

Additional Job Contacts

Source of Referral, Agent, Adjuster, etc.

To add additional contacts to an existing job, navigate to the job using your preferred search method; within the Job Detail page click on the **Additional Contacts** tab.

Job Name: Jameis **Job #:** 19-102RCON **Job Progress:** Inspection Scheduled **Loss Type:** Reconstruction



Jameis Winston (904) 333-5577 - Cell
3698 Beach Blvd, Jax Beach, FL 32250

Tasks: 4 **Incomplete:** 1 **Due Today:** 0 **Overdue:** 1 **Future:** 0

Documents: 3

Correspondence: 5

WOs: 0 **Open:** 0 **Due Today:** 0 **Overdue:** 0 **Review:** 0 **Repair:** 0

Equipment: **Out:** 0 **Returned:** Total: 0

Job Snapshot

Detail
Job Contacts (1)
Additional Contacts (1)
Losses (1)
Schedules (1)
Tasks (4)
Subs/Techs
Financials**
Correspondence (5)

Documents & Pics (3)
Document Merge
Inspections
Moisture Readings
Equipment
Change Log

Within the Additional Contacts tab select Reported By and/or Referred By (if applicable) from the drop-down; once the information is applied click the **Save**.

Additional Contacts:

Reported By: Customer

Referred By: Insurance Company

Contact Type	Name	Company
No records to display.		

+

To add an additional contact to the Job such as the Source of Referral, Adjuster, Agent, Property Manager, etc. click on **Additional Contacts** tab and select the **New Additional Contact** icon.

Detail
Job Contacts (1)
Additional Contacts (1)


Documents & Pics (3)
Document Merge
Inspecti

Additional Contacts:

Reported By: Customer

Referred By: Insurance Company

Contact Type	Name
No records to display.	

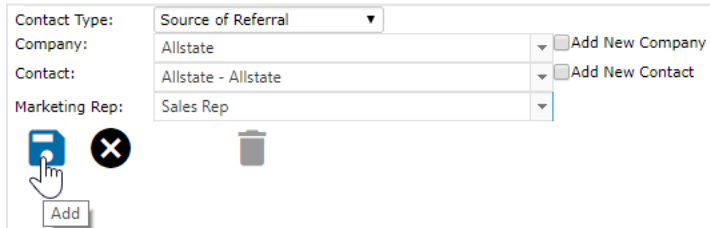

New Additional Contact

Additional Job Contacts

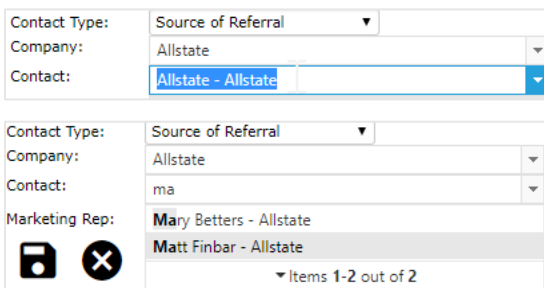
Source of Referral, Agent, Adjuster, etc.

To add an additional job contact

1. Select the **Contact Type** from the drop-down.
2. Select the **Company** the contact is associated with.
3. Once the Company is selected by default the Primary Contact will be applied into the **Contact** field.
4. Click **Add**

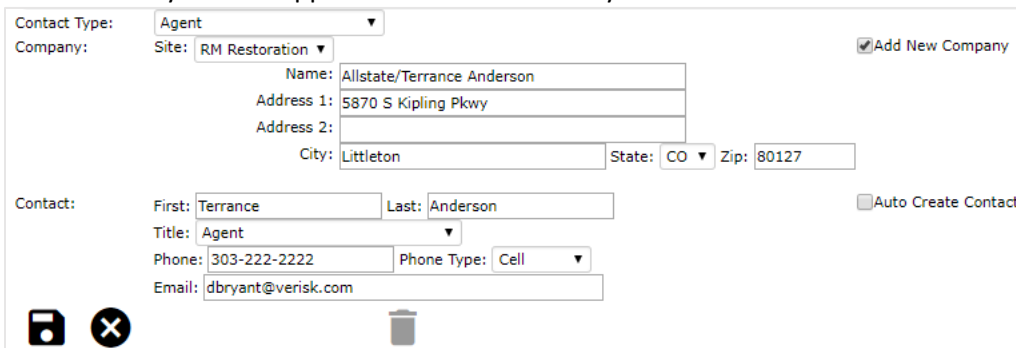


To add a different contact, highlight the Contact field and begin to type any portion of the contact name you are looking for; then select the contact and click Add.



If the Company your looking for doesn't display a new Company and Contact can be added by checking the **Add New Company** box.

1. Select the **Site** from the drop-down, if there is more than one Site select the Site that the new Company and Company Contact will be available within.
2. Add the **Company Name**.
3. Add the **Address 1, Address 2, City, State and Zip** if you know it.
4. Add the **Contact First** and/or **Last** name or check the **Auto Create Contact** box; by checking this box the contact will be the same as the Company Name.
5. Select the contacts **Title** from the drop-down.
6. Add the contacts **Phone Number** and **Phone Type** from the drop-down.
7. Add the contacts **Email** address.
8. After you have applied all the information you have click **Add**.





Additional Job Contacts

Source of Referral, Agent, Adjuster, etc.

If the contact your looking for doesn't display to select you can add a New Contact by checking the **Add New Contact** box.

1. Add the **Contact First** and/or **Last** name.
2. Select the contacts **Title** from the drop-down.
3. Add the contacts **Phone Number** and **Phone Type** from the drop-down.
4. Add the contacts **Email** address.
5. After you have applied all the informaiton you have click **Add**.

Contact Type: Adjuster

Company: Allstate Add New Company


Contact: First: Keigan Last: Nicholson Add New Contact

Title: Adjuster

Phone: 303-111-1111 Phone Type: Cell

Email: dbryant@verisk.com

How the Additional Job Contacts are displayed once they have been added.

Job Name: Jameis	Job #: 19-102RCON	Job Progress Inspection Scheduled	Loss Type: Reconstruction										
 Jameis Winston (904) 333-5577 - Cell 3698 Beach Blvd, Jax Beach, FL 32250													
Tasks: 4 Incomplete: 1 Due Today: 0 Overdue: 1 Future: 0 Documents: 3 Correspondence: 5 WOs: 0 Open: 0 Due Today: 0 Overdue: 0 Review: 0 Repair: 0 Equipment: Out: 0 Returned: Total: 0		<table border="1"> <tr><td>Reported By</td><td>Customer</td></tr> <tr><td>Referred By</td><td>Insurance Company</td></tr> <tr><td>Adjuster</td><td>Keigan Nicholson (Allstate)</td></tr> <tr><td>Agent</td><td>Terrance Anderson (Allstate/Terrance Anderson)</td></tr> <tr><td>Source of Referral</td><td>Allstate (Allstate)</td></tr> </table>		Reported By	Customer	Referred By	Insurance Company	Adjuster	Keigan Nicholson (Allstate)	Agent	Terrance Anderson (Allstate/Terrance Anderson)	Source of Referral	Allstate (Allstate)
Reported By	Customer												
Referred By	Insurance Company												
Adjuster	Keigan Nicholson (Allstate)												
Agent	Terrance Anderson (Allstate/Terrance Anderson)												
Source of Referral	Allstate (Allstate)												

The primary phone number associated with the additional contact displays when you hover over the contact name.

Reported By Cl 303-111-1111 - Cell
Referred By Insurance Company
Adjuster Keigan Nicholson (Allstate)
Agent Terrance Anderson (Allstate/Terrance Anderson)
Source of Referral Allstate (Allstate)