# USER GUIDE
in4mo Contractor

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SOLERA | in4mo

## About in4mo Contractor

in4mo Contractor offers a range of extra benefits not available to other companies using in4mo. Two of the most important advantages are:
- Contractor companies can monitor and maintain all the insurance company tasks assigned to the company, through one and the same portal. Contractors who do not have the Contractor program in use, must log in separately to each insurance company portal. With in4mo Contractor you can easily view the cases of different insurance companies from the same portal.
- With in4mo Contractor Pro it is also possible to create your own cases, meaning that it is possible to use in4mo also for projects not received from an insurance company in in4mo. This is something we get back to in more detail later in this guide.

Once you have access to the in4mo Contractor portal, you should no longer log in to the separate insurance company portals.

The diagram below illustrates the difference between using in4mo with and without Contractor, in terms of how Contractor customers only have to log in to one portal, instead of separately logging in to each individual insurance company. This also means that for those using the in4mo Task Reporter app, there is no need to change between different accounts, and when making changes in office- or user information, this only has to be done once, rather than in every insurance company portal your company uses in4mo.



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Version 13.4　　　Solera | in4mo | support@in4mo.com | www.in4mo.com
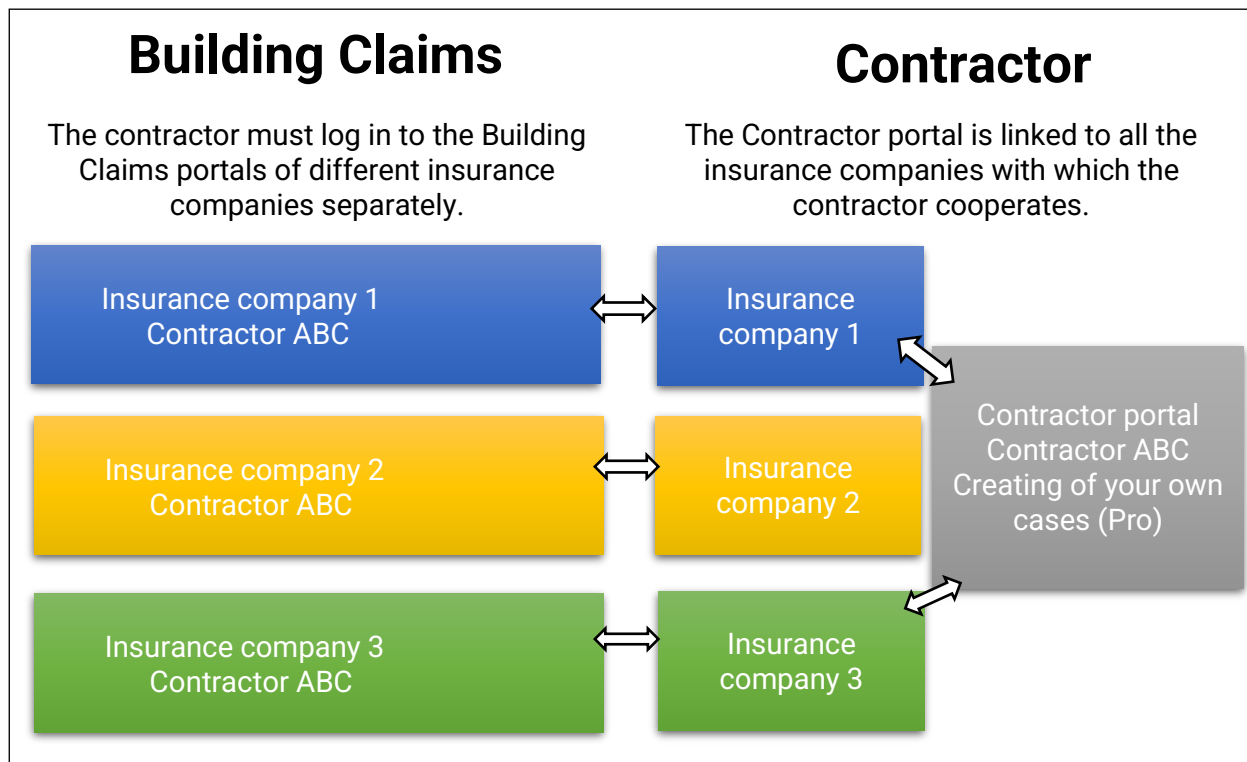
## Case List

The case list is where you find all cases assigned to your company. Above the case list you will see a separate tab for each connected insurance company, and for Contractor Pro customers there's also an own tab showing your own company name. This is where you find your own cases. The currently active case list is highlighted with an orange colour. To open a case, simply click on it.



By default, the cases are shown in a list, however it is also possible to show cases on a map, where the cases are marked with orange dots. It is possible to zoom in and out on the map, and to click on a case to open it.

Whichever task type you have selected from the dropdown menu next to **Information** affects the information shown in the case list. Both the status shown in the case list, as well as the **Assignee** column, show information for the task type selected above the case list.

This button is visible for users who have the setting **Able to create case?** activated and is visible when having the tab for the company's own cases open. This button is used for creating new cases. This will be described more in detail later in this guide.



The case list shows different kinds of information about the cases under different columns. **Status** shows the status of the selected task under **Information** (see above), **Address** shows the address to the damage site, **Assignee** shows which company and person are responsible for the task selected under **Information**, ID / Handler shows the case ID and name of the case handler, while **Last activity** shows when there has last been activity in the case. By default, the case list

displays cases in order of last activity, with cases with the latest activity being shown on top of the list. It is however possible to order the list by any of the columns displayed in blue text. There's an arrow next to the currently selected column, as can be seen next to **Last activity** in the screenshot above.
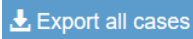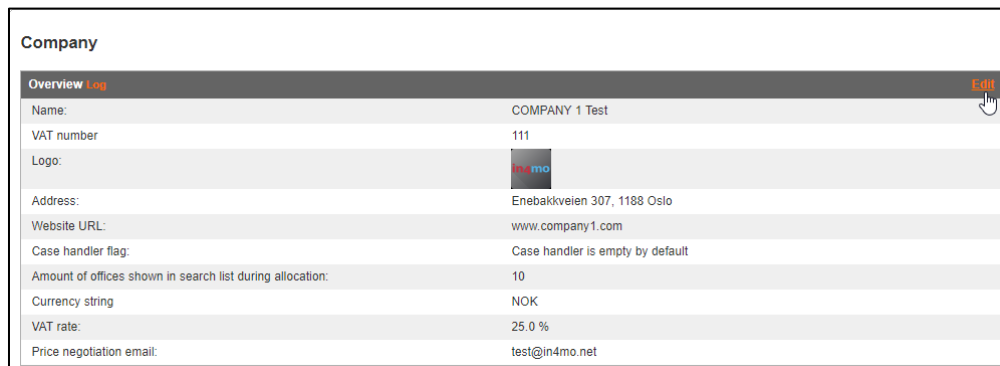
**Export all cases** At the bottom of the case list there's a button called **Export all cases**. When clicking this button, the current case list will be exported to a .csv file, which can be opened in a spreadsheet program, such as Microsoft Excel. The file will contain all cases currently shown in the case list, meaning that it follows filtering in the same way as the case list.

## Settings

The portal settings are found under **Company admin** and are available to users with authority level 4 or 6. For the most part the company admin settings work the same way in Contractor as in Building Claims, but there are some notable differences, which will be explained in this chapter. For general settings, please refer to the **Company admin** section on our support pages.
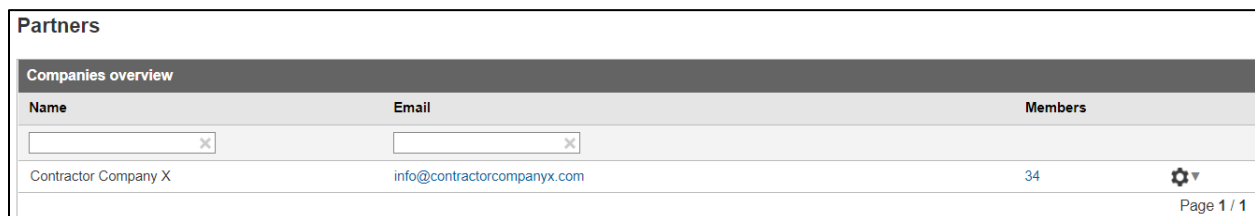
## Company Settings

The company settings are found under **Company admin** -> **Company** -> **Overview**. Here you can define the logo of your Contractor portal (shown in the top left corner of the portal as well as on the login page) and maintain settings that affect your own tasks by clicking the **Edit** button.

| Company | |
|---|---|
| **Overview** Log | Edit |
| Name: | COMPANY 1 Test |
| VAT number | 111 |
| Logo: | in4mo |
| Address: | Enebakkveien 307, 1188 Oslo |
| Website URL: | www.company1.com |
| Case handler flag: | Case handler is empty by default |
| Amount of offices shown in search list during allocation: | 10 |
| Currency string | NOK |
| VAT rate: | 25.0 % |
| Price negotiation email: | test@in4mo.net |

## Partner Settings

The partner settings are found under **Company admin** -> **Partners**. To edit these, click on the cogwheel to the right of your company, then click **Edit**.

| Partners | | | |
|---|---|---|---|
| **Companies overview** | | | |
| Name | Email | | Members |
| | | | |
| Contractor Company X | info@contractorcompanyx.com | | 34 |
| | | | Page **1** / **1** |

Here you can find company information. Here you can add your business ID, company email, a standard logo, disclaimer and report footer, which can then be used for the offices. It is also from these settings that you select a price manager, which is the user who has access to the iCC settings for the company. Finally, you can select whether an email notification should be sent

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whenever an office is assigned to a new task, or whenever an inspector has been selected. These notification settings are universal, meaning that they affect all offices, and the notifications are sent to the email address of the office assigned to the task/from where the inspector is assigned.

**Edit partner information**

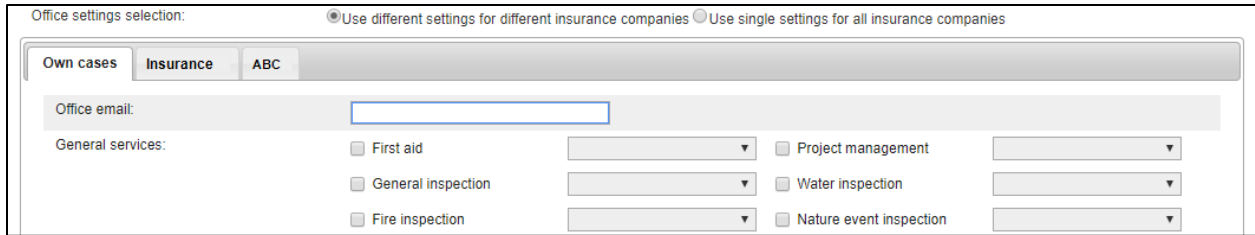| | |
|---|---|
| Name: | Contractor Company X |
| Business ID: | |
| Email: | info@contractorcompanyx.com |
| | ☑ Send a notification to the office's email when a task is assigned to the company's office. |
| | ☐ Send email when inspector is selected |
| Accounting email: | invoice@contractorcompar |
| Divided into sections: | No |
| Logo: | Velg fil   Ingen fil valgt |
| Disclaimer: | |
| Report footer: | |
| Price manager: | Erik Contractor ▼ |

Save changes   Cancel

## Office Settings

The offices settings are found under **Company admin** -> **Offices**. From here you can add new offices and make changes to office information, including contact information, automatic member choice, office description, report footer, disclaimer and logo, as well as what kind of tasks and expertise the office offers and the availability status for the office and (if in use) which section the office is located under.

To add a new office, click **+ Add new office** in the top right corner.

**Download partner list(CSV file)**   **+ Add new office**

In the window that opens, fill out information about the office. What is worth noting here, is that it is possible to choose whether to use the same settings towards all insurance companies, or to use separate settings towards different companies. The information that can be different towards different insurance companies includes the office email address, the offered services, expertise, the automatic member choice (if using separate automatic member choice per office) as well as the office availability. If you wish to use separate settings towards different insurance companies, select **Use different settings for different insurance companies** under the setting **Office settings selection**. If you wish to use the same information everywhere, select **Use single settings for all insurance companies**.

## Member Settings

### *Authority and User Levels in in4mo Contractor*

The authority level a user has affects what the user can see and do in the portal. In in4mo Contractor users can have one of six authority levels. What kind of permissions each authority level gives is explained below.

**Authority level 1**

A member with authority level 1 can see and edit their own cases, meaning that they only have access to cases in which they have been assigned a role. These members can also access their own calendar and the support page.

**Authority level 2**

In addition to the permissions mentioned above, a member with authority level 2 also has the possibility to see and edit cases in which they have not been assigned a role.

**Authority level 3**

In addition to the permissions mentioned above, a member with authority level 3 also has the possibility to assign tasks to other members of the company.

**Authority level 4**

In addition to the permissions mentioned above, a member with authority level 4 also has limited access to the Company admin page, where they can maintain member and office information. If sections are in use, they have access to members and offices from their own section only.

**Authority level 6**

In addition to all rights mentioned above, users with authority level 6 have full access to the Company admin page. Users with authority level 6 also has access to all cases, offices and members, regardless of sections, if in use. There will be some differences in what kind of options administrators find under the Company admin page, depending on whether they are using Contractor Pro or Contractor Lite, and there may also be some differences depending on what features are activated in the portal.

**Lite member**

As a Lite member, you have limited access rights that are almost the same as authority level 1 (Lite member can only see and edit cases that are assigned personally to this user), however a lite member cannot be assigned to inspection or project management tasks. This role is thus meant for craftsmen who mainly use in4mo for reporting on craftsman tasks, and have no need for inspection or project management tasks.

## Internal Messages in the Chat Room

There are two separate views in the chat room. In the insurance company cases, messages written in the left view **Chat room** are visible to all members of your company, members from the insurance company and members from other companies involved in the case. Messages written in the **Internal notes** view to the right, however, are only visible to members of your company, so you can write things there you do not wish to share with everyone.

In your own cases, the members of your company can see all the chat messages, but you can record case information (Internal notes), that are not actually chat messages.
Only the users/roles that the sender of the message selects as the recipient of the message, as well as those who have manually selected to subscribe the chat, will be notified of new chat messages. The same logic applies to internal notes. So, you can follow the general chat and/or internal notes of a case separately.
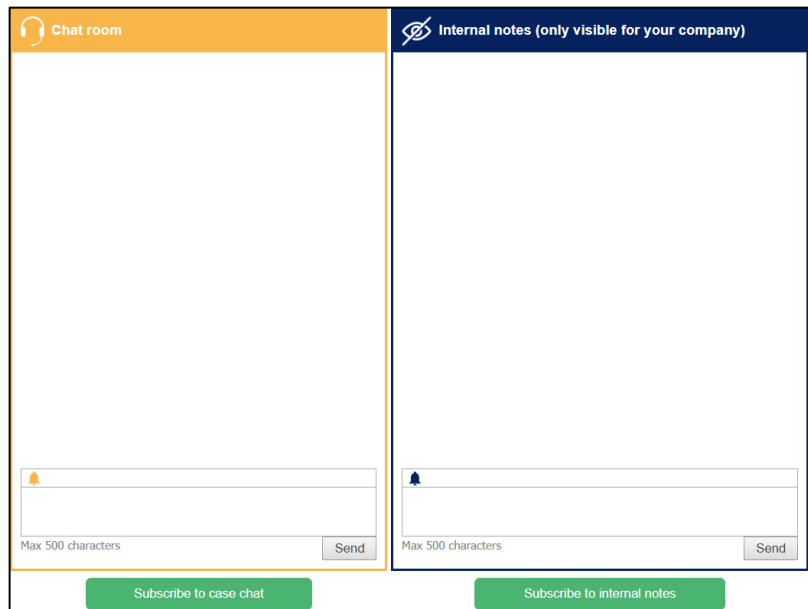


## Sections

With the **Sections** feature it is possible to divide the company into different sections, which affects what content users have access to. When sections are in use, users will only have access to cases assigned to offices in their own section, and users with authority level 4 will only have access to members and offices in their own section on the company admin pages. Company administrators (level 6) have access to all cases, members and offices.
The sections feature is deactivated by default and can be activated by in4mo.

When the **Sections** feature is activated, there will be an additional category in the menu in the company admin pages called **Sections**. By default, there will be a section added already with the company name, where you will find all offices in the portal.

To add more sections, click the **+ Add section** on the top right side. Input a name for the section, select whether it should be invoiced separately or not (ticking the yes option gives the possibility to add specific invoicing information for the section). Click **Save** when you are ready. The section will then be added to the sections list, without any offices added to it. You can see how many offices are located in a section from the sections list by looking at the column **Number of offices**. By clicking on a number from this column you will see a list of all offices added to the section.



To add an office to a specific section, go to **Company admin** -> **Offices**, find the office you wish to move, click the cogwheel on the right side, then click **Edit**. You will find a setting here called **Section**, where you can select a section from a dropdown menu containing all the sections added to the portal. Remember to save when you are ready.

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## Reports

With Contractor you get access to a range of different statistics reports. The different reports can be found under the Company admin pages under the category **Reports**. We have an own user guide for the reports, which you can find here.

# in4mo Contractor Pro

in4mo Contractor Pro comes with several additional features in addition to those available to Contractor Lite customers. This chapter explains features only available to Contractor Pro customers.

## Own Cases

With in4mo Contractor Pro it is possible to create own cases. Own cases are shown in an own case list which shows the company's name.

## Creating Cases

To create a case, go to the case list view and click the **+ New case** button. This opens a window where case information is entered. This button is only visible to members who have the authority to create a case, which is given from the member's user profile under **Company admin** > **Members**.

Once you have entered the address of the damage site you confirm it by clicking **Validate** so that the map feature can locate the destination correctly and calculate the distance from the office.

Enter the contact information for the contact person. You can add more contact persons by clicking the blue **+** button.

The **Short description** box must contain a description (max. 1000 characters) of what has happened. Please note that the information you enter in this field is visible to the customer. Any additional information can be added in the **Notes** field if necessary. The information you enter in this field is not visible to the customer.

Once you have defined the dates (**Damage happened**\* and **Claim notification**\*), you can add/delete tasks at the bottom of the view and assign tasks to the offices you want.
The portal automatically calculates the distance between the offices and the damage site, which is reflected in the choice of offices. When you are ready, click the **Add** button to create the case. The new case appears first on the company's own case list.

## Handling Cases in Contractor

The top-most part of a case contains case information, such as the address to the damage site, name and phone number to the contact person, information about the case handler, case ID, an option for granting customer access, and case level actions in **Case action** and **Case continuation**.



**Case action** – There are three possible case actions: **Hold, Close** and **Abort**. When putting a case on hold, the status of the main inspection will be surrounded by a grey square ![4]. This can only be done when the inspection is in status 4. While the case is put on hold, registered case times, shown under Milestones for the main inspections as well as in various statistics, are put on hold. When a case is put on hold, the **Hold** button is replaced with an **Unhold** button, which removes the grey square. When clicking **Close**, you can close the case. This is done when the case is done and there is no longer any need for further action. **Abort** is used to abort a case, which is used if you are not going to handle the case after all. Closed and aborted cases can be seen in the case list by using status filters.

**Case continuation –** There are three possible case continuation actions: **Accept**, **Reject** and **Extra info needed**. When clicking **Accept**, the status of the main inspection changes to ![A] , and craftsman tasks (e.g. carpentry work or demolition) will appear in the Task Reporter app, and it

will be possible to start such tasks. When clicking **Reject**, the status of the main inspection Ⓐ, meaning that you are not planning to continue with the case, and if any craftsman tasks have been added to the case, they will be removed automatically, as well as any work item added for these tasks. When clicking **Extra info needed** (available when the main inspection is in status 4),
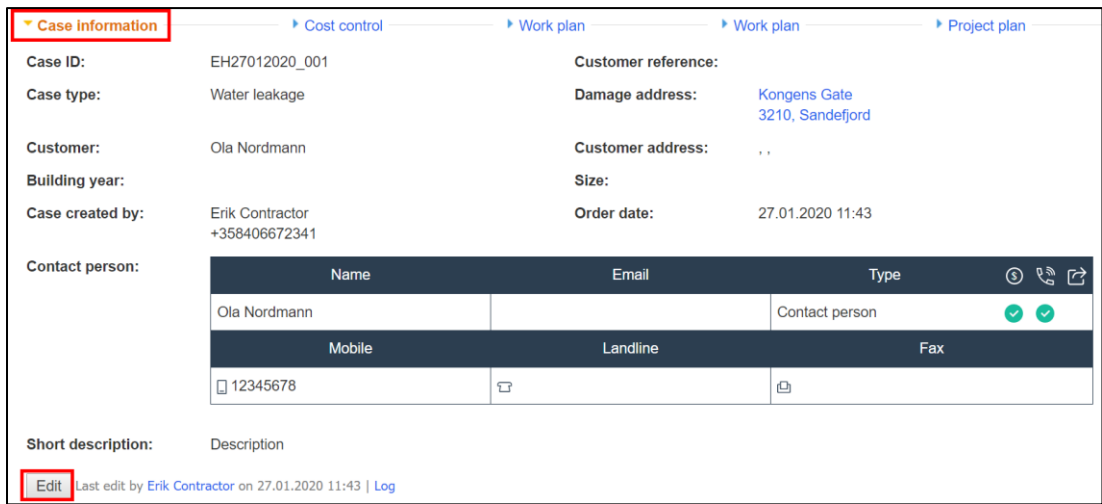
the status changes to ④ . When clicking the button, you have to specify what kind of extra info is needed. This given reason can be seen in the case chat, as well as in the case continuation log. When you have made a continuation decision, it is possible to revoke this decision in order to make another decision.

**Case continuation:** No Undo Log

When revoking a negative continuation decision, you will get the opportunity to recreate the work plan that was removed when the negative decision was made, or you can undo the decision without doing anything about the workplan.

**Continuation decision**

◉ Undo continuation decision and recreate work plan

○ Undo continuation decision without workplan

**Undo**    **Cancel**
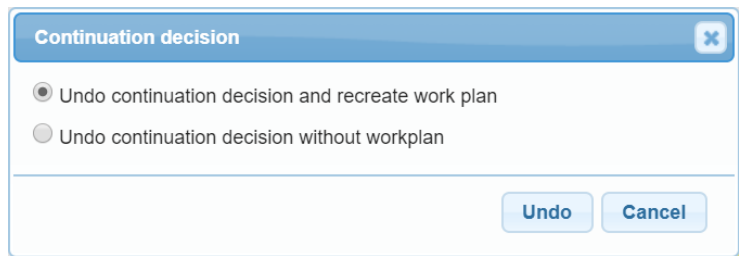
Under the tab **Case information** you can see more case information, and also make changes to the case information by clicking the **Edit** button.

| ▼ Case information | ▸ Cost control | ▸ Work plan | ▸ Work plan | ▸ Project plan |
|---|---|---|---|---|

| | | | |
|---|---|---|---|
| Case ID: | EH27012020_001 | Customer reference: | |
| Case type: | Water leakage | Damage address: | Kongens Gate 3210, Sandefjord |
| Customer: | Ola Nordmann | Customer address: | , , |
| Building year: | | Size: | |
| Case created by: | Erik Contractor +358406672341 | Order date: | 27.01.2020 11:43 |

Contact person:

| Name | Email | Type | ⓢ ☎ ↗ |
|---|---|---|---|
| Ola Nordmann | | Contact person | ✅ ✅ |

| Mobile | Landline | Fax |
|---|---|---|
| 📱 12345678 | ☎ | 🖨 |

Short description:    Description

Edit Last edit by Erik Contractor on 27.01.2020 11:43 | Log

On the left side of the screen, you can see a list of the tasks added to the case (see blue box below), showing the status of the tasks. Below the list of tasks, you will find three boxes, **Add/remove case tasks**, **Assign partner** and **Assign members** (see red box below).
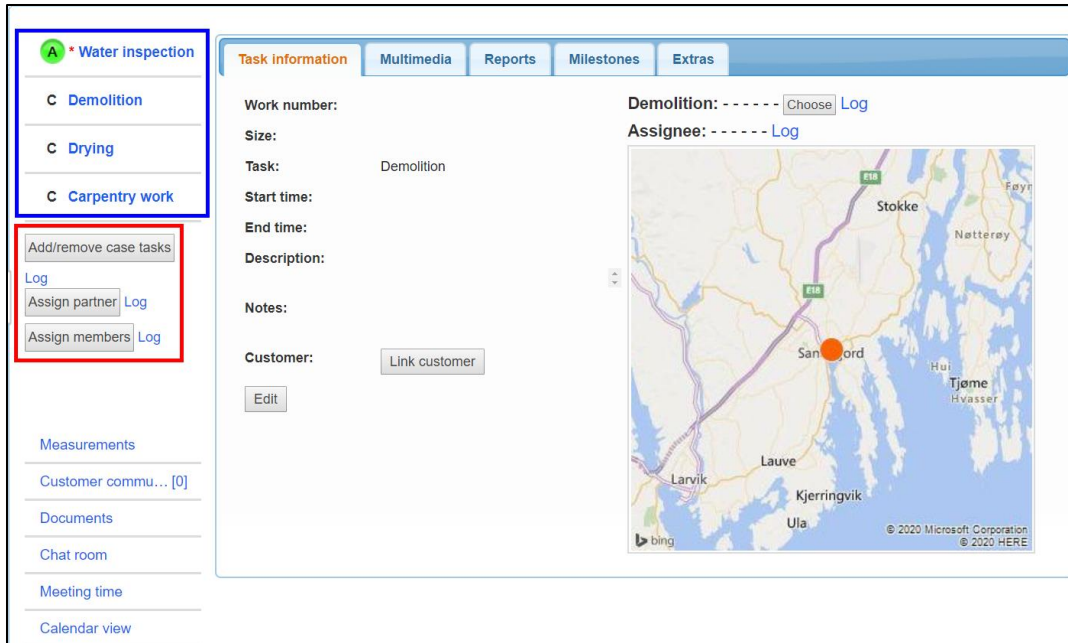
When clicking **Add/remove case tasks**, a pop-up window appears listing all tasks in the system, both standard tasks, and your own custom tasks, if any such have been added. Select the tasks you wish to add to the case, then click **Save**. To remove tasks, simply remove the tick for the task(s) you wish to remove and click **Save**.
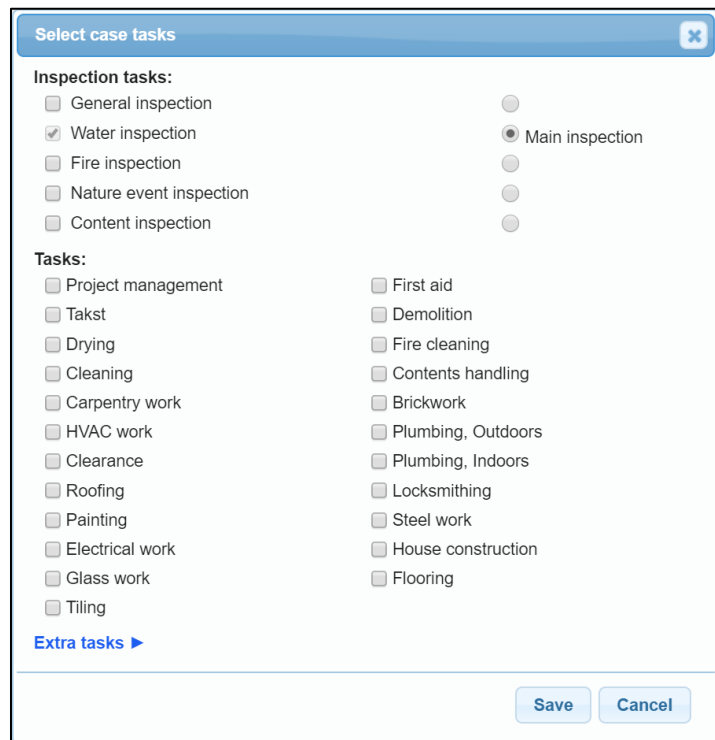


The first thing you have to do with tasks when they are added is to assign them to an office. This is done by clicking the **Assign partner** button. A window opens where you select which task(s) you wish to assign. If you wish it is possible to use filters for expertise, meaning that only offices which have defined the selected expertise(s) will appear in the office list to the right, i.e. if ticking the filter for geology expertise, only offices which have this expertise defined in their office settings will appear in the office list.

Once you have selected the tasks you wish to assign and selected the wanted office, click **Save** in the bottom right corner.



When the task(s) have been assigned to an office, you can assign the task(s) to one or more users, as well as setting start and end times for the tasks. When both responsible and times have been set, the task(s) will move to status B++, which means that they can be started.



## Starting and Ending Tasks from the Web Portal

It is possible to start and end tasks from the web portal. There are separate settings for inspections and other tasks, meaning that it is possible to only allow craftsman tasks to be started from the web portal, only inspections, or that it should not be possible to start any tasks from the web portal. These settings are set by in4mo. Tasks are started and finished under **Task information**.
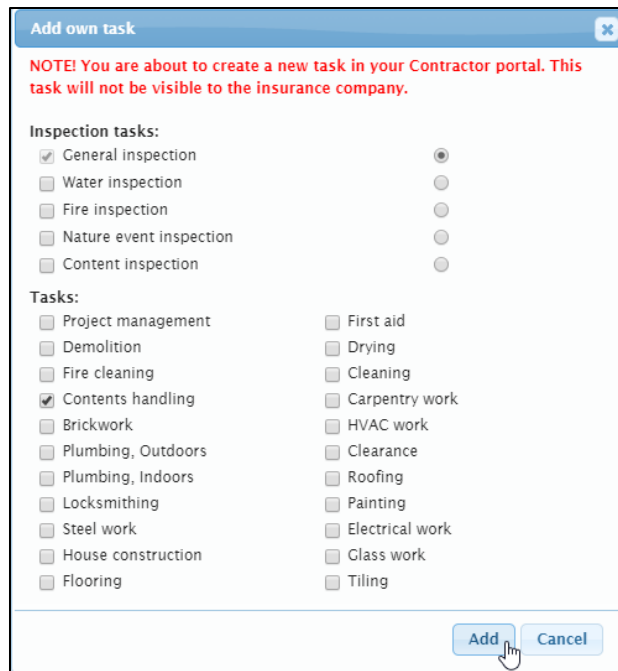
Inspection task:
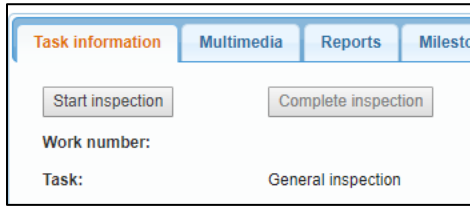
Craftsman task:
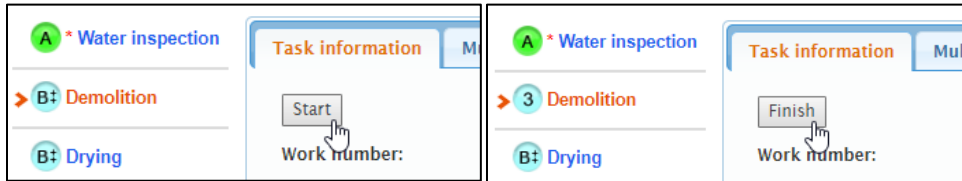
## Copying an Insurance Company Case to Your Own Case List

With Contractor Pro it is possible to copy cases assigned from an insurance company to your own case list. This is done by clicking the **Add own task** button on the left side of the screen.

This opens the view below, from which you can select the tasks you want to add to your tab.

The main inspection that is in status C, will be automatically added to your portal which means you can do your own inspection, but you can also leave the inspection at status C and continue with your own task.

Now there is a new case in your case list, where all the tasks are in status C. These tasks can now be assigned to the office and person responsible of your choice. This information is not visible in the insurance company case.

The Case ID is the same as in the insurance company's portal, but the end of the ID has been added with a -1. On the left side of the case you will find the Insurance case button, which you can use to navigate back to the insurance company case. Similarly, in the insurance company case, there is a button Own case, which navigates you to your case.

## Creating Your Own iCC Case from an Insurance Company Case

Insurance company cases also have a button that lets you create your own iCC case of the insurance company case. This feature allows you to create for yourself a parallel case of insurance company cases where iCC is not in use. The button creates a case on your own tab that has the same information as the case on the insurance company tab, so you can create a work plan with the right information in the case. In the mobile application you can also see both cases, your own and the insurance company case.
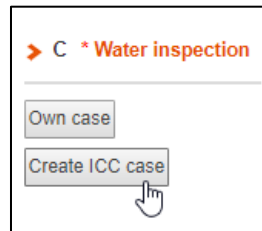


By clicking the Create iCC case button, the next thing to do is to select a price category that will be used to calculate case prices. The options here are either a predefined customer category or a default price category.

## Customer Profiles

It is possible to create different customer profiles for customers, which provides easy access to customer information when creating more than one own case in in4mo from the same customer. In



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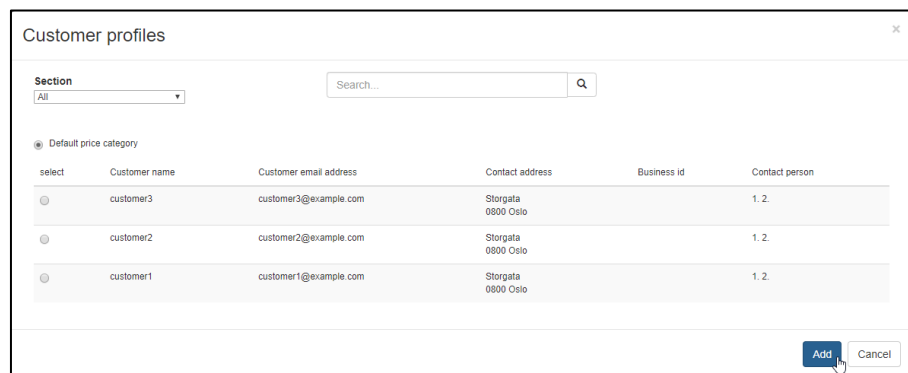
other words, if you receive more than one job from the same customer and wish to use in4mo to report for these cases, you can add a customer profile in in4mo for this customer, so that when you create a new case from this customer, some information will already be pre-filled, and it will also be easy to find cases received from this customer.

To access customer profiles, click **Customers** from the menu bar on top of the screen.

| Chat history | Customers | Statistics | Company admin | Support | Certification | Sign out
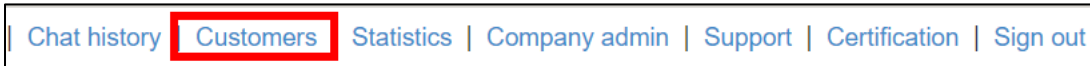
The customer profile page will then open. Here you will see all customer profiles already added as well as having the possibility to add new customer profiles. There is a search field you can use for searching for a specific customer, and it's possible to import and export customer profiles. When exporting customer profiles, an .xlsx file (Excel file) will be opened or saved on your computer, containing information about all customer profiles added to the portal. Using the same excel format, it is possible to import customer profiles. If there are problems with the import, the page **log** will explain why the import failed.

### Customer profiles

| Customer name | Customer email address | Contact address | Business id | Contact person |
|---|---|---|---|---|
| Customer 2 | customer2@customer2.com | Kongens gate 3210 Sandefjord | 87654321 | Custard Customer |
| Customer 1 | customer1@customer1.com | Odins gate 3216 Sandefjord | 12345678 | Erik Customer |

Search... | + Add new customer | ⬆ Export customer profiles | ⬆ Import customer profiles | Log

## Custom Tasks

It is possible to add own custom tasks which can be used in own cases. Custom tasks can be added to own cases in the same way as any other standard task. To add an own task, go to **Company admin** pages, and under the category '**Company**', click on '**Tasks**'. Here you can see all standard tasks, in addition to own custom tasks added. By standard all tasks are shown, however, it is also possible to show only standard tasks, only own custom tasks, or show and add report templates to customer profiles. To add a new custom task, click '**+ Add custom task**' up to the right.

**Company ▼**
- Overview
- Company usage policy
- Case time
- Office hours
- **Tasks**
- News
- Contractor catalog

**Customer page configuration**
**Dashboard setting**
**Partners**
**Offices ▶**
**Members**
**Report templates**

### Tasks

+ Add custom task (Available 5/5)

All | Standard | Custom | Customer

| Type | Enabled | Name | Reports | | |
|---|---|---|---|---|---|
| Standard | 🔒 | First aid | | Edit | Log |
| Standard | 🔒 | Project management | | Edit | Log |
| Standard | 🔒 | General inspection | | Edit | Log |
| Standard | 🔒 | Water inspection | | Edit | Log |
| Standard | 🔒 | Fire inspection | | Edit | Log |
| Standard | 🔒 | Nature event inspection | | Edit | Log |

In the window that opens, you fill out a name for the task. Then you select if the task is an inspection task, or whether it's a task which requires a budget or not. Further you can choose which report, or reports, should be used for the task. When you are ready, click 'Add' to add the task.

**Tasks » Add new custom task**

| Name: | Own inspection task |
| --- | --- |
| Task type: | ○ No budget |
| | ○ With work items |
| | ● Inspection  ❓ |
| System report: | |
| Additional reports: | Egen rapportmal |

**Add**  **Cancel**

**Select default report**

| Search | Type here... |
| --- | --- |

| Title | File name | Description |
| --- | --- | --- |
| Own report template | Own_report_template.docx | This is a template to be used for inspections |

# Other Features in Contractor Pro

in4mo Contractor Pro comes with a range of other additional features. The features listed in this section have their own, separate user guides where you will find more detailed information, but they are included here as well to help make you aware of the features, as well as to help you locate these guides.

## Make Own Report Templates with Report Builder

Contractor Pro includes an own tool which lets you create your own report templates, called Report Builder. These report templates can then be set to be used in cases, either as an optional template that can be downloaded from the web portal, or they can be tied to specific tasks, and made available to be filled out from the Task Reporter app or through web reporting. We are working on an own user guide that explains how this tool works, as well as how you take these templates into use for different tasks.

## Customer Page

It is possible to grant your customers access to cases, where they can view reports, communicate with you, see the project plan in the case etc. You can customise how this page looks, what should be included on the page, and when and how access to the customer page should be granted. We have an own user guide explaining how to set up the customer page and what kind of opportunities exist in the function.

## Price Categories

If iCC is activated in the portal, Contractor Pro customers can use iCC in own cases. Cost calculations in own cases are calculated using defined price sets, known as price categories. It is possible to have different price categories with different prices, and to select which price category should be used in each case.

We are currently working on an own user guide which will explain how the feature works in greater detail.