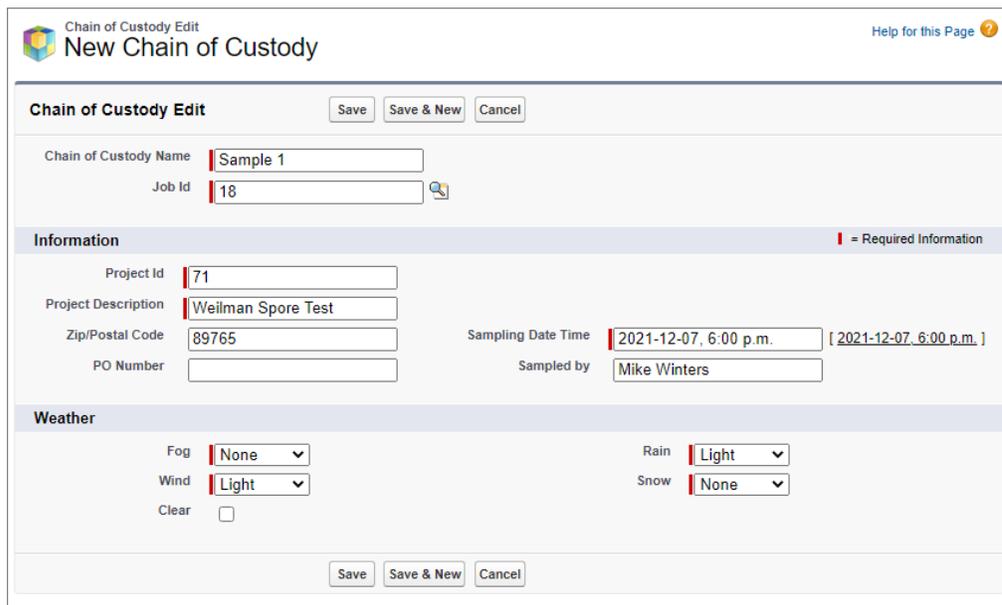# How To: Create a Chain of Custody Report

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: https://assuredsoftware.cloudforce.com.
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 Orders	Schedule	Chain of Custody

5. Click **New Chain of Custody**.
6. Enter the chain of custody information → Click **Save**.
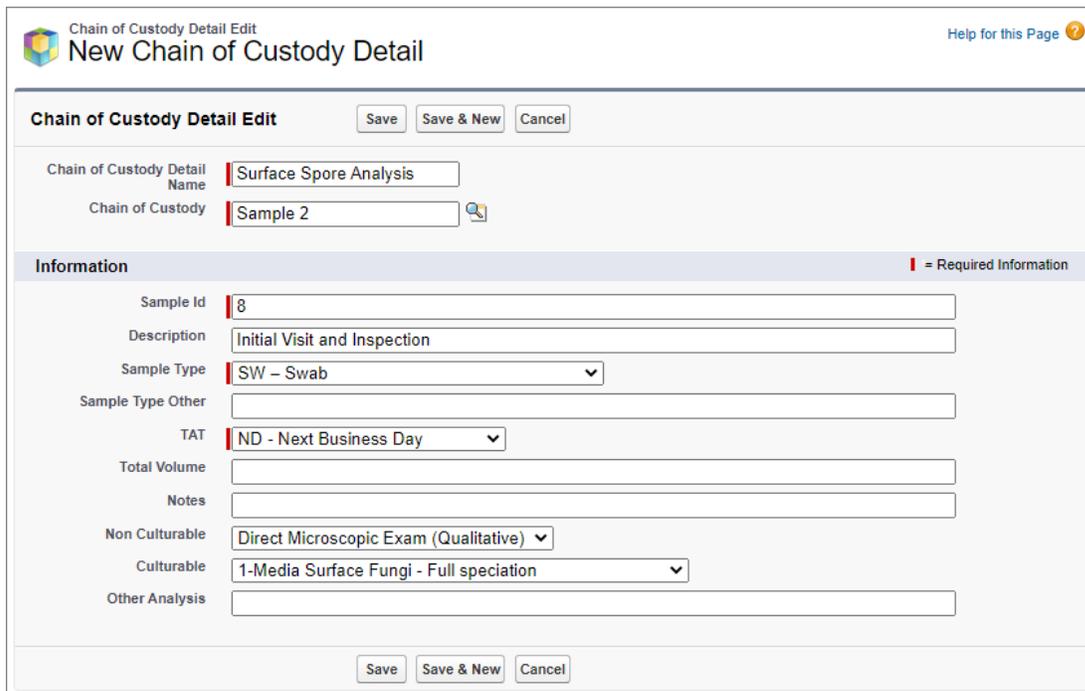
Create Chain of Custody Detail

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
New Chain of Custody Detail   Help for this Page

Chain of Custody Detail Edit   Save Save & New Cancel

Chain of Custody Detail Name: Surface Spore Analysis
Chain of Custody: Sample 2

Information   = Required 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.

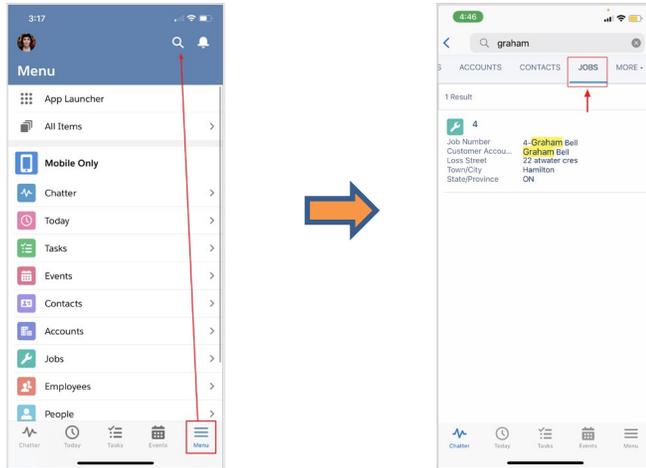1. Click **Chain of Custody Report**.

The report will open in a new tab. From there, it can be saved to desktop and uploaded to attachments.
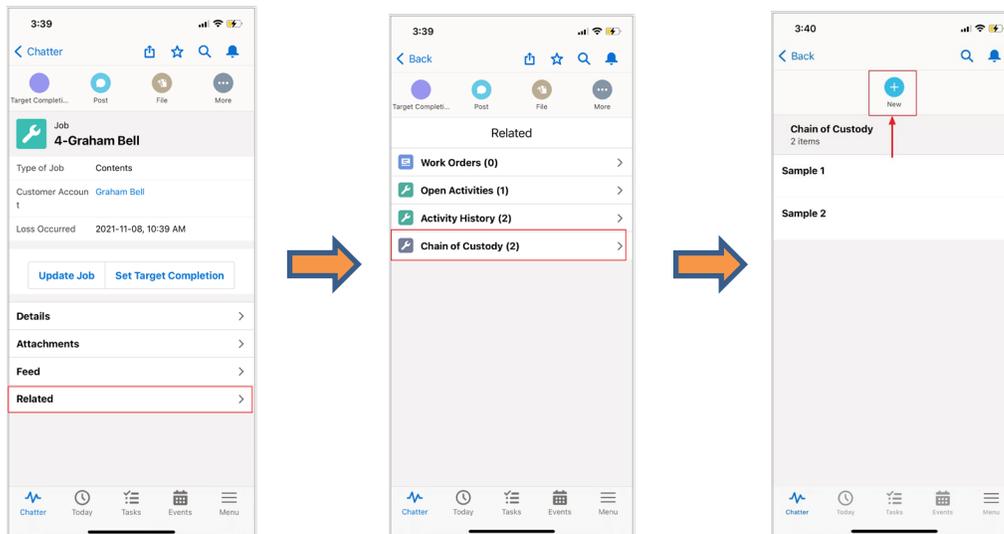
> The chain of custody report must be created via the JobCheck® web application. Reports cannot be created via the Salesforce® mobile app at this time.

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 → Select **Jobs** as your filter → Select your job from the list.
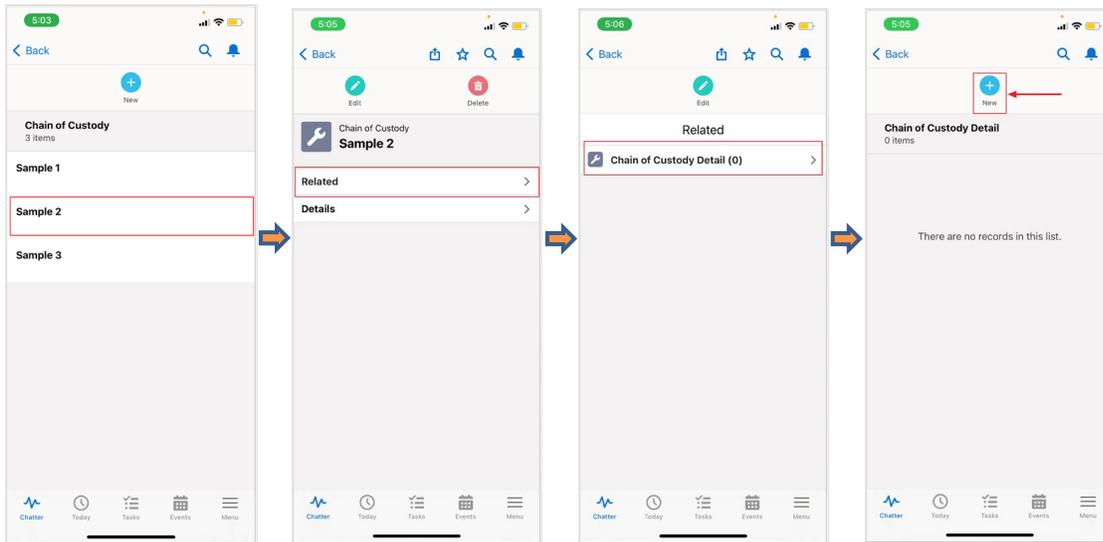

3. From the job, click *Related* → then *Chain of Custody* → **New**.

4. Enter Chain of Custody information → 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 → Tap *Related* → Tap *Chain of Custody Detail* → Tap **New**.

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 online support portal, contact our technical support team at 1-877-277-9933 or email us directly at support@assuredsoftware.com.