First Allegiance and the AMI System

- AMI stands for Asset Management Interface and that is exactly what it does. It connects our field representatives to our staff in real time, whether in the field or in the office. On AMI, you can upload photos or fill out Property Condition reports as you complete your Asset visit. It is our most useful tool for accurate and timely updates to our clients.

If you need assistance with our AMI system or would like to schedule a webinar where we can show you live on the computer how to use the system, please call Nora Hartington at 888-727-6303.

Job Management

To access Job Management when logging in, click the tab labelled Job Management at the top taskbar (left side)

- On the **Job Management** screen, you'll be able to view all of your open job orders. You'll also be able to filter your search options by **Job Status, Job Type, Photo** (With/or Without) or **Service Due Date**

- When searching a singular asset, try to use only 1 of the 3 search fields: **Job #, Property** (Address), or **Loan No.** Adding too much information may restrict the search.

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- Here is where you will send **Quick Communications**, Create **Bids**, Upload **Photos**, Create **Updates**, Upload/Create **Documents** and Create **Invoices**.

Quick Communications

Quick Communications are messages tracked by AMI. They show when a communication was created, sent and read. You navigate out of this screen at any time by selecting a function from the **Additional Items for this Job** section.

- Add **Quick Communications** to your job by selecting your recipient. This will be the job representative for the job in question by default. However, you also have access to send communication under **Select Team** for **Contractor Accounting, Contractor Insurance, Orders** and **Photos.**

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- Type your message in the description and click **Post** to send. Your message will then populate to your **Quick Communication List**.

Bids

On the Bid screen, you can estimates for the services not within our allowable pricing. You can select the service for your bid at the top under **Services** or you can select one from the **Service** drop down.

- Specify under the **Utility Information** dropdown whether the **Water, Electric, Gas, Oil or Propane** is **On** or **Off**. If this is not relevant to the service. Please select **Not Applicable**
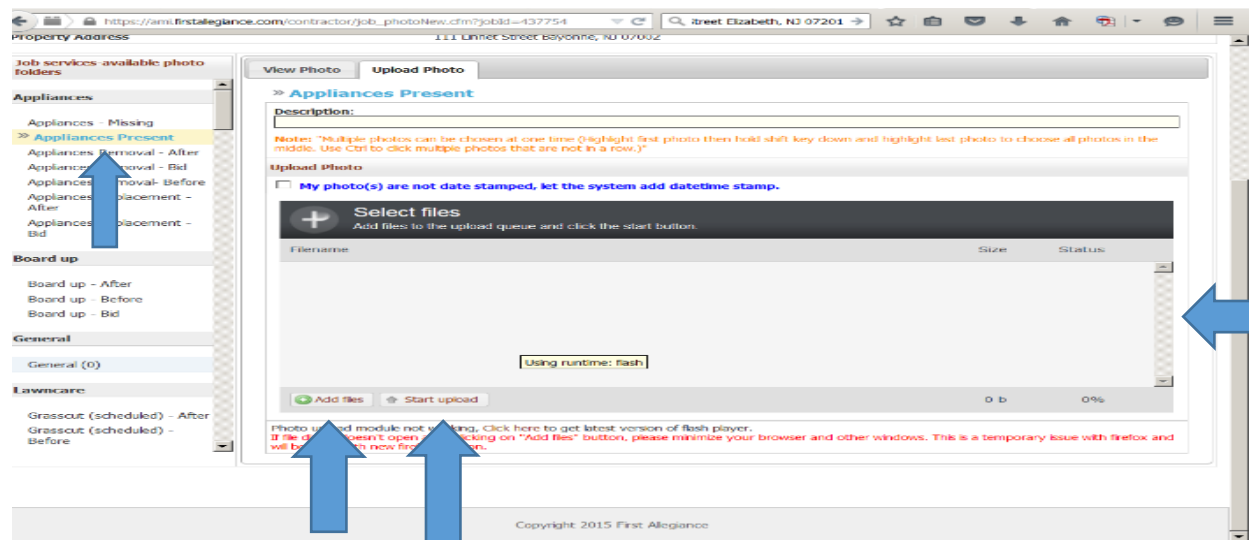
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- Specify whether this work was already completed on **Emergency Basis** or not. Simply click yes or no.

- Choose **Yes** or **No** to confirm that you have uploaded the correct photos for this Service bid.

Photos

You can upload photos easily with our photo module. On this module, select a **Photo group** on the left to start. This will initiate our Photo Upload Module as


seen below.

- Select **Add Files** to open your computer's browser and select photos inside the folder you would like to upload.

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- If your photos are not date stamped, you can click the checkbox next to **My photos(s) are not datestamped, let the system add datetime stamp**. After this is complete, select **Start Upload** to begin uploading photos.

- After the page loads, you will see the Photogroup highlighted on the left side on your screen under Job Services-Available Photos Folders. In parenthesis, you will notice your Photogroup is not finalized. Your recently uploaded photos will display on the right side. *Please see next page*.
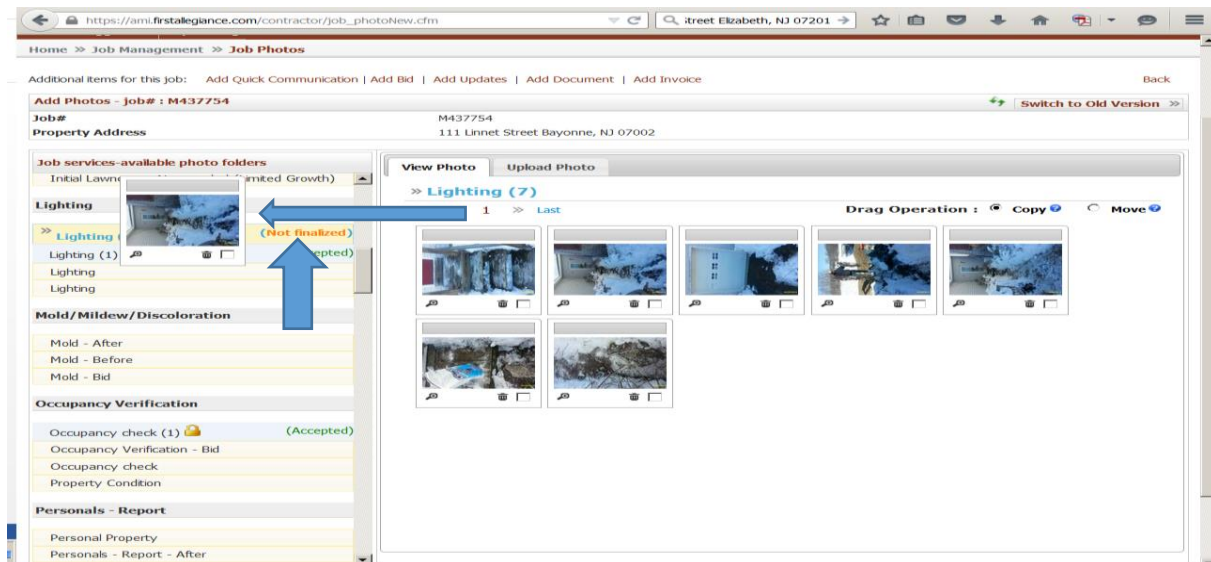
- **Photogroups** that are **Not Finalized** can be edited to add photos that were not uploaded on the first set. Simply drag the photos from right to left in to your **Not Finalized** photogroup or click the trash icon, to remove them.

- Once your **Photogroup** is edited to satisfaction, click **Not Finalized**, in order to finalize this group.

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Updates

Updates are short comments that advise our job representatives on the status of a service. You can update the service of your choice at the top of your **Service** screen. You can also add a service that was not on your job order by clicking Add New Service.

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- Select your **Update** from the bubbles under the Service Title (*Occupancy Check above*). Be sure to enter your **Completion Date** or **Estimated Completion Date**, and any notes that are relevant to this update.

- You can also attach photos to your update by dragging your Available photos from left to right.

Documents

You can upload or create documents on our website on the **Add Document** screen.

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- Select a form to create under **Create & Submit Forms**. The forms available are **Dump Report, Personal Property Release Signed, Property Condition Report, Winterization Checklist, and Lien Release Final Payment – Conditional Waiver and Release upon Final Payment**

- You can also submit any documents not available to be created digitally, under **Other documents**. Simply select **Browse** and select from your computer folder which document you'd like to upload. You will need to select a **Type** to **Add this document.**

Invoices

You can create an invoice on our **Add Invoice** module. You can also add your **Invoice #** to track along with your own bookkeeping database.

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- Select the **Service** you are invoicing for under the dropdown for **Service**. Once selected, you can select **Service Items** (subtitles) for your service.

- You will need to enter a **Description** if the service you are adding is not part of your **Job Order** service list.

- Be sure to add the **Quantity, Unit of Measure, Price per Units** and **Discount** (if applicable). Your Total Price for this Line Item will be calculated automatically.

  IMPORTANT *Please make sure that Before and After photos have been added before attempting to create an invoice!*

Please see next page.

- Your Total Invoice Amount will be calculated Automatically.

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- You can add any General Comments you'd like the Accounts Receivable department to see.

- You can choose to Save your invoice, which will save it for you to be worked on at a later time.

- You can choose Save and Submit, which will finalize your invoice and send to us to review.

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