

Compliance Task Desktop Function

Compliance Templates that have been created, setup and applied to the database will function as designed by the Administrator. Depending upon the first Date Trigger set, the Tasks created with this trigger will populate automatically by the system.

Example: The following is an example and explanation of this process for users completing this Compliance Task template within the Desktop (.Net)

*** First trigger was set to be Job Creation, Customer Contacted date is set to be the criteria to activate the tasks created by the Administrator within this template.*

Job Snapshot

Update Loss MW1094

210 Mill St, Ewing, IL 62836 United States

Job Progress: Customer Contacted ▼

Loss Type: Water ▼

Cause of Loss Type: Supply Line Leak ▼

XA ID#: ✕

Date of Loss: 07/07/2023 08:47 ... 📅 ⌚ ⌛ ✕

Date Received: 07/07/2023 08:47 ... 📅 ⌚ ⌛ ✕

Assignment Received: 📅 ⌚ ⌛ ✕

Customer Contacted: 07/07/2023 07:00 ... 📅 ⌚ ⌛ ✕

As the dates are entered within the Job Snapshot the Compliance Progress blocks will provide the User with the progress. ***Note: The Task count is not applicable to manually entered Tasks or Task Template tasks.* If there are Compliance Tasks associated the progress, the block will display the color of the Task Accountability such as Yellow for Due Today, Green for due in the Future and Red for Overdue. The checkmark will not display within the progress block until everything is complete (Dates & Compliance Tasks). ***Note: This progress screen is defaulted to be open each time the user opens a Job, to close this screen please use the Expand/Contract icon (⌵) on the upper right of this screen.*

Compliance Progress ⌵

✓

New Lead/Job

✓

Customer Contacted

✓

Site Inspected

✓

Estimate Complete & Submitted

✓

WA/Contract Signed

2

In Production

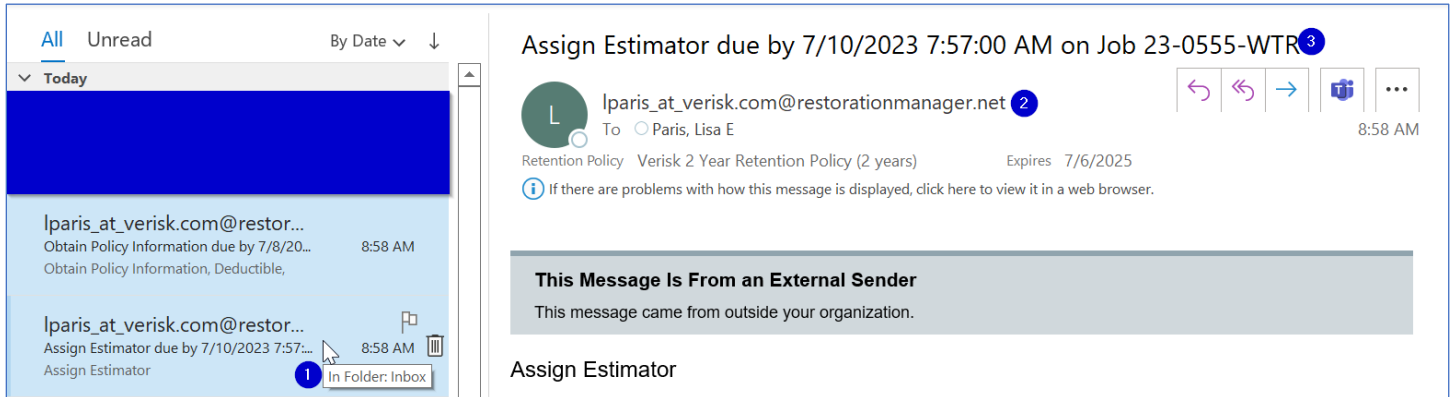
1

Job Completed

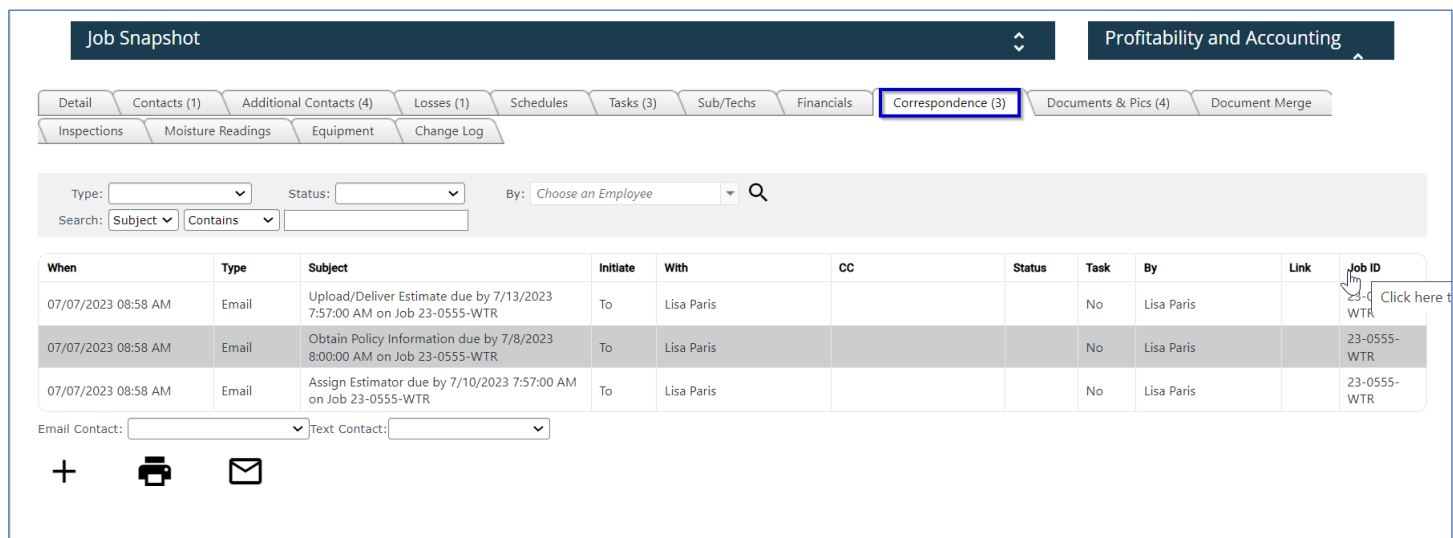
1

Paid in Full - File Closed

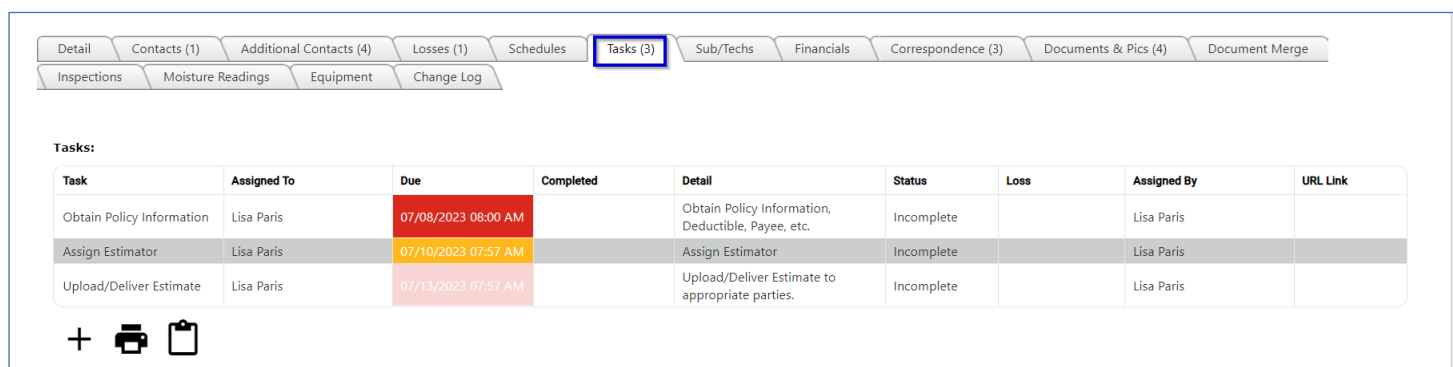
Once the criteria have been met (date entry), not only will the Compliance Progress be updated, the template will also automatically perform the following functions based on the setup of template. Notification email to the assignee of tasks will be sent, and set the assigned tasks based on the Administrators creation/setup.



1. Assigned User receives notification of Task to be performed in Users' provider email.
2. Notification email will be sent from @restorationmanager.net
3. Subject line will contain the task name, due date & Job ID



The Notification Email will be in the Job Correspondence for historical record keeping of communications



The assigned Tasks will be located in the Task tab, Task Dashboard and is calculated in the Task Performance Dashboard. The User will perform and complete the Task as per usual when it is due, this action may prompt the next step/s in completing the task, such as additional information required, i.e., Correspondence note, Job Custom Field, dates, etc. Tasks that have not met the criteria to be assigned (due to the template setup) will not show until the criteria have been met for that task setup. Tasks that have met the criteria and are assigned, the date will be highlighted with the corresponding color; this provides the User timeline of this task at a quick glance. Example: Red = Overdue, Yellow = Due Today, Future = Green, etc.

Examples of Task with additional information requirement:

The User will select the Task to complete and click on the Complete icon (✔️) A popup screen will appear for Additional Information, the User must include the requested information in order to complete this particular task.

Tasks:

Task	Assigned To	Due	Completed	Detail	Status	Loss	Assigned By	URL Link
Obtain Policy Information	Lisa Paris	07/08/2023 08:00 AM		Obtain Policy Information, Deductible, Payee, etc.	Incomplete		Lisa Paris	
Assign Estimator	Lisa Paris	07/10/2023 07:57 AM		Assign Estimator	Incomplete		Lisa Paris	
Upload/Deliver Estimate	Lisa Paris	07/13/2023 07:57 AM		Upload/Deliver Estimate to appropriate parties.	Incomplete		Lisa Paris	

Task: Obtain Policy Information Due: 07/08/2023 08:00 AM

URL Link:

Detail: Obtain Policy Information, Deductible, Payee, etc.

Resolution: completed, obtained information

Assign To: Lisa Paris (MidWest Construction) Assigned By: Lisa Paris Add new task

Email when task is completed

Icons: Save, Complete (✔️), Cancel (❌), Delete (🗑️)

1. Note
2. Deductible Amt

Additional Information

Note: Spoke with adjuster, per adjuster the contents are to be inventoried, clean salvageable and keep the non-salvageable for their inspection for replacement.

Deductible Amt: 500.00

Icons: Save, Cancel (❌)

The User will include the Additional Information, in this example a Note is required. This 'Note' will be recorded in the Job Correspondence tab for historical reference.

Detail | Contacts (1) | Additional Contacts (4) | Losses (1) | Schedules | Tasks (3) | Sub/Techs | Financials | Correspondence (4) | Documents & Pics (4) | Document Merge

Inspections | Moisture Readings | Equipment | Change Log

Type: Status: By: Choose an Employee

Search: Subject Contains

When	Type	Subject	Initiate	With	CC	Status	Task	By	Link	Job ID
07/10/2023 10:53 AM	Conversation	Note added from completion of Compliance Task	To				No	Lisa Paris		23-0555-WTR
07/07/2023 08:58 AM	Email	Upload/Deliver Estimate due by 7/13/2023 7:57:00 AM on Job 23-0555-WTR	To	Lisa Paris			No	Lisa Paris		23-0555-WTR
07/07/2023 08:58 AM	Email	Obtain Policy Information due by 7/8/2023 8:00:00 AM on Job 23-0555-WTR	To	Lisa Paris			No	Lisa Paris		23-0555-WTR
07/07/2023 08:58 AM	Email	Assign Estimator due by 7/10/2023 7:57:00 AM on Job 23-0555-WTR	To	Lisa Paris			No	Lisa Paris		23-0555-WTR

Type: Conversation Date: 07/10/2023 Time: 10:53 AM Progress:

To: With: CC:

Subject: Note added from completion of Compliance Task

Spoke with adjuster, per adjuster the contents are to be inventoried, clean salvageable and keep the non-salvageable for their inspection for replacement.

The User will also include the Deductible Amt, this is recorded in the Detail tab within the Additional Info 'Job Custom Fields'

Additional Info	
Property Type: Residential	Policy Number: HO2008-12345678
	Deductible Amt: 500.00
	Structure Type: Please Select...
	Roof: Please Select...
	Is Multi Unit: <input type="radio"/> Yes <input checked="" type="radio"/> No
	# Levels: