

InspectNOW Office

User's Guide

v1.2



Introduction

This guide was created to provide a basic understanding of the features and functions of the InspectNOW Office software. The primary function of the InspectNOW Office software is threefold: 1) To provide the ability to import, view, and print inspections that were created with InspectNOW PC or Pocket InspectNOW; 2) To facilitate the addition of photos into inspection reports; 3) To provide a means to generate contracts and work orders, in coordination with inspection reports.

With one exception, this guide was not intended to cover features or functions of the InspectNOW for PocketPC software. The one PocketPC item that is covered in this guide is how to transfer inspection data from Pocket InspectNOW to InspectNOW Office.

The pages that follow include a table of contents, step-by-step instructions on how to use the InspectNOW Office system, and a definition of common terms for your convenience.

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InspectNOW Office Installation

Install InspectNOW Office with 4D Runtime

InspectNOW Office is automatically installed as part of the “Typical” installation of the InspectNOW Software Suite.

There are two parts to the software installation: InspectNOW Office software and 4D Runtime. InspectNOW Office is the program that you will run from your PC. 4D is the database engine that works behind the scenes to manage data for the InspectNOW Office application.

Start InspectNOW Office

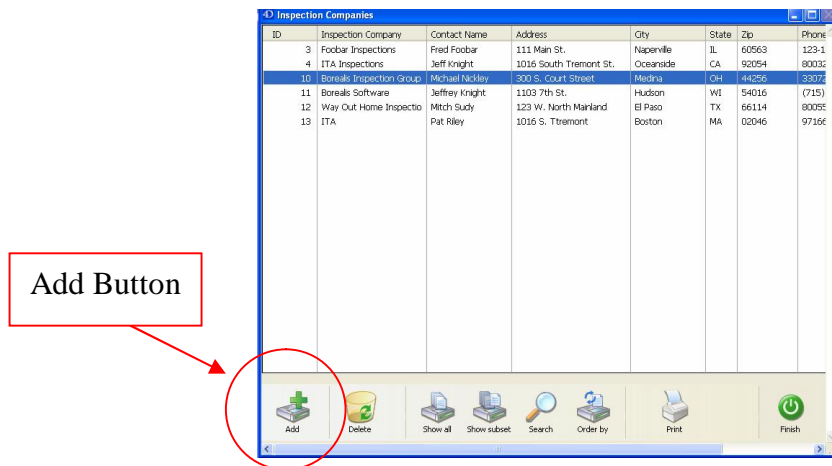
To start the InspectNOW Office application, double-click the InspectNOW Office shortcut that was placed on your desktop by the installation program. (Note – A alternate way of starting InspectNOW Office is to go to your START menu, PROGRAM FILES, and select the “InspectNOW Programs” group. From there you will also find a shortcut for InspectNOW Office.)



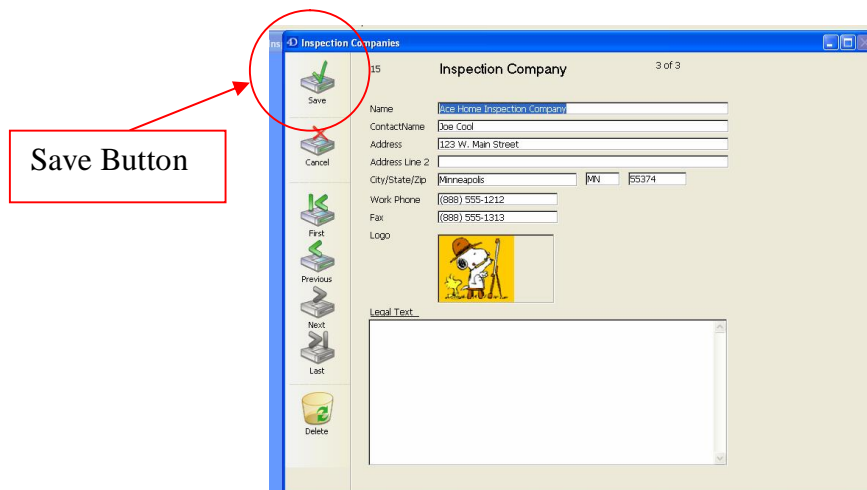
Setup an Inspection Company and Logo

Once you have installed and started the InspectNOW Office software you will want to customize the Inspection Company and Company Logo information to reflect your unique business.

From the “View” menu click “Companies” and a list will appear.



To add your company to the list, click the “ADD” button located at the lower left portion of the screen and the “Inspection Company” entry screen will appear.



Enter your company name, address, and phone number.

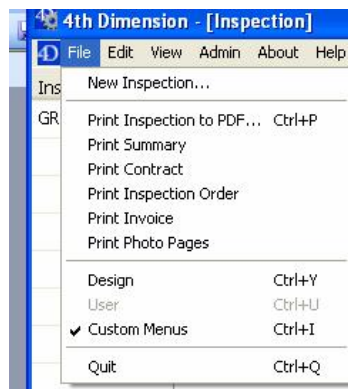
To add your company logo simply copy and paste the graphic into the logo picture field. When you are finished click the “Save” button at the top left of the screen to keep your changes.

InspectNOW Office Menu



File Menu

Use the file menu to create various types of inspection reports. Use the “Quit” item to exit the InspectNOW Office program.



Print Inspection to PDF – Create a read-only file of the inspection and its various components that can be emailed or saved to disk.*

Print Summary – Create a read-only file of the Summary section of an inspection report.*

Print Contract – Print the contract for a particular inspection.*

Print Inspection Order – Print the “Work Order” for a particular inspection.*

Print Invoice – Print a customer “Invoice” for a particular inspection.*

Print Photo Pages – Create a read-only file of the Photo Pages section of an inspection report.

Custom Menus – InspectNOW Office is always in custom menus mode.

Quit – Exit the InspectNOW office program.

** An inspection must be selected from the inspection list in order to use this item.*

Edit Menu

The edit menu contains the standard cut, copy, and paste items that are found in most Windows programs. Spell check items can also be accessed here.



Cut – Standard Windows “cut” functionality. Deletes the selected text and places it in the Windows clipboard.

Copy – Standard Windows “copy” functionality. Places a copy of the selected text in the Windows clipboard.

Paste – Standard Windows “paste” functionality. Places Windows clipboard contents (from Cut or Copy) into the selected field.

Clear – Deletes the entire contents of the field in which the cursor is placed.

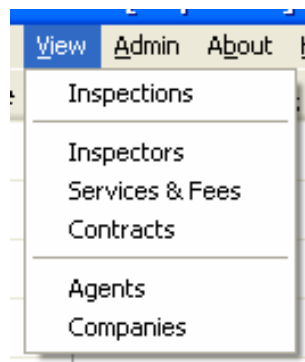
Select All – Standard Windows “paste” functionality. Places Windows clipboard contents (from Cut or Copy) into the selected field.

Spell Check Inspection ... – Runs a spelling check for all the step comments of an entire inspection. An inspection must be selected for this item to be active.

Spell Check... – This item is context sensitive and will only be available when your cursor is in a text area. Use this item when editing comments, contract language, or other text areas within InspectNOW office.

Undo – Standard Windows “undo” functionality. This will roll back to the last edit that was made. (Warning – this does not apply to some database operations such as “Delete Record”.)

Show Clipboard – Displays the contents of the Windows clipboard with the last item that has been “Cut” or “Copied”.



View Menu

Inspections – Displays a list of all inspections. Double-click on an inspection in order to view the detail and make changes.

Inspectors – Displays a list of inspectors. Double-click on an inspector in order to view the detail and make changes.

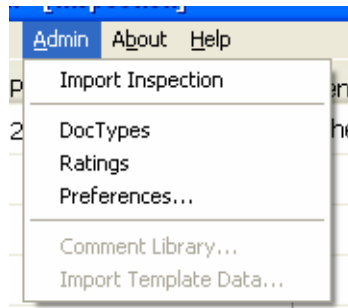
Services – Displays a list of inspection services. The services in this list are linked to the inspection order screen and made available as a pick list of services to add to the inspection order. Double-click a service in order to view the detail and make changes.

Contracts – Displays a list of contracts. Double-click a contract in order to view the detail and make changes.

Agents – Displays a list of agents. Double-click on an agent in order to view the detail and make changes. The agents in this list are linked to the inspection order screen and made available as a pick list of agents to add to the inspection order.

Companies – Displays a list of inspection companies. Double-click a company in order to view the detail and make changes. It is important for at least one of the companies listed here to match the inspection company name from the InspectNOW PC or Pocket InspectNOW application when transferring inspections.

Admin Menu



Import Inspection – Allows the user to import inspection data that was exported from InspectNOW PC or Pocket InspectNOW. (Note – Only data exported from InspectNOW PC or Pocket InspectNOW can be imported.)

DocTypes – Displays a list of document types. These document types are linked to the document types that are created in Template Maker and used with InspectNOW PC or Pocket InspectNOW. (Note – It is important to create matching document types for each new document type that you create in your custom template. By default, this list is populated with the standard Matrix document type.)

Ratings – Displays a list of step ratings. These ratings are linked to the ratings pick list in the inspection detail screen. (Note – It is important to create matching ratings for each new rating that you create in your custom template. By default, this list is populated with the ratings that match the standard Matrix template.)

Preferences – Displays a dialog where overall system preferences are set.

Import Template Data... - Imports data to update the standard ITA Matrix comment library. This item is only available / pertinent to users who have upgraded from an earlier version of InspectNOW Office.

About Menu

About InspectNOW – Displays the version number for the InspectNOW Office application.

Help Menu

The items on this menu refer only to 4D Runtime information help topics. For application specific help refer to the various sections of this User's Guide.

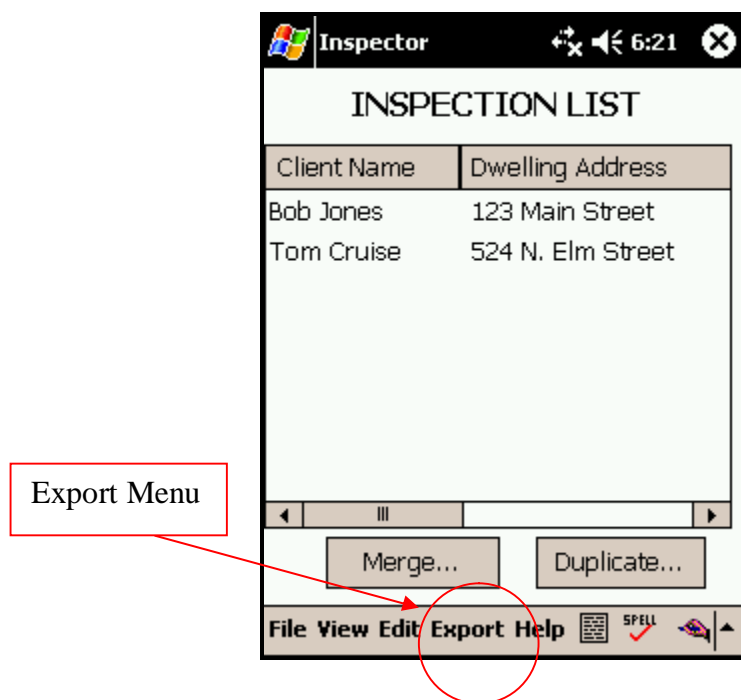
Transferring an Inspection

In order to print the ITA Matrix report, it is necessary to transfer inspection data collected with Pocket InspectNOW or InspectNOW PC, to the InspectNOW Office software for generating the ITA Matrix report. The process is slightly different depending on whether the transfer is from Pocket InspectNOW or InspectNOW PC. It is fairly simple to do.

Transferring from Pocket InspectNOW or InspectNOW PC can be done in three basic steps: 1) The inspection must be exported from the Pocket InspectNOW or InspectNOW PC software; 2) It is recommended to copy the exported inspection to the “Import/Export” folder on the PC running InspectNOW Office; 3) The inspection can be imported from the “Import/Export” folder into the InspectNOW Office application. (Note – Some users prefer to export/import the file to and from their “Desktop”. That can work just as well. The exported inspection file is only a temporary means to transfer the inspection data from one application to the other.)

Export an Inspection from InspectNOW PocketPC

Launch InspectNOW on the PocketPC.

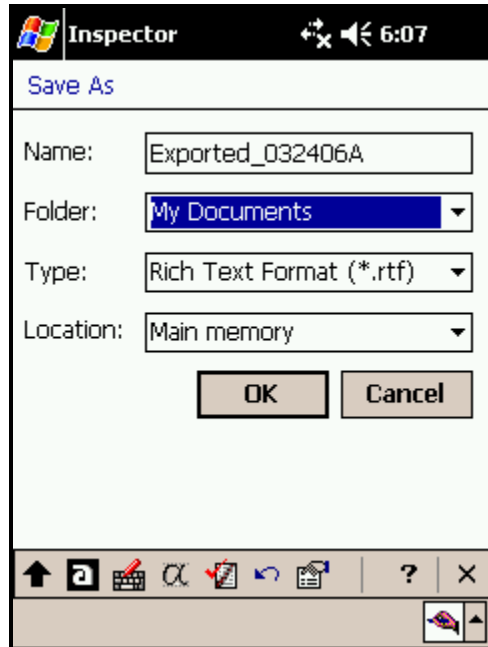


View the Inspection List. Select the inspection that you want to export.

Click the “Export” menu and select “Export inspection...” (Note – **DO NOT** choose “Export to RFT” from the FILE MENU. That item generates a narrative format report and is not made to import into InspectNOW Office.)

The following screen will appear. Edit the name for the inspection. (Some inspectors like to embed the date into the inspection name. See the following example.)

Choose the folder into which you will save the inspection. We recommend “My Documents”. This is the folder that you need to find later from the PC using ActiveSync in order to actually make the transfer to the PC.



Click the “OK” button to perform the export. Now you are ready to connect the PocketPC to the PC to make the transfer.

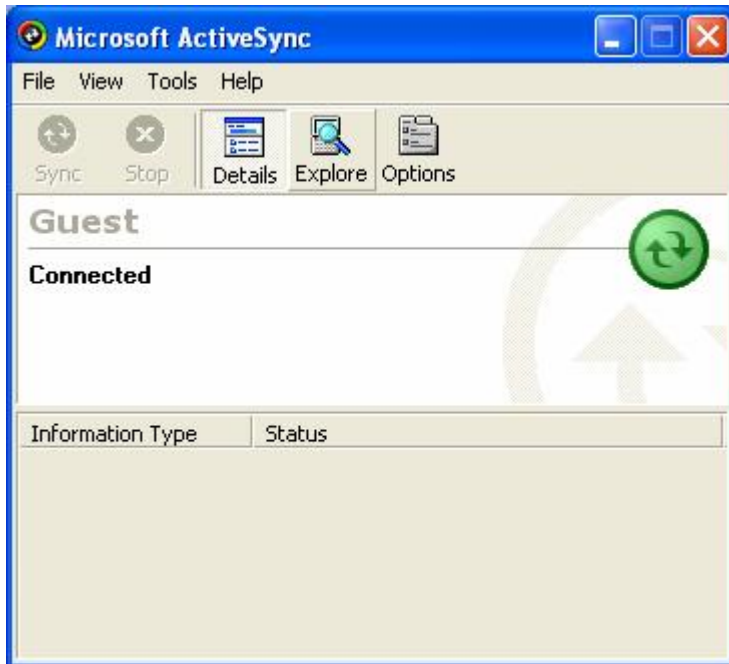
Transferring a PocketPC Inspection to the PC

Physically connect your PocketPC to the PC to which you want to transfer the inspection. Most inspectors use a PocketPC USB docking station connected to one of the PC's USB ports. This should automatically launch Windows ActiveSync on your PC. (Note: if you have not already installed Windows ActiveSync on your PC, please do so at this time. Refer to the documentation that came with your PocketPC.)

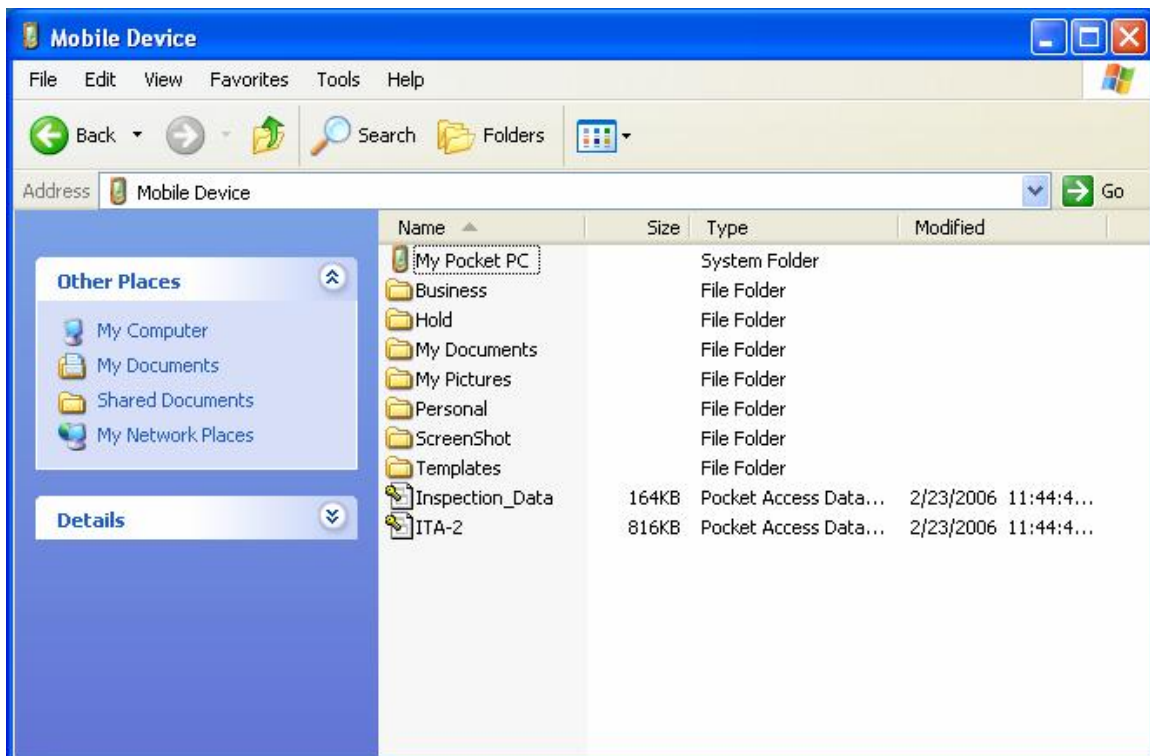
Active Sync will automatically display the following dialog. (If you have already established a partnership with your PC, this dialog will not appear.)



To connect without establishing a permanent partnership, select the "Guest partnership" and click next. If you have established a partnership, the next dialog will automatically appear.

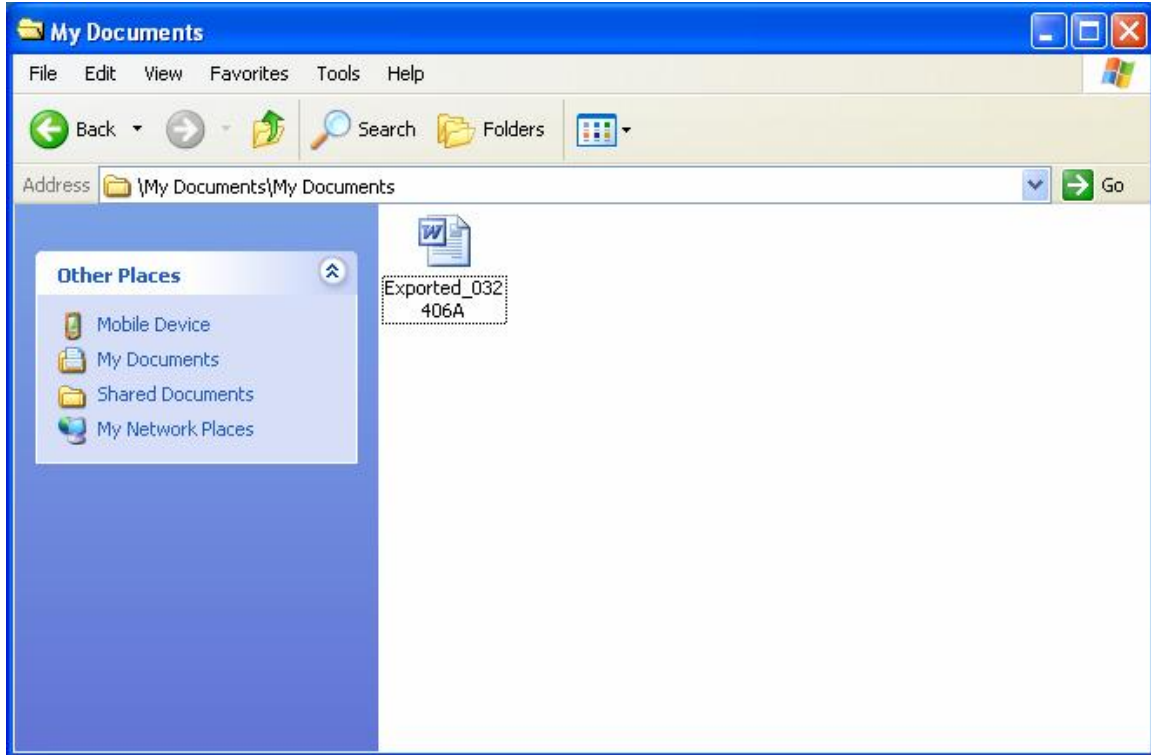


Once the PocketPC has completed its sync cycle, click the “Explore” icon to view files on your PocketPC using ActiveSync.



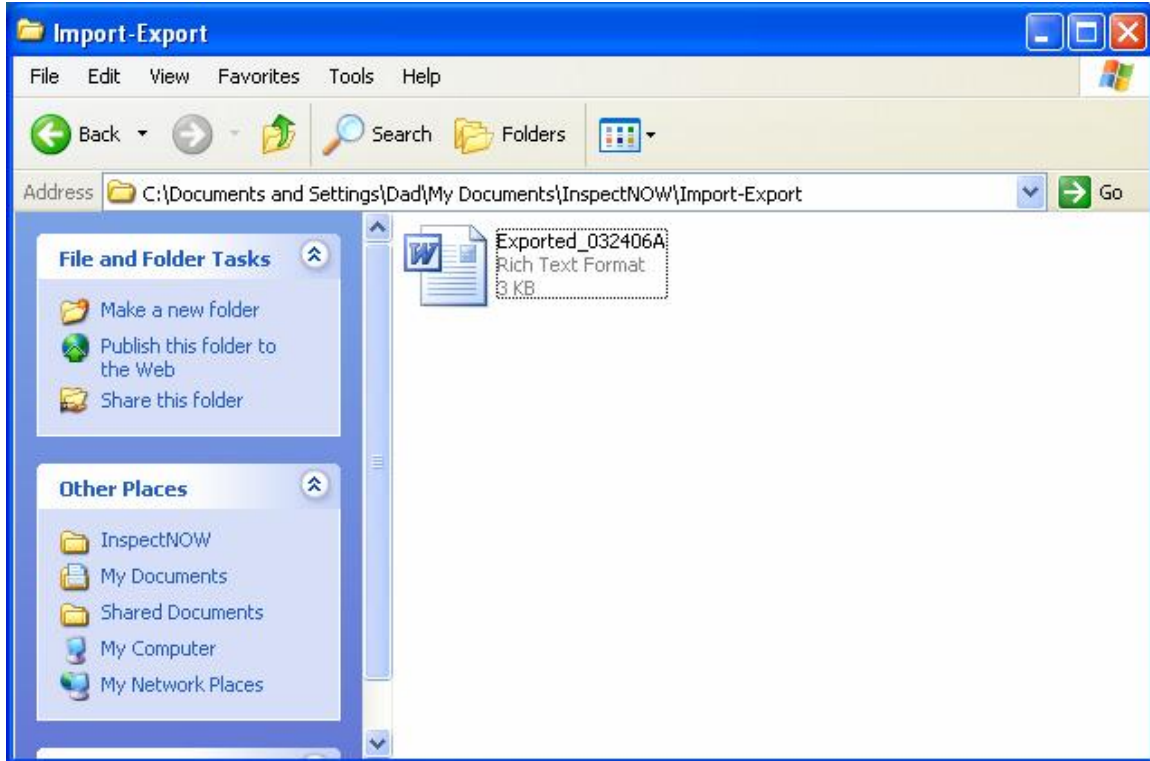
Navigate to the folder where you saved the exported inspection. In the example, the inspection was saved to “My Documents”. Double-click the folder where the inspection was saved.

View of the PocketPC from ActiveSync Explorer



Right-click the inspection to be transferred. Click copy from the pop-up menu.

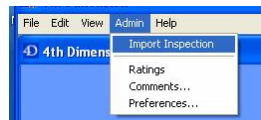
View of Windows Explorer on the PC



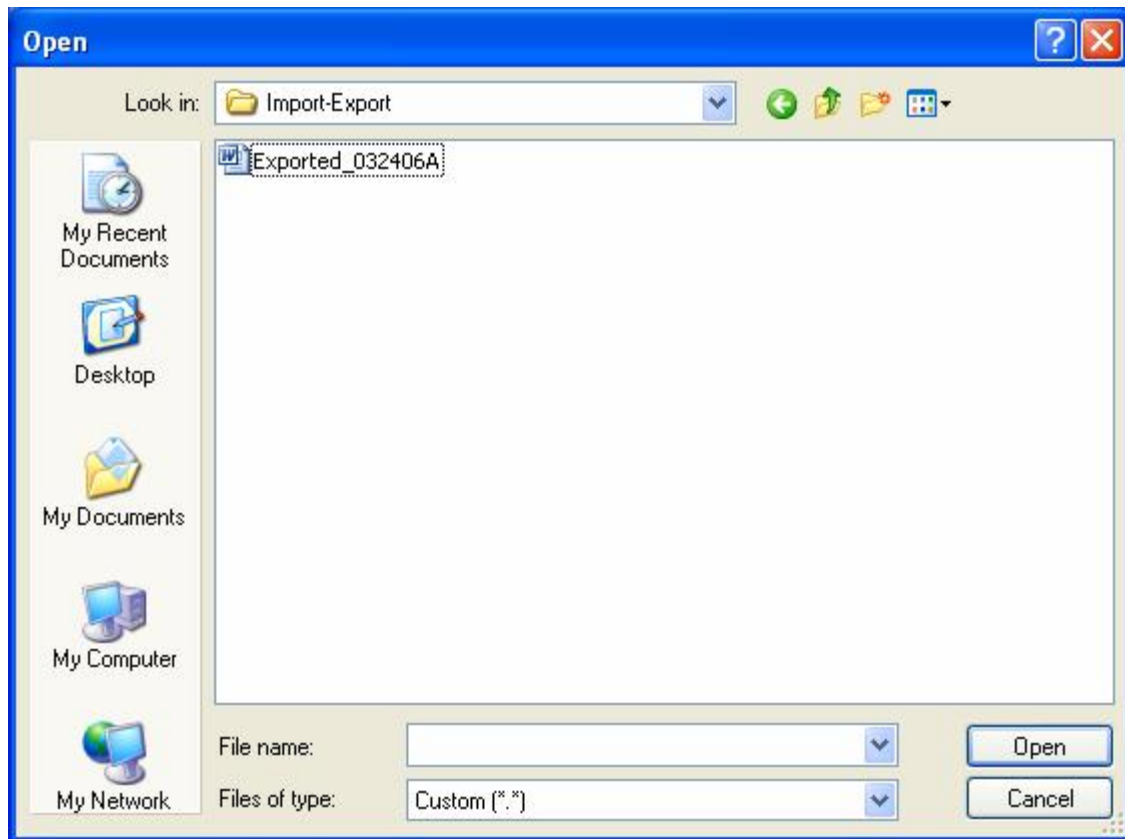
Navigate to the folder into which you want to save the inspection on the PC. We recommend the following: Click “Start” and open “My Documents”. Double-click the “InspectNOW” folder. Double-click the “Import-Export” folder. From the “Edit” menu, click “Paste”. The file will be copied from the PocketPC to your PC.

There is one more step to bring it into the InspectNOW Office.

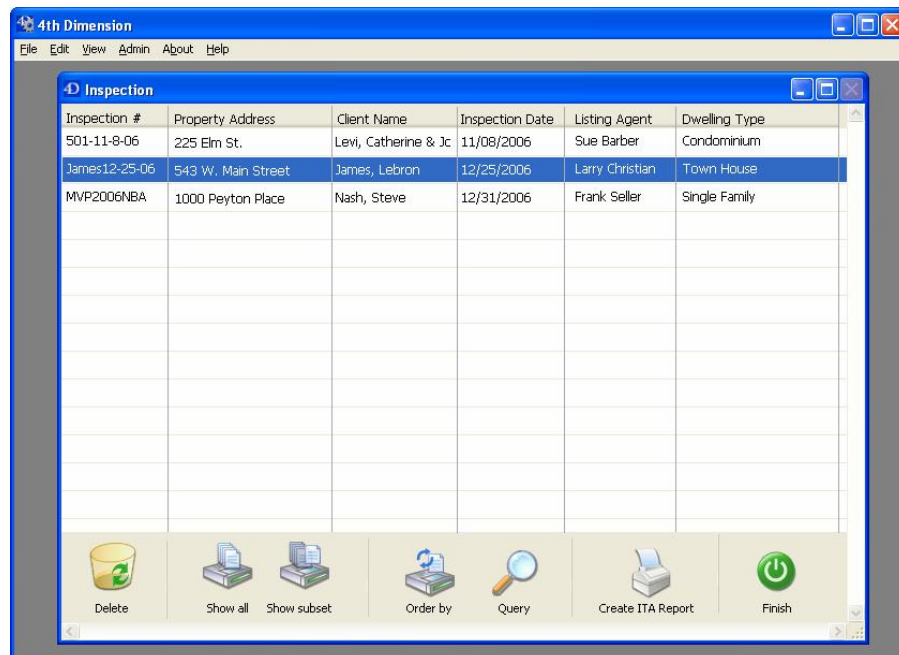
Import an inspection into InspectNOW Office on the PC



In the InspectNOW Office program, go to the “Admin” menu and select “Import Inspection.” The following dialog will appear:



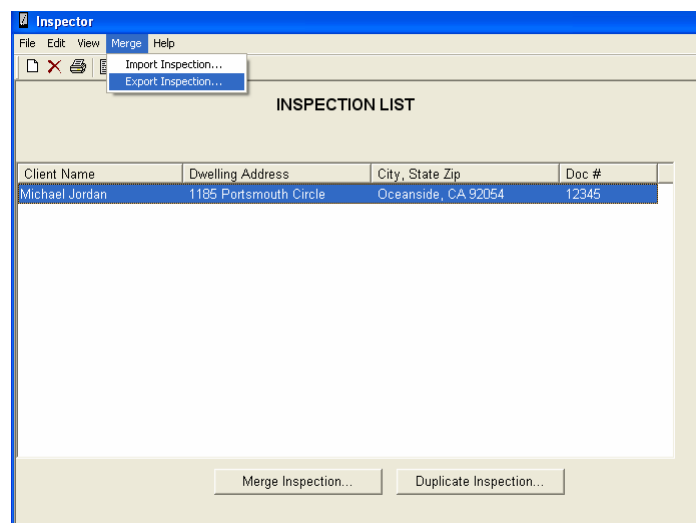
Use this dialog to navigate to the folder where you pasted the inspection on your PC. (In our example it was in the following location c:\My Documents\InspectNOW\Import-Export\). Click on the inspection and click the “Open” button. To view your inspection, from the “View” menu click “Inspections”.



Export an inspection from InspectNOW PC

This process is very similar to exporting an inspection from the Pocket InspectNOW software. Both require exporting the inspection, copying the exported file to the correct directory on the InspectNOW Office computer, and importing the inspection into the InspectNOW Office application.

Launch InspectNOW on the PC. View the Inspection List. Select the inspection that you want to export.



Click the “Export” menu and select “Export inspection...”

Choose the folder into which you will save the inspection. If your InspectNOW PC software is on the same PC as the InspectNOW Office software you will want to save the exported inspection directly into the “Import/Export folder” used to import inspections.

If you are transferring the inspection from a laptop or tablet PC that is not running the InspectNOW Office software you will need to copy the exported inspection from that laptop or tablet PC to the InspectNOW Office PC for the import.

Follow the instructions in the previous section to **“Import an inspection to InspectNOW Office on the PC”**.

Digital Photos

Often inspectors wish to incorporate digital photographs into their inspection reports. InspectNOW provides that capability. There are two ways to get digital photos into the matrix-style inspection report: 1) The “Merge Photo” method references photos through the step comments and merges the actual picture files using a button on the “Photo” Tab for an inspection in InspectNOW Office. 2) The “Ad-Hoc Photo” method allows for photos to be added individually through the “Photo” Tab of an inspection in InspectNOW Office. These methods can be used separately or in concert with one another.

The “Merge Photo” method is a five-step process:

- 1) Pictures are taken with the digital camera.
- 2) The picture numbers are noted in the appropriate step comments.
- 3) The inspection is transferred to InspectNOW Office.
- 4) The pictures are copied into the corresponding InspectionID folder on the PC.
- 5) The pictures are loaded into the InspectNOW Office inspection.

To include the photos with an inspection report, make sure to check the “Photo Page” checkbox in the “Create PDF” print dialog.

“Merge Photo” Method

Digital pictures are cross-referenced to a specific inspection step comment by the picture number. The order in which the pictures are taken must correspond with the picture number that is cross referenced in the step comment of the Pocket InspectNOW or InspectNOW PC software.

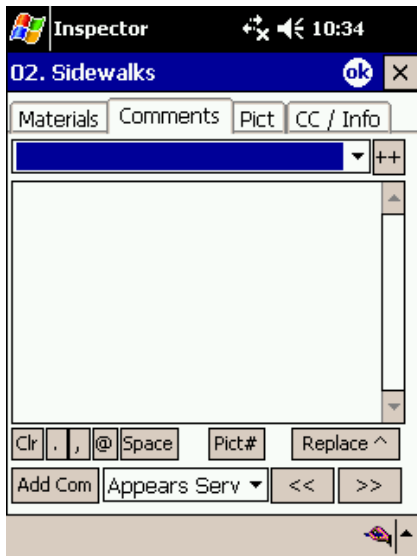
A typical scenario for cross referencing a picture into an inspection is as follows:

Launch Pocket InspectNOW (or InspectNOW PC) and open an inspection.

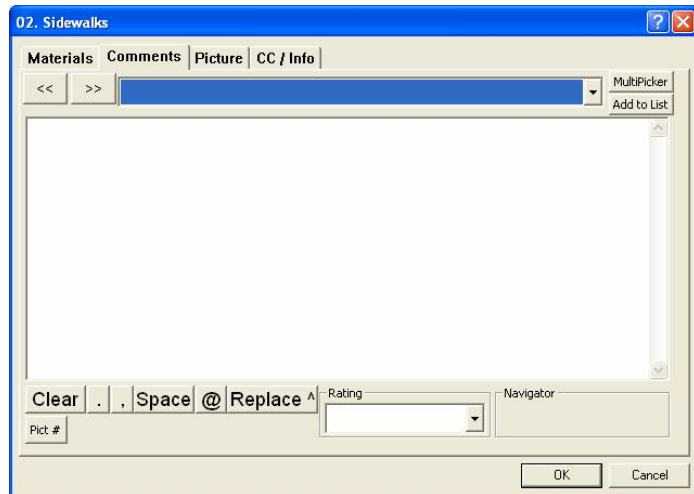
For this example, view the “Category List” and tap on “GROUNDS” to view the step list for GROUNDS. Double-tap on “Sidewalks”, then tap the “Comments” tab to view the “Sidewalks” step comment screen.

A defect in the front sidewalk of the property is observed. Take a picture of the defect with the digital camera.

Cross-referencing a picture to a step comment

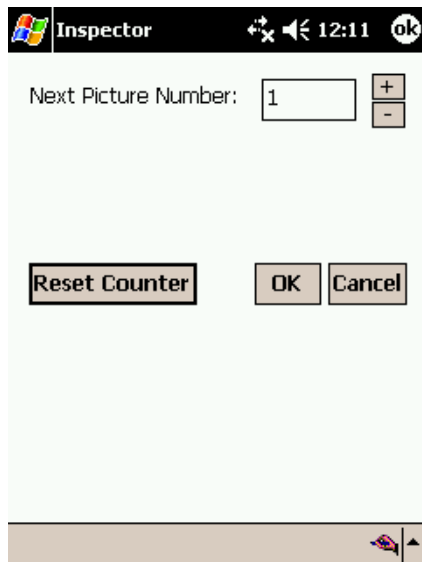


Pocket PC Step Comment Tab

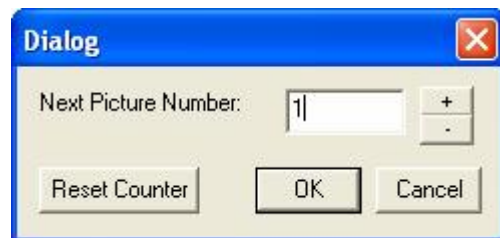


InspectNOW PC Step Comment Tab

Now on the PocketPC, from the step comment screen for “Sidewalks”, tap the “Pict #” button near the bottom of the screen. A dialog will appear allowing you to set the picture number.

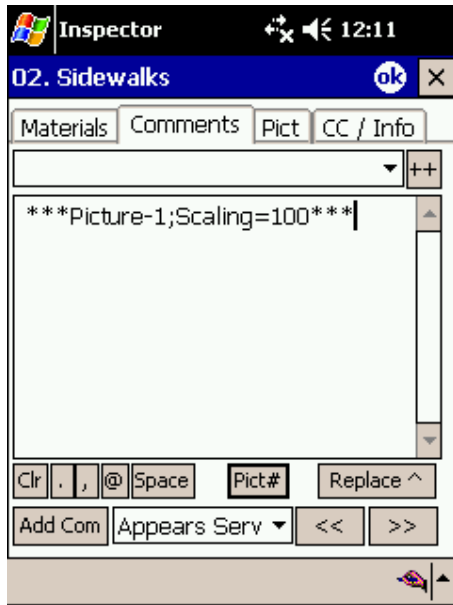


Pocket PC Picture # Dialog

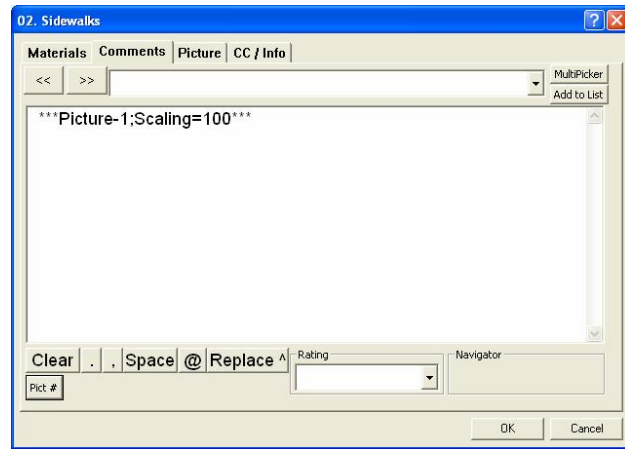


InspectNOW PC Picture # Dialog

By default, the first picture number in an inspection will be picture number “1”. Use the “Reset Counter” to reset the number to “1” if necessary. (Note; as more pictures are referenced in subsequent step comments the picture number will automatically be incremented.) Tap the “OK” button to save the picture number.



Pocket PC Step Comment Tab



InspectNOW PC Step Comment Tab

You will see a reference to that picture number in the comment text area. (Note: this reference text **WILL NOT BE PRINTED** as part of the other text comments for this step. It is only used by the InspectNOW Office software to merge the cross-referenced picture into the report.)

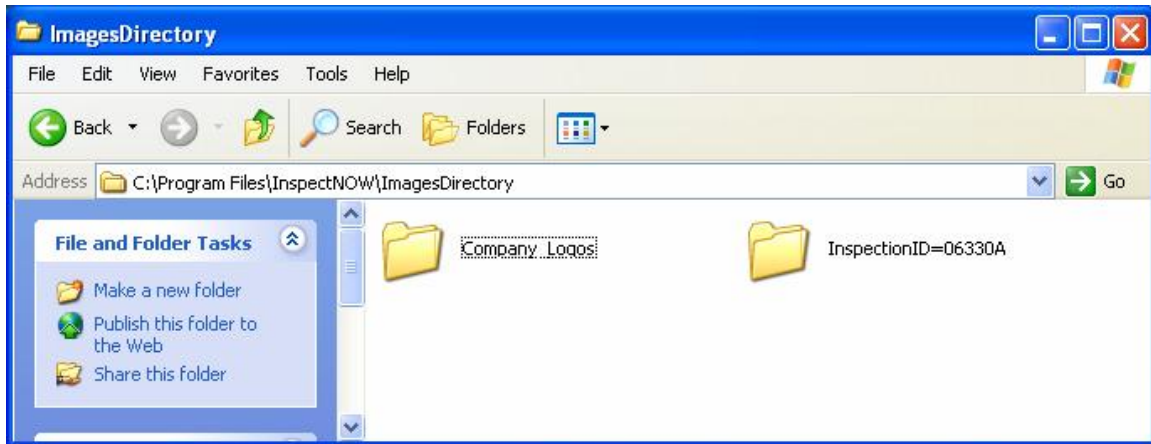
With each picture you take for an inspection, the corresponding picture number must be noted in each step comment as described above.

Transferring photos from the camera to InspectNOW Office

Once the inspection is complete it must be transferred to the InspectNOW Office software. (See “Transferring and Inspection” in this user’s guide.) During the transfer, an “Inspection ID=*inspectionNumber*” folder was created for the storage of digital photos for the corresponding inspection.

The folder will be in the following location on your PC:

“C:\Program Files\InspectNOW\ImagesDirectory\InspectionID= *inspectionNumber*”
where “*inspectionNumber*” will be equal to the inspection number that you assigned the inspection in the Inspection Setup screen.

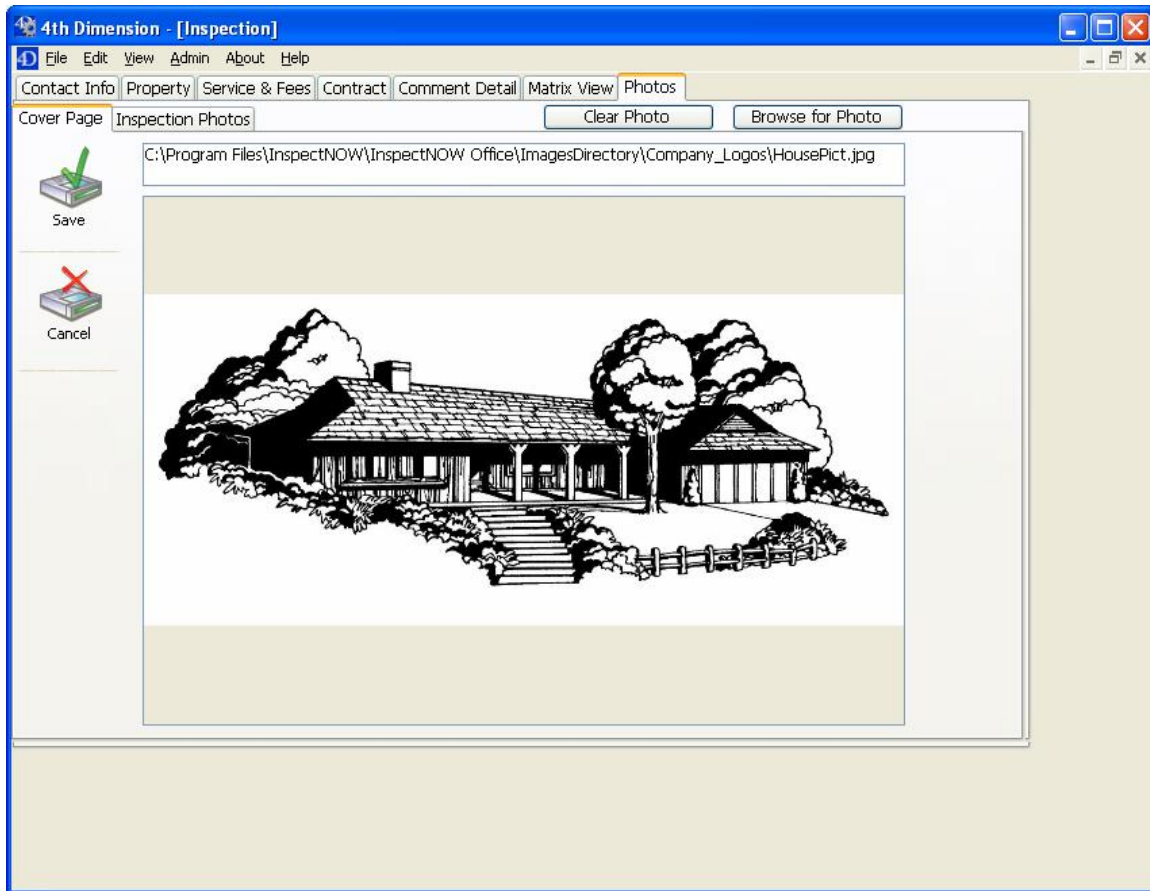


Connect the digital camera to your PC running InspectNOW Office and copy the pictures into the corresponding “InspectionID=*inspectionNum*” folder. In the above example the inspection number is “06330A”.

“Ad-Hoc Photo” Method

A new feature has been added to this version of InspectNOW Office that allows you to add, change, or delete photos directly on your PC for any given inspection.

From the “View” menu select “Inspections” to view a list of inspections that have been created and/or imported into InspectNOW Office. Double-click on the inspection to view the inspection detail. Click on the “Photos” tab to manage photos for the inspection. The cover page photo screen will appear as follows:

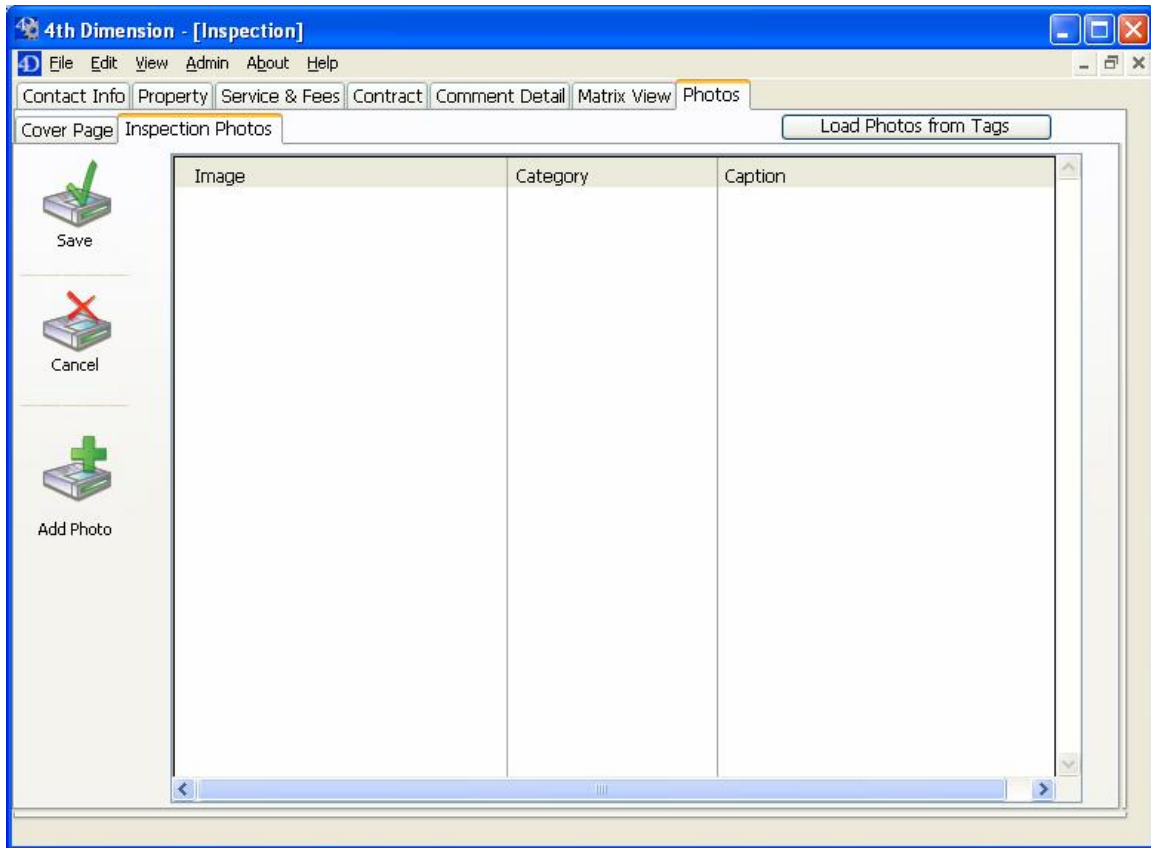


Add a Photo for the Cover Page

To identify a photo to be included on cover page of the report, click the “Browse for Photo” button and use the open file dialog to find and select a photo to be placed on the cover of the inspection. (Note – Most inspectors use a picture of the house or property being inspected.)

Merge Photos Tagged in Step Comments

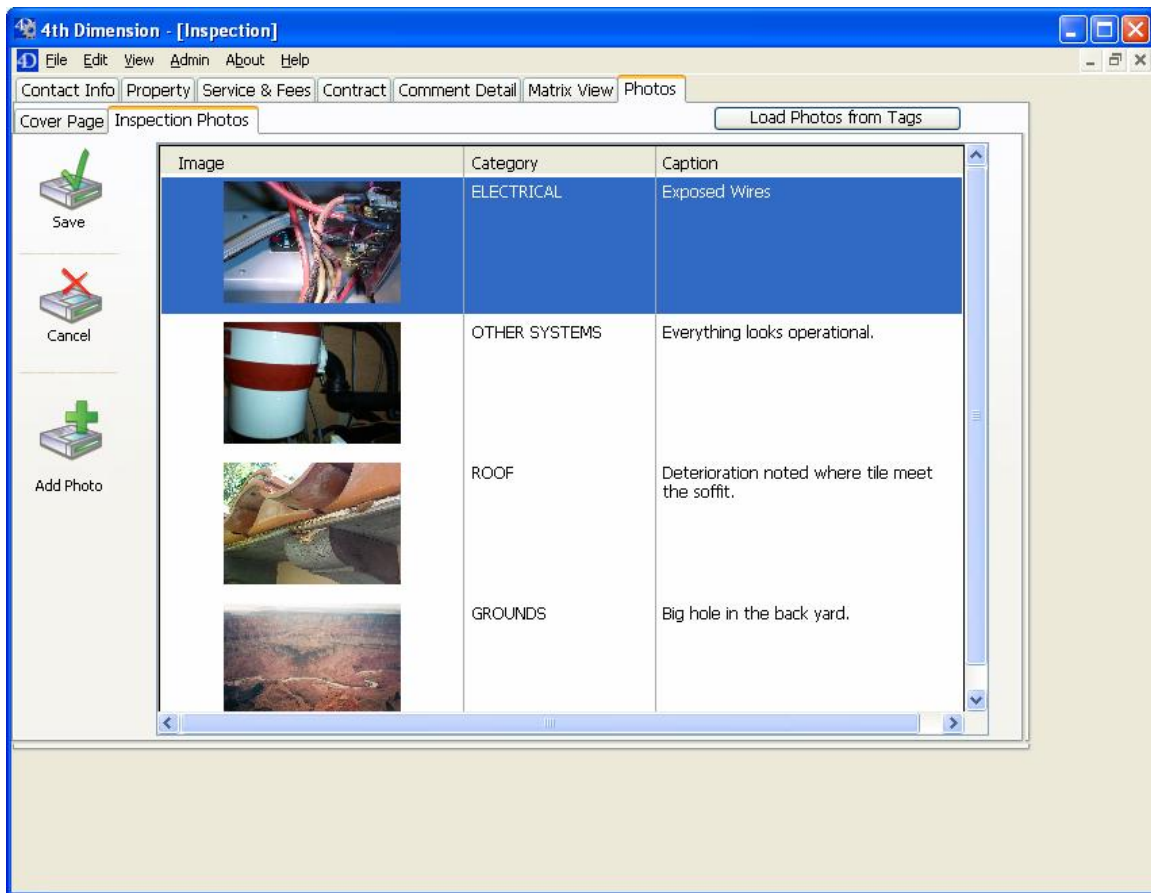
On the “Photo” tab for an inspection you will find two “sub-tabs”: the “Cover Page” sub-tab and the “Inspection Photos” sub-tab. Click the “Inspection Photos” sub-tab to view the inspection photo list.



Photos can be merged into the inspection by clicking the “Load Photos from Tags” button located in the upper right-hand corner of the screen. This merges photos ONLY if the following steps have already been taken:

1. If picture references were placed into step comments using the “Pict #” button in InspectNOW PC or Pocket InspectNOW prior to transferring the inspection data to InspectNOW Office.
2. The photos have already been copied into the “InspectionID=*reportNum*” folder.

The photo list will be populated with the merged photos. An example is shown in below.



Edit Photo Detail

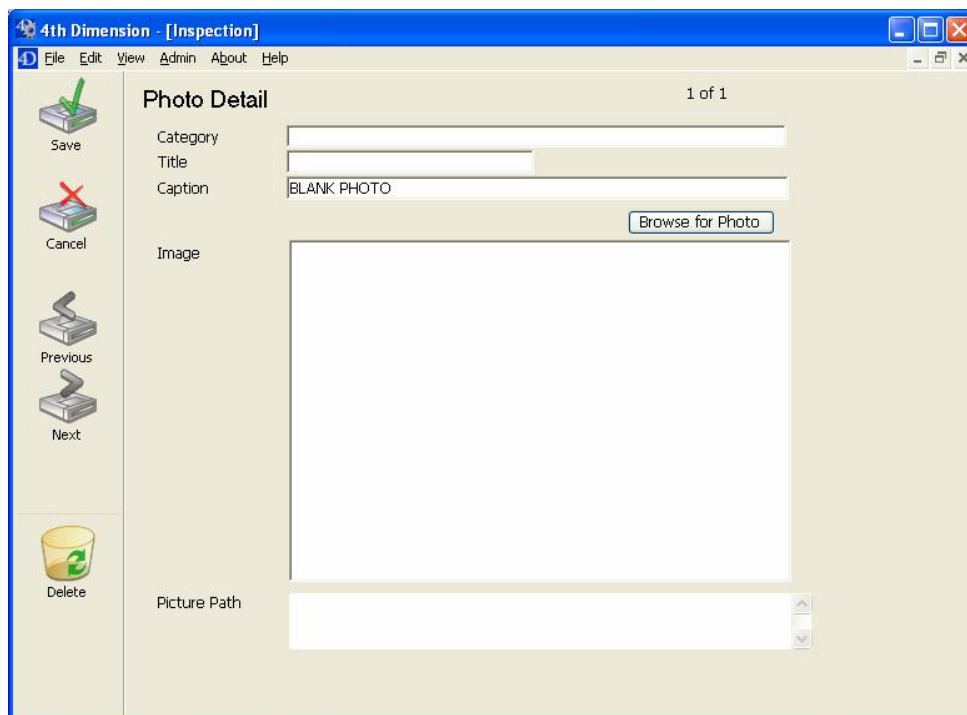
Double-click a photo record to edit the photo detail. The photo detail screen will appear.



Simply edit the “Category”, “Title”, and “Caption” accordingly. Use the “Browse for Photo” to select a different picture for this picture record.

Add a New Inspection Photo

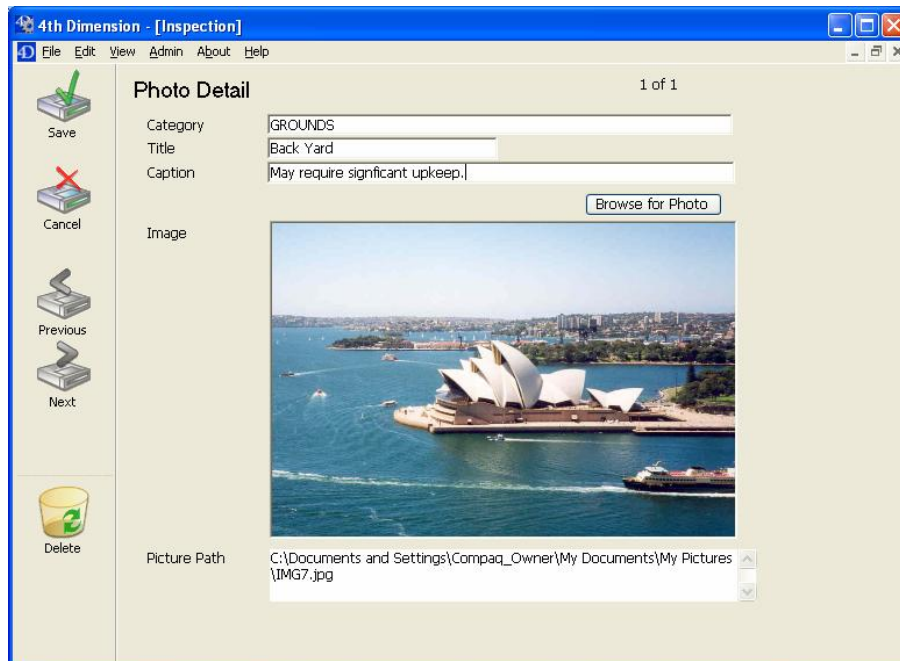
From the “Inspection Photos” list screen, click the “Add” button. A new photo record will be created and displayed in the photo detail screen.



Click the “Browse for Photo” button to bring up a dialog that allows the selection of photo stored on your PC.



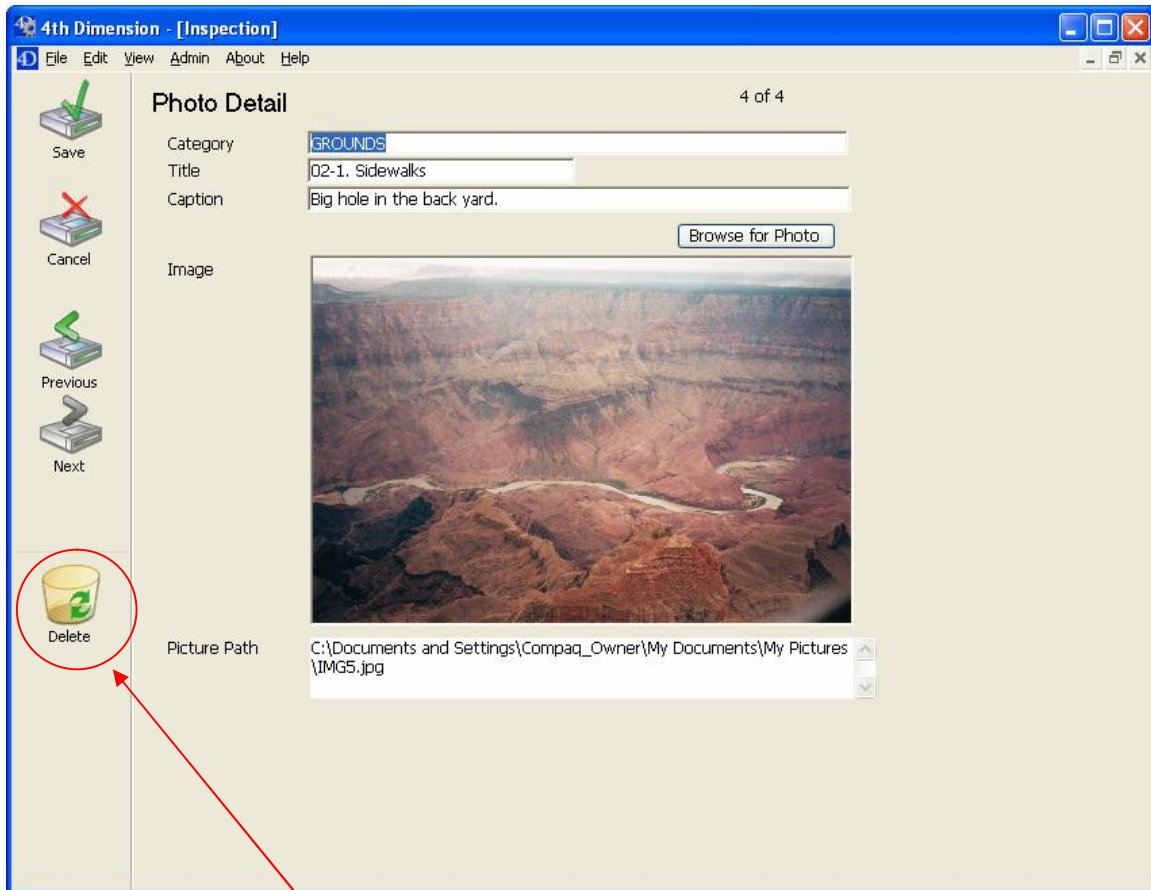
Navigate to the folder where your pictures are stored and “Double-Click” on the photo to include it with the inspection.



Edit the “Category”, “Title”, and “Caption” fields as desired. Click “Save” to save the changes to the photo record.

Delete an Inspection Photo

To delete an existing inspection photo, view it in the photo detail screen and click the “Delete” icon.



Add Button

Including Photos in the PDF report

In order to include photos in the ITA Matrix report, from the “File” menu click “Print Inspection to PDF...” and make sure that the “Photo Pages” item is checked in the list.

4th Dimension - [Inspection]

File Edit View Admin About Help

Print Inspection of PDF Report #: FP-112106

For Inspection : 315 Oak Street
Omaha, NB 60014

Client : Twain, Shania

Categories and Pages to Include

<input checked="" type="checkbox"/>	GENERAL INFO
<input checked="" type="checkbox"/>	GROUNDS
<input checked="" type="checkbox"/>	EXTERIOR
<input checked="" type="checkbox"/>	FOUNDATION
<input checked="" type="checkbox"/>	ROOF
<input checked="" type="checkbox"/>	PLUMBING
<input checked="" type="checkbox"/>	HEATING
<input checked="" type="checkbox"/>	HEATING #2
<input checked="" type="checkbox"/>	HEAT2/COOL
<input checked="" type="checkbox"/>	ELECTRICAL
<input checked="" type="checkbox"/>	INTERIOR
<input checked="" type="checkbox"/>	INTERIOR-2
<input checked="" type="checkbox"/>	GARAGE
<input checked="" type="checkbox"/>	KITCHEN
<input checked="" type="checkbox"/>	BATHROOMS
<input type="checkbox"/>	POOL/SPA & EQUIPMENT
<input type="checkbox"/>	GENERAL NOTES
<input checked="" type="checkbox"/>	PHOTO PAGES
<input type="checkbox"/>	SUMMARY PAGES

All Categories ON
All Categories OFF

☐ Print ONLY selected Materials
☐ 3-Hole Punch Margin
☒ Captions ON

Cancel Create PDF

Photo Pages

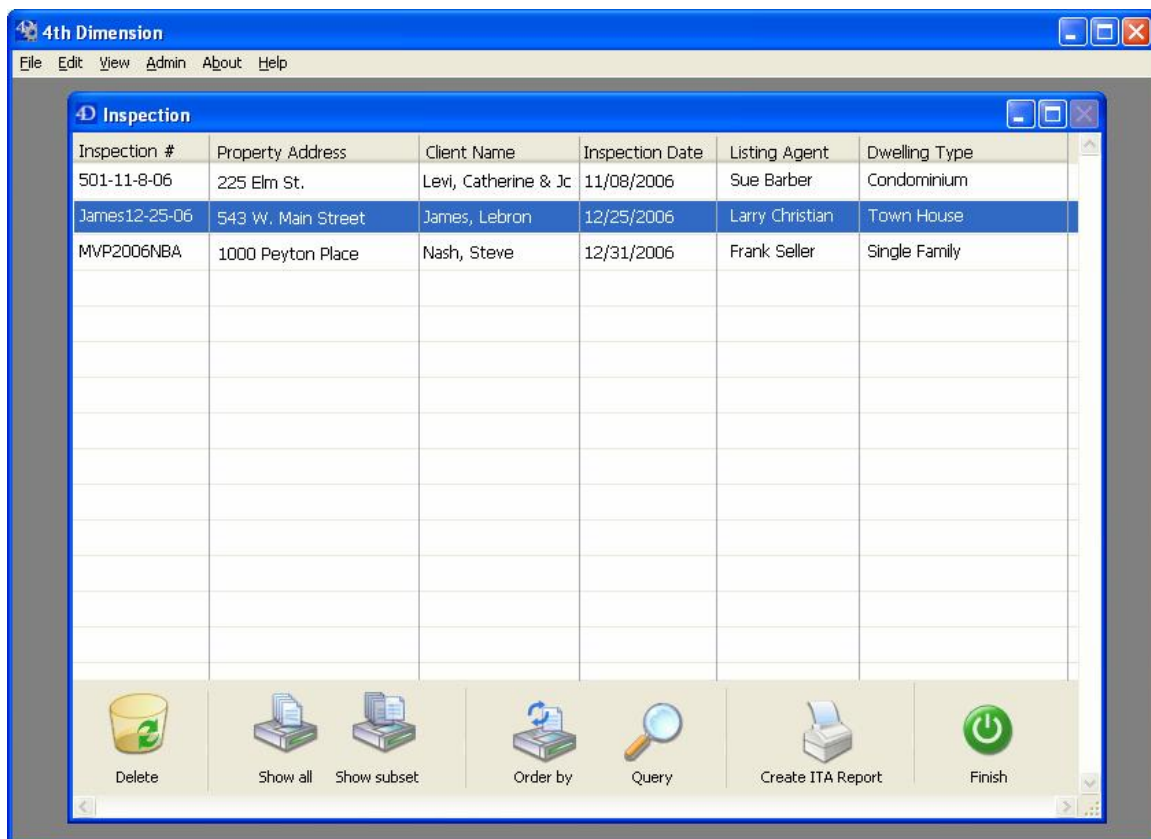
Creating the PDF report

Create a PDF of an inspection report

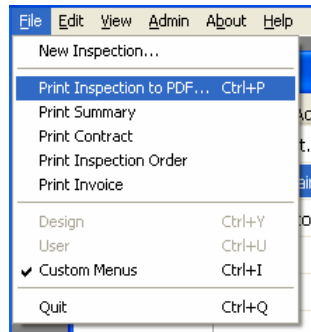
In order to create a PDF you must first select an inspection from the list. From the “View” menu select “Inspections”.



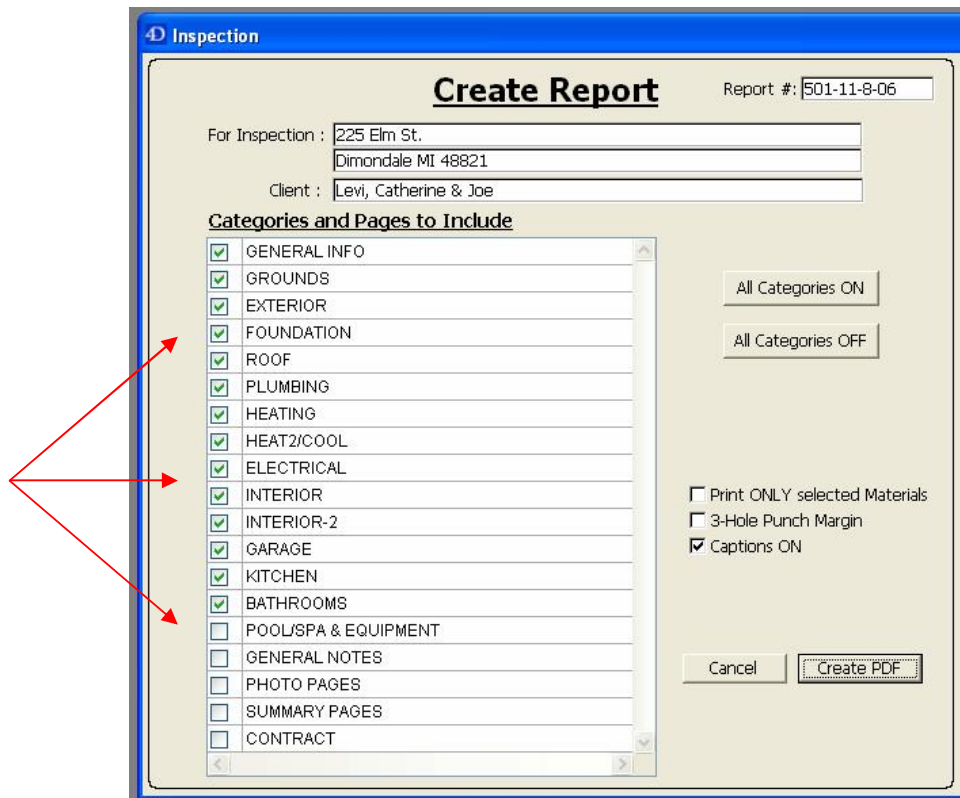
An inspection list will be displayed.



“Single-click” on an inspection in order to select it. From the “File Menu” click “Print Inspection to PDF...” or just click the “Create ITA Report” printer icon at the bottom of the screen.



The following dialog will appear. Check the items to include in the PDF report:

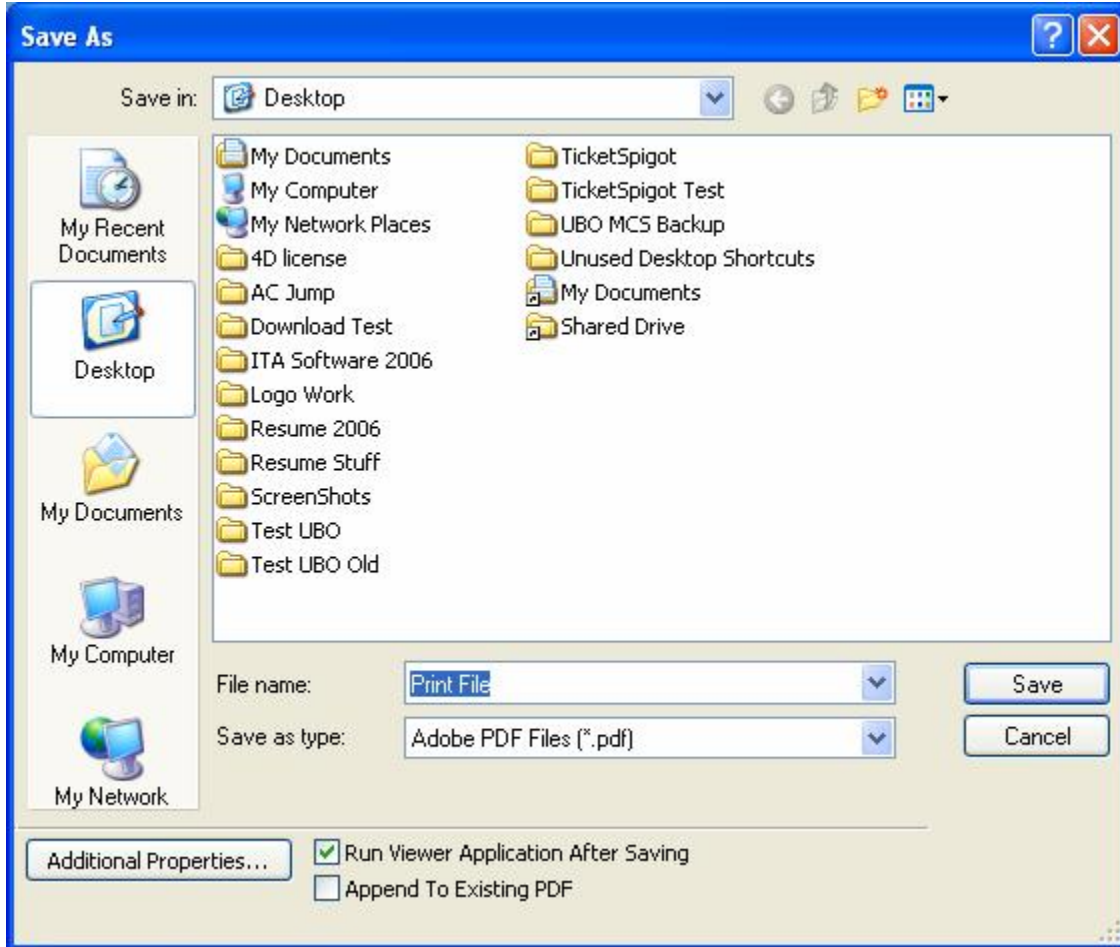


Check the categories and pages to be included in the PDF document.

(Note; by default, all material checkbox items will be printed in the ITA Matrix report format. If you only want the items that are checked to be included in the report, check the “Print ONLY selected Materials” checkbox in the lower left of this dialog.)

Click the “Create PDF” button to actually generate the PDF report.

A Save Dialog will appear.



Edit the File name; select the desired location and click “Save”.

Printing options when creating a PDF report

Once you have saved a PDF report you can view it by double-clicking it. This will automatically launch the Acrobat Reader which is used to view PDF documents. To print the document, go to the “File” menu and pick print. (Note - When the printer dialog appears, be sure to pick the printer you want use otherwise you may create a PDF of the PDF.)

Entering an Inspection Order

To enter inspection order information, go to the “View” menu and select “Inspections” to view the inspection list.

4th Dimension						
File Edit View Admin Help						
Inspection #	Property Address	Client Name	Inspection Date	Listing Agent	Dwelling Type	Special Instructions
774533	123 Chesterfield Way	Jordan, Michael	05/09/2005	J Jones	Fourplex	These are the spec
28754	275 Sun Drive	James, Lebron	01/08/2006	Fred Buyer	Single Family	Beware of dog. Th
898989	1103 7th Street	Magnum, Thomas	01/20/2006	Fred Buyer	Condominium	The unit recently h
12306 test	New Address	Sudy, Mitch	01/23/2006	Shania Twain	Apartment	The realtor is a real
22006a	123 Oak Drive	Knight, Jeff	02/20/2006	Century 21	Commercial	This job must be di

Double-click the desired inspection to view details about the inspection or to create a new inspection order go to the “File” menu and pick “New Inspection”. The new or existing inspection detail form will be displayed with the “Contact Info” tab highlighted.

Inspection Detail Screen

The screenshot shows the 'Inspection' window with the 'Contact Info' tab selected. The window has a sidebar with icons for Save, Cancel, Previous, Next, Print Work Order, and Delete. The main area is divided into sections: Client, Agent Information, and Inspection Information. The Client section includes fields for Last Name (Nash), First Name (Steve), Address (6600 Park Avenue), City/State/Zip (Seattle, WA 90019), Work/Day Phone ((666) 525-1313), Home/Eve Phone ((666) 552-4545), and E-mail (MVP@NBA.com). The Agent Information section has buttons for Buyer's Agent... and Listing Agent..., and fields for Agent Name (Jack Mason), Company (Mason Century 21), and Cell # ((815) 655-1515). The Inspection Information section includes a dropdown for Inspection Type (Matrix Deluxe), Company ID (19), Date (12/31/06), Time (9:00 AM), Inspector (Michael Nickley), Ordered By (Seller), and Referred By (Seller's Agent). There is also a 'Prior Confirmation' section with radio buttons for Buyer's Agent, Seller's Agent, and Client (selected).

Client	
Last Name	Nash
First Name	Steve
Address	6600 Park Avenue
City/State/Zip	Seattle, WA 90019
Work/Day Phone	((666) 525-1313
Home/Eve Phone	((666) 552-4545
E-mail	MVP@NBA.com

Agent Information	
Buyer's Agent... Listing Agent...	
Agent Name	Jack Mason
Company	Mason Century 21
Cell #	(815) 655-1515

Inspection Information	
Inspection Type	Matrix Deluxe
Company ID	19
Date	12/31/06
Time	9:00 AM
Inspector	Michael Nickley
Ordered By	Seller
Referred By	Seller's Agent

Prior Confirmation

☐ Buyer's Agent

☐ Seller's Agent

☒ Client

The inspection detail form is divided into 7 sections represented by the TABS across the top of the screen: Contact Info, Property, Service & Fees, Contract, Comment Detail, Matrix View, and Photos.

Contact Information

By default, when an inspection is double-clicked from the inspection list, it opens to the Contact Info tab of the inspection detail form. This tab is divided into three sections: Client, Agent, and Property information. (Note: only enter numeric characters into the phone number fields. The number will automatically be formatted.)

The agent name fields are linked to the Agent table and will automatically pull information entries made into that table. Typing in the first letter or two into this field and pressing the “Tab” key on your keyboard will cause a lookup from the agent table. To manage the agent list, you can do so from the “View” menu, “Agents”. (See the section in this guide on Managing Agents.)

In order to view or edit the details for a particular agent, click the “Buyer’s Agent”, or “Listing Agent” button. The Agent Entry Screen will appear.

The screenshot shows a software window titled "Buyer's Agent" with a sub-header "Agent Entry Screen". The form contains the following fields and values:

Field	Value
Agent	Larry Christian
Company	Saddle Realty
Address	765 Saddlecreek Rd.
City/State/Zip	Houston TX 54113
Cell# Phone	(788) 986-6543
Work Phone	(788) 986-6543
Resident Phone	
Fax	(344) 674-6522
E-mail	Larry@Saddle.com
Notes	

At the bottom right of the form are two buttons: "Cancel" and "OK".

Click “OK” save changes and return to the inspection detail form.

Click the “Property Info” tab view or edit the property information.

The bottom of the inspection order screen is for information describing the inspection itself, such as the inspection date, type, and inspector.

4th Dimension

File Edit View Admin About Help

Inspection

Contact Info Property Service & Fees Contract Comment Detail Matrix View Photos

Report # MVP2006NBA

Property Location

Address 1000 Payton Place

City/State/Zip Carrollton, TX 75007

Map Coordinate

Subdivision High Point Cross Street Main / Park Avenue

Directions

Take the long and winding road that leads to your door. Follow the yellow brick road to a place wher I belong near West Virginia. Pass the Heartbreak Hotel and turn right at the Hotel California.

Property Information

☐ Occupied

☒ Previously Inspected

Property Age 25

Roof Age 10

Sq. Footage 2750

of units 1

of Bedrooms 4

of Bathrooms 5

Utilities On/Off Will be on

Property Type Single Family

Foundation Basement

Additions/Alterations Finished Basement

Special Instructions

Take only pictures and don't leave footprints.

Save Cancel Previous Next Print Work Order Delete

Property Information

The second tab on the inspection detail screen is for information describing the property location. There is even a field to store directions to the location.

There also are fields for tracking information describing the property itself. There are modifiable pick lists for property type, foundation, additions/alterations to help keep data consistent from inspection to inspection.

4th Dimension

File Edit View Admin About Help

Inspection

Contact Info Property **Service & Fees** Contract Comment Detail Matrix View Photos

Report # MVP2006NBA

Invoice Detail

Invoice Date 12/08/06 Invoice #
 Inspection Date 12/31/06 Terms Payment Due Upon Receipt
 Inspector Michael Nickley Paid By

Services and Fees

DESCRIPTION	AMOUNT
Base Fee	\$250.00
Termite Fee	\$125.00
Crawlspace Fee	\$50.00
Discount	(\$25.00)
Coupon	(\$25.00)

Add Fee...
Remove Fee...

Tax and Total

Taxes	6.50%	\$24.37
TOTAL AMOUNT		\$399.37
PAYMENT		\$75.00
BALANCE DUE		\$324.37

Save
Cancel
Previous
Next
Print Invoice

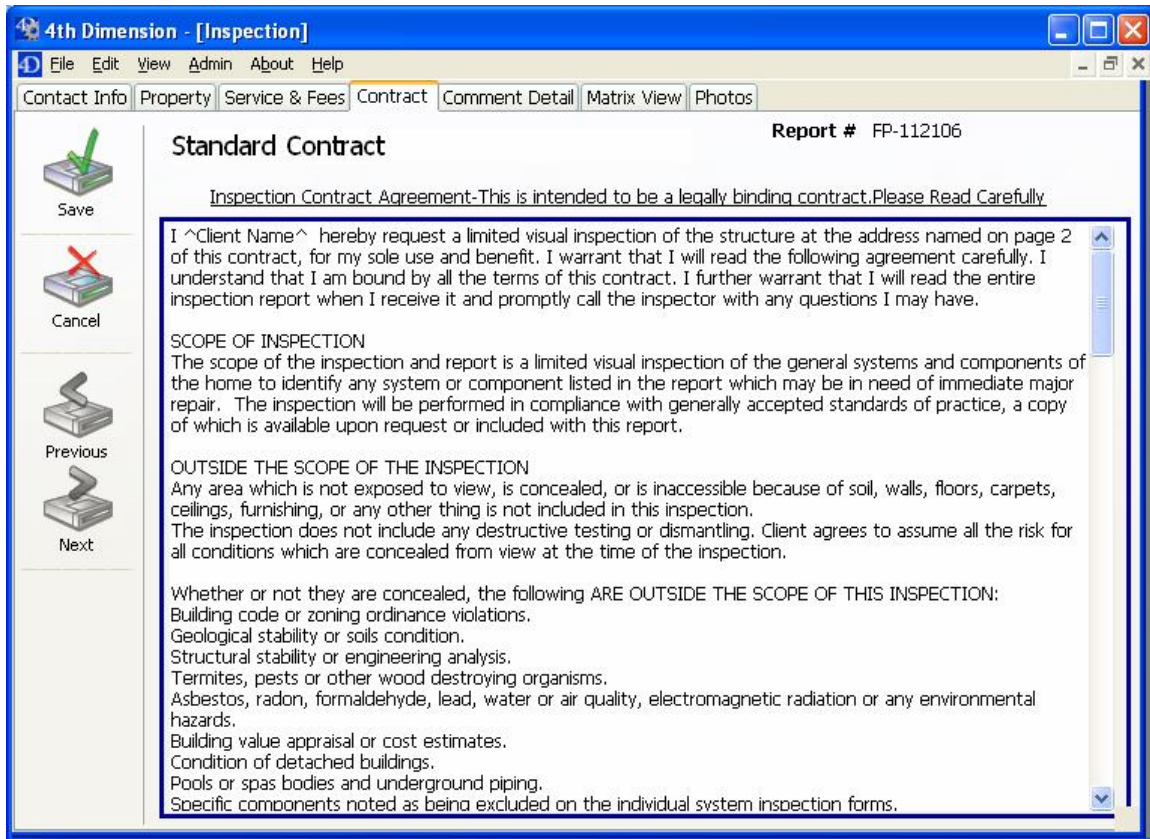
Service and Fees

The “Service & Fees” tab is for entering billing and fee information. The total is calculated automatically.

Click on the “Add Fee...” button to create a fee for this inspection. The following fee selection dialog will appear. Click on an item to select. Click the “OK” button to add the selected item to the inspection. To edit the fee for current inspection, click on the fee item name or amount and edit as desired.

To remove a service and fee, single-click on the dollar value of the fee to be removed and click the “Remove Fee...” button.

To print an invoice or work order, simple go to the “File” menu and click on “Print Invoice” or “Print Inspection Order”.



Contract

The “Contract” tab allows you to view the default contract language as it relates to the current inspection. The contract language cannot be edited from within the inspection detail contract tab. Contract language must be edited from the actual contract list. (Refer to the Contracts section of this user guide for more detail.)

Comment Detail

The screenshot shows the '4th Dimension - [Inspection]' application window. The 'Comment Detail' tab is active, displaying inspection data for Report # 501-11-8-06A. The interface includes a sidebar with navigation icons (Save, Cancel, Previous, Next) and a main content area with input fields for inspection details and a table for category-specific comments.

Report # 501-11-8-06A

Property Inspection

Inspection Date: 11/08/06
Client Name: Nash

Property Location

Address: 1000 Peyton Place
City/State/Zip: Carrollton, TX 75007

Comments

This is the general comment area for the overall inspection.

Completed :	Title	Comments
<input checked="" type="checkbox"/> Yes	GENERAL INFO	
<input checked="" type="checkbox"/> Yes	GROUND	GROUND: Common cracks up to 1/4" were noted in the
<input checked="" type="checkbox"/> Yes	EXTERIOR	EXTERIOR WALLS: Wall insulation type and value is not
<input checked="" type="checkbox"/> Yes	FOUNDATION	GRADING: This inspection does not include geological co
<input checked="" type="checkbox"/> Yes	ROOF	TILE ROOF: Roofs of this material are often not walked c
<input checked="" type="checkbox"/> Yes	PLUMBING	SUPPLY LINES: Underground pipes or pipes inside walls
<input checked="" type="checkbox"/> Yes	HEATING	HEATING: If a fuel burning heater/furnace is located in s
<input checked="" type="checkbox"/> Yes	HEAT2/COOL	NORMAL CONTROLS: Thermostats are not checked for c
<input checked="" type="checkbox"/> Yes	ELECTRICAL	MAIN PANEL: Six or fewer breakers usually do not requir

The “Comment Detail” tab provides the user direct access to the comments for any category or step for the current inspection.

4th Dimension - [Inspection]

File Edit View Admin About Help

Contact Info Property Service & Fees Contract Comment Detail Matrix View Photos

GENERAL INFO GROUNDS EXTERIOR FOUNDATION ROOF PLUMBING HEATING HEATING #2 HEAT2/COOL ELECTRICAL INTERIOR INTERIOR-2 GARAGE KITCHEN

Page 4 EXTERIOR Report #: FP-112106

REPORT KEY - EVALUATIONS RECOMMENDED IN THE REPORT SHOULD BE COMPLETED PRIOR TO THE END OF CONTINGENCY PERIOD/TRANSACTION

KEY: (1) Recommend evaluation by a structural engineer/geo-technical engineer (3) Refer to qualified termite report for further information (5) Upgrades are recommended for safety enhancement
 (2) Recommended evaluation and repairs by a qualified professional (4) This item is a safety hazard - correction is needed * This item requires monitoring and/or maintenance repairs

08 Exterior Stairs Appears Serv... ☒ Material:+ ☒ Location:+ ☐ Deterioration / Damage (2) ☒ Near end of lifespan (2)
☐ Not functional (2) ☒ Not fully visible ☒ Moisture stains / damage (2) ☐ Earth contact * (3) ☒ Uneven rise / run (2) (4)
☐ Improper / no landing (2) (4) ☐ Railing:+

09 Exterior Walls Appears Serv... ☒ Structure:+ ☒ Wall Covering:+ ☐ Deterioration / Damage ☒ Near end of lifespan (2)
☐ Not functional (2) ☒ Not fully visible ☒ Common cracks * ☒ Major cracks (1) ☐ Cracks / openings need repairs (2)
☐ Soil contact * (3) ☒ Moisture stains / damage (2) (3) ☐ Damaged / cracked:+ ☒ Nailing defects *

10 Trim Appears Serv... ☐ Material:+ ☐ Deterioration / damage (2) ☐ Near end of lifespan (2) ☐ Not functional (2)
☐ Not fully visible * ☐ Moisture stains / damage at: (2) (3)+ ☐ Caulking / paint / finish needed * ☐ Flashing / trim damaged at:+

11 Chimney(s) Repairs Recom... ☒ Location:+ ☒ Material:+ ☒ Deterioration / Damage (2) ☒ Near end of lifespan (2)
☒ Not functional (2) ☒ Not fully visible ☒ Chimney / brick / mortar:+ ☒ Flashing is improper / not visible (2) ☒ Spark screen:+
☒ Raincap recommended * ☒ Cracks and separations noted (2) ☒ Unlined flue (2) (4) ☒ Cracks in chimney cap (2) ☒ Ash dump door is:+

Matrix View

The “Matrix View” tab provides a view of the inspection data in roughly the same format as the ITA Matrix style printed output. Tabs across the top of the screen can be used to navigate the various sections of the report. The arrow buttons “< >” at the far right of the tabs will allow for scrolling to tabs that do not fit on the screen all at once.

The “Matrix View” can be used to make some final tweaks to the inspection data before printing the final report to a PDF. Ratings, Checkboxes, and Step Comments can all be modified from this view.

Click the “Expand” button for any give step to view its corresponding step comment in its entirety. Edit the comment as needed. Pick additional comments from the comment pick list.

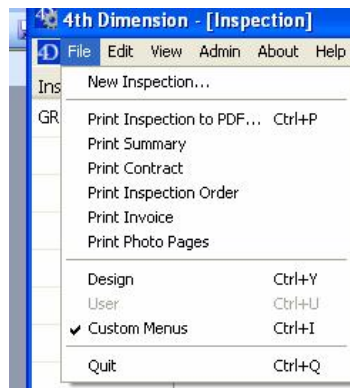
(Note – Checkboxes with “Fill-in-the-Blank” functionality must be entered in InspectNOW PC or Pocket InspectNOW. You can only check or uncheck those items in the Matrix View.)

(Note – Any given step will have a number of checkboxes associated with it. In most cases those checkboxes will fit on the 3 lines provided for that step. Occasionally, the checkbox text will extend beyond the right border of the Matrix View page. This only

occurs in the online Matrix View. When the actual PDF is generated the text will automatically word-wrap to conform to the borders of the report.)

Printing from InspectNOW Office

Printing Inspections, Contracts, Work Orders, Invoices, Photos, etc. is done from the “File” menu. Selecting an inspection from the Inspection list or opening an inspection from the list by double-clicking it will activate the various print items located in the “File” menu.



Print Inspection to PDF – Creates a read-only file of the inspection and its various components that can be emailed or save to disk.*

Print Summary – Creates a read-only file of the Summary section of an inspection report.*

Print Contract – Prints the contract for a particular inspection.*

Print Inspection Order – Prints the “Work Order” for a particular inspection.*

Print Invoice – Prints a customer “Invoice” for a particular inspection.*

Print Photo Pages – Creates a read-only file of the Photo Pages section of an inspection report.

* This menu item is only available when an inspection has been selected from the inspection list, or while viewing an inspection detail screen.

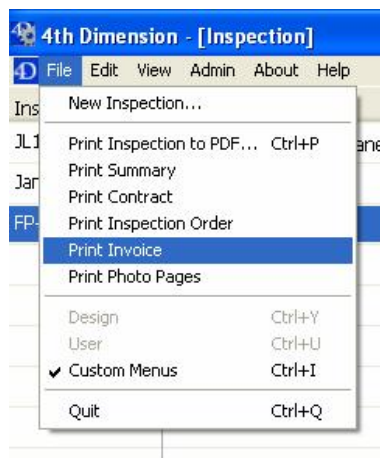
Printing an Invoice and an Inspection Order

There are several different ways to print reports and documents from InspectNOW Office. The easiest way is to use the “View” menu and select “Inspections” to bring up the inspection list.

Printing an Invoice

[illegible]

From the Inspection List, “Single-click” to select the inspection for which you wish to print something. By selecting the inspection, you will activate items in the “File Menu” that allow you to print. Click on the “File Menu” to view the various print items as shown below.



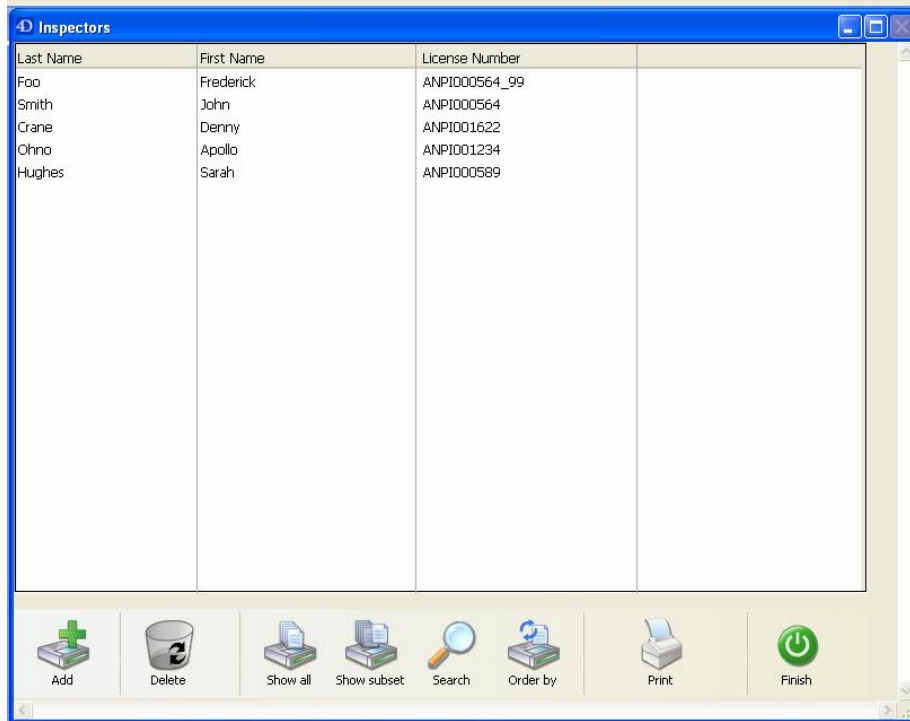
Print Inspection to PDF...

This item will present you with a dialog box allowing the selection of parts of the inspection that to be included in a single PDF (portable document format, better known as Acrobat format) document to be saved on your PC.

Miscellaneous Administration

Adding and Modifying Inspectors

Use the “View” menu and select “Inspectors” to bring up the inspector list.



To add a new inspector to the list, click the “Add” button in the lower left portion of the screen. To edit an existing inspector record, double-click on the inspector record that you want to edit.

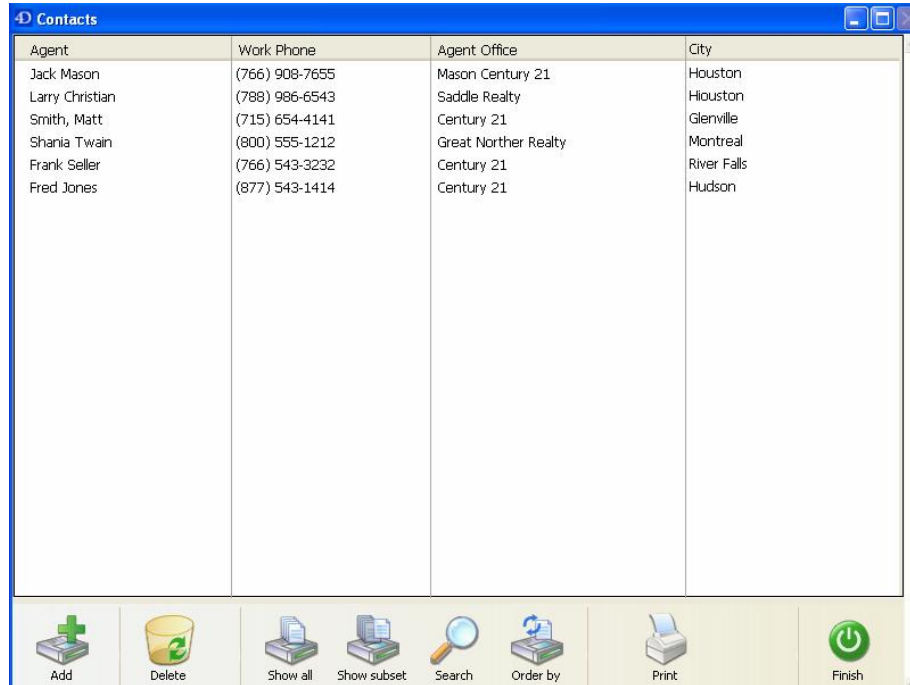
The image shows a software window titled "Inspectors" with a blue header bar. On the left side of the window is a vertical toolbar containing icons for "Save", "Cancel", "First", "Previous", "Next", "Last", and "Delete". The main area of the window is titled "Inspector" and shows "4 of 5" in the top right corner. It contains a form with the following fields and values:

Field	Value
First Name	Apollo
Last Name	Ohno
Full Name	
Logon_Username	Apollo
Logon_Password	*****
Active	<input checked="" type="checkbox"/>
Suspended	<input type="checkbox"/>
License #	ANPI001234
InspectionCompanyID	3

The inspector entry screen will appear. Add or modify inspector information as desired and click the “Save” button at the top left of the screen to keep the changes.

Entering and Modifying Agents

Use the “View” menu and select “Agents” to bring up the agent list.



Agent	Work Phone	Agent Office	City
Jack Mason	(766) 908-7655	Mason Century 21	Houston
Larry Christian	(788) 986-6543	Saddle Realty	Houston
Smith, Matt	(715) 654-4141	Century 21	Glenville
Shania Twain	(800) 555-1212	Great Norther Realty	Montreal
Frank Seller	(766) 543-3232	Century 21	River Falls
Fred Jones	(877) 543-1414	Century 21	Hudson

To add a new agent to the list, click the “Add” button in the lower left portion of the screen. To edit an existing agent record, double-click on the agent record that you want to edit.

Contacts Agents 3 of 6

Save

Cancel

First

Previous

Next

Last

Delete

Agent:

Company:

Address:

City/State/Zip:

Work Phone: Resident Phone:

Fax:

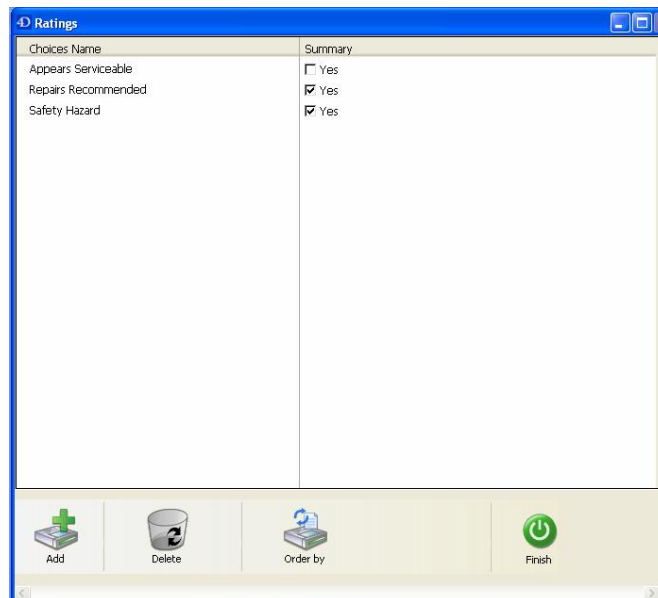
E-mail:

The agent entry screen will appear. Add or modify agent information as desired and click the “Save” button at the top left of the screen to keep the changes.

Entering and Modifying Ratings

Step ratings used in the inspection report must be maintained in the ratings list in InspectNOW Office in order to properly generate reports. If a rating choice has been added to in Template Maker it also must be added here in InspectNOW office. (Note – Modifications to the ratings list made in InspectNOW Office **WILL NOT** change the ratings list on your PocketPC.)

Use the “View” menu and select “Ratings” to bring up the rating list.



Choices Name	Summary
Appears Serviceable	<input type="checkbox"/> Yes
Repairs Recommended	<input checked="" type="checkbox"/> Yes
Safety Hazard	<input checked="" type="checkbox"/> Yes

Buttons: Add, Delete, Order by, Finish

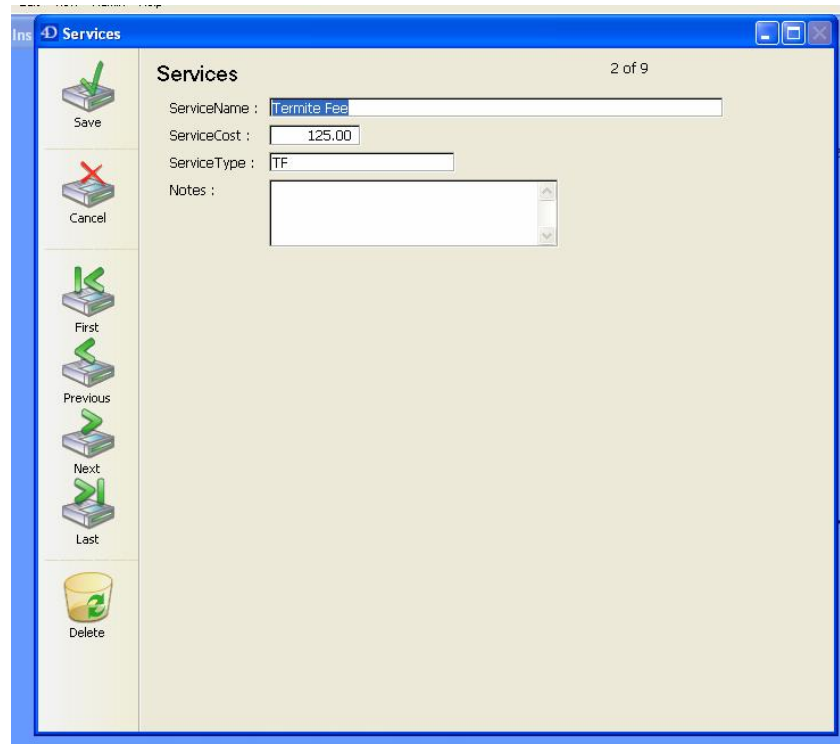
To add a new rating to the list, click the “Add” button in the lower left portion of the screen. To edit an existing rating record, double-click on the rating record that you want to edit.

The rating entry screen will appear. Add or modify rating information as desired and click the “Save” button at the top left of the screen to keep the changes.

Entering and Modifying Services

The list of services made available in the inspection order screen can be modified as follows: Use the “View” menu and select “Services” to bring up the service list.

To add a new service to the list, click the “Add” button in the lower left portion of the screen. To edit an existing in service record, double-click on the service record that you want to edit.



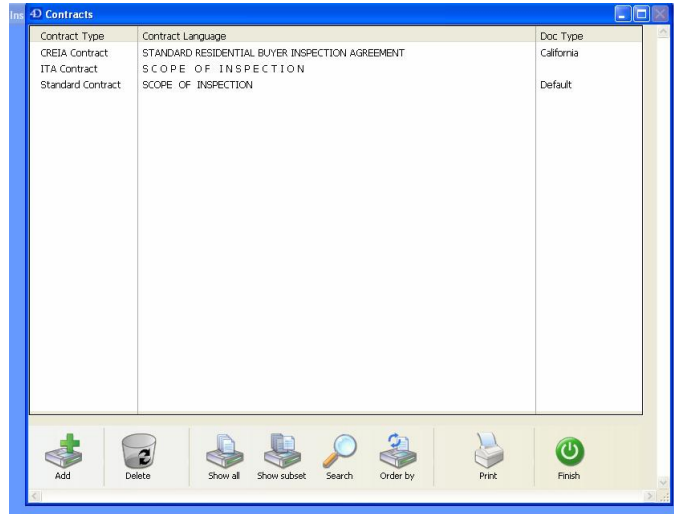
The screenshot shows a software window titled "Ins Services". On the left side, there is a vertical toolbar with the following buttons: "Save" (green checkmark icon), "Cancel" (red X icon), "First" (green arrow icon), "Previous" (green arrow icon), "Next" (green arrow icon), "Last" (green arrow icon), and "Delete" (yellow trash can icon). The main area of the window is titled "Services" and indicates "2 of 9" records. It contains the following fields:

- ServiceName :
- ServiceCost :
- ServiceType :
- Notes :

The service entry screen will appear. Add or modify service information as desired and click the “Save” button at the top left of the screen to keep the changes.

Entering and Modifying Contracts

Use the “View” menu and select “Contracts” to bring up the inspector list.



To add a new contract to the list, click the “Add” button in the lower left portion of the screen. To edit an existing in contract record, double-click on the contract record that you want to edit.

4th Dimension - [Contracts]

File Edit View Admin About Help

Contract Detail 4 of 6

Contract Type: ☒ Default Contract

Spell Check... Merge Field Picklist: Additional Fees

Language

I ^Client Name^ hereby request a limited visual inspection of the structure at the address named on page 2 of this contract, for my sole use and benefit. I warrant that I will read the following agreement carefully. I understand that I am bound by all the terms of this contract. I further warrant that I will read the entire inspection report when I receive it and promptly call the inspector with any questions I may have.

SCOPE OF INSPECTION
The scope of the inspection and report is a limited visual inspection of the general systems and components of the home to identify any system or component listed in the report which may be in need of immediate major repair. The inspection will be performed in compliance with generally accepted standards of practice, a copy of which is available upon request or included with this report.

OUTSIDE THE SCOPE OF THE INSPECTION
Any area which is not exposed to view, is concealed, or is inaccessible because of soil, walls, floors, carpets, ceilings, furnishing, or any other thing is not included in this inspection. The inspection does not include any destructive testing or dismantling. Client agrees to assume all the risk for all conditions which are concealed from view at the time of the inspection.

Whether or not they are concealed, the following ARE OUTSIDE THE SCOPE OF THIS INSPECTION:
 Building code or zoning ordinance violations.
 Geological stability or soils condition.
 Structural stability or engineering analysis.
 Termites, pests or other wood destroying organisms.
 Asbestos, radon, formaldehyde, lead, water or air quality, electromagnetic radiation or any environmental hazards.
 Building value appraisal or cost estimates.
 Condition of detached buildings.
 Pools or spas bodies and underground piping.
 Specific components noted as being excluded on the individual system inspection forms.
 Private water or private sewage systems.
 Saunas, steam baths, or fixtures and equipment.

The contract entry screen will appear. Add or modify contract information as desired and click the “Save” button at the top left of the screen to keep the changes.

Merging Inspection Data into Contracts

Inspection data can be automatically merged into contract documents when they are printed for a particular inspection. To make inspection field data appear in a contract, first, place the cursor into the contract “Language” area where the field data is to be merged. Then select the desired field from the “Merge Field Pick list”. A field reference will be placed into the contract language. This field reference will be replaced with the corresponding inspection data when the contract is printed for a particular inspection.

Some of the standard contract templates that shipped with the software already have merged field references for you convenience.

Entering and Modifying Inspection Comments

There are two different ways to edit comments for a particular inspection.

One way is to edit the comment directly in the inspection detail screen. The main advantage to that method is the ability to modify checkbox items, and ratings as well as the comments all on one convenient screen for each category. It also allows the user to view the comments in generally the same format as the ITA Matrix Form. (See “Modifying Inspection Detail” for more information.)

A more direct way to edit comments is to use the comment button for the particular inspection. This button provides direct access to a series of screens that allow the user to focus on the comments only, without viewing the ratings and checkbox information. These screens are engineered to provide the most efficient way to access the specific comment that needs to be viewed or modified.

To access comments using either method an inspection must be selected first. Use the “View” menu and select “Inspections” to bring up the inspection list. Double-click on the inspection record to edit it.

Inspection Order Form

Client
Last Name: First Name: Work/Day Phone:
Address: Home/Eve Phone:
City/State/Zip: E-mail:

Property Location
Address: Day Phone:
City/State/Zip: Evening Phone:
Cross Street: Map Coordinate:
Directions: Subdivision:

Property Information
Utilities On/Off: ☐ Occupied: ☐ Previously Inspected: ☐ Property Age: # of units:
Property Type: Foundation: Additions/Alterations: Roof Age: # of Bedrooms:
Sq. Footage: # of Bathrooms:
Special Instructions:

Agent Information
Buyer's Agent: Company: Phone: More...
Listing Agent: Company: Phone: More...

Inspection Information
Date: Inspection Type:
Time: Confirmation Prior: ☐ Buyer's Agent ☐ Seller's Agent ☐ Client
Inspector: Ordered By: Referred By:

Billing & Fees
Additional Fees: Base Fee:
Services: \$150
Services: \$0
Total:
More Services...
Invoice...

Navigation: Save, Cancel, First, Previous, Next, Last, Print

Buttons: Inspection Detail, Comments

The inspection order screen will appear. The buttons at the bottom of the inspection order screen provide the two options of editing comments. Click the “Comment Detail” button to edit comments only by category and step as described in method two above.

(Note – you can navigate between comment detail and inspection detail screens using the respective navigation buttons provided on those screens.)

The top-level comment entry screen will display the inspections general comment field and a list of categories. Edit the general comment right from this screen.

To edit comments for a particular category, double-click on the desired category. A category comment screen will appear where you can edit the category comment. Along with the category comment, there is list of steps and their associated comments.

Double-click a step record to edit that comment.

Step Comment Entry

The screenshot displays the '4th Dimension InspectNOW' application window. The title bar indicates '2 of 7' steps. The interface is divided into several sections:

- Left Sidebar:** Contains navigation buttons: 'Save' (green checkmark), 'Cancel' (red X), 'First' (green arrow), 'Previous' (green arrow), 'Next' (green arrow), 'Last' (green arrow), and 'Delete' (trash can).
- Top Section:** Labeled 'Exterior Walls'. It includes a 'Property Inspection' dropdown menu and a 'Property Location' section with fields for 'Address' (123 Chesterfield Way) and 'City/State/Zip' (Carrollton, TX 75007).
- Form Fields:** Below the top section are fields for 'Inspection Date' (05/09/05) and 'Client Name' (Jordan).
- Comments Section:** A large text area for entering comments. The existing comment reads: 'Moisture damage was noted at the exterior walls at the time of the inspection. <PictTag type="generic" path="picture-12" scaling="100" photoTitle="COMPONENTS" />'. Below this is a large empty space for additional text.

The step comment entry screen will appear. Edit the comment and click the “Save” button to keep the changes.

Modifying Inspection Report data

Modifying Inspection Report Detail

Use the “View” menu and select “Inspections” to bring up the inspection list. Single-click an inspection record to select it. From the “Edit” menu select “Edit Inspection”. The inspection detail screen will appear for the selected inspection.

Scroll Tabs

4th Dimension

File Edit View Admin Help

GENERAL INFO GROUNDSS EXTERIOR FOUNDATION ROOF PLUMBING HEATING HEAT2/COOL ELECTRICAL INTERIOR INTERIOR-2 GARAGE KITCHEN BATHROOMS

Page 3 **GROUNDSS** Comments Setup Save Report # 28754

REPORT KEY - EVALUATIONS RECOMMENDED IN THE REPORT SHOULD BE COMPLETED PRIOR TO THE END OF CONTINGENCY PERIOD/TRANSACTION

KEY: (1) Recommend evaluation by a structural engineer/geo-technical engineer (3) Refer to qualified termite report for further information (5) Upgrades are recommended for safety enhancement
(2) Recommended evaluation and repairs by a qualified professional (4) This item is a safety hazard - correction is needed * This item requires monitoring and/or maintenance repairs

01 Driveway Appears Servic... Material:* Deterioration / Damage (2) Near end of lifespan (2) Not functional (2)
Not fully visible Eroded asphalt * Maintenance / sealant needed * Evidence of poor drainage * Common cracks *
Major cracks * Surface raised * Surface settled * Trip hazards (5)
The drive... Expand
Recommend further evaluation and repairs as needed by a qualified professional based on visible conditions noted during the inspection. (2)

02 Sidewalks Appears Servic... Materials:* Deterioration / Damage (2) Near end of lifespan (2) Not functional (2)
Not fully visible * Common cracks * Major cracks * Surface raised * Surface settled *
Trip hazards (5) Poor drainage / improper slope *
The side... Expand

03 Retaining Walls Appears Servic... Location(s):* Material:* Deterioration / damage Near end of lifespan
Not functional Not fully visible * Common cracks * Major cracks (1) Moisture penetration *
No drainage openings *
The retain... Expand

04 Patio Appears Servic... Location(s):* Material:* Deterioration / Damage (2) Near end of lifespan (2)
Not functional (2) Not fully visible * Common cracks * Major cracks (1) Surface raised *
Surface settled * Trip hazards (5) Evidence of poor drainage *
The patio... Expand

05 Patio Cover Appears Servic... Location(s):* Open design Covered roof (see Roof page) Deterioration / Damage (2)
Near end of lifespan (2) Not functional (2) Not fully visible * Lacks proper attachment (2) Unsecure attachment (2)
Earth contact (3) Moisture damage (2) (3) Unable to determine active leakage
The patio ... Expand

Use the drop-down lists to change ratings. Click on a checkbox item to check or uncheck it. Edit the step comments directly, or click the “Expand” button for a particular step to view and edit its comments. Use the comment drop-down list to pick comments to be added to a step. (For more expanded comment access see “Entering or Modifying Comments”.)

Modifying the General Notes for an Inspection report

From the Inspection Detail screen, click on the “General Notes” tab to view and modify the general inspection notes. (You may have to click the tab scroll arrows in order to see the “General Notes” tab.)

Viewing the Summary information for an inspection report

From the Inspection Detail screen, click on the “Summary” tab to view the summary information for the current inspection. (You may have to click the tab scroll arrows in order to see the “Summary” tab.)

To modify comments that appear on the summary, they must be edited via the inspection comment editor. View an inspection from the Inspection Order Form and click the “Comment Detail” button to bring up the inspection comment editor. (See “Modifying inspection comments” under Miscellaneous Administration.)

Definition of Terms

4th Dimension (4D) – The database software engine that works behind the scenes in the InspectNOW Office software.

Agents – The buyer's and/or seller's real estate agents involved in the property transaction.

Inspection Comments – The comments have been entered by the inspector during the course of the inspection for various areas of the property. There are general comments, category comments, and step comments. General comments appear on the General Notes page of the inspection report. Category comments appear in italic with each corresponding step. Step comments appear beneath the material check boxes for each step in the Matrix style report.

Inspection Data – The data that is collected in the field during the course of an inspection. It is the content of the actual inspection with ratings, comments, checkbox items, pictures, etc. It is literally the “answers” to all the inspection questions.

Inspection Detail – The inspection detail screen is where the categories, steps, ratings, and comments can be viewed and edited in the ITA Matrix format. To view inspection detail from the inspection order form, click the “Inspection Detail” button at the bottom of that screen.

Inspection Order Form – The entry screen used to enter information about the client, property location, property type, agent and general inspection service information. It is also the form from which an inspection order and invoice can be printed. When an inspection is double-clicked from the inspection list it will be displayed with the inspection order form.

InspectionID=xx Folder – For every inspection that is imported into the InspectNOW Office system, a folder is created on the PC to store pictures that belong to that inspection. When transferring picture files from a digital camera, they must be placed into the appropriate InspectionID folder in order to be merged with the corresponding inspection.

InspectNOW Office software – The PC based software used in conjunction with the Pocket InspectNOW and InspectNOW PC software to print inspections, inspection orders, invoices, and create PDFs.

(Definition of Terms con't)

InspectNOW PC software – The PC based software used to collect inspection data out in the field on a laptop or tablet PC. InspectNOW PC software performs the same function as the Pocket InspectNOW software only it is designed to be used on laptop, tablet, or desktop PC. (Note: in order to print the ITA Matrix Form report, inspections must be exported from the InspectNOW PC software and imported into the InspectNOW Office software.)

Pocket InspectNOW software – The PocketPC based software used to collect inspection data out in the field via a mobile handheld device. Inspection data can be printed directly from the PocketPC software in the narrative format or exported and transferred to the InspectNOW Office software on a standard PC in order to print the ITA Matrix Form report.

PDF – The stands for “Portable Document Format”. It is a generic document format that supports text and graphics and can be read with Adobe Acrobat Reader or other PDF reader software.

PocketPC – A handheld device used to collection inspection information out in the field. It is the portable data collection hardware on which InspectNOW for PocketPC is installed.

Template Data – The data that forms the structure for collecting inspection information. Template data defines the questions, pick-lists of potential answers, and checkbox items that will be made available to the inspector while he/she is performing the inspection. Template data can be customized on the PC using the Template Maker application and downloaded to the PocketPC for use in the field.