Inspectix™ Manual

Version 2.2

Contents

1 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 the button on the top left hand corner on the "Reports" screen (Figure 1). Next, select "Licensing Manager" (Figure 2). 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.

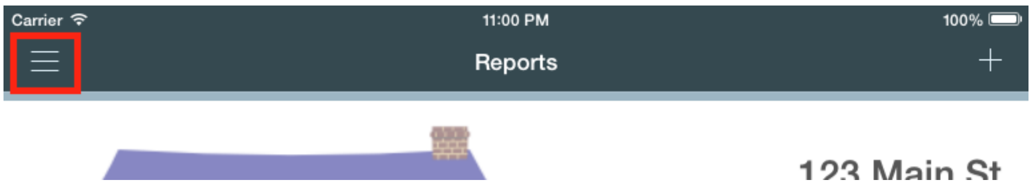

Figure 1: Display settings button.

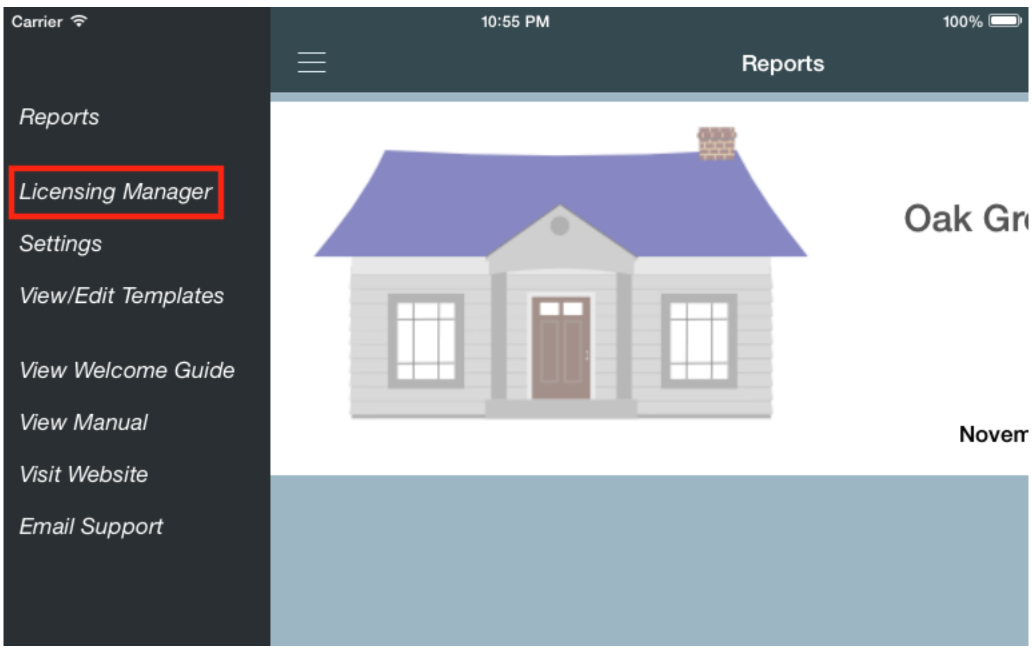

Figure 2: Tap licensing manager button.

2 Managing Reports

2.1 Creating a New Report

Tap the "+" button on the top right hand side of the bar (Figure 3) 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 (Figure 4). A screen will appear allowing you to enter the information (Figure 5) on various tabs.

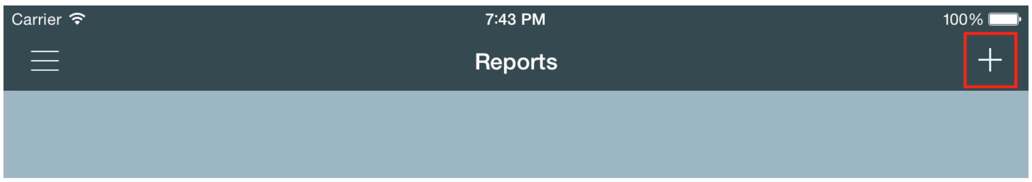

Figure 3: Tap add button.

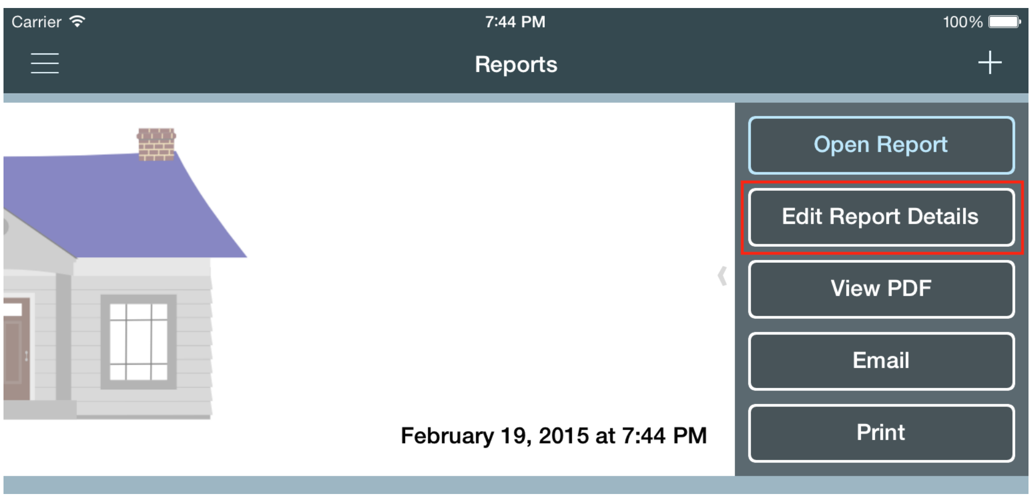

Figure 4: Tap edit report details.

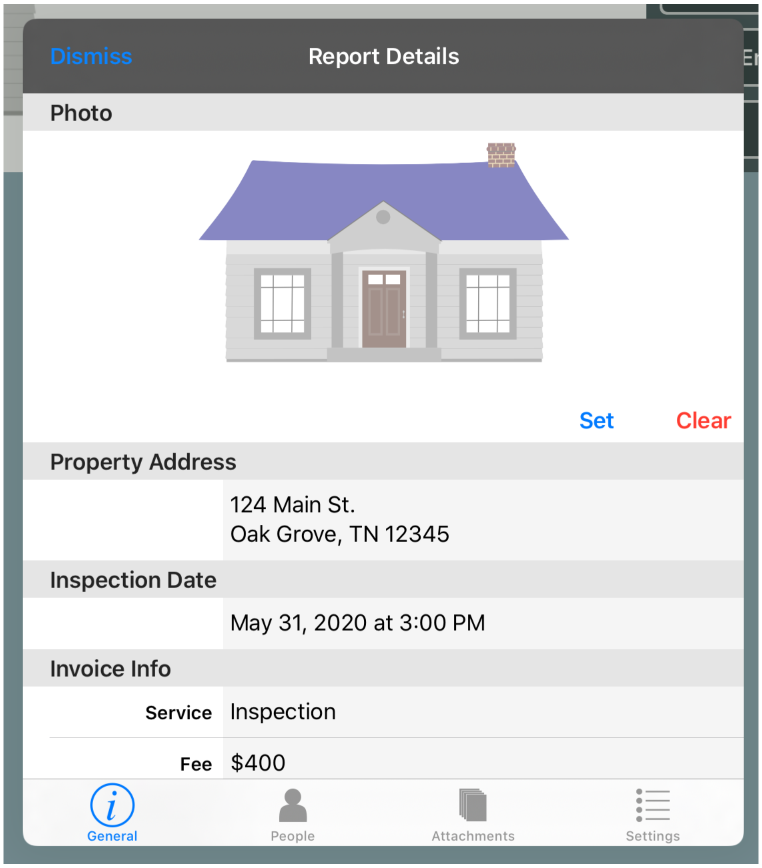

Figure 5: Edit form.

2.2 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 (Figure 6). Tap the “Open Report” button to view the report editing interface.

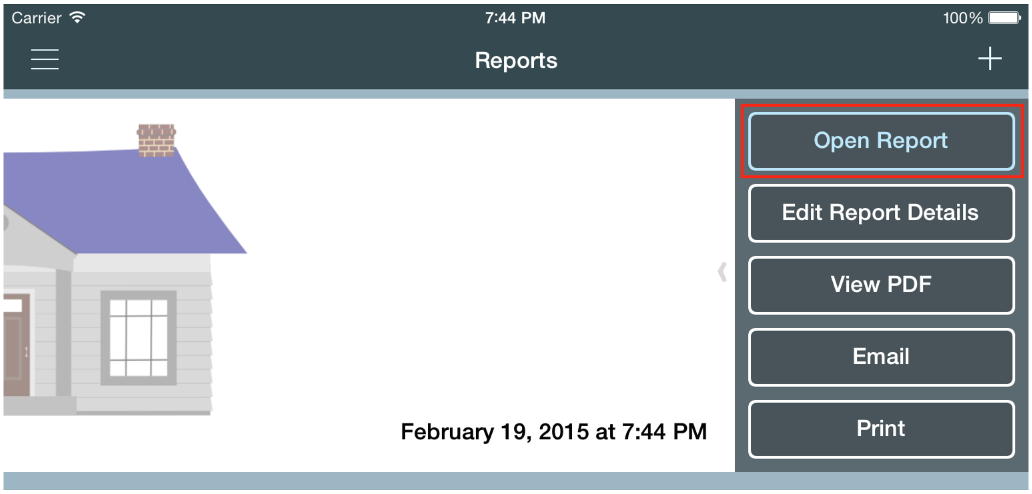

Figure 6: Tap the “Open Report” button.

2.3 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 (Figure 7).

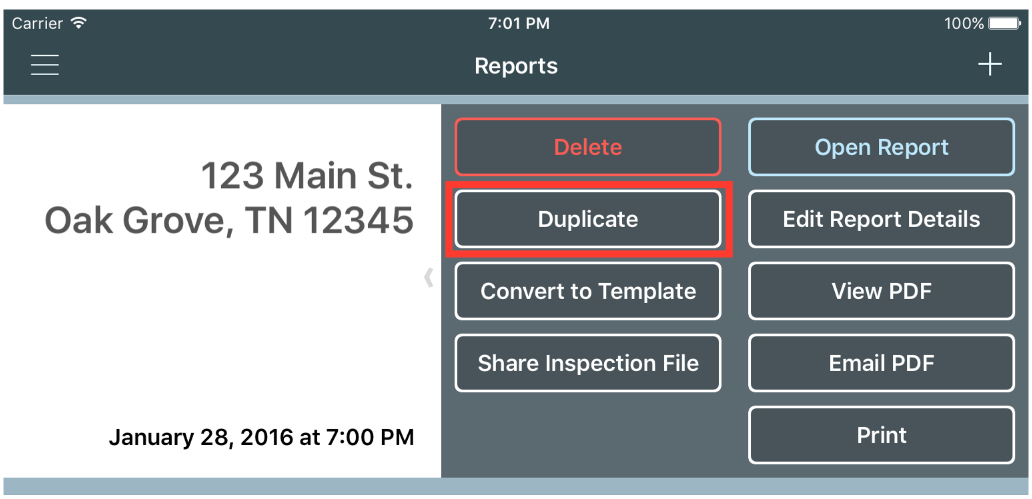

Figure 7: Tap the “Duplicate” button.

2.4 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 (Figure 8). Confirm you wish to delete on the dialog that appears.

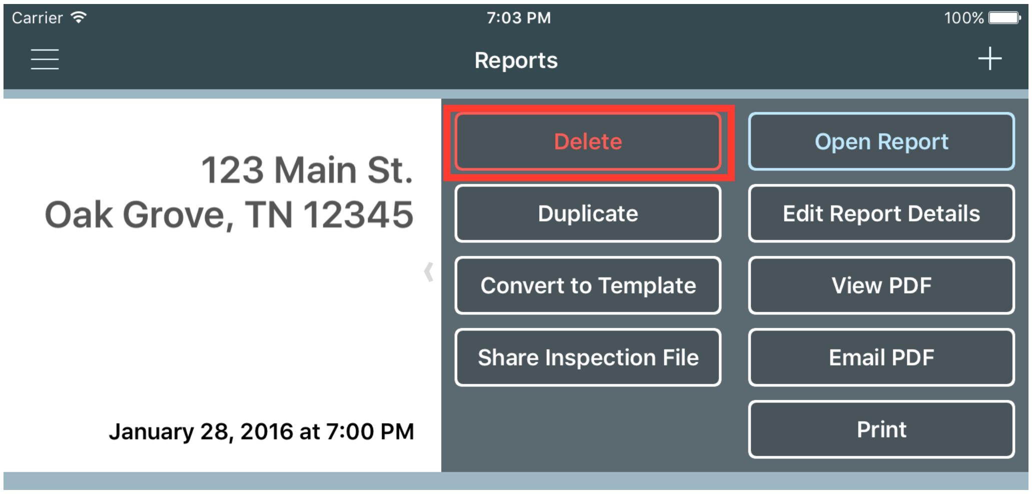

Figure 8: Tap the "Delete" button and confirm on following dialog.

2.5 Exporting a Report File

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 "Share Inspection File" button (Figure 9). A popover will appear that will allow you to export the report file through a variety of methods including email, iCloud, AirDrop, iMessage, and Dropbox (if installed on the device).

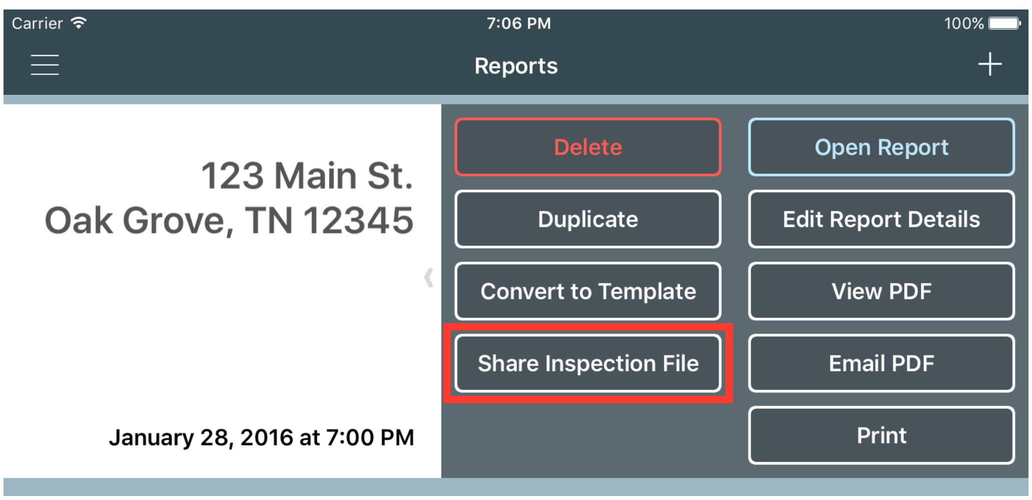

Figure 9: Tap the "Share Inspection File" button.

2.6 Importing a Report File

Importing a report file is easy. This is done using the system "Open In" menu. For example, if you receive a file via email, tapping on the icon of the attachment will show you the "Open In" menu. Simply choose to open the file in Inspectix. When a report file is shared with you via AirDrop, an interface will appear allowing you to open the file in Inspectix.

3 Editing a Report

3.1 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 Figure 10, 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 Figure 10, “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 Figure 10, moving the “Energy Source” header will move the “Electric” selection item with it.

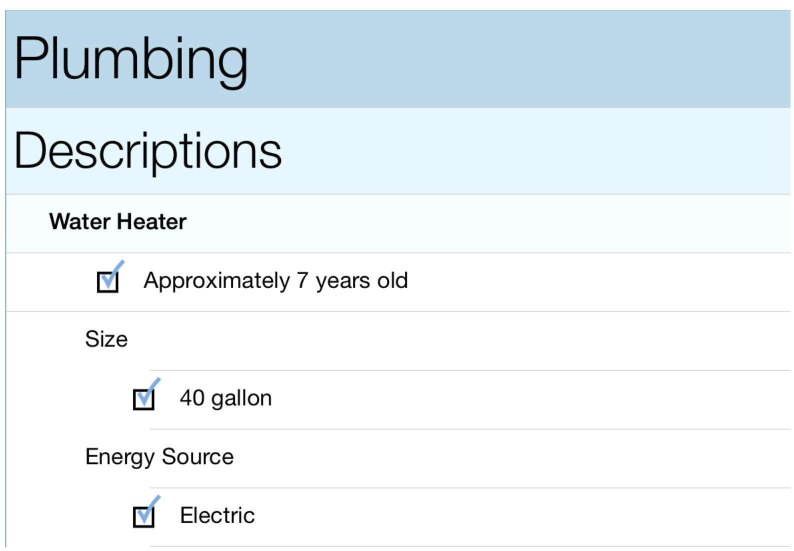

Figure 10: Example of a basic hierarchy of elements.

3.2 Adding a Header

Tap the “+” button to the side of any row and select “Add Header” (Figure 11). 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 (Figure 12). 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).

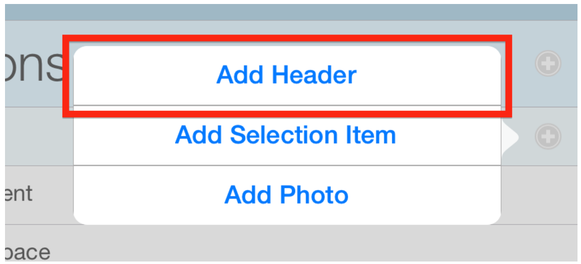

Figure 11: Tap “Add Header” button.

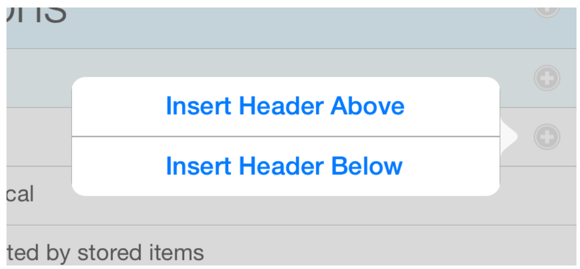

Figure 12: Choose insertion location.

3.3 Adding a Selection Item

Tap the “+” button to the right of any row and select “Add Selection Item” (Figure 13). 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 (Figure 14). 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).

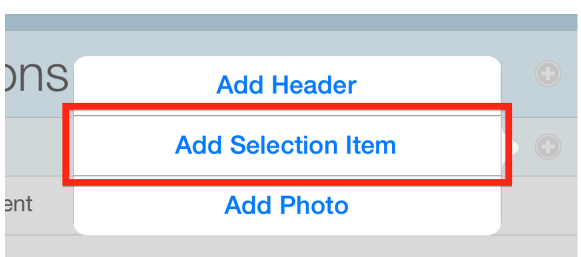

Figure 13: Tap “Add Selection Item” button.

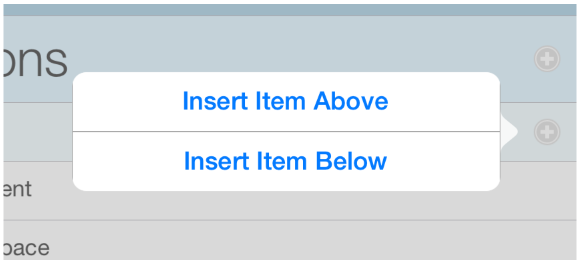

Figure 14: Choose insertion location.

3.4 Adding a Photo

Tap the "+" button to the right of any row and select "Add Photo" (Figure 15). Next, select the photo you would like to add. Photos are always added below the current row.

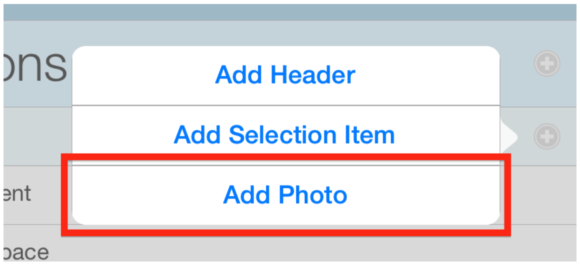

Figure 15: Tap "Add Photo" button.

3.5 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 (Figure 16).

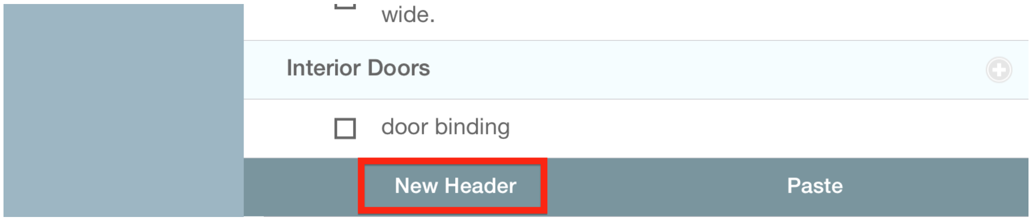

Figure 16: Tap "New Header" button.

3.6 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 Figure 17 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 (Figure 5).

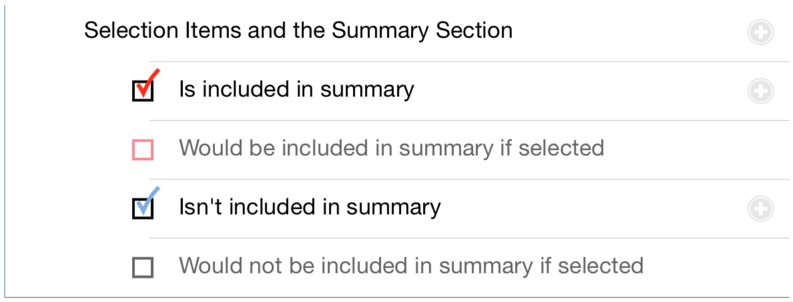

Figure 17: Red boxes and check marks indicate items that will be included in the summary section.

3.7 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 highlighted (Figure 18). A view will appear allowing you to rearrange the rows. When you are finished tap "Done" (Figure 19).

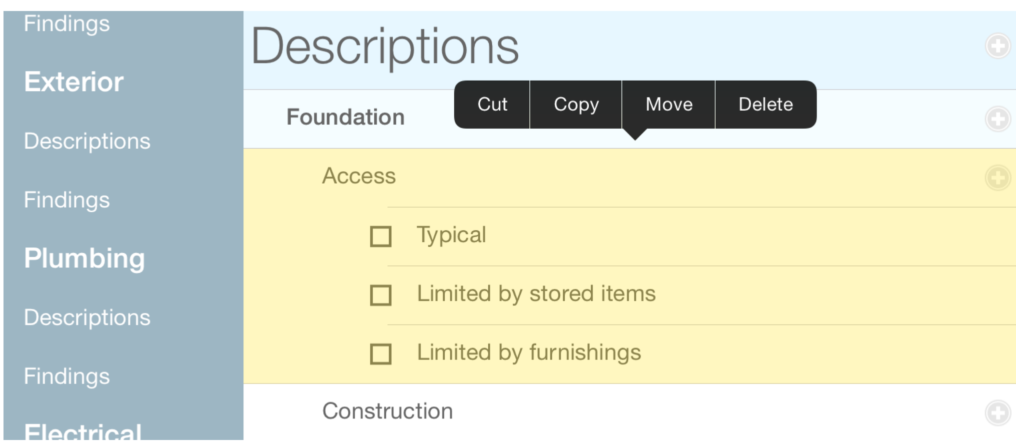

Figure 18: Highlighted rows will be moved.

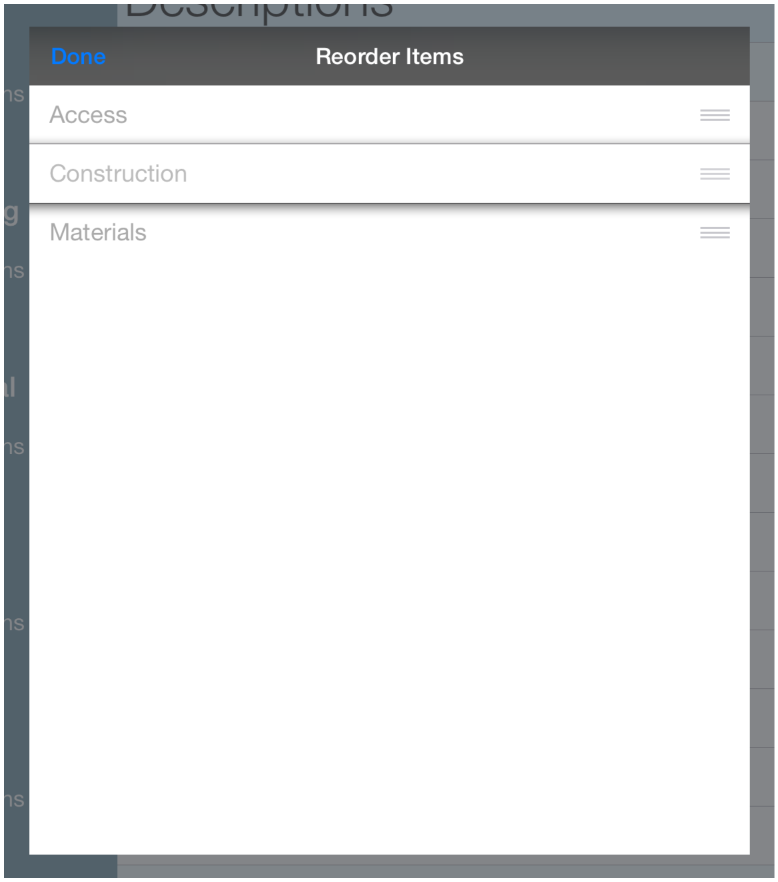

Figure 19: View for re-arranging selected rows.

3.8 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 Figure 18). Tap “Copy.”

Pasting: To paste tap the “+” button on any row and select “Paste” (Figure 20). 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.

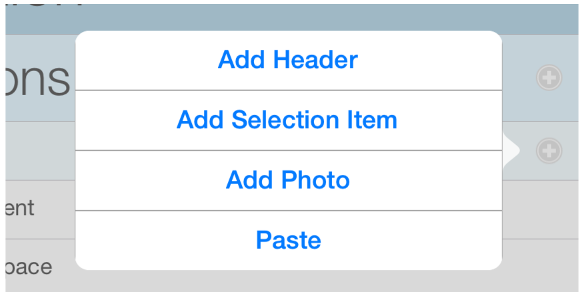

Figure 20: Select “Paste” then choose location.

3.9 Deleting a Group of Rows

While in the report editing view, drag one finger over the row you wish to move and tap “Delete” (Figure 21). 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.

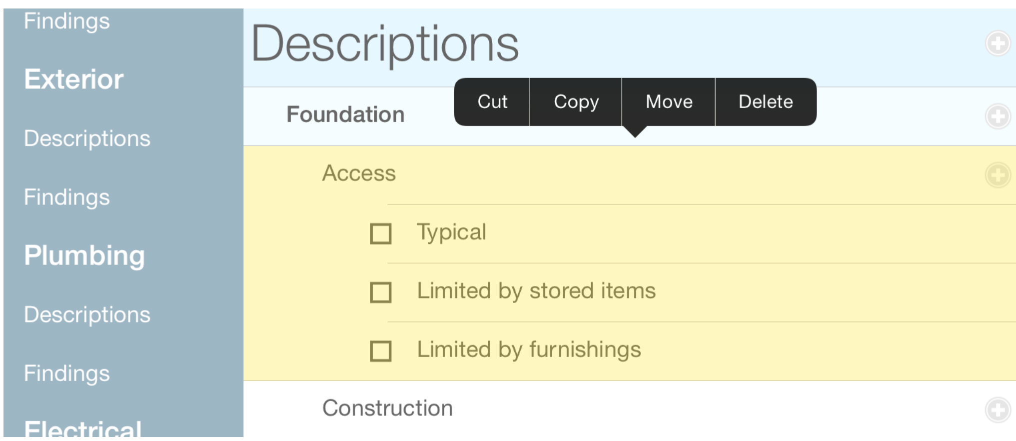

Figure 21: .

3.10 Review Mode

When you would like to review the current state of the report tap the “Review” button (Figure 22). 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.

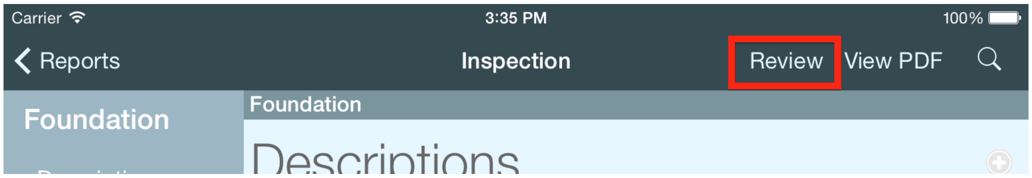

Figure 22: Tap the “Review” button to enter review mode.

3.11 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 (Figure 23). Clearing the search text field or tapping the magnifying glass again will clear the search.

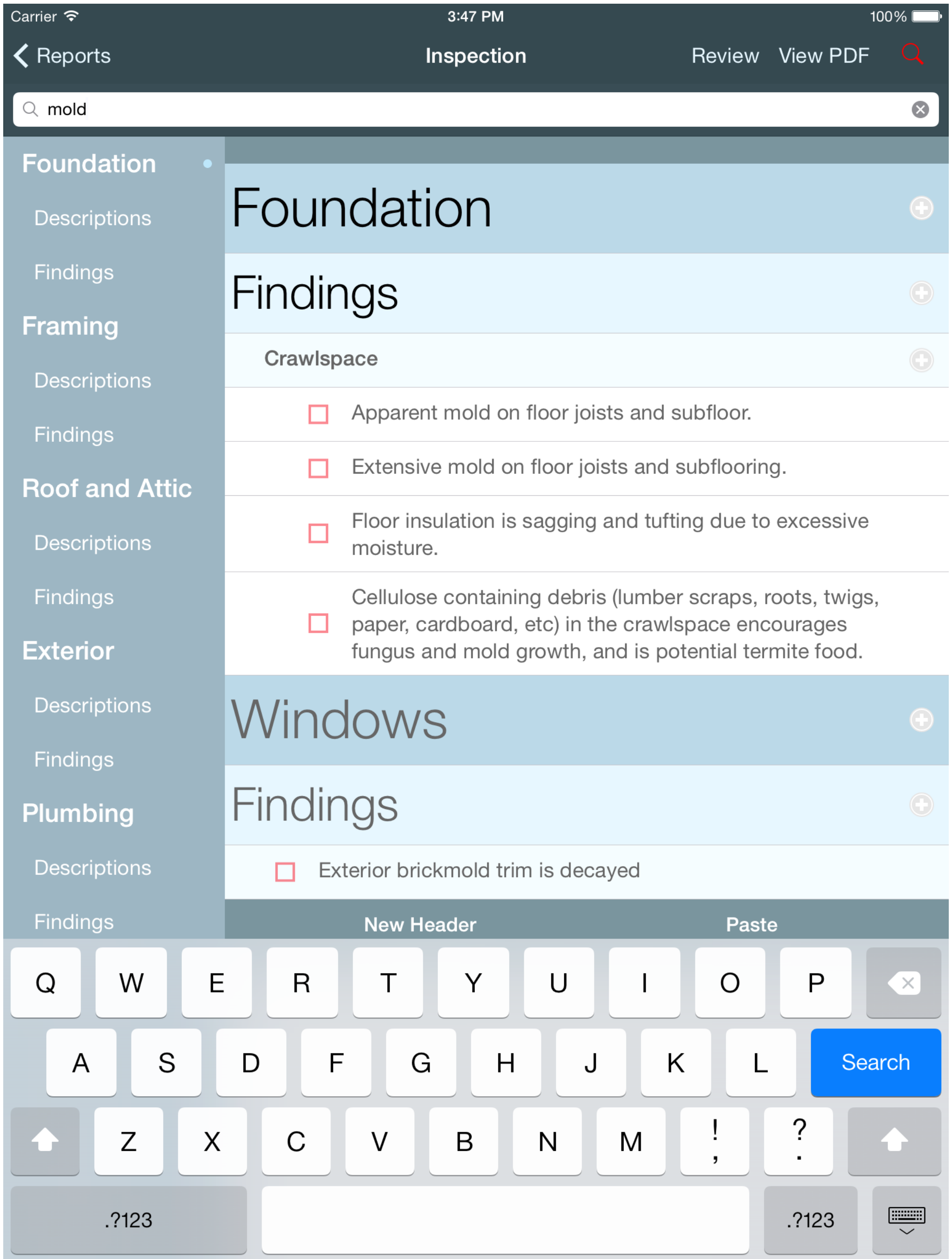

Figure 23: Tap the magnifying glass button and begin typing search text.

4 Adding Attachments

If needed, additional PDF documents can be attached to the end of the report. The attachments could, for example, be supplemental reports or agreements. To add attachments, first import a document into the Inspectix "Documents Library" using the "Open In" functionality built into iPadOS. This can be done with AirDrop, an email attachment, from the Files app, or many other methods. The document will be added to the Documents Library which is accessible via the side bar on the main screen (Figure 24). Documents in the library can be viewed by tapping on the rows or deleted by swiping rows in the Documents Library user interface.

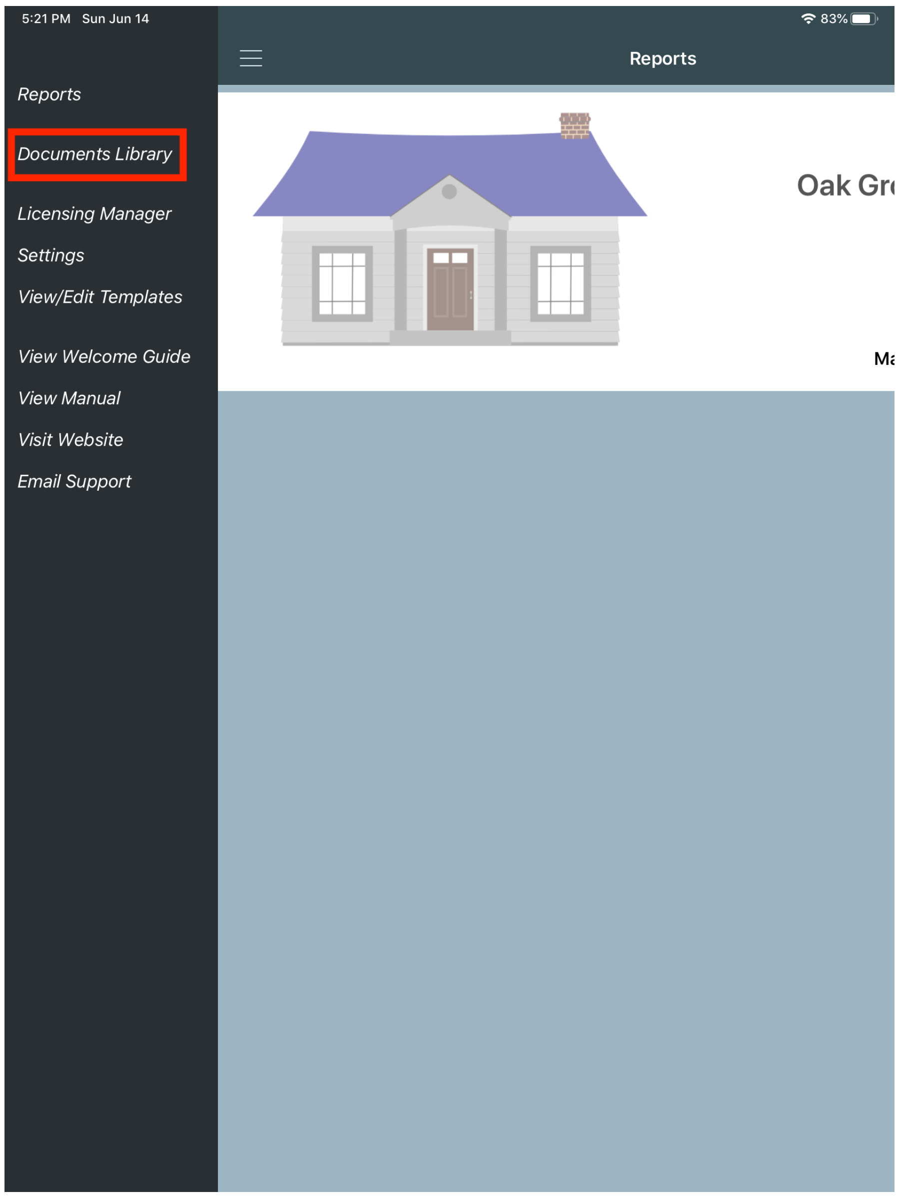

Figure 24: Tap "Documents Library" to view imported documents.

The Documents Library is a shared area where documents are stored and made available for addition to individual reports; documents added to the library are not attached to a report. Documents can be attached to individual reports by opening the “Edit Report Details" screen (Figure 4) and tapping on the “Attachments” tab. An attachment is added by tapping on the “+” button (Figure 25) and selecting a document.

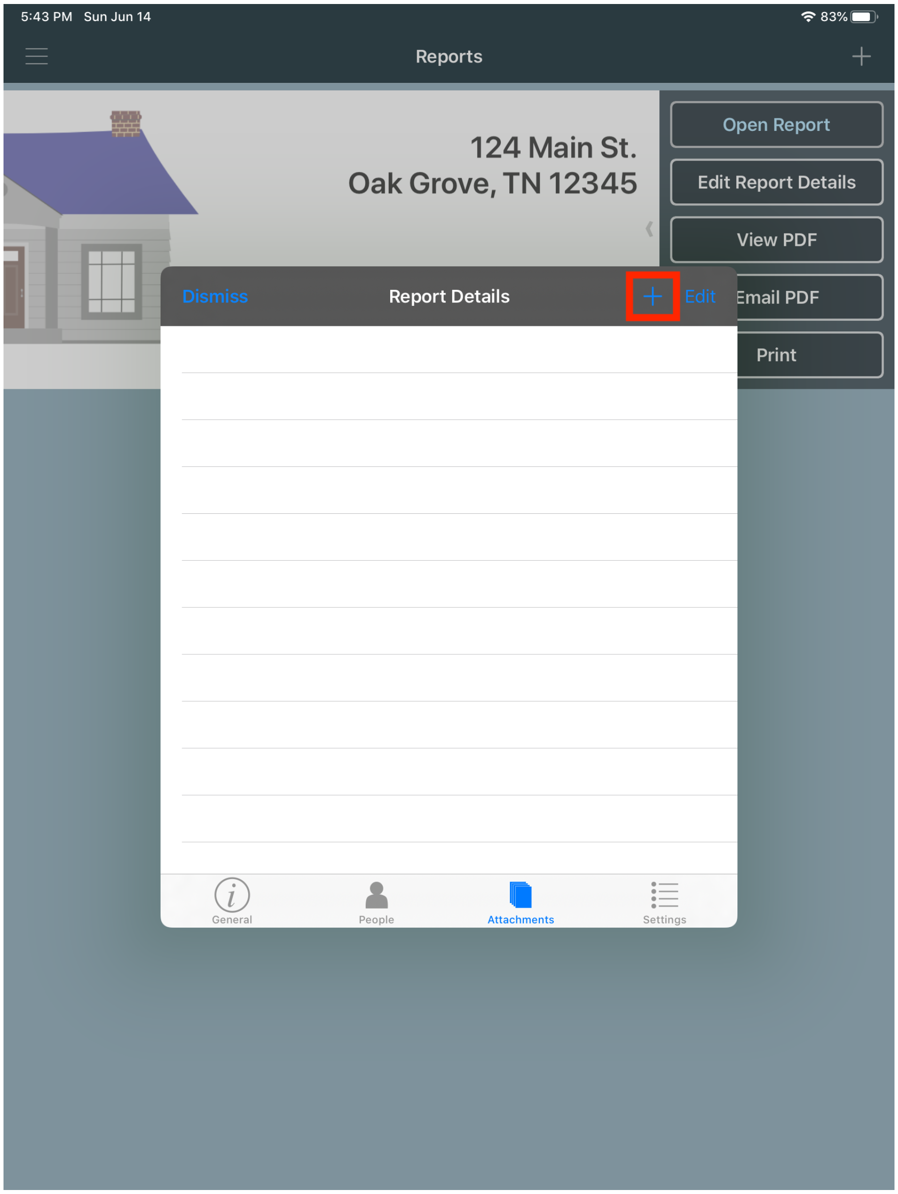

Figure 25: Tap the “+” button to add an attachment.

Inspectix gives you the option to store the document with the individual report or to use the shared document library copy. Storing the attachment with the inspection insure the document is always available even if the document library copy is deleted. This is a good option for attachments that are specific to an inspection (*e.g.*, a radon test report). Storage in the “Documents Library” is ideal for documents that are more generic in nature (*e.g.*, a home maintenance guide) and may commonly be attached to inspection reports.

Each attached documents will have a coversheet with a prefix (the default is “Attachment”), a number representing the attachment count, and lastly the filename of the attached document (without the “.pdf” extension). The prefix can be changed if desired (see Section 6.1).

5 Invoice

5.1 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 “Edit Report Details” button (see Figure 4). Scroll down to the “Invoice Info” section on the “General” tab 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 on the “Settings” tab.

5.2 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 (Figure 26). In the email form, delete the PDF for the inspection report leaving the invoice. Note, if “Include Invoice with Report” option is not selected, an invoice will not be created. To turn this on, change the setting to “on” on the “Settings” tab of the “Edit Report Details” panel (see Figure 27).

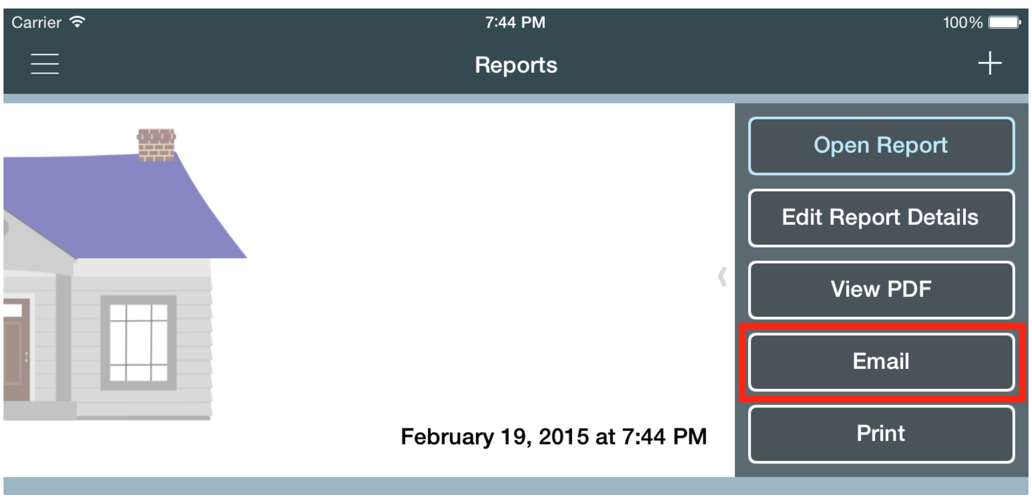

Figure 26: Tap the “Email” button.

6 Final PDF Report

6.1 Setting the PDF Report, Summary Section, and Attachment Titles

From the “Reports” screen, tap the report you wish to edit. The row will slide over revealing a column of buttons below. Tap the “Edit Report Details” button (see Figure 4). Tap the “Settings” tab and enter the title in the appropriate field (Figure 27).

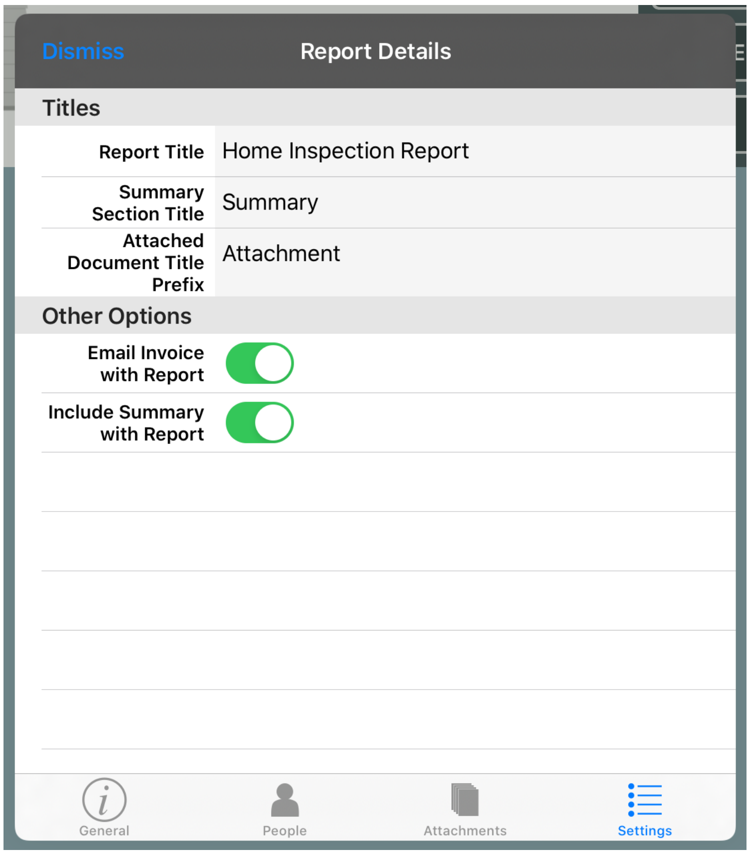

Figure 27: Enter section title.

6.2 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” (Figure 28). 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 (Figure 22).

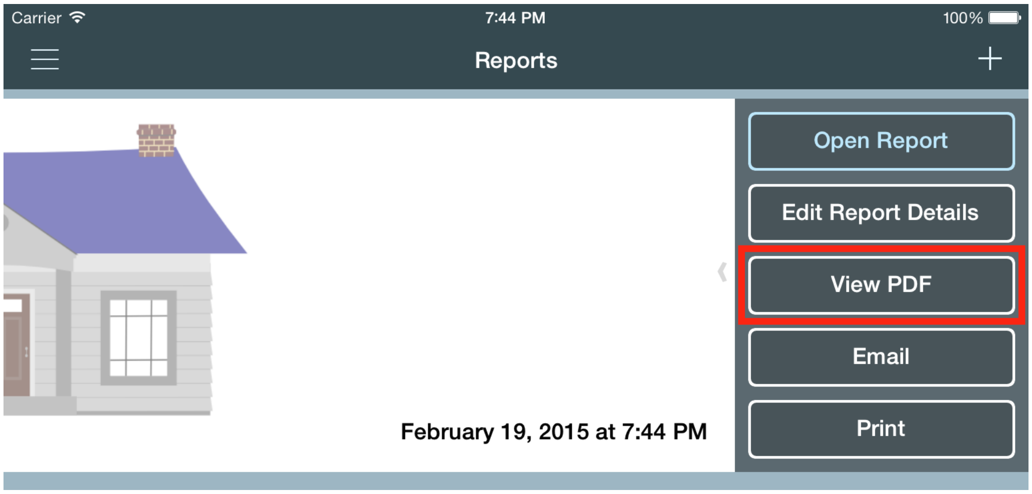

Figure 28: Tap the “View PDF” button.

6.3 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 (Figure 26).

6.4 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 (Figure 29) and a print dialogue will appear.

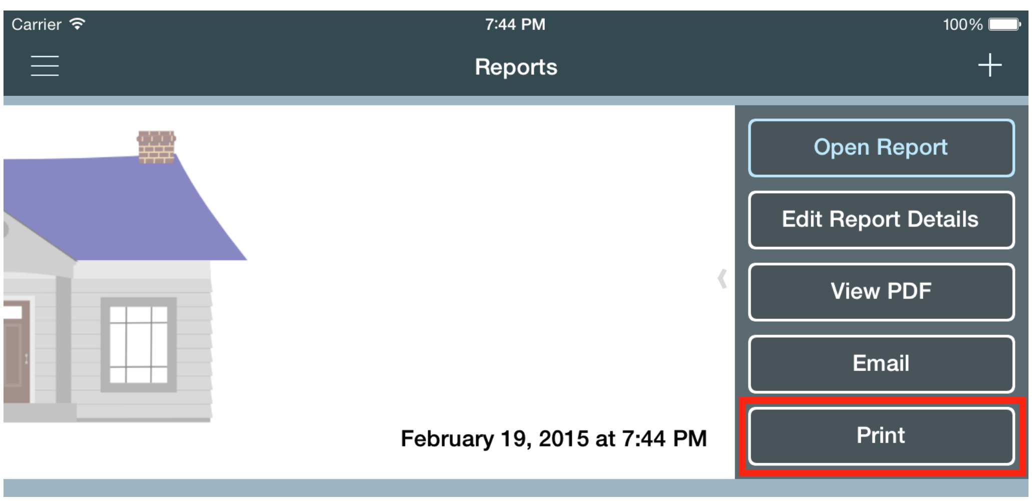

Figure 29: Tap the “Print” button.

6.5 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” (Figure 28). 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.

7 Templates

7.1 Editing a Template

Tap the button on the top left hand corner on the “Reports” screen (Figure 1). Next, tap “View/Edit Templates” (Figure 30). Choose the template you wish to edit and begin editing.

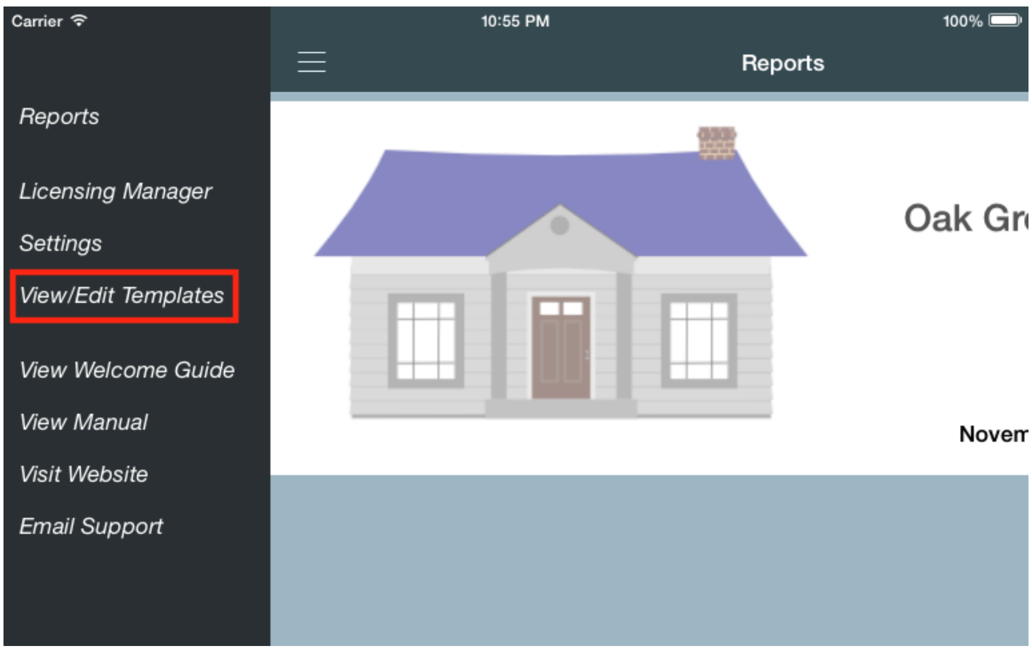

Figure 30: Tap “View/Edit Templates” button.

7.2 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 Figure 31. The highlight will not be shown for text in the final PDF report.

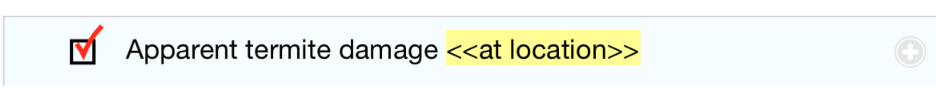

Figure 31: Text placeholder is highlighted. Tap to begin editing.

7.3 Creating a New Template

Tap "Templates" on the top bar of the "Reports" screen (Figure 30). Tap the "+" button on the pop up view. Enter a name for the new template and tap "Set" (Figure 32).

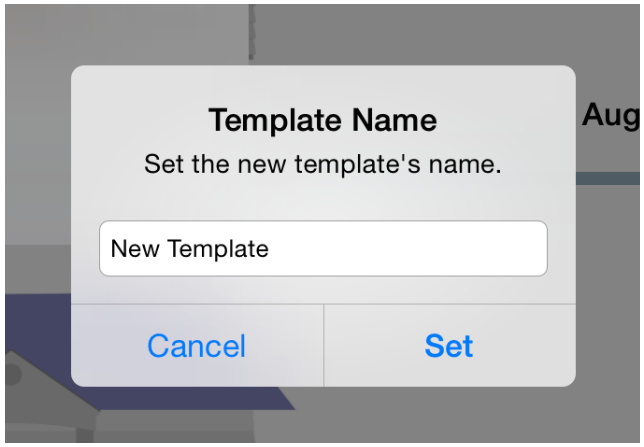

Figure 32: Type in new template's name.

7.4 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 (Figure 33). Give the new template a name and tap "Save." During the conversion, Inspectix will remove all photos and deselect all selection items.

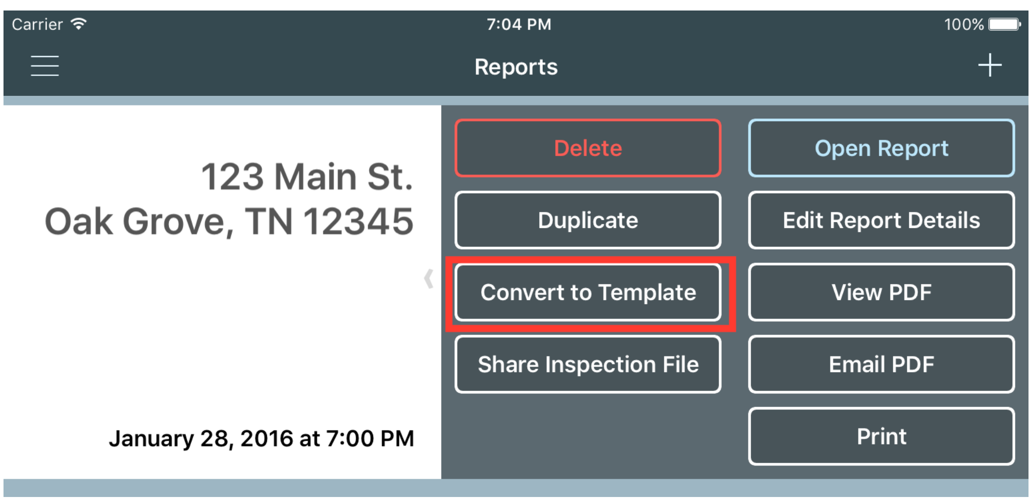

Figure 33: Tap "Convert to Template" button.

7.5 Renaming a Template

Tap the button on the top left hand corner of the reports screen (Figure 1). Next, tap "View/Edit Templates" (Figure 30). Tap the edit button (Figure 34). Tap the text on the row of the template you wish to rename and edit the text.

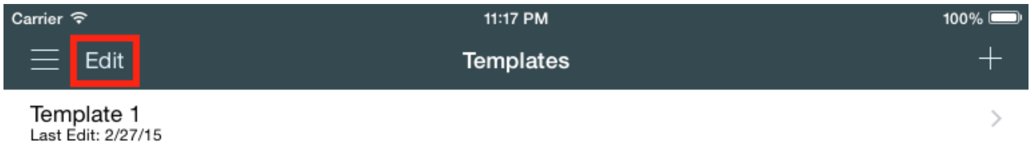

Figure 34: Tap "Edit" button.

7.6 Restoring the Original Template

You can restore the originally supplied template in a few simple steps. Tap the button on the top left hand corner of the reports screen (Figure 1). Next, tap "View/Edit Templates" (Figure 30). Tap the edit button (Figure 34). Finally, tap "Restore Original Templates" (Figure 35).

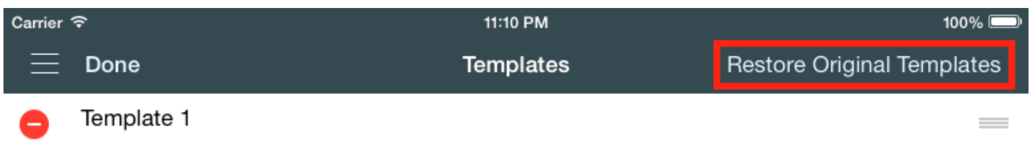

Figure 35: Tap "Restore Original Template" button.

7.7 Exporting a Template

To export a template, tap the button on the top left hand corner on the "Reports" screen (Figure 1). Next, tap "View/Edit Templates" (Figure 30). Choose the template you wish to export. When the template is on screen, tap the button in the top right hand corner (Figure 36). A popover will appear that will allow you to export the template file through a variety of methods including email, AirDrop, iMessage, and Dropbox (if installed on the device).

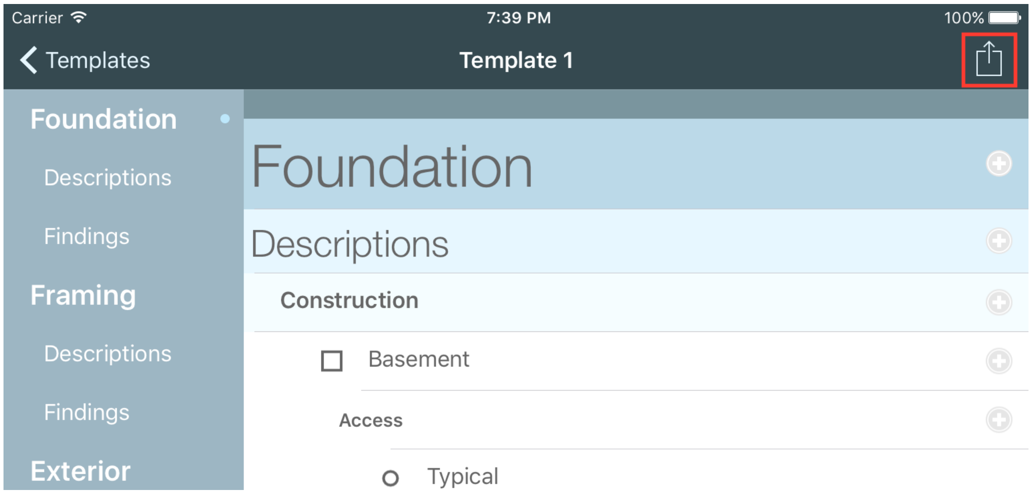

Figure 36: Tap action button.

7.8 Importing a Template File

Importing a template file is easy. This is done using the system “Open In” menu. For example, if you receive a file via email, tapping on the icon of the attachment will show you the “Open In” menu. Simply choose to open the file in Inspectix. When a template file is shared with you via AirDrop, an interface will appear allowing you to open the file in Inspectix.

8 Defaults

8.1 Setting Defaults

Inspectix settings can be accessed by tapping the button on the top left hand corner of the “Reports” screen (Figure 1) and then selecting “Settings” (Figure 37). In the view that appears the “Default Report Settings” tab allows you to specify the report’s default title, summary section title, and switches to set whether or not to include the summary section and invoice (Figure 38). Changing these settings will not alter the settings on reports that already exist. You can also choose if new selection items are automatically included in the summary section, if your email address is BCC’ed, and if the PDF of the report used two column layout.

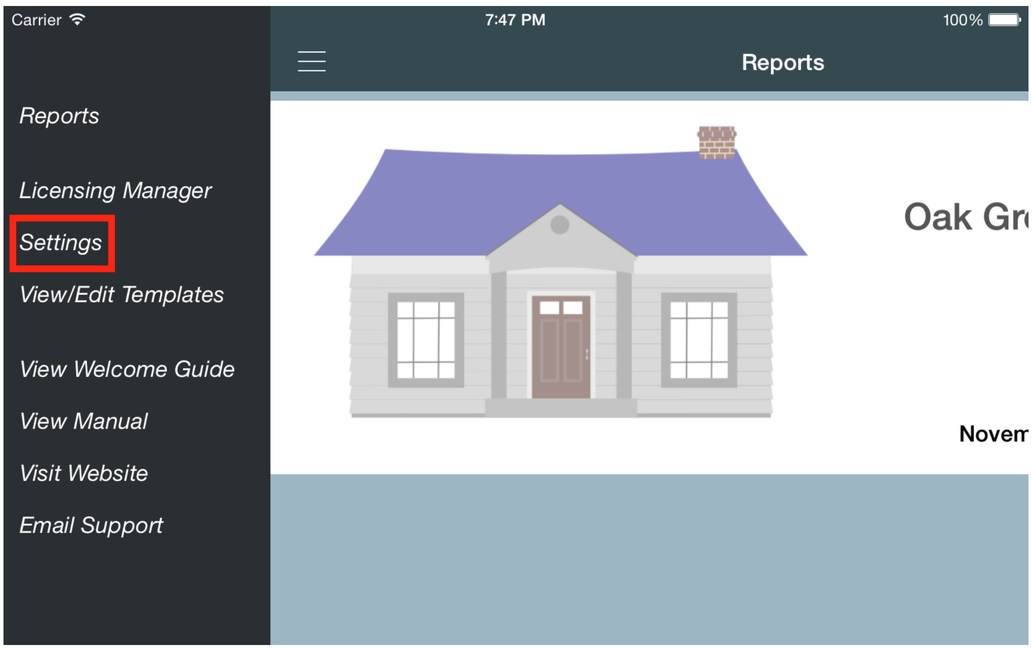

Figure 37: Tap the “Settings” button.

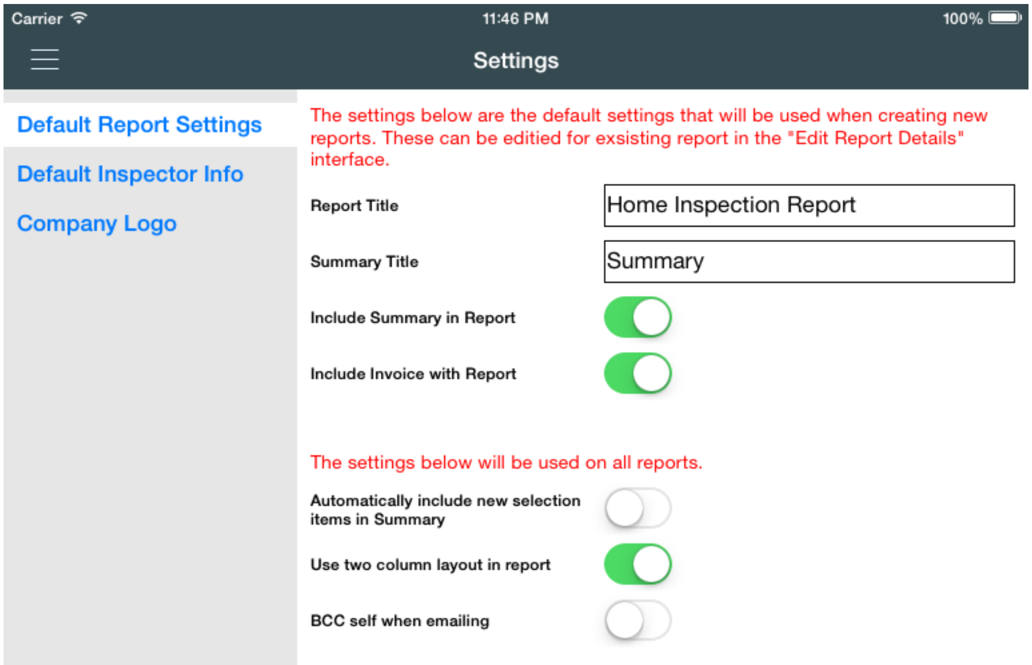

Figure 38: Default report settings.

The "Default Inspector Info" allows you to edit the default inspector's name, business name, and contact info (Figure 39). You can also add your company's logo (to be included in the pdf report) in the "Company Logo" tab (Figure 40).

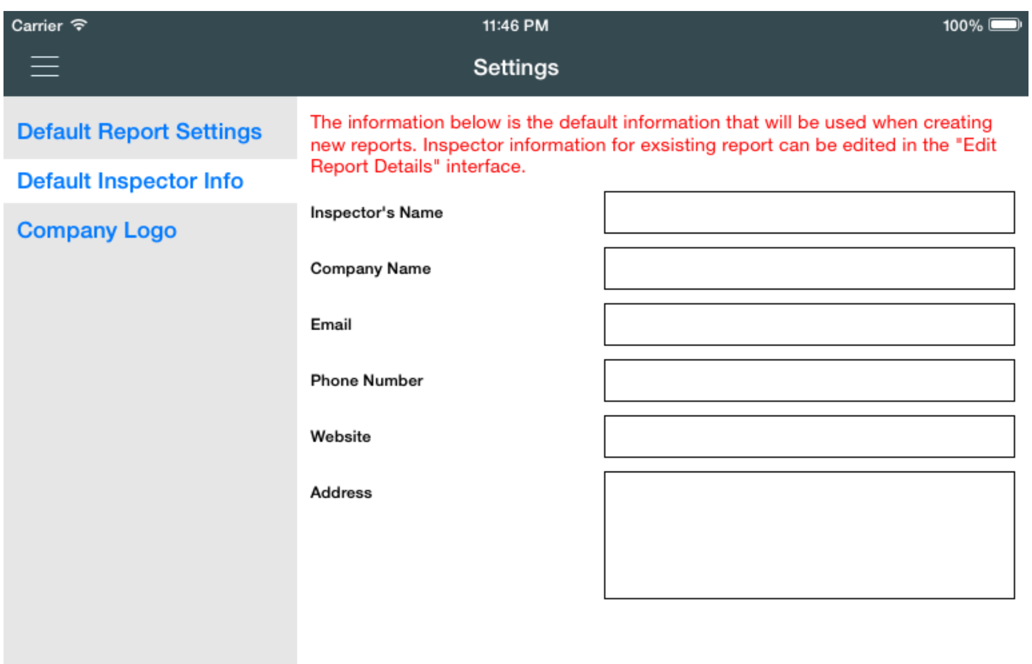

Figure 39: Default inspector info.

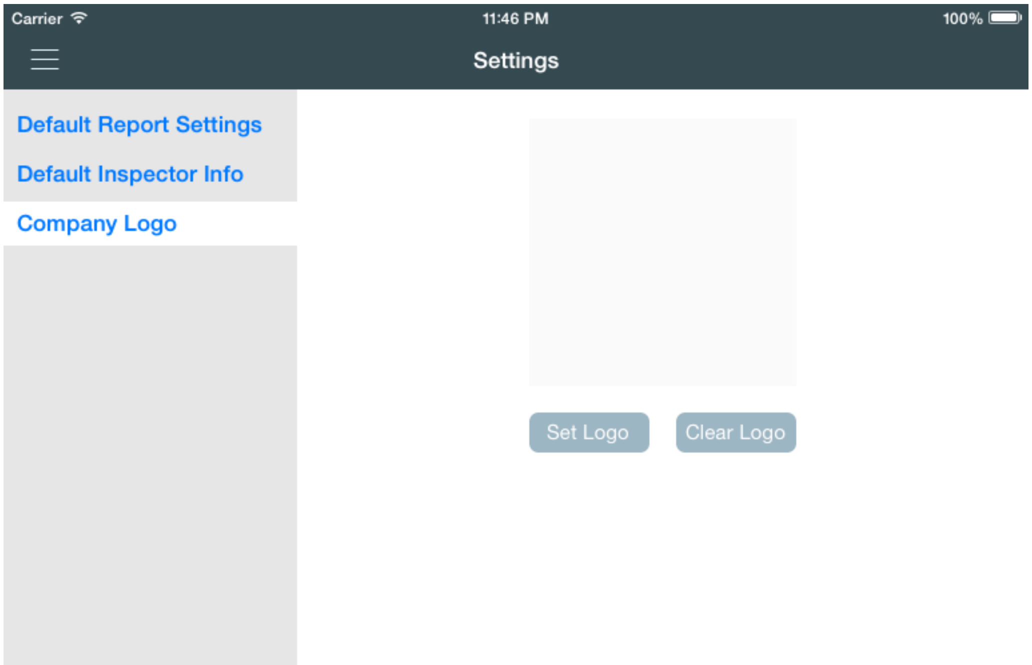

Figure 40: Set company logo.