

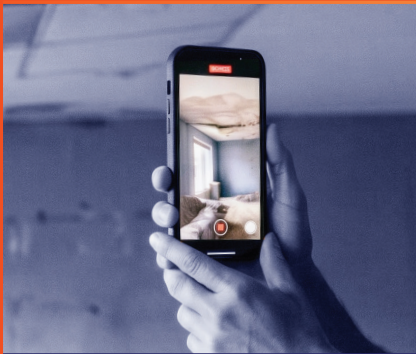


# Encircle Scope Best Practices

Get stronger Scopes, better defensibility, and easier estimating

## The simple workflow

### Step 1



#### Tell the Story

Document a damage description in a General Note or record a video walkthrough

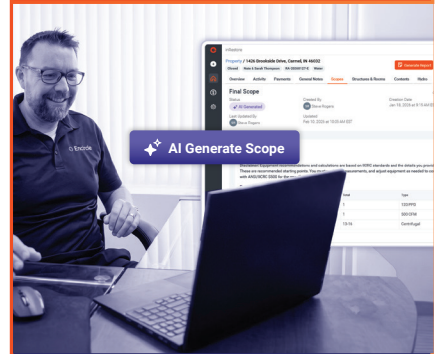
### Step 2



#### Document as you work

Keep room naming consistent across Floor Plan, Notes, Hydro, etc.

### Step 3



#### Refine and rerun

Run Scope early, again as the job progresses, and again before estimating

## Step 1 Tell the story

Describe in detail the damage you're seeing. Use voice whenever you can –spoken walkthroughs give Scope more context than short typed notes ever will.

### As you go, cover:

- ✓ Source and migration
- ✓ Category/type of loss
- ✓ Affected room details
- ✓ Affected materials
- ✓ Contents
- ✓ Concealed areas
- ✓ Hazards and environmental
- ✓ Planned work and action items
- ✓ Unknowns

### Field Tip



Go room by room. Fully describe one room before moving to the next.

## Step 2 Document as you work

Keep adding data to the file throughout the job—not just on Day 1.

### Per affected room:

- ✓ **Photos:** at least 6 per room. Wide, mid, close-up.  
*Bonus: a 360° room overview before any work begins and again every day.*
- ✓ **Notes:** affected materials, tear-out, cleaning, equipment, hazards, end-of-day conditions.
- ✓ **Measurements:** When ready, Encircle Floor Plan becomes the measurement source of truth  
*No Floor Plan? Document the measurements in a note or in Hydro instead.*
- ✓ **Hydro and equipment:** log every air mover, dehu and air scrubber in Encircle Hydro using matching room names and material types.  
*No Hydro? Add a General Note: "2 dehus, 3 air movers, 4 days."*

### Field Tip



Put blue painter's tape on the door jamb of every affected room and write the room name on it before documentation begins.

## Step 3 Refine and rerun

Scope is iterative. Don't expect one run to do it all.

- ✓ **Run early:** even before all data is in and the work has even started. The output can be used as a planning document.
- ✓ **Run again as the work progresses:** As tear-out happens, daily notes land and more documentation comes in.
- ✓ **Run final before estimating:** Review, refine, delete tasks that do not apply.

### Field Tip



In the first 72 hours, Scope may infer tasks that are likely to be done. After that, Scope relies on what's actually been documented.

## QA checklist before estimator handoff

- Detailed damage description video is narrated start to finish
- Rooms are clearly labeled and match across Floor Plan, rooms, notes, and Hydro
- Every room has photos, notes, and measurements
- Work performed is clearly documented
- Actual equipment and days used is captured
- Defensible items called out: board-up, electrician, antimicrobial, cleaning, subs