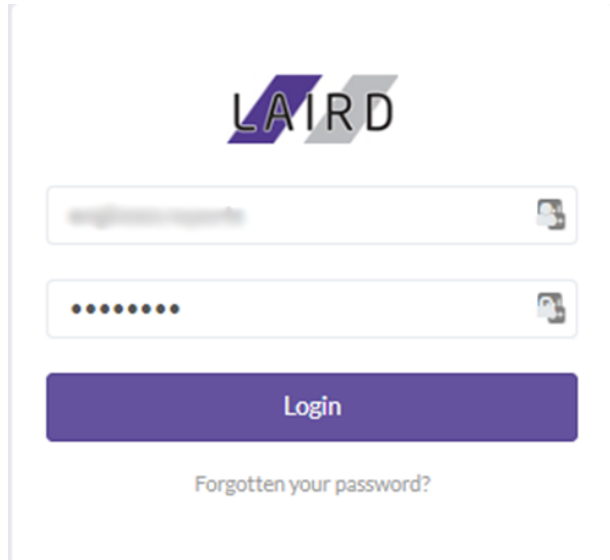


Laird Assessors Swiftcase Guide

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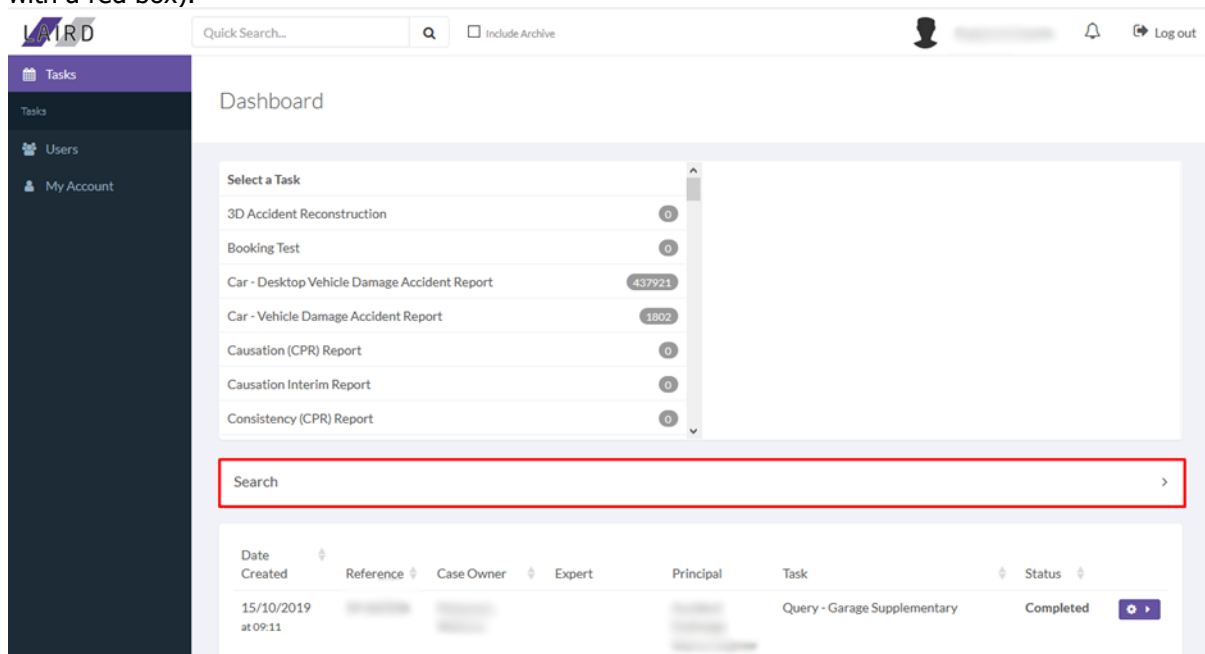
Login Page

When you first connect to Swiftcase, located at www.lairdassessors.swiftcase.co.uk, you'll be greeted with the adjacent login screen, where you can enter your username and password as provided.

If you've forgotten your password you can quickly reset it by clicking on "Forgotten your password?" beneath the login button. This will send an email to the email address used to setup the account which will contain a link; if you follow this link you'll be able to reset your password.

Searching for a Reference

After logging in you'll be greeted with the below screen. If you're looking for a specific reference you can use the list at the bottom of the screen, but a quicker way is to use the main search (highlighted with a red box).

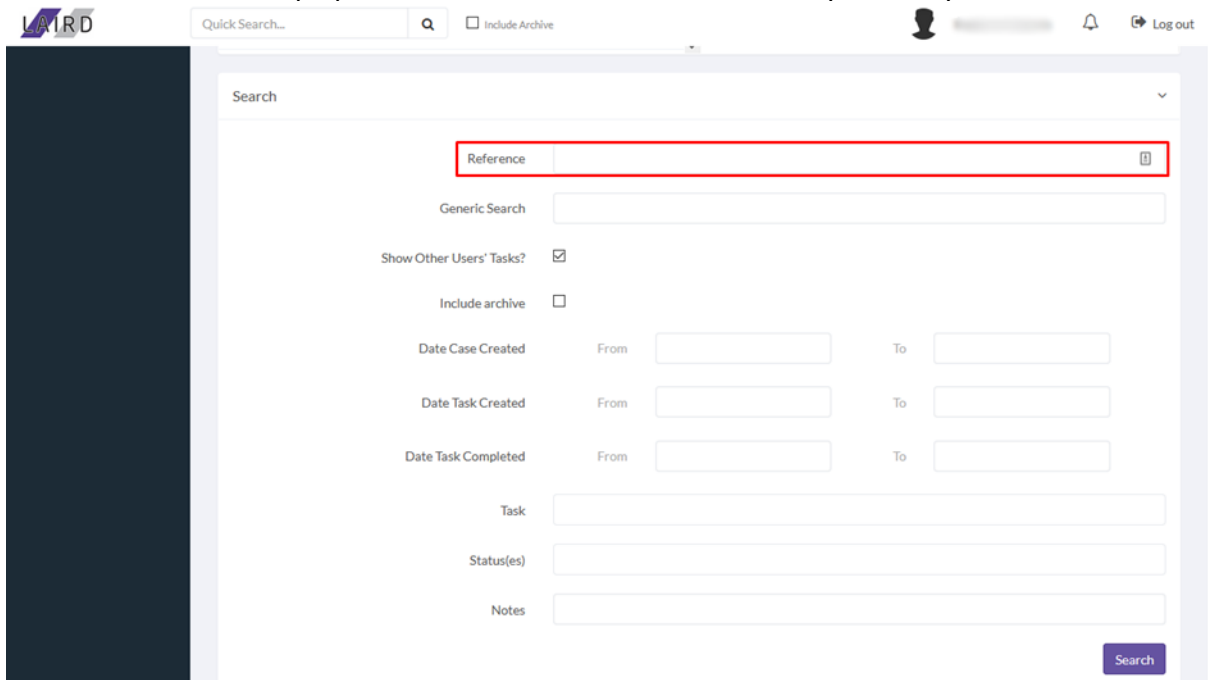


Date Created	Reference	Case Owner	Expert	Principal	Task	Status
15/10/2019 at 09:11					Query - Garage Supplementary	Completed

Once you've clicked "Search" a number of fields will drop down as shown below. You can use these fields to filter the search results by reference, registration, date created, date completed, notes or

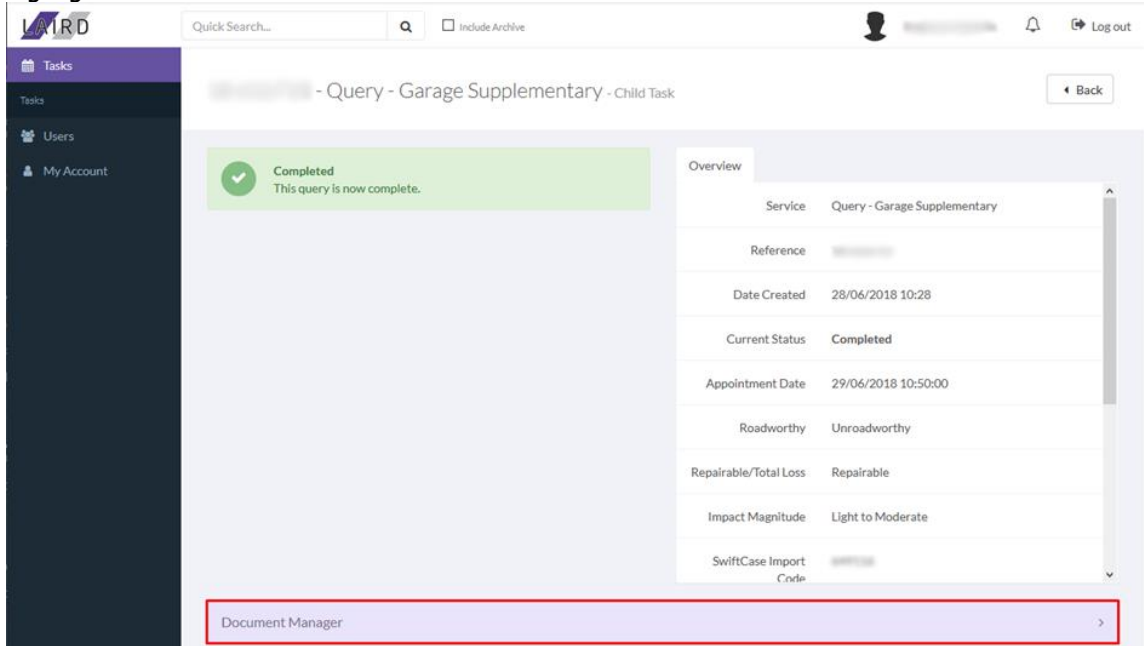


status. The quickest way to find your case is to search by reference in the highlighted field – just fill in the field and click the purple “Search” button then scroll down and you’ll see your results.



Viewing and Downloading Files

Viewing and downloading your files is a simple task, all you’ll need to do is use the search function to navigate to your case and then scroll down and click on the “Document Manager” dropdown which is highlighted below.





Once you've clicked this, you'll see a list of files drop down – if you hover over any of them, or click on the cog icon, you'll see an option to view and an option to download the file.


Document Manager

Drag and drop into the box below or click Choose File to upload your files. Maximum file upload size is 100MB.

Choose File...

Drag and Drop your files here

Thumbnail View

Name	Description	Type	Size
 -Supp-Images.pdf		PDF	299,303 bytes

View Download

I Can't Find My Task in The Search

If you're using the search function but still unable to find your task, there is an alternate method you can use to locate your task. When on any page, look to the top right and click on your username

LAIRD Quick Search... Include Archive

Dashboard

Select a Task

- 3D Accident Reconstruction
- Booking Test
- Car - Desktop Vehicle Damage Accident Report (498762)
- Car - Vehicle Damage Accident Report (2032)
- Causation (CPR) Report
- Causation Interim Report
- Consistency (CPR) Report

Search

Date Created	Reference	Case Owner	Expert	Principal	Task	Status
15/10/2019 at 09:11					Query - Garage Supplementary	Completed
18/10/2019					Query - URGENT Principal Request	Completed



Then click on the "Task List" dropdown to display a list of all your tasks. From here you can see all tasks under your account as well as a number of details: date created, reference, our case owner, expert, type of task, and current status. You can also click on the reference or the cog to the right to view the task.

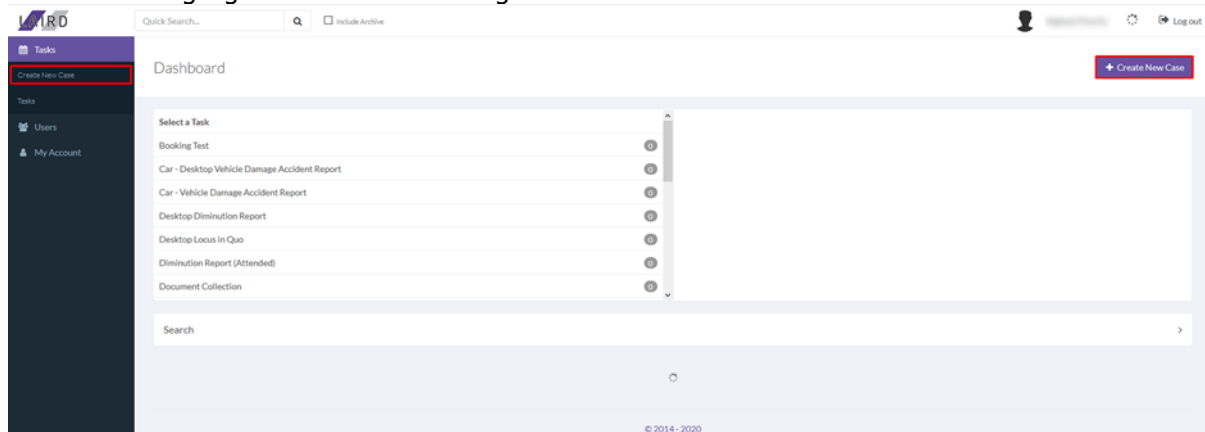
The screenshot shows the LAIRD user profile page. The left sidebar contains navigation options: Tasks, Users, My Account (highlighted), My Profile, Notifications, and Logout. The main content area includes a profile picture, an 'About' section with fields for First Name, Surname, Username, and Registered Since (06/08/2015 14:44), and an 'Edit Profile' button. To the right is an 'Account Settings' section with buttons for Edit Profile, Edit Photo, Select Default Email Address, Change Password, and Enable 2-Factor Auth. Below these are sections for Contact, User Tasks, Configured Tasks, Announcements, Addresses, Document Manager, and Task List (highlighted with a red border).

The screenshot shows the 'Task List' page. The table contains the following data:

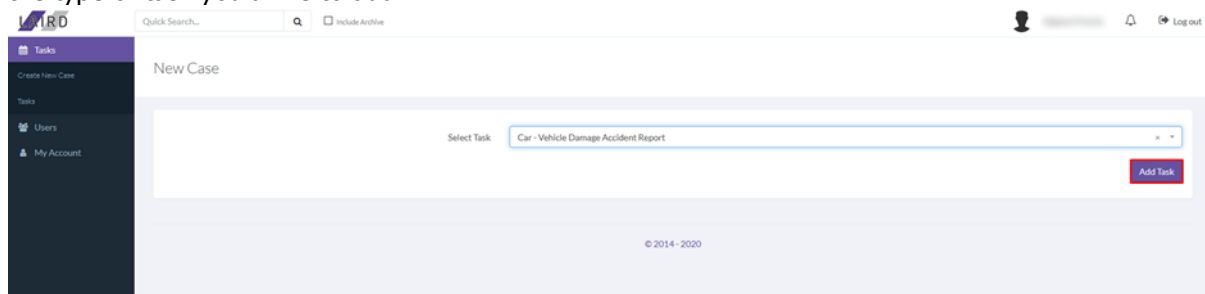
Date Created	Reference	Case Owner	Expert	Principal	Task	Status
30/10/2019 #1208					Car - Vehicle Damage Accident Report	Completed
06/11/2019 #0944					Car - Vehicle Damage Accident Report	Completed
15/10/2019 #0911					Query - Garage Supplementary	Completed
19/10/2019 #1555					Query - Garage Supplementary	Completed
17/10/2019 #1539					Query - Garage Supplementary	Completed
14/10/2019 #1527					Query - Garage Supplementary	Completed
18/10/2019 #1535					Query - URGENT Principal Request	Completed
04/11/2019 #1511					Car - Vehicle Damage Accident Report	Completed

Creating a Case

Creating a case can be done very easily through Swiftcase. First, you'll need to be on the homepage and click "Create New Case" – either on the left in the menu or on the right in the purple button, both of which are highlighted in the below image:



After clicking on either of these buttons you'll be taken to the New Task page where you can select the type of task you'd like to add.



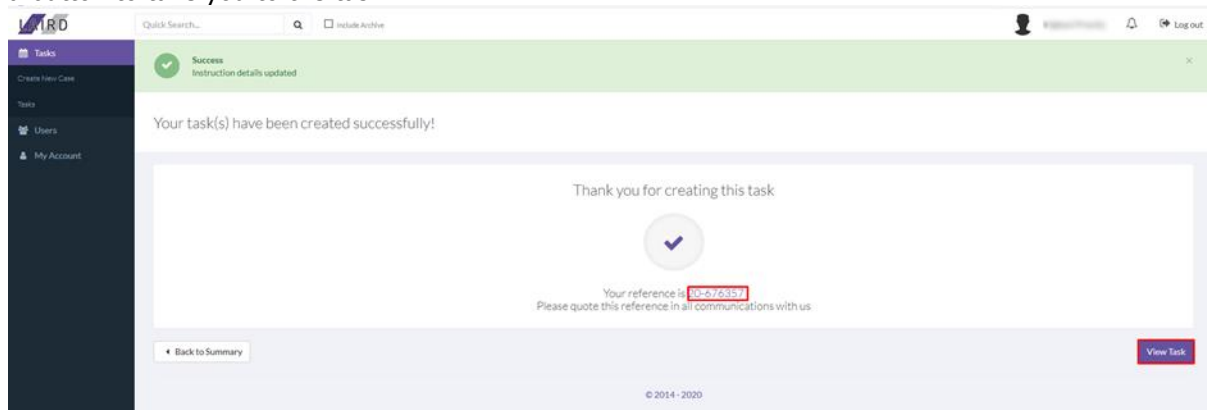
Vehicle Damage Accident Report

Select "Car – Vehicle Damage Accident Report" in the dropdown and hit "Add Task" - a series of fields will appear for you to fill out. For a VDAR, you'll need to fill out the registration, then click on Lookup Existing Tasks, then click on Lookup Vehicle Details. This will fill in the details about the vehicle, but ensure you've filled in the below fields as well. You'll need to press the "Next" button to see the rest of the fields included in this list.

- Make
- Model
- Inspection Contact Name
- Inspection Address
- Inspection Contact Phone Number
- Principal Reference
- Accident date
- Client Type
- Client Salutation
- Client First Name
- Client Second Name

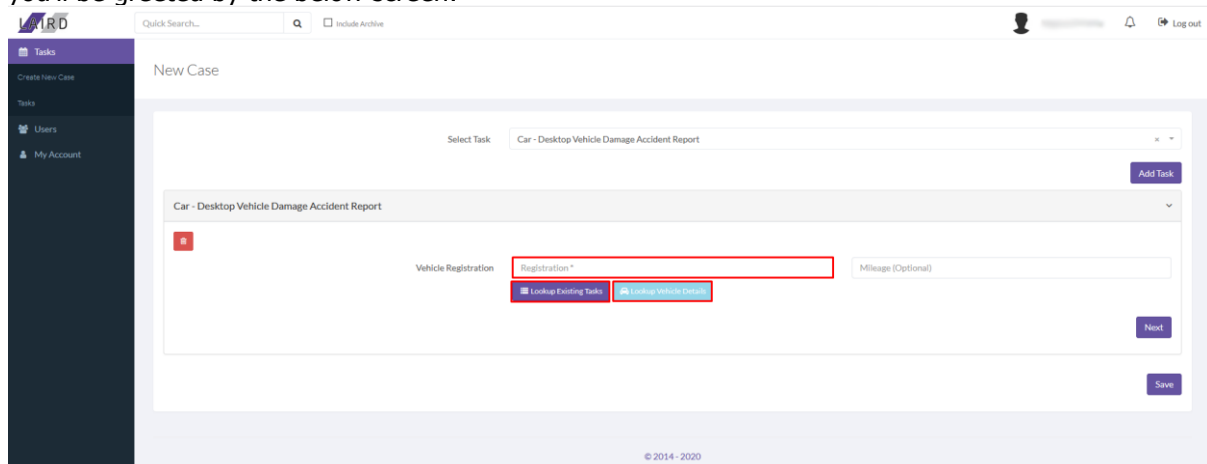
- Client Address
- Client Email Address

Once you've filled in the above information, hit "Next" one more time and pick from the "On Site/In Use" dropdown. After you've done that, just hit the save button on the right and you'll be taken to the next page. You'll then be greeted with the below screen which displays our reference, along with a button to take you to the task:



Desktop Vehicle Damage Accident Report

Select "Car – Desktop Vehicle damage Accident Report" in the dropdown and click "Add Task" and you'll be greeted by the below screen:

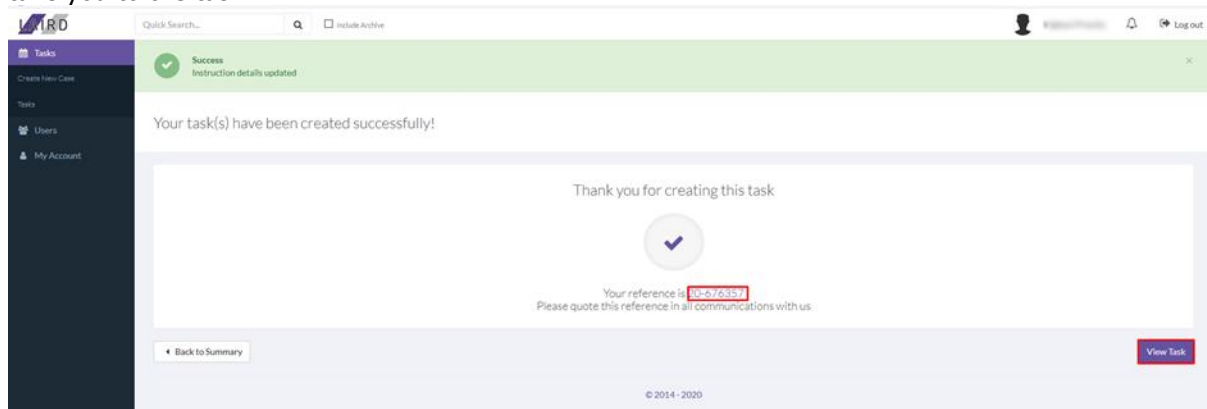


Fill in the vehicle registration and then click "Lookup Existing Tasks" followed by "Lookup Vehicle Details". This may take a minute to load, but once it's done, you'll see a series of fields appear containing details about the vehicle. Once that's loaded just scroll down and click "Next" and you'll see another set of fields in which you'll need to answer the below questions:

- Make
- Model
- Inspection Contact Name
- Inspection Address
- Inspection Contact Phone Number

- Principal Reference
- Accident date
- Client Type
- Client Salutation
- Client First Name
- Client Second Name
- Client Address
- Client Email Address

Once you've filled in all this information, press "Next" once more and pick from the "On Site/In Use" dropdown. Then click "Next" again and fill in the Booking Date, then press "Save" when you're done. You'll then be greeted with the below screen which displays our reference, along with a button to take you to the task:



The screenshot shows the LAIRD web application interface. At the top, there is a navigation bar with the LAIRD logo, a search bar, and a user profile icon. A green success banner at the top reads "Success: Instruction details updated". Below this, a message states "Your task(s) have been created successfully!". The main content area features a large white box with the text "Thank you for creating this task" and a circular icon containing a checkmark. Below the icon, it says "Your reference is: 10-07-0557" (the reference number is highlighted in red) and "Please quote this reference in all communications with us". At the bottom of the main content area, there are two buttons: "Back to Summary" and "View Task". The footer of the page displays the copyright notice "© 2014 - 2020".