Solera | in4mo

USER GUIDE

INSPECTION

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Inspection tasks

The insurance company has allocated an inspection task to your company. Your office has also gotten an e-mail with information about a new task.

Log in to the **correct portal** and choose **the correct case** by clicking on it.

When you have opened the case the status for the inspection task will turn to

Click on the button *Assign members* underneath the task list to the left. From the view *Assign members*; click on the *Edit* button next to *Inspector* and then choose from the next view *Edit assignes* that opens from the *Employees* list all the available employees, to who the inspection task should be assigned to.

Click on the circle, under the inspection task so that it shows a black dot in the middle. Click *Save*. When satisfied with the selection, click in the *Assign members* view also the *Save* button. You can also re-assign the inspector, in the inspection task's *Task Information* tab by clicking next to the Inspector on the right the *Choose* button.
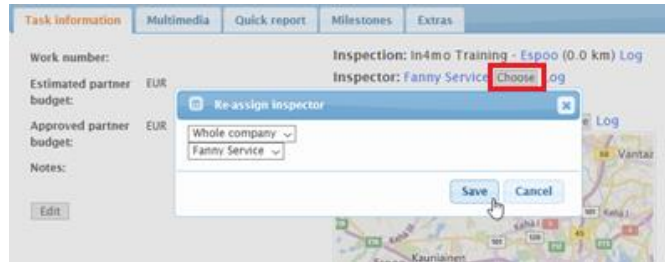
The assigned inspector will now get the inspection task to their **mobile application** and the

status changes from to

Inspection report on a tablet

On the Task Reporter you have your own personal task list. Here you can see all the tasks that has been assigned to you in cases. You can choose to filter out certain tasks, by clicking on the field with a magnifying glass above the task list and write in e.g. the address.

When you have received a new task, it will appear in your task list in the application. If you do not see the task; you can try to update the task list by swiping down with your finger on the screen, when you are on the task list. Open the task by clicking on it.
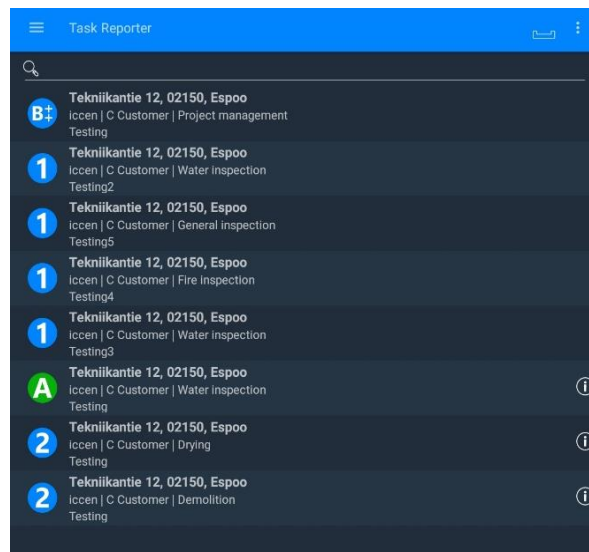
When you have opened a task, you will see the task information to the right next to where the site picture will be. At the bottom, you see two options: **DESC** and **CHAT ROOM**. When you open a task, the **DESC** view is the default view, which means Description. From this view, you can navigate to the **CHAT ROOM** view, from where you can communicate with and read messages from other participants involved in the case. We will tell more about this further on in these instructions.

First thing to do here, is to set up a meeting time with the customer for the inspection. By clicking on the *Call* -icon, it is possible to call the customer to agree the meeting time. When the time has been agreed, the time is set by clicking on the *Set meeting time* -button, under the site picture. Set the date and time and click on **OK** at the bottom of the screen.

When the meeting time has been set, the inspection task switches the status to
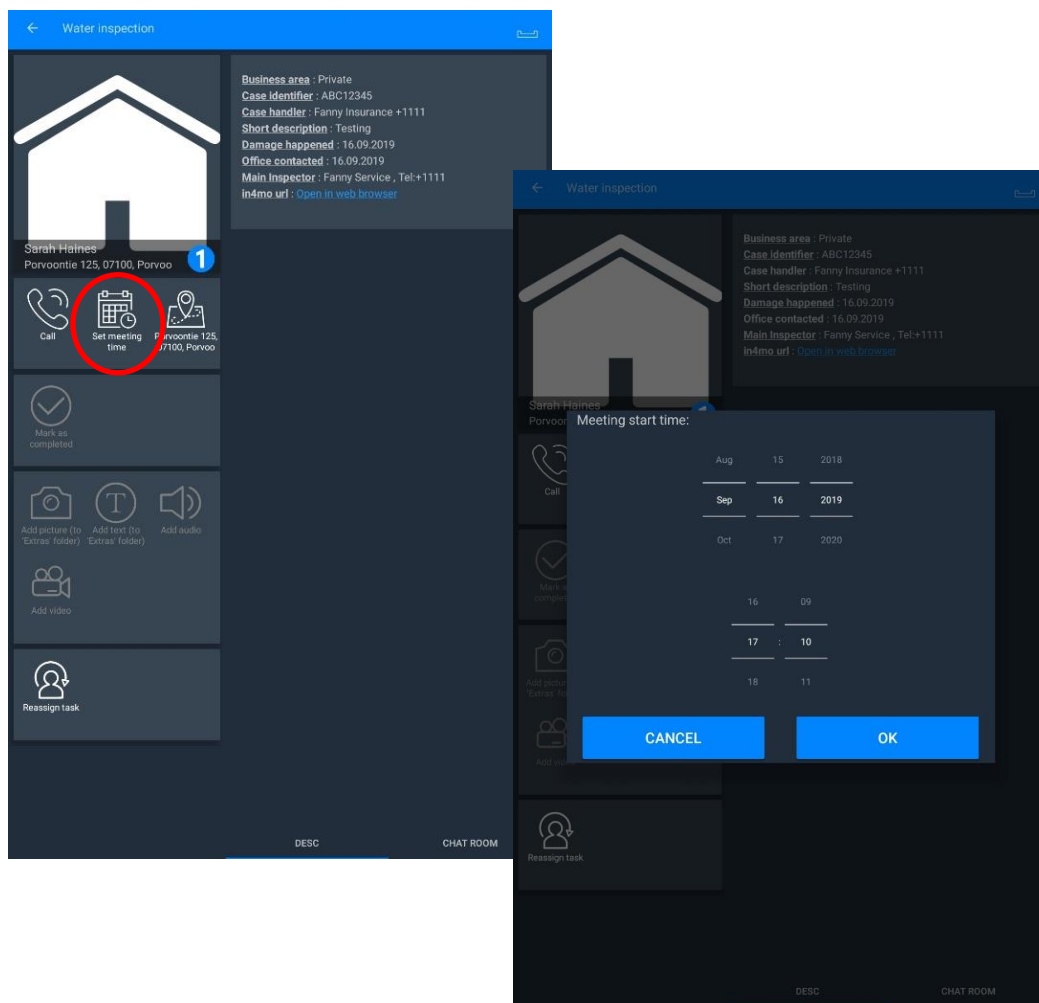
The next step is to take the site picture (*Take picture of the site*). At this point, you will also get access to fill out the work plan.

When the site picture has been taken, it will appear in Task Reporter right where the default picture was.

As the site picture has been uploaded to the case, the task switches the status to ③ This is when you will have access to the different functions of the task in Task Reporter. You can begin do the inspection itself, by filling out the report, by clicking the *Fill report* -button.
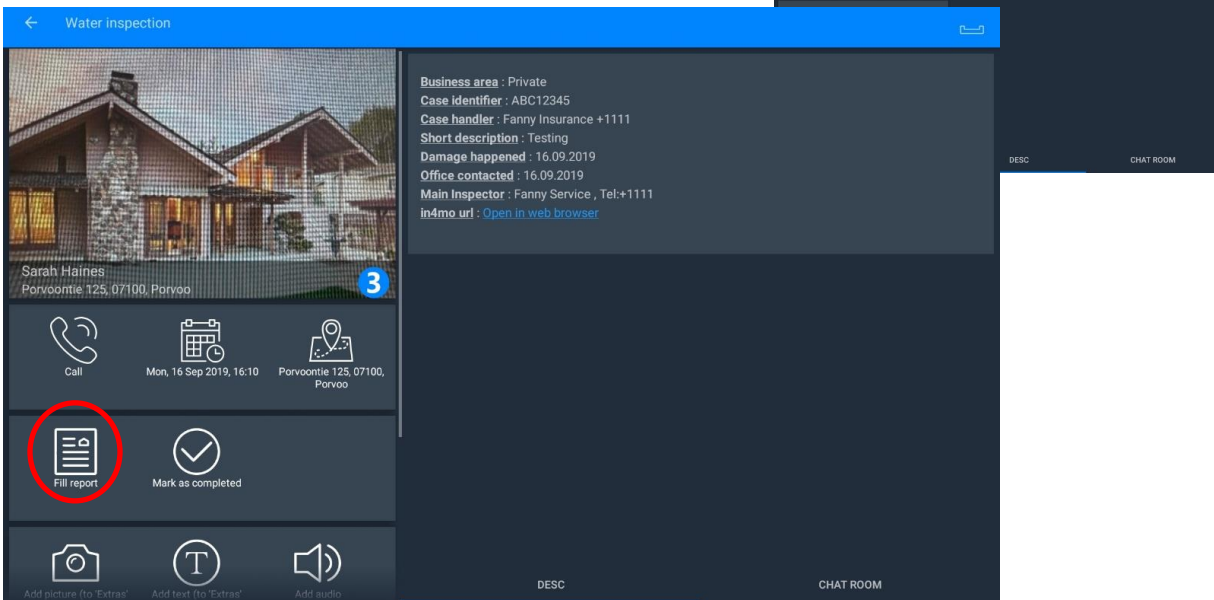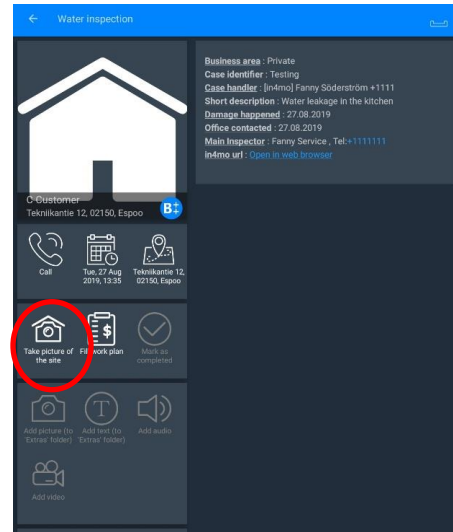
When using a tablet to report from the damage site, you can open the inspection report template directly in the application. On the tablet you are also able to upload the finished report from the app (Create Report) instead of having to upload it in the web separately.

If for some reason you cannot complete the inspection and you need to interrupt, you can put the case on hold by clicking the *Put case on hold* -button. When you continue the reporting e.g. by taking a picture, the case will automatically go back to be an active case.
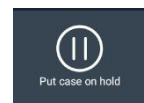
Possible mandatory fields have a red frame in the report view. These fields must be filled before the task can me marked as ready.

In the report template, if you want to mark the inspection as complete, click MARK AS COMPLETED up on the left.

The status will then change to **but the inspection report has not been uploaded to the portal**
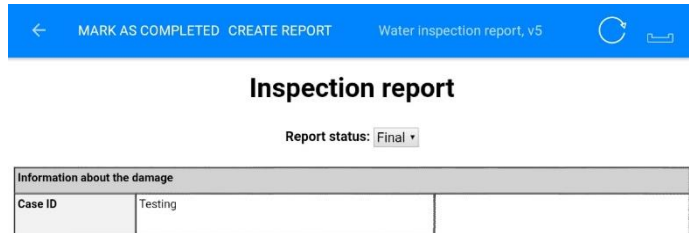
Choose CREATE REPORT when you want the inspection report to be uploaded to the portal.

An inspection report will be generated automatically in the web portal but the status for the task remains as **until the task is marked ready.**
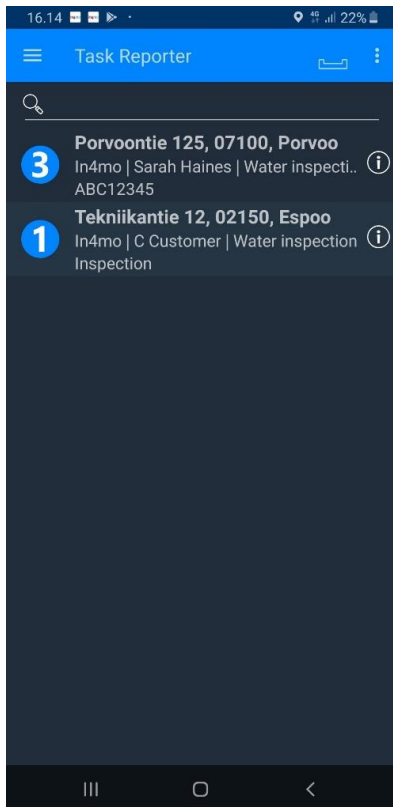

The task can be finished also by pressing the button Mark as completed – button. This will prompt a question asking if you want to upload the report too.

Reporting on a smartphone

Reporting with a smartphone, differs a little from reporting with a tablet.

As the new task is visible on the smartphone, click on it to see more details and to start with the reporting.
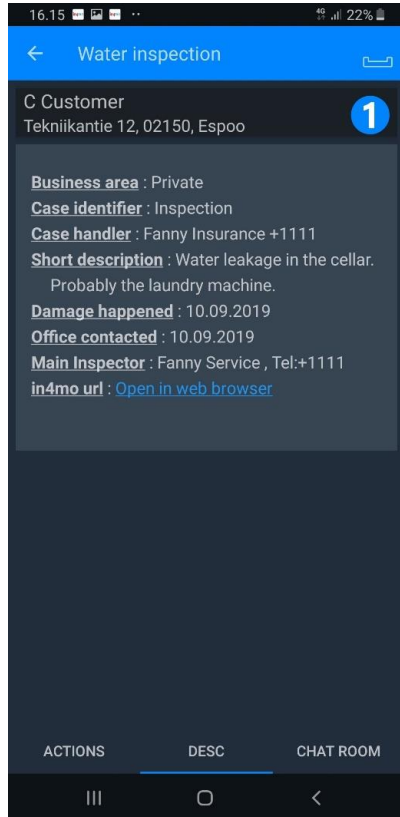
Click on the phone icon *Call* to call the customer or set the meeting time directly by clicking *Set meeting time*. Navigate to the damage site by clicking on the map icon (*Address of the site*).
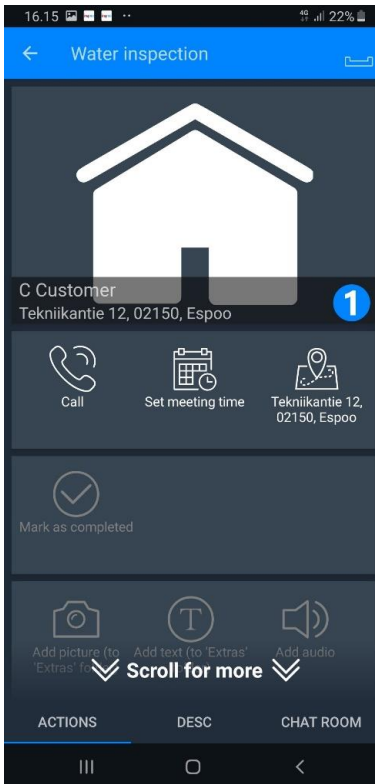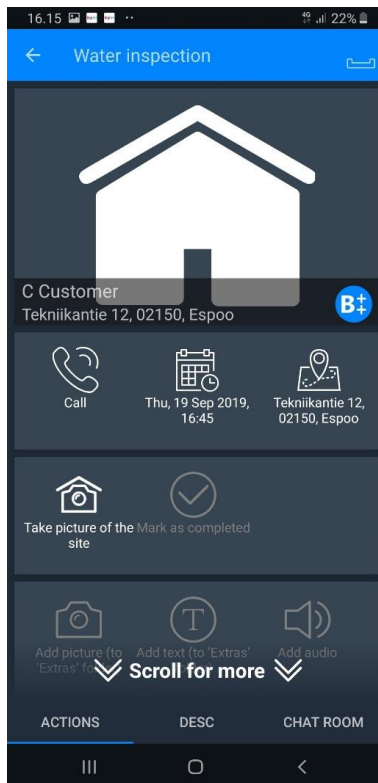
When the meeting time is set, the status of the task turns to
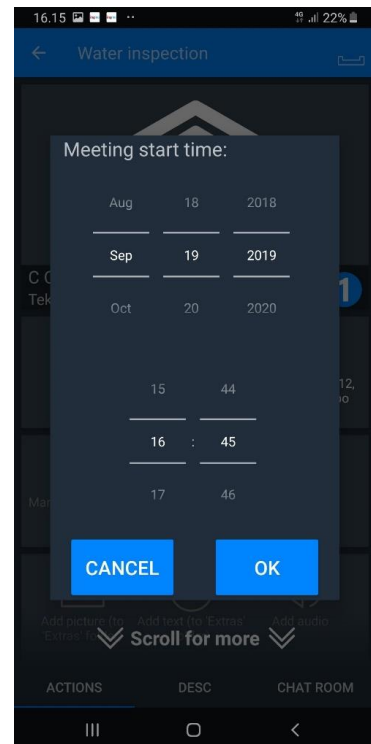
Click on the **DESC** (description) tab if you wish to see more information about the case.

Once the meeting time is set and the inspection begins, start by taking a picture of the site. Click on *Take picture of the site* camera icon


When the site picture has been taken, the inspection task switches the status to next step is to start reporting on the damage site. Click on the *Fill report*
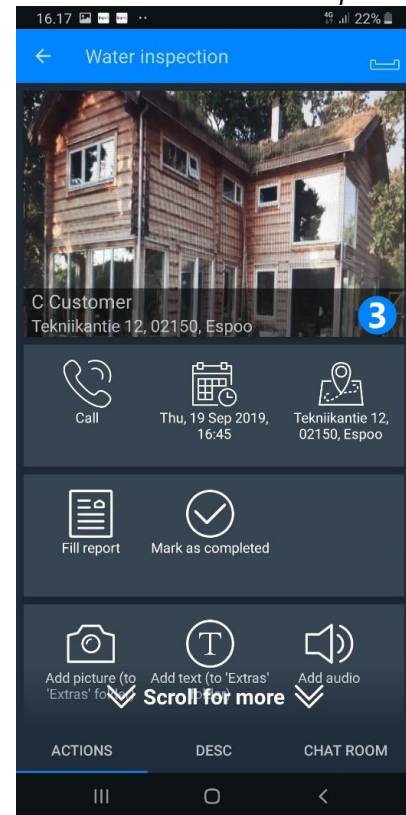
There may be mandatory fields in the report, that need to be filled out before the inspection task can be marked as completed. These fields are marked as Mandatory next to the field. Open a field by clicking on it, in order to fill in the needed information and then click *Send*. It is also possible to fill in the other fields, add texts or pictures in the report if needed to. When information has been filled in a field, a blue marker will appear next to the field ☑.

When the inspection is finished click on the *Mark as completed* icon for the type of inspection you were executing; water inspection, fire inspection, general inspection or other. **NOTE!** The inspection report does not generate automatically to the portal, when inspection is reported on a smart phone device. The report has to be manually created and saved in the portal on a PC, after the inspection task is marked as completed in the case under *Documents*. A web report will be available in the portal automatically. We will tell more how to create and upload a document to the portal and also what the web report is, later on in these instructions.
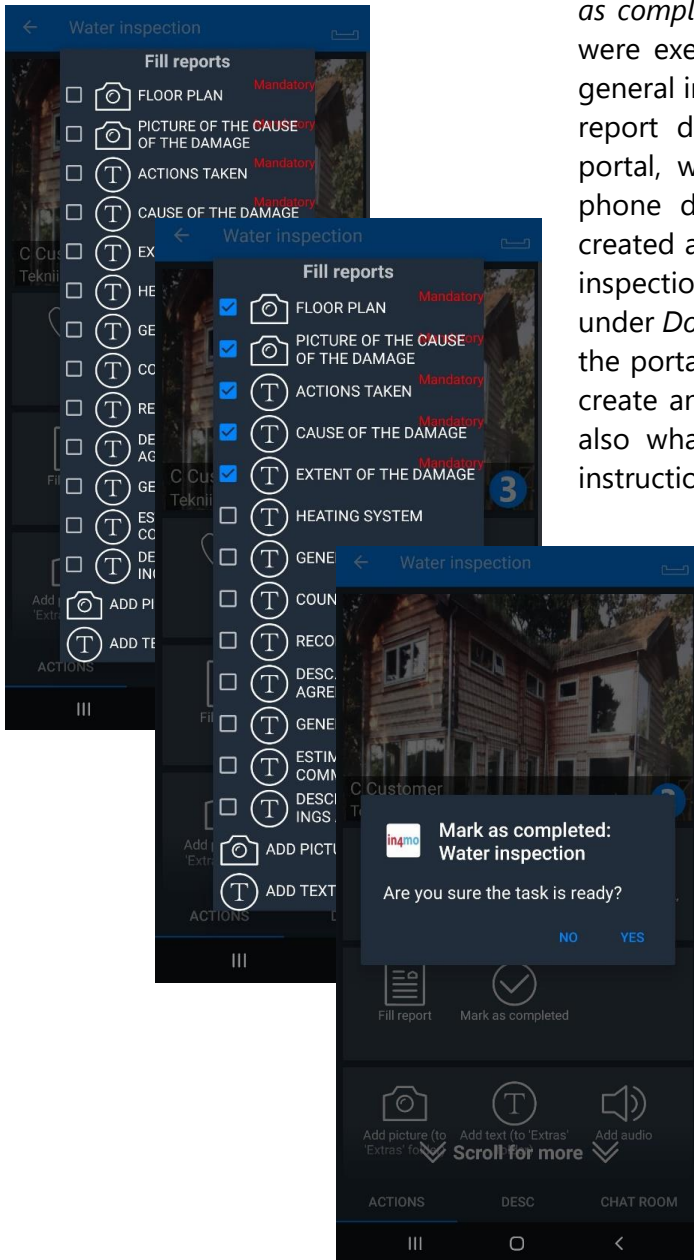
The status changes to 4 when inspection is marked as completed. It is still possible to edit / send in report items on the smart phone device, before the compensation decision has been made by the insurance company.

Additional pictures and text, as well as measurements and audio- and videomaterial can be added to the case on the **ACTIONS** tab. These will not be included in the report.
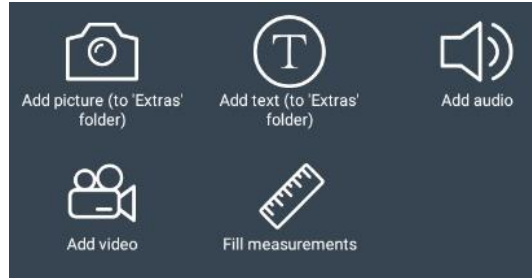

You can send / read chat messages under the **CHAT ROOM** tab to / from all the parties, that are somehow involved in the case; such as the case handler and other members who have been assigned for the other tasks in the case.

Press the blue bell icon to choose the recipient(s) and the blue arrow to send the message. Note that before the message can be sent out, at least one recipient needs to be selected.
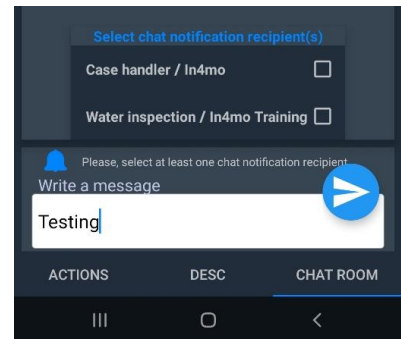
Chat messages are also visible in the portal in the *Chat room*.
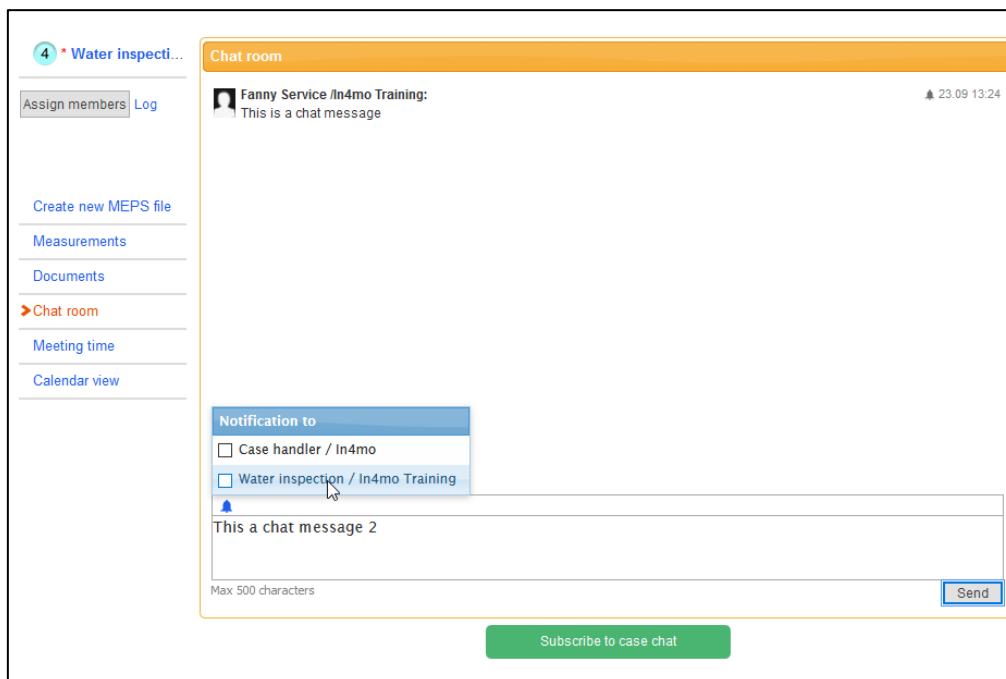
Inspections in the web portal

Multimedia

The reported information is stored and visible under the *Multimedia* -tab in the web portal. You can look at pictures, video- and audio materials and make a picture bigger by clicking on it.

You can also add text to picture by clicking on *Edit*.

You can also upload pictures from your PC to the case by choosing a picture and pressing *Add*.
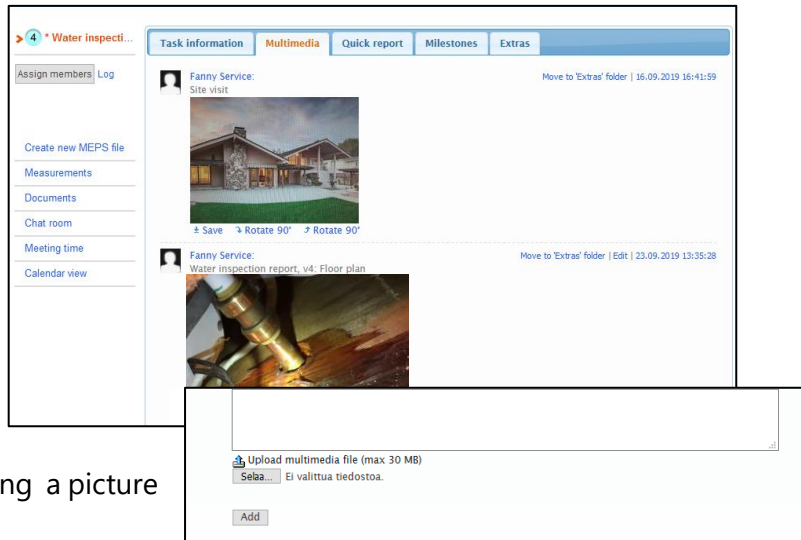
NOTE! If you wish to ensure that the pictures are included in the final report, the pictures should be added through the Web report instead.

Web reports

Everything reported in the report view during the inspection from the mobile application are also stored under the *Reports* tab, where you can view the reported information in the same report format used on a tablet, and from where you can generate the inspection report so that it is added to the document library.
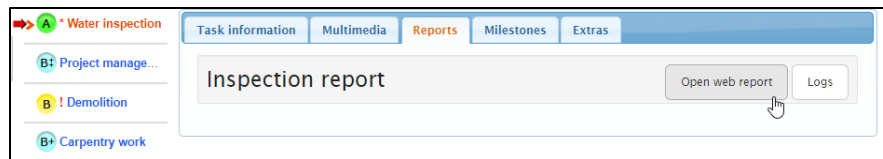
NOTE! There is also the possibility to report inspections directly in the web portal. For this we have separate instructions available.

Extras

It is possible to send pictures and text messages to *Extras* folder from the mobile application. These pictures will not be visible in the report. You can move items from this folder to Multimedia by choosing *Move to multimedia* if you want an item to be in the inspection report. Similarly, items from Multimedia can be moved here, if the items should not be included in the report.
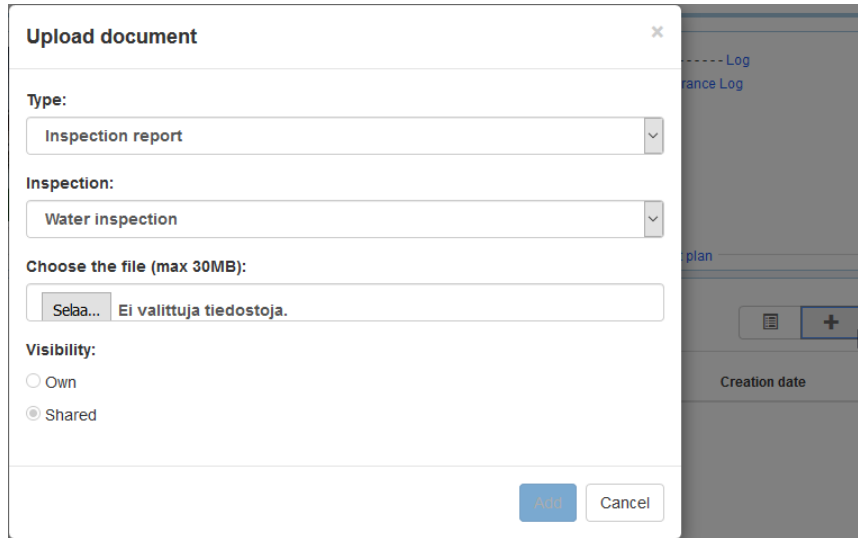
Creating an inspection report in the portal

Go to *Documents* in the menu on the left.

Choose the [icon] button in order to <u>create the report</u> and choose from the task list the task you want to create a report for and choose the report you want to download. Click *OK* and in the next view *Download file*.
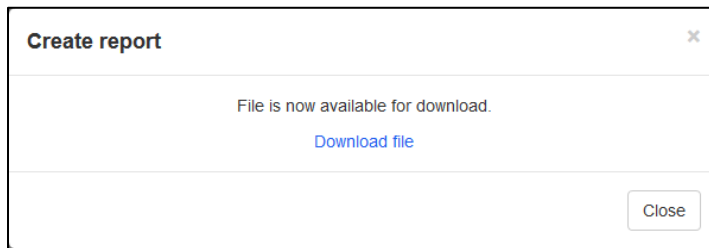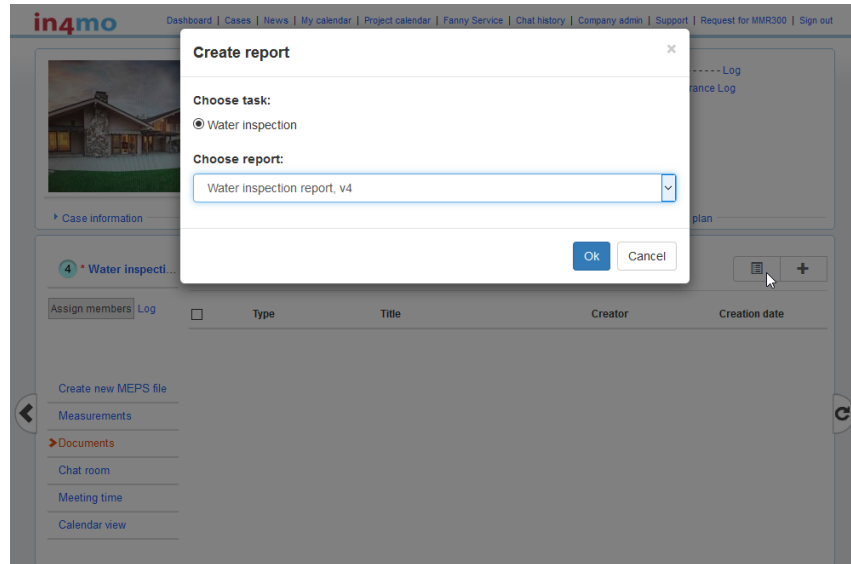
The report opens as a Microsoft Word document or with whatever other program you may have on your computer that supports .docx -format. If necessary you can edit the report after which save it on your computer files.

When the report is ready and saved on your PC click on the ➕ button and choose the saved report. Click on *Add* to upload the document.

Upload document ✕

Type:

Inspection report ⌄

Inspection:

Water inspection ⌄

Choose the file (max 30MB):

Selaa... Ei valittuja tiedostoja.

Visibility:

○ Own

◉ Shared

Add Cancel

The documents in the *Document library* are opened by clicking on the title.

		Type	Title	Creator	Creation date	
☐	Ⓦ	Inspection report	Water inspection report, v4-Water inspection-ABC12345.docx	In4mo Training	23.09.2019 14:38	⚙

Document library Log