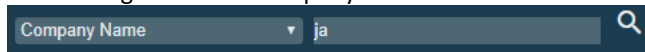


## Company – Inactivating

To inactivate a Company, search the Company using your preferred search.

**Option 1:** From the **Search** located to the top right of the page select Company Name from the drop-down. Begin typing in the Company Name select your enter key or the magnifying glass to complete the search. The less you type in the more results you will return. Single click the Company Name the contact will be added to.



### View Companies

Save Grid Preferences? (uncheck for defaults)

Search icon, Filter icon

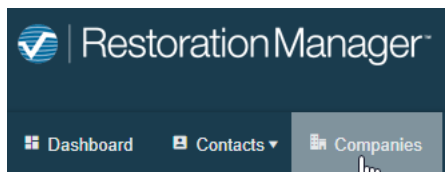
Name: ja

Drag a column header and drop it here to group by

Name	# of Co
<a href="#">Jacksonville Property Manag</a>	5
<a href="#">State Farm/Alan Jackson</a>	1

Go to Company Detail

**Option 2:** Single click on **Companies** in the toolbar, next search within the **Name** search field select your enter key or the magnifying glass to complete the search. The less you type in the more results you will return. Single click the Company Name the contact will be added to.



### View Companies

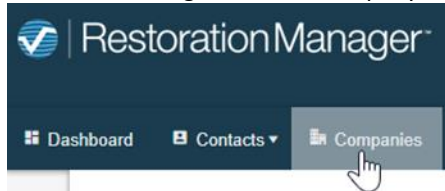
Save Grid Preferences? (uncheck for defaults)

Search icon, Filter icon

Name: state

<a href="#">State Farm</a>	
<a href="#">State Farm</a>	Go to Company Detail

**Option 3:** Single click on **Companies** in the toolbar, next search for the Company from the **Name** drop-down menu once you make the selection single click the Company Name the contact will be added to.



Name

Search icon, Filter icon

Name dropdown menu:

- \*1st American Management Con
- AFTER HOURS-
- 911 Restoration - St. Pete
- AAA
- Allstate Insurance Corporate (Cc
- Bank of America
- BR Agency

Name

BR Agency dropdown menu

BR Agency

Go to Company Detail



## Company – Inactivating

Within the Company Detail page if there are any open records that information is displayed under Work Order Due in Days. Does this Company record have any open Work Orders, Losses and/or Jobs? The open items must be closed, inactivated or reassigned before the record status can change. Click on the hyperlink to redirect you to the information so the details can be reviewed, and adjustments made.

**Jacksonville Property Mgmt**  
**Jacksonville Property Mgmt**  
 2369 1st Street, Suite 300, , Jacksonville Beach, FL 32250

Detail
Contacts (5)
Work Order Setup
Subs/Techs
Tasks (1)
Correspondence (7)
Documents & Pics (3)
Locations (2)
Referrals

Affiliations
Compliance Templates (BETA)

General Information

Name:

Code:

Company Type: Property Management

Account Type: ▼

Office:  All Offices

County:

Address 1:

Address 2:

City:

State: FL Zip:

Country: ▼

Project Mgr: \*\*NOT ASSIGNED\*\*

Estimator: \*\*NOT ASSIGNED\*\*

Lead Tech: Choose an Employee

Work Order Due In Days:

There are [2 WOs](#) open on this Company

There are [6 Losses](#) open on this Company

There are [6 Jobs](#) active on this Company

These items must be closed, inactivated or reassigned in order to inactivate this Company

Sales Information

Marketing and Referrals

— Number of Referrals — Estimates

	Marketing Spent	ROI
Total	\$73.14	33,136.67 %
YTD	\$73.14	33,136.67 %
MTD	\$49.55	-100.00 %

Example; [6 Jobs](#) hyperlink selected which redirected to the View Jobs Page and the 6 active jobs assigned to this Company Record.

### View Jobs

Save Grid Preferences? (uncheck for defaults)

🔍 🔍 📄 ✖

Employee:  Equals ▼ ▼

Company Resources:  Equals ▼ ▼

Contact: Job Contact ▼ Full Name ▼

Drag a column header and drop it here to group by that column

	Job #	Date Received	Progress	Pri Job Contact Name	Loss Type
🗑️ ⚙️ 📈	<a href="#">19-0002-RCN</a>	03/20/2019	Job Completed	Karlee Marshall	Reconstruction
🗑️ ⚙️ 📈	<a href="#">19-0005-REM</a>	06/14/2019	WA/Contract Signed	Turtle Shore Condo's	Remodeling
🗑️ ⚙️ 📈	<a href="#">19-0008-RCN</a>	05/03/2019	Job Completed	Aveline Rose	Reconstruction
🗑️ ⚙️ 📈	<a href="#">19-0015-WTR</a>	06/03/2019	In Production	Aaron Amato	Water
🗑️ ⚙️ 📈	<a href="#">19-0274-WTR</a>	08/21/2019	Job Completed	Turtle Shores	Water
🗑️ ⚙️ 📈	<a href="#">19-0274-WTR</a>	07/31/2019	WA/Contract Signed	Gator National - Office Complex	Water