



Samples - Referred by

The administrator of the application can add or edit Referred By descriptions in Restoration Manager by going to Settings→ System Setup→ Settings→ Other Settings, Referred By

Note: Referred By appears within the Header of the Job. Referred By also populates within the following Reports Preliminary Report, Job Detail Report, and Marketing.

Referred By Sample Descriptions
1800 Board-up
Adjuster
Advertising
Agent
BBB - Better Business Bureau
Carpet Cleaner
Cold Call
Competitor
Emergency Dispatch
Employee
Fire Department
Friend or Relative
Insurance Company
Internet/Web Search
Jobsite/Vehicle Signs
Networking Group
Other
Plumber
Police Department
Preferred Program
Property Manager
Relator
Previous Customer
Sponsorship (school, baseball, etc.)
Subcontractor



Samples - Referred by

Job Detail Header:

Job - Cause of Loss: Fire

Job #: 19-114RCON

Job Progress **Customer Contacted**

Loss Type: Reconstruction



Tommy Pickles, Owner 303-800-5182 - Cell
3041 Dalry Drive, Jacksonville, FL 32246



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

Documents: 2

Correspondence: 3

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

Equipment: Out: 0 Returned: Total: 0

Reported By Customer
Referred By Advertising
Source of Referral Website (Other Referral Sources)

Preliminary Report:

RM Restoration
7991 Shaffer Parkway, Suite 300
Jax Beach, FL 32250
Office: (303) 800-5182 | Fax: (866) 413-0928

Preliminary Report Reconstruction

02/02/2019

Job #: 19-114RCON

Project Mgr: Project Manager 303-800-1111 - Cell
Estimator: Dawn Bryant (303) 987-6543 - Cell (866) 954-2365 - Fax
Lead Tech: Lead Tech **Marketing Rep:** Sales Rep

Company: Nationwide Insurance
Contact:
Billing/Policy Holder: Tommy Pickles
Billing Contact: Tommy Pickles
Address: 3041 Dalry Drive, Jacksonville, FL 32246
Phone: 303-800-5182 - Cell

Job - Cause of Loss: Fire
Job Contact Information: Tommy Pickles (Primary) 303-800-5182 - Cell

Job Address: 3041 Dalry Drive, Jacksonville, FL 32246

Claim #:

Deductible: 1500.00

Policy Info:

Loan #:

Lockbox Code: 4578914

Gate/Gar. Code:

Other Info: NA

Job Notes:

Additional Contacts

Reported By: Customer
Referred By: Advertising
Source of Referral: Website - Other Referral Sources



Samples - Referred by

Job Detail Report:

RM Restoration
 7991 Shaffer Parkway, Suite 300
 Jax Beach, FL 32250
 Office: (303) 800-5182 | Fax: (866) 413-0928

Job Detail - For Date Received between 01/01/2019 and 12/31/2019

02/02/2019

Job Progress	Customer Contacted	Status	Active	Red Flag	
Job #	19-114RCON				
Type of Loss	Reconstruction				
Loss Details					
Date Received	03/21/2019				
Work Start Date		Project Mgr	Project Manager	Estimator	Dawn Bryant
				Lead Tech	Lead Tech
Job Completed		Date Closed		Reason for Closing	
Accounting		Additional Contacts		Billing Contact	Loss Address
Estimate	\$0.00	Reported by	Customer	Contact	Tommy Pickles
Budget		Referred by	Advertising	Address	3041 Dalry Drive
Actual	\$0.00	Source of Referral	Website		Jacksonville, FL 32246
Invoiced		Other Referral Sources			
Collected		Adjuster		Phone 1	303-800-5182
Unpaid				Phone 2	
Gross Profit %		Agent		Phone 3	
Over/Under Budget				Email	

Marketing Report:

RM Restoration
 7991 Shaffer Parkway, Suite 300
 Jax Beach, FL 32250
 Office: (303) 800-5182 | Fax: (866) 413-0928

Marketing Report

02/02/2019

For Date of Loss between 01/01/2019 and 03/31/2019, subtotaled by Estimator

RM Restoration

Estimator Dawn Bryant

Job #	Loss Type	Date of Loss	Progress	Source of Referral By	Source of Referral Company	Referred By	Loss Owner	Estimate	Actual Exp	GP%
2019-INTERNAL	Internal	01/01/2019	New Lead/Job				RM Restoration	\$0	\$0	
AFTER HOURS 1	Internal	02/18/2019	New Lead/Job				AFTER HOURS	\$0	\$0	
19-599RCON	Reconstruction	03/01/2019	WA/Contract Signed	Dawn Bryant	RM Restoration Employees	Employee	SP Wendys	\$0	\$0	
19-100RCON	Reconstruction	01/01/2019	Estimate Uploaded	Alacrity	TPA - Third Party Administrator	TPA/Preferred Program	Mary Ann Jones	\$1,000	\$250	75%
19-101STM	Storm Damage	01/03/2019	In Production	Website	Other Referral Sources	Advertising	Gregg Young	\$2,332	\$0	100%
19-102RCON	Reconstruction	01/14/2019	Inspection Scheduled			Advertising	Jameis Winston	\$500	\$0	100%
19-103H20	Water Damage	01/29/2019	Customer Contacted	Previous Customer	Other Referral Sources	Previous Customer	Shiloh Condo - CC#1321654	\$0	\$0	
19-104WARR	Warranty	01/23/2019	Customer Contacted	Rena Bradley	Dawn's Rockin' Agency	Agent	Mary Ann Jones	\$0	\$0	
19-105STM	Storm Damage	02/01/2019	Customer Contacted	Social Media	Other Referral Sources	Social Media	Michael Carpenter	\$0	\$0	
19-106H20	Water Damage	02/04/2019	Customer Contacted	Joe Smith	Allstate	Adjuster	Ashley Smith	\$0	\$0	
19-107ROOF	Roof	02/06/2019	New Lead/Job	Jobsite Signs	Other Referral Sources	Advertising	Jameis Winston	\$0	\$0	
19-108H20	Water Damage	02/22/2019	Customer Contacted	Billboard	Other Referral Sources	Advertising	Kim Futural	\$0	\$0	
19-109BIO	BioHazard	02/16/2019	Customer Contacted	Vehicle Signs	Other Referral Sources	Advertising	Maxwell Smith	\$0	\$0	
19-110REM	Remodeling	02/23/2019	Customer Contacted	Joni Michaels	Travelers	Adjuster	Starbucks	\$0	\$0	
19-111H20	Water Damage	03/06/2019	Customer Contacted				Joe's Crab Shack	\$0	\$0	
19-112RCON	Reconstruction	03/05/2019	WA/Contract Signed	Jags Football Youth Camp	Sponsorship	Sponsor	Jason Stokes	\$0	\$0	
19-113REM	Remodeling	03/01/2019	WA/Contract Signed	Billboard	Other Referral Sources	Advertising	Designer Desserts	\$0	\$0	
19-114RCON	Reconstruction	03/21/2019	Customer Contacted	Website	Other Referral Sources	Advertising	Tommy Pickles	\$0	\$0	
19-115RCON	Reconstruction	03/17/2019	Customer Contacted	Michael Jasper	*Jacksonville Property Mgmt	Property Management	Malik Jackson	\$0	\$0	
19-116H20	Water Damage	02/02/2019	Inspection Scheduled	Vehicle Signs	Other Referral Sources	Advertising	James Arthur	\$0	\$0	
Subtotal for Dawn Bryant					20 Jobs			\$3,832	\$250	93%
RM Restoration Total:					20 Jobs			\$3,832	\$250	93%
Grand Total:					20 Jobs			\$3,832	\$250	93%