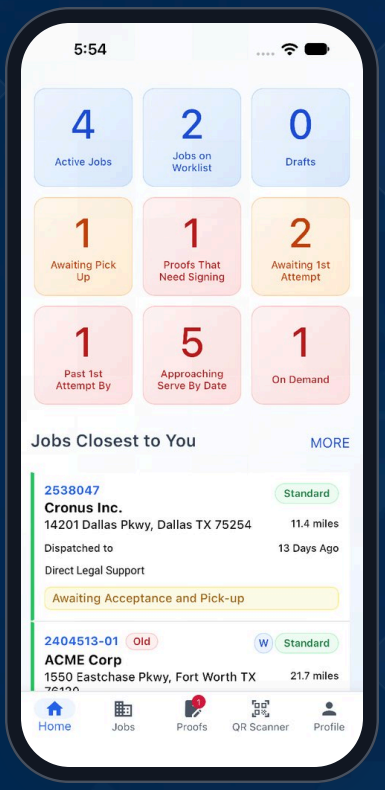
DIRECT® LEGAL SUPPORT

SDXPRO MOBILE APP

User Guide

Everything you need to work your **Direct Legal Support** jobs in SDXPro, from signing in to signing your proofs.



Download the app

SDXPro is free for iPhone and Android. Scan a code with your phone's camera or tap a badge.

iPhone

Download on the App Store

Android

GET IT ON Google Play

Your day in SDXPro

1 Plan

Look over your jobs and build your work list.

2 Record

Document each visit: photos, status, time, location, person and comments.

3 Check

Make sure attempts were submitted, clear anything waiting to send, and sign your proofs.

NEED HELP?
Call or email Direct Legal Support.

(800) 675-5376

support@directlegal.com

About this guide

SDXPro helps you organize your Direct Legal Support jobs, record each attempt, check your service records and sign your proofs. This guide covers the whole app in eight sections and ends with examples of the California AB 747 photo checks. The screens are from an iPhone; Android works the same way. What you see depends on your account and the job, so always read a job's instructions before you record an attempt.

Contents

01 Getting Started 3
- Download the app 3
- Sign in 3
- Create a password account 4
- Finish first-time setup 4
- Get your phone ready for field work 5

02 Finding Your Way Around 6
- How the app is organized 6
- Use the Home dashboard 7

03 Managing Your Jobs 8
- Find and search for jobs 8
- Build your work list 9
- Sort jobs and plan your route 9
- Open a job with the QR scanner 10

04 Working a Job 11
- Look over a new job 11
- Accept a job 12
- Decline a job 12
- The General tab 13
- The Instructions tab 13
- View job documents 14
- Choose or add an address 14

05 Recording an Attempt 16
- Start an attempt with photos 16
- Manage photos and their categories 17
- Complete AB 747 exceptions 17
- Choose the status 19
- Check the date and time 19
- Confirm the location 20
- Record the person engaged or served 20
- Add the comment and complete the attempt 21

06 After the Attempt 22
- Save a draft and finish it later 22
- Pending and failed attempts 22
- Review or update a submitted attempt 23
- Apply an attempt to grouped jobs 24
- Job comments and charges 24
- Review and sign a proof 25
- Before you finish for the day 26

07 Your Profile 27
- Keep your profile up to date 27

08 Help and Troubleshooting 28
- Get help 28
- Troubleshooting 28

A Examples: AB 747 Photos and More 29
- A. California: Door photo with GPS 29
- B. California: photo without GPS 30
- C. California: photo not tagged Door 30
- D. California: no photos 31
- E. Job outside California 31
- F. Photo order and the attempt time 31
- G. Served and authorized person 32

01 Getting Started

Download SDXPro, sign in and get your phone ready for the field.

Download the app

SDXPro is free for iPhone and Android. Download it from the App Store or Google Play. The codes on the cover of this guide take you straight there.

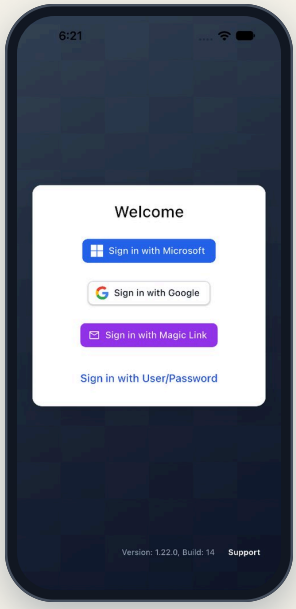
Download on the App Store GET IT ON Google Play

Sign in

> Sign in with the email address **Direct Legal Support** has for you. That's how the app finds your jobs.

Open SDXPro to the **Welcome** screen. The first time, pick one of four ways to sign in:

- **Microsoft**: use your Microsoft account.
- **Google**: use your Google account.
- **Magic Link**: get a sign-in link by email. No password needed.
- **User/Password**: use your email and a password you create.



Pick how you want to sign in.

Microsoft or Google

If you're already signed in to that account on your phone, the app signs you in. If not, it asks for your email address.

Magic Link

1. Tap **Sign In with Magic Link**.
2. Enter your email address.
3. Tap **Send Magic Link**.
4. Open the email from the app on your phone.
5. Tap the link. You're signed in.

No email? Check your junk folder and the address you typed, then tap **Resend Magic Link**.

Create a password account

1. Tap **Sign In with User/Password**.
2. Tap **Create Account**.
3. Enter your email address.
4. Create a password.
5. Tap **Create Account**.
6. Open the verification email on your phone.
7. Tap **Confirm Email Address**.

Trouble signing in?

Call us at **(800) 675-5376** or email **support@directlegal.com**. Tell us the app version and build shown at the bottom of the Welcome screen.

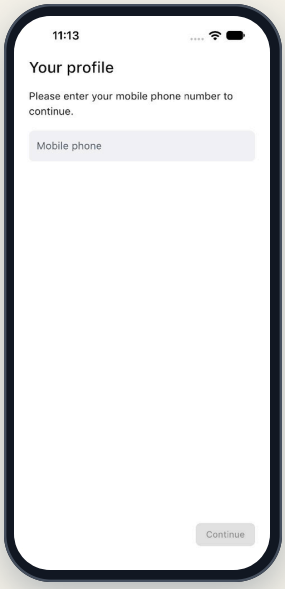
Once you're signed in, the app shows any setup screens or opens **Home**. To see your jobs, tap **Jobs**, then **Active Jobs**. If a job you expect isn't there, check that you signed in with the email we have for you, pull down to refresh, and call us if it's still missing.

Finish first-time setup

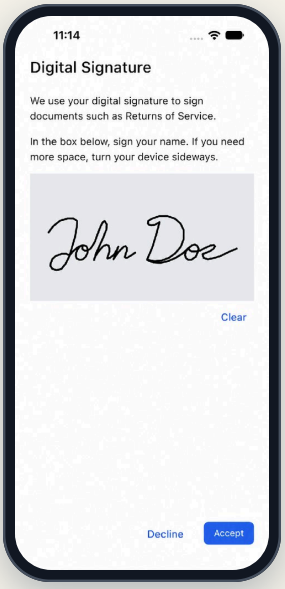
The first time you sign in, the app walks you through a few setup screens.

1. Read the **Mobile Application Terms and Conditions of Use**. Scroll through them and tap **Accept** if you agree. If you decline, setup can't be finished.
2. On **Your profile**, enter your name and your 10-digit mobile phone number.
3. Tap **Continue**.
4. On **Digital Signature**, sign your name in the box. Turn your phone sideways for more room. Tap **Clear** to start over, and look at your signature before you tap **Accept**.
5. The app opens **Home** when setup is done.

> Your saved signature goes on documents such as proofs of service. You can change it later in **Profile**.



Enter your name and mobile number.



Sign your name, then tap Accept.

Get your phone ready for field work

- **Location.** SDXPro uses your location for proof of service and routing. If you see **Location Services Not Enabled**, tap **Enable Location Services**, turn on location for SDXPro in your phone's settings, and come back to the app.
- **Before you leave.** Open the job while you have internet. Check the address, service instructions, documents and due dates. Make sure your profile is right and your camera works. Allow the permissions your phone asks for.
- **Photos.** Use the app's camera for new attempt photos. From your photo library, use the original photo when you can. Screenshots, edited copies and shared copies may not keep the photo's location. A date or map printed on a picture is not the same as the location saved in the photo.
- **Updates.** If you see **Version Not Supported**, tap **Update Application** and install the update before you go on.
- **Camera.** If the camera doesn't start, tap **Open Settings**, allow camera access for SDXPro, and go back to the app.

02 Finding Your Way Around

The tabs at the bottom of the screen and the Home dashboard.

How the app is organized

Tap a tab at the bottom of the screen to switch between work areas. A job or attempt opens on its own screen with its own controls.

Tab	Use it for
Home	Your job counts, priorities, nearby jobs and drafts
Jobs	Active Jobs and My Work List
Proofs	Proofs waiting for your signature
QR Scanner	Opening a job from its QR code
Profile	Your contact details, picture, signature and account options

- Pull down on a list to refresh it. A spinning indicator means the app is still working. Wait for it before you tap again.
- Back arrows take you to the previous screen. In an attempt, tap the **X** to choose whether to save your work as a draft.

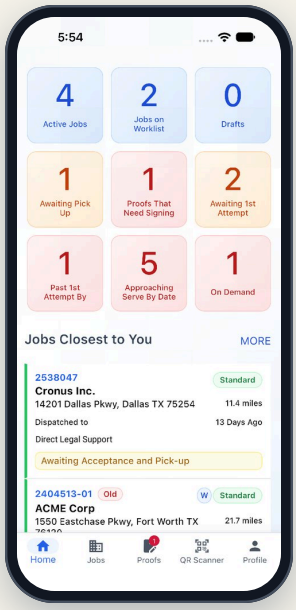
Use the Home dashboard

Tap a tile to open that work. **Active Jobs** opens your active list, **Jobs on Worklist** opens the jobs you planned, and **Drafts** opens attempts still saved on your phone. Other tiles open filtered lists.

Tiles can include Awaiting Pick Up, Proofs That Need Signing, Awaiting 1st Attempt, Past 1st Attempt By Date, Approaching Serve By Date and On Demand. The tiles and counts depend on your jobs. Swipe across the tiles to see more.

Jobs Closest to You lists jobs near you. Tap one to open it, or tap **MORE** to see your jobs sorted by distance. Scroll down for other priority lists.

> The **Drafts** count includes unfinished drafts and finished attempts that are still pending, submitting or failed. If it isn't zero, check what still needs attention.



Home shows your job counts and shortcuts.

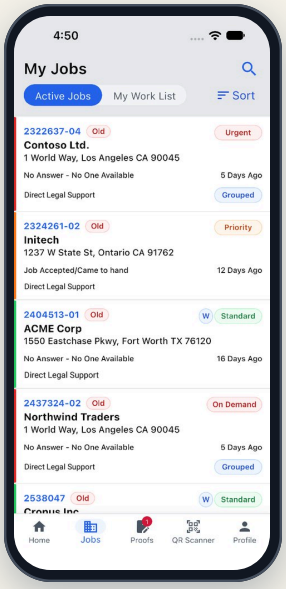
03 Managing Your Jobs

Find your jobs, build your work list, sort it and plan your route.

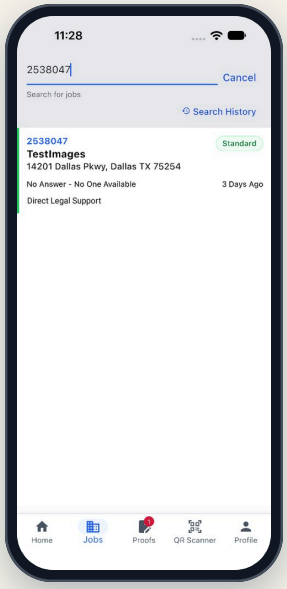
Find and search for jobs

1. Tap **Jobs**, then **Active Jobs**.
2. Each card shows the order number, who's being served, the address, the service level, the latest status and how long ago it changed. A **W** means the job is on your work list. You may also see **Grouped** or **Old**.
3. Tap a card to open the job. Read any notice at the top first.
4. To find a job, tap the magnifying glass and type, for example, the order number. Results update as you type.
5. Turn on **Search History** to include older jobs. Older or locked jobs may open as view only.
6. Tap **Cancel** to go back to Jobs.

No results? Check the order number, try fewer characters, and turn on Search History if the job is older. Pull down on the list to refresh when you expect a new job.



Active Jobs lists your jobs.



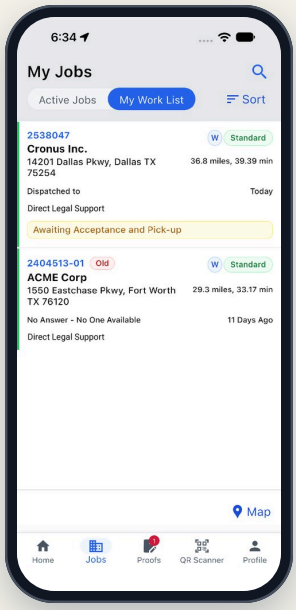
Search by order number. Turn on Search History for older jobs.

Build your work list

My Work List is the set of jobs you plan to work. Adding a job to it only organizes your day; it does not accept the job.

1. Swipe a job left to add it. A **W** marks it.
2. To add several, press and hold a card, tap the jobs you want (or **Select All**), then tap **Add to Worklist**. Tap **Close** when you're done.
3. Tap **My Work List** to see your jobs.
4. Swipe a job right to take it off the list. For several, press and hold, select them and tap **Remove from Worklist**.
5. Tap **Sort** to set the order. My Work List also has **Routing** and **Custom Sort**, and where you see drag handles you can move jobs into the order you want.

> Taking a job off your work list doesn't cancel it or delete its attempts. You'll still find it in Active Jobs.



My Work List holds the jobs you picked.

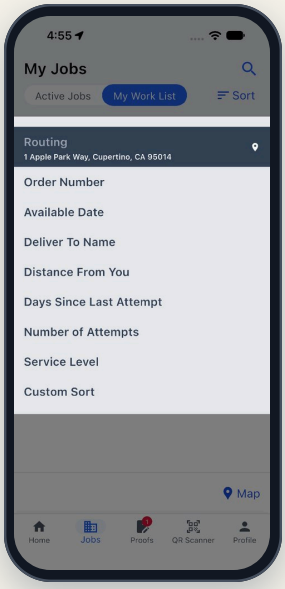
Sort jobs and plan your route

Tap **Sort** in Active Jobs or My Work List. You can sort by Order Number, Available Date, Deliver To Name, Distance From You, Days Since Last Attempt, Number of Attempts or Service Level. Tap the same choice again to switch between ascending, descending and no sort. The arrow shows which.

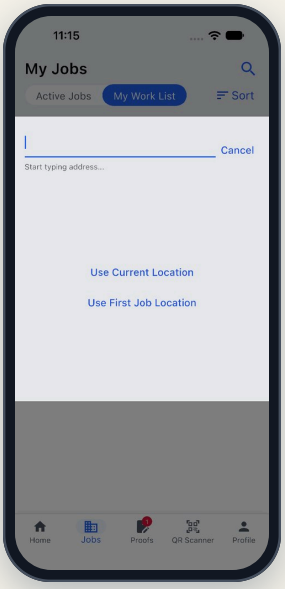
To plan a route, open My Work List, tap **Sort**, then **Routing**. Pick a starting address from the search, or tap **Use Current Location** or **Use First Job Location**. Check the order before you head out.

If you see **Map** on My Work List, tap it for a map of your jobs with numbered stops. Tap a stop to see the job. **No mapped jobs on your worklist** means the jobs don't have usable addresses, so check them in the list.

For directions to one job, open its **General** tab and tap **Map** next to the address. Check the destination in your map app before you drive.



Pick how to sort your jobs.



Choose a starting point for your route.

Open a job with the QR scanner

1. Tap **QR Scanner** at the bottom of the screen.
2. Allow camera access if your phone asks.
3. Hold the job's QR code steady until the camera reads it.
4. Check that the right job opened before you do anything.

The scanner reads job QR codes only; other codes do nothing. If a code won't scan, add light, flatten the page and cut the glare, then try again. You can always find the job with search instead.

> The scanner on the **Grouped Jobs** screen is different: it picks jobs from the group you're working on. Check the number selected before you submit. Try the camera features on your phone before you rely on them in the field.

04 Working a Job

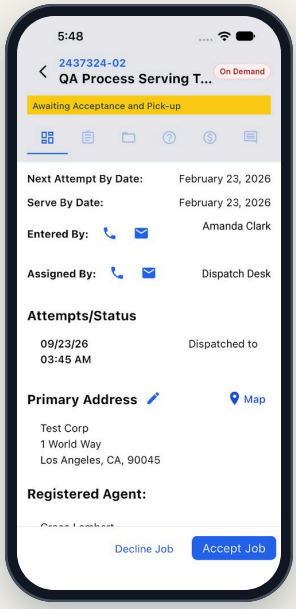
Look over a new job, accept or decline it, and read its details, documents and addresses.

Look over a new job

Before you accept or decline a job, look it over. The six icons at the top open **General**, **Attempts/Status**, **Documents**, **Instructions**, **Charges** and **Comments**. Check who's being served, the address, the deadlines, the documents and the instructions.

When the job shows **Awaiting Acceptance and Pick-up**, **Accept Job** and **Decline Job** are at the bottom of the screen.

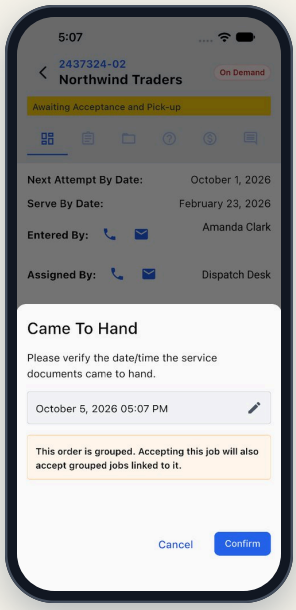
> Accepting a job starts it, so check it carefully first.



A new job waiting for you to accept it.

Accept a job

1. Tap **Accept Job**.
2. The **Came To Hand** sheet shows when the documents came to hand. Check the date and time.
3. To change it, tap the date and time (or the pencil). Pick the date and tap **OK**, then pick the time and AM or PM and tap **OK**. You can choose today or up to seven days back.
4. Check the date and time on Came To Hand. If a grouped job notice appears, read it: accepting this job also accepts the jobs grouped with it.
5. Tap **Confirm** to accept, or **Cancel** to close the sheet without accepting.
6. In **Attempts**, look for **Job Accepted/Came to hand**. The Awaiting Acceptance banner goes away, and **Attempt** and the camera button appear.
7. Tap **Attempt** when you're ready to record the visit. It starts with photos. On California jobs, the AB 747 checks come right after.

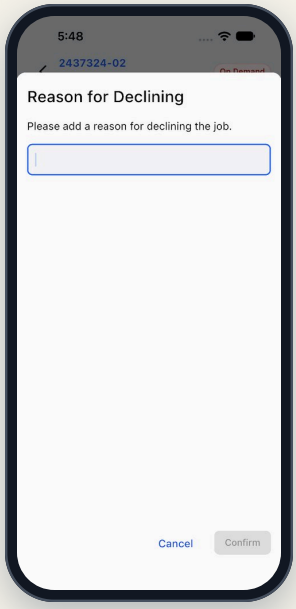


Check when the documents came to hand, then tap Confirm.

Decline a job

1. Tap **Decline Job**.
2. In **Reason for Declining**, type the real reason. **Confirm** turns on once you type.
3. Read any grouped job notice and your reason, then tap **Confirm**. To keep the job instead, tap **Cancel**.
4. A declined job goes no further. Call us if it needs to come back to you or be corrected.

> Locked jobs may not show these buttons. Call us when you can't change a job or something on it isn't clear.

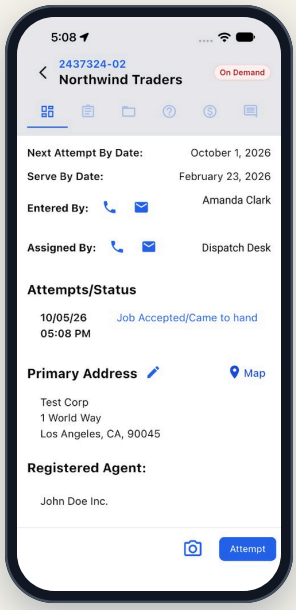


Confirm stays gray until you type a reason.

The General tab

General has the job overview: deadlines, contacts, status history, the main address and any other addresses. Depending on the job, it can also show witness fees, documents served and pickup details.

1. Tap the **General** tab, or swipe to it.
2. Read **Next Attempt By Date** and **Serve By Date**.
3. Check who's being served and the main service address.
4. Open **Documents Served** if it's there.
5. Look at **Attempts/Status** so you don't miss earlier activity.

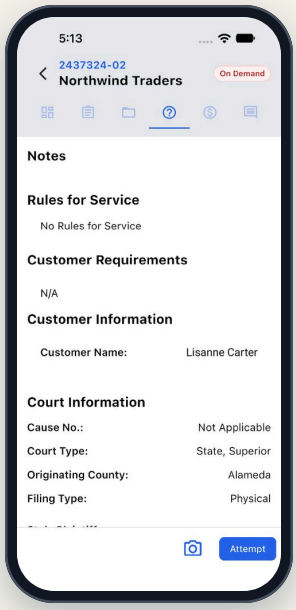


After you accept, the Attempt button appears.

The Instructions tab

Instructions can hold information you need to complete the service. Read all of it, including sections that expand. Some details and contact buttons depend on the job type and your account.

1. Tap the **Instructions** tab, or swipe to it.
2. Read the service instructions, **Rules for Service**, court information and customer information.
3. Use the phone or email buttons to contact the person listed. They open your phone's phone and email apps.



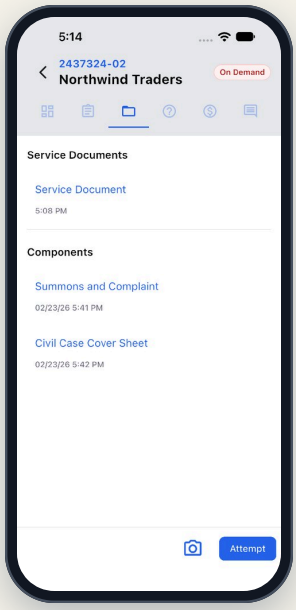
Instructions has the job's requirements.

View job documents

Open the **Documents** tab and tap a document. Documents are grouped by type and can show notes, who added them and dates. If there are none, the app says so.

1. Open the document and let it load.
2. Read every page that matters, and check the order, the person being served, the dates and the service details.
3. Tap **Download** to save a copy on your phone. The app tells you the file name; tap **OK** to go back.
4. Tap **Print** to print it.
5. Go back to the job when you're done.

Download and Print work once the document loads. If it won't open, go back, check your connection and open it again. Proofs waiting for your signature also open from the Proofs tab (see **Review and sign a proof**).



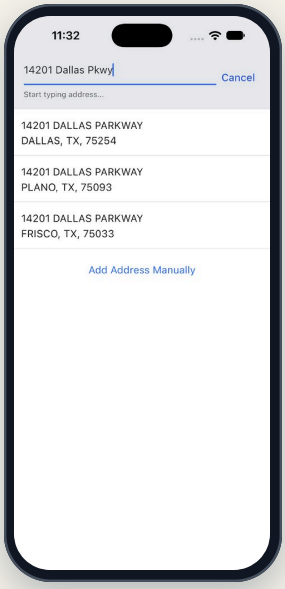
Documents lists the files on the job.

Choose or add an address

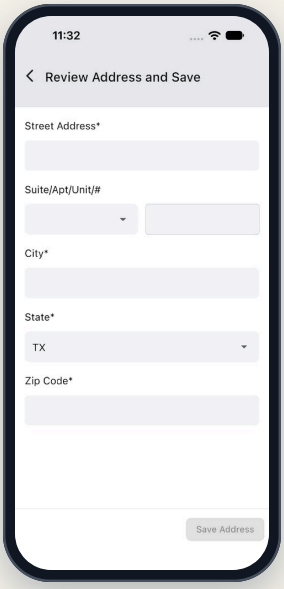
Use the address controls to pick one of the job's addresses or add a new one. When you record an attempt, the Location step also lets you choose where the attempt happened.

1. Open the address picker from **General**, or tap **Add Address** on the attempt's Location step.
2. Search for the address and pick the right result. If the search can't find it, tap **Add Address Manually**.
3. Check the address and fill in the street, city, state, ZIP code and suite or unit.
4. Tap **Save Address**. Back on the job or the Location step, check the address.
5. If **Similar Jobs** appears, pick only the jobs that should get this address and tap **Copy Address**.

> Saving an address can change the job right away, so check the order and the address first. The service address is not the same as the GPS location saved in a photo.



Search for the address or enter it yourself.



Fill in the address, then tap Save Address.

05 Recording an Attempt

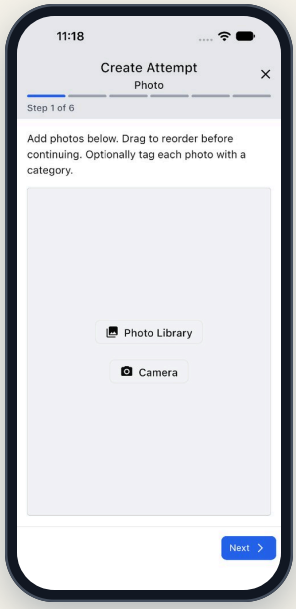
Photos, AB 747 exceptions, status, date and time, location, person and comments.

Start an attempt with photos

Open the right job (accepted and not locked) and tap **Attempt**. If you still see Accept Job and Decline Job, **accept the job** first. The attempt starts with **Photo**. The camera button next to Attempt opens the same steps with the camera ready.

1. Tap **Photo Library** to choose photos you have, or **Camera** to take new ones.
2. Frame the shot and tap the shutter. Wait for each photo to finish before you take the next. The counter shows how many you've added.
3. Take any other views you need, then tap **Done** or close the camera.
4. Check the photos and their categories, then tap **Next**.

> The app saves your progress on your phone as you go. If the job already has a draft, Attempt opens that draft. Check the photos and other details so you don't mix two visits.



The Photo step starts a new attempt.

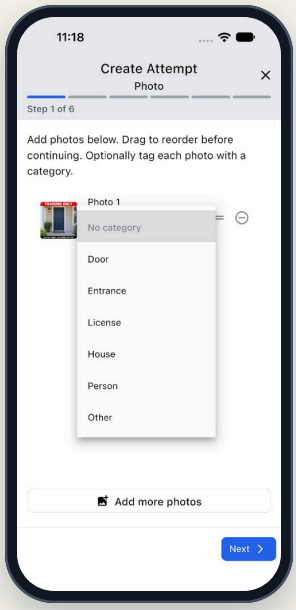
Manage photos and their categories

Tap **Add more photos** to attach more. Each one is listed as Photo 1, Photo 2 and so on. Pick a category under each photo. For a photo of the door or entrance, choose **Door**. The app goes by the category you pick, not by what's in the picture.

Drag the handle to change the order. Tap the remove button to take a photo out, or choose **Clear all photos** from the photo menu to start over.

On a new attempt, the first photo can set the attempt's date, time and GPS location. Adding, removing or reordering photos can change them, so check **Date and Time** after you change the first photo. Removing every photo resets the time to now and clears the photo's location.

Photos without GPS can still be added. On California jobs, missing photo evidence may open **AB 747 Exceptions** when you tap Next. A library photo without a capture time may get the time it was added, so check the attempt time yourself.



Tag the door photo as Door.

Complete AB 747 exceptions

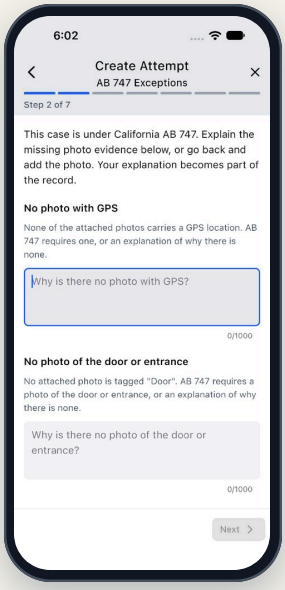
On a California job, this step appears right after Photo when your photos don't pass the app's checks. The job's jurisdiction decides this, not just the state in the address.

What's attached	What the app asks you to explain
No photos	No photo with GPS
Photos without GPS, none tagged Door	No photo with GPS *and* No photo of the door or entrance
Photos without GPS, at least one tagged Door	No photo with GPS
At least one photo with GPS, none tagged Door	No photo of the door or entrance
At least one photo with GPS and at least one tagged Door	Nothing. The step is skipped.

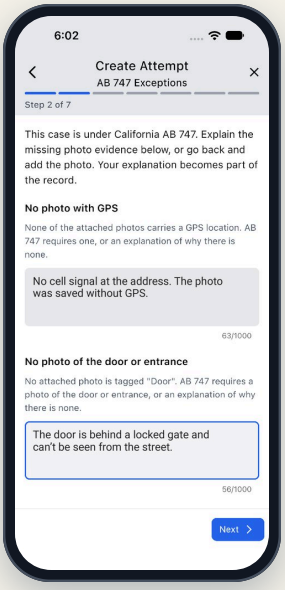
1. On Photo, check each photo and its category, then tap **Next**.
2. If **AB 747 Exceptions** opens, read the note above each box. **No photo with GPS** means the location saved in a photo, not the service address you picked. **No photo of the door or entrance** means no photo is tagged Door.
3. Type the real reason for each missing item. Each box takes up to 1,000 characters and becomes part of the attempt. If there are two boxes, fill in both. **Next** stays off until each box has text.

4. To add the evidence instead, tap **Back**, add the photo or tag a photo as Door, and tap **Next** again. The app checks again. The GPS photo and the Door photo can be two different photos.
5. Tap **Next** when your reasons are done, then go on to Status, Date and Time, Location, Person and Comments.
6. If you go back and change the photos, check the exceptions again before you submit. An earlier reason may no longer fit.

> With no photos at all, the app asks only for the No photo with GPS reason. These are the app's checks. Follow the job's instructions and Direct Legal Support's requirements for what photos to take and what to explain. See **the examples** at the end of this guide.



Missing GPS and a missing Door photo each need a reason.



Next turns on when both reasons are filled in.

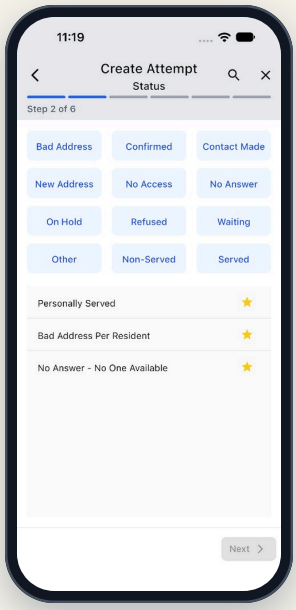
Choose the status

On **Status**, pick the outcome that matches what happened. The choices depend on the job. Shortcuts can include Bad Address, Confirmed, Contact Made, New Address, No Access, No Answer, On Hold, Refused, Waiting, Other, Non-Served and Served.

1. Tap a shortcut or search for the status.
2. Read the full description before you pick it.
3. Check your choice, then tap **Next**.
4. Tap the star on a status to keep it handy next time.

Pick the exact outcome, not just the group. For example, when no one answers, use the matching No Answer status; for a completed service, use the right Served status.

> The status changes what comes next. **Served** needs the person's information. Every other status needs a comment. If you change the status, check the rest of the attempt again.



Pick the status that describes this attempt.

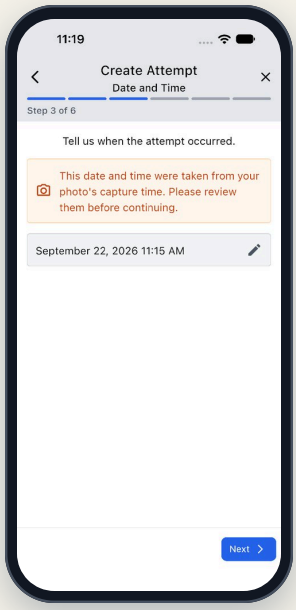
Check the date and time

Date and Time is when the attempt happened. If it came from a photo, the screen asks you to check the photo's capture time. Otherwise it starts with the current date and time.

1. Compare it with the actual visit.
2. To fix it, tap the date and time (or the pencil).
3. Pick the date, then the time, and confirm.
4. Check it and tap **Next**.

You can pick a date from the past year through today. Photo times are shown in your phone's time zone, so they may look different from the time zone where the photo was taken.

If you go back and change the first photo, check this step again. Changing photos on an attempt that's already submitted doesn't change its saved date and location.



Check the time that came from your photo.

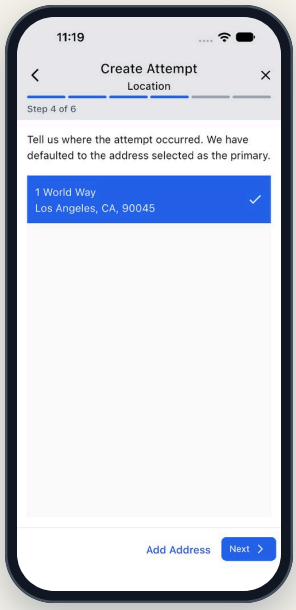
Confirm the location

Location asks which service address the attempt was at. The main address is selected to start.

1. Read the address, including the unit or suite.
2. If the attempt was at another listed address, tap it, check it on **Review Address and Save**, and save it.
3. If the real address isn't listed, tap **Add Address**.
4. Check the address on Location and tap **Next**.

The service address and the GPS position are two different things. Picking an address doesn't add GPS to a photo. A photo with GPS sets the attempt's position; without one, the app can use your phone's current location when you submit.

> If the addresses won't load, get a connection and try again. Don't pick a different address just to get through the steps.

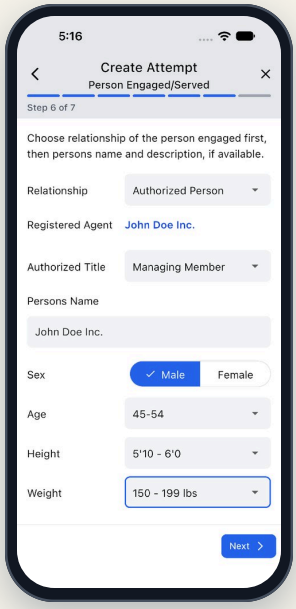


Pick the address where the attempt happened.

Record the person engaged or served

1. In **Relationship**, pick the one that fits. The choices depend on the status. Served offers Service Defendant, Witness or Authorized Person. Other statuses can include Associate, Employee, Family Member, Friend, Neighbor, Resident, Roommate and No One Available.
2. Enter the person's name if you know it. For Served, a name and relationship are required.
3. If you pick **Authorized Person**, pick an **Authorized Title**. It's required for Served. Check any Registered Agent information shown.
4. Fill in the description that applies: sex, age, height, weight, hair, skin tone, eyes and glasses. Scroll to see every field.
5. Use **Other Traits and Comments** for anything else that identifies the person (up to 250 characters), then tap **Next**.

> If no one answered, use **No One Available**. Don't make up details. If Next is off on a Served attempt, check the name, relationship and authorized title.



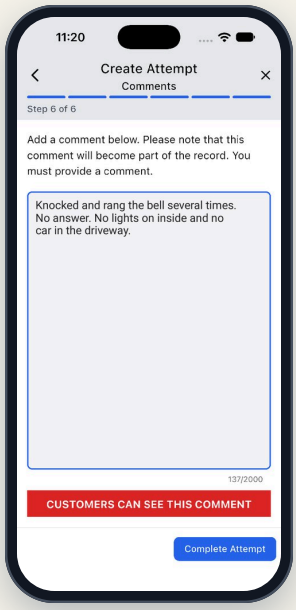
The relationship decides which fields you need.

Add the comment and complete the attempt

Comments is the last step. Write what happened, including anything the status doesn't say. The counter shows the limit for this job (250 or 2,000 characters).

1. Look back over the photos, exception reasons, status, date and time, address and person. Tap **Back** to fix anything.
2. Type the comment. Every status except Served needs one; Served can be left blank.
3. Customers can see this comment, so check the spelling and keep it accurate, professional and to the point.
4. Tap **Complete Attempt** once when it's ready.
5. Wait for the result. Then check that the attempt shows under **Submitted** in Attempts, or check its status if it was saved to send later.

> An attempt that couldn't send stays on your phone to try again. Saved on your phone doesn't mean we've received it, so check its status before you record the same visit again.



Customers can see this comment. Check it before you complete the attempt.

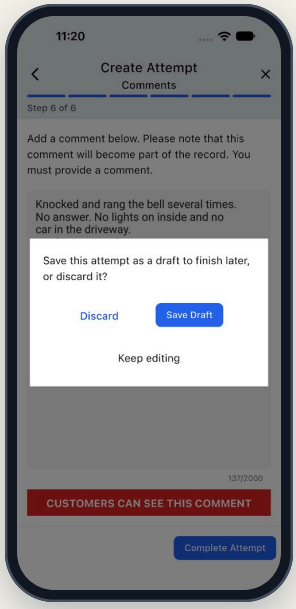
06 After the Attempt

Drafts, attempts waiting to send, changes, grouped jobs, comments, charges and proofs.

Save a draft and finish it later

1. Tap the **X** in the attempt.
2. Tap **Save Draft** to keep what you have and leave. **Keep editing** takes you back. **Discard** deletes the draft from your phone.
3. To pick it up again, go to **Home**, tap **Drafts** and pick it. You can also open the job and use its Attempts tab or the Attempt button.
4. Check the saved photos and details, finish the steps and complete the attempt.

> Drafts are saved on your phone only, so they won't be on another phone. Only discard work you really don't need (you can also swipe a draft left to remove it). An unsent draft may be the only copy.



Save Draft keeps an unfinished attempt for later.

Pending and failed attempts

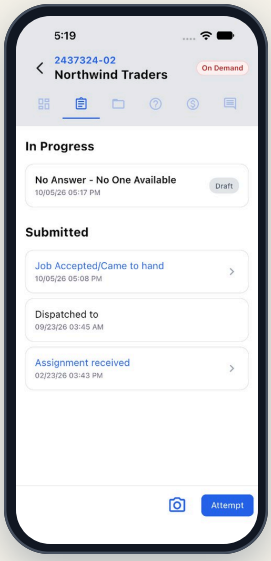
Home > Drafts and the job's **Attempts** tab show attempts saved on your phone. Attempts lists **In Progress** and **Submitted** separately.

Status	What it means and what to do
Draft	Not finished. Open it and finish the steps.
Pending	Finished and waiting to send. Get a connection and check again.
Submitting	Sending now. Wait for the result.
Failed	It didn't send. Read the error, then retry or edit it.
Submitted list	We have it. It's in the job's history.

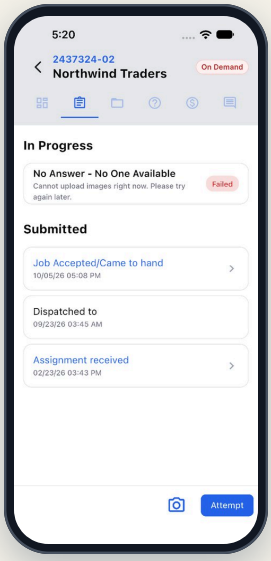
For a pending or failed attempt, open its menu. **Retry submission** sends it again. **Edit** turns it back into a draft so you can fix it and send it again. **Discard** removes it from your phone.

The app tries again when it starts and when your connection comes back, so keep the app open while you check. Some screens still need a connection to load jobs, addresses, statuses or documents.

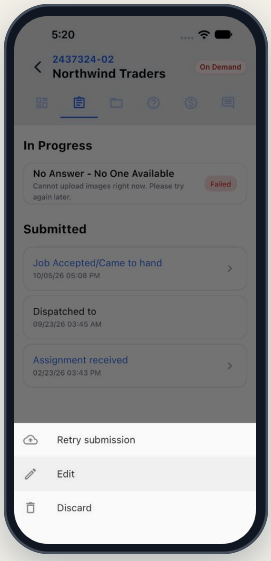
The time next to a draft is when it was last saved. Open it and check Date and Time for when the attempt happened.



Check whether an attempt was sent.



A failed attempt stays under In Progress with its error.

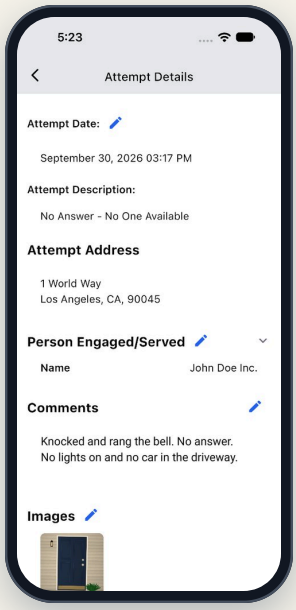


Retry or edit it from its menu.

Review or update a submitted attempt

1. Open the job's **Attempts** tab and tap a submitted attempt. **Attempt Details** shows the date, description, address, person, comments, AB 747 reasons and photos.
2. Make sure it's the right visit.
3. Tap a photo to see it full size and swipe through the others. Check the categories.
4. If editing is allowed, tap the pencil next to the part you need to change: date, person, comments or photos.
5. Make the change, tap **Update Attempt**, and reopen or refresh to check that it saved.
6. If you change photos on a California job, fill in any new AB 747 reasons before you save.

> Locked attempts don't show the pencils, and not every field can be edited. Call us if you need a change you can't make.



Attempt Details shows what was saved.

Apply an attempt to grouped jobs

After an attempt is submitted, the app may show **Grouped Jobs** when other jobs are at the same address. Your attempt has already been sent at this point.

1. Look over the jobs and select only the ones this attempt applies to.
2. Watch the count on **Submit**. At least one job must be selected.
3. You can tap the QR button to select jobs by scanning their codes. Check the selection when you come back.
4. Tap **Submit** to copy the attempt to those jobs.
5. Check the result and the job histories. Close the screen if you don't want to add the attempt to other jobs.

> Jobs at the same address can have different people to serve or different rules. Check each one before you copy the attempt. If you get an error, check those jobs before you try again.

Job comments and charges

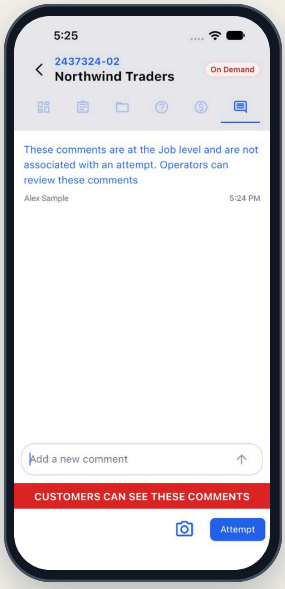
Job comments are separate from the comment in an attempt. Use them for messages about the job, and read the earlier ones before you post. **Customers can see these comments.**

1. Open **Comments**, type your comment and tap send.
2. Where allowed, tap one of your comments to **Edit Comment** or **Delete Comment**.

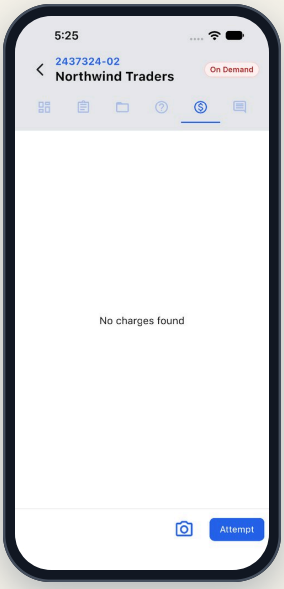
Charges lists each charge's description and commission, and the total of the commissions. What you can do depends on the job and the charge.

1. Tap a charge you can edit to open its menu.
2. For a charge by units, tap **Edit Charge** and enter the right **Quantity** (more than zero).
3. Tap **Update Charge** and check it in the list.
4. Use **Delete Charge** only when the charge should be removed. Some charges and locked jobs have no menu.

> **No charges found** means there are none on the job. Call us if you need a charge you can't add. Deleting a comment or charge changes the job record, so only do it when it should really go.



Job comments are separate from attempt comments.



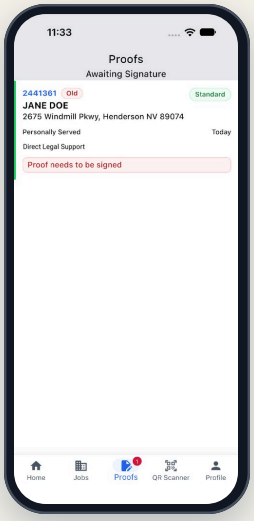
Charges, here with none on the job.

Review and sign a proof

1. Tap **Proofs** to see **Awaiting Signature**, or tap **Proofs That Need Signing** on Home. Tap the job to open its proof.
2. Make sure it's for the right order and person.
3. Read every page and check the service facts, dates, address and wording.
4. If something needs fixing, call us at **(800) 675-5376** or email **support@directlegal.com** before you sign.
5. When it's right, tap **Sign Document**. Your signature goes on right away; there's no preview.
6. Wait for the screen to refresh and check that the proof is no longer waiting for your signature.

Sign Document only shows on a proof you can sign. **Download** and **Print** work once the proof loads. Print opens your phone's print screen, where you choose the printer, pages, copies and paper. Download saves the file and tells you its name.

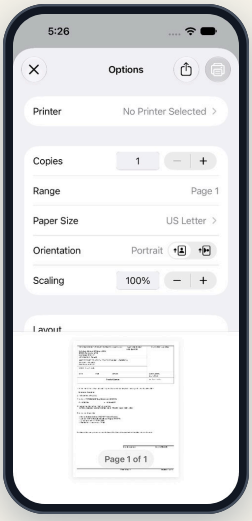
If you see **No proof available to sign for this order**, refresh the list; the proof may have changed. **No Proofs to Sign** means nothing is waiting in the list right now, not that every job is finished.



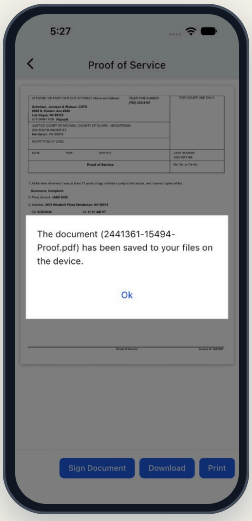
Proofs waiting for your signature.



Read the proof before you sign.



Choose the printer, copies and paper.



The app tells you the name of the saved file.

Before you finish for the day

Check **Home > Drafts** for attempts you haven't sent, make sure your finished attempts show as **Submitted**, look in **Proofs** for anything waiting for your signature, and check the due dates on your other jobs.

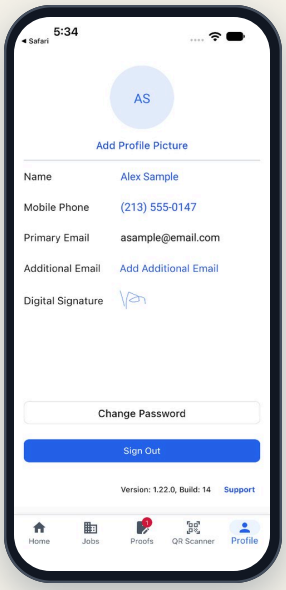
07 Your Profile

Your name, phone, picture, signature and password.

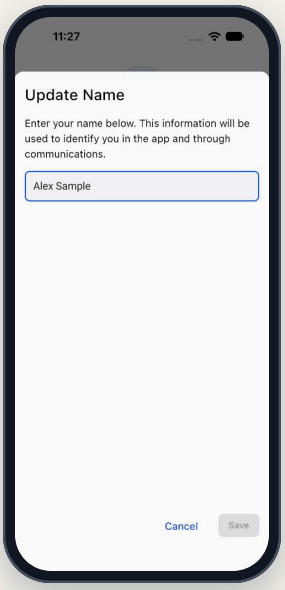
Keep your profile up to date

1. Tap **Profile**.
2. Tap **Add Profile Picture** or **Edit Profile Picture** to pick a photo. A remove button appears once you have one.
3. Tap your name, mobile phone or additional email to change it. Check it and save.
4. Your **Primary Email** is shown for your account. It's the email we have for you.
5. Tap **Digital Signature** to see or replace your saved signature. Tap **Clear** to redraw it.
6. Tap **Change Password** to get a password reset email, then follow its steps.
7. Need help? Call us at **(800) 675-5376** or email **support@directlegal.com**.

Sign Out ends your session. Before someone else signs in on the phone, finish or send any work saved on it.



Profile has your details and account controls.



Check a change before you save it.

08 Help and Troubleshooting

Who to call, and what to check when something doesn't work.

Get help

Call Direct Legal Support at **(800) 675-5376**, Monday to Friday, 8:30 a.m. to 5:00 p.m. Pacific, or email **support@directlegal.com**. Tell us what happened, and include:

- The email address on your account
- Your phone model
- The app version and build, at the bottom of the Profile screen
- Any error message
- What you did just before the error

Troubleshooting

What you see	What to check
Next is off on AB 747 Exceptions	Fill in every reason box shown, or go back and add the photo evidence.
Next is off on a Served attempt	Check the person's name, relationship and, if needed, the authorized title.
Complete Attempt is off	Add a comment. Every status except Served needs one.
The photo time looks wrong	Check which photo is first, its original information and your phone's time zone.
The app asks for GPS even though you picked an address	Picking an address doesn't add GPS to a photo.
An attempt failed	Read the error, get a connection, then tap Retry submission or Edit.
Editing buttons are missing	The job or attempt may be locked, or your account can't make that change. Call us.
A document or proof is missing	Refresh and open the job again. Call us if it's still missing.
The camera won't open	Allow camera access for SDXPro in your phone's settings.
Version Not Supported	Tap Update Application, update the app, and come back.

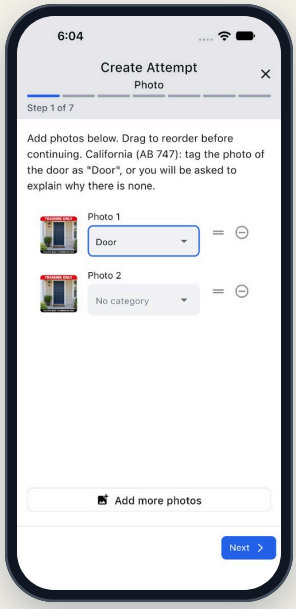
A Examples: AB 747 Photos and More

What the app does in common situations. Record only what really happened on a real visit.

A. California: Door photo with GPS

1. Add a photo that has GPS and tag it **Door**, then tap **Next**.
2. The app goes straight to Status. No exception is needed.
3. Pick the right No Answer status, check the date and time (shown in your phone's time zone) and the address, choose **No One Available**, and add a comment.

> The GPS and Door checks are met, but a No Answer status still needs a comment. The Door photo and the GPS photo can be two different photos.

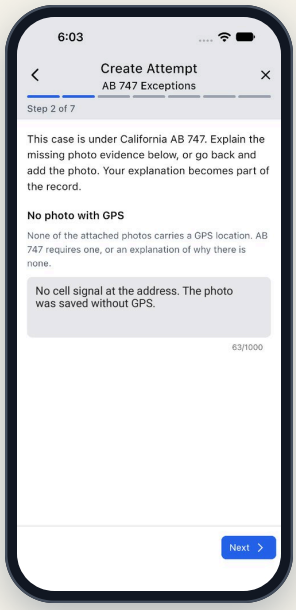


Door and GPS can come from different photos.

B. California: photo without GPS

1. Add a photo with no GPS and tag it **Door**, then tap **Next**.
2. The app asks only for **No photo with GPS**, not for a door reason.
3. Type the reason, then finish Status, Date and Time, Location, Person and Comments.

> The photo is accepted, but a reason is needed because no photo has GPS. Picking a service address doesn't remove this request.

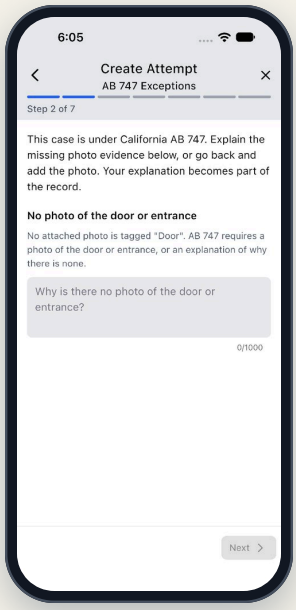


A Door photo without GPS asks only for the GPS reason.

C. California: photo not tagged Door

1. Add a photo that has GPS and shows the door, but leave its category blank.
2. Tap **Next**. The app asks for **No photo of the door or entrance**, even though the door is in the picture.
3. Go back, tag the photo **Door** and tap **Next** again. The exception step is skipped.

> The app goes by the category you pick. It doesn't look at the picture to find a door.

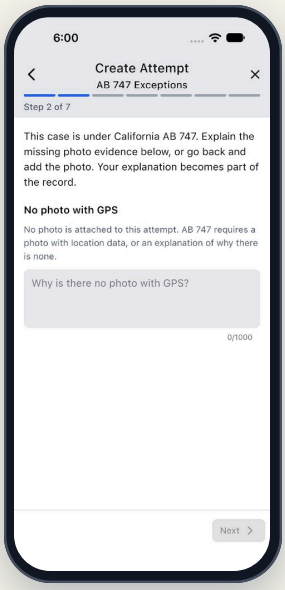


A GPS photo not tagged Door asks only for the door reason.

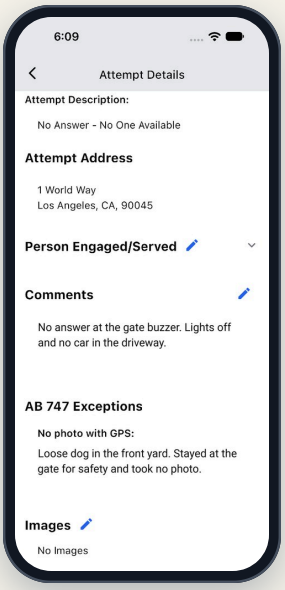
D. California: no photos

1. Leave Photo empty and tap **Next**. The app asks only for the **No photo with GPS** reason.
2. Type the reason.
3. Check the date, time, address and person, and add the comment.
4. After you submit, open the attempt in Attempts and check that your reason was saved.

> With no photos, the attempt starts with the current time, and the app can use your phone's location when you submit. A reason box doesn't decide whether the service or the evidence is enough for the job.



With no photos, the app asks for one reason.



The submitted attempt keeps your reason.

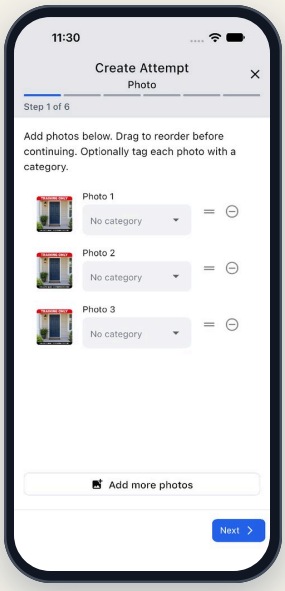
E. Job outside California

On a job outside California, a photo without GPS is accepted and there's no AB 747 Exceptions step. If the photo has no capture time, the app may use the time it was added, so set the real attempt time on **Date and Time**. The job's own instructions still apply.

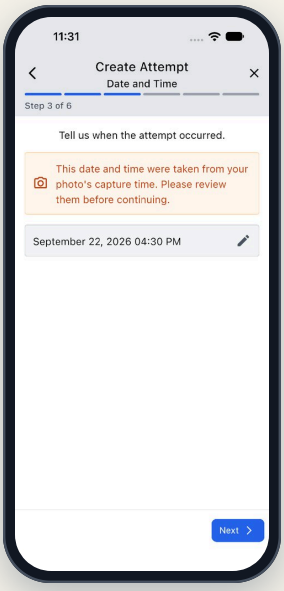
F. Photo order and the attempt time

1. Add two photos taken at different times. Note the time on **Date and Time**.
2. Go back to Photo and drag the other photo to Photo 1.
3. Check Date and Time again. It now shows the new first photo's time, in your phone's time zone.

> The time follows whichever photo is first right now. If you set a time by hand, check it again after you reorder. Changing photos on a submitted attempt doesn't change its saved date and location; use the date pencil if it needs fixing.



Check the photo order before you leave Photo.



The time changes to 4:30 PM when the afternoon photo becomes Photo 1.

G. Served and authorized person

1. Add your evidence and pick the right **Served** status. Check the time and address.
2. On **Person Engaged/Served**, choose Service Defendant or Witness and enter the name. You can't go on without a name and relationship.
3. With **Authorized Person**, also pick an **Authorized Title** from the list and check any registered agent details.
4. Served allows a blank comment, but add one anyway.

> If a title saved earlier isn't in the list anymore, pick one from the list instead of leaving it blank.

QUESTIONS ABOUT A JOB?
Call or email Direct Legal Support, Monday to Friday, 8:30 a.m. to 5:00 p.m. Pacific.

(800) 675-5376 support@directlegal.com