

Create Accounts and Contacts within a Job

This tutorial will describe the difference between an account and a contact in JobCheck and explain the types of accounts and contacts that can be created on the details page of a new job.

Detail	Financial	Work Orders	Tasks	Photos	Notes	Attachments	Reports
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1. Login to the JobCheck Web Desktop as any user.
2. Click on “New Job” from the dashboard. The job detail page will open where you can enter the first notice of loss; this will include associating or creating a variety of accounts and contacts.

What is the difference between an Account and a Contact?

What is an Account?


An account in JobCheck is most typically a business entity or enterprise that you conduct business with such as an **insurance company, adjusting firm, agent firm or sub trade**; however, an account can also be a **customer account** (i.e. the **policyholder or insured**).

What is a Contact?

A contact is an individual who works for or represents a business entity (account) such as an **adjuster, agent, sub trade laborer** or the **main contact for the customer account (policyholder/insured)**. At times, creating a main contact for the customer account may seem redundant because the same information may have already been entered for the *customer account*. In the scenario where the policyholder and the main contact are the same person, the *main contact* can be created with only a name, email address and mobile number (if applicable).


How to Enter Accounts and Contacts in the Job Detail Section

There are four lookups where a new account/contact can be created in the *Job Detail* section. Use the magnifying glass to search existing accounts or *create new* if it is a new account.

Account lookups  include a smart search which will only show appropriate or related results for the intended use of that account field.

- ❖ For example, the **insurance company** lookup will only return results for accounts that have the ‘insurance company’ type and will not show ‘adjusters’, and the **adjuster** lookup will only show results for contacts that are associated to the chosen insurance company or firm.



Be sure to always search using the lookup function  when associating an account/contact. If the account/contact is pre-existing, creating a new account in the lookup will result in a duplicate account.



Job Detail → Customer Information:

- **Customer Account:** This is the ‘business entity’ whom you will be billing for the work. This will usually be the policyholder/insured, but can sometimes be a property management company. This will also be the billing account that will be created in QuickBooks when a job is sent to QuickBooks using the accounting transfer.
- **Main Contact:** This is the policyholder representative or person whom you will contact regarding this claim/job.

Job Detail → Lead Information:

- **Source:** Define if the work came from a program or a referral.
- **Program Account:** This is the ‘business entity’ program that distributed the work to you.
- **Referral Account:** This is the ‘business entity’ account that referred the work to you.
- **Referral Contact:** This is the person at the business account who sent the referral.

Job Detail Edit			
Job Number Type of Job	2-2014-05-WTR2 Restoration	Office Admin Project Manager Estimator Accountant	Laura Dombrosky Laura Dombrosky
Customer Information			
Customer Account Customer Phone Main Contact Main Contact Phone First Contacted	Dunbar, Sammy (222) 555-1234 Sam Dunbar 07/05/2014 8:00 AM	Billing Street Billing City Billing Country Billing State/Province Billing Zip/Postal Code	1234 SunnyVale lane Turnip USA CA 90210
Loss Information			
Loss Occurred Type of Loss Cause of Loss Loss Description	06/05/2014 8:54 AM Water Flood Creek in the backyard overflowed due to runoff and flooded basement and ground level	Loss Street Town/City Country State/Province Zip/Postal Code	1234 SunnyVale lane Turnip USA CA 90210
Immediate Concerns			
Is Water Available? Is Electricity Available? Source of Loss Stopped?	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Is There Visible Mold? Is Hardwood Affected? Emergency Board-Up Required?	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
Lead Information			
Source Program Account	Program HSG CodeBlue		

Figure 1 Example of a completed job detail panel.

Policy Information

There are another six account/contact lookups in the *Policy Information* section, where a new account/contact can be searched or created.

- **Insurance Company:** This account lookup will only search account types for *Insurance Company*.
- **Adjuster:** Only adjuster contacts that work for the selected insurance company will be visible in the search results.
- **Independent Adjuster Firm:** This account lookup will only search account types for *Independent Adjuster Firms*.
- **<Independent> Adjuster:** Only adjuster contacts that work for the selected independent adjuster firm will be visible in the search results.
- **Independent Agent Firm:** This account lookup will only search account types for *Independent Agent Firms*.
- **<Independent> Agent:** Only agent contacts that work for the selected independent agent firm will be visible in the search results.

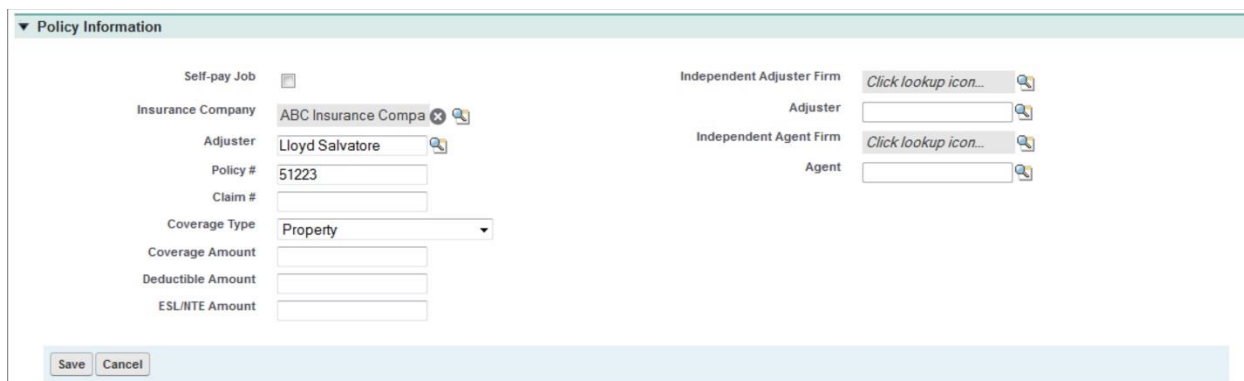


Figure 2 Example of a completed policy information panel.

If you still have questions or concerns about creating accounts or contacts, please contact us in support at 1-877-277-9933.