

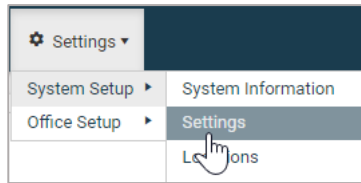
XA Job Mapping

When an XactAnalysis Assignment is exported to Restoration Manager there are some fields that need to be manually adjusted and/or added such as Company, Loss Type, Referred by, etc.

Within the XA Job Mapping table the Carrier ID and Carrier Name are added from the xml file that is processed from the assignment.

Note: Initially this may be continual setup for the admin as assignments come in from XactAnalysis.

The administration will need to go to Settings → System Setup → Settings → Other Settings, XA Job Mapping.



Other Settings

[Task Types](#)

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System Settings

Carried Id	Carrier Name	Company	Referred By	TPA	Other Type	Other	Status	
2210000	Safe Haven - Staff	Oceanside Insurance	TPA/Program	TPA/Preferred Programs	Source of Referral	Oceanside Insurance	Active	 
3364610	Service Software - Staff	Oceanside Insurance	TPA/Program	TPA/Preferred Programs	Source of Referral	TPA/Preferred Programs	Active	 

By adding the Company, Referred By, TPA, Other Type, and Other fields this will minimize the information that needed to be adjusted or added manually, as well as keeping information consistent. Click the pencil to edit.

Edit ×

Carried Id:

Carrier Name:

Company:



Referred By:

TPA:

Other Type:

Other:

Status:



XA Job Mapping

Select the Company from the Company.

Edit

Carried Id	3364610
Carrier Name	Service Software - Staff
Company	<input type="text" value=""/>
Referred By	<input type="text" value=""/>
TPA	*1st American Management Company
Other Type	*Jacksonville Property Mgmt - 904-000-0000
Other	-AFTER HOURS-
Status	911 Restoration - St. Pete

AAA
Allstate Insurance Corporate (National)
Bank of America
BR Agency
Brooks Insurance Company
Church Mutual

Save Close

Select Referred by, if applicable.

Edit

Carried Id	3364610
Carrier Name	Service Software - Staff
Company	Oceanside Insurance
Referred By	<input type="text" value=""/>
TPA	<input type="text" value=""/>
Other Type	Adjuster
Other	Advertising
Status	Agent

Cold Call
Competitor
Employee

Save Close



XA Job Mapping

Select the TPA (Third Party Administrator / Program), if applicable.

The screenshot shows the 'Edit' form with the following fields and values:

- Carried Id: 3364610
- Carrier Name: Service Software - Staff
- Company: Oceanside Insurance
- Referred By: TPA/Program
- TPA: (dropdown menu open)
- Other Type: tpa
- Other: (empty)
- Status: (empty)

The TPA dropdown menu is open, showing a search bar with 'tpa' and the following results:

- Alacrity - (TPA/Preferred Programs)
- Code Blue - (TPA/Preferred Programs)
- Contractor Connection - (TPA/Preferred Programs)
- Lions Bridge - (TPA/Preferred Programs)

Select what Other Type you would like to have applied to the Job such as Adjuster, Agent, Source of Referral, etc., if applicable.

The screenshot shows the 'Edit' form with the following fields and values:

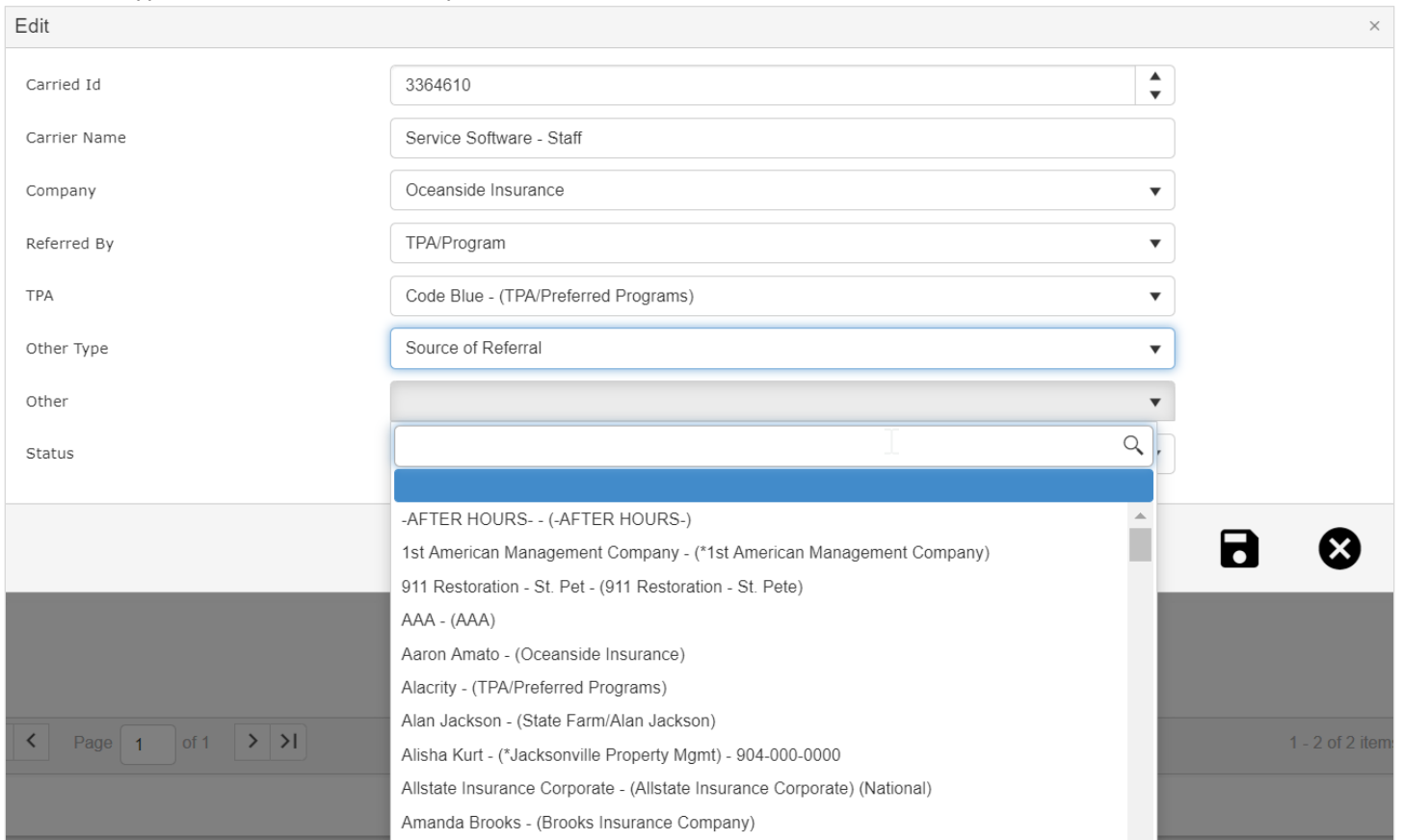
- Carried Id: 3364610
- Carrier Name: Service Software - Staff
- Company: Oceanside Insurance
- Referred By: TPA/Program
- TPA: Code Blue - (TPA/Preferred Programs)
- Other Type: (dropdown menu open)
- Other: (empty)
- Status: (empty)

The Other Type dropdown menu is open, showing a search bar and the following results:

- Adjuster
- Agent
- Source of Referral
- TPA
- Insurance Company
- Mortgage Company
- Property Manager

XA Job Mapping

Select Other which is the Contact of the Other Type previously selected. Example if Source of Referral was selected as the Other Type then in the Other field you would select who is the Source of Referral.



Carried Id: 3364610

Carrier Name: Service Software - Staff

Company: Oceanside Insurance

Referred By: TPA/Program

TPA: Code Blue - (TPA/Preferred Programs)

Other Type: Source of Referral

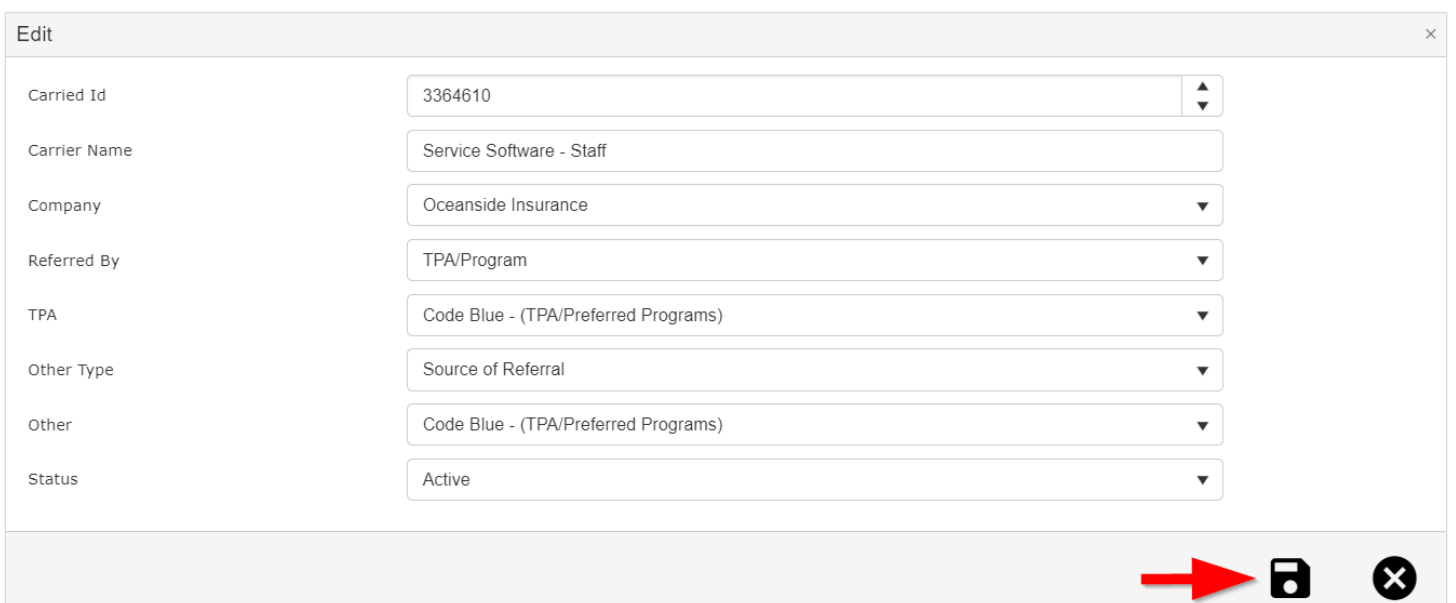
Other: -AFTER HOURS- - (-AFTER HOURS-)

Status: [Empty]

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1 - 2 of 2 items

After you have finished adding the details that are applicable to the Carrier ID / Carrier Name click Save.



Carried Id: 3364610

Carrier Name: Service Software - Staff

Company: Oceanside Insurance

Referred By: TPA/Program

TPA: Code Blue - (TPA/Preferred Programs)

Other Type: Source of Referral

Other: Code Blue - (TPA/Preferred Programs)

Status: Active

Save