Safeguard Mobile – Quick Guide

Table of Contents

Safeguard Mobile App System Requirements

Safeguard Mobile can run on any phone that supports the following operating systems:

Android: Version 10 or greater

iOS: Version 14 or greater

The Safeguard Mobile App can be found in the Google Play store for Android devices and the App Store for iOS devices.

The Mobile App may also be found through links provided by Safeguard.

Quick Log In: This allows you to log in to the application without having to do a full download of work orders. This is useful if you have to log out and back in while in the field with limited data connectivity.

Best Practice: Ensure you have a good data connection, log into the application prior to leaving for the day and download all work orders.
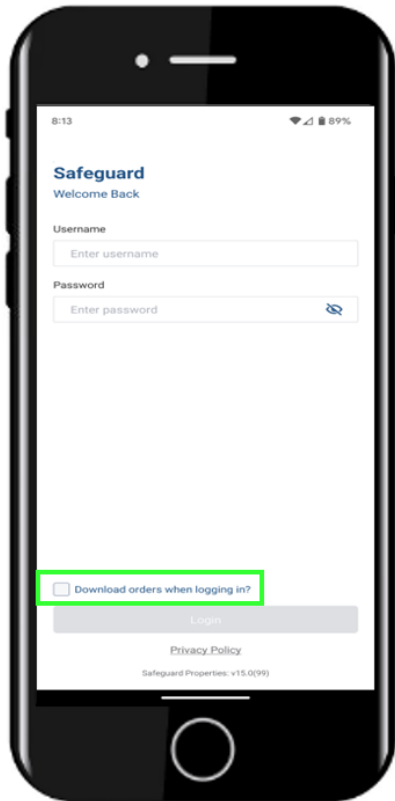

Download work orders turned off
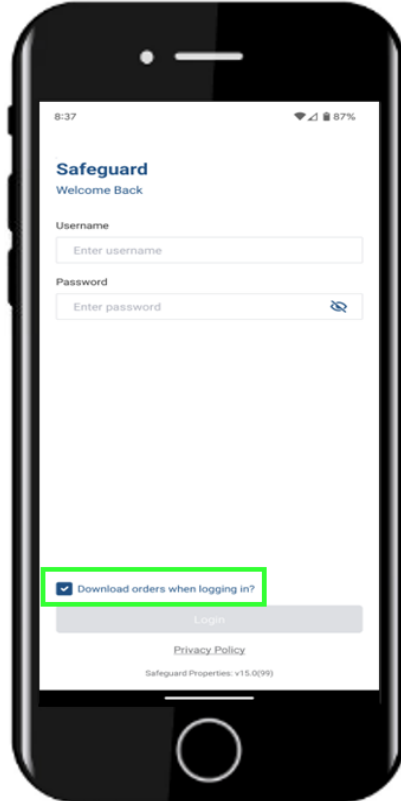
Download work orders turned on

A **Sync Status** dialogue box displays on the login page. This dialogue box allows you to see if the log in process encountered any issues.

Typically a green checkmark displays next to all of the processes that are listed. If any part of the login process fails, then a red X appears next to it.

If any process does fail, then you should contact the IT Help Desk. Tap the process that failed to see additional information. This provides additional information to the Help Desk and allows them to better assess the situation.

Tap either the **Continue** or **Retry** button based on the instruction provided to you.
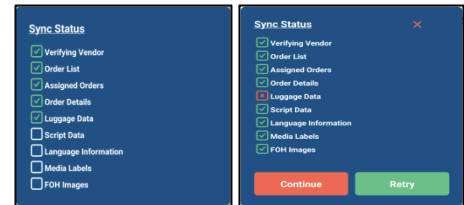
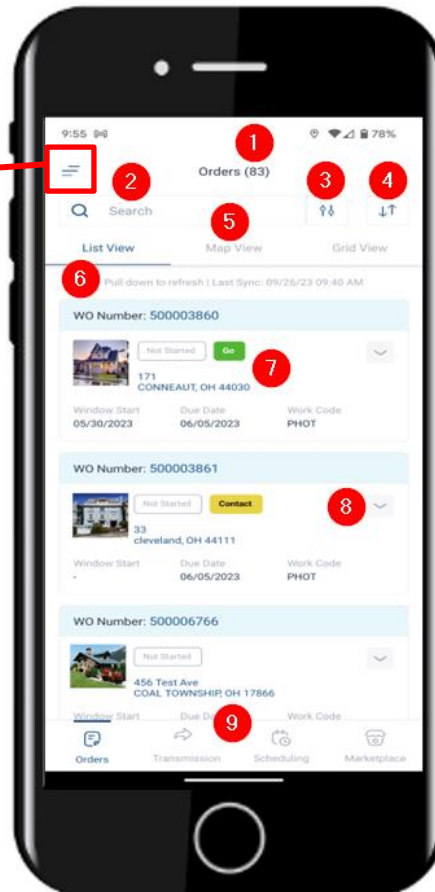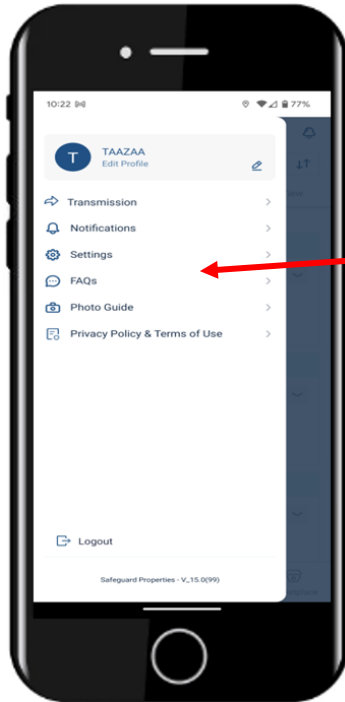### Logging in on a mobile device (Android or iOS)

1. Turn "On" to download all work orders.
2. Turn "Off" to simply log in to the application and access work orders that have ALREADY downloaded.

You can tap the Privacy Policy link to read the Safeguard Properties' privacy policy at any time.

The app's version number is also shown at the bottom of the login page.

The Main Order List is a view of all of the orders you have been assigned and provides access to the Transmission page, settings, search / sort and filter options.

Edit Profile: Allows you to update your signature, password and security question.

Transmission: Moves you to the Transmission page.

Notifications: Allows you to manage your notification settings.

Settings: Allows you to change and update numerous app settings.

FAQs: Allows you to view an app FAQ.

Photo Guide: Allows you to view an app photo guide.

Privacy Policy and Terms of Use: Allows you to read Safeguard's privacy policy.

Logout: Allows you to logout of the app.

1. **Orders:** Total number of orders in your order list.

2. **Search:** Ability to search on any text seen on the main order list.

3. **Filter:** Ability to filter the order list on numerous options, such as: client, work code, city, zip code, and order status.

4. **Sorted by:** Defaults to the oldest due date showing first. Tap the icon to reverse the sort.

5. **Orders page view:** Defaults to List View. Can change to a Map View or a Grid View.

6. **Date and time of last sync:** Shows the date and time the orders list was last synced or refreshed.

7. **Basic order information:** Shows the address, due date and work code. Also shows if the order has been started and if the order can be completed (for ISO orders shows Go or Stop).

8. **Dropdown arrow:** Tap the dropdown arrow to show additional order information, such as: Loan Type, Order Date and Client code.

9. **Page links:** Tap the icons to access the Orders page, the Transmission page, the Scheduling page or the Open Order Marketplace.

*Once you select a work order, you are taken to the **Order Details** page. On this page, you can view the property and work order details, see the front of the house photo, and access the camera, gallery, and photo labels pages. You can also access the scheduling hub, if needed, access scope of work documents if an insurance loss, see and add property notes, start the work order and queue the work order once it has been completed.*
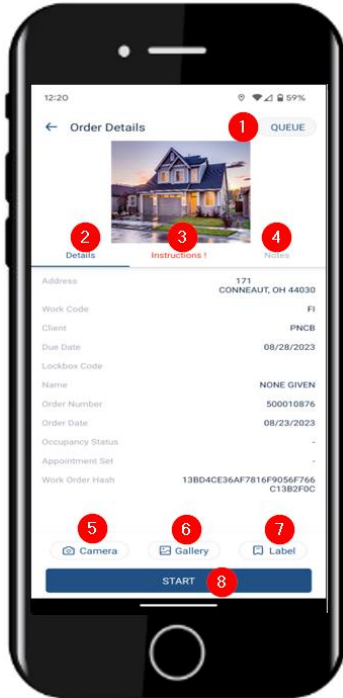
1. **QUEUE:** Allows you to queue the order for transmission. The button becomes available after the order has been completed.

2. **Details:** Shows you all the pertinent work order details.

3. **Instructions:** Shows you the work order instructions.

4. **Notes:** Shows and allows you create property notes.

A **Scheduling** tab and **Scope Docs** tab are available dependent on the work order type.

5. **Camera:** Allows you to access the camera.

6. **Gallery:** Allows you to Access the image gallery.

7. **Label:** Allows you to access the image label page.

8. **START:** Allows you to begin answering questions for the work order.
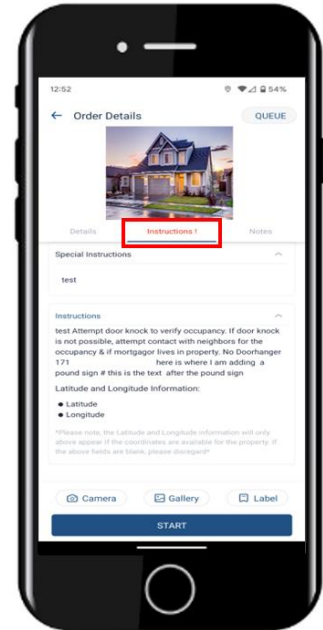
9. **RESTART:** Allows you to restart the work order. Restarting a work order clears out all responses and removes all photo labels.

10. **RESUME:** Allows you to resume answering the work order questions. All responses and photo labels are retained when the work order is resumed.

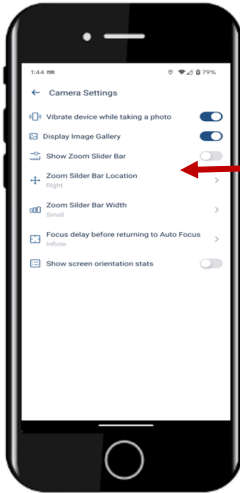Work order instructions

Safeguard Properties
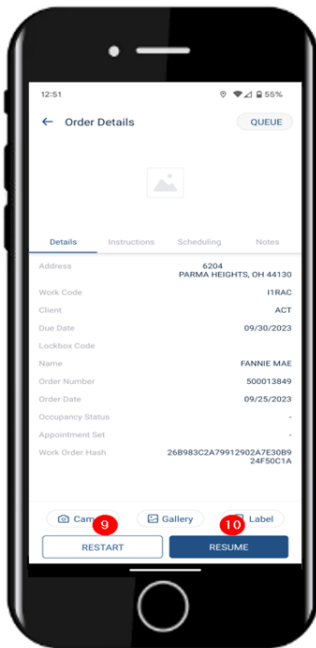
The camera option in Safeguard Mobile provides various options to you. Not only can you take and label photos, you can also adjust settings on an as needed basis. There is also a full camera and an in script camera. The functionality only varies slightly between the two.
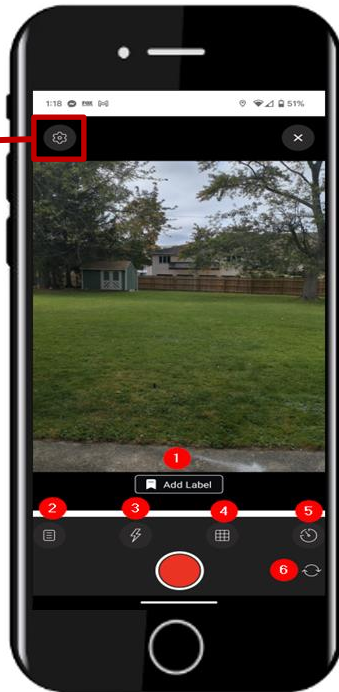
Full Camera

In script Camera

Selecting a photo label opens the camera and allows for immediate labeling.

1. **Add label:** Allows you to add an image label.
2. **Resolution Change:** Allows you to change the image resolution. Should be used when taking photos of documents.
3. **Flash:** Allows you to change the flash settings.
4. **Grid Lines:** Allows you the ability to add grid lines to the camera.
5. **Timer:** Allows you to set a timer when taking a photo.
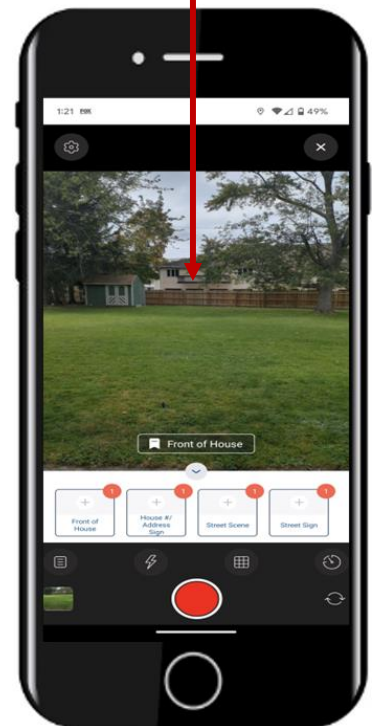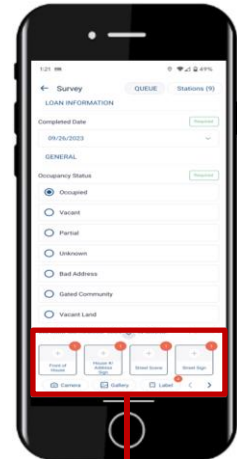6. **Front camera:** Allows to switch to the front camera if needed.

Camera Settings:

- Vibrate device while taking a photo
- Display Image Gallery
- Show Slider Bar
- Zoom Slider Bar Location
- Zoom Slider Bar Width
- Focus delay before returning to Auto Focus
- Show screen orientation status

The image gallery offers the end user a view of the photos that have been taken with the work order. It allows you to label, unlabel, and delete images.

1. **All:** Allows you to see all images associated with the order.

2. **Labeled:** Allows you to see only those images that have been labeled.

3. **Unlabeled:** Allows you to see only those images that are unlabeled.

4. **Down and Right arrow icon:** Allows you to adjust the size of the images on the Gallery page. Options are: Small, Medium and Large.

5. **Labeled image:** Labeled images are denoted by a blue tag icon.

6. **Select:** Allows you to select individual images or all images for labeling, un-labeling or deletion.

7. **Camera:** Allows you to open the camera and take photos if needed.
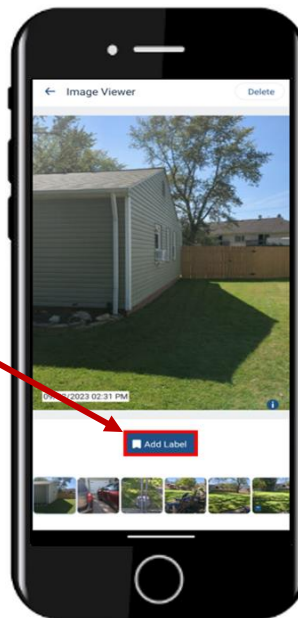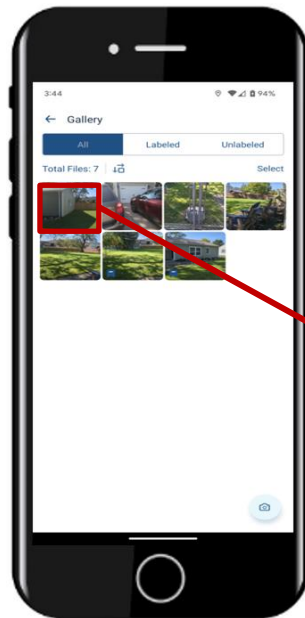
Tapping an unlabeled image takes you to the **Image Viewer** page where an **Add Label** button is available. The image can be labeled as needed.

Once you start a work order, the first page that you see is a Survey page. 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. There are settings that allow you to see just one question per page (Single Question) or just one station at a time (Survey View).

1. **QUEUE button:** Queues the order for transmission. It remains grayed out until all required questions and image labels are added to the order.
   - If you tap the QUEUE button while it is greyed out, then you receive an Error message advising you what information is needed for the order to be considered as completed.
   - Up to ten items can be listed.
   - If there are more than ten items needed, then a generic message displays.

2. **Station heading:** Identifies the station to which the group of questions belongs.

3. **Required icon:** Allows you to see if the question is required for the order to be completed. Once an answer is provided, the icon turns from red in color to green.
   - If no Required icon is present, then the question does not need to the answered.

4. **Script questions:** There are three basic types of questions:
   - Single select - Select the appropriate radio button.
   - Multi-select – Select multiple checkboxes if needed. May need to tap an Approve button when finished.
   - Fill in the blank – Free form short answer field.

5. **Pre-populated script answers:** Some answers are pre-populated. Review them for accuracy and change/update them as needed.

6. **Image Labels:** Selecting a photo label opens the camera and allows for immediate labeling.
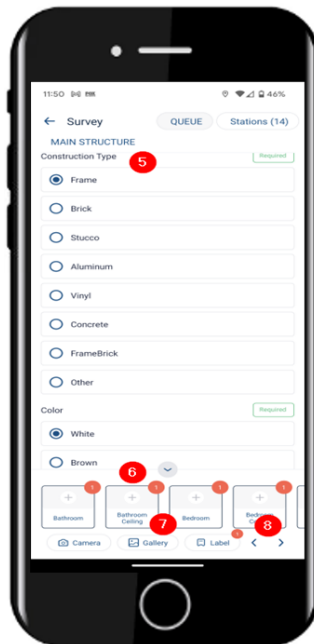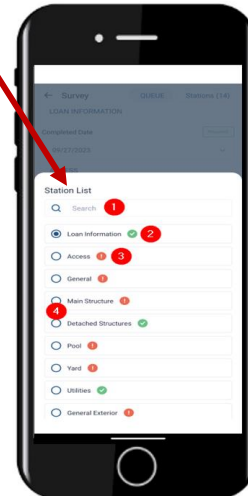
7. **Camera options:** Allows access to different image options in the Safeguard Mobile App.

8. **Left and right arrows:** Allows you to move between stations.
   - Left arrow takes you to the previous station.
   - Right arrow takes you to the next station.
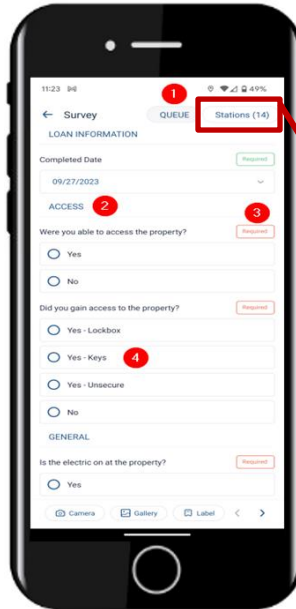
Station List Screen – The number of stations varies based on work order and even how questions are answered within the work order.

1. **Search:** Allows you to search for a specific station name in the provided list.

2. **Green circle, white checkmark:** Indicates that the station has been completed. All required questions and photos have been answered and provided.

3. **Red circle, white exclamation point:** Indicates that the station is incomplete. Questions may still need to be answered and/or photos may still need to be provided.

4. **Station name:** Tap the station name to be taken to that station in the script.

The Transmission page gives you full visibility to the photos and information before it is sent to Safeguard. The page also gives you the opportunity to un-queue an order, meaning that you can remove it from the Transmission page and place it back on the Orders page. All information is retained and changes can be made as needed.
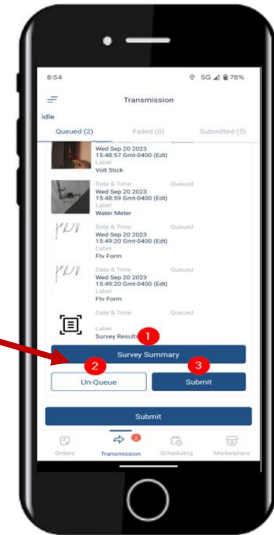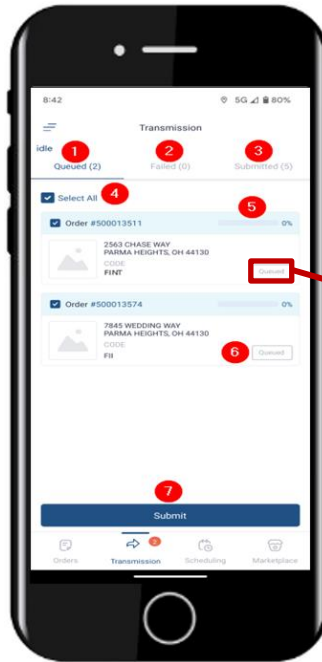
Tapping the **QUEUE** button when it is green sends the work order to the Transmission page.
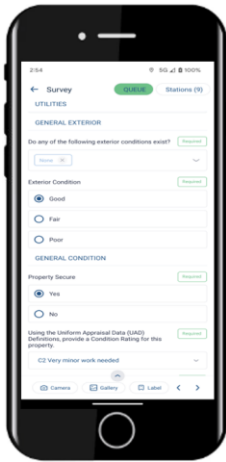
The number of orders pending transmission is shown next to the **Transmission** icon at the bottom of the page.
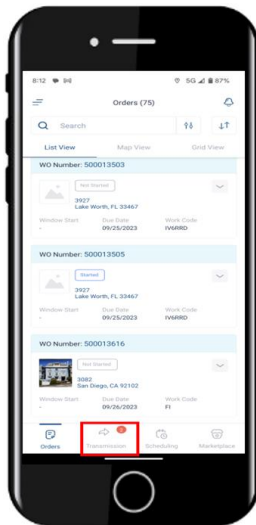

Tap the Transmission icon to access the Transmission page.

1. **Queued orders:** Allows you to see the orders that are queued for transmission. This page is shown by default.
2. **Failed orders:** Allows you to see any orders that have failed the transmission process.
3. **Submitted orders:** Allows you to see any orders that have been successfully transmitted to Safeguard.
4. **Select All:** Selects all orders on the page to transmit.
   - Tapping the checkmark to the left of the work order number de-selects it, meaning that it does not transmit.
5. **Progress bar:** Allows you to see what percentage of the work order has transmitted. This is always visible.
6. **Queued button:** Allows you to see all of the photos and results being submitted with the work order.
7. **Submit button:** Allows you to transmit all selected work orders to Safeguard.

1. **Survey Summary:** Shows a summary of the entire work order results.
2. **Un-Queue:** Allows you to un-queue the order. The order is placed back on the Orders page. You can resume the order and change information as needed.
3. **Submit:** Allows you to submit the order.

Survey Summary Example
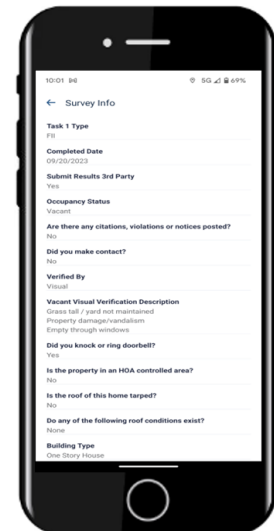
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