MIGHTY PROCESS SERVER | TUTORIAL 2 OF 3

# How to Create a Job and Assign a Server

A job is one service of process: the papers, the person to serve, where to find them, and who will do the serve. This guide walks you through the six steps of the Create New Job wizard. Free includes up to 25 assigned jobs per month.

mightyprocessserver.com

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## Our example job: Hollywood v. Chris Kringle

To keep things friendly, the screenshots use a silly, made-up job. Nobody is really being served.

| Field | Sample value |
|---|---|
| Plaintiff | Hollywood (sample) |
| Defendant and person to serve | Chris Kringle (sample) |
| Case number | TEST-REVIEW-001 (sample) |
| Service address | 100 Example Lane, Exampleville, CA 90001 (made-up address) |
| Documents | Summons and Complaint (sample PDF marked TEST ONLY) |

**Sample only:** Every name, address, document, and photo in this guide is fictional and used for training. Santa will not be getting a summons.

## What you need before you start

- The documents to be served, as a PDF (up to 25 MB)
- Your customer's name, or the company you are doing the job for
- The name and address of the person to be served
- Any supporting files, such as a photo of the person to be served (optional)

## Start a new job

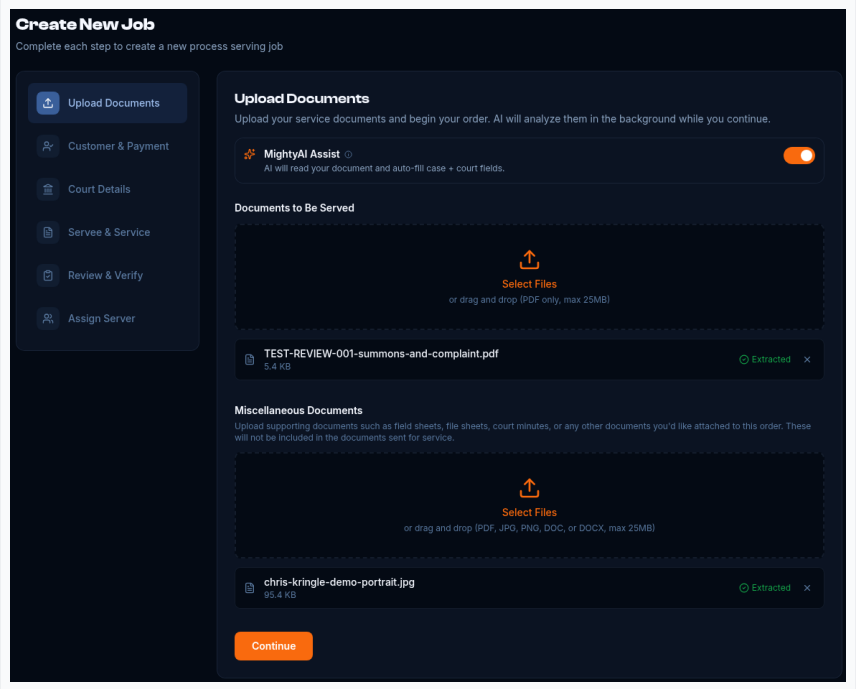
1. Sign in at mightyprocessserver.com/auth/login.
2. Click **My Jobs** in the left menu. Your jobs are listed here, with tabs such as **All Jobs**, **Drafts**, **Pending**, **Assigned**, **Affidavit**, and **Completed**.
3. Click **Create Job**. The **Create New Job** page opens with six steps down the left side: **Upload Documents**, **Customer & Payment**, **Court Details**, **Servee & Service**, **Review & Verify**, and **Assign Server**.

**Tip:** Your work saves as you go. From step 3 on, you will see **Saving...** and then **Saved** at the top of the screen, and you can click **Save Draft** at the top right any time.

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# Step 1: Upload Documents

1. Leave **MightyAI Assist** turned on. It reads your documents and fills in case and court details for you.
2. Under **Documents to Be Served**, click **Select Files** or drag your file into the box. This box takes PDF files only, up to 25 MB.
3. Wait for the file to change from **Analyzing...** to **Extracted**.
4. Under **Miscellaneous Documents**, add any supporting files you want attached to the job, such as field sheets, court minutes, or a photo. This box takes PDF, JPG, PNG, DOC, or DOCX files up to 25 MB. These files are not included in the documents sent for service.
5. Click **Continue**.

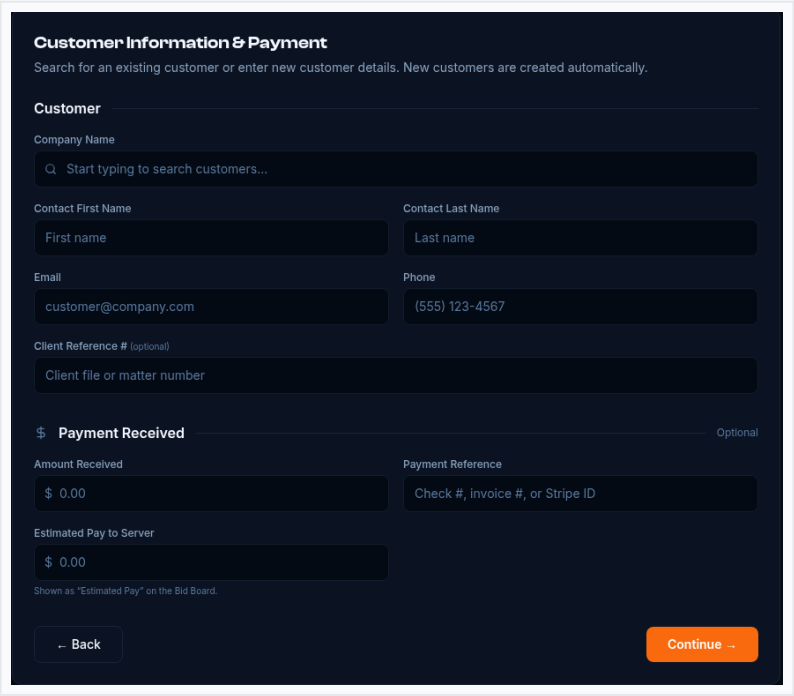



Step 1 with the sample Hollywood v. Chris Kringle documents uploaded.

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## Step 2: Customer & Payment

1. Under **Company Name**, start typing to search your existing customers and pick one from the list. If the customer is new, type the name. New customers are created automatically.
2. Enter the **Contact First Name** and **Contact Last Name**.
3. Add the customer's **Email** and **Phone** if you have them.
4. Add a **Client Reference #** if your customer uses a file or matter number. This is optional.
5. **Payment Received** is optional. If you have already been paid, enter the **Amount Received** and a **Payment Reference** such as a check number or invoice number.
6. **Estimated Pay to Server** is shown as the estimated pay on the Bid Board.
7. Click **Continue**.



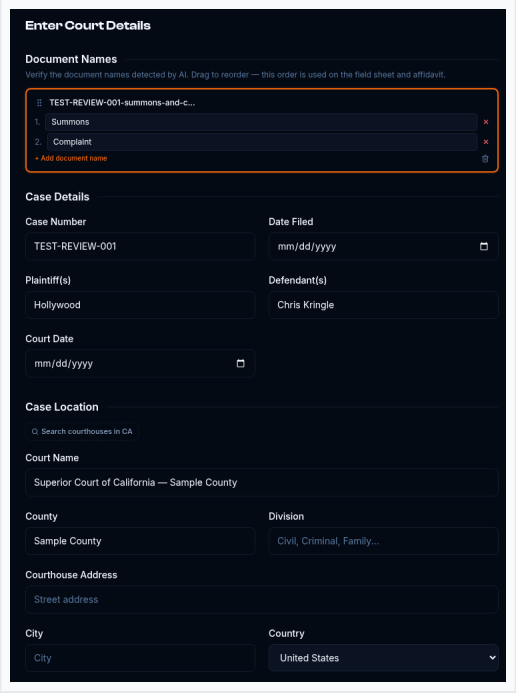

Step 2: who the job is for, and any payment already received.

## Step 3: Court Details

From here on, your document opens on the left and the form is on the right, so you can check each detail against the papers.

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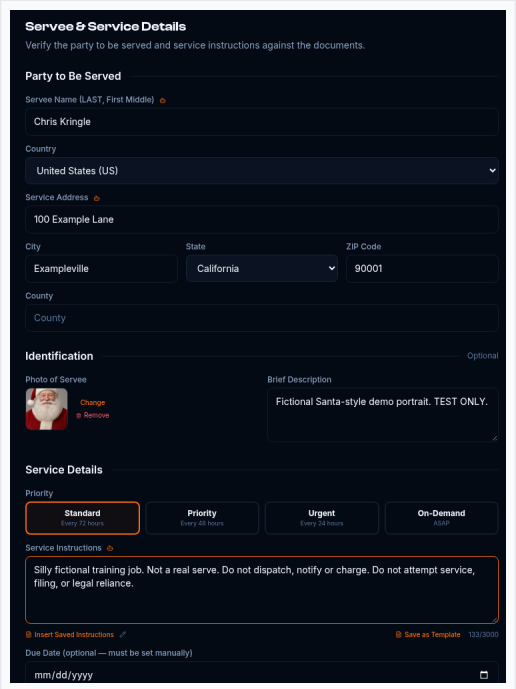
1. Under **Document Names**, check the names MightyAI found, such as **Summons** and **Complaint**. Drag them to reorder. This order is used on the field sheet and affidavit. Click **Add document name** to add one.
2. Under **Case Details**, check the **Case Number**, **Plaintiff(s)**, and **Defendant(s)**. Add the **Date Filed** and **Court Date** if they apply.
3. Under **Case Location**, search for the courthouse or check the **Court Name**, **County**, and **Division**. Add the **Courthouse Address**, **City**, **Country**, **State**, and **Zip** if you have them.
4. Click **Continue**.




Step 3: MightyAI filled in the sample case number, parties, and court.

# Step 4: Servee & Service

1. Under **Party to Be Served**, check the **Servee Name** (last name, first name, middle name), **Country**, **Service Address**, **City**, **State**, **ZIP Code**, and **County**.
2. Under **Identification**, you can add a **Photo of Servee** and a **Brief Description** to help the server recognize the person. This section is optional.
3. Under **Service Details**, pick a **Priority**: **Standard** (every 72 hours), **Priority** (every 48 hours), **Urgent** (every 24 hours), or **On-Demand** (ASAP). Standard is selected by default.
4. Type any **Service Instructions** for the server. Click **Insert Saved Instructions** to reuse text you saved before, or **Save as Template** to save these instructions for next time.
5. Set a **Due Date** if the job has one. This is optional and must be set by hand.
6. Click **Continue**.

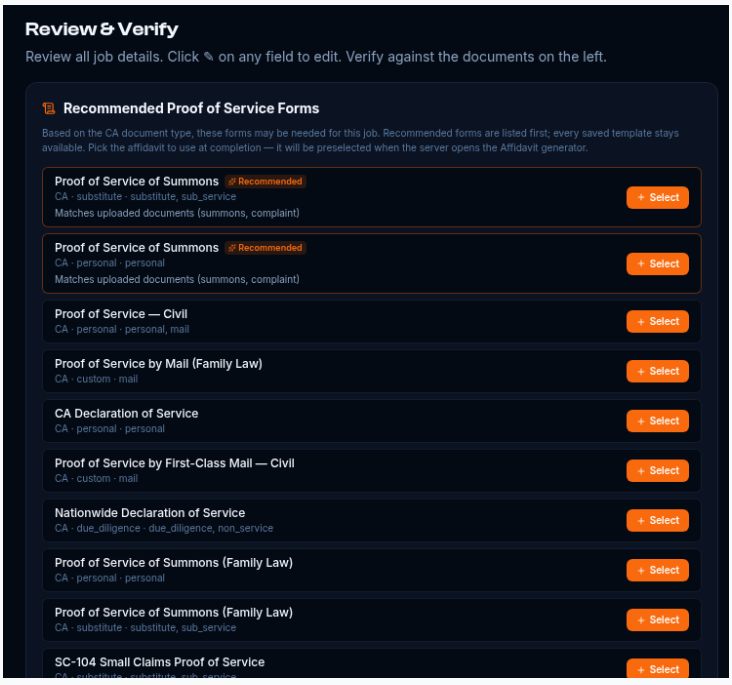



Step 4: the sample servee, a fictional photo, and the priority choices.

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## Step 5: Review & Verify

1. Read through the summary of the **Customer**, **Servee Information**, **Case Details**, **Documents**, and **Service**. Click the pencil icon on any field to edit it, and check it against the documents on the left.
2. Look at **Recommended Proof of Service Forms**. Based on your documents, Mighty Process Server lists forms that may be needed for this job, with recommended forms first.
3. If you already know which affidavit you will use, click **Select** next to it. It will be preselected when the job is completed and the Affidavit Generator is opened. This is optional. Every saved template stays available later.
4. Click **Assign Server**.




Step 5: review the job and, if you like, pick the affidavit form now.

## Step 6: Assign Server

This is where you decide who will serve the papers. You have three general ways to get a job served:

- **Hire a private server.** Bring in a process server you work with directly.
- **Use a favorite server.** Send the job to a server you have saved and trust.

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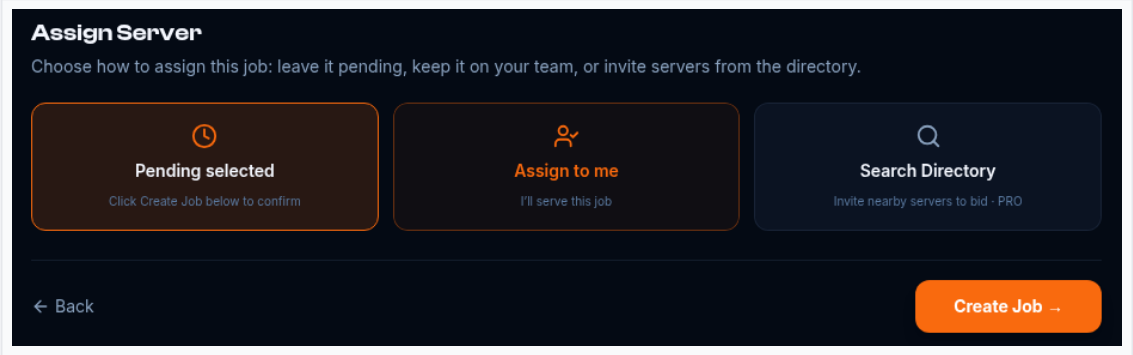
- **Choose a server from the directory.** Find a server near the service address in the Mighty Process Server directory.

On the Assign Server screen you will see these cards:

1. **Pending:** selected by default. Leave the job pending if you want to create it now and assign it later.
2. **Assign to me:** pick this if you will serve the job yourself.
3. **Search Directory:** invite nearby servers to bid. This card is marked **PRO**, so it needs a Premium plan.

Choose a card, then click **Create Job**.

> **Plan note:** Inviting saved servers and directory servers to your jobs is part of Premium. On Free, you can leave a job pending or assign it to yourself. See Pricing for details.




Step 6: choose how to assign the job, then click Create Job.

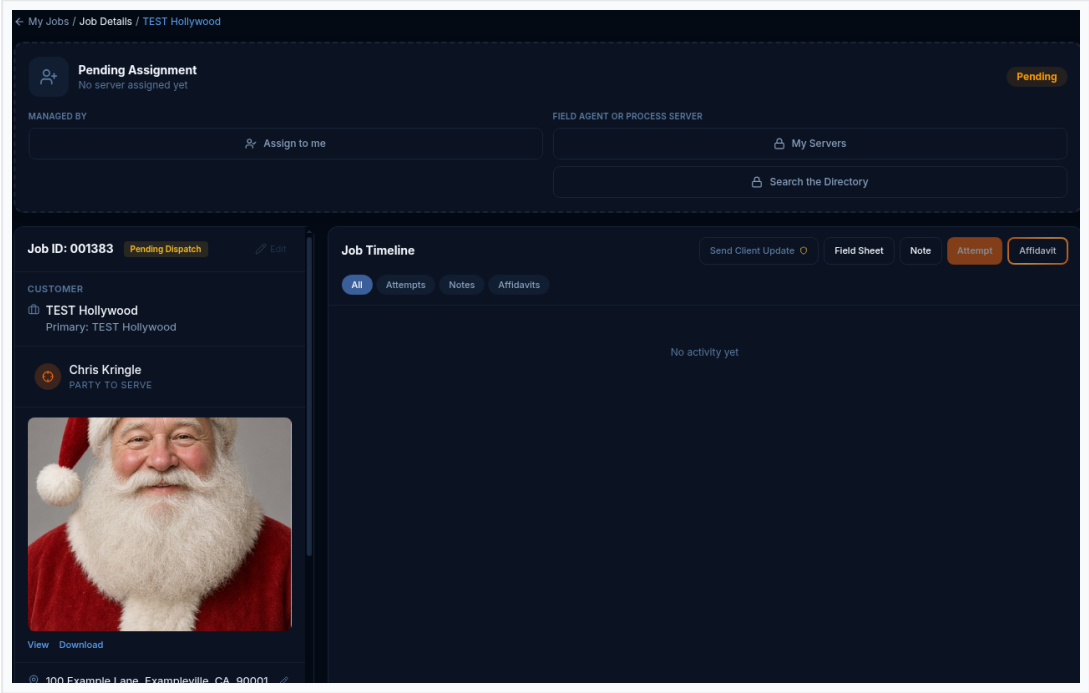
## After you create the job

Your new job opens on its own page. You will see the job ID, the status (for example **Pending Dispatch** and **Pending Assignment** if no server is assigned yet), the customer, the party to serve, any photo you added, and the service address.

From the job page you can:

- Assign the job later. Under **Managed By**, click **Assign to me**. Under **Field Agent or Process Server**, you will also see **My Servers** and **Search the Directory**. These are locked on Free.
- Use the **Job Timeline** buttons to add a **Note**, log an **Attempt**, print a **Field Sheet**, or open the **Affidavit**.

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The saved sample job, shown for training only. Do not dispatch or serve this fictional job.

## Next step

When service is done, it is time to create your proof of service.

- Next tutorial: How to Generate an Affidavit of Service
- Questions? Visit the Help Center and FAQs or email support@mightyprocessserver.com.