SITE[0]CAPTURE

Portal Admin Guide – Advanced Features



Table of Contents:

PDF Reports

Report Columns

Containers

Markets & Regions

Integrations

Configuring Additional PDF Reports

SITE[0]CAPTURE

With SiteCapture's PDF Report Configuration tool, you can customize the branding of your report, hide fields or show only specific sections, pick what information displays from your field groups, and where your photos show up (1).

The reports provided in your portal may vary, but the most common reports used with advanced features are the Managed Line Item report and the Full Photo and Data report (2).

We recommend starting with the Managed Line Item report when working with dynamic field groups.

ort Config	uration Tool	Report 2					
Edit Report Confi Name	iguration						
Full Photo and Data Report			Select report				
Branding Company Logo	Branding		✓ Managed Line Item				
File Name Color	Company Logo		Full Photo and Data Report				
Header	The logo displays at the top of the first page. Configure in Settings. Note the	nat a Report Logo set in your template will always override a company logo.					
Report Title Display Info	Logo Size	Logo Position	User role				
Table of Contents	Medium ~	Left ~	Admin				
Body Fields			Admin				
tems Field Options	File Name		Testade the second states				
Photos Photo Layout	Available variables: {displayLine1}, {displayLine2}, {displayLine3}, {displayLine3}	ine4}, {displayLine5}, {status}, {templateName}, {reportTitle}, {date}, {time}	Include these photos:				
tem Table Photos	Enter filename variables		All				
Photo Options	e.g. My_report_{displayLine1}-{date} .pdf						
Advanced	e.g. My_report_{displayLine1}-{date}						
Specify Sections Exclude Fields			Timestamp photos				
	Color						
	Set colors by using any browser supported color name or Hey value		Cancel	Get Report			

SITE O CAPTURE

Report Columns

Report Columns are used to name and group data sets from custom fields you create as part of your dynamic field groups. These show up as the column headers when you are viewing your work using the Manager. There are also existing report columns associated with the estimating features in SiteCapture.

Report Columns need to be created first in the Settings area of the product and then they must be selected and set in the individual fields that make up each dynamic field group. Some Report Columns are set by default and cannot be changed. Those include the service selection fields, unit fields, and estimate/line-item cost fields.

You can select one report column for different fields if you want all of the data entered to show up in one column. For example, if you have a field called "Exterior Work Notes" in one group, but called "Living Room Work Notes" in another and you want all those types of notes to show up in one column you can just call the column work notes and select that for every applicable field in each field group.

View Field Settings Field Name Exterior Work Notes Default Text Description Exterior Work Notes Field Kev exterior_work_description Field Type Long Text Validation Type Neither photos nor explanatory comments are Workflow field No Special Logic Report Column Work Notes \checkmark ★ Required Admin Only Photos Allowed Comment Allowed Copy this when copying projects Display in field group header \vee is Conditions Display when Always hide from Customer Always hide from Field User Done

Report Columns Article

Containers

If you have containers in your SiteCapture portal, you will see two different tabs at the top of your SiteCapture web app portal, like Properties and Work.

The container feature provides a parent child relationship where the container is the parent and therefore all the different work that is performed under that container is housed under it. The container is usually something with a unique address or identifier like a property, a project or a job site.

The template(s) associated with the container type will have set fields that copy down from the container to any work you create attached to the container as long as you have fields with matching field keys. You will also need to ensure that you set your work types to be "contained" for work you want to create under the containers.

Containers themselves are not visible on mobile and cannot be accessed or edited by vendor companies or field users.

Create New Work and Attached to Container Article

All Properties / 5903 S Winds	star St					
5903 S Windstar St Spokane, WA 99224 Single Family Home Spokane	Property Info Property Phot					
Property Information						
<table-of-contents> Reno Initial Estimates</table-of-contents>	7 > Property ID WA40059 5 >					
Reno Punchlists						
Turn Initial Estimates	Renovation Initial	ESTIMATE	Property Information			
Turn Scoped	Bid/Estimate w/					
Turn Punchlists	Inspection 5903 S Windstar St	Q	Template			
Inspections	Spokane, WA 99224 \$9992.50		Renovation Initial Bid/Estimate			
Work Orders	Property Information		Property ID			
Move Ins/ Move Outs	Exterior	1	WA40059			
Resident Self Inspections	Interior Paint					
	Entry		Property street address			
	Living Room Dining Room		5903 S Windstar St			
	Kitchen					
	Primary Bedroom		City, state and zip			
	Bedroom 2 Bedroom 3		Spokane, WA 99224			
	Bedroom 3 Bedroom 4					
	Bedroom 5		County			
	Primary Bathroom		Spokane			
	Bathroom 2					
	Bathroom 3 Bathroom 4		Property Type			
	Ganaral Interior		Single Family Home			

General Interio

SITE O CAPTURE

Markets & Regions

Working in several markets and/or regions? Easily group and organize your work in SiteCapture by setting up your regions (if applicable) and markets in SiteCapture.

Portal admins and manager users can add and manage markets and regions, as well as set them on projects. They can then be used to filter and sort work, set up market-based pricing, and assign vendors to specific markets.

Markets can be grouped by Regions, but that is optional. If you only have markets, you do not need to set up regions.

When using estimating features, markets can also be added to the service database to ensure correct market based pricing applies to projects based on the market settings.

Markets & Regions Articles

[0] **Properties** Work Northwest ★ VIEWS < ... FAVORITES Assigned All Status All • • 7 All Properties Title & Description West 3 902 N D St PROPERTY Northwest Coeur D Alene, ID 83814 1 Single Family Home Northeast VIEWS Work < ... FAVORITES -20 Selected Assign Due Status More... VIEWS ¬ 77 All Work Set Customer Archived Prop Title & Description Updated Nolan Field Tech's Work 25 Set Manager **Renovation Initial Bi** Reno Initial Estimates 20 902 N D St \checkmark Coeur D Alene, ID 83 Set Market ... Reno Scoped 17 Northwest - Spokane Jane Field Superviso Add Tags... **Reno Punchlists** 1 2/1/23 12:55 P Move In Self Inspect Remove Tags.. \checkmark 5903 S Windstar St VIEWS -Spokane, WA 99224 Sarah Smith Batch Export PDFs... Turn Initial Estimates Northwest - Spokane Batch Send to Recipients... Turn Scoped **Basic Photo Inspect** 902 N D St **Turn Punchlists** Archive Coeur D Alene, ID 83 \$0.00 Inspections Permanently Delete... Northwest - Spokane Jane Field Superviso Work Orders Move Ins/Move Outs New Basic Photo Inspection - Soft Scope 14 days 5903 S Windstar St 1 Spokane, WA 99224 Custom \$0.00 Archives Northwest - Spokane

SITE[0]CAPTURE

Markets & Regions

SITE[0]CAPTURE

Set up your markets and regions by clicking the gear in the top right corner of your SiteCapture web app portal and selecting Markets and Regions.

Make sure you add a name and key for your market/region and check the box to enable that market/region. *You may find it easier to have the name and key the same for each market/region.

If you're setting up market-based service pricing, you will use the market key in the market column in your service database spreadsheet. You will need to create separate service items for each market.

Markets and Regions											
Regions		+ Add New Region	Markets				+ Add New Market				
Name	Кеу		Name	Enabled	Key	Region					
Northeast	Northeast		Atlanta	•	Atlanta	Southeast	ľ				
Southeast	Southeast	Ľ	Boston	•	Boston	Northeast	Ľ				
Northwest	Northwest	ľ	Charleston		Charleston	Southeast	ľ				
West	West	Ľ	Chicago		Chicago	Central	ľ				
Southwest	Southwest	Ľ	Dallas	•	Dallas	Central	ľ				

Markets & Regions Articles

Integrations

SiteCapture offers several ways to integrate. We have a productized integration with Salesforce.com, we are available for app to app integration via Zapier and we also have an open REST based API that Premium customers can access for building their own integrations.

Our "ready to use" Salesforce integration allows you to push and pull data from SiteCapture and Salesforce within some prescribed workflows. Check out this <u>quick video</u>: (can we redo this video?)

More advanced functionality can be developed between Salesforce.com and SiteCapture using Zapier or via an integration created by our customers using our API.

Zapier integration allows you to set up zaps to connect SiteCapture to thousands of apps.

<u>API Integration Article</u> <u>Salesforce Integration</u> <u>Zapier Integration</u>





Additional Support

Visit our support site for additional support articles and videos: <u>https://sitecapture.zendesk.com</u>

For technical support, email support@sitecapture.com