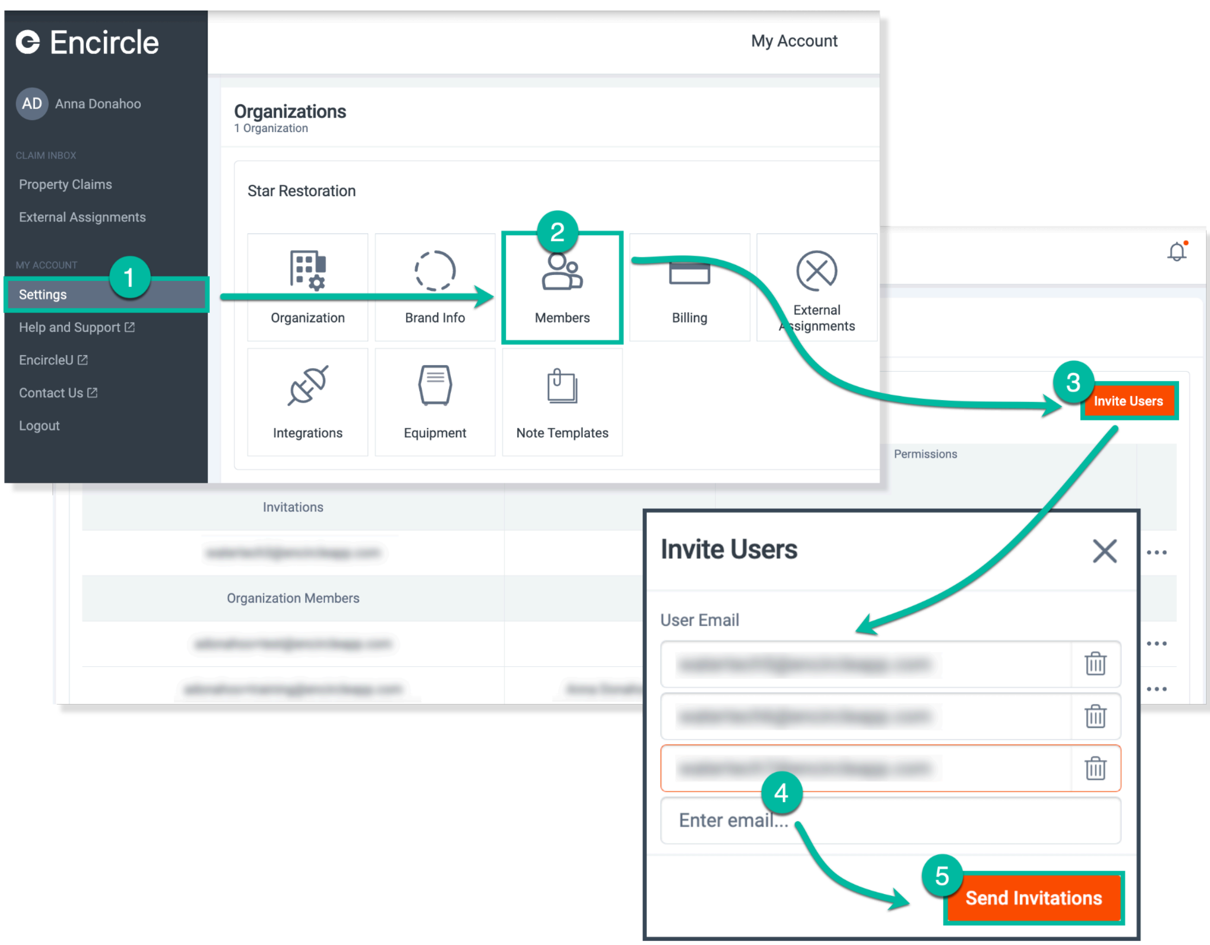
JOB DOCUMENTATION - CHEAT SHEET

ADDING USERS TO YOUR ACCOUNT

*****This must be done by an admin user for the org via the Encircle Web App*.**

1. Click Settings on the left hand menu.
2. Select the Members tab.
3. Click Invite Users **Invite Users** on the top right.
4. Enter the email addresses of whoever you wish to invite.
5. Click Send Invitations.

***Your staff will receive email invitations to download the app and create a login.**



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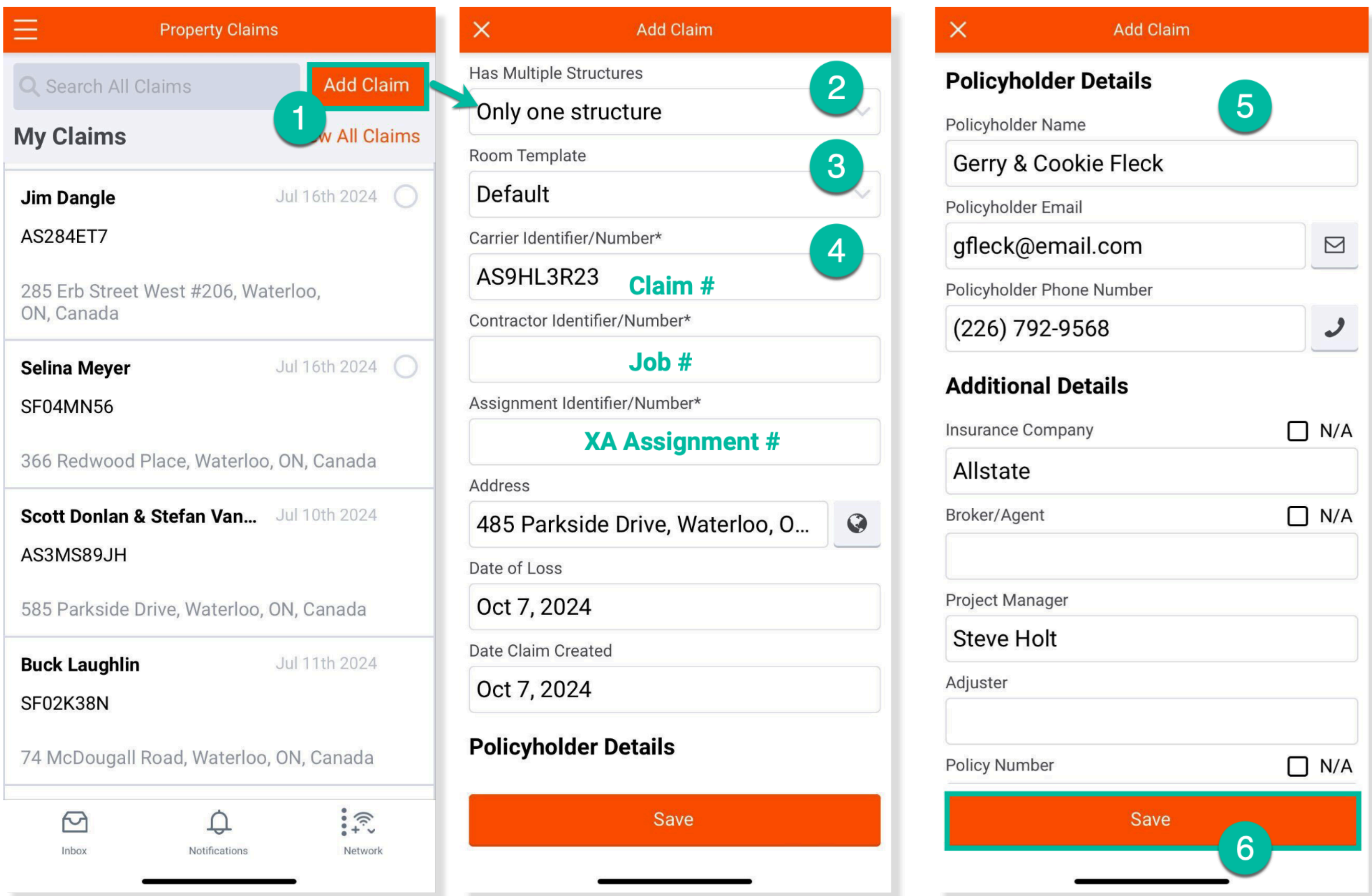
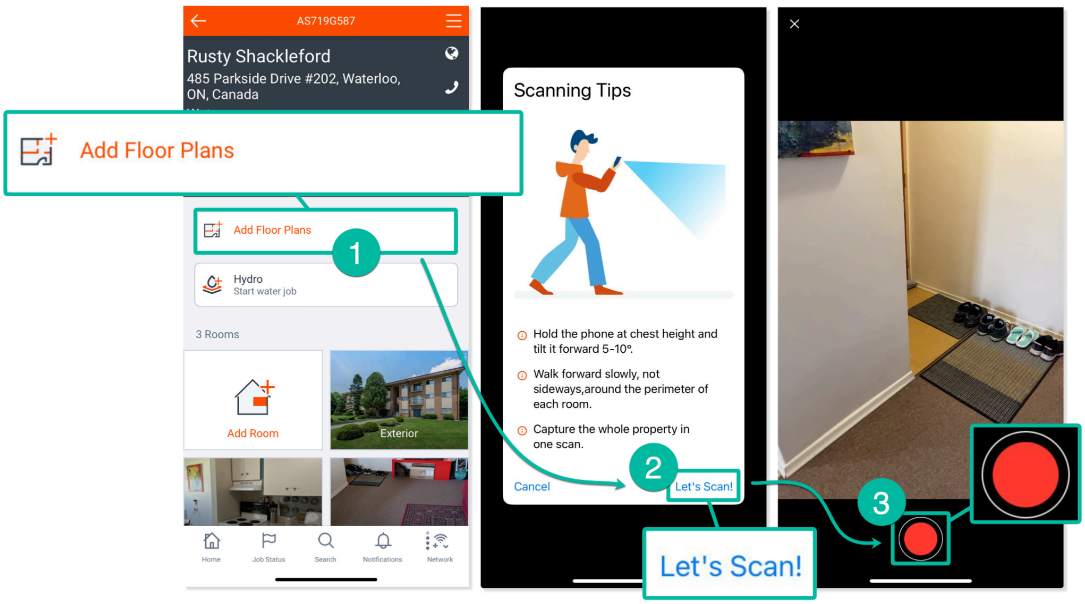
ADDING A CLAIM

1. Click Add Claim to open a new job file if one has not already been started by someone else.
2. For a residential property, leave the claim as only one structure (one building/unit). If the property has multiple units, buildings, etc, select multiple structures.
3. If your org has set up custom room templates, you can select a template. Otherwise leave this alone.
4. Enter at least one of the claim identifier fields:
    a. Carrier Identifier: insurance claim number
    b. Contractor Identifier: company job number
    c. Assignment Identifier: XactAnalysis assignment number
    d. **If you don't know the claim/job number, just enter something basic like a customer name. These fields can be updated later.*
5. Fill out any other details that you have such as address, policyholder name, type of loss, etc.
6. Click Save.

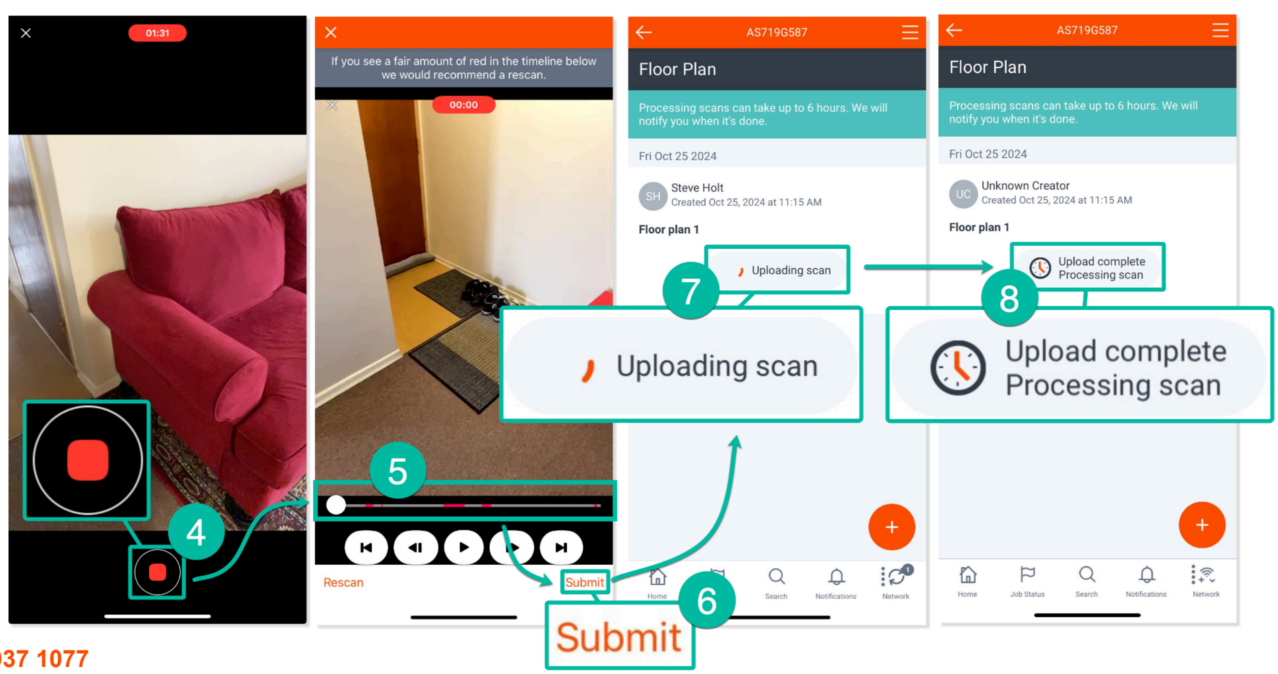


ADDING A FLOOR PLAN

1. From the home page of the claim, tap Add Floor Plans.
2. Read our scanning tips and tap Let's Scan.
3. Tap the red record button 🔴 to start your scan.



4. Tap the **stop button** to end the scan.
5. Review your scan before submitting.
6. When you're ready to submit your scan, tap Submit.
7. Your scan video will need to finish uploading before processing. Best to leave the app open while it syncs.
8. You will see a notice that your scan is processing, which may take up to 6 hours. You will receive an email when your scan has finished processing. Note that if you captured your scan in offline mode, you will need to reestablish a connection before your scan begins to process.



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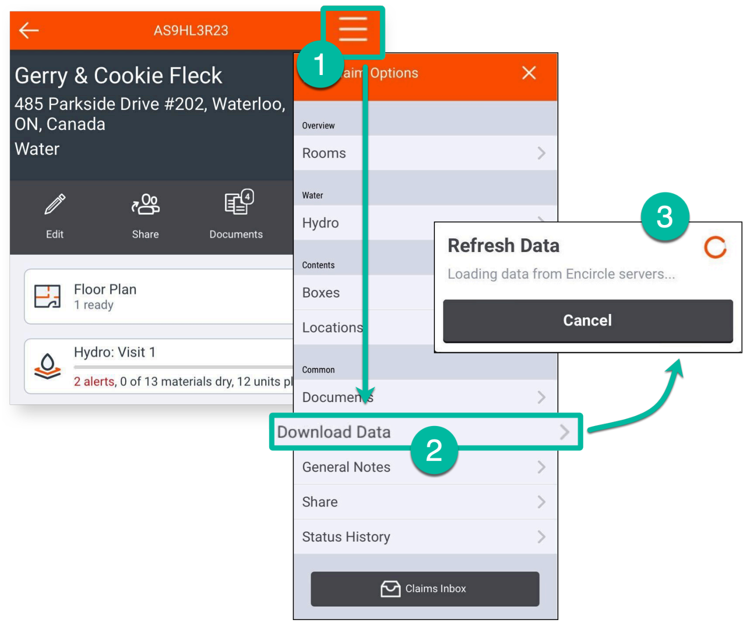
DOWNLOADING CLAIM DATA

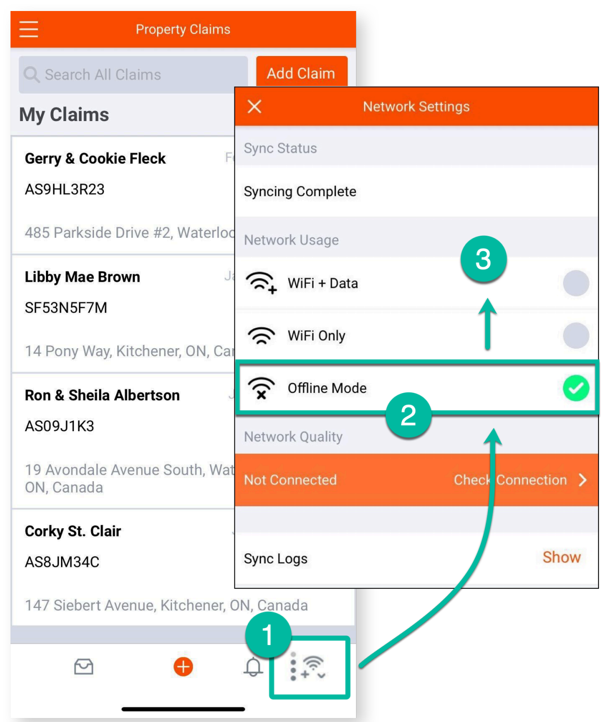
1. Tap the 3 bars
2. Select Download Data to fetch all the latest data from the claim, so you have the most up-to-date info on the job before going out on site.

   Do this every day before going into offline mode so you can be as up-to-date as possible.



WORKING OFFLINE

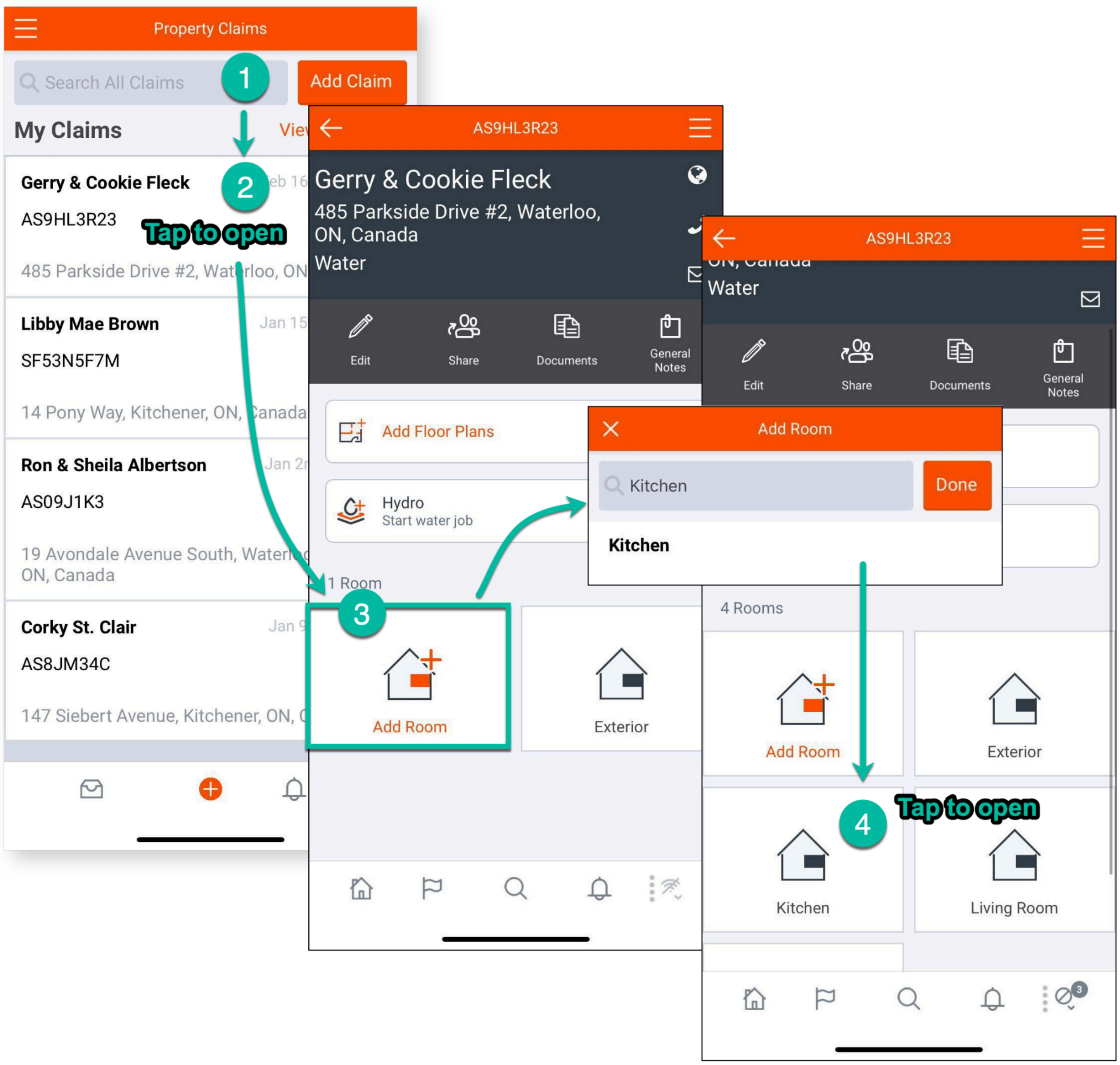
1. Tap the Network Settings button
2. Select Offline Mode to save battery and prevent the app from using the internet.
3. When you return to a place where you have service, switch back to Wifi or Wifi + Data mode and let the app sync all of your photos, notes, etc. from the day.



SETTING UP THE CLAIM

1. From the claim inbox, search by customer name, address, or claim number to find the claim. If a claim doesn't exist, tap the Add Claim 

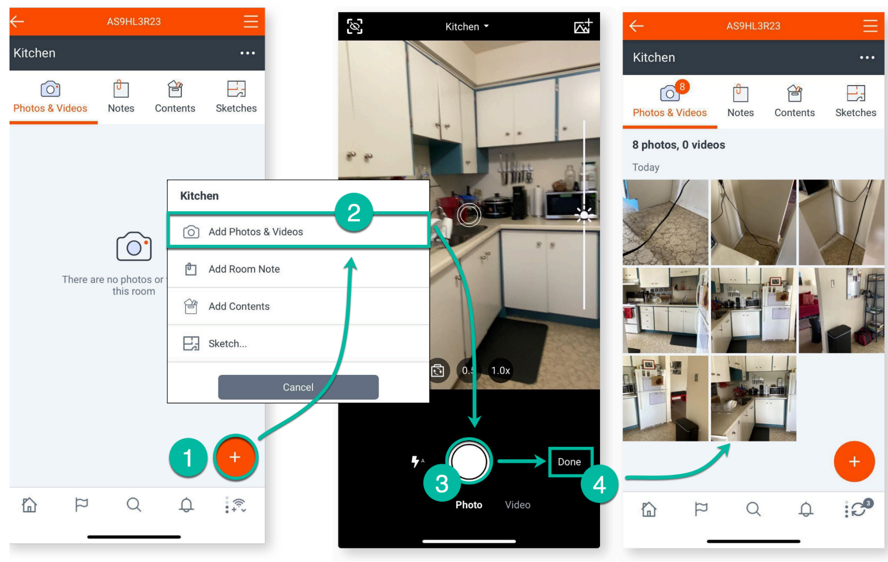
button and fill out the claim details.
2. Tap on the claim to assign yourself to it and open it up.
3. Tap Add Room to create a folder for documenting the room. Repeat for each affected room.
4. Tap on the room you'll be working out of.



ADDING ROOM PHOTOS & VIDEOS

Start with room overview photos/videos.

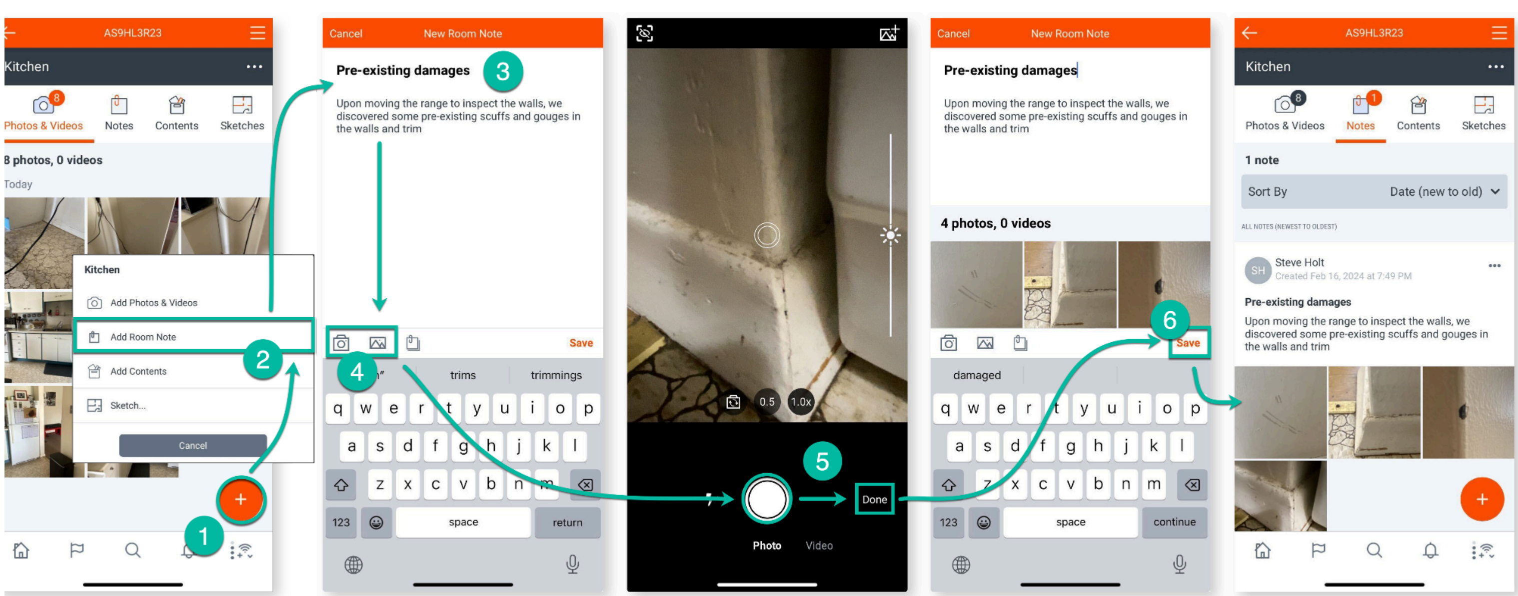
1. Tap the + button.
2. Select Add Photos & Videos
3. Use the white capture button to snap photos or videos. Keep the floor and ceiling in view. Repeat until you have a 360° view of the room.
4. Tap Done when finished.



ADDING ROOM NOTES

Next, add your close-up photos like “structural damage”, “source of loss”, “pre-existing damage”, etc.

1. Tap the + button.
2. Select Add Room Note.
3. Enter a title and/or description for your note or tap the note template icon to use a pre-filled template.
4. Select one of the media options to add photos, videos, or upload media.
5. Use the white capture button to snap photos or videos and tap Done.
6. Tap Save.



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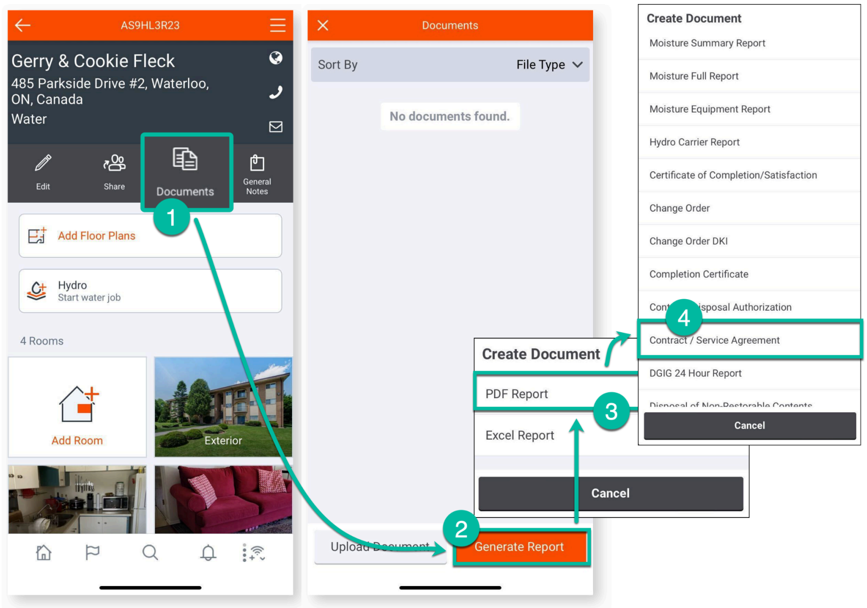
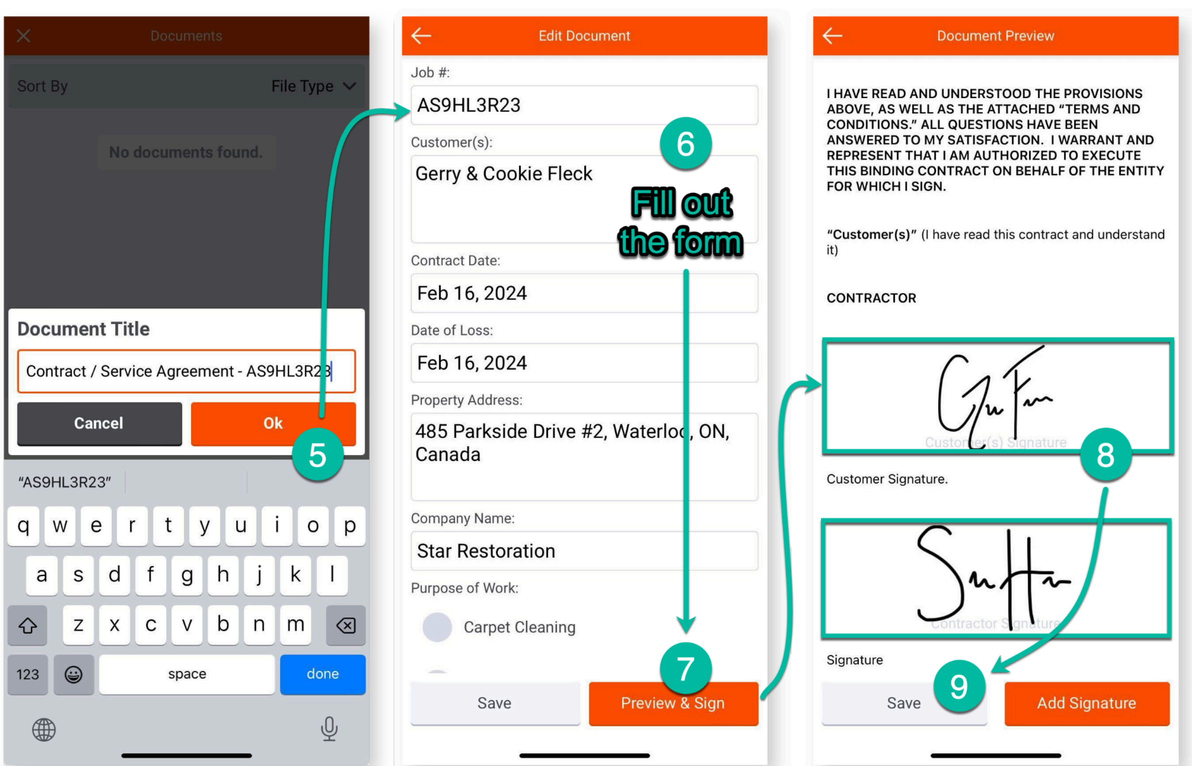
GETTING A DOCUMENT SIGNED

Get the policyholder to digitally sign your paperwork (contracts, work auths, COC's, etc). [Click here] to submit your forms to us for digitization.

1. From the home page of the claim, tap Documents.
2. Tap Generate Report.
3. Select the PDF Report type.
4. Choose the form from your list of documents.



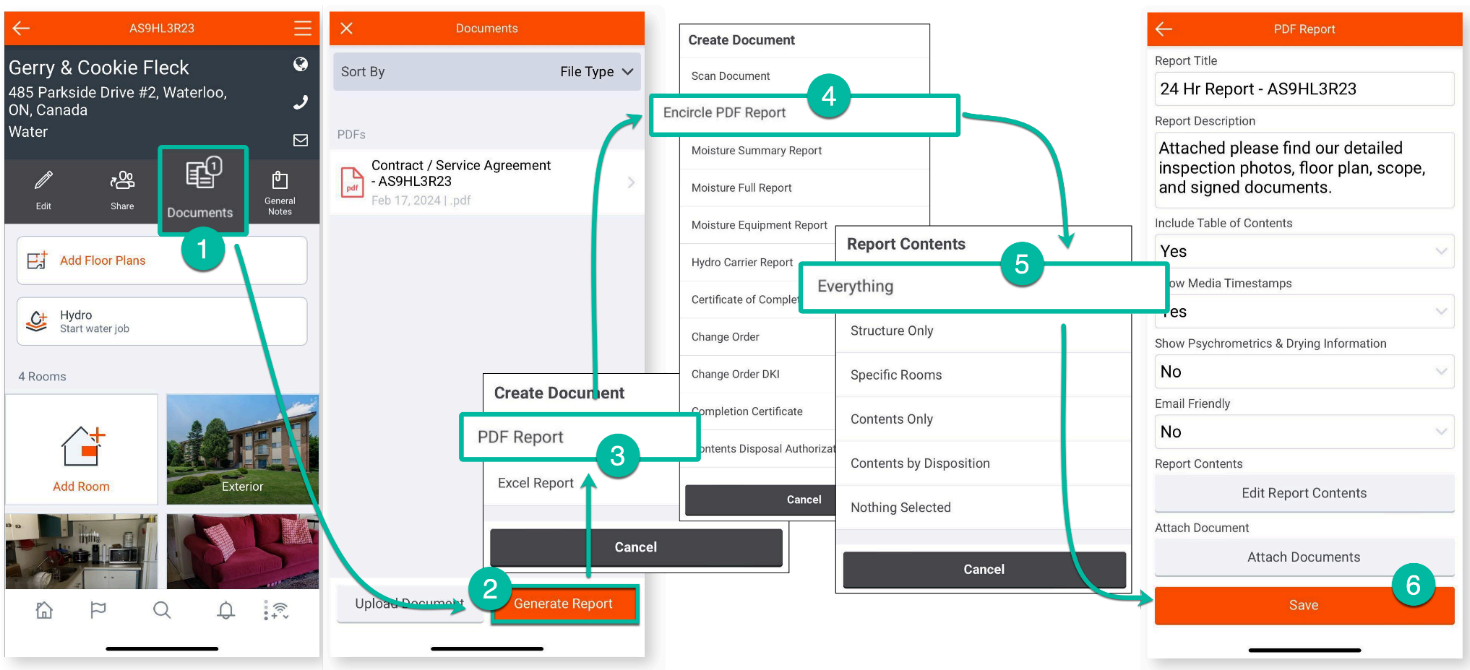
5. Edit the document title if desired and tap OK.
6. Fill out any required fields.
7. Tap Preview & Sign
8. Tap on the signature blocks to add any required signatures.
9. Save when done.



CREATING A REPORT

Pull your photos, notes, sketches, etc. into a PDF report.

1. From the home page of the claim, tap Documents.
2. Tap Generate Report.
3. Select PDF Report.
4. Choose the Encircle PDF Report template.
5. Select what data from the claim that you want to include in the report (in most cases you'll choose Everything).
6. Input a title and make your selections (table of contents, media timestamps, cover photo, etc) and tap Save.



SHARING A REPORT

Share your report with an adjuster or client.

1. Tap on the report.
2. Select Email to Policyholder.
3. The policyholder will be the recipient by default. You can change this if desired.
4. Input a custom subject line and message if desired and send.