assuredJobCheck[™]



Admin Tutorial

How To: Create a Chain of Custody Report

This tutorial will demonstrate the step-by-step workflow to create a Chain of Custody report. The chain of custody report is used to track job and custody information relating to the samples being taken during the environmental assessment. Multiple custody details can be added to each chain of custody, detailing the specific tests run during that investigation. The chain of custody detail can be updated from either the Salesforce[®] Mobile app or the JobCheck[®] web interface, this tutorial will cover both.

Create Chain of Custody via JobCheck[®] Web App

- 1. Open a web browser (Chrome , Firefox or Microsoft Edge) and navigate to: <u>https://assuredsoftware.cloudforce.com</u>.
- 2. Log in with your username and password (username is usually your email address).
- 3. Open the job you would like to create the chain of custody for.
- 4. Navigate to the *Chain of Custody* tab.

Detail Activity Attachments Inventory	Financial Work Ord	ers Schedule	Chain of Custody	
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- 5. Click New Chain of Custody.
- 6. Enter the chain of custody information \rightarrow Click **Save**.

Chain of Custody Edit New Chain of Custody	Help for this Page 🥹
Chain of Custody Edit Save Save Cancel	
Chain of Custody Name Sample 1 Job Id 18	
Information	= Required Information
Project Id 71 Project Description Weilman Spore Test Zip/Postal Code 89765 PO Number Sampled by	2021-12-07, 6:00 p.m. [<u>2021-12-07, 6:00 p.m.</u>] Mike Winters
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Save Save & New Cancel	





Admin Tutorial

Create Chain of Custody Detail

The chain of custody detail is a record of specific tests or assessments done during the inspection. Multiple details can be added per each Chain of Custody.

- 1. From the *Chain of Custody* tab, select the Chain of Custody to add samples for.
- 2. Click New Chain of Custody Detail.
- 3. Enter the chain of custody detail for the tests run.

Chain of Custody Detail Edit Help for this Page 🕜									
Chain of Custody Detail Edit Save Save & New Cancel									
Chain of Custody Detail Name Chain of Custody	Surface Spore Analysis Sample 2								
Information	= Re	quired Information							
Sample Id	8								
Description	Initial Visit and Inspection								
Sample Type	SW – Swab								
Sample Type Other									
TAT	ND - Next Business Day								
Total Volume									
Notes									
Non Culturable	Direct Microscopic Exam (Qualitative) 🗸								
Culturable	1-Media Surface Fungi - Full speciation								
Other Analysis									
	Save Save & New Cancel								

- 4. Click Save.
- 5. Click Back to Chain of Custody.

Create Chain of Custody Report

Once the Chain of Custody and Chain of Custody Detail are entered, the Chain of Custody Report can be created.

1. Click Chain of Custody Report.

The report will open in a new tab. From there, it can be saved to desktop and uploaded to attachments.



The chain of custody report must be created via the JobCheck[®] web application. Reports cannot be created via the Salesforce[®] mobile app at this time.

Admin Tutorial



Create Chain of Custody via Salesforce[®] Mobile

- 1. Log in to the Salesforce[®] mobile 🕑 app using your handheld device.
- 2. Click the magnifying glass in top right to search for your job by name.
 - a. Type in your job name \rightarrow Select **Jobs** as your filter \rightarrow Select your job from the list.



3. From the job, click *Related* \rightarrow then *Chain of Custody* \rightarrow **New**.

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4. Enter Chain of Custody information \rightarrow Click **Save**.





Create Chain of Custody Detail (Salesforce® App)

1. From the chain of custody page, select the chain of custody that you would like to add the detail for \rightarrow Tap *Related* \rightarrow Tap *Chain of Custody Detail* \rightarrow Tap *New*.

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Chain of Custody 3 items						ain of Custody						1	Related			_	Chain 0 items	of Custod	y Detail		
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- 2. Add in the chain of custody detail and click **Save**.
- 3. Chain of custody report must be created via the JobCheck[®] Web App.

For additional support or assistance, visit our <u>online support portal</u>, contact our technical support team at 1-877-277-9933 or email us directly at support@assuredsoftware.com.