



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)

Home » Job Management

Search

Job# OR Property OR Loan No.

(Provide full or partial job# to search.) (Enter property address e.g. street name, city, state, zip code etc.) (Provide full or partial loan# to search.)

Job Status: **Open + Completed - Conditional**

Job Type: Photo: Service Due: From: To:

View All Jobs Find Shortest Property Path

NOTE: A service update being marked as closed does not mean that the photos are complete.
*Conditional - pending review of photos and invoice

Job#	Loan#	Property Address	Job Type	Created Date	Due Date	Quick Communication	Bid(Create & Submit)	Photos	Updates(submit)	Documents	Invoice(Create & Submit)
1247643	1493	GOLDEN OAKS PARKWAY AURORA, IL 60006 Loan No : C100X65	Initial Inspections -	10/13/2010 09:52 AM	Due Date: 10/15/2010	(7)	(1)	(25)	(3)	(4)	(1)
R242174L	747 N 40TH STREET E SAINT LOUIS, IL 62205	Loan No : 15782477	Recurring Lawn -	08/24/2010 11:44 AM	Due Date: 10/13/2010	(3)	(0)	(5)	(0)	(3)	(1)
R227808L	747 N 40TH STREET E SAINT LOUIS, IL 62205	Loan No : 15782477	Recurring Lawn -	03/30/2010 02:45 AM	Due Date: 05/19/2010	(2)	(1)	(6)	(0)	(0)	(1)
M220401	304 sq ah, NY 12345	Loan No : 12121212	Maintenance -	12/15/2009 12:39 AM	Due Date: 12/16/2009	(4)	(5)	(4)	(0)	(11)	(1)
M177873	304 sq high Hushing, NY 11355	Loan No : 456456	Maintenance -	05/07/2009 04:53 AM	Due Date: 05/08/2009	(3)	(1)	(3)	(0)	(0)	(1)

- 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.

Additional items for this job: [Add Bid](#) | [Add Photo](#) | [Add Updates](#) | [Add Document](#) | [Add Invoice](#) Back

Add Quick Communication - job# : 1247643

Job# : 1247643
Property Address : 1493 GOLDEN OAKS PARKWAY AURORA, IL 60506
Lots# : Not set
Job Created Date : 10/13/2010 09:52:17 AM
Select Team * : - Select Team -
Kathy Bootari
Contractor Accounting
Contractor Insurance
Orders
Photos
Description :
[Post](#) [Reset](#)

Quick Communication List

Contractor Communication Loan # : C100X65, Property Address : 1493 GOLDEN OAKS PARKWAY AURORA, IL 60506 [ReturnID:1476443] Hello	CB: Isummation Contractor, LLC (C) 01/20/2015 08:34:48 AM
Contractor Communication Loan # : C100X65, Property Address : 1493 GOLDEN OAKS PARKWAY AURORA, IL 60506 [ReturnID:1224113] Test communication	CB: Isummation Contractor, LLC (C) 03/07/2014 05:40:49 AM
Contractor Communication Loan # : C100X65, Property Address : 1493 GOLDEN OAKS PARKWAY AURORA, IL 60506 [ReturnID:1224114] reply for test communication. Pritesh Patel, Web Support, First Allegiance Phone: 888.727.6303 x 8759, Fax: 201.823.2636	CB: Pritesh Patel (E) 03/07/2014 05:44:20 AM MB: Isummation Contractor, LLC (C) 01/20/2015 08:34:18 AM
TEST: Thanks for reply on this. This should now go to communication through mail system..	CB: Naren Patel (M) 03/07/2014 06:21:50 AM

- 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 estimate 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.

Additional items for this job: Add Quick Communication | Add Photo | Add Updates | Add Document | Add Invoice

Services				
Occupancy Verification	Board up	Winterization	Personals - Report	Pool Securing
Pool Maintenance	Spa/Hot Tub	Lawncare	Trashout/Debris Removal	Vehicles
Appliances	Mold/Mildew/Discoloration	Safety & Health Issue/Code Violation/Emergency Repairs	Winterization CheckList	Property Condition Photos
Roof	Sump Pump	Property Damage Repairs	Shrub Trimming/Service	Systems
Wipe Down				

Add New Bid - Job# : M437754

Job# : M437754
 Property Address : 111 Linnet Street Bayonne, NJ 07002
 Lotsize : Not set

Service * : **Shrub Trimming/Service**

Bid Title Description :
 Amount* :
 Description* :

Utility Information * :
 Water* : Not Applicable
 Electric* : Not Applicable
 Gas* : Not Applicable
 Oil* : Not Applicable
 Propane* : Not Applicable

Emergency Service Bid work has already been completed on emergency basis or will be completed on emergency basis ☐ Yes ☒ No

Have you uploaded supporting photos? ☒ Yes ☐ No

Upload photos to support your bid or select from the available photos below; drag supporting photos to the bid photo column to the right.

Available Photo

- 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**

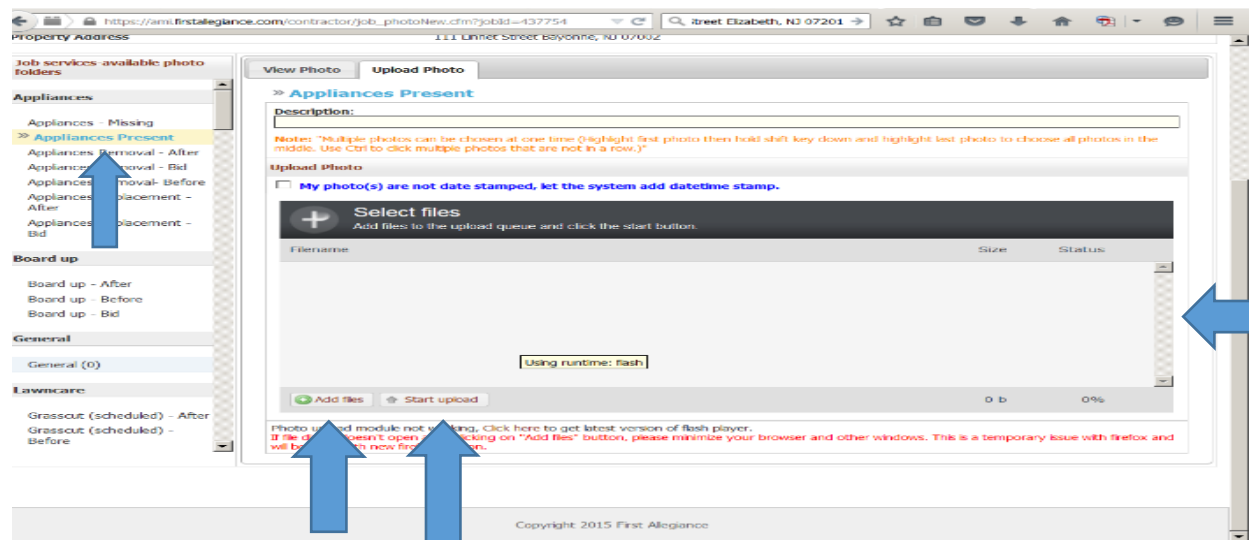
If you need assistance with our AMI system or would like to schedule a webinar where we can show you live on the computer how to use the system, please call Nora Hartington at 888-727-6303.



- 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



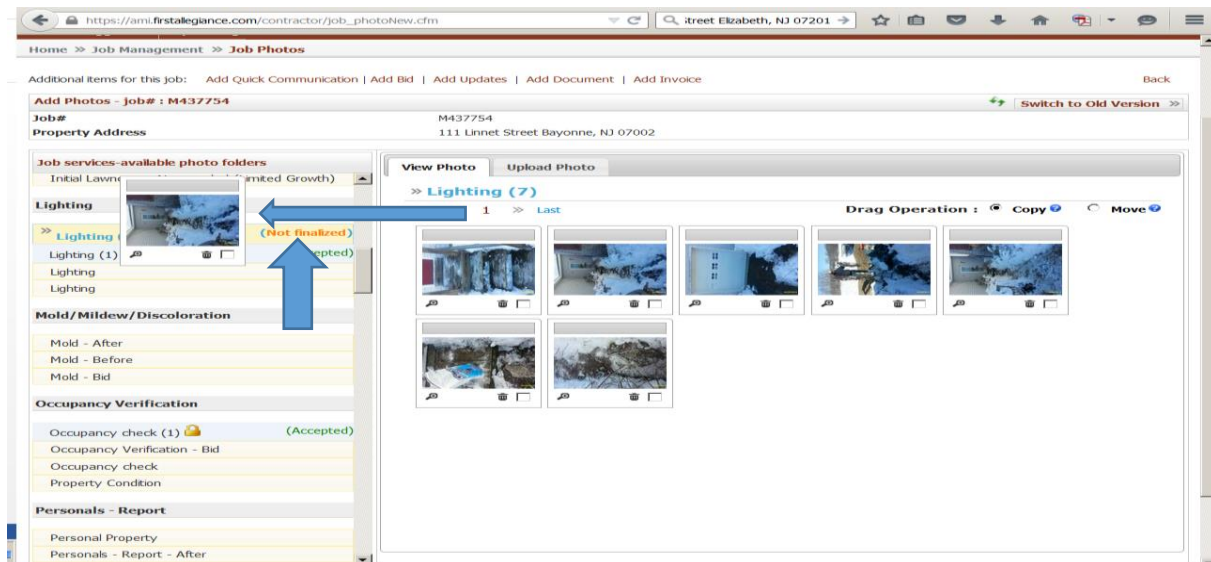
seen below.

- 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 date stamped, 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.

The screenshot shows the First Allegiance AMI system interface. The browser address bar displays <https://ami.firstallegiance.com/contractor/completionreport.cfm> and the search bar shows "treet Elizabeth, NJ 07201".

The **Services** section includes a table with columns: **Recent Update**, **Previous Update**, and **Not Submitted**. The table lists various services such as **Occupancy Verification**, **Pool Maintenance**, **Appliances**, **Roof**, **Wipe Down**, **Add New Service**, **Board up**, **Spa/Hot Tub**, **Mold/Mildew/Discoloration**, **Sump Pump**, **Winterization**, **Lawncare**, **Safety & Health Issue/Code Violation/Emergency Repairs**, **Property Damage Repairs**, **Personals - Report**, **Trashout/Debris Removal**, **Winterization Checklist**, **Shrub Trimming/Service**, **Pool Securing**, **Vehicles**, **Property Condition Photos**, and **Systems**.

The **Occupancy Check** section includes a form with the following options:

- ☐ Completed Date service was completed [Date field]
- ☐ Not Yet Completed Estimated Completion Date [Date field]
- ☐ Not Completed
- ☐ Not Applicable
- ☐ Not Needed at this time

Below the occupancy check options is a text area labeled **Notes Regarding Occupancy Check**.

The **Available Photo** section includes a heading: **Upload photos to support completion or select from the available photos below; drag supporting photos to the required folders to the right.** Below this heading is a grid of photo thumbnails. A blue arrow points to the "Add all photos from this group | Check All | Uncheck All" link.

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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.

Home » Job Management » Add Document

Additional items for this job: [Add Quick Communication](#) | [Add Bid](#) | [Add Photo](#) | [Add Updates](#) | [Add Invoice](#) Back

Information
Job# M437754
Property Address 111 Linnet Street Bayonne, NJ 07002
Lotsize Not set
My Reported Property Type SFR [Change](#)

Create & Submit Forms
Dump Report*
Personal Property Release Signed
Property Condition Report
Winterization Checklist
Lien Release Final Payment - CONDITIONAL WAIVER AND RELEASE UPON FINAL PAYMENT

Other Document
Type*
Upload Document* No file selected.
■ (NOTE: Do not upload updates, completion report, bid or invoice in this section.)
■ Note: Do not use this for winterization checklists or inspection forms. Winterization checklists and inspection forms must be created and submitted by clicking on the appropriate link in the "Create and Submit Forms" section on the top.

Type	Caption	Document	Submitted On	Status/By
Dump Report	N/A	PDF	06/23/2015 05:11:09 PM	Rejected Marcie Zielinski 06/24/2015 09:22:14 AM

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(NOTE: Any document uploaded onto this system becomes the property of First Allegiance and First Allegiance may use it in any manner.)

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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.

Additional Items for this job: Add Quick Communication | Add Bid | Add Photo | Add Updates | Add Document

Add Invoice - Job# : M437754

Job# M437754
 Property Address 111 Linnet Street Bayonne, NJ 07002
 Lotsize: Not set
 Invoice #

Click to download Invoice Submission Instructions
 call 888-727-6303 for assistance

Service	Service Item	Description (optional)	Quantity	Unit Of Measure	Price per Unit	Discount(%)	Total Price for this Line Item
-- select --	-- Select --		1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Address Posting			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Administrative / Communication			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Agent/Contractor Repair Inspection Meeting			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Air Conditioning System			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Air Fresheners			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Animals			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Appliances			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Appraisal			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Assess P&P Services Needed/Provide Bids			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Assess Services Needed For Conveyance/Provide Bids			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Auction			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Bid - Provide Bids as Needed			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Bids - Minor Repairs/Make Home Liveable			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Bids - Reconveyance			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Board up			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
BPO - Exterior			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
BPO - Interior			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Cap Water/Sewer/Gas Line			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Cap Wires			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Completion Date:			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
-- select --	-- Select --		1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
<input type="checkbox"/> Per Approved Bid	<input type="checkbox"/> Additional Item :		1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
<input type="checkbox"/> Select Approved Bid			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
Completion Date*:			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
-- select --	-- Select --		1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
<input type="checkbox"/> Per Approved Bid	<input type="checkbox"/> Additional Item :		1	--- Select Unit ---	\$ 0.00	0	\$ 0.00
<input type="checkbox"/> Select Approved Bid			1	--- Select Unit ---	\$ 0.00	0	\$ 0.00

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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.

https://ami.firstallegiance.com/contractor/job_invoice.cfm

street Elizabeth, NJ 07201

☐ Per Approved Bid
-- Select Approved Bid --
Completion Date*:

-- select -- -- Select -- 1 --- Select Unit --- \$ 0.00 0 \$ 0

☐ Per Approved Bid
-- Select Approved Bid --
Completion Date*:

-- select -- -- Select -- 1 --- Select Unit --- \$ 0.00 0 \$ 0

☐ Per Approved Bid
-- Select Approved Bid --
Completion Date*:

-- select -- -- Select -- 1 --- Select Unit --- \$ 0.00 0 \$ 0

☐ Per Approved Bid
-- Select Approved Bid --
Completion Date*:

-- select -- -- Select -- 1 --- Select Unit --- \$ 0.00 0 \$ 0

Total Invoice Amount \$ 0

Discount(%) (%) \$ 0

General Comment

Saved Invoice/s

Invoice #	Total Amount	Submitted On	General Comment	Action
No Record Found				

Saved & Submitted Invoice/s

Invoice #	Total Amount	Submitted On	General Comment	Action
75Splat	\$2,800.00	06/23/2015 05:16:18 PM		<input type="button" value="View"/> <input type="button" value="Print"/> <input type="button" value="Communication"/>

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- 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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