

XA Trans ID – Adding Manually

The XA Trans ID cannot be applied to the Job in Restoration Manager until the first assignment exports from XactAnalysis.

The following Employee Permissions need to be selected in order to add the XA Trans ID.

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

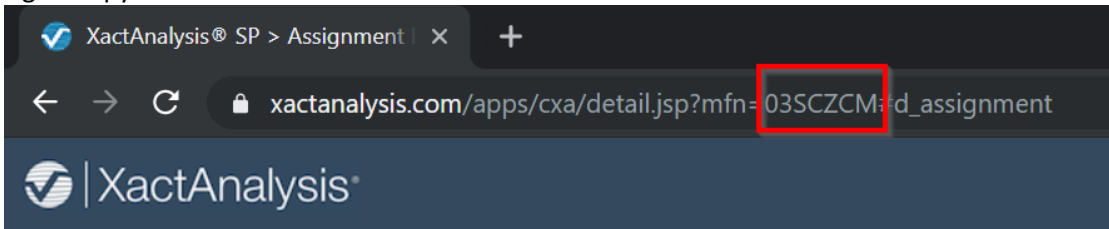
PERMISSIONS
 Toggle All

Charges | Dashboard | Integrations | Correspondence
 Re-open Charges | Allow GP Graph View | Create Xactimate® Project | Delete
 Edit

Inspections | XA | Manager's Dashboard
 Allow Review | Enable Send Correspondence to XA | Job Summary By Employee
 Edit On Hold | Enable Send Documents & Pics to XA | Project Management Summary
 Re-open Template | Enable XA Trans ID Entry | Sales/Estimates By Employee
 Task Performance Analytics

When you have a job in Restoration Manager and want to connect the Job to an existing XactAnalysis assignment the XA Trans ID will need to be applied to the Job in Restoration Manager.

Go to the assignment in XactAnalysis the Trans ID is located within the address bar after the equal sign and before the # sign. Copy the Trans ID.



Next go to the Job in Restoration Manager and paste the XA Trans ID into the Job Snapshot then click Save.

Job Snapshot

Job Profitability and Accounting

Average Age: 67.7

Estimate: \$16,468.03

Budget: \$2,283.21

Total Costs: \$0.00

Gross Profit: \$16,468.03

GP%: 100.00%

Over/Under Budget: \$2,283.21

Invoiced: \$16,468.03

Payment Rcvd: \$0.00

Unpaid Balance: \$16,468.03

% Complete: 0%

Estimator and Sales

Losses: 1010

Date of Loss: 05/03/2019 12:10 PM

Date Received: 05/03/2019 12:10 PM

Customer Contacted: 05/03/2019 12:10 PM

Site Inspection Appt: 05/03/2019 1:00 PM

End: 05/03/2019 2:00 PM

By: Dawn Bryant

Site Inspected: []

Estimate Uploaded: []

Estimate Approved: []

WA/Contract Signed: []

Production and Accounting

Loss Type: Water

Target Start Date: []

Target Completion: []

Job Started: 05/03/2019 1:00 PM

End: 05/10/2019 4:00 PM

Drying Started: []

Drying Completed: []

Job Completed: []

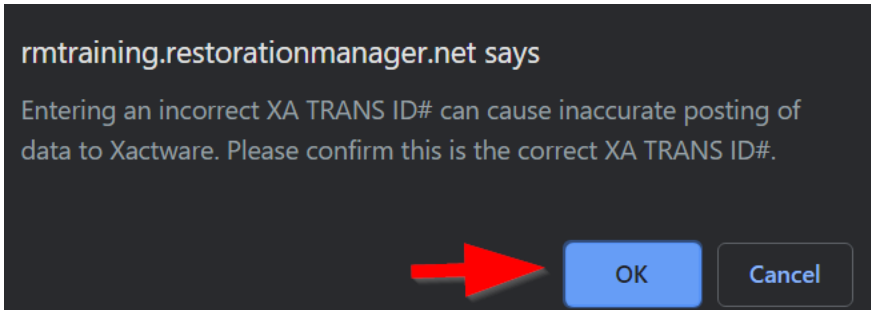
Date Closed: []

Job Not Sold: []

Send Job to Xactimate®
XA TRANS ID#: 03SCZCM
 Progress: In Production

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After saving the following pop-up will display click OK to proceed.



The Job will update displaying the XA icons in the Job Snapshot


Job Name: Waiting on WA Signature


Job #: 19-0007-WTR

Job Progress In Production

Loss Type: Water

XA Job Type:



Aveline Rose, Property Owner 904-111-1111 - Cell dbryant@verisk.com
 212 Ponte Vedra Park Dr, Ponte Vedra Beach, FL 32082
 

Tasks: 0 **Incomplete:** 0 **Due Today:** 0 **Overdue:** 0 **Future:** 0 +
Documents: 8
Correspondence: 2 +
WOs: 3 **Open:** 3 **Due Today:** 0 **Overdue:** 3 **Review:** 0 **Repair:** 0
Equipment: **Out:** 0 **Returned:** **Total:** 0

Referred By Advertising
Source of Referral Billboard (Other Referral Sources)

Job Snapshot ✕

Job Profitability and Accounting

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Estimator and Sales

Losses: 1010 ☰

Date of Loss: 05/03/2019 12:10 PM 🕒 ✓

Date Received: 05/03/2019 12:10 PM 🕒 ✓

Customer Contacted: 05/03/2019 12:10 PM 🕒 ✓

Site Inspection Appt: 05/03/2019 1:00 PM 🕒

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By: Dawn Bryant ▼

Site Inspected: 🕒 ✓

Estimate Uploaded: 🕒

Estimate Approved: 🕒 ✓

WA/Contract Signed: 🕒

XA TRANS ID#: 03SCZCM 🔗

Progress: In Production ▼

📁
✕

Production and Accounting

Loss Type: Water ▼

Target Start Date: 🕒

Target Completion: 🕒

Job Started: 05/03/2019 1:00 PM 🕒

End: 05/10/2019 4:00 PM 🕒

Drying Started: 🕒

Drying Completed: 🕒

Job Completed: 🕒

Date Closed: 🕒

Job Not Sold: 🕒

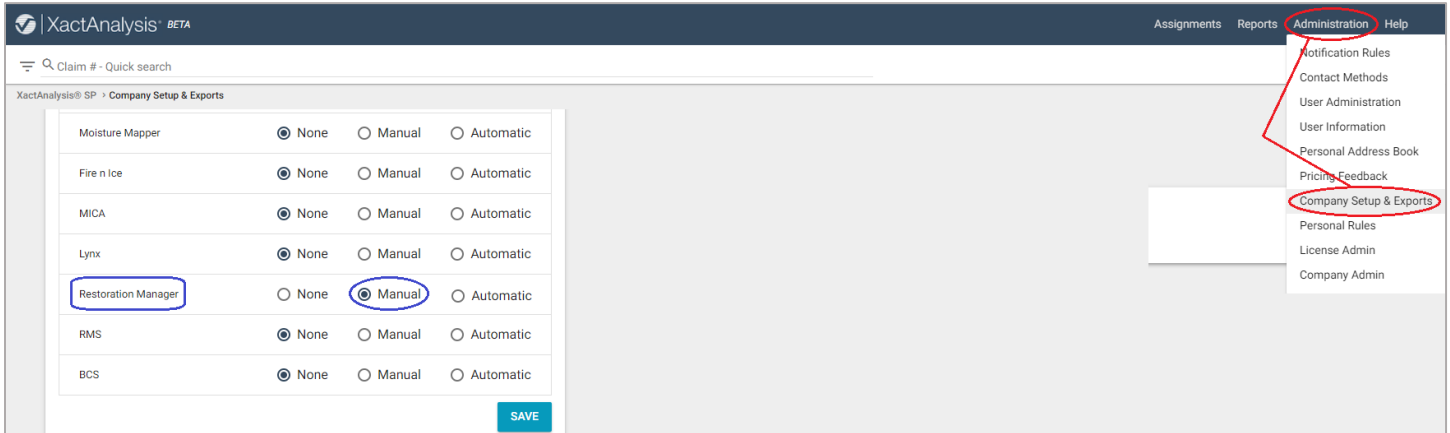
Revised 08/03/2019

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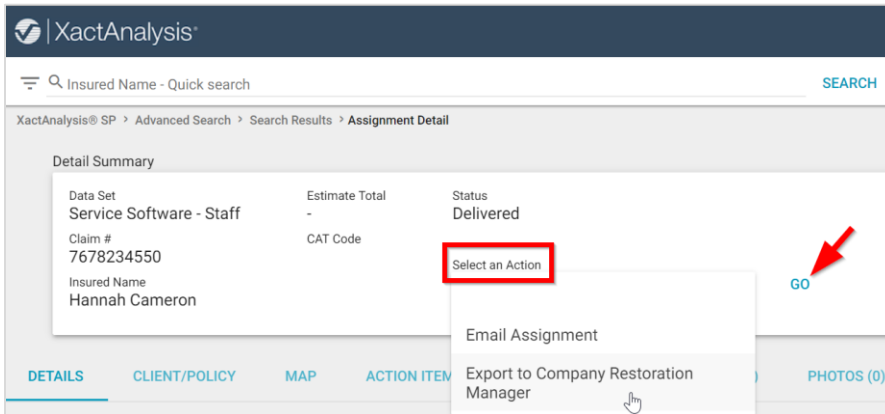
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Last step to complete the connection as well to ensure Dates / Time Stamps, Notes, Documents and Photos export from XA back to the Job in Restoration Manager. The assignment will still need to be exported, this will not create another Job in Restoration Manager.

In XactAnalysis if Restoration Manager is set to Automatic it will need to be changed to Manual before the assignment can be exported. Go to Administration→ Company Setup & Exports→ Restoration Manager select Manual → Click Save.



Go to the assignment detail page from the Select an Action drop-down menu select Export to Company Restoration Manager, then click **GO**.



After clicking **GO** the following information will be displayed, click **OKAY** then you'll be redirected back to the assignment detail page and the connection is now complete.

