SITE [O] CAPTURE

Portal Admin Guide – Advanced Features

Table of Contents:

SITE[◎]CAPTURE

Configuring Additional PDF Reports

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.

Report Configuration Tool

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.

Report Columns Article

View Field Settings

Field Name	Exterior Work Notes
Description	Exterior Work Notes
Field Key	exterior_work_description
Field Type	Long Text
Validation Type	Neither photos nor explanatory comments are
Workflow field	No Special Logic
Report Column	Work Notes

Default Text

☐ ★ Required
☐ 🔒 Admin Only
☐ 📷 Photos Allowed
☐ 💬 Comment Allowed
☐ Copy this when copying projects
☑ Display in field group header

Conditions   Display when _____ is

☐ 🖼 Always hide from Customer   ☐ 🚶 Always hide from Field User
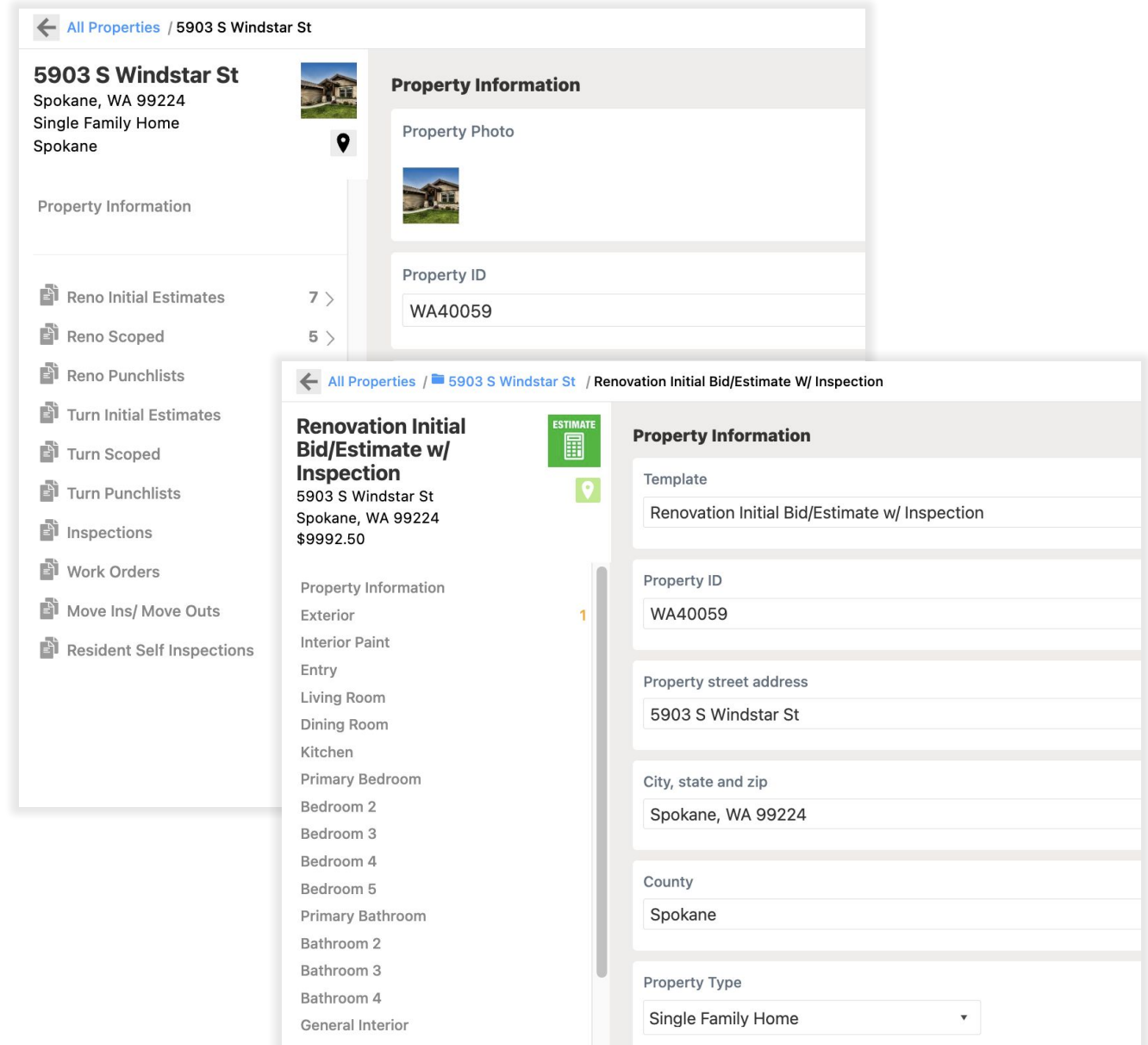
Done

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](#)
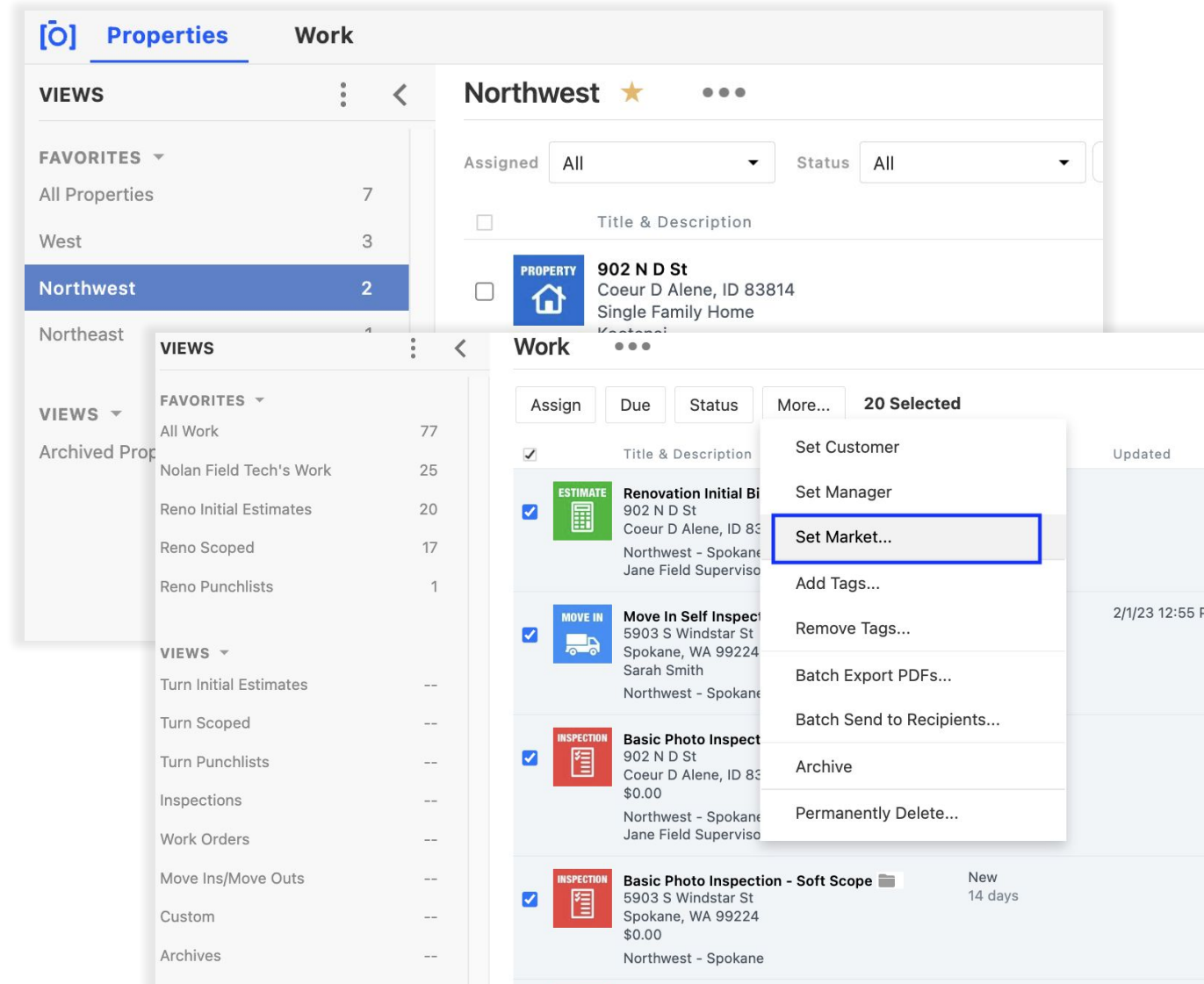
Markets & Regions

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

Markets & Regions

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

Name	Key	
Northeast	Northeast	✎
Southeast	Southeast	✎
Northwest	Northwest	✎
West	West	✎
Southwest	Southwest	✎

Markets
⊕ Add New Market

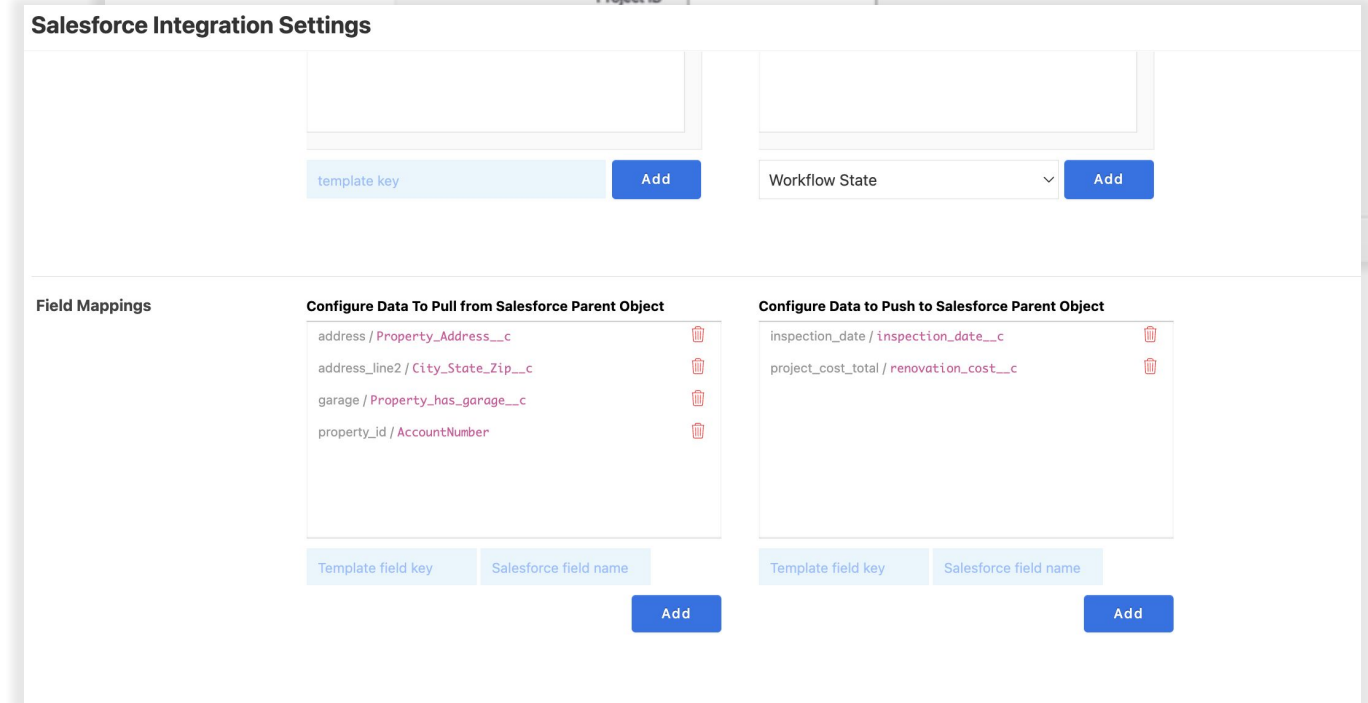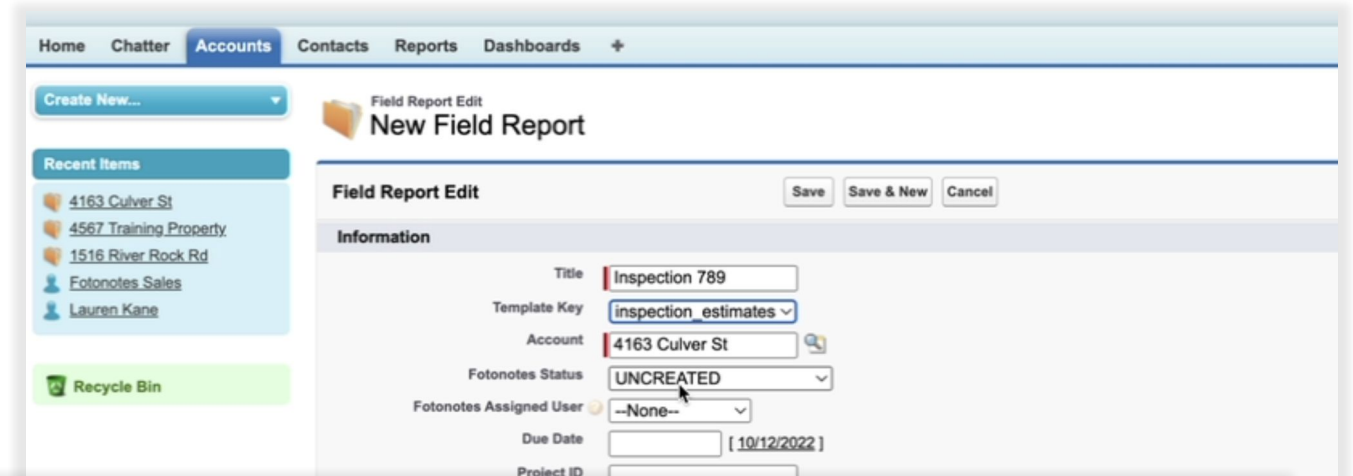| Name	Enabled	Key	Region	
Atlanta	🟢	Atlanta	Southeast	✎
Boston	🟢	Boston	Northeast	✎
Charleston	🟢	Charleston	Southeast	✎
Chicago	🟢	Chicago	Central	✎
Dallas	🟢	Dallas	Central	✎

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 quick video: **(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.

API Integration Article
Salesforce Integration
Zapier Integration

Additional Support

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

For technical support, email support@sitecapture.com