



# Safeguard Mobile – Completing an Order

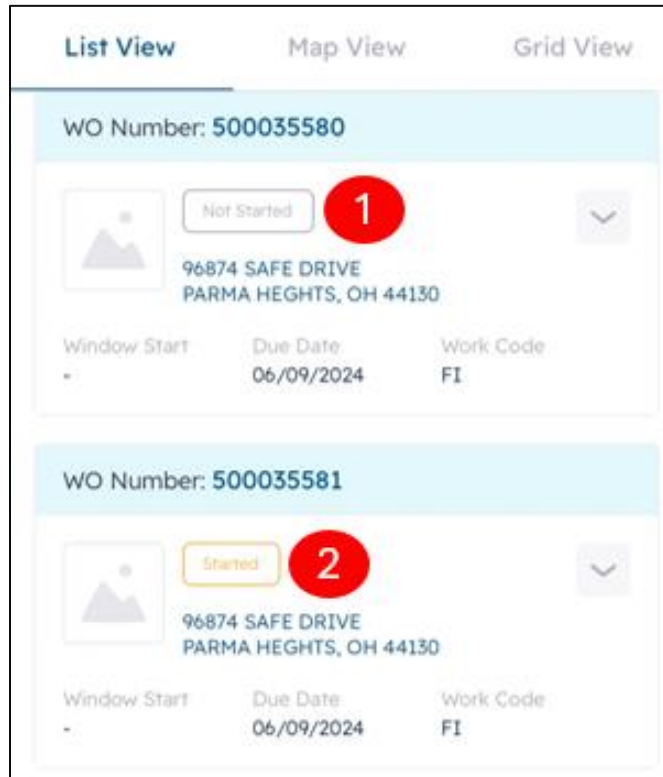
This user guide details how to complete an order in the Safeguard Mobile App. The work order script defaults to show all questions on one scrolling page. You do not need to go to a separate page/screen for each question.

## Completing an Order

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

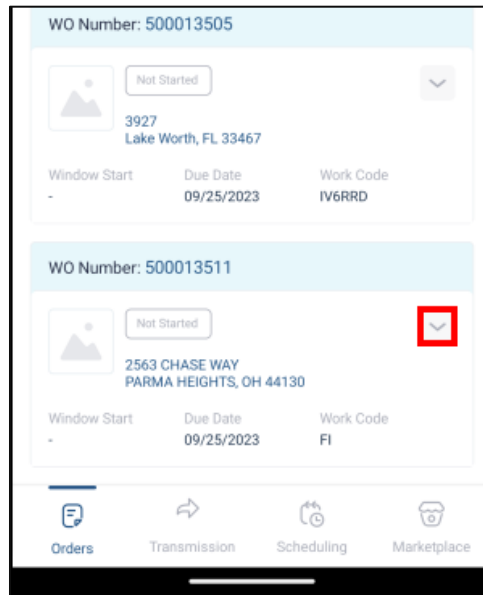
If you have not started the order, then it shows as Not Started (1).

If you have started the order, then it shows as Started and is outlined in Orange (2).

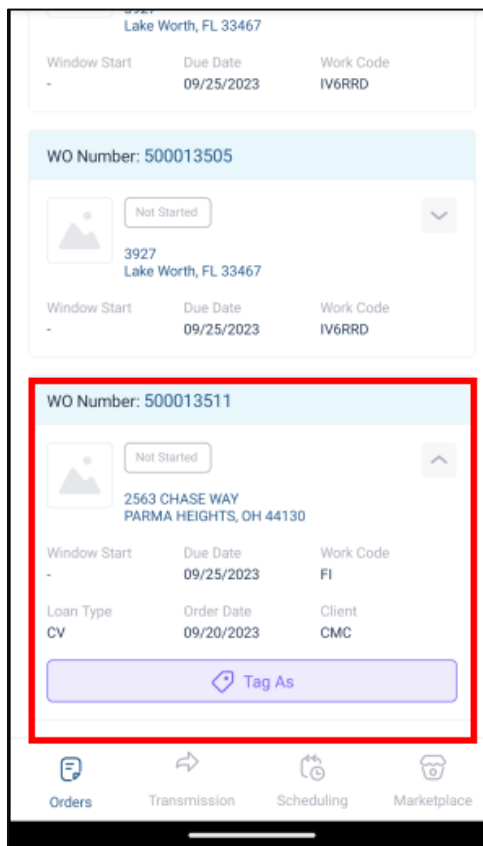


The screenshot displays the 'List View' of the Safeguard Mobile app's 'Orders' page. At the top, there are three tabs: 'List View', 'Map View', and 'Grid View'. Below the tabs, there are two work order cards. The first card is for 'WO Number: 500035580' and has a 'Not Started' status, indicated by a red circle with the number '1'. The second card is for 'WO Number: 500035581' and has a 'Started' status, indicated by a red circle with the number '2'. Both cards show the address '96874 SAFE DRIVE, PARMA HEIGHTS, OH 44130' and a 'Due Date' of '06/09/2024'. The 'Work Code' for both is 'FI'. The 'Window Start' is marked with a minus sign (-).

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



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

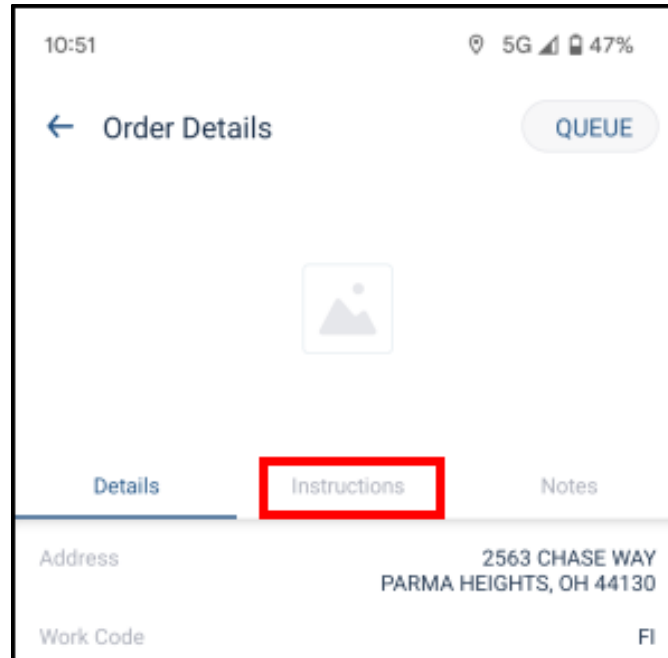


The Order Details page displays and shows basic information about the property or the work order. It also allows you to access the various photo features and to start the work order.

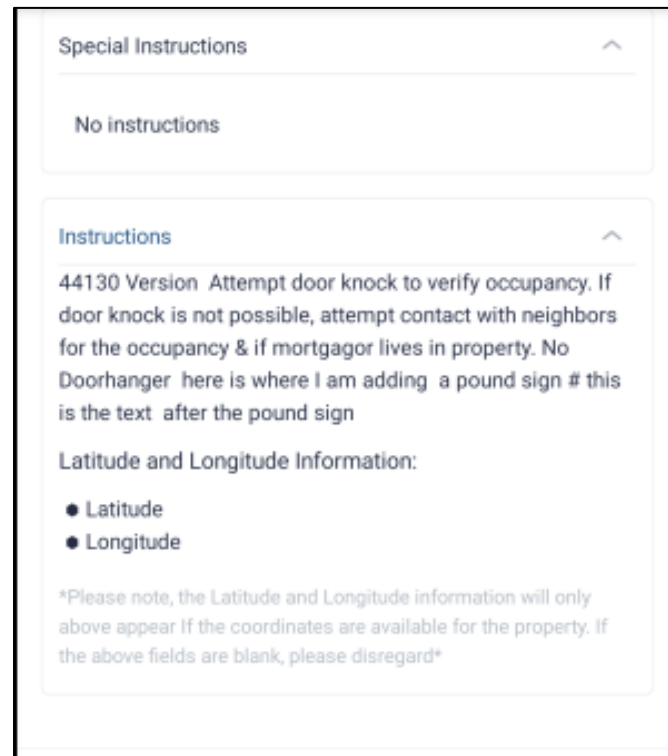
1. A **QUEUE** button that sends an order to the transmissions page.
  - It remains grayed out until all required information and photos have been provided.
2. A front of house image if a work order has been previously completed at the location.
3. Tabs allow access to details and instructions.
  - For some orders, the following tabs may also be visible:
    - i. Scope Docs
    - ii. Scheduling
    - iii. Links
4. The property address.
  - The address is a link that opens the mapping program on your mobile device.
5. The work code.
6. The client code/name.
7. The work order's due date.
8. The lockbox code if an interior inspection.
9. The mortgagor's name.
10. The work order number.
11. The order date.
12. The last reported occupancy status, if available.
13. The appointment set date for IL and ISO orders.
14. Work Order Hash
  - Must be turned on in Settings.
  - Allows IT to know what version of the script is being used.
15. Camera, photo and virtual badge features.
16. The work order **START** button.
17. The app's version number.



2. Tap the **Instructions** tab to view the work order instructions.

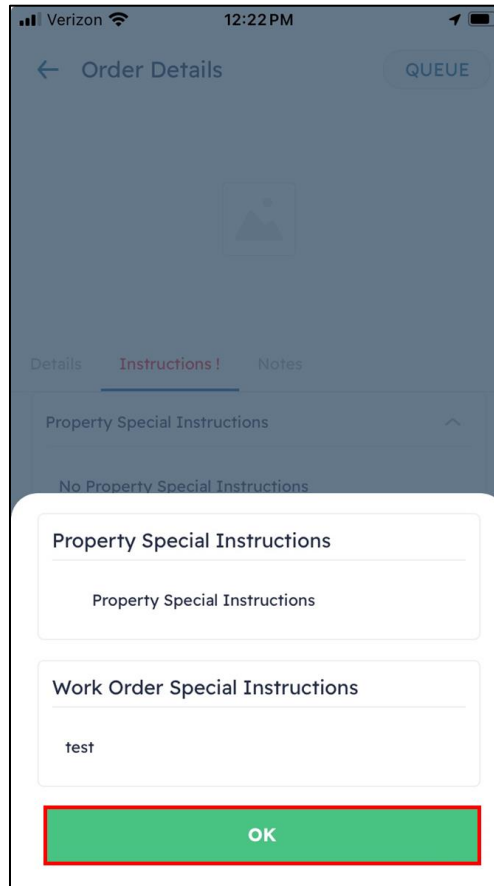


The instructions for the work order display.

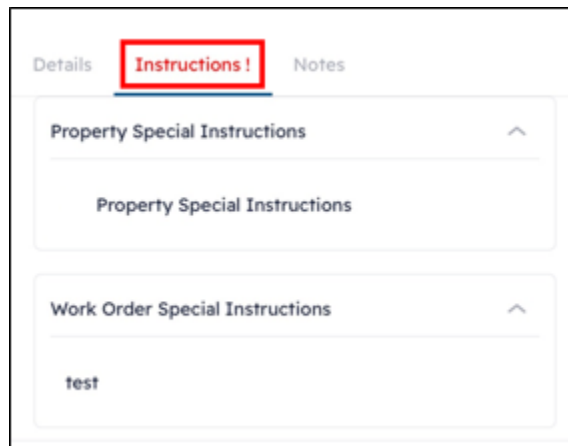


**Please note:** If there are special instructions, the **Instructions** page appears first when accessing the order.

Tap the **OK** button after reading the special instructions.

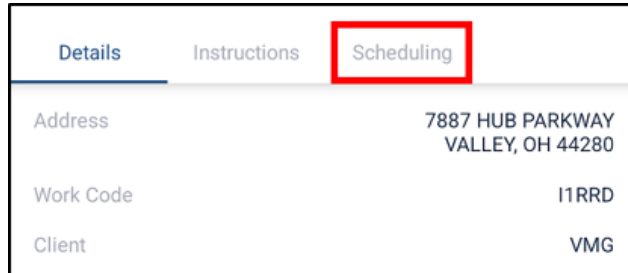


The Instructions tab shows as **Instructions !**



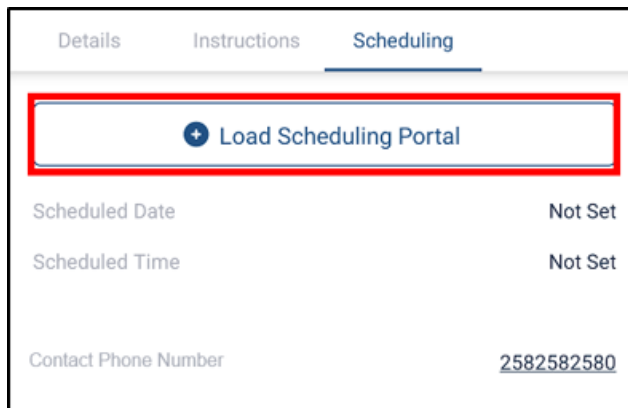
For ISO and Insurance Loss orders, a **Scheduling** tab displays.

- Tap the **Scheduling** tab.



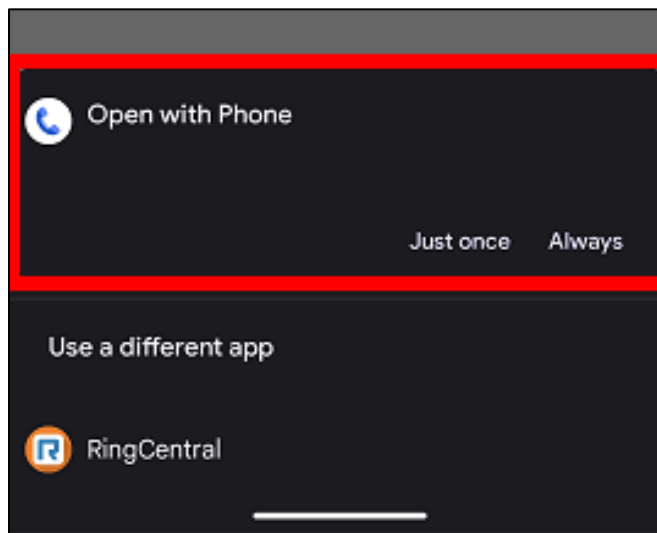
Details	Instructions	Scheduling
Address 7887 HUB PARKWAY VALLEY, OH 44280		
Work Code I1RRD		
Client VMG		

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



Details	Instructions	Scheduling
+ Load Scheduling Portal		
Scheduled Date Not Set		
Scheduled Time Not Set		
Contact Phone Number 2582582580		

**Please note:** You can tap the Contact Phone Number and dial the contact directly from the Scheduling tab without having to leave the Safeguard Mobile App.



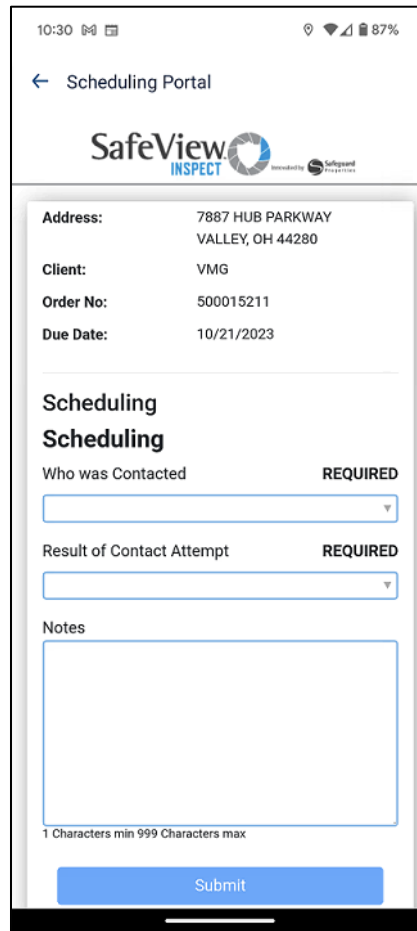
Open with Phone

Just once Always

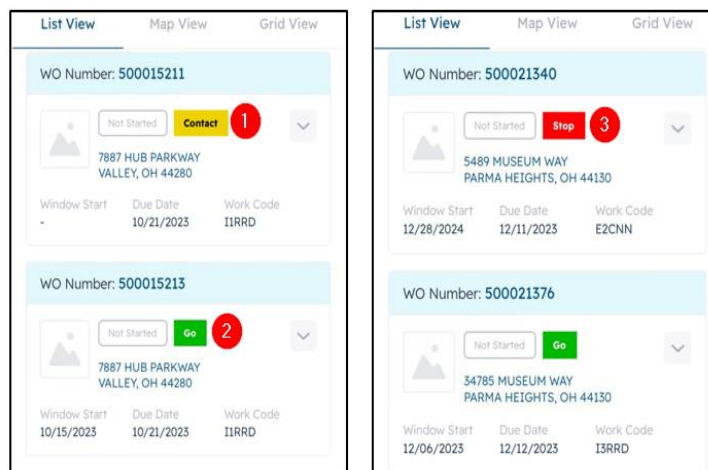
Use a different app

RingCentral

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

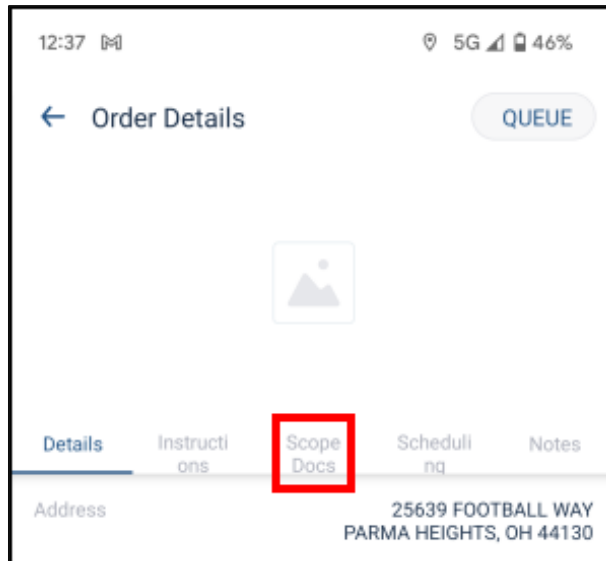


Contact (1), Go (2), and Stop (3) icons also display for these work orders on the Orders page.



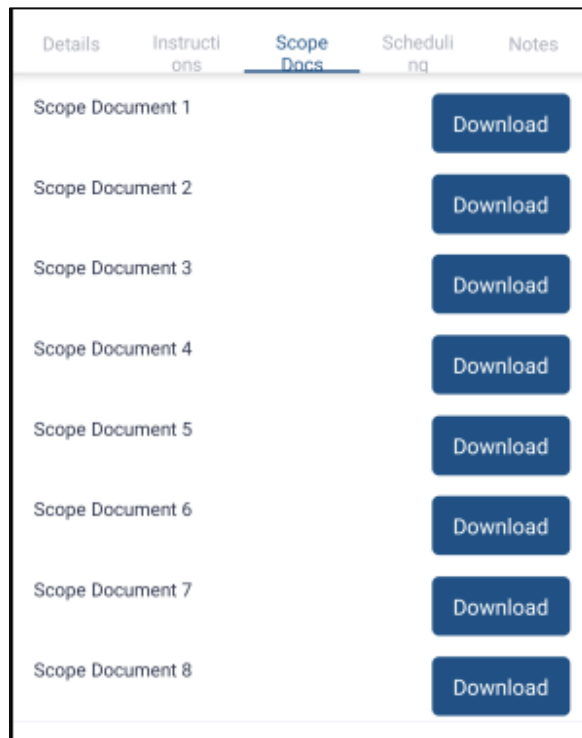
If the IL order has scope documents, then a **Scope Docs** tab is also visible.

- Tap the Scope Docs tab.



The **Scope Documents** page displays.

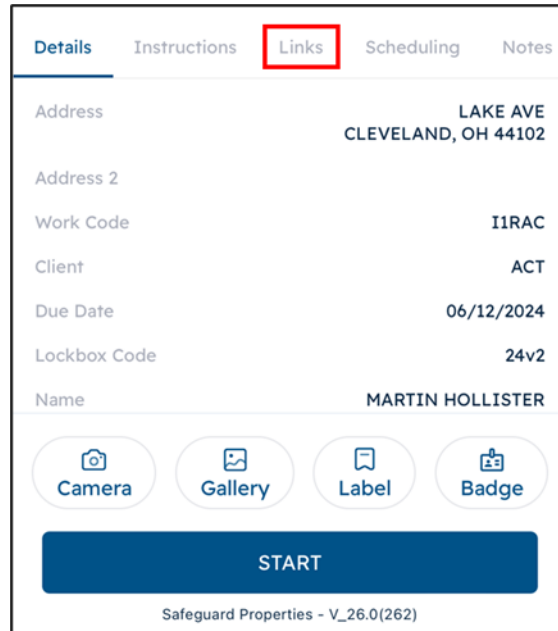
- Tap the **Download** button to download the necessary documents.





Some orders may contain a **Links** tab that provides access to an outside website that is necessary to complete an order.

- Tap the Links tab.



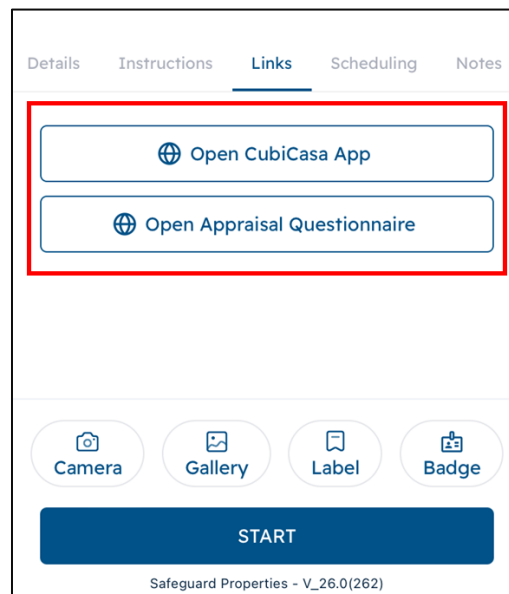
The screenshot shows the Safeguard Properties app interface. At the top, there are five tabs: Details, Instructions, Links, Scheduling, and Notes. The 'Links' tab is highlighted with a red box. Below the tabs, the following information is displayed:

- Address: LAKE AVE, CLEVELAND, OH 44102
- Address 2:
- Work Code: I1RAC
- Client: ACT
- Due Date: 06/12/2024
- Lockbox Code: 24v2
- Name: MARTIN HOLLISTER

Below the information, there are four circular icons: Camera, Gallery, Label, and Badge. At the bottom, there is a large blue button labeled 'START' and the text 'Safeguard Properties - V\_26.0(262)'.

The Links page opens.

- Tap the respective links to be taken to the necessary third-party sites to complete the order.



The screenshot shows the Safeguard Properties app interface with the 'Links' tab selected. Two links are highlighted with a red box:

- Open CubiCasa App
- Open Appraisal Questionnaire

Below the links, there are four circular icons: Camera, Gallery, Label, and Badge. At the bottom, there is a large blue button labeled 'START' and the text 'Safeguard Properties - V\_26.0(262)'.

The Safeguard Mobile app can open the mapping program on your phone as needed.

- Tap the **Address** to activate the mapping program on your phone.

Details	Instructions	Notes
Address	6218 PEARL ROAD PARMA HEIGHTS, OH 44130	
Work Code	FI	
Client	RRR	
Due Date	05/18/2024	
Lockbox Code	5132	
Name	DALE KINGSTON	
Order Number	500034308	
Order Date	05/13/2024	

- Tap **Yes** to grant allow Safeguard Mobile to access your mapping program.
  - In the example below, the latitude and longitude are provided as the location of the property.
  - If for some reason the latitude and longitude are not available, then the property address is listed instead.

Details	Instructions	Notes
Address	6218 PEARL ROAD PARMA HEIGHTS, OH 44130	
Work Code	FI	
Client	RRR	
Due Date	05/18/2024	
Lockbox Code	5132	
Name	DALE KINGSTON	
Order Number	500034308	
Order Date	05/13/2024	
Occupancy Status	-	
Appointment Set	-	

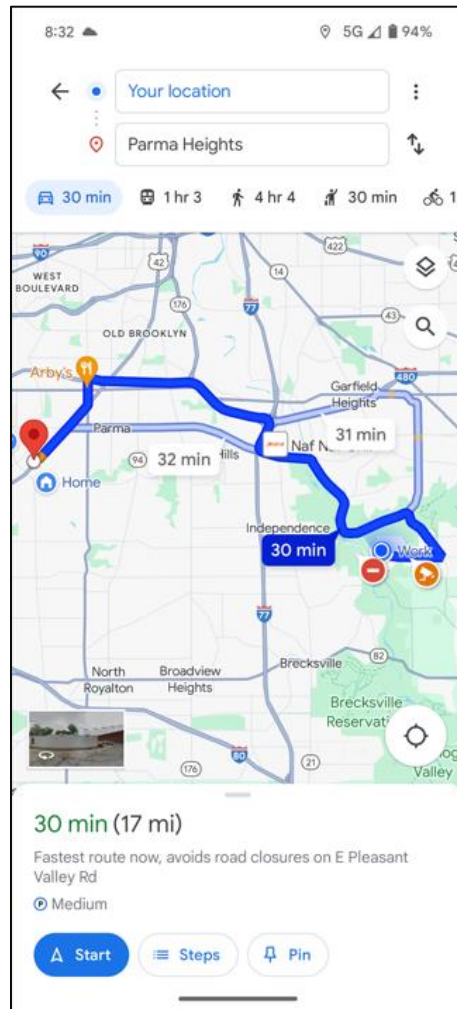
**Navigation**

Do you want to open your map app to navigate to this property?

Lat: 41.39286  
Long: -81.76056

**YES** NO


The mapping app on your mobile device opens and shows the directions to the property.





To complete a work order:


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

Due Date	06/09/2024
Lockbox Code	24v2
Name	ABIGAIL MITCHELL
Order Number	500035580

  
 Camera

  
 Gallery

  
 Label

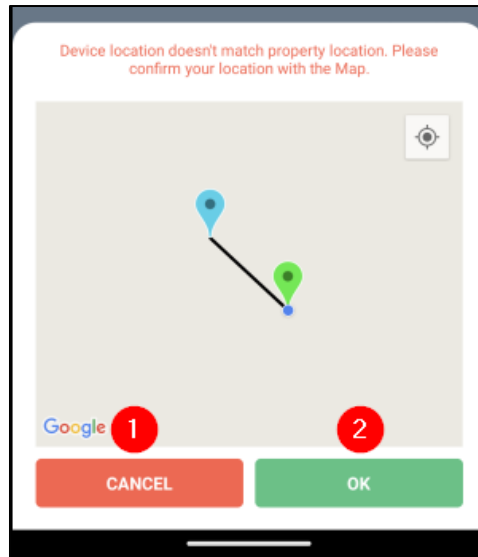
  
 Badge

**START**

Safeguard Properties - V\_26.0(262)

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.

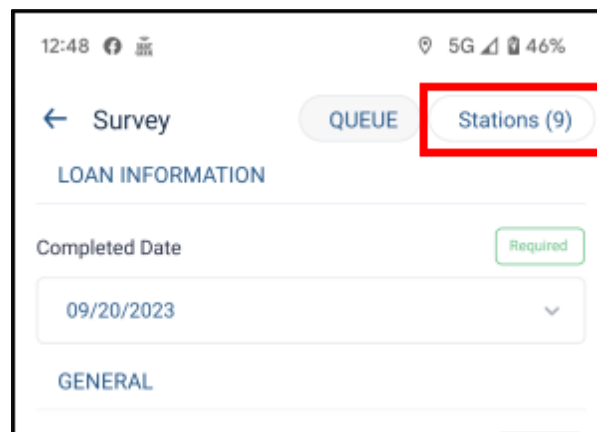
- Tap the **CANCEL** button if you believe you are at the incorrect location.
- Tap the **OK** button if you are at the correct location and wish to continue with the order.



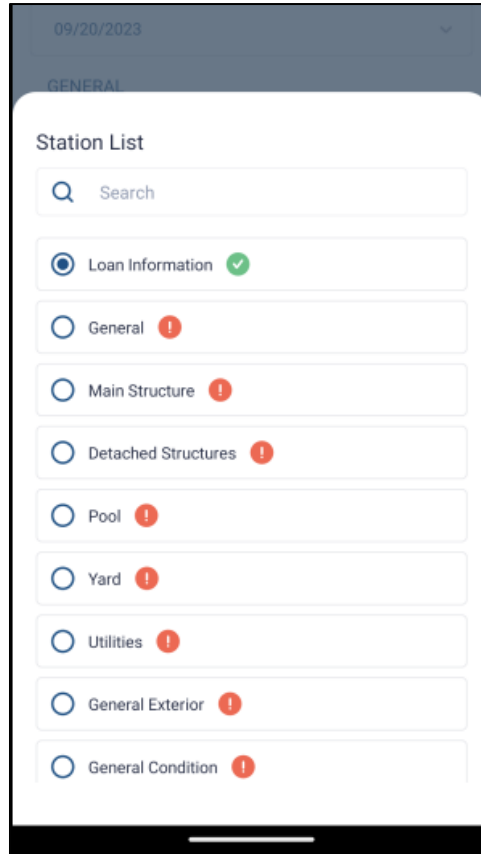
The **Survey**, or work order script, page displays. The page defaults to show questions that are required to complete the script. Additional questions may be added depending on how other questions are answered. The questions themselves are grouped together by station. A station is a group of questions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

### Stations

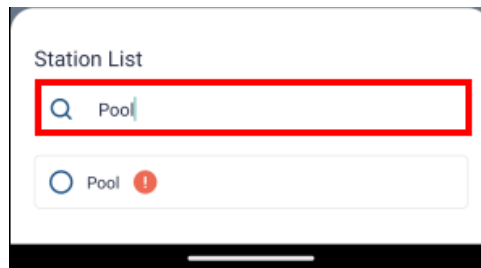
Tap the **Station** button on the upper right side of the page to see a preliminary list of stations.



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 the required photos for that station.

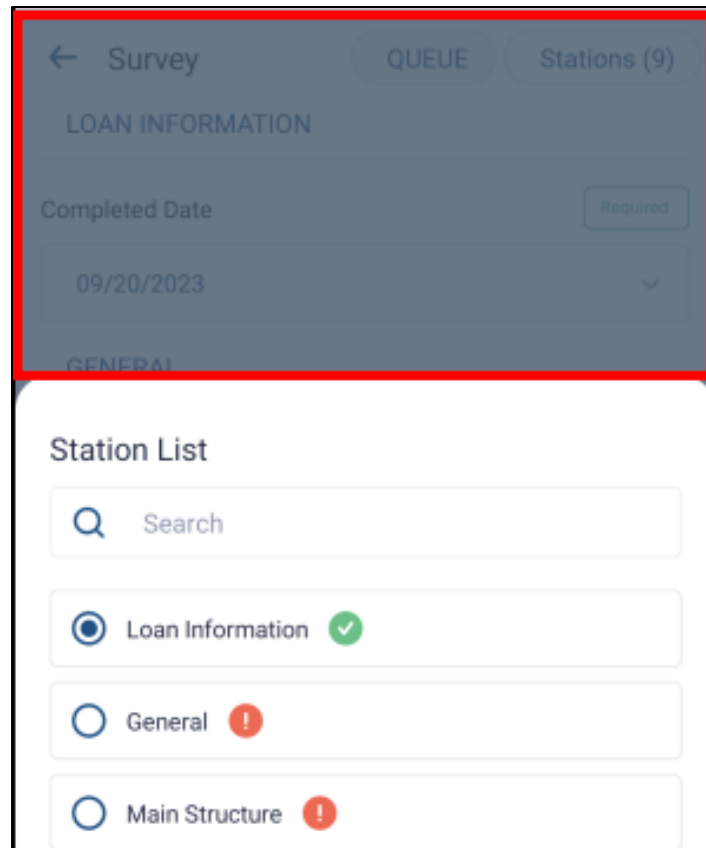
☒ Loan Information ✓

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.

☐ Main Structure !

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.

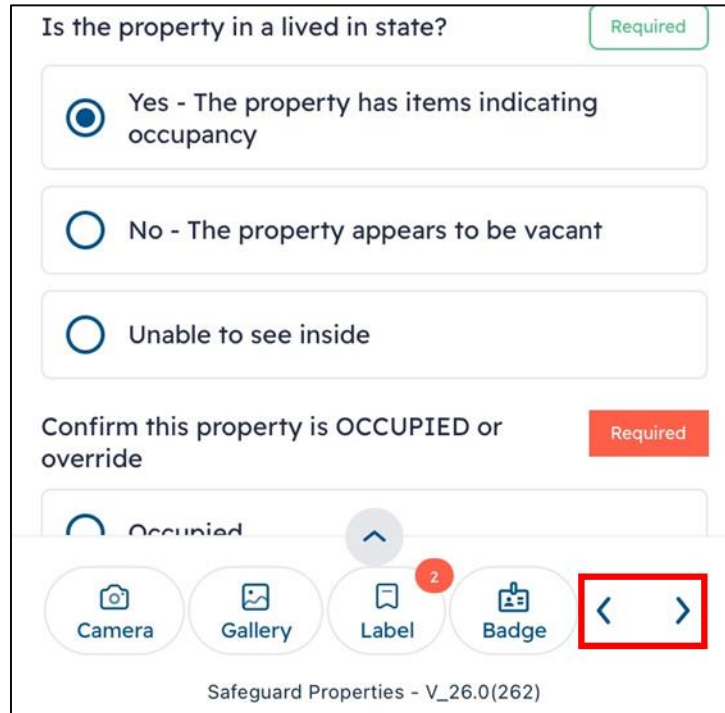


The screenshot shows the Survey app interface. At the top, there is a navigation bar with a back arrow, the word "Survey", and buttons for "QUEUE" and "Stations (9)". Below this is a section titled "LOAN INFORMATION" which includes a "Completed Date" field with a dropdown menu showing "09/20/2023" and a "Required" label. Below the "LOAN INFORMATION" section is a "Station List" section. The "Station List" section has a search bar and three items: "Loan Information" with a green checkmark, "General" with a red exclamation mark, and "Main Structure" with a red exclamation mark. The "Loan Information" item is selected, indicated by a blue dot in the radio button.

Tapping the left and right arrows at the bottom of the page also takes you from station to station.

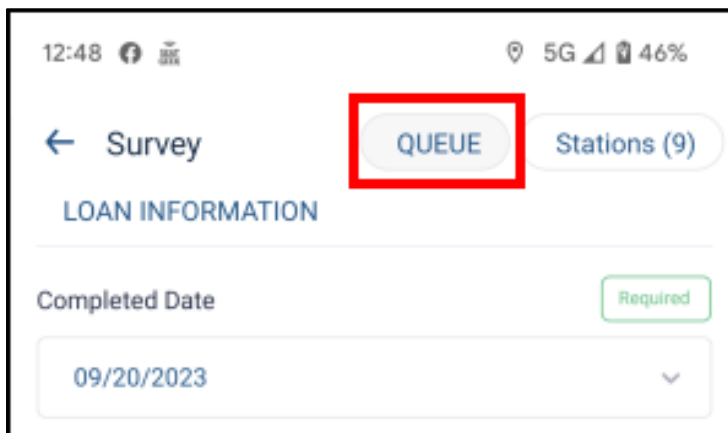
Tap the left arrow to be taken to the previous station.

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



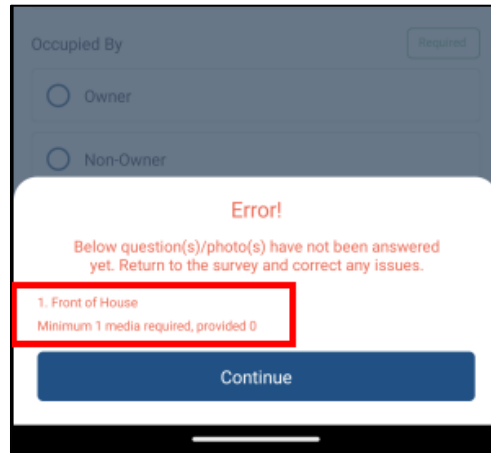
### Queue Button

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.

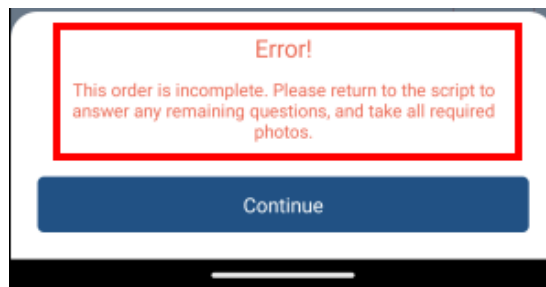


If you tap the QUEUE button before all the required information has been provided, an error message displays at the bottom of the page.

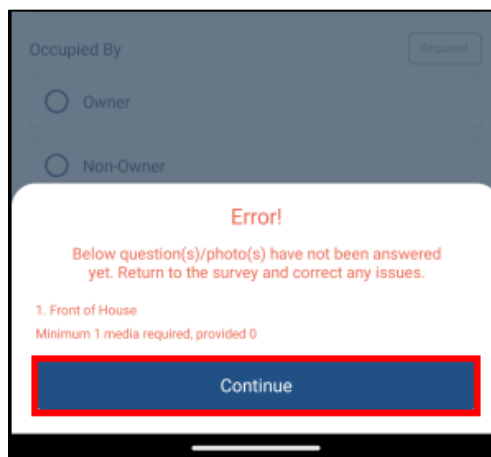
The message details what information is required for the order to be considered as complete.



The error message displays up to ten items. If the order has more than ten, then a generic message is shown instead.



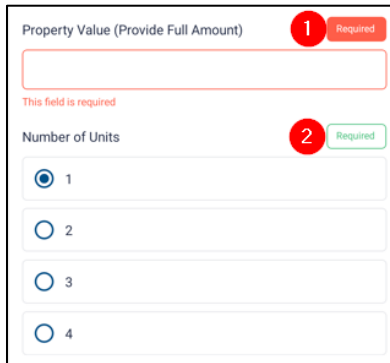
Tap the **Continue** button to return to the Survey page.



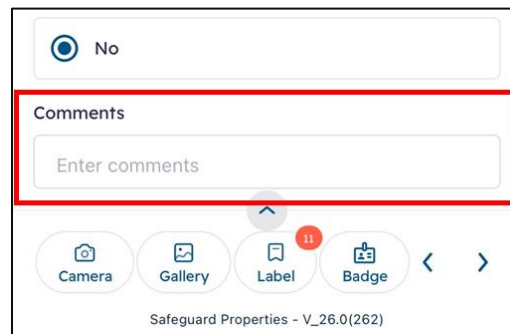


### Answering Questions in the Script

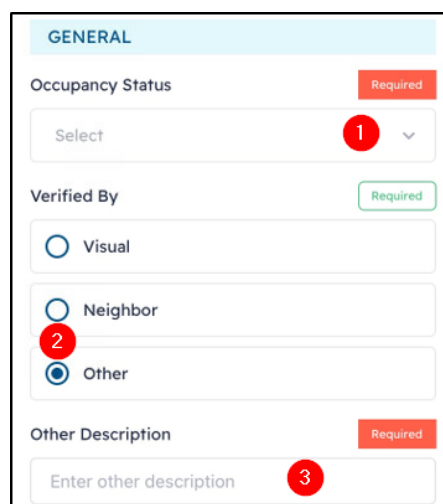
If the question is required and unanswered in the script, a red **Required** box appears on the right side of the page next to that question (1). Once the question is answered that box turns from red to green (2).



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).

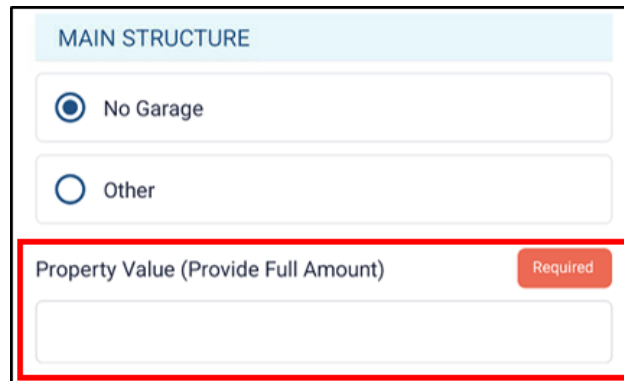


1. Answer all questions in the script.
2. Scroll down the page as needed to see additional questions.

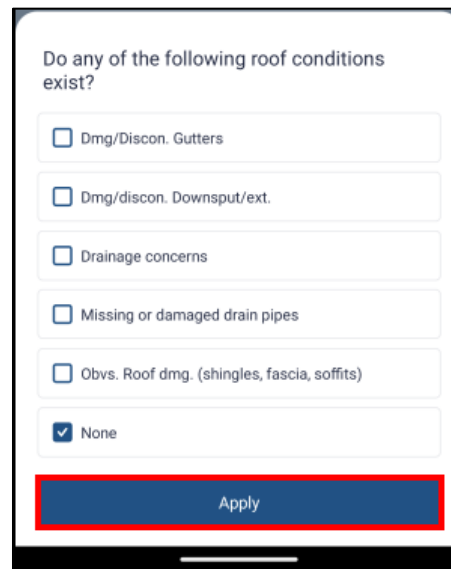
Some questions may already be pre-populated with answers.

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.

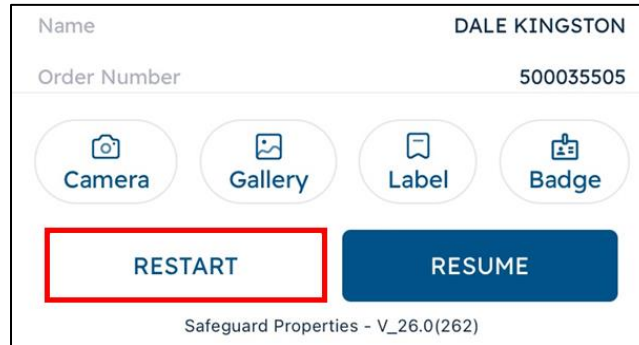


4. Tap the **Apply** button after making your selections if the question allows multiple answers. You may need to scroll within the list of answers depending on the number of options provided.



If you exit out of the order before it is finished or before it is queued, then you have options to either **RESTART** it or to **RESUME** it.

If the information provided in the update was inaccurate and you would like to clear all previous selections, then tap the **RESTART** button to start anew.



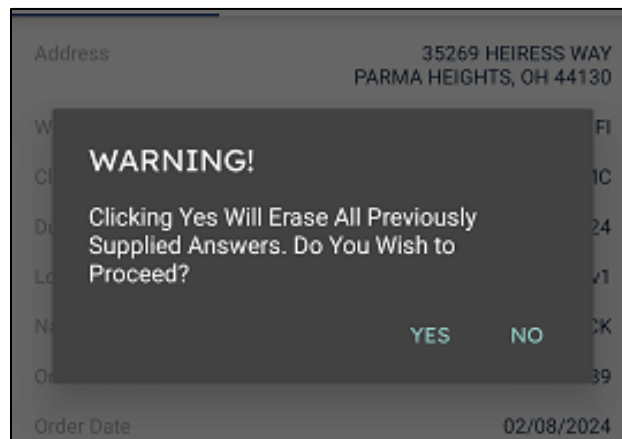
Name DALE KINGSTON  
Order Number 500035505

Camera Gallery Label Badge

**RESTART** RESUME

Safeguard Properties - V\_26.0(262)

If you select restart, then a warning appears asking if you are sure you want to proceed. Answer accordingly.



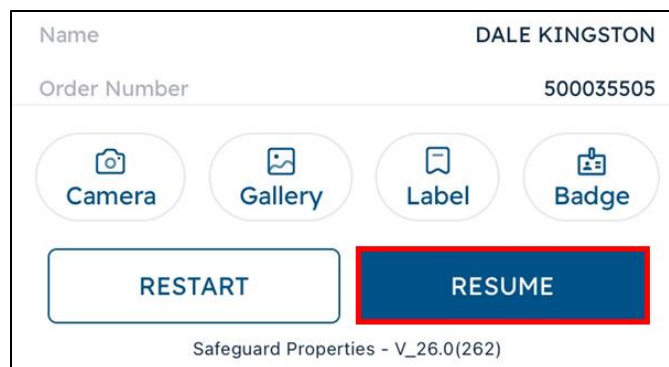
Address 35269 HEIRESS WAY  
PARMA HEIGHTS, OH 44130

**WARNING!**  
Clicking Yes Will Erase All Previously  
Supplied Answers. Do You Wish to  
Proceed?

YES NO

Order Date 02/08/2024

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.



Name DALE KINGSTON  
Order Number 500035505

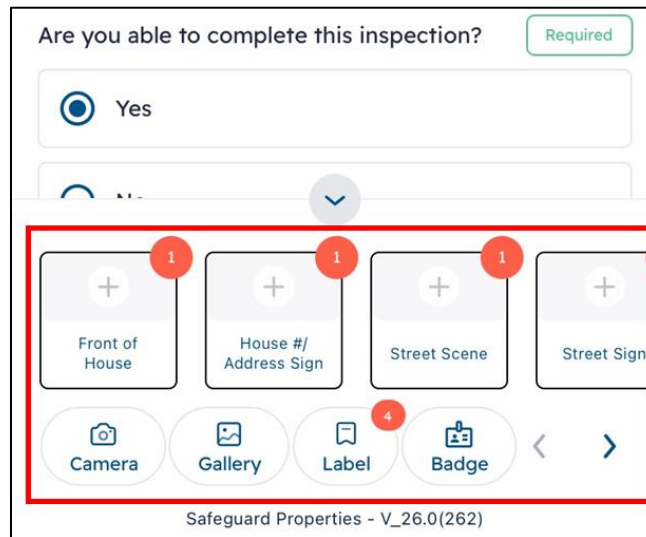
Camera Gallery Label Badge

RESTART **RESUME**

Safeguard Properties - V\_26.0(262)

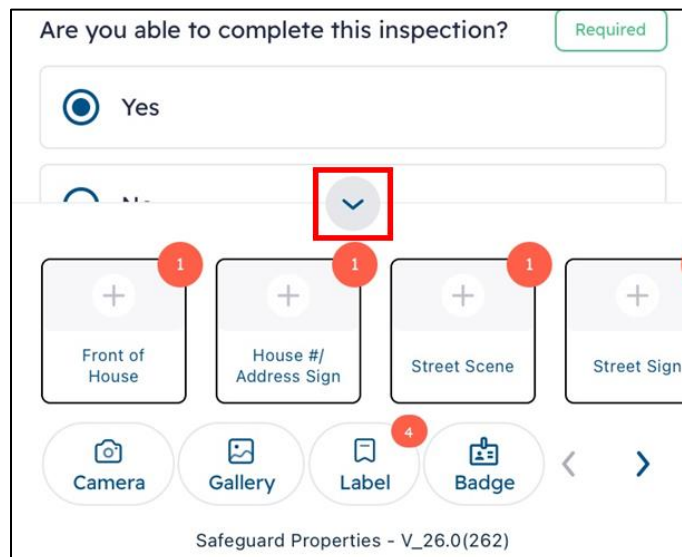
## Images

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.

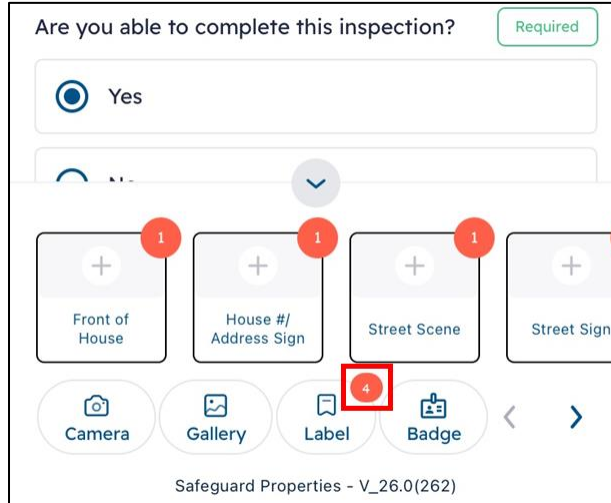


**Please note:** You can choose to have this carousel appear as collapsed or expanded through an option on the Settings page.

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 four (4) required images.



Are you able to complete this inspection? Required

☒ Yes

Front of House 1

House #/ Address Sign 1

Street Scene 1

Street Sign 1

Camera Gallery Label 4 Badge

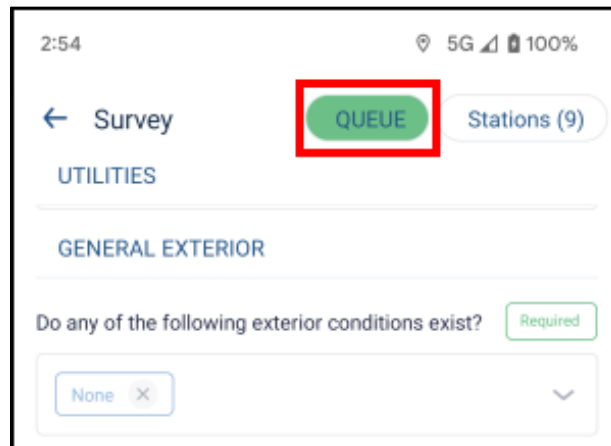
Safeguard Properties - V\_26.0(262)

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.



2:54 5G 100%

Survey **QUEUE** Stations (9)

UTILITIES

GENERAL EXTERIOR

Do any of the following exterior conditions exist? Required

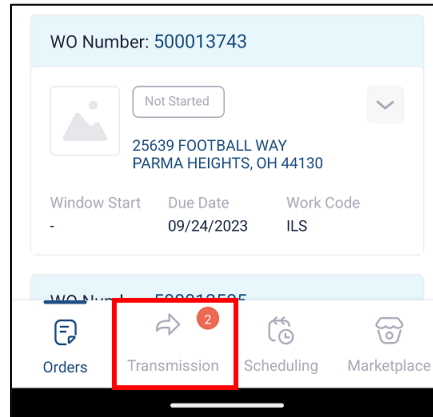
None X

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

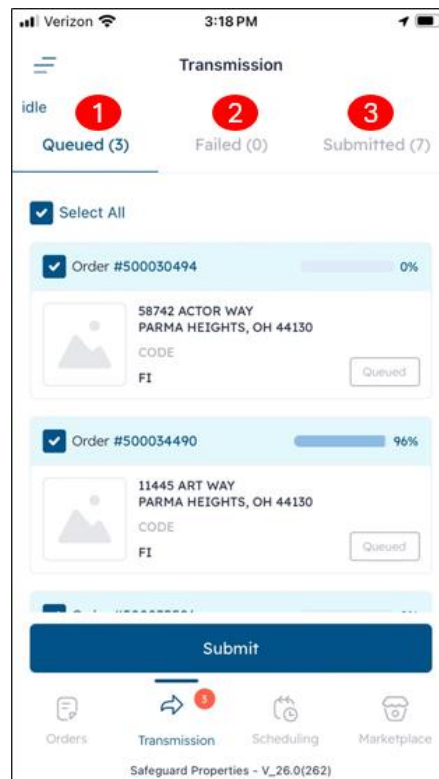
**Please note:** You do not need to transmit an order immediately after it is completed. This is especially true if you are in an area with limited connectivity and need to wait until there is better service.

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.

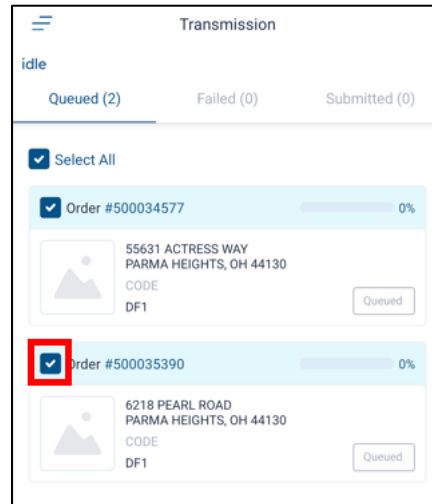


The Transmission page displays and defaults to show any orders pending transmission (1). There are tabs to see any orders that have failed transmission (2) and any that have already been submitted (3).

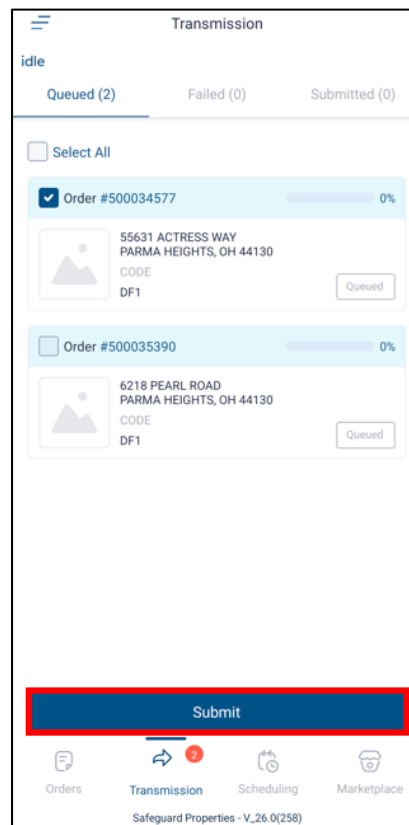


All the orders listed on the page are selected by default to be transmitted.

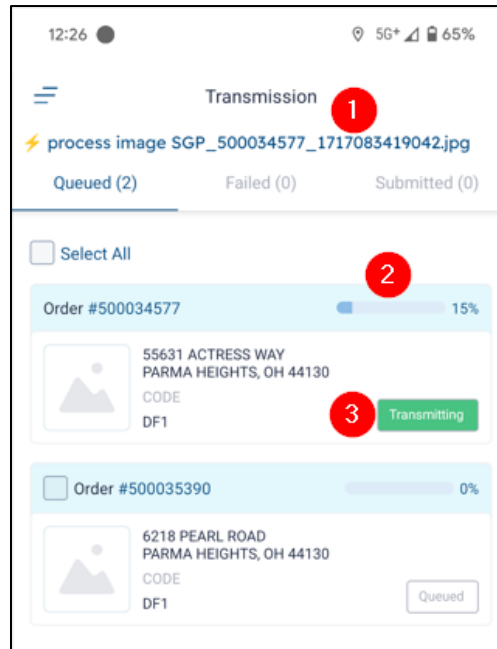
If for some reason you do not wish to transmit an order, then tap the checkmark next to the order number to de-select it.



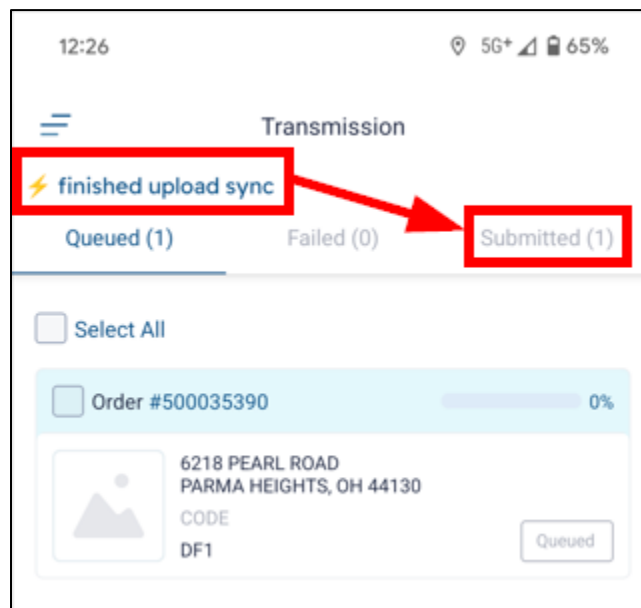
3. Tap the **Submit** button to transmit the remaining checked orders.



The image/information that is being transmitted is shown at the top of the page (1) and a progress bar shows what percentage of the transmission has been completed (2). While the order is being sent, the Queued button is changed to a green **Transmitting** button (3).



Once the transmission is completed, the top status shows as **finished upload sync**, and the order is then moved to the **Submitted** page.





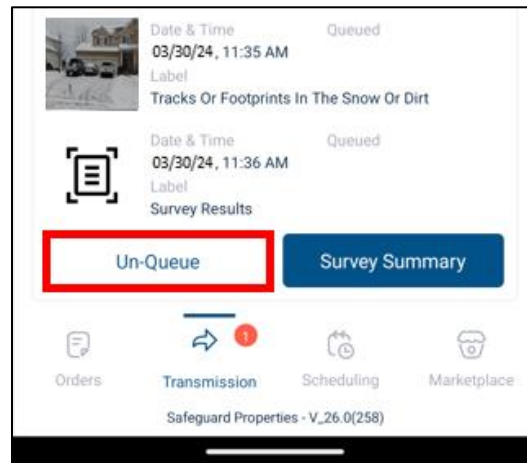
While unchecking an order stops it from being transmitted, it does not un-queue the order. An order can be un-queued by doing the following:

- Tapping the **Queued** button.

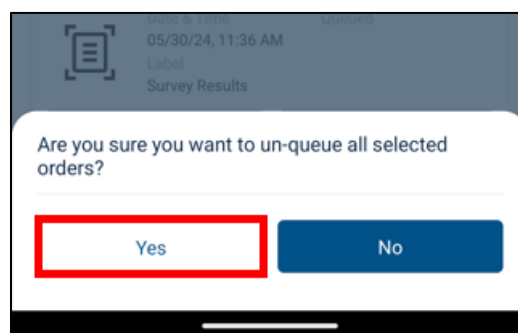


All the photos for the order display.

- 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.

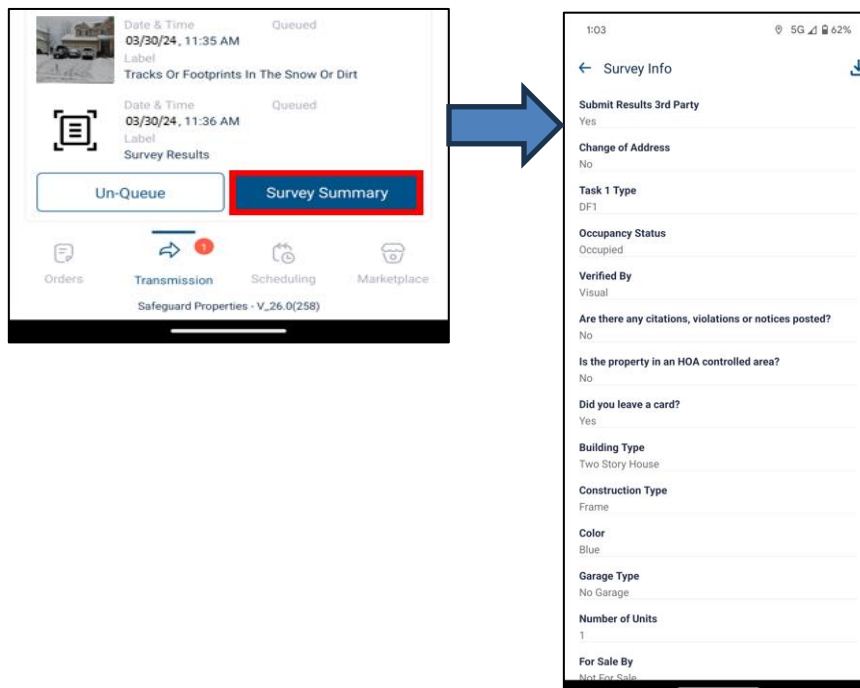


You are returned to the Transmission page, but the order that has been un-queued is no longer listed.

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:** You can only un-queue an order if it has NOT been transmitted. Once the order is transmitted, you can no longer un-queue it.

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



# Confidentiality Statement

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