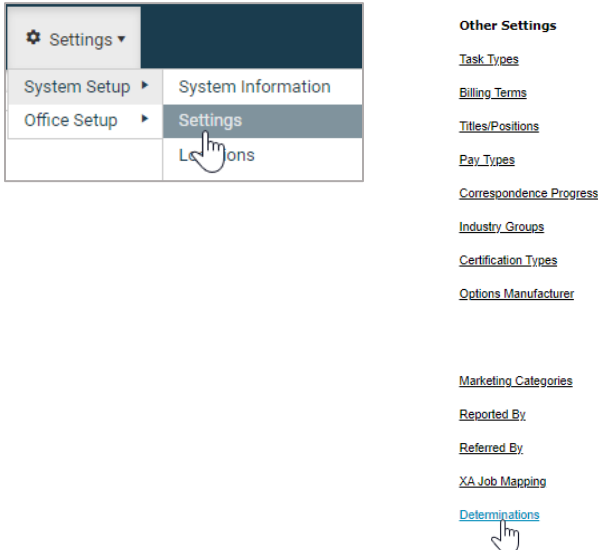


## Determinations - Setup

Determinations are used within a Job to apply the reason a Job was closed or why the Job wasn't Sold. Users can also capture Determinations within a Work Order the reason a Work Order was closed such as No Damage, Work Completed, etc.


The Admin can setup Determinations by going to Settings → System Setup → Settings → Other Settings, Determinations



Click the New Entry icon to add Determination descriptions.

**Determination:**


Description	Define as WO	Define as Job	Order	Status
Payment Received in Full	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	Active
Cashed Out	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
Customer chose another company	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
Customer completing the work themselves	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
Customer didn't accept estimate	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
Denied Insured not pursuing the claim	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
Lack of Funds	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
No Coverage	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
No Damage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active

 New Entry

The page expands, complete the following steps.

Description:  Order:  Status:

Define as WO  Define as Job

Add

1. Add the Determination description
2. Add an Order number (if applicable)
3. Define as WO, Define as Job or check both, by making a selection the Determination description will display within a Work Order, within the Job Snapshot or both areas.
4. Click Add

Proceed with steps 1-4 until all Determinations have been entered.

## Determinations - Setup

To edit or inactivate an existing Determination click the row to expand.

**Determination:**

Description	Define as WO	Define as Job	Order	Status
Payment Received in Full	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	Active
Cashed Out	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
Customer chose another company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
Customer completing the work themselves	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
Customer didn't accept estimate	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
Denied Insured not pursuing the claim	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
Lack of Funds	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
No Coverage	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active
No Damage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	Active

Description:  Order:  Status:

Define as WO  Define as Job



The Determination dropdown displays within the Job Snapshot when Date Closed is applied or when Job Not Sold is applied. Determination will also display within Work Orders.

Job → Job Snapshot

**Job Profitability and Accounting**

Average Age: 94.3

Estimate: \$3,381.45

Budget: \$752.36

Total Costs: \$4.50

Gross Profit: \$3,376.95

GP%: 99.86%

Over/Under Budget: \$747.86

Invoiced: \$0.00

Payment Rcvd: \$0.00

Unpaid Balance: \$0.00

% Complete: 0%

**Estimator and Sales**

Losses: 1035

Date of Loss: 01/14/2020 3:50 PM

Date Received: 01/14/2020 3:50 PM

Customer Contacted: 01/14/2020 3:50 PM

Site Inspection Appt: [ ]

End: [ ]

By: Choose an Employee

Site Inspected: 01/14/2020 4:30 PM

Estimate Uploaded: 01/30/2020

Estimate Approved: 01/14/2020

WA/Contract Signed: 01/14/2020

**Production and Accounting**

Loss Type: Water

Cause of Loss: [ ]

Target Start Date: [ ]

Target Completion: 01/24/2020 12:00 AM

Job Started: 01/14/2020 4:30 PM

End: 01/24/2020 3:33 PM

Drying Started: 01/14/2020 4:30 PM

Drying Completed: 01/17/2020 11:00 AM

Job Completed: 01/22/2020

Date Closed: 02/28/2020

Job Not Sold: [ ]

Send Job to Xactimate

XA TRANS ID#: [ ]

Progress: Paid in Full - File Closed

**Determination: Payment Received in Full**

## Work Order

WO DETAILS | SIGN OFFS | NOTES | BUDGET\*\* | PICTURES | BILLING | REQUEST FOR BID | DOCUMENTS

**WO Details**

Area: Multiple Rooms

Category: DMO-Demolition

Sub Category: [ ]

Option: [ ]

**Determination**

- No Damage
- No response from the Customer
- Work Completed

**Work Description:**

- Basement Basement Living Room - Tear out wet drywall, cleanup, bag for disposal [Action: Remove]
- Basement Basement Living Room - Tear out wet non-salvageable carpet, cut & bag for disp. [Action: Remove]
- Basement Basement Living Room - Tear out wet carpet pad and bag for disposal [Action: Remove]
- Basement Basement Living Room - Protect - Cover with plastic [Action: Replace]
- Basement Bedroom 1 - Tear out wet non-salvageable carpet, cut & bag for disp. [Action: Remove]
- Basement Bedroom 1 - Tear out wet carpet pad and bag for disposal [Action: Remove]
- Basement Bedroom 1 - Tear out wet drywall, cleanup, bag for disposal [Action: Remove]

**Customer Request:**