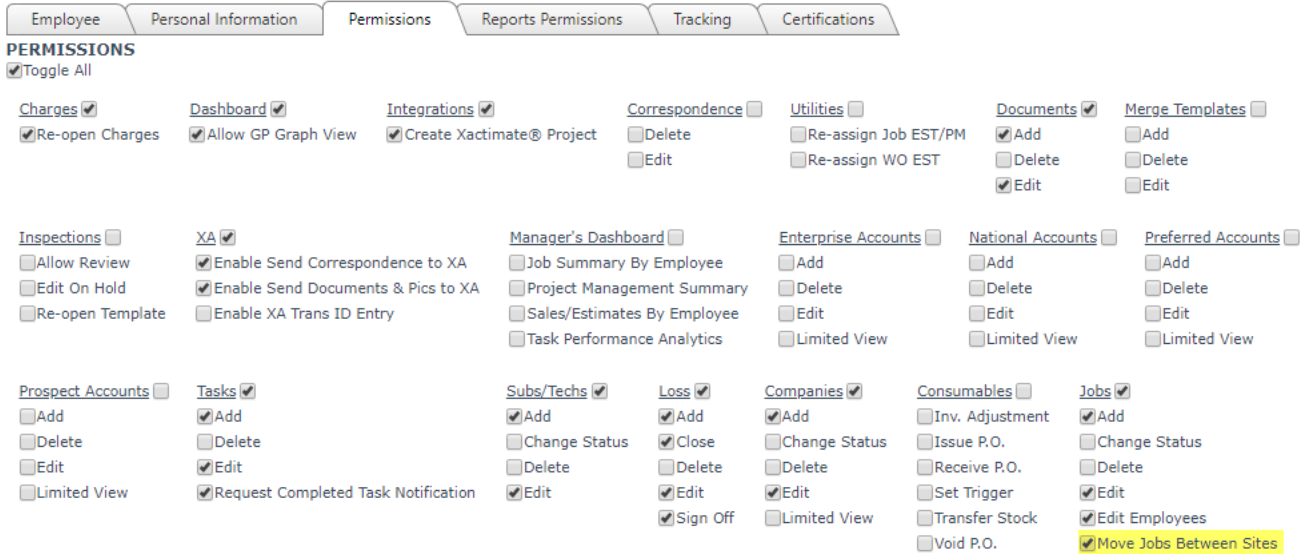


## Move Jobs Between Sites

The administrator of Restoration Manager will need to allow permissions before you can use this functionality. To apply the Move Jobs Between Sites permission, go to Settings→ System Setup→ Employees click on the Permissions tab and check the Move Jobs Between Sites permission.

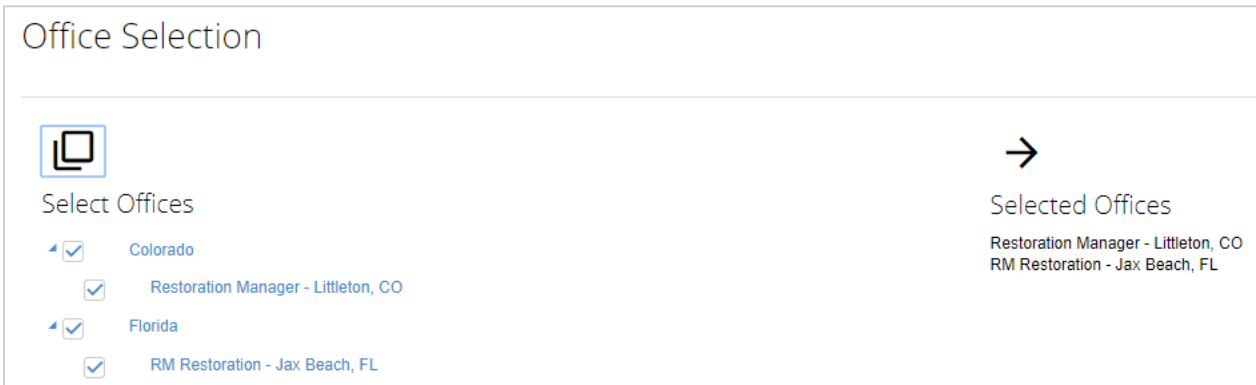


Employee | Personal Information | **Permissions** | Reports Permissions | Tracking | Certifications

**PERMISSIONS**  
 Toggle All

<b>Charges</b> <input checked="" type="checkbox"/>	<b>Dashboard</b> <input checked="" type="checkbox"/>	<b>Integrations</b> <input checked="" type="checkbox"/>	<b>Correspondence</b> <input type="checkbox"/>	<b>Utilities</b> <input type="checkbox"/>	<b>Documents</b> <input checked="" type="checkbox"/>	<b>Merge Templates</b> <input type="checkbox"/>
<input checked="" type="checkbox"/> Re-open Charges	<input checked="" type="checkbox"/> Allow GP Graph View	<input checked="" type="checkbox"/> Create Xactimate® Project	<input type="checkbox"/> Delete	<input type="checkbox"/> Re-assign Job EST/PM	<input checked="" type="checkbox"/> Add	<input type="checkbox"/> Add
			<input type="checkbox"/> Edit	<input type="checkbox"/> Re-assign WO EST	<input type="checkbox"/> Delete	<input type="checkbox"/> Delete
					<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Edit
<b>Inspections</b> <input type="checkbox"/>	<b>XA</b> <input checked="" type="checkbox"/>	<b>Manager's Dashboard</b> <input type="checkbox"/>	<b>Enterprise Accounts</b> <input type="checkbox"/>	<b>National Accounts</b> <input type="checkbox"/>	<b>Preferred Accounts</b> <input type="checkbox"/>	
<input type="checkbox"/> Allow Review	<input checked="" type="checkbox"/> Enable Send Correspondence to XA	<input type="checkbox"/> Job Summary By Employee	<input type="checkbox"/> Add	<input type="checkbox"/> Add	<input type="checkbox"/> Add	
<input type="checkbox"/> Edit On Hold	<input checked="" type="checkbox"/> Enable Send Documents & Pics to XA	<input type="checkbox"/> Project Management Summary	<input type="checkbox"/> Delete	<input type="checkbox"/> Delete	<input type="checkbox"/> Delete	<input type="checkbox"/> Delete
<input type="checkbox"/> Re-open Template	<input type="checkbox"/> Enable XA Trans ID Entry	<input type="checkbox"/> Sales/Estimates By Employee	<input type="checkbox"/> Edit	<input type="checkbox"/> Edit	<input type="checkbox"/> Edit	<input type="checkbox"/> Edit
		<input type="checkbox"/> Task Performance Analytics	<input type="checkbox"/> Limited View	<input type="checkbox"/> Limited View	<input type="checkbox"/> Limited View	<input type="checkbox"/> Limited View
<b>Prospect Accounts</b> <input type="checkbox"/>	<b>Tasks</b> <input checked="" type="checkbox"/>	<b>Subs/Techs</b> <input checked="" type="checkbox"/>	<b>Loss</b> <input checked="" type="checkbox"/>	<b>Companies</b> <input checked="" type="checkbox"/>	<b>Consumables</b> <input type="checkbox"/>	<b>Jobs</b> <input checked="" type="checkbox"/>
<input type="checkbox"/> Add	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Add	<input type="checkbox"/> Inv. Adjustment	<input checked="" type="checkbox"/> Add
<input type="checkbox"/> Delete	<input type="checkbox"/> Delete	<input type="checkbox"/> Change Status	<input checked="" type="checkbox"/> Close	<input type="checkbox"/> Change Status	<input type="checkbox"/> Issue P.O.	<input type="checkbox"/> Change Status
<input type="checkbox"/> Edit	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Delete	<input type="checkbox"/> Delete	<input type="checkbox"/> Delete	<input type="checkbox"/> Receive P.O.	<input type="checkbox"/> Delete
<input type="checkbox"/> Limited View	<input checked="" type="checkbox"/> Request Completed Task Notification	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Set Trigger	<input checked="" type="checkbox"/> Edit
			<input checked="" type="checkbox"/> Sign Off	<input type="checkbox"/> Limited View	<input type="checkbox"/> Transfer Stock	<input checked="" type="checkbox"/> Edit Employees
					<input type="checkbox"/> Void P.O.	<input checked="" type="checkbox"/> Move Jobs Between Sites

To move a job to another Site (Office, Location or Department), you will need to be logged into the site the job resides within and the site you will be moving the job to.



Office Selection

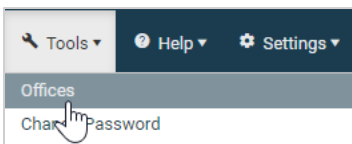
Select Offices

- Colorado
  - Restoration Manager - Littleton, CO
- Florida
  - RM Restoration - Jax Beach, FL

Selected Offices

- Restoration Manager - Littleton, CO
- RM Restoration - Jax Beach, FL

If you're already logged into RM and not working in multiple Sites (Office, Location or Department), you can quickly log into multiple Sites (Office, Location or Department) by going to Tools→Sites (Office, Location or Department).



Tools | Help | Settings

Offices


Change Password


## Move Jobs Between Sites


Search the job using your preferred search method; next click on the **Move to New Office** located at the bottom of the Job Detail page.

<b>Job Name:</b> Storm - Roof Damage	<b>Job #:</b> 19-104ROOF	<b>Job Progress:</b> Inspection Scheduled	<b>Loss Type:</b> Roof
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**Mary Ann Jones, Owner** 904-888-5511 - Cell [dawn@servicesoftwareinc.com](mailto:dawn@servicesoftwareinc.com)  
**Danielle Smith, Family Member** 904-226-5555 - Home 12:00-8:00pm ONLY  
 369 3rd Street, Jax Beach, FL 32250 



**Tasks:** 3 **Incomplete:** 0 **Due Today:** 0 **Overdue:** 0 **Future:** 0   
**Documents:** 3  
**Correspondence:** 8   
**WOs:** 1 **Open:** 1 **Due Today:** 0 **Overdue:** 1 **Review:** 0 **Repair:** 1  
**Equipment:** **Out:** 0 **Returned:** Total: 0

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

**Job Snapshot** 

Detail	Job Contacts (2)	Additional Contacts (5)	Losses (1)	Schedules (3)	Tasks (3)	Subs/Techs	Financials	Correspondence (8)
Documents & Pics (3)	Document Merge	Inspections	Moisture Readings (1)	Equipment	Change Log			

**General**

Company: Dawn's Rockin' Agency - DRA 

Company Contact:   Company Billing Contact:  

ID: 19-104ROOF  Red Flag  Billing and Collections Notes

Job Name: Storm - Roof Damage  Custom Job Name \*Default is Primary Job Contact Name

Claim #: 123458-MET

Address: 369 3rd Street Year Built: 2015

Building:   Area:  

City: Jax Beach State: FL Zip: 32250

County: County

**Employee**

Project Mgr: Dawn Bryant

Estimator: Dawn Bryant

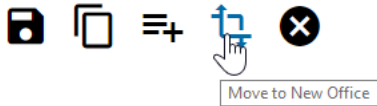
Lead Tech: Bobbie Oldham

Marketing Rep: Sales Rep

Call Taker: Call Taker

Accountant: Accounting (RM Restoration)

Email Sync: Training Email Sync




The page will redirect where you select which Office (Location, Department or Site) the job will be moved to. Once the selection is made the to proceed with moving the job click **Continue**.

### Move Job to New Office

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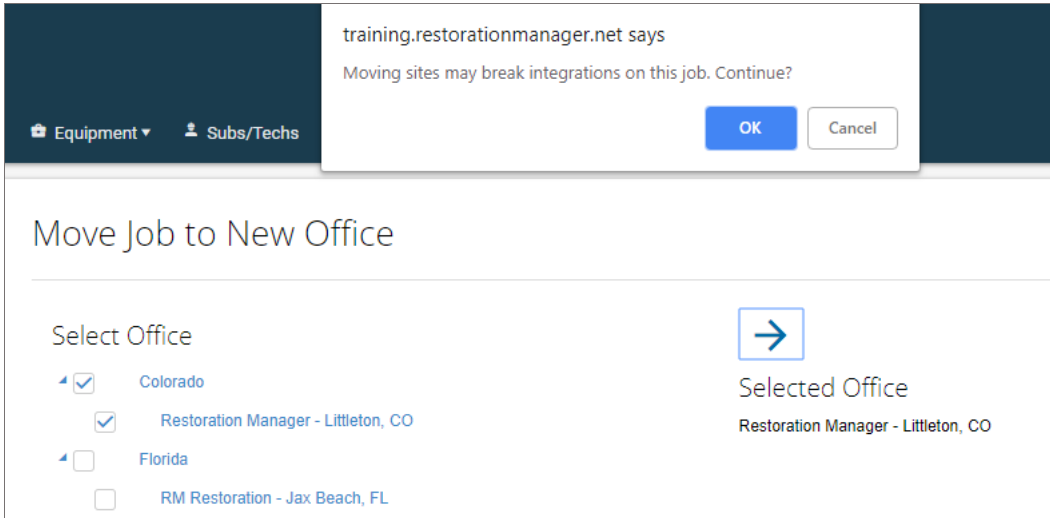
Select Office

- Colorado
  - Restoration Manager - Littleton, CO
- Florida
  - RM Restoration - Jax Beach, FL


Continue Office  
 Restoration Manager - Littleton, CO

## Move Jobs Between Sites

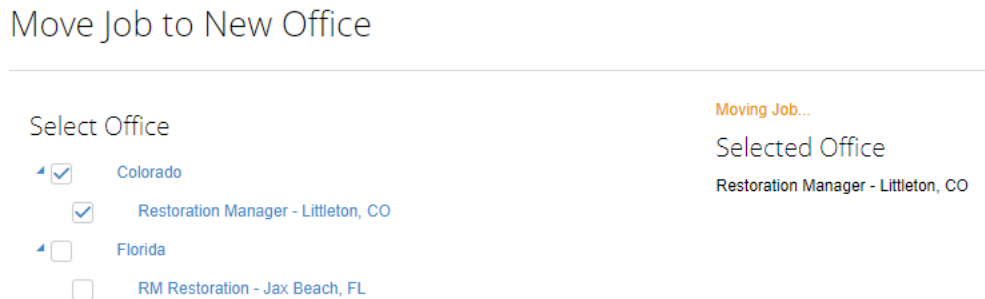
After the continue button has been selected the following pop-up will display click **OK**.



The screenshot shows a dark blue header with 'Equipment' and 'Subs/Techs' dropdowns. A white pop-up dialog box is centered, containing the text: 'training.restorationmanager.net says Moving sites may break integrations on this job. Continue?'. Below the text are two buttons: 'OK' (blue) and 'Cancel' (white). Below the dialog is a white form titled 'Move Job to New Office'. The form has a 'Select Office' section with a list of offices: Colorado (checked), Restoration Manager - Littleton, CO (checked), Florida (unchecked), and RM Restoration - Jax Beach, FL (unchecked). To the right of the list is a blue arrow button labeled 'Selected Office' with the text 'Restoration Manager - Littleton, CO' below it.

**Note:** The only time there will be an issue with an integration is if the job has already been imported into your accounting application. If that is the case then you will need to update the Job ID to match so the costs can export back to the Job. Please don't hesitate to reach out to your assigned trainer to review this in more depth. Thank you!

After clicking **OK** Moving Job... will display.



The screenshot shows the 'Move Job to New Office' form. The 'Select Office' section is the same as in the previous screenshot. To the right of the list, the text 'Moving Job...' is displayed in orange. Below it, the text 'Selected Office' is displayed in black, with 'Restoration Manager - Littleton, CO' below it.


## Move Jobs Between Sites

After Moving Job... is complete the page will redirect to the moved Job.

*Note: If auto generated Job ID's are being used the Job ID will be updated to the next Job ID.*


<b>Job Name:</b> Storm - Roof Damage	<b>Job #:</b> RM19-113ROOF	<b>Job Progress:</b> Inspection Scheduled	<b>Loss Type:</b> Roof
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**Danielle Smith, Family Member** 904-226-5555 - Home 12:00-8:00pm ONLY


369 3rd Street, Jax Beach, FL 32250 



**Tasks:** 3 Incomplete: 0 Due Today: 0 Overdue: 0 Future: 0 


**Documents:** 3

**Correspondence:** 9 

**WOs:** 1 Open: 1 Due Today: 0 Overdue: 1 Review: 0 Repair: 1


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

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

Detail	Job Contacts (2)	Additional Contacts (5)	Losses (1)	Schedules (3)	Tasks (3)	Subs/Techs	Financials	Correspondence (9)
Documents & Pics (3)	Document Merge	Inspections	Moisture Readings (1)	Equipment	Change Log			

**General**

Company:  

Company Contact:  Company Billing Contact:

**ID:** RM19-113ROOF  Red Flag  Billing and Collections Notes

Job Name: Storm - Roof Damage  Custom Job Name \*Default is Primary Job Contact Name

Claim #:

Address:  Year Built:

Building:  Area:

City:  State:  Zip:

County:

**Employee**

Project Mgr:

Estimator:

Lead Tech:

Marketing Rep:

Call Taker:

Accountant:

Email Sync: