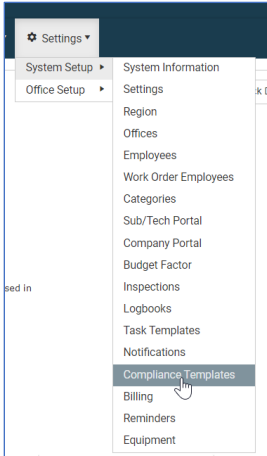

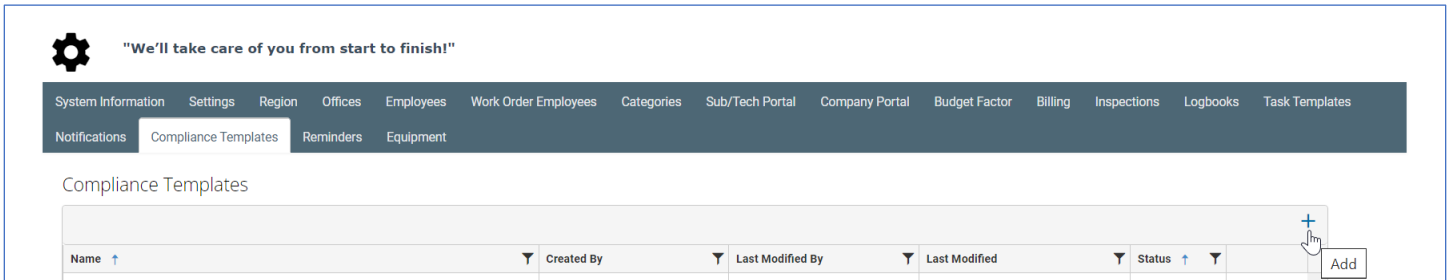


Compliance Templates – Admin Setup

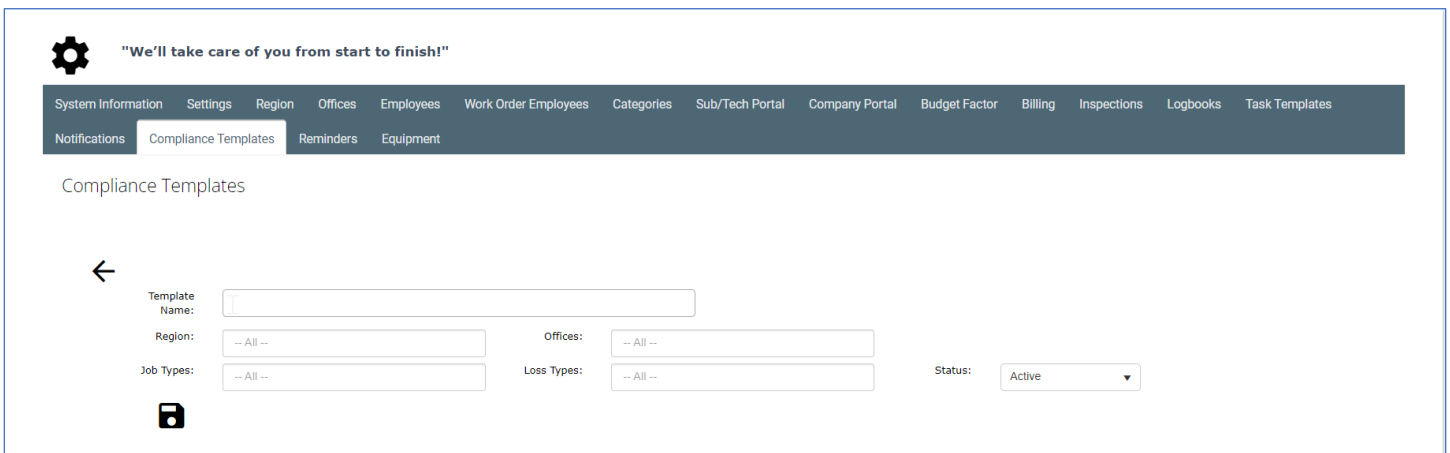
To perform the Administrative Setup of Compliance Templates, go to Settings→System Setup→Compliance Templates



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.

The screenshot shows the 'Compliance Templates' form in a web application. The header includes a gear icon and the slogan '"We'll take care of you from start to finish!'. Below the header is a navigation bar with tabs for System Information, Settings, Region, Offices, Employees, Work Order Employees, Categories, Sub/Tech Portal, Company Portal, Budget Factor, Billing, Inspections, Logbooks, and Task Templates. A secondary navigation bar includes Notifications, Compliance Templates (selected), Reminders, and Equipment. The main content area is titled 'Compliance Templates' and features a back arrow, a save icon, and a form. The form fields are: Template Name (EMS Losses - MidWest Construction), Region (dropdown menu open showing Florida, Illinois, Indiana, and Kansas), Job Types (dropdown menu open showing --All--), Offices (dropdown menu open showing --All--), Loss Types (dropdown menu open showing --All--), and Status (Active).

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--

The screenshot shows the 'Compliance Templates' form with several fields populated. The Template Name is 'EMS Losses - MidWest Construction'. The Region is set to 'Illinois'. The Offices are set to 'MidWest Construction'. The Job Types are set to '--All--'. The Loss Types are set to 'BioHazard', 'Board-Up', 'Fire', 'Mold', 'Storm Damage', 'Water', and 'Contents'. The Status is set to 'Active'.

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.

The screenshot shows the 'Compliance Templates' form with the Status dropdown menu open. The Status is currently set to 'Active', and the dropdown menu shows 'Active' and 'Inactive' options. The other fields remain the same as in the previous screenshot.

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


The screenshot shows a web application interface for setting up a compliance template. At the top, there is a navigation bar with a gear icon and the slogan "We'll take care of you from start to finish!". Below the navigation bar, there are several menu items: System Information, Settings, Region, Offices, Employees, Work Order Employees, Categories, Sub/Tech Portal, Company Portal, Budget Factor, Billing, Inspections, Logbooks, and Task Templates. A secondary row of menu items includes Notifications, Compliance Templates (which is highlighted), Reminders, and Equipment. The main content area is titled "Compliance Templates" and features a back arrow icon. The form fields are as follows: "Template Name" is a text input field containing "EMS Losses - MidWest Construction"; "Region" is a dropdown menu with "Illinois" selected; "Offices" is a dropdown menu with "MidWest Construction" selected; "Job Types" is a dropdown menu with "-- All --" selected; "Loss Types" is a multi-select area containing "BioHazard", "Board-Up", "Fire", "Mold", "Storm Damage", "Water", and "Contents"; and "Status" is a dropdown menu with "Inactive" selected. At the bottom left, there is a "Save" button with a floppy disk icon.

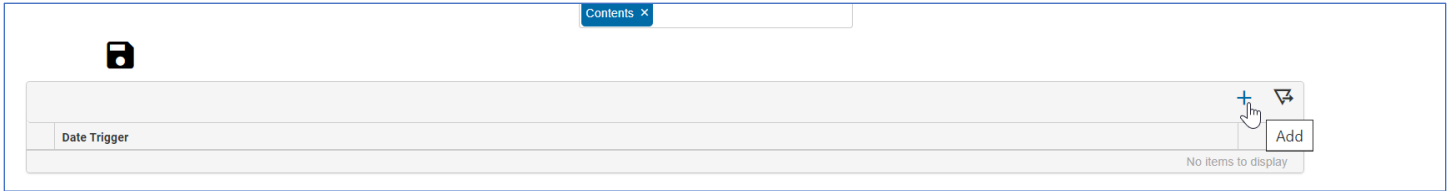
Upon clicking the Save icon a popup will appear; this is to confirm that by Saving this template the Compliance Templates list will be updated.

A confirmation dialog box with a white background and a blue border. It contains the text "rmtraining.restorationmanager.net says" in bold, followed by "All company compliance templates will be updated. Continue?". At the bottom, there are two buttons: a blue "OK" button and a grey "Cancel" button.

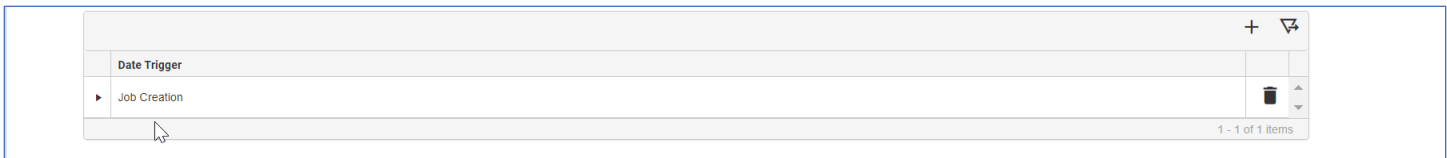
The Administrator may begin to create the date triggers and tasks that are to be included in this template.

The screenshot shows the "Compliance Templates" list in the application. It features a back arrow icon and the same form fields as the previous screenshot. Below the form fields, there is a table with a header row containing a plus sign and a trash icon. The table has one row with the text "Date Trigger". At the bottom right of the table, it says "No items to display".

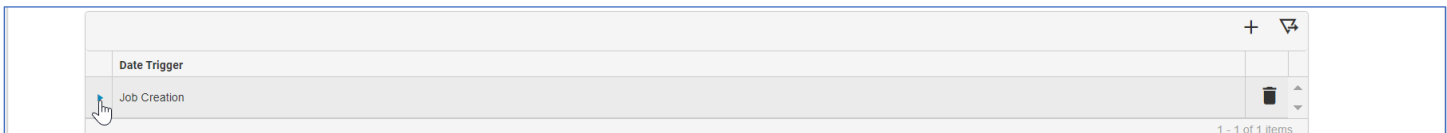
To add triggers, click on the Add icon ; Date Triggers are dates that are included in the Job Snapshot, these dates are important steps or processes that must be addressed and completed to provide movement within the job.



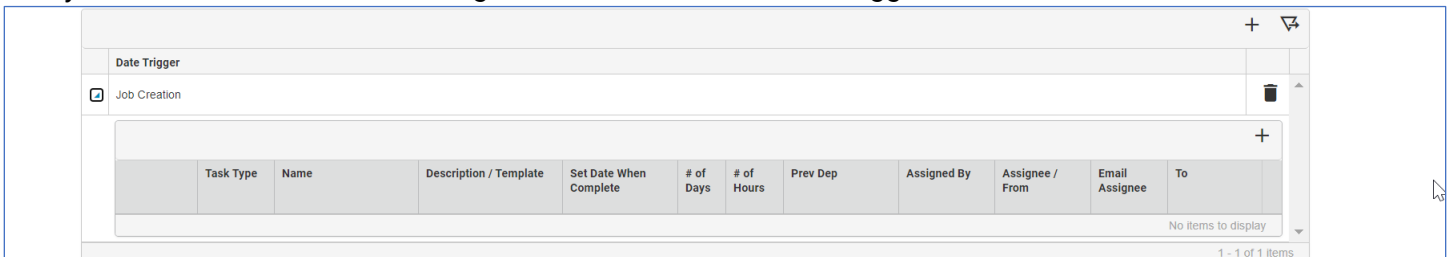
The Administrator will determine at which date should the template begin once a date is selected it will not show in the pulldown for the next date selection. Here we have selected Job Creation for our first Date Trigger.




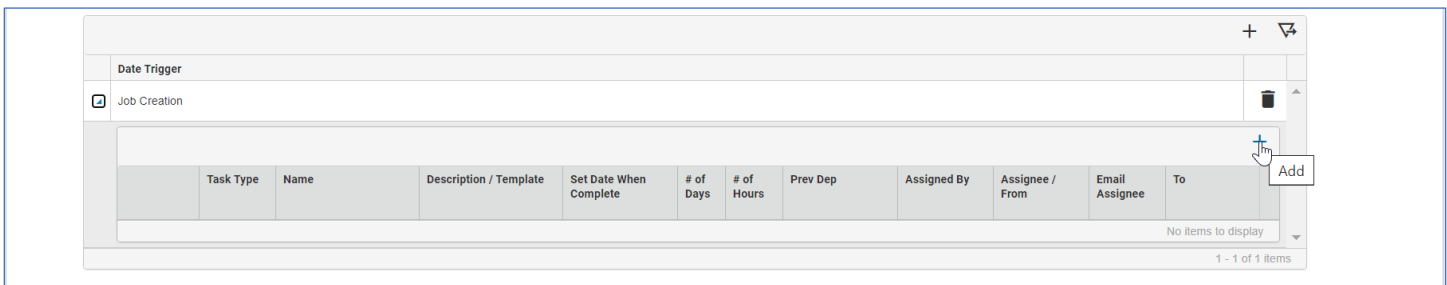
Open the Date Trigger by clicking on the arrow to the left of the trigger label.



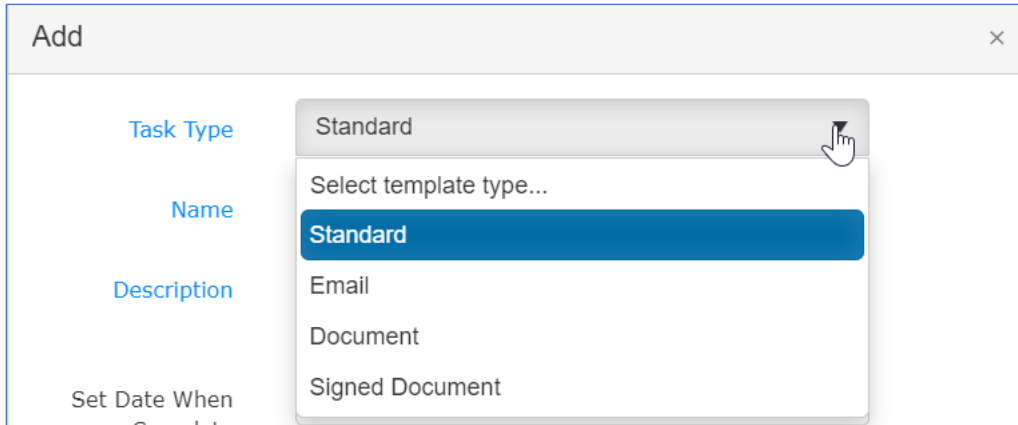
This will open the list of Tasks that are included on this Date Trigger. This area will provide the Admin the ability to add new and/or edit existing tasks that are in this Date Trigger.



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.

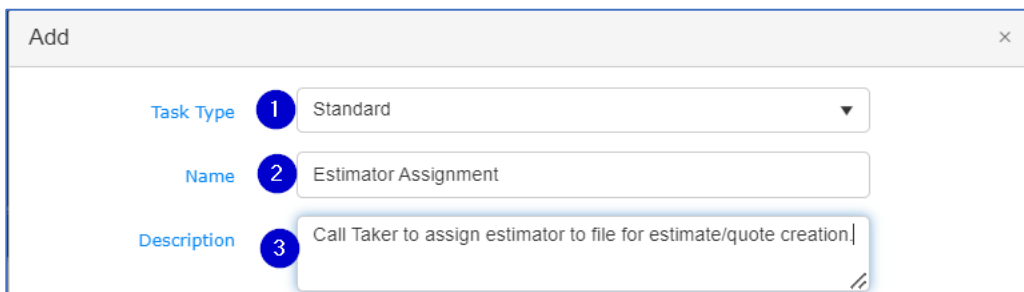
Email - This option will provide the Administrator with the ability to automatically send an email template to recipients (To & CC) from the selected job roles, when the task is marked as completed. Also, the Administrator may opt to include documents, photos, etc. to be attached to the email template.

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.

Standard 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.

A screenshot of a form section with three rows. The first row is labeled 'Set Date When Complete' and has a dropdown menu with 'Customer Contacted' selected. A blue circle with the number '4' is next to the dropdown. The second row is labeled '# of Days' and has a text input field with '0' and up/down arrows. A blue circle with the number '5' is next to the input. The third row is labeled '# of Hours' and has a text input field with '4' and up/down arrows.

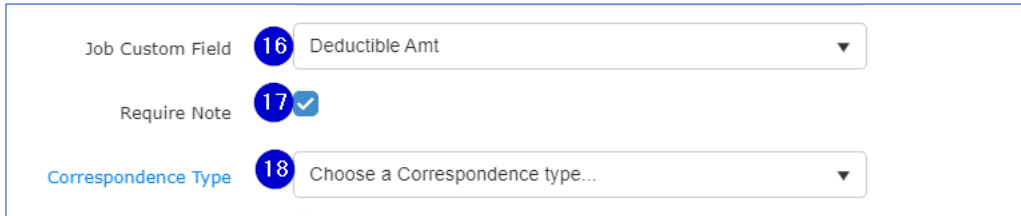
6. Prev Dep: Previously Depends Upon refers to a task within the Date Trigger. This previous task must be completed prior to this task to becoming active.
7. Assigned By: Select employee from pulldown that is assigning this task.
8. Assignee: Select employee role on the job is to be assigned this task. ****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.

A screenshot of a form section with six rows. The first row is labeled 'Prev Dep' and has a dropdown menu with 'Select previous dependency...' selected. A blue circle with the number '6' is next to the dropdown. The second row is labeled 'Assigned By' and has a dropdown menu. A blue circle with the number '7' is next to the dropdown. The third row is labeled 'Assignee' and has a dropdown menu with 'CSR/Call Taker' selected. A blue circle with the number '8' is next to the dropdown. The fourth row is labeled 'Email Assignee' and has a checked checkbox. A blue circle with the number '9' is next to the checkbox. The fifth row is labeled 'Email Upon Completion To' and has a multi-select dropdown with 'Estimator' and 'Marketing Rep' selected. A blue circle with the number '10' is next to the dropdown. The sixth row is labeled 'Email Upon Completion CC' and has a multi-select dropdown with 'Adjuster' selected. A blue circle with the number '11' is next to the dropdown.

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.*

A screenshot of a form section with four rows. The first row is labeled 'Recurring' and has a dropdown menu with 'Hourly' selected. A blue circle with the number '12' is next to the dropdown. The second row is labeled 'Recur Every #' and has a text input field with '4' and up/down arrows. A blue circle with the number '13' is next to the input. The third row is labeled 'Start On' and has a text input field with 'Job Creation'. A blue circle with the number '14' is next to the input. The fourth row is labeled 'End On' and has a dropdown menu with 'Site Inspection Appt. (End)' selected. A blue circle with the number '15' is next to the dropdown.

- 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

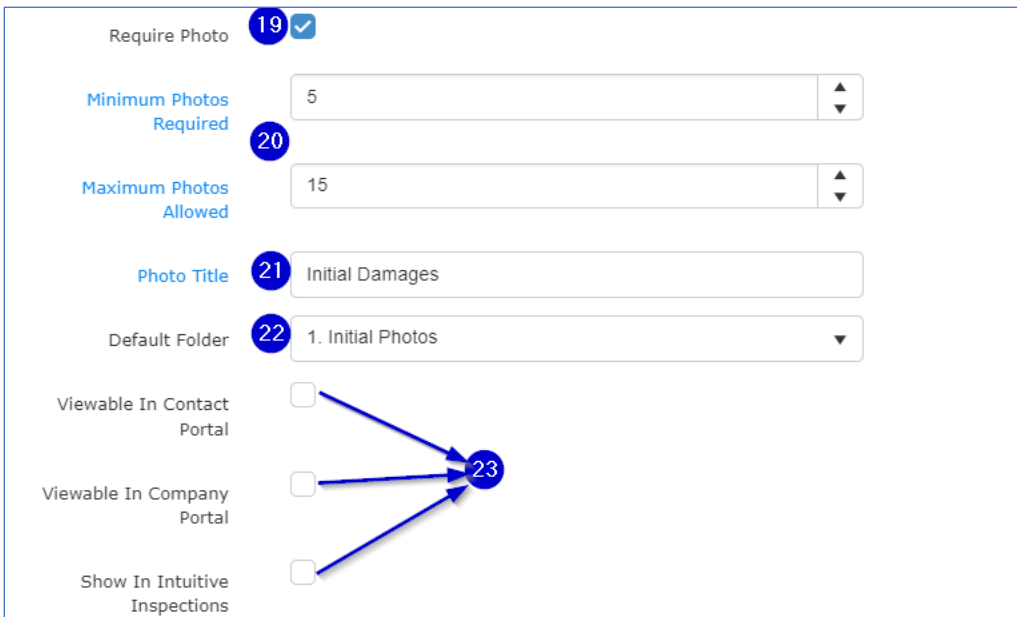


Job Custom Field **16** Deductible Amt

Require Note **17**

Correspondence Type **18** Choose a Correspondence type...

- 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.



Require Photo **19**

Minimum Photos Required **20** 5

Maximum Photos Allowed 15

Photo Title **21** Initial Damages

Default Folder **22** 1. Initial Photos

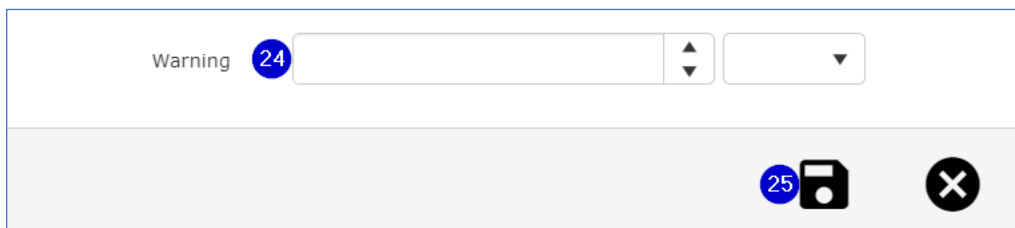
Viewable In Contact Portal

Viewable In Company Portal

Show In Intuitive Inspections

23 (indicated by arrows pointing to the checkboxes)

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



Warning **24**

25 Save Close

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****

Add ×

Task Type **1** Email ▼

Name **2** Estimate Submittal

Template **3** [Job ID], Scope of Work: [Primary Contact F... ▼

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.

of Days **4** 3 ▲▼

of Hours 12 ▲▼

Prev Dep **5** Select previous dependency... ▼

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

To **6** Estimator × CSR/Call Taker ×
Marketing Rep ×

CC **7** Primary Contact × Adjuster ×
Agent/Broker ×

Start Time **8** 08:00 AM ⌚

End Time 05:00 PM ⌚

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.*

Attach File

9 Select file... Drop files here to upload

Max file size is 7.5 MB

Allowed file types include .csv, .docm, .dotx, .dwg, .eml, .esx, .ics, .doc, .mpp, .msg, .ppt, .xls, .docx, .pptx, .xlsx, .odt, .one, .pages, .pdf, .png, .pub, .rtf, .txt, .vsd, .xslm, .bmp, .gif, .heic, .ico, .jpg, .jpeg, .jpe, .tif, .tiff, .3gp, .avi, .m4a, .m4v, .mov, .mp3, .mp4, .wav

Merge File 10

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

Warning 11

12

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***

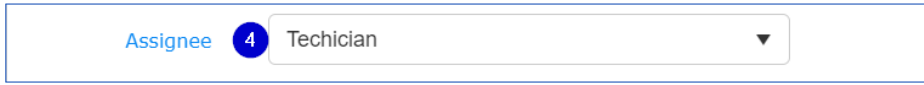
Add

Task Type 1 Document

Title 2 Work Authorization

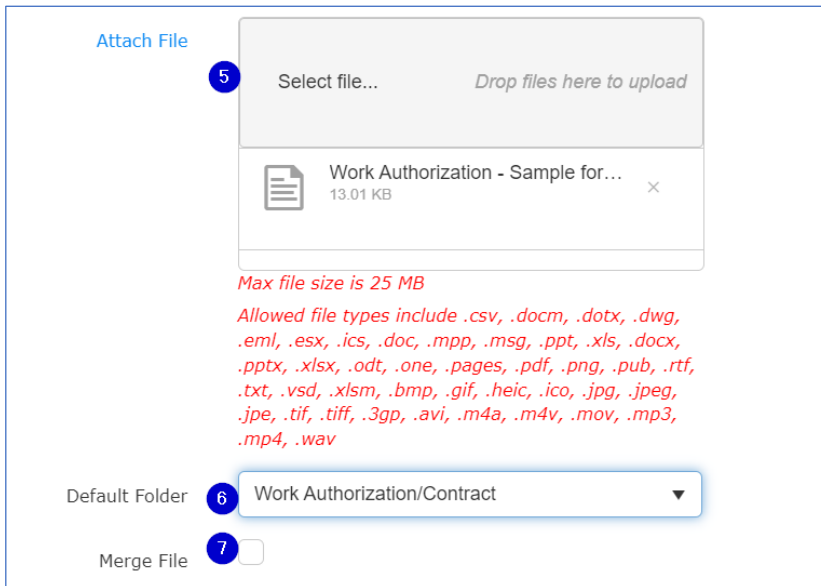
Description 3 Obtain client signature on Work Authorization prior to beginning work onsite.

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



Assignee 4 Technician

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.*



Attach File

5 Select file... Drop files here to upload

Work Authorization - Sample for... 13.01 KB

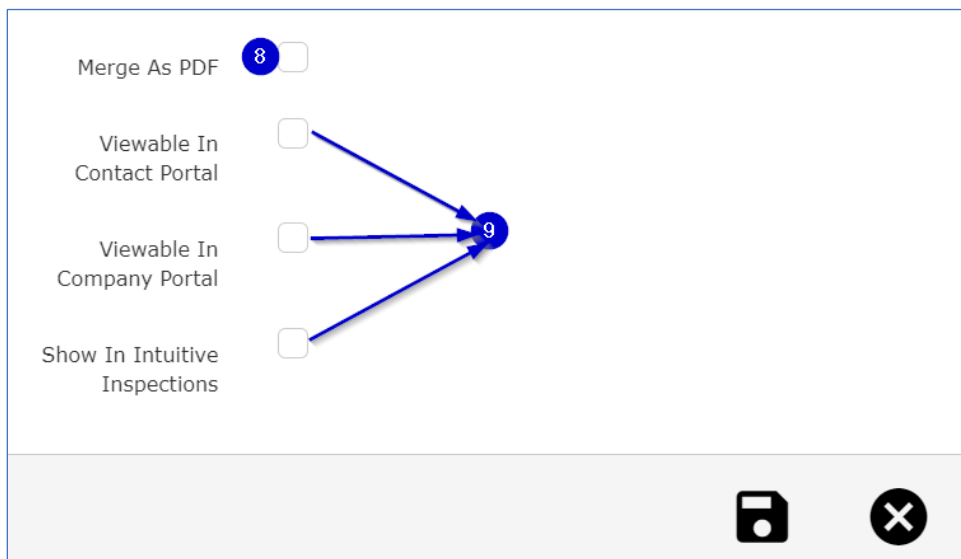
Max file size is 25 MB

Allowed file types include .csv, .docm, .dotx, .dwg, .eml, .esx, .ics, .doc, .mpp, .msg, .ppt, .xls, .docx, .pptx, .xlsx, .odt, .one, .pages, .pdf, .png, .pub, .rtf, .txt, .vsd, .xslm, .bmp, .gif, .heic, .ico, .jpg, .jpeg, .jpe, .tif, .tiff, .3gp, .avi, .m4a, .m4v, .mov, .mp3, .mp4, .wav

Default Folder 6 Work Authorization/Contract

Merge File 7

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.



Merge As PDF 8

Viewable In Contact Portal

Viewable In Company Portal

Show In Intuitive Inspections

9

Save Cancel

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

The screenshot shows a task configuration interface. At the top, there is a 'Warning' dropdown menu with a blue circle containing the number '10' next to it. Below this, there is a 'Save' button with a floppy disk icon and a blue circle containing the number '11' next to it. To the right of the 'Save' button is a close button with an 'X' icon.

Signed Document Task Type:

- Task Type: Select Task Type to Standard ****Required****
- Name: Input Name of Task ****Required****
- Description: Describe the task to be performed ****Required****

The screenshot shows the 'Edit' dialog box for a Signed Document task type. The dialog has a title bar 'Edit' and a close button 'x'. Inside, there are three fields: 'Task Type' with a dropdown menu set to 'Signed Document' (labeled with a blue circle '1'), 'Title' with a text input field containing 'COS' (labeled with a blue circle '2'), and 'Description' with a text area containing 'Obtain and provide the client with a signed Completion of Service documentation.' (labeled with a blue circle '3').

- Select date from pulldown to be automatically inserted into the Job Snapshot when this task has been marked completed.
- 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.
- 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.

The screenshot shows the task configuration interface for date and time settings. It includes a 'Set Date When Complete' dropdown menu (labeled with a blue circle '4') set to 'Select date...'. Below it are two input fields: '# of Days' (labeled with a blue circle '5') set to '0' and '# of Hours' (labeled with a blue circle '6') set to '0'. At the bottom, there is a 'Prev Dep' dropdown menu (labeled with a blue circle '6') set to 'Select previous dependency...'. Each input field has up and down arrow buttons.

- Assigned By: Select employee from pulldown that is assigning this task.
- Assignee: Select employee role on the job is to be assigned this task. ****Required****
- 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.
- 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.
- 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.

Assigned By **7**

Assignee **8**

Email Assignee **9**


Email Upon Completion To **10**

Email Upon Completion CC **11**

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.**

Attach File **12**

Drop files here to upload

 Document Example - Signed Docume...
11.84 KB ×

Max file size is 25 MB

Allowed file types include .pdf, .doc, .docx

Default Folder **13**

Merge As PDF **14**

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.

Viewable In Contact Portal

Viewable In Company Portal

Show In Intuitive Inspections

15

Warning **16**

17