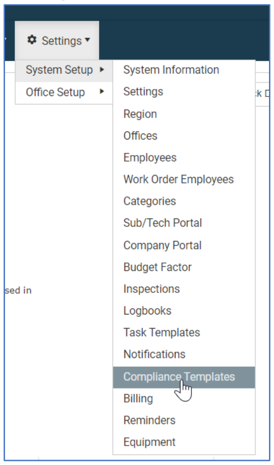
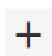
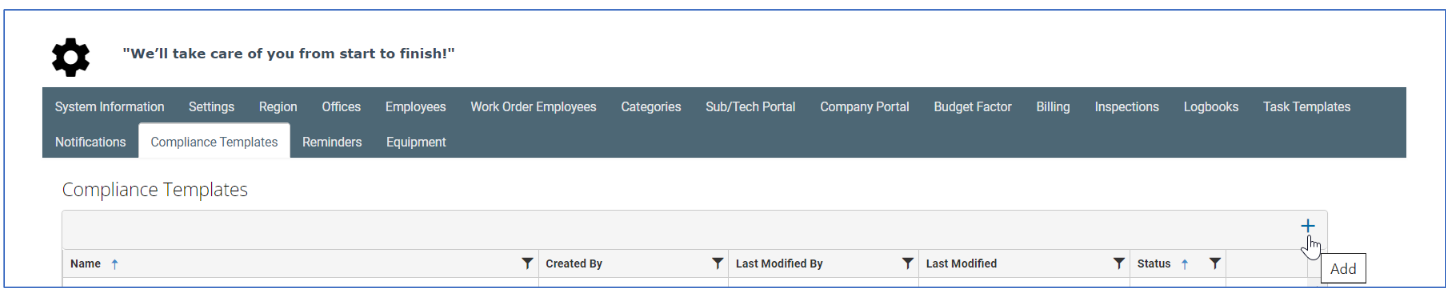
Compliance Templates – Admin Setup

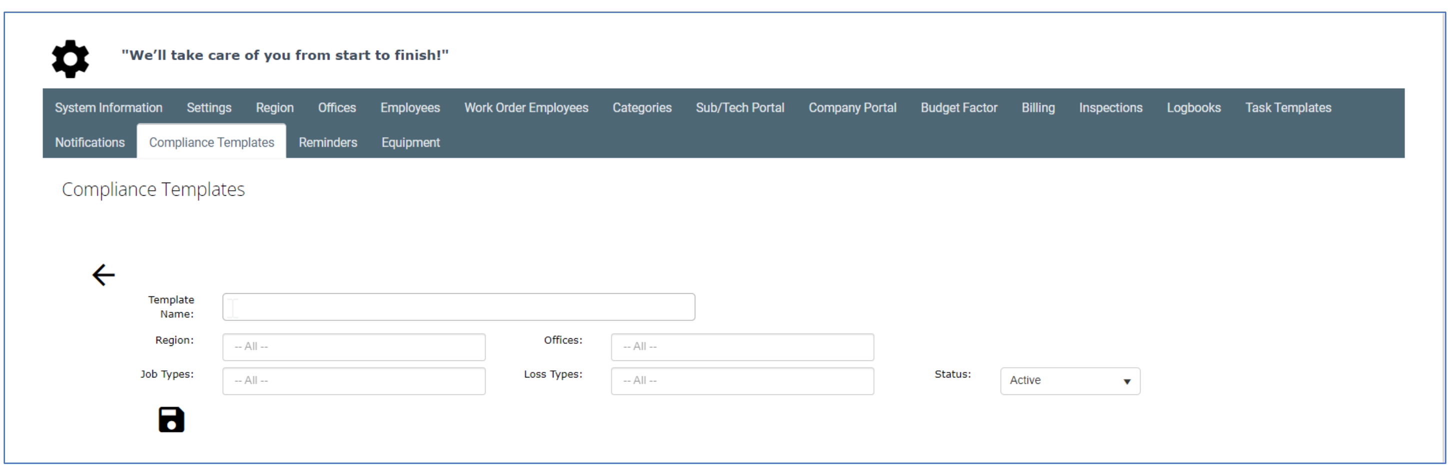
To perform the Administrative Setup of Compliance Templates, go to Settings→System Setup→Compliance Templates



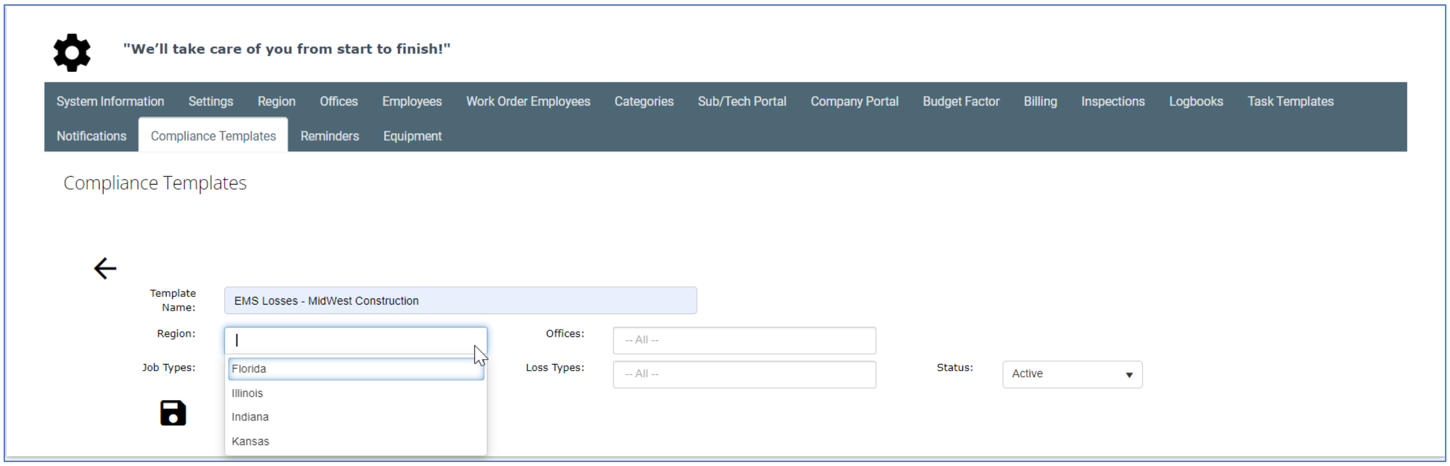
Select the Add icon 



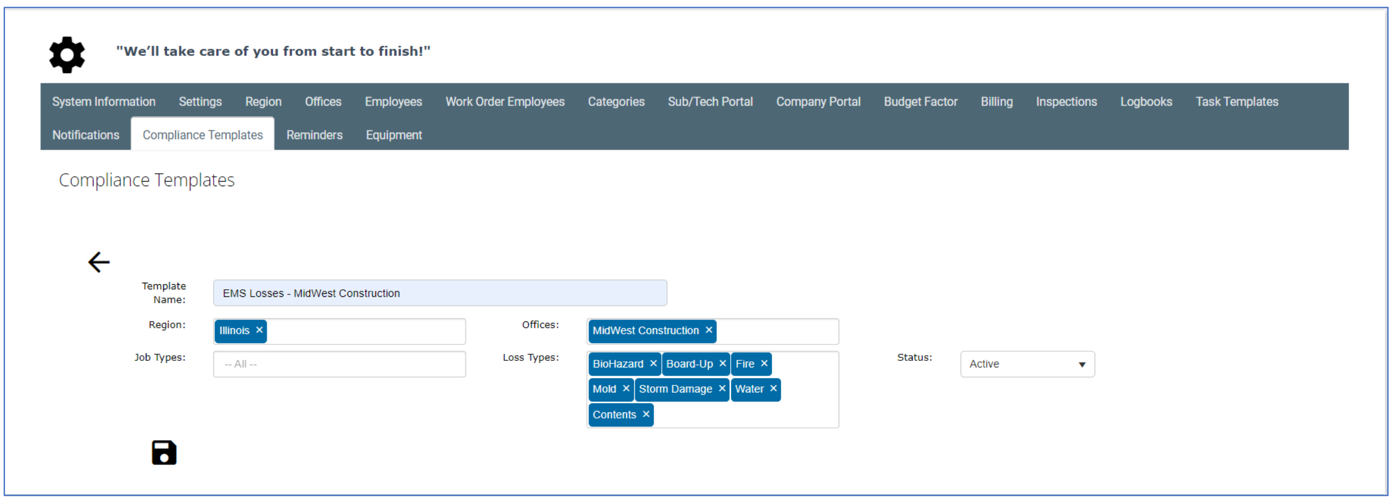
Create an identifying name for this template, input this into the field labeled Template Name.



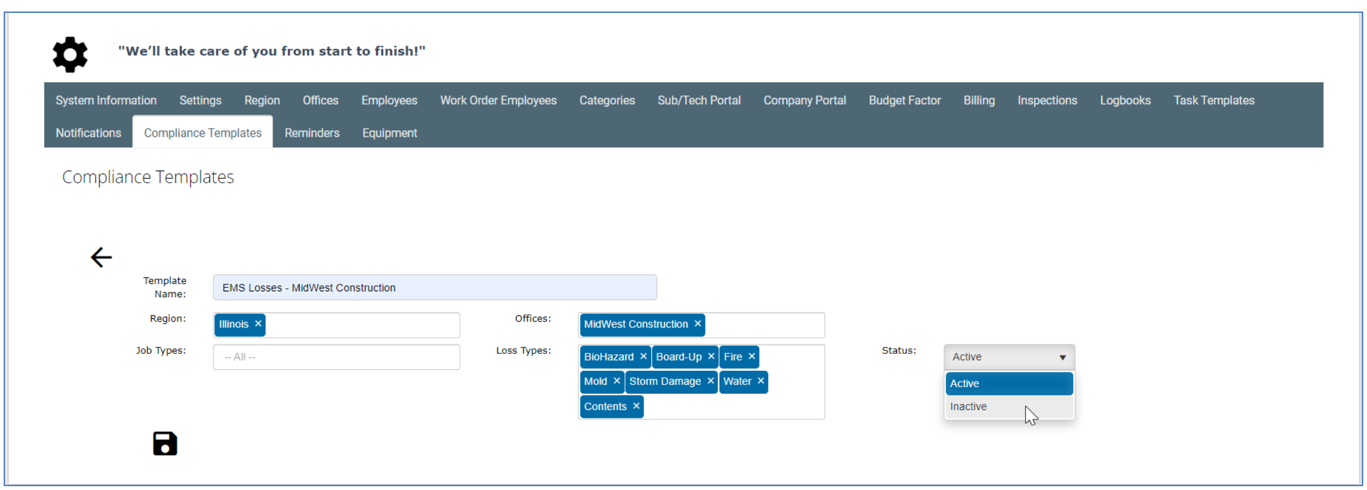
Select from the pulldown the Region that this template will be applied.



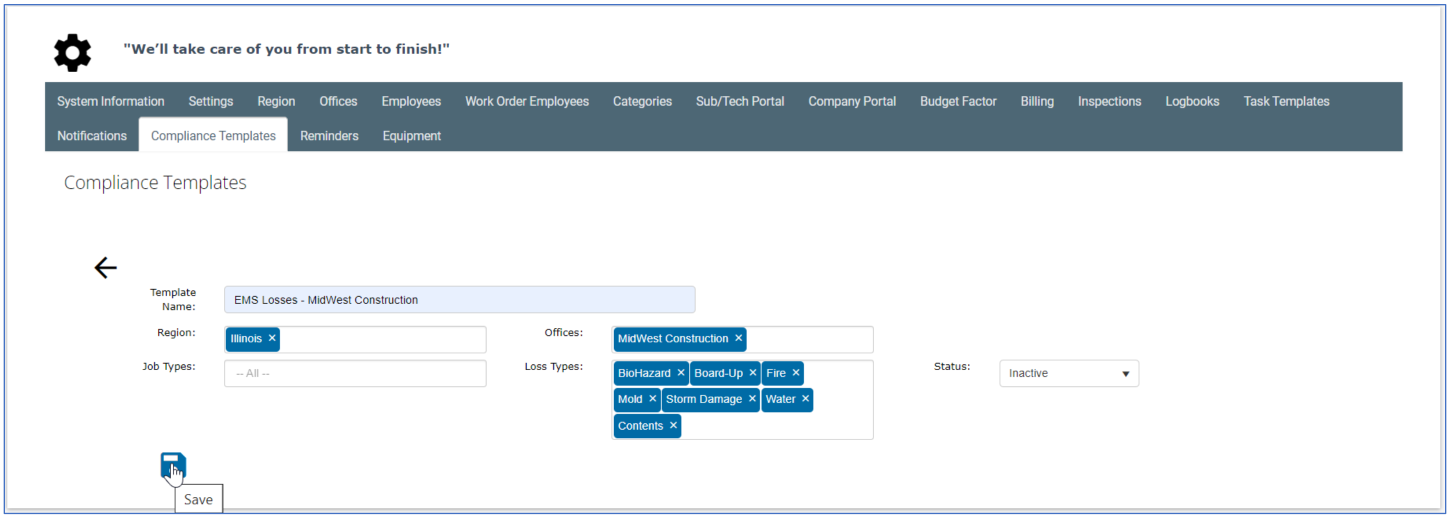
Perform the same selection for each field, Offices, Job Types & Loss Types. Should the Administrator wish for all items in the pulldown to be included then do not select any within the pulldown. This is an automatic default to –All–



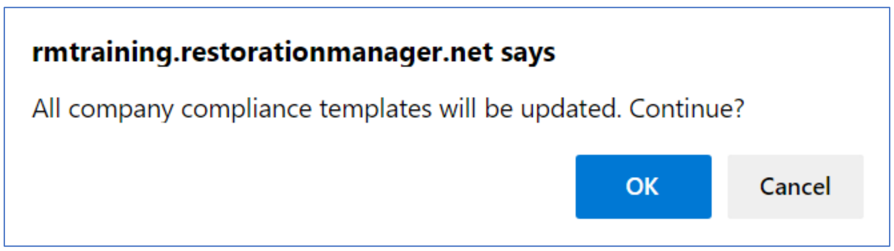
It is strongly recommended that the Status be moved Active to Inactive at this time. This will not hinder creating the template, this will ensure that the template in the creation process is not applied to the database prior to completion. Once the Administrator has completed the template, they may adjust this to Active.



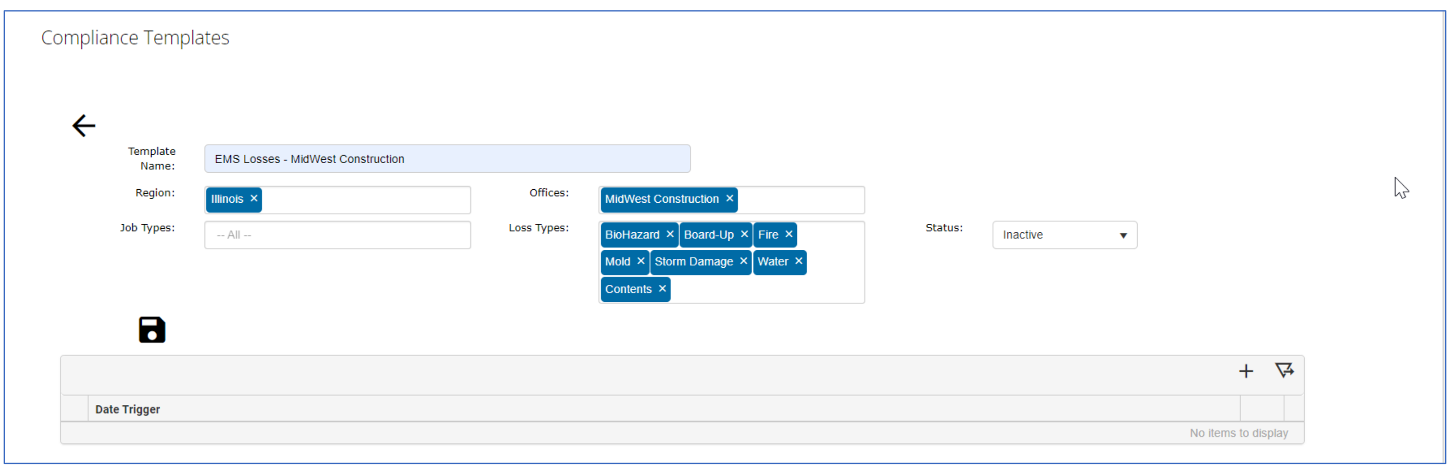
Click on the Save icon to complete the Template Name & Criteria setup.



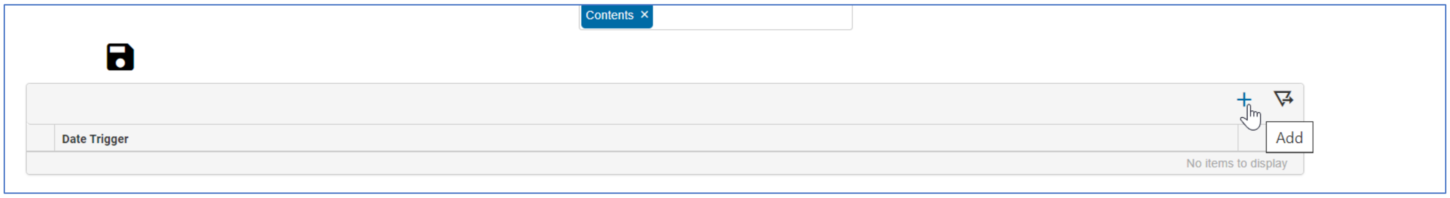
Upon clicking the Save icon a popup will appear; this is to confirm that by Saving this template the Compliance Templates list will be updated.



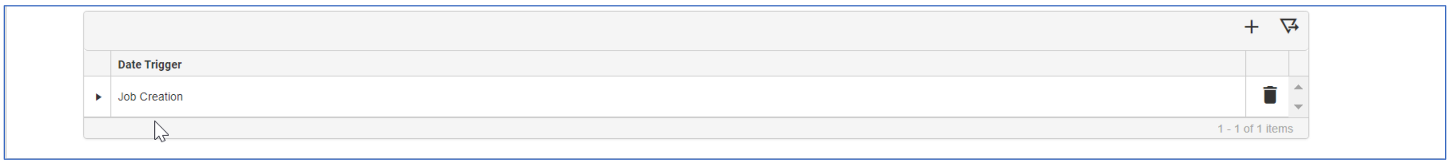
The Administrator may begin to create the date triggers and tasks that are to be included in this template.



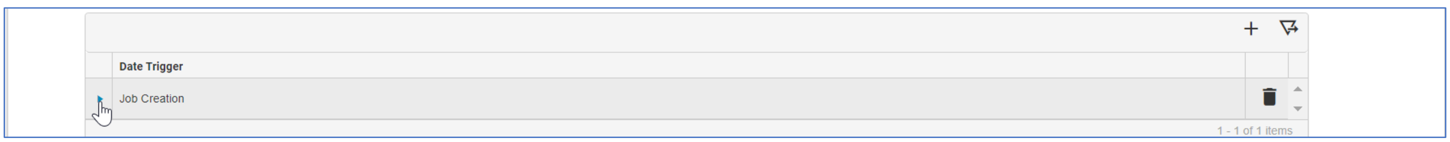
To add triggers, click on the Add icon + ; Date Triggers are dates that are included in the Job Snapshot, these dates are important steps or processes that must be addressed and completed to provide movement within the job.



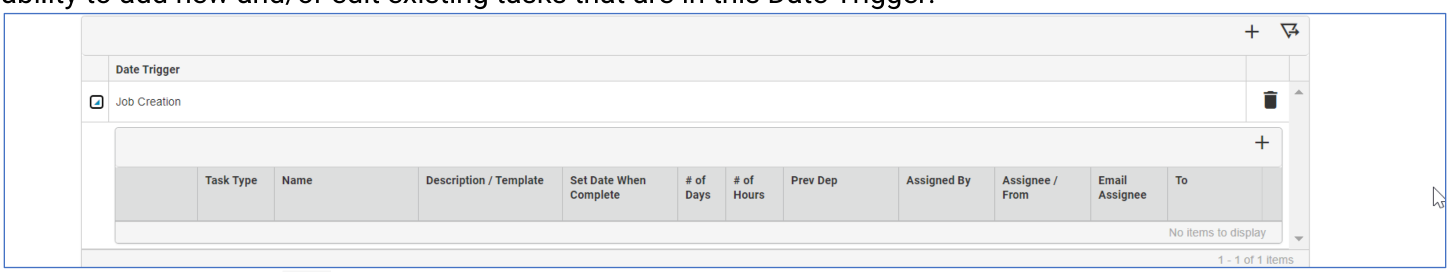
The Administrator will determine at which date should the template begin once a date is selected it will not show in the pulldown for the next date selection. Here we have selected Job Creation for our first Date Trigger.



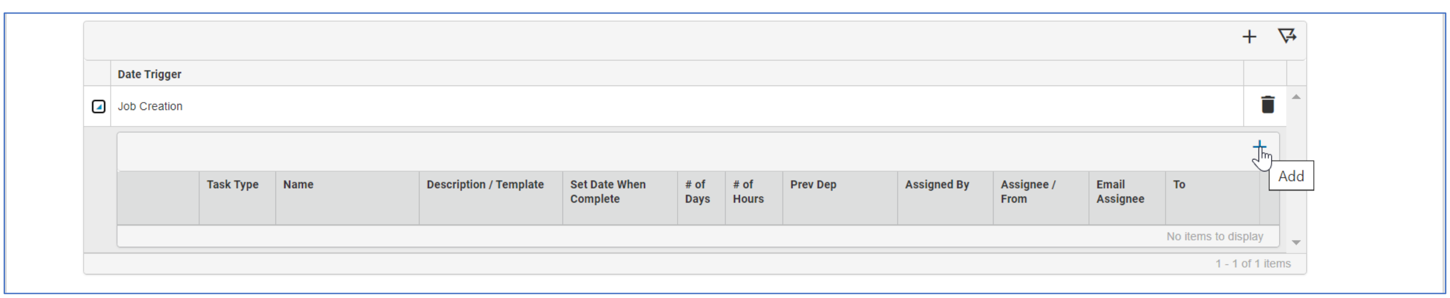
Open the Date Trigger by clicking on the arrow to the left of the trigger label.



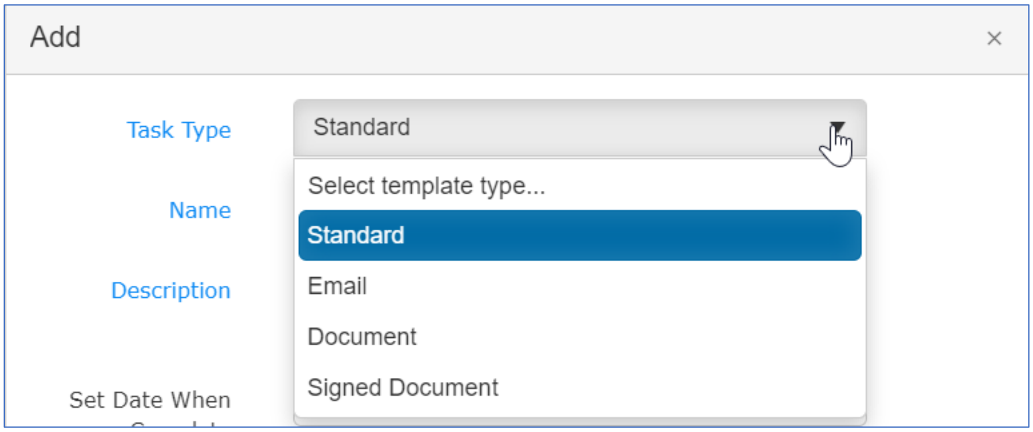
This will open the list of Tasks that are included on this Date Trigger. This area will provide the Admin the ability to add new and/or edit existing tasks that are in this Date Trigger.



Click on the Add icon + to open the Add screen.



The Add screen has four (4) types of Tasks to choose from: Standard, Email, Document and Signed Document.



Standard – This option will provide the Administrator with the ability to automatically set a date within the Job Snapshot upon completion of this task, set the time frame in which this task is to be completed, if there is a prior task within this date trigger that must be performed prior to this task being completed, who is assigned to the task inside of the company, email notification upon completion of the task to employees, adjusters, contacts, etc. The Administrator could set this task as a reoccurring task until a date has been included in the Job Snapshot to end the reoccurrence. This task can also require the assignee to complete items such as input correspondence and/or upload photos and how many photos are required.

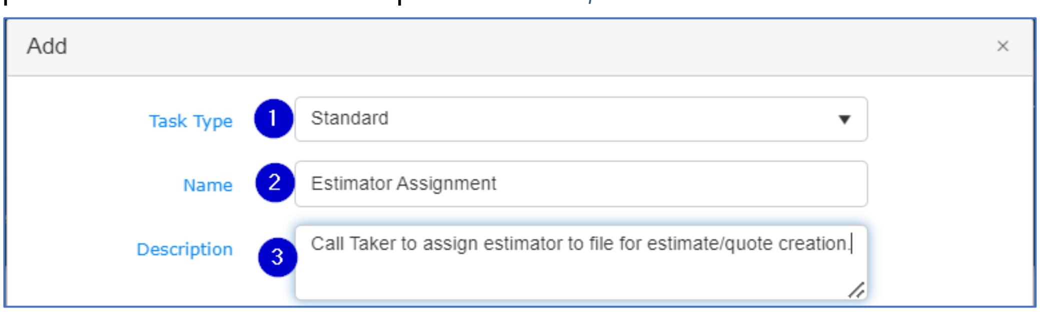
Email - This option will provide the Administrator with the ability to automatically send an email template to recipients (To & CC) from the selected job roles, when the task is marked as completed. Also, the Administrator may opt to include documents, photos, etc. to be attached to the email template.

Document – This option will provide the Administrator with the ability to task an employee and provide the employee with the document that correlates with this task action.

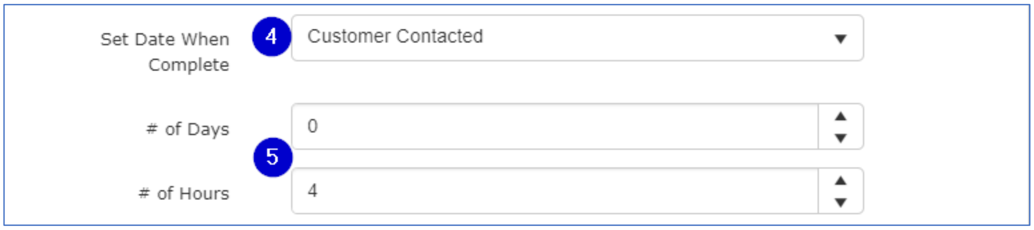
Signed Document – This option will provide the Administrator with the ability to task an employee and provide the assigned employee with the document that includes a signature for this task action.

<u>Standard Task Type</u>:

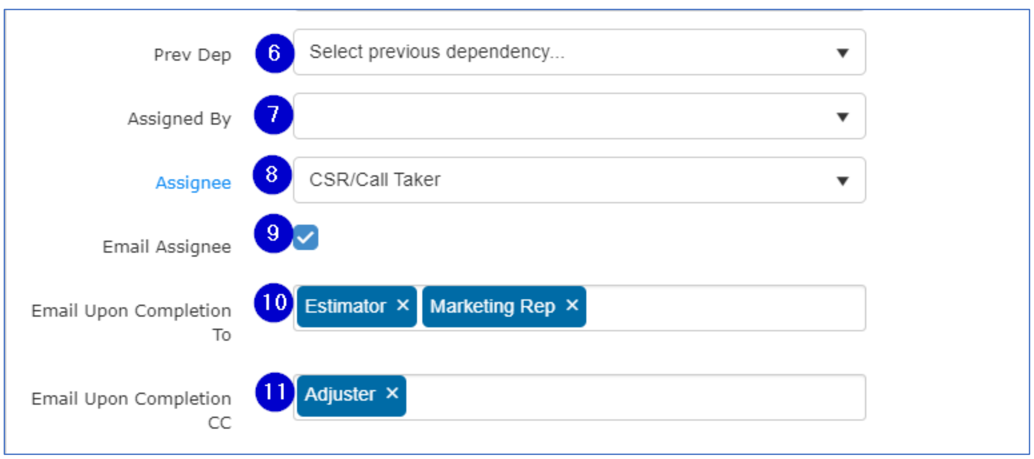
1. Task Type: Select Task Type to Standard ***Required***
2. Name: Input Name of Task ***Required***
3. Description: Describe the task to be performed ***Required***



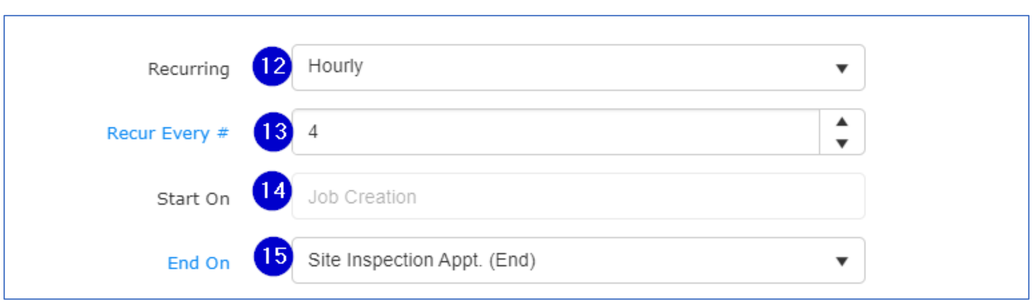
4. Select date from pulldown to be automatically inserted into the Job Snapshot when this task has been marked completed.
5. Set the time frame that this task is to be completed by; number of Days, Hours, or both. This number of days or hours is metered directly from the Date Trigger in which this task is being created.



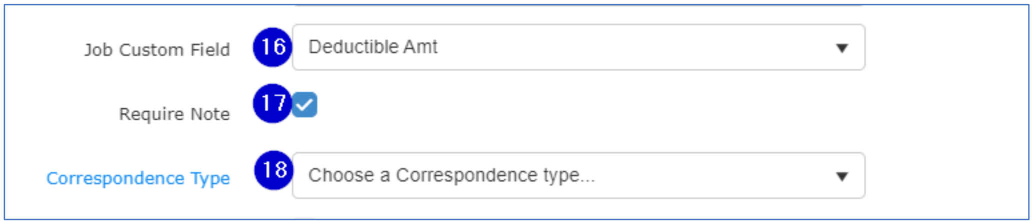
6. Prev Dep: Previously Depends Upon refers to a task within the Date Trigger. This previous task must be completed prior to this task to becoming active.
7. Assigned By: Select employee from pulldown that is assigning this task.
8. Assignee: Select employee role on the job is to be assigned this task. ***Required***
9. Email Assignee: Check this box to have the Assignee notified by email of this task assignment. This is a default email that is emailed from Restoration Manager, this email is non-editable.
10. Email Upon Completion To: Select from the pulldown which employee role or roles are to be notified by email that this task has been completed. This is a default email that is emailed from Restoration Manager, this email is non-editable.
11. Email Upon Completion CC: Select from the pulldown which Job Contact (Title and/or Position) is to be copied on the email Completion email notification.



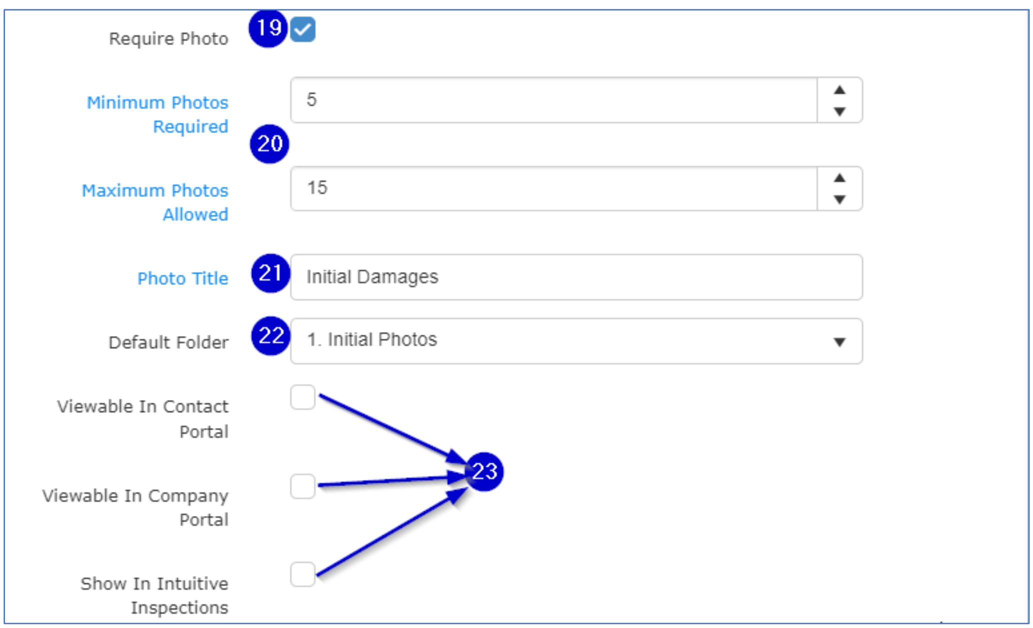
12. Recurring: To set this task to repeat until the determined end date has been included in the Job Snapshot. Select from the pulldown Hourly, Daily & Weekly.
13. Recur Every #: Select the frequency that the task is recurring.
14. Start On: This will be automatically input by Restoration Manager.
15. End On: Select which date from the pulldown must be input into the Job Snapshot to end the recurrence of this task. *Note: This task as well all Compliance tasks created on a job will be canceled should the Not Sold date be entered into the Job Snapshot.*



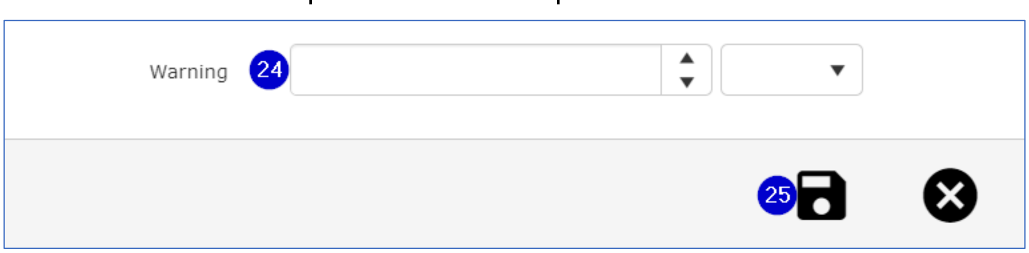
16. Job Custom Fields: The Administrator may opt to use these fields for input of additional information directly related to this task.
17. Required Note: Check mark this box if correspondence is required to complete this task. ***Note: The task cannot be completed by the assignee without performing this action.*
18. Correspondence Type: Select from the pulldown the type. Once the assignee provides the correspondence it will be automatically marked this type of correspondence



19. Required Photo: Should this task require photos to be provided check this box. ***Note: The task cannot be completed by the assignee without performing this action.*
20. Minimum Photos Required: Select the number of photos
    Maximum Photos Allowed: Select the number photos
21. Photo Title: The Administrator will provide the name that is to automatically display on these photos.
22. Default Folder: Select from the pulldown which Document Folder these photos are to be automatically inserted for this task.
23. The Administrator may opt to have the included Photos to display within the Job & Company Portals or show in the Intuitive Inspections. Checkmark the appropriate boxes for this action.

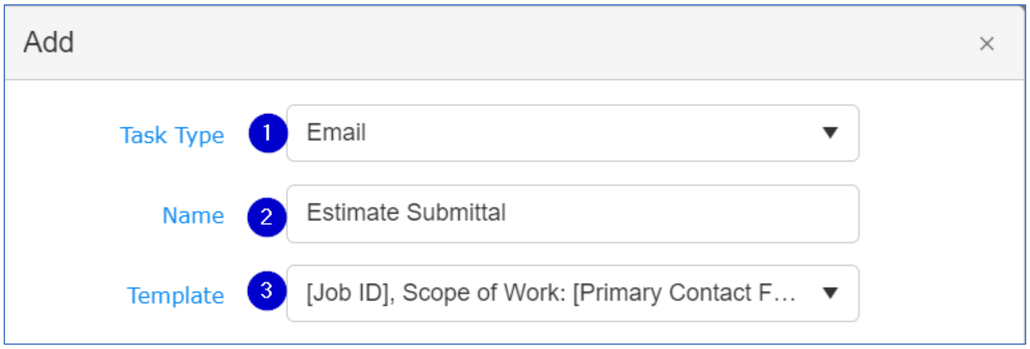


24. Warning: Feature to be deployed in the future.
25. Click on the Save icon to complete the Task setup.

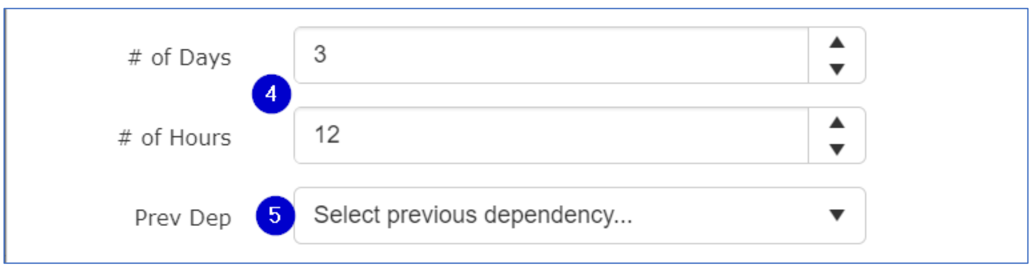


Email Task Type:

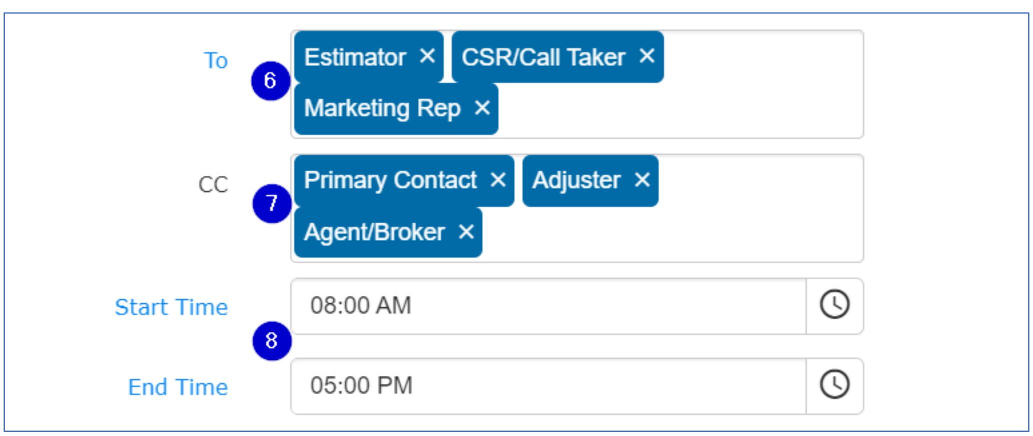
1. Task Type: Select Task Type to Standard ***Required***
2. Name: Input Name of Task ***Required***
3. Description: Describe the task to be performed ***Required***



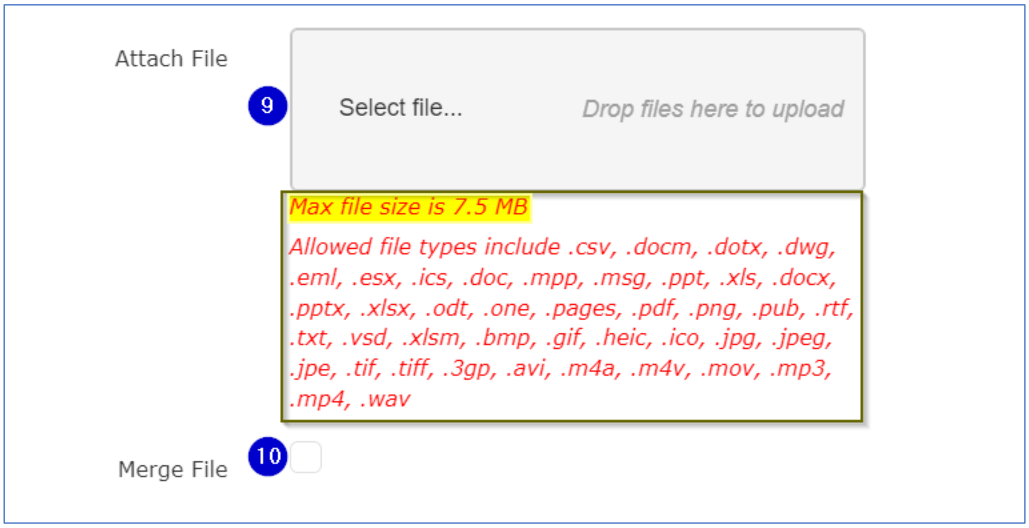
4. Set the time frame that this task is to be completed by; number of Days, Hours, or both.
5. Select the Prev Dep, Previously Depends Upon refers to a task within the Date Trigger. This previous task must be completed prior to this task to becoming active.



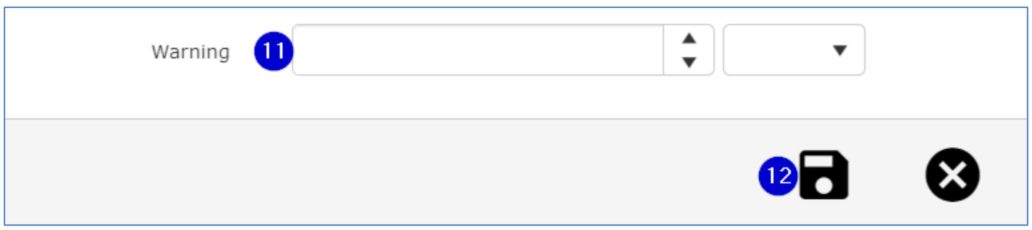
6. Select the To recipient, these recipient/s are roles within the job, and may be selected from the pulldown. ***Note: Should this role not be populated in the job; the email will not be sent, if the role is populated but the individual in the role does not have an email; the email will not be sent.*
7. Select the CC recipient if required, these recipient/s are roles within the job, and may be selected from the pulldown. ***Note: Should this role not be populated in the job; the email will not be sent, if the role is populated but the individual in the role does not have an email; the email will not be sent.*
8. Set the time frame in which the email will be sent to the selected recipients



9. Attach File: Ensure the document is one of the approved formats and file size.
10. Merge File: Should the document attached be a Document Template with viable merge fields the database will populate the merge fields within this document prior to sending the email. ***Note: These documents are specifically Word Docs that have been created by the Administrator to be used within the document merge functionality.*

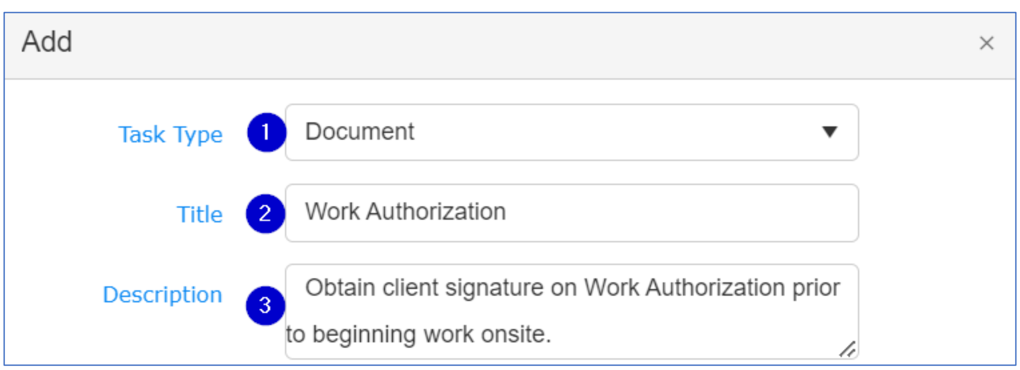


11. Warning: Feature to be deployed in the future.
12. Save: Click on Save icon to complete the Task setup

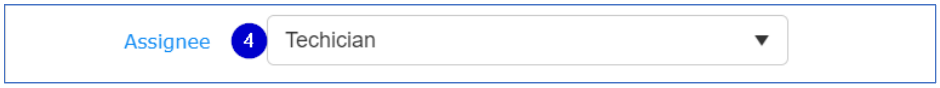


Document Task Type:

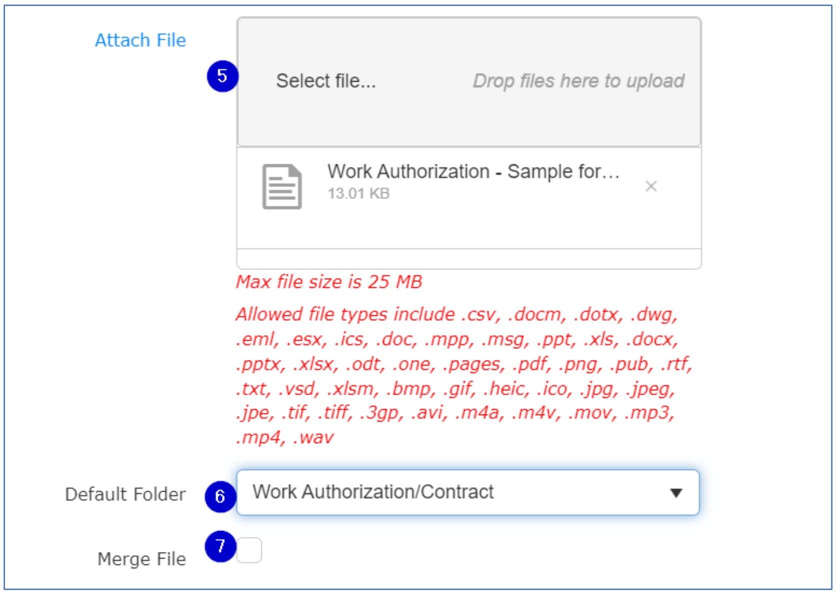
1. Task Type: Select Task Type to Standard ***Required***
2. Name: Input Name of Task ***Required***
3. Description: Describe the task to be performed ***Required***



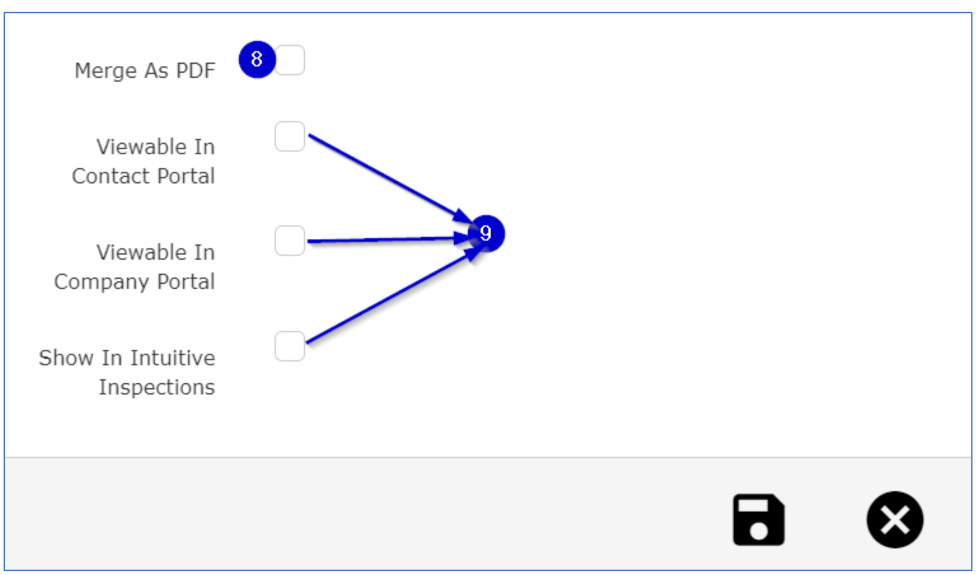
4. Assignee: Set the Assignee, this will be an Employee Role on the job.



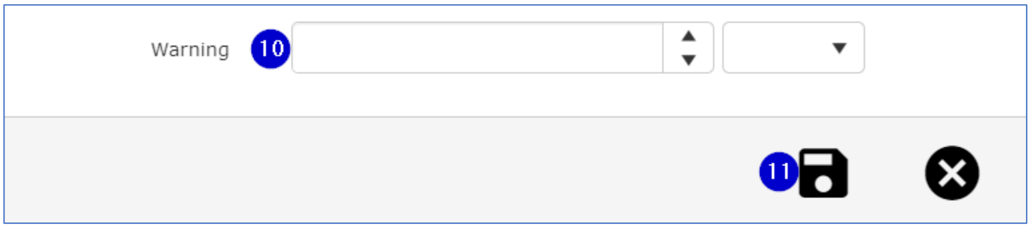
5. Attach File: Select approved document, choose the format from the 'Allowed file types' to be attached to this assigned task.
6. Default Folder: Choose the Default Folder from the pulldown, this document will be directly loaded into this folder for the Assignee to locate.
7. Merge File: Should the document attached be a Document Template with viable merge fields the database will populate the merge fields within this document prior to sending the email. ***Note: These documents are specifically Word Docs that have been created by the Administrator to be used within the document merge functionality.*



8. Merge As PDF: When attaching Document Templates, if a signature is required with the mobile applications, it ***must*** be in the PDF format. The Administrator ***must*** check this box if signature/s are required on the attached document template.
9. Viewable/Show Options: The Administrator may opt to have the included 'Attached File' to display within the Job & Company Portals or show in the Intuitive Inspections. Checkmark the appropriate boxes for this action.

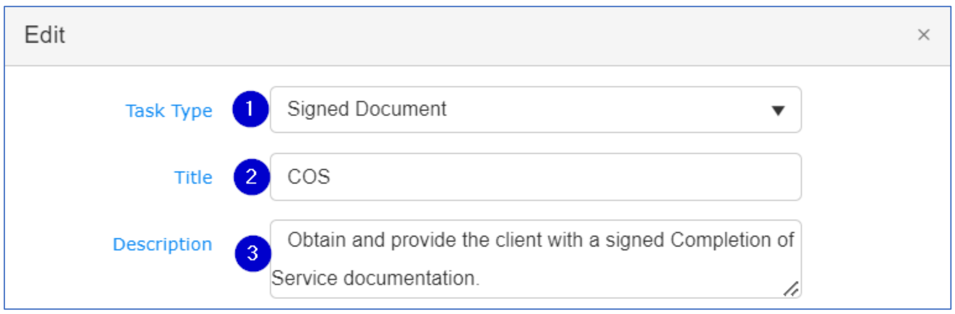


10. Warning: Feature to be deployed in the future.
11. Save: Click on Save icon to complete the Task setup.

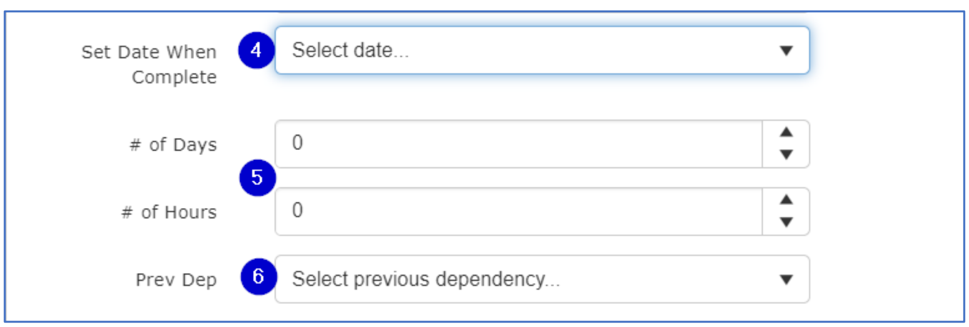


Signed Document Task Type:

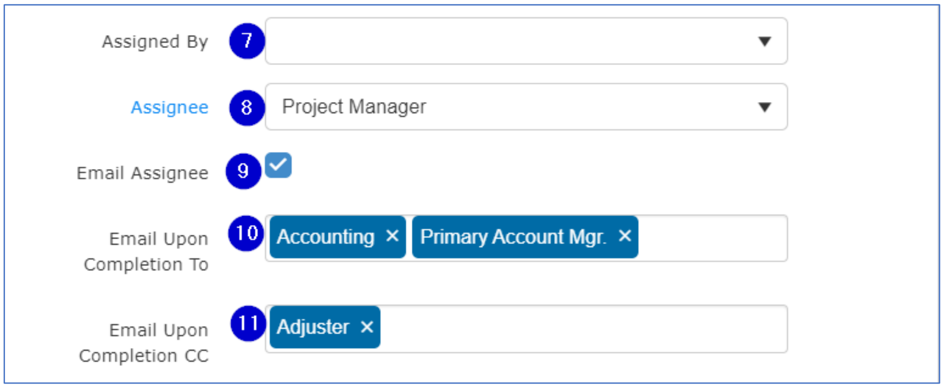
1. Task Type: Select Task Type to Standard ****Required*****
2. Name: Input Name of Task ****Required*****
3. Description: Describe the task to be performed ****Required*****



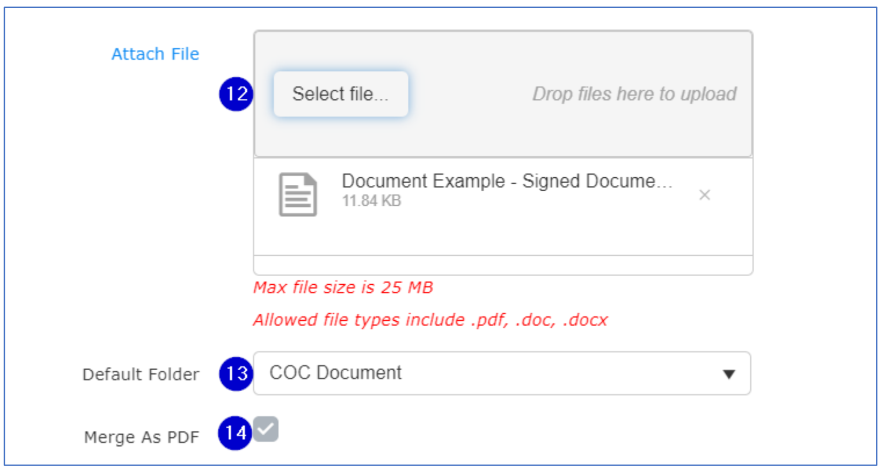
4. Select date from pulldown to be automatically inserted into the Job Snapshot when this task has been marked completed.
5. Set the time frame that this task is to be completed by; number of Days, Hours, or both. This number of days or hours is metered directly from the Date Trigger in which this task is being created.
6. Prev Dep: Previously Depends Upon refers to a task within the Date Trigger. This previous task must be completed prior to this task to becoming active.



7. Assigned By: Select employee from pulldown that is assigning this task.
8. Assignee: Select employee role on the job is to be assigned this task. ****Required*****
9. Email Assignee: Check this box to have the Assignee notified by email of this task assignment. This is a default email that is emailed from Restoration Manager, this email is non-editable.
10. Email Upon Completion To: Select from the pulldown which employee role or roles are to be notified by email that this task has been completed. This is a default email that is emailed from Restoration Manager, this email is non-editable.
11. Email Upon Completion CC: Select from the pulldown which Job Contact (Title and/or Position) is to be copied on the email Completion email notification.



12. Attach File: Select approved document, choose the format from the 'Allowed file types' to be attached to this assigned task. ***Required***
13. Choose the Default Folder from the pulldown, this document will be directly loaded into this folder for the Assignee to locate.
14. Merge File: Should the document attached be a Document Template with viable merge fields the database will populate the merge fields within this document prior to sending the email. ***Note: These documents are specifically Word Docs that have been created by the Administrator to be used within the document merge functionality.*



15. The Administrator may opt to have the included 'Attached File' to display within the Job & Company Portals or show in the Intuitive Inspections. Checkmark the appropriate boxes for this action.
16. Warning: Feature to be deployed in the future.
17. Save: Click on Save icon to complete the Task setup.