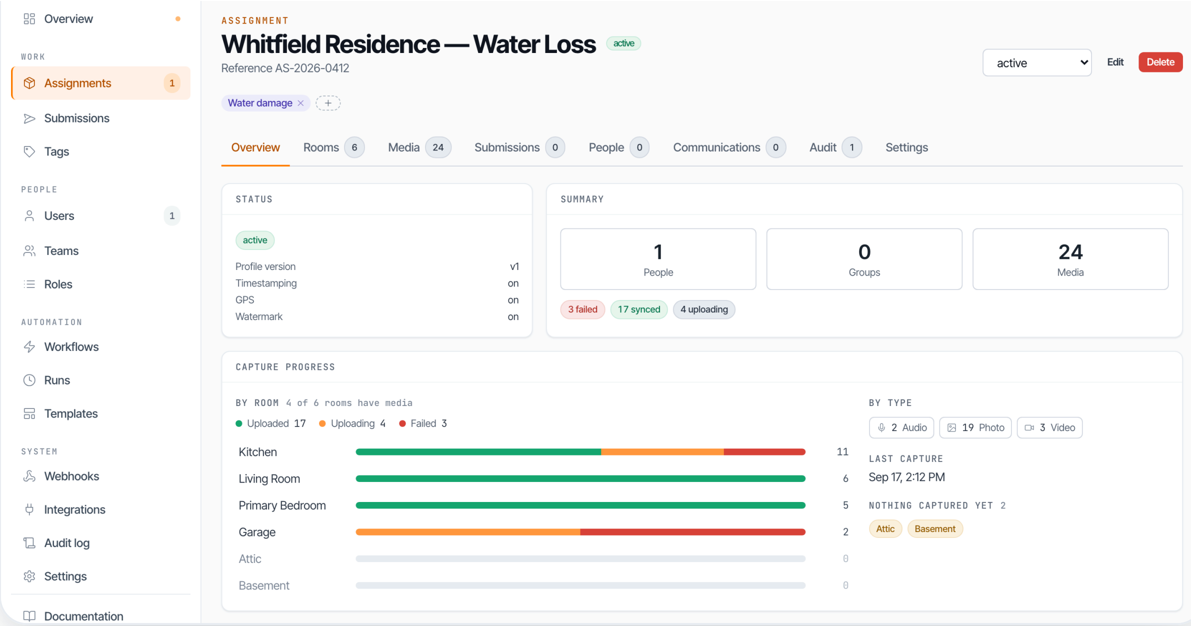

Contents Capture Admin Guide

Run loss documentation at scale, from team setup to locked, tamper-proof submissions.

Open the admin console

Download PDF guide

Get the iOS app

Organizations and teams

Structure your company as organizations, business units, and teams, with terminology that matches how you actually talk.

Capture profiles

Design the forms your adjusters fill in, publish them, and know that every assignment keeps its own locked snapshot.

Assignments at scale

Live Overview dashboard

Create one assignment with a wizard or a hundred from a spreadsheet, with members and access seated automatically.

Watch captures land in real time on a map, see who is active and who is idle, and drill into any adjuster's day.

Locked submissions

Every hand-off from the field is immutable. Review with deep zoom, clean originals, and full capture metadata.

Workflows and webhooks

Send emails and texts, update statuses, and notify your other systems automatically when something happens.

What this guide covers

This guide walks you through the whole admin console, from first sign-in to automation. Jump to what you need:

Section	What it covers
Sign in and access	Getting into the console and how access works
Roles and permissions	The six roles and exactly what each one can do
Structure and terminology	Organizations, business units, teams, and renaming nouns
Users and invitations	Adding users, deactivating, and assignment-level invites
Capture profiles	Building the forms adjusters fill in, drafts and publishing
Capture settings	Timestamps, GPS, watermarks, and snapshot rules
Assignments	The explorer, the creation wizard, and spreadsheet import
Assignment detail	Every tab: overview, rooms, media, submissions, people, audit, settings
Submissions and media	Reviewing locked hand-offs and the media browser
Tags	Labelling assignments, rooms, and media, and acting on those labels
Overview dashboard	Live field activity, the map, and grouping by person or job

Section	What it covers
Workflows	Event-driven automation with testing and run history
Message templates	Reusable email and SMS messages with version history
Webhooks	Pushing events to your own systems, signed and verified
Integration tokens	Read-only access keys for partner apps
Audit log	Who did what, when, and from where
Organization settings	Mobile app actions, visibility rules, and platform email/SMS
Field types	All fifteen capture profile field types
Event types	Every event that can trigger workflows and webhooks
FAQ	Answers to the questions admins actually ask
Glossary	Plain-language definitions of every term in the console

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A typical rollout

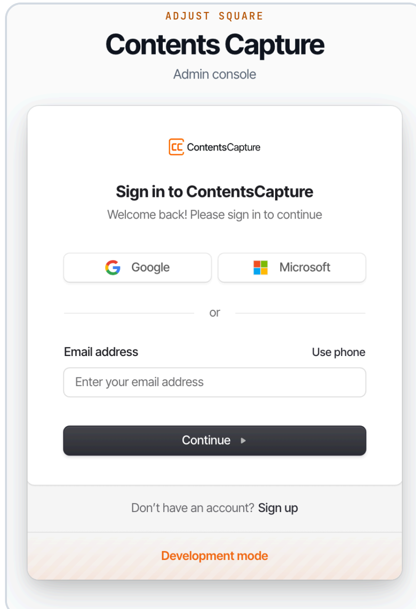
1. **Create your structure.** Set up your organization, business units, and teams so work is grouped the way your company runs. See **Structure and terminology**.
2. **Invite your people.** Add adjusters and leads with their role. They can sign in right away. See **Users and invitations.**
3. **Build a capture profile.** Define the fields every assignment needs, then publish it. See **Capture profiles**.
4. **Set capture settings.** Decide on timestamps, GPS, and watermarks per team. See **Capture settings**.
5. **Create assignments.** Send jobs to the field one at a time or in bulk from a spreadsheet. See **Assignments.**
6. **Monitor the work.** Watch captures arrive live and check adjuster pace. See **Overview dashboard.**
7. **Review submissions.** Open locked hand-offs, zoom into the detail, and move assignments through your review statuses. See **Submissions and media.**

Where is the field app guide?

Field staff have their own separate Field Guide covering the iOS app: installing, signing in, capturing, and submitting. Point your adjusters there and keep this guide for the office.

Sign in

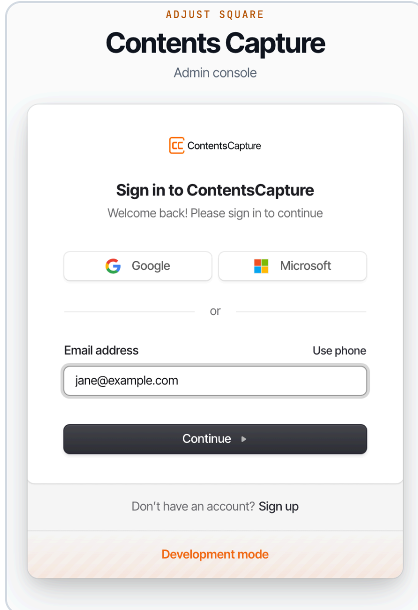
The admin console lives in your browser at **admin.contentscapture.com.** There is nothing to install.



How to sign in

Contents Capture is **sign-in only**. There is no "create an account" step: an administrator adds you first, and only then can you sign in. If you have not been added yet, signing in will tell you it cannot find your account.

1. Go to **admin.contentscapture.com.**
2. Enter the email address or phone number your administrator added you with.
3. We send you a short code. Enter it.



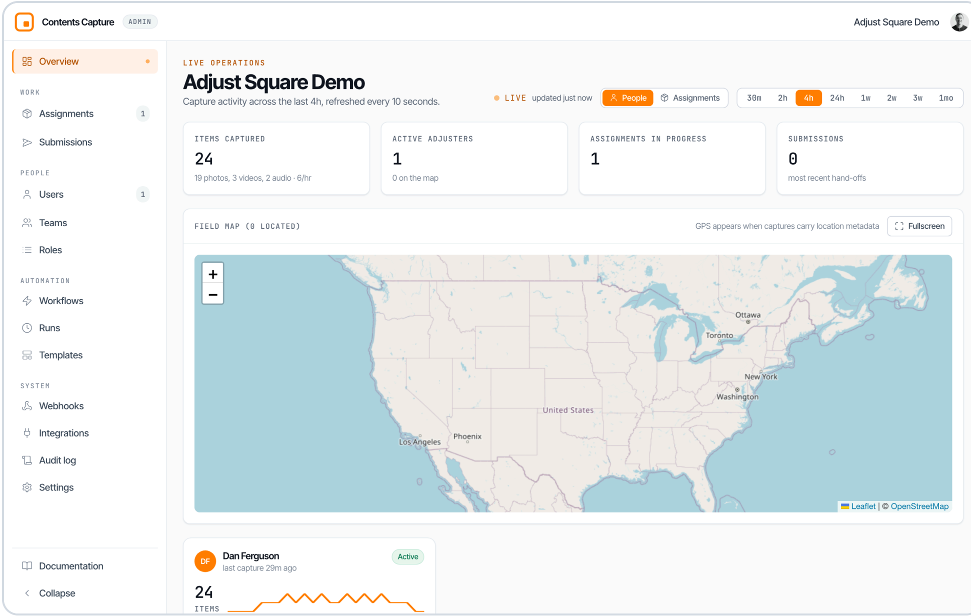
There is no password to remember or lose. Each sign-in uses a fresh code.

Use the same address every time

Your access is tied to the exact address you were added with. Signing in with a different one reaches a different account, usually an empty one.

What you see first

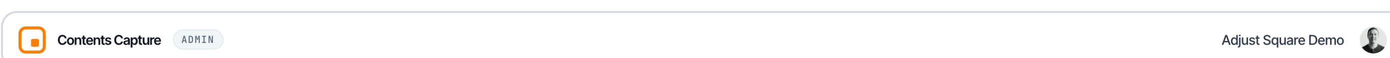
You land on **Overview**, the live picture of what your crews are doing right now.



How much of it you can see depends on your role. Field activity across the whole organization is limited to org admins; everyone else sees the rest of the page with that section hidden. See **Roles and permissions**.

Switching organization

If you belong to more than one organization, the switcher sits in the top right. Everything on screen follows it: assignments, users, submissions, settings.



Seeing "No organization" means your sign-in worked but no organization has been linked to it yet. That is an administrator's job, not something you can fix from here.

Signing out

Use the avatar menu in the top right.

If you cannot get in

- **"Couldn't find your account."** The address is not registered. Check for a typo, then ask your administrator which address they used.
- **The code never arrives.** Check spam for email. For phone, confirm the number is the one on file.
- **You sign in but see nothing.** You are signed in but not attached to an organization, or you have no assignments yet.

Still stuck? Email help@adjustsquare.com and a human will respond.

Roles and permissions

Every person in your organization holds exactly one of six roles, and the role decides what they can see and do across the console and the mobile app.

The six roles

Role	What they do
Org admin	Everything. Manages the organization, all business units and teams, users, profiles, assignments, workflows, webhooks, and integrations. The only role that sees org-wide field activity on the Overview dashboard, and the only one that can manage webhooks and integration tokens.
Business Unit admin	Everything an org admin can do, except managing webhooks and integration tokens. Typically runs a division or region.
Team admin	Runs teams day to day: manages team members, builds and publishes capture profiles, creates and manages assignments, grants assignment access, and reads the audit log. Often a team lead or desk adjuster supervisor.
Member	Captures media, works rooms and assignments in the field app, and views media. The standard role for field adjusters.
Collaborator	Same capture abilities as a member, but only on assignments they were specifically invited to. Ideal for contractors and outside adjusters.
Observer	View only. Can read media on assignments they are invited to, but cannot capture or change anything. Good for carrier representatives or managers who need visibility without access to capture.

The 14 permissions

Behind the scenes, each role is a bundle of permissions. The console enforces them server-side, so they cannot be bypassed.

Permission	Plain meaning
`team.manage`	Create, rename, and delete teams, and manage their members and settings.
`schema.manage`	Create, edit, publish, and archive capture profiles.
`assignment.create`	Create new assignments, including spreadsheet imports.
`assignment.manage`	Edit assignment details, change statuses, and delete assignments.
`assignment.access.grant`	Invite collaborators and observers to an assignment and revoke their access.
`location.write`	Create, edit, reorder, and delete rooms on an assignment.
`media.capture`	Capture photos, video, and audio in the field app.
`media.read`	View captured media in the console and app.
`media.delete`	Delete media items (soft delete; the file is retained on the server).
`person.write`	Add and edit people records.
`tag.manage`	Add, rename, recolour, and delete the organization's **tags**. Putting an existing tag on something needs only that thing's own edit permission.
`webhook.manage`	Create and manage webhook endpoints. Org admins only.
`integration.manage`	Create and revoke integration tokens. Org admins only.
`audit.read`	View the audit log and workflow runs.

Who can assign which role

- **Only org admins can assign the org admin role.** The role dropdown disables it for everyone else with the note "Only org admins can assign this role".
- **Collaborator and observer are assigned at the assignment level**, not on the Users page. Org, business unit, and team admins grant them from the assignment **Access** tab when inviting someone by email or phone. See **Assignment-level invitations**.
- Business unit admins, team admins, and members are assigned when you add or edit a user on the **Users** page.

The Roles page

Open **People → Roles** to see the page titled "What each role can do, and who holds it." It shows:

- A card per role with a description, the permission badges it carries, and how many people currently hold it.
- A **Role assignments** table listing every user with an inline role selector, so you can change roles in place without opening the user editor.

Custom roles cannot be created

The six roles are a fixed set enforced by the server. There is no way to create a custom role or tweak an individual permission. If a person needs more or less access, choose the closest role or use assignment-scoped invitations to narrow their reach.

Org membership versus assignment access

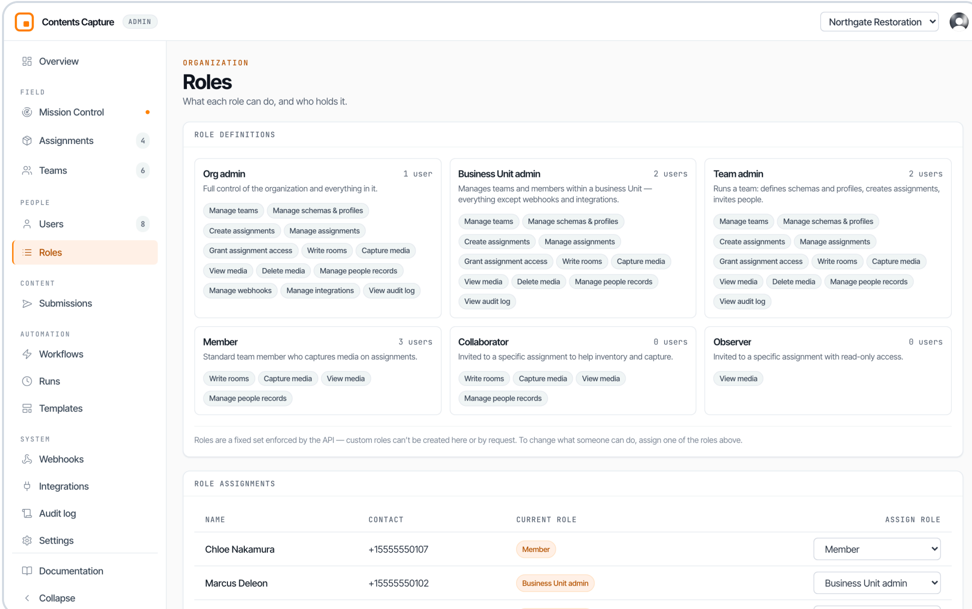
These are two separate layers, and understanding both prevents most access confusion:

- **Organization membership** (the Users page) puts a person in your org with a role. Members and admins see the org's teams and assignments according to their role and your **assignment visibility** settings.
- **Assignment-scoped access** (the assignment Access tab) grants a specific person, often someone outside the org, access to one assignment as a collaborator or observer. It does not make them an org member, and revoking it does not affect any org membership they have.

A contractor who only ever works one loss never needs org membership: invite them as a collaborator on that assignment, and revoke the invitation when the work is done.

Seeing the matrix

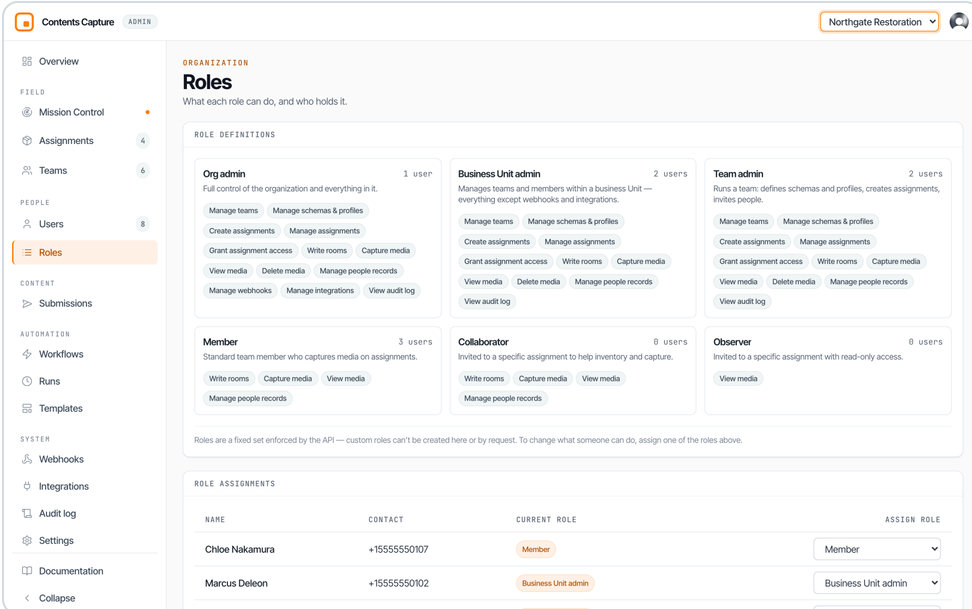
Roles in the sidebar lists every role and exactly what it may do.



The permission grid is the authoritative answer to "can this person do X". It is read-only: roles are fixed so that access is predictable and auditable.

NAME	CONTACT	CURRENT ROLE	ASSIGN ROLE
Chloe Nakamura	+15555550107	Member	Member
Marcus Deleon	+15555550102	Business Unit admin	Business Unit admin
Priya Raman	+15555550103	Business Unit admin	Business Unit admin
Sonia Alvarez	+15555550105	Team admin	Team admin
Tom Whitfield	+15555550104	Team admin	Team admin
Avery Brooks	+15555550101	Org admin	Org admin
Dale Rutherford	+15555550108	Member	Member
Ben Okafor	+15555550106	Member	Member

The assignable column shows which roles you may grant to somebody else. You can never grant a role above your own.


Contents Capture
ADMIN
Northgate Restoration
Overview
FIELD
Mission Control
Assignments 4
Teams 6
PEOPLE
Users 8
Roles
CONTENT
Submissions
AUTOMATION
Workflows
Runs
Templates
SYSTEM
Webhooks
Integrations
Audit log
Settings
Documentation
Collapse
ORGANIZATION
Roles
What each role can do, and who holds it.
ROLE DEFINITIONS
Org admin 1 user
Full control of the organization and everything in it.
Manage teams Manage schemas & profiles Create assignments Manage assignments Grant assignment access Write rooms Capture media View media Delete media Manage people records Manage webhooks Manage integrations View audit log
Business Unit admin 2 users
Manages teams and members within a business Unit — everything except webhooks and integrations.
Manage teams Manage schemas & profiles Create assignments Manage assignments Grant assignment access Write rooms Capture media View media Delete media Manage people records View audit log
Team admin 2 users
Runs a team: defines schemas and profiles, creates assignments, invites people.
Manage teams Manage schemas & profiles Create assignments Manage assignments Grant assignment access Write rooms Capture media View media Delete media Manage people records View audit log
Member 3 users
Standard team member who captures media on assignments.
Write rooms Capture media View media Manage people records
Collaborator 0 users
Invited to a specific assignment to help inventory and capture.
Write rooms Capture media View media Manage people records
Observer 0 users
Invited to a specific assignment with read-only access.
View media
Roles are a fixed set enforced by the API — custom roles can't be created here or by request. To change what someone can do, assign one of the roles above.
ROLE ASSIGNMENTS
NAME CONTACT CURRENT ROLE ASSIGN ROLE
Chloe Nakamura +15555550107 Member Member
Marcus Deleon +15555550102 Business Unit admin Business Unit admin

Structure and terminology

Contents Capture organizes every company the same way: an Organization contains Business Units, Business Units contain Teams, and Teams contain Users, with assignments living inside teams.

The hierarchy

```
Organization
└── Business Unit
    └── Team
        └── Users
```

A realistic insurance example:

Level	Example	Purpose
Organization	"Meridian Adjusting Group"	Your whole company. One org per company.
Business Unit	"West Coast Catastrophe"	A division, region, or line of business.
Team	"Sacramento CAT Crew"	The people who actually work losses together.
Users	Individual adjusters and leads	Members of one or more teams.

Assignments are always created inside a team. When a catastrophe hits, you might spin up a new business unit for the event with several teams underneath it, then archive or delete the structure after the response winds down.

Creating organizations

Most companies need exactly one organization. If you operate distinct companies, you can add more:

1. Go to **Settings** and find the **Organizations** card.
2. Click **New organization**.
3. Enter a name and confirm.

When you create an organization, a default business unit and team are created automatically and you become its org admin. The org table lists each organization with its name, org ID, and an active badge for the one you are currently working in.

Per organization you can:

- **Switch**: make it the org you are viewing and managing.
- **Rename**: change the display name.
- **Delete**: only available when you belong to more than one org.

> **Deleting an organization hides it, it does not erase it**
>
> Deleting an organization removes it from your console, but its data is retained and can be restored by support. If you delete one by accident, contact support to have it restored.

The Crews page

Open **Field → Crews** to manage business units and teams. (The page name reflects your terminology settings; see **Terminology** below.)

The page shows one card per business unit with a badge showing how many teams it contains. Per business unit you can:

- **New Team**: add a team inside that business unit.
- **Rename**: change the business unit name.
- **Delete**: remove the business unit and every team inside it.

> **Deleting a business unit is permanent**
>
> The confirmation reads "Permanently delete {name} and its teams? This can't be undone." Everything under that business unit is removed. Export or archive anything you need before confirming.

Each team row shows the team name as a link to its detail page and a **Watermark on/off** chip so you can see capture watermark status at a glance, plus Rename and Delete actions.

The New Business Unit wizard

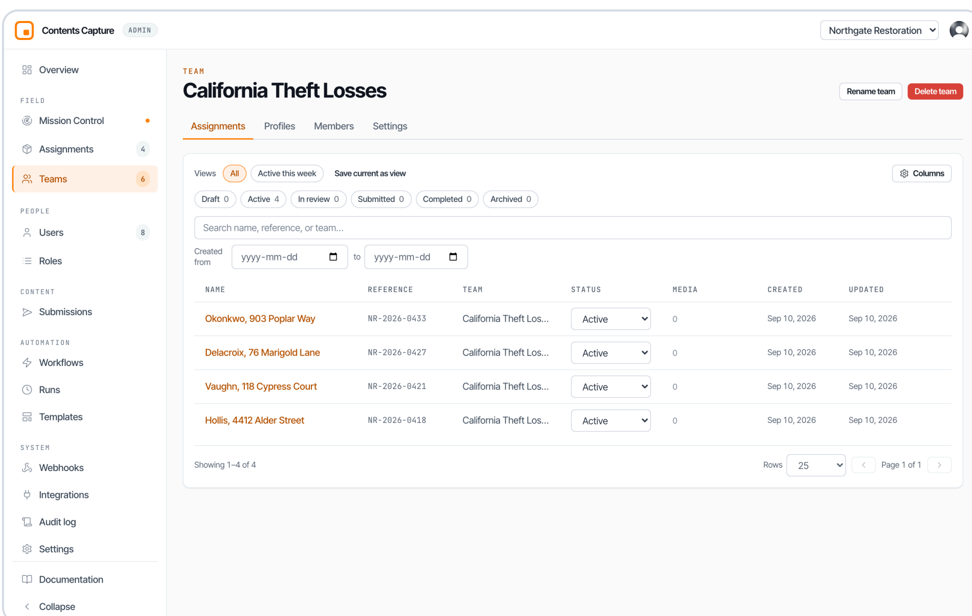
Click **New Business Unit** to launch a five-step wizard:

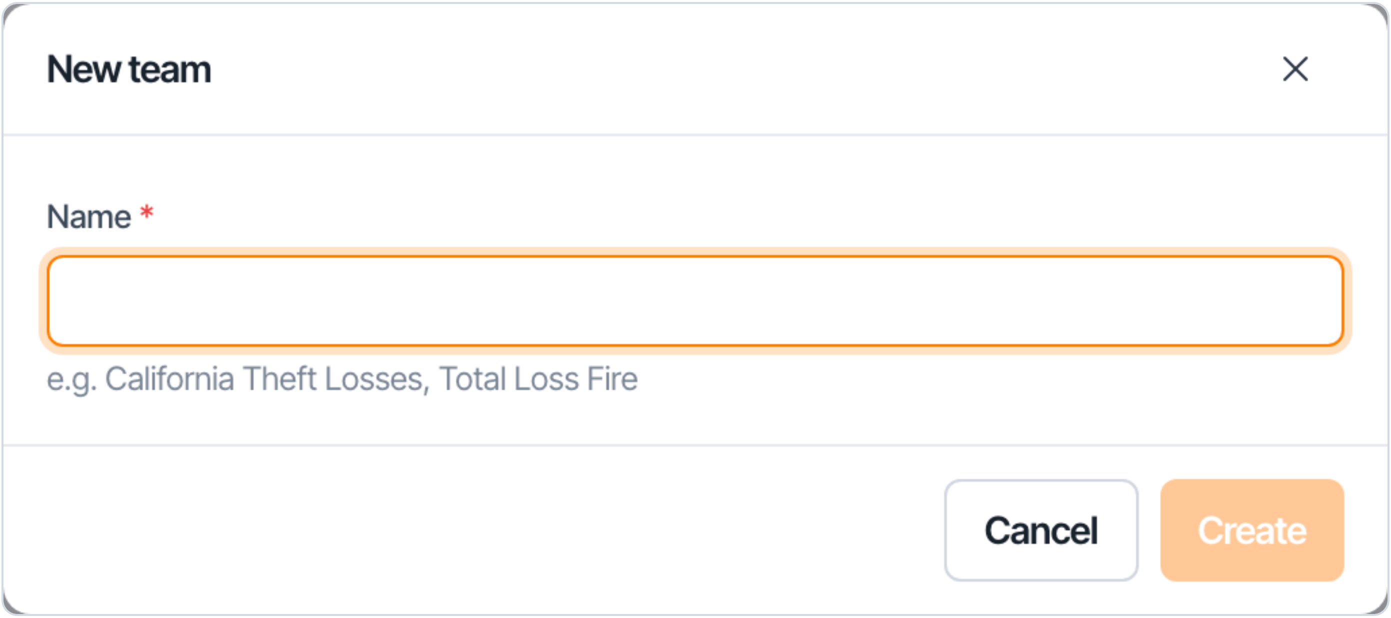
1. **Basics**: name the business unit.
2. **Admin**: seat an existing user as the business unit admin, or invite someone by email. They are granted the business unit admin role at org scope.
3. **First teams**: create the initial teams inside the unit.
4. **Team settings**: set the default capture settings for those teams. See **Capture settings**.
5. **Review**: check everything, then create.

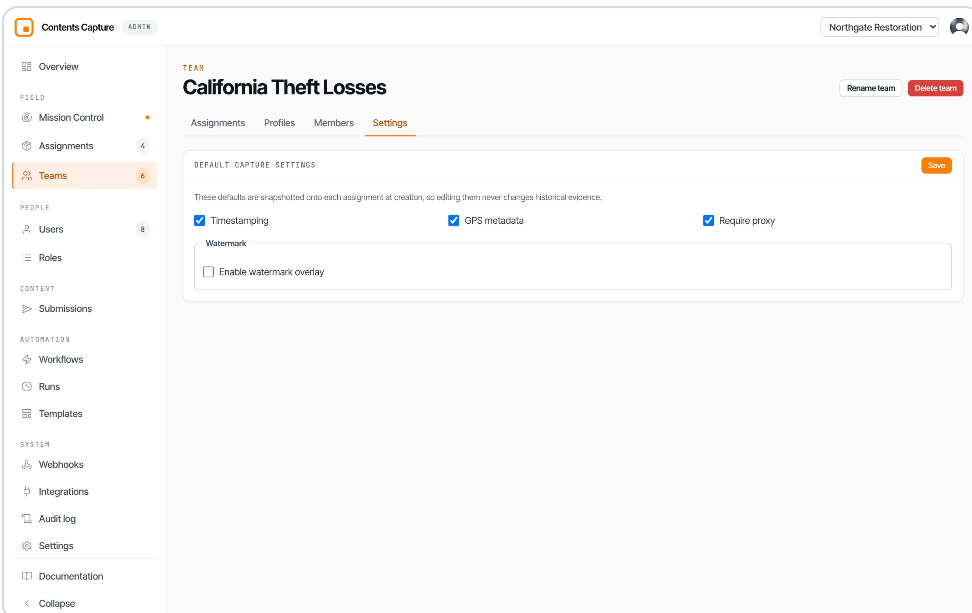
The wizard runs as a staged pipeline. If something is interrupted (a network drop, a closed tab), you can resume and retry without starting over; records that were already created are kept.

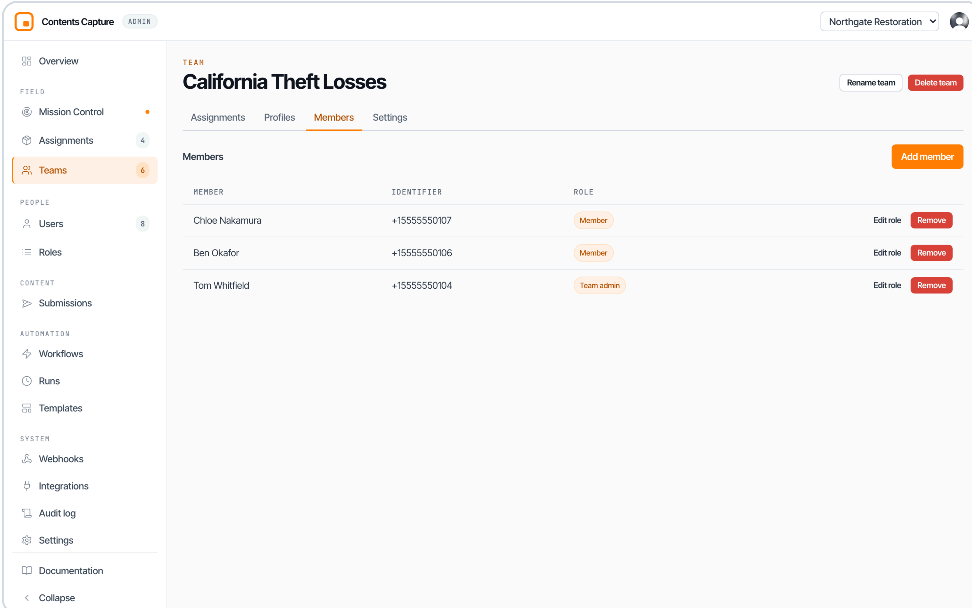
Team detail

Click a team name to open its detail page, which has four tabs:




New team
Name *
e.g. California Theft Losses, Total Loss Fire
Cancel
Create


Contents Capture
ADMIN
Northgate Restoration
Overview
FIELD
Mission Control
Assignments
4
Teams
6
PEOPLE
Users
8
Roles
CONTENT
Submissions
AUTOMATION
Workflows
Runs
Templates
SYSTEM
Webhooks
Integrations
Audit log
Settings
Documentation
Collapse
TEAM
California Theft Losses
Rename team
Delete team
Assignments
Profiles
Members
Settings
DEFAULT CAPTURE SETTINGS
Save
These defaults are snapshotted onto each assignment at creation, so editing them never changes historical evidence.
Timestamping
GPS metadata
Require proxy
Watermark
Enable watermark overlay



Tab	What it holds
Assignments	The assignments explorer, locked to this team.
Profiles	The capture profiles owned by this team. See **Capture profiles.**
Members	The team roster and per-member roles. See **Team members.**
Settings	The team's default capture settings. See **Capture settings.**

The header offers **Rename Team** and **Delete Team**.

Deleting a team removes its work structure

The delete confirmation warns: "Its assignments, profiles, and members will be removed." If the team holds assignments you still need, move or archive that work first.

Terminology

Every company talks differently. Go to **Settings → Terminology** to rename the eight nouns the platform uses:

- Business unit (singular and plural)
- Team (singular and plural)

- Assignment (singular and plural)
- Location / room (singular and plural)

For example, rename **Team** to **Crew** and every label in both the admin console and the mobile app updates, which is why the navigation item appears as "Crews" in many organizations. Leave a field blank to fall back to the default. This guide uses the default nouns, but your console may show your renamed versions everywhere.

This guide uses default names

When this guide says "Team" and your console says "Crew", they are the same thing. Terminology renaming is cosmetic and does not change any behavior or permission.

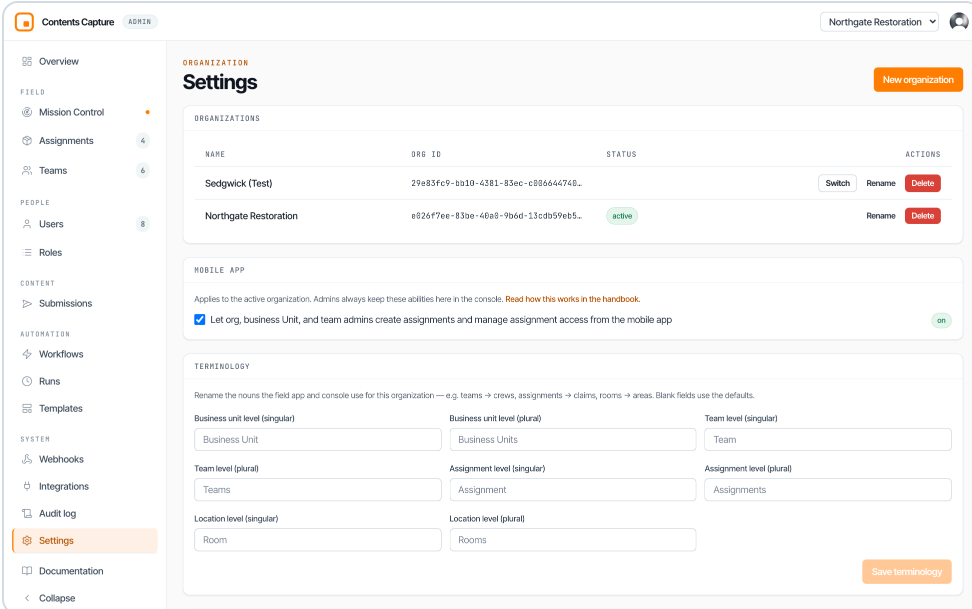
When to split business units versus teams

There is no wrong answer, but these guidelines work for most adjusting firms:

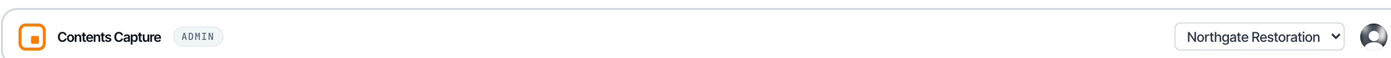
- **Split by business unit when the groups operate independently.** Different regions, different lines of business (residential vs commercial), or different carrier contracts with their own admins are good candidates. Each business unit can have its own admin who manages everything beneath it.
- **Split by team when the groups share oversight but work different losses.** Crews within a region, day and night shifts, or per-event rosters on a catastrophe response are usually teams.
- **Prefer fewer layers.** If your whole company is one flat roster, a single business unit with a handful of teams is simpler to run than a deep tree.
- **Use assignments, not teams, for individual losses.** A team is a durable group of people; an assignment is a unit of work. Create assignments freely and archive them when done.

Organization settings

Settings holds the organization's name, its terminology, and the policies that apply everywhere.

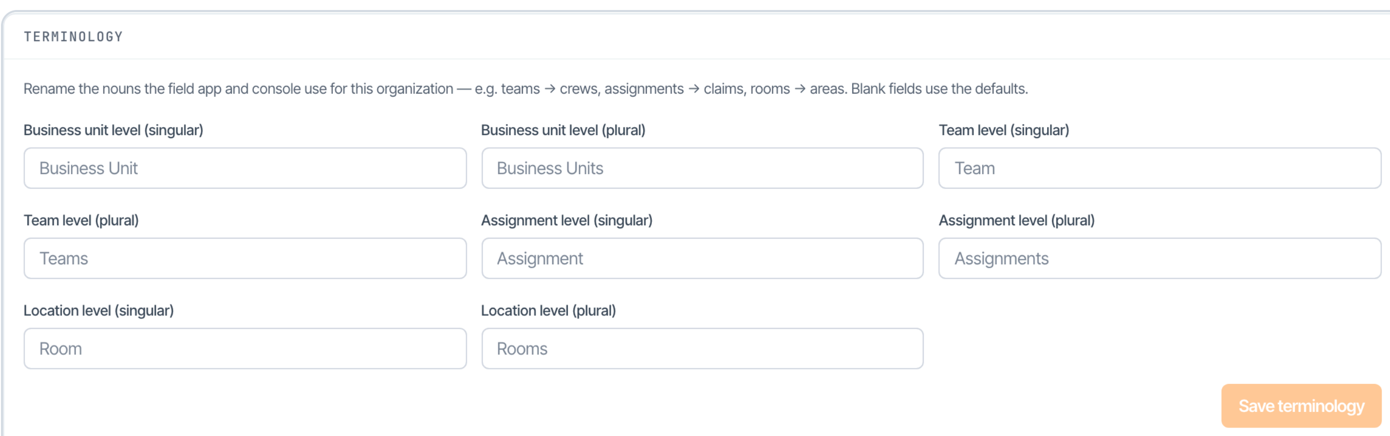


If you belong to more than one organization, the switcher in the top right decides which one you are administering. Everything on screen follows it.



Terminology

Your organization's own words for the hierarchy. Rename Assignments to Claims, or Rooms to Areas, and the whole console and mobile app follow.



Mobile policy

What the field app is allowed to do, including whether admins may create assignments and grant access from their phone.

MOBILE APP

Applies to the active organization. Admins always keep these abilities here in the console. Read how this works in the handbook.

- [x] Let org, business Unit, and team admins create assignments and manage assignment access from the mobile app — on

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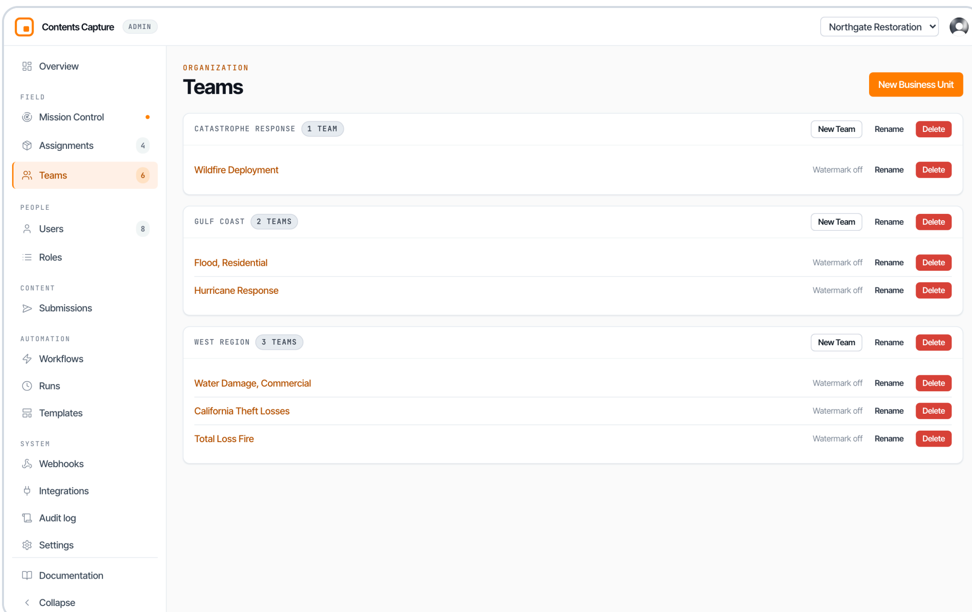
Business units and crews

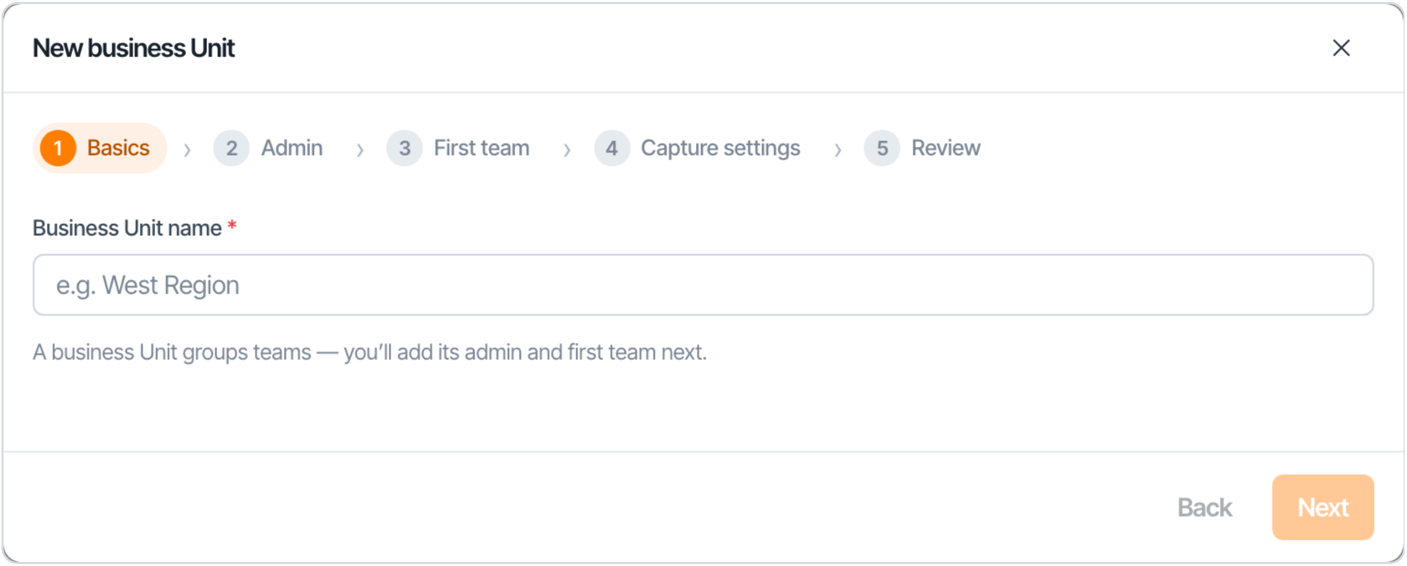
Teams lists the business units and the crews inside them.



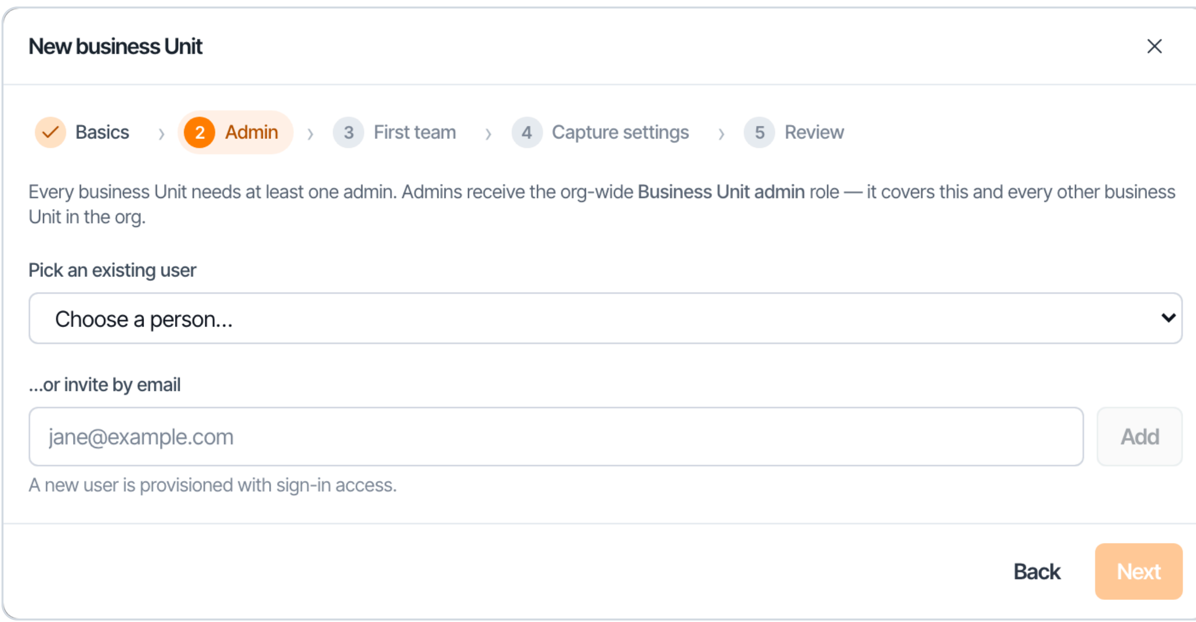
A business unit is a division of the company. It sits between the organization and the crews that do the work, which is what makes it possible to give a regional manager everything in their region and nothing outside it.

The New Business Unit wizard

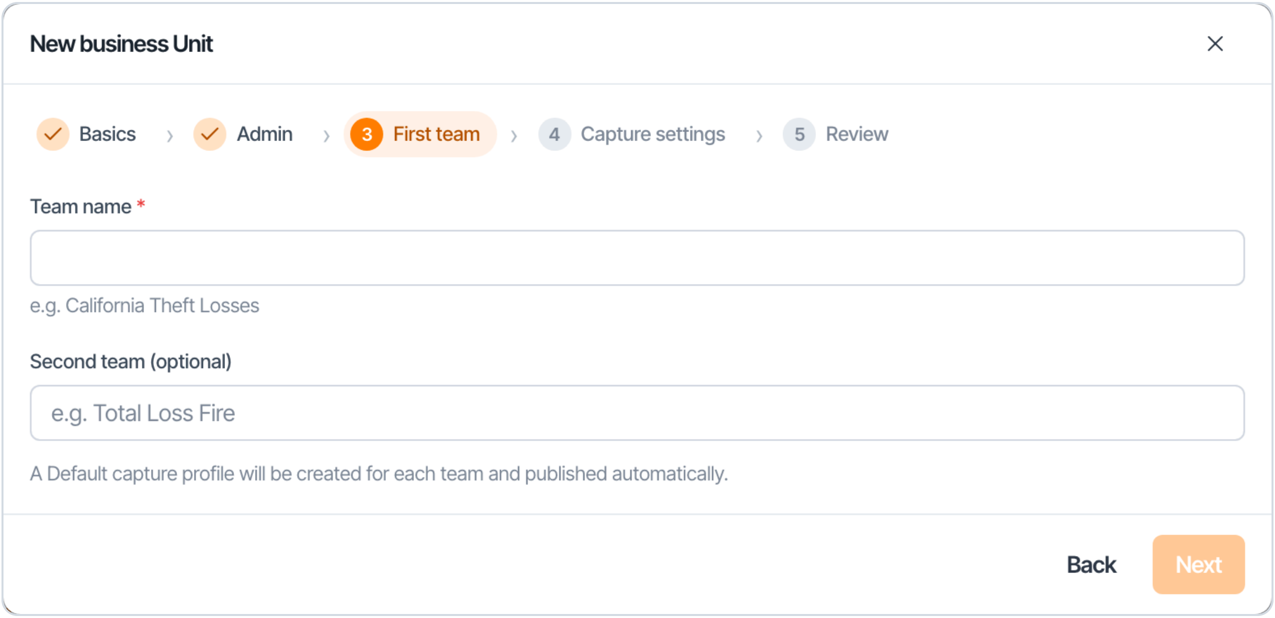
Start with its name.



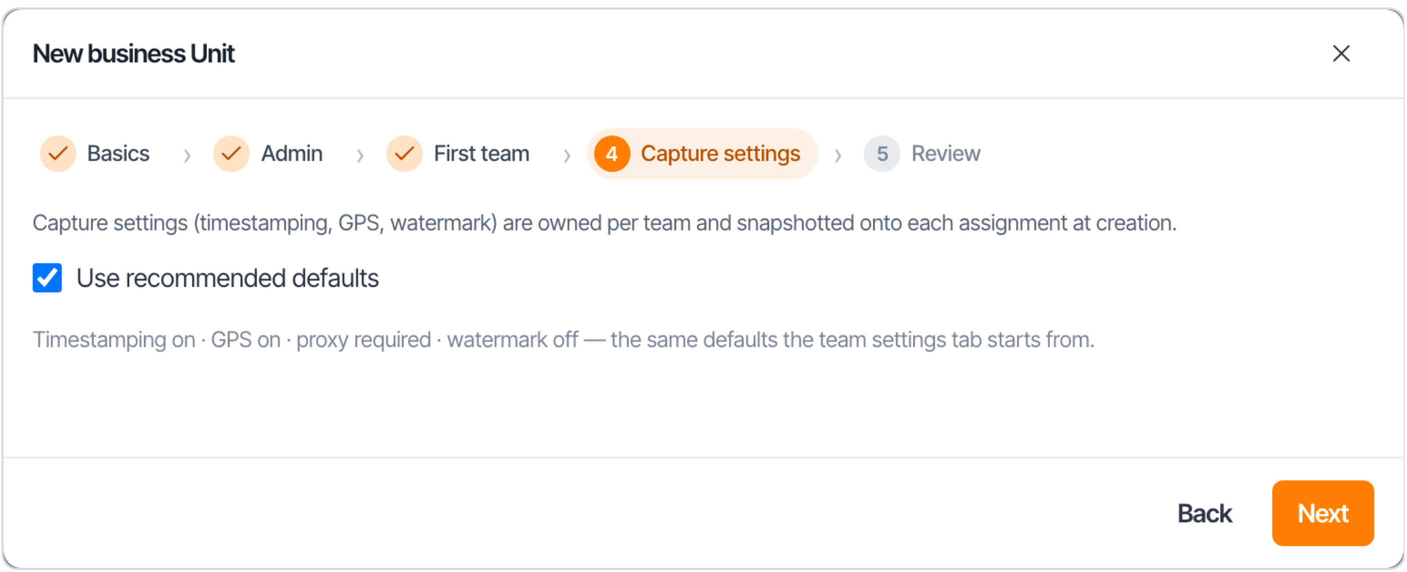
Name its administrator, who gets admin over everything inside it.



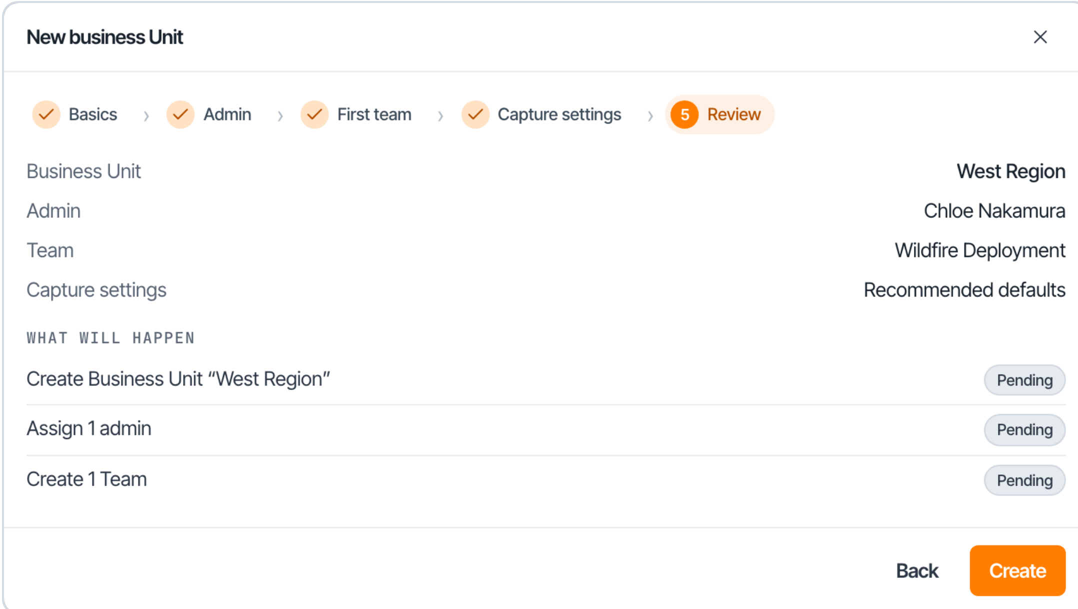
Create its first crew, so it has somewhere for work to live.



Choose the capture settings its assignments inherit.



Review, then create.


New business Unit
Basics
Admin
First team
Capture settings
5 Review
Business Unit
West Region
Admin
Chloe Nakamura
Team
Wildfire Deployment
Capture settings
Recommended defaults
WHAT WILL HAPPEN
Create Business Unit “West Region”
Pending
Assign 1 admin
Pending
Create 1 Team
Pending
Back
Create

Users and invitations

The Users page is your organization directory: everyone who can sign in, what role they hold, and whether their identity and app install are set up.

The Users page tour

Open **People → Users**. User management is admin-only; members and collaborators do not see this page.

The directory table shows one row per person:

Column	Meaning
Name	Full name as entered. Click the row to open the user activity drawer.
Contact	Email and phone number on file.
Role	The person's role in your organization. See **Roles and permissions**.
Identity	"Clerk linked" means their sign-in identity is connected and working. "Pending" means the identity has not finished linking yet, typically because they have not signed in for the first time.
TestFlight	Status of their iOS app install invitation: Active, Error, skipped, or removed.
Actions	Edit and deactivate.

A hint above the table shows how many people are in the organization.

Adding a user

1. Click **Add user**.
2. Enter the **Full name**. This is used for their sign-in identity and app install invitation.
3. Enter an **Email** address, a **Phone** number, or both. Email is required for iOS install invitations. Phone must be in E.164 format: a plus sign, the country code, then the number with no spaces or punctuation, for example `+14155550123`.
4. Choose a **Role**. Restricted roles are disabled in the dropdown with an explanation (for example, only org admins can assign the org admin role).

When you save, three things happen behind the scenes:

- A **sign-in identity** is created, so the person can sign in to the console and the mobile app immediately with a one-time code.
- An **app install invitation** is sent for iPhone users, delivered through Apple's TestFlight or the App Store.
- The person is **recorded in your organization directory**.

If any of those steps fails (for example, the install invitation service is unreachable), the console shows a warning toast telling you which part needs attention. The user record itself is still created.

Validation rule

You must provide an email or a phone number. If both are blank, the dialog reports "Provide an email or a phone number."

Editing users and changing roles

Click **Edit** on a row to change the person's display name or role. Role changes take effect immediately across the console and the mobile app on the next sync.

You can also change roles inline from the **Role assignments** table on the **Roles page**.

Deactivating a user

Click **Deactivate** on a row when someone leaves the company or no longer needs access.

What deactivation does

Deactivating removes the person from your organization, bans their sign-in, and pulls their mobile app access. Their identity is recoverable: if they rejoin later, support can restore the same identity rather than creating a fresh one. Media they already captured and submitted is not affected; it stays locked in the assignments where it was submitted.

The user activity drawer

Click any row to open the **User activity** drawer, which shows the person's capture activity over the last 24 hours: items captured, pace, and recent work. Use it to confirm a new hire is capturing, or to check whether someone reporting app trouble is actually syncing.

Pending users

A user whose **Identity** column shows "Pending" has been added to the directory but has not completed first sign-in. This is normal for new additions. If someone stays pending for days, confirm you used the right email or phone, then ask them to sign in with a one-time code. There is no separate activation step on your side.

Assignment-level invitations

Org membership is not the only way to give someone access. For contractors, carrier representatives, or anyone who should see exactly one assignment, use assignment-level invitations:

1. Open the assignment and go to the **Access** tab.
2. In the **Invitations** section, enter the person's **email or phone number**.
3. Choose the access level:
   - **Collaborator**: can capture and view media on this assignment, like a member but scoped to this assignment only.
   - **Observer**: view only.
4. Send the invitation.

Invitations move through four statuses:

Status	Meaning
Pending	Sent, not yet accepted. You can revoke a pending invitation.
Accepted	The person has access and can sign in.
Revoked	You withdrew the invitation or their access. Immediate effect.

Status	Meaning
Expired	The invitation lapsed before being accepted.

No resend button

There is no "resend invitation" action. If an invitation expires or the person cannot find it, simply invite the same email or phone number again.

Team Members tab

Team rosters are managed on the team's detail page, under the **Members** tab. The table lists each member with their identifier and role.

To add someone:

1. Click **Add member**.
2. Either pick an existing person from the **organization directory**, or choose "Add someone not in the organization" and enter an email or phone number. The second path creates a pending user and adds them in one step.
3. Set their role in the team.

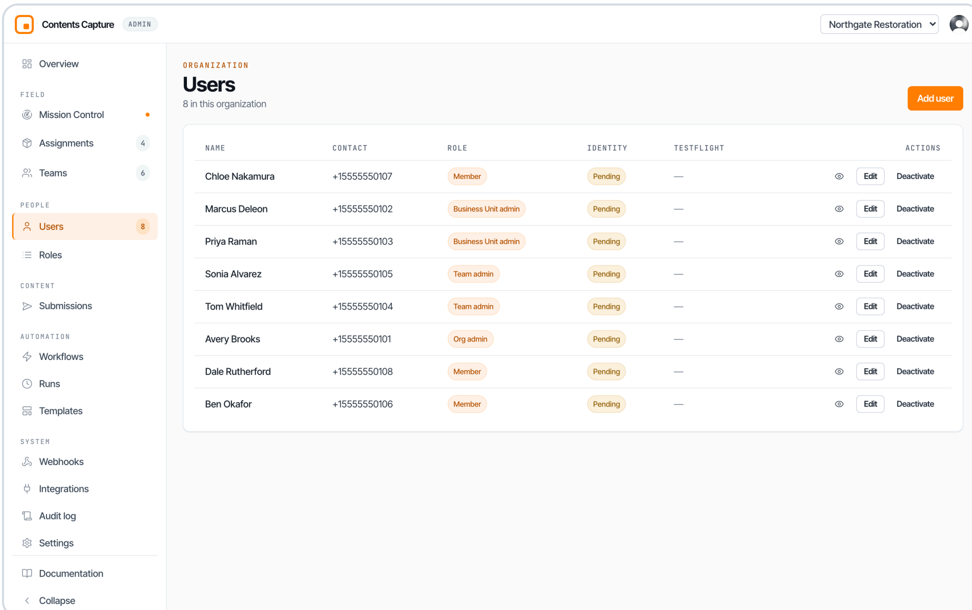
Per row you can **Edit role** or **Remove**. Removing someone shows the note "They will lose access until re-added"; their captures and history stay intact, and re-adding them restores access instantly.

Best practices

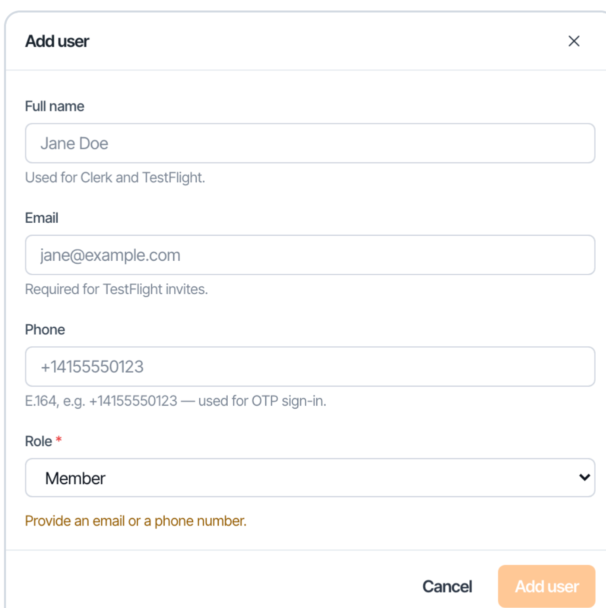
- **Give people the smallest role that fits their job.** Most field staff should be members. See **Roles and permissions**.
- **Use collaborator invitations for outsiders** instead of adding contractors to your org directory. Revoke when the loss closes.
- **Collect both email and phone** when adding users. Email covers install invitations; phone is a reliable fallback for sign-in codes.
- **Deactivate promptly when someone leaves.** It is recoverable, so there is no reason to wait.
- **Watch the pending list after a hiring wave.** Anyone still pending after a few days probably has a wrong email address.

Adding somebody

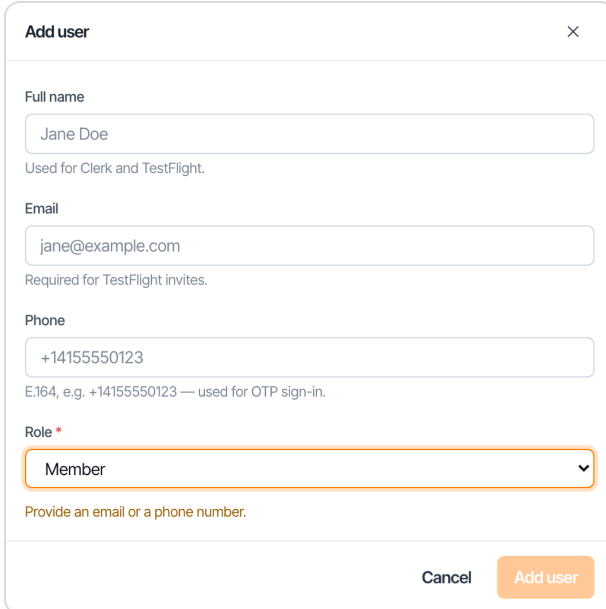
Users is the organization directory: everyone who can sign in, the role they hold, and whether their identity and app install are set up.



Use **Add user** and give the email address or phone number they will sign in with. It must be exact: access is tied to that address.



Choose their role. You can only grant roles at or below your own.

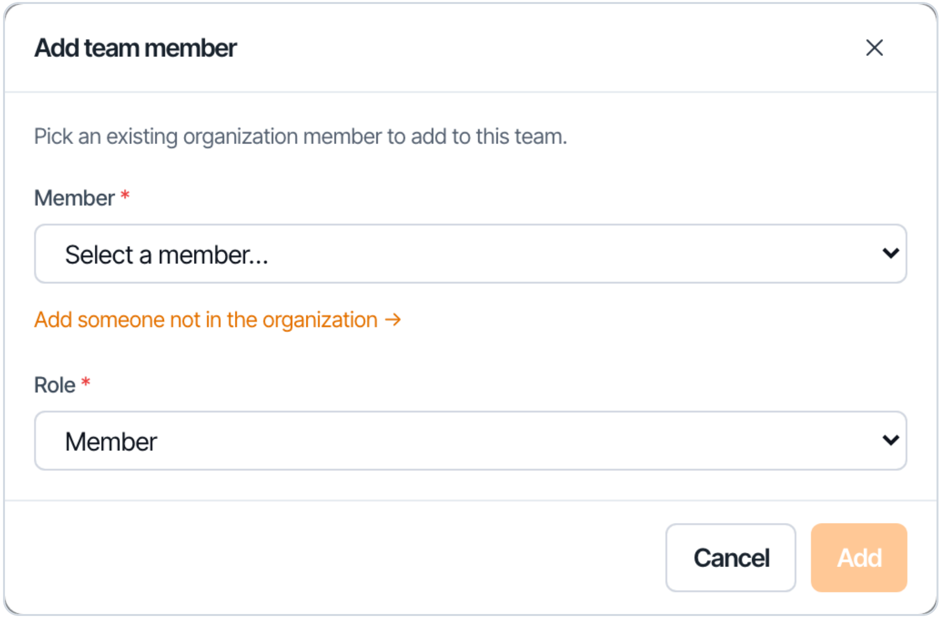


They appear in the directory immediately, and can sign in straight away.

NAME	CONTACT	ROLE	IDENTITY	TESTFLIGHT	ACTIONS
Chloe Nakamura	+15555550107	Member	Pending	—	Edit Deactivate
Marcus Deleon	+15555550102	Business Unit admin	Pending	—	Edit Deactivate
Priya Raman	+15555550103	Business Unit admin	Pending	—	Edit Deactivate
Sonia Alvarez	+15555550105	Team admin	Pending	—	Edit Deactivate
Tom Whitfield	+15555550104	Team admin	Pending	—	Edit Deactivate
Avery Brooks	+15555550101	Org admin	Pending	—	Edit Deactivate
Dale Rutherford	+15555550108	Member	Pending	—	Edit Deactivate
Ben Okafor	+15555550106	Member	Pending	—	Edit Deactivate

Putting them on a crew

A role says what somebody may do; crew membership says which work they see. Open the crew and add them as a member.



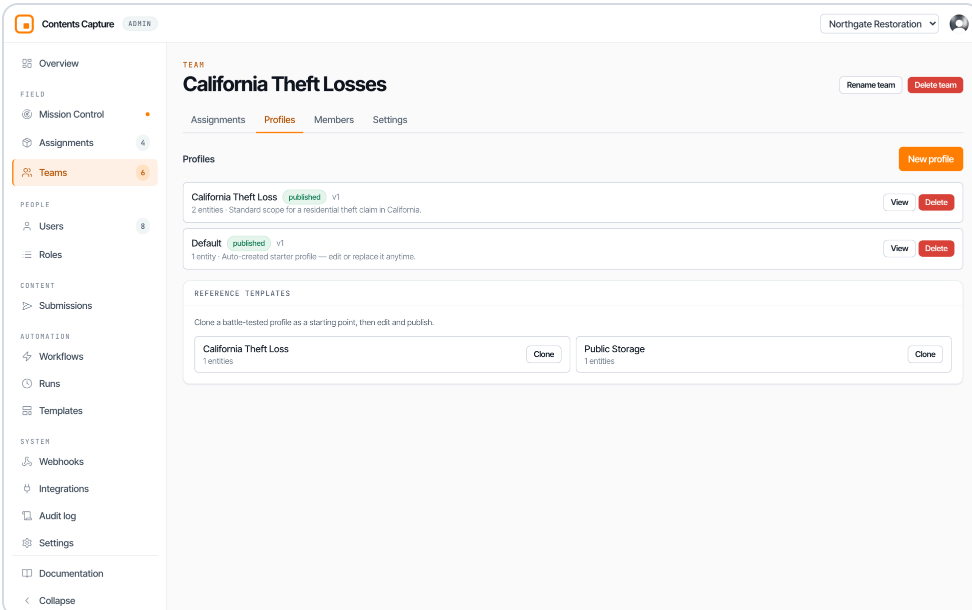
Changing a role later

Roles can be changed at any time from the directory. Every change is written to the audit log.

NAME	CONTACT	CURRENT ROLE	ASSIGN ROLE
Chloe Nakamura	+15555550107	Member	Member
Marcus Deleon	+15555550102	Business Unit admin	Business Unit admin
Priya Raman	+15555550103	Business Unit admin	Business Unit admin
Sonia Alvarez	+15555550105	Team admin	Team admin
Tom Whitfield	+15555550104	Team admin	Team admin
Avery Brooks	+15555550101	Org admin	Org admin
Dale Rutherford	+15555550108	Member	Member
Ben Okafor	+15555550106	Member	Member

Capture profiles

A capture profile is the form attached to every assignment: the set of fields adjusters fill in as they document a loss, such as "Loss Information" or "Item".



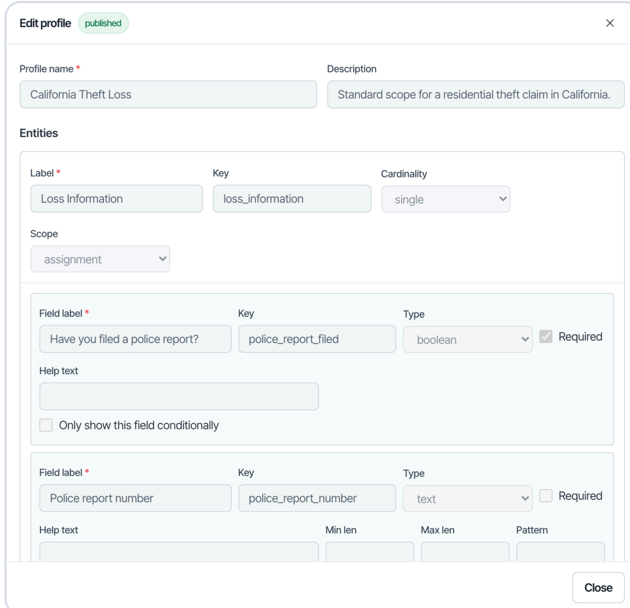
What a capture profile is

Think of a profile as the paperwork template for a kind of claim. A "Residential Contents Loss" profile might collect the loss summary, policyholder details, and one item entry per belonging. A "Commercial Theft" profile might collect different fields entirely. Profiles are built from **entities** (named collections of fields), and each entity is built from **fields** (one question or data point each).

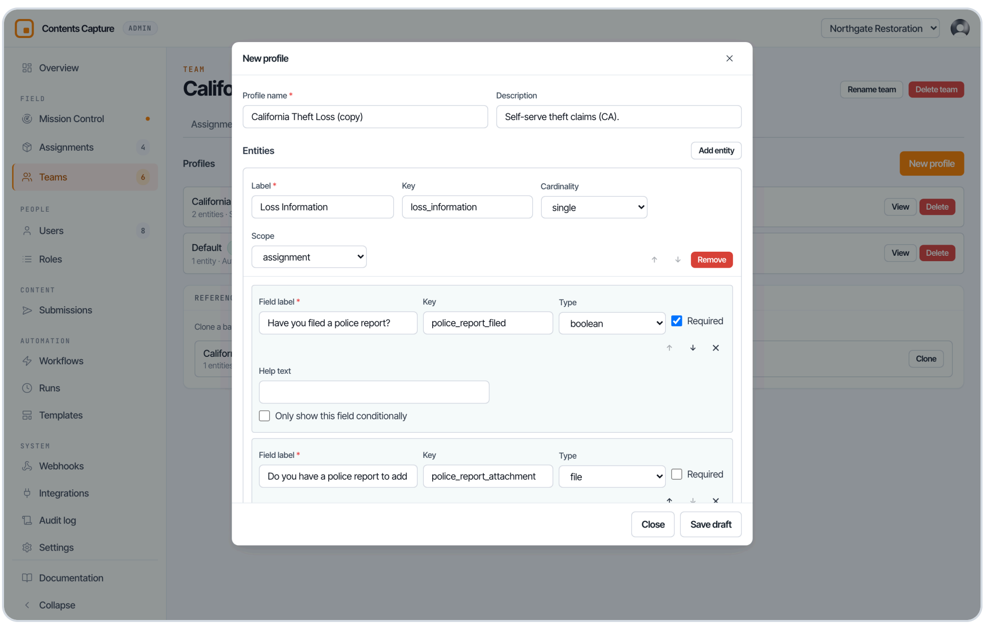
Profiles belong to a team and are managed on the team detail page under the **Profiles** tab. Building and publishing profiles requires the schema.manage permission, held by team admins and above.

Lifecycle: draft, published, archived

Every profile has a status badge:



Cloning an existing profile is usually faster than starting from nothing.



Status	Meaning
Draft (amber)	Editable. Save, rename, restructure freely. Cannot be attached to assignments yet.
Published (green)	Locked and available for new assignments. Cannot be edited or renamed.
Archived	Retired. Kept for history but no longer offered when creating assignments.

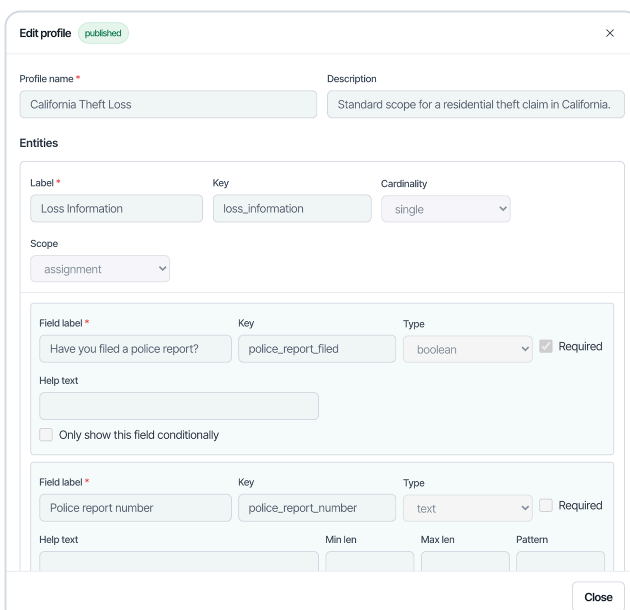
Each profile row on the Profiles tab shows its name, status badge, version number, entity count, and description, with actions appropriate to its state: **Edit** for drafts, **View** for published and archived profiles, **Rename** for drafts only, and **Delete**.

Published profiles are locked on purpose

Once a profile is published, the server makes it immutable. This protects evidence integrity: every assignment created from the profile must be able to prove exactly which fields existed when its media was captured. To change a published profile, clone it or create a new version, then use the new profile for future assignments. Existing assignments are never affected. See **How profiles attach**.

Creating a profile

1. Open the team detail page and go to the **Profiles** tab.
2. Click to create a new profile (or clone a **reference template**).
3. Enter a **Name**, for example "California Theft Loss", and a **Description**.
4. Add **entities** and **fields** as described below.
5. **Save draft**, then **Publish** when the profile is ready for assignments.



The builder validates your profile before saving and will not let you publish an invalid one. The flow is always "Save the draft first, then publish".

Entities

An entity is a named collection of fields, for example "Loss Information" or "Item". Per entity you set:

- **Label**: the human-readable name adjusters see.
- **Key**: auto-generated from the label in snake_case (lowercase words joined by underscores, like `loss_information`). Keys are the stable identifier used behind the scenes; you rarely need to touch them.
- **Cardinality**: **single** (one set of these fields per scope, like one Loss Information block) or **many** (repeatable entries, like one Item per belonging).
- **Scope**: where the entity is filled in. See the next section.
- **Reorder** and **Remove** controls.

Scope, with examples

Scope decides which part of the work an entity's fields attach to:

Scope	Plain meaning	Example
Assignment	One set of values for the whole assignment.	Claim number, date of loss, adjuster notes.
Location	One set per room or location on the assignment.	Room condition, pre-existing damage notes.
Group	One set per group of media.	A set of fields describing a batch of related photos.
Media	Fields attached to individual photos, videos, or audio clips.	Per-item condition rating or item description.

Only assignment-scoped entity fields appear in the assignment creation wizard. Fields at other scopes are filled in by field staff in the app.

The 15 field types

Profiles support 15 field types, from simple text to signatures:

Type	One-line description
text	A single line of text.
long_text	Multiple lines of text for notes and narratives.
number	A numeric value, with optional min and max.
currency	A money amount, with optional min and max.
boolean	A yes/no toggle.
date	A calendar date.
datetime	A date plus a time.
select	Pick one option from a list you define.
multiselect	Pick any number of options from a list you define.
phone	A phone number.
email	An email address.
barcode	Scan a barcode or QR code with the device camera.
file	Attach a file, captured in the field app.
media_ref	Reference another captured media item, captured in the field app.
signature	Capture a drawn signature in the field app.

The full detail table, including what field users see and every option per type, lives in **Reference → Field types.**

> **Field app only**
>
> File, media reference, and signature fields are filled in by field staff in the iOS app and are read-only in the console. The console shows their captured values but cannot edit them.

Field options

Per field you can set:

- **Required**: the field must be filled before the work can be submitted.
- **Help text**: a hint shown to the field user under the field.
- **Min / Max**: numeric bounds for number and currency fields.
- **Min length / Max length / Pattern**: constraints for text-like fields. Patterns are regular expressions for cases like enforcing a claim-number format.
- **Options**: the list of choices for select and multiselect fields.
- **Conditional visibility**: show the field only when a condition is met.

Conditional visibility

Enable **"Only show this field conditionally"** and set a rule of the form "When field {sibling} Equals {value}". The rule references a sibling field in the same entity.

Example: your "Cause of loss" select has an "Other" option. Add a "Cause of loss detail" text field that only shows when Cause of loss equals Other, so adjusters are not burdened with an extra field unless it is relevant.

Reference templates

The **Reference templates** card on the Profiles tab offers battle-tested starting points: "Clone a battle-tested profile as a starting point." Cloning opens the builder with a copy named "{name} (copy)" that you can reshape and publish as your own. Cloning never modifies the original template.

How profiles attach to assignments

Assignments are created from a **published** profile. At the moment of creation, the assignment takes a **snapshot** of the profile's schema and records the profile version. From then on:

- Editing or publishing a newer version of the profile never changes existing assignments.

- The assignment's Overview tab shows exactly which profile version it carries.
- Two assignments created from the same profile at different times can legitimately have different fields.

This snapshot model is the backbone of evidence integrity: an assignment's paperwork can never silently change after capture has begun.

Validation on save and publish

The builder checks your work client-side before saving: duplicate keys, missing labels, empty option lists, and broken conditional rules are all flagged before anything reaches the server. Publishing runs the same checks again, so a published profile is always structurally sound.

Capture settings

Capture settings are the evidence rules applied to every photo, video, and audio clip: timestamping, GPS metadata, proxy requirements, and watermarks.

Where capture settings live

Capture settings exist at two levels:

- **Team defaults**: set on the team detail page under **Settings**, labeled "Default capture settings".
- **Per-assignment overrides**: set on the assignment's **Settings** tab.

Both levels use the same editor. The Settings page also has a **Capture settings by team** card summarizing watermark and GPS status per team with links into each team.

Snapshot semantics

Capture settings are **snapshotted onto each assignment at creation**. The team Settings tab says it plainly: "These defaults are snapshotted onto each assignment at creation, so editing them never changes historical evidence."

In practice:

- Changing team defaults affects only assignments created after the change.
- Editing an assignment's own settings changes only that assignment.
- Two assignments from the same team can have different settings if the defaults changed between their creation dates.

Every option, with defaults

Timestamping

Default: on. Every capture records the exact time it was taken. Timestamps are the foundation of the audit trail and appear in the media metadata sidebar. Leave this on unless you have a specific reason not to.

GPS metadata

Default: on. Every capture records where it was taken, provided the field user has granted location permission on their device.

What field users see: the camera shows a "GPS on" indicator when location is flowing. If the device has not granted location permission, captures still work but carry no coordinates, and the Overview map shows "No GPS" for that adjuster. See Overview dashboard.

Require proxy

Default: on. A compressed copy (the "proxy") must be generated and uploaded before an item counts as ready. Proxies are what make the console's media grid and lightbox fast, since reviewers open the lightweight copy instead of multi-megabyte originals.

The original master file is always kept regardless of this setting. Require proxy only controls whether an item is considered complete for review before its proxy exists.

Watermark

Default: off. When enabled, a visible watermark is burned into review copies of captures. Watermarks are typically required by carriers for chain-of-custody documentation.

When the watermark is enabled, these sub-options appear:

Option	Default	Meaning
Time	on	Burn the capture timestamp into the image.

Option	Default	Meaning
User	on	Burn the capturer's name into the image.
Location	off	Burn GPS coordinates into the image.
Assignment	off	Burn the assignment name or reference into the image.
Custom text	empty	Free text of up to 120 characters, for example a claim number.
Logo URL	empty	An image URL for a logo to include in the watermark.
Logo position	bottom right	Where the logo sits: any corner or center.
Text position	bottom left	Where the text sits: any corner or center.
Opacity	0.85	How strong the watermark appears, from 0 (invisible) to 1 (fully solid).

Burned-in watermarks and clean originals

The watermark is burned into **review copies only**. The original master file is always stored clean, with no watermark. This means:

- Reviewers in the console see the watermarked copy by default, which is what carriers usually want to see.
- Anyone reviewing media can toggle **"Hide watermark (view clean original)"** in the lightbox to inspect the untouched master. See **Submissions and media**.
- The **Download original** button always delivers the clean master file.

You never lose the unmarked evidence by turning watermarks on.

Guidance

When to enable watermarks:

- A carrier contract requires visible timestamp or identity marks on photos.
- Media will be shared outside your organization and you want provenance visible in every copy.
- Disputed claims where chain-of-custody questions are likely.

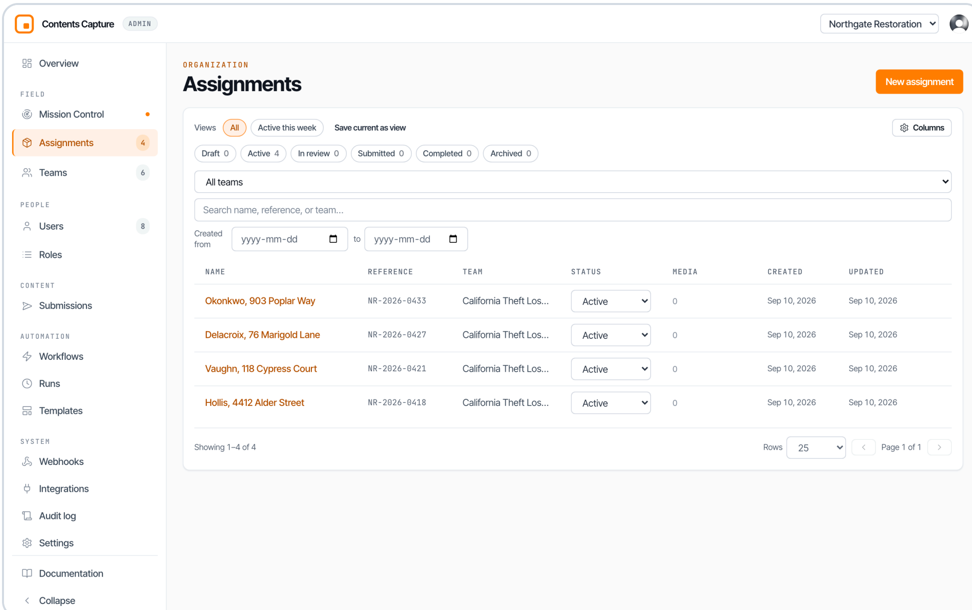
When to leave them off:

- Internal-only documentation where the audit log and metadata already provide provenance.
- Workflows where adjusters or clients need clean images for reports.

Recommended defaults for most teams: keep timestamping, GPS, and require proxy on, and leave the watermark off unless a carrier asks for it. When a carrier does ask, enable Time and User (both already on by default), add the claim number as custom text, and consider Location on for catastrophe work where the exact capture site matters.

Assignments

An assignment is a unit of work, typically one loss, created from a published capture profile and placed in a team so its members see it in the field app.



The assignments explorer

Open **Field → Assignments** to see every assignment you have access to. The explorer is built for volume: filters, saved views, and a customizable table.

Status filter chips

Across the top, filter chips show each status with a live count. Click chips to include or exclude statuses; multiple chips can be active at once.

Status	Meaning
Draft	Created but not yet put into the field.
Active	Being worked. Captures are arriving.
In review	Field work is done; office review is underway.

Status	Meaning
Submitted	Set automatically when every media item on the assignment belongs to a submission. Reverts to active automatically if new media arrives.
Completed	Reviewed and closed.
Archived	Retired from day-to-day lists.

"Submitted" manages itself

You never set the submitted status by hand. The platform sets it when all captured media has been handed off in submissions, and clears it the moment new media arrives. Think of it as a signal light, not a workflow step. Your review workflow is in review → completed → archived. See **Submissions and media.**

Views bar

The views bar holds built-in views (**All**, **Active this week**) plus your saved views. Saved views capture the current filters, search, and columns so you can return to a working set with one click. Views can be:

- **Mine**: personal, visible only to you.
- **Shared**: visible to the whole organization. Sharing requires team.manage. Use "Share with the whole organization" when saving.

Views can be renamed and deleted from the same bar.

Search and filters

- **Search**: "Search name, reference, or team", matches across assignment names, claim references, and team names.
- **Crew select**: filter to one team. Available when viewing org-wide.
- **Created from/to**: date range filters for the creation date.

Column manager

Click the column manager to show or hide columns (the Name column always stays visible), reorder them by dragging, and resize them by dragging column borders. Your layout is saved per person, so everyone can arrange the table to their liking without affecting colleagues.

Available columns: **Name**, **Reference**, **Team**, **Status**, **Media** (counts), **Created**, **Updated**.

Pagination

Choose 25, 50, or 100 rows per page at the bottom of the table.

Row actions

Each row offers inline actions (requires the assignment.manage permission):

- **Status dropdown**: change the assignment status without opening it.
- **Edit**: change the name and reference.
- **Delete**: remove the assignment.

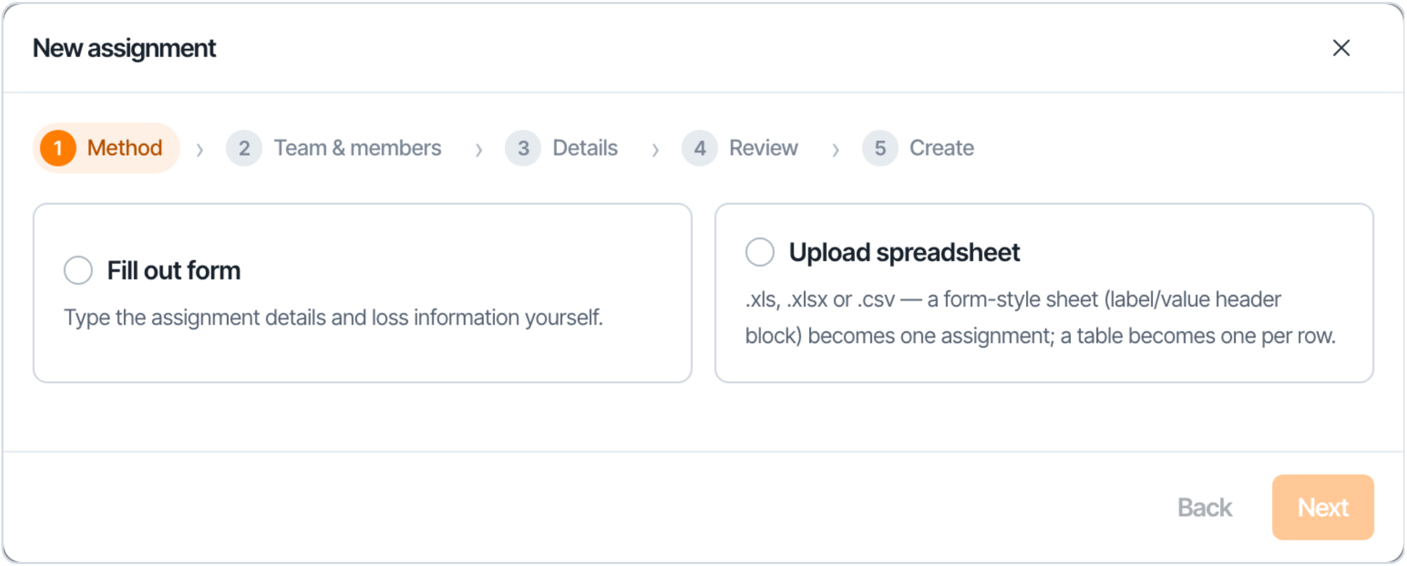
> **What deleting an assignment does**
>
> Deleting tombstones the assignment: it is removed from every device on the next sync, and it disappears from your lists. Captured evidence is retained in storage, so nothing submitted is destroyed, but the assignment itself is gone from the console and the field app.

Creating assignments with the wizard

Click **New assignment** to launch the five-step wizard.

Step 1: Method

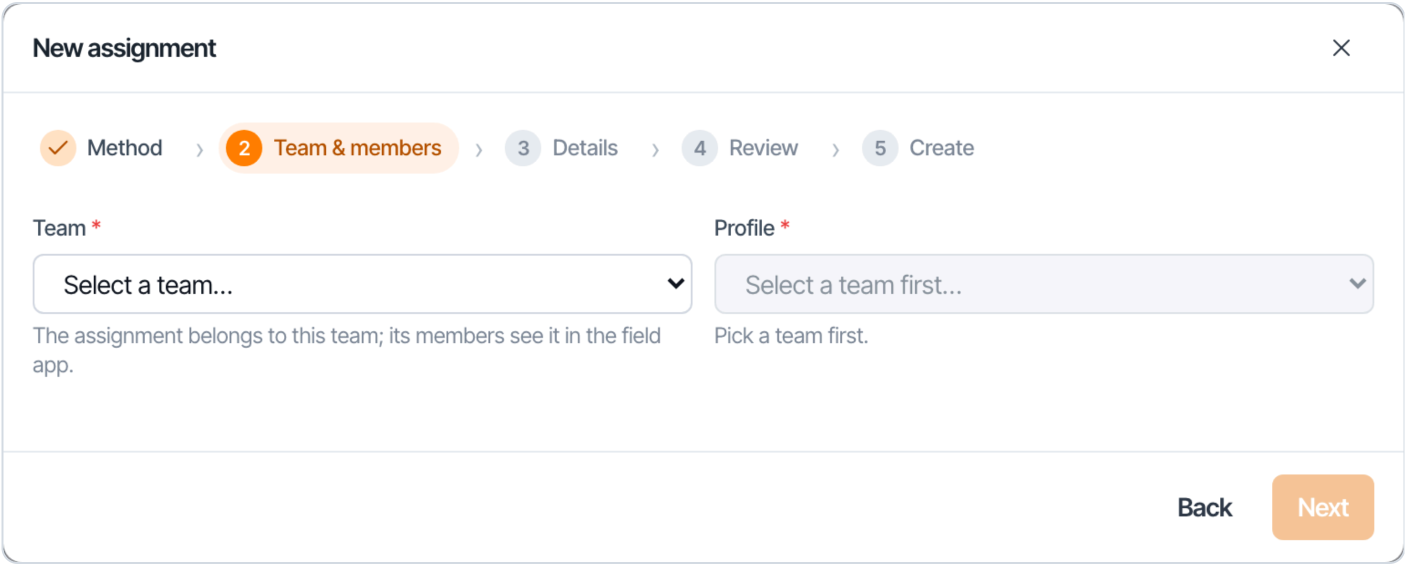
Choose how to create:



- **Fill out form**: create one assignment by typing in its details.
- **Upload spreadsheet**: create one or many assignments from a `.xls`, `.xlsx`, or `.csv` file. The shape of the sheet decides the outcome:
  - A **form-style sheet** (a block of label/value pairs) becomes **one assignment**.
  - A **table** (a header row with data rows) becomes **one assignment per row**.

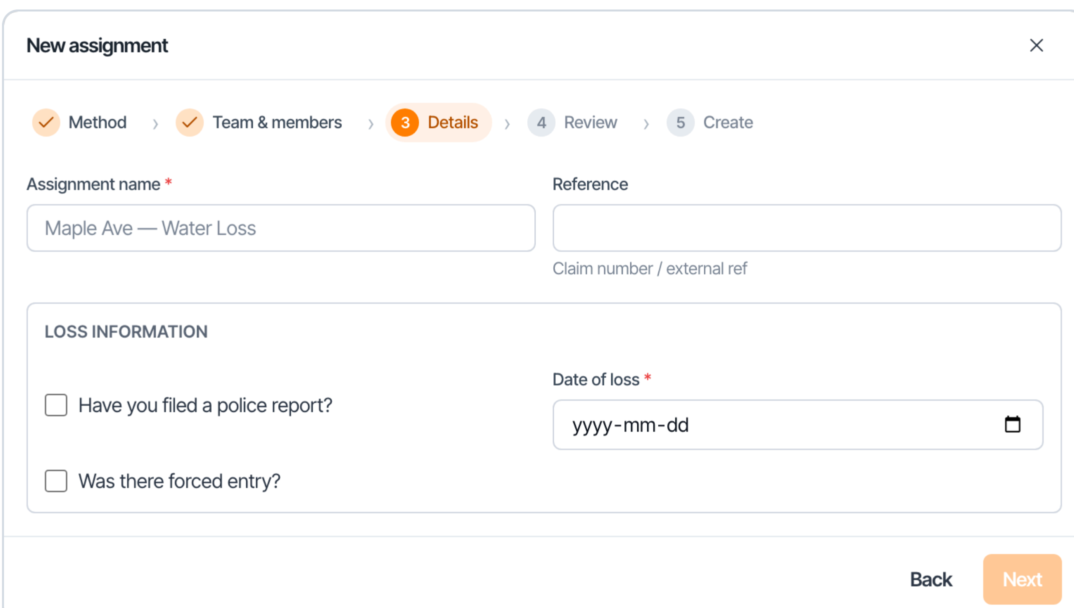
Step 2: Team and members

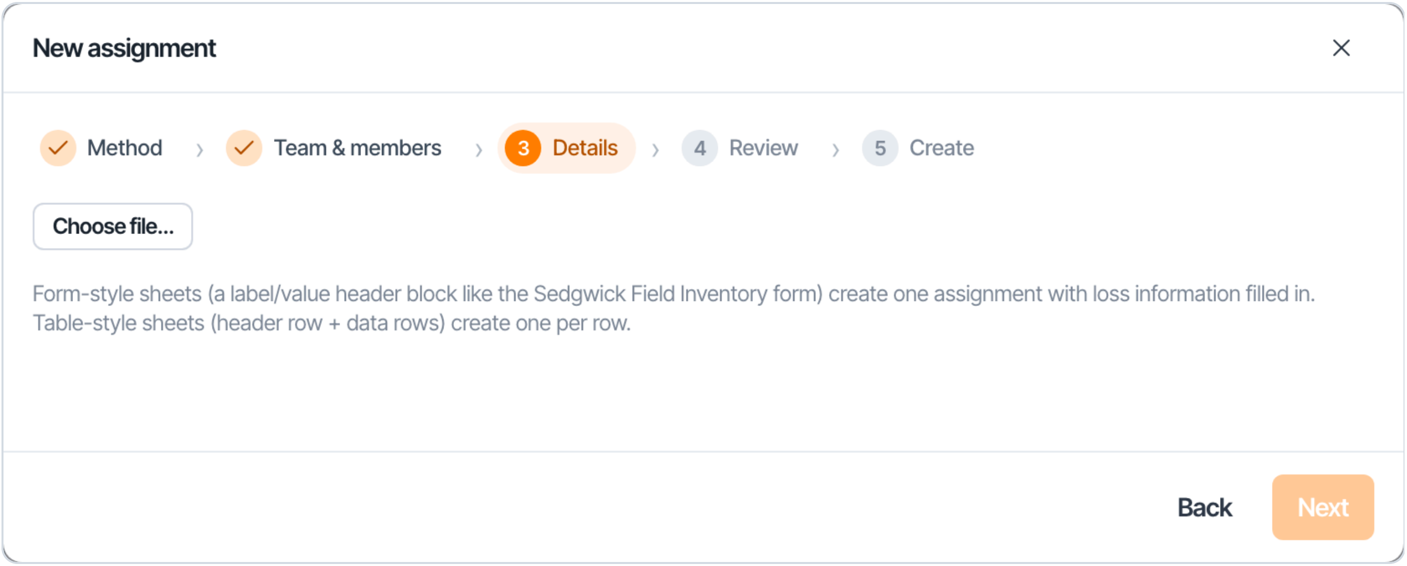
- **Team**: pick the team the assignment belongs to. Its members will see the assignment in the field app.
- **Profile**: pick a capture profile. Only **published** profiles appear, because assignments snapshot the profile's schema at creation. See **Capture profiles**.
- **Members**: every team member is listed and checked by default. Checked members get collaborator access to the assignment. At least one checked member must be a **team lead** (a team admin), so the assignment always has someone responsible for it. You can add an existing user as a team lead, or **invite by email**: the invitee joins as a team admin.



Step 3: Details

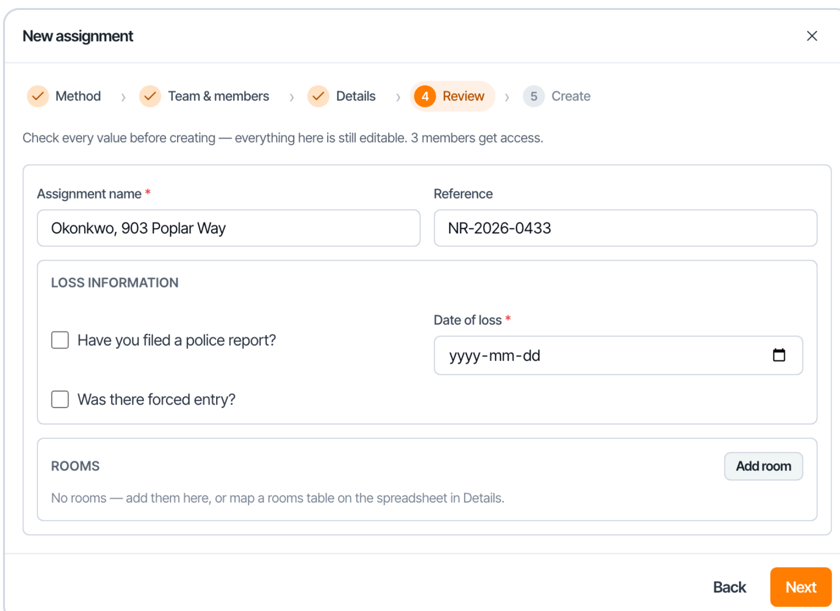
- **Form path**: enter the assignment **Name** (required) and **Reference** (typically the claim number), then fill in the profile's assignment-scoped fields. See **Scope**.
- **Spreadsheet path**: pick the sheet and header row. The wizard auto-detects the sheet shape and offers column mapping with **fuzzy header matching**: spreadsheet headers like "Claim #" are matched to profile fields like "Claim number" automatically, and you can correct any mapping by hand.





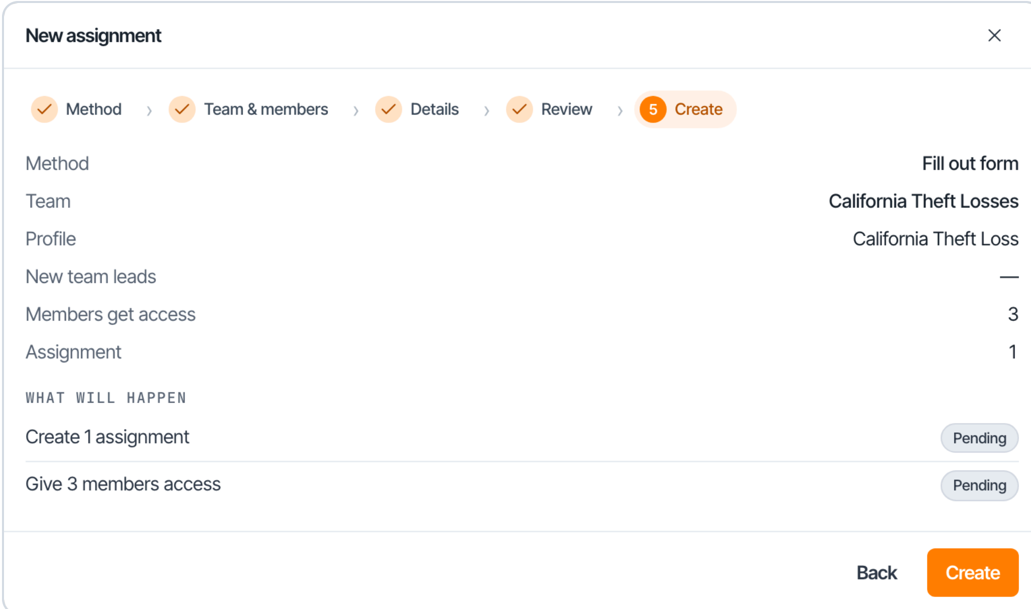
Step 4: Review

Every value from the previous steps is displayed and **editable inline**. Fix typos, adjust mappings, or re-check references before anything is created.

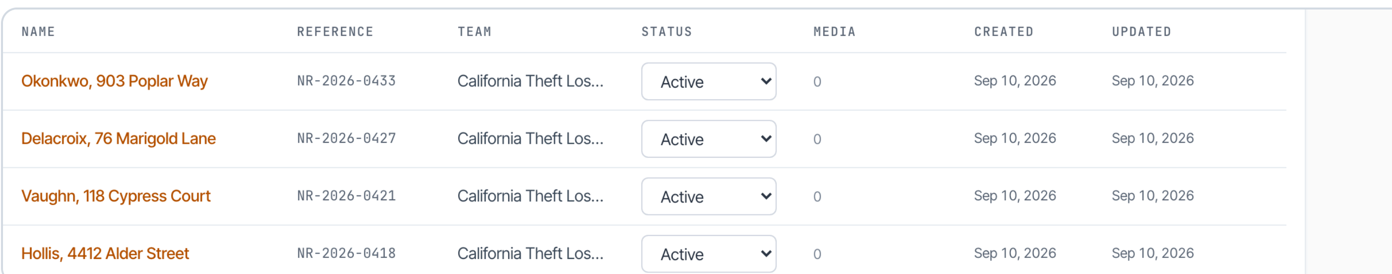


Step 5: Create

Creation runs as an ordered pipeline with per-stage status:



The new assignment appears in the explorer straight away.



NAME	REFERENCE	TEAM	STATUS	MEDIA	CREATED	UPDATED
Okonkwo, 903 Poplar Way	NR-2026-0433	California Theft Los...	Active	0	Sep 10, 2026	Sep 10, 2026
Delacroix, 76 Marigold Lane	NR-2026-0427	California Theft Los...	Active	0	Sep 10, 2026	Sep 10, 2026
Vaughn, 118 Cypress Court	NR-2026-0421	California Theft Los...	Active	0	Sep 10, 2026	Sep 10, 2026
Hollis, 4412 Alder Street	NR-2026-0418	California Theft Los...	Active	0	Sep 10, 2026	Sep 10, 2026

1. Seat leads
2. Create assignments
3. Create rooms
4. Grant access
5. Patch entity values

If something fails partway (a network drop, a service hiccup), the wizard offers **resume-on-retry**: it picks up where it stopped. Created records are real and are never rolled back, so retrying is always safe and never creates duplicates of finished stages.

Bulk import from Settings

For larger batches, go to **Settings → Import assignments from spreadsheets**:

1. Upload multiple `.xls`, `.xlsx`, or `.csv` files at once.
2. Configure each file in its own dialog: crew, sheet, header row, profile, and column mapping with a live preview.
3. Start the batch and watch per-file progress as assignments are created.

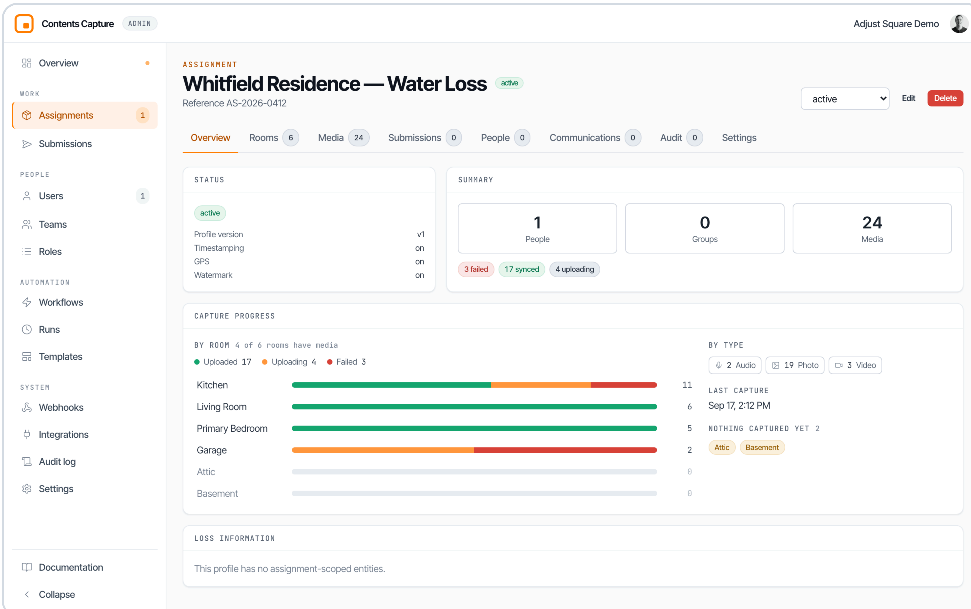
The same card offers a one-shot **Field Inventory (Sedgwick)** profile scaffolding: click it to generate the standard field inventory profile used for Sedgwick-style contents work, ready to publish and use.

Mobile-created assignments

If your org's **mobile app setting** allows it, org, business unit, and team admins can create assignments and manage assignment access directly from the iOS field app. Mobile-created assignments appear on teammates' devices on their next sync and show up in the console like any other assignment.

Assignment detail

Open any assignment to get its own screen, organized as tabs. Every tab carries a count, so the shape of the job is readable before you open anything.



The header shows the name, its status, and the reference. With the `assignment.manage` permission you also get the status dropdown, **Edit** and **Delete**.

Below it sit the job's **tags**. They stay visible on every tab, because how a job is classified is not a detail you should have to go looking for. **Add tag** opens the picker; the small cross on a chip removes one. Editing them needs `assignment.manage`.

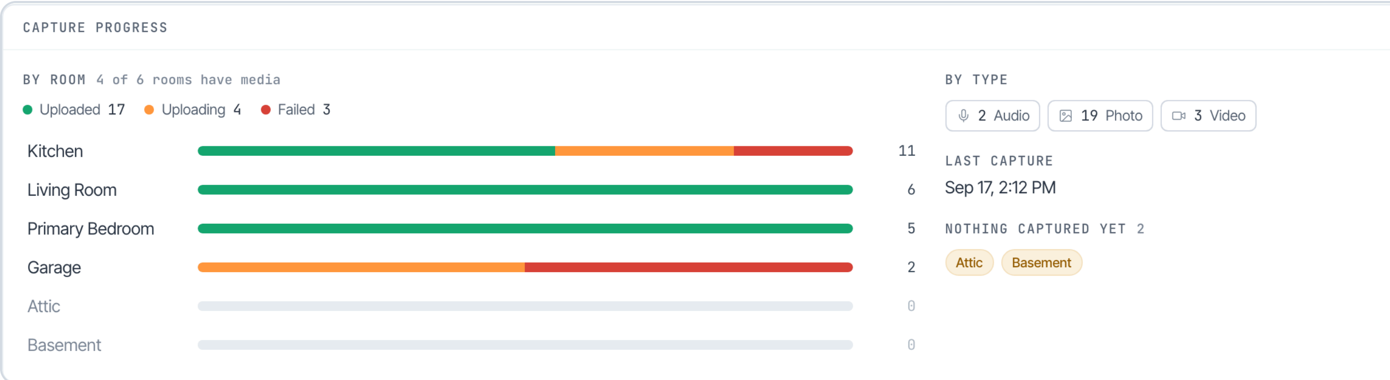
Overview

Four cards.

Status carries the current status, the profile version this assignment was created from, and whether timestamping, GPS and watermarking are on.

Summary counts people, groups and media, with a breakdown by sync state.

Capture progress answers the question the job is usually opened for: what is left to shoot, and is anything stuck.



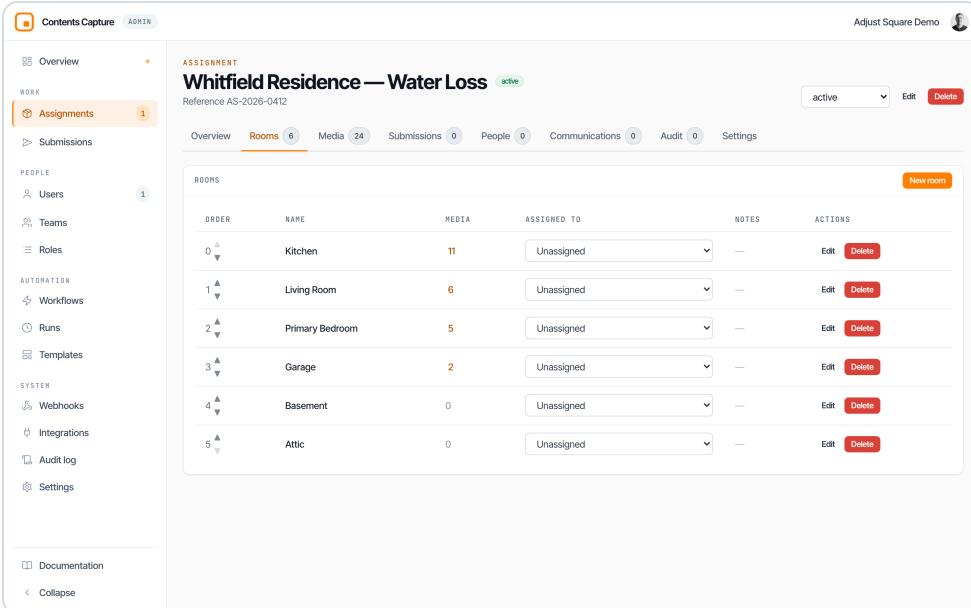
- **By room**: one bar per room, busiest first. Each bar is split by what happened to those items: green for uploaded, orange for still uploading, red for failed.
- Every bar is the **same length** on purpose. The bar describes how far along a room is, not how much it holds; the count sits beside it. A fully uploaded room reads as a complete green bar whether it has 1 item or 20.
- A bar that is part orange or part red is telling you exactly where items are stuck. Red needs somebody to act; orange resolves on its own.
- **By type**: how many photos, videos and voice notes.
- **Last capture**: when anything last arrived, so a stalled job is obvious.
- **Nothing captured yet**: rooms with no media at all. This is the gap list, and usually the fastest answer to what is left.

Click any room to open Media filtered to it.

Loss information holds the profile's assignment-scoped fields. With `assignment.manage` you can edit them inline; every edit is written to the audit log.

Rooms

The rooms captured in, their order, who each is assigned to, and how much media each holds.



The media count is a link: click the number beside a room and Media opens filtered to it. A room with nothing in it shows a plain zero rather than a link to an empty list.

The **Tags** column labels individual rooms: "needs a return visit", "contents only". Tagging a room needs `location.write`, which every member has, so a capturer can label their own rooms. Room tags are independent of the job's, since "needs a return visit" is rarely true of the whole job. See **Tags**.

Rooms can be reordered, renamed, assigned to a person, and deleted. Deleting one never orphans its media: live items move to an "Uncategorized" room first. A room whose media has been submitted is locked.

Media

Every item captured on this assignment. Two layouts, switched at the right of the toolbar.

Cards is a grid of thumbnails that loads more as you scroll. Video and voice-note tiles carry a play badge and their length, so a video is never mistaken for a photo.

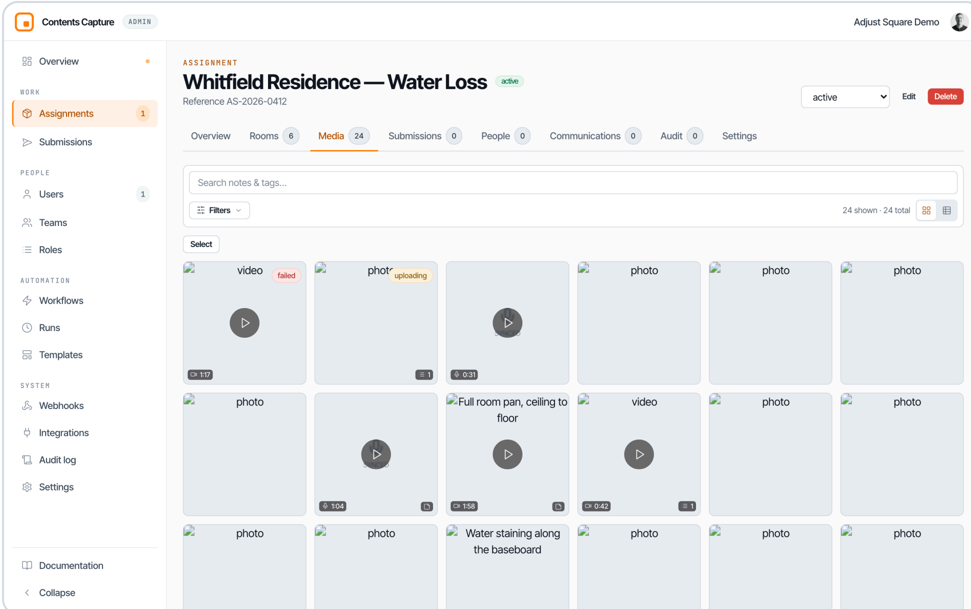
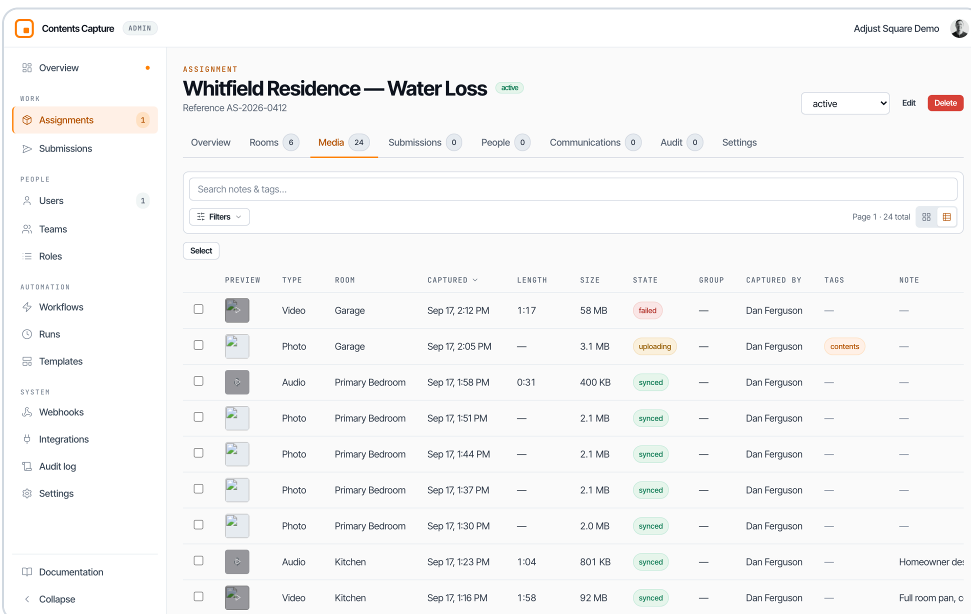
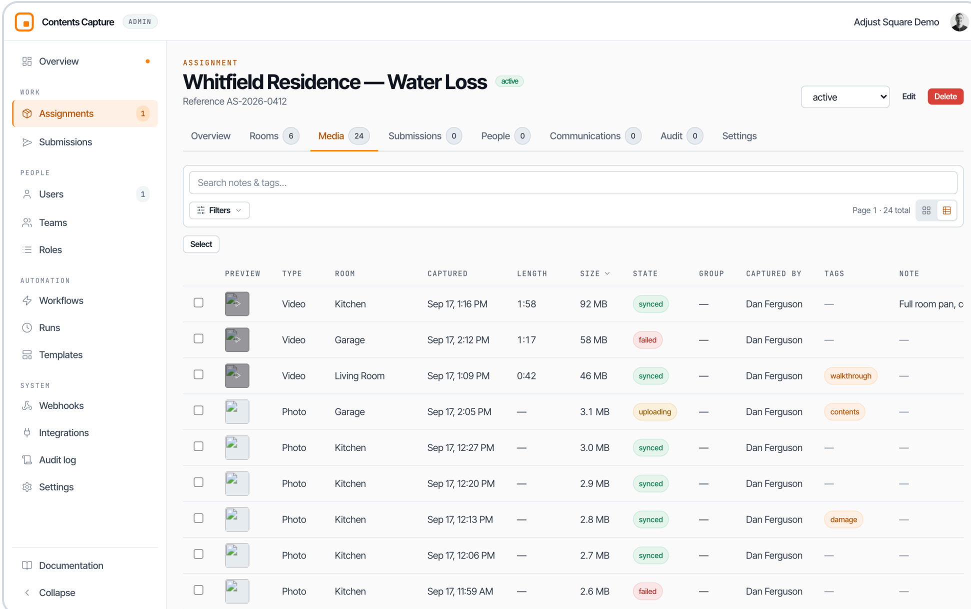


Table lists the same items one per row with their metadata, and pages explicitly.



Click a column header to sort, and again to reverse it. Sorting is done by the server across the whole result set, not just the rows on screen, so "largest" is the largest in the assignment rather than the largest of what happened to load.

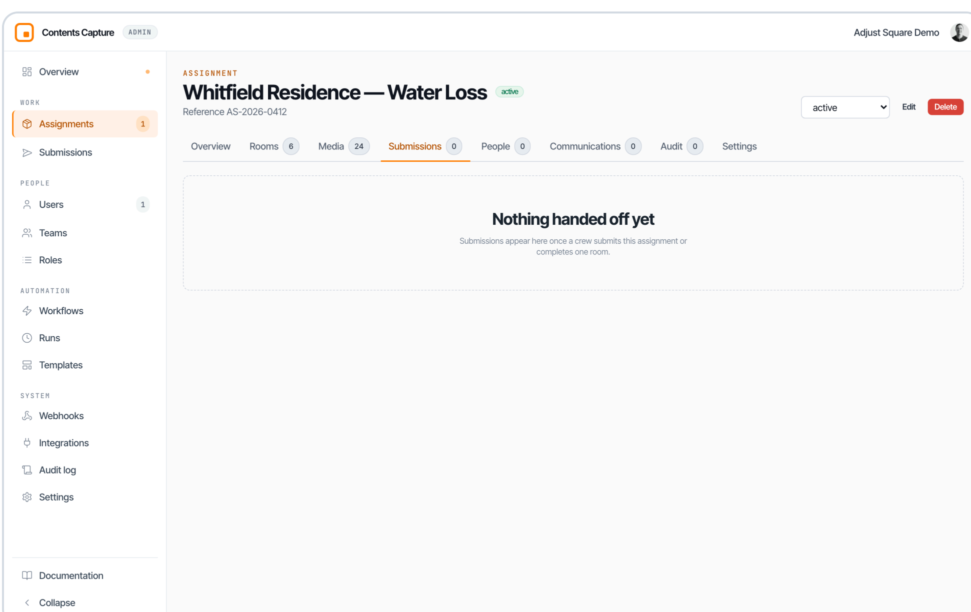


Type, room, capture time, length, size and sync state all sort. Capturer does not: it would only order by a hidden identifier.

Filters cover search, type, sync state, capturer, room, group, **tags** and has-notes. The layout, filters and sort all live in the address bar, so a link opens exactly the view you shared. Full detail in **Submissions and media**.

Submissions

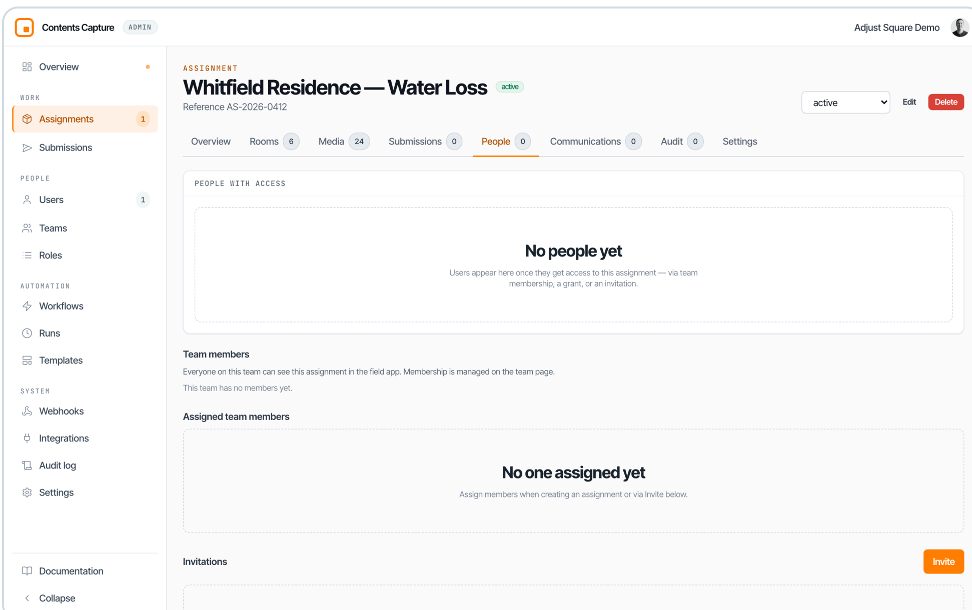
Every hand-off from this assignment, newest first.



Each row gives the submission number, whether it covered the whole assignment or a single room, how many items it carried, who submitted it, when, and from which device and app version. A submission locks the media it names read-only, so this tab is the paper trail for that moment.

People

Who can see this assignment and who is working it, in one place.



The top half is the presence view: each person's role, their capture activity, and their last-known device state. Invited-but-never-signed-in users appear with muted columns.

Below it is access itself: the crew's members, the assigned team members, and the invitations list with invite and revoke, gated on `assignment.access.grant`.

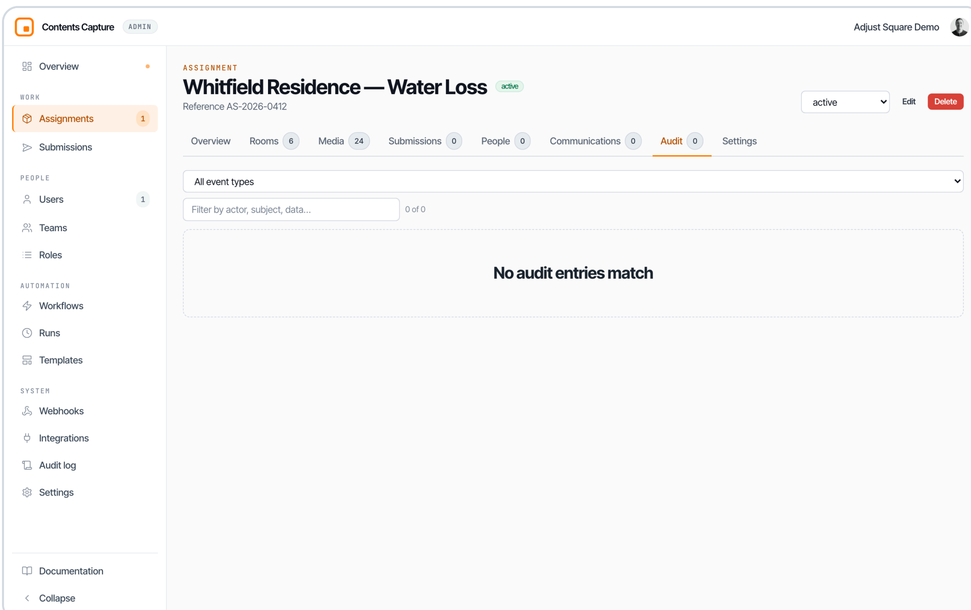
> **These were two tabs**
>
> Access and People answered one question from two sides. Old links carrying `?tab=access` still work and land here.

Communications

Every email and SMS sent for this assignment, with its delivery ladder (sent, delivered, opened, clicked). "Simulated" means the provider is not configured, so nothing actually left the platform.

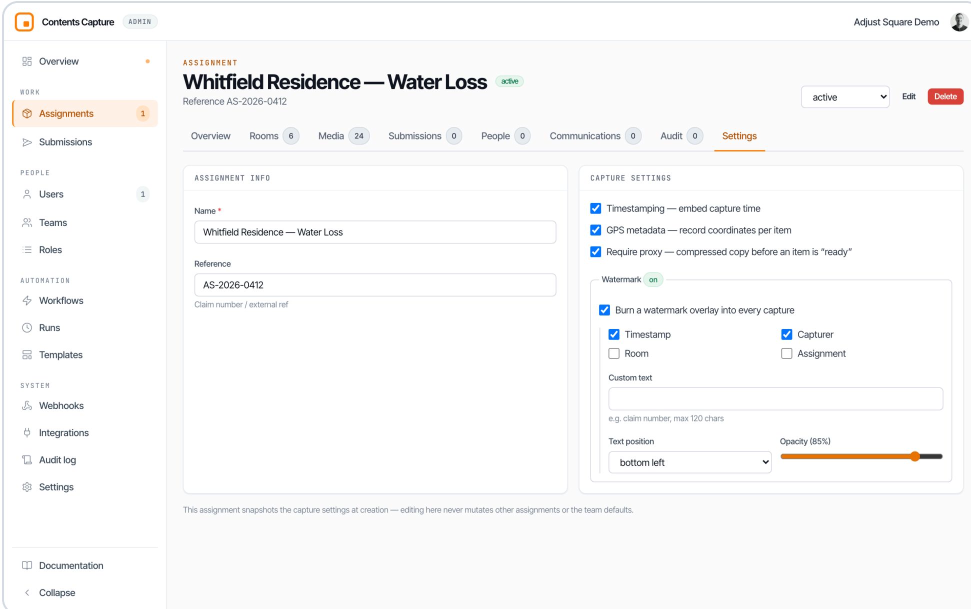
Audit

Everything that has happened to this assignment, filterable by event type and free text.



Settings

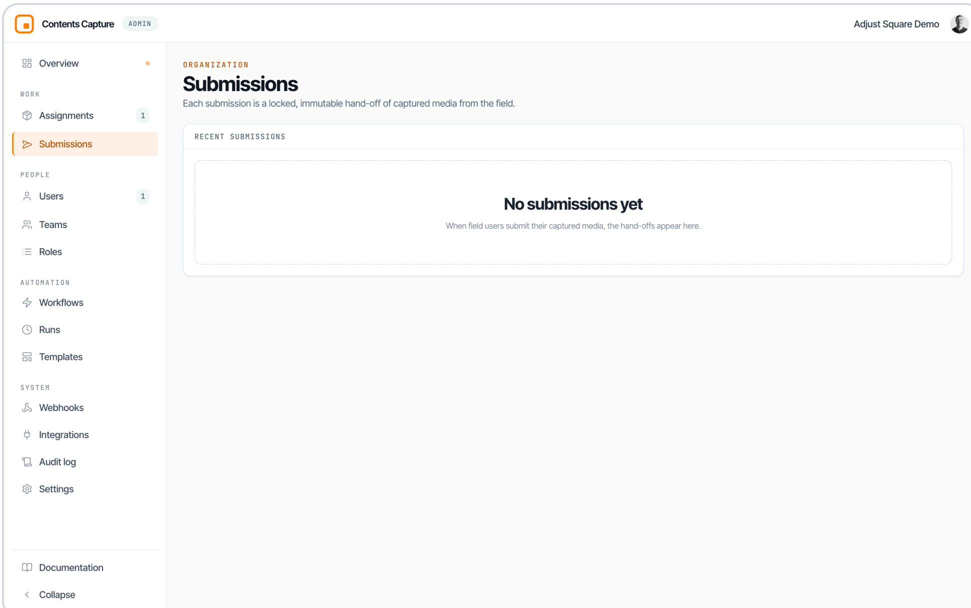
Core information and the capture settings that govern what the app does in the field.



Questions? Email **help@adjustsquare.com** and a human will respond.

Submissions and media

A submission is a locked, immutable hand-off of captured media from the field, and the media browser is where you review everything that has been handed off.



What a submission is

When a field user finishes a unit of work, they submit it. Creating a submission **locks every included item read-only**: the media in a submission can no longer be edited or deleted from the field app. The submission record captures exactly what was handed off, by whom, from which device, and when.

This immutability is deliberate. Submissions are the evidence boundary between field capture and office review, and neither side can alter what crossed that boundary.

The Submissions page

Open **Content → Submissions** to see the most recent hand-offs across your organization.

Column	Meaning
Submission	Sequence number plus a short identifier, for example "#42".
Assignment	The assignment the submission belongs to.
Submitted by	The field user who handed it off.
Items	How many media items are included.
Device	Device model and app version, shown as "v{version} ({build})". Useful when troubleshooting app issues.
When	When the hand-off happened.

Click a row to jump into the assignment detail page for that submission's assignment.

Review philosophy

Reviews happen through assignment status, not per-submission approval buttons. There is no approve/reject/return workflow on submissions, by design: a submission is a permanent record, not a ticket.

The suggested review flow:

1. Field work finishes and submissions arrive. The assignment flips to **submitted** automatically once all media is handed off.
2. Set the assignment to **in review** and work through the media (below).
3. When review is complete, set the assignment to **completed**.
4. When the claim cycle fully closes, set it to **archived** to clear it from working lists.

If new media arrives at any point, the assignment reverts to **active** automatically, which is your signal that review is not actually finished.

The media browser

Open an assignment and go to the **Media** tab.

Cards or table

The toggle at the right of the toolbar switches between two layouts:

- **Cards** is an infinite-scroll grid of thumbnails that loads more items as you scroll, using fast proxy copies so even large assignments stay snappy. Video and voice-note tiles carry a play badge and their length, so a video is never mistaken for a photo.
- **Table** lists the same items one per row with their metadata: preview, type, room, capture time, length, size, sync state, group, capturer, tags, and note. It pages explicitly with **Previous** and **Next** rather than scrolling forever.

Click any column header in the table to sort by it, and click it again to reverse the direction. Sorting is done by the server across the whole result set, not just the rows on screen, so the largest file is the largest in the assignment rather than the largest of what happened to load. Type, room, capture time, length, size, and sync state can all be sorted; capturer cannot.

The layout, the filters, and the sort all live in the address bar, so a link to a media view opens exactly the same view for whoever you send it to.

Filters

Open the filters popover to narrow the grid:

- **Search notes and tags**: free text, matched against item notes and tags.
- **Type**: photo, video, or audio.
- **Sync state**: captured, processing, queued, uploading, synced, or failed. See **Sync states**.
- **Capturer**: who captured the item.
- **Room**: show only the media captured in one room. The **Rooms** tab's media count is a shortcut into this: click the number beside a room and the Media tab opens filtered to it.
- **Groups**: filter by group, including **Ungrouped** for items not in any group.
- **Tags**: facet chips with counts, so you can see at a glance that, say, 34 items are tagged "damage" and click to show only those. Tags are org-wide and shared with assignments and rooms. See **Tags**.

While a filter is on, the toolbar stops showing the assignment's total count, because that number is not what you are looking at.

Select mode and bulk actions

Enter selection mode to check multiple items, then:

- **Tag**: bulk add or remove tags across all selected items. Use tags to mark review outcomes ("reviewed", "needs-recapture", carrier-specific codes) since there are no approval buttons. A workflow can act on those tags the moment they are applied. See **Tags**.
- **Delete**: delete the selected items. Requires the media.delete permission.

> **Deletes are soft deletes**
>
> Deleting media is a soft delete: the item disappears from views, but the underlying file is retained on the server. If something is deleted by mistake, contact support to have it restored.

The lightbox

Click any item to open the full-screen lightbox:

- **Arrow keys** page through items; a counter shows your position ("12 / 348"). Adjacent items are prefetched so paging is instant.
- **Photos open in deep zoom**: zoom into fine damage detail, hairline cracks, serial numbers, and labels that a thumbnail could never show.
- **Watermark toggle**: "Hide watermark (view clean original)" switches from the watermarked review copy to the clean original master. The original master is always clean, even when watermarks are enabled. See **Capture settings**.
- **Video and audio** play inline, using the proxy for speed or the original for full fidelity.

The metadata sidebar

The lightbox sidebar carries everything known about the item:

- Type and sync-state badge
- **Captured**: the timestamp
- **By**: the capturer
- **Duration** (video and audio), **Dimensions** (photos and video), **Original size**

- **Device**: model that captured it
- **Watermark**: "Burned in" state
- **GPS**: a "lat, lng" link that opens the capture location in a map
- **Download original**: downloads the clean master file
- **Tags and Notes**: editable, with **Save changes**
- **Activity**: a per-item timeline of everything that happened to this item

---

Downloading media

Download media per item with **Download original** in the lightbox sidebar. The file you get is always the clean, unwatermarked master.

> **No bulk export today**
>
> There is no bulk zip export or CSV export of media. If you need a large pull of originals for a carrier or legal request, contact support.

Sync states

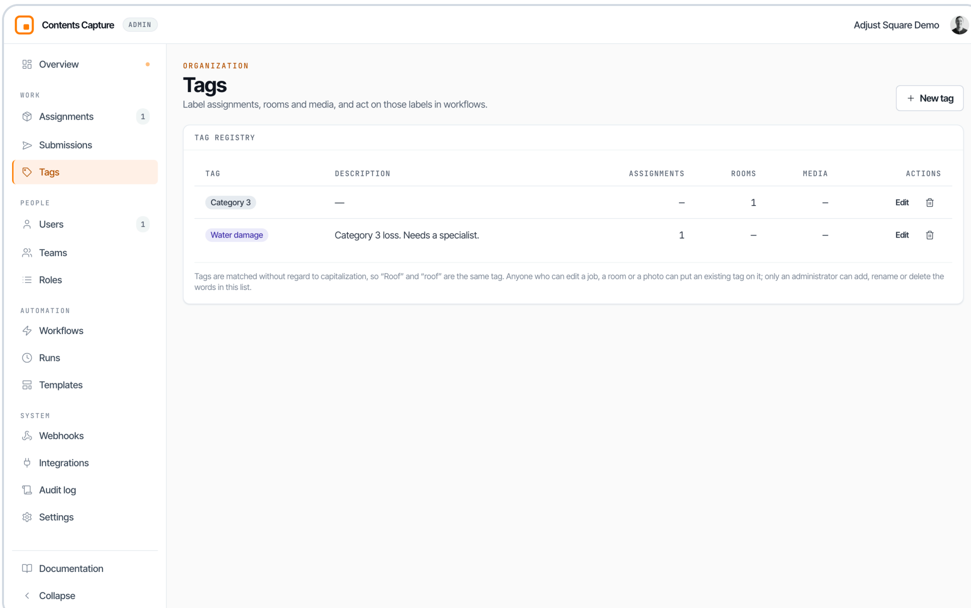
Every media item carries a sync state describing where it is on the path from the device to the server:

State	Meaning
Captured	Recorded on the device, not yet queued for upload.
Processing	The device is preparing the item (for example, generating its proxy).
Queued	Waiting to upload.
Uploading	Upload in progress.
Synced	Safely on the server and visible everywhere.
Failed	The upload failed and will be retried by the app. If an item stays failed, check the field user's connectivity.

Tags

A tag is a word your organization agrees on, stuck to a job, a room, or a photo. Tags are the answer to the questions the fixed fields cannot cover: which jobs are the storm batch, which rooms still need a second visit, which photos the carrier asked about.

They exist because a status can only be one thing at a time, and a claim is many things at once.



Where tags live

Three things can carry tags, and each answers a different question:

You tag	To answer
An assignment	What kind of job is this? Storm batch, large loss, disputed, expedite.
A room	What is special about this space? Needs a return visit, water damage, contents only.
A media item	What is this photo for? Hero shot, serial number, needs recapture.

A tag put on a job does not spread to its rooms or its media. They are independent labels, because "this room needs a return visit" is not true of the whole job.

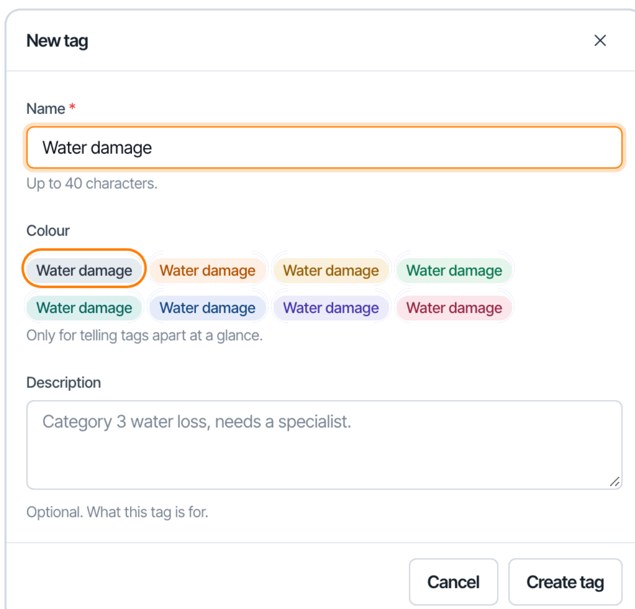
The tag registry

Open **Work → Tags**. Every tag your organization uses is listed here, with a colour, an optional description, and how many assignments, rooms, and media items currently carry it.

The counts are the reason this page exists. Renaming or deleting a tag reaches out and changes every item wearing it, so you should be able to see how many that is before you press the button.

Define a tag

1. Click **New tag**.
2. Give it a name, up to 40 characters.
3. Pick a colour. Colour is only for telling tags apart at a glance; it carries no meaning of its own.
4. Optionally describe what the tag is for. Write this for the person who has to decide whether a job qualifies.



Tags are matched without regard to capitalization

"Roof", "roof", and "ROOF" are the same tag. So are "Water damage" and "water damage" with a double space. You cannot create a second tag that differs from an existing one only in capitalization or spacing, and typing an existing tag in a different case stores the spelling the registry defines.

Punctuation is not folded. "water-damage" and "water damage" are two different tags, because a hyphen is a choice somebody made and guessing it away would rewrite their data.

Tags you never defined

Anyone who can edit a job, a room, or a photo can type a word that has never been used before, and it becomes a tag immediately. It appears in this registry in the default colour, ready for you to recolour or describe.

This is deliberate. Field work does not stop for vocabulary approval, and a registry that disagreed with what is actually on the media would be worse than no registry. You get the complete list of words in use, not a curated subset.

Rename a tag

Click **Edit**, change the name, and save. Every assignment, room, and media item carrying the old name is updated, including on phones the next time they sync. The confirmation tells you how many items changed.

You cannot rename a tag onto a name another tag already has. That would silently merge two vocabularies, and the console refuses rather than guessing that is what you wanted.

Changing only the colour or description touches nothing else.

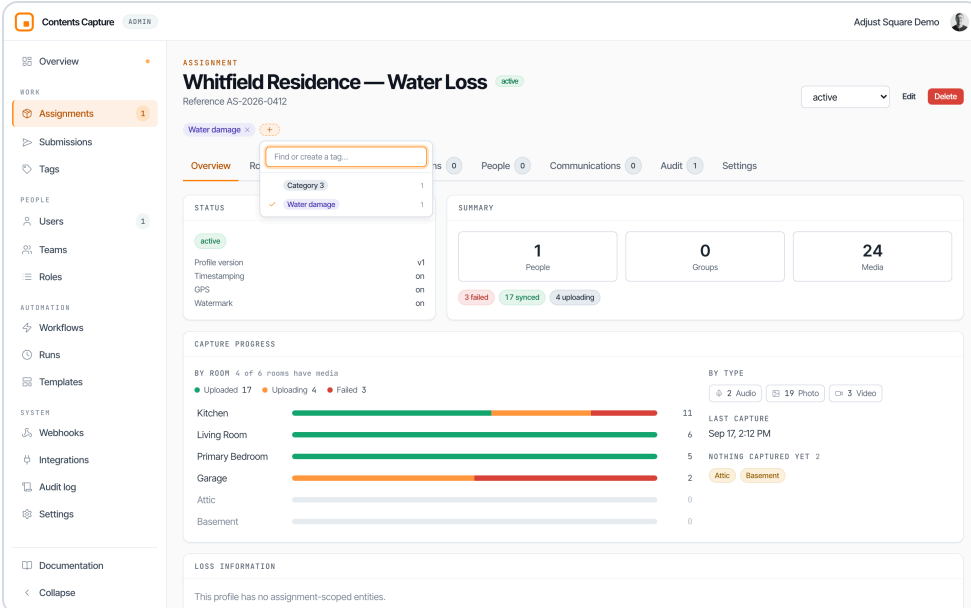
Delete a tag

Click the bin icon. The dialog tells you how many items will lose the tag before you confirm. Deleting really removes it: the tag comes off every item, rather than being left orphaned on a few thousand rows.

> **Deleting a tag can break a workflow**
>
> Any workflow that looks for the tag stops matching, and any workflow that applies it starts creating it again from scratch. Check **Workflows** before deleting a tag that automations use.

Tagging an assignment

Open any assignment. The tags sit under the headline, visible from every tab, because how a job is classified is not a detail you should have to go looking for.



Click **Add tag** to open the picker. It lists your organization's tags with the ones already on this job ticked, and a search box that doubles as a way to create a new one. Click a tag to add it, click it again to take it off, or use the small cross on a chip.

Needs the `assignment.manage` permission.

Tagging a room

Open an assignment and go to the **Rooms** tab. Each room has a **Tags** column with the same picker.

Needs the `location.write` permission, which every member has. A capturer can label their own rooms.

Tagging media

Open an assignment's **Media** tab.

- **One item at a time**: click a photo to open it, and edit its tags in the side panel.
- **Many at once**: click **Select**, tick the items, and use the bulk **Tag** action to add or remove tags across all of them.

Needs the `media.capture` permission.

Finding things by tag

- **Assignments**: the **Tags** filter on the Assignments page, and a **Tags** column you can turn on from **Columns**. Picking two tags widens the list rather than narrowing it: you get jobs carrying either one.
- **Media**: the **Tags** filter in the media browser, which shows counts beside each tag.
- **Search**: typing in the Assignments search box matches tag names as well as job names and references.

Every filter lives in the address bar, so a link to "all the storm-batch jobs" opens exactly that for whoever you send it to.

Who can do what

Action	Permission	Who has it
See the tag list	`media.read`	Everyone, including observers
Put an existing tag on a photo	`media.capture`	Members and above
Tag a room	`location.write`	Members and above
Tag an assignment	`assignment.manage`	Team admins and above
Add, rename, or delete a tag	`tag.manage`	Team admins and above

The split is the point. A capturer can label their own work without being able to redefine the words everyone else's work is filed under.

Tags and the field app

Media tags are shared with the phone. Adjusters tag photos from the app's tag sheet and quick-capture chips, and those tags are the same tags you see and filter on here. A tag an adjuster types in the field appears in the registry like any other.

Assignment and room tags are console-only. The app has no screen for them, and the server ignores any attempt by a device to change them, so a phone that has been offline since before you tagged a job cannot quietly undo it by syncing a room rename.

Media tags follow last-writer-wins

Because both sides can tag a photo, the most recent edit wins. If you tag a photo in the console while the adjuster is offline and they later edit that photo's tags on the phone, their list replaces yours. For labels you need to stay put, tag the assignment or the room instead.

Limits

- A tag name is capped at 40 characters.
- One item can carry up to 24 tags. A workflow cannot grow a job's tag list past that.

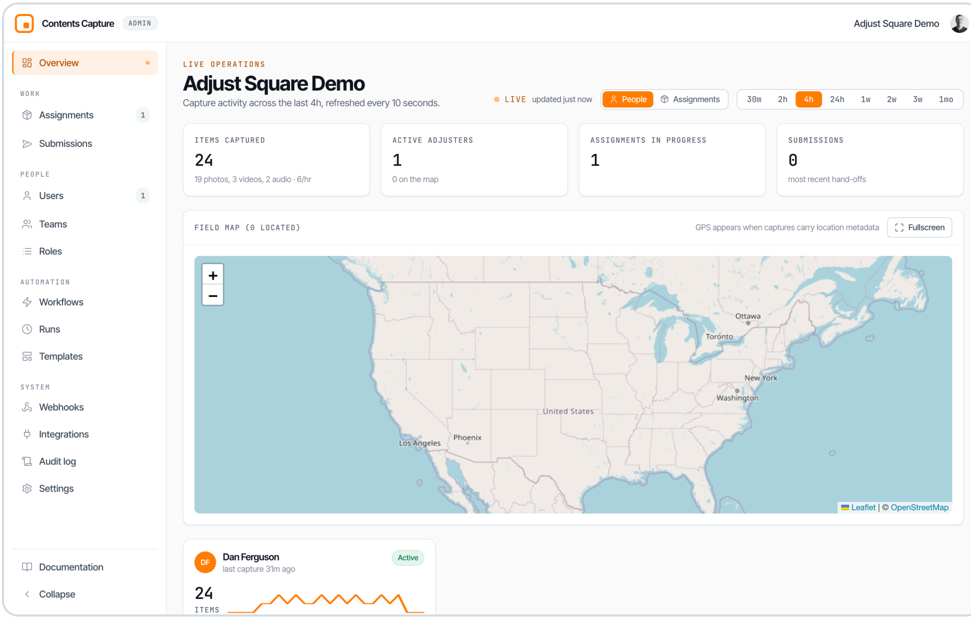
Using tags in workflows

This is where tags stop being labels and start being automation. A workflow can read a tag, act on one being applied, and apply or remove one itself. See **Tags in workflows**.

Questions? Email **help@adjustsquare.com** and a human will respond.

Overview

Overview is the landing screen and the live picture of the field: who is capturing, how fast, on which jobs, and where.



> **This used to be two screens**
>
> Overview and Mission Control showed overlapping information side by side. They are now one screen. The old `/live` address still opens it.

It refreshes every 10 seconds on its own. The dot beside **LIVE** pulses while the feed is current.

The time window

Everything on the page describes one window of time, chosen by the buttons at the top right: 30 minutes through to a month.

A short window answers "what is happening right now". A long one answers "how did this week go". The window is in the address bar, so a link shares the view you were looking at.

The four numbers

ITEMS CAPTURED	ACTIVE ADJUSTERS	ASSIGNMENTS IN PROGRESS	SUBMISSIONS
24	1	1	0
19 photos, 3 videos, 2 audio · 6/hr	0 on the map		most recent hand-offs

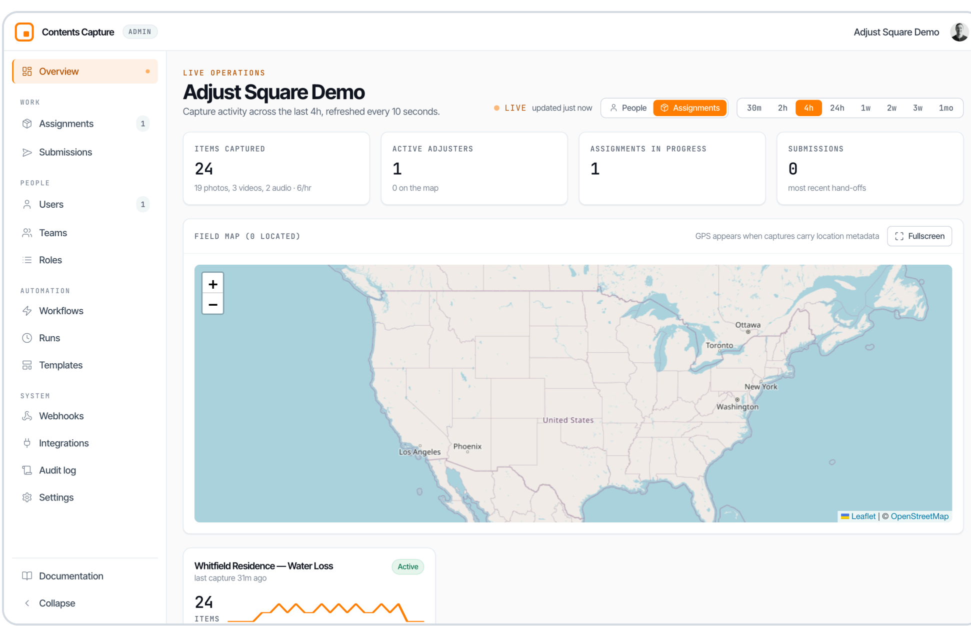
- **Items captured** in the window, split by photo, video and voice note, with the organization's pace per hour.
- **Active adjusters**, and how many of them are on the map.
- **Assignments in progress**: jobs that received at least one capture.
- **Submissions**: the most recent hand-offs to the upstream team.

Grouping: people or assignments

The **People / Assignments** toggle decides how the cards below the map are arranged. It rearranges the same activity rather than changing what is counted, so the totals match either way.

People is one card per adjuster, answering "how is each person doing?".

Assignments is one card per job, answering "how is this job going, and who is on it?" — the thing you cannot see when the board is grouped by person, because one job worked by three people looks like three unrelated cards.



Each assignment card shows the same measures read across everyone working it, then lists the crew with how much each has captured, busiest first. Everyone keeps the colour they have on the map. Click a person to open their activity; click the job title to open the assignment.

The field map

Captures carry GPS when the assignment has location metadata switched on. The map plots each adjuster's most recent fix, coloured per person, with a trail of where they have been.

The map always plots **people**, in both groupings, because a GPS trail is a path somebody walked and several people on one job do not share one. "0 located" means no capture in the window carried a location.

Fullscreen opens the map with a sidebar listing everyone; click a name to pan to them.

Per-adjuster cards

In the **People** grouping, each card shows:

- **Active / Idle**: idle means no capture for more than 10 minutes, or a fifth of the window on longer windows. It does not mean off duty.
- **Items and sparkline**: volume and rhythm across the window.
- **Pace**: captures per hour.
- **Avg gap** and **Median gap**: typical time between captures. A long gap on an active job is worth a phone call.
- **Mix**: the photo/video/voice split.
- **Top assignment**, linked.
- **On map / No GPS**.

Per-assignment cards

In the **Assignments** grouping, each card shows those same measures read across the whole crew, then **N people capturing** with each person's count.

The gaps here are between consecutive captures **on the job**, so a job with a full crew shows a tighter rhythm than any one of its people. That is the point: it describes the job's progress, not one person's habits.

Drilling into a person

Click any adjuster to open their activity panel: their stats for the window, which assignments they have been on, a gallery of their recent captures, and their submissions.

Latest submissions

At the foot of the page, the most recent hand-offs to the upstream team, each linking to its assignment. "What has been handed over" is a different question from "what is being captured", and a manager usually wants both.

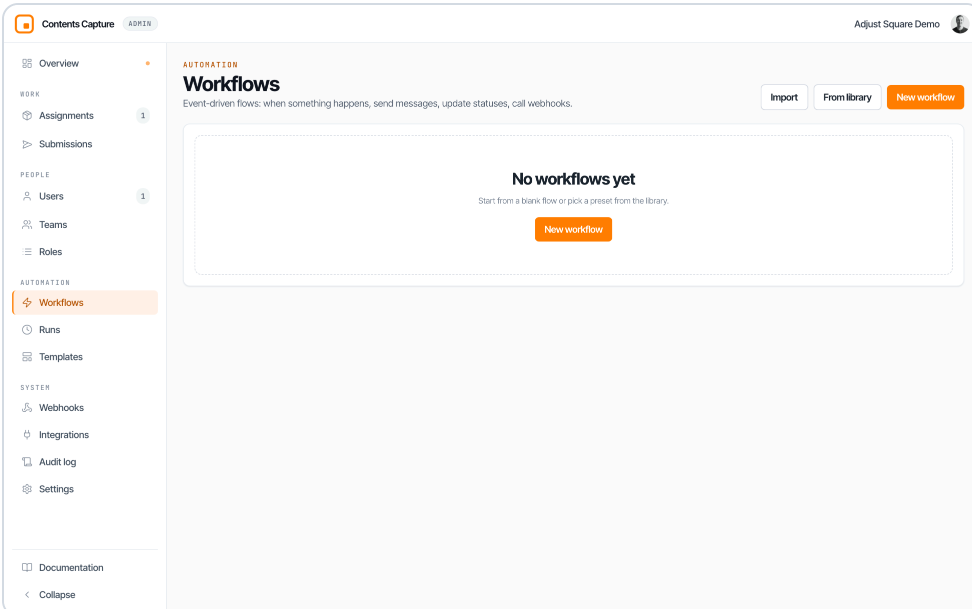
Practical uses

- **Morning check**: 24h window, glance at items captured and active adjusters.
- **Is anyone stuck?** Look for Idle badges and long median gaps.
- **Is this job moving?** Switch to Assignments and read the job's own pace.
- **Where is everyone?** Fullscreen map.

Questions? Email **help@adjustsquare.com** and a human will respond.

Workflows

Workflows are event-driven automations: when something happens in Contents Capture, a workflow can send messages, update statuses, or call webhooks, without anyone lifting a finger.



What workflows are

Every significant thing that happens in your org emits an **event**: an assignment is created, media is uploaded, a submission arrives. A workflow listens for one event, optionally checks conditions, and then runs actions. Three concrete examples:

1. **Submission alert**: when a submission arrives, send an SMS to the team's admins so the desk knows field work just landed.
2. **Status notification**: when an assignment status changes, email the claims inbox with the assignment name, reference, and new status.
3. **System sync**: when media is uploaded, call your own system's webhook so your claim platform stays in sync.

The full list of events workflows can listen to is in Reference → Event types.

The Workflows list

Open **Automation → Workflows**. The page describes itself: "Event-driven flows: when something happens, send messages, update statuses, call webhooks."

Column	Meaning
Name	The workflow name.
Scope	Org-wide, a specific team, or a specific profile.
Enabled	Toggle to turn the workflow on or off without deleting it.
Runs	How many times it has run.
Last run status	Success, partial, or failed.
Updated	When it was last edited.

Row actions: **Edit**, **Duplicate**, **Export** (downloads a `.workflow.json` file), and **Delete** (deleting a workflow keeps its message templates but removes its run history).

Header actions:

- **New workflow**: start from scratch.
- **From library**: start from a preset in the gallery, which is the fastest way to get a proven workflow running.
- **Import**: upload a `.workflow.json` file, handy for moving workflows between organizations or restoring an export.

Viewing the list requires audit.read; creating and editing requires team.manage.

Creating a workflow

The creation wizard walks through five steps:

1. **Template**: start blank or pick a preset.
2. **Basics**: name and describe the workflow.
3. **Scope**: decide whether it applies org-wide, to one team, or to assignments built from one profile.

4. **Trigger**: pick the event that starts the workflow, for example `submission.created`.
5. **Review**: confirm, then open the builder to add conditions and actions.

The builder in plain terms

The builder is a visual canvas where each step is a node connected to the next. You do not need technical knowledge to read one: follow the arrows from the trigger at the top.

The trigger node

Every workflow has exactly one fixed trigger node. It holds the event type and optional **filter rows**, for example "only when the assignment's team is Sacramento CAT Crew". Filters keep workflows quiet so they only fire on the events you care about.

Condition branches

A **Condition** node splits the flow into **true** and **false** branches. Conditions are checks over values from the event, combined with AND, using operators like equals, for example "assignment status equals submitted". The true branch runs when all checks pass; the false branch runs otherwise.

Action nodes

- **Send email / Send SMS**: pick a **message template** or write an inline message. Inline messages support `{{variable}}` chips that insert event data, for example the assignment name or the submitter's name, into the text.
- **Update assignment status**: move the assignment to a new status automatically, for example setting in review when a submission arrives.
- **Tag**: put a **tag** on something, or take one off. See **Tags in workflows** below.
- **Webhook**: send the event to a URL of your choosing. You set the method, headers, and a JSON body template. The request is signed with your org webhook secret when one exists, so the receiving system can verify it came from Contents Capture. See **Webhooks**.

Recipients

Email and SMS steps offer four recipient choices:

- **The actor**: the person who triggered the event, for example the adjuster who submitted.
- **Team admins**: the admins of the relevant team.
- **Assigned crew members**: everyone assigned to the assignment.
- **Custom address**: a specific email address or phone number you type in, such as a shared claims inbox.

Tags in workflows

Tags are the one thing a workflow can both read and write, which makes them the memory an automation otherwise does not have. A status can only be one value; a tag can record that a job has already been escalated, already been chased, already been counted.

Trigger on a tag

Five tag events are available as triggers:

Event	Fires when
`tag.applied`	A tag is put on an assignment, room, or media item.
`tag.removed`	A tag is taken off one.
`tag.created`	A new tag is defined for the organization.
`tag.updated`	A tag is renamed or recoloured.
`tag.deleted`	A tag is deleted.

`tag.applied` is the useful one. Add a trigger filter on `event.data.tags` **contains** the tag name, and you have "when somebody marks a job urgent, do this". The person doing the tagging does not have to know the automation exists.

Branch on a tag

Two condition paths read tags:

- `assignment.tags` : the tags on the job the event belongs to.
- `subject.tags` : the tags on the exact thing the event was about, when that thing can carry tags. On a media event it is the photo; on a room event, the room.

Use the **contains** operator, which matches one tag in the list exactly:

> `assignment.tags` contains `Large loss`

On an event whose subject cannot carry tags (a user, an invitation), `subject.tags` is simply absent, so the condition is false rather than an error.

Apply a tag

The **Tag** action node has three settings:

- **What to tag**: *the assignment* (the job the event belongs to) or *what triggered it* (the exact photo, room, or job the event was about). When you choose "what triggered it" and the event was about something untaggable, the step is **skipped**, not failed, and the run still counts as a success.
- **Action**: add these tags, or remove them.
- **Tags**: picked from your organization's registry, or typed to create a new one.

A tag that is already there, or already gone, is left alone. The step is safe to run repeatedly and reports "already carries" rather than churning the record.

> **A workflow's own tags never retrigger it**
>
> Tags applied by a workflow are recorded as system actions, and system actions never start another workflow. A flow that tags on `tag.applied` cannot spin.

Worked example: escalate and remember

> **When** a submission is created **and** the assignment is tagged `Large loss` **and** the assignment is **not** tagged `Escalated` **then** email the claims desk, **and** tag the assignment `Escalated`.

The last step is what stops the desk being emailed again on the second submission. Without it, the workflow has no way to know it has already fired.

Testing before enabling

Every node has **"Test this step"**, which runs just that step with sample data. You can also fire a **full test run** of the whole flow before enabling it. Test runs are clearly badged in the runs feed so they never look like real activity. Always run at least one full test before turning a workflow on.

Validation

The builder validates the flow as you work and **blocks saving a broken workflow**: loops, unreachable nodes, missing recipients, and unfinished templates are all flagged before the Save button will cooperate. A saved workflow is always a runnable workflow.

Runs

The **Runs** pages show every execution:

- **Automation → Runs**: org-wide feed of all workflows.
- A workflow's **Runs** action: runs for that workflow only.

Both poll every 10 seconds. Columns: **Started**, **Workflow**, **Status** (with a "Test" badge on test runs), **Duration**, **Assignment** link, and an **Error preview** when something went wrong. The **Hide test runs** toggle is on by default in the org-wide feed and off on per-workflow feeds.

Click a run to open the **run detail drawer**: a per-step timeline showing exactly what each node did and where a failure happened. From the drawer you can **replay** a run, which re-executes it, useful after you have fixed whatever made it fail.

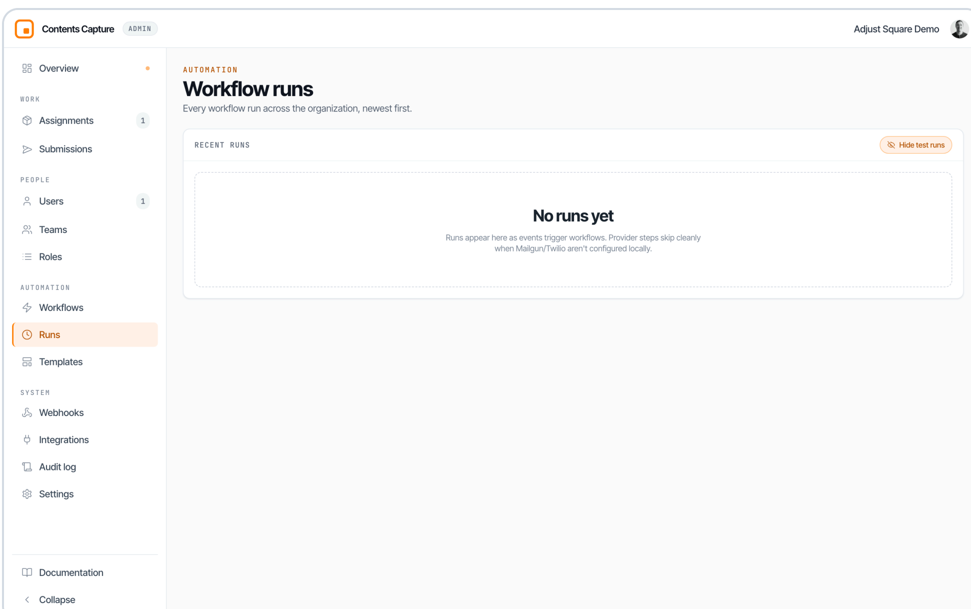
Good first workflows

- **Submission SMS to team admins** (`submission.created`): the classic. The desk knows instantly when field work lands.

- **Status-change email to the claims inbox** (`assignment.status_changed`): keeps the claim file current without manual email.
- **Failure alert** (`media.upload_failed`): notify team admins when uploads fail so connectivity problems get fixed before evidence sits on a device.
- **Webhook to your claim system** (`media.uploaded` or `submission.created`): keep your system of record in sync automatically.
- **Escalate on a tag** (`tag.applied` , filtered to one tag): the desk gets an email the moment anyone marks a job urgent, without having to remember to tell them.
- **Flag stalled uploads** (`media.upload_failed`): tag the assignment `Upload problem` so it shows up in a filtered Assignments view, not just in someone's inbox.

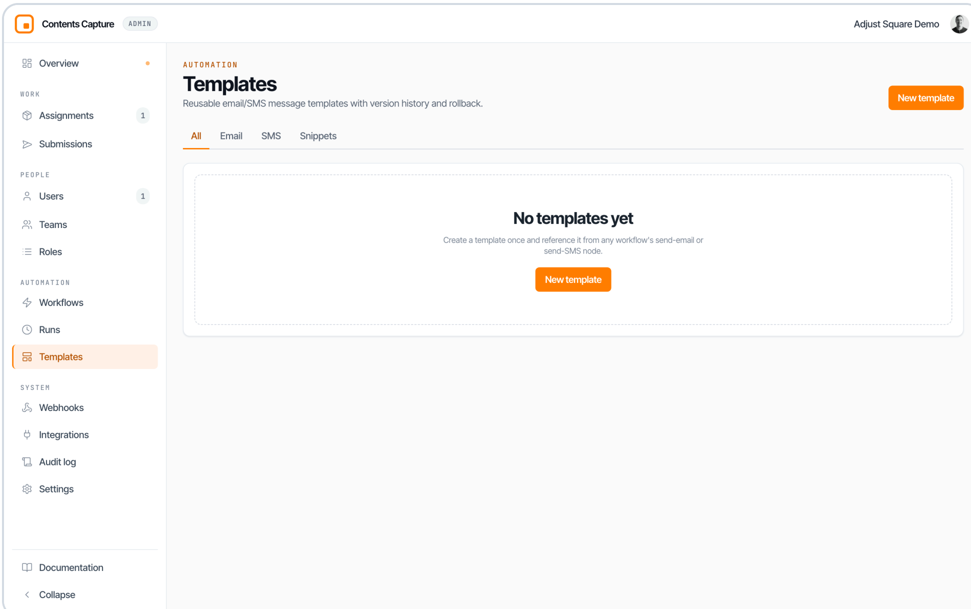
Runs

Runs is the log of every workflow execution: which workflow fired, when, on what, and whether each step succeeded. It is where you look when an automation did not do what you expected.



Message templates

Message templates are reusable email and SMS messages with version history, used by workflow send steps so every automated message reads exactly the way you approved it.



What templates are

A template is a named, versioned message: a channel (email or SMS), a subject for email, and a body with `{{variable}}` placeholders that get filled with real data when a workflow runs. For example, a body containing `Submission received on {{assignment.name}}` sends with the actual assignment name in place of the placeholder.

Templates live at **Automation → Templates**, described as "Reusable email/SMS message templates with version history and rollback."

Creating a template

1. Click **New template**.
2. Enter a **Name**, for example "Submission alert SMS".
3. Pick the **Channel**: Email or SMS.

4. For email, enter a **Subject**. Subjects support `{{ variable }}` interpolation too.
5. Write the **Body** as plain text, using `{{variable}}` placeholders for dynamic data.
6. Save.

For email, after creating the plain-text version you can design an **HTML version** in the visual editor, which shows a **live preview** as you work. The plain-text body remains the fallback for mail clients that do not render HTML.

Editing and version history

Open a template to edit it in the editor drawer. Every save creates a new **version** (shown as v1, v2, and so on in the list). The drawer includes the full version history with **rollback**: pick any earlier version and restore it.

This makes templates safe to experiment with. Try a new wording, watch how it reads in real workflow runs, and roll back instantly if the old version was better.

SMS rules

SMS templates are validated strictly:

- **Plain text only.** No HTML.
- **No emoji or non-Latin characters.** SMS messages containing emoji or characters like Chinese or Japanese text are rejected, because carrier handling of those characters is unreliable and can garble the message or inflate segment counts.

Keep SMS bodies short and factual: what happened, on which assignment, and what to do next.

Using templates in workflows

In a workflow's **Send email** or **Send SMS** step, pick the template from the template picker instead of writing an inline message. Using a template means:

- The wording is maintained in one place, even if many workflows send it.
- Editing the template updates every workflow that uses it, with no workflow edits needed.

- Version history gives you an audit trail of exactly what message was in force at any time.

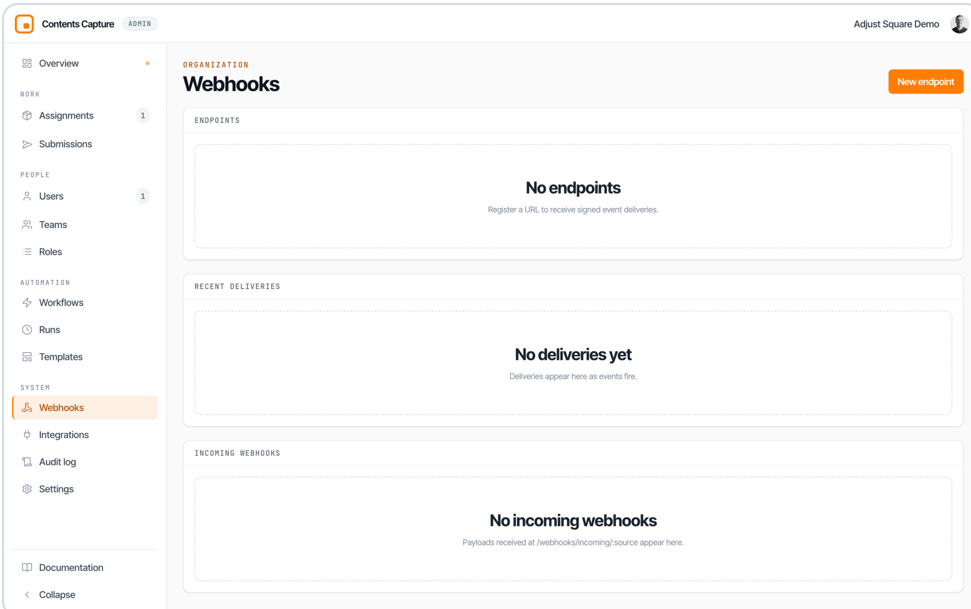
See **Workflows** for the send-step configuration.

Managing the list

The Templates page has three tabs: **All**, **Email**, and **SMS**. The table shows each template's **Name**, **Channel**, current **Version** (v{n}), and when it was last **Updated**. Deleting a workflow never deletes the templates it used; templates are shared resources that outlive any single workflow.

Webhooks

Webhooks let Contents Capture push events to your own systems: when something happens in your org, the platform sends an HTTP POST to a URL you control, signed so you can verify it really came from us.



Who this page is for

This page is for whoever manages your integrations, typically an IT contact or a developer at your company or a vendor. Managing webhooks requires the webhook.manage permission, held by org admins only. Find the page at **System → Webhooks**.

Endpoints

An **endpoint** is a URL that receives events. The Endpoints card lists every endpoint with its URL, subscriptions, and status.

Creating an endpoint

1. Click to create an endpoint.
2. Enter the **Endpoint URL**, the address of your receiving system.

3. Choose subscriptions: either **Subscribe to all events (*)** or check individual event types from the list. The full catalog is in Reference → Event types.
4. Save.

Copy the signing secret immediately

When an endpoint is created, its **signing secret is shown once**. Copy it and store it somewhere safe right away. After you close the dialog, the console only shows a hint like "...a3f9", and there is no way to retrieve the full secret. If you lose it, you must rotate to a new endpoint.

Managing endpoints

Per endpoint you can:

- **Edit**: change the URL or subscriptions.
- **Activate / Archive**: pause delivery without deleting the endpoint, then resume later.
- **Delete**: remove the endpoint entirely.

The payload and signature

Every delivery is a POST with a JSON body containing:

- **event**: the domain event, with its id, type, actor, organization, subject (kind and id), data payload, timestamp, and an idempotency key.
- **deliveryId**: a unique id for this delivery attempt.
- **signedAt**: when the delivery was signed.

The request carries an **X-CC-Signature** header containing an HMAC-SHA256 signature computed with your endpoint's signing secret. Verify this signature in your receiving code before trusting the payload; it proves the request came from Contents Capture and was not tampered with in transit.

Event types

There are 33 org-visible event types grouped by area: assignments, users, invitations, access, locations, groups, people, media, submissions, profiles, webhooks, and integrations. The complete table with plain-language descriptions is in **Reference → Event types**. The same events also drive **workflows**, so what you can automate in the console, you can also receive externally.

Recent deliveries

The **Recent deliveries** card shows what actually happened on the wire:

Column	Meaning
When	Delivery time.
Endpoint	Which endpoint was called.
Status	Delivered, failed, or pending.
Response code	The HTTP status your server returned, for example 200 or 500.
Attempts	How many delivery attempts were made.
Last error	The most recent failure detail.

Click a row to open the **Delivery detail drawer**, which shows the exact request headers and body and the exact response headers and body. When an integration misbehaves, this drawer is the first place to look: it tells you whether the problem is your server's response, a network issue, or the payload itself.

Incoming webhooks

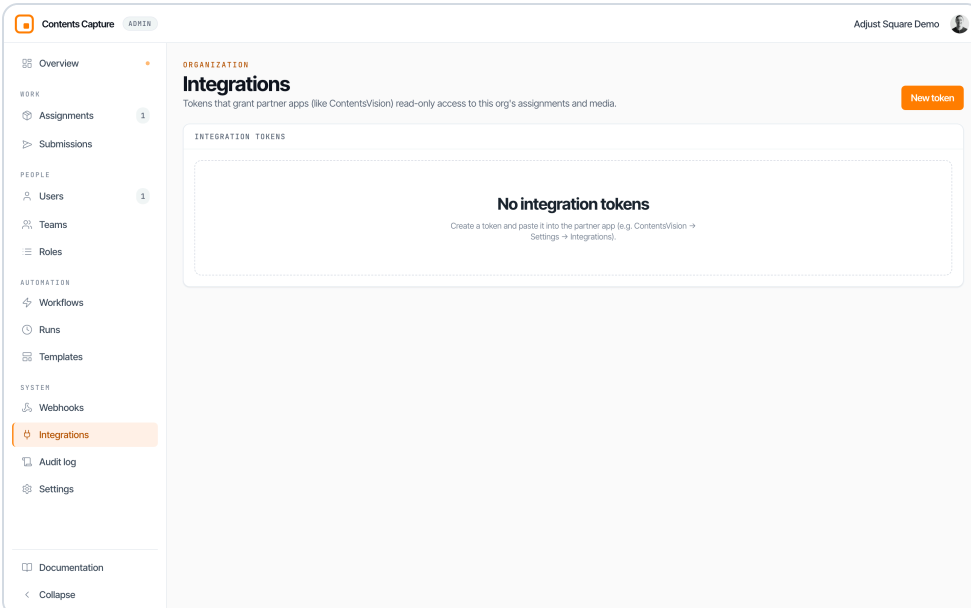
The traffic is not only outbound. The **Incoming webhooks** card lets other systems POST payloads to Contents Capture at `/webhooks/incoming/:source` , where the source identifies the sending system. The card lists received payloads (when, source) with a **View** action opening a drawer containing the full payload JSON, so you can confirm exactly what external systems are sending in.

Good practices

- **Respond fast.** Your endpoint should return a 2xx response quickly and do heavy processing asynchronously. Slow responses look like failures and trigger retries.
- **Always verify the signature.** Check X-CC-Signature against your signing secret before acting on any payload.
- **Use the idempotency key.** Retries and replays can deliver the same event more than once. Store processed idempotency keys and skip duplicates so a retried delivery never creates duplicate records on your side.
- **Watch the deliveries feed after changes.** Any time you edit an endpoint URL or your receiving code deploys, check Recent deliveries for a spike in failures.

Integration tokens

Integration tokens are read-only access keys that let partner applications, such as ContentsVision, read your organization's assignments and media.



What integration tokens are

Some partners and internal tools need to pull your data programmatically: a contents valuation platform reading items and photos, or an internal reporting pipeline. An integration token is a bearer token the partner app presents with each request. Tokens are **read-only**: a partner app holding one can read assignments and media but can never create, change, or delete anything.

Managing tokens requires the integration.manage permission, held by org admins only. Find the page at **System → Integrations**.

Creating a token

1. Click to create a new token.
2. Enter a **Name** that identifies the partner app. The default suggestion is "ContentsVision".
3. Save and **copy the token immediately**.

Tokens are shown once

Like webhook signing secrets, the full token is displayed only at creation. After the dialog closes, the list shows just the token prefix. If you lose the token before handing it to the partner, revoke it and create a new one.

Scope

Every token grants the `media.read` scope **across every assignment in this org**. The creation dialog states this plainly: "The token grants read-only access (media.read) to every assignment in this org." There are no narrower scopes today, so issue tokens only to partners you trust with org-wide read access.

The tokens table

Column	Meaning
Name	The label you gave the token.
Token prefix	The first few characters, enough to identify which token is which.
Scopes	What the token can do (media.read).
Status	Active, expired, or revoked.
Last used	When the partner app last presented this token. A token that has not been used in months is a revocation candidate.
Created	When the token was issued.

Revoking a token

Click **Revoke** on a token's row and confirm. The confirmation warns: "The partner app loses access immediately."

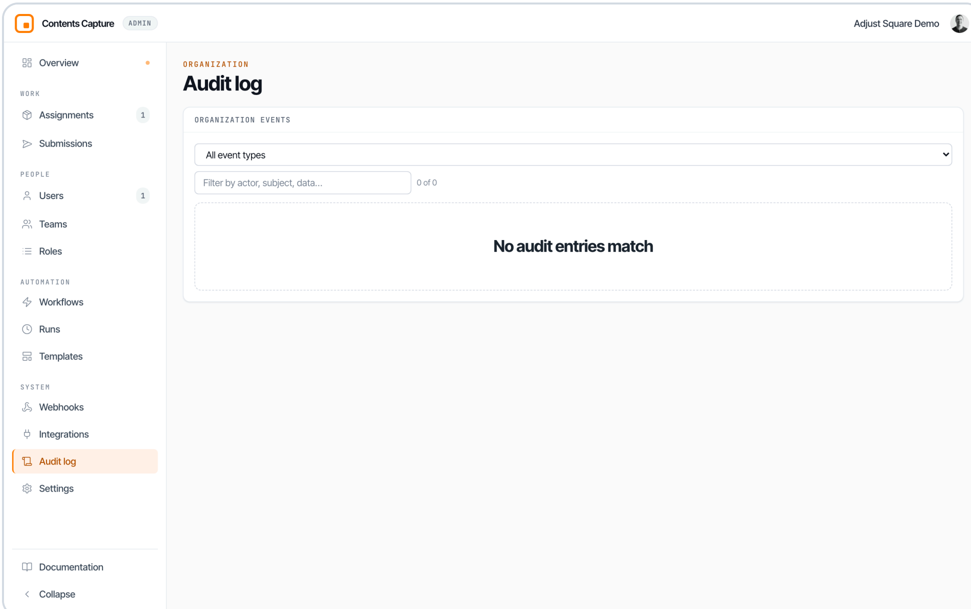
Revocation is immediate and cannot be undone. The partner's next request fails, and there is no grace period. If the partner still needs access, create a fresh token and deliver it through a secure channel.

Security guidance

- **Store tokens in a secrets manager**, not in email, spreadsheets, or chat messages.
- **Rotate regularly.** Create a new token, give it to the partner, confirm their switch-over, then revoke the old one.
- **Revoke unused tokens.** Check the Last used column quarterly; anything idle for months should go.
- **One token per partner.** Never share a token between two apps. Separate tokens let you revoke one partner without disturbing another, and the audit trail shows which token made which request.
- **Treat a leaked token like a leaked password.** If a token may have been exposed, revoke it immediately and issue a replacement.

Audit log

The audit log records every significant action in your organization: who did what, to what, from where, and when.



What the audit log records

The log captures the full event stream of your org, including:

- Captures, uploads, and media edits and deletes
- Assignment creation, edits, status changes, and deletes
- Invitations sent, accepted, and revoked
- Access grants and revocations
- Profile lifecycle events (created, published, archived)
- Webhook endpoint and integration token changes
- Denied actions: attempts that were blocked by permissions, flagged with a red **denied** badge

Every entry carries the **actor** (who did it), the **subject** (what it happened to), structured **data** (including diffs showing what changed), the **source** (mobile, api, webhook, or system), the **IP address**, and the **user agent** (the device or browser used).

Who can see it

Viewing the audit log requires the audit.read permission, held by org admins, business unit admins, and team admins. Members, collaborators, and observers never see it.

Using the page

Open **System → Audit log**.

- **Filters**: an event-type dropdown with friendly labels (for example "Assignment status changed" rather than a raw code) plus a free-text filter that matches across actor, subject, and data.
- **Counter**: "{n} of {total}" shows how many entries match your filters.
- **Columns**: **When**, **Event** (a friendly label badge with detail, plus the raw event type in monospace), **Actor** (name, falling back to email, phone, or a short id; system actions show "System"), **Subject** (kind and id), and **Source** (mobile, api, webhook, or system).
- **Load more**: the log pages forward as you need older entries.

The event detail dialog

Click any row to open the detail dialog:

- The friendly label and a plain-language detail line, for example "Status changed to in review".
- **When, Actor, Source, Event type, Subject, IP**.
- A **"What happened"** per-system breakdown for actions that touched external systems: sign-in identity (Clerk), app install invitations (TestFlight), or infrastructure (Cloudflare), each with its request and response and action badges.
- **Warnings** when part of an action did not fully succeed.
- A collapsible **Raw event JSON** block for support escalations.

Assignment-scoped audit

Every assignment has its own **Audit** tab showing only the entries for that assignment. Use it for claim-level questions ("who changed this status?") without filtering the org-wide log. See **Assignment detail**.

Impersonation

Platform support staff can impersonate users to diagnose problems, and every impersonated action is recorded in the audit log like any other action, with impersonation start events logged as well. If you ever see activity you do not recognize, the log will show whether it came from a support session.

Use cases

- **Dispute resolution.** "Who deleted this photo?" Filter by the media item and see the actor, the device, and the exact time.
- **Carrier questions.** When a carrier asks when documentation was captured or altered, the log plus the immutable submissions give you a defensible answer.
- **Security review.** Audit access grants, invitation activity, and denied actions to confirm your permission model is holding.
- **Integration debugging.** Webhook and integration entries show exactly when partner-facing events fired.

Organization settings

The Settings page holds org-wide configuration: organizations, mobile app permissions, terminology, assignment visibility, spreadsheet import, capture settings summaries, and platform integrations.

Find it at **System → Settings**.

Organizations card

Create, switch, rename, and delete organizations. Covered in full in **Structure and terminology**.

Mobile app card

A single checkbox: **"Let org, business unit, and team admins create assignments and manage assignment access from the mobile app"** (default: **on**).

When on, admins in the field can spin up assignments and grant access from their iPhones, which is valuable during catastrophe responses when nobody is at a desk. Turn it off if your operation requires all assignment creation to go through the office console, for example when assignments must follow a strict intake process.

Terminology card

Rename the eight nouns the platform uses (business unit, team, assignment, and location, singular and plural). Applies to both the console and the mobile app. Covered in **Structure and terminology**.

Assignment visibility card

A role-by-status checkbox matrix controlling **which assignment statuses each role sees in the mobile app**:

- Rows: team admins, members, collaborators, observers.
- Columns: the assignment statuses (draft, active, in review, submitted, completed, archived).

Check a box to let that role see assignments in that status on their devices. Uncheck to hide them.

Key behaviors:

- **Org and business unit admins always see every status**, regardless of the matrix.
- **All boxes checked means no restriction**, which is the default.
- **The server enforces this in sync.** Hidden assignments are never sent to the device, so the restriction cannot be bypassed from the app.

A common setup: hide **draft** and **archived** from members and collaborators so field staff only see work that is actually live.

Import assignments from spreadsheets

Bulk-create assignments from multiple spreadsheet files with per-file column mapping and a progress view, plus the one-shot Field Inventory (Sedgwick) profile scaffolding. Covered in **Assignments**.

Capture settings by team

A summary card showing each team's watermark and GPS status, with links into each team's Settings tab. Use it as a quick compliance check: if a carrier requires watermarks on a given team's work, this card confirms at a glance whether that team's defaults comply. The settings themselves are documented in **Capture settings**.

System integrations

Platform-level email and SMS delivery settings:

- **Mailgun**: API key (write-only, never displayed back), domain, from address, and a **test email** button.
- **Twilio**: Account SID, auth token (write-only), from number in E.164 format, and a **test SMS** button.

These values power the email and SMS steps in **workflows** and message delivery generally. Values stored here override environment defaults.

Platform-level settings

System integrations are a super-admin, platform-level concern. Most organizations never touch this card; delivery is configured for you. If your workflows' emails or SMS messages are not arriving, contact support rather than changing these values blindly.

What is not here

So you do not hunt for them: the console currently has **no retention controls, no storage quotas, and no sync-policy or upload-quality settings**. Media retention is not time-limited, and capture quality is managed by the field app itself. If your organization has compliance requirements around retention, raise them with support.

Field types

Capture profiles support 15 field types. This page is the complete reference; for how fields fit into profiles, see **Capture profiles**.

All 15 types

Type	What the field user sees/does	Options you can set	Example use
text	A single-line text box.	Required, help text, min/max length, pattern, conditional visibility	Claim number, policyholder name
long_text	A multi-line text area for narratives.	Required, help text, min/max length, conditional visibility	Loss description, adjuster notes
number	A numeric keypad entry.	Required, help text, min/max value, conditional visibility	Number of rooms affected, quantity of an item
currency	A money amount entry.	Required, help text, min/max value, conditional visibility	Estimated item value, deductible
boolean	A yes/no toggle.	Required, help text, conditional visibility	"Utilities shut off?", "Pre-existing damage?"
date	A calendar date picker.	Required, help text, conditional visibility	Date of loss, purchase date of an item
datetime	A date picker plus time.	Required, help text, conditional visibility	Exact time of incident, inspection appointment
select	Pick one option from a list.	Required, help text, options list, conditional visibility	Cause of loss, room type, condition rating
multiselect	Pick any number of options from a list.	Required, help text, options list, conditional visibility	Damage types present, services required

Type	What the field user sees/does	Options you can set	Example use
phone	A phone number entry.	Required, help text, conditional visibility	Policyholder contact number
email	An email address entry.	Required, help text, conditional visibility	Policyholder email
barcode	Scan a barcode or QR code with the device camera.	Required, help text, conditional visibility	Appliance serial tags, inventory barcodes
file	Attach a file, captured in the field app.	Required, help text, conditional visibility	Scanned policy document, contractor estimate
media_ref	Reference another captured media item.	Required, help text, conditional visibility	Link an item entry to its photo
signature	Draw a signature on the device screen.	Required, help text, conditional visibility	Policyholder sign-off, authorization to proceed

Options reference

- **Required**: the field must be filled before work can be submitted.
- **Help text**: a hint shown beneath the field in the field app.
- **Min / Max**: numeric bounds, available on number and currency.
- **Min length / Max length / Pattern**: text constraints, available on text-like fields. Patterns are regular expressions for strict formats such as claim numbers.
- **Options list**: the choices offered by select and multiselect fields.
- **Conditional visibility**: show the field only when a rule is met, in the form "When field {sibling} Equals {value}". The rule references a sibling field in the same entity. Example: show "Cause of loss detail" only when "Cause of loss" equals Other.

Notes

- **file, media_ref, and signature are field-app only.** They are captured in the iOS app and appear read-only in the console. You can view their values but not edit them.
- **Keys are auto-generated.** When you type a label like "Loss Information", the key becomes `loss_information` automatically (snake_case: lowercase words joined by underscores). Keys are the stable identifiers used in event data and webhooks.
- **There are no per-assignment photo-count minimums.** If a carrier requires a minimum number of photos per room, enforce it through review practice rather than profile configuration.

Event types

Every significant action in your organization emits one of 33 event types. These events drive both **workflows** (automations inside the platform) and **webhooks** (deliveries to your own systems), so the same catalog applies to both.

Assignments

Event	Fires when	Typical automation use
`assignment.created`	A new assignment is created.	Notify the team that new work is available.
`assignment.updated`	Assignment details (name, reference, fields) change.	Sync changes to your claim system.
`assignment.status_changed`	An assignment moves to a new status.	Email the claims inbox on every status move.
`assignment.archived`	An assignment is archived.	Close out the record in external systems.

Users

Event	Fires when	Typical automation use
`user.created`	A user is added to the org.	Send a welcome message or provision accounts elsewhere.
`user.updated`	A user's name or role changes.	Keep an HR directory in sync.
`user.deactivated`	A user is deactivated.	Revoke access in connected systems.
`user.deleted`	A user is deleted.	Final cleanup in connected systems.

Invitations

Event	Fires when	Typical automation use
`invitation.sent`	An assignment-level invitation is sent.	Log outreach to contractors.
`invitation.accepted`	An invitee accepts access.	Notify the assignment owner their collaborator is in.
`invitation.revoked`	An invitation or grant is revoked.	Confirm access removal for compliance records.

Access

Event	Fires when	Typical automation use
`access.granted`	A person is granted access to an assignment.	Audit trail forwarding to a security system.
`access.revoked`	Access is removed.	Confirm offboarding of a collaborator.

Locations (rooms)

Event	Fires when	Typical automation use
`location.created`	A room is added to an assignment.	Track scope growth on a loss.
`location.updated`	A room's name, order, assignee, or notes change.	Keep external room lists current.
`location.deleted`	A room is soft-deleted.	Flag scope changes for review.
`location.claimed`	A field user claims a room to work it.	See rooms being picked up in real time.

Event	Fires when	Typical automation use
`location.unclaimed`	A claimed room is released.	Spot rooms going back to the pool.
`location.completed`	A room is marked complete.	Track per-room progress toward assignment completion.

Groups

Event	Fires when	Typical automation use
`group.created`	A media group is created.	Mirror organizational structure externally.
`group.updated`	A group changes.	Keep external groupings in sync.
`group.deleted`	A group is removed.	Clean up mirrored structures.

People

Event	Fires when	Typical automation use
`person.created`	A person record is added.	Populate a contacts database.
`person.updated`	A person record changes.	Keep contact details in sync.

Media

Event	Fires when	Typical automation use
`media.captured`	A photo, video, or audio clip is captured on a device.	Real-time capture notifications.

Event	Fires when	Typical automation use
`media.uploaded`	A media item finishes uploading to the server.	Trigger external processing or backups.
`media.upload_failed`	An upload fails.	Alert team admins to connectivity problems.
`media.updated`	A note is added to or edited on a media item. Tag changes fire `tag.applied` / `tag.removed` instead.	Sync review notes to external tools.
`media.deleted`	A media item is soft-deleted.	Record deletions for compliance.

Submissions

Event	Fires when	Typical automation use
`submission.created`	A locked hand-off is submitted from the field.	SMS the team's admins that work has landed.

Tags

Applying a tag fires the event on the thing that was tagged, with `data.tags` listing the exact tag names that changed and `data.assignmentId` carrying the job, so a workflow can trigger on one tag in particular. See **Tags in workflows.**

Event	Fires when	Typical automation use
`tag.applied`	A tag is put on an assignment, room, or media item.	Escalate the moment somebody marks a job urgent.
`tag.removed`	A tag is taken off one.	Clear a downstream flag when review finishes.
`tag.created`	A new tag is defined for the organization.	Mirror the vocabulary into another system.

Event	Fires when	Typical automation use
`tag.updated`	A tag is renamed or recoloured.	Keep an external mapping in step with a rename.
`tag.deleted`	A tag is deleted from the organization.	Warn when a tag an integration depends on disappears.

Workflow-applied tags do not retrigger workflows

A tag applied by a workflow is recorded as a system action, and system actions never start another workflow. A flow that tags on `tag.applied` cannot spin.

Profiles

Event	Fires when	Typical automation use
`profile.created`	A new capture profile draft is created.	Track profile authoring activity.
`profile.published`	A profile is published and becomes usable.	Notify admins a new form is live.
`profile.archived`	A profile is retired.	Stop using the profile in external intake tools.

Webhooks and integrations

Event	Fires when	Typical automation use
`webhook.endpoint.created`	A webhook endpoint is added.	Security monitoring of integration changes.
`webhook.delivery.failed`	A webhook delivery fails.	Page the integrations owner when deliveries break.

Event	Fires when	Typical automation use
`integration.token.created`	An integration token is issued.	Log credential issuance for audit.
`integration.token.revoked`	An integration token is revoked.	Confirm credential retirement.

Same events, two consumers

Everything in this catalog can trigger a workflow in the console and can be delivered to a webhook endpoint. Use workflows for messages and status changes; use webhooks when your own systems need the raw event.

FAQ

Straight answers to the questions admins ask most.

A user cannot sign in. What do I check?

Work through this list in order:

1. Confirm the email or phone on the **Users** page matches what they are typing. Phone numbers must be in E.164 format, for example `+14155550123`.
2. Check the **Identity** column. "Pending" means they have never completed a first sign-in.
3. Have them request a fresh one-time code; codes expire.
4. Check spam and SMS filtering for the code message.
5. If everything looks right but sign-in still fails, contact support with the user's name and the time of the attempt.

Someone left the company. What do I do?

Open **People → Users**, find them, and click **Deactivate**. This removes them from the organization, bans their sign-in, and pulls their mobile app access. Their identity is recoverable if they ever rejoin, and everything they captured and submitted stays intact. See Deactivating a user.

An invitation says pending forever. Now what?

"Pending" means the invitation was sent but never accepted. First confirm the email or phone number is right. There is no resend button: invite the same address again from the assignment's **Access** tab. If the person swears they accepted but the status has not moved, check the assignment's **People** tab to see whether they show any activity, then contact support if the record looks stuck. See Assignment-level invitations.

Can I change a published profile?

No, and that is deliberate. Published profiles are locked server-side so every assignment can prove exactly which fields existed when its media was captured. To make changes, clone the profile (or clone a **reference template**) or create a new version, then publish the new one. Existing assignments keep the version they were created from. See **Lifecycle**.

If I edit capture settings, do old assignments change?

No. Capture settings are snapshotted onto each assignment at creation. Editing team defaults affects only assignments created afterward, and editing one assignment's settings affects only that assignment. History never rewrites itself. See **Snapshot semantics**.

A field user deleted a photo by mistake before submitting. Can we get it back?

It depends on the sync state when it was deleted:

- If the item had already **synced** to the server, deleting is a soft delete and the file is retained on the server. Contact support to restore it.
- If the item was still only on the device (captured, queued, or failed), the server may never have received a copy. Check the media browser filtered by sync state first, then contact support quickly.

Once media is **submitted**, it is locked and cannot be deleted from the field app at all. See **Submissions and media**.

Can I export all media for an assignment at once?

Not today. Downloads are per item via **Download original** in the lightbox sidebar, which always delivers the clean, unwatermarked master. There is no bulk zip or CSV export. For large pulls (carrier requests, legal discovery), contact support.

How do I give a contractor temporary access?

Do not add them to your org directory. Open the assignment, go to the **Access** tab, and invite them by email or phone as a **collaborator** (can capture) or **observer** (view only). When the work is done, revoke the invitation from the same tab. Revocation is immediate. See Assignment-level invitations.

Can we rename "Teams" to "Crews"?

Yes. Go to **Settings → Terminology** and change the singular and plural forms of the team noun. The new names apply across the console and the mobile app. Eight nouns are rebrandable: business unit, team, assignment, and location, each singular and plural. See Terminology.

Who can see the audit log?

Anyone with the audit.read permission: org admins, business unit admins, and team admins. Members, collaborators, and observers cannot. See Audit log.

Our webhook endpoint is failing. How do I debug it?

1. Open **System → Webhooks** and look at the **Recent deliveries** card for the endpoint.
2. Check the **Response code** column: 2xx means your server accepted the delivery; 4xx/5xx means your server rejected or errored on it; no code with attempts climbing suggests a network or DNS problem.
3. Click a failing row to open the **Delivery detail drawer**, which shows the exact request and response. Your server logs should match what you see there.
4. Confirm your receiving code verifies the **X-CC-Signature** header correctly; signature mismatches are the most common cause of 4xx responses after an endpoint change.

See Webhooks.

Can field staff create assignments from the app?

Yes, if two conditions are met: the org's **Mobile app** setting is on (it is by default), and the person is an org, business unit, or team admin. Members and collaborators cannot create assignments from the app regardless of the setting. Mobile-created assignments appear on teammates' devices on next sync. See Organization settings.

What exactly happens when I delete an assignment, team, or organization?

- **Assignment (from the list)**: tombstoned, removed from every device on next sync, captured evidence retained in storage.
- **Assignment (from its detail page)**: the confirmation can include its captured media; read the prompt carefully, it cannot be undone.
- **Team**: its assignments, profiles, and members are removed.
- **Business unit**: it and all its teams are permanently deleted; the confirmation says so explicitly.
- **Organization**: hidden from the console, but data is retained and can be restored by support.

Details: Assignments, Structure and terminology.

Why does an assignment say "submitted" and then flip back to "active"?

The submitted status is automatic: the platform sets it when every media item on the assignment belongs to a submission, and clears it the moment new media arrives. A flip back to active means someone captured more media after the last submission. See Status filter chips.

Can I create a custom role?

No. The six roles are a fixed set enforced by the server. Pick the closest role, or use assignment-scoped collaborator and observer invitations to narrow someone's reach. See Roles and permissions.

Glossary

Plain-language definitions of the terms used across Contents Capture. Note that your organization may have renamed some nouns in **Terminology**, so "Team" below might read "Crew" in your console; the meaning is identical.

Structure

Organization Your whole company. The top of the hierarchy, holding business units, teams, users, and all their work.

Business unit A division inside an organization: a region, a line of business, or an event-level operation. Contains teams and can have its own admin.

Team A durable group of people who work losses together. Assignments, profiles, and capture-setting defaults all belong to a team.

Member A role for regular field staff: capture media and view media, within their teams.

Collaborator A role like member, but scoped to specific assignments by invitation. The standard way to bring in contractors.

Observer A view-only role, scoped to specific assignments by invitation. For carrier representatives and oversight.

Roles

Org admin The top role: everything in the console, including webhooks, integrations, and org-wide field activity on the Overview dashboard.

Business Unit admin Everything except webhooks and integrations. Typically runs a division.

Team admin Runs a team day to day: members, profiles, assignments, access grants, and audit access.

Work

Assignment A unit of work, usually one loss. Created inside a team from a published capture profile, with capture settings snapshotted at creation.

Capture profile The form/schema attached to assignments: the entities and fields adjusters fill in, for example "Loss Information" or "Item".

Entity A named collection of fields inside a profile, with a cardinality (single or many) and a scope.

Field One question or data point inside an entity. One of 15 types, from text to signature. See **Field types**.

Scope Where an entity's fields attach: the assignment as a whole, each location, each group, or each media item.

Published / draft / archived profile The profile lifecycle. Drafts are editable; published profiles are locked and usable for assignments; archived profiles are retired.

Snapshot A frozen copy taken at assignment creation. Assignments snapshot both the profile schema and the capture settings, so later changes never alter existing assignments.

Capture

Capture settings The evidence rules applied to every capture: timestamping, GPS metadata, proxy requirement, and watermark. See **Capture settings**.

Watermark A visible mark burned into review copies of captures: time, user, location, assignment, custom text, and a logo. The original master always stays clean.

Proxy A compressed copy of a capture used for fast review in the console. The original is always retained alongside it.

Submission A locked, immutable hand-off of media from the field. Creating one locks every included item read-only. See **Submissions and media**.

Sync state Where a media item is on the path from device to server: captured, processing, queued, uploading, synced, or failed.

Tag A word your organization agrees on, attached to an assignment, a room, or a media item, for the classifications the fixed fields do not cover. Matched without regard to capitalization, so "Roof" and "roof" are one tag. Workflows can read tags, trigger on them, and apply them. See **Tags**.

Tag registry The org-wide list of defined tags, with their colours, descriptions, and live usage counts. A tag anyone types is added automatically, so the list is the complete vocabulary in use rather than a curated subset.

Operations

Overview dashboard The landing screen and live operations view: a real-time feed, a field map with GPS trails, and productivity stats grouped by person or by job. Org-wide field activity is limited to org admins. Formerly a separate screen called Mission Control. See **Overview dashboard**.

Automation

Workflow An event-driven automation: when something happens, send messages, update statuses, or call webhooks. See Workflows.

Trigger The event that starts a workflow, for example `submission.created`.

Condition A branch in a workflow that runs steps only when checks pass, such as "status equals submitted".

Tag action A workflow step that puts a tag on something or takes one off. Because a workflow can also read tags, a tag is how an automation remembers that it has already acted.

Run One execution of a workflow. The runs feed shows every run with per-step detail and replay.

Template A reusable, versioned email or SMS message with `{{variable}}` placeholders, used by workflow send steps.

Webhook An outbound HTTP POST to your URL when events happen, signed so you can verify the sender. See Webhooks.

Signing secret The per-endpoint secret used to sign webhook deliveries. Shown once at creation; store it safely.

Integration token A read-only bearer token giving a partner app access to your org's assignments and media. See Integration tokens.

System

Audit log The record of every significant action in your org: actor, subject, source, IP, and detail, including denied actions. See Audit log.

Impersonation A support capability where platform staff act as a user to diagnose problems. Every impersonated action is recorded in the audit log.

Terminology The org-level renaming of the eight platform nouns (business unit, team, assignment, location; singular and plural) across the console and mobile app.

Assignment visibility The role-by-status matrix in Settings controlling which assignment statuses each role sees in the mobile app, enforced server-side.