## assuredJobCheck™



## **Tutorial (All Editions: Premium, Professional & PackOut)**



# How To: View, Upload and Email Room Photos, Reports & Files

This tutorial will demonstrate how to view, upload, organize and share your photo and file attachments when accessing the job in a web browser.

Detail	Activity	Attachments	Inventory
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### **View General Photos, Room Photos and File Attachments**

All general photos and room photos are automatically uploaded to and can be managed in the *Attachments* tab.

#### **GENERAL AND ROOM PHOTOS**

General photos and room photos that are captured on the iPad with the Assured PackOut app upload to Job Attachments in a folder of the same name. If you are using multiple iPads to list in the same room, the photos will merge into one folder as long as the rooms are named exactly the same on all iPads.

#### REPORTS, PHOTO & FILE EXPORTS

Any inventory reports, photo exports or item/box labels that are generated for a job are automatically saved to the Job Attachments. A temporary link to the report is visible in the Export Queue allowing quick access for 24 hours; however, a copy of the file is always saved to Job Attachments.

#### How to Open Folders

By default Folders are collapsed and you might not see the attachments organized in the folder. Click the grey arrow icon (to the left of the check box) to view a folders contents.



#### How to Open File Attachments

Photo and PDF attachments can be opened directly in your web browser. Click a photo and it will open in the JobCheck photo viewer. Excel files will automatically download to your computer. (\*Make sure to enable Pop-ups for Assured JobCheck in your browser).

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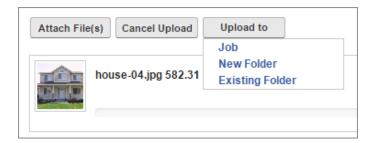
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### **Upload Room Photo or Job Attachments**

- 1. Log in to Assured JobCheck web app as any user.
- 2. Open the job that you would like to upload a file or photo into.
- 3. Click on the Attachments tab from the secondary navigation bar.
- 4. Click "Attach File(s)" and select the file or photo you would like to upload.



5. Click "Upload To" and select the folder location that you want to upload your file into.



Note: Selecting 'Job' will upload the photo/file to the attachments tab | Selecting 'Existing Folder' will upload the photo/file to an existing room or general folder | Selecting 'New Folder' will allow you to create a new folder for the photo/file.

## **Organize Attachments**

To help you manage your attachments, it is possible to organize files and photos into folders in the attachment tab.

1. From inside the job in the Attachments tab, click the 'New Folder' button.



- 2. A new folder will be created with the name 'New Folder'.
- 3. Click the pencil icon to rename the folder: the pencil appears when you hover over the folder.



4. Rename the folder and click *Enter* on your keyboard to save the change.

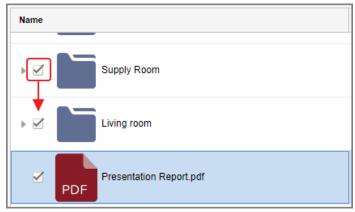
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### **Email Photos, Files or Report Attachments**

1. From the Job Attachments tab, select the photo, file or report you would like to share (email).

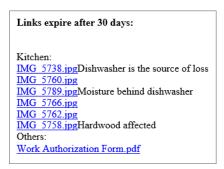


2. Click the "Email" button.



- 3. An email window will appear for you to type in the destination email, subject and email body.
- 4. Be sure to leave the default selection 'Attach as Link' selected; this will allow you to send files of any size without restriction.
- 5. Click 'Send'.

Your customer will receive an email from your email address which includes a link to view the file online and a description of each file sent (if available).



Note: Each email includes a disclaimer that the links expire after 30 days. If the email recipient clicks the link on the 31<sup>st</sup> day or later, it will no longer be an active link and you may receive a phone call telling you the report did not work. Simply follow the above steps to resend the link then encourage them to download and save a copy of the file to their computer for future use.

For additional support or assistance, visit our <u>online support portal</u>, contact our technical support team at 1-877-277-9933 or email us directly at support@assuredsoftware.com.