# Safeguard Mobile – Completing an Order

This user guide details how to complete an order in the Safeguard Mobile App. The work order script defaults to show all questions on one scrolling page. You do not need to go to a separate page/screen for each question.
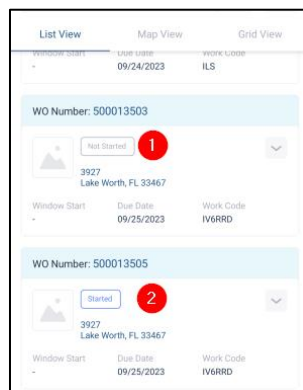
Completing an Order

After logging into the Safeguard Mobile app, the **Orders** page displays. Find the order that needs to be updated.

Tap the dropdown arrow to see additional information about the order.
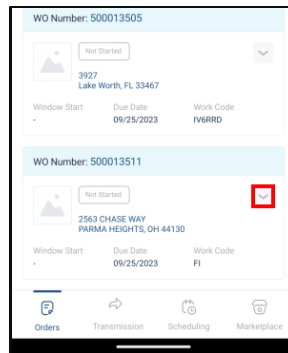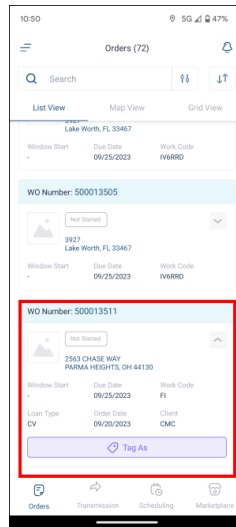

If you have not started the order, then it shows as Not Started (1).

If you have started the order, then it shows as Started (2).

1. Tap the order to access the **Order Details** page.

The Order Details page displays and shows basic information about the property or the work order.   It also allows you to access the various photo features and to start the work order.

1. A **QUEUE** button that sends an order to the transmissions page.
   - It remains grayed out until all required information and photos have been provided.
2. A front of house image if a work order has been previously completed at the location.
3. The property address.
4. The work code.
5. The client code/name.
6. The work order's due date.
7. The lockbox code if an interior inspection.
8. The mortgagor's name.
9. The work order number.
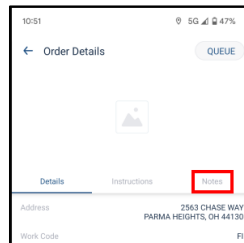10. The order date.

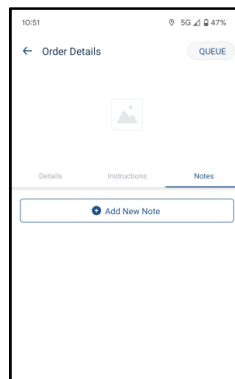2. Tap the **Instructions** tab to view the work order instructions.
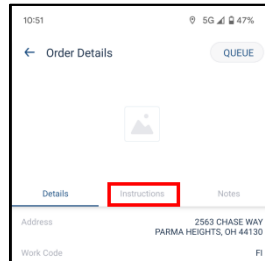
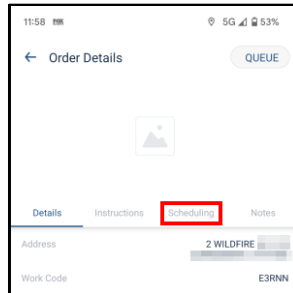The instructions for the work order display.
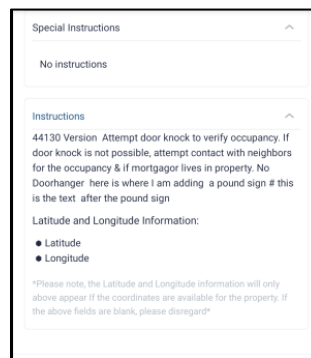
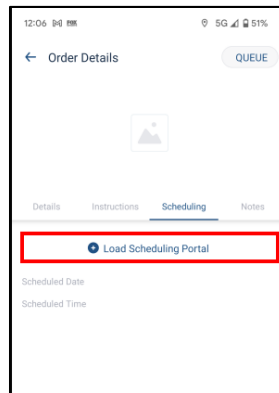3. Tap the **Notes** tab to see or create any notes about the property.
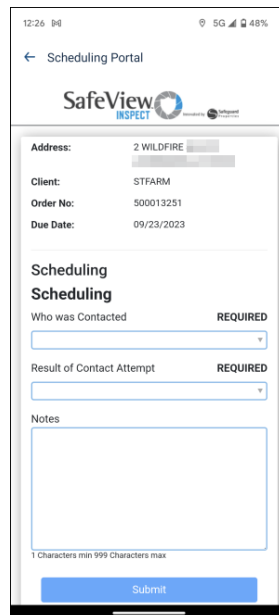

The Notes page displays.

For ISO and Insurance Loss orders, a fourth tab displays: Scheduling.

- Tap the Scheduling tab.
- Tap the **Load Scheduling Portal** button.

The Scheduling Portal page displays and can be completed as needed.

Contact (1), Go (2), and Stop (3) icons also display for these work orders on the Orders page.
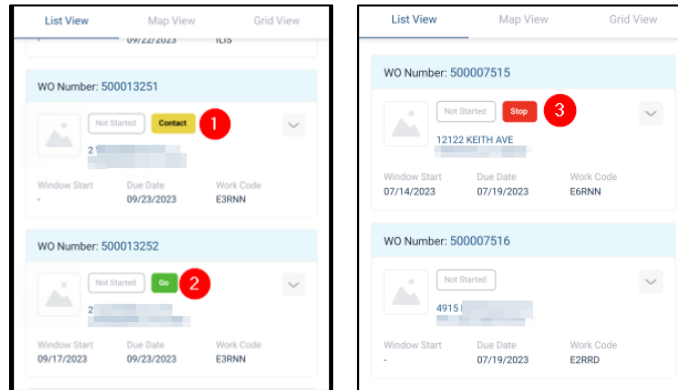
If the IL order has scope documents, then a **Scope Docs** tab is also visible.

- Tap the Scope Docs tab.
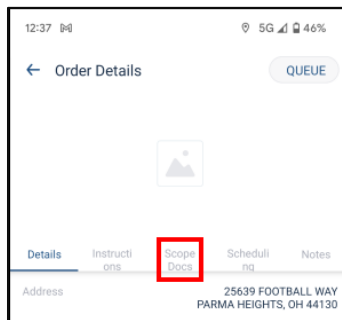
The **Scope Documents** page displays.

- Tap the **Download** button to download the necessary documents.
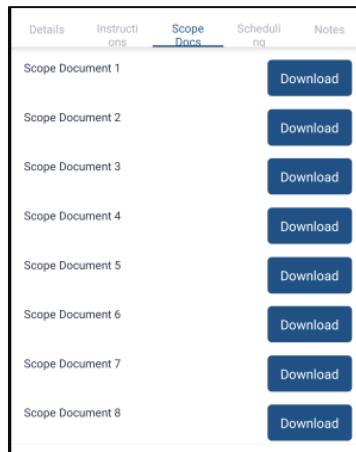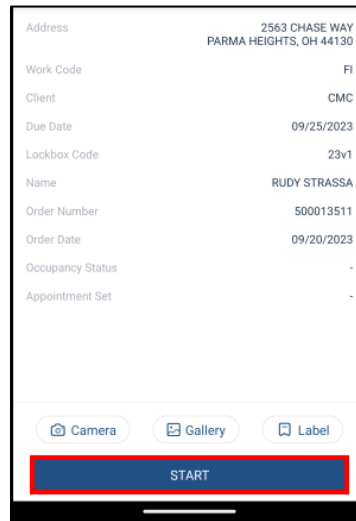
To complete a work order:

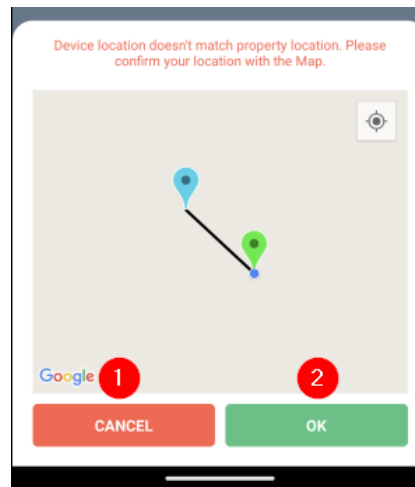4. Tap the **START** button to begin the work order script.

If you are more than 300 feet away from the subject property, then you receive a pop-up notice showing your location compared to the location of the property.

- Tap the **CANCEL** button if you believe you are at the incorrect location.
- Tap the **OK** button if you are at the correct location and wish to continue with the order.

The **Survey**, or work order script, page displays. The page defaults to show questions that are required to complete the script. Additional questions may be added depending on how other questions are answered. The questions themselves are grouped together by station. A station is a group of questions that pertain to a particular topic, such as the main structure, yard, or general condition.

Stations

Tap the **Station** button on the upper right side of the page to see a preliminary list of stations.
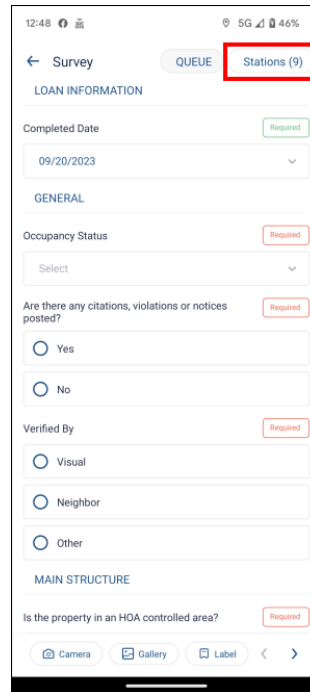
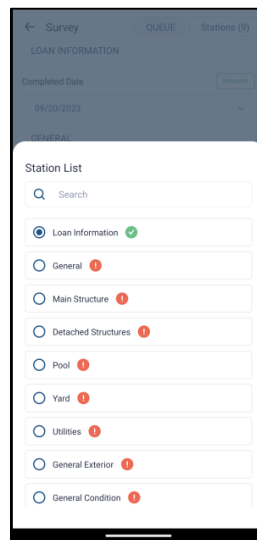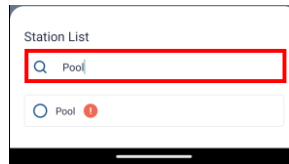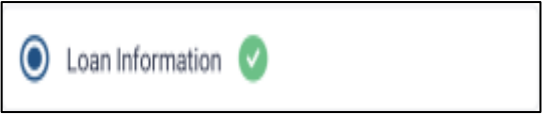The **Station List** screen displays and shows a preliminary list of nine (9) stations in this example. That number can vary based on the type of order being completed and even how questions within the script are answered.

Tap in the **Search** field and enter a station name. Only that station appears in the list.

A green circle with a white check mark means that the station is complete. You have answered all required questions and provided all of the required photos for that station.	
A red circle with a white exclamation mark means that the station is incomplete. You either have required questions to answer and/or required photos you need to provide for that station.	

Tap the station name to be taken to it in the script. This is helpful when completing a long script and you have something to complete in a particular station.
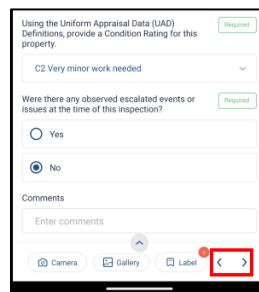
Tap outside of the Station List screen at any time to be taken back to the Survey page.
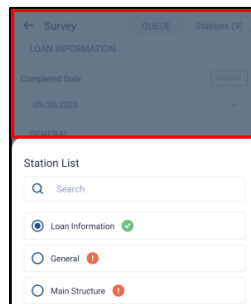
Tapping the left and right arrows at the bottom of the page also takes you from station to station.
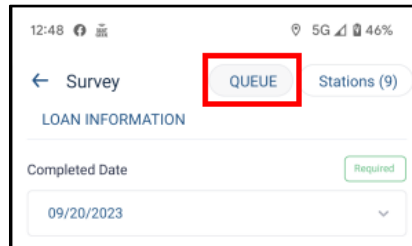
Tap the left arrow to be taken to the previous station.

Tap the right arrow to the taken to the next station.

Queue Button

The **QUEUE** button is also displayed at the top of the Survey page. Again, this button remains grayed out until all required questions have been answered and all required photos have been provided.

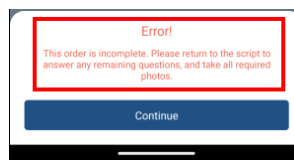If you tap the QUEUE button before all of the required information has been provided, an error message displays at the bottom of the page.
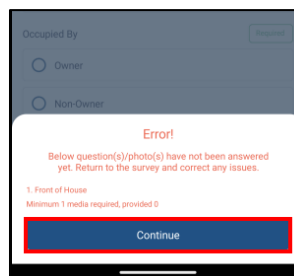
The message details what information is required for the order to be considered as complete.
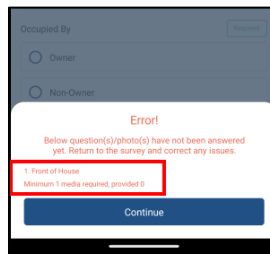
There error message displays up to ten items. If the order has more than ten, then a generic message is shown instead.
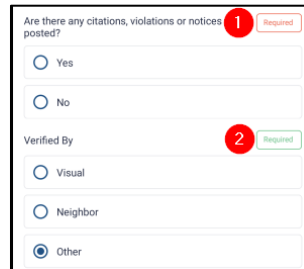

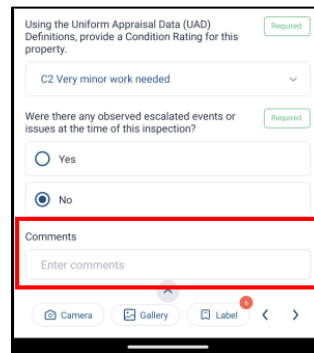Tap the **Continue** button to return to the Survey page.

Answering Questions in the Script
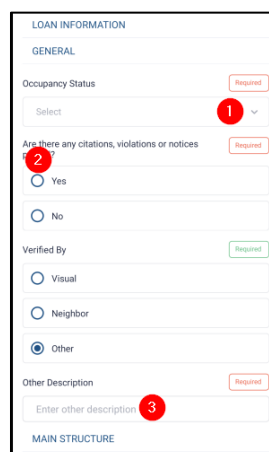
If the question is required and unanswered in the script, a red required box appears on the right side of the page next to that question (1). Once the question is answered that box turns from red to green (2).

There is no designation if the question is not required.

Questions in the script can be accessed and answered through a dropdown arrow (1), by tapping the corresponding radio button (2) or typing in a short answer (3).

1. Answer all questions in the script.
2. Scroll down the page as needed to see additional questions.

Some questions may already be pre-populated with answers.
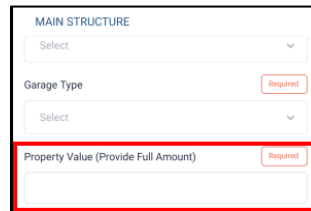
3. Review those answers for accuracy and update/change them as needed.

Please note: The **Property Value** question requires the full amount, not just the first two or three digits of the value.
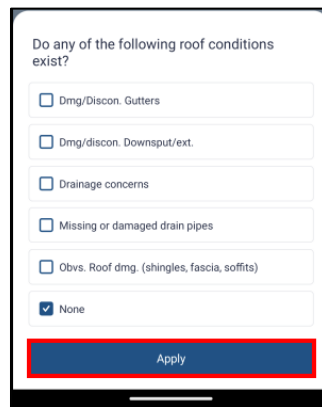

4. Tap the **Apply** button after making your selections if the question allows multiple answers. You may need to scroll within the list of answers depending on the number of options provided.
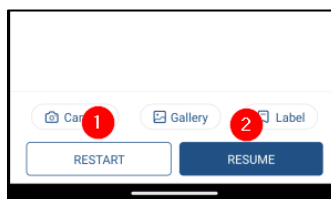
If the information provided in the update was inaccurate, tap the **RESTART** button to start anew (1).

If you exit an order while in the process of completing it, then you can pick up where you left off by tapping the **RESUME** button on the Order Details page (2).
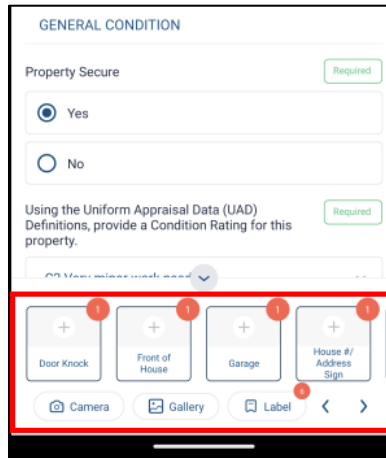
Images

As you answer questions in the script, an image label carousel displays at the bottom of the page. Depending on how questions are answered, additional labels are added.

Tap the down arrow to hide the carousel.
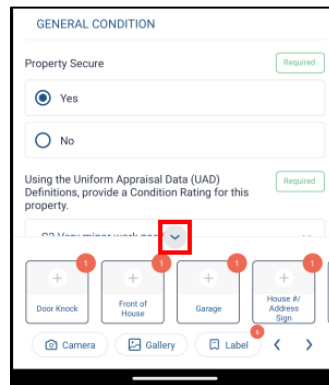
The **Label** button shows the number of images that are required for the order. In this example, there are six (6) required images.

Please see the *Safeguard Mobile – Adding Photos to an Order* user guide for information on how to use the various photo features available in the app.

Completing and Transmitting an Order

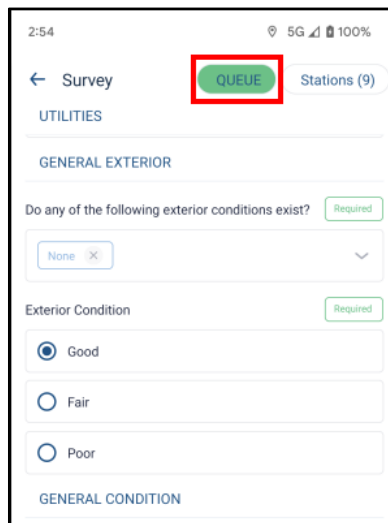Once all the required questions and image labels have been completed, then the QUEUE button turns from gray to green in color.

1. Tap the **QUEUE** button to queue the order for transmission.

The order closes out and you are returned to the Orders page. The order itself moves to the Transmission page.

**Please note:** You do not need to transmit an order immediately after it is completed. This is especially true if you are in an area with limited connectivity and need to wait until there is better service.

Remember, the number next to the Transmission button denotes how many orders have been queued and are waiting to be sent to Safeguard.

2. Tap the Transmission button on the bottom of the page.
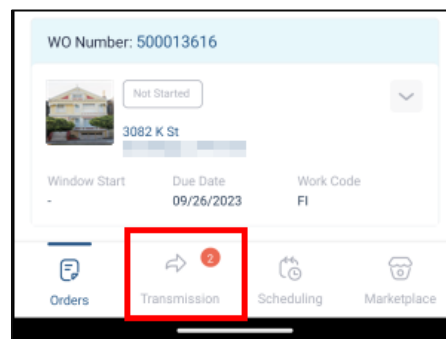
The Transmission page displays and defaults to show any orders pending transmission (1). There are tabs to see any orders that have failed transmission (2) and any that have already been submitted (3).
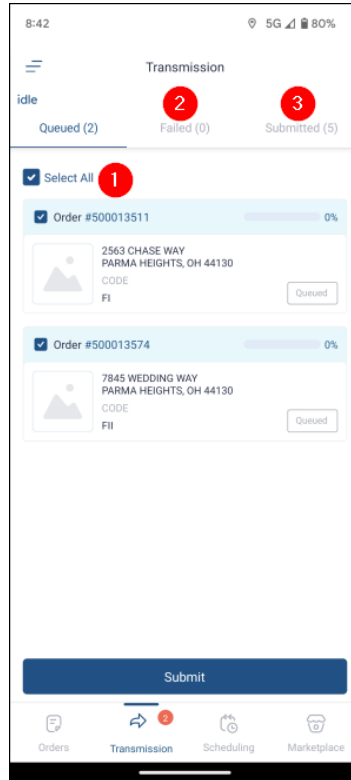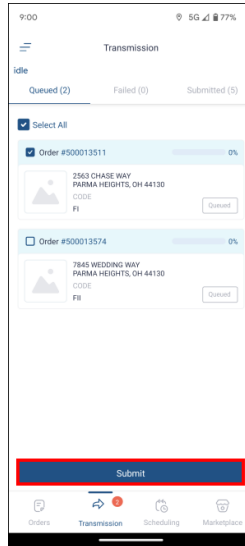

All of the orders listed on the page are selected by default to be transmitted.

If for some reason you do not wish to transmit an order, then tap the checkmark next to the order number to de-select it.

Safeguard Properties Management, LLC
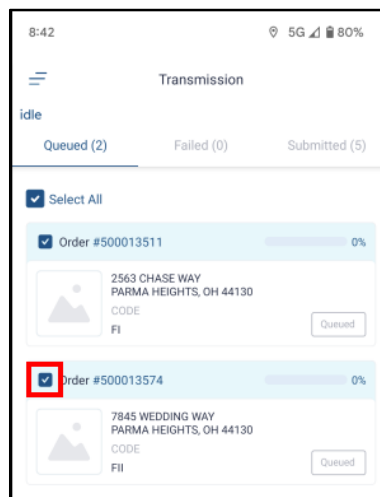
3. Tap the **Submit** button to transmit the remaining checked orders.

The progress bar shows what percentage of the transmission has been completed (1). Likewise, what is currently being transmitted shows at the top of the page (2).
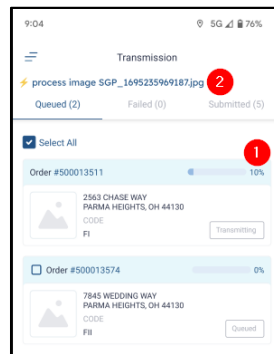
Once the transmission is completed, the top status shows as **finished upload sync** and the order is then moved to the **Submitted** page.
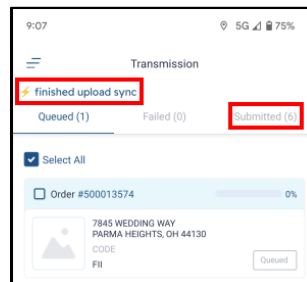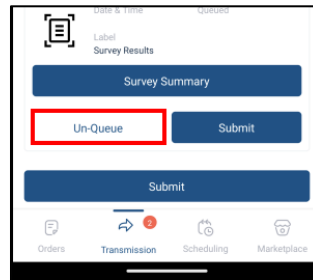
While unchecking an order stops it from being transmitted, it does not un-queue the order. An order can be un-queued by doing the following:
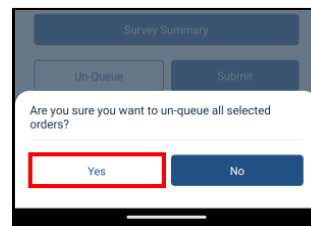
- Tapping the **Queued** button.

All the photos for the order display.

- Scrolling down to the end of the photos.
- Tapping the **Un-Queue** button.

- Tapping the **Yes** button when asked if you are sure you want to un-queue all selected orders.

You are returned to the Transmission page, but the order that has been un-queued is no longer listed.

The order has been returned to the Orders page. You may need to refresh the Orders page for that work order to appear. All information in the order is retained and you can resume it as needed.

Please note: If you tap the **Survey Summary** button, then you can see the entire set of results you have submitted for the work order.

Safeguard Properties Management, LLC
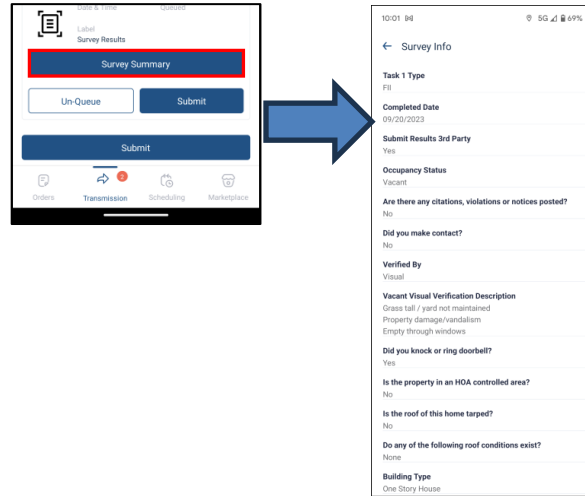
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