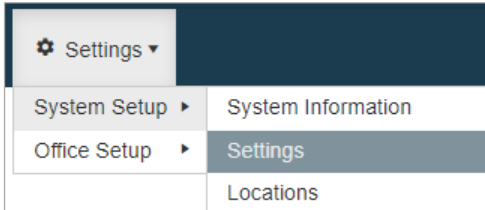


Loss Date Rules - Setup

When Loss Date Rules are setup this will prevent certain dates from being entered before a previous date. As well as setting up which Job Progress ties to what date fields. You'll also be able to define which Job Progresses equal a Compliance Progress.

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



Loss Settings

[Loss Types](#)

[Cause of Loss](#)

[Loss Date Tracking](#)

[Loss Date Rules](#)

Check Enable Loss Date Rules to expand the page.

Loss Date Rules

Enable Loss Date Rules

Loss Date Rules

Enable Loss Date Rules

Date	Dependent On	Read Only After Entry	Job Progress	Compliance Progress?	
Job Creation		<input type="checkbox"/>	None	<input type="checkbox"/>	
Date of Loss		<input type="checkbox"/>	New Lead/Job	<input type="checkbox"/>	
Date Received	Date of Loss	<input checked="" type="checkbox"/>	New Lead/Job	<input type="checkbox"/>	
Customer Contacted	Date Received	<input checked="" type="checkbox"/>	Customer Contacted	<input checked="" type="checkbox"/>	
Site Inspection Appt		<input type="checkbox"/>	Site Inspection Scheduled	<input type="checkbox"/>	
Site Inspected	Site Inspection Appt	<input type="checkbox"/>	Site Inspected	<input checked="" type="checkbox"/>	
Estimate Complete		<input type="checkbox"/>	Estimate Complete & Submitted	<input checked="" type="checkbox"/>	
Estimate Approved		<input type="checkbox"/>	Estimate Approved	<input type="checkbox"/>	
WA/Contract Signed	Site Inspected	<input type="checkbox"/>	WA/Contract Signed	<input checked="" type="checkbox"/>	
Target Start Date		<input type="checkbox"/>	None	<input type="checkbox"/>	
Target Completion		<input type="checkbox"/>	In Production	<input checked="" type="checkbox"/>	
Job Started	WA/Contract Signed	<input type="checkbox"/>	In Production	<input checked="" type="checkbox"/>	
Drying Started	Job Started	<input type="checkbox"/>	In Production	<input type="checkbox"/>	
Drying Completed	Job Started	<input type="checkbox"/>	In Production	<input type="checkbox"/>	
Job Not Sold		<input type="checkbox"/>	Job Not Sold	<input type="checkbox"/>	
Job Completed	Job Started	<input type="checkbox"/>	Job Completed	<input checked="" type="checkbox"/>	
Date Closed	Job Completed	<input type="checkbox"/>	Paid in Full - File Closed	<input checked="" type="checkbox"/>	

To complete the Loss Date Rules setup follow the steps below.

1. Click the edit icon to setup/edit the date rules.

Date	Dependent On	Read Only After Entry	Job Progress	Compliance Progress?	
Job Creation		<input type="checkbox"/>	None	<input type="checkbox"/>	
Date of Loss		<input type="checkbox"/>	New Lead/Job	<input type="checkbox"/>	
Date Received	Date of Loss	<input checked="" type="checkbox"/>	New Lead/Job	<input type="checkbox"/>	

Loss Date Rules - Setup

2. After selecting the edit icon you can apply the following options.
 - a) **Dependent On:** Select the dependent on date from the dropdown. By making this selection it will prevent the date being entered previous to the dependent date.
 - b) **Read Only After Entry:** By checking this box the date field will be read only after entry.
 - c) **Job Progress:** Select the Job Progress from the dropdown. The Job Progress *must* be applied if this date is also going to be checked as Compliance Progress.
Also, by making this selection the Job Progress Summary panel on the Dashboard will have a subgrid that can be expanded to display key information.
 - d) **Compliance Progress:** By checking this box and having a Job Progress applied, this date block will display on the Job within the Compliance Progress Bar.
 - e) Click the **Save** icon (💾)

Edit: WA/Contract Signed ×

Dependent On Site Inspected ▼

Read Only After Entry

Job Progress WA/Contract Signed ▼

Compliance Progress?

💾 ✕

Once the dependent on date rules have been setup within the Job Snapshot page you'll notice any date dependent on another date the Calander and Time icons are grey.

Job Snapshot ⌵

Job Profitability and Accounting

Average Age: 0.0

Estimate: \$0.00

Budget: \$0.00

Total Costs: \$0.00

Gross Profit: \$0.00

GP%:

Over/Under Budget: \$0.00

Invoiced: \$0.00

Payment Rcvd: \$0.00

Unpaid Balance: \$0.00

% Complete: 0%

Estimator and Sales

Losses: 1102 ☰

Date of Loss: 03/26/2021 📅 6:32 PM 🕒

Date Received: 03/26/2021 📅 6:32 PM 🕒

Customer Contacted: 03/26/2021 📅 6:32 PM 🕒

Site Inspection Appt: 📅 🕒

End: 📅 🕒

By: Dawn Bryant ▼

Site Inspected: 📅 🕒

Estimate Complete: 📅

Estimate Approved: 📅

WA/Contract Signed: 📅

✕ Send Job to Xactimate®

XA TRANS ID#:

Progress: Customer Contacted ▼

💾 ✕

Production and Accounting

Loss Type: Water ▼

Cause of Loss: Sewer Back-up ▼

Target Start Date: 📅 🕒

Target Completion: 📅 🕒

Job Started: 📅 🕒

End: 📅 🕒

Drying Started: 📅 🕒

Drying Completed: 📅 🕒

Job Completed: 📅 🕒

Date Closed: 📅 🕒

Job Not Sold: 📅

Loss Date Rules - Setup

Loss Date Rules Example:

- Customer Contacted: Loss Date Rule, Read Only - after the Customer Contacted date/time was entered and the snapshot was saved the field is greyed out and unable to be edited.
- WA/Contract Signed: Loss Date Rule, dependent on Site Inspected - hovering over the calendar icon displays the rule message.

Job Snapshot ⌵

Job Profitability and Accounting

Average Age: 0.0

Estimate: \$0.00

Budget: \$0.00

Total Costs: \$0.00

Gross Profit: \$0.00

GP%:

Over/Under Budget: \$0.00

Invoiced: \$0.00

Payment Rcvd: \$0.00

Unpaid Balance: \$0.00

% Complete: 0%

Estimator and Sales

Losses: 1102 ⌵

Date of Loss: 03/26/2021 6:32 PM 📅 ⌚

Date Received: 03/26/2021 6:32 PM 📅 ⌚

Customer Contacted: 03/26/2021 6:32 PM 📅 ⌚

Site Inspection Appt: 03/26/2021 7:00 PM 📅 ⌚

End: 03/26/2021 8:00 PM 📅 ⌚

By: Dawn Bryant ⌵

Site Inspected: 📅 ⌚

Estimate Complete: 📅

Estimate Approved: 📅

WA/Contract Signed: 📅

Production and Accounting

Loss Type: Water ⌵

Cause of Loss: Sewer Back-up ⌵

Target Start Date: 📅 ⌚

Target Completion: 📅 ⌚

Job Started: 📅 ⌚

End: 📅 ⌚

Drying Started: 📅 ⌚

Drying Completed: 📅 ⌚

Job Completed: 📅

Date Closed: 📅

Job Not Sold: 📅

This date cannot be set until Site Inspected is set.

XA TRANS ID #:

Progress: Site Inspection Scheduled ⌵

📄
✕

Compliance Progress Bar Example:

The number within the progress block is related to dates and compliance tasks associated to the progress.

Note: The Task count is not applicable to manually entered Tasks or Task Template Tasks.

If there are Compliance Tasks associated with the progress block the block will display the color of the Task Accountability such as Yellow for Due Today, Green for due in the Future and Red for Overdue. The checkmark will not display within the progress block until everything is complete (Dates & Compliance Tasks).

Compliance Progress ⌵

✓
 New Lead/Job

✓
 Customer Contacted

✓
 Site Inspected

✓
 Estimate Complete & Submitted

✓
 WA/Contract Signed

2
 In Production

1
 Job Completed

1
 Paid in Full - File Closed

Important: The Compliance Progress bar will only display within the Job if the feature is turned on. The administrator can turn this feature on by going to Settings → System Setup → Settings → Other Options, Show Compliance Requirements. The administrator will also need to complete the setup within Loss Date Rules please refer back to page 1, #1 and page 2, #2. c & d

Note: If Page 2 c & d are not setup the Compliance Progress will display on the Job with no information within it.

Please refer to the Job Compliance Progress – Setup reference document on the University under Training Documents → Administrator



Loss Date Rules - Setup

Dashboard Home and Job Panels: Job Progress Summary

By setting up the Loss Date Rules, Job Progress the Job Progress Summary panel will display the subgrid when expanded you'll see a further breakdown of My Jobs and All Jobs. When expanded the Dates that were applied to a Job Progress within the Loss Date Rules grid will display broken down by My Jobs and All Jobs.

*Example: Within **My Jobs** column 3 are in Production out of those 3 Jobs 2 have Target Completion date applied, 3 have Job Started date applied and none of these Jobs have Drying Started or Drying Completed dates applied.*

Job Progress	My Jobs	All Jobs
▶ New Lead/Job	8	72
▶ Customer Contacted	11	88
▶ Site Inspection Scheduled	3	4
▶ Site Inspected	1	20
▶ Estimate Complete & Submitted	2	9
▶ Estimate Approved	0	1
▶ WA/Contract Signed	1	9
▶ In Production	3	12
▶ KPI Dates	My Jobs	All Jobs
▶ Target Completion	2	4
▶ Job Started Start	3	10
▶ Drying Started	0	2
▶ Drying Completed	0	2
▶ Job/Work on Hold	0	1
▶ Job Completed	3	4
▶ Invoiced	1	3
▶ Collections/Legal	0	0
▶ Paid In Full - File Closed	0	1
▶ Warranty Agreement	0	0
▶ Job Not Sold	0	3