Contents Capture Admin Guide

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

Open the admin console | Download PDF guide | Get the iOS app

Organizations and teams

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

Capture profiles

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

Assignments at scale

Live mission control

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

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

Locked submissions

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

Workflows and webhooks

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

What this guide covers

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

A typical rollout

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

Where is the field app guide?

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

Sign in and access

Anyone your organization has added can sign in to the Contents Capture admin console, and what you see after signing in depends entirely on your role.

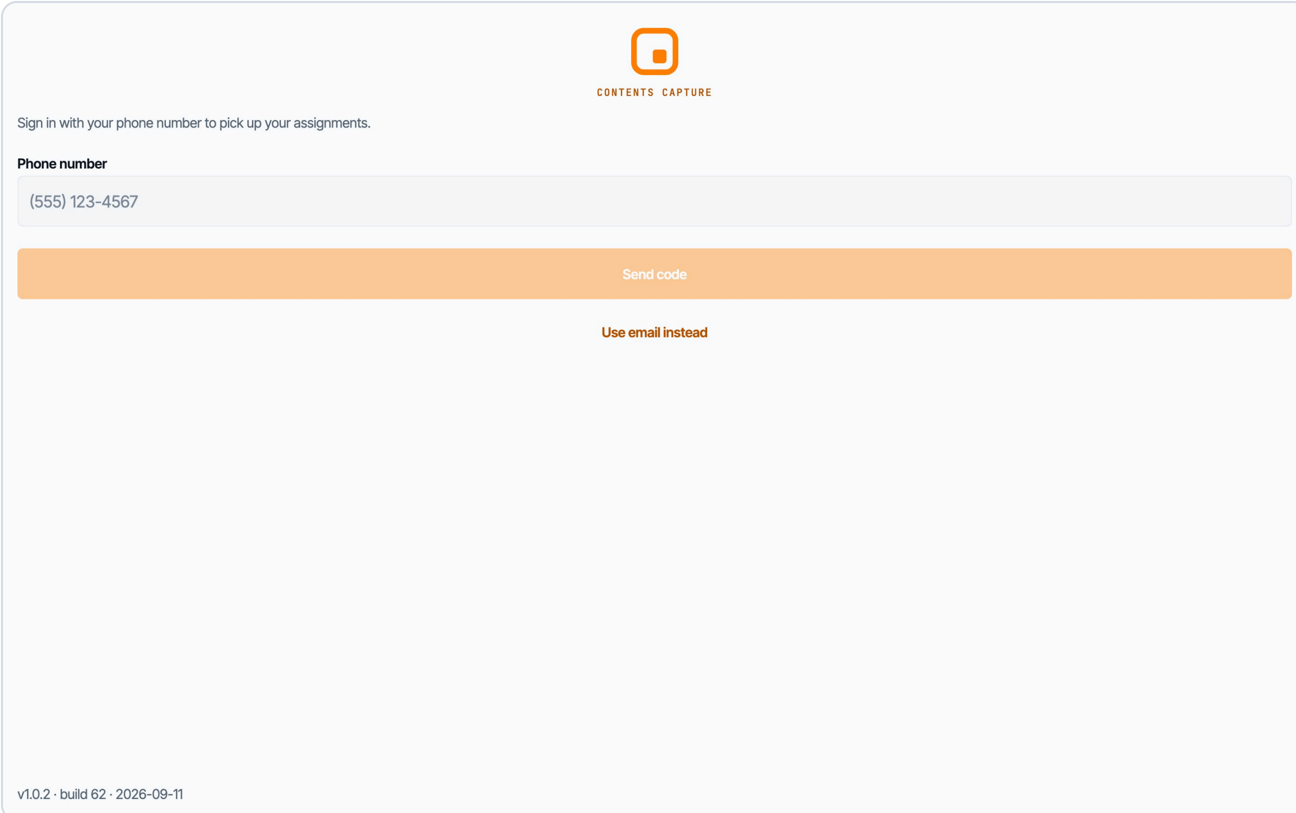
Who can access

You can sign in if an admin in your organization has added you on the **Users** page. You do not need a separate password or account setup: sign-in uses a one-time code sent to your email or phone, so there is nothing to remember or reset.

Your role decides what you see. Org admins see everything including Mission Control, webhooks, and integrations. Members and observers see the console but with most management features unavailable. See **Roles and permissions** for the full breakdown.

Signing in

1. Go to https://app.contentscapture.com.
2. Enter your **email address** or **phone number**, the same one your admin used when adding you.
3. Check your inbox or text messages for the **one-time code**.
4. Enter the code. You are signed in.



No password to lose

Because sign-in uses a one-time code every time, there is no password to forget, share, or reset. If a code does not arrive, check spam folders or ask your admin to confirm the email or phone number on file.

Switching organizations

If you belong to more than one organization, use the **organization switcher** in the top bar, next to the Contents Capture brand mark. Click it to see every org you belong to and switch between them. Your role can differ per org: you might be an org admin in one and a member in another.

The "Database" pill in the footer

The small **Database** pill in the footer shows which tenant database your session reads. It exists as a support diagnostic. You can safely ignore it in day-to-day work; if you ever contact support, they may ask what it says.

Console versus the mobile app

The same account signs you into both the admin console and the iOS field app, but they serve different jobs:

- **Admin console** (app.contentscapture.com) is where configuration happens: organizations, users, profiles, assignments, workflows, and review.
- **iOS app** is where field staff capture media and submit hand-offs. Field staff should use the Field Guide for app training.

Finding your way around

The left navigation is grouped into five sections:

Group	Contains
Field	Mission Control, Assignments, Crews
People	Users, Roles
Content	Submissions
Automation	Workflows, Runs, Templates
System	Webhooks, Integrations, Audit log, Settings

Click the rail toggle to collapse the navigation into an icon-only rail when you need more screen space. The console remembers your preference. A **Documentation** link in the nav footer brings you back to this guide.

Roles and permissions

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

The six roles

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

The 13 permissions

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

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

Who can assign which role

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

The Roles page

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

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

Custom roles cannot be created

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

Org membership versus assignment access

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

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

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

Structure and terminology

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

The hierarchy

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

A realistic insurance example:

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

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

Creating organizations

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

1. Go to **Settings** and find the **Organizations** card.

2. Click **New organization**.
3. Enter a name and confirm.

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

Per organization you can:

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

Deleting an organization hides it, it does not erase it

Deleting an organization removes it from your console, but its data is retained and can be restored by support. If you delete one by accident, contact support to have it restored.

The Crews page

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

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

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

Deleting a business unit is permanent

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

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

The New Business Unit wizard

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

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

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

Team detail

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

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

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

Deleting a team removes its work structure

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

Terminology

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

- Business unit (singular and plural)
- Team (singular and plural)
- Assignment (singular and plural)
- Location / room (singular and plural)

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

This guide uses default names

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

When to split business units versus teams

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

- **Split by business unit when the groups operate independently.** Different regions, different lines of business (residential vs commercial), or different carrier contracts with their own admins are good candidates. Each business unit can have its own admin who manages everything beneath it.
- **Split by team when the groups share oversight but work different losses.** Crews within a region, day and night shifts, or per-event rosters on a catastrophe response are usually teams.

- **Prefer fewer layers.** If your whole company is one flat roster, a single business unit with a handful of teams is simpler to run than a deep tree.
- **Use assignments, not teams, for individual losses.** A team is a durable group of people; an assignment is a unit of work. Create assignments freely and archive them when done.

Users and invitations

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

The Users page tour

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

The directory table shows one row per person:

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

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

Adding a user

1. Click **Add user**.
2. Enter the **Full name**. This is used for their sign-in identity and app install invitation.

3. Enter an **Email** address, a **Phone** number, or both. Email is required for iOS install invitations. Phone must be in E.164 format: a plus sign, the country code, then the number with no spaces or punctuation, for example `+14155550123`.
4. Choose a **Role**. Restricted roles are disabled in the dropdown with an explanation (for example, only org admins can assign the org admin role).

When you save, three things happen behind the scenes:

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

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

Validation rule

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

Editing users and changing roles

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

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

Deactivating a user

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

What deactivation does

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

The user activity drawer

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

Pending users

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

Assignment-level invitations

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

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

4. Send the invitation.

Invitations move through four statuses:

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

No resend button

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

Team Members tab

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

To add someone:

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

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

Best practices

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

Capture profiles

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

What a capture profile is

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

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

Lifecycle: draft, published, archived

Every profile has a status badge:

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

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

Published profiles are locked on purpose

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

Creating a profile

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

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

Entities

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

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

Scope, with examples

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

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

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

The 15 field types

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

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

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

Field app only

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

Field options

Per field you can set:

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

Conditional visibility

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

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

Reference templates

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

How profiles attach to assignments

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

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

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

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

Validation on save and publish

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

Capture settings

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

Where capture settings live

Capture settings exist at two levels:

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

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

Snapshot semantics

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

In practice:

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

Every option, with defaults

Timestamping

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

GPS metadata

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

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

Require proxy

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

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

Watermark

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

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

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

Burned-in watermarks and clean originals

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

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

You never lose the unmarked evidence by turning watermarks on.

Guidance

When to enable watermarks:

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

When to leave them off:

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

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

Assignments

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

The assignments explorer

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

Status filter chips

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

Status	Meaning
Draft	Created but not yet put into the field.
Active	Being worked. Captures are arriving.
In review	Field work is done; office review is underway.
Submitted	Set automatically when every media item on the assignment belongs to a submission. Reverts to active automatically if new media arrives.
Completed	Reviewed and closed.
Archived	Retired from day-to-day lists.

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

Views bar

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

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

Views can be renamed and deleted from the same bar.

Search and filters

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

Column manager

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

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

Pagination

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

Row actions

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

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

What deleting an assignment does

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

Creating assignments with the wizard

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

Step 1: Method

Choose how to create:

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

Step 2: Team and members

- **Team**: pick the team the assignment belongs to. Its members will see the assignment in the field app.
- **Profile**: pick a capture profile. Only **published** profiles appear, because assignments snapshot the profile's schema at creation. See **Capture profiles**.

- **Members**: every team member is listed and checked by default. Checked members get collaborator access to the assignment. At least one checked member must be a **team lead** (a team admin), so the assignment always has someone responsible for it. You can add an existing user as a team lead, or **invite by email**: the invitee joins as a team admin.

Step 3: Details

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

Step 4: Review

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

Step 5: Create

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

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

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

Bulk import from Settings

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

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

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

Mobile-created assignments

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

Assignment detail

The assignment detail page is the control center for a single loss: its status, rooms, people, media, settings, and history, all in one place.

Header

The header shows the assignment **name**, its **status badge**, and "Reference {ref}" when a claim reference is set. From the header you can:

- Change the **status** with the dropdown.
- **Edit** the name and reference.
- **Delete** the assignment.

> **Deleting from the detail page removes captured media**
>
> The delete confirmation here asks whether to delete the assignment "and all of its captured media" and warns "This can't be undone." Unlike the list-page delete, which retains captured evidence in storage, this path can remove the media too. Read the confirmation text carefully before proceeding.

Tab by tab

Overview

Three cards summarize the assignment:

- **Status card**: current status, "Profile version v{n}" (the snapshot version of the capture profile this assignment was created from), and the on/off state of **Timestamping**, **GPS**, and **Watermark** as captured in the assignment's settings snapshot.
- **Summary card**: counts of people, groups, and media, plus a breakdown of media by sync state (captured, uploading, synced, and so on). See **Sync states.**

- **Loss information card**: the values of the profile's assignment-scoped fields, taken from the snapshot. With the assignment.manage permission you can edit values inline; saving shows "Loss information saved, logged to audit" because every edit is recorded in the audit log.

Rooms

The Rooms tab (named after your terminology for locations) lists every room or location on the assignment in a table:

Column	Meaning
Order	Display order in the field app.
Name	Room name, for example "Kitchen".
Media count	How many items are linked to the room.
Assigned to	The person the room is assigned to.
Notes	Free-text notes.

You can create and edit rooms (name, order, assignee, notes) and reorder them. Room editing requires the location.write permission.

Two behaviors worth knowing:

- **"Assigned to" is advisory.** It tells field staff who should cover the room, but it does not gate capture: anyone with access can capture into any room.
- **Deleting a room is a soft delete.** The confirmation notes that its media keep their room link and stay retrievable, so deleting a room never orphans its photos.

Access

The Access tab shows who can reach this assignment:

- **Team members**: a read-only list of the owning team's roster.
- **Assigned team members**: members with active grants on this assignment.
- **Invitations**: invite outsiders as collaborators or observers, and manage pending, accepted, revoked, and expired invitations.

Invitations are covered in detail in **Assignment-level invitations.**

People

The People tab folds together everyone with access and their capture activity:

Column	Meaning
User	Name, with presence dots showing who is currently active.
Role/access	Their role, plus "via" badges showing how they got access (team membership, invitation).
Items	How many media items they have captured on this assignment.
Last active	When they last did something on this assignment.
Device	The device model they are using.
Last connected	When their device last synced.

People who were invited but have never been active show "Invited {ago}" instead of activity stats, which makes it easy to chase down collaborators who have not started. The tab polls every 30 seconds, so presence and counts stay fresh during active field work.

Audit

An assignment-scoped view of the audit log: every action taken on this assignment, by whom, and when. See **Audit log** for how to read entries and the detail dialog.

Settings

Two sections:

- **Assignment info**: edit the name and reference.
- **Capture settings**: the full capture settings editor for this assignment. See **Capture settings**.

Assignment settings are a snapshot

The tab reminds you: this assignment snapshots its capture settings at creation, and editing here never mutates other assignments or the team defaults. Changes apply to this assignment going forward only.

Media

The Media tab is the full media browser for the assignment: grid, filters, bulk tagging, lightbox review, and per-item metadata. It is covered in **Submissions and media**.

Submissions and media

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

What a submission is

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

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

The Submissions page

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

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

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

Review philosophy

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

The suggested review flow:

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

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

The media browser

Open an assignment and go to the **Media** tab. The browser is an infinite-scroll grid of thumbnails that loads more items as you scroll, using fast proxy copies so even large assignments stay snappy.

Filters

Open the filters popover to narrow the grid:

- **Search notes and tags**: free text, matched against item notes and tags.
- **Type**: photo, video, or audio.
- **Sync state**: captured, processing, queued, uploading, synced, or failed. See **Sync states**.
- **Capturer**: who captured the item.
- **Groups**: filter by group, including **Ungrouped** for items not in any group.

- **Tags**: facet chips with counts, so you can see at a glance that, say, 34 items are tagged "damage" and click to show only those.

Select mode and bulk actions

Enter selection mode to check multiple items, then:

- **Tag**: bulk add or remove tags across all selected items. Use tags to mark review outcomes ("reviewed", "needs-recapture", carrier-specific codes) since there are no approval buttons.
- **Delete**: delete the selected items. Requires the media.delete permission.

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

The lightbox

Click any item to open the full-screen lightbox:

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

The metadata sidebar

The lightbox sidebar carries everything known about the item:

- Type and sync-state badge

- **Captured**: the timestamp
- **By**: the capturer
- **Duration** (video and audio), **Dimensions** (photos and video), **Original size**
- **Device**: model that captured it
- **Watermark**: "Burned in" state
- **GPS**: a "lat, lng" link that opens the capture location in a map
- **Download original**: downloads the clean master file
- **Tags and Notes**: editable, with **Save changes**
- **Activity**: a per-item timeline of everything that happened to this item

---

Downloading media

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

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

Sync states

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

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

Dashboards and Mission Control

Two live views keep you on top of field work: the Overview page for a daily pulse, and Mission Control for real-time operational awareness.

Overview page

The Overview page is the console home (the `/` route), titled with your organization name and "Signed in as {your roles}".

Stat cards

Four cards summarize the last 24 hours:

Card	Shows
Items captured (24h)	Total captures, plus the org pace per hour.
Active adjusters (24h)	How many people captured, plus how many assignments are in progress.
Submissions	The most recent hand-offs.
Teams	Team count, plus how many business units they sit in.

Header actions jump straight to **Mission Control** or to **Manage teams**.

Activity cards

- **Top capturers (24h)**: the five most productive adjusters by media count, each showing "last capture {ago}". Click one to open their adjuster activity drawer.
- **Latest submissions**: the five most recent submissions ("#seq by {name}", item counts), with a "View all" link to the Submissions page.

Org-wide activity is org-admin only

The Top capturers card shows org-wide activity, which only org admins can see. Other roles see the note "Org-wide activity is visible to org admins." in its place.

Mission Control

Open **Field → Mission Control** (route `/live`) for the real-time operations view. Mission Control is for org admins only; other roles see "Mission Control is for org admins".

The page polls every 10 seconds and shows a "Live · updated {ago}" pulse so you always know the data is fresh.

Time window

The window selector controls how far back the view looks: **30m, 2h, 4h, 24h, 7d, 14d, 21d, or 30d**. The default is **4 hours**. Widen the window for catastrophe responses spanning days; narrow it for shift-level monitoring.

Stat cards

Card	Shows
Items captured	Total in the window, broken down as photos, videos, and audio.
Active adjusters	How many are capturing, plus how many appear on the map.
Assignments in progress	Assignments with activity in the window.
Org pace	Captures per hour across the org.

The field map

The field map plots one colored marker per adjuster, with GPS trails showing where they have been capturing. The header reads "Field map ({n} located)".

- **Fullscreen** expands the map with a sidebar listing every located adjuster.
- **Click a marker** to open that adjuster's activity drawer.
- Empty hint: "GPS appears when captures carry location metadata." If the map is empty, field devices have not granted location permission or GPS metadata is disabled in **capture settings**.

On very busy windows the map truncates with the warning "Showing the most recent 5,000 captures in this window", which keeps the view responsive during large catastrophe responses.

Per-adjuster cards

Below the map, one card per active adjuster shows:

- **Active / Idle badge**: an adjuster is idle when their last capture is older than 10 minutes (or older than one fifth of the window on longer windows). Idle does not mean off duty; it means no captures recently.
- **Items and sparkline**: capture count and rhythm across the window.
- **Pace**: captures per hour.
- **Avg gap** and **Median gap**: typical time between captures. Long gaps on an active assignment are worth a phone call.
- **Mix**: the photo/video/audio split, for example "Mix 45p 3v 2a".
- **Top assignment**: the assignment they have captured most on, linked.
- **On map / No GPS**: whether their captures carry location.

The adjuster activity drawer

Click any adjuster (from a card, the map, or the Overview page) to open the activity drawer:

- Identity plus Active/Idle status, and "Last seen {ago} in {room} on {assignment}".
- Window stats: items, pace, average and median gap, a sparkline, and per-assignment capture counts.
- **Recent captures gallery**: their latest items with type badges and "Submitted" markers, with a grid/table toggle. Click any item for the full lightbox.
- **Submissions**: their hand-offs in the window.

Practical uses

- **Verify crew coverage on a catastrophe response.** Open the map in fullscreen during a CAT deployment to confirm every neighborhood has a marker and no zone is unstaffed.
- **Spot idle adjusters.** Sort attention by the Active/Idle badges. An idle badge on someone who should be mid-inspection usually means a dead phone battery, a connectivity problem, or a finished job they have not reported.
- **Confirm GPS is flowing.** If "No GPS" appears across many adjusters, location permission is likely being denied on devices. Coach field staff to grant it, or check the GPS metadata setting on the team.
- **Pace checks before deadlines.** The org pace card tells you whether the current capture rate will clear the queue before a carrier deadline.

Workflows

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

What workflows are

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

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

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

The Workflows list

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

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

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

Header actions:

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

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

Creating a workflow

The creation wizard walks through five steps:

1. **Template**: start blank or pick a preset.
2. **Basics**: name and describe the workflow.
3. **Scope**: decide whether it applies org-wide, to one team, or to assignments built from one profile.
4. **Trigger**: pick the event that starts the workflow, for example `submission.created`.
5. **Review**: confirm, then open the builder to add conditions and actions.

The builder in plain terms

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

The trigger node

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

Condition branches

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

Action nodes

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

Recipients

Email and SMS steps offer four recipient choices:

- **The actor**: the person who triggered the event, for example the adjuster who submitted.
- **Team admins**: the admins of the relevant team.
- **Assigned crew members**: everyone assigned to the assignment.

- **Custom address**: a specific email address or phone number you type in, such as a shared claims inbox.

Testing before enabling

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

Validation

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

Runs

The **Runs** pages show every execution:

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

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

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

Good first workflows

- **Submission SMS to team admins** (`submission.created`): the classic. The desk knows instantly when field work lands.
- **Status-change email to the claims inbox** (`assignment.status_changed`): keeps the claim file current without manual email.
- **Failure alert** (`media.upload_failed`): notify team admins when uploads fail so connectivity problems get fixed before evidence sits on a device.
- **Webhook to your claim system** (`media.uploaded` or `submission.created`): keep your system of record in sync automatically.

Message templates

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

What templates are

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

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

Creating a template

1. Click **New template**.
2. Enter a **Name**, for example "Submission alert SMS".
3. Pick the **Channel**: Email or SMS.
4. For email, enter a **Subject**. Subjects support `{{ variable }}` interpolation too.
5. Write the **Body** as plain text, using `{{variable}}` placeholders for dynamic data.
6. Save.

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

Editing and version history

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

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

SMS rules

SMS templates are validated strictly:

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

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

Using templates in workflows

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

- The wording is maintained in one place, even if many workflows send it.
- Editing the template updates every workflow that uses it, with no workflow edits needed.
- Version history gives you an audit trail of exactly what message was in force at any time.

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

Managing the list

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

Webhooks

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

Who this page is for

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

Endpoints

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

Creating an endpoint

1. Click to create an endpoint.
2. Enter the **Endpoint URL**, the address of your receiving system.
3. Choose subscriptions: either **Subscribe to all events (*)** or check individual event types from the list. The full catalog is in Reference → Event types.
4. Save.

Copy the signing secret immediately

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

Managing endpoints

Per endpoint you can:

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

The payload and signature

Every delivery is a POST with a JSON body containing:

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

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

Event types

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

Recent deliveries

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

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

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

Incoming webhooks

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

Good practices

- **Respond fast.** Your endpoint should return a 2xx response quickly and do heavy processing asynchronously. Slow responses look like failures and trigger retries.
- **Always verify the signature.** Check X-CC-Signature against your signing secret before acting on any payload.
- **Use the idempotency key.** Retries and replays can deliver the same event more than once. Store processed idempotency keys and skip duplicates so a retried delivery never creates duplicate records on your side.

- **Watch the deliveries feed after changes.** Any time you edit an endpoint URL or your receiving code deploys, check Recent deliveries for a spike in failures.

Integration tokens

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

What integration tokens are

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

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

Creating a token

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

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

Scope

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

The tokens table

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

Revoking a token

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

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

Security guidance

- **Store tokens in a secrets manager**, not in email, spreadsheets, or chat messages.
- **Rotate regularly.** Create a new token, give it to the partner, confirm their switch-over, then revoke the old one.

- **Revoke unused tokens.** Check the Last used column quarterly; anything idle for months should go.
- **One token per partner.** Never share a token between two apps. Separate tokens let you revoke one partner without disturbing another, and the audit trail shows which token made which request.
- **Treat a leaked token like a leaked password.** If a token may have been exposed, revoke it immediately and issue a replacement.

Audit log

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

What the audit log records

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

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

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

Who can see it

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

Using the page

Open **System → Audit log**.

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

The event detail dialog

Click any row to open the detail dialog:

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

Assignment-scoped audit

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

Impersonation

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

Use cases

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

Organization settings

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

Find it at **System → Settings**.

Organizations card

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

Mobile app card

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

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

Terminology card

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

Assignment visibility card

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

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

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

Key behaviors:

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

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

Import assignments from spreadsheets

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

Capture settings by team

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

System integrations

Platform-level email and SMS delivery settings:

- **Mailgun**: API key (write-only, never displayed back), domain, from address, and a **test email** button.

- **Twilio**: Account SID, auth token (write-only), from number in E.164 format, and a **test SMS** button.

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

Platform-level settings

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

What is not here

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

Field types

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

All 15 types

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

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

Options reference

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

Notes

- **file, media_ref, and signature are field-app only.** They are captured in the iOS app and appear read-only in the console. You can view their values but not edit them.

- **Keys are auto-generated.** When you type a label like "Loss Information", the key becomes `loss_information` automatically (snake_case: lowercase words joined by underscores). Keys are the stable identifiers used in event data and webhooks.
- **There are no per-assignment photo-count minimums.** If a carrier requires a minimum number of photos per room, enforce it through review practice rather than profile configuration.

Event types

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

Assignments

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

Users

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

Invitations

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

Access

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

Locations (rooms)

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

Groups

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

People

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

Media

Event	Fires when	Typical automation use
`media.captured`	A photo, video, or audio clip is captured on a device.	Real-time capture notifications.
`media.uploaded`	A media item finishes uploading to the server.	Trigger external processing or backups.
`media.upload_failed`	An upload fails.	Alert team admins to connectivity problems.
`media.updated`	Media metadata (tags, notes) changes.	Sync tags to external review tools.
`media.deleted`	A media item is soft-deleted.	Record deletions for compliance.

Submissions

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

Profiles

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

Webhooks and integrations

Event	Fires when	Typical automation use
`webhook.endpoint.created`	A webhook endpoint is added.	Security monitoring of integration changes.
`webhook.delivery.failed`	A webhook delivery fails.	Page the integrations owner when deliveries break.
`integration.token.created`	An integration token is issued.	Log credential issuance for audit.
`integration.token.revoked`	An integration token is revoked.	Confirm credential retirement.

Same events, two consumers

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

FAQ

Straight answers to the questions admins ask most.

A user cannot sign in. What do I check?

Work through this list in order:

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

Someone left the company. What do I do?

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

An invitation says pending forever. Now what?

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

Can I change a published profile?

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

If I edit capture settings, do old assignments change?

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

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

It depends on the sync state when it was deleted:

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

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

Can I export all media for an assignment at once?

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

How do I give a contractor temporary access?

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

Can we rename "Teams" to "Crews"?

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

Who can see the audit log?

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

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

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

See **Webhooks**.

Can field staff create assignments from the app?

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

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

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

Details: Assignments, Structure and terminology.

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

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

Can I create a custom role?

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

Glossary

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

Structure

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

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

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

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

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

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

Roles

Org admin The top role: everything in the console, including webhooks, integrations, and Mission Control.

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

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

Work

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

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

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

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

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

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

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

Capture

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

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

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

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

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

Operations

Mission Control The org-admin live operations view: a real-time feed, field map with GPS trails, and per-adjuster productivity stats. See **Dashboards and Mission Control**.

Automation

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

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

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

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

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

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

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

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

System

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

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

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

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