

Linked Jobs Overview

Linked Jobs is great way to easily switch between all associated jobs for a customer.

Job Name: Tommy Pickles Job #: 20-0501-WTR Job Progress Paid in Full - File Closed Loss Type: Water
Cause of Loss: Burst Pipe

Linked Jobs:

- 20-0501-F
- 20-0501-MLD

Tommy Pickles 904-000-0000 dbp 25475 Marsh Landing Pkwy, Ponte 32082

Tasks: 6 Incomplete: 5 Due Today: 0 Overdue: 5 Future: 0 +
Documents: 8
Correspondence: 14 +
WOs: 4 Open: 4 Due Today: 0 Overdue: 4 Review: 0 Repair: 0
Equipment: Out: 0 Returned: Total: 0

Referred By Adjuster
Adjuster Dylan Michaels (Oceanside Insurance)
Source of Referral Dylan Michaels (Oceanside Insurance)

The following Admin Settings must be setup to enable the Linked Jobs feature.

- Settings → System Setup → Settings; Other Options
 - a) Check - Job Copying links to the original Job

Other Options:

Allow job contacts to be billing contacts?
 Do not show Site Inspection Appt on the Work Description report?
 Prepend one (1) to fax numbers for the fax service?
 When adding a new job, use the City, State, Zip and County from the company?
 When quick adding a new job, use the primary and secondary contacts and full address from the company?

Job Entry Form: Quick Add New Lead
 Set Time Zone for ALL Offices: No changes to time zones. *for future dates only. It will not cha

Show Maps using maps from: Google

Unit of measure used for mapping distances: Miles Kilometers

Auto-stamp name/date/time when entering action taken?
 Auto-stamp name/date/time when entering work description?
 Auto-stamp name/date/time when a WO is scheduled for review or repair?
 Use the date received of the loss for a new wo instead of today?
 Use company contact for alternate billing contact instead of office contact?
 Job copying also copies the job contacts and additional contacts?
 Job copying links to the original job
 Use office email address for notification 'From' address?

Set Schedule Time Frame Regular 24 Hours
 Show Bread Crumbs in the Header?

- Settings → System Setup → Settings; Job ID Options
 - a) Check - Allow editing of Job ID

Job # Options:

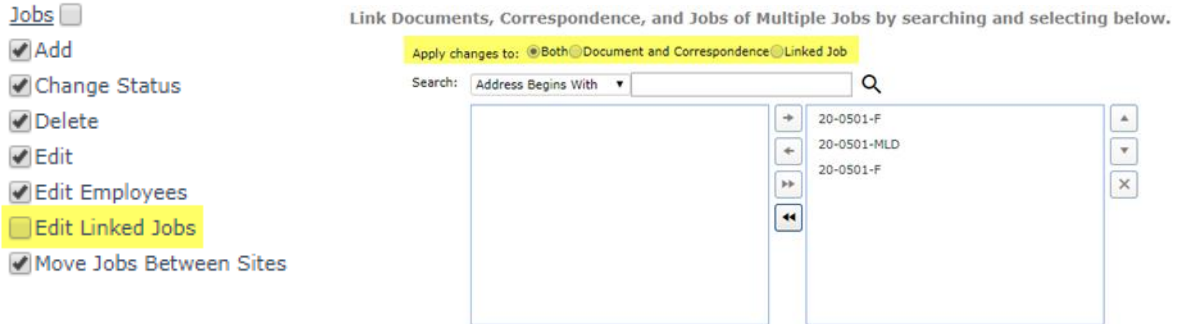
Auto-number Job #'s?

Prefix:
 No Prefix
 Use Office Code as Prefix
 Numbering: Shared System-wide Separate for Each Office
 Use Custom Prefix:
 Add current year to prefix: 2-digit year 4-digit year
 Add current month to prefix:
 Add This after prefix and before number:
 Starting number: 500 Last used: varies with office ↻
 Force: 4 number of places in number
 Reset numbering to starting number for each year
 Add loss type abbreviation as suffix during New Lead entry

When moving a job to a new office:
 Create new Job #
 Retain current Job #
 Allow editing of Job ID

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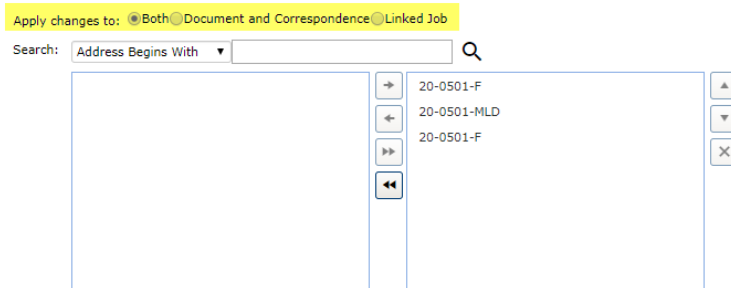
- Employee Permission Settings → System Setup → Employees → Permissions; Jobs check Edit Linked Jobs
When this permission is selected the user can Link Jobs from the Job Detail Page.



Jobs can be linked two ways.

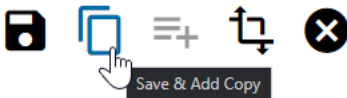
- Within the Job Detail page under Additional Info you can Search and then select how you prefer to Link the Jobs.
Radio Button Options
 - Both: Links the Job, Documents and Correspondence for selected Jobs.
 - Document and Correspondence: Links Documents and Correspondence only for the selected Jobs.
 - Linked Jobs: Links the selected Jobs only.

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



- Perform a search using the search filters and then move the Jobs to the right that you want to Link.

- Save & Add Copy located at the bottom of the Job Detail page.



For an overview on how use Save & Add Copy please refer to the following reference document available on the University.
Training Documents → CSR/Call Taker; Job Reference Documents → **Job Save & Add Copy**.