

Company Contacts – Additional Information

Within the Company Contact Detail Page the following tools and panel of information will display; Tasks and Correspondence, Sales Information, Marketing Categories and Jobs Referred. Below is an overview of these sections.

Tasks and Correspondence:

Single click the Tasks and Correspondence ribbon it will expand and defaults to Correspondence Tab. The Correspondence displayed is all the Correspondence for the contact record you are in. Within this tab you can search, add a New Correspondence, Email the Contact, send an SMS/Text from this Tab or Print a Summary Report. When you click on the Task tab it will display all Tasks for the contact. Within the Task tab you can complete any incomplete Tasks, create a new Task or Print a Summary Report.

Tasks and Correspondence



Correspondence
Tasks

Type: Status: By:

Search:

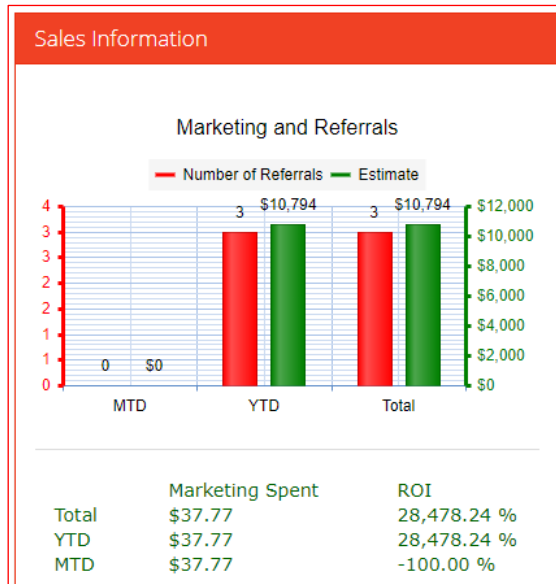
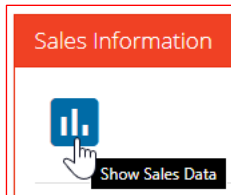
When	Type	Subject	Initiate	With	Status	Task	By	Link	Job #
10/21/2019 09:13 AM	Client Breakfast	Cracker Barrel	To	Michael Jasper		No	Dawn Bryant		
10/12/2019 02:52 PM	Event	Breast Cancer Event	To	Michael Jasper		No	Dawn Bryant		
08/06/2019 02:51 PM	Office Visit	Scheduled Visit	To	Michael Jasper		No	Dawn Bryant		
05/01/2019 02:40 PM	Client Lunch	McDonalds	To	Michael Jasper		No	Dawn Bryant		

Email Contact: Text Contact:

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Sales Information:

Click the Graph icon to show the Sales data. The following information will display MTD referrals in RED, MTD Estimate in Green, YTD referrals in RED, YTD Estimate in Green, Total referrals in RED, Total Estimate in Green. Marketing Spent and ROI (Return on Investment) breakdown; Total, YTD and MTD.



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Marketing Categories

Drag & drop or select & move the Marketing Categories from the left, over to the right side to add them to the contact. These may be interests, associations, etc.

Note: The Administrator of the application can add Marketing Categories by going to Settings→ System Setup→ Settings→ Other Settings, Marketing Categories

Marketing Categories

Drag & drop or select & move Marketing Categories from the left, over to the right side to add them to the contact.

Associations	▶	
CE Class - 2019	◀	
Church	▶▶	
Priority Response	◀◀	
Mailing List		
Sports TEAM		

Jobs Referred:

Displays all jobs the Contact has referred. To resort how the Referrals display, click on the header you prefer to sort by.

Jobs Referred (3)						
COMPANY	DATE RECEIVED	JOB #	PROGRESSS	CONTACT NAME	ESTIMATE VALUE	GO TO JOB
Jacksonville Property Mgmt	06/03/2019	19-0015-WTR	In Production	Aaron Amato	\$0.00	View
Jacksonville Property Mgmt	07/31/2019	19-0274-WTR	WA/Contract Signed	Gator National - Office Complex	\$0.00	View
Jacksonville Property Mgmt	08/21/2019	19-0274-WTR	Job Completed	Turtle Shores	\$0.00	View

COMPANY	DATE RECEIVED	JOB #	PROGRESSS ▲	CONTACT NAME	ESTIMATE VALUE	GO TO JOB
Jacksonville Property Mgmt	06/03/2019	19-0015-WTR	In Production	Aaron Amato	\$0.00	View
Jacksonville Property Mgmt	08/21/2019	19-0274-WTR	Job Completed	Turtle Shores	\$0.00	View
Jacksonville Property Mgmt	07/31/2019	19-0274-WTR	WA/Contract Signed	Gator National - Office Complex	\$0.00	View

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Click **View** hyperlink redirects you to the Job Detail page.

COMPANY	DATE RECEIVED	JOB #	PROGRESS	CONTACT NAME	ESTIMATE VALUE	GO TO JOB
Jacksonville Property Mgmt	08/21/2019	19-0274-WTR	Job Completed	Turtle Shores	\$0.00	View
Jacksonville		WA/Contract		Gator National -		

Job Name: Turtle Shores

Job #: 19-0274-WTR

Job Progress **Job Completed**

Loss Type: Water



Turtle Shores, Property 904-000-0000 - Main dbryant@verisk.com
Anne-Marie Jaxson, Occupant/Tenant 904-000-0000 - Cell
 400 SE 1st Street, Unit 25-A, Jax Beach, FL 32250

Tasks: **8 Incomplete: 8 Due Today: 0 Overdue: 8 Future: 0**

Documents: **2**

Correspondence: **5**

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

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

Referred By: Property Manager
 Source of Referral: Michael Jasper (Jacksonville Property Mgmt)
 Property Manager: Michael Jasper (Jacksonville Property Mgmt)

Job Snapshot

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

General

Company:

Company Contact: Company Billing Contact:

#: Red Flag Billing and Collections Notes

Job Name: Custom Job Name *Default is Primary Job Contact Name

Claim #:

Address: Year Built:

Building: Unit:

City: State: Zip:

Country: County:

Employee

Project Mgr:

Estimator:

Lead Tech:

Marketing Rep:

Call Taker:

Accounting:

Email Sync:

Additional Info

Type:

Deductible: