NspectPro™

User Guide for iOS

Foreword

Any application requires some effort to learn. That is why we've tried our best to make the app user-friendly and easy to use for everyone. This user guide will assist you with a step-by-step walkthrough from start to finish your first inspection, then introduce you our advanced features so you can be one step ahead your competitors.

For first time users, we recommend starting from "Chapter 2: Get started" on page 8, which is a quick walkthrough guide from the beginning. Upon completion, you will be able to complete your own inspections and send out reports to your customers.

The rest of this user guide explore the app's features in detail and customization that could make your work easier and more efficient.

We wish you would enjoy using our product. If you have any question or feedback, please feel free to contact us at support@instaspections.com

Thank you for being a value customer,
Instaspections Team.

Contents

Chapter 1: Before you begin

1.1 Minimum requirements

Minimum iOS version	11.0
Supported Device Family	iPhone / iPod touch, iPad
Minimum disk space	60.0 MB
Supported Architectures	arm64
Required Capabilities	arm64

Table 1 - Minimum requirements

1.2 Launching the app for the first time

When the app is launched for the first time, a welcome screen (Figure 1) will appears. Select a role that most relevant to you to see what you can do with the app.

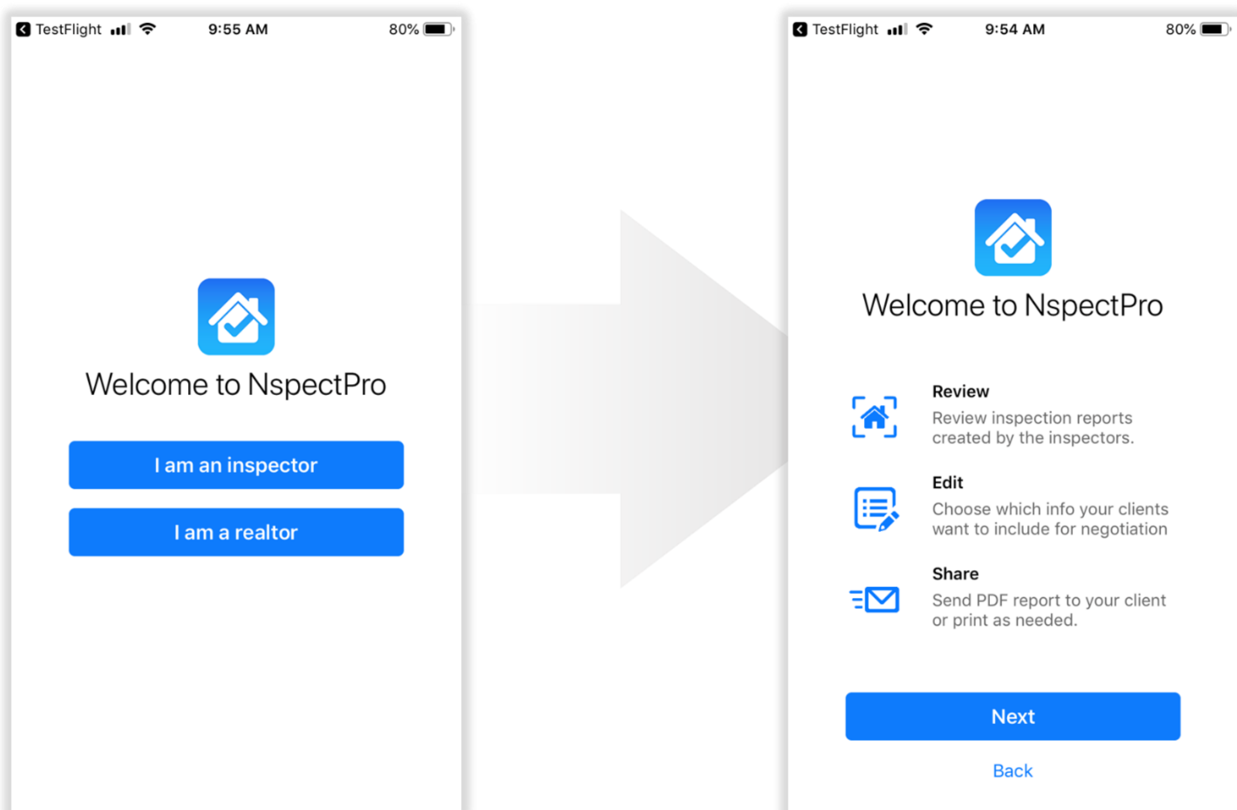


Figure 1 - Welcome screens

On the next page (Figure 2), you will be asked to sign in with your NspectPro Account. NspectPro Account keeps your user information and your subscription in one place, so you have access to your app on any device and any platform. You can skip this step by clicking “Set Up Later” or click “Next” to sign in with your NspectPro Account or to create one.

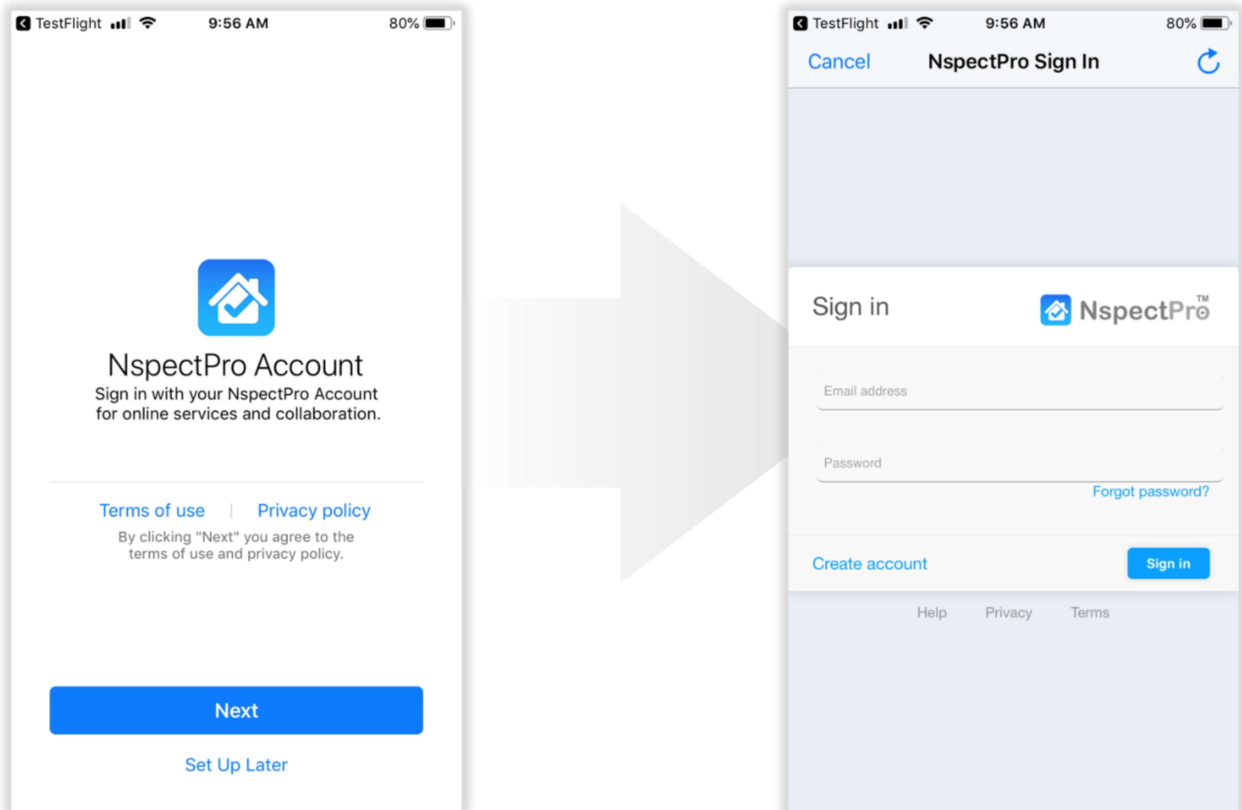


Figure 2 - Welcome screens – NspectPro Sign In

On the following page (Figure 3), you will be asked to choose a storage to save your work. To change the storage, click "**Change**" to go to the app settings. Then tap "**Storage**" under the "NspectPro Settings" section. Available options are:

1. **Local Drive** – you work will be saved locally on your device hard drive only.
2. **iCloud** – you work will be saved on your device hard drive and will be back up on iCloud storage.
3. **Google Drive** – your work will be saved on your device hard drive and will be back up on Google Drive.

Note:

- We recommend saving your work on either iCloud or Google Drive to reduce the risk of losing your data.
- If you have multiple iOS devices (iPhone, iPad, etc.), selecting "iCloud" will allow you to access the same data on any of your iOS devices.
- If you have multiple device in different platform (e.g. iPhone and Android phone), selecting "Google Drive" will allow you to access the same data on any of your device across all the platform.
- You can change storage settings at any time from your device settings. See "6.2 Switching storage" on page 37 for detail.

When done, tap the chevron at the upper left corner to navigate back to the app. Click “**Next**” to continue the setup. If “Google Drive” is selected, you will be asked to sign in to Google using your Google Account, otherwise you will be directed to the app’s home screen.

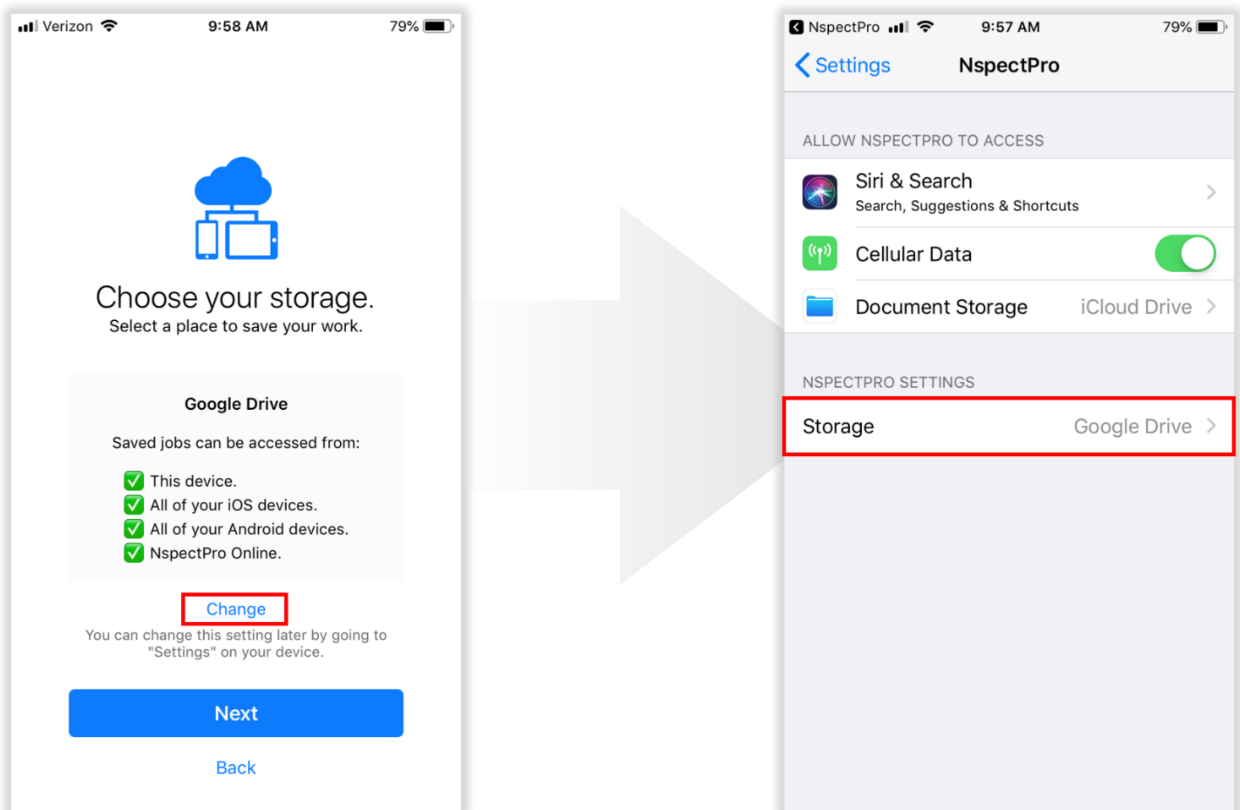


Figure 3 - Welcome screens – Storage Selection

Upon completing the initial setup, a subscription prompt (Figure 4) might show up. Please choose to perform one of the following actions.

- Choose “**Restore**” to restore previously purchased subscription if you’ve already subscribed. You can choose to restore your purchased subscription at any time. See “Restoring a purchased subscription” on page 7.
- Choose “**Subscribe**” if you don’t have any active subscription. Follow “Subscribing to a plan” on page 6.
- Choose “**Later**” to skip and continue without a subscription. App’s functionality will be limited.

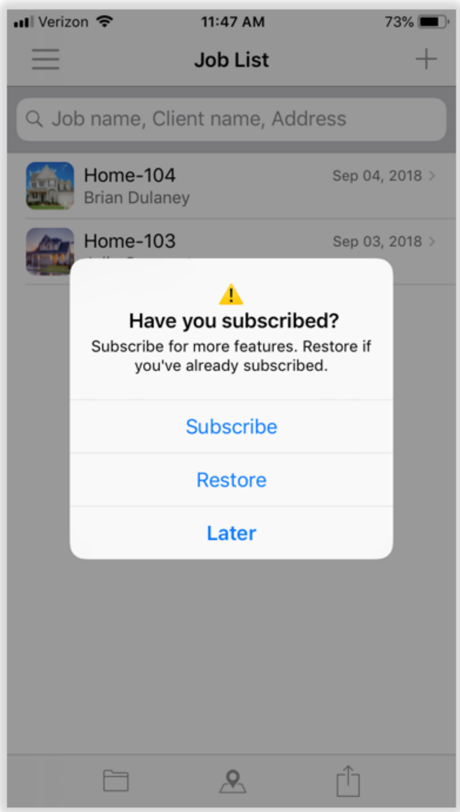


Figure 4 - Subscription missing prompt

Note: You can choose to restore or change your subscription plan at any time from the subscription window within the app. See "1.3.2 Managing subscriptions" on page 5 for detail.

1.3 Subscription

1.3.1 Subscription plans

The app offers several subscription plans for users who would like to use additional features. Plan detail and pricing are subject to change at any time. Please visit our website at http://www.nspectpro.com for the current plans & pricing.

1.3.2 Managing subscriptions

To manage the subscriptions, click menu button at the upper left corner of home screen. Under "**Settings**" category, select "**Subscription**" to open a subscription window.

> **Note**: Internet connection (cellular data or Wi-Fi) is required to manage the subscription.

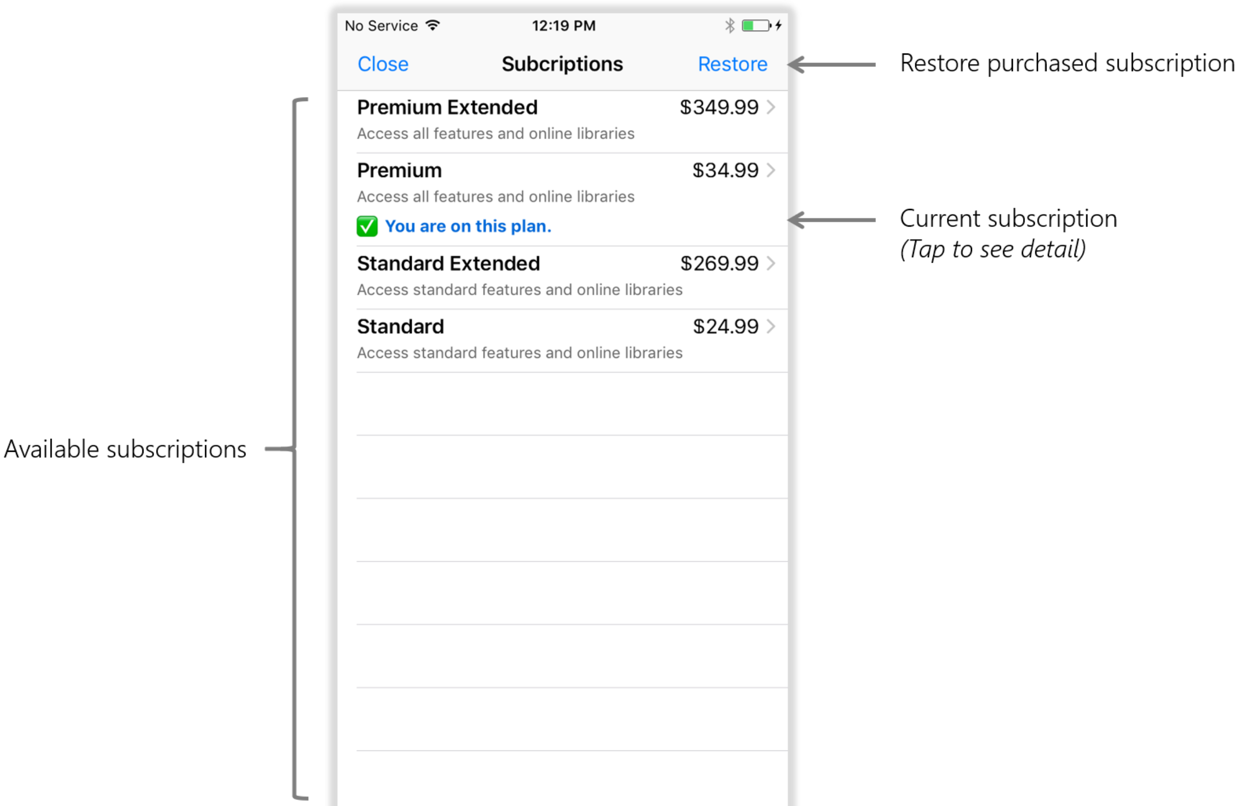


Figure 5 – Subscription window

Subscribing to a plan

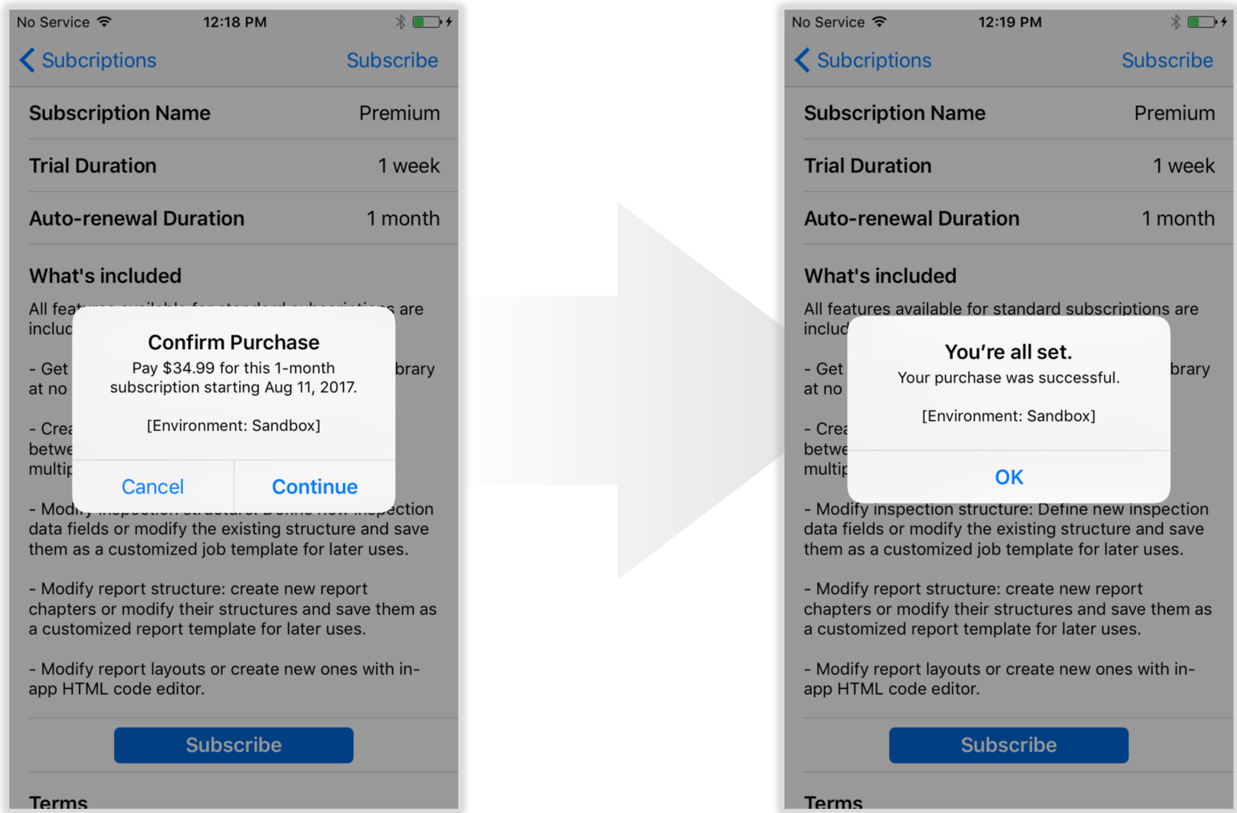


Figure 6 - Subscribe to a plan

1. Tap any row to see more detail about the subscription.
2. Click "**Subscribe**" button to subscribe. The request will be sent to the server. This may take a few seconds to a minute depends on the internet speed.
3. Once the connection has been established, a dialog box will show up. Follow the instructions on the screen. You may be asked to sign in to iTune Store during the process.
4. Once the purchase transaction is completed, a checkmark with text "You are on this plan" will be shown under the subscription plan you've purchased.

Changing the subscription plan

1. Tap any subscription you would like to switch to from the available subscription list. Then click "**Subscribe**".
2. The request will be sent to the server. This may take a few seconds to a minute depends on the internet speed.
3. Once the connection has been established, a dialog box will show up. Follow the instructions on the screen. You may be asked to sign in to iTune Store during the process.
4. Once the purchase transaction is completed, a checkmark with text "You are on this plan" will be shown under the subscription plan you've purchased.

Note:

- **Upgrading the subscription:** If you are changing from any lower-level subscription to any higher-level subscription (such as changing from standard to premium), your new subscription will begin right away. You will be billed on new subscription and you will receive a refund for the remanding time of your previous subscription.
- **Downgrading the subscription**: If you are changing from any higher-level subscription to any lower level subscription (such as changing from premium to standard), your new subscription will begin after your current subscription expires. You will be charged for your new subscription when it is started.

Restoring a purchased subscription

If you've subscribed to any plan and recently reinstalled the app or you have installed the app on another device for a first time, you can choose to restore your purchased subscription. To restore your purchased subscription, do the following:s

1. Tap "**Restore**" button at the upper right corner of the Subscription window.
2. When prompted, click "**Restore**" to confirm the action. The app will communicate with server to retrieve a purchase history. This might take a few minutes depending on the internet speed.
3. Once the restoring is completed, a checkmark with text "You are on this plan" will be shown under your current active subscription. You will be prompted, however, if you don't have any active subscription or your previously purchased subscription has already expired.

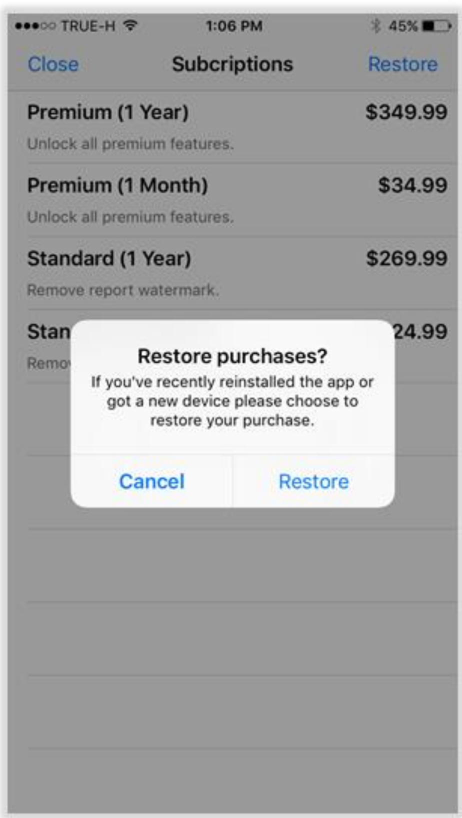


Figure 7 - Restoring purchases

Chapter 2: Get started

This chapter explores the app main features, covering from creating a new job to printing out and share reports. After you have completed this section, you should be able to use the app to complete your inspection!

To begin with, the inspection process can be divided into three main steps; first, create a job, then inspect the property, after that generate a report and share (Figure 8). See the following topics to get started.

Figure 8 - Inspection process

2.1 Create a job

2.1.1 Home screen

At home screen, you can browse, open or manage all your previously saved jobs.

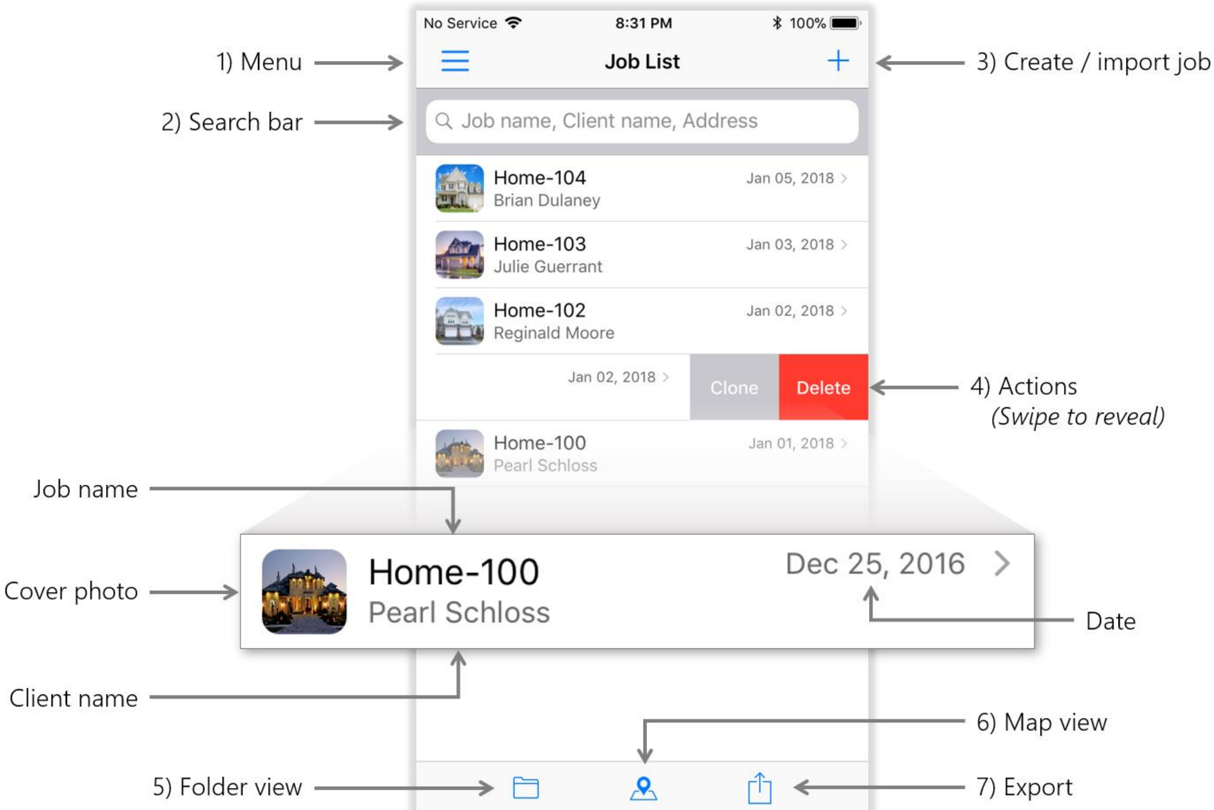


Figure 9 - Home screen

1. **Menu:** Access to subscription (page 5), app preferences (page 62), user guide and more.
2. **Search bar:** Filter for specific jobs you are looking with keywords. See "Job list with search bar" on page 29.
3. **Create / import job:** Create a new job or import saved job from file.
4. **Actions:** Swipe to reveal options: "Clone" or "Delete" selected job.
5. **Folder view:** Filter and display jobs by month. See "Folder view" on page 30.
6. **Map view:** View saved jobs on the map. See "Map view" on page 31.
7. **Export:** Export all jobs in the list to a spreadsheet (CSV) to be used in MS Excel, Google Sheet, etc.

Next step - Create a new job: click "**+**" on the upper right corner and select "**New Job**…". Go to "2.1.2 Create a job" on page 10.

2.1.2 Create a job

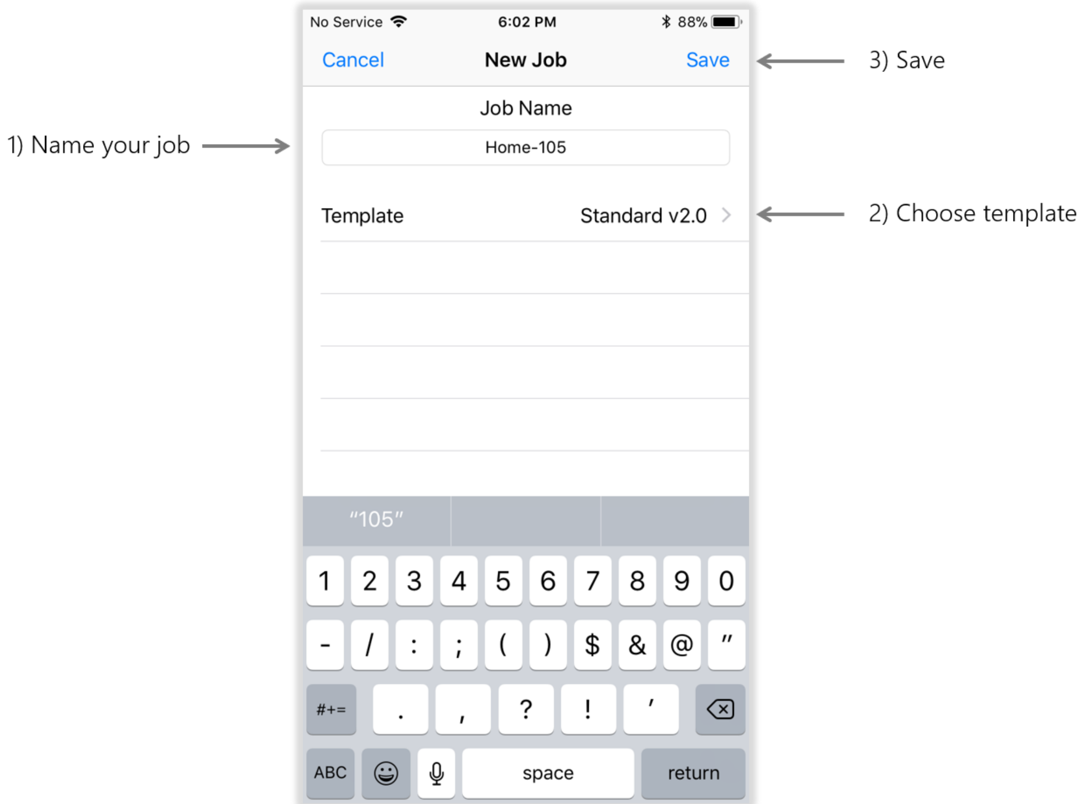


Figure 10 - Add new job window

To create a new job, perform the following steps:

1. **Name your job**
   Type a name or ID that refer to the job. For example, "Job1" or "A17-001". Job name will be displayed on the job list, when you search, and on the report's cover page.
2. **Choose a template**
   Tap to select your preferred template. Each template contains different inspection data.
3. **Save**
   Click "**Save**". Your new job will be added to the job list on your home screen.

Next step:

Fill in job detail - at home screen, tap any row to open the job. Go to "2.1.3 Fill in job detail" on page 11 to learn how to add job detail.

2.1.3 Fill in job detail

On this window, you can fill in job details including property address, client info, payment method, picture of the property and more.

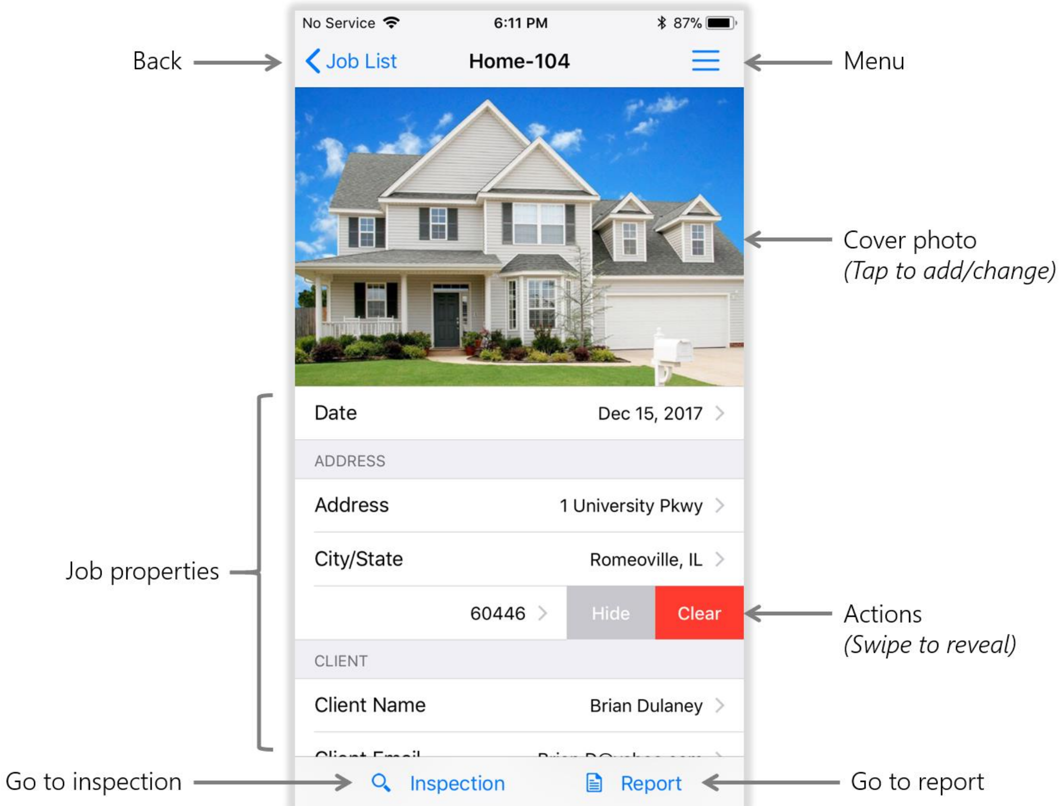


Figure 11 - Job window

1. **Cover photo**
   A photo that will appear on your report cover page. Tap to add/change.
2. **Job properties**
   Information to be displayed in the report such as client info, site info and payment information. Tap to insert or change. Swipe for more actions; "Hide" omits the selected data from showing in the report, "Clear" removes the stored data.
3. **Menu**
   Perform actions i.e. change job name, modify job properties (page 67), save job as a template (page 63), and export job (page 32).
4. **Go to inspection**
   Tap to open inspection window. See "2.2 Inspect the property" on page 14.
5. **Go to report**
   Top to open report window. See "2.3 Generate a report" on page 22.

Add / change / remove cover photo

1. Tap photo then choose a source to pick a new photo from:
    a. **Library** – select saved photo from your camera roll.
    b. **Camera** – take a new photo using your front camera.
2. Redo step 1 to change the existing photo, or tap the photo and select "**Delete**" to remove the existing photo.

Fill in job properties

1. Tap any job properties to open editing window.
2. Fill in information or change the existing one. Click "**Save**".
3. Redo step 1 to edit the existing information or swipe the row to the left and click "**Clear**" to remove existing data.

Tips: Address, City/State and Zip code can be auto-filled. To apply autofill, tap menu button on the upper right corner and choose "**Autofill address**". Properties will be filled based on your current location provided by your device's GPS.

Add client signature

Client signature will be added to the final report on the agreement page side by side with inspector signature (if any). To add a client signature:

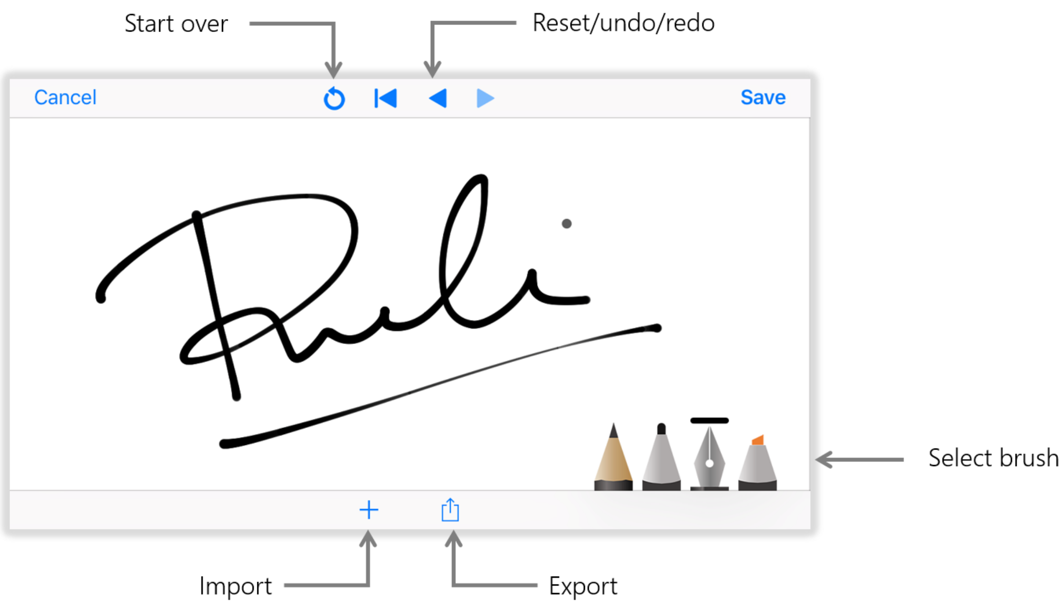


Figure 12 - Signature editor

1. Scroll down and click the "**Client Signature**" row to open signature editor.
2. Select a brush and sign, or click "**+**" to import existing signature image file from your camera roll.
3. Click "**Save**".

Tips:

- You can change brush size, color or opacity by clicking the selected brush to open brush settings.
- To completely remove the signature, go back to job window then swipe the "**Client Signature**" row to the left, then select "**Clear**".

Rename job

1. Click the menu button on the upper right corner, and select "**Change Name**".
2. Type a new name, click "**Save**".

Next step:

Inspect the property - Now it's time for the inspection! At job window, tap "**Inspection**" button to open the inspection window, showing available systems for your inspection. Go to "2.2 Inspect the property" on page 14.

2.2 Inspect the property

Inspection data is stored in hierarchical structures; systems, items and objects respectively. Each structure level contains inspection properties and values. The inspection is done by selecting the relevant systems, items and objects from the template list you have chosen earlier. See "Chapter 7: How the app works" on page 40 to learn more.

2.2.1 System list

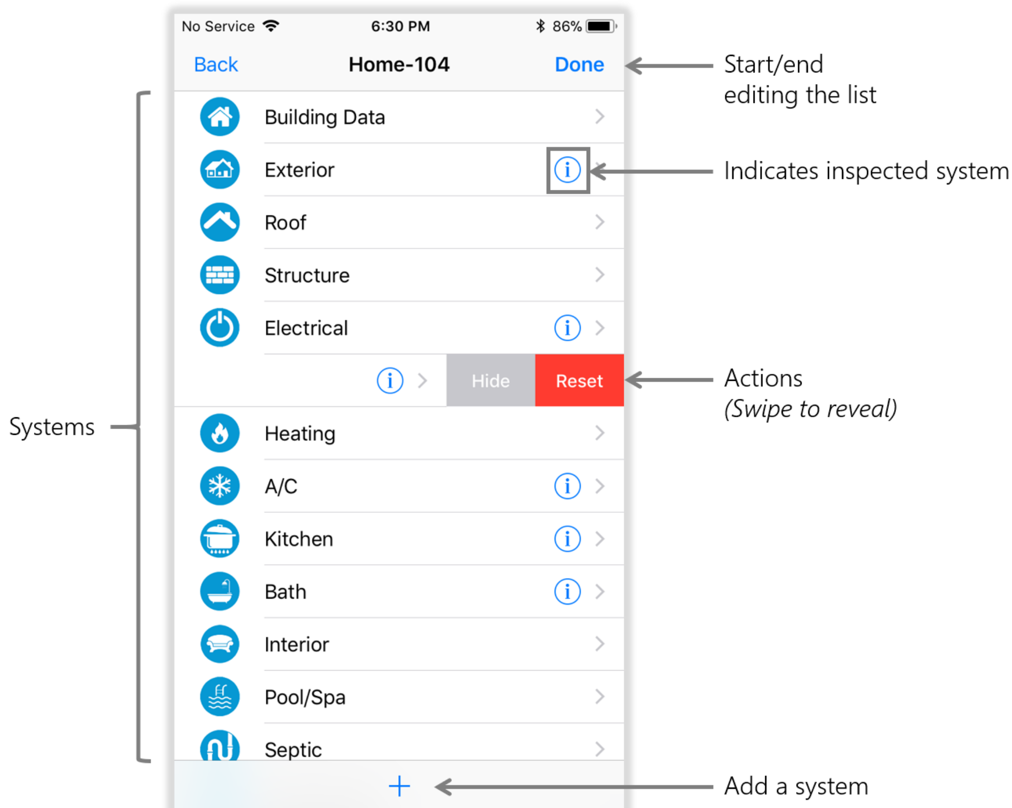


Figure 13 - Inspection window

1. **Systems**
   Each system contains a group of inspection items. Those already inspected are marked with disclosure indicator [!]. Swipe to reveal actions; "Hide" omits the selected data from showing in the report. "Reset" removes all stored data.
2. **Edit button and Add button**
   Customize the system list. See "8.1 Customizing system list" on page 44.

Next step:

Select a system to be inspected - at inspection window, tap the system you would like to inspect. This will open a system window, showing detail of the selected system. Go to "2.2.2 Item list" on page 15.

2.2.2 Item list

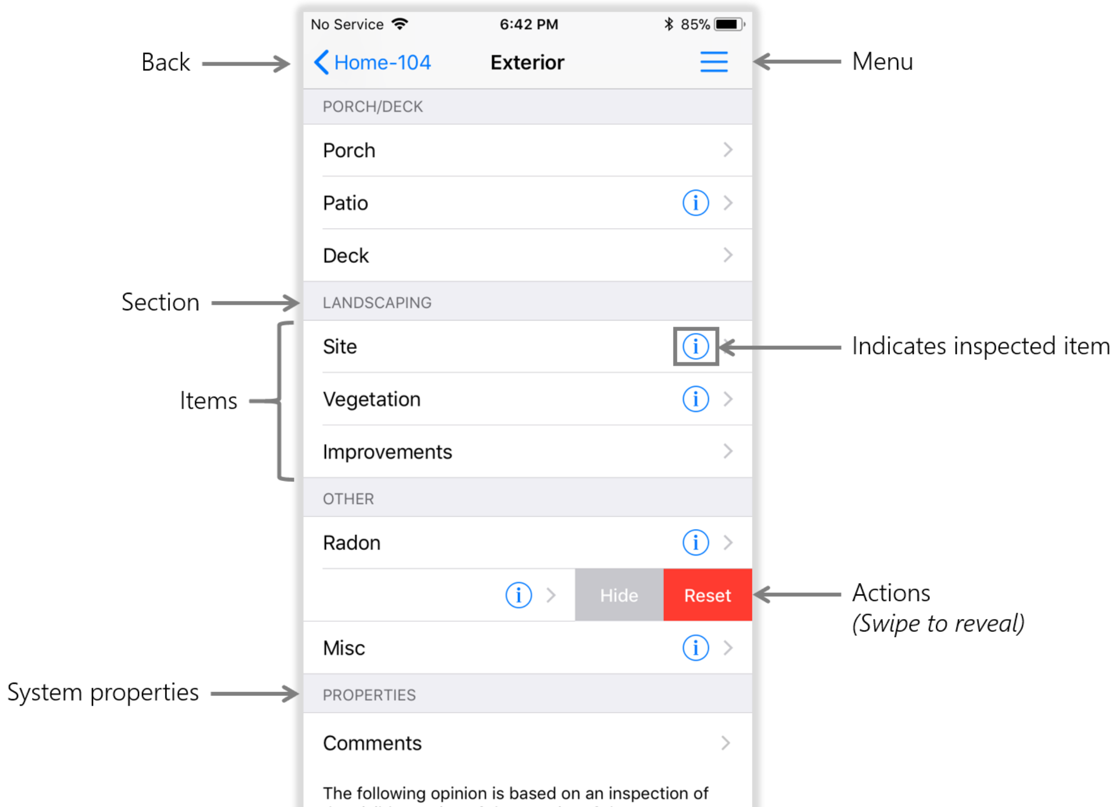


Figure 14 - System window

1. **Sections**
   Each section contains items of the same category.
2. **Items**
   Each contains inspection data such as photos, conditions and ratings. Items that are inspected are marked with disclosure indicator [!]. Swipe any row to reveal actions; “Hide” omits the selected data from showing in the report, “Reset” removes all stored data.
3. **System properties**
   Additional information to be displayed in the report under the selected system. “Comments” is a default system property. Tap to add/change information.
4. **Menu**
   Perform actions i.e. change system name, modify system (page 70) and system properties (page 70).

Fill in system properties

1. Tap a system property to open editing window.
2. Fill in information or change the existing one, then click "**Save**".
3. Redo step 1 to edit the existing information or swipe the row to the left and click "**Clear**" to remove existing data.

Rename system

1. Click the menu button on the upper right corner and select "**Change Name**".
2. Update following information.
    a. **Name** - type a new name.
    b. **Subtitle (optional)** – will be shown just below the name (useful as a translation of foreign languages) but will not be shown in the final report.
3. Click "**Save**".

Next step:

Select an item to be inspected - at system window, tap any item to open item window, showing detail of the selected item. Go to "2.2.3 Inspecting item (part 1" on page 17.

2.2.3 Inspecting item (part 1)

This window shows detail of the selected item, including types and conditions of the item, and additional properties such as ratings, cost and comments.

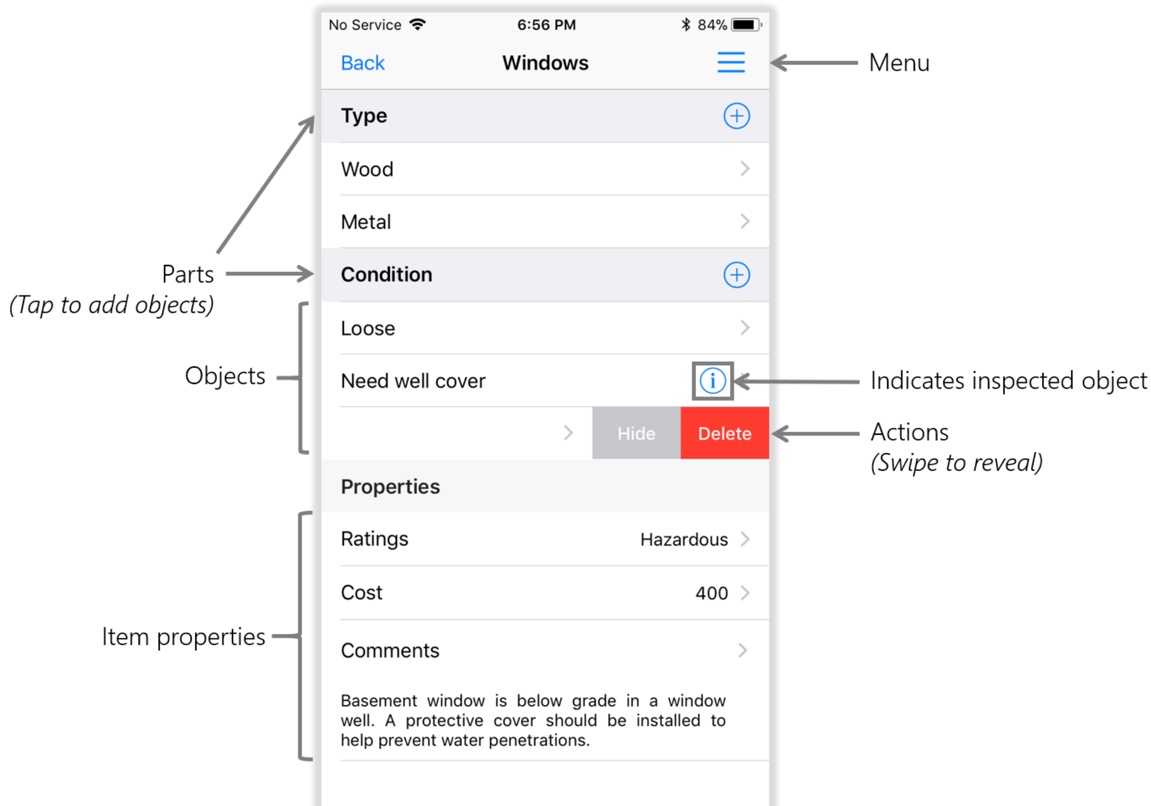


Figure 15 - Item window

1. **Parts**
   A part contains a group of objects. “Type” and “Condition” are default parts. Tap to add new object to the list.
2. **Objects**
   Each contains inspection data such as photos, conditions and ratings. Inspected objects are marked with disclosure indicator [!]. Swipe to reveal actions; “Hide” omits the selected data from showing in the report, “Delete” removes the object from the list.
3. **Item properties**
   Additional information to be displayed in the report under the selected item. “Rating”, “Cost”, and “Comments” are default item properties. Swipe to reveal actions. Tap to add/change the value.
4. **Menu**
   Perform actions i.e. change item name, edit added objects, edit object group (page 74) and modify item properties (page 72).

Add Object

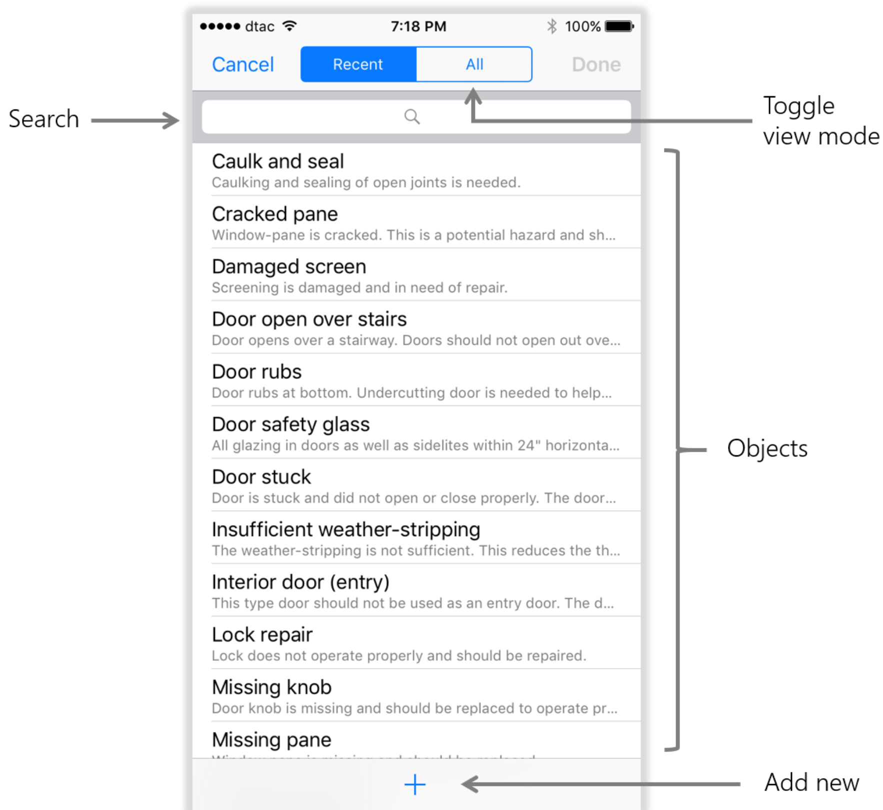


Figure 16 - Object list window

1. Tap any object group you wish to add a new object to. An object list window will pop up, showing available objects under the selected group.
2. Tap to select object(s) to be added.
3. Click “**Done**” to close the window.

> **Note**: You can create custom objects and add them to the list. See “8.2 Customizing object list” on page 45.

Remove Object

1. Swipe the row you wish to remove to the left to reveal actions. Click “**Delete**”.

Reorder Objects

1. Click the menu button on the upper right corner, and select “**Edit Added Objects**” to enter editing mode.
2. Press and hold button on the right of object you wish to reorder. Drag the row up and down to reorder.
3. Click “**Done**” on the upper right corner of the screen to leave editing mode.

Fill in item properties

1. Tap any item properties to open editing window.
2. Fill in information or change the existing one, then click “**Save**”.
3. Repeat step 1 to edit the existing information or swipe the row to the left and click “**Clear**” to delete the existing data.

Rename item

1. Click the menu button on the upper right corner, and select “**Change Name**”
2. Update following information
   a. **Name** - type a new name
   b. **Subtitle (optional)** – will be shown just below the name (useful as a translation of foreign languages) but will not be shown in the final report.
3. Click “**Save**”

Next step:

Fill in object detail - at item window, tap any object to open object window, showing detail of the selected object. Go to “2.2.4 Inspecting item (part 2” on page 20.

2.2.4 Inspecting item (part 2)

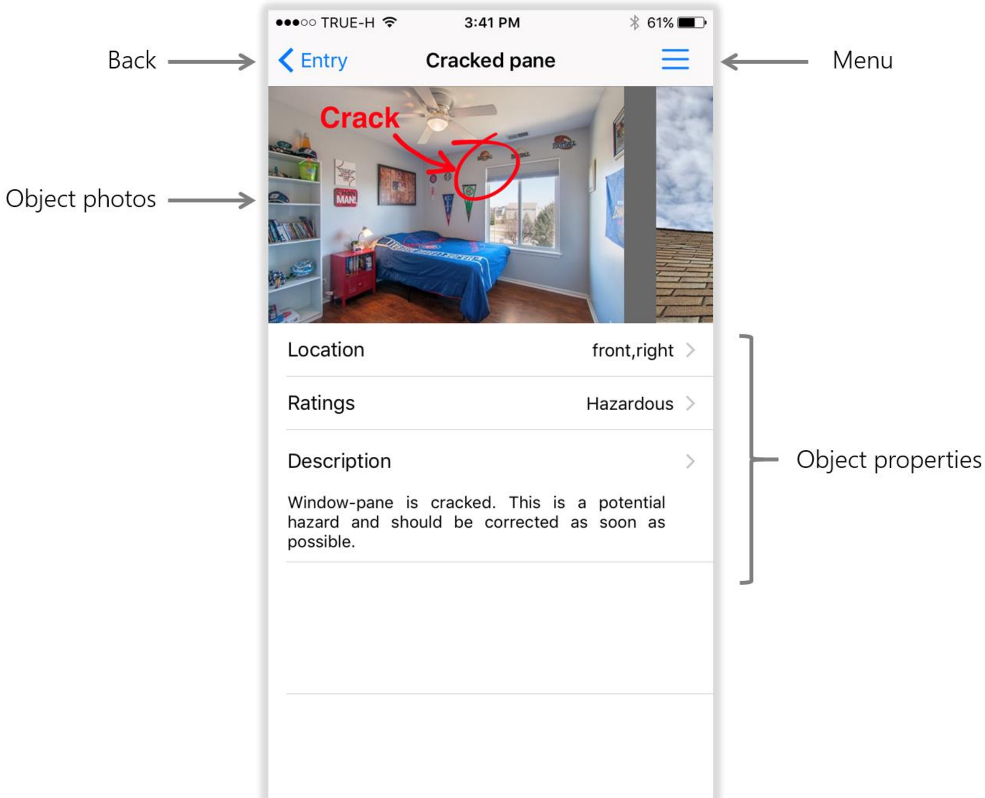


Figure 17 - Object window

1. **Back button**
   Go back to previous window (item window).
2. **Object photos**
   Photo(s) that will appear in the report. Tap to add/change/edit.
3. **Object properties**
   "Location", "Ratings", and "Description" are default properties. Swipe to reveal actions. Tap to add/change information to be displayed in the report.
4. **Menu**
   Perform actions i.e. change object name, save object to list (page 46) and modify object properties (page 75).

Add/Change photo

1. Tap the photo then select source between "**Library**" or "**Camera**"
    a. **Library** – select saved photo from your camera roll.
    b. **Camera** – Take a new photo using your front camera.
2. Select a photo from the library or take a new photo then click "**Use photo**".
3. Redo step 1 to change the existing photo, or tap the photo and select "**Delete**" to remove the existing photo.

Add more photos

1. To add another photo, slide the existing photo all the way to the left until "**add photo**" icon is reveal.
2. Tap the icon to add another photo.

Draw on photo

1. Tap the photo then select "**Edit Photo**" to open photo editor.
2. Select color and draw on photo as desire.
3. Click "**Save**" when done, or click "**Reset**" to start over.

See also: learn more about using photo editor - "Chapter 3: Using Photo Editor" on page 27.

Fill in object properties

1. Tap any object properties to open editing window.
2. Fill in information or change the existing one.
3. Click "**Save**".
4. Redo step 1 to edit the existing information or swipe the row to the left and click "**Clear**" to delete existing data.

Rename object

1. Click the menu button on the upper right corner, and select "**Change Name**"
2. Update following information
    a. **Name** - type a new name
    b. **Subtitle (optional)** – will be shown just below the name (useful as a translation of foreign languages) but will not be shown in the final report.
3. Click "**Save**"

Next step

- **Complete inspection** - Repeat the process from "2.2 Inspect the property" on page 14 for every systems and items until your inspection is completed.
- **Generate report** - At job window, click "**Report**" button to start creating a report. Continue "2.3 Generate a report" on page 22.

2.3 Generate a report

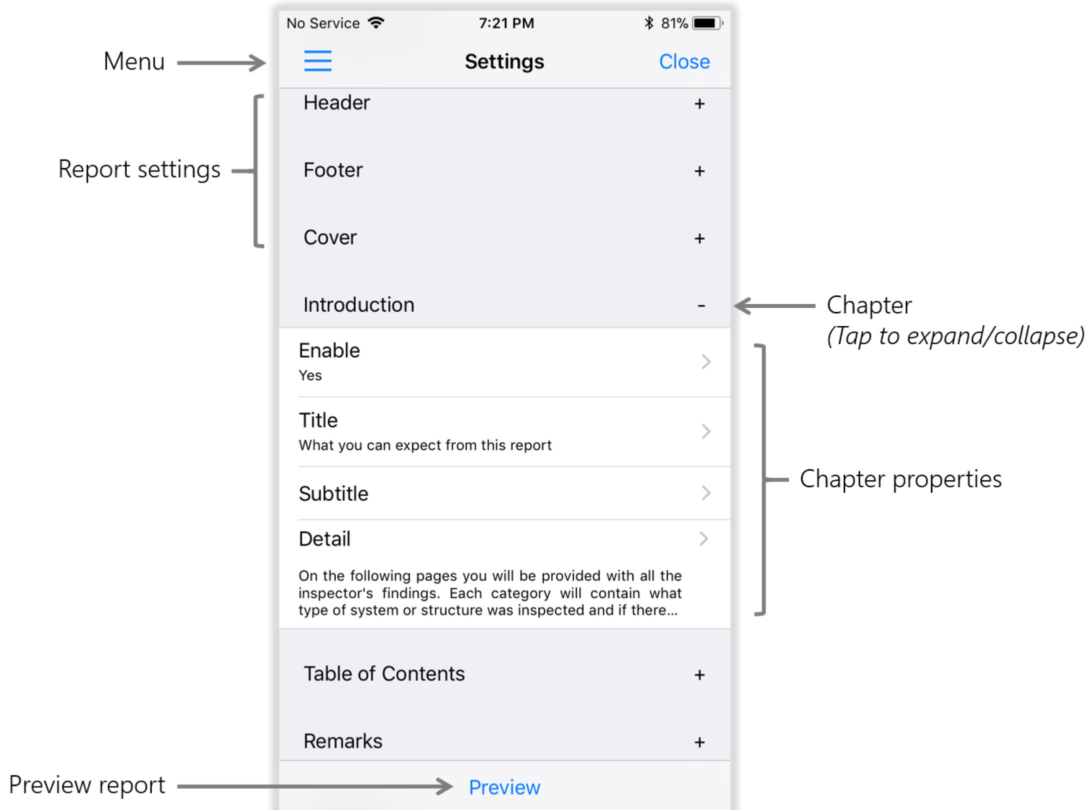


Figure 18 - Report settings window

1. **Menu**
   Perform actions such as save as template, switch template and modify template.
2. **Report settings**
   Settings for the whole report, i.e., company info, inspector info, page settings, header, footer and cover page.
3. **Chapter properties**
   Settings for the selected chapter in the report.
4. **Preview**
   Click to preview the PDF report before printing or sharing.

See also:

- Using report templates - “Chapter 10: Report template” on page 76.
- Customizing report using HTML/CSS editor - “Chapter 12: Report Theme” on page 85.

Configure properties

Report can be customized by configuring report settings and chapter properties:

1. At settings window, tap any property to add/change value.
2. Fill in information or change the existing value. Click "**Save**".

Learn more how to configure the report: "8.3 Customizing report" on page 47.

Add an inspector signature

You can add an inspector signature which will be shown on the agreement page of final report side by side with your client signature. To add an inspector signature:

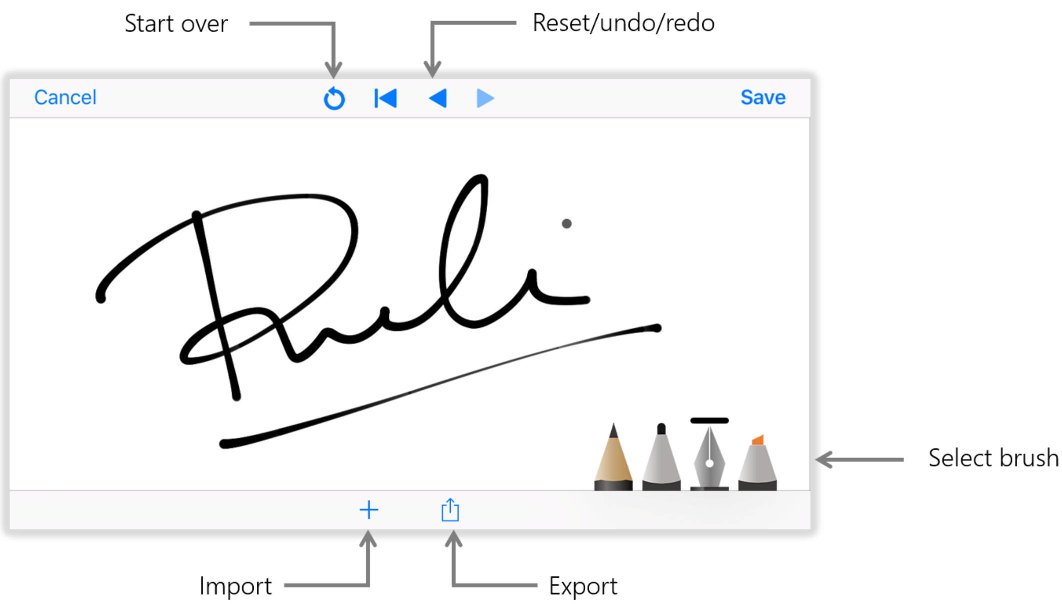


Figure 19 - Signature editor

1. Tap "**Inspector Info**" section to expand. Scroll down and tap "**Inspector Signature**" to launch signature editor.
2. Select a brush and sign, or click "**+**" to import existing signature file from your camera roll.
3. Click "**Save**".

Preview report

1. Click “**Preview**” button at the upper right corner of settings window.
2. A report will be generated and displayed on preview window.

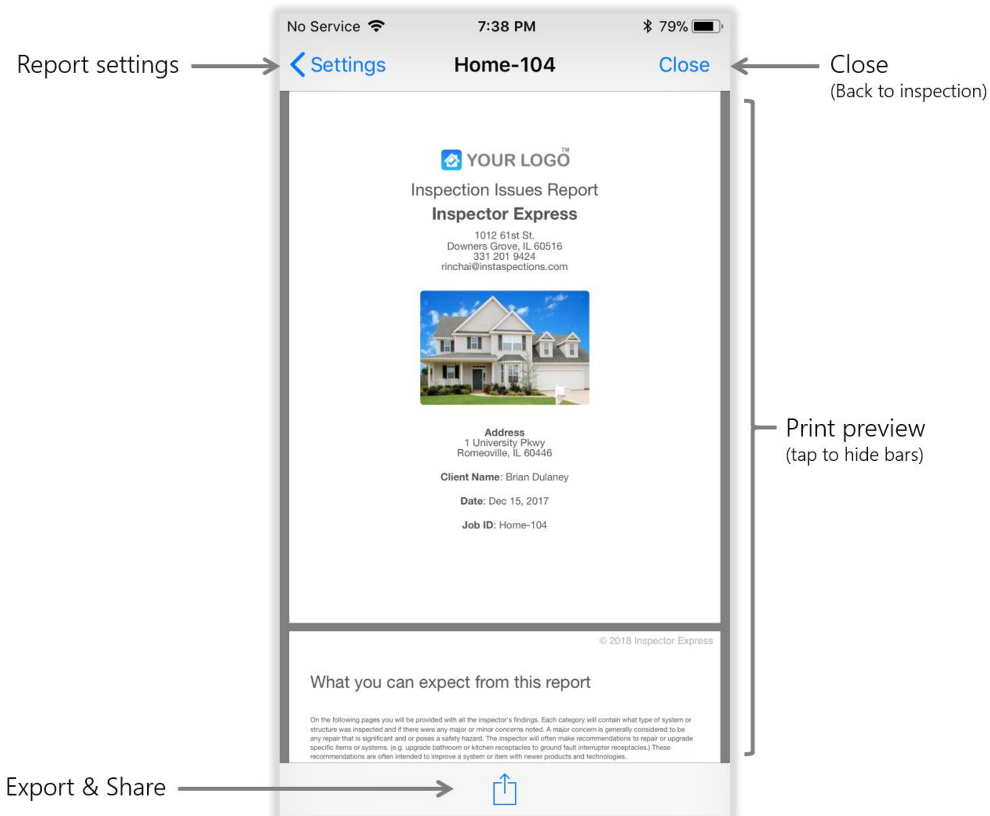


Figure 20 - Report preview window

1. **Settings**
   Back to report setting.
2. **Close**
   Back to inspection.
3. **Export & share**
   Export or share your report.

Share as PDF

1. Click "**Export & Share**" button at the bottom of preview window.
2. Select "**PDF**".
3. Choose export options:
    a. **AirDrop** – export as a pdf file to your mac, iPhone or iPad that support AirDrop.
    b. **Mail** – export as a pdf file and send it via email.
    c. **Add to iCloud Drive** – save as a pdf file on your iCloud drive.
    d. **Print** – sent a file to your printer.
    e. **Import with iBooks** – sent a pdf file to the iBooks app.

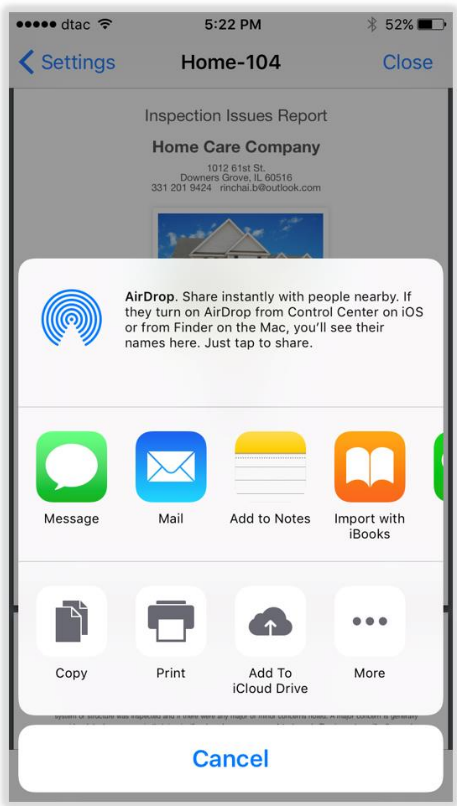


Figure 21 - Exporting report

Share as Negotiation Checklist

Negotiation checklists can be opened on any device that has NspectPro installed. Anyone receiving them can only show/hide items from showing in the final report. Adding or changing any inspection information is disabled. Ideal for sending them to client/realtor for review, and let them choose which information should be included for negotiation purposes.

1. Click "**Export & Share**" button at the bottom of preview window.
2. Select "**Negotiation Checklist**".
3. Choose export options:
    a. **AirDrop** – export as a pdf file to your mac, iPhone or iPad that support AirDrop.
    b. **Mail** – export as a pdf file and send it via email.
    c. **Add to iCloud Drive** – save as a pdf file on your iCloud drive.

Next step:

Congratulation! You have completed your first inspection. You are now ready for real inspections.

Where do I go from here? The following chapters will guide you all the tools and features in the app so you can get the best out of it!

Chapter 3: Using Photo Editor

Figure 22 - Photo editor, drawing mode

1. **Reset/undo/redo**
   Reset photo back to its original, undo and redo changes.
2. **Rotate**
   Rotate photo 90 degree clockwise.
3. **Select mode**
   Tap to switch between modes:
   - Draw - Draw with brushes.
   - Shape - Draw and convert line strokes to geometric shapes.
   - Text - Add custom text to your photo.
4. **Export**
   Export photo to a JPG file on your device or share it.

Draw with brushes

1. Switch to “Draw” mode by tapping the first mode button.
2. Choose a brush and draw.
3. Tap the selected brush for brush settings.

Convert drawings to shapes

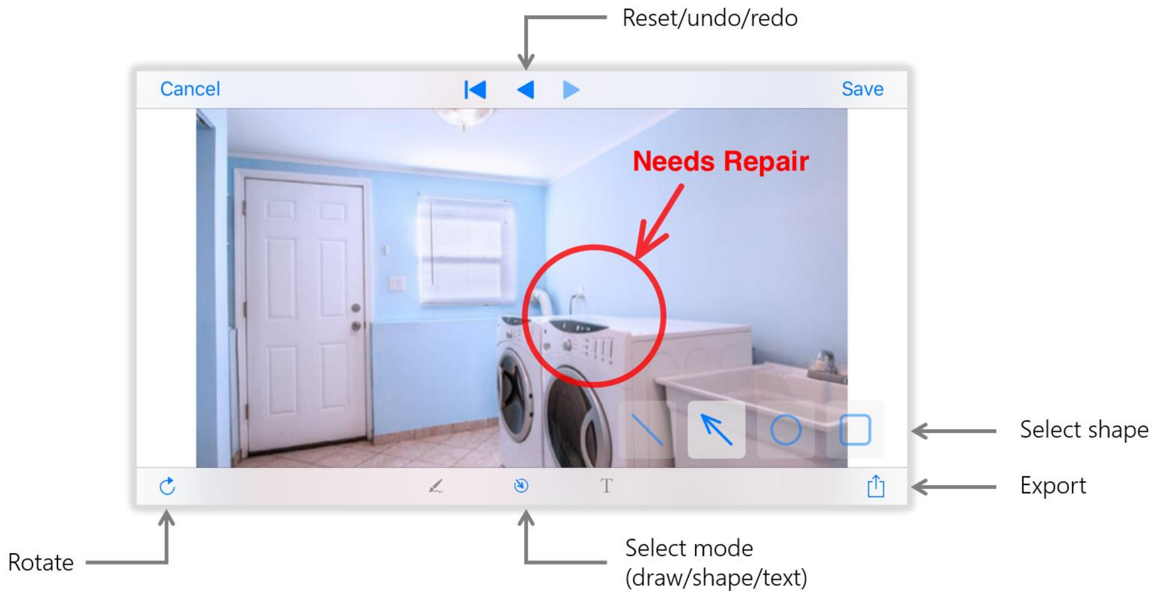


Figure 23 - Photo editor, shape mode

1. Switch to “Shape” mode by tapping the second mode button.
2. Select a shape to be converted, then draw a shape on the screen. Line strokes will be converted to the selected shape.
3. To change stroke size, or color switch to “Brush” mode and change the brush settings.

Add notes to photo

1. Switch to “Text” mode by tapping the third mode button.
2. Tap anywhere on the screen to place a text. Hold and drag to rearrange the text.
3. To customize the text, tap the “Text” mode button again for settings.

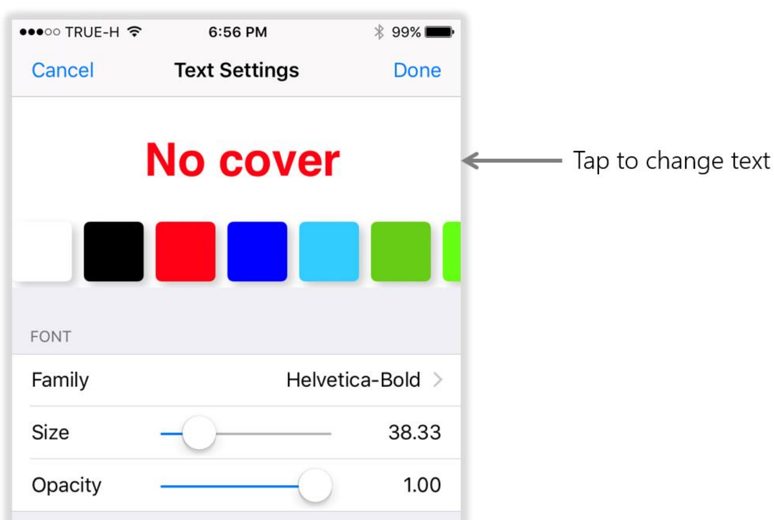


Figure 24 - Text settings

Chapter 4: Managing Jobs

4.1 Browsing saved jobs

Finding a job by scrolling down a list of hundreds or thousands saved jobs could be a time-consuming task. This section will guide you how to use tools we've provided to help you quickly find the job you're looking for.

Job list with search bar

By default, all saved jobs are displayed on the job list. Use search bar to filter and bring up only jobs that match your keywords.

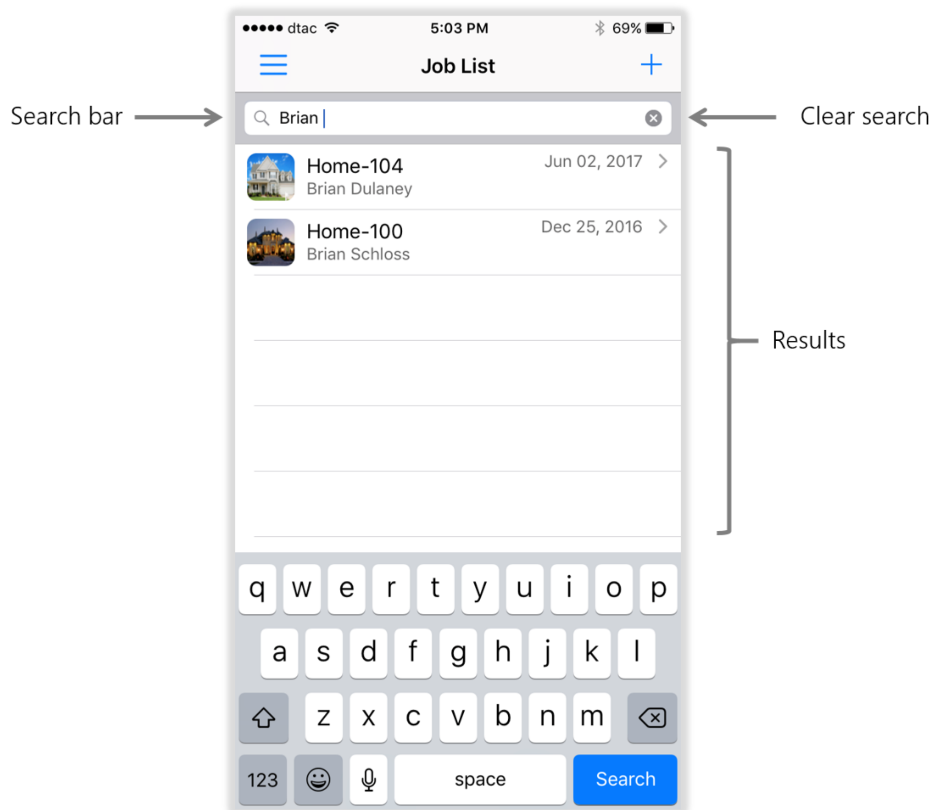


Figure 25 - Job list with search bar

To search job(s), do the following:

1. Type a keyword(s) in the search bar, containing job name, client name or address.
2. Matched jobs will show up while you are typing. If there is no matched job found, all jobs will be displayed instead.
3. Click (x) on the right of search bar to clear all results and start over. Hit "**Search**" button on your keyboard to hide the keyboard and finish the search.

Folder view

Folder view display saved jobs in folders - jobs with the same month are kept in the same folder so you can quickly browse for jobs at any date and time.

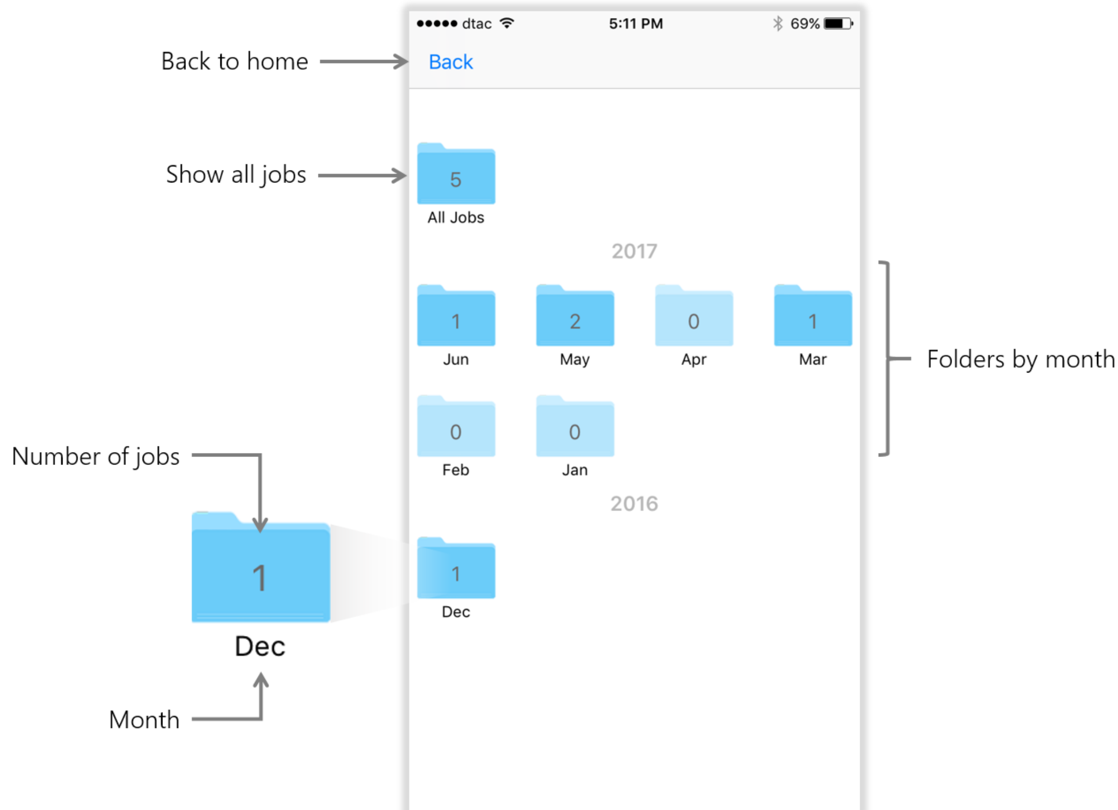


Figure 26 - Folder view

1. **Back**
   Go back to job window
2. **Folders**
   Each folder contains jobs that are created within the same month. A number shown on each folder indicates number of saved jobs inside.

To filter jobs using folder view, do the following:

1. At job window, click folder icon to open the folder view.
2. Tap any folder to reveal jobs inside. Jobs with the specified month will be displayed on the job list.
3. To clear the filter and show all jobs, start over from step 1, and at step 2 select a folder named "**All Jobs**".

> **Note**: Folder view use date information stored in job property to automatically allocate jobs into folders. Jobs without data information can be found in "**All Jobs**" folder.

Tips: You can use folder view in combination with search bar to refine your search results. First, use folder view to show only jobs within the same month, then use search bar to refine your results with keywords.

Map view

Use map view to view saved jobs on the map, browse for jobs in the surrounding area, or to find out where your inspections took place.

To use map view, do the following:

1. At job window, click map icon to open map view.
2. Use touch gestures; pinch and drag to zoom and pan the map respectively.
3. Click pin to pop up a balloon, revealing job name and address of the property.
4. Tap the balloon to open saved job or tap elsewhere on the map to hide the balloon.

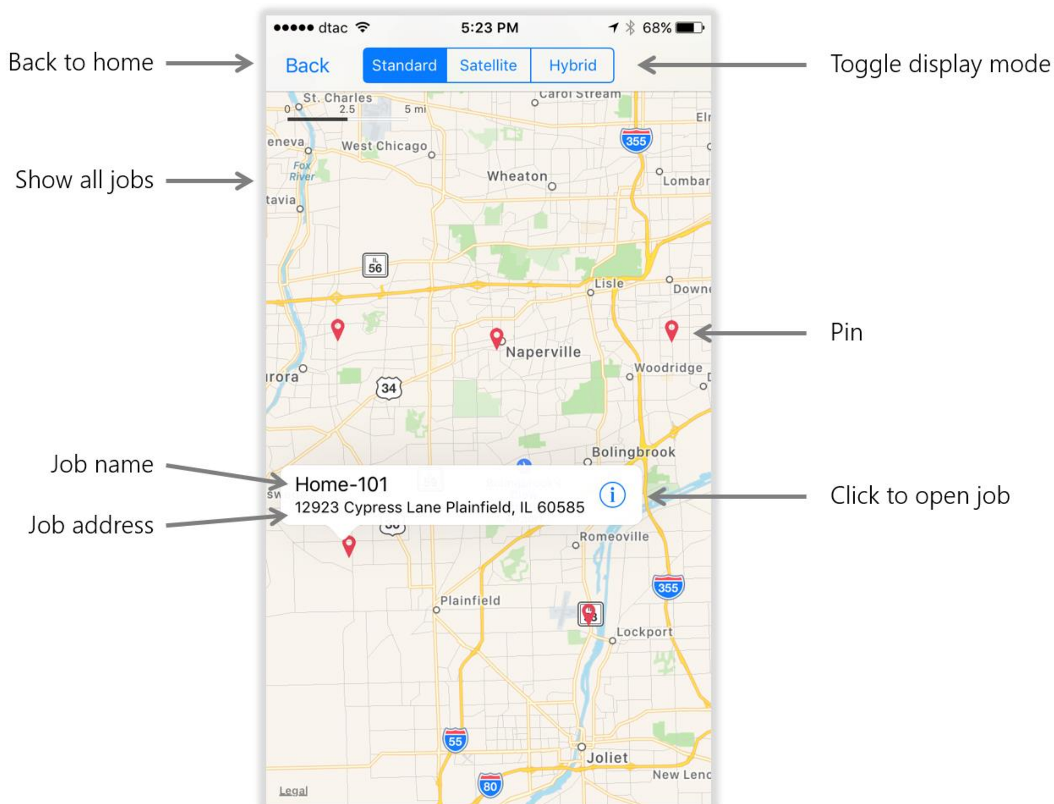


Figure 27 - Map view

1. **Back button**
   Go back to job window
2. **Map switcher**
   Switch between standard (graphical) map, satellite map or hybrid (overlay both map).
3. **Pins**
   Indicates the location of property.

4.2 Transferring jobs

This section will guide you how to use export and import functions to transfer jobs. You could transfer a job to your colleagues for collaboration, or transfer it to another device or computer, or via email or iCloud for backups.

Export

Export saved job as ".nsp" file which can be transferred and opened on any device that has NspectPro installed. Anyone receiving this file can continue the work or make change to the existing inspection before printing out the final report.

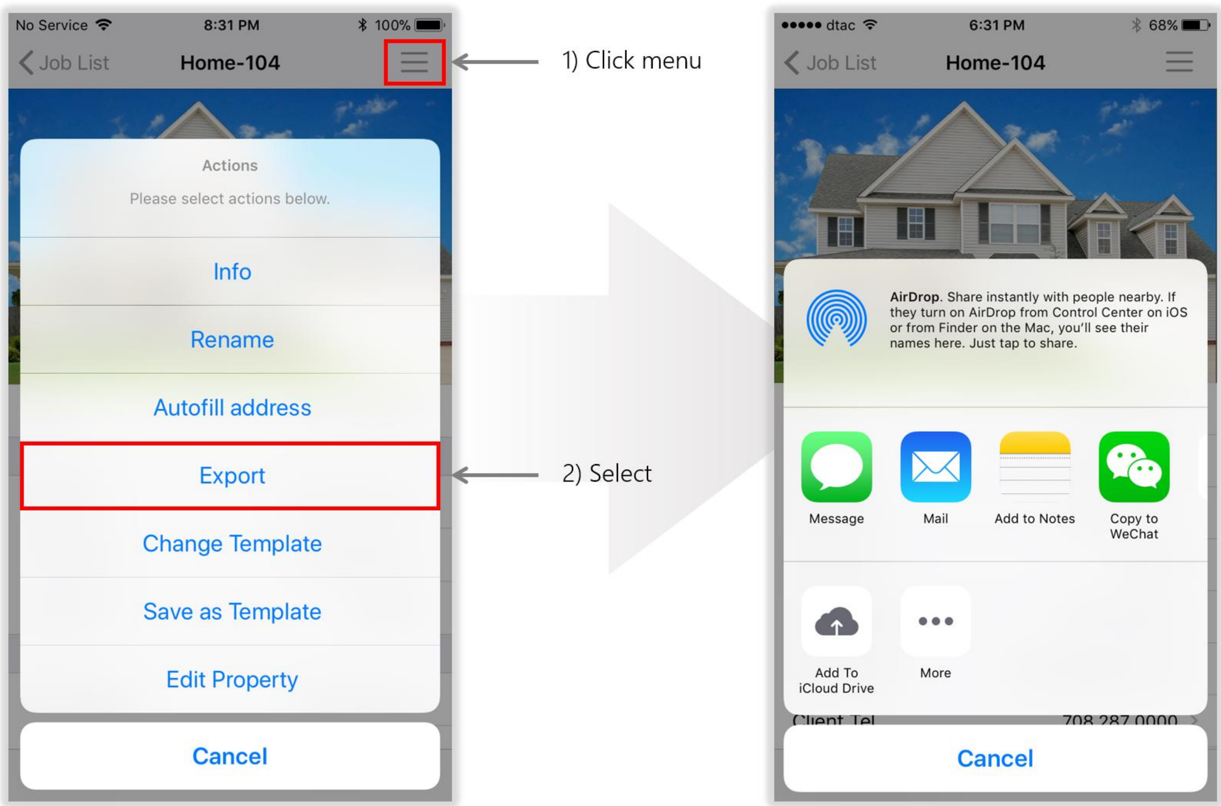


Figure 28 - Export job

1. Click menu button on the upper left of the job window.
2. Select "**Export**"
3. Choose export options:
    a. **AirDrop** – export as a file to your mac, iPhone or iPad that support AirDrop.
    b. **Mail** – export as a file and send it via email.
    c. **Add to iCloud Drive** – save as a file on your iCloud drive.

Import

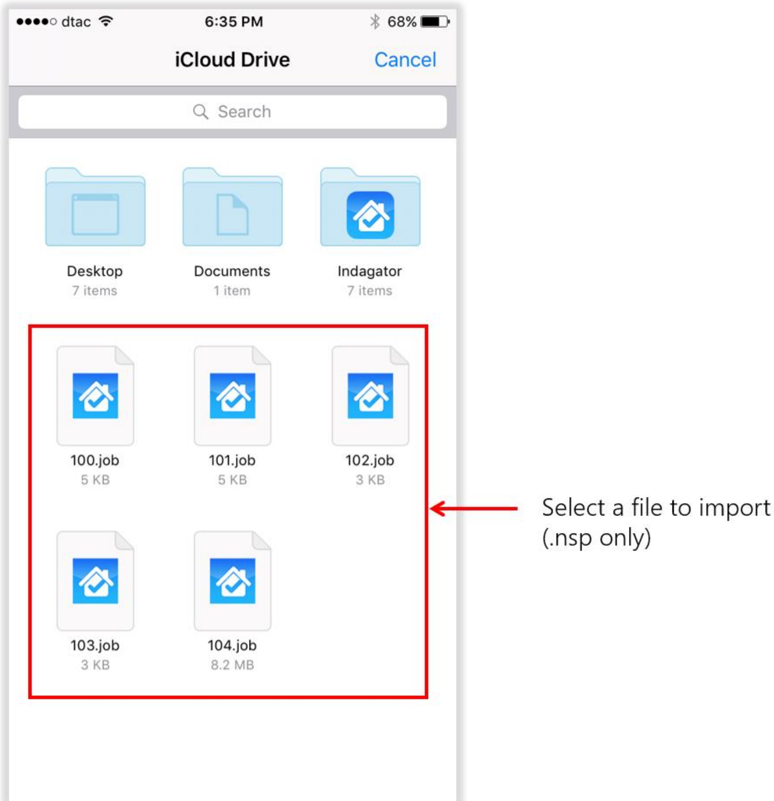


Figure 29 - Import job

1. At home screen, click "**+**" then select "**Import from file…**".
2. iCloud Drive window will be opened. Browse and select your saved job you wish to import.
3. Selected saved job will be added to the job list on the home screen.

Note:

- You can select only files with ".nsp" extension.
- You can only browse and import files from your iCloud. If you have files on your device or elsewhere, copy or move them to your iCloud first.
- One file can be imported at a time.

Tips: Imported job will be sorted by date. If you cannot find your imported job, try using search bar. See "Job list with search bar" on page 29.

Chapter 5: NspectPro Account

NspectPro Account keeps your user information and your subscription in one place, so you have access to the same app features and your inspection data on any device and any platform.

5.1 Viewing account information

To view your NspectPro account follow the following steps:

1. At the app's home screen, tap the menu button (three-bar buttons) at the upper left corner of the screen.
2. Select "**My Account**" from the main menu.
3. If you've already signed in, your account information will show up on another window. Otherwise, click "Sign in" button to sign in with your NspectPro account.

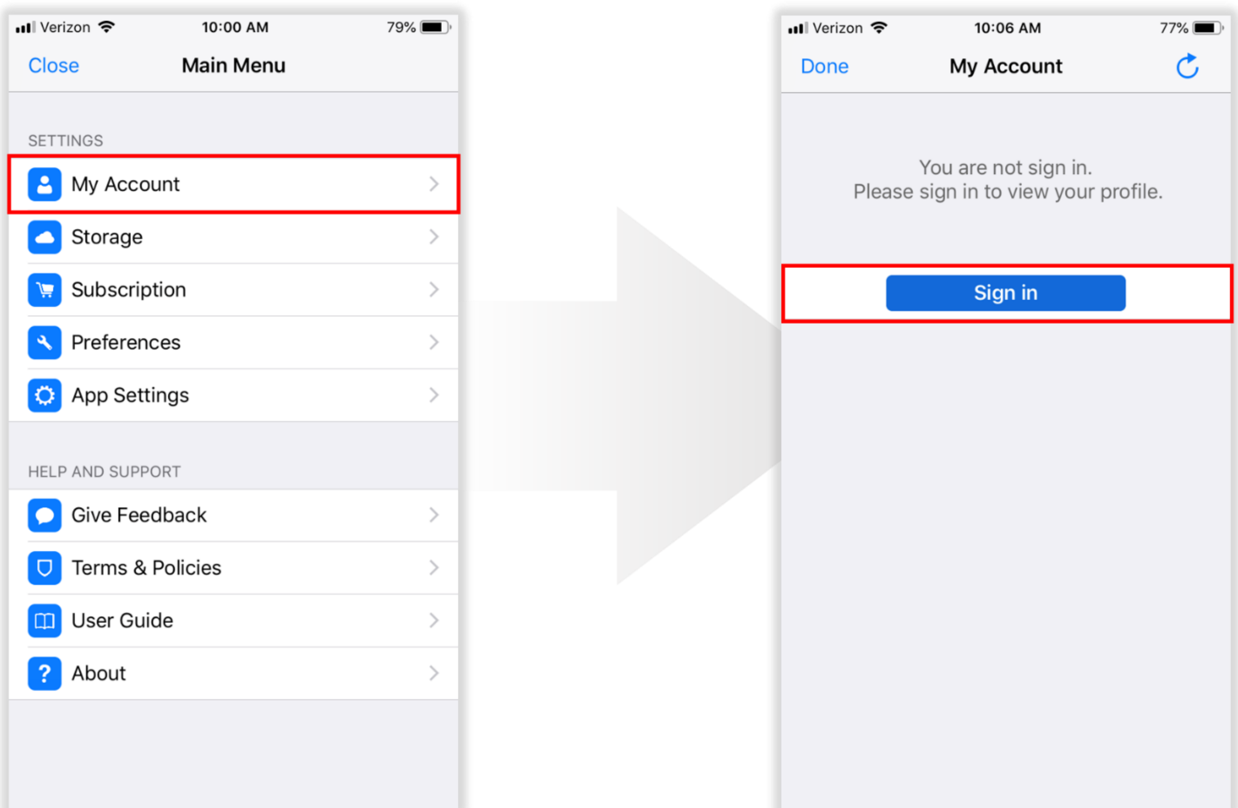


Figure 30 – NspectPro account information

5.2 Managing account

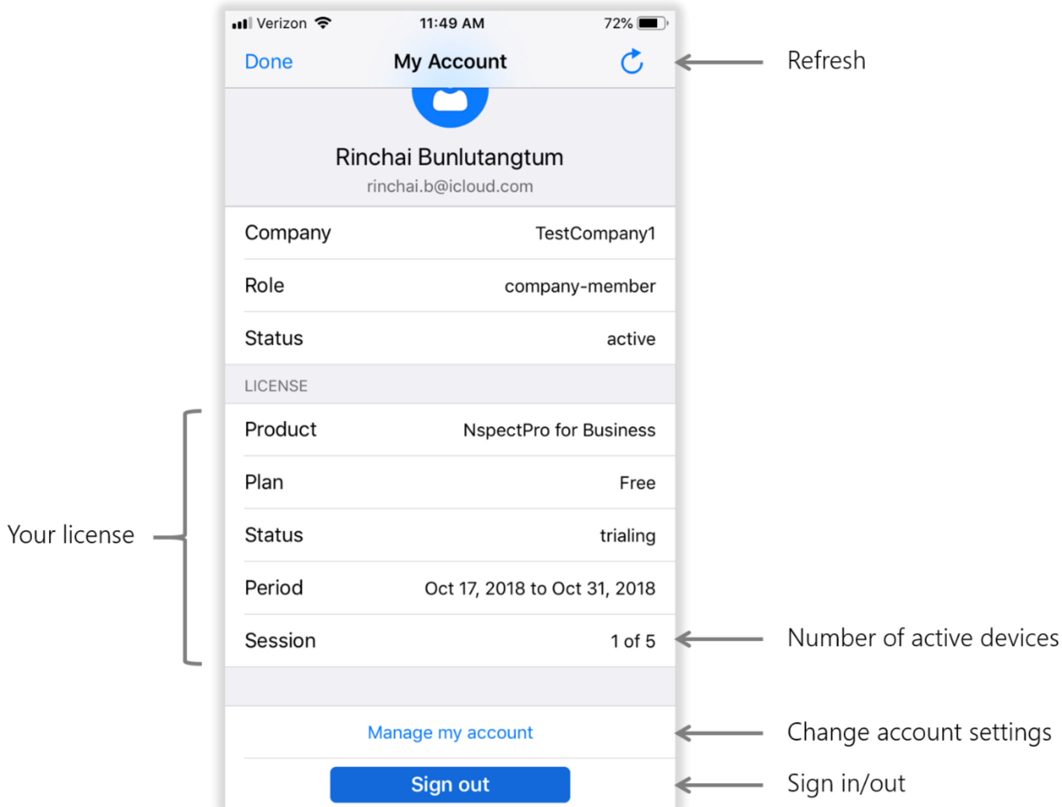


Figure 31 – NspectPro Account Window

To change your account information such as your name, your subscription plans, etc., tap "**Manage my account**" at the bottom of the page right before sign in/out button. You will be directed to accounts.nspectpro.com where you can perform further actions.

Chapter 6: Configuring storage

6.1 Type of storage

There are three types of storage setting available for you; local storage, iCloud and Google Drive.

1. **Local** - Data is stored on your local device.
2. **iCloud** - Data is stored on your local device and back up to your iCloud.
3. **Google Drive –** Data is stored on your local device and back up to your Google Drive.

Each storage type has different benefits as summarized below:

	Local	iCloud	Google Drive
Working offline Access your data and work on your inspection even though you don’t have internet access or having a slow internet connection.	✓	✓	✓
Auto backups If your device crashes or stolen, you have another copy of your data on the Cloud so you and reinstall the app and resume your work right away.		✓	✓
Storage pool Just sign in with the same user id on any of your device to access and do the inspection seamlessly from anywhere and anytime.		✓*	✓

*accessible on iOS devices only.

6.2 Switching storage

To switch between storage types, perform the followings:

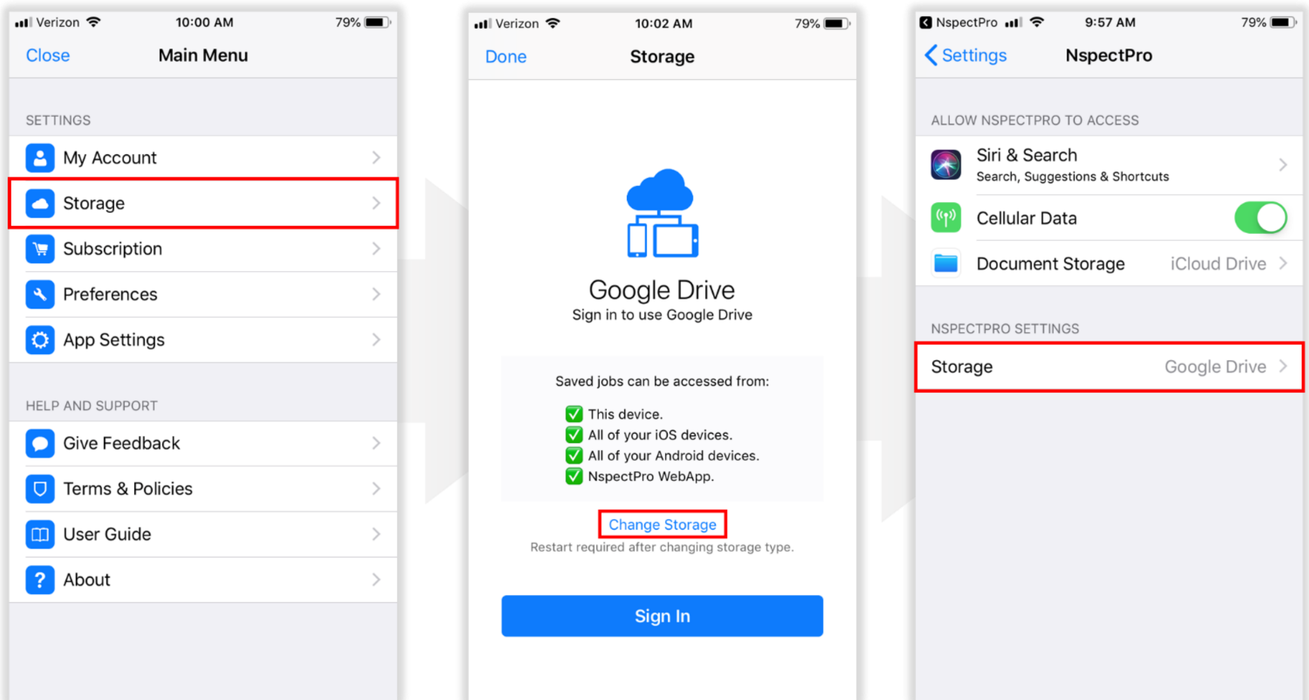


Figure 32 – Switching storage

1. At the app's home screen, tap menu button (three-bar button) to open the main menu.
2. Tap "**Storage**" to open storage setting window.
3. Tap "**Change Storage**" to open the app settings.
4. Tap "**Storage**" under the "**NspectPro Settings**" section, then select the storage type.
5. Tap the chevron at the upper left of the screen to go back to the app.
6. Reopen the app for changes to take effect.
7. Once the app is reopened, you will be asked for how to transfer data from previous storage to a new location. Available options are:
    a. **Merge** – data will be transferred and merge with existing data on the new location.
    b. **Replace** - data will be transferred and replace existing data on the new location.
    c. **Discard** – data will not be transferred to the new location.

6.3 Storage pool for multiple devices

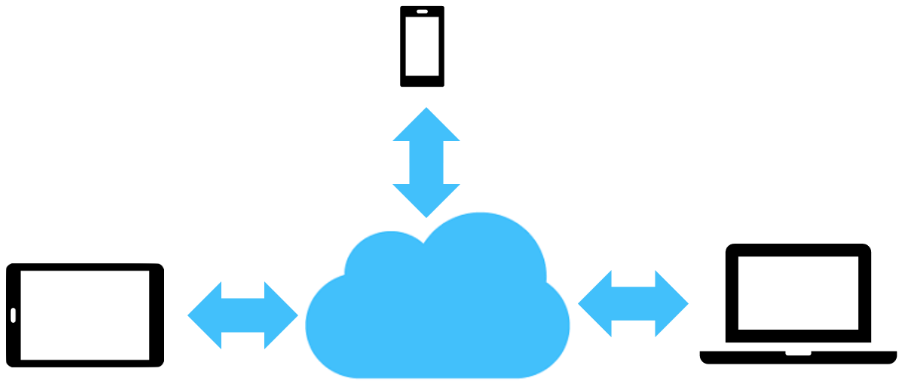


Figure 33 - Storage pool

If you have NspectPro app installed on multiple devices, you can setup a storage pool, so each device reads and writes inspection data on to the same storage location. Inspection made on one device will be automatically synced across the cloud to all your device in the same storage pool allowing you to do your inspection seamlessly at any place and any time on any of your device.

Requirements

To setup a storage pool, the following requirement must be met:

- All device has NspectPro app installed.
- All device is signed in to the same NspectPro account.
- All device is using the same storage type (all device must be using iCloud or Google Drive).
- All device is signed in to the same Cloud storage account.

Adding a device to the pool

1. Follow “Chapter 5: NspectPro Account” on page 34 to make sure that your device has signed in to the same NspectPro account.
2. Follow “6.2 Switching storage” on page 37 to make sure that your device is using the same storage type as others. All must be iCloud or Google Drive only.
3. Also make sure that your storage is signed in with the same user account; same Apple ID if iCloud is selected or same Google Account if Google Drive is selected.

> **Warning**: While switching the storage type, select transferring option “**Merge**” or “**Discard**” only. Do NOT select “**Replace**” since this option will remove all existing data in the pool.

Removing a device from the pool

1. Follow “6.2 Switching storage” on page 37 to switch the storage to local, or just sign out or sign in with a different storage account.
2. Repeat the steps to remove another device.

> **Warning**: If the device you are removing is not your last device in the pool, select transfer options “**Discard**” only. Do NOT select “**Merge**” or “**Replace**” since these options will remove all existing data in the pool after the transferring has completed).

Chapter 7: How the app works

7.1 App structure

Figure 34 illustrates the app's structure. It stores your works in files called "Jobs".

Nodes

Nodes are the hierarchical components of job. There are two node groups, inspection node group (shown in blue) and report node group (shown in green).

Inspection node group is responsible for storing your inspection data whereas report node group stores report structures and its data.

"Job" itself is a root node of both node groups. Both node group save your data in a hierarchical structure – an inspection node group contains "systems" as its child nodes with "items" and "objects" as their sub-child nodes respectively. The same concept is applied for report node group– a report node contains "chapters" as child nodes.

Note:

- A group of items called "section"
- A group of objects called "object group" or "part"

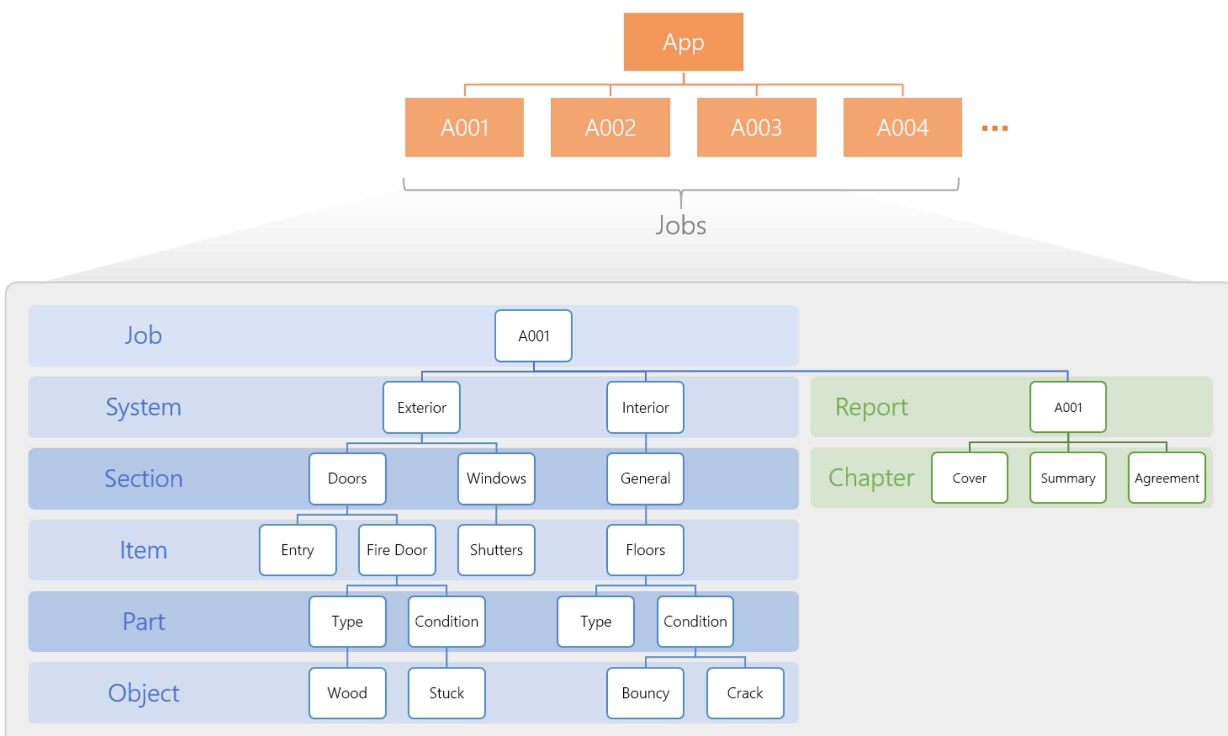


Figure 34 - A hierarchical structure of job

Properties

Each node stores data in a structure called “property”. A property consists of 5 entities, i.e., name, subtitle, data type, data and opts as shown in Figure 35.

Property	
Entity	**Description**
Name	Name of the property
Subtitle	Used as a translation of foreign languages.
Data Type	Type of data stored
Data	Content of this property
Opts	List of available options for this property

- number
- text
- paragraph
- date
- radio
- checklist
- photo

Figure 35 - Property structure

A node can contain multiple properties. For example, a job node may store properties as shown in Figure 36.

Job Properties				
Name	Subtitle	Data Type	Data	Opts
Date	-	date	2017-04-02	-
Address	-	text	Naperville	-
Client name	-	text	Rinchai	-
Inspection price	-	number	500	-

Figure 36 - Example of job properties

7.2 Templates

Inspection report is created from templates which are files that store structures and predefined information, so that when you do your inspection and reporting you don't have to start from scratch, but instead start from these templates, saving you time and effort.

There are three types of templates; job templates, report templates and report themes.

Job template

Job template stores structures and predefined information for inspection such as a list of systems, conditions and descriptions.

Report template

Report template stores structures and predefined information for creating a report such as information to be appeared in cover page, table of content and agreement.

Report theme

Report theme stores the graphical codes for creating a finished report such as font, format and page layout.

7.3 How jobs and reports are created

Figure 37 illustrates how each type of templates work together to create a completed report.

When a new job is created, it is linked to a job template you have previously selected. Inspection structure and predefined information such as a list of systems and descriptions will be copied from the selected job template and saved to a job file while you are performing an inspection.

After the inspection is done, report structure and predefined report data from the selected report are copied from the report template and then save to the job file. Finally, a report theme is applied to render a final PDF report.

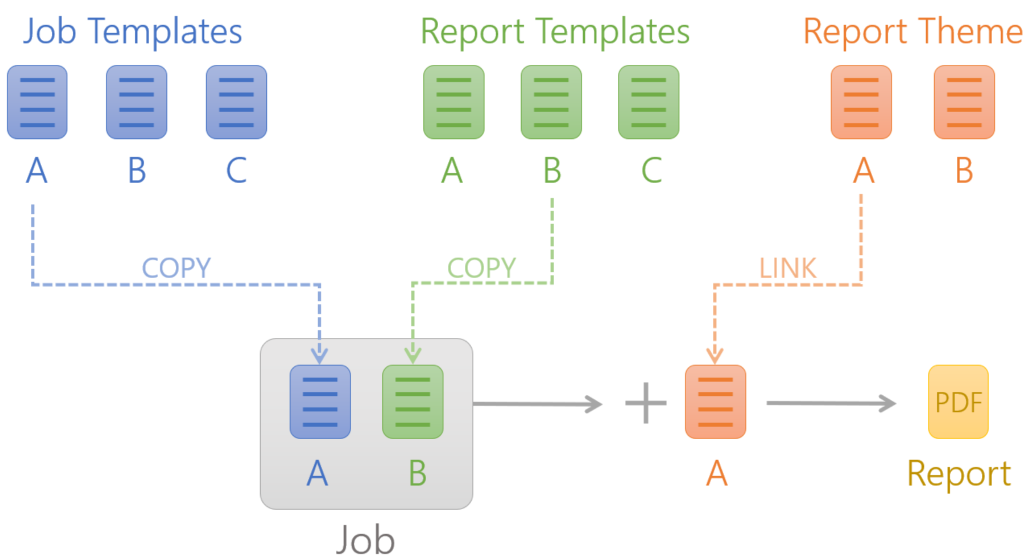


Figure 37 - How job and report are created

> **Note**: Since jobs and reports are created by copying data from templates, any changes made to the template will only affect the future jobs not the existing ones. Changes made to the report theme will affect both future jobs and existing jobs.

Chapter 8: Customizing Inspection

The app is provided with templates for inspecting common houses and properties, which should cover most of inspection works. However, if the property you are working on has something extra or different than what we have provided such as extra rooms or special facilities, you can customize the inspection to suit your needs.

This chapter will introduce how to customize the common parts, i.e., system list, object list and report. For further customization see "Chapter 9: Job template", "Chapter 10: Report template" and "Chapter 12: Report Theme" on page 63, 76 and 85 respectively.

8.1 Customizing system list

To customize the system list, click "**Edit**" on the upper right corner of the inspection window to enter editing mode.

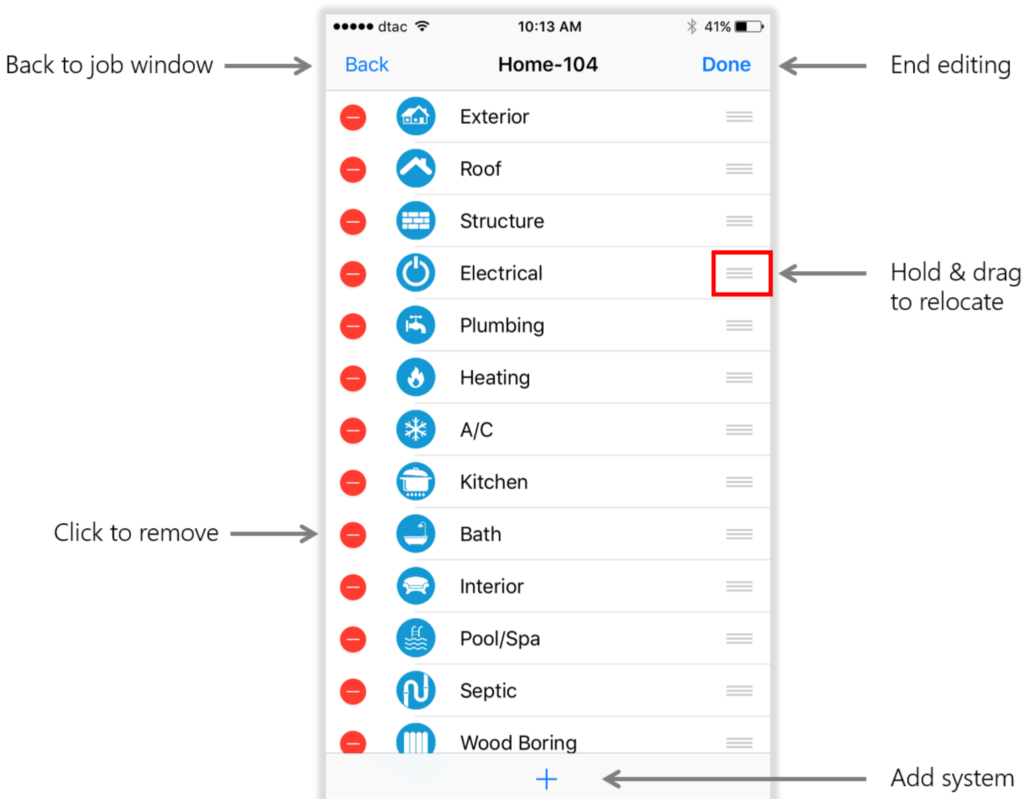


Figure 38 - Customizing system list

Add system

1. Tap add button at the bottom to open another window showing a list of systems under the current template.
2. Select a system(s) you would like to add from the list*. Then click "**Done**" to close the window. Selected system will be copied from template and added to the current job.
3. Click "**Done**" again to leave editing mode.

Note: * You can create a customized system and add it to the list. See “System list” on page 68.

Remove system

1. Click delete icon at the front of row you would like to remove.
2. Extra actions will be revealed. Select “**Delete**” to confirm.
3. Click “**Done**” to leave editing mode.

Reorder system

1. Press and hold three-bar button on the row you would like to reorder.
2. Drag and drop to reorder rows as desire.
3. Click “**Done**” to leave editing mode.

8.2 Customizing object list

By default, more than 6,000 ready-to-use objects such as those in types and conditions are provided, which should cover most of the situations. However, you can add more to the list or customize the existing ones as well.

At item window, tap any object group (such as “Type” or “Condition”) to open available object list, then follow the guide below.

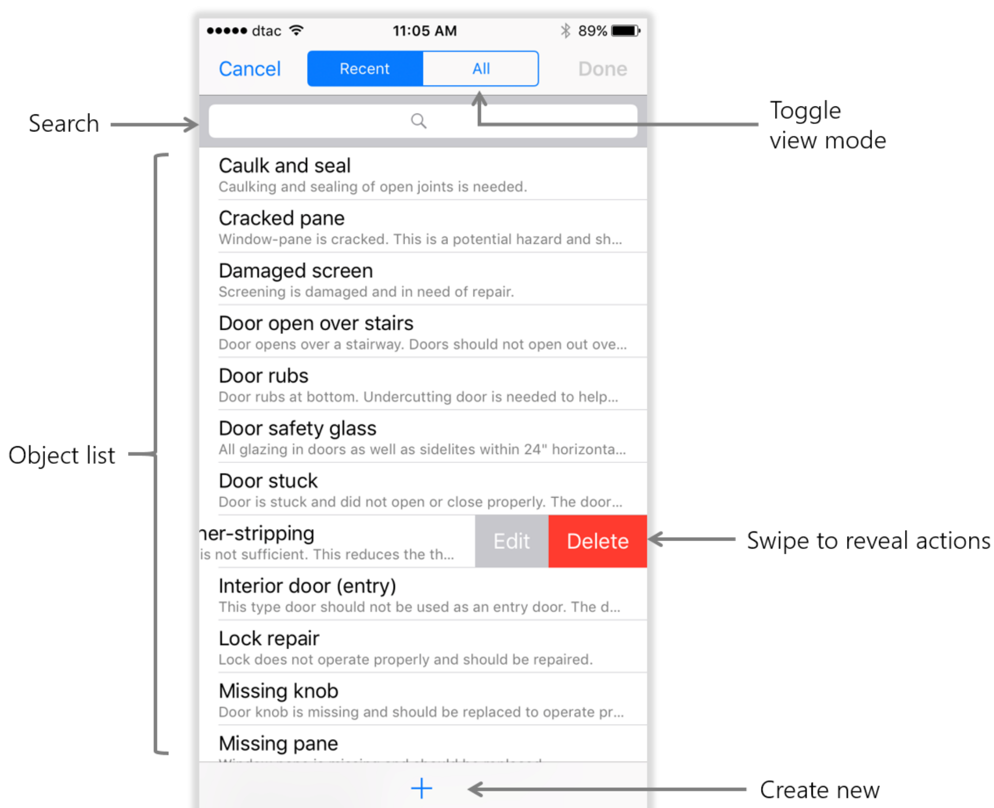
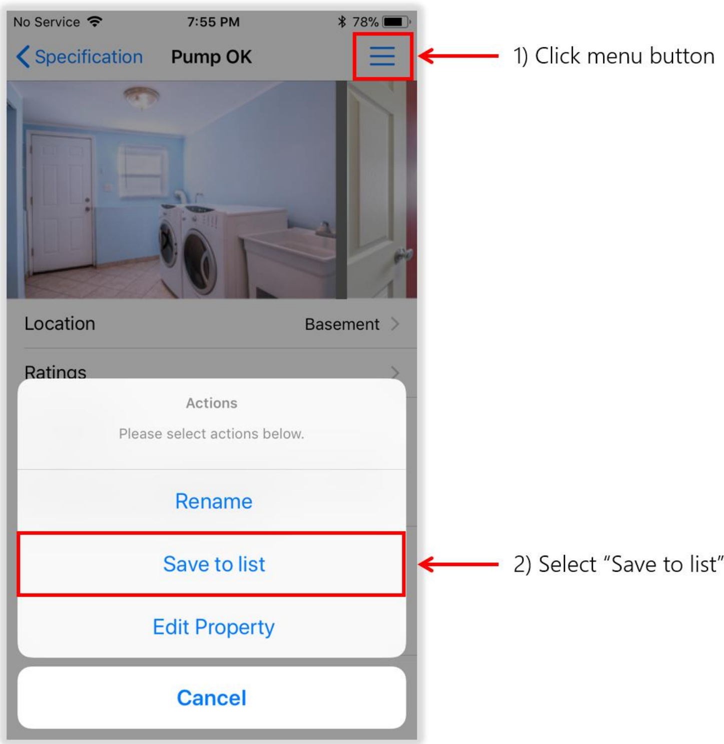


Figure 39 - Customizing object list

Create new object

1. Click "**+**" button at the bottom.
2. Fill in information for your new object:
    a. **Name** – name of the object
    b. **Subtitle (Optional)** - will be shown next to name (normally used as a translation of foreign languages) but will not be shown in the final report.
    c. **Text (Optional)** – description or detail of the object.
3. Click "**Save**". A new object will be added to the bottom of the list.

Tips: You can also add a new object to the list right from the object window. At object window, click menu button and choose "**Save to list**".



Edit object

1. Swipe row you wish to remove to the left to reveal hidden actions, select "**Edit**".
2. Edit the information then click "**Save**".

Remove object

1. Swipe row you wish to remove to the left to reveal hidden actions, select "**Delete**".
2. A confirming window will pop up, click "**Delete**" to confirm.

8.3 Customizing report

To customize report, go to report settings page, then tap any property in the list to change its value. See following topics for detail.

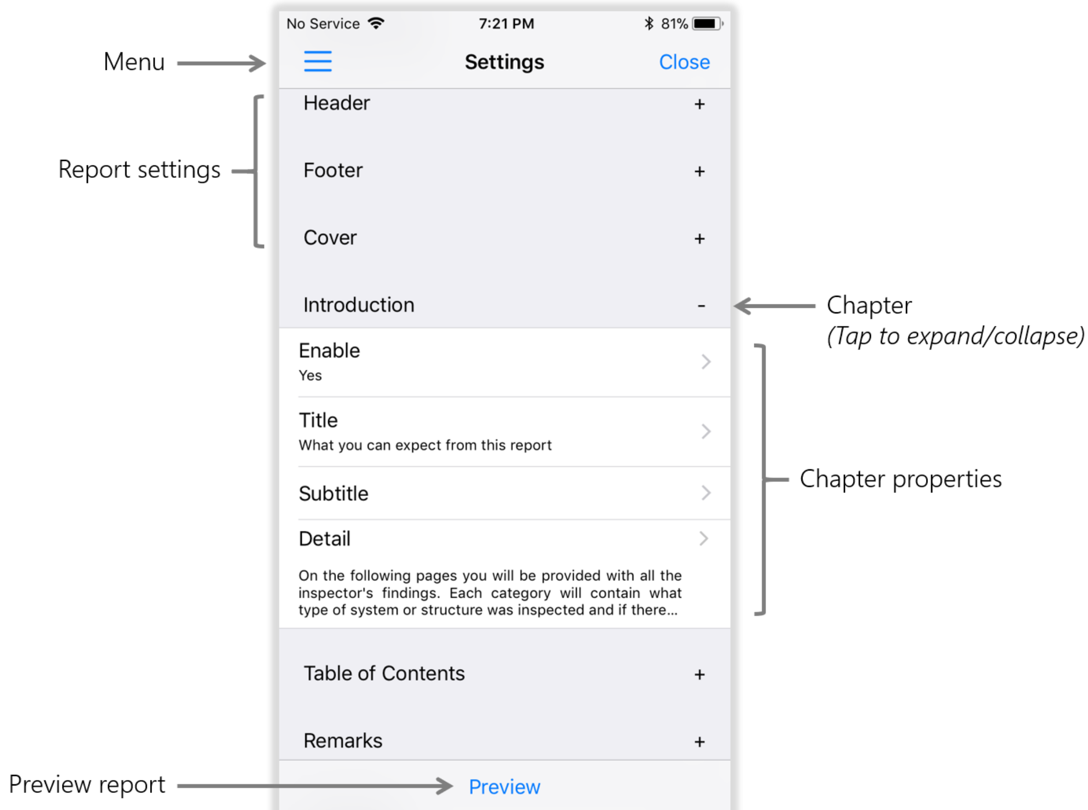


Figure 40 - Report settings window

Report settings

Company Info

Property	Description
Company Name	Company info to be appear on the cover page, agreement page, header, footer and in the report content (if any).
Company Address	
Company City/State	
Company Zip Code	
Company Email	
Company Tel	
Company Logo	

Table 2 – Properties for Company Info

Inspector Info

Property	Description
Inspector Name Inspector Title Inspector Signature License Title License Number	Inspector info to be appear on the cover page, agreement page and in the report content (if any).
Standards of Practice	Choose one that you're using (if any) – will be appeared on the agreement page.

Table 3 – Properties for Inspector Info

Page Settings

Property	Description
Page Size Margin Top Margin Bottom Margin Left Margin Right	Page settings
Font Size	Font size in pixel (px)
Line Spacing	Line spacing in %
Image Quality	Choose how to compress images in the report. Lower image quality reduces report file size.
Date Format	Choose preferred date format to be displayed throughout the report. For example, "01 Jan 2017" is "dd MMM yyyy".
Text Marker Keywords for Text Marker	Choose how to highlight a paragraph when a specific keyword(s) is found. See "**Standards of Practice**" on page 56.

Table 4 – Properties for Page Settings

Header

Property	Description
Show Header Show Header Line	Show/hide header and line on every page of the report.
Header Text Left Header Text Center Header Text Right	Choose texts to be added to the left, center and right side of header respectively; Client Name, Company Name, Copyright, Date, Inspector Name, Job ID, Page Number or None.
Header Font Header Font Size Header Font Color Header Line Color	Header font and line settings.
Header Padding Top Header Padding Bottom Header Padding Left Header Padding Right	Header spacing settings.

Table 5 – Properties for Header

Footer

Property	Description
Show Footer	Show/hide footer and line on every page of the report.
Show Footer Line	Choose to show/hide footer line on every page of the report.
Footer Text Left Footer Text Center Footer Text Right	Choose texts to be added to the left, center and right side of footer respectively; Client Name, Company Name, Copyright, Date, Inspector Name, Job ID, Page Number or None.
Footer Font Footer Font Size Footer Font Color Footer Line Color	Footer font and line settings.
Footer Padding Top Footer Padding Bottom Footer Padding Left Footer Padding Right	Footer spacing settings.

Table 6 – Properties for Footer

Chapters

Below figures are highlighted in colors to show how properties affect the final report. Job properties are in "**orange**", report properties are in "**green**" and chapter properties are in "**blue**".

Note: Changes you've made to the report are automatically saved to the current report template and will be applied for your future reports.

Tips:

- You can save changes as a new template. For example, you can have two different templates containing two different report settings; first template is for company A and second template is for company B. See "Chapter 10: Report template" on page 76.
- You can add more report property or modify the existing ones. See "10.4 Modifying report template" on page 79.
- You can add a dynamic text to the report. See also "Code referencing" on page 60.

Cover page

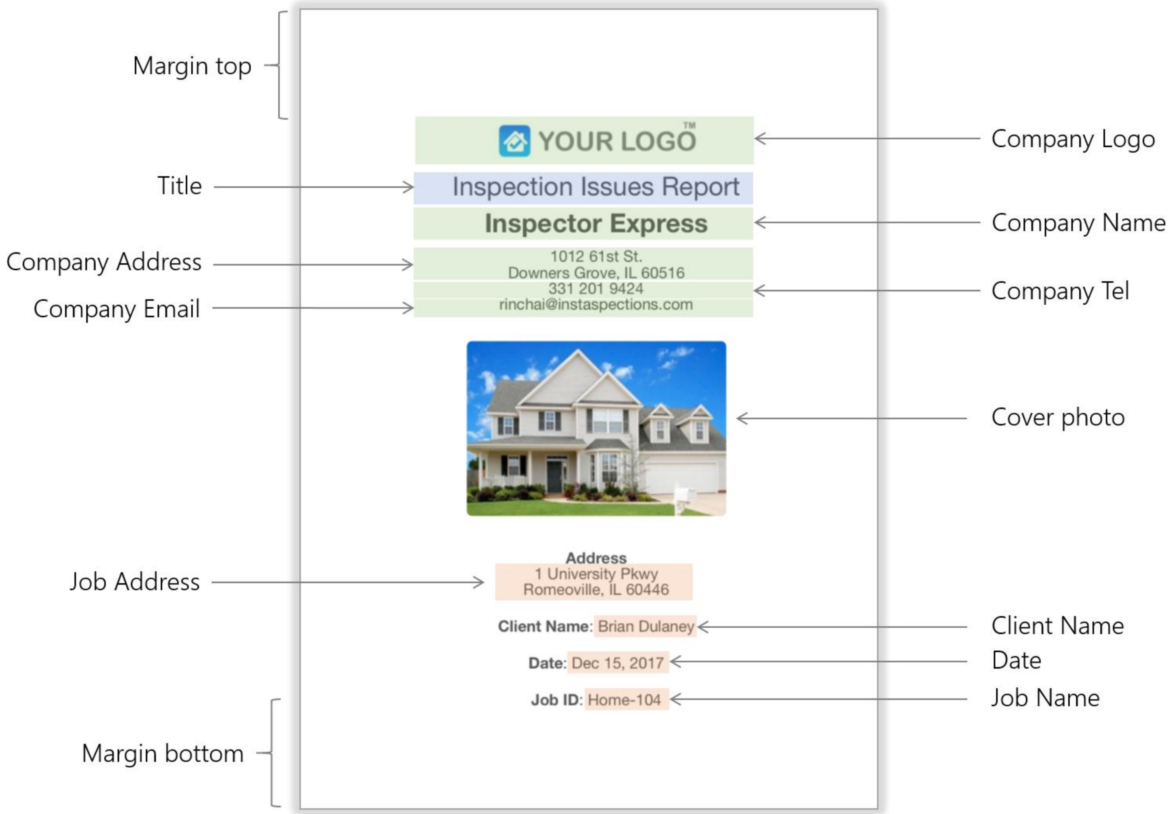


Figure 41 - Report cover page

Property	Description
Enable	Show or hide cover page.
Enable for Checklist	Show or hide cover page when exporting as a Negotiation Checklist.
Title	Title of this chapter. (To be shown in table of content)
Margin Top	Override spacing settings defined in page settings.
Margin Bottom	
Image Size	Maximum size of photo(s) in pixel (px)
Image Aspect Ratio	Resize image to the specified width:height ratio. Choose “None” to ignore ratio constrain.
Show Logo	Show or hide company logo.
Logo Size	Logo size in pixel.

Table 7 – Properties for cover

Info page

These settings apply to the following chapters: Introduction, Remarks, Definitions and Additional Information.

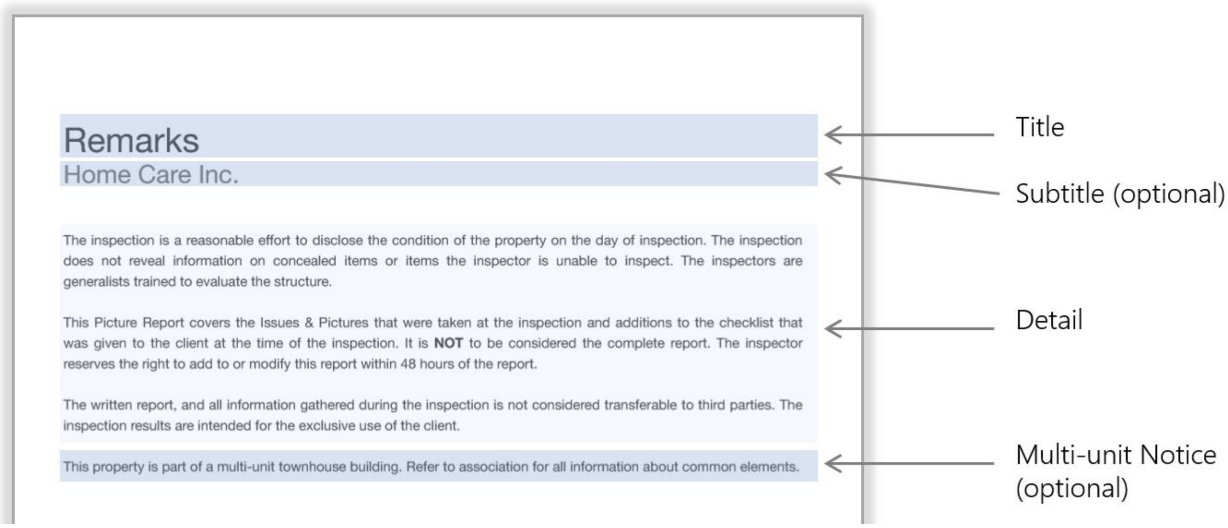


Figure 42 - Report info page

Property	Description
Enable	Show or hide this chapter.
Enable for Checklist	Show or hide cover page when exporting as a Negotiation Checklist.
Title	Title of this chapter. (To be shown in table of content)
Subtitle	Subtitle of this chapter.
Detail	Detail of this chapter.
Multi-unit Notice	Display additional notice at the bottom of the page if the property is a multi-unit building.

Table 8 – Properties for info

Table of Contents

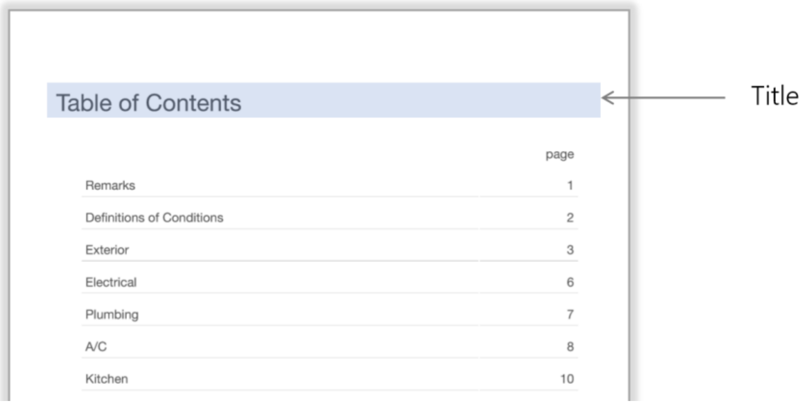


Figure 43 – Report table of content

Property	Description
Enable	Show or hide this chapter.
Enable for Checklist	Show or hide cover page when exporting as a Negotiation Checklist.
Title	Title of this chapter. (To be shown in table of content)

Table 9 – Properties for table of content

System

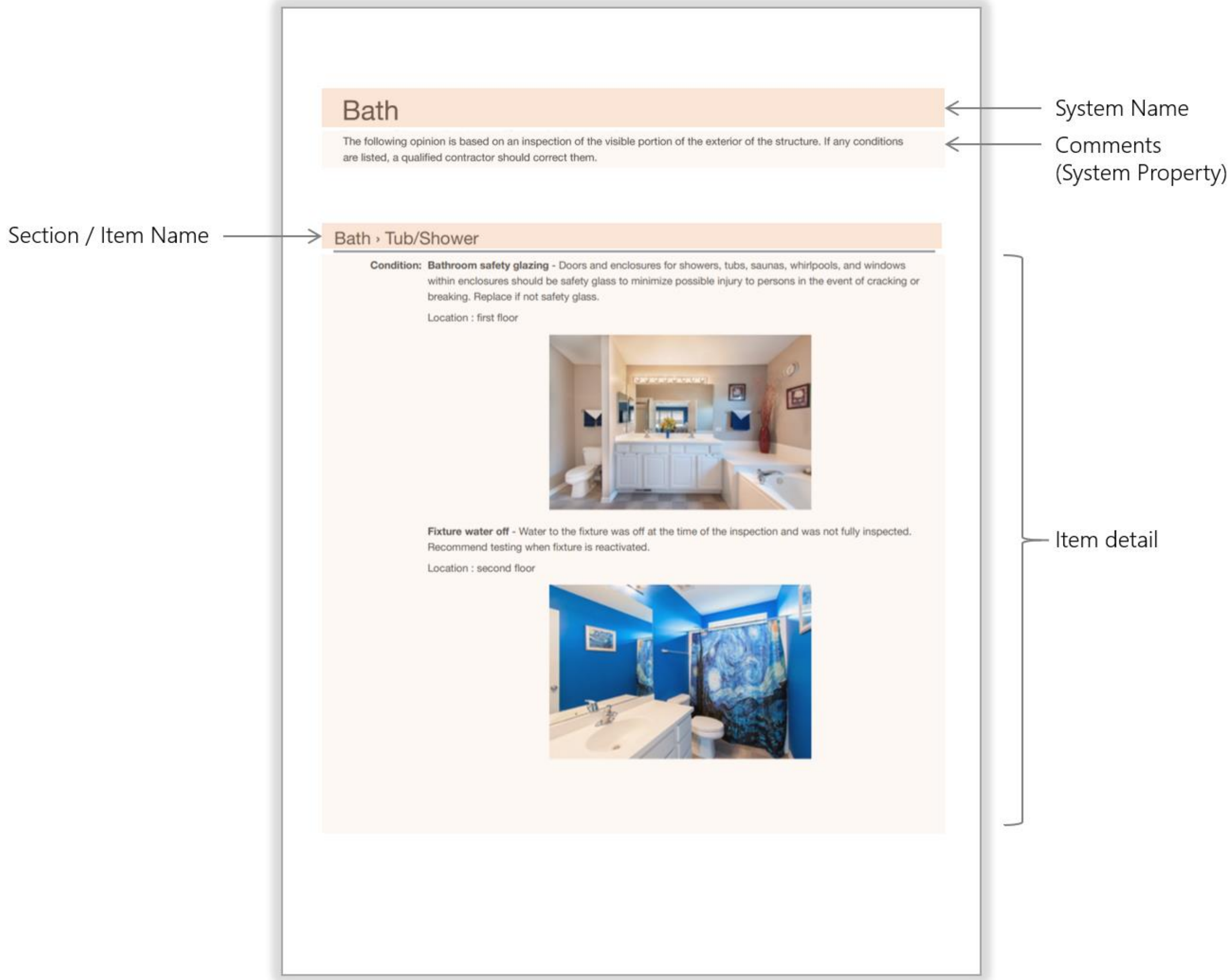


Figure 44 – Report system page

Property	Description
Enable	Show or hide this chapter.
Enable for Checklist	Show or hide cover page when exporting as a Negotiation Checklist.
Title	Title of this chapter. (To be shown in table of content)
Margin bottom	Override margin bottom value defined in page settings.
Image Aspect Ratio	Resize image to the specified width:height ratio. Choose “None” to ignore ratio constrain.
Sort by Ratings	“Yes” - objects under the same item will be ordered by ratings. “No” – objects under the same item will be ordered as inspected. See also “Sort objects by ratings” on page 59.
Show Sections	“Yes” – display section text next to the item name
Image Size	Maximum size of photo(s) in pixel (px)
Image Aspect Ratio	Resize image to the specified width:height ratio. Choose “None” to ignore ratio constrain.

Table 10 – Properties for system section

System Summary

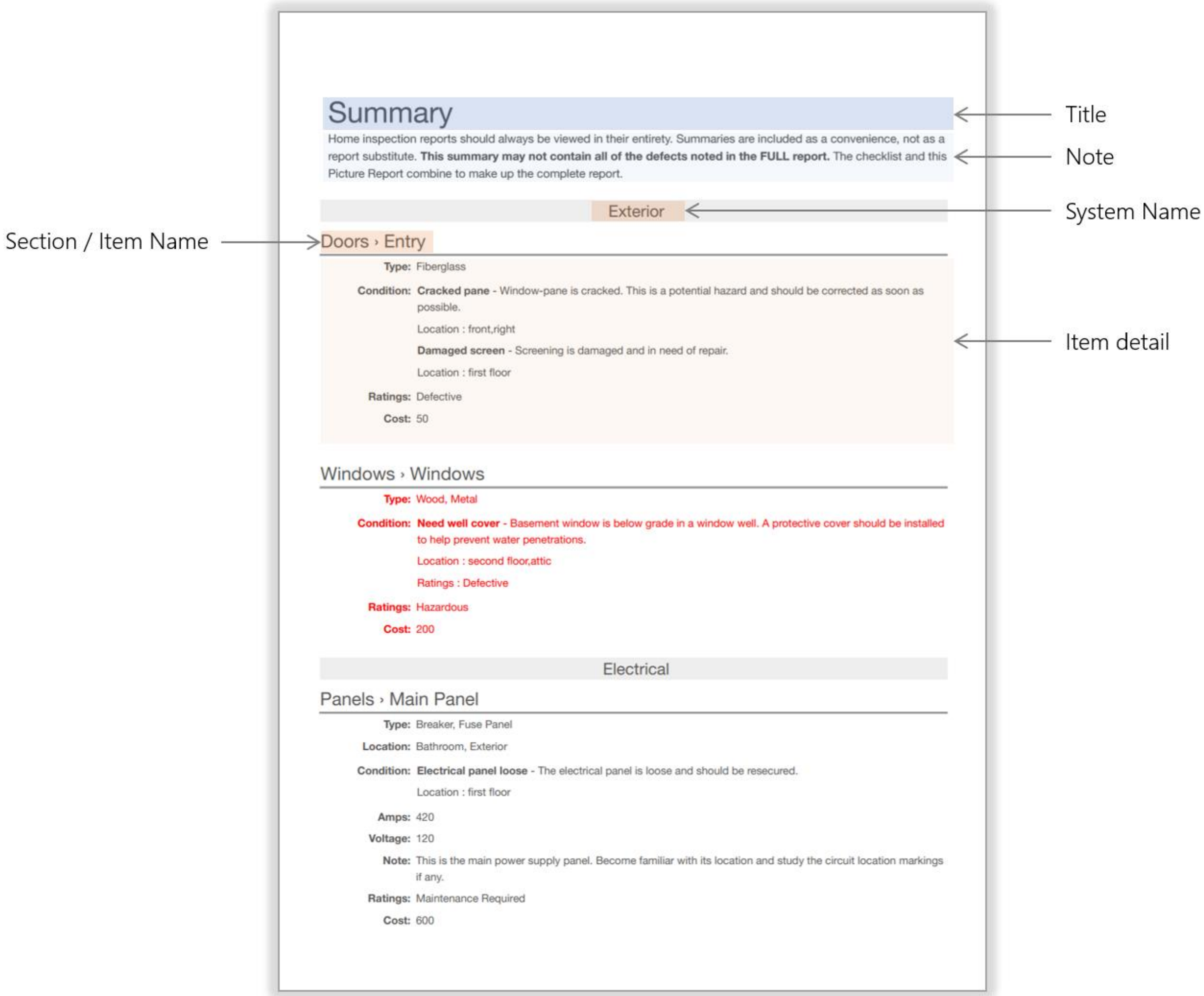


Figure 45 - Report summary page

Property	Description
Enable	Show or hide this chapter.
Enable for Checklist	Show or hide cover page when exporting as a Negotiation Checklist.
Title	Title of this chapter. (To be shown in table of content)
Sort by ratings	"Yes" - objects under the same item will be ordered by ratings. "No" – objects under the same item will be ordered as inspected. See also "Sort objects by ratings" on page 59.
Show Sections	"Yes" – display section text next to the item name
Note	Add a note at the top of the page before the summary content.

Table 11 – Properties for summary section

Agreement

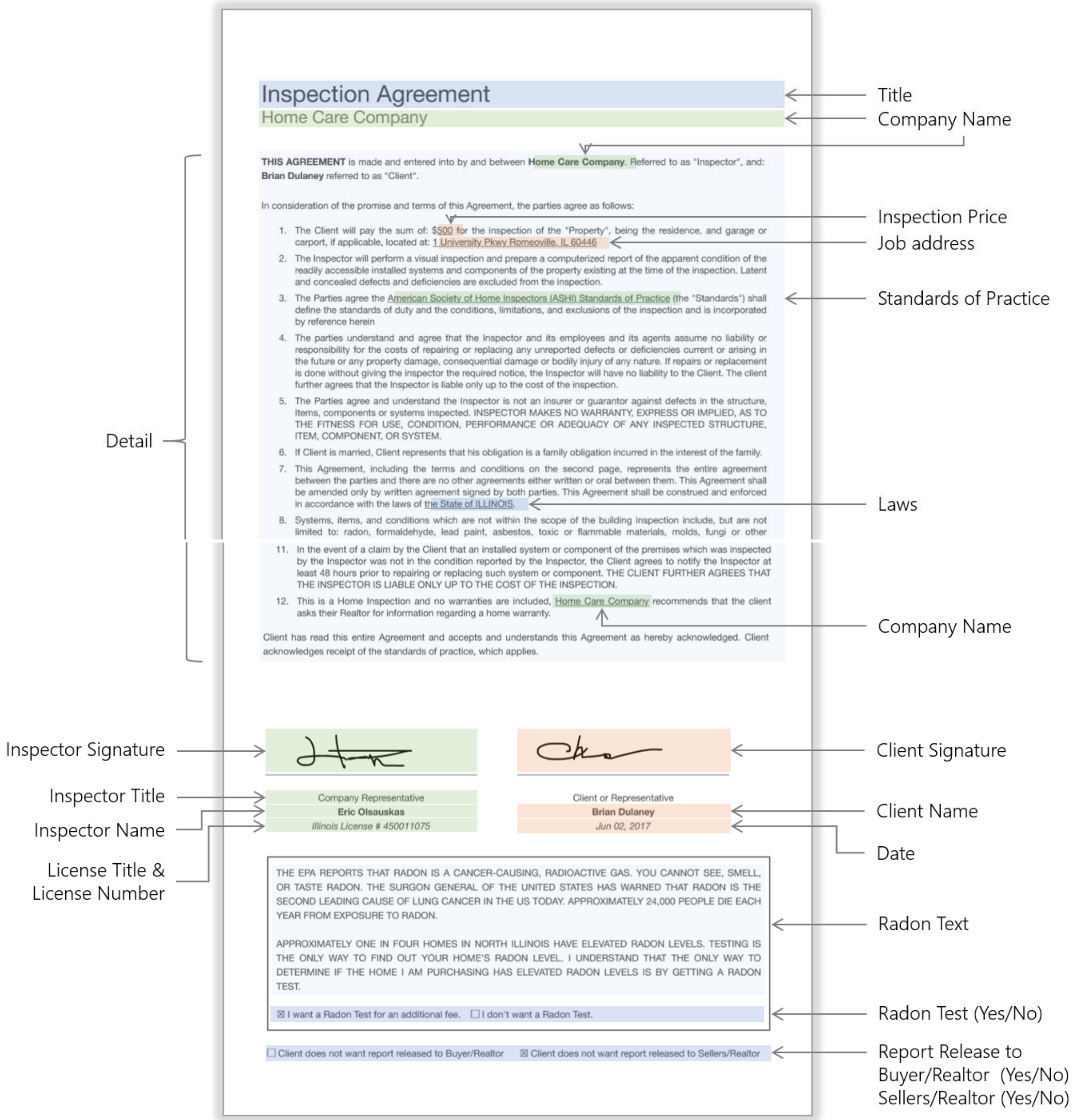


Figure 46 - Report agreement

Property	Description
Enable	Show or hide this chapter.
Enable for Checklist	Show or hide cover page when exporting as a Negotiation Checklist.
Font Size	Font size in pixel (px)
Line Spacing	Line spacing in %
Title	Title of this chapter. (To be shown in table of content)
Detail	Detail of this chapter – agreement.
Laws	Select applicable laws to be appeared in the content of the agreement.
Client title	To be shown under a client signature.
Show Radon	Choose whether to show or hide the information about radon test at the bottom of the page.
Radon Text	Text describing radon test.
Radon Test	Choose whether client want to have the radon test – will be displayed as check boxes.
Report release to buyer/realtor	Choose whether client want to disclose this report to buyer/realtor – will be displayed as check boxes. Choose “None” to hide.
Report release to sellers/realtor	Choose whether client want to disclose this report to buyer/realtor – will be displayed as check boxes. Choose “None” to hide.

Table 12 - Properties for agreement

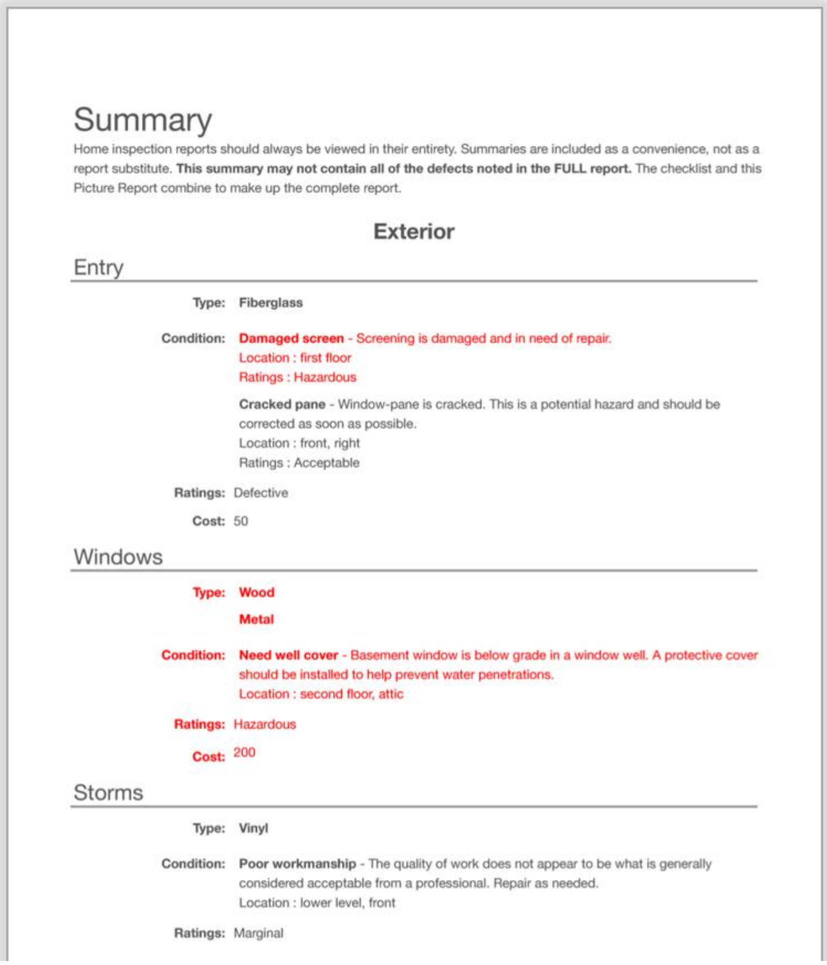
Standards of Practice

Property	Description
Enable	Show or hide this chapter.
Enable for Checklist	Show or hide cover page when exporting as a Negotiation Checklist.
Title	Title of this chapter. (To be shown in table of content)
PDF File	Select a PDF file to be included in the report.

Table 13 - Properties for Standard of Practice

Highlight paragraphs with text marker

When a keyword(s) is found in the paragraph, the entire paragraph will be highlighted. By default, “**Hazardous**” is set as a keyword and any paragraph containing this word will be highlighted. Follow the below sections to customize the settings.



Summary

Home inspection reports should always be viewed in their entirety. Summaries are included as a convenience, not as a report substitute. **This summary may not contain all of the defects noted in the FULL report.** The checklist and this Picture Report combine to make up the complete report.

Exterior

Entry

Type: **Fiberglass**

Condition: **Damaged screen** - Screening is damaged and in need of repair.
Location : first floor
Ratings : Hazardous

Cracked pane - Window-pane is cracked. This is a potential hazard and should be corrected as soon as possible.
Location : front, right
Ratings : Acceptable

Ratings: Defective

Cost: 50

Windows

Type: **Wood**
Metal

Condition: **Need well cover** - Basement window is below grade in a window well. A protective cover should be installed to help prevent water penetrations.
Location : second floor, attic

Ratings: Hazardous

Cost: 200

Storms

Type: **Vinyl**

Condition: **Poor workmanship** - The quality of work does not appear to be what is generally considered acceptable from a professional. Repair as needed.
Location : lower level, front

Ratings: Marginal

Figure 47 - Highlight paragraphs with text marker

Change text marker mode

By default, marker is set to highlight paragraph in “**Red**”. You can change this by changing the report property named “**Text Marker**” under “**Page Settings**” section. Available options are “Bold”, “Bold and underline”, “Underline”, “Red” and “None”.

Add/remove keywords

Go to report property named "**Keywords for text marker**" under "**Page Settings**" section.

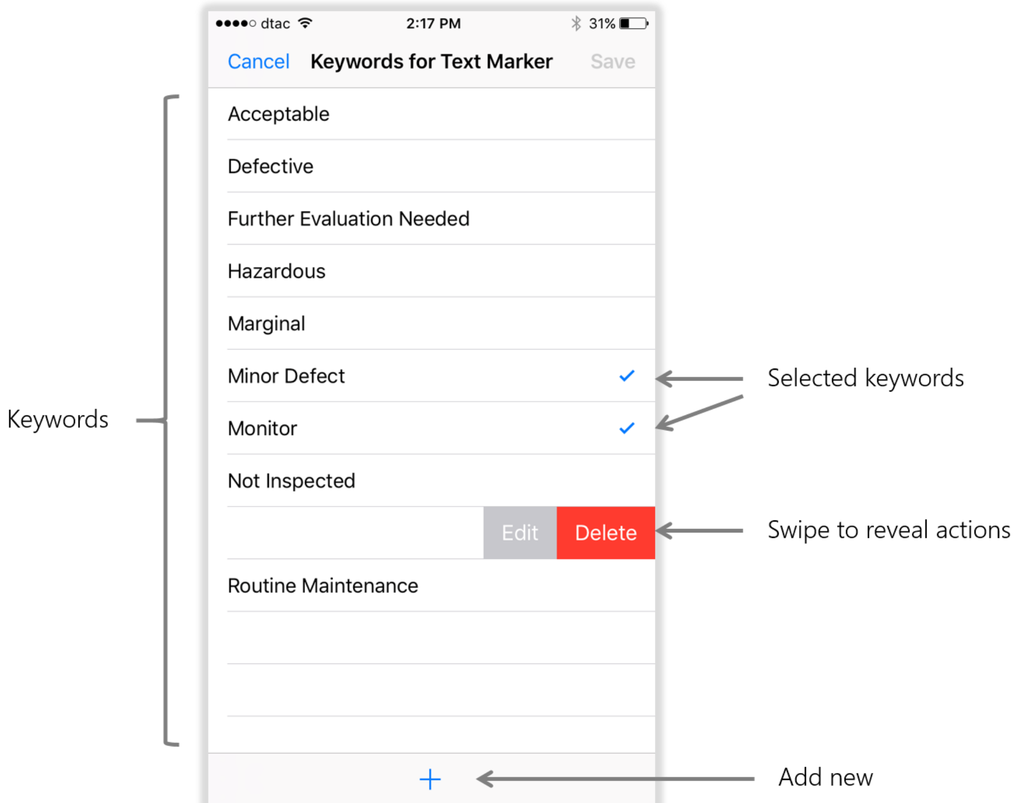


Figure 48 - Customizing keywords for text marker

a. To select a keyword(s), tap any row. Tap again to unselect.
b. To add a new/customized keyword to the list, click add button at the bottom of the page. Then fill in the information:
    - **Name** – type a keyword to be added.
    - **Subtitle (Optional)** – left blank.
    - **Data** (Optional) – left blank.
c. To remove or edit existing keyword(s) shown in the list, swipe row to the left to reveal options. Choose "**Edit**" or "**Delete**" to edit or remove keyword respectively.

Sort objects by ratings

Objects shown in the report can be ordered based on their rating numbers – objects with higher rating numbers have higher priority and will appear before those with lower rating numbers. For example, an object with "Hazardous" rating will appear before an object with "Minor Defect" which has lower rating number. By default, rating number are set to values as shown in Table 14 - Rating and priority.

Rating	Priority
Hazardous	14 (highest)
Further Evaluation Needed	13
Significantly deficient	12
Defective	11
Adjustment or repair needed	10
Should be installed	9
Maintenance required	8
Needs to be serviced	7
Routine maintenance	6
Marginal	5
Minor defect	4
Monitor	3
Common element / Check with association	2
Satisfactory / Acceptable	1
Not inspected	0 (lowest)

Table 14 - Rating and priority

Enable/disable sort by rating

1. Go to property named "**Sort by rating**" under "**System**" section or "**System summary**" section.
2. Change its value to "**Yes**" or "**No**" to enable or disable this feature respectively.

Change rating priority

1. At object window, tap the property named "**Ratings**" to open available options.
2. Swipe the row to the left to reveal actions. Select "**Edit**".
3. Change the information
    a. **Name** – rating name.
    b. **Subtitle (Optional)** – alternative name for translation purpose.
    c. **Data (Optional)** – priority number.
4. Click "**Save**".

Code referencing

Code referencing is a way to put dynamic data in the report, so the content can be automatically changed according to the given data. Special codes are placed in plain text to tell the renderer to replace those codes with corresponding data upon rendering (Figure 49).

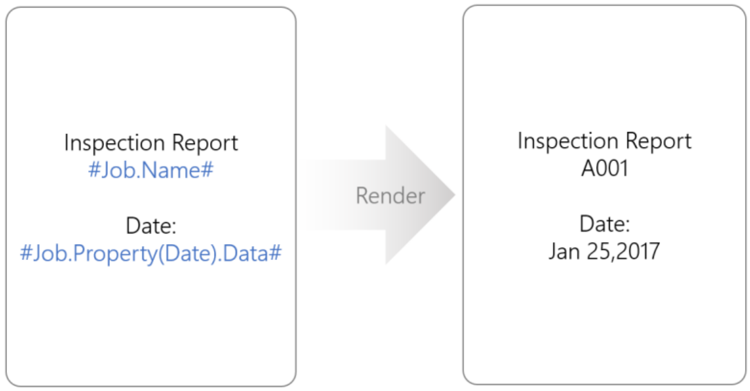


Figure 49 - Code referencing process

Figure 50 is an example result of a rendered report agreement that use code referencing.

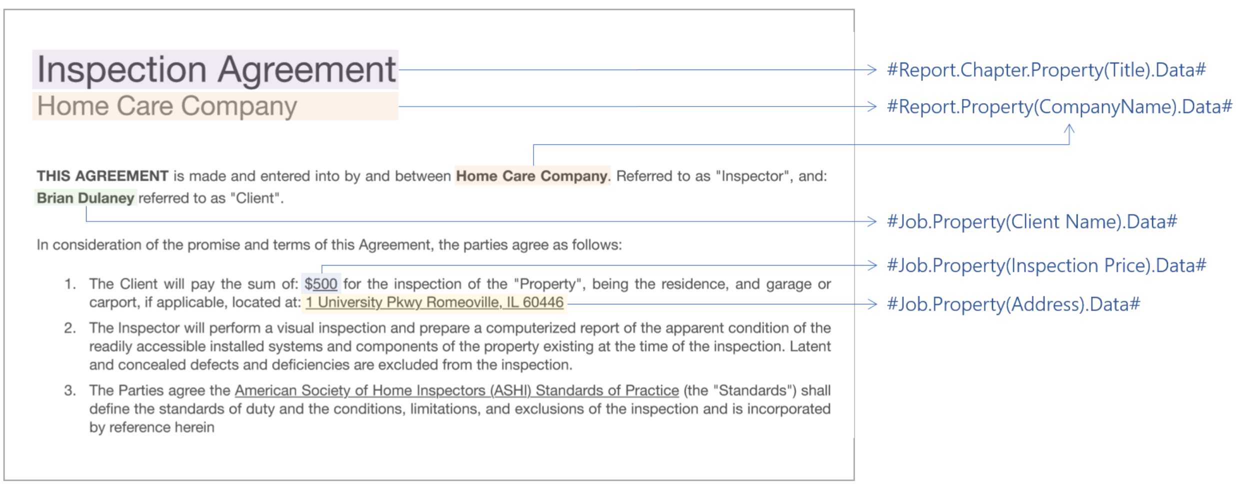


Figure 50 - Code referencing example

You can put code referencing anywhere in any text or paragraph. Common places that you can put code referencing are report properties (page 47), report chapters (page **Error! Bookmark not defined.**) and report theme files (page 93).

To make code referencing recognizable by the renderer, they must be enclosed with “#” and written exactly in the right format. Figure 51 summarize the available code referencing.

Job	
Name	#Job.Name#
Properties	#Job.Property(*).Name# #Job.Property(*).Subtitle# #Job.Property(*).Data#

System	
Name	#Job.System.Name#
Subtitle	#Job.System.Subtitle#
Properties	#Job.System.Property(*).Name# #Job.System.Property(*).Subtitle# #Job.System.Property(*).Data#

Section	
Name	#Job.System.Section.Name#
Subtitle	#Job.System.Section.Subtitle#

Item	
Name	#Job.System.Section.Item.Name#
Subtitle	#Job.System.Section..Item.Subtitle#
Properties	#Job.System.Section.Item.Property(*).Name# #Job.System.Section.Item.Property(*).Subtitle# #Job.System.Section.Item.Property(*).Data#

Part	
Name	#Job.System.Section.Item.Part.Name#
Subtitle	#Job.System.Section..Item.Part.Subtitle#

Object	
Name	#Job.System.Section.Item.Part.Obj.Name#
Subtitle	#Job.System.Section..Item.Part.Obj.Subtitle#
Properties	#Job.System.Section.Item.Part.Obj.Property(*).Name# #Job.System.Section.Item.Part.Obj.Property(*).Subtitle# #Job.System.Section.Item.Part.Obj.Property(*).Data#

Report	
Properties	#Report.Property(*).Name# #Report.Property(*).Subtitle# #Report.Property(*).Data#

Chapter	
Name	#Report.Chapter.Name#
Subtitle	#Report.Chapter.Subtitle#
Properties	#Report.Chapter.Property(*).Name# #Report.Chapter.Property(*).Subtitle# #Report.Chapter.Property(*).Data#

Replace “*” with property name or property subtitle

Figure 51 - Code referencing guide diagram

8.4 App preferences

Some of the app functionalities can be customized or changed. For example, you can change the displayed date format throughout the app, image quality, or choose whether to automatically save photo to your camera roll when you take photos from within the app.

To manage/change app preferences, at home screen, click main menu button located at the upper left corner, then choose "**Preferences**". See Table 15 - App's Preferences for detail of each properties.

Property	Description
Date Format	Preferred date format to be displayed throughout the app and in the reports. For example, MMM dd, yyyyy is Jan 01, 2017 and MM/dd/yy is 01/01/17.
Joblist Sort By	Choose how to sort job list when load the app; by date or none.
Image Quality*	Quality of saved photos.
Photo Save to Camera Roll	Choose whether to automatically save photo to your camera roll when you take photos within the app.
Photo Timestamp	Choose whether to automatically embedded timestamp to your photos.
Photo Timestamp Font Size	Font size of the photo timestamp. Only applied when Photo Timestamp is enabled.
Photo Timestamp Font Color	Font color of the photo timestamp. Only applied when Photo Timestamp is enabled.
Exported Image Quality*	Quality of photos for exporting job.
Exported Image Size	Image size for exporting job. Choose smaller image size to reduce file size for exporting jobs.

Table 15 - App's Preferences

* Higher quality means sharper images but will take up more storage space, while lower quality reduces file size but might pixelate the photo.

Chapter 9: Job template

Note: Features described in this chapter applies only to the app with "Premium" subscription plan. To find out which plan you are in or to switch the plan see "1.3 Subscription" on page 5.

Job template stores inspection structures, properties and their default values such as a list of systems, a list of items, and a list of objects. It is also stores generic inspection data and descriptions.

You can have multiple job templates to serve different type of inspections or scenarios. For example, you can have templates in different languages for different type of customers, or different templates for different type of properties or companies.

This chapter will guide you how to manage existing job templates, modify them or create new ones.

9.1 Saving job as template

Save the changes you have made to the job structure such as customizing the object list (page 45) or modifying the job template (page 67) as a new template.

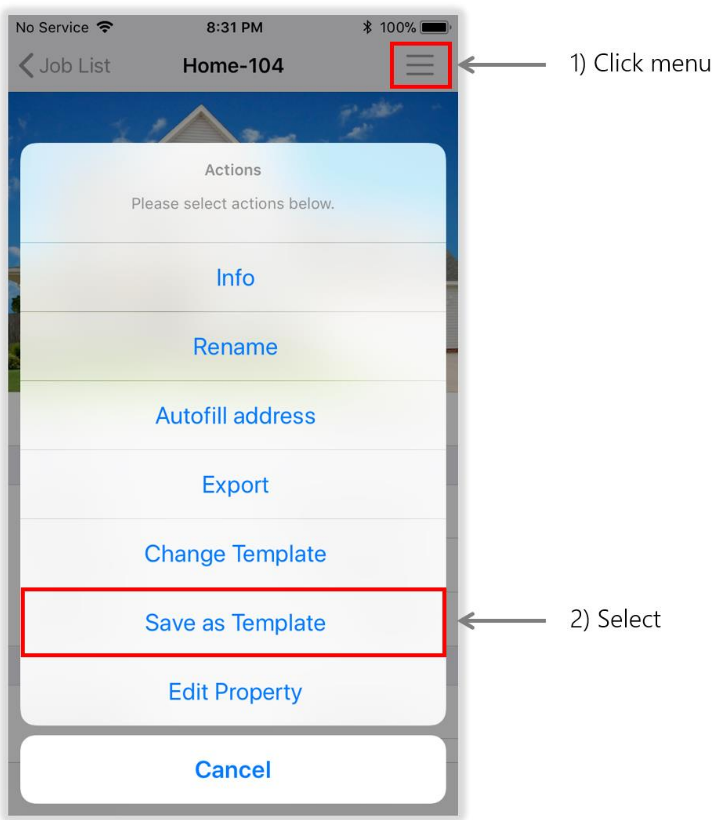


Figure 52 - Saving job as template

1. At home screen, tap a job you would like to save as job template.
2. A job window will be opened, click menu icon on the upper right corner to reveal actions. Choose “**Save as Template**”.
3. Name your new job template then hit “**Save**”.

9.2 Managing job templates

To manage job templates, click “+” button on the upper right corner of the home screen, then tap the template name to open the template list.

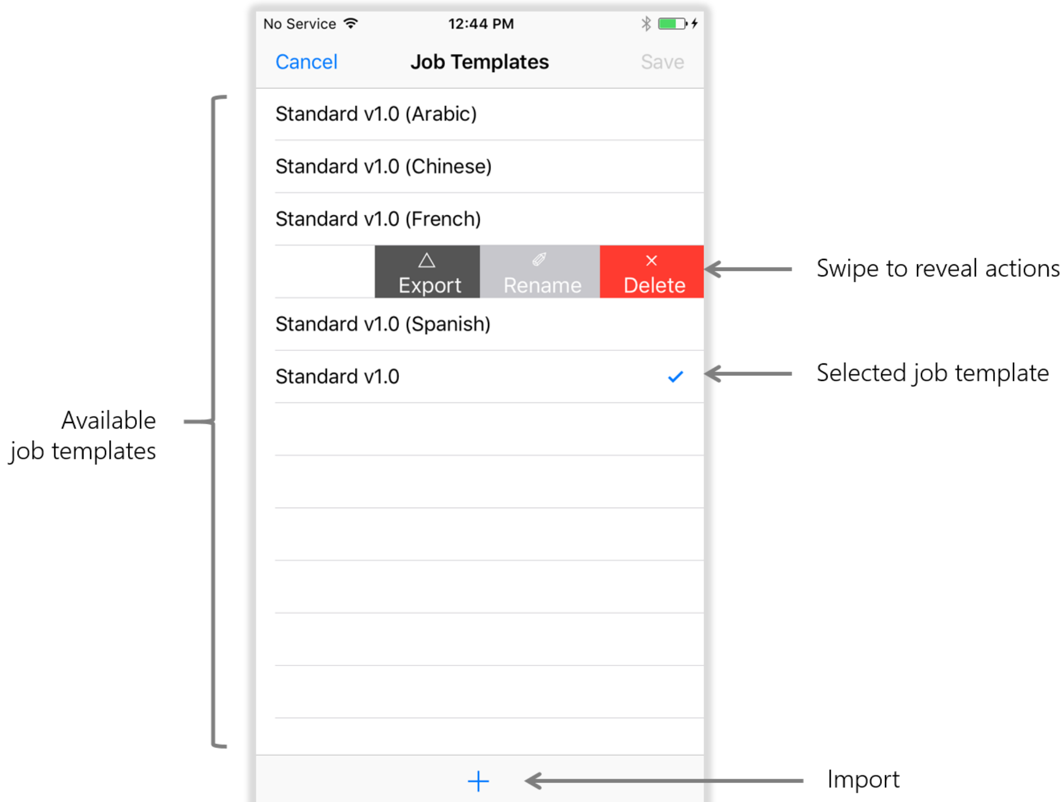


Figure 53 - Managing job templates

Rename

1. Swipe the row to reveal actions. Select “**Edit**”.
2. Type a new name, click “**Save**”

Delete

1. Swipe the row to reveal actions. Select “**Delete**”.
2. A confirming window will pop up, click “**Delete**” to confirm.

Warning: You cannot rename or delete templates when they are being used. An alert message will show up suggesting you remove any jobs that use that template first.

Export

1. Swipe the row to reveal actions. Select "**Export**".
2. Choose export options:
    a. **AirDrop** – export as a file to your mac, iPhone or iPad that support AirDrop.
    b. **Mail** – export as a file and send it via email.
    c. **Add to iCloud Drive** – save as a file on your iCloud drive.

Import from library

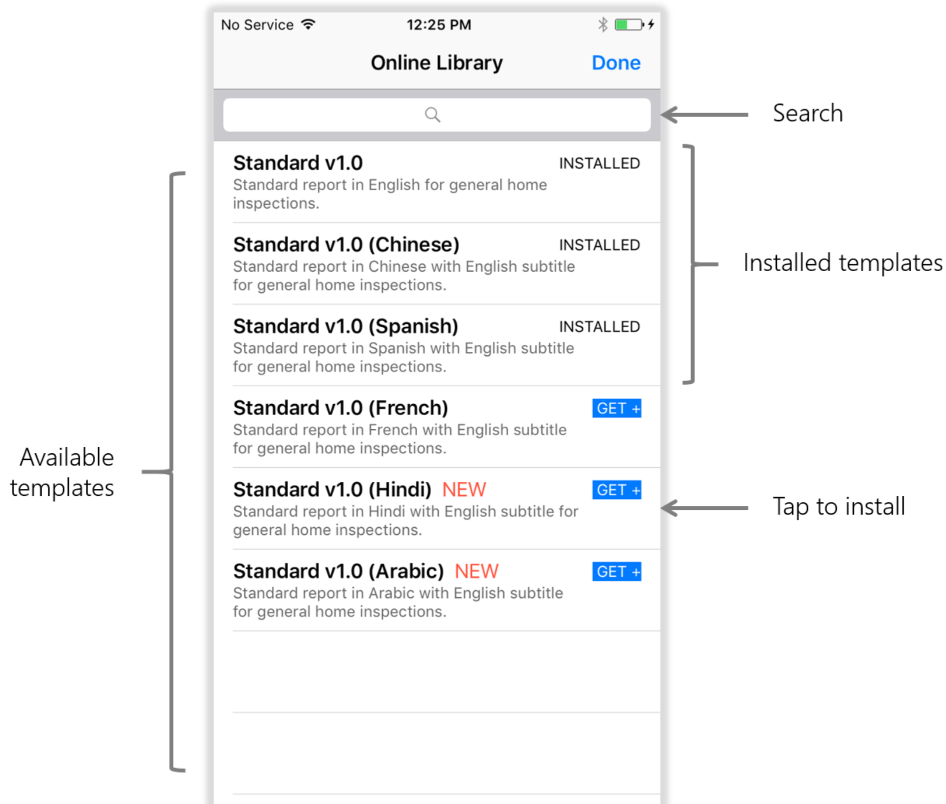


Figure 54 - Job templates from online library

1. Click "+" button at the bottom of the template list.
2. Select import option "**From library...**". Online library will be opened.
3. Browse and tap the row to get an online template. Selected template will be downloaded and installed on your device.

Import from file

1. Click "+" button at the bottom of the template list.
2. Select import option "**From file…**".
3. Browse and select your saved job template from iCloud. Selected job template will be added to the list.

Note:

- You can import only valid job template files with ".xml" extension.
- You can only browse and import files from your iCloud. If you have files on your device or elsewhere, copy or move them to your iCloud first.
- One file can be imported at a time.

Warning: If you have manually altered the code inside template file, please check the correctness of your code before importing. Code with errors might cause the app to crash.

9.3 Modifying job template

This is an advance topic that will guide you how to make change to template's structures, properties and their default values, so you can customize existing templates or create new ones that are personalized for you.

Job templates share the same hierarchical structure as jobs (see Figure 34). They consist of hierarchical nodes such as systems, items and objects. These structures can be changed such as renaming, adding a new one or editing the existing ones. Below sections will guide you how to modify the job template at each level.

Note: Changes you have made to the template will be automatically applied to the current job and any future job that shares the same template.

Job property

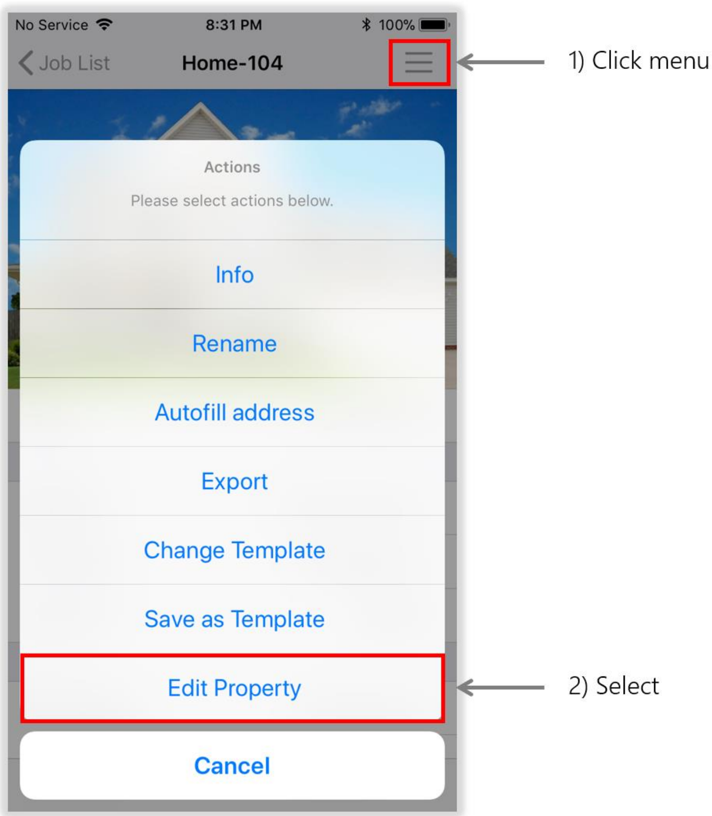


Figure 55 - Modifying job properties

1. Click menu button on the upper right corner of job window.
2. Select **"Edit Property"** to open Property Editor. See "Chapter 11: Property Editor" on page 82 to learn more about editing properties with Property Editor

System list

1. Tap edit button on the upper right corner of inspection window to switch to editor mode.
2. Tap add button at the bottom of the system list to open another window showing a list of available systems for this job template.

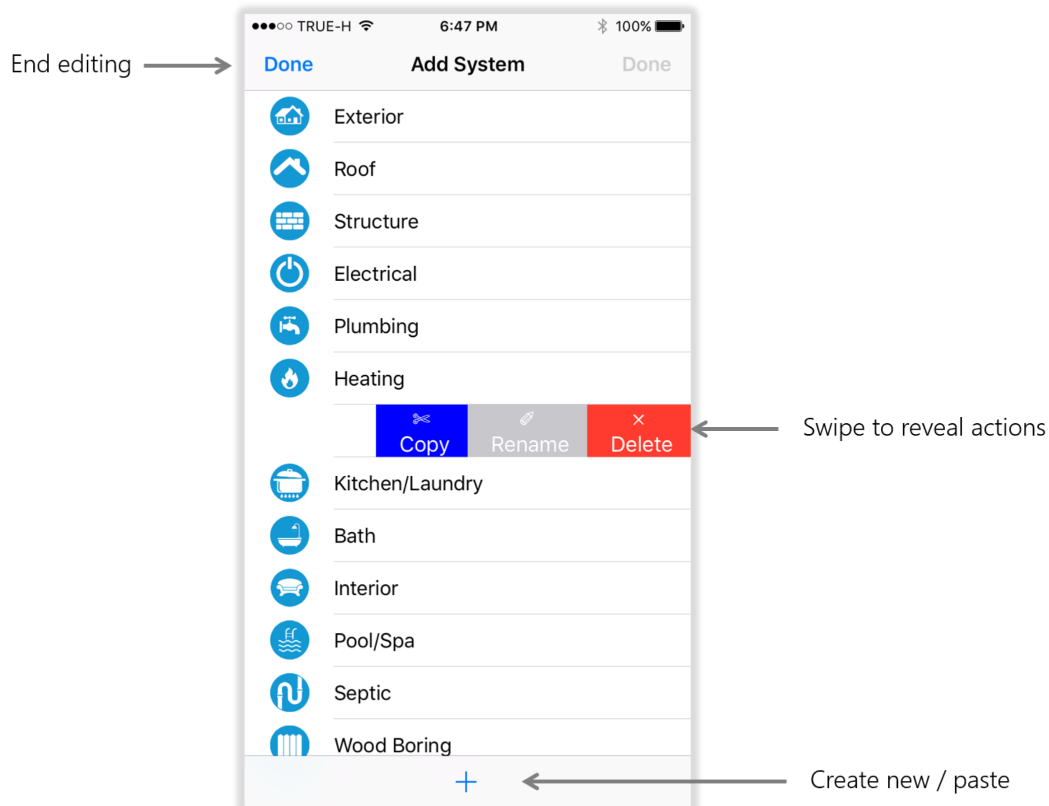


Figure 56 - Modifying job template - system list

Create new

To create a blank system and append it to the current job template:

1. Tap "+" button at the bottom of the page, select "**Create new…**".
2. Fill in information
   a. **Name** – a name of system
   b. **Subtitle (Optional)** - will be shown next to name (normally used as a translation of foreign languages).
3. Click "**Save**". A blank system will be added to the bottom of the template list.
4. Follow the rest of this chapter to complete this newly added system.

Delete

To delete a system from the current job template, swipe the row to reveal actions, select "**Delete**" to confirm.

> **Warning**: Jobs are linked to job template. Modifying the template will affect future jobs as well as saved ones. Jobs that are linked to the missing template will be partially or entirely inaccessible.

Rename

1. Swipe the row to reveal actions, select “**Rename**”.
2. Change the information:
    a. **Name** – a name of system
    b. **Subtitle (Optional)** - will be shown next to name (normally used as a translation of foreign languages).
3. Click “**Save**”.

Copy & paste

1. Swipe the row to reveal actions, select “**Copy**”.
2. Tap “+” at the bottom, select “**Paste**”. The system and its substructure will be cloned.

Reorder

1. Click “**Edit**” on the upper left corner to enter editing mode.
2. Press and hold bar button of the row, then drag and drop to reorder.

System property

Click menu button on the upper right corner of system window, then select “**Edit Property**” to modify system property. See “Chapter 11: Property Editor” on page 82 to learn more about editing properties with Property Editor.

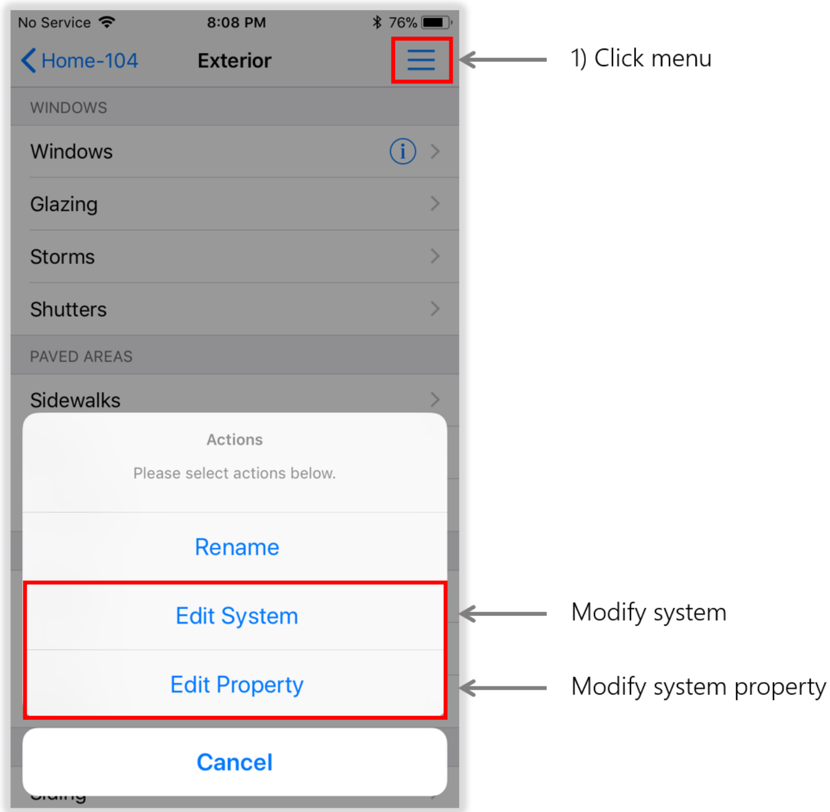


Figure 57 - Modifying system & system property

System

Click menu button on the upper right corner of system window, then select “**Edit System**” to modify system (Figure 57).

Section

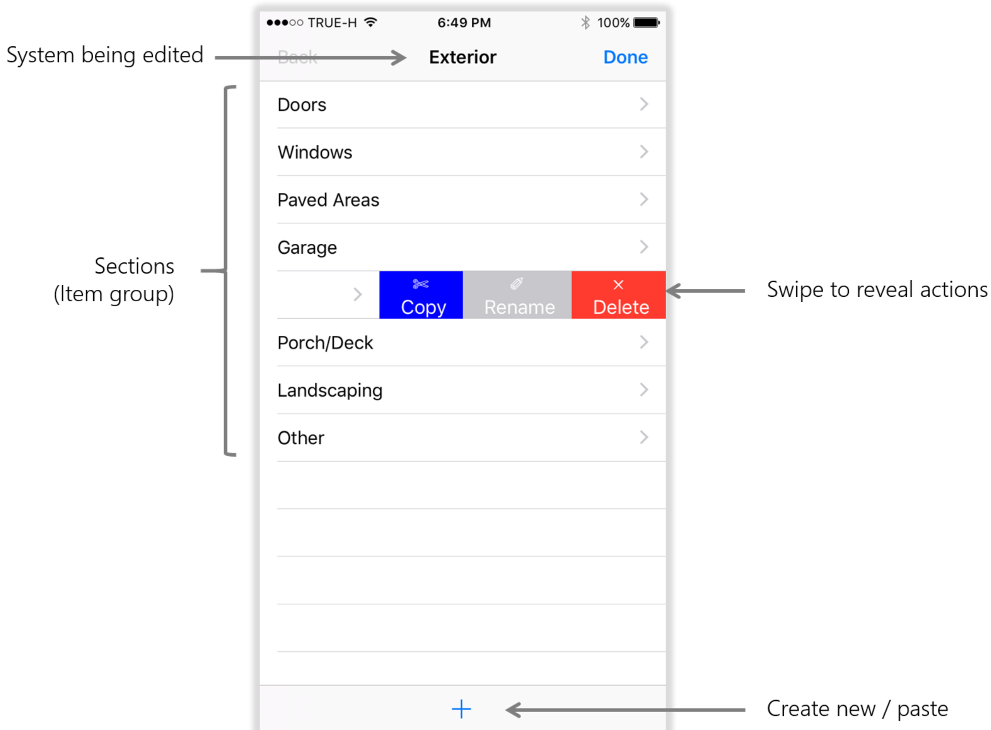


Figure 58 - Modifying section

Create new

1. Tap "+" at the bottom of the page, select "**Create new…**".
2. Fill in the information
   a. **Name** – a name of section
   b. **Subtitle (Optional)** - will be shown next to name (normally used as a translation of foreign languages).
3. Click "**Save**". A new blank section will be added to the bottom of the list.
4. Follow the rest of this chapter to complete this newly added system.

Delete

1. Swipe the row to reveal actions, select "**Delete**" to confirm.

Rename

1. Swipe the row to reveal actions, select "**Rename**".
2. Change information and click "**Save**".

Copy & paste

1. Swipe the row to reveal actions, select "**Copy**".
2. Tap "+" at the bottom of the page, select "**Paste**". The copied section and its substructure will be cloned.

Reorder

1. Click "**Edit**" on the upper left corner to enter editing mode.
2. Press and hold bar button of the row, then drag and drop to reorder.

Item

To modify items under each section, tap any section in the list (Figure 58) to reveal items.

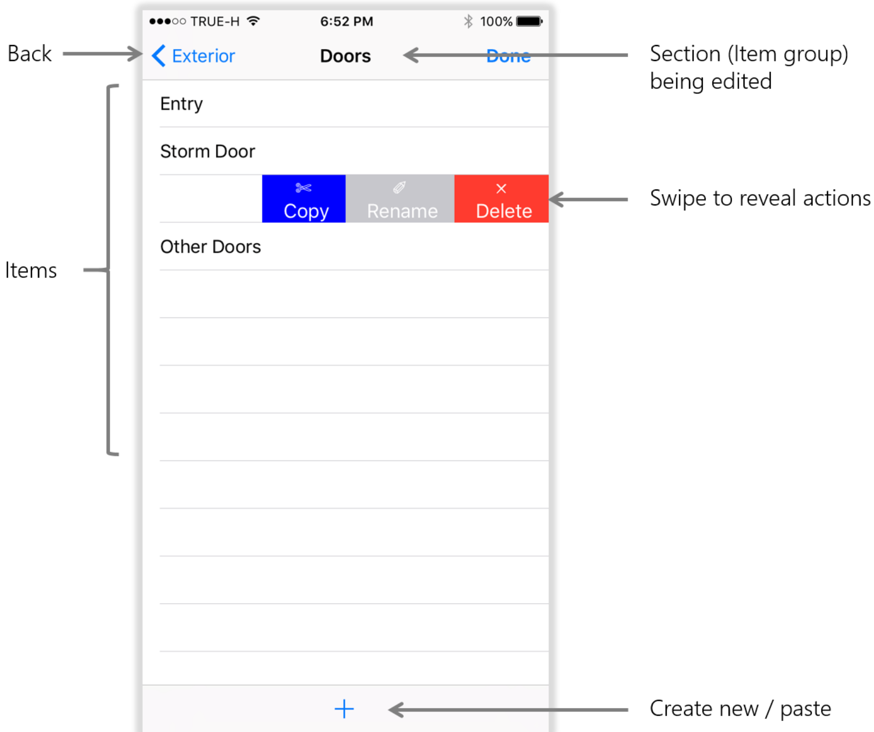


Figure 59 - Modifying item

Create new

1. Tap add button (+) at the bottom of the page, select "**Create new…**".
2. Fill in the information
    a. **Name** – a name of item
    b. **Subtitle (Optional)** - will be shown next to name (normally used as a translation of foreign languages).
3. Click "**Save**". A new blank item will be added to the bottom of the list.

Delete

1. Swipe the row to reveal actions, select "**Delete**" to confirm.

Rename

1. Swipe the row to reveal actions, select "**Rename**".
2. Change information and click "**Save**".

Copy & paste

1. Swipe the row to reveal actions, select "**Copy**".
2. Tap "+" at the bottom of the page, select "**Paste**". The item and its substructure will be cloned.

Reorder

1. Click "**Edit**" on the upper left corner to enter editing mode.
2. Press and hold bar button of the row, then drag and drop to reorder.

Item property

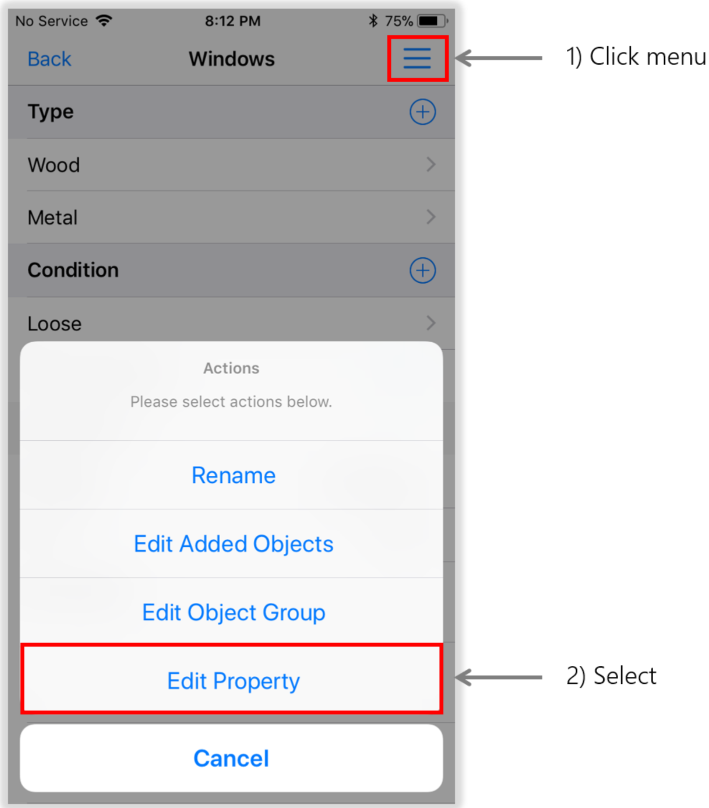


Figure 60 - Modifying item property

1. Click menu button on the upper right corner of item window.
2. Select "**Edit Property**" to open Property Editor.
3. Select "Local" or "Global" property from the navigation bar:
    a. **Local** – Properties defined here are applied only to the selected item.
    b. **Global** – Properties defined here are applied for every item throughout the inspection.

See "Chapter 11: Property Editor" on page 82 to learn more about editing properties with Property Editor.

Object Group

Click menu button on the upper right corner of item window, then select “**Edit Object Group**”.

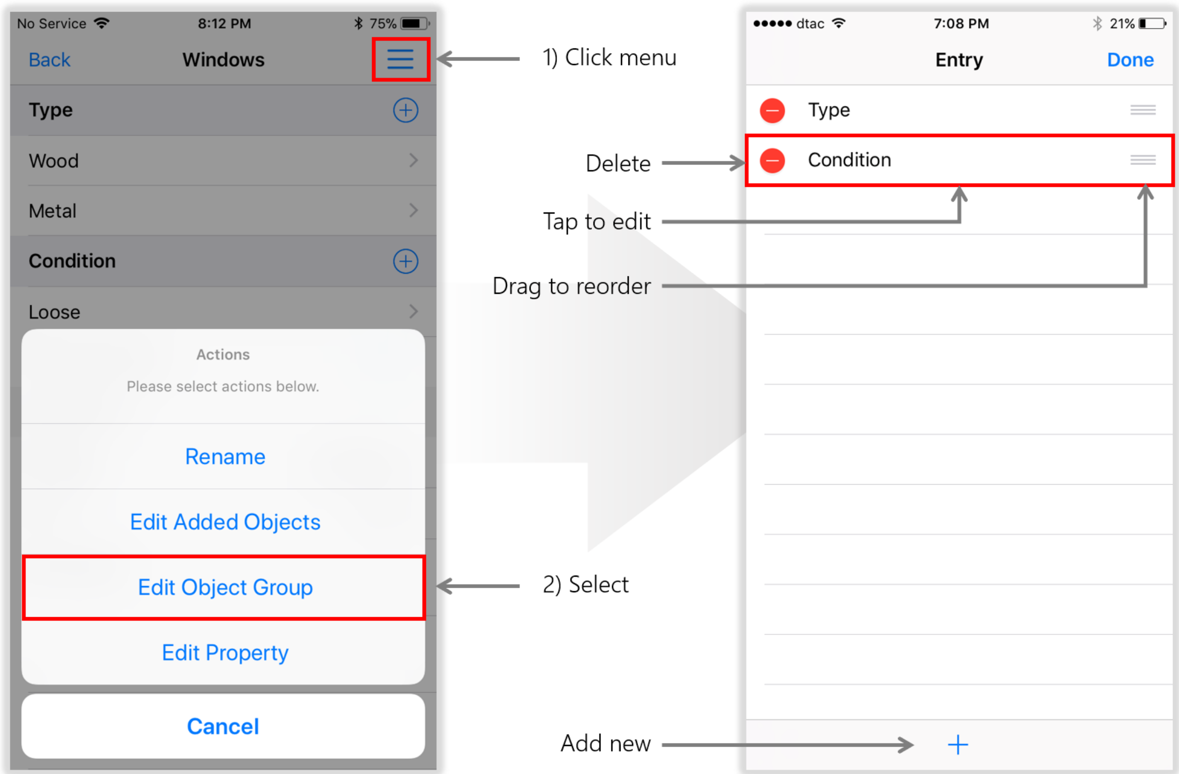


Figure 61 - Modifying object group

Add

1. Tap add button (+) at the bottom of the page.
2. Fill in information
    a. **Name** – a name of item
    b. **Subtitle (Optional)** - will be shown next to name (normally used as a translation of foreign languages).
3. Click “**Save**”. A new blank object group will be added to the bottom of the list.

Remove

1. Tap remove icon in front of the row you would like to remove.
2. Select “**Delete**” to confirm.

Reorder

1. Press and hold three-bar button on the left of the row you would like to reorder.
2. Drag and drop rows to reorder as desire.

Edit

1. Tap any row you would like to edit to open editing window.
2. Change information, then click “**Save**”.

Object property

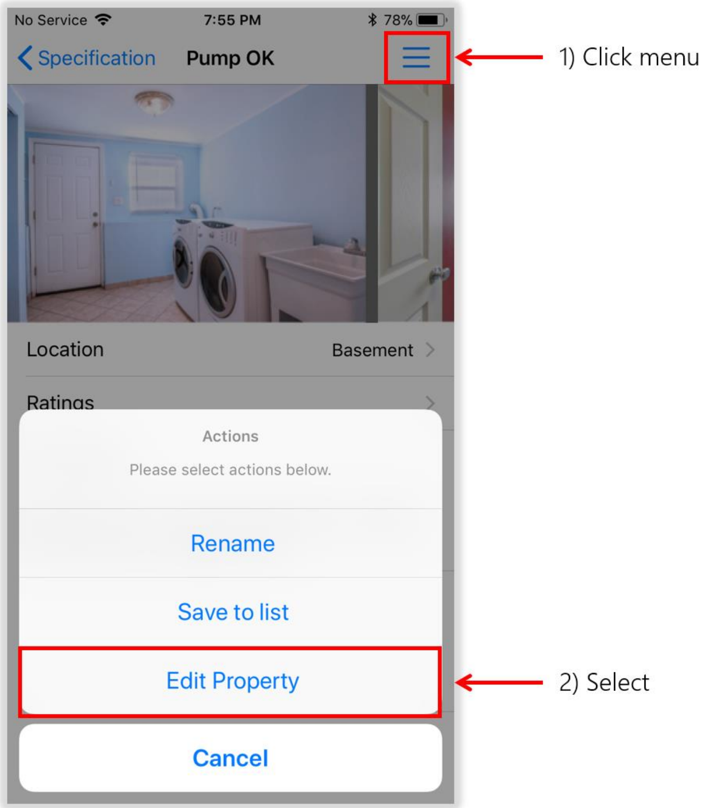


Figure 62 - Modifying object property

1. Click menu button on the upper right corner of object window.
2. Select "**Edit Property**" to open Property Editor.
3. Select "Local" or "Global" property from the navigation bar:
    a. **Local** – Properties defined here are applied only to the selected object.
    b. **Global** – Properties defined here are applied for every object throughout the inspection.

See "Chapter 11: Property Editor" on page 82 to learn more about editing properties with Property Editor.

Chapter 10: Report template

Note: Features described in this chapter applies only to the app with “Premium” subscription plan. To find out which plan you are in or to switch the plan see “1.3 Subscription” on page 5.

Saving report as a template allows you to instantly apply settings you’ve customized earlier to other reports. Also, having multiple template allows you to quickly switch back and forth between two or more set of report configurations, so you can apply different set of layout and format for different customer or scenarios in just a few clicks.

Tips: A report template with the same name as job template you are using will be automatically applied to your report by default. You can change this by switching the report template, or override the default template with the one you use the most. See “10.2 Switching report template” on page 76.

10.1 Saving report as template

Export your current customized report settings as a template so you can apply those settings for future reports.

1. Click menu button on the upper left corner of report setting window to reveal actions, choose “**Save as Template**”.
2. Name your report template and click “**Save**”. A new template will be saved and applied to your current report.
3. To apply this template for other report, see “10.2 Switching report template” on page 76.

10.2 Switching report template

1. Click menu button on the upper left corner of report setting window to reveal actions, choose “**Switch Template**”.
2. Select a template from template list. Click “**Save**”.

10.3 Managing report templates

To manage report templates, click menu button on the upper left corner of report setting window, then select “**Switch Template**” to open the template list.

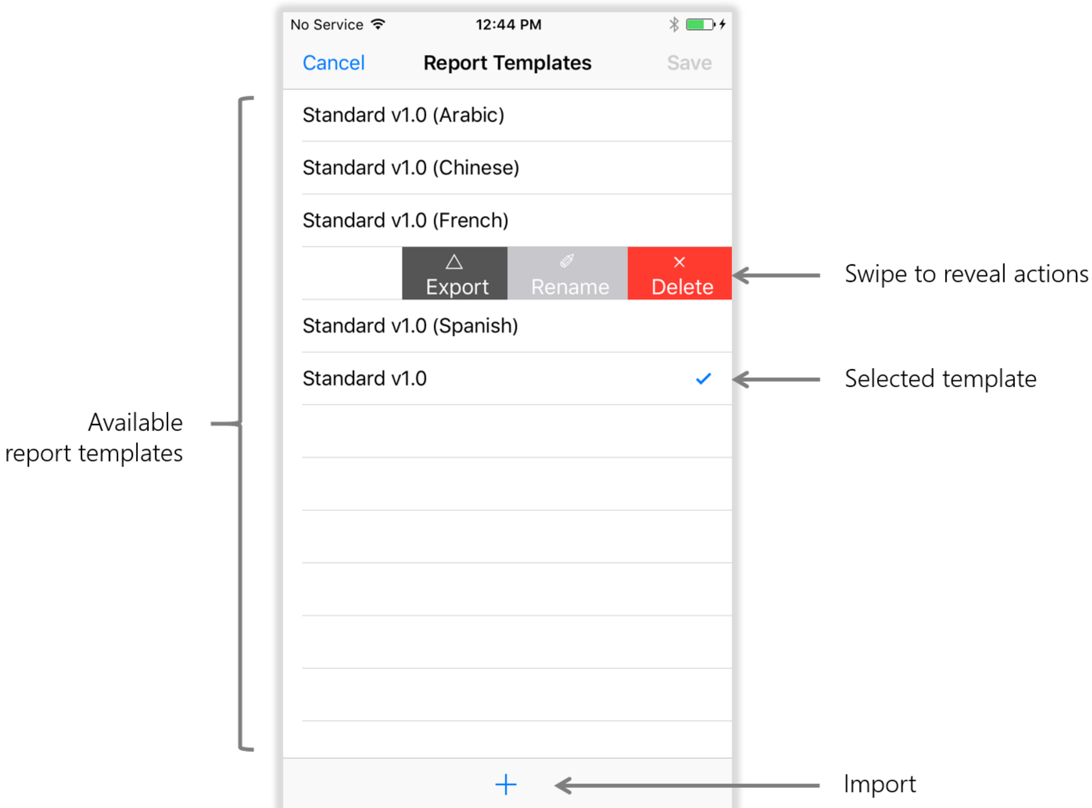


Figure 63 - Managing report template

Rename

1. Swipe the row to reveal actions. Select “**Edit**”.
2. Type a new name. Click “**Save**”.

Delete

1. Swipe the row to reveal actions. Select “**Delete**”.
2. A confirming window will pop up, click “**Delete**” to confirm.

Export

1. Swipe the row to reveal actions. Select “**Export**”.
2. Choose export options:
    a. **AirDrop** – export as a file to your mac, iPhone or iPad that support AirDrop.
    b. **Mail** – export as a file and send it via email.
    c. **Add to iCloud Drive** – save as a file on your iCloud drive.

Import from library

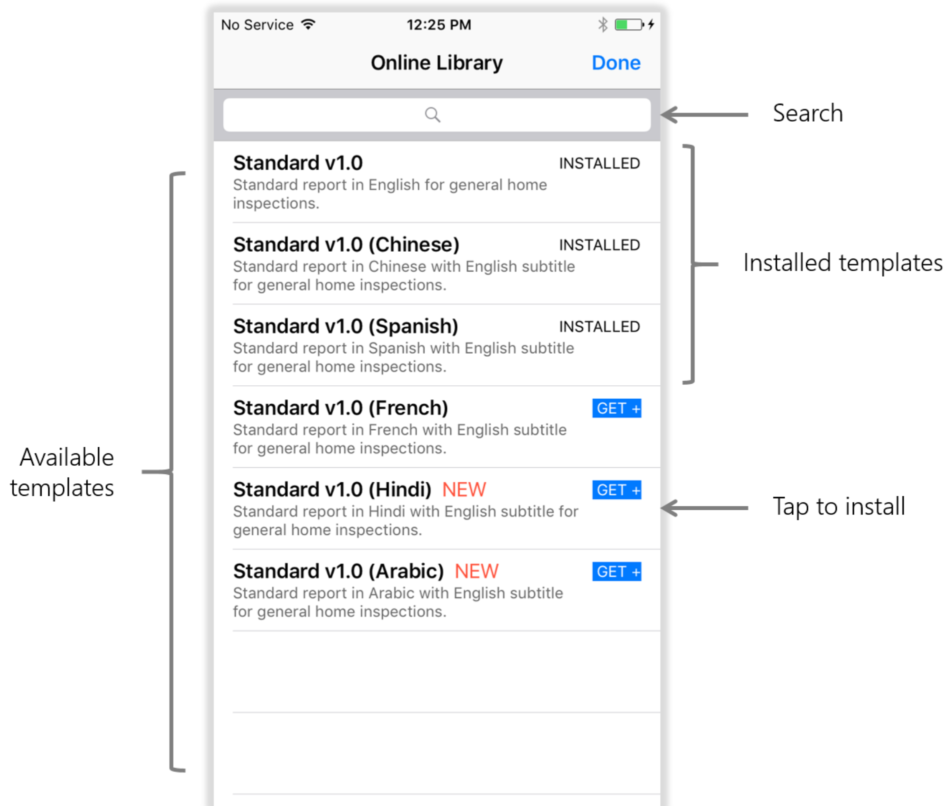


Figure 64 - Report templates from online library

1. Click "+" button at the bottom of the template list. Select import option "**From library…**".
2. Online library will be opened. Browse and tap the row to get an online template. Selected template will be downloaded and installed on your device.

Import from file

1. Click "+" button at the bottom of the template list. Select import option "**From file…**".
2. iCloud Drive window will be opened. Browse and select your saved report template. Selected report template will be added to the list.

Note:
- You can select only report template files with ".xml" extension.
- You can only browse and import files from your iCloud. If you have files on your device or elsewhere, copy or move them to your iCloud first.
- One file can be imported at a time.

Warning: If you have altered the code inside template file, please double check your code before importing. Unexpected codes or wrong formats may create errors or cause the app to crash.

10.4 Modifying report template

This is an advance topic that will guide you how to make change to the template's structures, properties and their default values, so you can customize existing templates or create new ones that are personalized for you.

Report templates share the same hierarchical structure as report (see Figure 34). They consist of hierarchical nodes – report and chapters. These structures can be changed such as renaming, adding a new one or editing the existing ones.

To modify report template, click menu on the upper left corner of report settings window, then select "**Edit Template**" to open report template editor.

> **Note**: Changes you have made to the template will be automatically applied to the current report and any future report that share the same template.

Modifying report property

1. Tap any chapter from the list to reveal its properties.
2. Tap any property to open Property Editor. See "Chapter 11: Property Editor" on page 82 to learn more about editing properties with Property Editor.

Modifying chapter

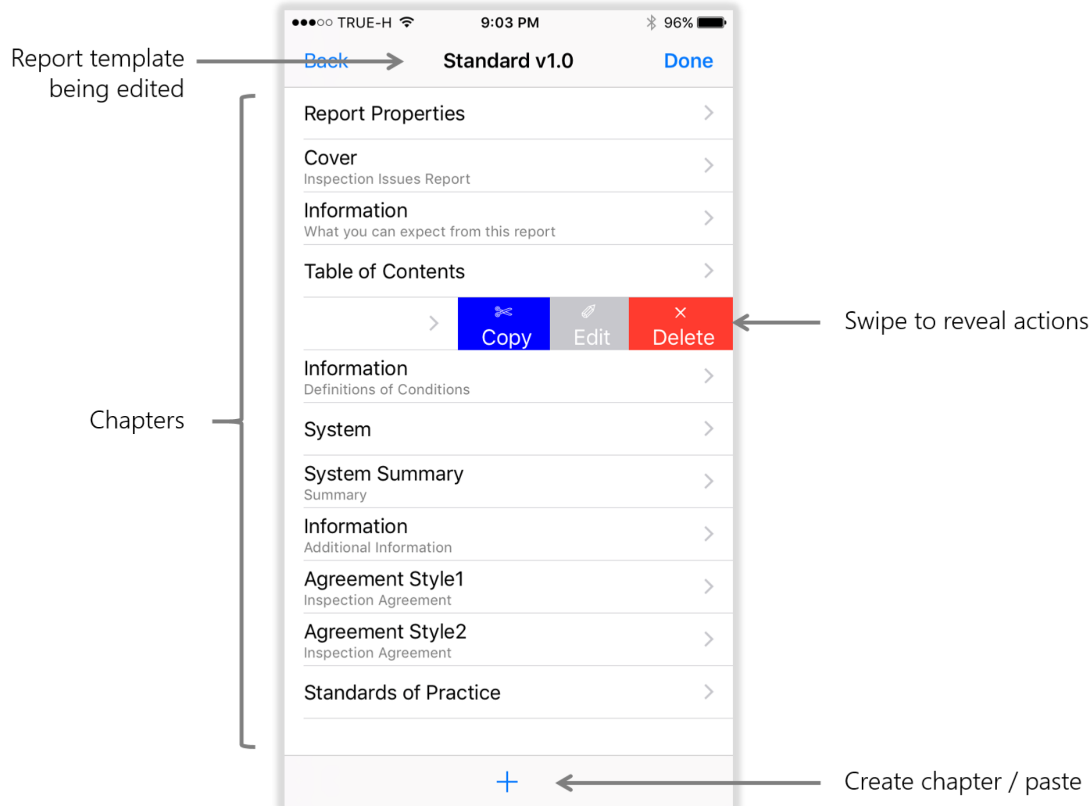


Figure 65 - Modifying chapter and its properties

Create new

Tap "+" button at the bottom of the page, select "**Create new…**". A new chapter will be added to the bottom of the list.

Delete

Swipe the row to reveal actions, select "**Delete**" to confirm.

Edit

1. Swipe the row to reveal actions, select “**Edit**”.
2. Change the information
    a. **Name** – name of object group
    b. **Subtitle (Optional)** - will be shown next to name (normally used as a translation of foreign languages).
    c. **UI** – UI chapter name (the first part of theme file name); a reference to the corresponding report theme file. See also “12.1 How report is rendered” on page 85.
    d. **Type** – Type of chapter. Use one of the below keywords to tell renderer how to render the chapter
        - “**static**” - for rendering cover page, information page, agreement page and any other static contents.
        - “**tbc**” - for rendering table of content.
        - “**system**” – for rendering inspection content.
        - “**systemSummary**” – for rendering summary of inspection content.
3. Click “**Save**”.

Copy & paste

1. Swipe the row to reveal actions, select “**Copy**”.
2. Tap “+” at the bottom of the page, select “**Paste**”. The chapter and its substructure will be cloned.

Reorder

1. Click “**Edit**” on the upper right corner to enter editing mode.
2. Press and hold bar button of the row, then drag and drop to reorder.

Chapter 11: Property Editor

Property editor is a tool for modifying structures within the app, mainly almost everything defined under Job template (“9.3 Modifying job template” on page 67) and Report template (“10.4 Modifying report template” on 79). See the guide below to learn how to use the Property Editor.

11.1 Modify property list

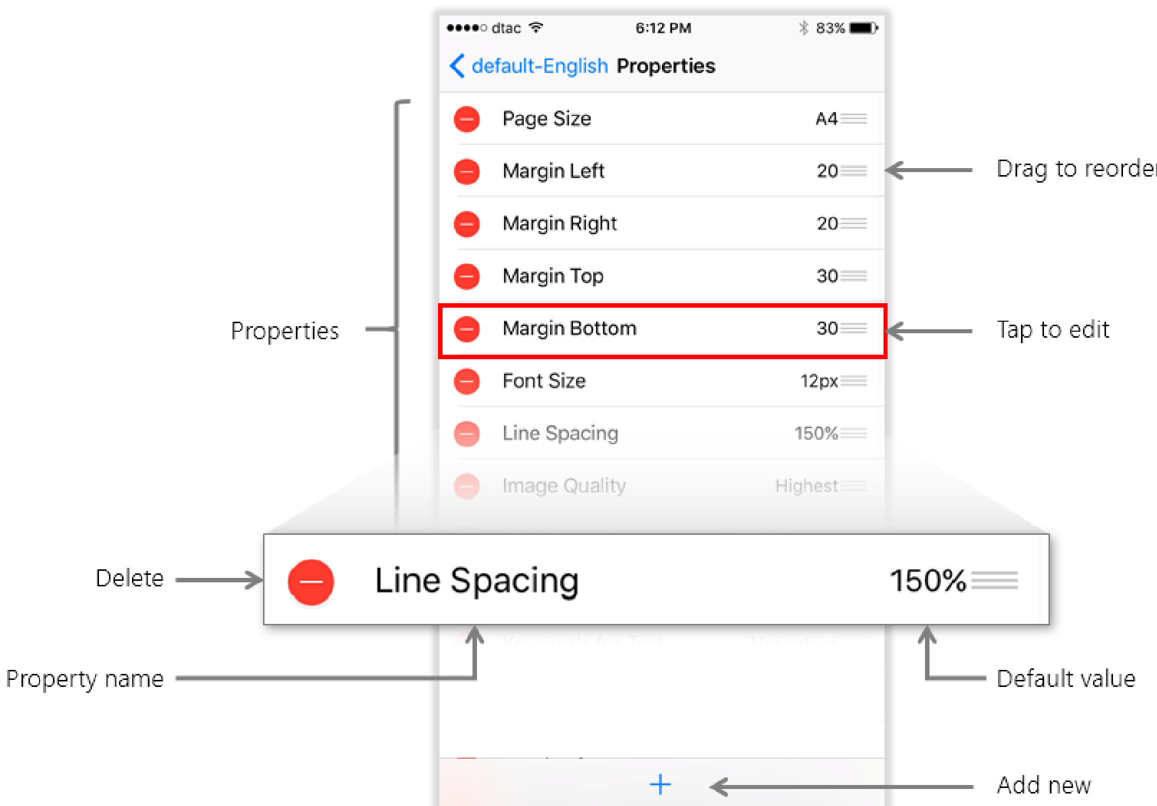


Figure 66 - Using property editor

Add

1. Tap “+” button at the bottom of the page.
2. Select a property type you would like to create:
    a. **Text** – a text box to store few words or a short sentence.
    b. **Paragraph** – a large text box to store paragraphs or long sentences.
    c. **Number** – a text box to store numeric values only.
    d. **Date** – a date picker to store date.
    e. **Checklist** – a list of multi-selectable options.
    f. **Radio** – a list of single-selectable options.
3. Fill in the information
    a. **Name** – a name of the property

b. **Subtitle (Optional)** - will be shown next to name (normally used as a translation of foreign languages).
c. **Default Value (Optional)** – a default value of this property. For property type "**Date**", value must be in "**yyyy-MM-dd**" format. For example, 2017-06-31.

4. Click "**Save**". A new property will be added to the bottom of the property list.

> **Note**: For property type "Checklist" and "Radio", an empty list will be created. To add selectable options to the list, see "11.2 Modify option list" on page 84.

Remove

Tap remove icon in front of the row you would like to remove. Select "**Delete**" to confirm.

Reorder

1. Press and hold three-bar button on the left of the row you would like to reorder.
2. Drag and drop rows to reorder as desire.

Edit

1. Tap any row you would like to edit. An editing window will pop up.
2. Change information then click "**Save**".

11.2 Modify option list

This topic applies to checklist and radio property type only.

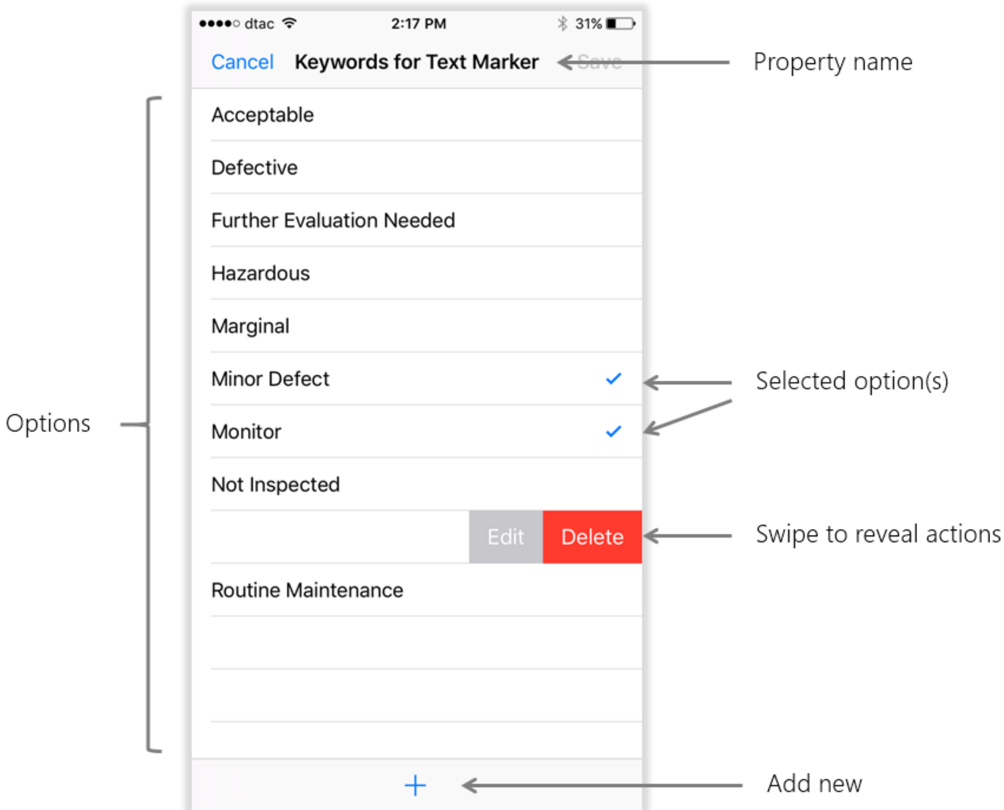


Figure 67 - Editing property list

Add new

1. Click "+" at the bottom of the list.
2. Fill in the information
    a. **Name** – a name of the option
    b. **Subtitle (Optional)** - will be shown as a translation of foreign languages.
    c. **Data (Optional)** – value (if any) for this option.
3. Click "**Save**".

Edit

1. Swipe the row to reveal actions. Select "**Edit**".
2. Change information then click "**Save**".

Delete

Swipe the row to reveal actions. Select "**Delete**".

Chapter 12: Report Theme

> **Note:** Features described in this chapter applies only to the app with "Premium" subscription plan. To find out which plan you are in or to switch the plan see "1.3 Subscription" on page 5.

Report theme is a set of HTML files containing the graphical codes of the report which defines the report graphics and layouts.

A default report theme is provided and already configured for you so in most cases there is no need to change these settings. However, if you require further customization that cannot be configured via report properties (8.3 Customizing report on page 47), customizing report theme might be a solution. This topic will guide you how to edit report theme.

12.1 How report is rendered

The report is rendered chapter by chapter, then all chapters are combined to form a final report. During rendering each chapter, a corresponding report theme file(s) is executed to create a PDF report.

Renderer identify which report theme file(s) to be used for each chapter by its name using the following convention:

> Part1_Part2_Part3.htm

Where

Part 1 is a UI chapter name

Each report chapter has a property named "UI", known as UI chapter name. This is used to refer the chapter to the corresponding theme file(s). For example, a report chapter with UI chapter name "tbc" will be directed to a theme file "tbc.htm" and all files that started with "tbc_*.htm".

> **Note**: To change UI chapter name see "Edit" on page 81.

Part 2 is a repeating component

A specific name to tell the renderer to iterate the theme file.

Part 3 is a sub-repeating component

A specific name to tell the renderer to iterate the theme file at sub-level.

The default report theme consists of a set of ".htm" files as shown in Table 16.

Part 1	Part 2	Part 3	File name
cover	-	-	cover.htm
tbc	-	-	tbc.htm
	Chapter	-	tbc_Chapter.htm
agreement	-	-	agreement.htm
info	-	-	info.htm
system	-	-	system.htm
	System	-	system_System.htm
		Property	system_System_Property.htm
	Section	-	system_Section.htm
	Item	-	system_Item.htm
		Property	system_Item_Property.htm
	Part	-	system_Part.htm
	Obj	-	system_Obj.htm
		Property	system_Obj_Property.htm
		Photo	system_Obj_Photo.htm
systemSummary	-	-	systemSummary.htm
	System	-	systemSummary_System.htm
		Property	systemSummary_System_Property.htm
	Section	-	systemSummary_Section.htm
	Item	-	systemSummary_Item.htm
		Property	systemSummary_Property.htm
	Part	-	systemSummary_Part.htm
	Obj	-	systemSummary_Obj.htm
		Property	systemSummary_Obj_Property.htm
		Photo	systemSummary_Obj_Photo.htm

Table 16 - Default report theme files

For static content, only one report theme file is used for rendering the entire report chapter. Chapters with static content, for example, are cover page, agreement page and information pages.

For dynamic content, more than one report theme files are used for rendering a report chapter. For example, table of content uses 2 files; 1) tbc.htm to render the whole page, 2) tbc_Chapter.htm to render the tbc rows (Figure 68). Chapters with dynamic content, for example, are table of content (tbc) page, system page and summary page.

Chapters with dynamic content are shown in the following figures. Color-coded boxes indicate areas where each report theme file is appeared on the report.

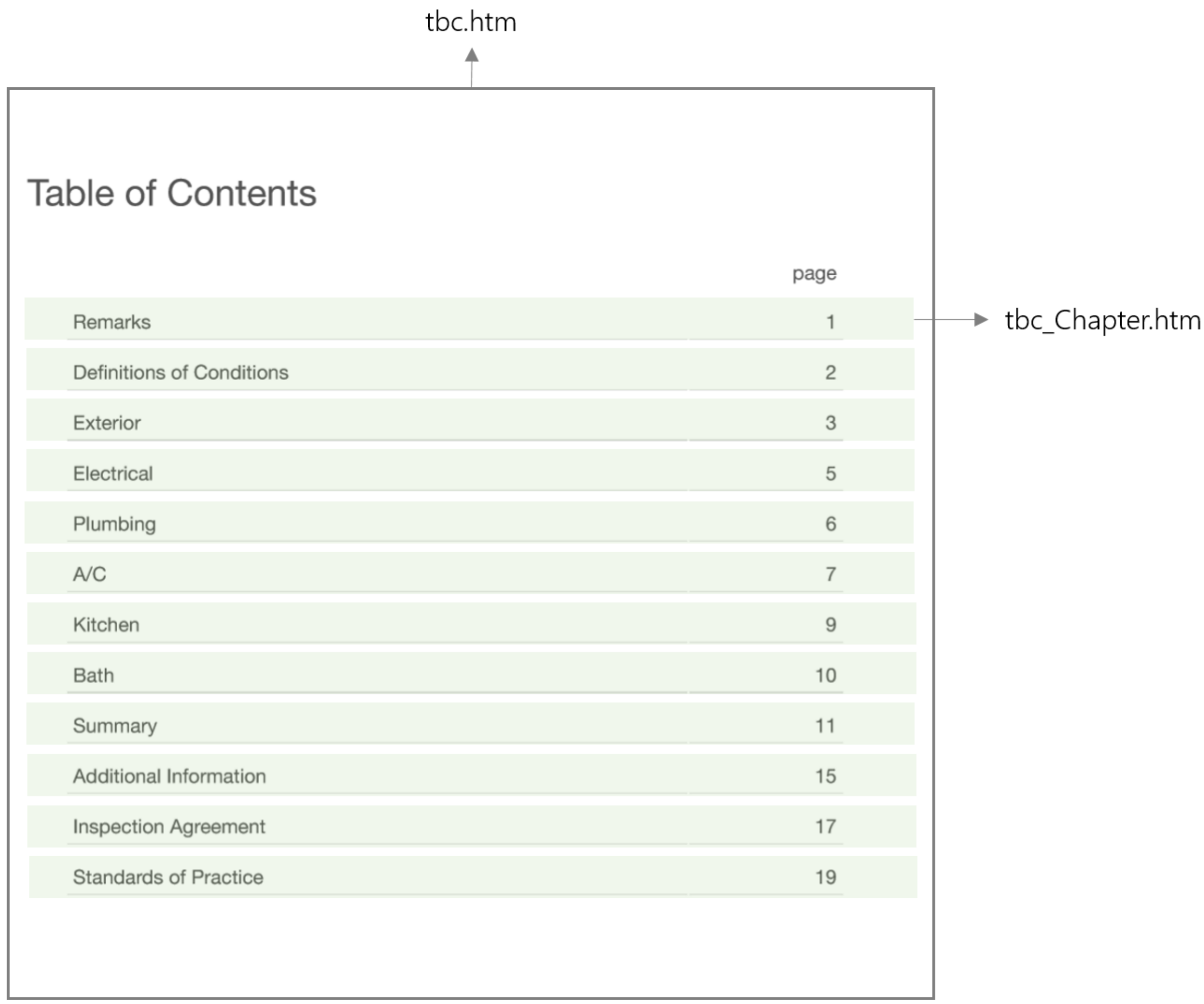


Table of Contents

	page
Remarks	1
Definitions of Conditions	2
Exterior	3
Electrical	5
Plumbing	6
A/C	7
Kitchen	9
Bath	10
Summary	11
Additional Information	15
Inspection Agreement	17
Standards of Practice	19

Figure 68 - Report's TBC with related report theme files

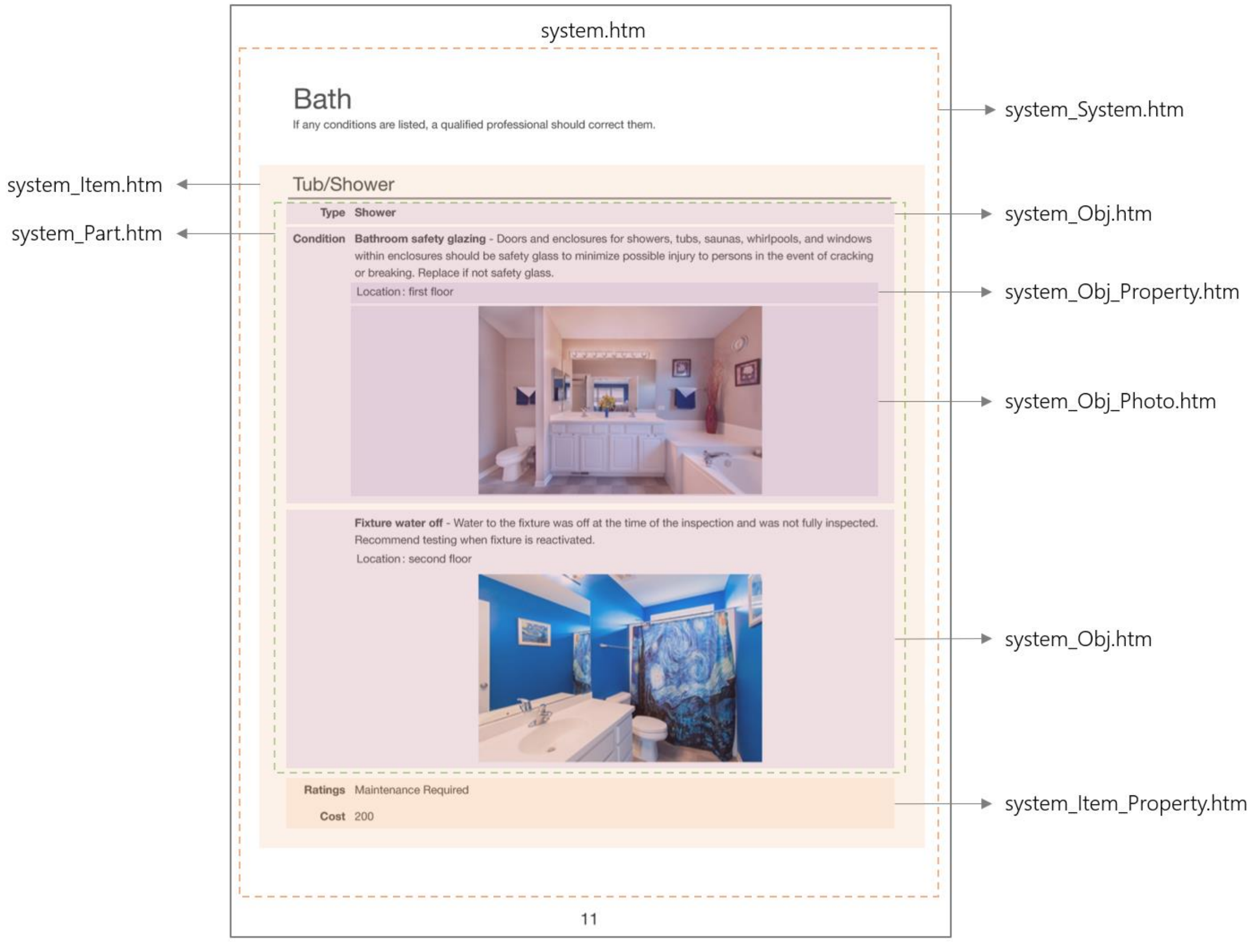


Figure 69 - Report's System with related theme files

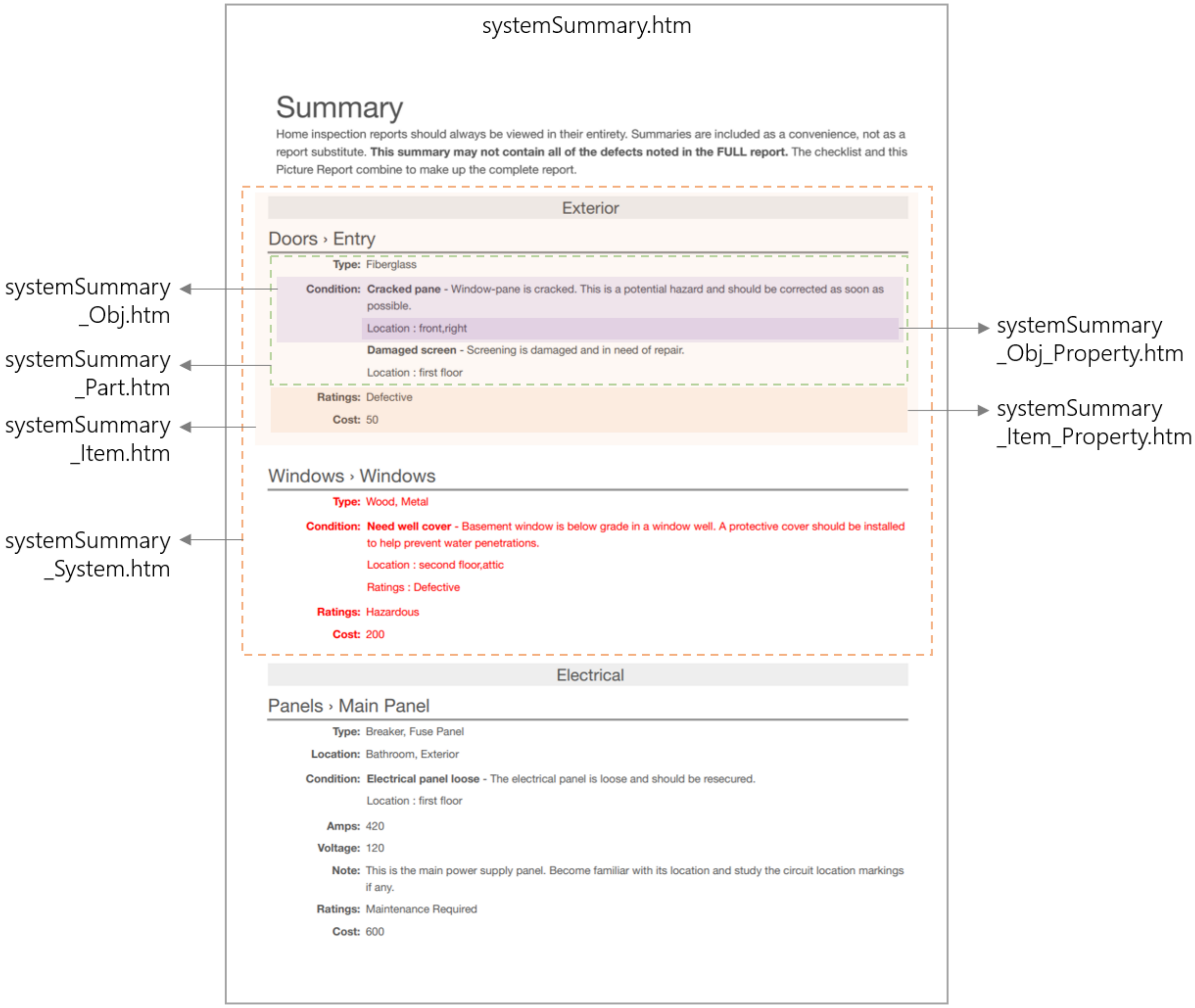


Figure 70 - Report's summary with related theme files

12.2 Managing report theme

By default, the app comes with one report theme, containing a set of report theme files. However, you can have more than one report theme and switch between them. Switching report theme will direct the renderer to use another set of report theme files to render your report. As a result, you have the same report content but with different look and style. You can also manage report theme such as adding a new one or remove existing one.

To manage report theme, click menu button on the upper left corner of report setting page, then select "**Switch Theme**".

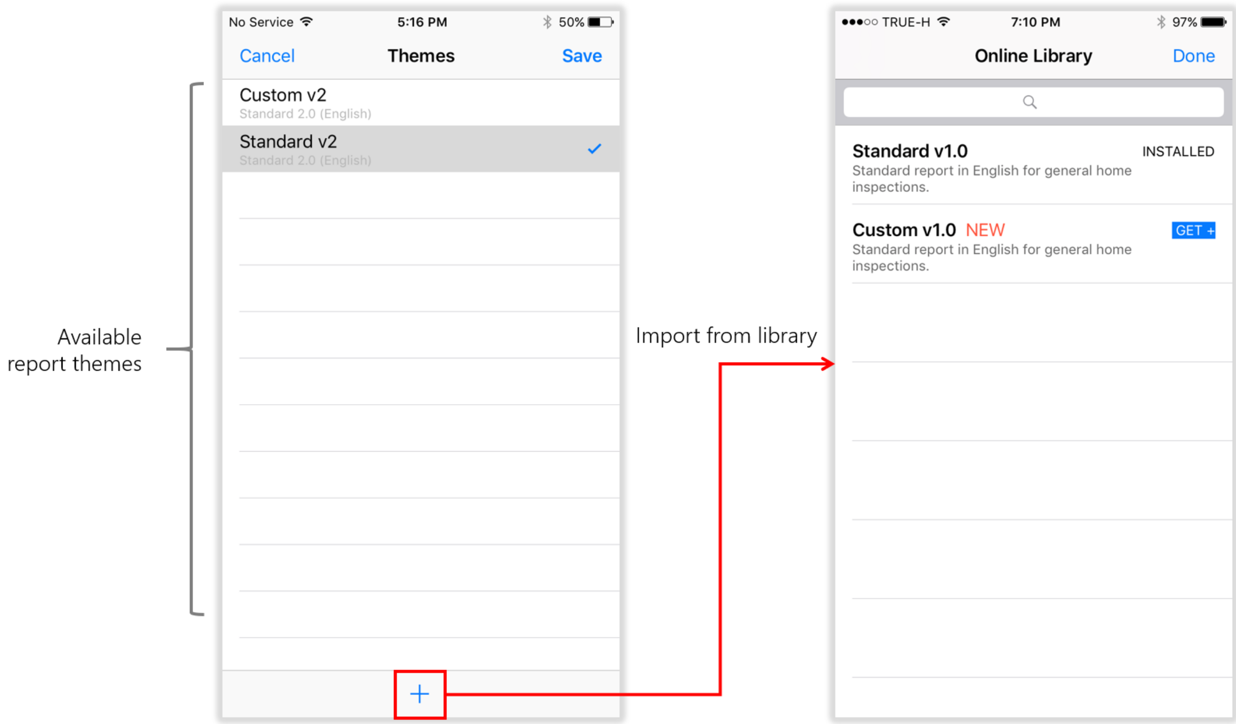


Figure 71 - Switching report theme & getting theme from online library

Switch report theme

To switch report theme, select a report theme from the list and click "**Save**".

Install report theme from library

1. Click "+" button to open online library.
2. Browse and tap the row to start download and install report theme on your device.

Delete report theme

Swipe the row to reveal actions. Select "**Delete**".

12.3 Managing report theme files

To manage report theme files, click menu button on the upper left corner of report setting page, then select "**Edit Theme**" to open a new window showing all report theme files.

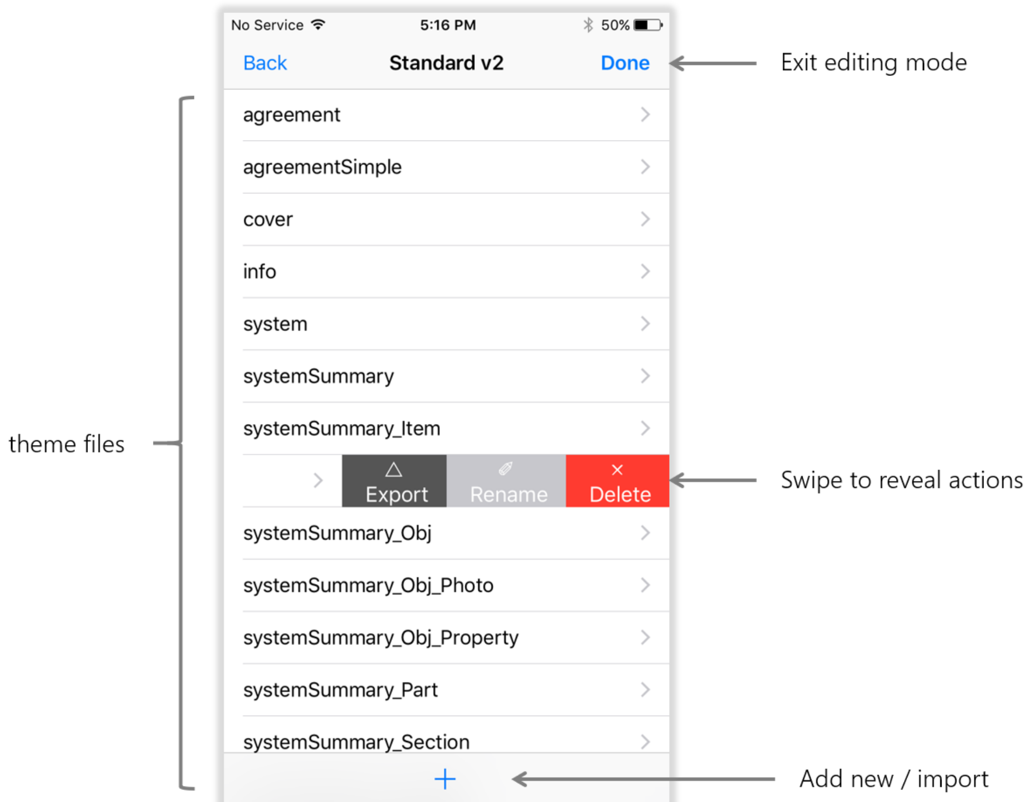


Figure 72 - Managing report UI files

Rename

1. Swipe the row to reveal actions. Select "**Edit**".
2. Type a new name. Click "**Save**".

> **Warning**: To make sure that the renderer uses the right report theme files, name has to strictly follow the format as stated in "12.1 How report is rendered" on page 85.

Delete

1. Swipe the row to reveal actions. Select "**Delete**".
2. A confirming window will pop up, click "**Delete**" to confirm.

Export

1. Swipe the row to reveal actions. Select “**Export**”.
2. Choose export options:
    a. **AirDrop** – export as a file to your mac, iPhone or iPad that support AirDrop.
    b. **Mail** – export as a file and send it via email.
    c. **iCloud Drive** – save as a file on your iCloud drive.

Import

1. Click “**Edit**” button on the upper right corner to enter editing mode.
2. Click add button (+) at the bottom of the list. Select “**Import…**”.
3. iCloud Drive window will be opened. Browse and select your saved report graphics. A selected report UI will be added to the list. Only valid UI files with .xml extension are accepted.

Create new

1. Click “**Edit**” button on the upper right corner to enter editing mode.
2. Click “+” button at the bottom of the list. Select “**Create new…**”.
3. Enter a name for new UI file. Click “**Save**”. A new blank report UI file will be placed at the bottom of the list.
4. Click “**Done**” to end the editing mode.
5. Tap the row to edit the file. See also “12.4 Modifying report theme files” on page 93.

12.4 Modifying report theme files

To modify report theme files do the following:

1. Click menu button on the upper left corner of report setting page, then select “**Edit Theme**” to a window showing all report theme files.
2. Tap any report theme file to edit. A report theme editor will be opened.
3. User report theme editor to change the code as desire. See also: “Code referencing” on page 60.
4. When done click “**Save**” to close the editor.

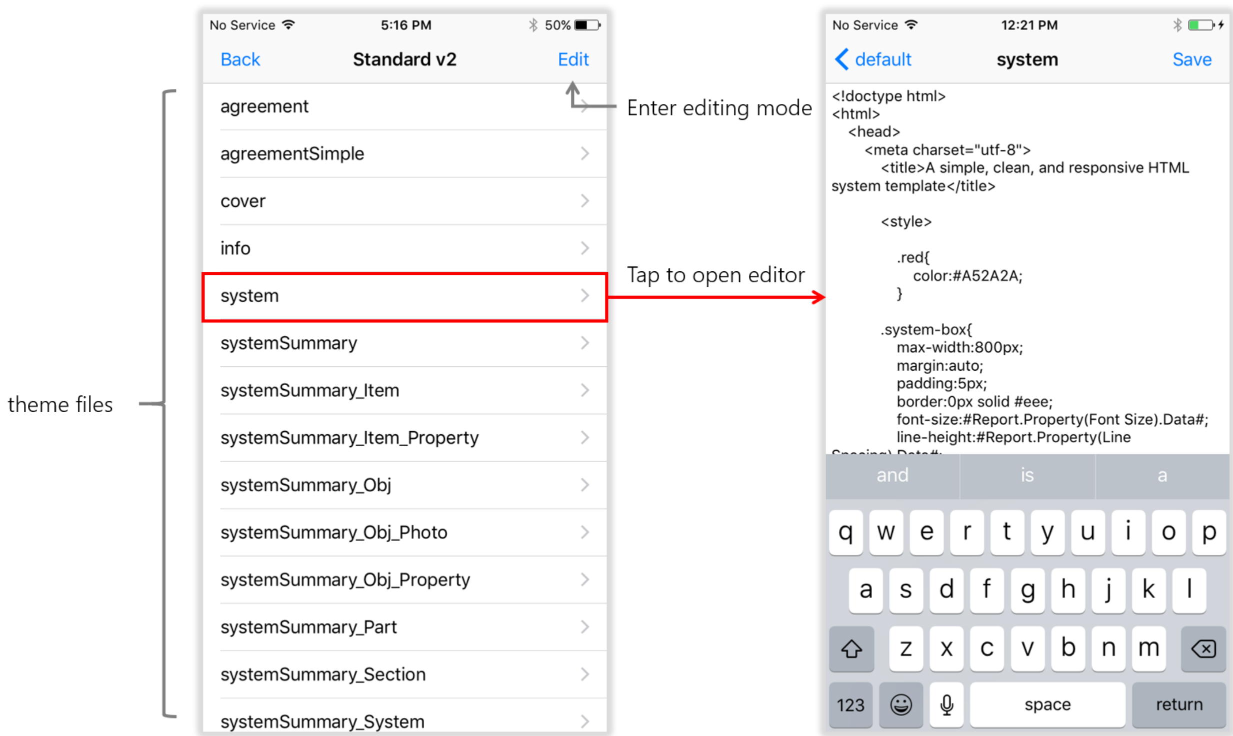


Figure 73 - Modifying report theme files

Note: Changes you have made to the report theme file will be automatically applied to the current report and any future report that use the same report theme.