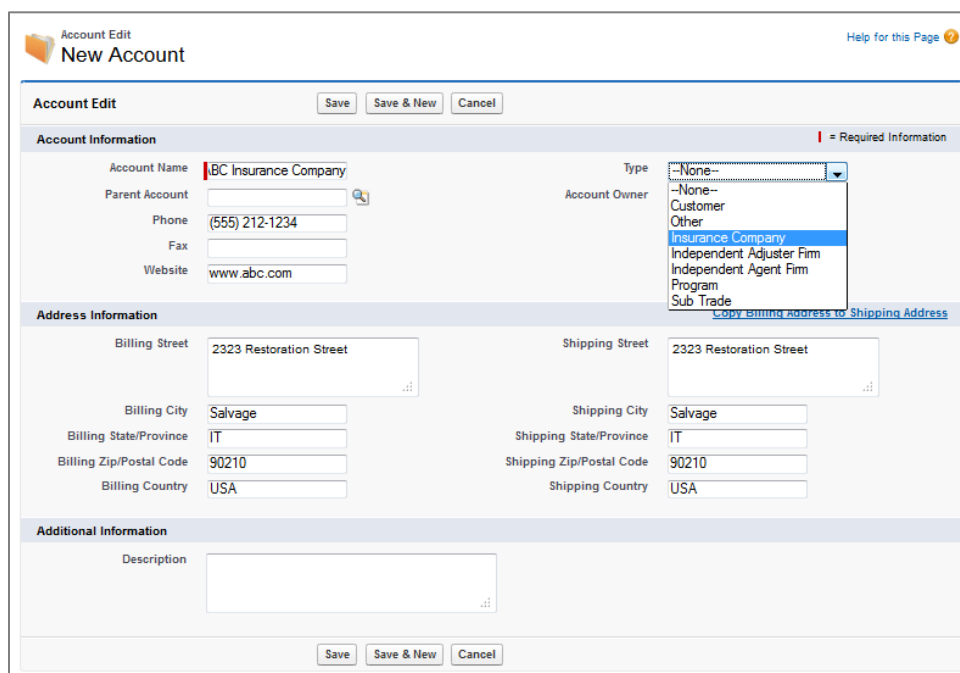


How To: Add an Account

This tutorial will demonstrate how to manually add an account to the system. Accounts represent the company that you are doing business with.



1. Log in to JobCheck Web Desktop as any user.
2. Click on *Accounts* from the primary navigation bar.
3. Click “*New Account*”.
 - a. Enter the account name (the name of the insurance company, agent/adjuster firm, program or sub trade).
 - b. Choose the *type* of account that is being added.
 - c. Enter contact information and address information.



4. Click “*Save*”.
5. If you would like to add contacts associated to this account, open the account and click “*New Contact*”.

The account will now be available from your mobile contact list and can be associated with new jobs in the job detail page. Open the account to see the full account detail, including if this account is currently assigned to a job, as well as historical job assignment.