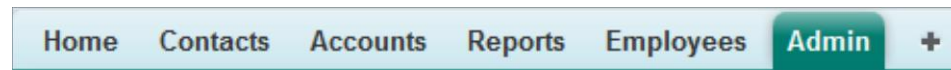


 **Recommended Workflow: Using Milestones**

This tutorial will explain the milestone workflow and how to best use Milestone Templates, the Job Highlights Banner and the Milestone Performance Chart to enhance job management.



The goal of Milestones is to provide an easy and transparent method of tracking the status of all your jobs as they progress through each Milestone. By adopting this component of Assured JobCheck you will be able to utilize the Milestone Performance Chart to quickly see which jobs are on target to complete on time and which are at risk of falling behind.

In summary, the steps to utilize Milestones are:

1. Open the *Admin* tab and select *Milestones*.
2. Review each milestone task template and ensure that the default time-to-completion is suitable.
3. Start a new job and select the correct *job type* from the dropdown.
  - The corresponding milestone template will apply automatically and the first milestone task in the list will be assigned.
4. When appropriate, complete the first milestone task (either from the mobile app or the web desktop).
  - Completing the task will update the Job Highlights Banner with a time-stamp.
  - Upon completion of the first task, the next milestone task will be assigned.
5. Navigate to the *Home page* and view the Milestone Performance Chart to see the status of your job(s) with respect to completion of the milestone tasks.
6. Click on any part of the bar graph to filter jobs down and see which jobs fall into what categories: meeting standard, approaching standard or exceeding standard.
7. Investigate jobs that are approaching or exceeding standard to get them back on track.

The more expansive instructions to implement Milestones are as follows:

### **Step 1: Review Default Milestone Task Templates**

There are four milestone templates available under the admin tab: Emergency, Restoration, Contents & Other. These milestone templates are designed to apply automatically to a job when the corresponding *job type* is selected for a new job.

Each milestone task has a standard time set for completion; if you do not currently adhere to a standard for task completion, use the defaults. If you have a different standard for task completion, the defaults can be edited to fit your standards. Keep in mind that if different types of jobs require different standards, we recommend setting the template default to meet the tightest standard.

## Admin Tutorial

Within each milestone task template, there are 11 standard tasks that correspond to the 11 milestones that appear in the Job Highlights Banner. You can choose to deactivate specific tasks within each milestone template; however, you cannot delete or add tasks to the list.

Enable	Milestones	Stage	Target	Create Task
<input checked="" type="checkbox"/>	Received	Lead		
<input checked="" type="checkbox"/>	Customer Contacted	Lead	2 hours from Received	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Site Inspected	Lead	1 hours from Customer Contacted	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Estimate Submitted	Lead		<input type="checkbox"/>
<input type="checkbox"/>	Estimate Approved	Lead		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Set Target Completion	Production	1 days from Site Inspected	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Into Production	Production	1 hours from Set Target Completion	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Started	Production	1 hours from Into Production	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Completed	Production	from Job Target Completion Date	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Invoiced	Accounting	1 days from Completed	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Paid	Accounting	30 days from Invoiced	<input checked="" type="checkbox"/>

Figure 1 Above is the default emergency milestone template. Notice that by default, estimate submitted and approved are excluded from the tasks that will be applied to an emergency job.



Take note that milestone task templates and custom task templates work independently of one another. When creating custom task templates, be careful to ensure that you do not duplicate tasks that already exist in the milestone task template.

## Step 2: Apply a Milestone Template to a Job

When applying the job type to a new job in the job details section, the milestone template will apply automatically. The first milestone in the template will become due immediately and will remain 'active' in the task list until it is completed, at which time, the next task in the template will be assigned.

**Job Detail**

Job Name: 2014-11-WTR

Type of Job: --None-- (dropdown menu open showing: --None--, Emergency, Restoration, Contents, Other)

Office Admin: Laura Dombrosky

Project Manager: Greg Lehmann

Estimator: Cory Svensson

Accountant: Paul Winckers

Customer Information

Figure 2 The figure above demonstrates how to apply a milestone template to a job by selecting the corresponding job type in the job detail screen when creating a new job.

### Step 3: Complete a Milestone Task

Since milestone tasks and the Job Highlights Banner are directly linked, completing a milestone task (whether on the web desktop or from the mobile app) will update the Job Highlights Banner with a time-stamp of when that task or milestone was completed.

Since every milestone has a dependency, a milestone task will not be assigned to you unless the previous task has been completed.

### Step 4: Review the Job Highlights Banner

Milestone templates contain tasks that are directly linked to the 11 milestones in the Job Highlights Banner within a job; completing one of these milestone tasks will automatically update the Job Highlights Banner and create a timestamp of when the milestone was completed.

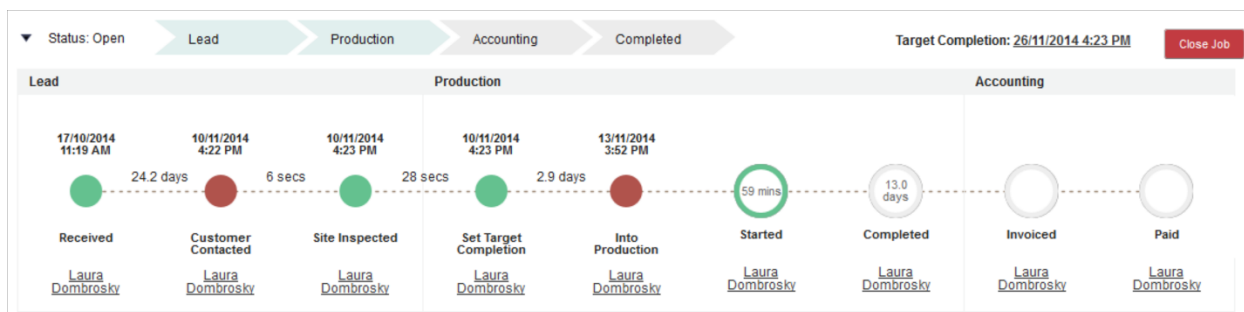



Figure 3 The Job Highlights Banner (above) shows milestones as green when completed within standard and red when exceeding standard; it also shows milestones that are pending and the time remaining to complete them.

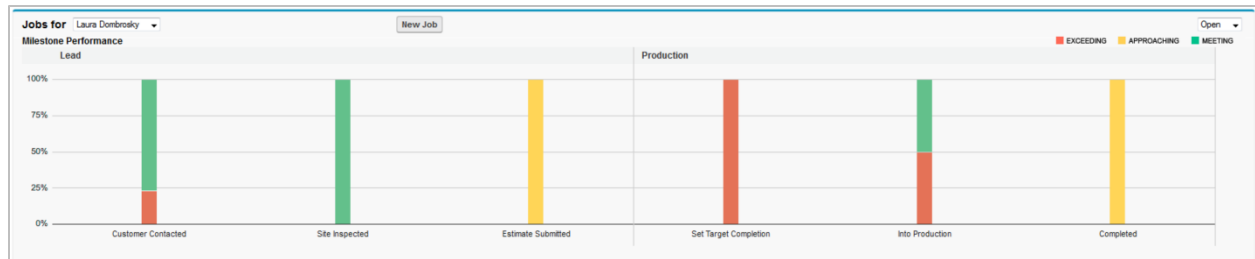


If milestone tasks for a specific job type have been de-activated, those milestones will not be visible in the Job Highlights Banner.

### Step 5: Review the Milestone Performance Chart for Actionable Jobs

The Milestone Performance Chart summarizes the performance of jobs with respect to actionable/active milestone tasks. A color-coded bar graph highlights the percentage of jobs that are pending milestone completion and indicates which jobs are 'meeting', 'approaching' or 'exceeding' your standards for completion.

Diligent completion of milestone tasks will lead to accurate milestone status when viewing the Milestone Performance Chart and an accurate performance indication in the Job Highlights Banner (as in Figure 3, above).



**Figure 4** The Milestone Performance Chart (above) indicates the percentage of jobs that are pending completion of each milestone. The colors indicate whether jobs are meeting, approaching or exceeding standards.

To see which jobs fall into each category, click on the colored portion of any of the bar-graphs to automatically filter the job list and show the jobs that are actionable in that category. *For example, if you were to click on the red portion of the ‘customer contacted’ bar-graph, the job list would filter to show only the jobs in which the customer had not been contacted and for which this task was overdue.*

**If you require assistance with updating existing task templates that conflict with the milestone task templates, please contact our support team at 1-877-277-9933.**