Recommended Workflow: Start and Manage a Job

This tutorial will define the recommended workflow when starting a new job in Assured JobCheck.

Legend:　　　🟠 **- Web Desktop**　　　🔵 **- Mobile App**

1. 🟠 Open JobCheck Web Desktop and log in as any user.
2. 🟠 Open the *Home* tab and click "*New Job*" to create a new job.
   a. Enter a custom Job Number.
   b. Associate an Office Admin, Project Manager, Estimator and Accountant.
   c. Enter First Contact Info.
   d. Create the *Customer Account* – (whoever you are doing the work for).
   e. Create a *Main Contact*, include email and mobile number.
   f. Enter Loss Information and select all *Immediate Concerns*.
   g. Click *"Save"*.
3. 🟠 Click the *Tasks* tab → Apply a task template.
4. 🟠 Click the *Photos* tab → Pre-setup albums per your SLA (albums by room, or timeline).
5. 🟠 Click the *Financials* tab → Send Job to QuickBooks.
6. 🟠 Click the *Work Orders* tab → Create emergency work orders, if applicable.

The job is now ready to be updated by the project manager or technician in the field from the mobile app.

7. 🔵 Login to the mobile app on-site → Update the job with loss photos and site notes.
8. 🟠 At the office, click *Financials* → Create a financial plan.
   a. Enter categories of work and values from the estimate.
   b. Create a budget for all categories of work.
9. 🟠 Create work orders using the budgeted estimate items.
   a. Schedule work orders.
   b. Assign resources.
10. 🔵 Complete tasks and work orders from the mobile throughout the progress of the job.
11. 🟠 As work orders are completed, update the financial progress on completed work orders.
    a. Complete milestones.
    b. Make budget adjustments to remaining work orders as needed.
12. 🟠 Review Job status then close the job.
    a. Complete any outstanding work orders or tasks.
    b. Ensure the job has been invoiced and paid.