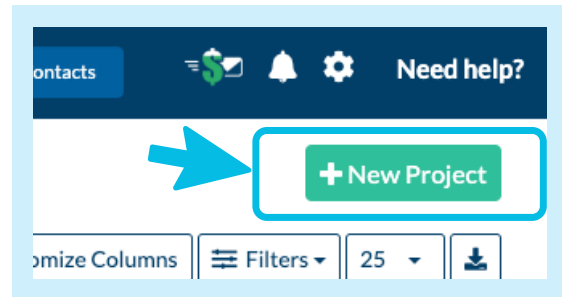
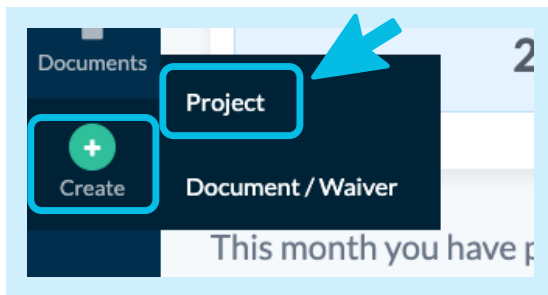


# How to Add a Project into Your Levelset Account

Adding a project 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 with just a couple clicks.

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



- 2 Step Two: Enter project info.** The account will then pull up the **Enter a New Project** screen where you will enter the job information. Some fields are required, some are optional. When you're all done filling out the information, click save! Below you will find this new project screen with some explanations of what each field is asking for.

Project 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.

Project Address is where the work is being done.

**Pro Tip!** If you enter the ZIP first, the city and state will automatically fill in.

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

### Enter a New Project

Project Nickname (Optional) <span style="font-size: small;">?</span> <input type="text" value="Test Project"/>	Project Number (Optional) <input type="text" value="1234"/>	
Line of Business <input type="text" value="Default"/>		
Project Address <input type="text" value="1 Fake Road"/>		
ZIP <input type="text" value="70119"/>	City <input type="text" value="New Orleans"/>	State <input type="text" value="Louisiana"/>
What is the project type? <input type="text" value="Commercial"/>		
What is your role? <input type="text" value="Subcontractor"/>	What is your customer's role? <input type="text" value="General Contractor"/>	
Brief Description of Labor/Material Provided <span style="font-size: small;">?</span> <input type="text" value="Material and labor associated with installation of new HVAC system."/>		

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

If you have multiple lines of business set up in your settings, you can select which one this job is associated with from this dropdown menu. If you only have one, it will default to that one!

You can select the project type from this dropdown menu. Is this job commercial, residential, or public?

We like to keep this brief because it is included on the preliminary notice at the start of a job, so we want to make sure any minor changes are covered!

## ★ Step Two CONTINUED: Enter project info.

If you know the Legal Property Description, you can click this to enter it. Keep in mind, this is information our research team will be able to fill in for you.

Whoever you selected as your customer above, here is where you enter their mailing information so they can receive your notices.

Email address is optional, but you can email these documents as well as mailing them if you've got it!

The screenshot shows a web form for entering project information. The form is divided into several sections:

- Know the Legal Property Description?**: A section with two optional date fields: "Date Labor/Materials First Delivered (Optional)" (with value 2019-09-02) and "Date Labor/Materials Last Delivered (Optional)".
- Customer's Details**: A section for customer information.
  - Name**: A text field with "Our General Contractor" and a dropdown menu for "All Contacts".
  - Address**: A text field with "2 Fake Street".
  - ZIP**: A text field with "70130".
  - City**: A text field with "New Orleans".
  - State**: A dropdown menu with "Louisiana".
  - Email (Optional)**: A text field with "GC@gmail.com".
  - External ID (Optional)**: A text field with "123456".
- Save**: A green button at the bottom right of the form.

While these are optional fields, it's a great idea to put in the first furnishing date while entering in the project information so that we can immediately start tracking any preliminary notice deadlines!

Here you can enter a customer number, if your company uses these.

## What's next? Send your preliminary notice!

[Click here to learn how.](#)

(or [click here](#) to learn how to send a document using your deadlines section.)