

Job Save & Add Copy

When a Job already exists in Restoration Manager another job can be created by using **Save & Add Copy**.

IMPORTANT: If your database has more than one Office (Division or Site) please log into all Offices if the Job will be Copied into a different Office.

Navigate to the job using your preferred search method; at the bottom of the Job Detail page click on the **Save & Add Copy** icon.

Additional Info

Property Type:

Deductible:

Policy Info:

Lockbox Code:

Gate/Gar. Code:

Pets: Yes No

Lead Test:

Completion %:

Survey Sent:

Survey Received:

Notes:



Status:

Link Documents, Correspondence, and Jobs of Multiple Jobs by searching and selecting below.

Apply changes to: Both Document and Correspondence Linked Job

Search:



Job Save & Add Copy

The page will redirect to the Add Copy page.

All the fields in blue are required and must be populated to save the record.

✕ The following icon is an expand and collapse function available within each section of the copy page.

1. Choose which Office (Division or Site) the job will be copied into. This option is only applicable if you have more than one Office (Division or Site).
2. Select the Loss Type from the drop-down.
3. The copied Job uses the Same Job ID from the copied job, and automatically applies the abbreviation when the Loss Type is selected. If abbreviations are not used it will add a 2. Otherwise you can check Custom Job ID and the Job you copied ID will display which can be edited to your preference.

Copied Job ID Example

Edited ID Example

Job #

20-0509-STM

20-0520-STM2

Custom Job #

4. Adjust the Address where the work will be performed (*if applicable*).
5. Adjust the Job progress (*if applicable*).
Note: Not recommended as the Job Progress typically aligns with the Dates applicable to the Job work flow.
6. Check the Link Documents and Correspondence box to link all Documents, Pictures and Correspondence records from the Copied Job.
7. Adjust the Date and Time of Loss (*if applicable*).
8. Adjust the Date and Time the Job was received.
9. Apply the Date and Time the Customer was contacted (*if applicable*).
10. Add Notes; such as what occurred, special instructions, etc. click the Name/Date/Time Stamp button to capture who entered the note.
Reminder: This note appears on the Job Detail page, Intuitive Mobile, ManageIT Mobile and prints on a few Reports as well such as the Preliminary Report, Production Report, etc.
11. Apply the Loss Details; such as what occurred.
Reminder: This information only appears within the Loss Detail Page and prints on the Preliminary and Job Detail Report only.
12. Check the Create WO box to create the first work order for this job (*if applicable*).
13. Adjust/change the assigned employees Estimator, Project Manager, Lead Tech, Marketing Rep, etc. (*if applicable*).
14. Click **Save** to create the new job or **Cancel** if you decided to not proceed. After clicking Save, the new lead is created and the appropriate notifications will be emailed out (*if applicable*).
 - Upon Saving the system will ensure the Job ID is unique and not used previously. If the Job ID was used previously a message will display that the Job ID is not unique, and the user will need to modify the ID to proceed.
 - If the Job ID is unique, the record will save and link the job.

Job Save & Add Copy

Add Copy of Avery Jaxson

Job ⌵

Loss ⌵

WO ⌵

Staff ⌵

1 Office:

Loss Type: 2

3 Job #: Custom Job #

Job Address: Address 1

4 Building Unit

City State

Zip

5 Job Progress:

Link Documents and Correspondence 6

7 Date of Loss:

8 Date Received:

9 Customer Contacted:

10 Notes:

11 Loss Detail:

12 Create WO

13 Project Mgr:

Estimator:

Lead Tech:

Marketing Rep:

Call Taker:

Accounting:

Email Sync:

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Reminder: To Print the Preliminary Report click the Losses tab, select the Preliminary Report from the drop-down menu and click the Print icon to generate the report.

Report Options: Email, Open in New Tab, Rotate, Download (PDF format), or Print