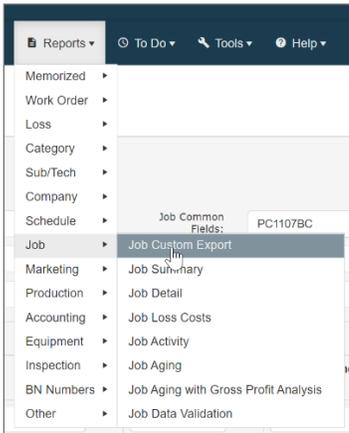


Job Custom Export - Overview

This documentation will provide the user the ability to create a Job Custom Export. This specific report is a Data Export only to be utilized within Excel.

Go to Reports on the main toolbar, Reports→ Jobs→ Job Custom Export



This will then open the Job Custom Report criteria screen.

Job Custom Export

Job Status: Active Inactive Include All

Company:

Address:

Estimator:
 Dawn Bryant
 Jay Franklin
 Lisa Paris

Supervisor:
 Dawn Bryant
 Jay Franklin
 Lisa Paris

CSR/Call Taker:
 Dawn Bryant
 Jay Franklin
 Lisa Paris

Marketing Rep:
 Dawn Bryant
 Jay Franklin
 Lisa Paris

Loss Type:
 Board-Up
 Burglary/Vandalism
 Contents

Job Progress:
 Customer Contacted
 Site Inspection Scheduled
 Site Inspected

Date:

Estimates:

Output: Data Export

Columns:
 Accountant
 Actual Exp.
 Actual Exp. % of Budget
 Actual Exp. to Budget
 Actual Exp. to Budget %
 Address 1
 Address 2
 Adjuster
 <<New Memorized Report>>

Memorized Reports:

Share with Everyone Show in Menu

*Ctrl-Click to select multiple items in the list

Job Custom Export - Overview

The user will select the criteria that is to be included in the created report.

Job Status:

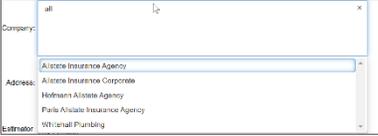
The user may opt to include only 'Active, Inactive or All' by selecting the correct radio button.

Job Custom Export

Job Status: Active Inactive Include All

Selection Boxes:

- Company – the user may opt to selection specific companies to be included in the report. To include companies the user will click within the box and begin entering in the Company name. The system will provide the user with the companies that include that criteria, whether criteria matches the beginning, middle or end of the company name. The user will select the companies from the dropdown provided by the system.

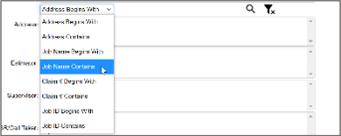
a. 

b. 

- Job Search Engine – the user may opt to search for specific jobs to be included in the report. This search engine provides the user with multiple search capabilities. Once the user has selected the optimal search criteria and input this information into the search engine, the user will click on the 'Show' icon . The system will gather all jobs that meet these criteria. The user may then select the job/s to be included in the report, selecting none of the items in the box will instruct Restoration Manager to include all. Highlighting selected items in the box will instruct Restoration Manager to only include the highlighted items in the report.

**Note: To include multiple selections the user will choose the CTRL-Click function.*

To clear the search engine the user will click on the 'Clear' icon .

a. 

b. 

c. 

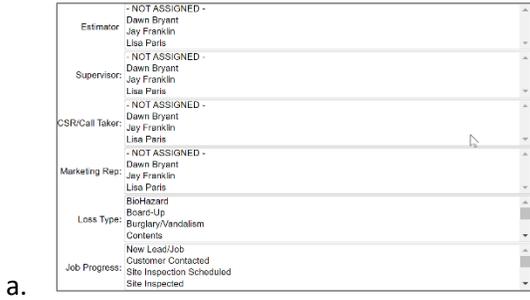


Job Custom Export - Overview

3. The user will select the criteria in each box that is to be included in the report.

**Note: To include multiple selections the user will choose the CTRL-Click function.*

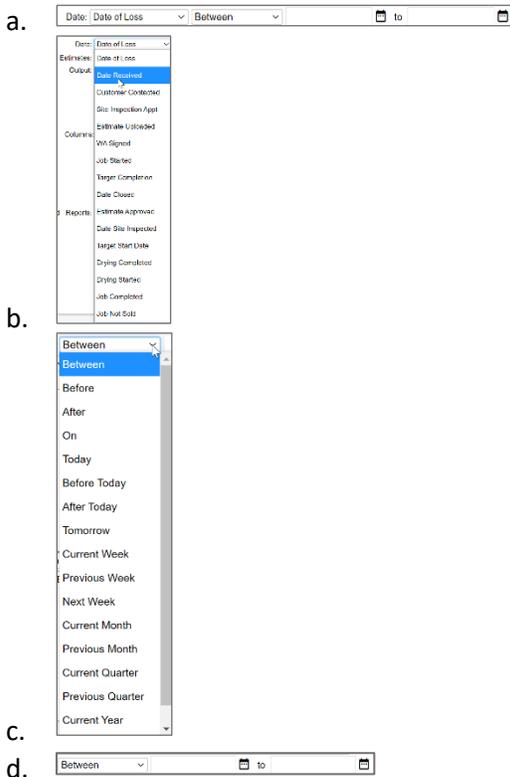
Selecting none of the items in the box will instruct Restoration Manager to include all. Highlighting selected items in the box will instruct Restoration Manager to only include the highlighted items in the report.



Date:

1. The user may select a specific date frame for the report to be populated. This date selection has a dropdown to select a labeled date within the Job Snapshot.

**Note: The labels of these date fields may vary depending upon your Administrators adjustments. The Administrator may create and manage these date field labels, (must be in one office only) go to Settings→ Office Setup→ Terminology.*

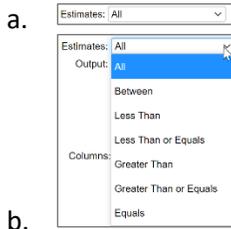




Job Custom Export - Overview

Estimates:

The user may select estimates to be included in the report. This provides the user with a dropdown for the estimate criteria selection.



Output:

This is a Data Export Report only, no other options provided.



Columns:

1. This provides the user with the ability to select multiple items to be included in the report. These items are fields within the jobs that can and may be used to collect data. Only items that have been moved to the right-hand box will be included in the report criteria.

**Note: To include multiple selections the user will choose the CTRL-Click function.*

Once the items are selected by the user, the user may manipulate the column of the export that they will appear.

**Note: The labels of these fields may vary depending upon your Administrators adjustments. The Administrator may create and manage these field labels, (must be in one office only) go to Settings→ Office Setup→ Terminology.*

