



Quick Start

Video Book

Time 0:00 Intro

HOMETREX™

Version 14.1

Basic Report Writing Features

This 7 minute video covers only a few of the basics of HomeTrex Home and Commercial Inspection Report to help get you started. Advanced customization features are covered in detail in other videos. The features covered in the video also apply to **Vanguard™**.

HomeTrex is infinitely customizable. Use any of the built-in templates to create any type of report from checklist to complete narrative or anything in between. You are limited only by your imagination.

View additional videos at www.BestInspectors.TV or in the Support section at BestInspectors.Net

Thank you for watching!

Time 0:25 Inspection Job Details Form

The first screen you will see when you launch the report is the Inspection Job Details form.

We will start by setting up the job. Click on the Clear Form button to begin. All fields will clear except the Job ID field. The only mandatory field in the form is the Job ID.

The Job ID will also be the file name for the report. Inspection details are entered into the Inspection Job Details form. The information entered here will be placed in several places throughout the report and accompanying documents such as the Job Order form, Inspection Agreement and Invoice.

There are three tabs on the Inspection Job Details form:

Job, where the date and address are entered

Client, where client name and contact information are entered

Agents, where real estate agents names and contact information are entered

Don't worry if you don't have all the information. You can go back to the form at any time by selecting "Inspection Details" from the Job Set-up drop-menu in the upper left corner of your screen. Only the Job ID must be filled in when initially setting-up a job. All other fields are optional and can be completed at any time.

The last tab on the Job Details form is Help. The Help screen gives you some basic information about the report but you can also use it to record your own private notes that you do not want to include in the report.

Click on one of the Finish Set-up buttons after you have completed the form. A new file will be created and you can continue working on your report.

Modify your Master Template or any other report template by clicking on the Cancel button. Any changes you make to your template will be permanent. After you have finished modifying our template, select File/Save in the top left corner of your screen. You can begin a new report by opening selecting Inspection Details from the Job Set-up drop menu.

Time 0:51 Inspector Information

The information entered here, as with the Job Information, will be placed in several places throughout the report and accompanying documents such as the Job Order form, Inspection Agreement and Invoice.

The inspector's information only needs to be entered once in your Master Template. It is not necessary to enter the inspector's information in each report.

Click on the OK button after you have completed the form.

Time 1:05 Main Control Panel

The Main Control Panel is laid out such that the controls you use most often are at the left and in the general order that you would use them while writing a report. This video only covers the most basic controls and features. There are additional videos on BestInspectors.TV and BestInspectors.Net that cover individual controls and features in detail.

HomeTrex is completely customizable and you can create an unlimited number of templates. To get you started, we have two complete and ready to use templates, one for residential and one for commercial. The ready-made templates are based on our own years of experience as inspectors and feedback from thousands of customers over the years. If you are a new inspector, we recommend that you start with the ready-made templates and create your own as you develop your own style.

There are a variety of ways to navigate through the reports. The two you will use most often are the tabs at the bottom of your screen and the Go to Section drop down in the Navigation Group. The Tabs at the bottom of your screen are the order in which the report is laid out. Of course, you can reposition the individual sections if you prefer to have them in a different order. The Go to Section drop down lists the sections in alphabetical order. Either way, only the sections that you have included in your report are visible in the navigation menus.

Time 1:15 Select Pages

You can add or remove sections using either Select Pages in the Job Set-up Group or My Report in the Navigation group on the Main Control Panel. Select any combination from the large collection of pre-defined sections or create your own from any of the included templates.

Time 1:21 Tools

There Tools listed in the drop-down in the Navigation section are not covered in this video. There are some powerful tools that you will want to use at times such as photo editing, Tablet specific controls, Administrative functions, Advanced Editing and the ability to create a Table of Contents.

Time 1:28 Contextual Tabs and Photo Editing

Photo editing is turned on by selecting Show Contextual Tabs. Contextual Tabs are menus that appear based on what you are doing at the time, such as editing photos, editing annotation elements or using Table specific features while working on a Tablet. Basic photo editing will be briefly demonstrated later in this video at 5:14.

Time 1:51 Inserting Photos

Inserting, editing and annotating photos are as easy as a couple of mouse clicks. All photos are automatically sized and positioned for you. There is room at the top of the Cover page for you to insert your company logo or a banner. The logo or company banner will be positioned for you but you can resize it and reposition it by clicking on it and using the drag bars.

Time 2:00 Job Order, Invoice, Inspection Agreement and General Information

Much of the information needed on the Job Order, Invoice, Inspection Agreement and the General Information page are already completed for you based on the information you provided in the Inspection Job Details form. If you need to add to or change the information, always use the form so it will update wherever needed.

Enter your pricing on the Job Order form. The details will automatically carry over to the Invoice and Inspection Agreement for you. You will need to put quantities where required on the Invoice. The Inspection Agreement can be edited to suite your needs and preferences.

The Job Order, Invoice, Inspection Agreement or any other section of the report can be printed individually by selecting Print Individual Pages from Page Tasks drop-menu.

Time 2:33 Customization

The level of customization available in HomeTrex is unprecedented in the Home and Commercial inspection world. Every section in the report is customizable. You can add or remove sections from the pre-defined templates, you can build entirely new sections using any or the included page templates as a starting point. With only a very few exceptions, you can modify any field in any section of your report.

Time 3:10

You can turn checkboxes off and on so you can have a report with checkboxes or a completely narrative report or anything in between. You can add an unlimited number of checkboxes using the Checkbox Generator in the Annotation group of the Main Control Panel.

Time 3:20 Entering Text

A major advantage to HomeTrex over most inspection software is that you are working in a "What You See Is What You Get" environment. You are working directly in the report so you are not guessing what your finished report is going to look like. You have complete control over its contents and its appearance.

Each sub-section has a default number of rows that is sufficient for most purposes. The yellow lines along the right side of the page are guide lines that define the normal work area. You can add an unlimited number of rows to any subsection or delete rows if you don't need them. An easier way to

remove all unneeded rows at once for the entire section is to Compact the entire section. The Compact function is described at 6:02.

There are FOUR ways to put text into a Text Field

1. Use the drop-downs assigned to each field
2. Use the Global Search and Retrieval to pull any comment from any of the 428 Library categories with only a couple of mouse clicks. You only need to enter in a key word or phrase. HomeTrex will search your entire Library and present you with a list of all narratives that contain your search phrase.
3. Use the Comment Library Assembly Wizard to retrieve multiple comments simultaneously. The CLAW a super-charged alternative to the drop-down method. You can also choose to have your comments bulleted or not bulleted. The use of bulleted comments makes a report easier to read.

Time 4:08 Comments Library Assembly Wizard™

CLAW™ - Comments Library Assembly Wizard™

- Select a comment from the list, click the Add button
- Choose as many comments as you want
- The comments can be bulleted or not bulleted
- Click on Insert when you are done

All your selected comments will be placed in your report

Time 4:36 Total Control Summary™

You should decide what goes into your Summary or doesn't go into your Summary. Your inspection software shouldn't decide for you. HomeTrex's Total Control Summary™ allows you to set the narrative content of the first row of each section automatically to be placed in the Summary by right-clicking in the Deficient column. The automated feature can be turned off if you don't want text to be put in the Summary automatically. HomeTrex will prompt you to choose where you want to place the text in the Summary Section.

You can also place the content of any section in the Summary simply by placing your cursor in the field and tagging it with the +Summary button in the Annotate section of the Main Control Panel. If you want, you can format or rearrange the content in the Summary Section.

Time 4:56 Photo Insertion and Placement

Place Photos in your report by selecting Cover, Left/Right for two across, or Left/Middle/Right for three across. Photos will be sized and positioned automatically. You can insert an unlimited number of photos into the report by adding rows. Add rows by selecting Add from the Rows Group of the Main Control Panel.

Time 5:14 Photo Editing

Photo editing is turned off by default. Turn on photo editing by turning selecting Show Contextual Tabs in the Tools menu of the Navigation group on the Main Control Panel. With Contextual Tabs on, the Picture Tools menu will appear above the Main Control Panel whenever you click on a photo.

Picture Tools include brightness and contrast adjustments, color adjustments, frames and a variety of artistic effects.

Time 5:29 Photo Annotation

Annotate your photos with arrows, circles of any of a variety of other annotation elements. There are three default arrow colors and one default circle color. The color of any annotation element can be changed by right-clicking on it and selecting Format Shape.

Select the arrow or other annotation element from the Annotate group of the Main Control Panel. The element will be placed in the upper left corner of the field where your cursor is located. Use your mouse to drag the element to the proper location on your photo. Rotate or resize an element by pressing and holding your left mouse button while selecting one of the grab circles on the element.

The thickness, color and other attributes of any annotation element can be changed by right-clicking on it and selecting Format Shape.

Time 5:52 Category Assignment Tool

The Category Assignment Tool™ (CAT™) is a versatile multi-purpose tool that you use to build report templates and edit your Comments Library. The Category Assignment Tool is covered in detail in other videos at www.BestInspectors.TV and in the Support section at BestInspectors.Net.

Time 6:02 Compact and Restore

Use Compact to tidy things up and remove extra white space. Compact is an easy way to remove all unneeded rows at once for the entire section. Compacting a section hides extra blank rows from the report without removing them. If you need to add to the report after a section has been compacted, use Restore. You can compact the section again after you have completed your editing.

Time 6:21 Paragraph Generator

There may be times when you have multiple individual comments that you want to format into a single paragraph. Highlight the comments to be combined into a paragraph by holding down your left mouse button and dragging. Then, click on the Paragraph button in the Rows group of the Main Control Panel.

Time 6:30 Create PDF or Print

The final step after you have finished writing your report is to either create a PDF of the report or print it. Select the appropriate button from the File Actions drop-menu on the Main Control Panel.

Conclusion

This brief video-book covered only the basic features of **HOMETREX™**. There are many more features that make your easy and efficient for you and easy for your customers to read and understand. Other features are covered in detail in individual videos.