Orientation: Job Page Overview

This tutorial will describe how to navigate the job page in Assured JobCheck and will detail how each of the tabs pertain when managing your jobs.

Navigation

The job page can be accessed by opening any job from the dashboard in the *Home* tab located in the primary navigation (*Figure 1*). Once the job is open, all aspects of the job can be managed from the web desktop using the secondary navigation bar (*Figure 2*).

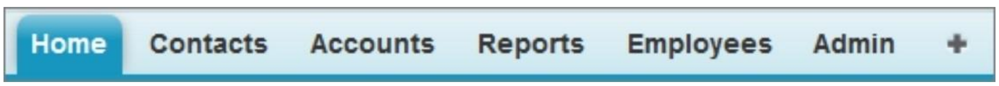


Figure 1 Primary Navigation Bar – Global

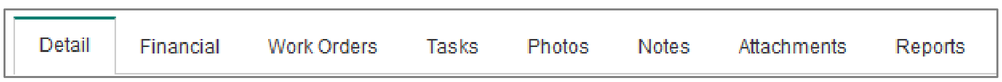


Figure 2 Secondary Navigation Bar – Within the Job

Job Page Interface

Whether starting a new job or opening an existing job, you will be directed to the main job screen (*Figure 3*). From the main job screen, you can see your job progress at a glance and manage all aspects of the job by navigating using the secondary navigation bar.

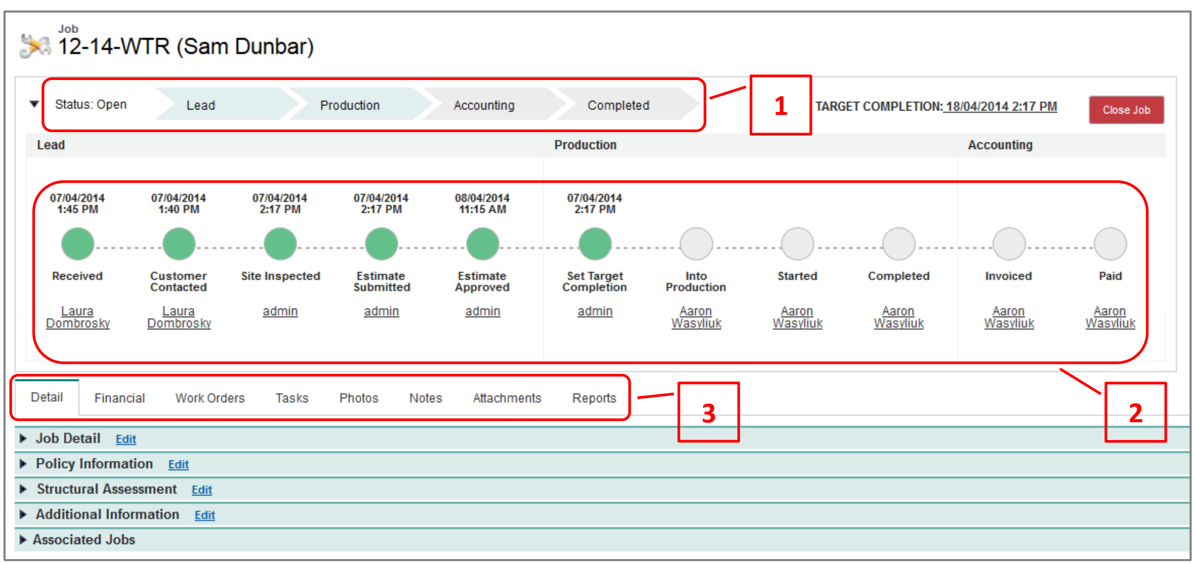
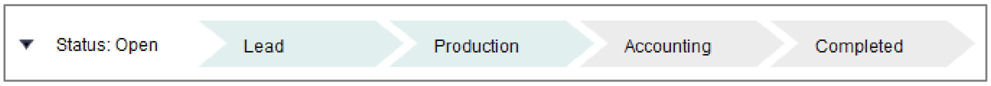


Figure 3 Main Job Screen – Within the Job

As shown in *Figure 3*, some of the tools available to help you manage your job include the job stage banner (1), milestone banner (2), and secondary navigation bar (3).

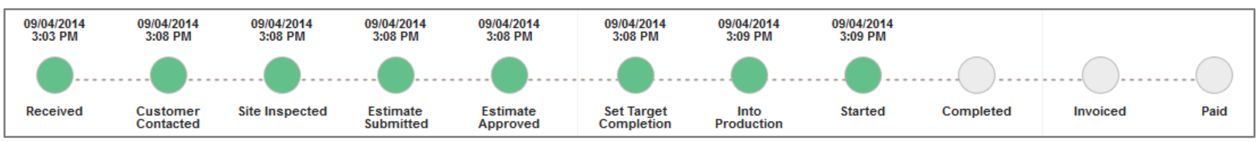
Job Stage Banner



This banner indicates the current stage of a job based on the completion of milestones. When certain milestones are completed, the banner updates to show that the job has moved to the next stage.

Lead	A job begins in the *lead* stage and remains a lead until the target completion date has been set. At this stage, the admin and estimator are responsible to move this job to the stage of *production*.
Production	Indicates that the target completion date has been set. At this stage, the project manager is responsible for ensuring that all work for the job is assigned and completed before handing off to *accounting*.
Accounting	Indicates that all work orders have been completed and the milestone for *completed* has been selected. Now the accountant will be responsible for taking this job to completion.
Completed	Once payment for the job has been received, the milestone paid can be selected and this job will attain the status of completed and can then be closed.

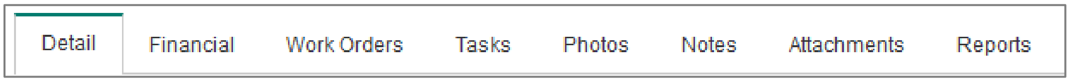
Milestone Banner



The milestone banner is a tool to help the project manager see detail about the stage of a job in progress. The milestone banner is meant to be updated as each milestone is completed so as to empower the project manager to know who is responsible for taking the job to the next stage and ensure that the job remains on schedule per the target completion date.

Received	When a new job is started, this milestone is automatically selected.
Customer Contacted	This milestone is connected to the first contacted date in the job detail and will become selected automatically when the first contacted date is entered.
Site Inspected	Must be manually selected once the site inspection/walk-thru has been completed.
Estimate Submitted	Selected by the estimator once the estimate has been created and submitted.
Estimate Approved	To be selected once the estimate has been and received back as approved. At this point, if the estimate is not approved, the job can be closed and the milestone left as *estimate submitted*.
Set Target Completion	This date should be set as soon as the estimated date of completion is known; setting the target completion date will auto-select the milestone as completed, it will also move the job from status of *lead* into *production*.
Into Production	Indicates that the job has now changed hands from the estimator to the project manager. Now that the estimate has been approved and entered, a financial plan can be created with a budget for the job and work orders can be created and assigned.
Started	This indicates that work orders have been issued and that resources have started work on the job.
Completed	Indicates that all work orders and tasks have been completed for the job and that the progress of the job will be turned over to the accountant. Job status will read *accounting*.
Invoiced	Can be completed once the job has been invoiced and is awaiting payment.
Paid	Once payment has been received this milestone can be completed and the job will change from *accounting* status to *completed*.

Secondary Navigation Bar – Job Navigation



Detail

Role: Office Admin or Front Desk

Collect first notice of loss (FNOL) information upon receipt of a new job – job details are accessible on the mobile app.

- Capture customer, loss, policy and structural information.
- Associate jobs.
- Assign user roles to take the lead as office admin, project manager, estimator or accountant on the job – these users will be responsible for completing specified milestones.

Financial

Role: Estimator or Project Manager

Create a financial plan and track job costing. This will often be populated following the site inspection and estimate approval.

- Create a work order from a budgeted category of work.
- Create a budget for categories of work to be completed and specify a desired gross margin (GM).
- Send the job to QuickBooks and import revenue/expenses for job costing comparison.

Work Orders

Role: Project Manager

View the current status of work orders open on the job, and see all work orders in a list.

- Assign work orders to a project lead.
- Create new work orders.
- Modify existing work orders.
- Schedule work orders and assign resources.

Tasks

Role: Office Admin or Project Manager

Apply a task template when a new job is started to save time creating standard tasks for specific job types.

- Create singular job tasks.
- Assign tasks to users.
- Schedule existing tasks for completion.

Photos

Role: Office Admin

Prepare a new job with pre-set albums for faster in-field upload or view uploaded photos.

- Create, modify and view albums.
- Manage photos using the photo toolbar: *Select, Sort, Move To, Delete* and *Option*.

Notes

Role: Office Admin

Capture important data about the job site;

- Add supporting images.
- View by most recent or search using keywords.

Attachments

Role: Any User

Consolidate important documents into the job for reference on the web desktop or in the field from the mobile app.

- Add signed copies of work authorization forms, customer satisfaction surveys or adjuster approvals.
- Search attachments by keyword using the ‘Search’ bar for quick access to the files you need.

Reports

Role: Any User

Access job-specific reports such as the job detail report.

- Manage reporting criteria.
- Exclude fields if not applicable to the recipient, then print or download the file.