To access the Routing Page:

➢ Log in to INSPI2
➢ Click on the Communications page
➢ Click on Routing on the Left Menu

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Safeguard Properties' Information Security Policies include very specific guidelines concerning the safeguarding of confidential information, which includes customer information. In general, these guidelines limit employee and contractor access to confidential information, and limit the use and disclosure of such information to specifically authorized processes and transactions. Please follow this link to read these policies.
Safeguard Properties Information Security Policies

Safeguard is committed to ensuring client data is secure and that any confidential data is treated as such by employees and vendors. Safeguard utilizes a rigorous system of controls and process to protect client data. A description of this system is available to authorized recipients upon request.

Welcome Tester12 123
You are using the Tester system.

Order Summary

	Total
All Orders:	97
Open Orders:	16

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Message Summary View

Double click on any row to view message detail.

	Status	Message Subject	Message Preview	Type
1	✉	New Open Orders	You have new open or ...	Flash
2	✉	New Open Orders	You have new open or ...	Flash
3	✉	New Open Orders	You have new open or ...	Flash
4	✉	New Open Orders	You have new open or ...	Flash
5	✉	Order Routing	There is 1 order tha ...	Flash
6	✉	New Open Orders	You have new open or ...	Flash
7	✉	Order Routing	There is 1 order tha ...	Flash
8	✉	New Open Orders	You have new open or ...	Flash

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Memos
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Logout (Tester12)

Routing Page Workspace:

➢ Use check boxes to select orders to work with
➢ Work Order Filters (see blue arrow) allow user to filter orders by any of the columns
➢ Action Buttons (see purple arrow) allow user to perform the following actions:

- Group/Move – Group work orders for easier manipulation
- Add Seq – Add a sequence to all selected (checked) work orders
  - Only sequenced orders are exported via Create PDF & Create Excel File Data Export Options
- Remove Seq – Remove sequence from all selected work orders
- Clear All Seq – Remove sequence from all work orders (whether selected or not)
- Reset – Remove all highlight colors from grid

➢ Data Export Options
- Create PDF File
  - Export sequenced work orders to PDF file format
- Create Excel File
  - Export sequenced work orders to Excel file format
- Create Standalone Excel File
  - Export ALL work orders to Excel file format

Using the Routing Page:

Grouping Data:

1. Select the orders that require grouping with the check box on the left hand side:

2. Select Group/Move in the lower left hand corner of the routing page:

3. Your orders will now be grouped together AND color coded according to the setup you created.

How Do I Create a Standalone Excel File:

1. Press the Create Standalone Excel File option and either Open or Save the document.

How Do I Create an Excel or PDF File:

1. Follow the instructions to group data or select a range to be sequenced

2. Select the orders to be sequenced and choose the Add Seq button

3. Verify your grouped orders are sequenced by number:

4. Press the Create Excel (Or Create PDF) File option

5. Either open or save your new Excel (Or PDF) file.

NOTE 1: To remove sequenced orders, simply check the orders you'd like to have removed and press the Remove Seq. button:

Routing of orders

		Client Code	Workorder	Address	City	State	Zip	Map Code	Sequence
	☐	All ▾				All ▾			
1	☐	SUNT	600001726	1234 SAFEGUARD ST	MEDINA	OH	44256		1
2	☐	PNC	600001292	321 HAPPY TRAILS	CLEVELAND	OH	44125		2
3	☑	PNC	600001293	321 HAPPY TRAILS	CLEVELAND	OH	44125		3
4	☑	SUNT	600001727	1234 SAFEGUARD ST	MEDINA	OH	44256		4
5	☑	SUNT	600001954	4257 TESTFTV ST	CLEVELAND	OH	44131		5
6	☐	FUN	600001027	123 HAPPY TRAILS	CLEVELAND	OH	44125		

Create PDF F

Routing of orders

		Client Code	Workorder	Address	City	State	Zip	Map Code	Sequence	Due
	☐	All ▾				All ▾				
1	☐	SUNT	600001726	1234 SAFEGUARD ST	MEDINA	OH	44256		1	07/10
2	☐	PNC	600001292	321 HAPPY TRAILS	CLEVELAND	OH	44125		2	05/21
3	☐	SSMC	600001010	86578 HAPPY TRAILS	CLEVELAND	OH	44125			03/27
4	☐	FUN	600001027	123 HAPPY TRAILS	CLEVELAND	OH	44125			04/03

Note 2: To remove ALL sequenced orders, select the Remove Seq. Button at the bottom of the page:

15	☐	SUNT	600002247	82514 TEST ST	CLEVELAND	OH	44131	08/25/2014	
16	☐	SUNT	600002301	3256 FENMOR ELN		OH	44202	09/02/2014	

↻ ⇕ Group/Move ＋ Add Seq. ― Remove Seq. ⊘ Clear All Seq. ◈ Mapcode ▣ Reset

How can I reorder the labels on the system?

1. Simply drag the label to the location you would like to the desired area

Create PDF File | Create Excel File | Create Standalone Exc

Routing of orders

		Client Code	Workorder	Address	City	State	Zip	Work code	Code	Sequence	Due Date	25/35	Loan ID
	☐	All ▾				All ▾					All ▾		
1	☐	SUNT	600001726	1234 SAFEGUARD ST	MEDINA	OH	44256			1	07/10/2014 FINT	N	9431705
2	☐	PNC	600001292	321 HAPPY TRAILS	CLEVELAND	OH	44125			2	05/21/2014 FINT	N	9430961
3	☐	SSMC	600001010	86578 HAPPY TRAILS	CLEVELAND	OH	44125				03/27/2018 DF	N	9431181
4	☐	FUN	600001027	123 HAPPY TRAILS	CLEVELAND	OH	44125				04/03/2014 FI	Y	9430958
5	☐	PNC	600001293	321 HAPPY TRAILS	CLEVELAND	OH	44125				05/16/2014 FINT	N	9430961

How can I narrow my results?

1. You can type partial answers into the blank fields above the work order information:

Routing of orders

		Client Code	Workorder	Address	City	State	Zip	Due Date	Map Code	Sequence	25/35	Loan ID	Work code
	☐	All ▾				All ▾					All ▾		All ▾
3	☐	SSMC	600001010	86578 HAPPY TRAILS	CLEVELAND	OH	44125	03/27/2018			N	9431181	DF
4	☐	FUN	600001027	123 HAPPY TRAILS	CLEVELAND	OH	44125	04/03/2014			Y	9430958	FI

a. For example, if you want all orders that begin with "123" in the address, type "123" in the blank address field. This will populate only orders that begin with "123":

		Client Code	Workorder	Address	City	State	Zip	Due Date	Map C
		All		123		All			
1	☐	SUNT	600001726	1234 SAFEGUARD ST	MEDINA	OH	44256	07/10/2014	
2	☐	FUN	600001027	123 HAPPY TRAILS	CLEVELAND	OH	44125	04/03/2014	
3	☐	SUNT	600001708	1234 SAFEGUARD ST	MEDINA	OH	44256	07/10/2014	
4	☐	SUNT	600001727	1234 SAFEGUARD ST	MEDINA	OH	44256	07/10/2014	
5	☐	SUNT	600001725	1234 SAFEGUARD ST	MEDINA	OH	44256	07/10/2014	

How Do I add Map Codes?

1. Create a sequence in the routing page
2. Check mark the work orders to be mapped
3. Select Mapcode from the bottom of the page
4. Enter up to 8 alpha numeric characters and select OK

CLEVELAND   OH   44125   A32

Map Code ✖

Enter new code for 1 selected row: 1a2b3c4d

[You can enter from 0 to 8 symbols]

Ok   Cancel

CLEVELAND   OH   44131