

## Job Correspondence

Correspondence is the central area where all notes associated with a job can be accessed by all employees.

There are two (2) ways to add a Correspondence note to the Job in Restoration Manager.

### Quick Add



**Braxton Lee, Policy Holder** 239-000-0000 - Cell [dbryant@verisk.com](mailto:dbryant@verisk.com)  
**Jayme Lee, Spouse** 239-111-1111 - Cell [jlee@email.com](mailto:jlee@email.com)  
 5117 Sea Bell Rd, Sanibel, FL 33957

Tasks: 4 Incomplete: 3 Due Today: 0 Overdue: 1 Future: 2 +  
 Documents: 8  
 Correspondence: 2 +  
 WOs: 5 Open: 5 Add Correspondence Review: 0 Repair: 5  
 Equipment: 0 Out: 0 Re

Referred By: Plumber  
 Adjuster: Dylan Michaels (Oceanside Insurance)  
 Source of Referral: Bryce Combs (Fix-it Up Plumbing)

Detail
Job Contacts (2)
Additional Contacts (2)
Losses (1)
Schedules
Tasks (4)
Subs/Techs
Financials\*\*
Correspondence (2)

Documents & Pics (8)
Document Merge
Inspections
Moisture Readings
Equipment
Change Log
Create WOs

Type: Type Status: Status By: Choose an Employee

Search: Subject Contains

When	Type	Subject	Initiate	With	CC	Status	Task	By	Link	Job #
04/04/2020 06:28 PM	Email	Business Development Introduction Letter from Restoration Manager	To	dbryant@verisk.com	jlee@email.com,dbryan		No	Dawn Bryant		20-0512-F
04/04/2020 05:58 PM	Email	New Lead/Job Information: Job ID 20-0512-F for Braxton Lee	To	dbryant@verisk.com			No	Dawn Bryant		20-0512-F

Type: Note Date: 04/16/2020 Time: 10:46 AM Progress: Complete

To: To With: With CC: CC

Subject: Subject

Detail:

Add Task  
 Show In Job Portal  Show In Company Portal  Show In Sub/Tech Portal

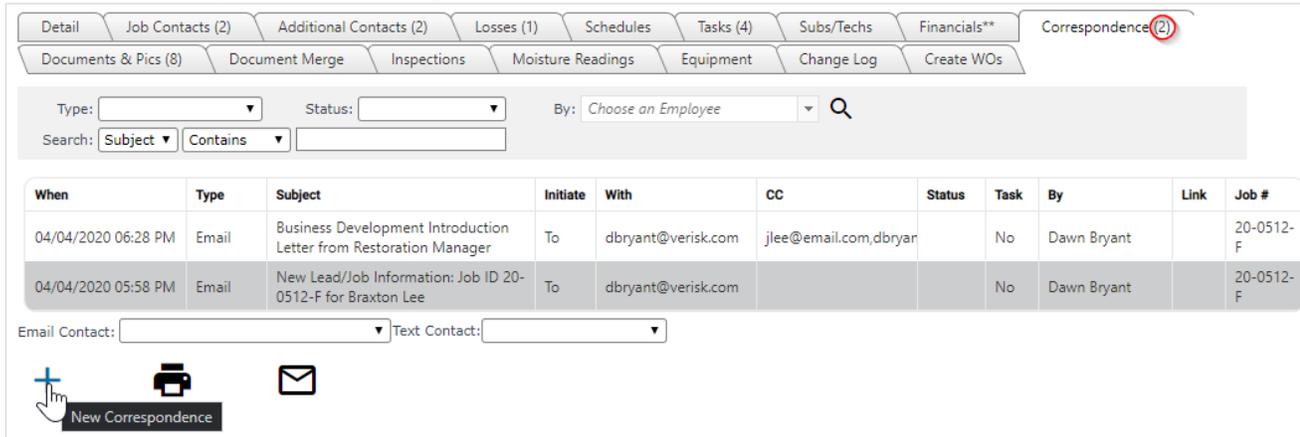
1. Click the plus sign + in the header, Correspondence opens and by default.
2. **Type** is set to **Note**, which can be changed.
3. The **Date and Time** fields default to the current date & time the record was opened.
4. Select the **Progress** from the drop down (if applicable).
5. Dropdown To/From **To** (the person the correspondence was to) or **From** (the person the correspondence was from).  
*\*appears in reports*
6. The **With** dropdown contains all contact names associated with the Job. You can select from the dropdown or type in the field. *\*searchable and appears in reports*
7. Add the **CC** contact (if applicable).
8. Add the **Subject** that best describes the correspondence you are entering (*required*). *\*searchable and appears in reports*
9. Add the **Detail** of the correspondence. *\*appears in reports*
10. When you are finished click the **Floppy Disc** icon to Add.

## Job Correspondence

### Correspondence Tab

**Note:** The number in parentheses is the total amount of Correspondence records that are associated or linked to the job.

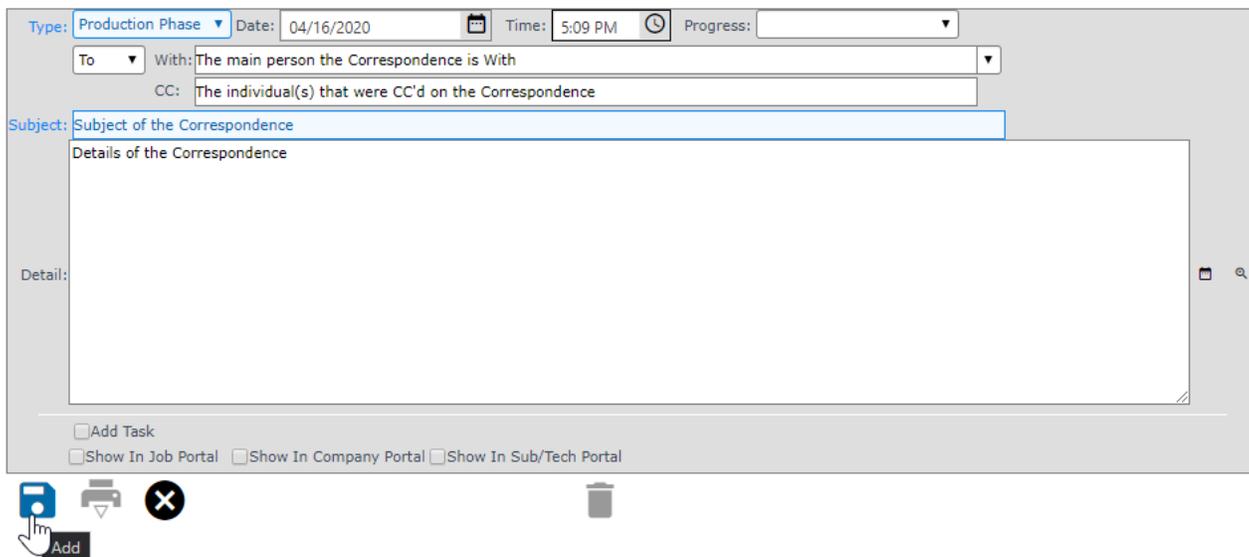
To add a new Correspondence, click the **plus** icon.



The screenshot shows the 'Correspondence (2)' tab selected. Below the navigation tabs is a search bar with fields for 'Type', 'Status', 'By', and a search icon. Below the search bar is a table with columns: When, Type, Subject, Initiate, With, CC, Status, Task, By, Link, Job #. Two records are visible:

When	Type	Subject	Initiate	With	CC	Status	Task	By	Link	Job #
04/04/2020 06:28 PM	Email	Business Development Introduction Letter from Restoration Manager	To	dbryant@verisk.com	jlee@email.com,dbryan		No	Dawn Bryant		20-0512-F
04/04/2020 05:58 PM	Email	New Lead/Job Information: Job ID 20-0512-F for Braxton Lee	To	dbryant@verisk.com			No	Dawn Bryant		20-0512-F

Below the table are fields for 'Email Contact:' and 'Text Contact:'. At the bottom left, there is a '+ New Correspondence' button with a plus icon.



The screenshot shows the 'Add' form for creating a new correspondence record. The form includes the following fields:

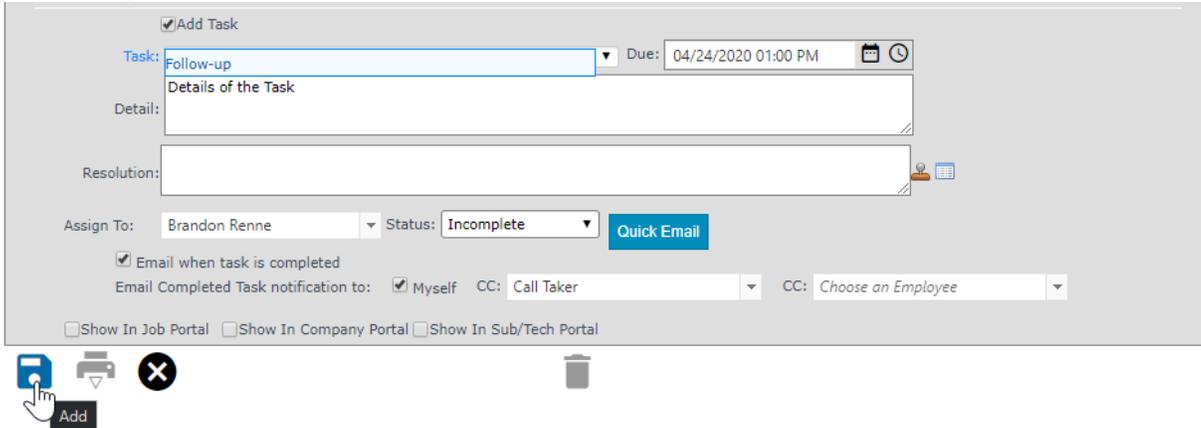
- Type:** Production Phase (dropdown)
- Date:** 04/16/2020 (calendar icon)
- Time:** 5:09 PM (clock icon)
- Progress:** (dropdown)
- To:** (dropdown)
- With:** The main person the Correspondence is With (dropdown)
- CC:** The individual(s) that were CC'd on the Correspondence (text input)
- Subject:** Subject of the Correspondence (text input)
- Detail:** Details of the Correspondence (large text area)

At the bottom of the form, there are checkboxes for 'Add Task', 'Show In Job Portal', 'Show In Company Portal', and 'Show In Sub/Tech Portal'. Below the form is an 'Add' button with a floppy disc icon.

1. Select the **Type** of Correspondence from the drop-down (*required*). *\*searchable and appears in reports*
2. The **Date and Time** fields default to the current date & time the record was opened.
3. Select the **Progress** from the drop down (*if applicable*)
4. Dropdown **To/From To** (the person the correspondence was to) or **From** (the person the correspondence was from). *\*appears in reports*
5. The **With** dropdown contains all contact names associated with the Job. You can select from the dropdown or type in the field. *\*searchable and appears in reports*
6. Add the **CC** contact (if applicable).
7. Add the **Subject** that best describes the correspondence you are entering (*required*). *\*searchable and appears in reports*
8. Add the **Detail** of the correspondence. *\*appears in reports*
9. When you are finished click the **Floppy Disc** icon to Add.

## Job Correspondence

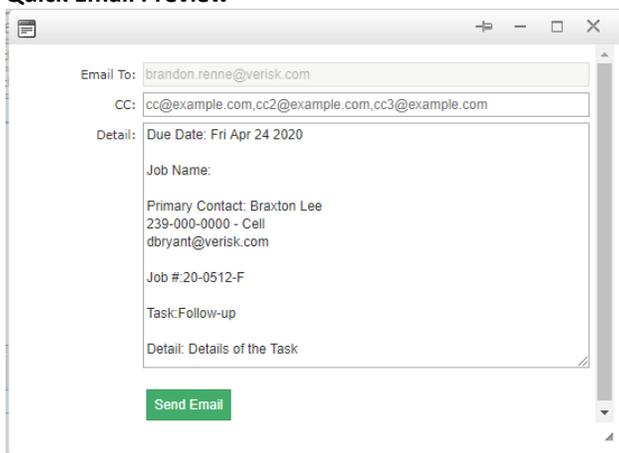
If the correspondence is unresolved and needs further resolution, check the **Add Task** box.



1. Apply the **Task** you can select from the drop-down or manually add the subject (*required*).
2. Adjust the **Date Due** by default it's the current date.
3. Add the **Detail** of the task you would like to have addressed.
4. **Assign To** field assign the Task to the person that is responsible to complete the Task. By default, this field populates the name of the person logged in. You can change the assignee by highlighting the name then begin typing who the task will be assigned to.
5. **Email when task is completed**; check this box if you would like to receive an email when the assignee has completed the Task. You can also CC two other individuals to receive the completed task email.
6. By checking **Show In Portal** this correspondence will then be viewable by the job contact when logging into the Job Portal.
7. By checking **Show In Company Portal** this correspondence is viewable by the company contact (Agent, Adjuster, etc.) when logging into the Company Portal.
8. By checking **Show In Sub/Tech Portal** this correspondence is viewable by the Subcontractor when logging into the Sub/Tech Portal.
9. **Quick Email**; click this option if you would like to Email the Task Assignee so they are aware something has been assigned to them.
10. When you are finished click the Floppy Disc icon to Add.

*Note: if you use the **Quick Email** this option will send the email add the Correspondence and the Task.*

### Quick Email Preview



## Job Correspondence

How the correspondence displays after selecting Add.

When	Type	Subject	Initiate	With	CC	Status	Task	By	Link	Job #
04/16/2020 05:09 PM	Production Phase	Subject of the Correspondence	To	The main person the Correspondence is With	The individual(s) that were CC'd on the Correspondence	Incomplete	Yes	Dawn Bryant		20-0512-F

The details of the correspondence can be viewed two (2) ways.

1. Single click the correspondence to expand and display the details.

*Note: When templates are used html is displayed within this view. When double clicking or generating a report the html is no longer displayed.*

When	Type	Subject	Initiate	With	CC	Status	Task	By	Link	Job #
04/16/2020 05:09 PM	Production Phase	Subject of the Correspondence	To	The main person the Correspondence is With	The individual(s) that were CC'd on the Correspondence	Incomplete	Yes	Dawn Bryant		20-0512-F
04/04/2020 06:28 PM	Email	Business Development Introduction Letter from Restoration Manager	To	dbryant@verisk.com	jlee@email.com,dbryan		No	Dawn Bryant		20-0512-F
04/04/2020 05:58 PM	Email	New Lead/Job Information: Job ID 20-0512-F for Braxton Lee	To	dbryant@verisk.com			No	Dawn Bryant		20-0512-F

Type: Production Phase Date: 04/16/2020 Time: 5:09 PM Progress:

To:  With: The main person the Correspondence is With

CC: The individual(s) that were CC'd on the Correspondence

Subject: Subject of the Correspondence

Details of the Correspondence

Detail:

Add Task

Show In Job Portal  Show In Company Portal  Show In Sub/Tech Portal

2. Double clicking the correspondence record the details of the correspondence in a pop-up window

Correspondence Detail - Google Chrome

Not secure | [rmtraining.restorationmanager.net/Correspondence/Corr...](http://rmtraining.restorationmanager.net/Correspondence/Corr...)

**Correspondence Detail**

**Date:** 04/04/2020

**Type:** Email

**To:** dbryant@verisk.com

**CC:** jlee@email.com,dbryant@verisk.com

**By:** Dawn Bryant

**Subject:** Business Development Introduction Letter from Restoration Manager

**Detail:**



Greetings from Restoration Manager,

I am very excited to introduce myself to you as your Restoration Manager Account Manager. I have familiarized myself with your company and understand the important role of emergency services for your business purpose. As a family owned

*Reminder: Please ensure that pop-up blockers have been allowed for Restoration Manager within the browser of your choice.*

## Job Correspondence

The correspondence search provides the ability to narrow down correspondence activities associated with a job by using any of the filters.

**Type:** Type of correspondence, **Status:** Incomplete or Complete Task, **By:** Who entered the correspondence, **Subject:** description of the correspondence, and **With:** Who the correspondence was with. Click the **magnifying glass** to proceed.

Type:  Status:  By:  

Search:

### Emailing from Correspondence

To email from correspondence single click the **Correspondence Tab**. From the **Email Contact** drop-down select the Contact you would like to send an email to.

*Note: The contact will only appear in the drop down if they are assigned to the job and have an email address associated with their contact record.*

Detail Job Contacts (2) Additional Contacts (2) Losses (1) Schedules Tasks (3) Subs/Techs Financials Correspondence (3)

Documents  Moisture Readings Equipment Change Log

Type:  By:  

Search:

When	Initiate	With	Status	Task	By	Lin
02/04/2019	To	Mimi Pinkney	Incomplet	Yes	Dawn Bryant	
02/01/2019	To	dbryant@verisk.com		No	Dawn Bryant	
02/01/2019	To	dbryant@verisk.com		No	Dawn Bryant	

Email Contact:  Text Contact:

After selecting the contact from the drop-down menu, you will be redirected to the Build Email page.

Total Attachment Size: 0KB (0MB)

**Job Information:**  
 Name: New Lounge and Display Cases, Job #: 19-113REM, Contacts: Designer Desserts - , Mimi Pinkney - dbryant@verisk.com

Show in Portal

Template:

Loss, Job, Company, Office & Business merge fields are available.

To:  Mimi Pinkney

CC:

CC (contacts):  Mimi Pinkney - Owner  
 Project Manager - Project Manager  
 Dawn Bryant - Office Manager  
 Call Taker - Customer Service Representative  
 Accounting - Accountant

Subject:   Send in Text format

Attachment(s): 

The recipients email address will appear in the **To** field and the **Subject** will default to the Job ID, Job Name applied to the Job.

1. Check **Show in Portal** if you would like this email to be viewable by the contact within the Job Portal.
2. Select a **Template** from the drop-down menu (if applicable) When an email template is selected the subject defaults to the template name and the body of the email is populated.

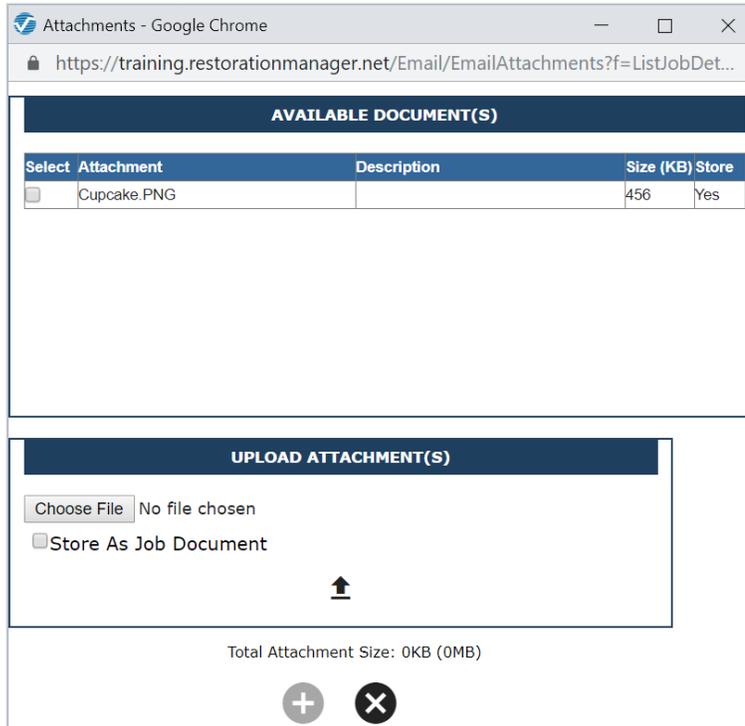
*Note: The Administrator of the application can create text templates by going to Settings → Office Setup → Email Templates. Please refer to the **Email Template – Setup** reference document on the University under **Training Documents → Administrator***

## Job Correspondence

3. The **To** field is the recipient of the email.
4. You can manually add an email address into the **CC** field. If more than one email is added the email addresses need to be separated by a semi colon or comma.
5. Within **CC (contacts)** if you would like to include the contact on the email check the box next to their name.
6. Apply the **Subject** of the email.
7. By single clicking on the **Attachments** icon you can select any documents and/or pictures that have been uploaded to the job. Or you can upload documents and/or pictures stored in a different location.  
*Note: The limitation to attaching files is 10mb*
8. Type a message within the **body of the email**; if an email template wasn't selected.
9. Selecting **Preview**, to preview the email prior to sending the page opens in a pop-up window.
10. When you are finished click **Send Message**.
11. After the email is sent the page redirects back to the Correspondence page.

### Email Attachments Usage

By single clicking on the **Attachments** icon you can select any documents and/or pictures that have been uploaded to the job. Or you can upload documents and/or pictures stored in a different location.



The screenshot shows a browser window titled "Attachments - Google Chrome" with the URL "https://training.restorationmanager.net/Email/EmailAttachments?f=ListJobDet...". The main content area is divided into two sections:

**AVAILABLE DOCUMENT(S)**

Select	Attachment	Description	Size (KB)	Store
<input type="checkbox"/>	Cupcake.PNG		456	Yes

**UPLOAD ATTACHMENT(S)**

Choose File No file chosen

Store As Job Document

↑

Total Attachment Size: 0KB (0MB)

+

×

To upload a document and/or picture stored in a different location select "Choose File" browse to where the file is stored, select the file you want to attach to the email.

1. **Select Attachment**; check the box next to the Document and/or Picture that you would like to attach to the email.
2. **Upload Attachments**; click the Choose Files button to a Document and/or Picture stored on your PC.
  - a. Check **Store As Job Document** if you would like the document and/ or pictures to be uploaded to Documents & Pictures on the job.
    - The pop-up will expand and display Title, Description and Viewable by Job Contact. Title & Description are required. Only check Viewable by Job Contact if you would like this document to viewable in the Job Portal.
    - When you are finished select **Upload** files.
    - Click **Attach files to email** to proceed.
  - b. If the documents and/or pictures will not be needed as a job reference in the future then just click **Attach files to email** to proceed.



## Job Correspondence

### Email Templates

Select the Template from the drop-down menu

Total Attachment Size: 0KB (0MB)

**Build Email**

**Job Information:**  
Name: New Lounge and Display Cases, Job #: 19-113REM, Contacts: Designer Desserts - , Mimi Pinkney - dbryant@verisk.com

Show in Portal

**Template:** [Dropdown menu showing: [Job ID], Customer Progress Update: [Primary Contact Full Name] - [List Type]

**To:** [Job ID], Estimate Completed Update - [Address Full]

**CC (contacts):** [Job ID], Job Completed TESTING THE DATE: [Primary Contact Full Name] - [List Type]  
[Job ID], Request Invoicing  
[Primary Contact Full Name] Letter for Pre-Completion of Work at Job ID: [Job ID]

**Subject:** [Vendor Name] Work Order \*\*\*SCHEDULED REMINDER\*\*\*

**Attachment(s):** [Vendor Name] Work Order \*\*\*SCHEDULED\*\*\*  
1800 Packrat Information for [Primary Contact Full Name] Job ID: [Job ID]  
Adjuster Progress Report for [Primary Contact Full Name] Job ID: [Job ID]

Send in Text format

\*In addition to CC

[Current Date]

[Primary Contact First Name] [Primary Contact Last Name]  
[Address Line 1]  
[Address City], [Address State] [Address Zip]

Dear [Primary Contact First Name],

It is our goal to keep you involved and informed during the course of your job as it is progressing forward. The following is an update of our progress as of [Current Date]:

**WHEN REPLYING TO THIS EMAIL PLEASE ENSURE YOU SELECT REPLY ALL, THANK YOU!**

**Summary of This Week's Accomplishments:**

**Goals for the Upcoming Week:**

**Important Reminders:**

**Other Notes:**

We value your business and appreciate the opportunity to service your job. As always, please do not hesitate to contact us directly with any questions or concerns that you may have at this time.

Thank you,

**Restoration Manager**  
7991 Shaffer Parkway, Suite 300  
Littleton, CO 80127  
Office: 303-800-5182  
www.restorationmanager.net

Before sending the email, it can be previewed and checked for accuracy by selecting **Preview** at the bottom of the page.



When selecting the **Preview**, the page opens in a pop-up window and all the merge fields are populated.

**Reminder:** Please ensure that pop-up blockers have been allowed for Restoration Manager within the browser of your choice.

## Job Correspondence

### Example of Preview Pop-up

Attachments - Google Chrome  
 https://training.restorationmanager.net/Email/EmailPreview

**Subject:** 19-113REM, Customer Progress Update: Designer Desserts - Remodeling

02/04/2019

Designer Desserts  
 426 1st Street  
 Jax Beach, FL 32250

Dear ,

It is our goal to keep you involved and informed during the course of your job as it is progressing forward. The following is an update of our progress as of 02/04/2019:  
**WHEN REPLYING TO THIS EMAIL PLEASE ENSURE YOU SELECT REPLY ALL, THANK YOU!**

**Summary of This Week's Accomplishments:**

### Sending a Text from Correspondence

To send a Text from correspondence click on the **Correspondence Tab**. Select the contact you from the **Text Contact** drop-down menu.

*Note: The contact will only appear in the drop down if the SMS/Text is associated with their contact record.*

Detail | Job Contacts (2) | Additional Contacts (2) | Losses (1) | Schedules | Tasks (3) | Subs/Techs | Financials | Correspondence (3)

Documents & Pics (3) | Document Merge | Inspections | Moisture Readings | Equipment | Change Log

Type:  Status:  By: Choose an Employee

Search: Subject  Contains

When	Type	Subject	Initiate	With	Status	Task	By	Link	Job #
02/04/2019 02:00 PM	Production Phase	Lounge Plans	To	Mimi Pinkney	Incomplete	Yes	Dawn Bryant		19-113REM
02/01/2019 02:19 PM	Email	WA/Contract Signed: Designer Desserts - Remodeling - 19-113REM	To	dbryant@verisk.com		No	Dawn Bryant		19-113REM
02/01/2019 02:18 PM	Email	New Lead/Job Information: Job ID 19-113REM for Designer Desserts	To	dbryant@verisk.com		No	Dawn Bryant		19-113REM

Email Contact:  Text Contact:

+  

Mimi Pinkney - Owner  
 Dawn Bryant - Office Manager



## Job Correspondence

After selecting the contact, the following Send SMS pop-up will display.

**Send SMS**

Job, Company, Office & Business related merge fields are available.

To: 2199736812

Text Template: Arriving Soon ▼

Message: 

Hi , Mimi our crew is on the way and should be arriving within 30 minutes.  
 \*\*THIS IS A RECEIVE ONLY TEXT - DO NOT REPLY\*\* QUESTIONS  
 PLEASE CALL 303-800-5182 OR EMAIL  
 RESTORATION@VERISK.COM. THANK YOU!  
 (320 character maximum - might split into multiple text messages)

➤

1. **To;** displays the recipient’s mobile number.
2. Select a **Text Template** from the drop-down. *(if applicable)*  
*Note: The Administrator of the application can create text templates by going to Settings→ Office Setup→ Text Templates. Please refer to the **Text Template – Setup** reference document on the University under **Training Documents → Administrator***
3. Manually apply your **Message**.
4. When you are finished click **Send**.

### How the correspondence displays after the Text is sent

When	Type	Subject	Initiate	With	Status	Task	By	Link	Job #
02/05/2019 01:36 AM	Text	Text Message Sent	To	Mimi Pinkney (2199736812@messaging.:		No	Dawn Bryant		19-113REM