

Job Not Sold

To update a job to Job Not Sold, search the job using your preferred search method. Within the Job Detail page single click on **Job Snapshot** to expand.

Job Name: Storm - Roof Damage **Job #:** 19-104ROOF **Job Progress:** Customer Contacted **Loss Type:** Roof



Mary Ann Jones, Owner 904-888-5511 - Cell dawn@servicesoftwareinc.com
Danielle Smith, Family Member 904-226-5555 - Home 12:00-8:00pm ONLY
 369 3rd Street, Jax Beach, FL 32250



Tasks: 2 Incomplete: 0 Due Today: 0 Overdue: 0 Future: 0 +

Documents: 2

Correspondence: 5 +

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

Equipment: Out: 0 Returned: Total: 0

Referred By Agent
Adjuster Jason Matthews (MetLife)
Agent Renae Bradley (Dawn's Rockin' Agency)
Source of Referral Renae Bradley (Dawn's Rockin' Agency)
TPA Alacrity - Complex (Alacrity)
Mortgage Company AmeriSave Mortgage Corp (AmeriSave Mortgage Corporation)

Job Snapshot

Estimator and Sales

Losses: 1189

Date of Loss: 01/23/2019 2:00 AM

Date Received: 01/23/2019 9:48 AM

Customer Contacted: 01/23/2019 9:48 AM

Site Inspection Appt: 01/23/2019 1:00 PM

End: 01/23/2019 2:30 PM

By: Dawn Bryant

Site Inspected: 01/23/2019 1:00 PM

Estimate Uploaded: []

Estimate Approved: []

WA/Contract Signed: []

Production and Accounting

Loss Type: Roof

Target Start Date: []

Target Completion: []

Job Started: []

End: []

Drying Started: []

Drying Completed: []

Job Completed: []

Date Closed: 02/05/2019

Job Not Sold: 02/05/2019

Send Job to Xactimate

XA TRANS ID#: []

Progress: Job Not Sold

Determination: Denied Insured not pursuing the c

1. Within the Job Snapshot apply the **Job Not Sold Date**.
 2. Select the **Determination** from the drop-down.
- Note: The Administrator can add additional Determinations by going to Settings→ System Setup→ Settings→ WO Settings, WO Determinations.*
3. Click **Save**.

How to generate a Job Not Sold Report go to Reports→ Production→ Production

Criteria to remember...

Select the Job Status (Active, Inactive or Include All), Select how you would like the report to subtotal, Job Progress select Not Sold/Lost, Select the date range, Select the Report Sort, Report Output Options: Report or Data Export.