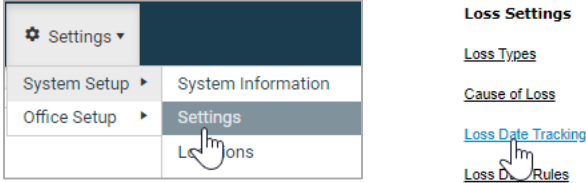


Loss Date Tracking - Setup

Loss Date Tracking tracks date changes and a reason why the date was changed will need to be applied.

To setup Loss Date Tracking go to Settings→ System Setup→ Settings→ Loss Settings, Loss Date Tracking



Check the boxes next to the date description you would like to track, no save is required on this page.

Loss Date Tracking

<input type="checkbox"/> Date of Loss	<input type="checkbox"/> Date Received
<input type="checkbox"/> Customer Contacted	<input type="checkbox"/> Site Inspection Appt Start
<input type="checkbox"/> Site Inspection Appt End	<input type="checkbox"/> Site Inspected
<input type="checkbox"/> Estimate Uploaded	<input type="checkbox"/> Estimate Approved
<input checked="" type="checkbox"/> WA/Contract Signed	<input type="checkbox"/> Target Start Date
<input checked="" type="checkbox"/> Target Completion	<input checked="" type="checkbox"/> Job Started Start
<input type="checkbox"/> Drying Started	<input type="checkbox"/> Drying Completed
<input checked="" type="checkbox"/> Job Started End	<input type="checkbox"/> Job Not Sold
<input type="checkbox"/> Job Completed	<input type="checkbox"/> Date Closed

If a date you setup to track is previously set, then revised the user will be prompted to add a reason the date was changed.

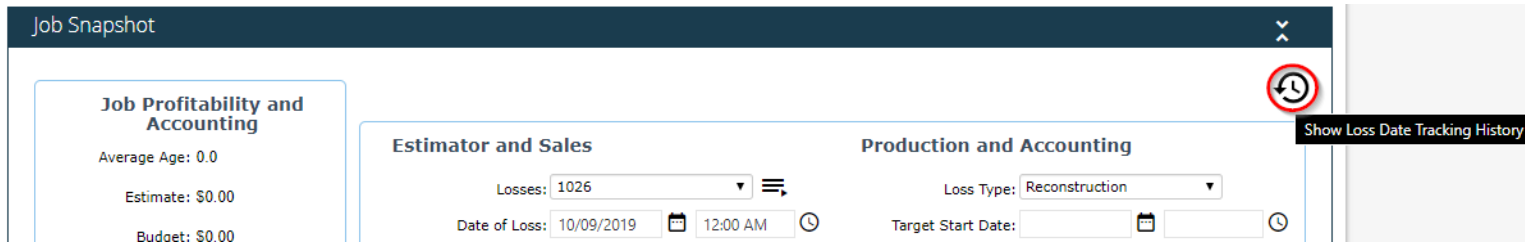
Loss Date Changed

The following dates have changed: **WA/Contract Signed**. Please provide a reason below why they have changed.

Revisions made to the Contract per the customers request and updated scope of work.



After the Loss Date Changed has been saved a history icon will display within the Job Snapshot.



Single click the history icon to display and search all date changes.

Timestamp	Employee	Date Field	Date Value	Change Reason
10/26/2019 12:19 PM	Dawn Bryant	WA/Contract Signed	10/26/2019 12:00 AM	Revisions made to the Contract per the customers request and updated scope of work.
10/21/2019 12:17 PM	Dawn Bryant	WA/Contract Signed	10/21/2019 12:00 AM	Initial