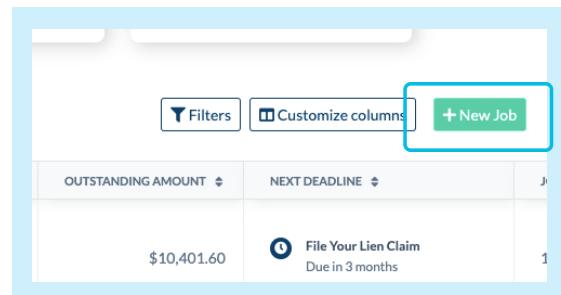
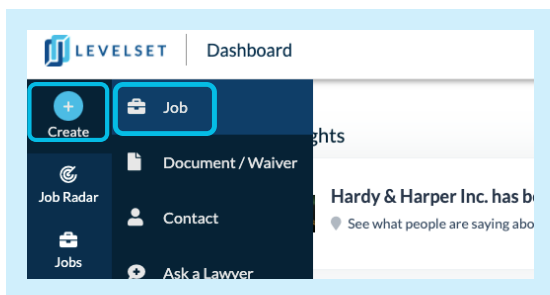


How to Add a Job into Your Levelset Account

Adding a Job into Levelset is the first step. After that, we can track the required documents for you, but we need the key information first! Read on to learn how to add a job with just a couple clicks.

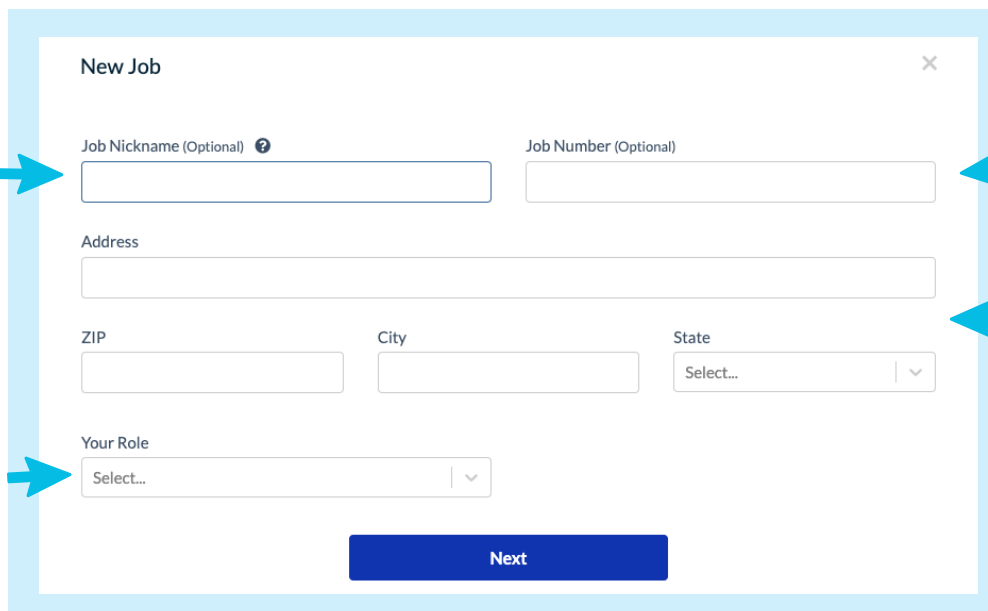
- 1 Step One: Create a new job.** You can start adding a new job in Levelset from a couple different places. You can hover over the **Create** button in the top left hand corner of the account, and then click **Job** or you can go to your **Jobs** page and click the **+ New Job** button in the top right hand corner



- 2 Step Two: Enter job info.*** Next you'll see the **New Job** screen where you will enter the job information. Some fields are required, some are optional. When you're all done filling out the basic job information on the first screen, you'll click the **Next** button at the bottom of the screen.

Job Nickname is whatever you'd like to call this job in the system. If you do not include a nickname, the job will be saved under the job address. Keep in mind this nickname will show up on your preliminary notice.

Select your role and your customer's role from the dropdown menus



The 'New Job' form contains the following fields and a button:

- Job Nickname (Optional) [text input]
- Job Number (Optional) [text input]
- Address [text input]
- ZIP [text input]
- City [text input]
- State [dropdown menu]
- Your Role [dropdown menu]
- Next [button]

Job Number is optional, but necessary if you plan on linking any invoices to this project.

Job Address is where the work is being done.

3 Step Three: Enter Project Type & Customer Info. On the next screen you'll select the project type and enter your customer's information. Once you are done filling in the fields, you'll click the blue **Create Job** button to save the job into your Levelset account. It now lives on your **Jobs** tab over on the lefthand side of your Levelset account.

The screenshot shows a web form for adding a job. At the top left is a map of Beverly Hills with a red pin. To the right of the map is a 'Job Type' section with a list of radio button options: Residential, Owner Occupied Residential, Commercial, State / County, Federal, and Other. Below the map is the 'Your Customer' section, which includes a 'Customer Name' field with a search icon and a dropdown for 'All Contacts', a 'Your Customer's Role' dropdown, a 'Customer Address' field with a 'Use Job Address' link, and three fields for 'ZIP', 'City', and 'State'. At the bottom left is a 'Back' button and at the bottom right is a large blue 'Create Job' button.

This is where you enter your customer's name, role, and address.

You can select the job type from this list. For example, is this job commercial, residential, or public?

What's next? Send your preliminary notice!
[Click here to learn how.](#)