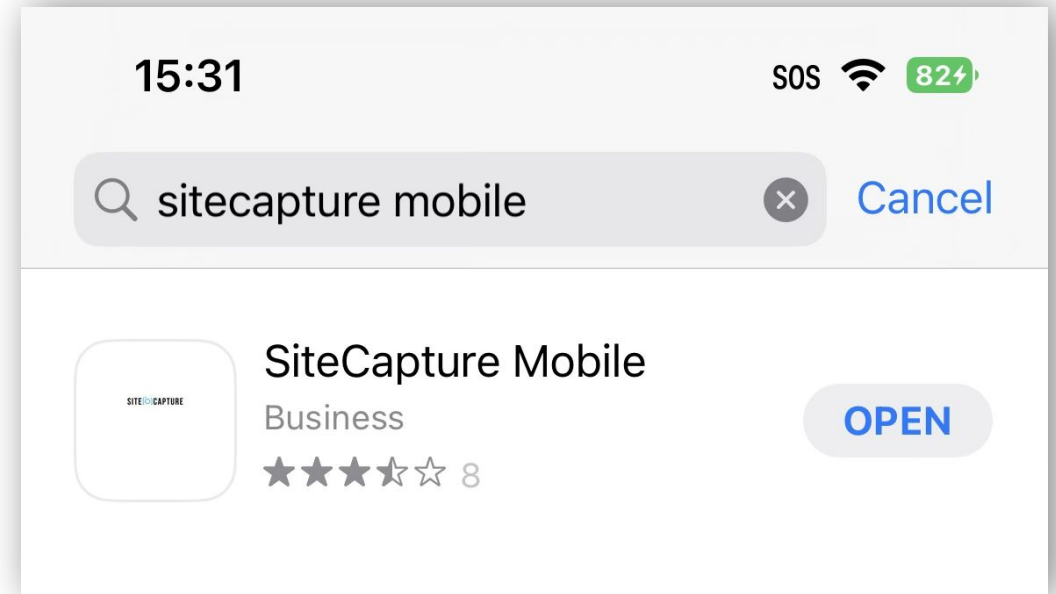# SITE[⊙]CAPTURE

Mobile App Training

Installing the SiteCapture App - iOS

Go to the App Store on your iOS device.

- Search "SiteCapture Mobile" or download directly from this link: apps.apple.com/us/app/sitecapture-mobile/id919666396

- Install SiteCapture.

Installing the SiteCapture App - Android 🤖

We support most Android devices running Android 4.2 and above.

- From your Android phone click the Play Store icon.

- Click on Apps and search for SiteCapture Mobile.

- Install SiteCapture.
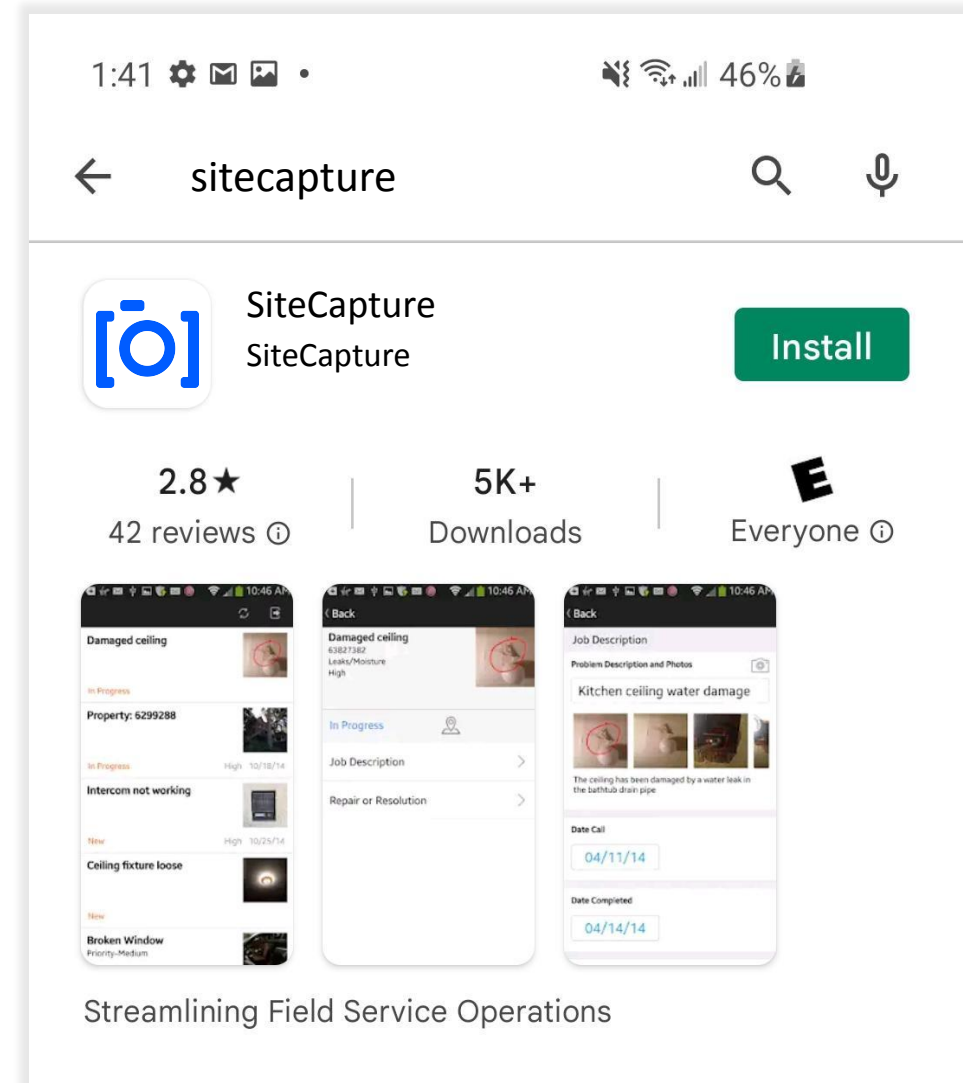
Logging In

Log in the first time when you are connected to WiFi. This will allow you to fully sync before you need to depend on cell data and possibly poor connectivity.

You never need to log out of SiteCapture unless you are switching accounts. If you do need to log out – be aware of the warning about making sure you are fully synced before you log out.

If you do not remember your password, click the blue "Forgot Password" link to reset your password.

List of Projects

When you first log in, and anytime you open your SiteCapture app, you will see a list of the projects you have permission to view

- If you have manager or portal admin user credentials, be aware that SiteCapture usually sets the limit of projects that can load on mobile to 150. If you have access to more than 150, only the first 150 will load on your device. You may want to discuss creating a mobile view with your SiteCapture admin.

- If there is a project you expect to see but cannot find, you can use the search for a project feature. It is documented here Search and Load a Project.
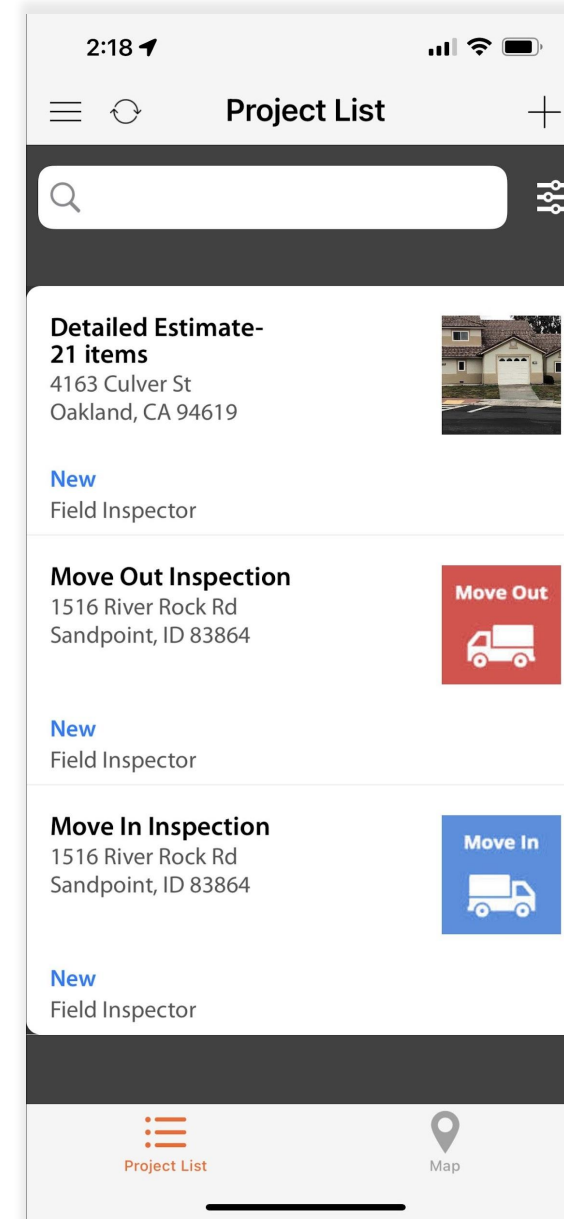
Filtering and Sorting your list

- To filter and/or sort work on mobile, press on the filter icon on the top right. (1)

- You can filter projects by Due Date, Status, Type, and Sort. Press on Due Date to filter by All Due Dates (including those without a due date), a due date of Today, a due date of This Week, or a due date with a specific Date Range. Make your selection and press Apply.
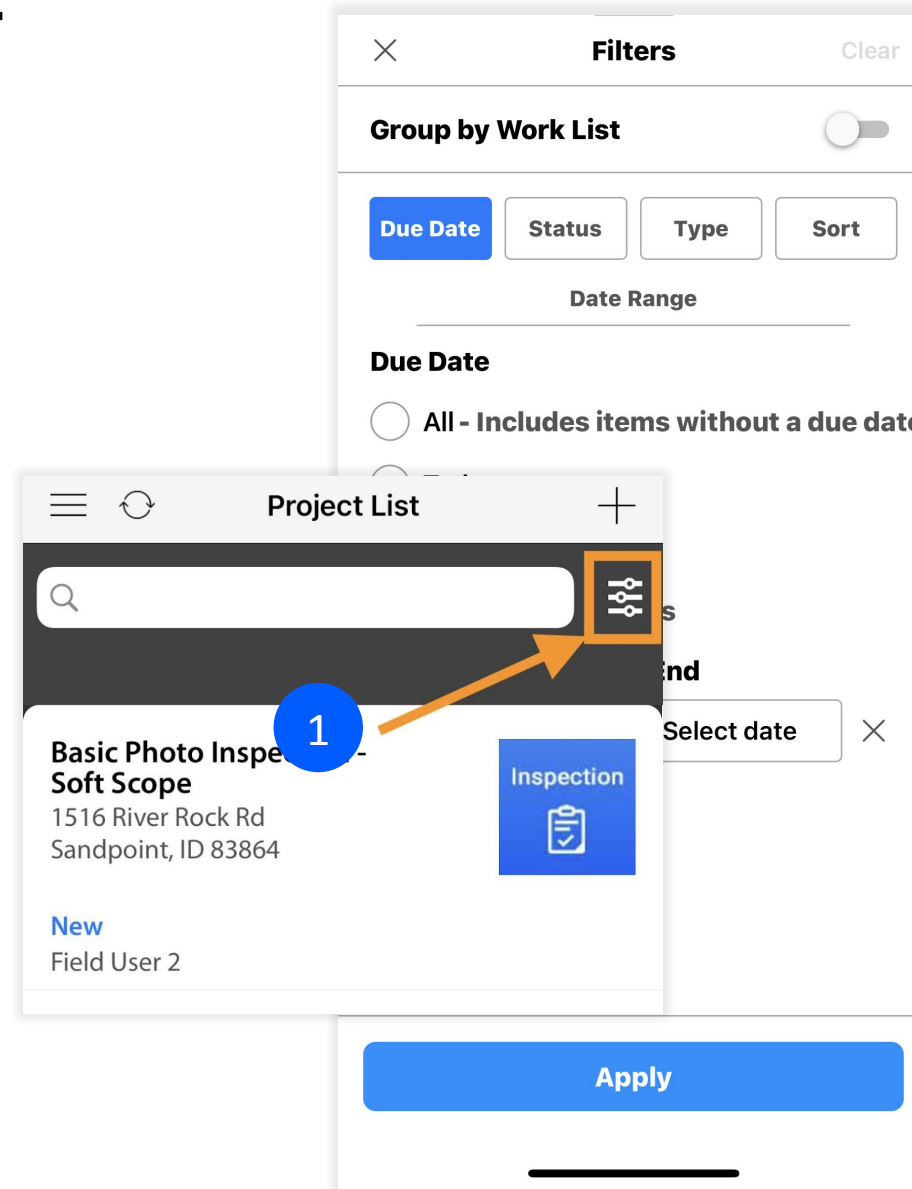
Filtering and Sorting your list

- Press on "Status" and you can filter by the project statuses. Press on the status and then press Apply.

- Press on "Type" and you can filter by the types. Press on Apply after selecting the type.

- Press on "Sort" and you have the options to sort by Name, Oldest First, Newest First, Due Date, Priority, Status, and Distance if you are geocoding the projects. Press on "Apply" after making your selection.

Filtering and Sorting Your List

After pressing "Apply" the filters selected will appear under the search bar and the filter icon will be blue.

- You can adjust the filter by pressing the button at the top, making a different selection (date range, type, etc.), and clicking "apply".

- If you want to start a new filter, tap on "Clear" to reset everything.
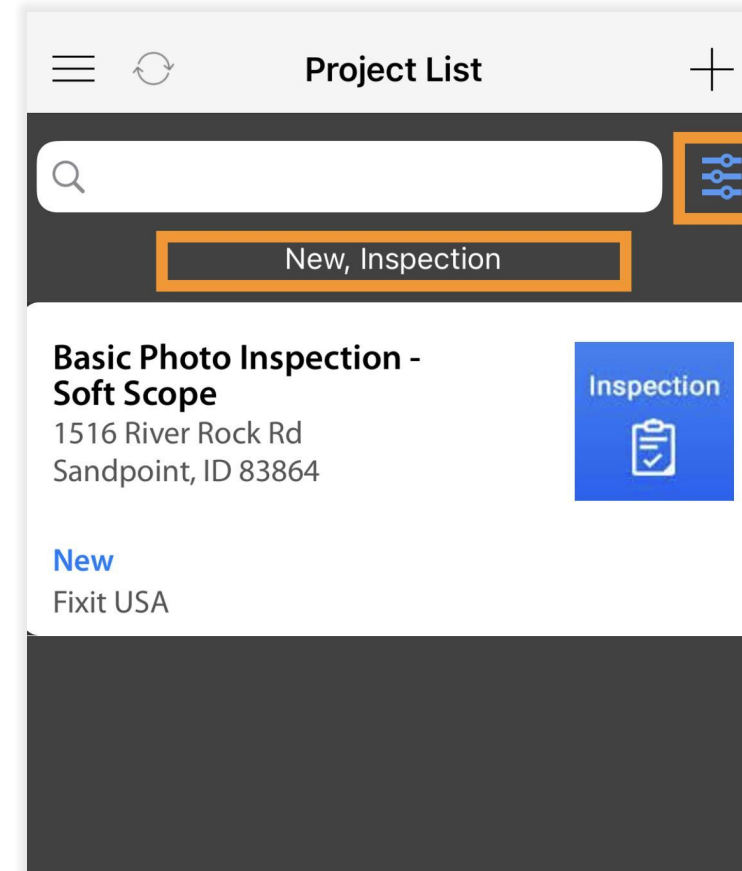
Opening a Project From a Link

- If you were provided a project URL from your administrator, or you have received an email notification with a link, you can click on that link from your mobile device to open the project in the SiteCapture mobile app.

- From your mobile device, open the Email app and click "Open in Mobile App" (1).

- The project will open in the app. If it's not loaded yet you will see a prompt to download the project. Select "Yes" and the project will download.

- When the project is finished downloading it will open.

Inspection

Dear Field User 2,

Please click one of the links below to open this project in SiteCapture. If you have any questions or need further instruction please contact the company who has assigned this work to you.

Basic Photo Inspection - Soft Scope
1516 River Rock Rd
Standpoint, ID 83864
$0.00

Inspection: https://app.sitecapture.com/app/
#/project/show/5029504

1 On your mobile device? Open in Mobile App

Starting to Work

- Once you have your work open (either from clicking through a link or pressing on the project from the list view) you should see something similar to the image here.

- Your company should give you instructions on what to do with the status, but often they will want you to click where you see "new" and set a different status like "in progress" when you start working (1).

- The next set of slides will cover things such as required fields which are indicated by the orange numbers. To begin working you simply press into a section.

- If you want to go to another project, click "back" and you will be back on the full project list view.
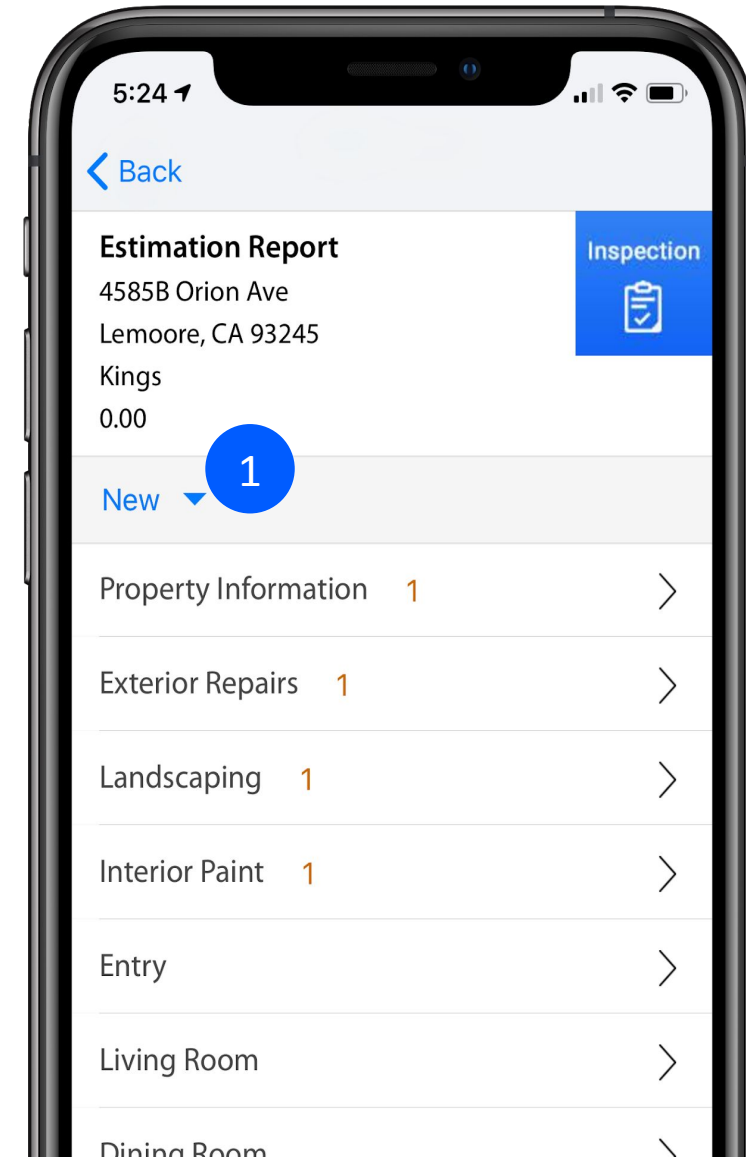
Required Fields

- If a project has required fields/questions you will see a number count in orange text next to the section names when you open the project (1). This number is how many required questions and/or photos you will need to fill out in each section.

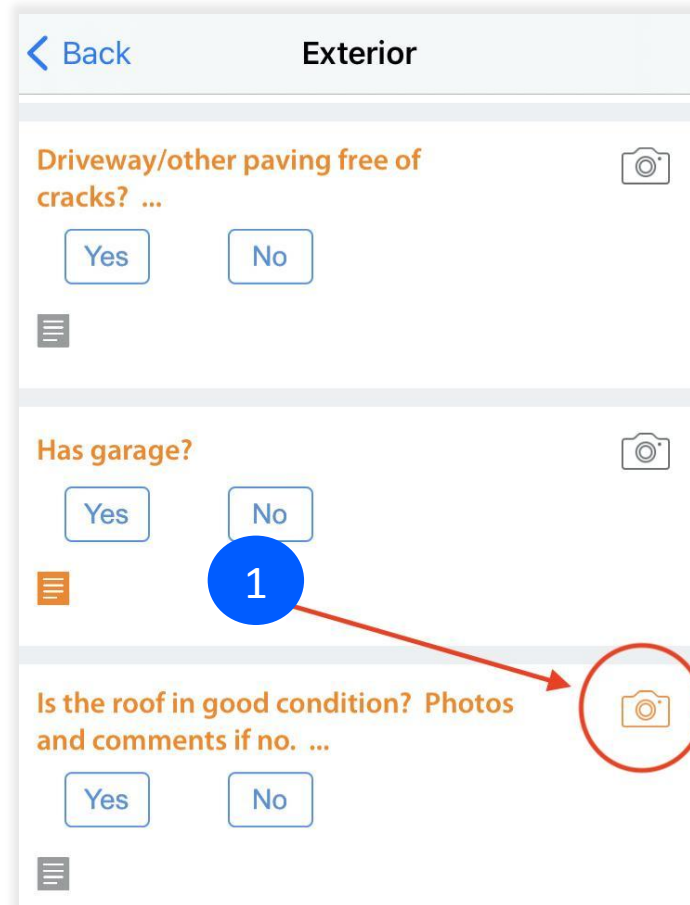- If a field/question is required, the text displays orange (2). Once you fill it out the text will display black.

Required Fields

A required photo will have an orange camera icon and you will need to provide at least one photo to meet the requirement. If a field/question is required, the text displays orange. Once you fill it out the text will display black (1).

If a comment is required, a comment icon will display in orange (2).

You must complete all required fields, photos and/or comments before you can change the status to "Complete" and submit your completed work.
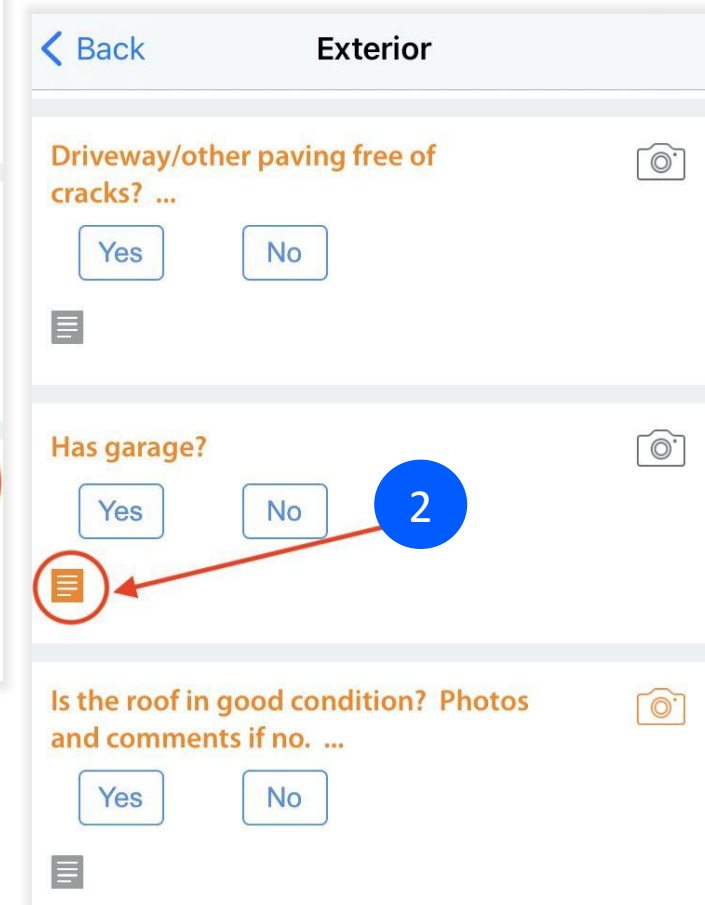
Taking Photos on iOS

- Scroll to a field that has a camera icon and click the icon. The camera icon indicates that photos are allowed in that field. An orange camera icon indicates photos are required.

- A prompt may appear saying "SiteCapture would like to Access the Camera". You must press OK – camera access is required if you want to take and add images to your job.

- The camera will open. You can focus using the touch screen. To turn on the flash, click on the flash icon in the top left corner. When you are ready to take your photo click on the white circle. When you are done taking photos click on Done in the bottom left corner.

Taking Photos on IOS

- To add a caption to your photo, go back to the photo and click on it to open it. Click "Add Caption", type your caption, and click done (1).

- To save a photo to your iOS device, click on the download icon below the photo (2).

Taking Photos on iOS

- A prompt will appear to allow SiteCapture to add photos to your iOS mobile photo library. You must select "OK" if you want to save photos from the SiteCapture app to your mobile device (1).

- After selecting OK, a blue box will appear above the photo indicating it has been saved to your photo library.

- To delete a photo, press and hold down on the photo until the delete icon (trashcan) appears. Press the trashcan to delete the photo. This will permanently delete the photo (2).

"SiteCapture" Would Like to Add to your Photos
Photo library access is required if you want to save images.

Don't Allow   OK

●●○○○ Verizon   1:28 PM   77% ■

‹ Back

4 Corners of Property (include outbuildings)

Press and hold down on the photo until the delete icon appears. Press the trashcan to delete the photo.

2

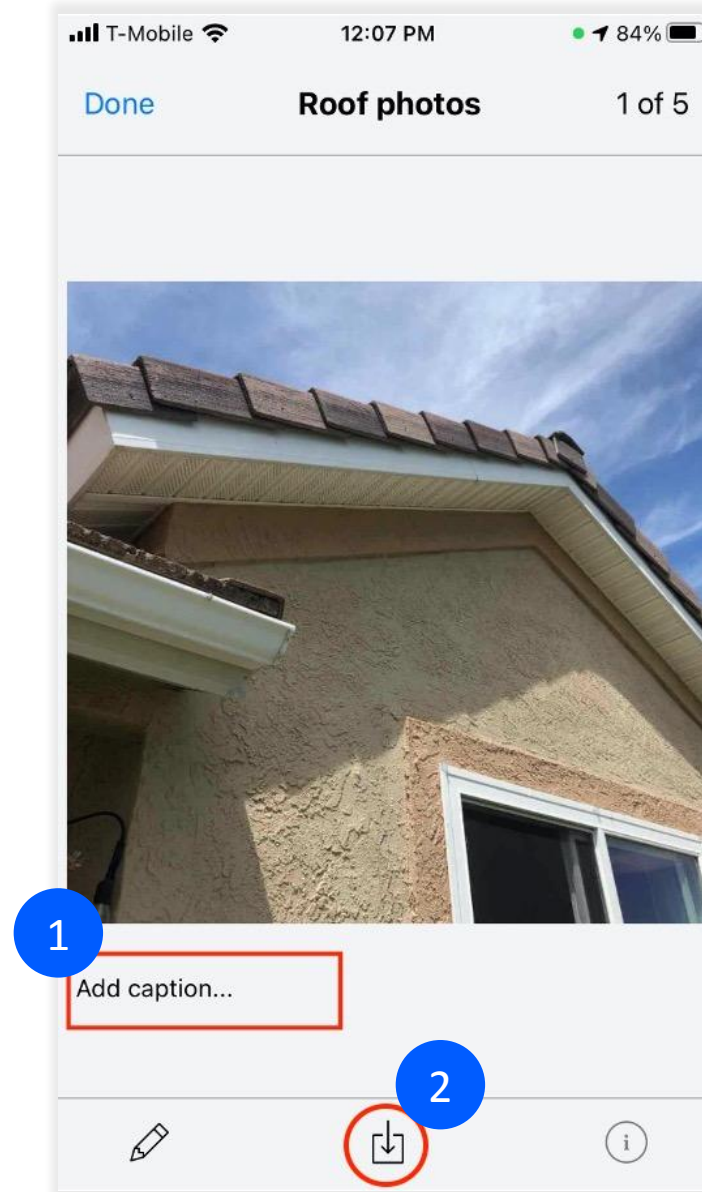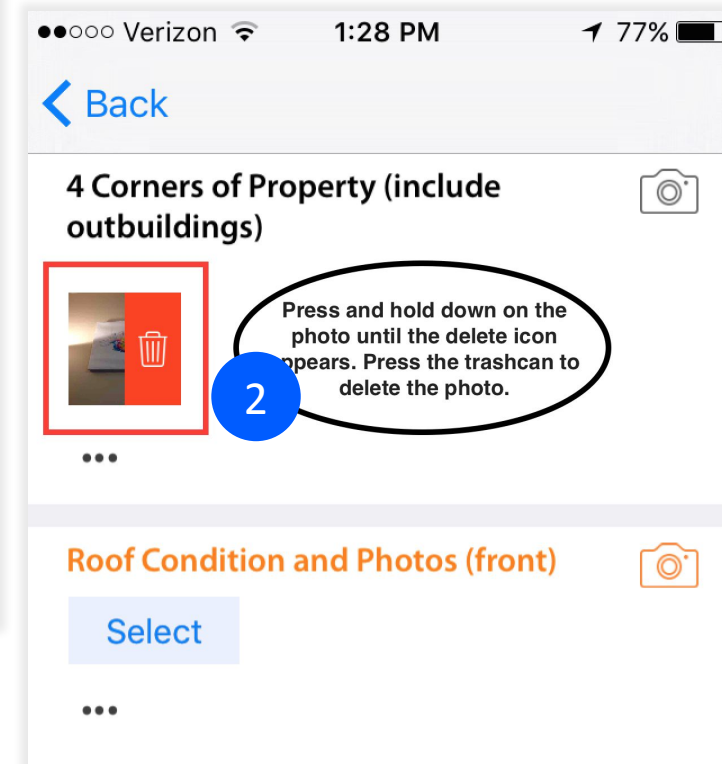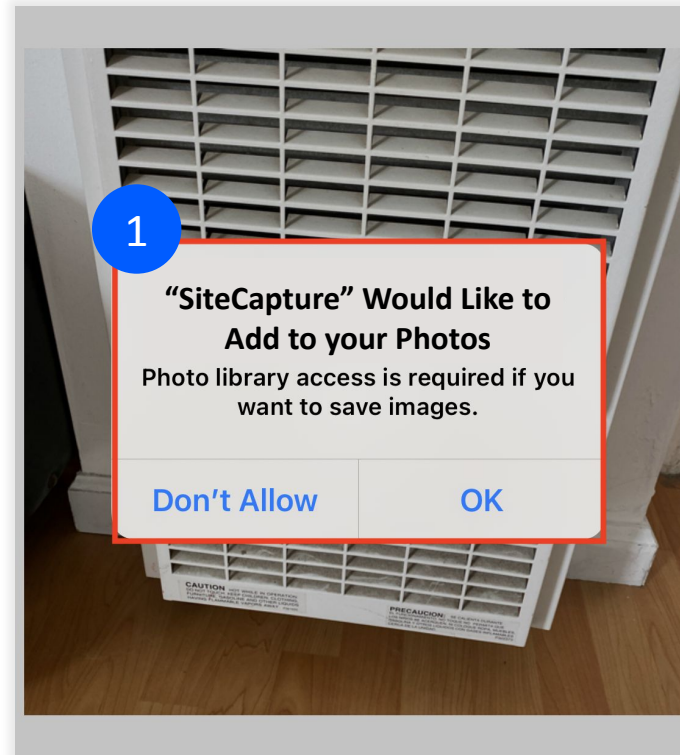**Roof Condition and Photos (front)**

Select

Taking Photos on Android

- Scroll to a field that has a camera icon and click the icon (1). The camera icon indicates that photos are allowed in that field. An orange camera icon indicate photos are required.

- The camera will open. Tap on the white circle to take a photo (2). You can also take photos by using the volume up button.

- To add a Flash, tap on the flash icon on the top left (3).

- Tap "Done" on the lower left to exit the camera (4).
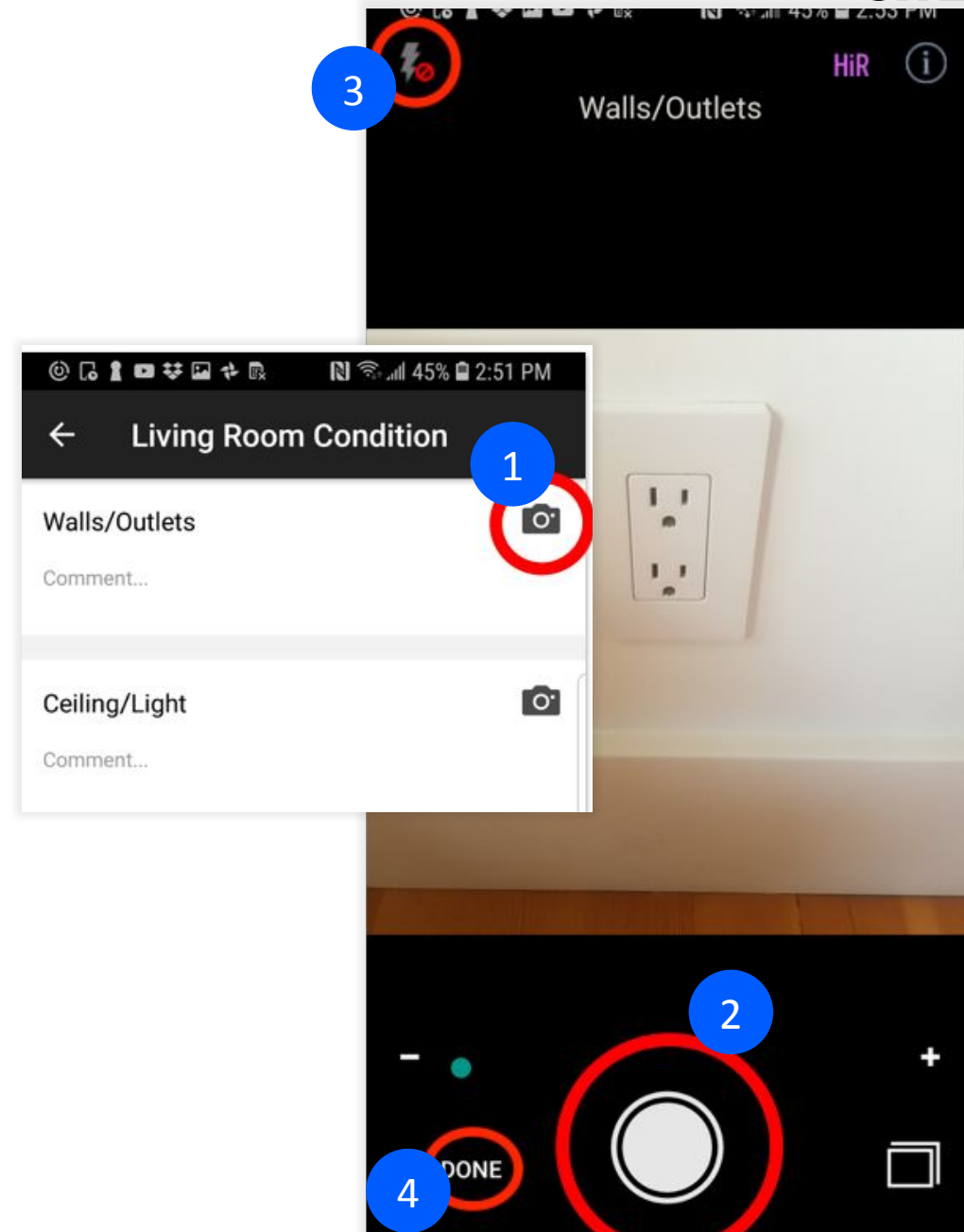
Taking Photos on Android

- To add a photo caption, tap the photo.

- Tap to start typing and enter a caption (1).

- To delete a photo, press and hold on the photo you want to delete. An x icon will appear. Click on the "x" and the photo will be deleted (2). This will permanently delete the photo.
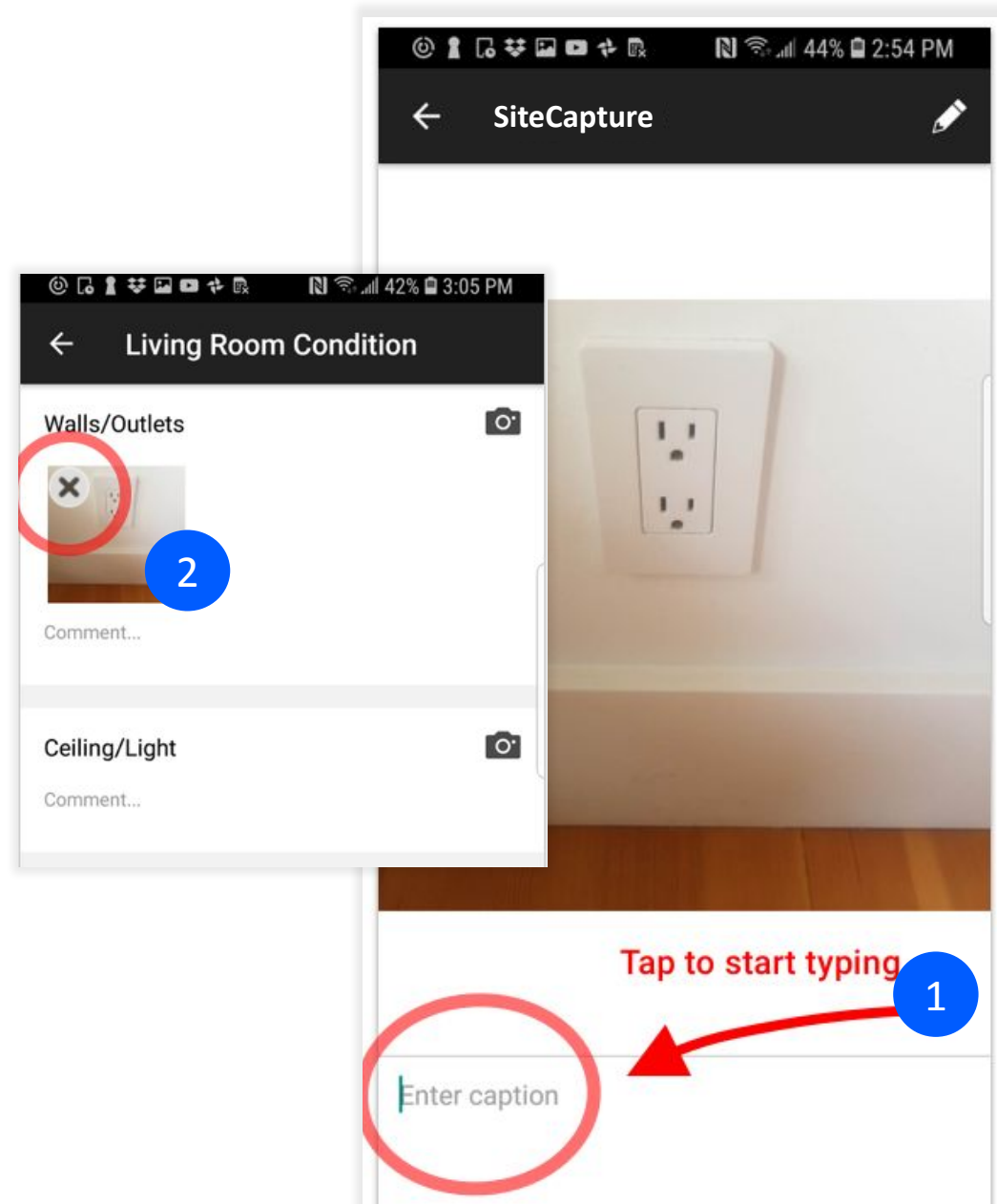
Adding Line Items

- SiteCapture has a feature called "Dynamic Field Groups" which is often used in conjunction with estimating, but it can be used in a variety of ways to create items.

- If your project has dynamic field groups, you will see a button with blue text that says something like " Add New Repairs" or "Add New Items".

- If you see that button at the bottom of the set of fields in any section, you have the ability to add "items" which is like adding rows to a table, or you can think of it as a mini-form within the project.

- Press the button to add a new item and complete the fields. When you are done, click "Back" at the top left of the screen.
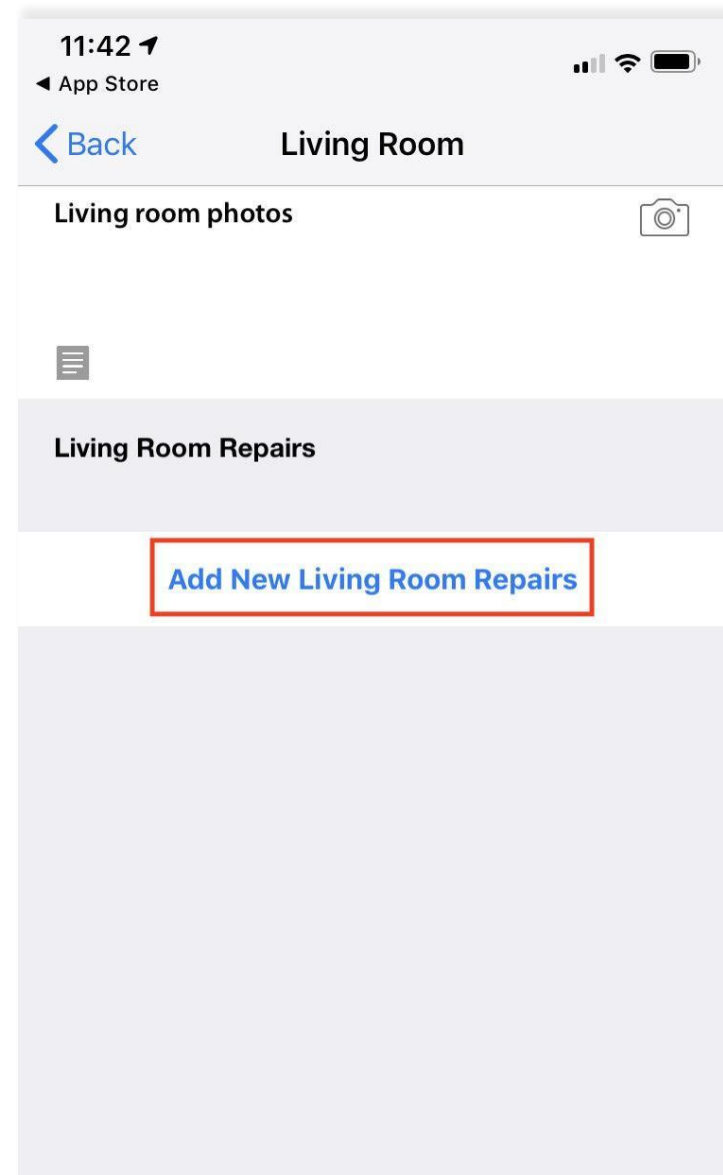
Adding Items with Estimates

- If your instance of SiteCapture has been set up for bidding, estimating or other cost calculating with pre-priced items in a service line database, when you click "add items" you will immediately be prompted to select at least one item (1). You can select multiple items too.

- You can also search for an item in the search box. Press Done after choosing the appropriate service(s) and the new item(s) will be created.

- You may or may not see a cost field (work estimate). If you see a cost field but the calculation does not appear to have happened, or if you change the quantity, you can click the two grey arrows on the right (2).

- Click on the section name on the upper left to go back to the previous view.
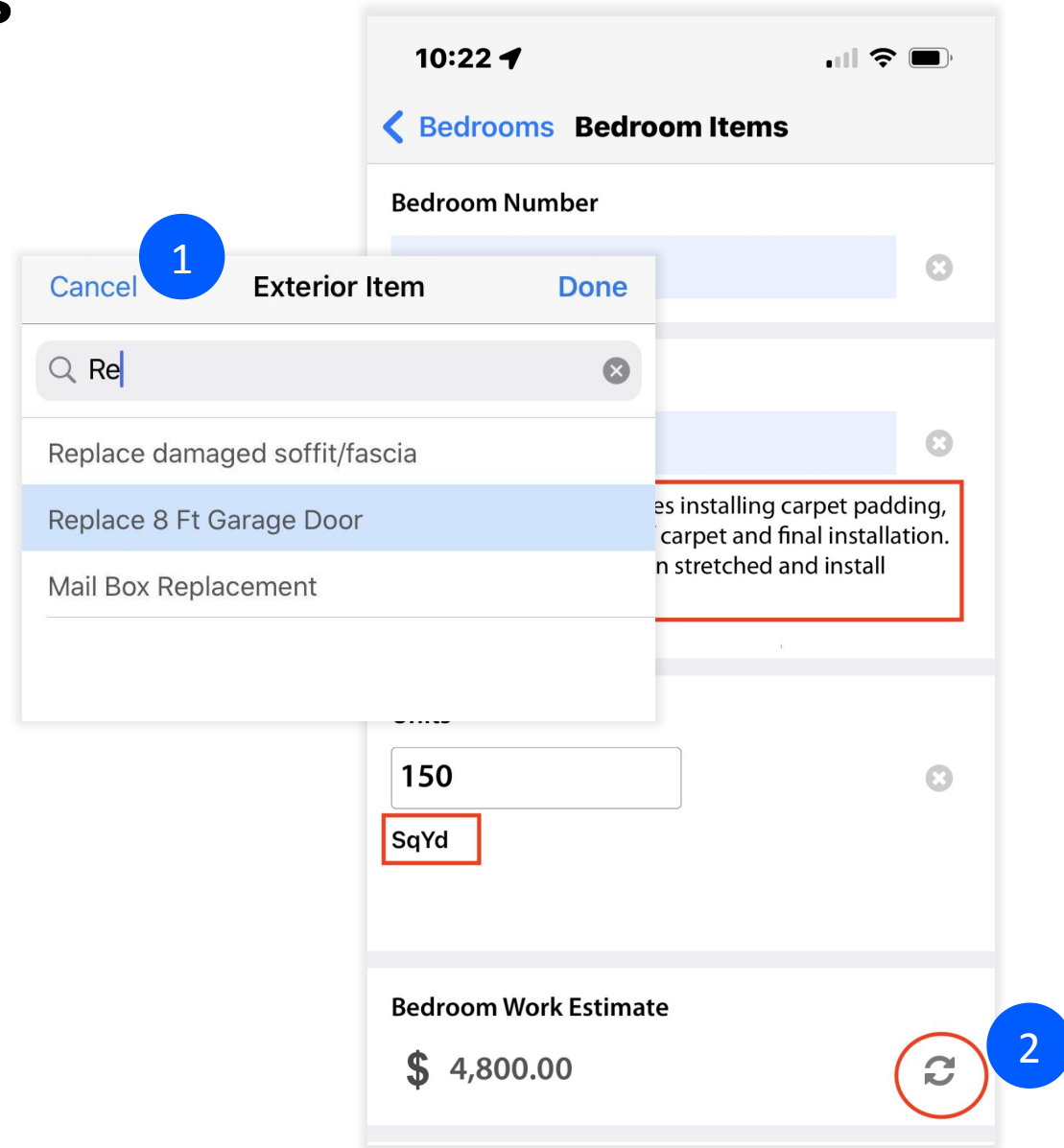
Adding Items with Estimates

- The item(s) you added will show up in a list below their title beneath the other fields in the section when you go back to the previous view.

- When adding items, there may be required fields including photo fields. Make sure you fulfill all the requirements. The item will have orange coloring to show if you missed a requirement (1).

- From this view, you can delete an item if needed.

Note: Some fields can also be "locked" or "read-only". This is determined by the company who has created this work and assigned it to you
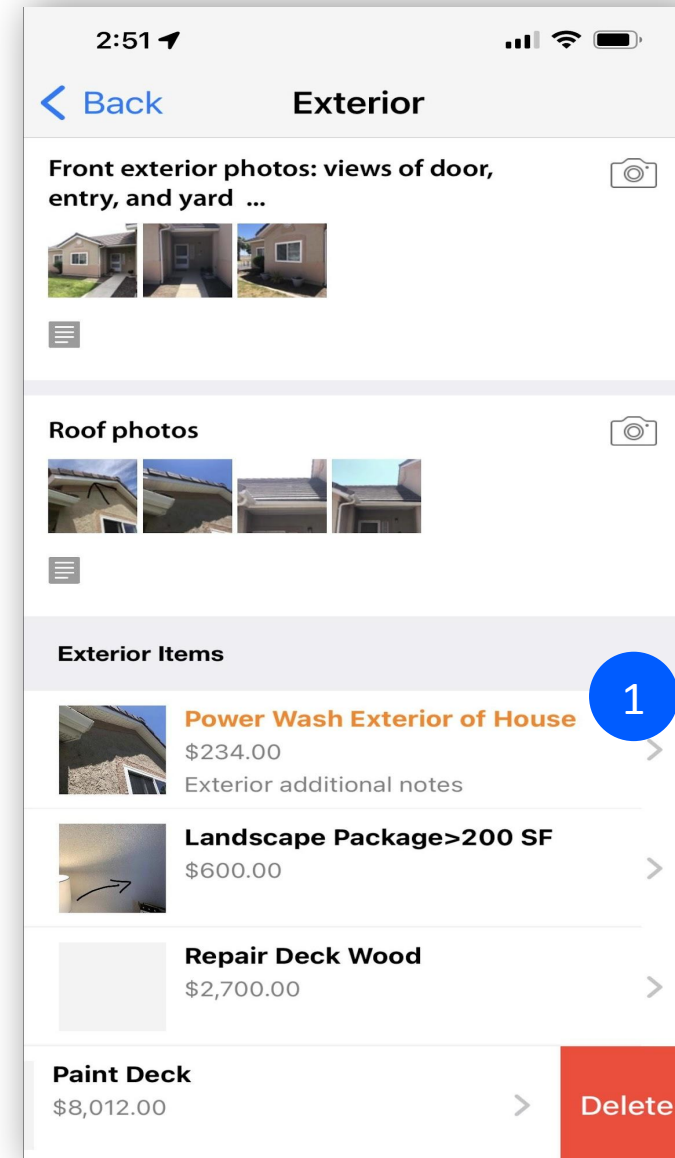
Deleting Items

- If you want to delete a dynamic item on iOS, swipe to the left until the red delete button appears. Click "Delete" (1).

- If you want to delete a dynamic item on Android, swipe to the left on the item and a pop-up box will appear. Press "OK" to delete or "Cancel" if you no longer want to delete the item (2).
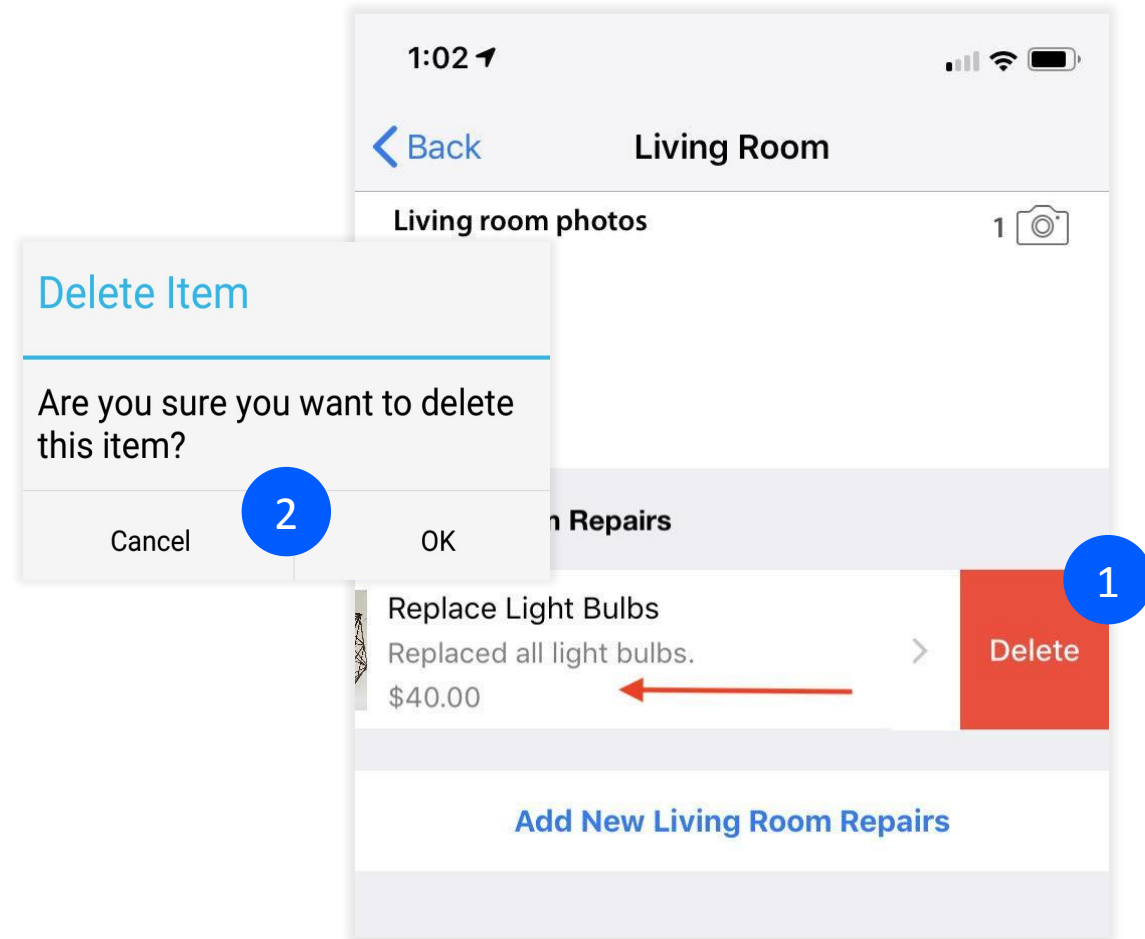
Changing a Status

- Your company will provide you with details about which statuses to select and when to set them.

- To change or set a status, click on the existing status (1), select the one you want to set and click "Done" (2).

- Click "Back" to start syncing. Note-You can only select a status of Complete when all required fields are complete.

- The GPS and date/time will be captured on all status changes.

Note: If all requirements are not met and the status is set for complete, you will get a warning that you cannot set that status until you go back and fulfill all the requirements.
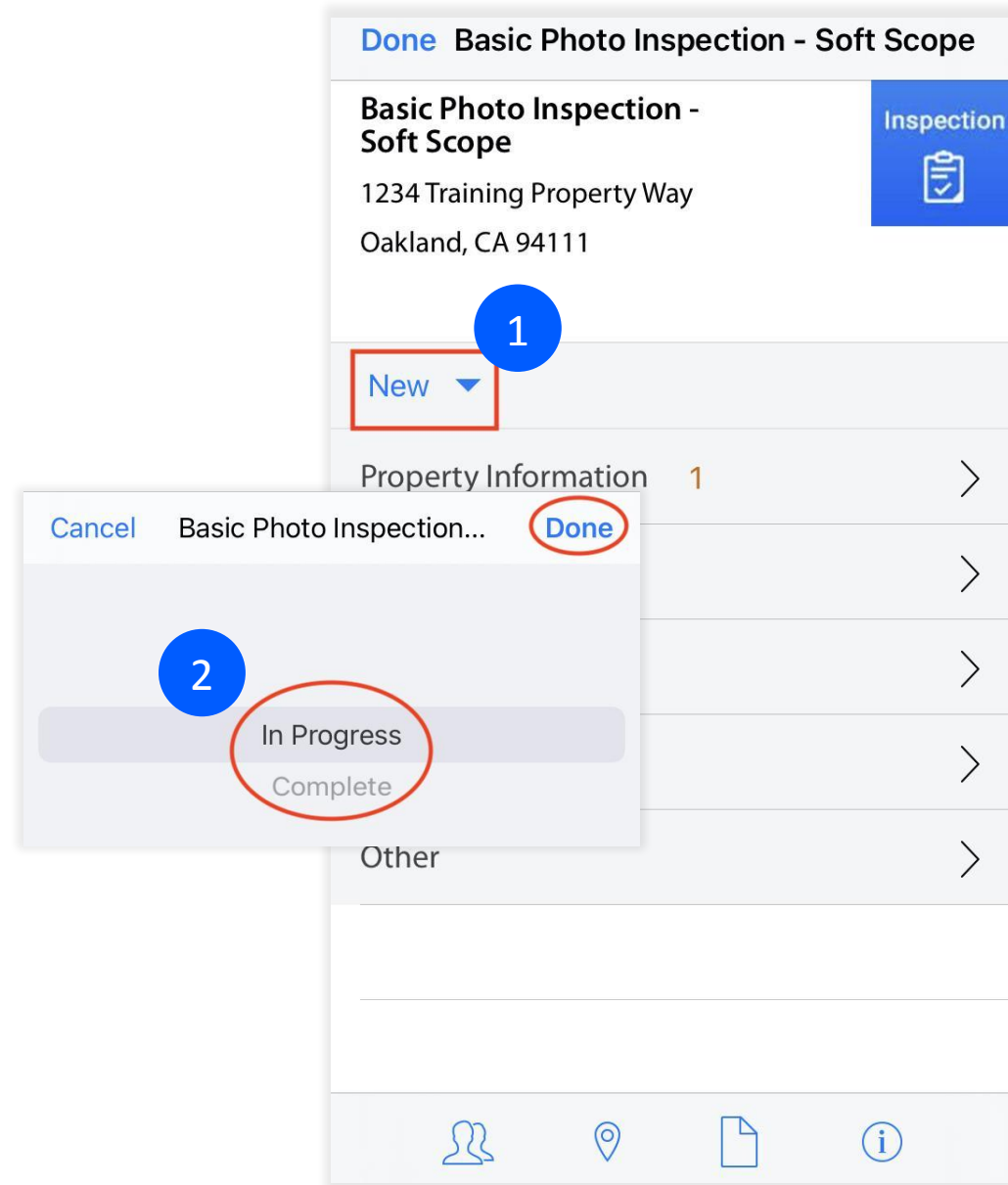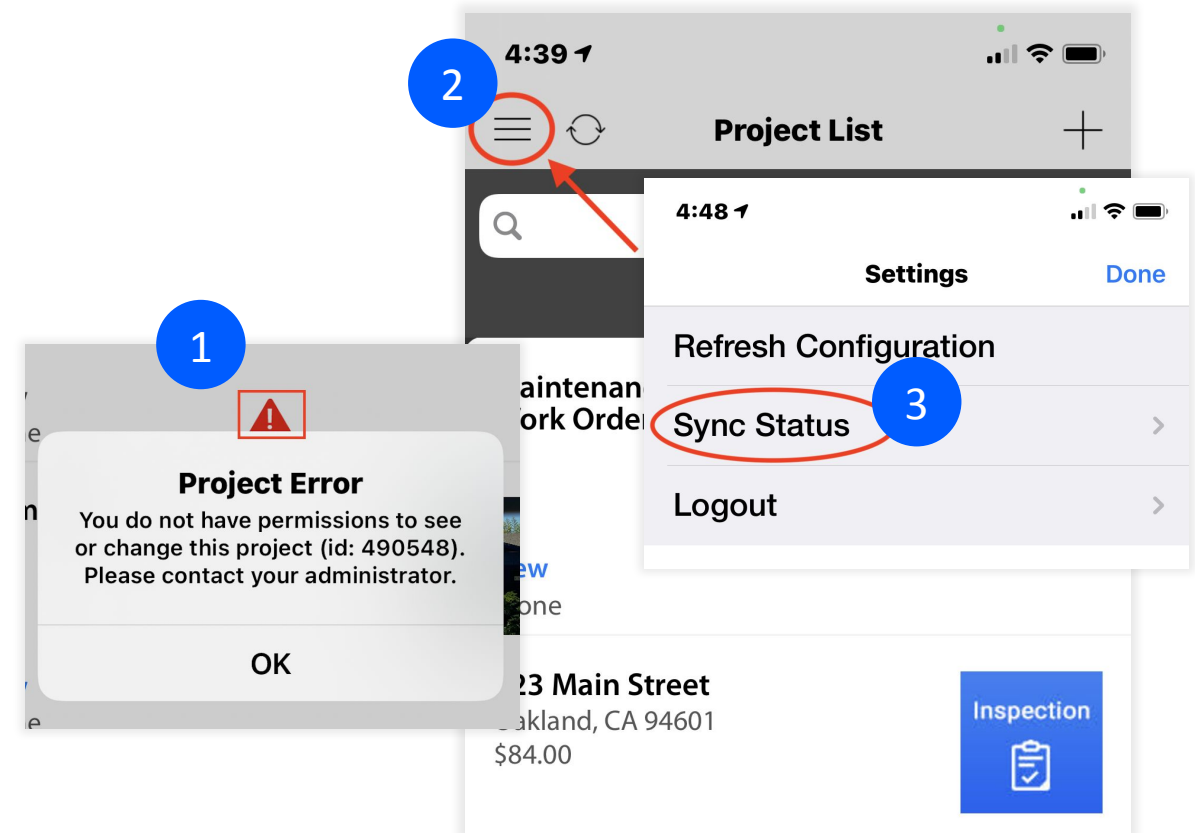
Completing & Syncing Work

- As you are completing your work on mobile, it will sync to the cloud whenever you have data or a Wi-Fi connection and you return to the work list view.

- When the Sync icon in the top left is spinning, your work is syncing. You can initiate a sync by tapping the sync button or pulling down on the list (1).

- A sync icon will also appear on the project to inform you of the status.

NOTE: Many companies have SiteCapture configured so that the project will leave your list view once it is fully synced. Don't panic, you will still see it from the Web App. If it sits greyed out it is in the process of syncing, and you cannot access it from mobile at that moment.


SITE[ō]CAPTURE
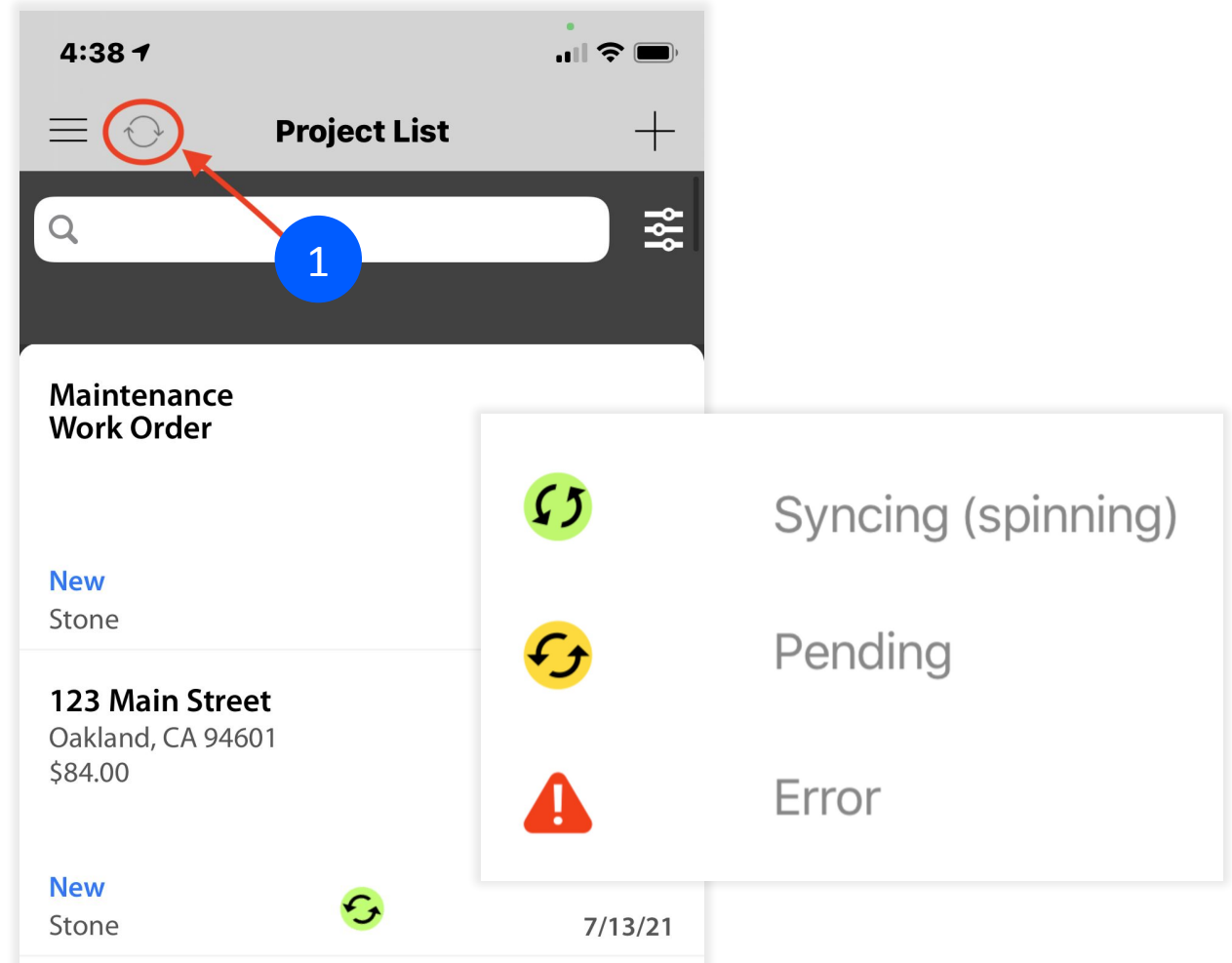
How to Sync on iOS

- If you see a red icon (1), on the project press the icon and you will see what the issue is. Usually, this error is related to the project being re-assigned to a different user. You will need to contact the company who assigned the work to you to have them assign the project back to you to finish syncing.

- You can check your Sync Status by going to the Settings Menu (2) at the top left and tapping on Sync Status (3).
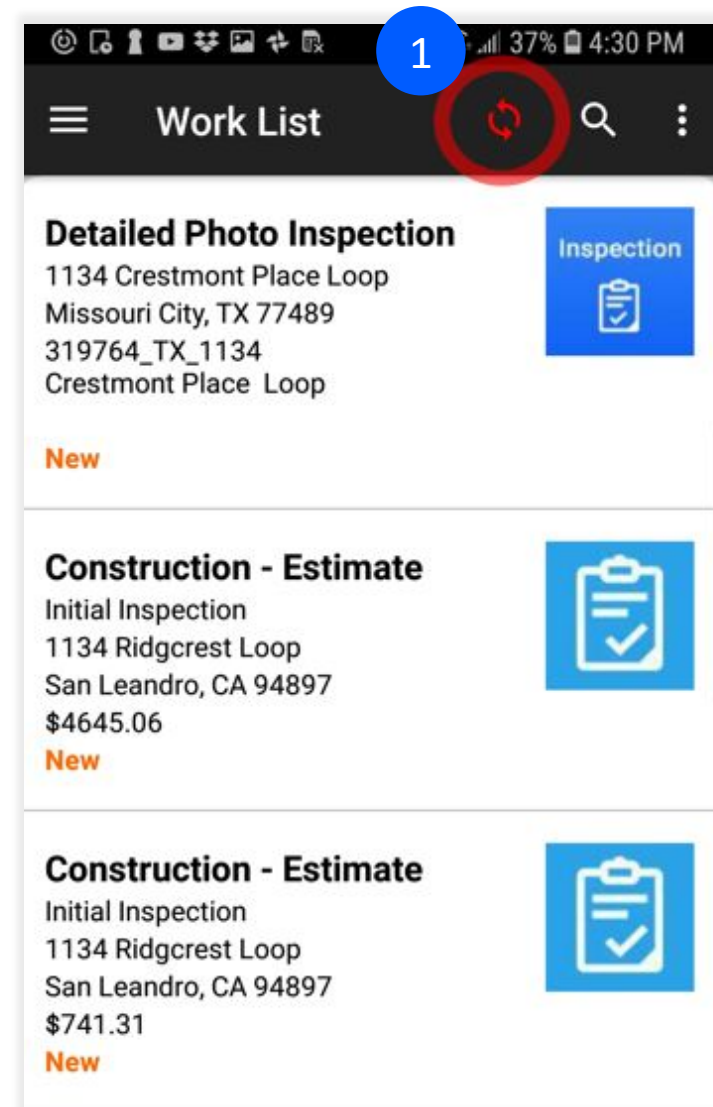
How to Sync on iOS

- The sync status gives you information about what type of connection you have (wifi/4G/etc.), how many projects, and the number of media and fields that need to be synced.

- When syncing is complete you will see Projects, Media, and Fields at 0. If you need to start syncing, you can click on the "Start syncing now" link to initiate a sync.

- Tapping on "Issues Syncing" will take you to this syncing guide. If your sync seems like it is stuck, please try to quit and restart your app.
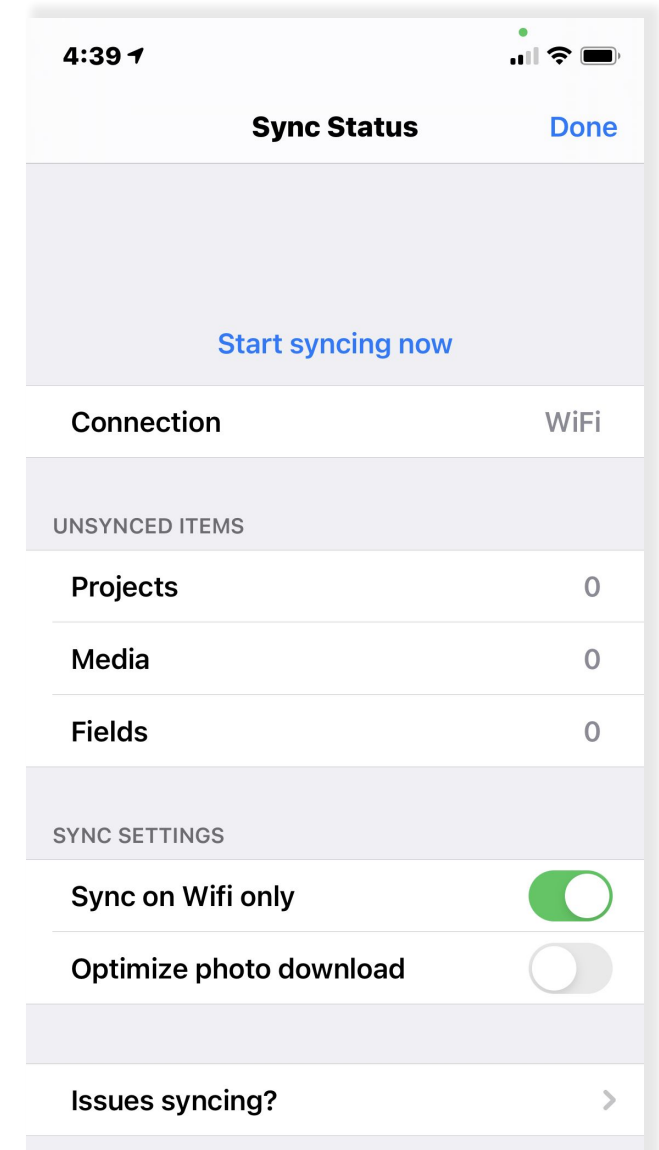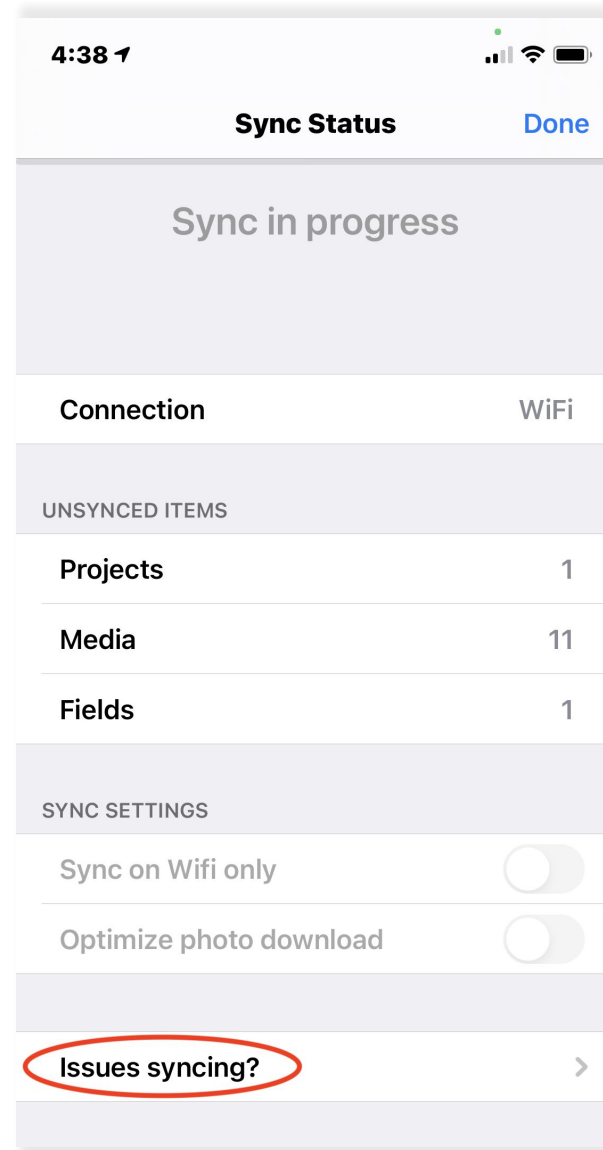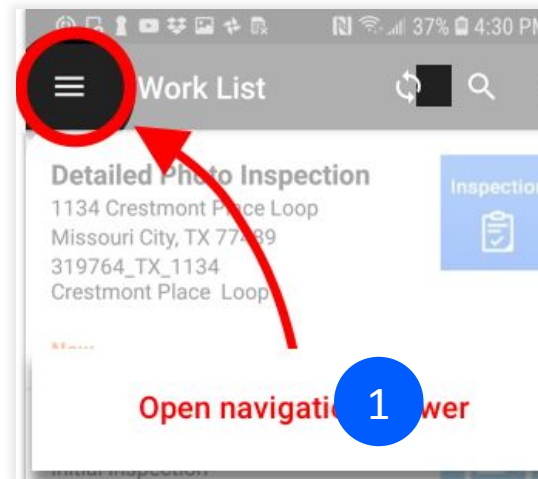
How to Sync on Android

- As you are completing your work on mobile, it will sync to the cloud whenever you have data or a wifi connection.

- When the Sync icon in the top right is spinning, your work is syncing (1). You can initiate a sync by tapping the sync button or pulling down on the list.

- If the sync button is RED, press it and it will start to sync (spin) if there is an internet connection. WARNING: Do NOT log out when the sync icon is red. You WILL lose data and photos that have not been synced.

How to Sync on Android

- To check the Sync Status, open the navigation drawer by tapping the menu button (1).

- Tap on Sync Status (2).

- The sync status gives you information regarding your connection (online/offline), how many projects, and the number of photos that need to be synced.

How to Sync on Android
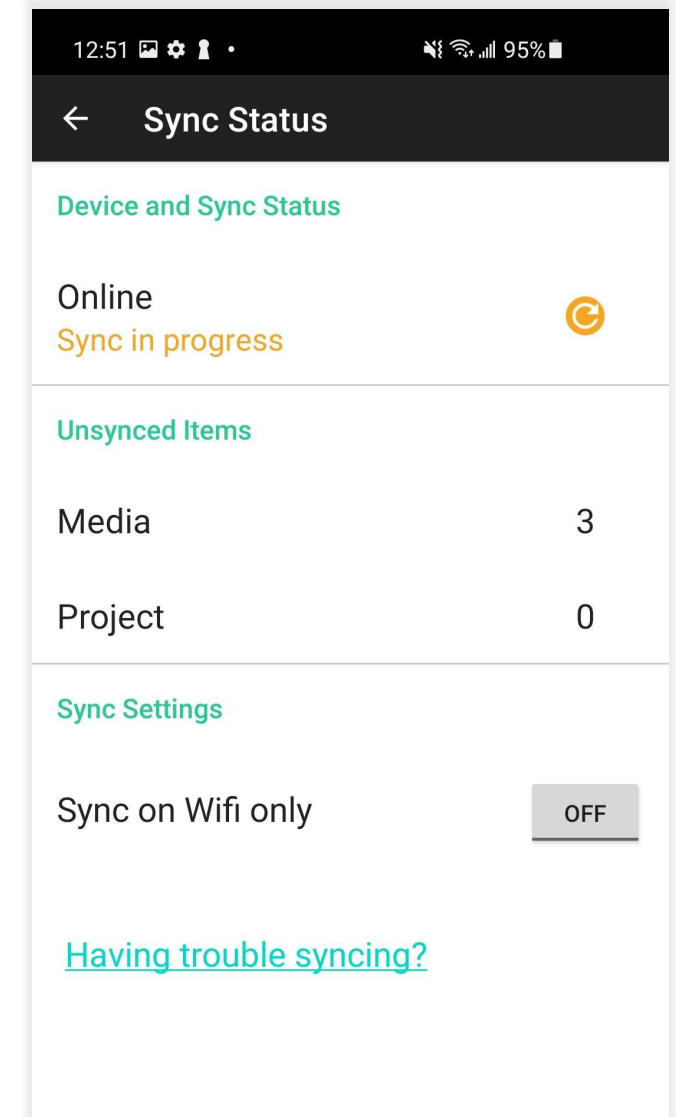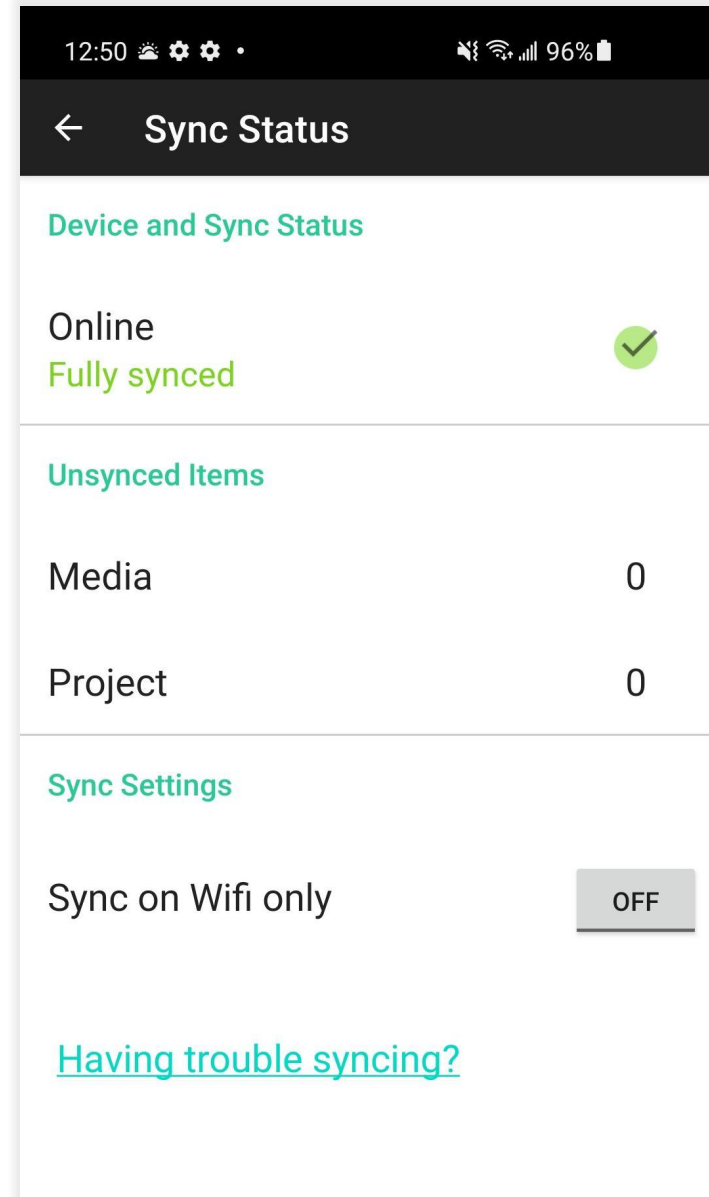
- When syncing is complete you will see the message that your device is fully synced, and the number of photos and projects will be 0.

- Tapping on "Having trouble syncing?" will take you to this syncing guide. If your sync seems like it is stuck, please try to quit and restart your app.

Syncing Tips

Please do **NOT** Log Out, uninstall the app, or restart your device unless you are sure you are **FULLY** synced as this may cause data/photo loss and this data or media will not be recoverable.

If your phone goes to sleep or your app goes into the background when you open another app, the sync can be paused. We recommend you keep the app open and make sure your phone doesn't go to sleep until after the syncing is complete.

If you have a lot of photos to sync it can take a while and it will depend on the speed of your connection. If this doesn't resolve the issue, please send us a sync report (iOS users). Also, check with your administrator to make sure the work was not re-assigned.

We recommend syncing over a Wi-Fi connection when you can.

Email support@sitecapture.com if you are having issues and please provide us with as much detail as possible regarding your issue.

Additional Support

Visit our support site for additional support articles and videos:
https://sitecapture.zendesk.com

For technical support, email support@sitecapture.com