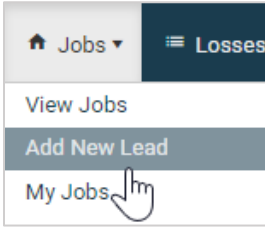


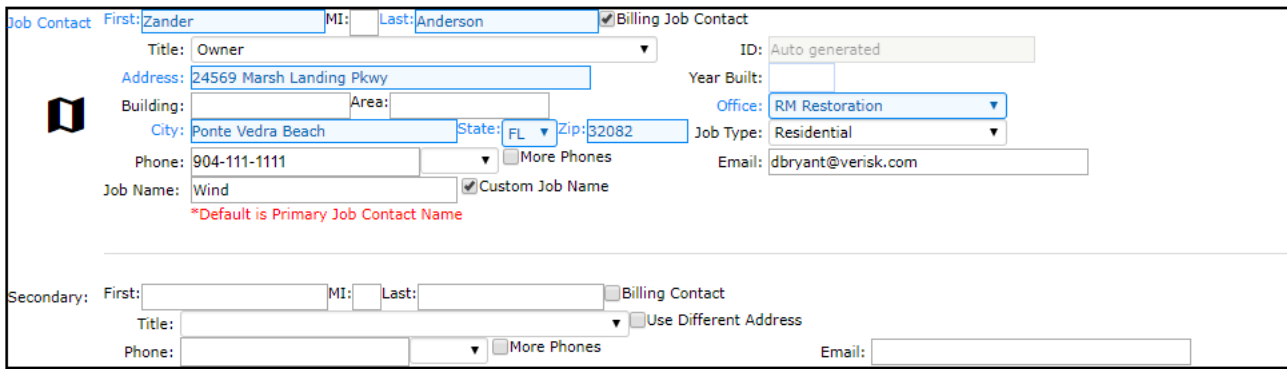
## Adding New Lead/Job

To add a new Lead/Job hover over Jobs in the toolbar and single click on **Add New Lead**.



**Note:** Fields highlighted in Blue are required.

The screen shot below contains the following fields:



- **Job Contact First and Last Name:** *Dependent on the type of job being entered will depend on what will be populated in these fields. If a Residential job is being entered then typically the Job Contact is the Primary contact for the job and the first and last name will be populated. If a Commercial job is being entered then typically the Property and/or place of Business is populated in the Last name field only.*
- **Billing Job Contact or Billing Contact:** *By default Billing Job Contact is checked, this can be unchecked if this is not the information that will be imported into your accounting application. Other options are as follows if the Secondary contact is the information that will be imported into your accounting application please uncheck the defaulted Billing Job Contact and check Billing Contact which is located after the Secondary Last name. If the Primary or Secondary contact is not the information that will need to be imported into your accounting application please ensure that Billing Job Contact and Billing Contact are unchecked. Then by default the Company associated with the job record will be imported into your accounting application.*



## Adding New Lead/Job

- **Title:** The title of the contact being entered such as Owner, Renter/Tenant, Spouse, etc.
- **Address, Building, Unit, City, State and Zip Loss and/or Billing Address:** Apply the address, if the Billing address and Loss address are different then apply the billing address in these fields.
- **Phone & More Phones:** Apply the phone number and next to the phone field is a drop down this is to capture the type. If you need to apply more than one phone number please check More Phones to expand and add up to four (4) additional phone numbers.

- **Job Name:**  Check the box to apply a Custom Job Name, otherwise it will default to the Primary Job Contact Name.
- **Email:** Apply the Primary and Secondary email addresses.
- **ID:** This is the Job ID assigned to the Job and may be set to auto generate. Job ID is required to import the job into your accounting system, also to manage the job in the field through Intuitive Mobile.
- **Year House Built:** Apply the year the house was built (if applicable).
- **Job Type:** This is typically Residential or Commercial. This field cannot be blank if this job is going to be imported into your accounting software.
- **Secondary:** This is typically where the Secondary Job Contact information is applied.
- **Loss Address  Use Different Address From Above:** Check this box to expand the address fields and apply the address where the work will be performed. **Note:** ONLY if the Loss address and Billing address are different.
- **Job Notes:** This field is typically used for special instructions, information applied within this field populates on the Job Detail Page and is visible from ManageIT Mobile and Intuitive Mobile.



## Adding New Lead/Job

Dates		Loss	
- (GMT-06:00) Central Time (US & Canada)			
Date of Loss:	05/03/2020	Time:	4:40 PM
Date Received:	05/03/2020	Time:	4:40 PM
Customer Contacted:	05/03/2020	Time:	4:40 PM
Site Inspection Appt:	05/06/2020	Time:	9:00 AM
End:	05/06/2020	Time:	11:00 AM
By:	Brandon Renne		
		Loss Type:	Fire
		Cause of Loss:	Electrical Malfunction
		Loss Details:	<input type="text"/>
		Create WO	<input type="checkbox"/>

- **Date of Loss and Time:** The date and time fields default to the day and time the page was opened, you can adjust the date and time if applicable. **Note:** These fields are **required** to save the record.
- **Date Received and Time:** The date and time fields default to the day and time the page was opened, you can adjust the date and time if applicable. **Note:** These fields are **required** to save the record.
- **Customer Contacted and Time:** The date and time the customer was contacted to schedule the Site Inspection. These are not required fields so they can be left blank
- **Site Inspection Appt. Date and Time:** This is typically the date and time the Estimator has been scheduled to perform/complete the Site Inspection. **Note:** These fields are not required to save the record, but if the start date and time has been populated and not the end date/time the record will not save until that information has been populated.
- **By:** This is the individual typically the Estimator that will be performing/completing the Site Inspection. If the Date and Time are populated the 'By' field is required to save the record.
- **Loss Type:** Loss Type is a **required** field and selected from the dropdown. Example: Mitigation, Reconstruction, Mold, etc.
- **Cause of Loss:** Description of what caused the damage. This dropdown table is set up by the Administrator of the application by going to Settings→ System Setup→ Settings→ Loss Settings; Cause of Loss.
- **Loss Details:** Typically used for the details of the Loss an overview of further information. Information applied within this field only display within the Loss Detail page.
- **Create WO**  : By checking this box it will expand so further details can be applied this will create an initial work order associated with the job.

Create WO	<input checked="" type="checkbox"/>
Service to be performed:	<input type="text"/>
Area:	<input type="text"/>
Category:	<input type="text"/> Sub Category: <input type="text"/>

**Service to be performed:** typically, a description of what needs to be performed at the job. Example: Setup Equipment in the Kitchen and extract the water.

**Note:** Required to complete the initial work order set-up.

**Area:** is the area of the work is going to be performed in.

**Note:** Required to complete the initial work order set-up.

**Category:** is the category of work. Example: Framing, Drywall, Electrical, etc.

**Note:** Required to complete the initial work order set-up.

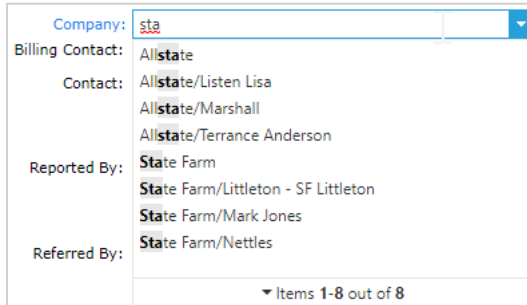
**Sub Category:** further describes the category of work. Example: if Electrical has been selected as the Category then the Sub Category may be Outlet, Light Switches, Fixtures, etc.

## Adding New Lead/Job

- Company: There are many different job scenarios, typically you will be capturing the Company that is responsible to pay the bill. (Typically, this field is the Insurance Company). If you're unsure during the lead entry process please apply UNKNOWN, TBD or TEMP company record so you can proceed forward and save the information.
 

**Note:** Once the job has been saved the Company information can be changed later within the Job Detail page.

Simply begin to type the company name and select the Company you would like to apply to the job.



Company: sta

Billing Contact: Allstate

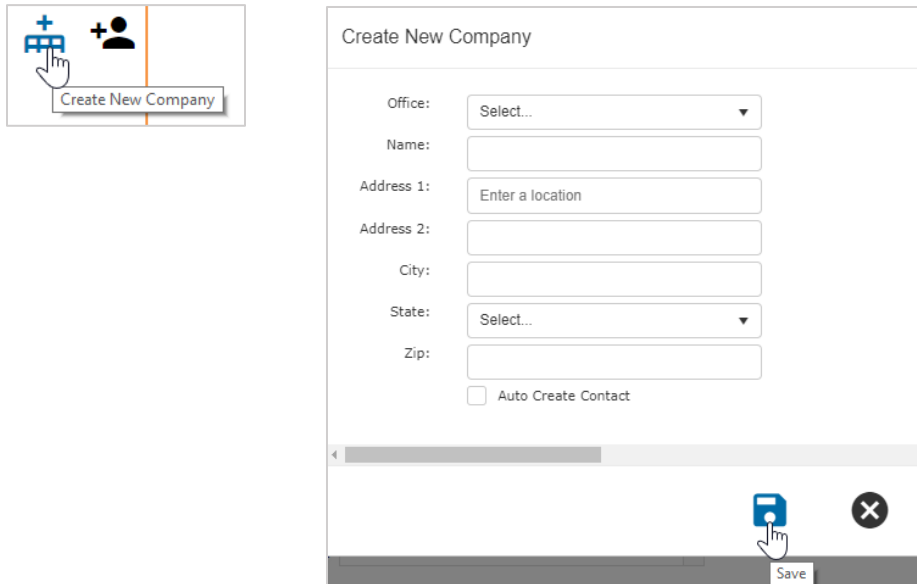
Contact: Allstate/Listen Lisa  
Allstate/Marshall  
Allstate/Terrance Anderson

Reported By: State Farm  
State Farm/Littleton - SF Littleton  
State Farm/Mark Jones

Referred By: State Farm/Nettles

▼ Items 1-8 out of 8

If the Company doesn't display to select you can add a new Company by selecting the building icon **Create New Company**. **Office** and **Name** are required fields.



**Create New Company**

Office: Select...

Name:

Address 1:

Address 2:

City:

State: Select...

Zip:

Auto Create Contact

Save

**Note:** If you have more than one Office select the Office the Company will be available in.

- Reported By:** Select 'Reported By' from the drop down. This dropdown table is set up by the Administrator of the application by going to Settings→ System Setup→ Settings→ Other Settings; Reported By. **Note:** Reported By displays within the Job header, within the Preliminary Report and the Job Detail Report ONLY.
- Referred By:** Select 'Referred By' from the drop down. This dropdown table is set up by the Administrator of the application by going to Settings→ System Setup→ Settings→ Other Settings; Referred By. **Note:** Referred By displays within the Job header, within the Preliminary Report, Job Detail Report, Lead to Sale Summary Report, Marketing Report and Work In Progress Report.



Reported By:

Referred By:



## Adding New Lead/Job

- **Source of Referral:** Select who/what was the source of the referral. Example if Advertising was selected within the Referred By field then the Source of Referral could be Billboard, Jobsite Sign, etc. Simply begin to type a portion of the source then select the record you would like to apply. The Company the source is associated with will display in Parentheses.

Source of Referral: state fa

Agent: Angie Jacs (State Farm)

Adjuster: David Jones (State Farm)

Other: Items 1-18 out of 18

If the Contact doesn't display to select you can add a new Contact by selecting the person icon **Create New Contact**. Apply the information you have **Company, First Name and Last Name** are required fields.

**Create New Contact**

Company: Select or type to search...

Title: Select...

First Name: [Text Field]

Last Name: [Text Field]

Use Same Address as Company

Address 1: Enter a location

Address 2: [Text Field]

City: [Text Field]

State: Select...

Zip: [Text Field]

Email: [Text Field]

Phone 1: [Text Field] S... ▼

Phone 2: [Text Field] S... ▼

Phone 3: [Text Field] S... ▼

Save

- **Agent:** Add the Agent assigned to the job. If you don't have the information during the lead entry this can be added after the job has been saved by going to the Job → Additional Contacts Tab → New Additional Contact.
- **Adjuster:** Add the Adjuster assigned to the job. If you don't have the information during the lead entry this can be added after the job has been saved by going to the Job → Additional Contacts Tab → New Additional Contact.
- **Other:** Select the drop down to display the other options Example: Property Manager, Independent Adjuster, etc. Add the information associated with the job. If you don't have the information during the lead entry this can be added after the job has been saved by going to the Job → Additional Contacts Tab → New Additional Contact.



## Adding New Lead/Job

- **Claim #:** Add the Claim # if applicable to the job.

Claim #:

- **Job Custom Fields:** The fields displayed below are custom fields and are definable in terminology. These fields can be setup by the Administrator by going to Settings→ Office Setup→ Terminology.

**Note:** If you don't have the information above during the lead entry this can be added after the job has been saved by going to the Job→ Job Detail or within Intuitive Mobile.



Deductible:

Policy Info:


Lockbox Code:

Gate/Gar. Code:

Pets:  Yes  No

Lead Test:   

Completion %:

Survey Sent:  

Survey Received:

**Other Information**

Project Mgr:

Estimator:

Lead Tech:

Marketing Rep:


Call Taker:


Accountant:

Email Sync:

---

**Document Merge**

Office:   Select the packets to add and merge.  
\*Ctrl-Click to select multiple items in the list

Company:   All packets will be merged.

- **Project Mgr:** Select the employee from the drop down
- **Estimator:** Select the employee from the drop down
- **IMPORTANT:** Project Mgr and Estimator are **required** fields. If you are unsure of the assignment during the lead entry select the **\*\* NOT ASSIGNED\*\*** record so the record can be saved.
- **Lead Tech:** Select the employee from the drop down
- **Marketing Rep:** Select the employee from the drop down \*May pre-populate if the Marketing Rep is assigned to the referral source.
- **Call Taker:** Select the employee from the drop down
- **Accountant:** Select the employee from the drop down
- **Email Sync:** Select the employee from the drop down
- **Note:** If the employee assignment hasn't been made during the lead entry this can be added after the job has been saved by going to the Job→ Job Detail.
- **IMPORTANT:** The following fields displayed below are custom fields and are definable in terminology. This can be setup by the Administrator by going to Settings→ Office Setup→ Terminology.
- **Document Merge:** Select the packets to add and merge the Document(s) within the packet.
- **Note:** Word document merge packets are setup by the Administrator.

## Adding New Lead/Job



Click **Save** to continue or **Cancel** if you no longer need to create the record.

After selecting **Save** a pop-up message will display with status of saving the lead. Once the save is complete the page will automatically redirect to the job.

Job Name: Chris Lane

Job #: 20-0513-WTR

Job Progress **Site Inspected**

Loss Type: Water

Cause of Loss: Sewer Back-up



Chris Lane, Policy Holder 904-222-0000 - Cell [dbrvant@verisk.com](mailto:dbrvant@verisk.com)  
764 7th Ave S, Jacksonville Beach, FL 32250


Tasks: 4 Incomplete: 2 Due Today: 0 Overdue: 2 Future: 0 +  
Documents: 1  
Correspondence: 0 +  
WOs: 0 Open: 0 Due Today: 0 Overdue: 0 Review: 0 Repair: 0  
Equipment: Out: 0 Returned: Total: 0

Referred By: TPA/Program  
Adjuster: Dylan Michaels (Oceanside Insurance)  
Source of Referral: Alacrity (TPA/Preferred Programs)

### Job Snapshot

- Detail
- Job Contacts (1)
- Additional Contacts (2)
- Losses (1)
- Schedules
- Tasks (4)
- Subs/Techs
- Financials
- Correspondence
- Documents & Pics (1)
- Document Merge
- Inspections
- Moisture Readings
- Equipment
- Change Log

#### General

Company: Oceanside Insurance - Priority 

Company Contact:  Company Billing Contact:

#: 20-0513-WTR  Red Flag  Billing and Collections Notes

Job Name: Auto generated  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: