



Sample - Correspondence Types

If you would like additional Correspondence Types added they can only be added by our Support Department. You can submit a request directly to our support department servicesoftware@verisk.com or email your assigned trainer and they can submit a ticket to our Support Department.

Note: Correspondence Types populate within Correspondence on a Job, Company and Sub/Tech records and is also searchable. Correspondence Type also populates within the following Reports Sales Activity, Company Correspondence Summary & Detail, Other Correspondence Summary & Detail and Sub/Tech Correspondence Summary & Detail.

Sample Correspondence Types
Adjuster Notes
Agent Notes
Client Breakfast
Client Lunch
Client Dinner
Coffee/Donuts
Cold Call
Community Based Event
Conversation
Email Campaign
Event
Face to Face
Gift Drop Off
Job Monitoring
Lunch & Learn
Marketing
Meeting
Office Visit
Production Phase
Special Event
Time/Hrs
Voicemail



Sample - Correspondence Types

Correspondence – Job, Company and Sub/Tech records:

Job	Face to Face
	Fax
Detail	Field Note
Docur	Gift Drop Off
Type	Job Monitoring
Search	Letter
When	Marketing
02/01/	Meeting
	Note
02/01/	Office Visit
02/01/	Payment
02/01/	Phone Call
	Picture/File
	Production Phase
Type:	Production Phase

Correspondence Search:

Type: Status: By:

Search:

When	Type	Subject	Initiate	With	Status	Task	By	Link	Job #
02/01/2019 01:44 PM	Text	Job Contact - Michael Carpenter has Customer Contacted on 2/1/2019 3:30:00 PM	To	2199736812@messaging.s		No	Dawn Bryant		19-105STM
02/01/2019 01:28 PM	Text	New Lead for Michael Carpenter - Loss Type: Storm Damage	To	2199736812@messaging.s		No	Dawn Bryant		19-105STM
02/01/2019 01:28 PM	Email	New Lead/Job Information: Job ID 19-105STM for Michael Carpenter	To	dbryant@verisk.com		No	Dawn Bryant		19-105STM
02/01/2019 12:45 PM	Email	Welcome Email	To	Michael Carpenter		No	Sales Rep		19-105STM

Sales Activity Report:

Sales Activity							07/01/2018
For All Dates							
Dawn Bryant							
Date/Time	Type	Subject	With	Company	Company Code	Territory	
01/31/2018 09:39 AM	Office Visit	New Contact - 1st Visit Amount Spent: \$12.57	To: Ashley Jones-Bell Receipt #: na	Jax Beach Agency			
05/11/2018 09:18 AM	Coffee/Donuts	Dunkin Dounuts Amount Spent: \$35.10	To: Jax Property Mgmt Receipt #: 1257789	*Jacksonville Property Mgmt			
05/11/2018 09:47 AM	Office Visit	Second office visit	To: Jax Property Mgmt	*Jacksonville Property Mgmt			
05/11/2018 09:55 AM	Text	Text Message Sent	To: Michael Jasper (2199736812@messaging.sprintpcs.com)	*Jacksonville Property Mgmt			
06/19/2018 10:00 AM	Coffee/Donuts	Dunkin Donuts Amount Spent: \$13.25	To: Dawn's Rockin' Agency Receipt #: 4646984761	Dawn's Rockin' Agency	DRA		
Summary for Dawn Bryant							
	Office Visit	2	\$12.57				
	Coffee/Donuts	2	\$48.35				
	Text	1					
	Total	5	\$60.92				



Sample - Correspondence Types

Correspondence Summary Report:

Correspondence				07/01/2018	
For All Dates					
Address	Claim #	Company	Job Contact Information		
125 NW 2nd Avenue, Jax Beach, FL 32250	2356981321 65464-W	State Farm	Drake Stapleton		
Project Mgr: Matt Rudd		Estimator: Dawn Bryant			
Date/Time	Type	Subject	With	By	Progress
03/21/2018	Email	Loss 1148 has been opened on 1/10/2018 4:28:00 PM	To: dawn@servicesoftwareinc.com	Dawn Bryant	
Loss 1148 has been opened on 1/10/2018 4:28:00 PM, in Office RM Restoration, for address: 125 NW 2nd Avenue, Jax Beach, FL 32250					
04/17/2018	Text	Text Message Sent	To: Drake Stapleton (2199736812@messaging.sprintpcs.com)	Dawn Bryant	Complete
dfkjrjetjeortn fgvl, d					
05/05/2018	Email	In Production – Job Scheduled: Drake Stapleton - 18-110H20 - Water	To: dawn@servicesoftwareinc.com	Dawn Bryant	

Correspondence Detail Report:

Correspondence Detail		07/01/2018	
Address: 125 NW 2nd Avenue, Jax Beach, FL 32250	Claim #: 23569813 2165464- W		
Company: State Farm	:		
Job: Drake Stapleton	:		
Phone: 904-333-5555 - Cell	Project Mgr: Matt Rudd		
	Estimator: Dawn Bryant		
Date/Time: 05/05/2018			
To: dawn@servicesoftwareinc.com			
By: Dawn Bryant			
Type: Email			
Subject: In Production – Job Scheduled: Drake Stapleton - 18-110H20 - Water			
Progress:			
Detail:			