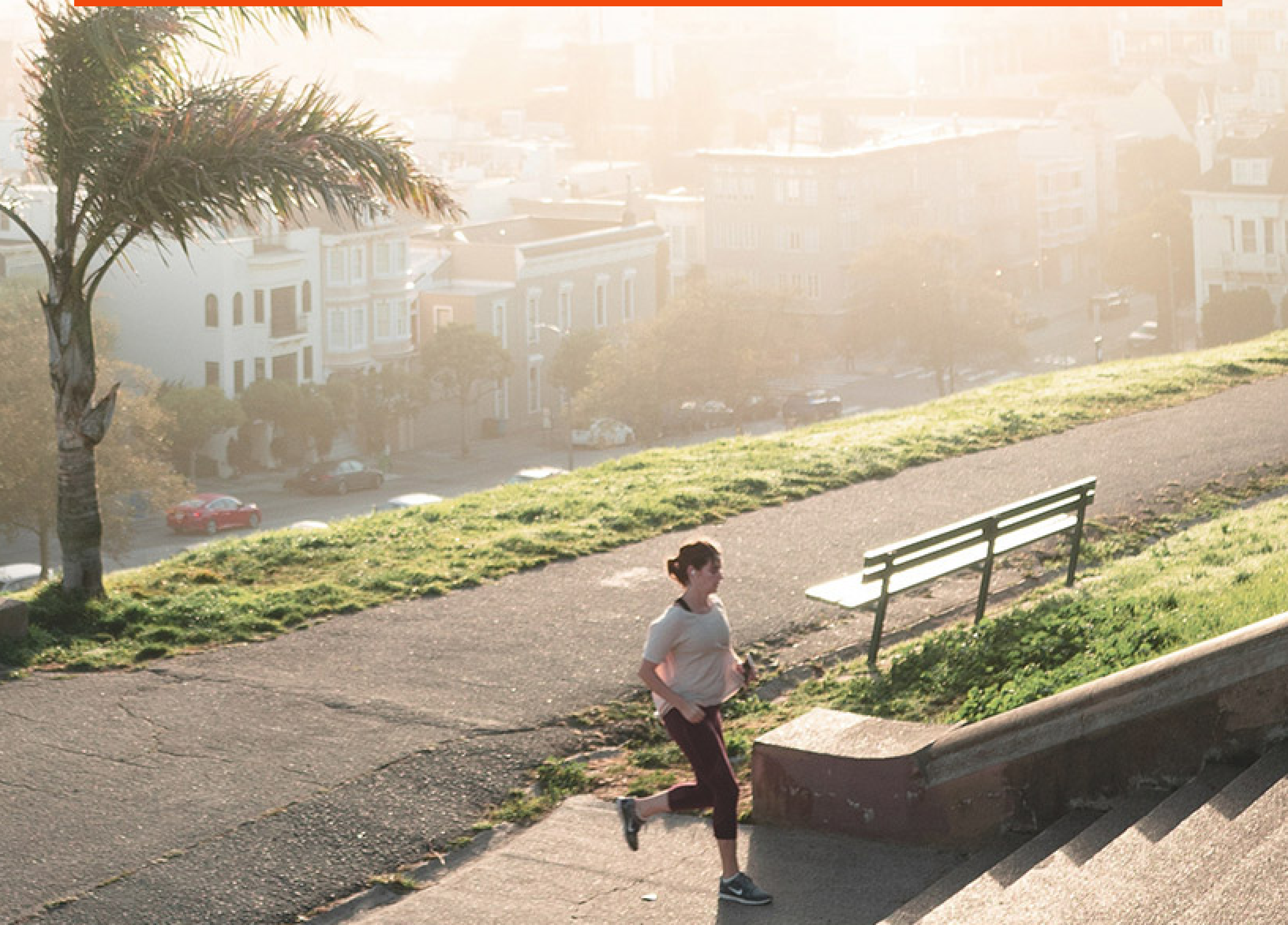
CENTRALSQUARE®

CentralSquare Mobiles

User Guide 2.0.11



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CentralSquare Mobiles overview

The CentralSquare Mobiles application offers inspectors and code compliance officers the tools they need to efficiently work in the field.

Inspectors have quick access to inspection details and functions. Inspectors can view existing inspections, add inspections, edit inspections, reassign inspections, and result inspections.

Code enforcement officers have quick access to code case details and functions. Officers can view existing cases, add cases, result cases, and perform other actions.

CentralSquare Mobiles is available for both iOS and Android devices.

Getting started

Before you can begin working in CentralSquare Mobiles, you must be set up as a user in Community Development. If you are not already set up with a Community Development user name and password, contact your Administrator.

You can use CentralSquare Mobiles on an iOS or Android device. To set up your mobile device, complete the following steps:

1. Download the CentralSquare Mobiles application from your app store or play store.

   CentralSquare Mobile on the App Store

   CentralSquare Mobile - Apps on Google Play

2. Open the application.
3. On the login page, select **SERVER SETTINGS**.
4. Enter your Community Development server URL, in this format: https://*path.to.your.server.url/entrypoint*

   Example: https://prod.youragency.com/cstmobiles

5. Select **SAVE**.

Server settings

Your Community Development server URL is required to run CentralSquare Mobiles.

To access these settings, use one of the following methods:

- On the login page, select **SERVER SETTINGS**. Use this method to set up the app for first use or if you cannot log in.
- After you log in, select **Profile**. Then, select **Application Server and Token Key**.

When you access server settings, you can verify or enter your server URL. If you make changes, select **SAVE**.

Technical configuration

To run CentralSquare Mobiles, you need services (DLLs, or dynamic link library files) on your public server. The server can be the same server you use for eTRAKiT. Services are installed with the installer. Services include:

- Mobiles API.
- Service processor.
- Queue manager: Stores updates that are pending upload from Mobiles to Community Development. The queue manager database is set up automatically during installation.
- Community Development REST services.

To test services, open your web browser. In the address bar, enter your mobile services URL followed by **/values**. For example: https://mobiles.mycity.com/mobiles/api/values. If the web page says **["value1","value2"]**, services are set up correctly.

Setting up maps

CentralSquare Mobiles uses Google's JavaScript API for rendering the map and getting directions.

For maps and routing to work properly, each agency must provide its own Google API key. This API key must be provided to the installation team, who will configure the CentralSquare Mobiles API so that any person using that environment can view maps.

CentralSquare Mobiles uses Google's Directions API and Maps JavaScript API.

To generate and set up a Google API key for use with CentralSquare Mobiles:

1. Go to Google's Console: https://console.cloud.google.com/welcome?.
2. If you already have an account, log in. Otherwise, create an account.
3. Select a project or create one for your agency.

   Tip: When looking at the dashboard for your project, select **Credentials** to see your API keys.

4. If your agency does not have an existing API key, create one by selecting **APIs & Services** > **Credentials**. Select **+CREATE CREDENTIALS** > **API key**.
5. Open the **Enabled APIs & services** page. From this page, you can enable specific APIs and services:

   a. Search for the Maps JavaScript API and enable it.
   b. Search for the Directions API and enable it.

6. Go to the **Credentials** page.

7. In the **API Keys** section, choose the API key you want to work with. The **Edit API key** page appears, where you can set restrictions:

   - Leave **Application restrictions** as **None**.
   - For **API restrictions**, restrict the key and restrict the usage to the Directions API and Maps JavaScript API.

   Note: You can allow more permissions if your agency uses this key for other products as well; however, the Directions API and the Maps JavaScript API must be enabled.

8. Provide the key to CentralSquare support, who will update the Mobiles API with the key. You can find your key from the menu by selecting **APIs & Services** > **Credentials** > **API Keys**.

   Tip: You can manage the key and add restrictions from **APIs & Services** > **Credentials** > **API Keys**.

For Google documentation, refer to https://support.google.com/googleapi/answer/6158862?hl=en.

Logging in

Your device must be connected to a data network to log in.

When you open the CentralSquare Mobiles app, the login page appears if you are not already logged in.

> **Note:** If you are setting up the app, select **SERVER SETTINGS**. Enter your server URL, and then select **SAVE**. For more setup information, see Getting started.

Enter your user name and password, and then select **Login**.

If you enter a valid user name and password, a confirmation message appears and updates are downloaded from Community Development. This can take several minutes, depending on the amount of data. Then, your home page appears.

If the user name or password you enter does not match a user who is set up in WUM, the message “Invalid credentials” appears. Enter valid credentials to log in.

Using CentralSquare Mobiles

Interact with your mobile device using your fingers. The following terminology is used in this guide for interacting with the touchscreen:

- Select: Quickly tap a button or option on the touchscreen. Use this gesture to open apps and choose options.
- Drag: Touch the screen and then move your finger to a different screen area while maintaining contact. Use this gesture to view a different area of the map.
- Pinch: Place two fingers on the touchscreen and then move them closer together or farther apart. Use this gesture to zoom in or out on a map.
- Swipe: Quickly slide one or more fingers across the touchscreen. Use this gesture to scroll.

For details about navigation in CentralSquare Mobiles, see Working in Community Development Mobiles.

Working offline

Your device must be connected to a data network to log in. However, after you log in, you can work offline if you lose your connection or want to save battery power. While offline, you can work with existing data from Community Development, make updates for uploading later, and use offline maps. Offline maps reflect the map as viewed before you went offline. All changes you make while working offline are saved in the app.

To synchronize updates to or from Community Development, connect your device to a data network and then select **Update** in the application header. For more information about uploading changes, see Synchronizing updates with Community Development.

> **Warning:** Pending changes are lost if you log out without updating Community Development. Be sure to upload changes before you log out.

Synchronizing updates with Community Development

As you update inspections, cases, and records in Mobiles, the updates are stored until you are ready to upload them to Community Development. When updates are pending, an indicator appears in the application header next to **Update**.

> **Important:** If you make changes on the Results page, be sure to select **QUEUE FOR UPDATE** before you go to a different inspection or case record. If you go to another record without selecting **QUEUE FOR UPDATE**, your changes on the Results page are discarded.

To send updates to and receive updates from Community Development:

1. Make sure your device is connected to a data network and can remain connected until updates are complete.
2. In the application header, select **Update**.
3. In the list, select **UPDATE**. Mobiles processes the updates and then displays the home page and a message indicating whether the update was successful or failed. If the update fails, check your data connection.

Important: Changes that fail to upload are *not* saved.

Tip: You can continue to work in Mobiles while the update is processing. Be sure your device remains connected to the data network until the update is complete.

Logging out

Warning: Pending changes are lost if you log out without updating Community Development. Be sure to upload changes before you log out.

To log out, select **Profile** in the application footer, and then select **Logout**. A warning message appears.

If there are no changes pending upload to Community Development, select **CONTINUE**.

If changes are pending upload to Community Development, select ✕ to close the message and remain logged in. Then, make sure your device is connected to a data network and select **Update** in the application header.

Working in Community Development Mobiles

The CentralSquare Mobiles interface includes a header and footer that are available on most pages, as well as navigation tools.

The header includes two options:

- Select to show or hide the left navigation pane.
- Select **Update** to receive updates from or send updates to Community Development.

The footer includes the following options:

- **Map**: Select to return to the home page from any location in the app.
- **Add**: Select to add an inspection or case.
- **Search**: Select to search for an activity record number or address.
- **Profile**: Select to sign off or change settings.

The following icons help you navigate in the app:

- indicates you can see more details by selecting the item.
- closes the current dialog box.
- indicates you can make changes by selecting the item.
- returns you to the previous dialog box or page.

Home page

The home page appears when you log in to CentralSquare Mobiles, and shows a list of your inspections, a map, and buttons to toggle between your inspections and your cases.

The inspections list is sorted by date and time. Each list item includes general details for the inspection, such as inspection type, activity record number, and address. Each inspection in the list is assigned a number that corresponds to a numbered pin on the map. Select an inspection to view more details about it.

To view your cases, select the **Cases** button. Your cases are sorted by date and time. Each list item includes general details for the case, such as case type, activity record number, and address. Each case in the list is assigned a number that corresponds to a numbered pin on the map. Select a case to view more details about it.

To show your inspections instead of cases, select the **Inspections** button.

Initially, the map is centered on your first inspection and shows the area where your inspections take place, a numbered pin for each inspection in your list, and the route between inspections.

To return to the home page from another page, select **Map** in the application footer.

Inspections list

The inspections list appears on your home page and other pages in Mobiles. When you open the Mobiles app, the inspections list is sorted by date and time, and includes inspections assigned to you that are due or overdue. Each inspection in the list is assigned a number that corresponds to a numbered pin on the map.

> **Note:** By default, completed, future, and voided inspections do not appear in your inspections list. To view all scheduled inspections or view inspections within a date range, go to the profile page and select **Inspection Filter Options**. To see all inspections on a record, go to the record's Summary page and select the **VIEW INSPECTIONS** link.

The inspections list shows the following information, if available, for each inspection:

- Inspection type
- Inspection date and time
- Order of the inspection in the route shown on the map

  Inspections are sorted by date and then by time. Inspections that were scheduled using the half day option (AM or PM) are sorted with AM as 8 AM and PM as 1 PM.
- Record number
- Inspection address

  If the inspection does not have an address associated with it, the message **Address Missing** appears. There is no corresponding pin on the map for inspections without an address.
- Record type, such as **PERMIT**, **CASE**, or **GEO**
- Overdue indicator

  If the inspection is overdue, **Overdue** appears next to the record type.

Select an inspection in the list to open the inspection menu to access inspection and record functions.

You can customize your inspection route. For more information about this feature, see Route options.

To view the Cases list rather than inspections, select the **Cases** button.

Cases list

The cases list appears on your home page and other pages in Mobiles. When you open the Mobiles app and then select the **Cases** button, the cases list appears, sorted by date and time, and includes cases assigned to you that are due or overdue. Each case in the list is assigned a number that corresponds to a numbered pin on the map.

The cases list shows the following information, if available, for each case:

- Case type
- Inspection time
- Order of the case in the route shown on the map
- Record number
- Address

  There is no corresponding pin on the map for cases without an address.

Select a case in the list to open the case menu to access case functions.

You can customize your case route. For more information about this feature, see Route options.

To view the inspections list rather than cases, select the **Inspections** button.

Using the map

The map is available on various pages in CentralSquare Mobiles. On your home page, the map shows the location of the first inspection in your list and your inspection route based on the order of inspections. The numbered pins on the map correspond to the inspections in your inspections list. Inspections without an address do not have a pin on the map.

Select a pin on the map to view all inspections for that address or to get directions to that site.

You can customize your inspection route. For more information about this feature, see Route options.

Map features depend on your device's capabilities and setup and can include:

- Zoom: Pinch the map to zoom in or out.
- Move: Drag to view a different area on the map.
- View: Choose standard or satellite view

Route options

The map shows your inspection locations and the route between them, in the order inspections appear in your inspections list. To change the order of inspections and your route, select **Route** above the map. Then, select an option:

- **Date & Time**: Sorts inspections by earliest to latest and changes the route accordingly. This is the default order of inspections.
- **Distance**: Sorts inspections by distance from your current location, closest to farthest, and changes the route accordingly.

You can also manually adjust the route order. In the inspections list or cases list, touch = to the left of the inspection or case and then drag the item to a different position in the list.

Getting directions

Select a pin on the map to see all inspections for that location. Then, select **Get Directions** to access turn-by-turn directions, with voice or without, depending on your device's capabilities and settings.

Inspection menu

View details about an inspection and access inspection functions from the inspection menu.

To show the inspection menu, select an inspection in your Inspections list. The menu appears on the right.

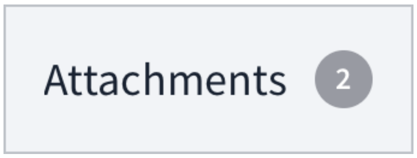
The inspection menu includes the following options:

- Summary: View details about the record, such as record status, subtype, and applied date, as well as user-defined fields (UDFs). You can also access all inspections on the record from this page.
- Results: Add a status and other details for the inspection.
- Attachments: Add photos and other files to the inspection.
- Fees: View paid and unpaid fees.
- Links: Access internet links available to all Community Development users.
- Restrictions: View restrictions on the land record that is associated with the inspection.
- Chronology: View and add activities associated with the record, such as phone calls and emails.
- Contacts: View or add individuals or businesses associated with the activity.
- Inspection Notes: View notes on the inspection record.
- Checklist: View and update the status of checklist items that must be completed for an inspection. This option appears only if a checklist is set up in WUM for the inspection type.
- Conditions: View conditions of approval on the record.
- Reviews: View reviews on the record.
- Activity Notes: View notes on the activity record.

You can change the order of items on the menu. For more details, see Customize Menu Order.

Number of items

If an area includes existing items, a number appears on the menu indicating the total number of items for that area. For example, if a permit has two attachments, the number 2 appears on the menu next to **Attachments**, like this:



In most cases, the indicator is gray. If an area has unresolved items such as fees due or uncleared restrictions, the indicator is red and shows the number of unresolved items, not the total number of items.

The following image shows a record with one attachment and one unpaid fee. The account might have additional fees that are paid:

The **Results** menu item does not show a number. When an inspection is resulted, it is removed from your inspections list.

To go to the home page, select **Map**.

Editing or reassigning an inspection

Use the EDIT feature to change the date or time of an inspection, assign the inspection to another inspector, or change the inspection type.

To use this feature:

1. In your inspections list or cases list, select the record you want to work with.
2. In the page header, select **EDIT**.
   The **Edit** dialog box appears.
3. To change the inspector, select **Inspector**. Select a name and then select **SAVE**.

   Note: You cannot reassign an inspection that has a result.

4. To change the type of inspection, select **Type**. Select the new type and then select **SAVE**.
5. To change the date of the inspection, select **Date**. Select the date and then select **Done**.

   Tip: If you change the date to a future date, the inspection no longer appears in your inspection list until the inspection due date.
6. To change the time of the inspection, select **Time**. Choose the time and then select **Done**.

   Note: Times available and inspection duration depend on your agency's settings in WUM.
7. After you make all changes you want to make, select **SAVE**.

Summary

The Summary page shows details about the record, such as record status, subtype, and applied date, as well as user-defined fields (UDFs). Specific details vary by record type, and UDFs depend on your agency's WUM setup. The fields on this page are read-only.

To go to the Summary page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Summary**.

The upper half of the Summary page shows standard fields related to the permit, project, license, land record, or case.

To view all inspections on the record, select the **VIEW INSPECTIONS** link to open the **INSPECTION HISTORY** page.

The lower half of the Summary page lists custom screens (user-defined fields) set up by your agency. Select a screen name in the list to see fields for that screen. These fields are read-only. For details about individual fields on a custom screen, contact your agency.

Inspection history

Use the Inspection History page to view details for all inspections on the record.

To access the Inspection History page, go to the Summary page and select the **VIEW INSPECTIONS** link. All inspections on the record are listed with inspection type, result, inspector, remarks, scheduled date, and completed date.

To narrow the list of inspections by inspection type, use the **Filter** field. Enter a word or part of a word to view only inspections that match your search text.

To view additional information and access additional features, select to open the **INSPECTION DETAIL** window for an inspection. For resulted inspections, the details in this window are view only. For inspections that are not resulted, you can:

- Reassign the inspection: Select **Inspector** and then select an inspector's name, or select **Assign To Me**.
- Add remarks: Select **Remarks** and then enter your text. Select **SAVE**.
- Change the scheduled date: Select **Scheduled Date** and select a date. Select **Done**.
- Change the scheduled time: Select **Scheduled Time** and select a time. Select **Done**.
- View inspection notes: Select .
- View the inspection checklist, if the inspection has a checklist: Select the inspection icon. The icon varies depending on the status of the checklist.

  indicates that the checklist is complete.

  indicates that one or more items on the checklist are incomplete.

  indicates that one or more items on the checklist failed.

  After you select the inspection icon in the **INSPECTION DETAIL** window, the summary of the checklist appears. Items on the checklist have one of the following icons:

This icon...	indicates a status of...
	PASS
	FAIL
	N/A
	no status assigned yet

  To close the **CHECKLIST** window, select .

  For more information about checklists, see Checklist.

To close the **INSPECTION DETAIL** window, select .

User-defined fields

The **USER-DEFINED FIELDS** (UDF) section of the Summary page shows custom screens set up by your agency. These fields are read-only in Mobiles.

To go to the Summary page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Summary**.

To view fields for a custom screen, select the screen name in the **USER-DEFINED FIELDS** section.

If the field text is too long to show, an ellipsis (...) appears at the end of the displayed text. Select the field to view the full text. Then, select ← or ✕ to return to the custom screen.

To return to the Summary page from the custom screen, select ←.

For details about individual fields on a custom screen, contact your agency.

Summary page for cases

The Summary page shows the following details for cases:

- **Status**: Status of the case, such as **SUBMITTED** or **ASSIGNED**.
- **Location**: Specific area of the property where the violation occurs, such as back yard, side entrance, or alley.
- **Officer**: Officer assigned to the case.
- **SubType**: Additional classification of the case type.
- **Case Name**: Description of the case.
- **Referred**: Agency you referred the case to, such as the police department.
- **Opened**: Date the case was opened.
- **Closed**: Date the case was closed.
- **Last Actn**: Latest Chronology action date on the record.
- **Follow-Up**: Latest followup or Chronology action date on the record.
- User-defined date field: Your agency defines the label and use of this date field. The label is defined in WUM by a system administrator.

To go to the Summary page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Summary**.

Summary page for land records

The Summary page shows the following details for land records:

- **Type**: Category of land record.
- **Status**: Status of the land record, such as **ACTIVE** or **LOCKED**.
- **Alternate ID**: GIS site alternate ID.
- **Total Value**: Total value of the property (land value + improvements value).
- **Address**: Street address for the land record.
- **City**: City in which the land is located.
- **State**: State in which the land is located.
- **Zip**: ZIP Code in which the land is located.
- **Subdivision**: Subdivision in which the land is located.
- **Tract**: Tract name or number.
- **Block**: Block name or number.
- **Lot**: Lot name or number.
- **Site Info**: Additional information about the land record.

To go to the Summary page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Summary**.

Summary page for licenses

The Summary page shows the following details for licenses:

- **Subtype**: Additional classification of the license type.
- **Status**: Status of the license, such as **APPLIED** or **RENEWAL PENDING**.
- **Licensee Name**: Name of the person or business who applied for the license.
- **Applied**: Date the license application was submitted.
- **Expiration**: Date the license expired.
- **Issued**: Date the license was issued.
- User-defined Info 1 Text 1–4 fields: The labels and use for these fields are defined by your agency.
- **FEIN or SSN**: Federal Employer Identification Number (FEIN) or social security number of the licenseholder.
- User-defined Info 1 Text 6–8 fields: The labels and use for these fields are defined by your agency.

To go to the Summary page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Summary**.

Summary page for permits

The Summary page shows the following details for permits:

- **Subtype**: Additional classification of the permit type.
- **Status**: Status of the permit, such as **APPLIED** or **APPROVED**.
- **Description**: Description of the permit.
- **Applicant**: Name of the person or business who submitted the permit application.
- **Applied**: Date the permit application was submitted.
- **Approved**: Date the permit application was approved.
- **Issued**: Date the permit was issued.
- **Finaled**: Date the final inspection passed.

- **Expired**: Date the permit expired.
- User-defined date field: Your agency defines the label and use of this date field. The label is defined in WUM by a system administrator.

To go to the Summary page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Summary**.

Summary page for projects

The Summary page shows the following details for projects:

- **Subtype**: Additional classification of the project type.
- **Description**: Description of the project.
- **Planner**: Name of the project's planner.
- **Applied**: Date the project application was submitted.
- **Approved**: Date the project application was approved.
- **Closed**: Date the project was closed.
- **Expired**: Date the project expires.
- **Status**: Status of the project, such as **APPLIED** or **ACTIVE**.
- **Due Date**: Due date.

To go to the Summary page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Summary**.

Results

From the Results page, you can:

- Result an inspection and add details about the inspection.
- Add a standard note.

- Produce reports.
- View custom screens with inspection user-defined fields (UDFs).

To go to the Results page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with. For inspections, the Results page appears.
3. For cases only, select **Results**.

To result an inspection:

1. Select **Result** and then select a status.

   Note: **Completed Date** is automatically set to the current date.

2. Select **Completed Time** and then select a time. Select **Done**. Or, select **Cancel** if you do not want to set the completed time.

   Note: Times available depend on your agency's settings in WUM.

3. To put time on your time sheet for this inspection, select **Time Sheet** and then enter the amount of time.
4. To add a short comment about the inspection, such as a gate code or specific time, select **Remarks** and then enter a short comment.
5. To enter detailed information about the inspection, select **Notes** and then enter the note text.
6. To add a standard note, select **ADD STANDARD NOTE**. Select the note you want to add and then select **ADD**. You can select multiple standard notes. Or, select ✕ to close without saving your changes.
7. To save your changes, select **UPDATE**.

   Tip: If you are working offline, the message "In Queue" appears on the inspection in your inspections list and an indicator appears in the application header next to **Update**. You can change the result fields any time before changes are uploaded to Community Development. For more information about updating Community Development with your changes, see Synchronizing updates with Community Development.

To view custom screens with inspection user-defined fields (UDFs), scroll on the page. If the inspection does not have custom screens, the message "No custom screens" is displayed.

Important: If you make changes on the Results page, be sure to select **QUEUE FOR UPDATE** before you go to a different inspection or case record. If you go to another record without selecting **QUEUE FOR UPDATE**, your changes on the Results page are discarded.

Producing reports

If your agency set up inspection reports, you can produce reports from the Results page and then print, email, or attach the report. The reports are defined by your administrator in WUM.

To go to the Results page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with. For inspections, the Results page appears.
3. For cases only, select **Results**.

To produce an inspection report:

1. Select **CREATE REPORT**.
2. Select **Contact** and then select the name of the contact you want to share this report with. If the list of options is long, use **Search** to narrow the list. Select **SAVE**.
3. Select **Report** and then select the report you want to produce. If the list of options is long, use **Search** to narrow the list. Select **SAVE**.
4. Select **CONTINUE**.
5. Depending on the report setup in WUM, the following sections can appear:
    - Legal notice: If this section appears, show the legal notice to the contact so he or she can read it.
    - Signature box: If this section appears, have the contact sign in the signature box. To clear the signature and sign again, select **CLEAR SIGNATURE** and then sign.

    Select **CONTINUE** or **SAVE SIGNATURE** to go to the next step.
6. The report appears. If you took photos while working the inspection, the photos appear in the report.

    Choose from the following options:
    - **PRINT**: To print the report, select **PRINT**. Select print options such as printer, number of copies, or color. These options might vary by device. Then, select print.

Tip: The **PRINT** button is available only if your device is connected to a data network.

- **EMAIL**: To email the report to a contact, select **EMAIL**.

  To send the email to additional recipients, enter the email address for each additional recipient in **To**, **Cc**, or **Bcc**.

  By default, the subject of the email is *record type*:*record numbercontact name*. For example, PERMIT:BLD1811-0033 John Doe. To change the subject, enter your changes in **Subject**. Then, select **Send**.

  Note: You cannot change the body of the email.

  Tip: The **EMAIL** button is available only if your device is connected to a data network.

- **ATTACH AS PDF**: To attach the report to the record as a PDF (portable document format), select **ATTACH AS PDF**. The report is attached to the record.
- **OPEN WITH**: To open the file using an app on your device, select **OPEN WITH**.

7. To return to the Results page, select ✕.

Attachments

The Attachments page shows attachments such as photos that are associated with the inspection. From this page, you can:

- View thumbnails of attachments currently associated with the inspection.
- View details about an attachment.
- Upload an existing file to the inspection.
- Take a photo using your mobile device and attach it to the inspection.
- Email an attachment.
- Print an attachment.
- Delete an attachment.
- Edit the attachment's file name or description.

To go to the Attachments page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Attachments**.

Adding attachments

Add attachments—such as photos and PDF files that are on your mobile device—to an inspection from the Attachments page. After you add an attachment, you can view, email, or print the attachment, as well as change the file name or description.

When you take photos from the Attachments page or Results page, those photos are added to the record as attachments and appear on reports.

> **Note:** The CentralSquare Mobiles app does not limit the file size of attachments. However, Community Development limits attachments to 500 MB, so you might encounter errors if you try to upload larger files. Also, your agency's servers might be configured to limit file sizes. Your agency might need to configure servers and/or IIS to allow uploading large files.

To go to the Attachments page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Attachments**.

To add an attachment:

1. Select **Upload**.
2. Select either **Upload Images** or **Upload PDF**.

   Note: Select **Cancel** to return to the Attachments page without adding an attachment.
3. Use your device's browse feature to find and select the file.

   Note: Community Development limits attachments to 500 MB, so you might encounter errors if you try to upload larger files.
4. To change the file name, enter the new file name in **File Name**.

   Note: The file name must include an extension, such as jpg. If you change the file name, ensure the extension is still included and is the same as in the original file name.
5. To add a description, enter it in **Description**.
6. Select **SAVE** to complete the process. Or, select **RETAKE** to return to the Attachments page without adding the attachment.

Viewing attachments

View attachments and attachment details from the Attachments page.

To go to the Attachments page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Attachments**.

To view attachment details, select the attachment. Details include file name, date, time, and description.

> **Note:** For PDF files, a PDF icon appears with the details. Select the PDF icon to view the PDF file. For image files, the image appears with the details. Select the image to view a larger version of the image. To close the attachment and return to the attachment details, select **Done**.

After you review the details, select ✕ to close, or select one of the following actions:

- Select **OPTIONS**, and then Emailing attachments or Printing attachments.
- Select the file name to change the file name. Select the description to change the description. To save your changes, select **SAVE**.

Editing attachment details

Edit an attachment's file name or description from the Attachments page.

> **Note:** You can edit attachment details only if the file is not yet uploaded Community Development.

To go to the Attachments page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Attachments**.

To edit an attachment's file name or description:

1. Select the attachment.
2. To change the file name, enter the new file name in **File Name**.

Note: The file name must include an extension, such as jpg. If you change the file name, ensure the extension is still included and is the same as in the original file name.

3. To add or change the file description, update **Description**.

   Tip: To email or print the attachment, select **OPTIONS** and then select Emailing attachments or Printing attachments. Complete the steps for sending the email or printing the attachment.

4. Select **SAVE**.

Emailing attachments

From the Attachments page, you can send an attachment by email to a contact associated with the record or to another recipient.

Tip: To use this feature, email must be set up on your mobile device *and* your device must be online (connected to a data network). For email setup information, refer to the help documentation for your device or email app.

To go to the Attachments page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Attachments**.

To send an attachment in an email:

1. Select the attachment you want to send.
2. Select **OPTIONS**, and then select **EMAIL**.
3. Select a contact to send the email to. If the list of options is long, use **Search** to narrow the list. Select **SAVE**.
4. To send the email to additional recipients, enter the email address for each additional recipient in **To**, **Cc**, or **Bcc**.
5. By default, the subject of the email is *record type*: *applied ID*:*xxx your user ID*, where *applied ID* is the user ID associated with the applied date, *xxx* is the record number, and *your user ID* is the ID you use to log in to Community Development or Mobiles. For example: PERMIT: JCM:1812050145030176 JEN. To change the subject, enter your changes in **Subject**.

6. To change the file name, select the file name in the email and then make your changes.

   Note: The file name must include an extension, such as jpg. If you change the file name, ensure the extension is still included and is the same as in the original file name.

   Note: You cannot change the body of the email.

7. Select **SEND** to send the email. To close without sending the email, select **CANCEL**.

Printing attachments

Print an attachment from the Attachments page.

To go to the Attachments page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Attachments**.

To print an attachment:

1. Select the attachment you want to print.
2. Select **OPTIONS**, and then select **PRINT**.
3. Select print options such as printer, number of copies, or color. These options might vary by device.
4. Select the print function.

Taking a photo

From the Attachments page or Results page, you can take photos and attach them to an inspection.

When you take photos from the Attachments page or Results page, those photos are added to the record as attachments and appear on reports.

The process is the same whether you start on the Attachments page or Results page, so only one set of instructions is provided.

Note: The CentralSquare Mobiles app does not limit the file size of attachments. However, Community Development limits attachments to 500 MB, so you might encounter errors if you try to upload larger files. Also, your agency's servers might be configured to limit file sizes. Your agency might need to configure servers and/or IIS to allow uploading large files.

To go to the Attachments page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Attachments**.

To go to the Results page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with. For inspections, the Results page appears.
3. For cases only, select **Results**.

To take a photo and attach it to the inspection:

1. Select **TAKE PICTURE**.
2. If a message appears asking for access to the camera, choose whether you want to take photos through Mobiles:
   - If you allow camera access, continue with this procedure.
   - If you do not allow camera access, you cannot take pictures through Mobiles, so you cannot complete this procedure. However, you can take pictures using the camera on your device, and then Adding attachments the pictures to Mobiles.

   Tip: Depending on your device, you might be able to change your selection through device settings.
3. Take the photo using your device's controls.
4. If the photo meets your needs, select **Use Photo**. To take the photo again, select **Retake**.
5. If a message appears asking for access to your photo library, choose whether to allow access:
   - If you allow access, Mobiles attaches the photo to the inspection and saves the photo to your device's photo gallery.

- If you do not allow access, Mobiles attaches the photo to the inspection without saving it to your device's photo gallery.

6. To change the file name, enter the new file name in **File Name**.

   Note: The file name must include an extension, such as jpg. If you change the file name, ensure the extension is still included and is the same as in the original file name.

7. To add a description, enter it in **Description**.
8. Select **SAVE** to complete the process. Or, select **RETAKE** to return to the Attachments page without adding the attachment.

Note: Community Development limits attachments to 500 MB, so you might encounter errors if you try to upload larger files.

Deleting attachments

If you added an attachment in error, you can delete it.

Important: You can delete attachments only if they are not yet uploaded to Community Development.

To go to the Attachments page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Attachments**.

To delete an attachment:

Important: When you follow these steps, the attachment is deleted immediately. This action cannot be undone.

1. Select the attachment.
2. Select **OPTIONS**, and then select **DELETE**.

Fees

From the Fees page, you can view outstanding fees, the total outstanding fee amount, and paid fees.

Note: You cannot add, change, or take payment for fees in Mobiles.

To go to the Fees page:

1. In your inspections list or cases list, select the record you want to work with.
2. Select **Fees**. The **Outstanding Fees** list appears.
   To view paid fees, select **Paid Fees**.
   To return to the list of outstanding fees, select **Outstanding Fees**.

Outstanding Fees shows the description of the fee (**Fee Item**) and amount due for fees on the record that are not paid in full. In the lower part of the window, **OUTSTANDING FEE BALANCE** shows the total amount of all fees due on the record.

Paid Fees shows the description of the fee (**Fee Item**) and amount paid for fees that are partially paid or fully paid on the record.

To see more details, select a fee. **FEE DETAILS** appears with the following information:

- **Fee Item**
- **Fee Code**
- **Quantity**
- **Total Fee**
- **Amount Paid**
- **Paid Date**
- **Amount Due**

To return to the Fees page, select ←.

Links

The Links page provides access to often-used references and information sources online, such as building codes, agency ordinances, or your agency's website. Links are set up in WUM.

To go to the Links page:

1. In your inspections list or cases list, select the record you want to work with.
2. Select **Links**.

Select a link to open that link in your device's web browser.

> **Note:** To use this feature, your device must be connected to a data network.

Restrictions

The Restrictions page shows restrictions on the land record that is associated with the inspection or case. For example, a restriction might indicate that a property is in a historic district and must meet codes related to materials and design. From the Restrictions page, you can view, edit, or add restrictions.

To go to the Restrictions page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Restrictions**.

The Restrictions page shows the restriction type and restriction remarks for each restriction. To view full details for a restriction, including date added, full remarks text, and notes, select . To return to the Restrictions page, select ✕ .

Adding restrictions

Add restrictions from the Restrictions page.

To go to the Restrictions page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Restrictions**.

To add a restriction:

1. Select **ADD RESTRICTION**.
2. Select **Restriction Type** and then select a type. Select **SAVE**.
3. Select **Date Added** and then select the date. Select **Done**.
4. To add a remark, select **Remarks** and then enter the text. Select **SAVE**.
5. To add a note, select **Notes** and then enter the text. Select **SAVE**.
6. Select **SAVE**. Or, select ✕ to close without saving your changes.

Editing restrictions

Edit a restriction from the Restrictions page.

To go to the Restrictions page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Restrictions**.

To edit a restriction:

1. Select .
2. Select **EDIT**.
3. To change the restriction type, select **Restriction Type**, and then select a type. Select **SAVE**. If you do not want to save your changes, select ← or ✕.
4. To change the date the restriction was added, select **Date Added** and then select the date. To save your changes, select **Done**. If you do not want to save your changes, select **Cancel**.
5. To add or change the remark for this restriction, select **Remarks** and then enter the text. Select **SAVE**. If you do not want to save your changes, select ← or ✕.
6. To add or change the note for this restriction, select **Notes** and then enter the text. Select **SAVE**. If you do not want to save your changes, select ← or ✕.
7. Select **SAVE**. Or, select ✕ to close without saving your changes.

Violations

The Violations page shows all code enforcement violations related to a case. From the Violations page, you can view, edit, or add violations.

To go to the Violations page:

1. In your cases list, select the record you want to work with.
2. Select **Violations**.

The Violations page shows violation type, status, date the violation was observed, and deadline for correcting the violation. To view full details for a violation, select . Full details include:

- **Type**: Violation type.
- **Status**: Status of the violation, such as **Compliance** or **Noncompliance**.
- **Location**: Specific area of the property where the violation occurs, such as back yard, side entrance, or alley.
- **Remarks**: Short comment about the inspection, such as a gate code or specific time.
- **Observed**: Date the violation was first observed by an inspector or officer.
- **Corrected**: Date by which you want the issue to be corrected. This date cannot be in the past.
- **Compliance**: Date that an inspector verified that the issue was corrected.
- **Notes**: Detailed information about the violation. If the field text is too long to show, an ellipsis (...) appears at the end of the displayed text. Select the field to view the full text. Then, select ← or ✕ to return to the violation details.

  You can also add standard notes or manual notes from this dialog box.

To return to the Violations page, select ✕ .

Adding violations

Add violations from the Violations page.

To go to the Violations page:

1. In your cases list, select the record you want to work with.
2. Select **Violations**.

To add a violation:

1. Select **ADD VIOLATION**.
2. Select one or more violation types. To see a description of a violation type, select ⓘ.

   Select **SAVE**. The violations you added are listed on the Violations page showing the violation type only.
3. Select the violation you just added.

4. The **Status** field is required. If your agency has a violation status of **NONCOMPLIANCE**, **Status** is automatically set to **NONCOMPLIANCE**. To apply a different status to this violation, select **Status** and then select a status. Select **SAVE**.

   If your agency does not have a violation status of **NONCOMPLIANCE**, the **Status** field is blank. Select **Status** and then select a status. Select **SAVE**.

5. To add the specific area of the property where the violation occurs, select **Location** and then enter the details, such as back yard, side entrance, or alley.
6. To add a short comment about the violation, select **Remarks** and then enter a short comment. Select **SAVE**.
7. **Observed** defaults to the current date. If you want to change the date the violation was first observed by an inspector or officer, select **Observed** and then select the date. Select **SAVE**.
8. To add or change the date by which you want the issue to be corrected, select **Corrected** and then select the date by which you want the issue to be corrected. *This date cannot be in the past.* Select **SAVE**.
9. If the violation is resolved, select **Compliance** and then select the date that an inspector verified that the issue was corrected. Select **SAVE**.
10. To add standard notes to the violation, select **ADD STANDARD NOTES**. Select one or more standard notes to add. If the list of available notes is long, use the Search feature to narrow the list. After you select the standard notes you want to add, select **SAVE**.
11. To enter detailed information about the inspection, select **ADD NEW NOTE**, and then enter notes about the violation. Select **SAVE**.
12. Select **SAVE**.
13. If you selected more than one violation type in step 2, repeat steps 3–11 for each violation you added.

Editing violations

Edit a violation from the Violations page.

To go to the Violations page:

1. In your cases list, select the record you want to work with.
2. Select **Violations**.

To edit a violation:

1. Find the case you want to work with and then select .
2. To change the violation type, select **Type** and then select the new type. To see a description of a violation type, select .Select **SAVE**.
3. To change the status, select **Status** and then select the new status. Select **SAVE**.
4. To add or change the specific area of the property where the violation occurs, select **Location** and then modify the details. Select **SAVE**.
5. To add or change the short comment about the violation, select **Remarks** and then enter the comment. Select **SAVE**.
6. To change the date the violation was first observed by an inspector or officer, select **Observed** and then select the date. Select **SAVE**.
7. To add or change the date by which you want the issue to be corrected, select **Corrected** and then select the date. *This date cannot be in the past.* Select **SAVE**.
8. To add or change the date the violation was resolved, select **Compliance** and then select the date that an inspector verified that the issue was corrected. Select **SAVE**.
9. To view existing notes, select **Notes**. To close the **VIOLATION DETAILS** window, select ✕.
10. To add standard notes to the violation, select **ADD STANDARD NOTES**. Select one or more standard notes to add. If the list of available notes is long, use the Search feature to narrow the list. After you select the standard notes you want to add, select **SAVE**.
11. To add detailed information about the inspection, select **ADD NEW NOTE**, and then enter notes about the violation.

    Select **SAVE**.
12. Select **SAVE**.

Chronology

The Chronology page shows a list of activities associated with the record, such as phone calls, emails, and events. From the Chronology page, you can view, edit, and add actions.

To go to the Chronology page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.

2. In your inspections list or cases list, select the record you want to work with.
3. Select **Actions**.

The Chronology page shows the completed date and action type for each action.

To view more details about an action, select ↗. If the action contains a long note or multiple notes, select the note field to view the entire note or notes. To return to the details, select ← or ✕.

To return to the Chronology page, select ✕.

Adding actions

Add actions, such as phone calls, emails, or events, from the Chronology page. You can add completed actions only; you cannot add actions to complete later.

To go to the Chronology page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Actions**.

To add an action:

1. Select **ADD ACTION**.
2. Select **Action Type** and then select an action type. If the list of options is long, use **Search** to narrow the list. Select **SAVE**.
3. Select **Staff** and then select a staff member. If the list of options is long, use **Search** to narrow the list. Select **SAVE**.
4. If the action is complete, select **Completed Date** and then select a date.
5. To add a note, select **Notes**. Enter the note text. Select **SAVE**. If you do not want to save your changes, select ← or ✕.

   Note: When you add an action, you can add only one note. If you update the note multiple times during the add process, only the last text you enter is saved.

6. Select **SAVE**.

Editing actions

Edit actions, such as phone calls, emails, or events, from the Chronology page.

To go to the Chronology page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Actions**.

To update an existing action:

1. Select .
2. Select **Edit**.
3. To change the type of action, select **Action Type** and then select an action type. If the list of options is long, use **Search** to narrow the list. Select **SAVE**. If you do not want to save your changes, select ← or ✕.
4. To change the person who is responsible for completing the action, select **Staff** and then select a staff member. If the list of options is long, use **Search** to narrow the list. Select **SAVE**. If you do not want to save your changes, select ← or ✕.
5. To add or change the date the action was completed, select **Completed Date** and then select a date. Or, select **Clear** to return to the previous dialog box without making changes.
6. You cannot change existing notes. To add a note, select **CREATE NEW NOTE** and then enter the text of the note. Select **SAVE**. If you do not want to save your changes, select ← or ✕.
7. Select **SAVE**.

Contacts

The Contacts page shows all contacts associated with the inspection. From this page, you can view, edit, or add contact details.

To go to the Contacts page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.

2. In your inspections list or cases list, select the record you want to work with.
3. Select **Contacts**.

To view all details for a contact, select . Select to return to the Contacts page.

Adding contacts

Add contacts for an inspection from the Contacts page.

To go to the Contacts page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Contacts**.

To add a contact:

1. Select **ADD CONTACT**.
2. Select **Name** and then enter the contact's name.
3. Select **Contact Role** and then select the contact's role for this record.

   Note: Each contact role can be assigned to only one contact on the record. For example, if a record already has a contact assigned the role of **Owner**, you cannot add another contact with the contact role of **Owner**.

4. Enter other details for the contact—such as email address, phone numbers, and address—by selecting a field and then entering text.
5. To add or change additional information, select **Additional Information**. Enter the text. Select **SAVE**. If you do not want to save your changes, select or .
6. Select **SAVE**.

Editing contacts

Edit a contact's information from the Contacts page.

To go to the Contacts page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.

2. In your inspections list or cases list, select the record you want to work with.
3. Select **Contacts**.

To update a contact's information:

1. Select .
2. Select **EDIT**.
3. You cannot change **Name** or **Contact Role**, but you can change the other details. Select the field you want to change and then add or change the information.
4. To add or change additional information, select **Additional Information**. Enter or change the text. Select **SAVE**. If you do not want to save your changes, select or .
5. Select **SAVE**.

Inspection Notes

Mobiles includes two **Notes** pages: one for inspection notes and one for activity record notes.

To go to the Inspection Notes page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Inspection Notes**.

Each note on the Notes page shows the following details:

- **Remarks**: Remarks added to the inspection.
- **Date**: Date the note was added.
- **Type**: Source of the note. For inspection notes, this is always **INSPECTION**.
- **Note**: Text of the note. If the note is too long to show in the list, an ellipsis (...) appears at the end of the displayed text. Select to view the entire note. Then, select to return to the Notes page.

To add a note, select **CREATE NOTE**. Enter the text. Select **SAVE**. The note is added to Community Development when you select **Update**.

Checklist

If the current inspection includes a checklist, complete the checklist from the Checklist page.

> **Tip:** This page is available only if a checklist is set up in WUM for the inspection type. Your agency's system administrator configures checklists in WUM. Depending on the checklist setup, the inspection status might be assigned automatically or updates to the inspection might be restricted based on the status of checklist items.

You can also add ad hoc checklist items on the Checklist page.

To go to the Checklist page:

1. In your inspections list or cases list, select the record you want to work with.
2. Select **Checklist**.

To complete the checklist:

1. Select a status for each item in the checklist:
    - **PASS**: If the item is complete and passes inspection, select this box.
    - **FAIL**: If the item is not complete or does not pass inspection, select this box.
    - **N/A**: If the item is not applicable, select this box.

    Tip: If the item name is long, shortened text appears followed by an ellipsis (...). Select the text to see the full item name.
2. To work with notes for a checklist item, select **NOTE**. The window shows all existing checklist notes for the item.

    To add a note, select **ADD NEW NOTE** and then enter the note text. Select **SAVE**.

    You cannot change or delete checklist notes in the Mobiles app.
3. To add an ad hoc item to the checklist, select **ADD LIST ITEM**. Enter the item label, which is the text that appears on the Checklist page. Select **SAVE**.
4. On the Checklist page, select **SAVE**.

Conditions

The Conditions page shows conditions of approval on the record. From this page, you can view condition details.

> **Note:** Conditions can be added to a record in Community Development only. You cannot add conditions in Mobiles.

> **Tip:** Cases cannot have conditions.

To go to the Conditions page:

1. In your inspections list or cases list, select the record you want to work with.
2. Select **Conditions**.

The Conditions page shows the condition type and status for each condition. To view more details for a condition, select ›. If the condition contains long remarks or notes, select the field to view the full text. To return to the details, select ← or ✕.

To return to the Conditions page, select ←.

Reviews

From the Reviews page, you can view all reviews on the activity record.

> **Note:** You cannot add or change reviews in Mobiles.

> **Note:** Reviews are not applicable for cases.

To go to the Reviews page:

1. In your inspections list or cases list, select the record you want to work with.
2. Select **Reviews**. The Reviews page appears.

In the listing, the following fields appear for each review:

- **Review Type**: Type of review.
- **Status**: Status of the review, such as **APPROVED** or **UNDER REVIEW**.
- **Reviewer**: Person assigned to this review.
- **Sent**: Date the review items were sent to the reviewer.

To see more details, select a review. **REVIEW DETAILS** appears with the following information:

- **Review Type**: Type of review.
- **Status**: Status of the review, such as **APPROVED** or **UNDER REVIEW**.
- **Reviewer**: Person assigned to this review.
- **Due**: Date the review items are due back.
- **Sent**: Date the review items were sent to the reviewer.
- **Returned**: Date the review was completed, if the review is complete.
- **Assigned**

- **Group**: Review group that this review belongs to.
- **Remarks**: Short comment about the review.
- **Sent By**
- **Received By**
- **Notes**: Notes related to this review.

To return to the Reviews page from **REVIEW DETAILS**, select ←.

Activity Notes

Mobiles includes two **Notes** pages: one for inspection notes and one for activity record notes.

To go to the Activity Notes page:

1. In the inspections list pane, select **Inspections** to work with inspections, or select **Cases** to work with cases.
2. In your inspections list or cases list, select the record you want to work with.
3. Select **Activity Notes**.

Each note on the Notes page shows the following details:

- **Date**: Date the note was added.
- **Type**: Source of the note. For activity record notes, this is the type of activity record, such as **PERMIT** or **GEO**.
- **Note**: Text of the note. If the note is too long to show in the list, an ellipsis (...) appears at the end of the displayed text. Select › to view the entire note. Then, select ✕ to return to the Notes page.

To add a note, select **CREATE NOTE**. Enter the text. Select **SAVE**. The note is added to Community Development when you select **Update**.

Add

+ **Add** in the application footer enables you to add an inspection or add a case to a record.

> **Note:** To use this feature, your device must be connected to a data network.

You can also add an inspection from the Inspection History page. For more details about this page, see Inspection history.

To add an inspection or case from the home page:

1. In your inspections list or cases list, select the record you want to work with.

   Or, if you want to search for a record, skip this step.

   > **Note:** If you search for a record, **ADD CASE** is not always available for certain records.

2. In the application footer, select + **Add**.
3. If you want to add an inspection to a record you selected, go to the next step.

   To search for a record, enter part of the address or activity record number in **Search**, and then select **SUBMIT**. A list of matching records appears, grouped by record type.

   If the list is long, use the Filter feature to narrow the list by record type.

   From the search results, select a record to see more details.

   To add the inspection or case to this record, go to the next step. Or, select Back to return to the search results and choose a different record.
4. Select **ADD INSPECTION** or **ADD CASE**.

   ADD CASE is available only if the record you selected has an address associated with it. Also, if you searched for a record, **ADD CASE** is not always available for certain records.
5. Complete the fields.
6. Select **SAVE**.

Adding an inspection

+ **Add** in the application footer enables you to add an inspection or add a case to a record.

> **Note:** To use this feature, your device must be connected to a data network.

You can also add an inspection from the Inspection History page. For more details about this page, see Inspection history.

To add an inspection from + **Add**:

1. In your inspections list or cases list, select the record you want to work with.
   Or, if you want to search for a record, skip this step.
2. In the application footer, select + **Add**.
3. If you want to add an inspection to a record you selected, go to the next step.
   To search for a record, enter part of the address or activity record number in **Search**, and then select **SUBMIT**. A list of matching records appears, grouped by record type.
   The list contains records that include your search text in any part of the address or in the beginning of the activity record number. For example, if you enter **123 Main**, results include 123 Main St. and 123 Mainland Rd. If you enter **BUS**, results include the address 1000 Business Center Dr. and activity record BUS1810-0002.
   If the list is long, use the Filter feature to narrow the list by record type. Select **Filter**, then select one or more record types, and then select **APPLY**.
   From the search results, select a record to see more details.
   To add the inspection to this record, go to the next step. Or, to choose a different record, select Back to return to the search results.
4. Select **ADD INSPECTION**.
5. Select **Type**, and then choose a type. Select **SAVE**.
6. Select **Date** and then choose a date. Select **Done**.
7. Select **Time**, and then choose a time. Select **Done**.
8. Select **SAVE**. The inspection is added and assigned to you. If the inspection date is today or overdue, the new inspection shows in the inspections list on the home page.

Adding a case

+ **Add** in the application footer enables you to add an inspection or add a case to a record.

> **Note:** To use this feature, your device must be connected to a data network.

To add a case:

1. In your inspections list or cases list, select the record you want to work with.
   Or, if you want to search for a record, skip this step.

   > **Note:** If you search for a record, **ADD CASE** is not always available for certain records.

2. In the application footer, select + **Add**.
3. If you want to add a case to a record you selected and the **ADD CASE** option is available, go to the next step.

   To search for a record, enter part of the address or activity record number in **Search**.

   Select **Filter**. In the dialog box, select **Geo**. Clear all other filter options. Select **SAVE**.

   Select **SUBMIT**. A list of matching records appears.

   Select the record you want to work with.
4. Select **ADD CASE**. **ADD CASE** is available only if the record you selected has an address associated with it. Also, if you searched for a record, **ADD CASE** is available for cases and land records only.
5. Select **Type**, and then choose a type. Select **SAVE**.
6. If subtypes are set up for the type you selected, select **Subtype**, and then choose a subtype. Select **SAVE**.
7. Select **Status**, and then choose a status. Select **SAVE**.
8. Select **Prefix**, and then choose a prefix. Select **SAVE**.
9. To specify the location of the issue on the property, select **Location**. Enter the location details.
10. To add a description, select **Case Name**. Enter the description text. Select **SAVE**.
11. To add notes, select **Notes**. Enter the note text. Select **SAVE**.
12. Select **SAVE**. The case is added and assigned to you. If the case is due today or overdue, the new case shows in the cases list on the home page.

Search

Use the Search feature to find records by address or activity record number within a certain area.

> **Note:** To use this feature, your device must be connected to a data network.

To go to the Search page, select **Search** in the application footer.

To search, complete the following steps:

1. On the map, zoom to the area you want to search in.
2. If you want to filter by specific modules, select **Filter**. Select or clear modules you want to include or exclude and then select **SAVE**.

   > **Note:** Initially, land records are excluded from the search.

   > **Note:** When you change and save filter selections, those selections are saved *to the device* you are working on. Those selections remain in effect *on that device* until you change them, even if you log out of the application and log back in. If another user logs in to CentralSquare Mobiles on your device, that user sees your filter selections, but can change them. If you log in to CentralSquare Mobiles on a different device, the filter selections on that device are used unless you change them.

3. In the search field, enter the text you want to search for. The text can be part or all of an address or activity record number.
4. Select **SEARCH**.

The map shows pins for each search result. In the left pane, search results appear, sorted by module and then by record number. The results list contains records that include your search text in any part of the address or activity record number. For example, if you enter **COM**, results include activity record numbers COMM2022-00001 and BCOM-1801 as well as addresses on Commercial St.

Select a record in the list to view more details about it. To return to the results list, select ✕.

Initially, 25 results are listed. Scroll through the list to load more results. If the total number of results exceeds 250, a message appears to indicate you should refine your search. Narrow your search by zooming in on the map, changing the filters to search fewer modules, or changing the search text.

If no records are associated with the address you entered, the message "No Results Found" appears.

Profile

To access your user and server settings, or to log out, select **Profile** in the application footer. The profile page includes application, styling, help, and log out options.

CUSTOMIZE APPLICATION

Activate Current Location: Turn this setting on to allow CentralSquare Mobiles to use your device's location. Turn this setting off to block CentralSquare Mobiles from using your location. If this setting is off, you cannot search or use certain map features.

Dismiss modals quickly: Turn this setting on if you want to be able to close dialog boxes by selecting outside the dialog box (rather than selecting ✕). Turn this setting off to always use ✕ to close dialog boxes.

Customize Menu Order: You can change the order of the menu options in the inspection menu and case menu that appear on the right when you select an inspection or case. To change the menu order, select **Customize Menu Order**. For detailed steps, see Customize Menu Order.

Inspection Filter Options: By default, current and overdue inspections and cases appear on the home page. Using the inspection filter options, you can choose to include all open inspections (overdue, current, and future) or inspections from a specific date range. For more details, see Inspection Filter Options.

Number of Inspections To Load: Select the number of inspections you want to see on the home page. If you have more inspections than the number you select, inspections are shown based on scheduled date and time.

STYLING

Select the color scheme you want to use:

- **Inherit From Device**: Use the mode selected for your device in your device's settings.

  Note: Your device might not include all the options that Mobiles provides.

- **Light**: Use light mode, which has a light background and dark text.
- **Dark**: Use dark mode, which has a dark background and light text.
- **High Contrast**: Use high contrast mode, which uses a limited color set and combines very bright and very dark colors for maximum contrast between elements on the screen.

HELP DOCUMENT

To access online help for Mobiles, select .

Logout

Logout: To log out of the application, select **Logout** and then select **CONTINUE**.

> **Warning:** Pending changes are lost if you log out without updating Community Development. Be sure to upload changes before you log out.

Customize Menu Order

You can change the order of the menu options in the inspection menu and case menu that appear on the right when you select an inspection or case. This feature enables you to have your most used functions at the top of the menu.

To change the order:

1. In the application footer, select **Profile**.
2. Select **Customize Menu Order**.
3. Use the tabs at the top of the page to choose inspection menu or case menu.
4. Drag menu items to change the order.
5. Select **SAVE**. Be sure to save before you go to a different tab.
6. After you complete all changes you want to make on both tabs, select ← to return to the profile page.

Inspection Filter Options

By default, current and overdue inspections and cases appear on the home page. Using the inspection filter options, you can choose to include all open inspections (overdue, current, and future) or inspections from a specific date range.

To view all your inspections that are overdue, due today, or in the future, turn on the **Get all open Inspections** option . Select **SAVE**.

To view inspections within a specific date range only, enter a start date and an end date. Select **SAVE**.

Security

CentralSquare Mobiles employs 256-bit Advanced Encryption Standard (AES) encryption to prevent access by unauthorized users. This feature protects your data if your device is lost or stolen.

If you want to use Active Directory, refer to detailed setup information in the Community Development WUM guide.

Release notes and version history

2.0.11

Dec. 5, 2025

Fixed issue related to inspection and cases tabs, and resolved time out issues.

2.0.10

Jun. 5, 2025

Fixed issue where attachments stopped getting uploaded.

2.0.9

Jun. 3, 2025

- Syncing:
  - Improved performance for attachments. Added support for larger file sizes for both uploads and downloads. *Requires Community Development update.
  - After syncing, if any items failed to sync, a message appears. Failed changes are still discarded.
- Violations:
  - Now supports standard notes.
  - Status now defaults to NONCOMPLIANCE, if such a status exists. Statuses must still be set in order to sync.
  - Location is now optional. *Community Development 19.5.14/24.1.2 and earlier still require Location in order to sync.
- Other:

    - Changed logo on login page.
    - Fixed white screen issue.
    - Switching between different tabs in the same record no longer clears unsaved changes.
    - Fixed checklist issues in dark mode.
    - Restrictions can now be cleared and saved without requiring changes to the form.

2.08

Apr. 9, 2025

- Map button will now deselect inspections/cases
- Violations will now use NONCOMPLIANCE status by default if that status exists
- Hide map instead of remove when selecting inspection. On deselect map reloads immediately.
- Changed left menu so it is always customizable.

2.0.7

Mar. 7, 2025

Fixed issue where resulted inspections do not always disappear from list after update to Community Development.

2.0.6

Feb. 28, 2025

- Fixes for inspection schedule date and time. Changed time selection from multi spin wheel to picker. Added support for AM/PM.
- Inspection result page no longer requires the result to be queued for update. Added empty result to un-result an inspection.

- Fixes for syncing issues and profile settings.
- Attachments now download when you log in and new attachments now upload along with all other data after you select Update. Attachments that have not been uploaded to Community Development can be deleted and renamed.

2.0.5

Oct. 23, 2024

Support Request Fixes. Contact CentralSquare Support to determine if your issue was resolved in this build.

2.0.4

Feb. 27, 2024

Added support for more attachment types. Able to open many more file types including Microsoft Word and Excel documents.

2.0.3

Jun. 5, 2023

Optimizations and domain fixes.

2.0.2

Apr. 13, 2023

Better result pages and improved quality of attachments.

2.0.1

Feb. 2, 2023

CentralSquare - Community Developments new mobile application

2.0.0

Jan. 23, 2023

New Community Development Mobiles Product

Glossary

A

API

application programming interface

C

Community Development

CentralSquare software application that enhances local government operations by automating permitting, managing inspections, regulating land use, and tracking projects, while providing visibility into status updates and allowing payment processing.

P

pinch

place two fingers on the touchscreen and then move them closer together or farther apart

R

REST

representational state transfer

restrictions

important information (such as whether a property is in a flood zone, on a fault line, or in a historical district) that can affect requirements for fees, inspections, or other activities

result an inspection

assign a status (result) to the inspection and add details about the inspection

U

UDF

user-defined field

W

WUM

Web Utilities & Maintenance