

# Send the Right Document at the Right Time Using the Job Summary Page



**LEVELSET**  
Payment help is here.

Let Levelset walk you through each step of protecting your job and prompting quick payment on the job's summary page. Find out what is required of you based on the job details and state you're working in while also seeing optional documents that are helpful in prompting and speeding up payment.

- Step One: Go to a job's summary page.** After creating a new project, your account will automatically bring you into the job "**Summary**" page. Or, if you've already created the job in an earlier session, you can access the job summary page by clicking "**Projects**", hovering over the project, and clicking "**View**" on the right hand side.

Core Project Info	Customer Info	Outstanding Amount	Preliminary Notice Deadline	Notice of Intent to Lien Deadline	Lien or Bond Claim Deadline	Project Created Date
VA Test Test St Yorktown, VA 23690	Test Sub 531 Roselane St Marietta, Georgia 30060	\$0.00	?	?	?	1/16/2019
Prelim Example 1 Test Street Test, WA 43001	My Gc Customer Orange Ave Lafitte, Louisiana 70067	\$50,000.00	?	Voluntary	?	4/8/2019
Test Project 1 Test Job Street Beverly Hills, CA 90210	Big GC 4819 Prytania St New Orleans, Louisiana 70115	\$100,000.00	?	Voluntary	?	4/11/2019

- Step Two: Figure out required or optional next steps on the job.** On the left side of the job summary page, you'll find all required and recommended documents you may need to protect your lien rights. The documents and any corresponding deadlines are divided into two sections: **Notice Requirements to Protect Your Job** and **Lien Requirements When You're Not Being Paid**. The documents you see are specific to the job type, your role on the job, and state in which the job is located - information you provided in the project details.

**Notice Requirements to Protect Your Job**

**Preliminary Notice Due**  
Due in 2 weeks, on 11/3/2020.

**Lien Requirements When You're Not Being Paid**

**Send a Notice of Intent to Lien (Optional)**  
Warn key project stakeholders of a payment problem.

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**3** Step Three: Provide project dates to trigger document deadlines. This information could be your first day on the job, last day, or maybe invoice information. We'll request whatever is needed based on the state's legal requirements. If we are missing the information we need to track a deadline, we'll pin it to the "Actions to Take Right Now" section at the top. You also will see a "Calculate Deadline" button next to the document listed, where you can read about the statute and see what triggers the deadline. You can also check out the different icons to the left of the document type. If there's a "?", it means we need some more information to track that deadline! As soon as you update the applicable date and click on "Save", we will start tracking the deadline for you.

**Actions to Take Right Now**

- See your notice deadlines  
When did you start work?
- See your lien deadlines  
When did you finish work?

**Notice Requirements to Protect Your Job**

- Preliminary Notice Due  
Based on Date Labor or Materials First Delivered

Calculate Deadline

**Actions to Take Right Now**

- See your lien deadlines  
When did you finish work?

**Notice Requirements to Protect Your Job**

- Preliminary Notice Due  
Due in 2 weeks, on 5/18/2020. County delays expected!

Create Notice

★ When you're ready to create and order a specific document, just click the "Create Notice" button that pops up along the right-hand side of the document tracking and follow the steps!

⚡ Interested in learning more about how to create a document in Levelset? Click here for our instructions on [How to Order a Preliminary Notice](#) (all documents follow the same steps).

Last updated on October 19, 2020