

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.	<ul style="list-style-type: none">• 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.



R Rick

CLAIM INBOX

Property Claims >

External Assignments >

MY ACCOUNT

Settings


Help and Support >

Training Videos >

Contact Us >

Logout >

My Account

 **Account Settings**

Encircle Inc.

NameRick

Phone Number5195914369

Emailrdobrowney@encircleapp.com


Password*****

Drying Preferences

Length Unitft

Specific Humidity Scale°F

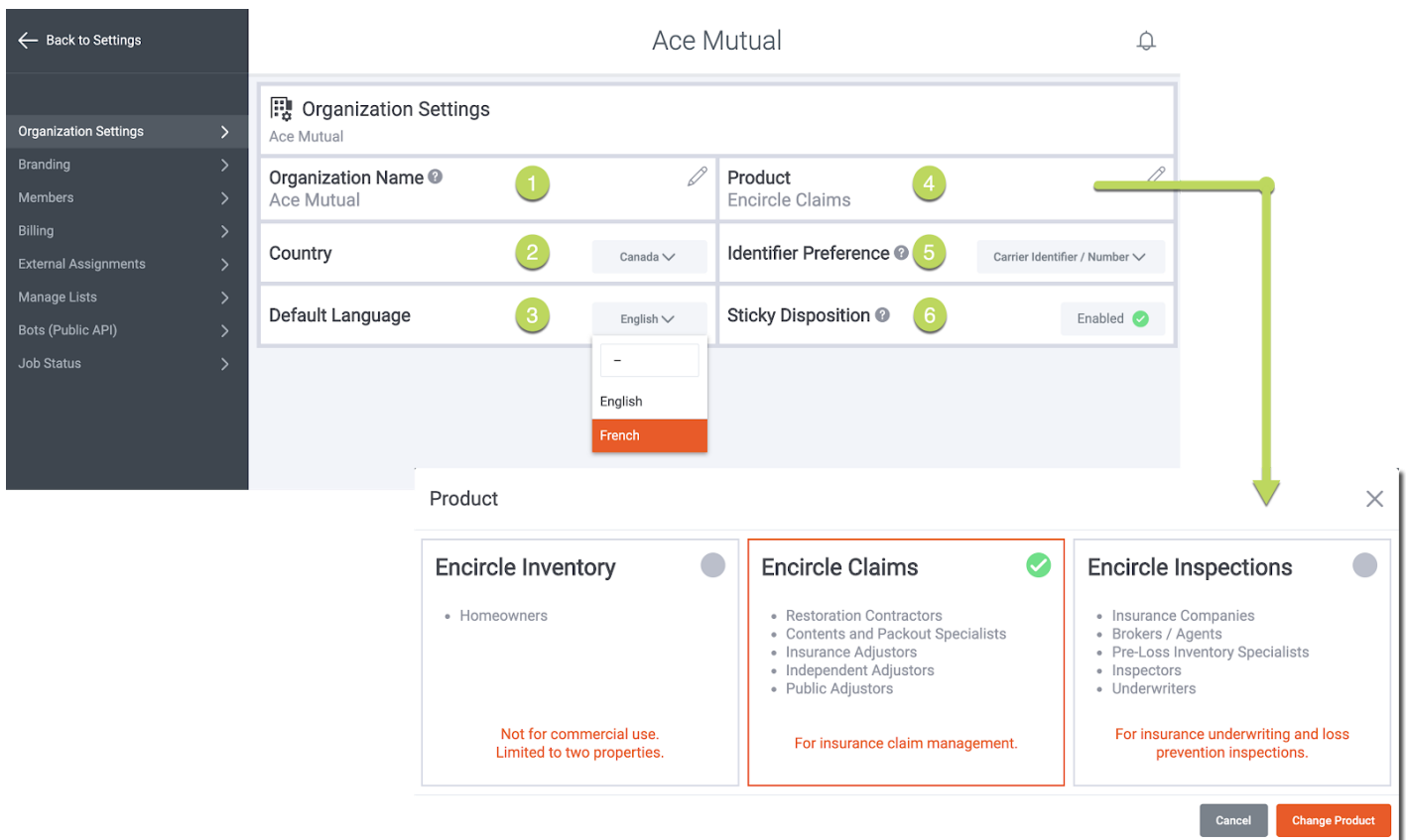
Specific Humidity Scalegpp

 **Organizations**

1 Organization

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.



The screenshot displays the 'Organization Settings' interface for 'Ace Mutual'. The settings are organized into a table with six numbered callouts (1-6) corresponding to the numbered list in the preceding section. A green arrow points from the 'Product' field (4) to a modal window titled 'Product'.

Organization Settings Table:

Field	Value	Callout
Organization Name	Ace Mutual	1
Country	Canada	2
Default Language	English	3
Product	Encircle Claims	4
Identifier Preference	Carrier Identifier / Number	5
Sticky Disposition	Enabled	6

Product Selection Modal:


The modal shows three product options, each with a list of associated roles and a description:

- Encircle Inventory** (Not for commercial use. Limited to two properties.)
 - Homeowners
- Encircle Claims** (For insurance claim management.)
 - Restoration Contractors
 - Contents and Packout Specialists
 - Insurance Adjustors
 - Independent Adjustors
 - Public Adjustors
- Encircle Inspections** (For insurance underwriting and loss prevention inspections.)
 - Insurance Companies
 - Brokers / Agents
 - Pre-Loss Inventory Specialists
 - Inspectors
 - Underwriters

Buttons: Cancel, Change Product

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.

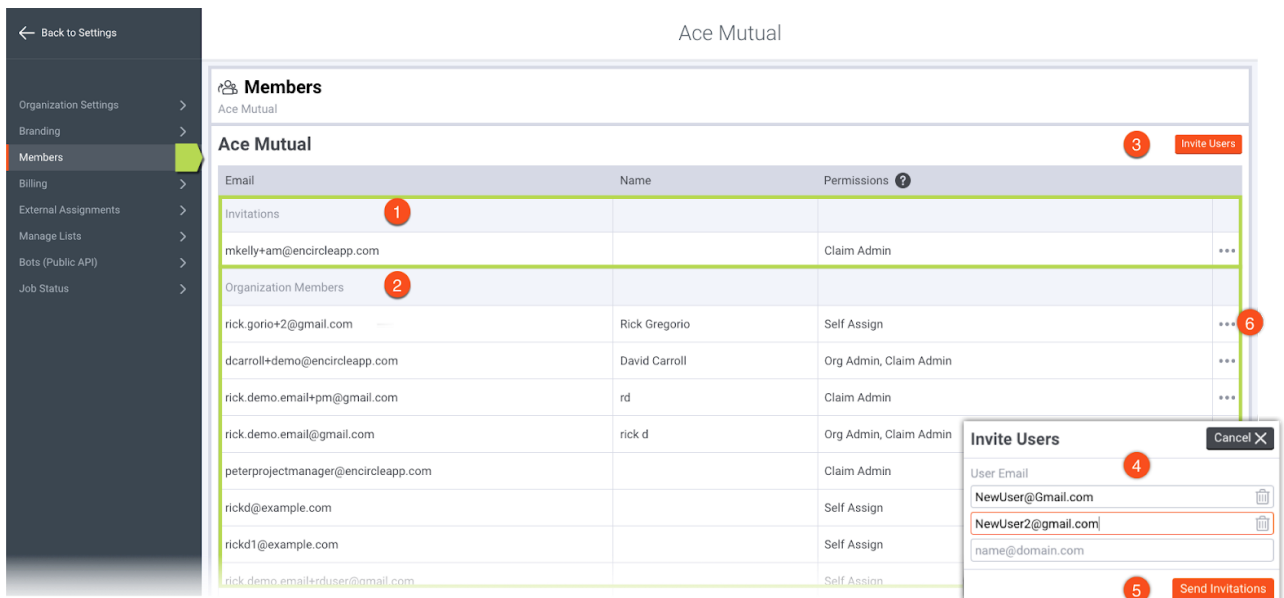


The screenshot shows the 'Brand Info' page for 'Ace Mutual' with a sidebar on the left containing navigation links: 'Back to Settings', 'Organization Settings', 'Branding' (highlighted with a red circle 1), 'Members', 'Billing', 'External Assignments', 'Manage Lists', 'Bots (Public API)', and 'Job Status'. The main content area has a header 'Ace Mutual' and a 'Brand Info' section with a pencil icon (2). The 'Brand Info' section includes fields for 'Brand Logo' (showing the 'Encircle' logo), 'Legal Name' (ACE mutual), 'Contact Information' (151 Charles St, Suite 100), 'Footer' (No), and 'Show page numbers in footer' (No). A modal titled 'Set brand details' is open, showing 'Brand Details' (3) with fields for 'Brand Name' (ACE mutual), 'Legal Name' (ACE mutual), and 'Address and Phone Numbers' (151 Charles St, Suite 100, Kitchener, ON, Canada N2G 1H6, \$19-573-1186). The modal also has a 'Footer' field (4) and a 'Show page numbers in footer' toggle. At the bottom of the modal is a 'Brand Logo' section (5) with an 'Add Logo' button and a 'Save' button (6). The 'Encircle' logo is displayed at the bottom of the modal.

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.

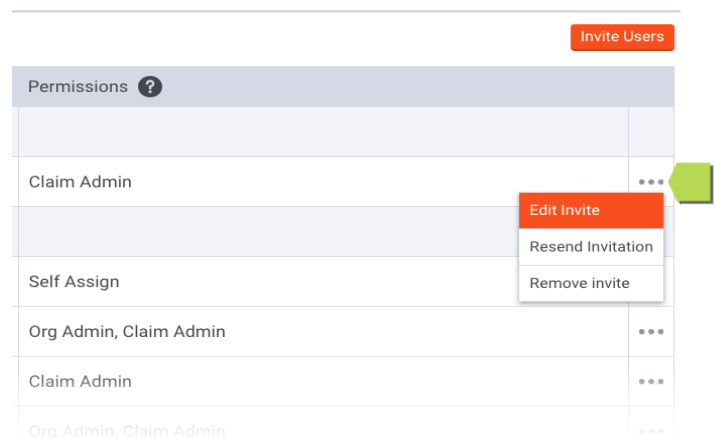


The screenshot shows the 'Members' page for 'Ace Mutual'. The left sidebar has a 'Members' menu item highlighted. The main content area is divided into two sections: 'Invitations' (labeled 1) and 'Organization Members' (labeled 2). The 'Invitations' section contains a table with columns 'Email', 'Name', and 'Permissions'. The 'Organization Members' section contains a table with columns 'Email', 'Name', and 'Permissions'. A red 'Invite Users' button is in the top right (labeled 3). A modal window titled 'Invite Users' is open on the right, showing a 'User Email' field with 'NewUser2@gmail.com' entered (labeled 4), and a 'Send Invitations' button (labeled 5). A red '6' is also present near the bottom right of the main table.

Email	Name	Permissions
Invitations		
mkelly+am@encircleapp.com		Claim Admin
Organization Members		
rick.gorio+2@gmail.com	Rick Gregorio	Self Assign
dcarroll+demo@encircleapp.com	David Carroll	Org Admin, Claim Admin
rick.demo.email+pm@gmail.com	rd	Claim Admin
rick.demo.email@gmail.com	rick d	Org Admin, Claim Admin
peterprojectmanager@encircleapp.com		Claim Admin
rickd@example.com		Self Assign
rickd1@example.com		Self Assign
rick.demo.email+rduser@gmail.com		Self Assign

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.




The screenshot shows the 'Members' page for 'Ace Mutual'. The left sidebar has a 'Members' menu item highlighted. The main content area is divided into two sections: 'Invitations' (labeled 1) and 'Organization Members' (labeled 2). The 'Invitations' section contains a table with columns 'Email', 'Name', and 'Permissions'. The 'Organization Members' section contains a table with columns 'Email', 'Name', and 'Permissions'. A red 'Invite Users' button is in the top right (labeled 3). A modal window titled 'Invite Users' is open on the right, showing a 'User Email' field with 'NewUser2@gmail.com' entered (labeled 4), and a 'Send Invitations' button (labeled 5). A red '6' is also present near the bottom right of the main table.

Email	Name	Permissions
Invitations		
mkelly+am@encircleapp.com		Claim Admin
Organization Members		
rick.gorio+2@gmail.com	Rick Gregorio	Self Assign
dcarroll+demo@encircleapp.com	David Carroll	Org Admin, Claim Admin
rick.demo.email+pm@gmail.com	rd	Claim Admin
rick.demo.email@gmail.com	rick d	Org Admin, Claim Admin
peterprojectmanager@encircleapp.com		Claim Admin
rickd@example.com		Self Assign
rickd1@example.com		Self Assign
rick.demo.email+rduser@gmail.com		Self Assign

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.

Billing
Ace Mutual

Auto Pay 

INVOICES CONTACTS (0) PAYMENT METHODS (0)

Showing invoices for Ace Mutual.


Invoice	Date Due	Date Paid	Amount	
Unpaid Invoices				
 No unpaid invoices.				
Void Invoices				
Invoice #45256	April 19, 2019		\$2.00 CAD	

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.

INVOICES **CONTACTS (0)** PAYMENT METHODS (0)

All billing related emails for Ace Mutual will be sent to this list of contacts.

Add Contact

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**.

← Back to Settings

Organization Settings >

Branding >

Members >

Billing >

External Assignments >

Manage Lists >

Bots (Public API) >

Job Status >

Ace Mutual

⊗ External Assignments

Ace Mutual

What Are External Assignments?

External Assignments allow you to receive assignments from an External Account to a special email that automatically converts it into an Encircle file for your account. It works by sending the assignment to a Magic Email that converts the assignment into an Encircle file.

External Account

Magic Email

Encircle

Send Notification

Import Claim

My Magic Email

muf25@claimsetup.com

2 Copy Text

External Setup 1

1 Log in your External Account.

2 Click on the Administration drop down menu and select Contact Methods.

3 Click on the Add button at the bottom of the list.

7. Forms

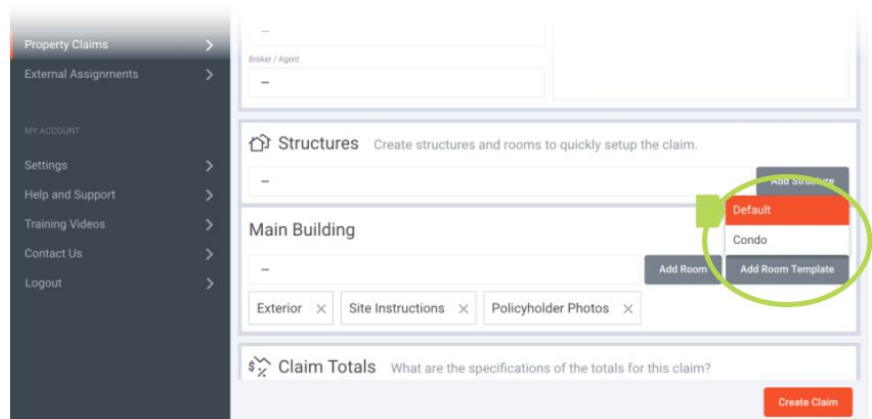
1. Encircle can create digitized versions of customer forms and signable documents, such as work authorizations, health questionnaires, and customer satisfaction declarations to name a few. Forms are typically purchased but may be included with the sale.
2. Send your forms to support for a quote on having 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.

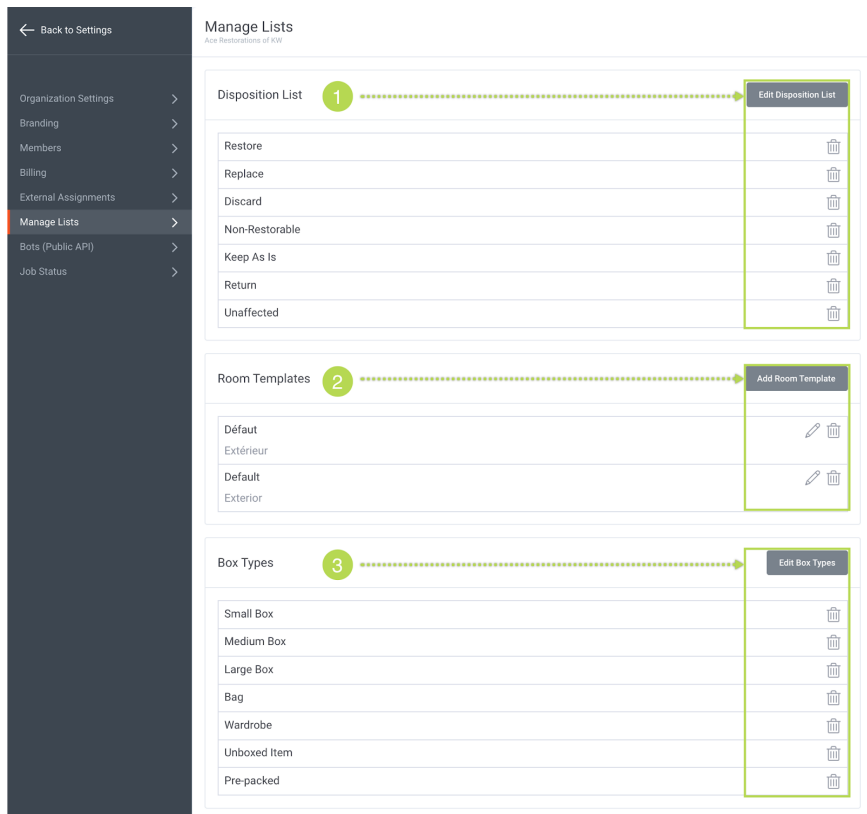
- i. To use: When creating a new claim on the Encircle Web or Mobile app, you will see the option to select a room template. The default template will be used unless you select a different room template.



The screenshot shows the 'Structures' section of the Encircle Web interface. On the left is a sidebar menu with options like 'Property Claims', 'External Assignments', 'MY ACCOUNT', 'Settings', 'Help and Support', 'Training Videos', 'Contact Us', and 'Logout'. The main content area has a header 'Structures' with the subtitle 'Create structures and rooms to quickly setup the claim.' Below this, there's a 'Main Building' section with a dropdown menu showing 'Default' and 'Condo'. To the right of the dropdown are two buttons: 'Add Room' and 'Add Room Template'. A green circle highlights the 'Add Room Template' button. Below the building section is a 'Claim Totals' section with a question 'What are the specifications of the totals for this claim?' and a 'Create Claim' button.

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.



The screenshot shows the 'Manage Lists' interface. On the left is a sidebar menu with options like 'Back to Settings', 'Organization Settings', 'Branding', 'Members', 'Billing', 'External Assignments', 'Manage Lists', 'Bots (Public API)', and 'Job Status'. The main content area is titled 'Manage Lists' and has a subtitle 'Add Restoration of KW'. It contains three sections: 'Disposition List', 'Room Templates', and 'Box Types'. Each section has a list of items and an 'Edit' button highlighted with a green circle and a number. The 'Disposition List' section has a list of items: 'Restore', 'Replace', 'Discard', 'Non-Restorable', 'Keep As Is', 'Return', and 'Unaffected'. The 'Room Templates' section has a list of items: 'Défaut', 'Extérieur', 'Default', and 'Exterior'. The 'Box Types' section has a list of items: 'Small Box', 'Medium Box', 'Large Box', 'Bag', 'Wardrobe', 'Unboxed Item', and 'Pre-packed'.

9. Job Status

1. Allows you to add additional custom statuses.



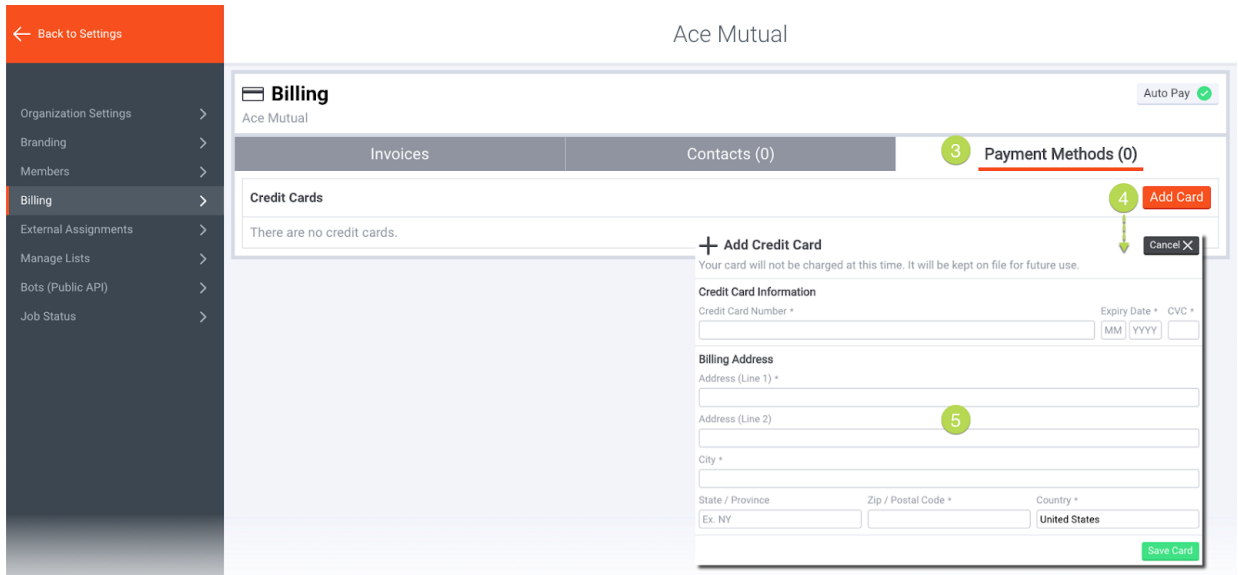
The screenshot displays the 'Job Status' interface for 'Ace Mutual'. On the left is a dark sidebar with a 'Back to Settings' link and a list of settings: Organization Settings, Branding, Members, Billing, External Assignments, Manage Lists, Bots (Public API), and Job Status (highlighted). The main content area is titled 'Job Status' and 'Ace Mutual'. It features three sections: 'Mitigation', 'Contents', and 'Rebuild'. The 'Mitigation' section has a table with columns for 'Initial Response', 'Estimate', 'Mitigation Started', 'Mitigation Complete', and 'Invoicing'. A green callout labeled 'Main Status' points to the 'Estimate' column. The 'Contents' section has a table with columns for 'Initial Walk-through', 'Pack Out', 'Cleaning', 'Storage', and 'Pack Back'. A green callout labeled 'Sub-Status' points to the 'Pack Out' column. The 'Rebuild' section has a table with columns for 'Job to Quote', 'Quoted', 'Work Completed', and 'Invoiced'. A modal window titled 'Edit Estimate status' is open, showing a list of items: 'Estimate Started', 'Estimate Delivered' (highlighted with a red box), and 'Ex. Invoicing'. The modal has 'Cancel' and 'Save' buttons.

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.

