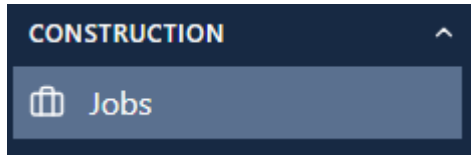


Creating a New Construction Job

Step 1: Access the Construction Jobs Dashboard



- Navigate to the **Construction** section in the left-hand menu and select **Jobs**.
- Click the **+ New Job** button located in the top right corner of the screen.



Step 2: Enter Customer Details

In the **Customer** tab of the popup window, provide the primary client information:

- **Primary Contact:** Enter the **First Name**, **Last Name**, **Phone**, and **Email**.
- **Company & Codes:** Fill in the **Company** name, **Gate Code**, and **Parcel Code** if applicable.
- **Address:** Provide the full **Street Address**, **City**, **State**, and **Zip**.
- **Preferences:** Toggle **Email** or **SMS Notifications** and indicate if there are **Pets on property**.
- **Secondary Contact:** Add a second name and contact info if needed, then click **Next**.

Add Construction Job

Follow these steps to create a new construction job.

Customer

Job Address

Job Information

Contacts

Creating new customer

Select existing customer instead

First Name *

Last Name *

Phone

Waite

Phillips

555-555-5555

Email *

Company

Gate Code

waitephillips@notmyemail.com

Philmont Scout Ranch

022026

Street Address *

Community

Country

2727 South Rockford Road

Villa Philbrook

United States

City *

State *

Zip *

Parcel Code

Tulsa

OK - Oklahoma

74114

Z66831

☒ Pets on property

☒ Email Notifications

☒ SMS Notifications

First Name - Secondary

Last Name - Secondary

Phone - Secondary

Email - Secondary

Genevieve

Phillips

555-555-5551

gphillips@notmyemail.com

< Previous

Next >

Step 3: Confirm Job Address

- In the **Job Address** tab, you can toggle **Use Customer Address** to automatically pull the info from the previous step.
- Verify the **Job Location** details and click **Next**.

×

Add Construction Job

Follow these steps to create a new construction job.

Customer

Job Address

Job Information

Contacts

Job Location

Use Customer Address

Use the same address as customer address for job location

☒

Address *

2727 South Rockford Road

Community

City *

Tulsa

State *

Oklahoma

▼

Zip Code *

74114

Country

United States

▼

Gate Code

022026

Parcel Code

Z66831

☐

Pets on property

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Next >

Step 4: Configure Job Information

This tab links the financial and scheduling data to the project:

- **Naming:** Enter a **Job Name** and **Job Number**.
- **Templates:** Select the **Project Type** (e.g., Pool & Spa), the current **Status**, and the appropriate **Job Template**.
- **Financials:** Choose a **Draw Schedule** and enter the **Contract Value**.
- **Key Dates:** Set the **Project Start Date**, **Contract Date**, and **Project Due Date**.
- Click **Next** to proceed.

×

Add Construction Job

Follow these steps to create a new construction job.

Customer

Job Address

Job Information

Contacts

Custom Fields

Job Name *

Job Number

Project Type

Status *

Job Template

Draw Schedule

Contract Value

Created On

Project Start Date

×

📅

Contract Date

×

📅

Project Due Date

×

📅

☐ Warranty

☒ Enable Notifications

☒ Enable Color

< Previous

Next >

Step 5: Assign Team Members & Custom Fields

- **Contacts:** Use the **Contacts** tab to add team members like the **Project Manager** or **Sales** lead.

Add Construction Job
×

Follow these steps to create a new construction job.

Customer
Job Address
Job Information
Contacts
Custom Fields

Team Members

Add

Name	Role	Actions
Select contact...		Save Cancel
Perrodge Ject	Project Manager	⋮
Bor Dum	Sales	⋮

< Previous

Next >

Custom Fields: If your organization uses them, fill out specific details such as **Customer Personality** in the **Custom Fields** tab.

Add Construction Job
×

Follow these steps to create a new construction job.

Customer
Job Address
Job Information
Contacts
Custom Fields

Customer Mood

Customer Personality

- Click **Create Project** to finalize.

Step 6: Verify the New Job

- The job will appear on your **Construction Jobs** dashboard.
- You can use the **Search jobs...** bar to quickly find the new entry by name (e.g., "Phillips, Waite") and view its initial progress milestones like **Permits** or **Layout**.

Jobs

Construction Jobs

Manage and track all your construction jobs

Active Jobs ▾

All Employees ▾

Select Template ▾

All Contractors ▾

Phillips, Waite 2727 South Rockford Road Tulsa, OK, 74114 1 day(Feb. 20)	0 DONE >	Permits Brutus Buffalo TBD	Layout Brutus Buffalo TBD	Excavation ACME BISON INC TBD
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