




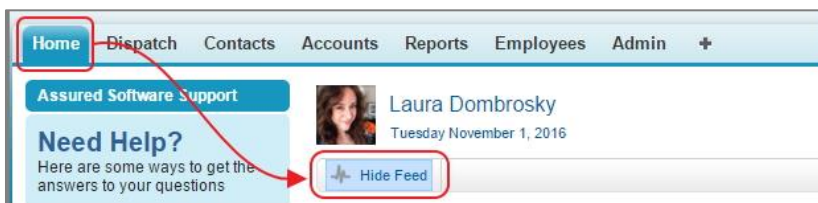
How To: Add a New Job

This tutorial will guide you through the steps for adding a new job in on the JobCheck PackOut Edition web application on your computer (All Editions: Premium, Professional and PackOut).

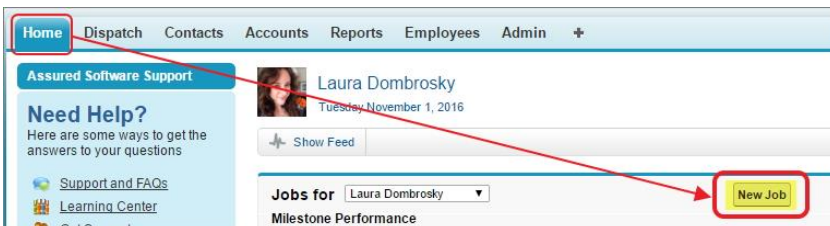
| Bullet points in this document that are indicated by a red bar | are mandatory fields.

Start a New Job

1. Open a web browser (Chrome , Firefox  or Internet Explorer ) and navigate to: <https://assuredsoftware.cloudforce.com>.
2. Log in with your username and password (username is usually your email address).
3. From the Home tab → Click to “Hide Feed” (this will collapse the system wide chatter feed and simplify your view of the home screen).



4. Next, (from the Home tab) → Click “New Job”.



5. | Enter the Job Name (this will be how you recognize the job in a list). JobCheck adds a default control number for every job created, this number is affixed to the front of the job name after the job is saved in the system.
6. | Pick the Type of Job and enter in the details of the loss.

▼ Job Details

Job Name

Type of Job

Loss Occurred [6/15/2017 10:46 AM]

Type of Loss

Cause of Loss

Loss Description

Customer First Contacted [6/15/2017 10:46 AM]

- Enter the *Customer Information*; this is your customer/policyholder.
 If you have done business with this customer before, begin typing their name and you may see their name appear in a dropdown; if this is a new customer, continue to enter the new contact information.

Customer Information

Customer Account	<input type="text" value="Smith, John"/>	Contact Name	<input type="text" value="John Smith"/>
Phone	<input type="text" value="(604) 653-8797"/>	Contact Phone	<input type="text" value="(604) 878-7393"/>
Billing Street	<input type="text" value="726 Richards St"/>	Mobile	<input type="text" value="(604) 898-9789"/>
Billing City	<input type="text" value="Vancouver"/>	Other Phone	<input type="text"/>
Billing Country	<input type="text" value="Canada"/>	Email	<input type="text" value="john.smith@gmail.com"/>
Billing State/Province	<input type="text" value="BC"/>		
Billing Zip/Postal Code	<input type="text" value="V6B 3A4"/>		

- Enter loss address and jobsite contact information.
 If the loss address is the same as the billing address, click 'Copy customer address to loss address' to save on entry time.
- Enter any relevant Policy Information, including the insurance company and adjuster on the file.
 (Contact information recorded in this section will appear on reports)

Policy Information

Self-pay Job	<input type="checkbox"/>	Insurance Company	<input type="text" value="RSA Group Canada"/>
Policy #	<input type="text" value="203948-PL"/>	Adjuster	<input type="text" value="Brian Hill"/>
Claim #	<input type="text" value="W-230483"/>		
Coverage Type	<input type="text" value="Property"/>		
Coverage Amount	<input type="text" value="1,000,000.00"/>		
Deductible Amount	<input type="text" value="1,000.00"/>		
ESL/NTE Amount	<input type="text" value="100,000.00"/>		

- Click the magnifying glass  to search existing insurance accounts.

Lookup

- If the insurance company does not appear in search results, click *New* to create the new insurance account → Click *Save*.

You can use "*" as a wildcard next to other characters to improve your search results.

Account Name	<input type="text" value="RSA Group Canada"/>
Billing Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip/Postal Code	<input type="text"/>
Country	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Website	<input type="text"/>



10. Click “Save” (this saves the job in the system and will now be accessible to all mobile apps in the field; Assured PackOut for iPad, Assured JobCheck for iPhone, and Salesforce1).

▼ Job Details Edit			
Job Number	2-Smith	Office Admin	Aron Wasyliuk
Type of Job	Contents	Project Manager	Ken Rovea
Loss Occurred	6/12/2017 11:56 AM	Estimator	Oliver Woolgar
Type of Loss	Flood	Accountant	Laura Dombrosky
Cause of Loss	Burst Pipe	Site Supervisor	Jessica Sun
Loss Description	Burst water main led to basement flooding. Over a foot of standing water reported.	Contents Manager	Aron Wasyliuk
Customer First Contacted	6/12/2017 11:56 AM		
Customer Information			
Customer Account	Smith, John	Contact Name	John Smith
Phone	(604) 653-8797	Contact Phone	(604) 878-7393
Billing Street	726 Richards St	Mobile	(604) 898-9789
Billing City	Vancouver	Other Phone	
Billing Country	Canada	Email	john.smith@gmail.com
Billing State/Province	BC		
Billing Zip/Postal Code	V6B 3A4		
Loss Address & Contact Information			
Loss Street	726 Richards St	Contact Name	Mary Smith
Town/City	Vancouver	Contact Phone	(604) 889-4545
Country	Canada	Mobile	(604) 889-6354
State/Province	BC	Other Phone	
Zip/Postal Code	V6B 3A4	Email	
Policy Information			
Self-pay Job	<input type="checkbox"/>	Insurance Company	RSA Group Canada
Policy #	203948-PL	Adjuster	Brian Hill
Claim #	W-230483		
Coverage Type	Property		
Coverage Amount	\$1,000,000.00		
Deductible Amount	\$1,000.00		
ESL/NTE Amount	\$100,000.00		
► Additional Details Edit		► Associated Jobs	

Additional Job File Information

Once the job has been saved, additional job detail sections are available for recording additional information: Additional Information and Associated Jobs; these fields are not mandatory.

▶ **Additional Details** [Edit](#)

Immediate Concerns:

These are known concerns that may require planning or special handling when dispatching the team for the site inspection.

Structural Assessment:

This is often filled out after the site inspection has been completed and when more is known about the loss and the scope of damage.

Lead Information:

This is where the source of this business can be captured. Like the insurance company contact, using the magnifying glass will allow you to create the referral for this job.

Other Insurance Contacts:

If the customer is insured through an independent adjuster or agent firm, these contacts can be added here.

Additional Notes:

Enter any additional information about the job, this might include a job narrative, information about the primary contact onsite or specific directions to the loss-site.

▶ **Associated Jobs**

Associated Jobs:

If your performance on the emergency or contents job results in you winning the reconstruction/rebuild work then this section allows you to quickly create a new job for the restoration, saving time on data entry by copying contact and standard job information gathered for the initial job.

For additional support or assistance, visit our [online support portal](#), contact our technical support team at 1-877-277-9933 or email us directly at support@assuredsoftware.com.