




## Recommended Workflow Tutorial: Site Inspection Reports

This tutorial will demonstrate the workflow steps to create a new job file, update the site inspection information and create an initial site report ready to be shared with adjuster.




### Step 1: Create a New Job File (Desktop)

1. | Open a web browser (Chrome , Firefox  or Microsoft Edge ) and navigate to: <https://assuredsoftware.cloudforce.com>.
2. | Log in with your username and password (username is usually your email address).
3. Create a new job.
  - a. Assign your Project Manager/Estimator to the job.
  - b. Enter all known job details → Click **Save**.
4. (*Optional*) – click on *Attachments* to pre-setup photo folders for 1- Pre-Existing Damage Photos & 2 – Claim Related Damage Photos.

The job is now ready to be updated via the Salesforce Mobile App during the site inspection.

### Step 2: Update the Job File with Site Inspection Information (Mobile App)

1. | Open the Salesforce mobile app  on your mobile device.
2. | Log in with your username and password (username is usually your email address).
3. Search for the job you would like to update with site inspection information.
  - a. Click on the search bar and type the name of your customer → Search.
  - b. Type on header Jobs to see jobs related to your customer.
  - c. Tap on the job record from the list to open the job.
4. Click on **Details** → Click **Edit**.
  - a. Update the job details with claim information, reserves and any questions for adjuster.
  - b. Click to *Save*.
5. Scroll to the bottom of the *Details* page and select *Attachments*.
  - a. Create a photo folder or select one from the list.
  - b. Tap *New Photo* to add a photo to the folder.
  - c. Select a photo from your library or take a new photo in app → **Choose**.
  - d. The photo will be uploaded to your photo attachments in the job.
  - e. Upload all photos related to the site inspection.

Once the in-field update is complete, the report can be created in the office via a web browser.


**Step 3: Create the Site Inspection Report (Desktop)**

1. Log back in to [Assured JobCheck](#).
2. Open the job file from the home page.
3. Navigate to the *Attachments* tab.
4. Click **Add Forms** → *Select the Initial Site Inspection Form Template* → Click **Next**.



If the system produces a warning that fields are missing, click **Preview** to view the missing fields. Update the missing fields, if required, and preview again to confirm all fields are displayed.

5. Click **Save** to save the report to attachments.
6. Next, select the photos/photo folders you would like to include in the photo report.
  - a. Click **Photo Report** – the report will generate in the export queue then update in the attachments list.
  - b. Refresh page – this should deselect all photos/folders.
7. Select the *Site Inspection Report PDF* and the *Photo Report PDF*.
  - a. Click **Merge Reports**.
  - b. Name the merged report → Click **OK**.



The system will allow up to 3 files to be merged at one time. Select the files to merge in the order that you would like them to appear in the merged document.

The merged report PDF will be saved to your *Attachments* tab.


**Step 4: Email the Site Inspection Report (Desktop)**

1. From the *Attachments* tab within the job, select the *Site Inspection Report*.
2. Click **Email**.
  - a. Type to enter the email address of your intended recipient.
  - b. Enter a subject line.
  - c. Leave the default, *Attach as Link*.
  - d. Enter a body for your email.
  - e. Click **Send**.

The system will email a link to view the report online. Your Adjuster or Agent can then choose to download and save the report to their files or print the file.

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](mailto:support@assuredsoftware.com).