Encircle Administrator Guide

Summary

This guide is directed to individuals that will need to make changes and updates to the Encircle system from time to time.

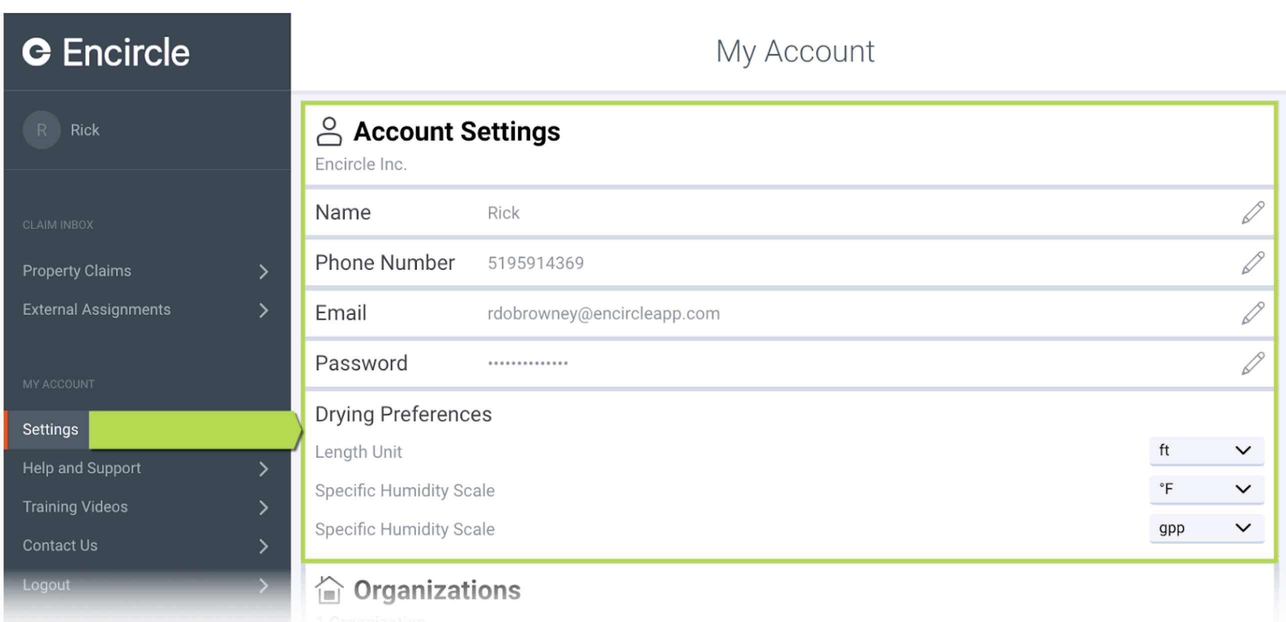
Audience

Administrators, Owners

Course	Topics Covered	Audience	Notes
Encircle Administrators It sounds technical but it is super simple. Most of your account setup is provided by Encircle, so It's basically a guide for the individual that will manage your encircle account when changes need to be made.	• Account settings • Organization Setup • Branding • Members (managing users) • Billing • External Assignments • Forms • Managing Lists • Job Status • Equipment • Payment	Administrators, Owners,	**45 min**

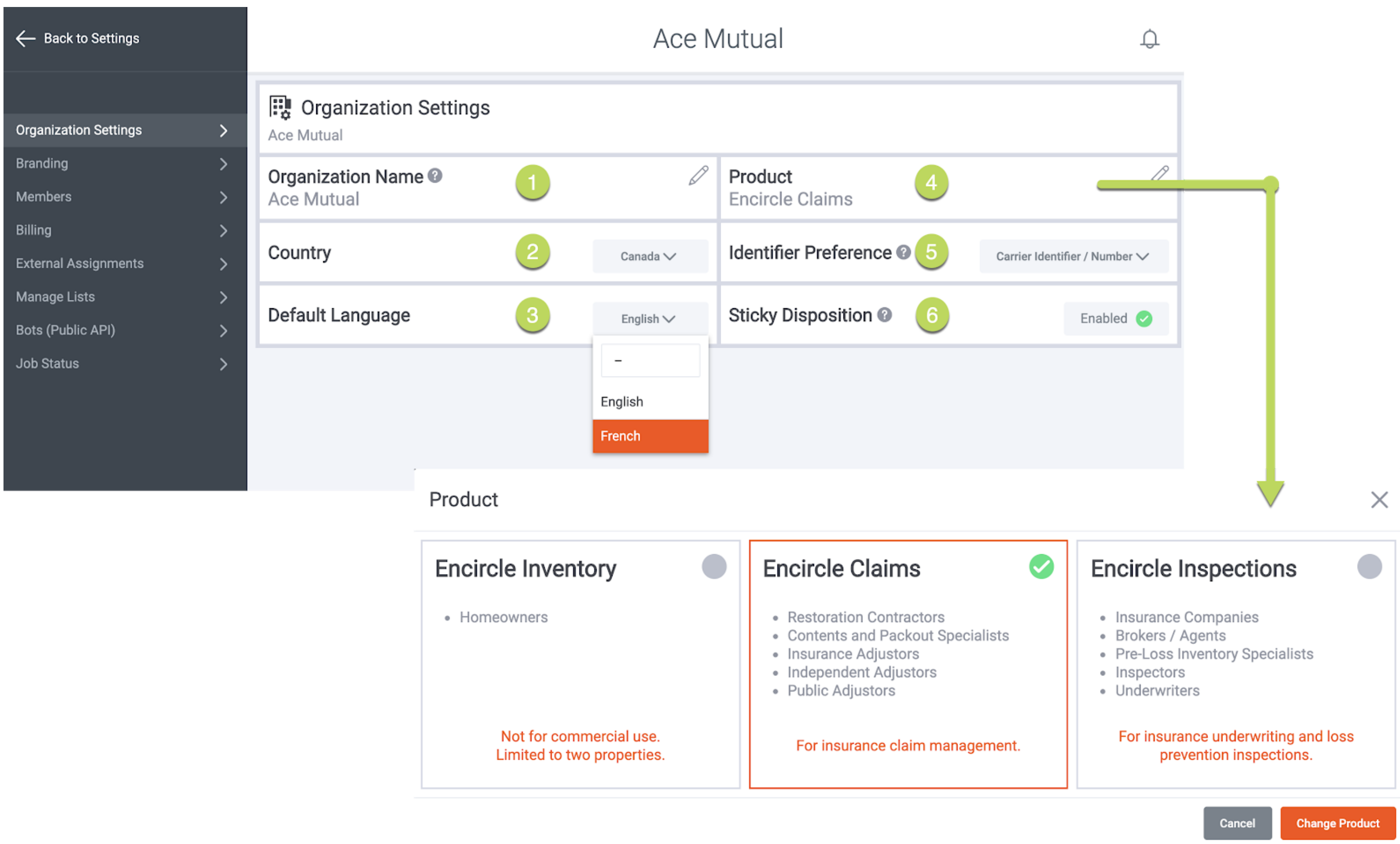
1. Account Settings

1. These are user settings that should be completed by each user.
2. The name setting is important as it will be used when sending a LINK to the customer from email or text message.
3. Drying Preferences can be set for regional preferences.



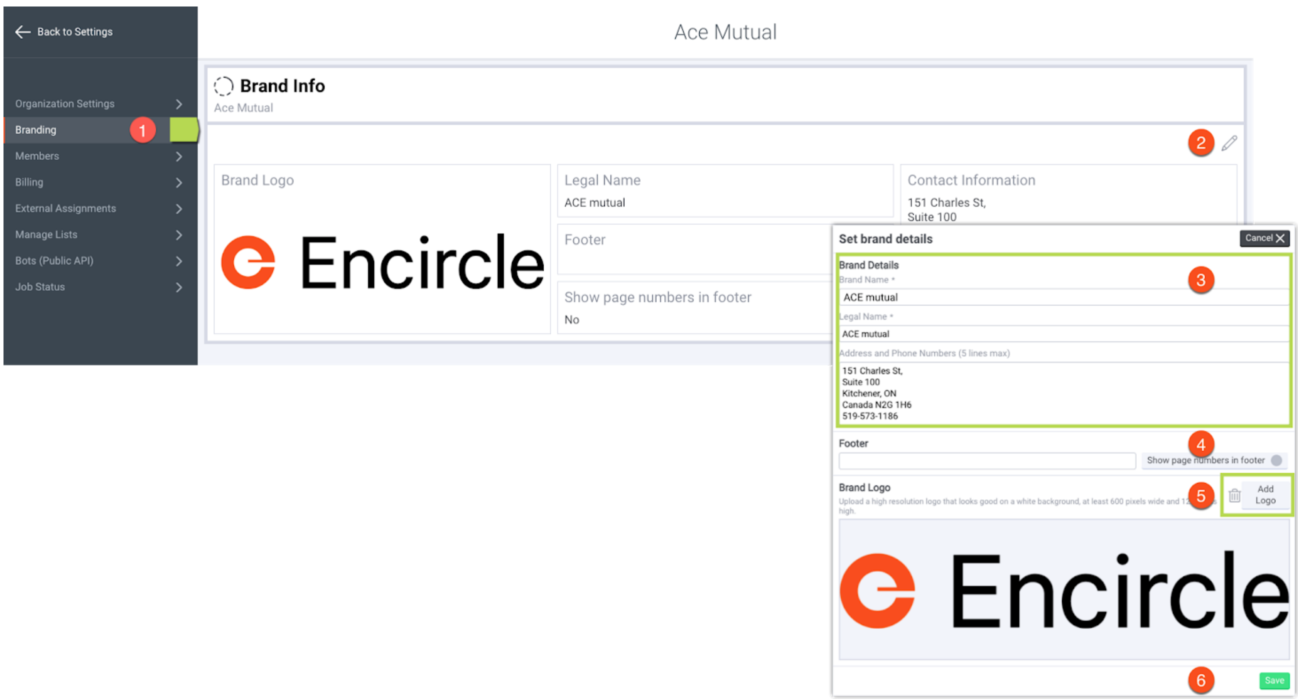
2. Organization Setup

1. Ensure the correctness of your org name.
2. Enter your country.
3. The default language is set here but can be changed on a claim for use with Link.
4. **Product,** typically "**Claims**" for Insurance carriers and contractors, and set to "**Inspections**" for companies handling property insurance.
5. **Identified Preference** - typically set to Claim ID - essentially means the ID that will be displayed in your Inbox. The choices are Carrier/ID, Contractor/ID, Assignment/ID.
6. **Sticky Disposition** (Usually set to ON), refers to the function of having the Contents app remember the last DISPOSITION and BOX ID, thereby saving some entry steps.



3. Branding

1. Click Branding
2. Click the pencil icon to edit
3. Brand Name - Typically the common identifiable name of the company, that clients recognize.
    i. Legal Name - If different from above and needed for legal agreements
    ii. Address - complete mailing address, phone #, and emergency number.
4. Footer - custom message printed on all reports and forms
5. Brand Logo - brand logo - needs to be large enough to be clear when viewing reports - but not overbearing.



4. Members

Click on the **Members** menu item.

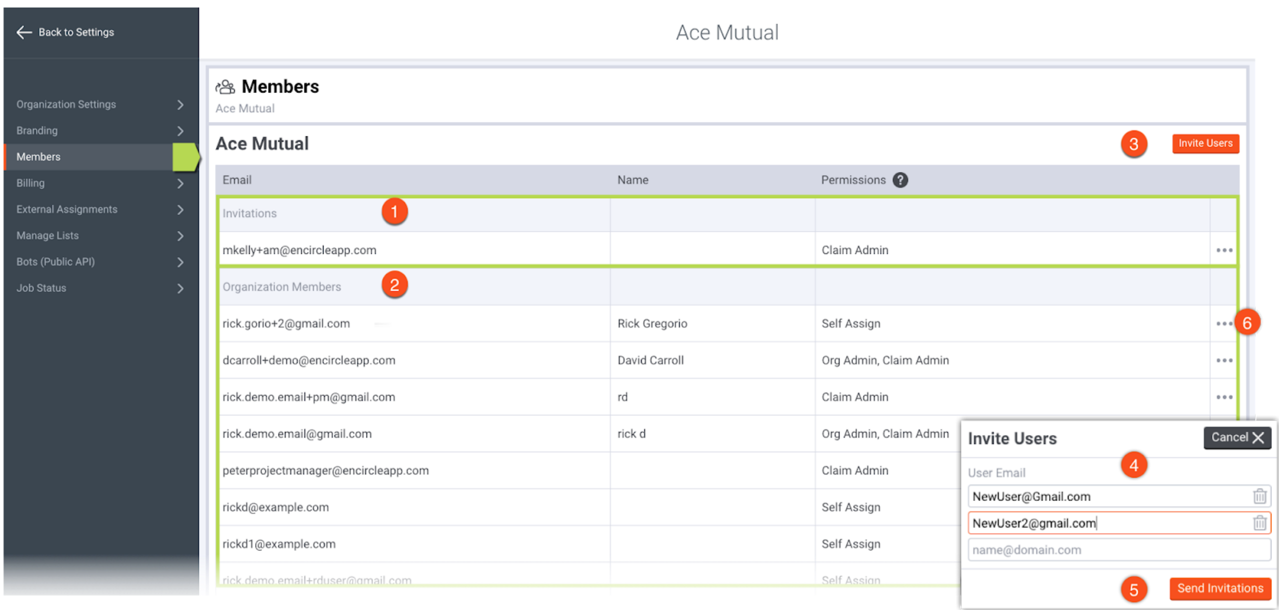
1. Any invited users will appear under the **Invitations** section until they accept the invitation and set password.

2. After accepting the invitation and setting a password, the invited user will show under the **Organization Members** section.

3. Click the **Invite Users** button to invite new users.

4. Enter the email addresses for each user.

5. Click **Send Invitations** to complete the invitation process. The new user will receive an email and the option to accept the invite and set a password.

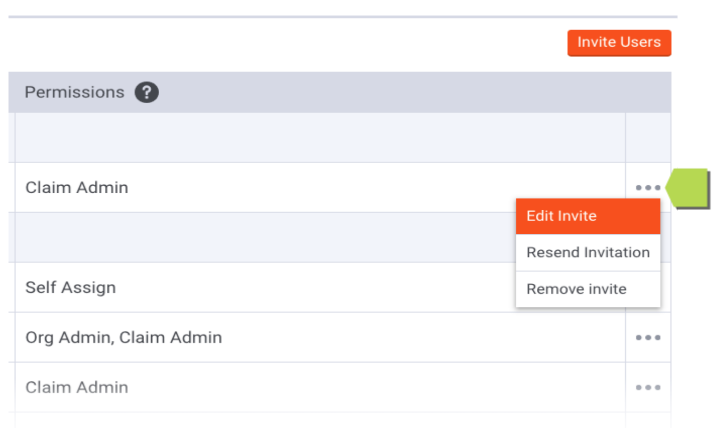


Managing invitations:

1. Click **Edit Invite** to remove an invitation or make a correction.

2. Click **Resend Invitation** to send another email notification of the invitation.

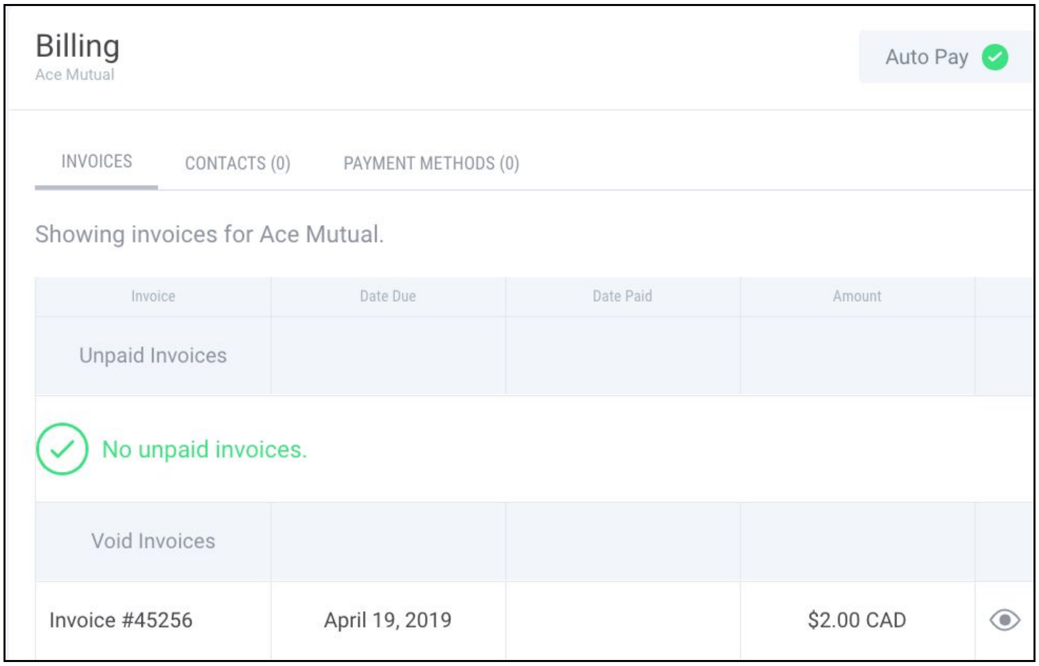
3. Click **Remove Invite** to remove an invitation.



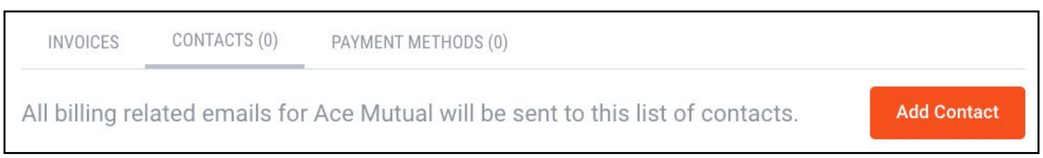
5. Billing

1. Invoices. Will show unpaid invoices on the top and void on the bottom. They can view previous invoices by clicking the Eye. (bottom right)

2. **AutoPay** can be selected and payment from CC will be instantly applied as billed.



3. Contacts. This provides the customer with the ability to have all billing related correspondence emailed to a non-member of the Encircle organization. As well as Organization Administrators. Like an "Accounting Inbox" for example.

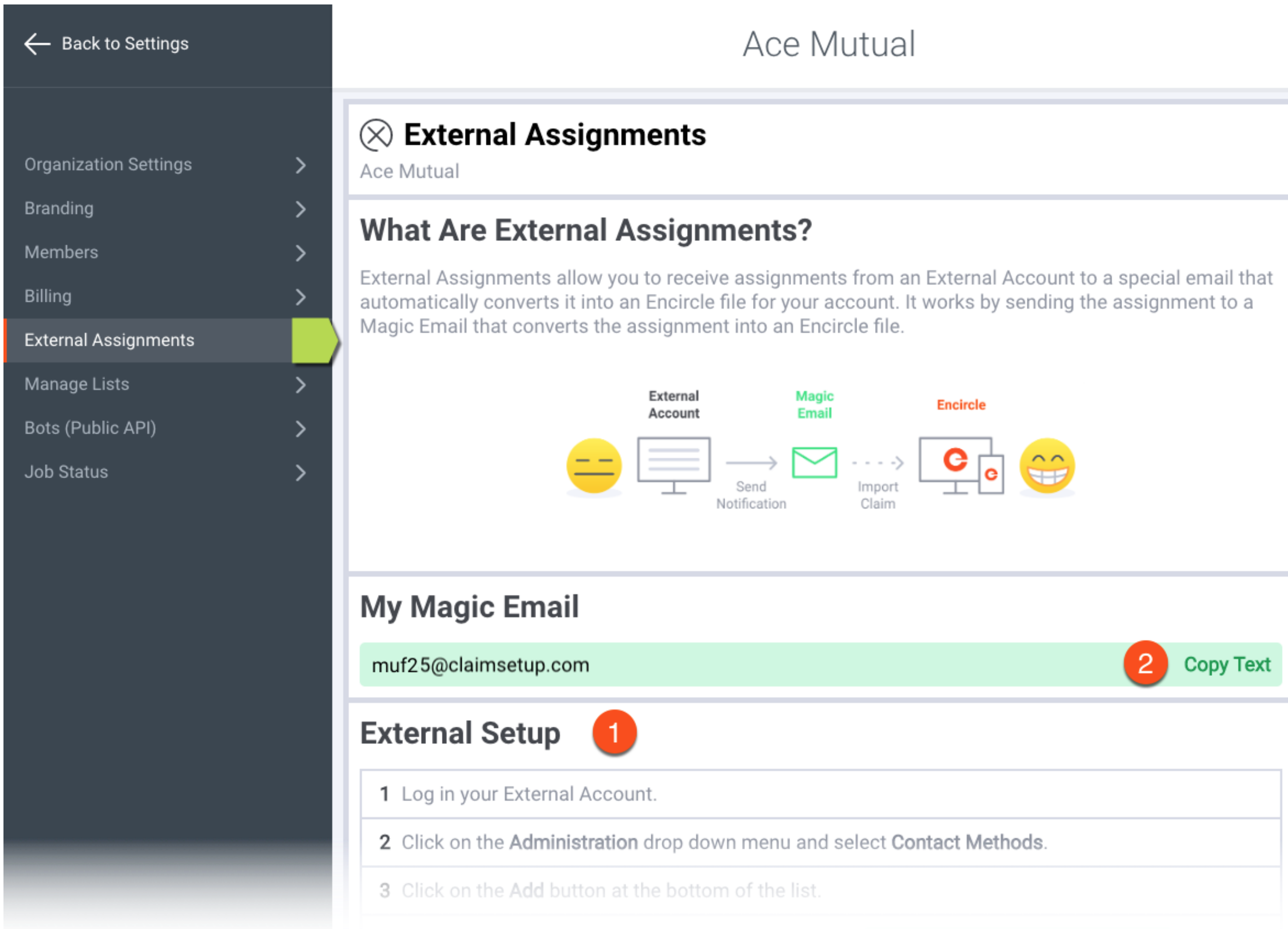


4. Payment Methods. Here they enter the credit cards.

5. Review the process for how to pay a bill

6. External Assignments

1. Definition: It provides a means of collecting notifications of external assignments which can be viewed by clicking on the section. From that point, the external assignments can be converted into claim files or merged with existing claim files.
    i. Ensure the cx understands how Xactimate external assignments setup works if it applies to them. This a process they must complete but we are able to provide direction.
    ii. Training on this function happens with **Claim Admin Training**.



7. Forms

1. Encircle can create digitized versions of customer forms and signable documents, such as work authorizations, health questionnaires, and customer satisfaction declarations to name a few. Forms are typically purchased but may be included with the sale.
2. Send your forms to support for a quote on having them implemented within Encircle. There is no obligation to move past the quotation stage.

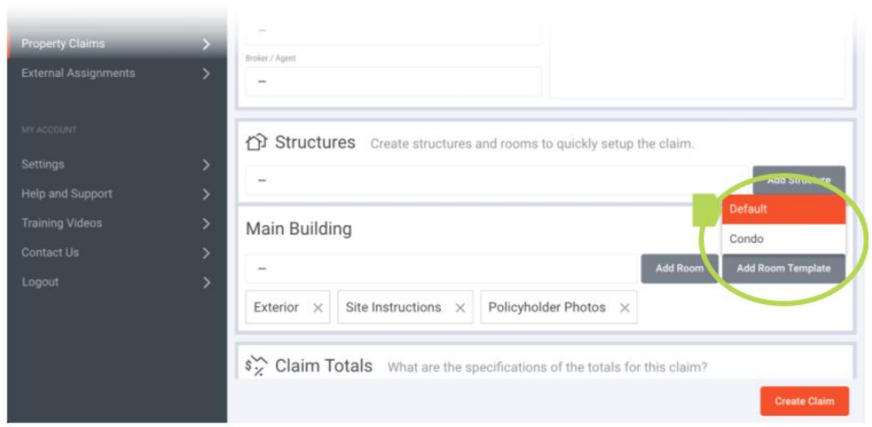
8. Manage Lists

This is the area where the customer can customize the Encircle experience and match it to his business process.

1. **DISPOSITION LIST:** *This list is used to help you categorize your cleaning and status for items during a packout.* Click the **Edit Disposition List** button to add new items to the list or change the order of the list. Note: changes to the disposition list will affect new claims but will not change the disposition list of past claims. .i.e. Disposable means the same as non-restorable. Just keep the one that resonates with the customer.

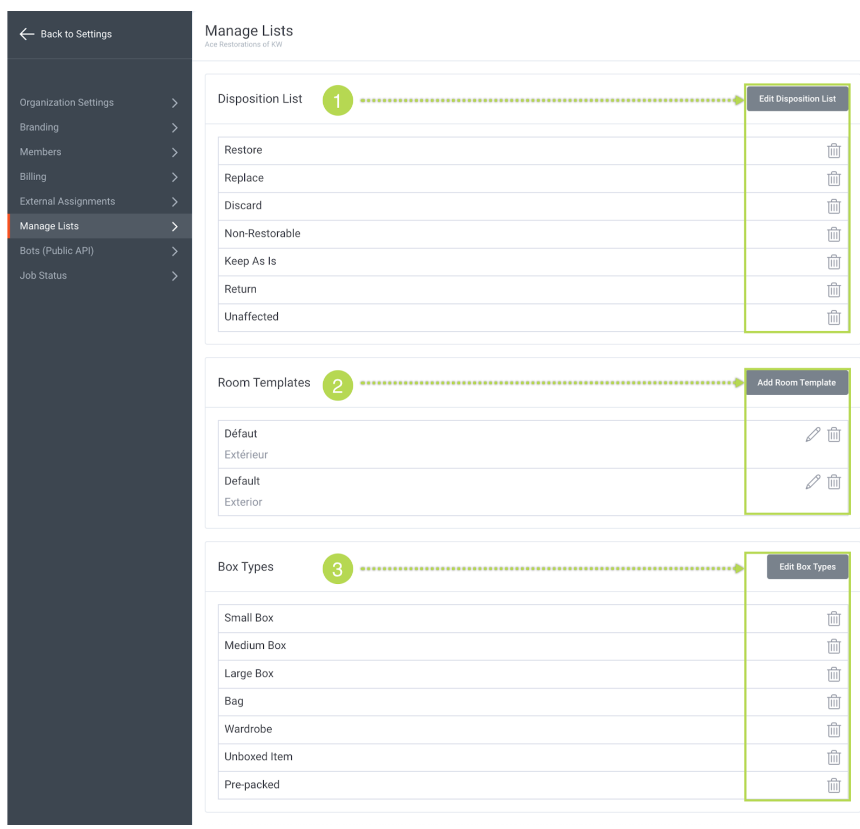
2. **ROOM TEMPLATES:** *This function provides an easy way of auto-populating rooms at the time of creating a claim.* Click the **Add Room Template** button to add new templates. Or click the **Edit icon** to modify an existing Room Template. Lastly, click the **Delete icon** to delete a Room Template.

    i. To use: When creating a new claim on the Encircle Web or Mobile app, you will see the option to select a room template. The default template will be used unless you select a different room template.



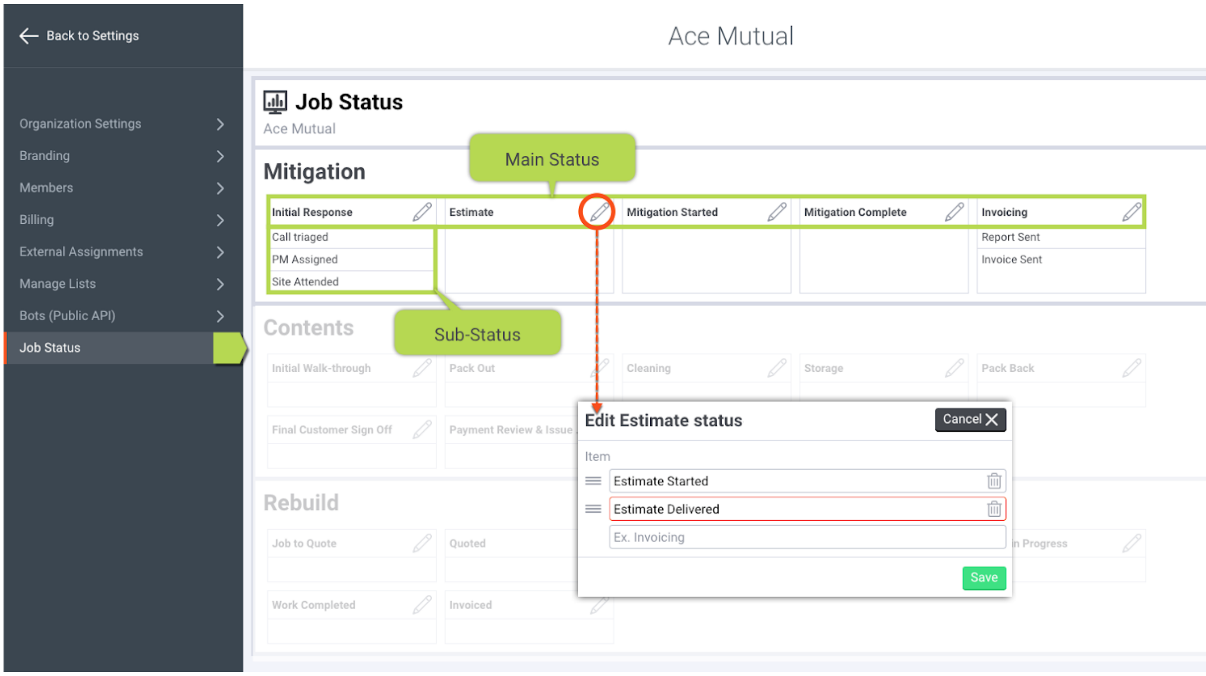
3. **BOX TYPES:** *This is the list of boxes you can choose from when doing a packout.*

    Click the **Edit Box Types** button to add new box types and adjust the order of the list. Or click the **Delete icon** to remove a box type from the list.



9. Job Status

1. Allows you to add additional custom statuses.



10. Equipment

a. If the organization will be using the "new" moisture product they can also enjoy the equipment tracking functionality.

b. New customers will have this turned on by default.

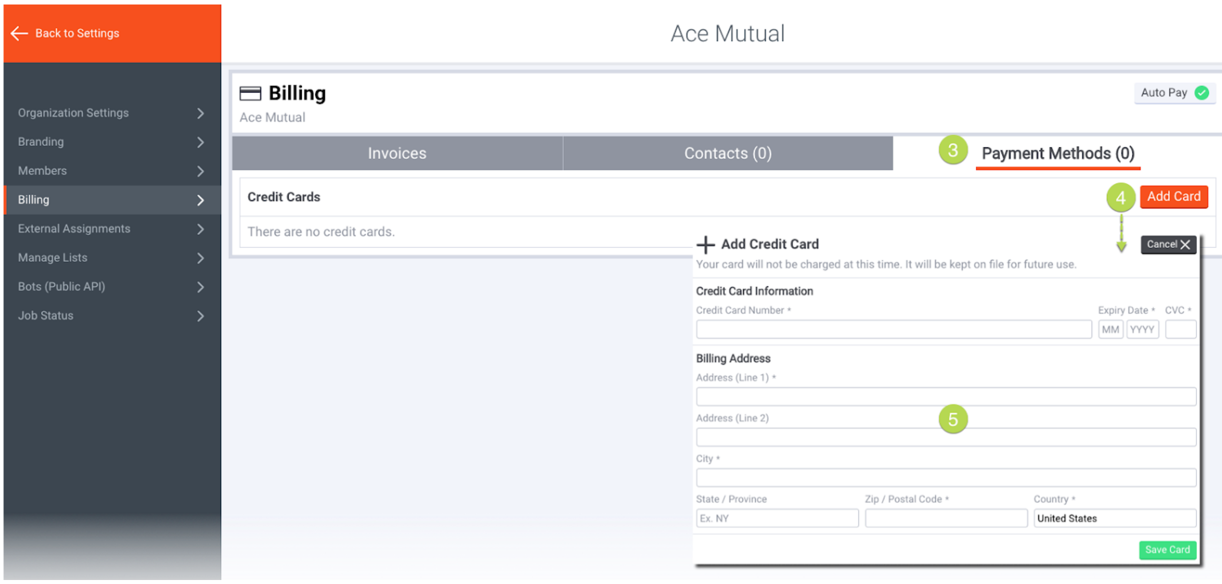
c. Older customers, prior to July 2019 will need to have a flag set to enable this functionality.

d. Have the customer download the spreadsheet template from the help site and return it for customer support to add the equipment.

e. You will see the current equipment in the portal under "Equipment".

11. Payment

1. Go to the **Billing** section and click on the **Payment Methods** tab
2. Click **Add Card.**



For larger organizations that have dedicated billing contacts, you can setup those contacts to receive billing communications without having to add them directly to Encircle.

To complete the steps below you must log in as an organization administrator within Encircle.

1. Click Settings.
2. Click Billing.
3. Go to the Contact section.
4. Click Add Contact,
5. Type in the email address for the person to receive billing notifications. Click Save Contacts.