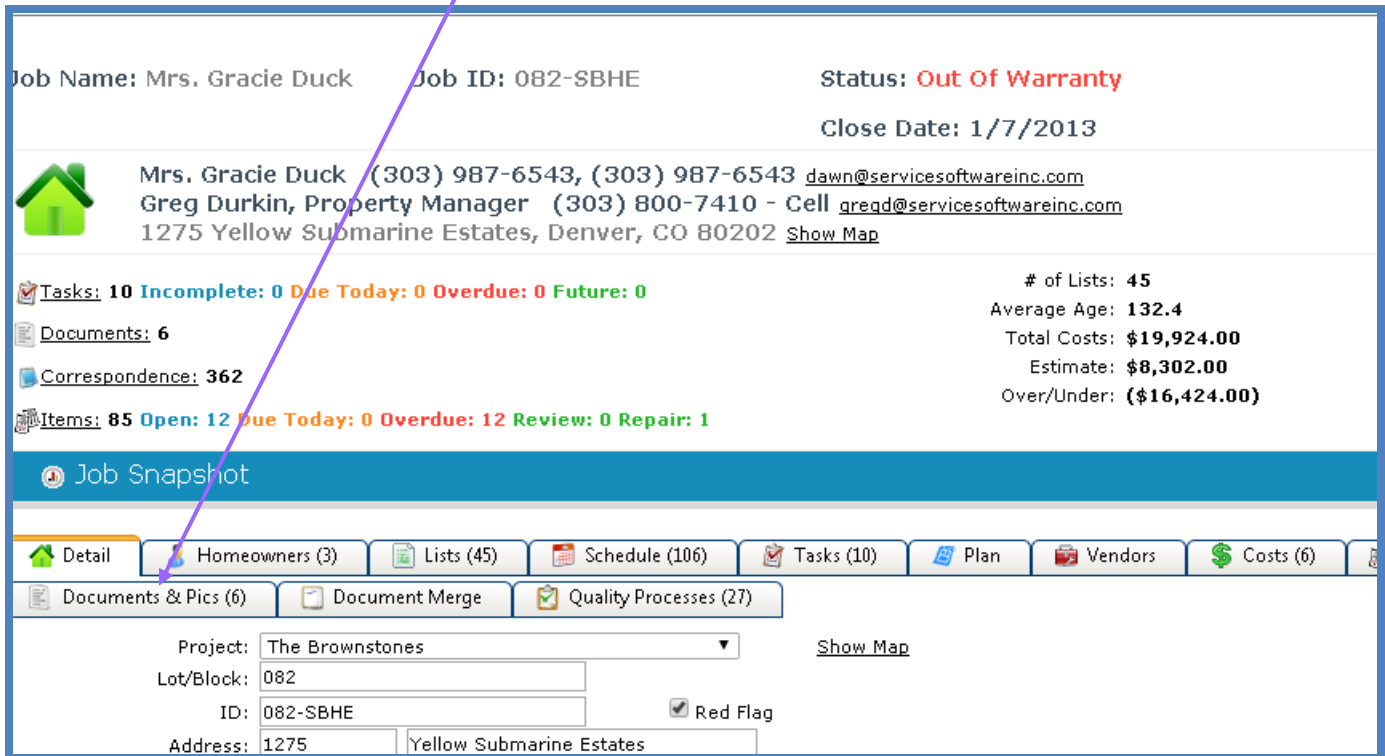


## HOW to ADD DOCUMENTS/PICTURES to JOBS


### How to Add Documents/Pictures to a Job

To add Documents / Pictures to a Job use search (Job by Contact, Job by Address or Job by ID) to navigate to the job. Select [Documents & Pics\\*\\*](#)

**Figure 1, Job Detail Screen**



Job Name: Mrs. Gracie Duck      Job ID: 082-SBHE      Status: **Out Of Warranty**  
 Close Date: 1/7/2013

 Mrs. Gracie Duck (303) 987-6543, (303) 987-6543 [dawn@servicesoftwareinc.com](mailto:dawn@servicesoftwareinc.com)  
 Greg Durkin, Property Manager (303) 800-7410 - Cell [gregd@servicesoftwareinc.com](mailto:gregd@servicesoftwareinc.com)  
 1275 Yellow Submarine Estates, Denver, CO 80202 [Show Map](#)

Tasks: 10    Incomplete: 0    Due Today: 0    Overdue: 0    Future: 0      # of Lists: 45  
 Documents: 6      Average Age: 132.4  
 Correspondence: 362      Total Costs: \$19,924.00  
    Estimate: \$8,302.00  
 Items: 85    Open: 12    Due Today: 0    Overdue: 12    Review: 0    Repair: 1      Over/Under: (\$16,424.00)

**Job Snapshot**

Detail    Homeowners (3)    Lists (45)    Schedule (106)    Tasks (10)    Plan    Vendors    Costs (6)

Documents & Pics (6)    Document Merge    Quality Processes (27)

Project: The Brownstones      [Show Map](#)  
 Lot/Block: 082  
 ID: 082-SBHE       Red Flag  
 Address: 1275      Yellow Submarine Estates

Job Documents is a central location that can be accessed by all employees to view all uploaded Documents and/or Pictures associated with a job. Like standards, closing documents, option sheets, color selection sheets, contracts, etc. In addition, Master Document's is available at the site level that allows you to store master documents that can be attached to all jobs. i.e. Homeowner Manual, Home Maintenance Sheets, etc. The following file types can be uploaded .doc, .pdf, .txt, .jpg, .gif, .bmp, .xls, .csv, .ppt, .pps, etc.

### Adding Master Docs (Note: this is an Administrative setup function):

Setup>Site Setup>Master Documents>Select New Master Document> 

Title and Description are required fields and need to be populated, select browse to upload the Master Document. Select Portal Viewable, Assign to All Jobs, Assign to All Vendors (if applicable) then select Add.

**Figure 2, Master Documents**

Title:       Description:

File: 

Portal Viewable    Assign to All Jobs    Assign to All Vendors    Assign to All Projects

## HOW to ADD DOCUMENTS/PICTURES to JOBS

### Adding Job Documents:




To add an individual Document select New Document  , located at the bottom left of the Job Detail – Documents screen. (figure 3) Title and Description are required fields (figure 4) and will need to be populated (*Note: special characters **CANNOT** be part of the file name; the document will not upload*). If there are folders for specific documents or pictures the folder can be selected at this time. Choose Select files to locate the Document you would like to upload then select  to upload. In addition, Documents can be added using Add Master. **Important:** There is no limit as to how many Documents can be stored against the job, one individual Document cannot be larger than **10mb**. **Note:** If the Document/Picture can be accessed through the Homeowner Portal, remember to select Viewable by Homeowner.

Figure 3, Job Detail – Documents (adding a Document)






Figure 4, Job Detail – Documents (adding a Document, contd.)

Title	<input type="text" value="Title"/>
Description	<input type="text" value="Description"/>
Folder	<input type="text"/>
	<input type="checkbox"/> Show In Job Portal <input type="checkbox"/> Show In Project Portal
	<input type="checkbox"/> Show In Intuitive Inspections
	<input type="text" value="Select files..."/>

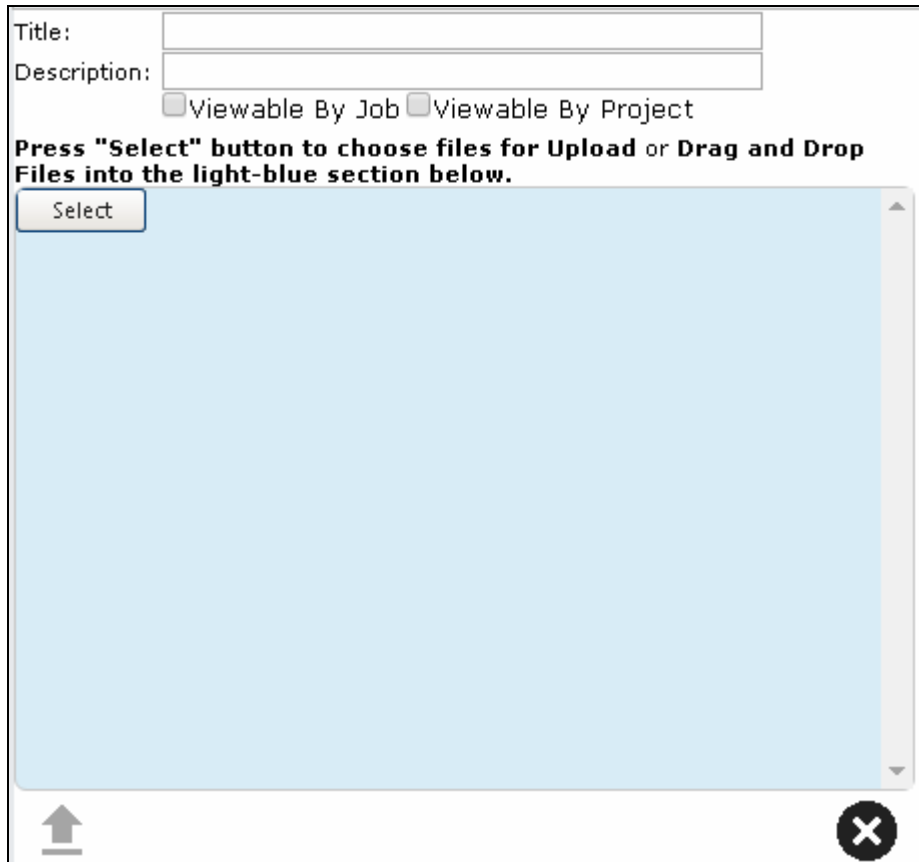


## HOW to ADD DOCUMENTS/PICTURES to JOBS

### Adding Pictures:

To add multiple pictures; select  located at the bottom of the Job Detail – Documents screen. (figure 3) Title and Description are required fields (figure 5) and will need to be populated, press Select to locate the Pictures you would like to upload then select  to upload once all pictures have uploaded select  to close the screen will refresh and the pictures will be associated with the job and viewable.

**Figure 5, Job Detail – Documents (add multiple pop-up)**



Title:

Description:

Viewable By Job  Viewable By Project

**Press "Select" button to choose files for Upload or Drag and Drop Files into the light-blue section below.**

Select

