InspectDeck Trial — Fast-Track Guide for Experienced Inspectors

InspectDeck Professional · Training Guide

InspectDeck Trial — Fast-Track Guide for Experienced Inspectors

Distributed Version | Switching from HomeGauge / Spectora / Horizon / Tap Inspect? Start Here | v1.2.1

> **Who this is for:** you already do paid inspections and know report-writing, and you installed the distributed **Trial** build (`InspectDeck Trial`). This guide skips *"what is a GFCI"* and focuses on **what's different in InspectDeck** so you're productive in under an hour.
>
> New to inspections entirely? Use `01-Training-Guide-Beginner.md` instead. Training a team? Use `03-Training-Guide-Trainer.md` .

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1. Mental Model Shift (5 min)

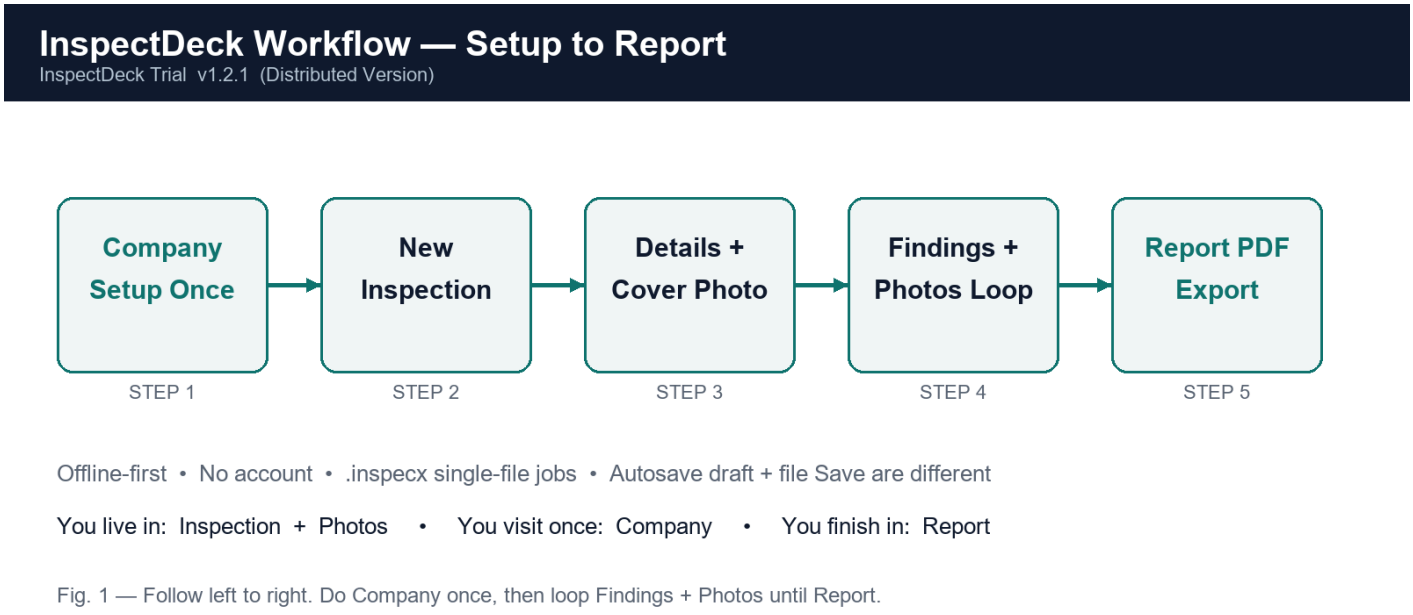


Fig. 1 — Follow left to right. Do Company once, then loop Findings + Photos until Report.

Offline-first Trial: no sync queue. Everything is a local file; one free account carries your subscription across two devices; Export unlocks on sign-in.

You expect (cloud tools)	InspectDeck Trial reality
Login → dashboard in browser	**No browser dashboard.** Launch `InspectDeck Trial` → local Welcome screen. One free account (email code) only carries your subscription across devices.
Trial is a limited web demo	**Full app, gated only at Export/Print.** 3-day trial clock; entering your key unlocks the same install — no reinstall.
Templates sync from cloud	**6 local templates**, fully editable per job; master Styles template in Company.
Comments live in web editor	**~1,190 local comments**, `{LOCATION}` / `{COMPONENT}` / `{TRADE}` placeholders filled on insert.

You expect (cloud tools)	InspectDeck Trial reality
Photos upload then optimize server-side	**Triple-write on import**: `original` + `optimized 1800px` + `thumb 420px`. UI never touches full-res.
Markup bakes into the upload	**Non-destructive**: coords stored, annotated JPG burned only at export. Rotate moves markup with image.
Report link to send client	**PDF file you export** (Letter, `Page X of Y` footer auto, requires active license). No portal.
Jobs sync across devices	`.inspecx` **ZIP you carry**. Double-click to open. Autosave draft separate from file Save.

Bottom line: if you can manage files in Explorer, you can manage InspectDeck. There is no *"where did my job go"* — it's the `.inspecx` you saved.

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2. Install & Unlock in 10 Minutes (Trial)

1. Run `InspectDeck-Trial-Setup-1.2.1-x64.exe` → SmartScreen **More info** → **Run anyway** (unsigned) → per-user folder → shortcuts (shortcut named `InspectDeck`, window title `InspectDeck Trial`).
2. The trial runs **3 days from first launch**. **Export/Print are blocked** until you activate (buttons, menus, `Ctrl+E`, form export, equipment export, form Print button, and `Ctrl+P` all use the same gate). No workaround — that's intentional. The equipment decoder separately allows **3 full lookups** (successful decodes only), then gates to a subscribe notice.
3. Bought? **Don't reinstall.** Sign in (Settings → Account, or the lock screen) with your email → enter the emailed code → Windows buyers paste the key once to link it (needs internet once). The subscription is re-confirmed about weekly; **14-day offline grace** covers field work. One subscription = two installations total (any mix of Windows/Android/iOS) — never buy twice for a second device.
4. After day 3 without a license the app locks; your `.inspecx` files and drafts reopen once licensed.
5. Confirm: Help → About shows 1.2.1. Company → Account card shows your badge/status and device list.
6. Short on time? Help → **Watch Overview Video…** plays the 4-minute narrated tour offline, and Help → **Training Guides** opens these written guides as PDFs — same files, no download needed.
7. Staying current: the app auto-checks GitHub on launch (opt out via Help → Check for Updates Automatically); skipped versions stay silent until you check manually. Confirmed downloads install with a restart — jobs and settings carry over.

Reinstalling does not reset the 3-day counter (first-run date is kept in app data and the Windows registry) — so spend the trial evaluating, and activate when ready.

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3. Migrate Your Brand in One Pass

Company tab is your one-time migration screen. 10 minutes:

- **Logo:** PNG transparent, auto-scaled 600px. Old logo with white box? Re-export transparent — it prints centered on cover.
- **Cert logos:** multi-select add (InterNACHI, CPI, IAC2, infrared, WDO, state/franchise). Reorder ←/→, optional printed labels. Prints as strip under main logo.
- **Accent:** pick your brand color (default `#0f766e`). Affects headers/badges/rules.
- **Footer + Scope/disclaimer:** footer is one line; disclaimer is rich-text (Bold/Italic/Underline/Strike/Font/Size/Colour/Align/Lists). **Paste = plain-text by design** — re-apply formatting after pasting your old SOP. Replace shipped text with your state-required language + agreement reference.
- **Save profile** — also snapshots into open job's `project.company`. Check the License card on the same screen for activation status.

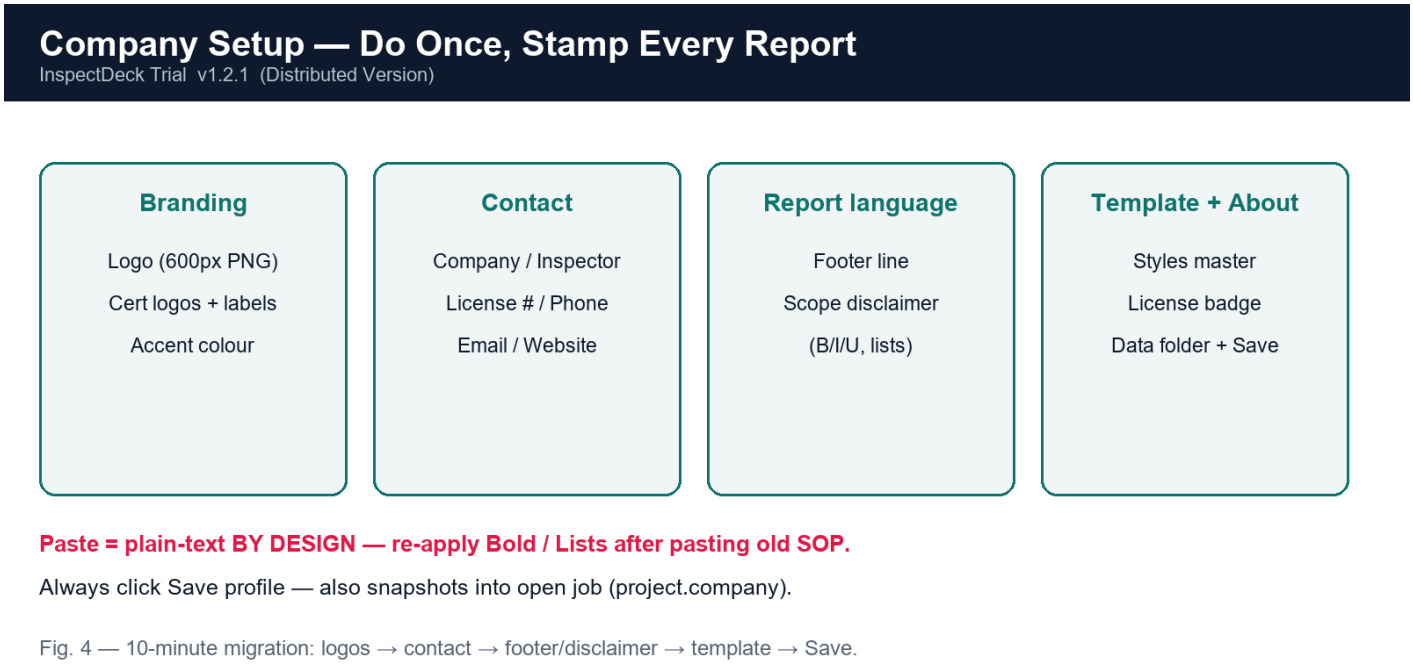


Fig. 4 — 10-minute migration: logos → contact → footer/disclaimer → template → Save.

Bring logos, license #, disclaimer. Save once, stamp every PDF.

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4. Template Map (What to Pick)

Dashboard → Start a new inspection. All sections/spaces renameable/addable/deletable per job.

- **Pre-Sale (13 sections):** your default full inspection. Site → Exterior → Roof & Attic → Structure → Electrical → Plumbing → HVAC → Kitchen → Laundry → Bathrooms → Interior → Garage → Life Safety.
- **1-Year Warranty:** Pre-Sale + **Warranty Punch List** (cosmetic, functional, settlement, callbacks). Use for builder punch.
- **4-Point (5 sections) / Wind Mit (8 sections):** insurance jobs. Clicking either first asks **Standard findings report or Florida official form** — Standard is the template below; Florida fills the state form (standalone with nothing open, or attached to the open job with autofill). Carrier forms vary — attach current carrier version; verify OIR-B1-1802 date.
- **Rental (8 sections):** one **Rental condition report** button, then a popup picks **Move-In** (baseline, meters/keys/photos) vs **Move-Out** (wear-vs-damage). Rental report style pairs here.
- **Serial Lookup tile:** jumps to the Equipment tab — no inspection needed (Ch.10).

File → New Inspection mid-job now shows a real template picker. State on Details is a dropdown (abbreviations); the Florida add-on card appears only when State is FL.

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5. Power Workflow: Findings + Library

Three-column Inspection view: Sections (flags: red dot = safety, orange = repair + counts) | Spaces + Styles + Notes | Findings.

Finding = one defect. Title (required) + Condition status + Priority + Location (prefilled with space, refine it) + Observation + Recommendation + ☑ Include in summary.

Library insert is the speed trick: - Right rail in Add/Edit Finding: search (40 hits max) → click → auto-fills title/comment/action/priority/status + fills `{LOCATION}` (your location/space/section), `{COMPONENT}`, `{TRADE}=qualified contractor`. - Safety/Repair priorities auto-check *Include in summary*. **Edit before delivering** — library is drafting aid, not SOP. - Comments tab: 19 cats, search title/wording/tags, 150/page, New/Edit/Duplicate/Delete, Restore starter set (keeps customs).

Statuses you must map from old tool: Inspected/Satisfactory, Maintenance, Monitor, Repair, Safety concern, Not present, Inaccessible, Not inspected. Priorities drive summary inclusion.

Duplicate Space (⧉) clones structure with fresh IDs, no photos — fastest way to do identical bedrooms/baths.

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6. Styles & Materials — The Feature You Don’t Have Elsewhere

No equivalent in most cloud tools — learn this, it saves callbacks.

Each section has typed attributes (dropdown, multi, yes/no, text, number+unit, date, notes + per-field note). Filled values **print atop that report section**. Example: Electrical Service amperage + Panel brand print above Electrical findings — no duplicate typing.

- Per-job: Inspection → Styles & materials → fill as you go (pill shows filled count + 6-line recap).
- Master: Company → Edit template → categories/fields by section name (aliases). Add fields, extend dropdowns, Reset to defaults.
- **Sync template** pulls new master fields into in-progress job, preserving entries. Old `.inspecx` auto-upgraded on open.

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7. Photos: What Will Surprise You (in a Good Way)

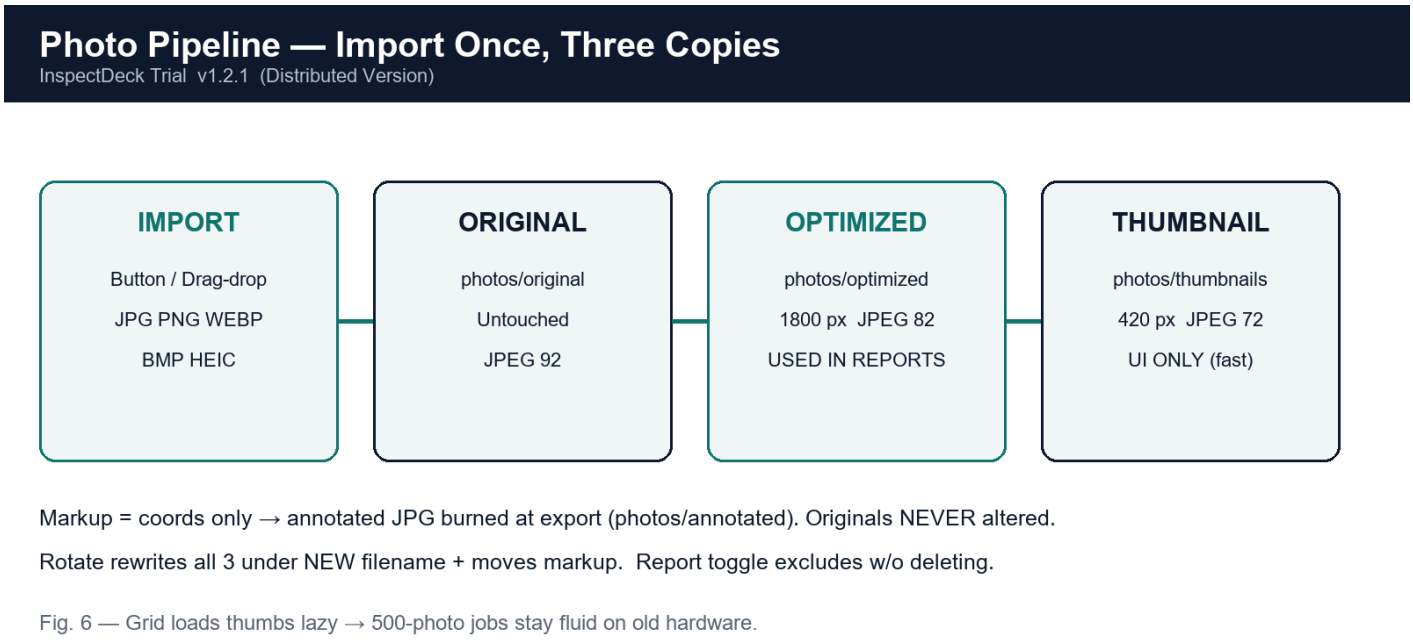


Fig. 6 — Grid loads thumbs lazy → 500-photo jobs stay fluid on old hardware.

Triple-write keeps 500-photo jobs fluid. Thumbs in UI, optimized in PDF, originals untouched.

- Import via button (multi-select JPG/PNG/WEBP/BMP/HEIC), drag-drop onto Photos view *or* finding panel, or Add photos inside finding (auto-attaches).
- Each photo card: caption (prints), Section+Space dropdowns, Mark up, Rotate ↺↻, ★, Report toggle, Delete (removes from findings + files), dimensions line.
- Filters: All / Unassigned / Attached / Marked up / Favorites / Excluded + section filter + count line.
- Import auto-assigns to current section (or `All sections` filter). Finding-attached stamps section/space.
- **Report toggle is per-photo**: exclude ugly duplicates without deleting evidence.

You never wait on full-res loads — grid is 420px thumbs, lazy-loaded.

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8. Markup Without Fear

Click thumb → modal (draft preserved underneath) → Arrow/Box/Circle/Draw/Text, 6 colors, stroke 2–14, Undo/Clear, caption, Rotate ↺↻. Badge *marked up* on save.

Key differences from old tools: - Shapes are normalized coords — **original never altered**, annotated JPG rendered to `photos/annotated/` at export. - Rotate rewrites all three copies under **new filename** (no cache ghosts) and **moves markup with pixels**. - Click thumb *inside finding* to markup without losing typed text; badge refreshes on close.

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9. Florida Forms Without Leaving the App

Dashboard → 4-Point / Wind Mit → **Florida official form**. With nothing open the form stands alone (Save… keeps a reopenable file, Export PDF flattens it, × with unsaved edits asks Save / Don't Save / Cancel). With a job open, choose **Add to current inspection** (autofilled, exports its own PDF, rides in the same `.inspecx`) or start new — and **Import saved…** pulls yesterday's standalone form into today's job. Pane zoom is 50–250% uniform, remembered per form. No print dialog on export.

Form PDF export, the form Print button, and `Ctrl+P` use the same license gate as report export — all require an active license. Always verify OIR-B1-1802 / carrier version date.

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10. Equipment Age Decoder (Serial Lookup)

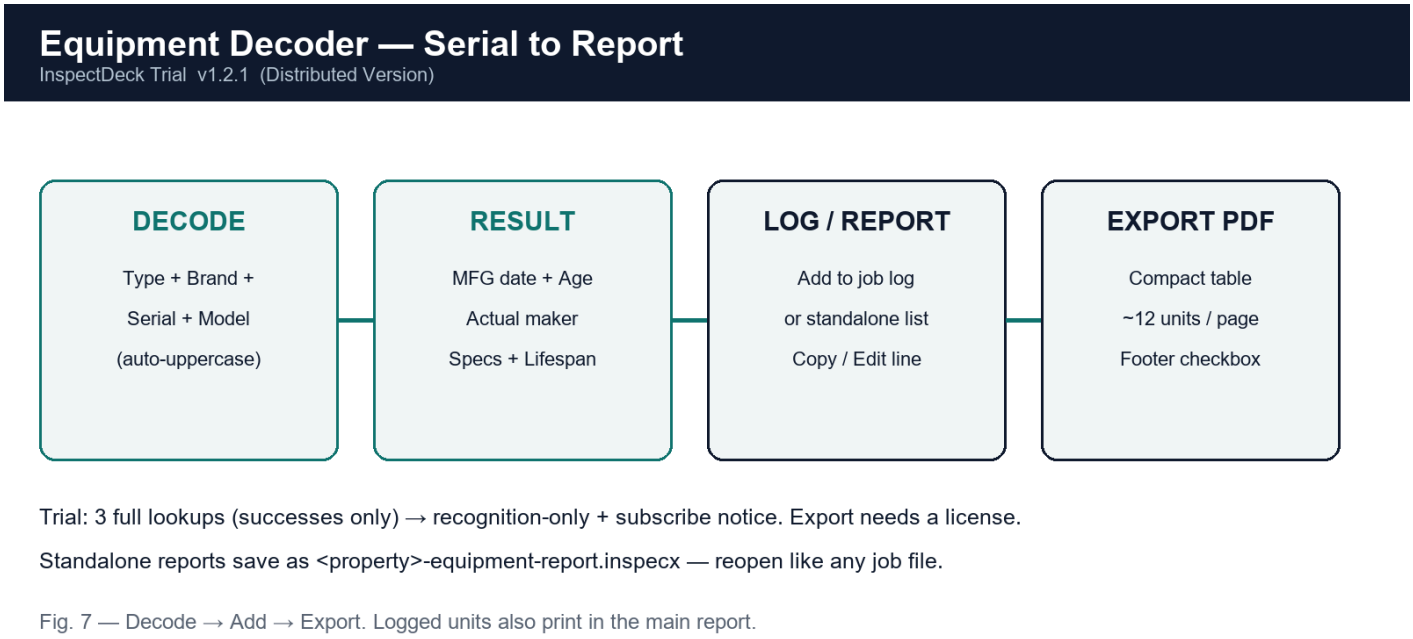


Fig. 7 — Decode → Add → Export. Logged units also print in the main report.

Decode a serial, log it to the job or export a standalone PDF.

Equipment tab, works with no job open: pick type (item choices follow it, incl. **A/C Condenser Unit**) + brand, type serial + model (auto-uppercase), Decode → MFG date, age, actual manufacturer, specs where real, lifespan, confidence. Wrong brand picked? The result names the decoded maker — trust the plate.

- **Job open:** Add to inspection log → prints in the main report's Equipment age log. Copy / Edit / Remove per row.
- **No job:** client header → Add to report per unit → Export equipment PDF (compact, ~12/page, confidence under MFG/Age, footer checkbox) → Save… as `<property>-equipment-report.inspecx`, reopenable like any file.
- **Trial:** 3 full lookups (successes only), then recognition-only + subscribe notice. Export needs a license regardless.

11. Reports: 3 Styles, Zero Cloud

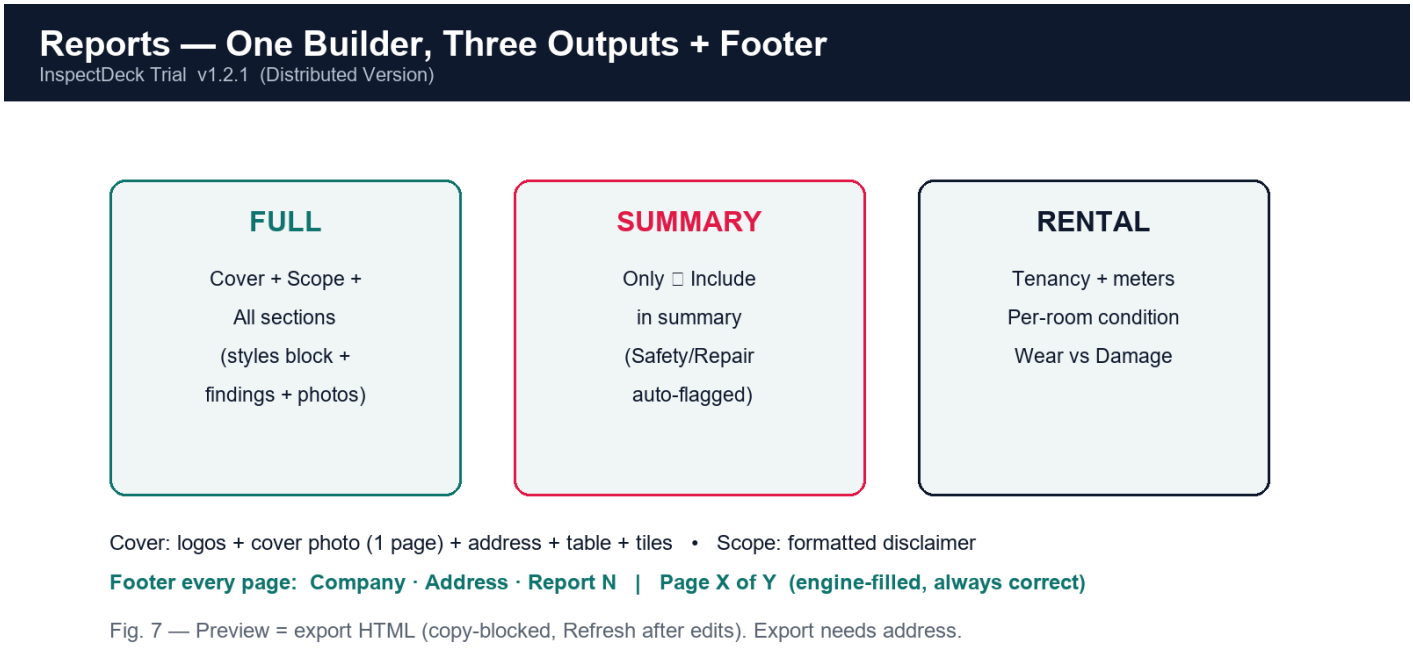


Fig. 7 — Preview = export HTML (copy-blocked, Refresh after edits). Export needs address.

One builder, three outputs. Preview = export HTML (sandboxed, copy-blocked). Export requires an active license.

- **Full:** cover (logos, cover photo capped to keep one-page cover, address 2-line, detail table, count tiles) + scope (formatted disclaimer) + all sections (styles block + findings + captioned photos) + equipment log if units logged + footer (rule + `Company · Address · Report N` + `Page X of Y` engine-filled).
- **Summary:** only *Include in summary* items. Send with Full or standalone for agents.
- **Rental:** tenancy/meters + per-room + wear-vs-damage.

Preview iframe is hardened (no select/copy/drag, `Ctrl+A/C/X/P` blocked) — use Export for printable file. **Refresh preview** after edits. Export needs an address; Save dialog suggests `"Address – inspection report.pdf"`; toast + reveal on done. Top-bar Export / `Ctrl+E` / File menu all use the identical gate. Without a license you'll see an enter-key/buy notice instead.

Cover photo: Dashboard Details card → Choose file or Use inspection photo → landscape front elevation, 1500px max, address auto-shrink beneath.

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12. Files, Transfer & Backup (Forget Sync)

`.inspecx` is a ZIP: `manifest.json` + `inspection.json` + `photos/{original,optimized,thumbnails}`. Single file per job — and the same Open button reopens standalone Florida forms and `<property>-equipment-report.inspecx` equipment files.

- Save `Ctrl+S` / Save As `Ctrl+Shift+S`. First save defaults to `"Address.inspecx"` (sanitized). Dirty `•` = file behind draft.
- Open via button / `Ctrl+O` / Recents (12) / double-click `.inspecx`.
- **Autosave ≠ Save.** Draft streams continuously; crash? Recover last working draft → Save As.
- Move machines: copy `.inspecx` → Open → photos/workspace rebuild. Naming SOP: `YYYY-MM-DD – Address – Client.inspecx` in `Documents\Inspections\`, nightly copy to backup.
- App data holds `company-profile.json`, `comment-library.json`, `styles-template.json`, `recent-projects.json`, `workspaces/`. **Open data folder** in Company → About.

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13. 60-Minute Switch Checklist (Trial)

- [ ] 0:00–0:10 Install Trial + activate + About 1.2.1 (Help → License… shows badge)
- [ ] 0:10–0:20 Company brand (logos, accent, footer, disclaimer reformatted, Save)
- [ ] 0:20–0:25 Start Pre-Sale test job, fill Details + cover
- [ ] 0:25–0:30 Styles: fill Electrical + Roof (confirm recap + Sync)
- [ ] 0:30–0:42 4 findings via library inserts (edited!) + 1 manual; duplicate a bedroom space
- [ ] 0:42–0:48 Import 6 photos, caption, assign, markup 1, attach to a finding; decode 2 serials into the log
- [ ] 0:48–0:57 Preview Full → Export Full + Summary PDFs (licensed), verify footers/photos + equipment log
- [ ] 0:57–1:00 Save As dated `.inspecx`, confirm Recents + reopen

Pass = 2 PDFs correct + `.inspecx` portable. Keep this job as your template reference. Delete and redo once blind — second run should be <30 min.

Appendix — Differences Table & Shortcuts

Where things live: Dashboard (start/details/cover/Florida add-ons) · Inspection (sections/spaces/findings/styles) · Photos (library/markup entry) · Equipment (decoder/log/standalone report) · Comments (bank) · Report (preview/export) · Company (brand/disclaimer/template/license/data).

Shortcuts: `Ctrl+N` New · `Ctrl+O` Open · `Ctrl+S` Save · `Ctrl+Shift+S` Save As · `Ctrl+E` Export · `Ctrl+1..6` tabs · View menu zoom/reload (no devtools) · `Ctrl+P` never prints (license modal in trial).

Gotchas from switchers: Paste strips to plain-text (reformat!) · Preview needs Refresh · Report toggle ≠ Delete · Rotate renames files (relink automatic) · Old `.inspecx` gains Styles on open · Export block has no bypass — activate first · Trial decoder gates after 3 successful lookups · Closing with unsaved work asks Save / Don't Save / Cancel · 14-day offline grace with about-weekly online re-check.

Insurance/legal: 4-point/wind-mit document for underwriting only — attach current official form version; library is drafting aid — review every insert against judgment, agreement, SOP.