



# PROVEN JOBS

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**ENCIRCLE  
INTEGRATION**

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## Table of Contents

Table of Contents.....	- 1 -
Introduction.....	- 2 -
Enable Integration Request.....	- 2 -
Bots (Public API) & Bearer Token Creation .....	- 2 -
Company Settings – Integration .....	- 4 -
Job Type Configuration.....	- 5 -
Job Type Configuration - Room Templates .....	- 6 -
Job Creation & Updating within PROVEN Jobs.....	- 7 -
Property Claims within Encircle .....	- 9 -
Proven Jobs Encircle Access .....	- 10 -
PROVEN Jobs Corresponding Contact Assignment in Encircle.....	- 10 -
PROVEN Jobs & Encircle Terminology Matrix .....	- 10 -
Company Settings - Sync Media.....	- 12 -
Company Settings – Delete.....	- 12 -
Company Settings – Photo and Document Path .....	- 13 -
Company Setting – Create Folders from Photo Labels.....	- 14 -
Photos and Documents.....	- 14 -
Note Sync .....	- 17 -

# PROVEN JOBS

## Introduction

**PROVEN Jobs** provides the ability for an API (Application Programming Interface) integration with Encircle. For General Contractors, Encircle provides a field documentation solution that is an easy-to-use tool for gathering and sharing the complete, accurate, and timely details of all jobs. To learn more about Encircle's product features, please visit <https://www.getencircle.com/>.

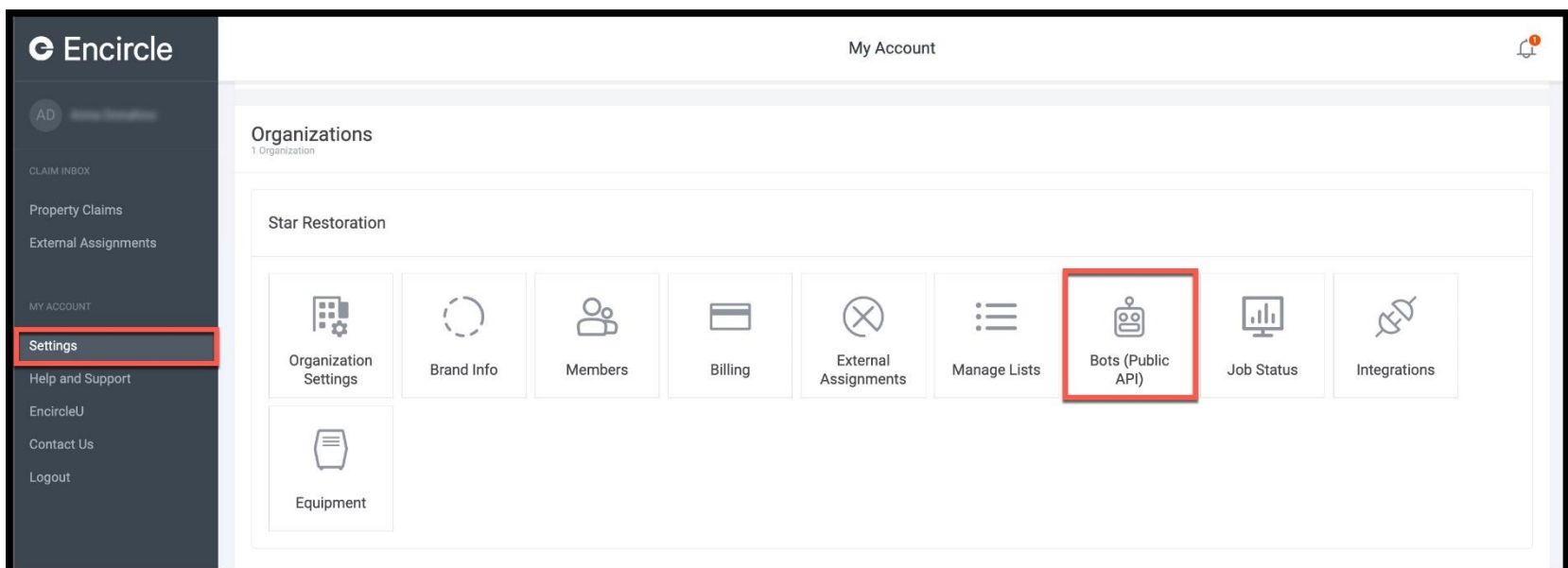
The integration component between **PROVEN Jobs** and Encircle allows users the ability to create a job within **PROVEN Jobs** and the job details will sync to Encircle Property Claims. Please be cognizant that this is a ONE-WAY sync of job information from **PROVEN Jobs** to Encircle. This feature is intended to reduce data duplication in which users historically had to update the two systems independently of another. *Throughout the 2021 - 2022 year, the CanAm Systems Development Team will have additional roll-out phases of the Encircle Integration.*

## Enable Integration Request

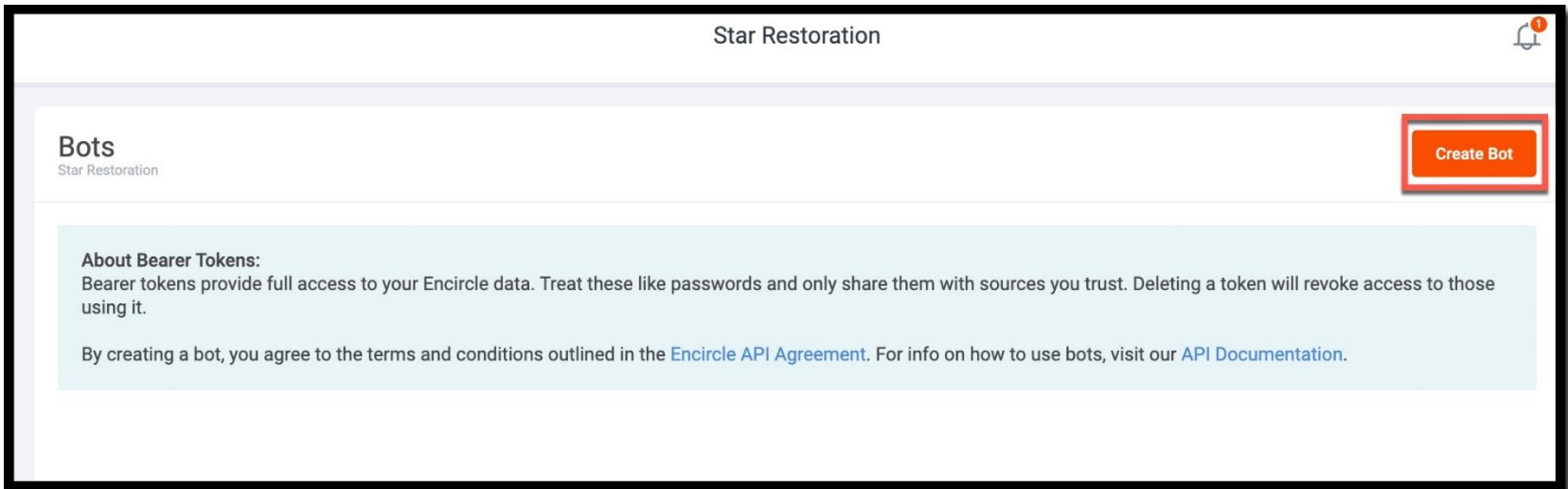
For users to have access to the Encircle Integration, a request must be submitted to [support@canamsys.com](mailto:support@canamsys.com).

## Bots (Public API) & Bearer Token Creation

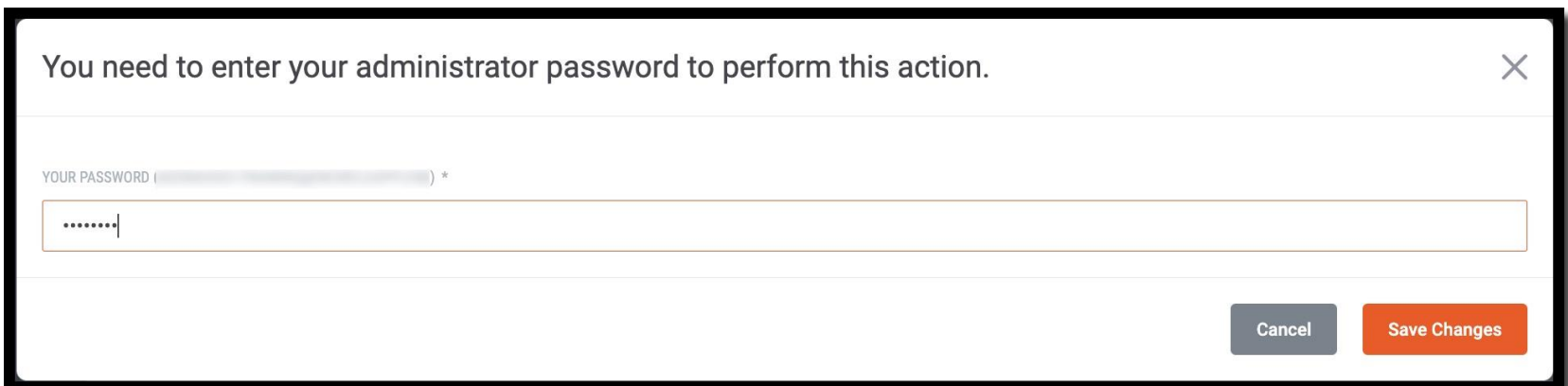
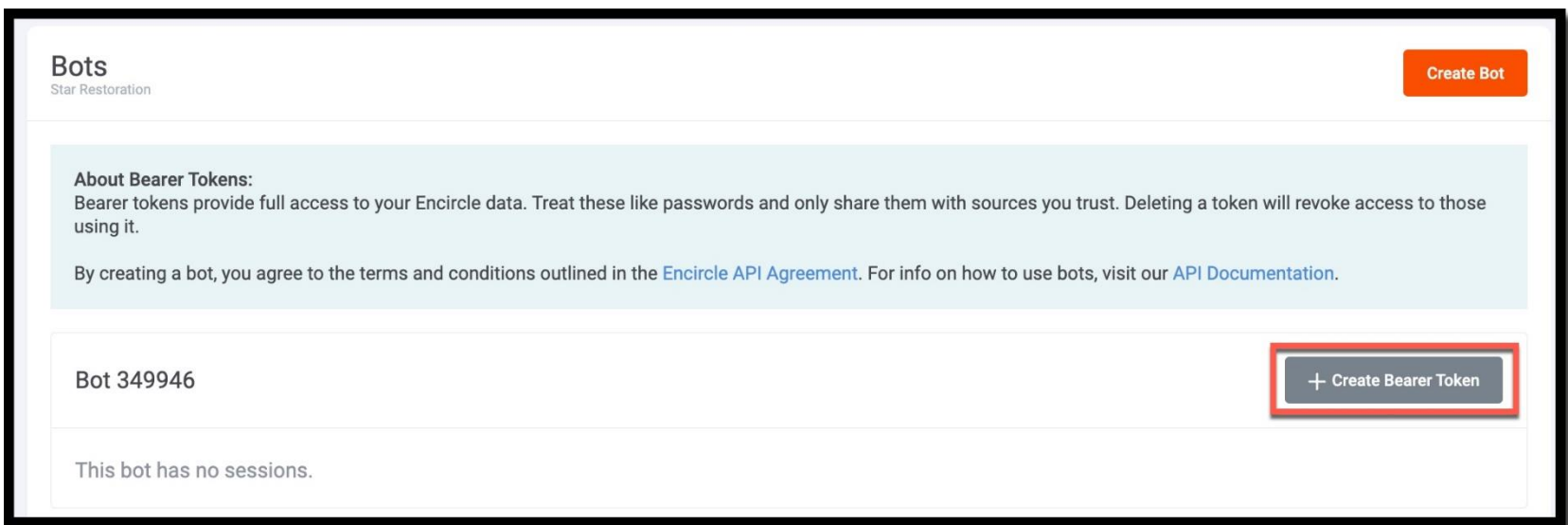
Creating a Bot is imperative to generate a bearer token that is necessary to add within **PROVEN Jobs** Company Settings to ensure a seamless integration between each software platform. To create a Bot and generate a bearer token, go to the Encircle app from the desktop by navigating to <https://encircleapp.com/app/property-claims> and logging in. Once logged in successfully, select Settings on the left-hand menu and then select the icon labeled Bots (Public API).



Within the Bots (Public API) menu option, select the orange button for "Create Bot". Once a new bot has been generated, a list of all created Bot identifiers will populate in a list view below.



For the Bot identifier this is intended to serve as the integration bridge between Encircle and **PROVEN Jobs**, select + Create Bearer Token. Once selected, the user will be prompted to enter their Encircle log-in credentials as this action requires Administrator rights and securities.



Once the Administrator has entered their log-in credentials, select Save Changes and an automated Bearer Token will be automatically generated on the user's behalf (Note: In the example below for privacy reasons, the Bear Token has been hidden).

**Bots**  
Star Restoration

[Create Bot](#)

**About Bearer Tokens:**  
Bearer tokens provide full access to your Encircle data. Treat these like passwords and only share them with sources you trust. Deleting a token will revoke access to those using it.

By creating a bot, you agree to the terms and conditions outlined in the [Encircle API Agreement](#). For info on how to use bots, visit our [API Documentation](#).

Bot 349946 [+ Create Bearer Token](#)

Session	Bearer Token	
Bot Session 1507774	[REDACTED]	

### Company Settings – Integration

Within **Settings** → **Company Settings** → **Integration**, navigate to the Encircle label and paste in the auto generated Encircle Bearer Token. Once any changes have been made within Company Settings, select Save. This action will activate the integration between Proven Jobs and Encircle.

**Contractor Connection**  
[+ Link](#)

**Symbility**

Region:  Account Number:  Passcode:

Category Regex:  Group:

Selector Regex:  Group:

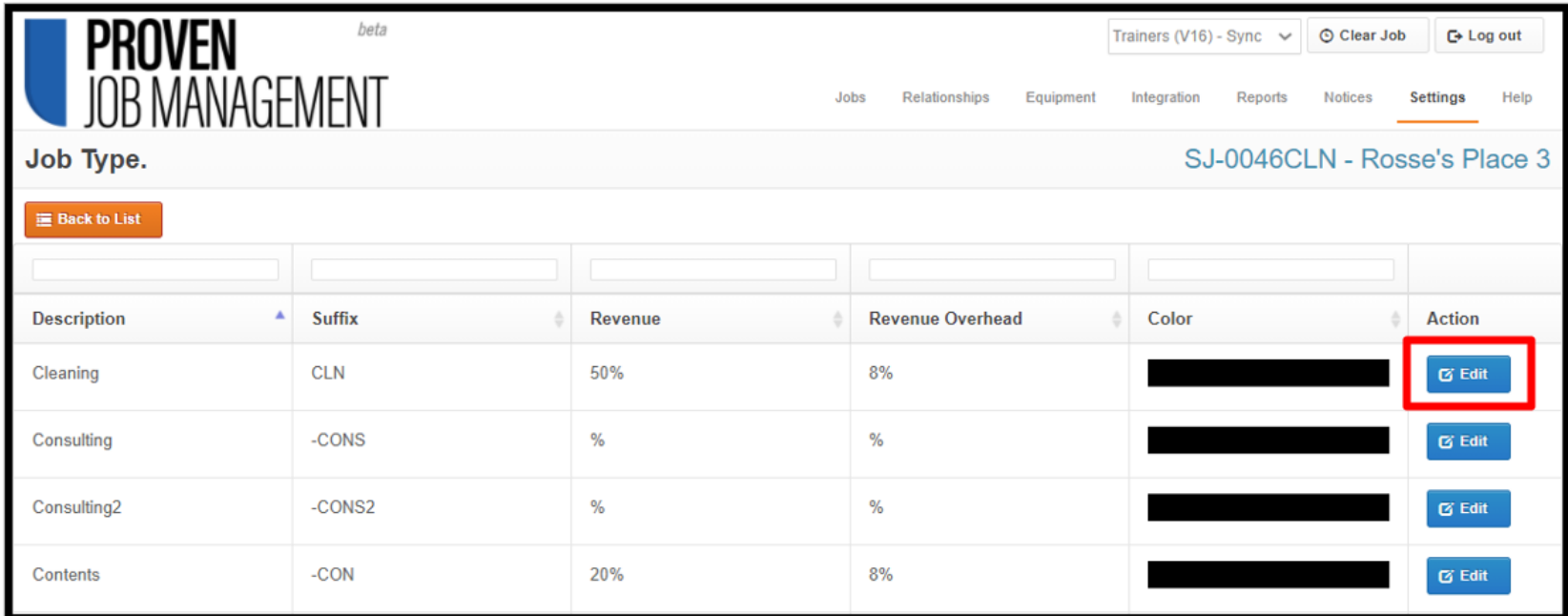
Import Overhead & Profit:

Import Material Tax:

**Encircle**  
AccessToken:

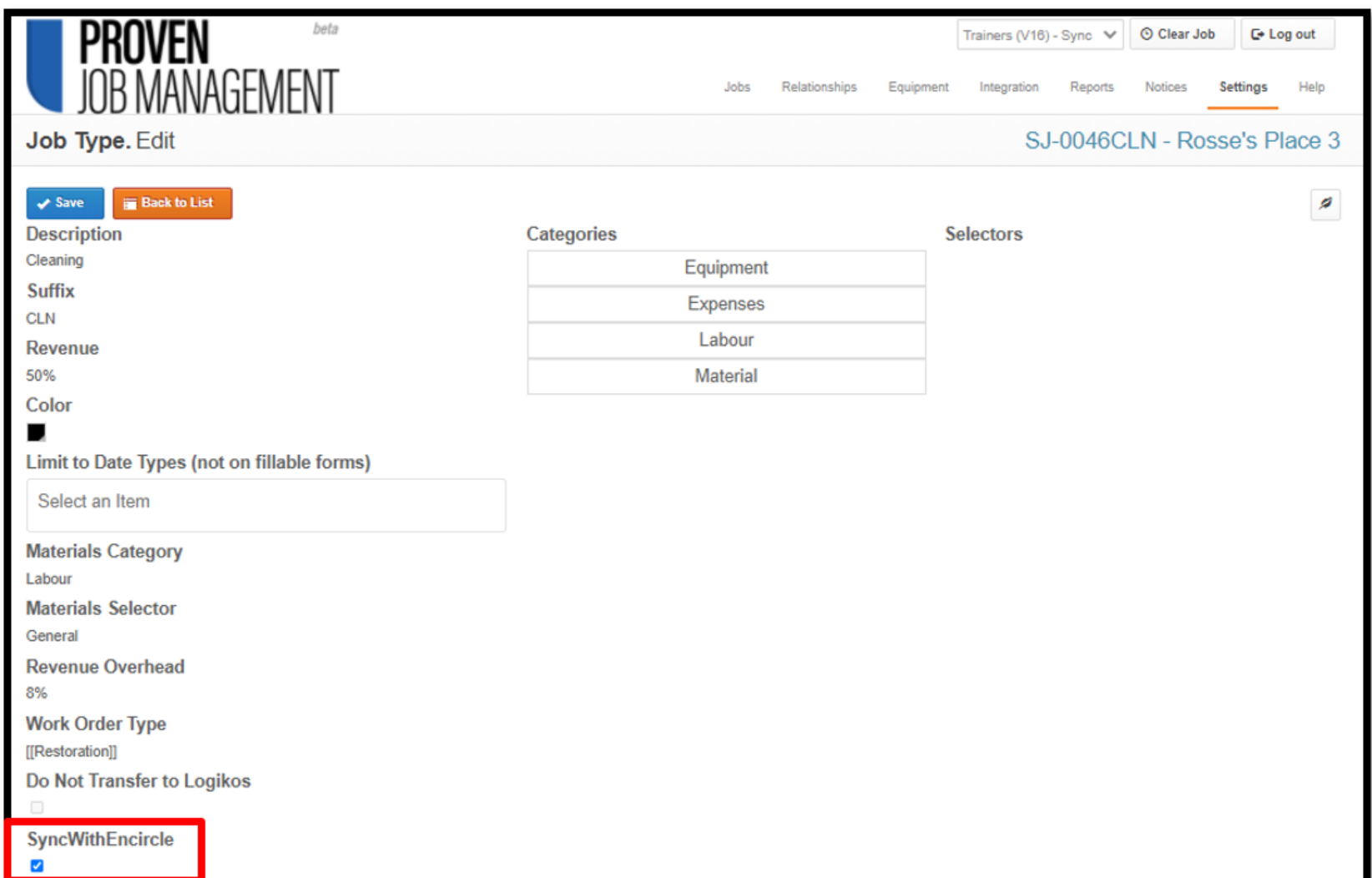
## Job Type Configuration

Within **Settings** → **Company Settings** → **Jobs** → **Edit Job Types**, select Edit next to each Job Type that is intended to sync to Encircle at the time of new job creation. If desired to sync ALL Job Types to Encircle, select Edit next to every Job Type within the database to enable the Encircle integration. Or, if desired to sync certain Job Types to Encircle but not all, select Edit next to the applicable Job Types only.



Description	Suffix	Revenue	Revenue Overhead	Color	Action
Cleaning	CLN	50%	8%	██████████	<input checked="" type="checkbox"/> Edit
Consulting	-CONS	%	%	██████████	<input type="checkbox"/> Edit
Consulting2	-CONS2	%	%	██████████	<input type="checkbox"/> Edit
Contents	-CON	20%	8%	██████████	<input type="checkbox"/> Edit

Once in Edit mode, click the checkbox selector for "Sync With Encircle" for each Job Type that is required to sync to Encircle at the job of new job creation or job updating/ re-saving. *Note: Jobs with the specified job types will not automatically sync to Encircle.*



**Job Type. Edit** SJ-0046CLN - Rosse's Place 3

Save  Back to List

Description: Cleaning

Suffix: CLN

Revenue: 50%

Color: █

Limit to Date Types (not on fillable forms):

Materials Category: Labour

Materials Selector: General

Revenue Overhead: 8%

Work Order Type: [[Restoration]]

Do Not Transfer to Logikos:

SyncWithEncircle

Categories: Equipment, Expenses, Labour, Material

Selectors: (empty)

## Job Type Configuration - Room Templates

Within Settings → Company Settings → Jobs → Edit Job Types, select Edit next to each Job Type that is intended to sync to Encircle this is the same process completed for Job Creation Set up. Within the Job Type Edit screen, users have the option to define the Room Template within Encircle on Job creation. When the job is created within Proven Jobs, upon sync the system will create the rooms defined within the “Encircle Room Template” within the linked Encircle file. The Template fields when entered are a free type field that are to be keyed by the user to sync to the Encircle Property Claims system. Type in the “Room Name” and hit enter. This will create the room in a blue icon within the Encircle Room Template section. At any given point should the need arise to eliminate the Room Template created, select the “X” to the correlating room to remove and select save. This will effectively remove the Room template from the job type and will not be available on the next job create utilizing that specific job type.

The screenshot displays the 'Job Type. Edit' interface for 'C-0538EMG - Carol Parker'. The left sidebar contains various configuration fields: Description (Emergency), Suffix (EMG), Revenue (50%), Color (black), Limit to Date Types (not on fillable forms) (dropdown), Materials Category (Labour), Materials Selector (General), Revenue Overhead (8%), Work Order Type ([[Restoration]]), Do Not Transfer to Logikos (checkbox), Sync With Moisture Mapper (checkbox), and SyncWithEncircle (checked). The main content area includes Categories (CLN, Direct Cost, DMO, Labour, WTR), Selectors, XactAnalysis Type Of Loss, and the Encircle Room Template section, which is highlighted with a red box and contains 'Bedroom X' and 'Bathroom X' tags.

**Note:** The room template feature can work in conjunction with the “Create folders from photos labels” if the user selects to utilize.

## Job Creation & Updating within PROVEN Jobs

When creating a job within **PROVEN Jobs**, if the specific Job Type has been defined within the Company Settings to sync with Encircle. Users will need to select the **“Encircle”** option on job creation. At the time of saving the newly created job newly created job information will sync to Encircle, along with the room template if defined, as long as **“Encircle”** has been selected on the intended job file.

**Jobs. Create** 1056-WTR - Ray Stark

### Search

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**Customer/Property**  **Caller Name**  **Caller Type**

**Name**  **Address**  **City**  **State**  **Zip**  **County**

**Job Type**  **Job Subtype**  **Location**  **Building Type**  **Team**

**Referral Source**  **Referral Company**  **Referral Contact**  **Loss Description**

**Administrator**  **Estimator**  **PM Assistant**  **Inspector**  **Salesperson**

**Urgency**  **Year Built**  **Effectuated Levels**  **Note**   
**Contact Info**

**Encircle**



If a job was not selected on job creation, a user has the option to select the Encircle option after job creation within the Job Info tab at a later date. This will enable the user to sync to Encircle when the need arises.

The screenshot displays a software interface with a top navigation bar containing tabs: Info, Dates, Relationships, Notes, Timeline, Attachments, Schedule, Workflow, Materials, Financials, Equipment, Work Orders, and Sketch. Below this is a secondary bar with 'Custom Fields', 'Moisture Mapper', and 'Encircle'. The main content area is titled 'Loss Description' with a sub-header 'Sprinkler head'. It features a grid of input fields for various job details. At the bottom left, the 'Encircle' checkbox is highlighted with a red border. The fields are organized as follows:

Field	Value
Number	1056
Name	Ray Stark
Customer	Ray Stark
Caller Name	
Caller Type	Select an Item
Job Type	Emergency Water
Job Subtype	Search for Items
Location	Corporate
Building Type	Residential
Team	Search for Items
Encircle	<input type="checkbox"/>
Attention	
Address	915 Shoreline Drive, Apartment 12 B
City	Sunset Beach
State	NC
Zip	28468
County	
Country	Canada
Contact Info	
Project Number	
Completed Percent	0.00
Policy Holder	Search for Items
Policy Number	
Revenue Percent	60.00
Claim Number	
Deductible	0.00
Secondary Claim Number	
PO Number	
Referral Source	Insurance Company
Estimated Revenue	\$0.00
Urgency	Select an Item
Year Built	
Property Company	Search for Items
Effectuated Levels	Select an Item
Alternative Status	7-Approved
Lost Code	

If a job was imported from an XactAnalysis assignment, the newly created job information will sync to Encircle, along with the room template if defined, as long as “Encircle” has been selected on the intended job file.

If new information is added to a defined Job Type that syncs to Encircle at a later date/time other than at the time of new job entry (i.e., Claim Number, Phone Number, XactAnalysis ID, etc.), once the job is saved, that will force an update and a sync of new information to the existing Property Claim within Encircle. **Note:** if a Job Type is modified after the Job is created within Encircle, the system will “not allow” the job type to be edited as it has already been synced to Encircle.

## Property Claims within Encircle

Once a new job has been created and saved within **PROVEN Jobs**, the job details will sync to Encircle Property Claims → Claim Details.

### Claim Details

CARRIER IDENTIFIER	CONTRACTOR IDENTIFIER	ASSIGNMENT IDENTIFIER	TYPE OF LOSS
09432813	H-0050CLN	-	Cleaning
PROJECT MANAGER	DATE OF LOSS	DATE CLAIM CREATED	CAT CODE
Ben Anderson	May 19, 2021	May 19, 2021	-
INSURANCE COMPANY	POLICY NUMBER	ADJUSTER	BROKER / AGENT
USAA	890194	Nate Larkin	Taylor Weathers
CLAIM SUMMARY			
PJM Loss Description Note Topic Syncs Here			

Additionally, "Rooms" defined within Room Template on the associated job type are created upon sync.

Property Claims Carol Parker - C-0538EMG

Rooms 2 Rooms

Reorder Rooms Add Structure Add Rooms

Bedroom

0 Photos

Open Room

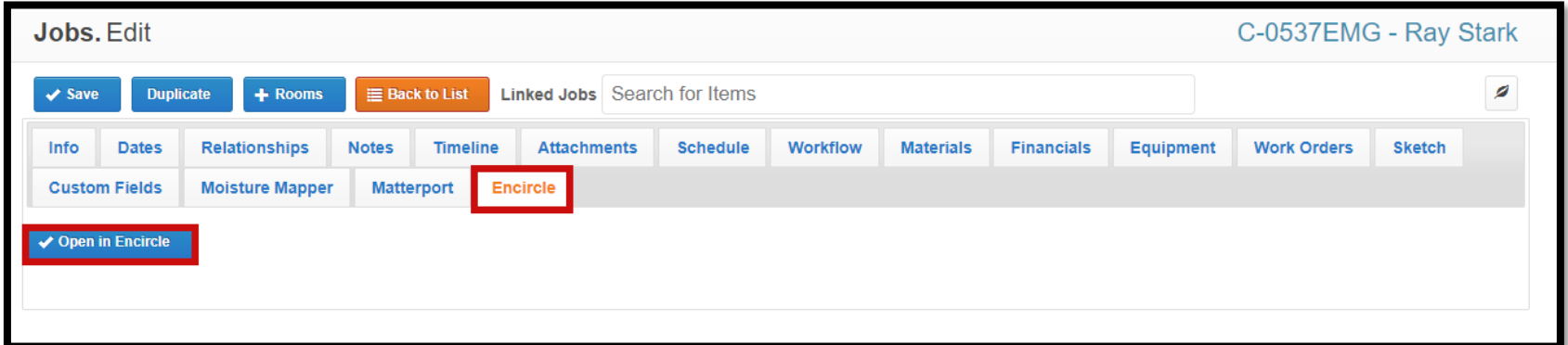
Bathroom

0 Photos

Open Room

## Proven Jobs Encircle Access

Once a new job has been created and saved within PROVEN Jobs, an Encircle tab will appear. Within this tab users have the option to "Open in Encircle". For ease of access, upon selection the user will be taken to the linked Encircle job.



## PROVEN Jobs Corresponding Contact Assignment in Encircle

Within Settings → Company Settings → Integration → Encircle, users can define which associated PROVEN Jobs Contact Type to assign to the corresponding Encircle Contact Types. Users can select from the drop-down menu options to assign.



## PROVEN Jobs & Encircle Terminology Matrix

If users do not wish to utilize the **PROVEN Jobs** manual assignment of Contact Types outlined above to the corresponding Encircle Type, PROVEN Jobs will auto select the original assigned default Marketing Role Positions listed below.

To better understand the **PROVEN Jobs** terminology that syncs to the corresponding Encircle fields IF NOT SELEECTED, please reference the label matrix below. Also included are the corresponding Marketing and Role positions that sync to Encircle in the event that the **PROVEN Jobs** Administrator has changed the default description labels.

Proven Jobs	Proven Jobs Marketing & Role Position	Encircle
Adjuster	Marketing Position 2	Adjuster
Agency Office	Marketing Position 3	Broker/Agent
Claim Date		Date Claim Created
Claim Number		Carrier Identified
Insurance Office	Marketing Position 1	Insurance Company
Job Address		Address
Job Name		Policyholder Name
Job Number		Contractor Identifier
Job Type		Type of Loss
Loss Date		Date of Loss
Loss Description		Claim Summary
PM		Project Manager
Policy Number		Policy Number
Transaction ID		Assignment Identifier

Note: Within Proven Jobs, the FIRST contact number that gets entered (i.e., Mobile, Home, Work) or the FIRST email address that gets entered (i.e., Home, Work) will sync to Encircle.

**Contact Info** + 📍

Home Phone 📞 770-404-1234 -

Mobile Phone 📞 494-265-0003 -

Home Email ✉️ test1@gmail.com -

Work Email ✉️ test2@gmail.com -

**Proven Jobs**

**Sammy Knox**

✉️ test1@gmail.com

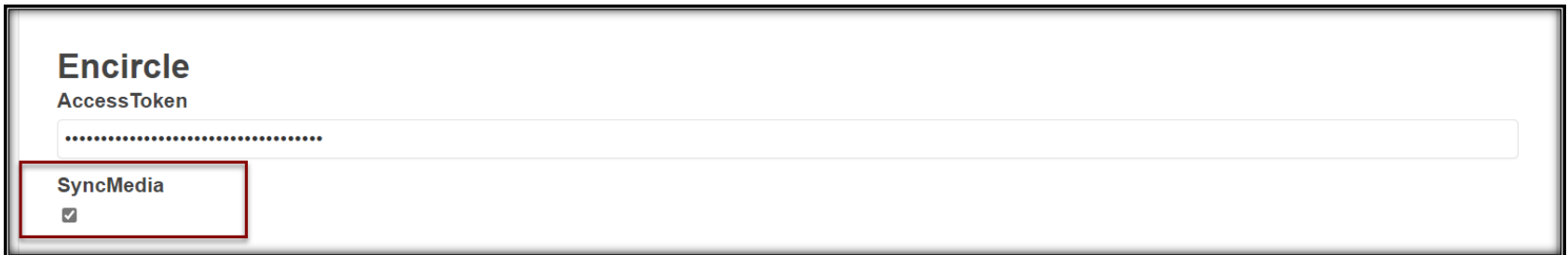
📍 4979 Main Street, Holly Springs, GA 30115, USA

📞 (770) 404-1234

**Encircle**

## Company Settings - Sync Media

In order to enable the photos, or documents to sync from Encircle to **PROVEN Jobs**, the following needs to be enabled in **PROVEN Jobs** Company Settings. Within **Settings** → **Company Settings** → **Integration** → Scroll down to Encircle, make sure that Sync Media option has been checked. This will allow photos and documents from Encircle to sync to the linked **PROVEN Jobs** job file. *Please note that sync time can be a max of 30 minutes to sync from Encircle to Proven Jobs, however our Proven Solutions development team is consistently working on minimizing this sync time.* Sync is currently a one-way sync from Encircle to **PROVEN Jobs**.



The screenshot shows the 'Encircle' integration settings. It includes a section for 'Access Token' with a masked input field. Below this, the 'SyncMedia' option is checked, indicated by a small square checkbox. A red rectangular box highlights the 'SyncMedia' label and its checkbox.

## Company Settings – Delete

Within **Settings** → **Company Settings** → **Integration** → **Encircle** users have the option to decide if items have been deleted within Encircle, should be deleted within the linked **PROVEN Jobs** Job File. To allow this deletion, be sure to select 'Remove items deleted in Encircle'. This will ensure that items such as photos, documents, notes, etc. that are deleted within Encircle are also deleted within the linked **PROVEN Jobs** job file. *Note: notes, photos or documents that have been marked public and linked to a Third-Party Administrative platform such as XactAnalysis or Symbility will not be able to be deleted.*



The screenshot shows the 'Encircle' integration settings. It includes a section for 'Access Token' with a masked input field. Below this, the 'Sync Media' option is checked. At the bottom, the 'Remove items deleted in Encircle' option is also checked, and this entire section is highlighted with a red rectangular box.

## Company Settings – Photo and Document Path

Additionally, users also have the option to define a Photo and/or document path within the linked **PROVEN Jobs** job file to determine where the synced photos and/or documents will import to when synced. Navigate to **Settings → Company Settings → Integration → Encircle** and select options to Import Photos and Import Documents, users will need to determine the naming convention of the specific Photo and Document folder. At the present time this option only allows linking to one specified folder path.

**Encircle**

AccessToken  
.....

Sync Media

Remove items deleted in Encircle

Import Photos <input checked="" type="checkbox"/>	Photo Path Encircle Photos
Import Documents <input checked="" type="checkbox"/>	Document Path Encircle Documents

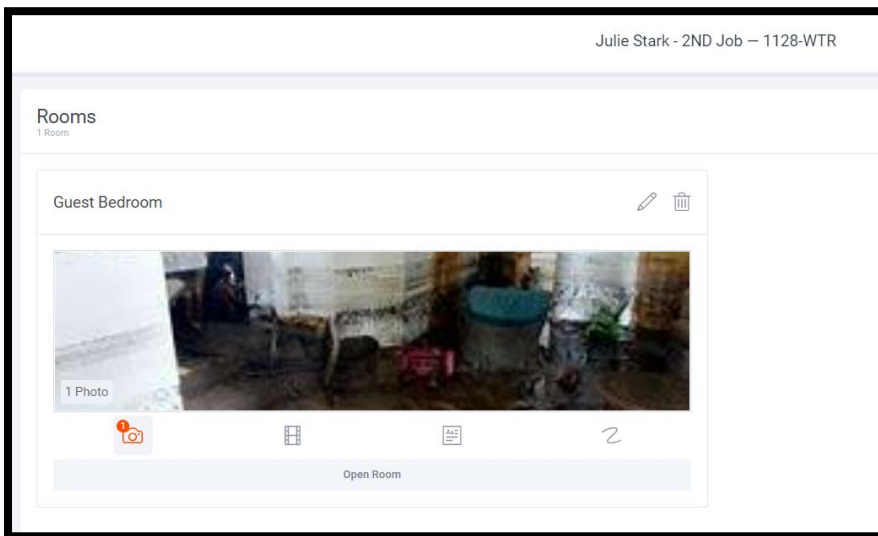
## Company Setting – Create Folders from Photo Labels

Within **Settings** → **Company Settings** → **Integration** users also have the option to choose to create Folder from photos that are placed within Rooms within Encircle within Proven Jobs.



If selected, when a photo is placed within the Room in the linked Encircle job file, when synced to Proven Jobs system, a directory/file will be created from the "Room Name" from Encircle.

## Encircle Rooms Created and pictures placed in the Rooms



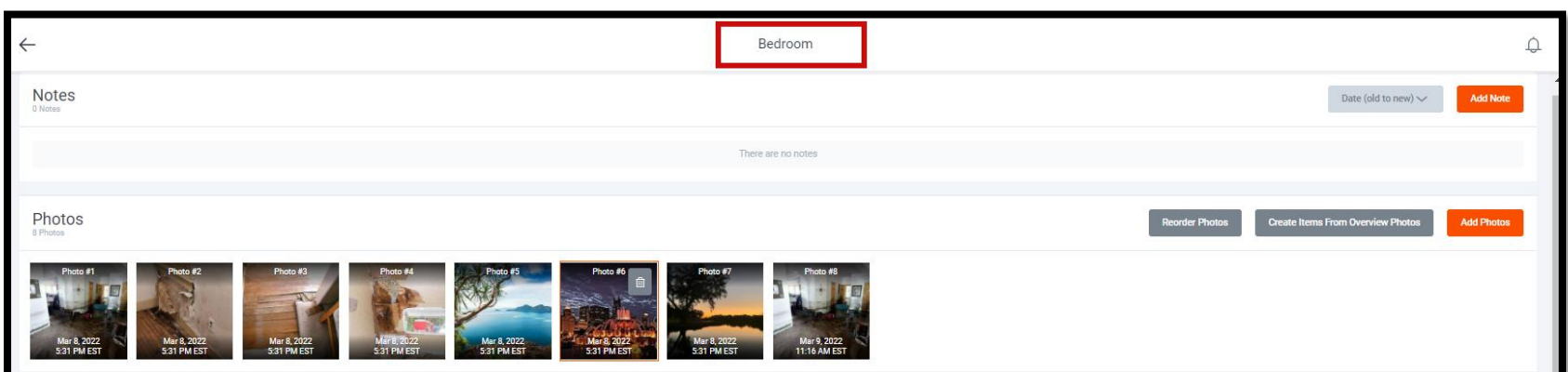
**File / Directory Created in Proven Jobs**



## Photos and Documents

Once the Photo or Document has been uploaded into Encircle. It will automatically sync to the linked **PROVEN Jobs** job file. *Note: Photos that are housed within a created Room Template from PROVEN Jobs sync will automatically take on the associated room name when syncing to PROVEN Jobs. \* Unless users chose the selection of Create Folders from Photo Labels*

## Photos: Encircle to PROVEN Jobs One-Way Sync



## Sync to PROVEN Jobs from Encircle

The photos will be visible within the main Attachments tab and within the main folder of the images section within the associated job file.

The screenshot shows the 'Jobs. Edit' interface for job 'C-0537EMG - Ray Stark'. The 'Attachments' tab is active, displaying a grid of seven image thumbnails. Each thumbnail has an 'Edit' link below it. The first thumbnail, showing a sunset over water, is highlighted with a red box. Below the thumbnails, the text 'Main Building-Bedroom\_2858325' is repeated for each image. The interface includes various navigation buttons like 'Save', 'Duplicate', 'Rooms', 'Back to List', and 'Search for Items'. There are also filters for 'All', 'Images', 'Videos', 'Documents', 'Reports', 'Forms', and 'Merge Docs'. A search bar and a 'Files Total In Job: 7' indicator are also visible.

## Documents: Encircle to PROVEN Jobs One-Way Sync

Documents uploaded to Encircle will sync to the associated **PROVEN Jobs** job file and flow into the attachments tab to the documents section.

The screenshot shows the 'Daily Summary' interface for Wednesday, Mar 2, 2022. The 'Documents' tab is highlighted with a red box. The interface displays a list of documents and photos. The first document is 'Excel Report - Tea Room' (xlsx) generated by Dmitry Zaslavsky at 12:44 PM. The second document is 'Encircle Document 01' (docx) uploaded by Dmitry Zaslavsky at 12:37 PM. Below the documents, there is a section for 'PHOTOS' showing a photo named 'dining1.jpg' uploaded at 12:37 PM. The interface includes a search bar, filters for 'All', 'Photos & Videos', 'Sketches', 'Notes', 'Documents', 'Moisture', and 'Items'. There are also filters for 'DATE RANGE', 'ROOMS' (Downstairs, Tea Room), and 'PEOPLE' (Dmitry Zaslavsky).



## Sync to PROVEN Jobs from Encircle

**Jobs. Edit** C-0534CLN - Jack Beans

Save  Duplicate  + Rooms  Back to List Linked Jobs

---

Info Dates Relationships Notes Timeline Attachments Schedule Workflow Materials Financials Equipment Work Orders Sketch

Custom Fields Moisture Mapper Matterport Encircle


---

All Images Videos Documents Reports Forms Merge Docs


Name

Files Total In Job: 7 Limit To: 25 Order By: Created Old to New


---



Encircle Document 01



Moisture Summary Report - C-0534CLN.pdf



Excel Report - Tea Room\_330510.xlsx

## Note Sync

Notes created within Encircle, regardless of if it is created within a room, or within the general notes section of Encircle will sync to the linked **PROVEN Jobs** file. This sync is an automatic one-way sync from Encircle on note creation.

## Note Created in Encircle

The screenshot shows a 'Day 2 - Today' summary in Encircle. It lists three notes added by Dmitry Zaslavsky (DZ):

- Equipment on Site** (Just now): Left 3 Air Movers & 2 Dehus.
- Vinyl Flooring - Bathroom** (Just now): Checked vinyl flooring for moisture, moisture content is still above normal recommended levels. 1 Additional day of drying recommended.
- Moisture Readings** (2 minutes ago): Obtained moisture readings, set equipment, and obtained signed work authorization from insured.

## Note Synced to PJM

Notes synced from Encircle will be visible within the Notes tab, with the note topic of "Encircle".

The screenshot shows the 'Jobs' interface for 'C-0537EMG - Ray Stark'. The 'Notes' tab is selected, and a table lists notes synced from Encircle. The 'Topic' column for the first three notes is highlighted with a red box.

Created	Employee	Topic	Email Recipients	Subject	Note	Visibility	Action
3/9/2022 2:00 PM	Mary-Anne Markle	Encircle		Main Building - Bathroom - Vinyl Flooring - Bathroom	Checked vinyl flooring for moisture, moisture content is still above normal recommended levels. 1 Additional day of drying recommended.	Private	<a href="#">Edit</a> <a href="#">Delete</a>
3/9/2022 1:59 PM	Mary-Anne Markle	Encircle		Main Building - Bedroom - Moisture Reaadings	Obtained moisture readings, set equipment, and obtained signed work authorization from insured.	Private	<a href="#">Edit</a> <a href="#">Delete</a>
3/9/2022 2:00 PM	Mary-Anne Markle	Encircle		Equipment on Site	Left 3 Air Movers & 2 Dehus	Private	<a href="#">Edit</a> <a href="#">Delete</a>
3/8/2022 5:31 PM	Sync System	Encircle		Loss Note	Loss Note - Inspection Note , met with insured	Private	<a href="#">Edit</a> <a href="#">Delete</a>
3/8/2022 5:27 PM	Christy Ragone	Loss Description		Loss Description	Flooded bathroom and hallway	Private	<a href="#">Edit</a> <a href="#">Delete</a>

Showing 1 to 5 of 5. Limit To: 10 | First | Previous | 1 | Next | Last