

Inspectix™ Manual

v 1.0



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Purchasing a License

Licensing of Inspectix is managed through In-App purchases. Licenses are available in either one month or one year intervals. Without a license, all features of the app are available but the report will have a watermark. To purchase a license, tap “Licensing” on the "Reports" screen (FIG 1). A view will appear showing your current subscription status and expiration date and give you the option to extend your subscription. Select your option and follow the prompts through completion.

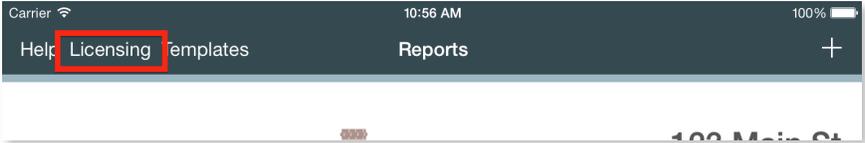


FIG 1

Managing Reports

Creating a New Report

Tap the "+" button on the top right hand side of the bar (FIG 2) and select the template you wish to use. To add information about the report such as the property address, the inspector’s name, date of inspection, property photo, report title, as well as the client’s name and contact information, simply tap the row of the newly created report and select the “Edit Report Details” button (FIG 3) . A screen will appear allowing you to enter the information (FIG 4).

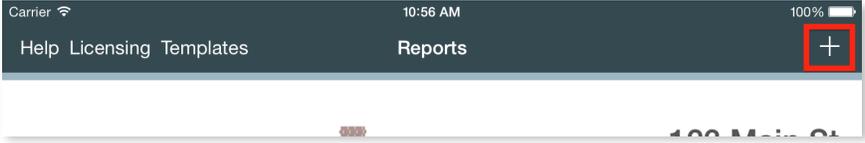


FIG 2



FIG 3

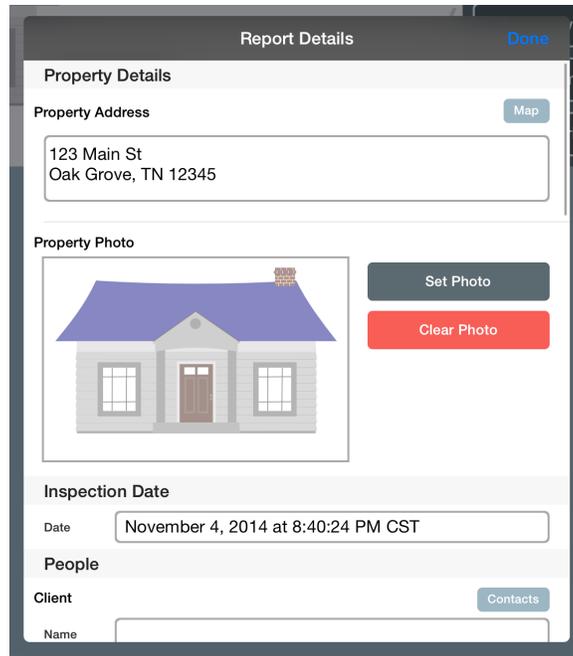


FIG 4

Viewing a Report

From the "Reports" screen, tap the row of the report you wish to view. The row will slide over revealing a column of buttons below (FIG 5). Tap the "Open Report" button to view the report editing interface.



FIG 5

Duplicating a Report

From the "Reports" screen, tap and drag the row of the report you wish to duplicate to the left. This will reveal the second button column. Tap the "Duplicate" button (FIG 6).

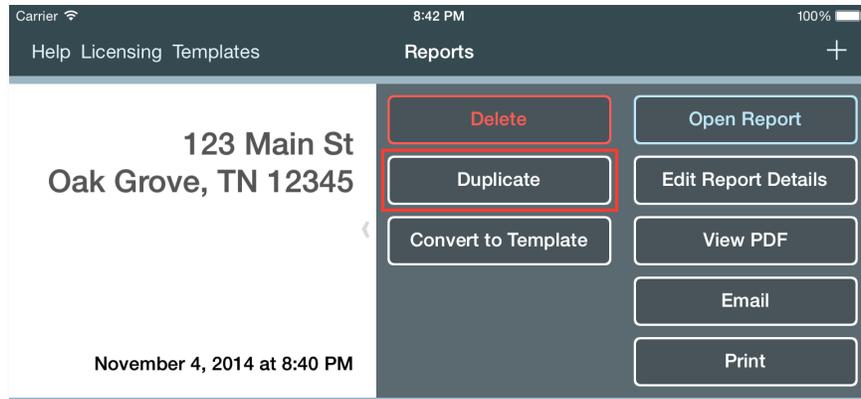


FIG 6

Deleting a Report

From the "Reports" screen, tap and drag the row of the report you wish to delete to the left. A second column of buttons will be revealed. Tap the "Delete" button (FIG 7). Confirm you wish to delete on the dialog that appears.

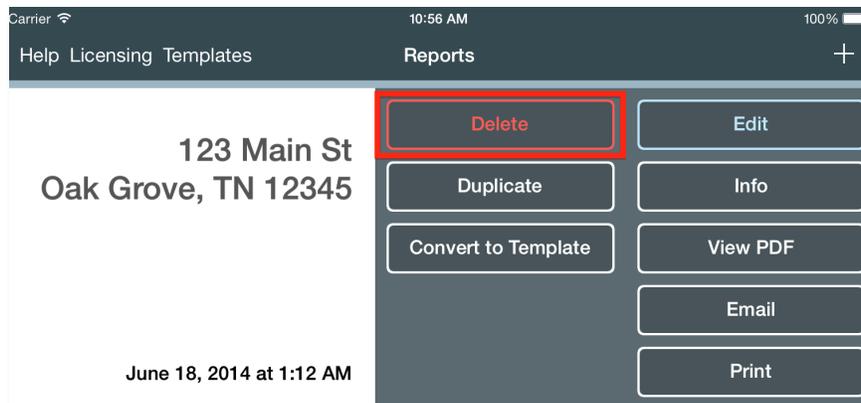


FIG 7

Editing a Report

The Basics

There are three basic elements in Inspectix reports. They are: Photos, Headers (rows that have only text), and Selection Items (rows with text and a checkbox, or round button, on the left-hand side). The final PDF report will only show photos, selected checkboxes, selected round buttons, and the headers that are above them. Rows and photos that are added below a selection item will only be shown in the final report if the checkbox is selected. To select, or deselect, a selection item, simply tap on the checkbox or round button. When a Selection Item is added below another selection item, instead of a checkbox, a round

button will be used. Selection items displaying the round button do not permit rows to be added below them.

Additionally it is important to understand how the elements are arranged in relation to each other. The basic format is similar to how a traditional document is structured. The darkest colored rows with the largest text are top-level elements. In FIG 8, the top level item is the “Plumbing” header. As you go to lower-level elements the background gets lighter and the text gets smaller. The lower level elements are “beneath” the top level elements. In FIG 8, “Plumbing” is over the “Descriptions” header which is over the “Water Heater” header, which has three items below it (the “Approximately 7 years old” selection item, the “Size” header, and the “Energy Source” header). Deleting, or moving, an element will cause the elements beneath it to be deleted or moved as well. In FIG 8, moving the “Energy Source” header will move the “Electric” selection item with it.

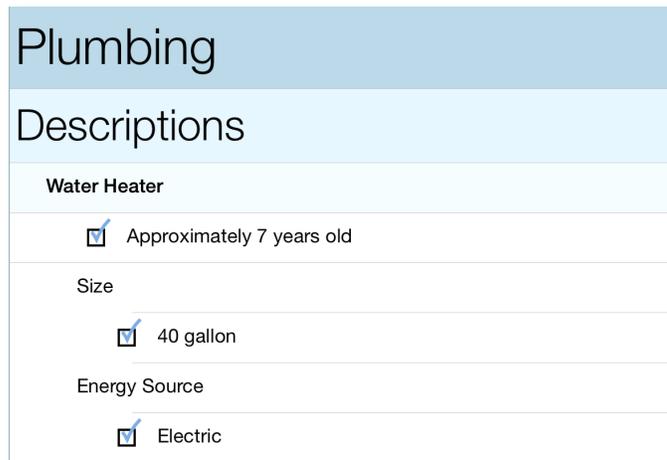


FIG 8

Adding a Header

Tap the "+" button to the side of any row and select “Add Header” (FIG 9). Another set of buttons will appear allowing you to select if you would like to insert the new header above or below the current row (FIG 10). When a header is added above the current row, it will be at the same level as the current row (it will be a sibling of the current row). When a header is added below the current row, it will be one level lower than the current row (it will be a child of the current row).

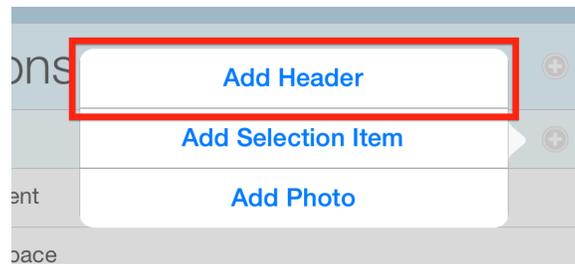


FIG 9



FIG 10

Adding a Selection Item

Tap the "+" button to the right of any row and select "Add Selection Item" (FIG 11). Another set of buttons will appear allowing you to select if you would like to insert the new selection item above, or below, the current row (FIG 12). When a selection item is added above the current row, it will be at the same level as the current row (it will be a sibling of the current row). When a selection item is added below the current row, it will be one level lower than the current row (it will be a child of the current row).

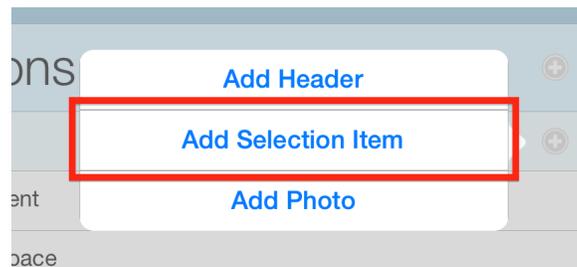


FIG 11

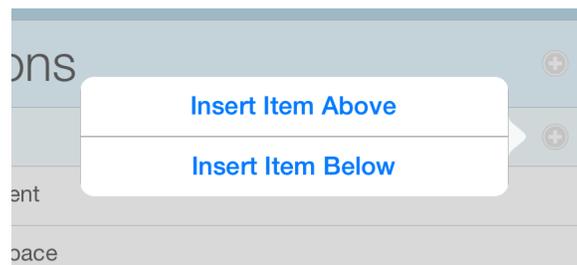


FIG 12

Adding a Photo

Tap the "+" button to the right of any row and select "Add Photo" (FIG 13). Next, select the photo you would like to add. Photos are always added below the current row.

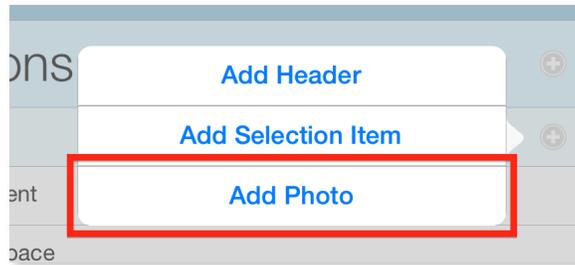


FIG 13

Adding a Top-Level Header

There are two easy ways to add a top-level headers (headers with the darkest color and largest text). The first method is to tap the “+” button on any top-level header, select “Add Header”, and then select “Insert Header Above.” The second method is to scroll to the bottom of the report and tap the “New Header” button (FIG 14).

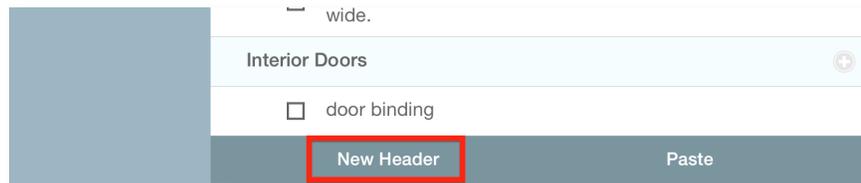


FIG 14

The Summary Section

Inspectix has the ability to add a summary section at the end of the PDF report. To add an item to the summary section tap and hold on any checkbox. If the checkbox is already selected, a red checkmark will replace the blue one. To deselect an item for the summary section, repeat the process above and the checkmark will revert to blue. Unselected checkboxes that, if selected, would be included in the summary section will display an empty red box. See FIG 15 below. You can select to include, or not include, the summary section and summary section title (for the PDF report) at the bottom of the “Inspection Info” screen (FIG 4).

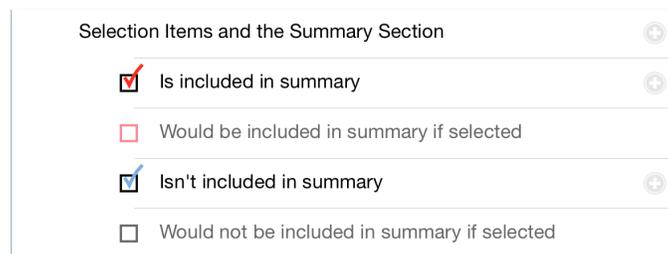


FIG 15

Moving a Row or Group of Rows

While in the report editing view, drag one finger over the row you wish to move and tap "Move." If there are any rows beneath the row you are moving, they will be moved along with that row. All of the rows that will be moved will be highlighted (FIG 16). A view will appear allowing you to rearrange the rows. When you are finished tap "Done" (FIG 17).

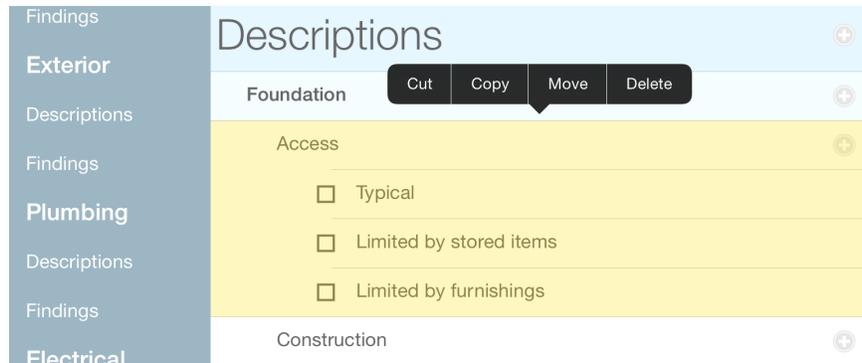


FIG 16

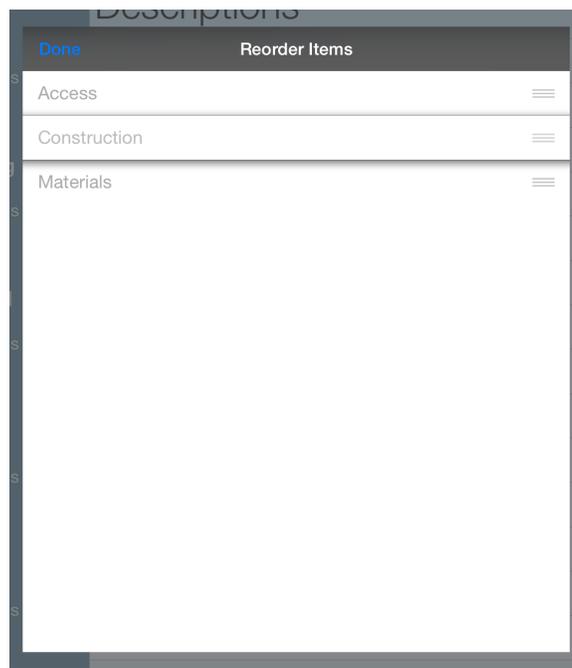


FIG 17

Copy/Paste

Copying:

To copy a row or group of rows, drag one finger over the row or leading row of a group of rows. The selected row, and any rows below it, will be highlighted (See FIG 16). Tap "Copy."

Pasting:

To paste tap the “+” button on any row and select “Paste” (FIG 18). Note that “Paste” will only be shown if you have something on the clipboard. After selecting “Paste”, you will be prompted to paste the row(s) above or below the current row.

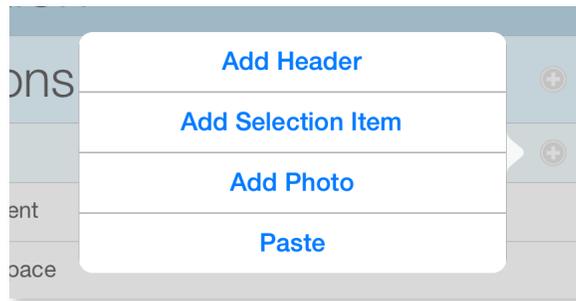


FIG 18

Deleting a Group of Rows

While in the report editing view, drag one finger over the row you wish to move and tap “Delete” (FIG 19). Any rows beneath the row you are deleting will be deleted along with that row. All of the rows that will be deleted will be highlighted in red.

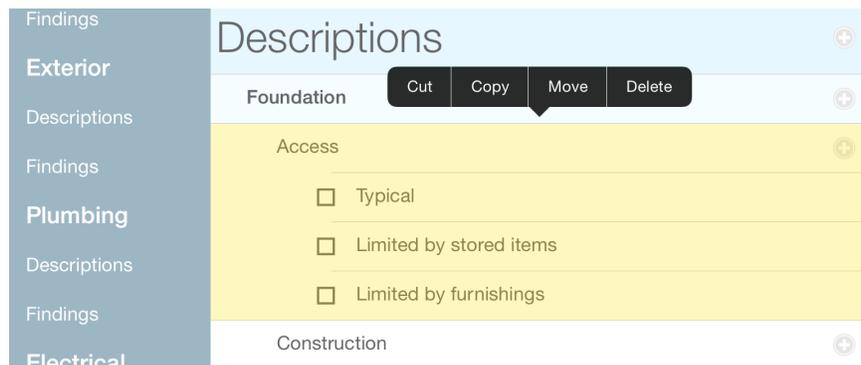


FIG 19

Review Mode

When you would like to review the current state of the report tap the “Review” button (FIG 20). This will collapse to report to only the items that will be included in the final PDF report. While in the review mode you can edit the text, deselect selection items, delete rows, copy rows, add items to the summary section, and move rows. You cannot add or paste any additional rows while in the review mode. To exit the review mode, simply tap the “Review” button again.

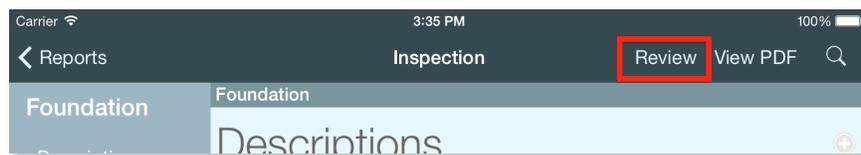


FIG 20

Search

Searching for text in a report is done by simply tapping the magnifying glass in the upper right hand corner and typing your search text in the search text field that appears (FIG 21). Clearing the search text field or tapping the magnifying glass again will clear the search.

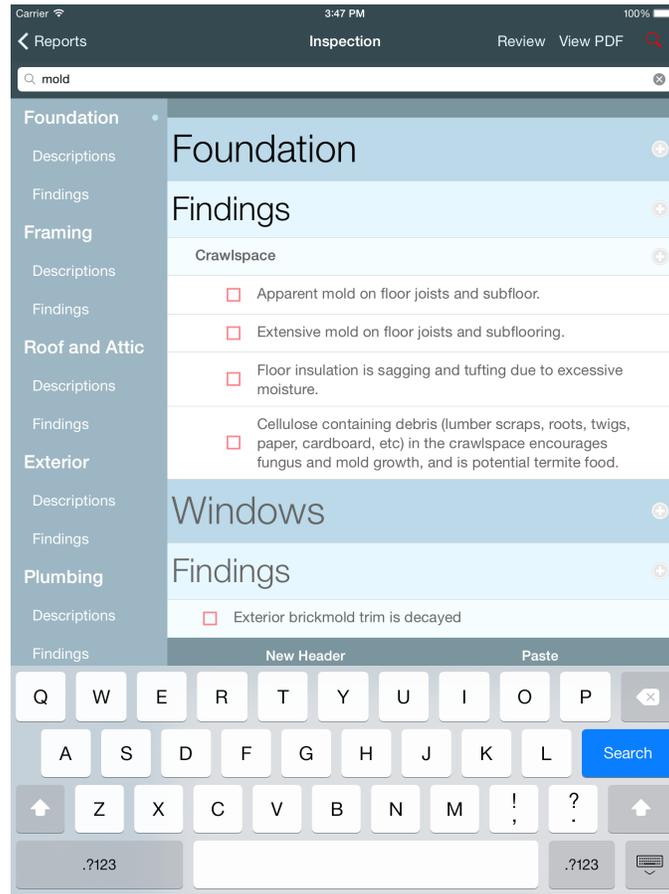


FIG 21

Invoice

Entering Client Billing Info

From the "Reports" screen, tap the row of the report you wish to view. The row will slide over revealing a column of buttons below. Next, tap the "Info" button (see FIG 3). Scroll down to the "Billing" section and enter the information. If you do not wish to send an invoice with the report, toggle the "Include Invoice with Report" switch to the off position.

Emailing an Invoice Without a Report

From the "Reports" screen, tap the row of the report you wish to send. The row will slide over revealing a column of buttons below. Tap the "Email" button. In the email form, delete the PDF for the inspection report leaving the invoice. Note, if no invoice is automatically included in the email, be sure the "Include Invoice with Report" option is selected. This can be found in the "Info" panel.



FIG 22

Final PDF Report

Setting the PDF Report Title

From the "Reports" screen, tap the report you wish to edit. The row will slide over revealing a column of buttons below. Tap the "Info" button (see FIG 3). Scroll down to the "Settings" section and enter the title in the "Report Title" field.

Viewing a PDF Report

From the "Reports" screen, tap the row of the report you wish to view. The row will slide over revealing a column of buttons below. Tap "View PDF" (FIG 23). Additionally, you can view the PDF report from within the inspection edit view by tapping the "View PDF" button on the upper right hand side (FIG 20).



FIG 23

Emailing a PDF Report

From the "Reports" screen, tap the row of the report you wish to view. The row will slide over revealing a column of buttons below. Tap the "Email" button (FIG 22).

Printing a PDF Report

From the "Reports" screen, tap the row of the report you wish to view. The row will slide over revealing a column of buttons below. Tap the "Print" button (FIG 24) and a print dialogue will appear.

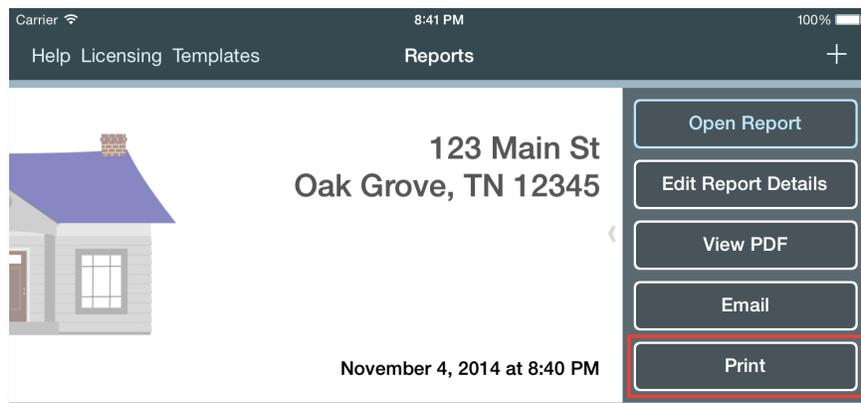


FIG 24

Opening a Report PDF in Another App

From the "Reports" screen, tap the row of the report you wish to view. The row will slide over revealing a column of buttons below. Tap the "View PDF" (FIG 23). Next, tap the button in the top right hand corner. A view will appear allowing you to choose the app in which you wish to use to open the PDF.

Templates

Editing a Template

Tap "Templates" on the top bar of the "Reports" screen (FIG 25). Choose the template you wish to edit. Tap "Edit Template" to begin editing.

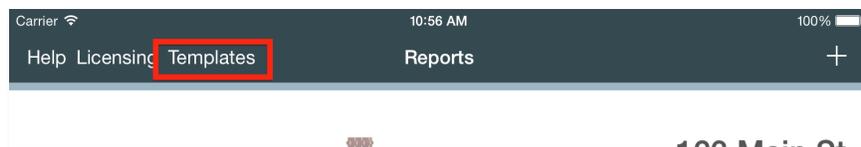


FIG 25

Adding Text Placeholders

In some situations a piece of information may need to be typed into to a pre-written sentence. Inspectix allows you to highlight those areas by placing double angle brackets around text (example : “<<Fill in this text>>”). Doing this will cause Inspectix to highlight that text in yellow. An example is below in Fig 22a. The highlight will not be shown for text in the final PDF report.



FIG 26

Creating a New Template

Tap "Templates" on the top bar of the "Reports" screen (FIG 25). Tap the "+" button on the pop up view. Enter a name for the new template and tap "Set" (FIG 27).

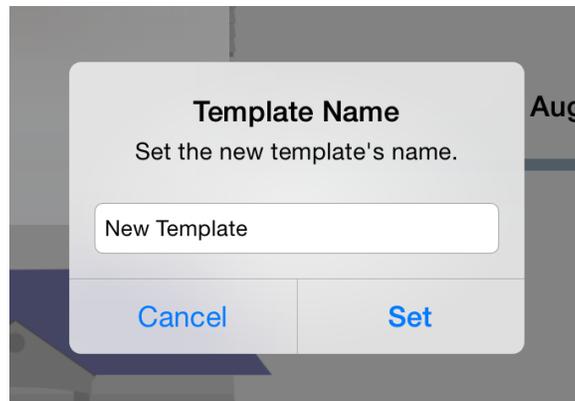


FIG 27

Creating a Template From a Report

From the "Reports" screen, tap and drag the row of the report you wish to convert the left to reveal a second column of buttons. Tap the "Convert to Template" button (FIG 28). Give the new template a name and tap "Save." During the conversion, Inspectix will remove all photos and deselect all selection items.

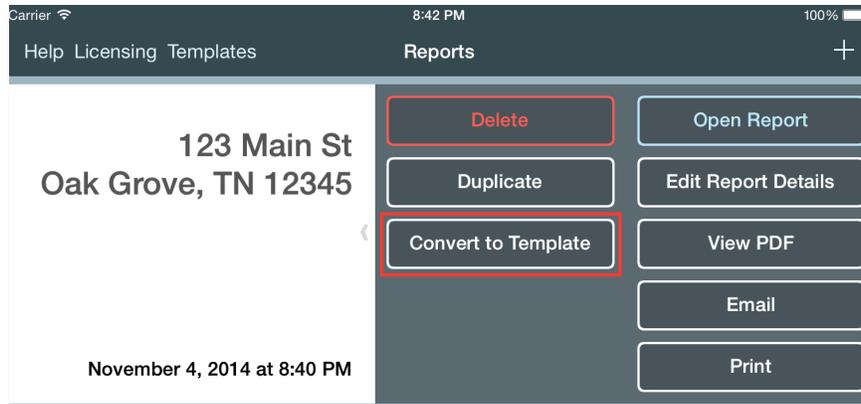


FIG 28

Renaming a Template

Tap "Templates" on the top bar of the "Reports" screen (FIG 25). Tap on the row of the template you wish to rename. Enter the new name in the text field in the view that appears.

Restoring the Original Template

You can restore the originally supplied template in a few simple steps. First, from the "Reports" screen tap "Templates" (FIG 25). Next, tap the "Edit" button. Finally, tap "Restore" on the bottom of the pop-up window. The restored template will be titled "Template 1 (Restored)."

Defaults

Setting Defaults

Inspectix defaults are managed through the Apple provided "Settings" app. Tap on the Settings app and scroll down to the Inspectix row in the left hand side pane. The settings can be edited in the right hand pane. The defaults that can be changed are:

- Including an invoice with the report automatically
- Setting and modifying the default inspector's info
- Setting the default report title
- Selecting the report layout (one-column vs two column)
- Choose to BCC self when emailing from Inspectix
- Select to include the summary section in the PDF report by default