InspectDeck Trial — Team Trainer Guide

InspectDeck Professional · Training Guide

InspectDeck Trial — Team Trainer Guide

Distributed Version | Teach Setup → Field Work → Final Report with Consistency | v1.2.1 | SOP + Lesson Plans + Checklists

> **Who this is for:** owners, office managers, and lead inspectors who train others on the distributed **Trial** build (`InspectDeck Trial`). Assumes trainees will also read the Beginner guide — this book is your **teaching script, exercises, assessments, and SOP templates**.
>
> Files: `01-Training-Guide-Beginner.md` (assign as pre-work) · `02-Training-Guide-Experienced.md` (for hires switching tools) · this file (your class plan). Update reference: `_TRIAL-REFERENCE.md` .

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1. Training Outcomes & Prerequisites

By end of class each trainee must independently: install the Trial build and sign in to activate (Windows buyers paste the license key once to link it), configure brand once, start correct template, complete details + cover, record styles, write 6+ findings with 2+ library inserts (edited), import/caption/assign/markup/attach 8+ photos, export Full + Summary PDFs with correct footers, save dated `.inspecx` + recover draft.

Prerequisites (send 48h before): - Laptop: Windows 10/11 x64, 8 GB RAM, 2 GB free, sample SD with 15+ JPGs (house exterior, panel, water heater, roof, kitchen, bath). - Pre-work: read Beginner Modules 0–4, bring company logo PNG + license # + disclaimer draft. - Trainer prep: Trial installer (`InspectDeck-Trial-Setup-1.2.1-x64.exe`), one License key for demo activation, projector, printed checklists (Sec.5), USB with sample `.inspecx` . Confirm internet is available at least for the activation demo (after that, offline grace applies).

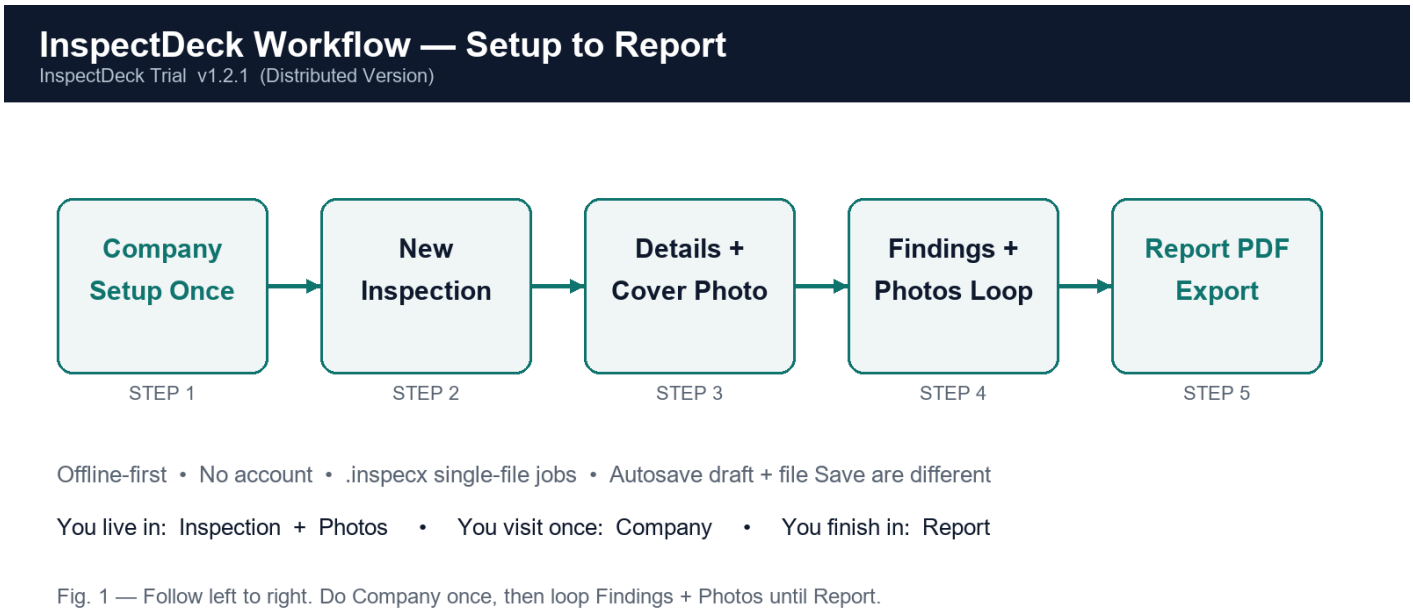


Fig. 1 — Follow left to right. Do Company once, then loop Findings + Photos until Report.

Teach left-to-right: Setup once → Details → Findings+Photos loop → Report. Don't teach Report before Findings.

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2. 4-Hour Class Agenda (Copy-Paste Schedule)

Time	Block	Format	Materials
0:00–0:20	**Setup, Trial & Activation** (Modules 1–2)	Demo + install together	Trial installer, About screen, License modal
0:20–0:50	**Company Setup Sprint** (Module 4)	Guided lab	Logo files, disclaimer drafts

Time	Block	Format	Materials
0:50–1:10	**Templates + Details + Cover** (Modules 5–6)	Demo + Exercise 1	Beginner guide
1:10–1:40	**Findings + Library** (Modules 8–9)	Demo + Exercise 2	Library search list
1:40–1:55	*Break*	—	—
1:55–2:25	**Styles & Materials** (Module 7)	Demo + Exercise 3	Master template printout
2:25–3:00	**Photos + Markup + Attach** (Modules 10–12)	Lab + Exercise 4	SD cards, Fig.6
3:00–3:15	**Florida Forms** (Module 13, FL teams; else QA)	Demo + Exercise 5	OIR-B1-1802 version
3:15–3:35	**Reports + Files** (Modules 15–16)	Demo + Exercise 6	Fig.8, naming SOP
3:35–3:50	**Equipment Decoder** (Module 14)	Demo + Exercise 7	Sample serials, Fig. 7
3:50–4:00	**Assessment + Sign-off**	Individual check + rubric	Sec.5 + Sec.8

> Remote? Share screen for demos, trainees mirror locally. Mute during labs, spot-check via screen share. Offline works after activation — pre-download the Trial installer.

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3. Lesson Scripts (What to Say + Demo)

Lesson A — Setup, Trial & Activation (20 min)

Say: *"InspectDeck Trial is offline. No login. Without a license, Export and Print are blocked in the main process — not just a hidden button — so activation matters. You keep this same install and unlock it in place with your key; there is no reinstall."* **Demo:** Run Trial installer → SmartScreen More info → Run anyway → folder + shortcuts. Help → About (1.2.1) → License modal (days remaining) → Buy link → paste demo key → badge on Company License card. Explain the 3-day clock (reinstalling doesn't reset it), the 3-lookup equipment

allowance, about-weekly re-checks, and 14-day offline grace. Alternative opener: Help → Watch Overview Video… (4 min, narrated) instead of the live install demo; the written guides live under Help → Training Guides.

Lesson B — Company Setup (30 min)

Say: *"Do this once right or every report is wrong. Logos, accent, footer, disclaimer, styles master — then Save profile. Check the License card on the same screen."* **Demo:** Upload logo (transparent PNG), add 2 cert logos, reorder, toggle labels. Set accent. Paste disclaimer → show plain-text strip → re-apply Bold + list. Edit Styles template → add field → Reset demo. Save profile → show Welcome bar update. **Watch for:** trainees forgetting Save profile; white-box logos; pasted Word formatting (must reformat).

Lesson C — Templates + Details (20 min)

Say: *"Pick template by job, not habit. Pre-Sale default; Warranty adds punch list; 4-Point/Wind ask Standard or Florida form; Rentals share one button, then pick move-in or move-out."* **Demo:** Start Pre-Sale → stat tiles → fill Property/Client (State is a dropdown) → Florida add-on card appears only when State is FL → rental card only on move templates → summary note → cover Choose file vs Use inspection photo (landscape, 1500px, address auto-shrink).

Lesson D — Findings + Library (30 min)

Say: *"One finding, one defect. Insert from library, then edit — never ship raw inserts. Placeholders fill from your location."* **Demo:** Add Safety GFCI → Insert library → show `{LOCATION}` fill → edit narrative → check Include in summary → save. Duplicate space for Bedroom 2. Show section dots + counts. Stress legal: review every insert vs SOP/agreement.

Lesson E — Styles & Materials (30 min)

Say: *"This prints atop each report section. Fill in field, not in notes — or it won't print where client looks."* **Demo:** Electrical styles → fill amperage/panel → recap + pill → Sync template after master add → open old file to show auto-upgrade.

Lesson F — Photos + Markup (35 min)

Say: *"Import once, three copies. Thumbs keep you fast. Markup never touches originals; rotate moves markup."*

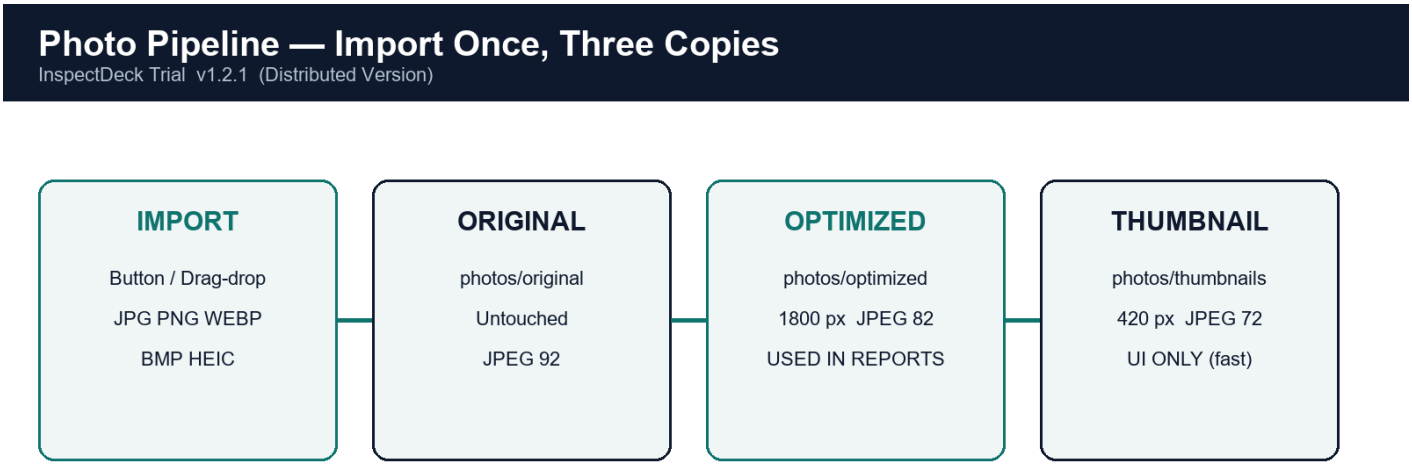


Fig. 6 — Grid loads thumbs lazy → 500-photo jobs stay fluid on old hardware.

Demo: Import 5 (show failed list) → caption → assign section/space → filter → Favorite/Exclude → markup arrow+text → badge → rotate → attach 2 to finding via panel + Choose grid (unattached first) → drag-drop.

Lesson G — Florida Forms (15 min, FL teams)

Demo: Dashboard → 4-Point → Florida official form (standalone, no job behind it) → zoom 150% → fill → Save… → close → reopen via Open → attach into a job via Import saved… on the Florida add-on card (State must be FL) → Export Save-as flattened PDF → verify. Requires an active license for PDF/print. Stress: verify OIR-B1-1802 / carrier version date every job; the × close guard (Save / Don't Save / Cancel) protects standalone work.

Lesson H — Equipment Decoder (15 min)

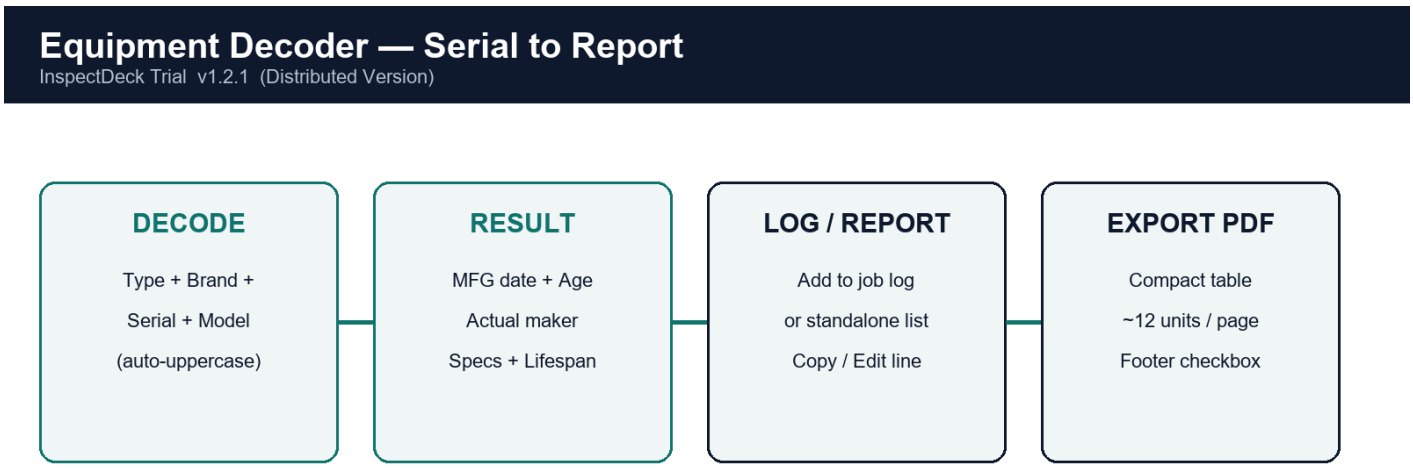


Fig. 7 — Decode → Add → Export. Logged units also print in the main report.

Say: *"Serial gives you the birthday, model gives you the size. Log it once, it prints in every report."* **Demo:** Equipment tab → type + brand + serial `1605123456` + model `GSX140241` (auto-uppercase) → Decode → actual manufacturer + May 2016 + ~2-ton → Copy report line → Add to inspection log → Edit a row (item type + location) → standalone: client header → Add to report → Export equipment PDF → Save… (`<property>-equipment-report.inspecx`). Note the trial 3-lookup allowance + gated card, and the footer checkbox.

Lesson I — Reports + Files (20 min)

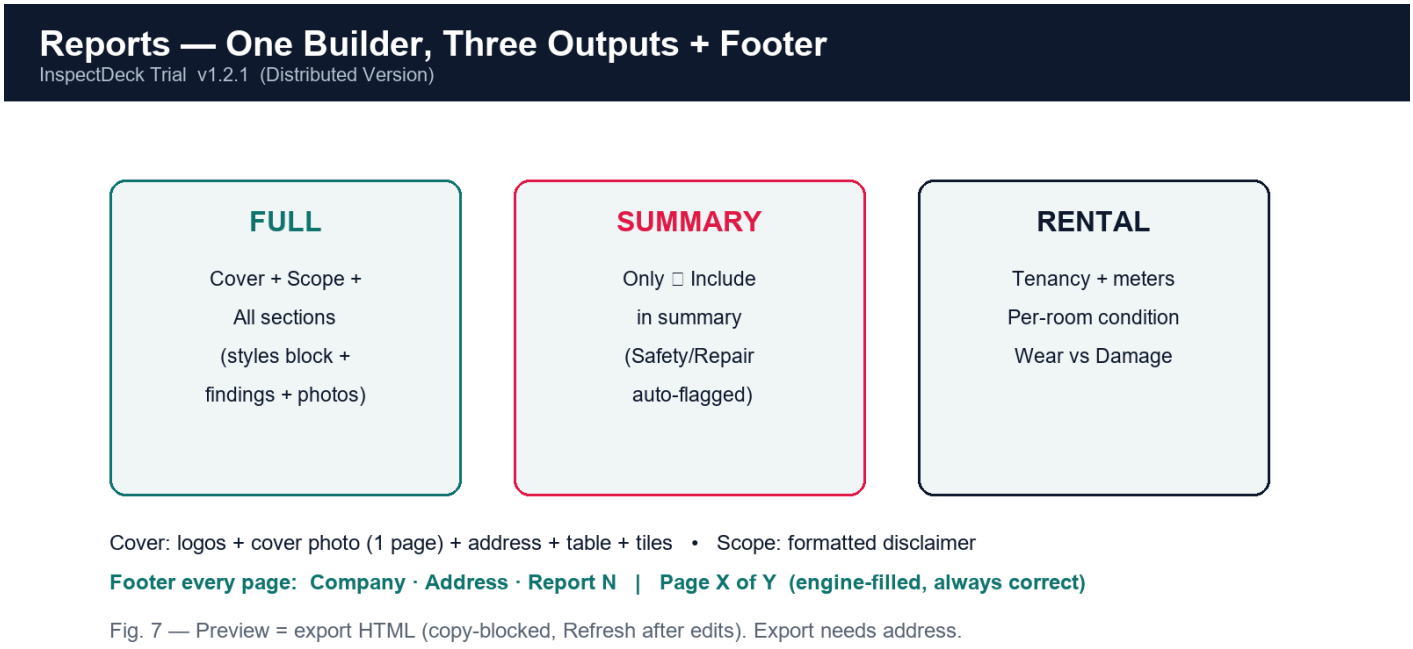


Fig. 7 — Preview = export HTML (copy-blocked, Refresh after edits). Export needs address.

Say: *"Preview equals export HTML but copy-blocked. Refresh after edits. Address required, and Export requires an active license. Footer page numbers are engine-filled — always correct."* **Demo:** Full vs Summary vs Rental → Refresh → Export both (licensed) → open → cover (logos/photo/address/table/tiles one page), scope, styles block, captioned photos, footer. Save As dated `.inspecx` → Recents → double-click open → Recover draft demo → backup SOP.

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4. Hands-On Exercises with Answer Keys

Exercise 1 — Details + Cover (10 min)

Task: New Pre-Sale → 1234 Palm Grove Blvd, client Jane Doe, fee $450, clear/78°F → cover from file → 2-sentence summary note. *Key:* All fields filled, cover preview shows, stat tiles 0/0, dirty `•` visible before Save.

Exercise 2 — Findings Sprint (15 min)

Task: 3 findings: Safety GFCI (library insert + edited location *"Kitchen north wall"* + Include), Repair plumbing leak (manual), Maintenance HVAC filter. Duplicate Bedroom space. *Key:* 3 cards, badges red/orange/amber, library text edited (not verbatim), duplicate has fresh IDs no photos, section dots correct.

Exercise 3 — Styles (10 min)

Task: Electrical: Service 200A + Panel Square D; Roof: Covering Architectural shingle + Age 2019. Sync after trainer adds master field. *Key:* Recap lines visible, pill counts 2+2, new field appears after Sync with old values kept.

Exercise 4 — Photos (15 min)

Task: Import 8, caption all, assign 4 Electrical / 4 Roof, markup 2 (arrow+text), attach 2 to Safety finding, exclude 1, favorite 1. Filter checks. *Key:* `N of M` counts match, *marked up* ×2, Photos (2) on finding, Excluded hidden from report count, Favorite filter =1.

Exercise 5 — Florida (FL, 10 min, licensed)

Task: Open the Wind Mit form standalone → 150% zoom → fill 3 fields → Save… → close → reopen via Open → Import saved… into the practice job → Export flattened PDF → confirm opens. *Key:* Round-trips through Save/Open intact; PDF non-editable (flattened); version noted. Trial print/Ctrl+P stays blocked.

Exercise 6 — Report + File (10 min, licensed)

Task: Refresh Full → Export Full + Summary → verify cover/footers/photos + equipment log → Save As `YYYY-MM-DD – Address – TraineeName.inspecx` → reopen via Recents. *Key:* Both PDFs open, `Page X of Y` correct, cover one page, `.inspecx` reopens with photos intact.

Exercise 7 — Equipment (10 min)

Task: Decode 2 serials (one HVAC with model, one appliance) → Copy a report line → Add both to the inspection log → Edit one row's location → standalone: header + Add to report + Export equipment PDF (toggle footer off and compare). *Key:* Actual manufacturers shown; appliance row carries no size/specs; PDF has confidence lines + fine-print limitations; `<property>-equipment-report.inspecx` saves and reopens.

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5. Competency Checklists (Sign-Off Sheets)

Print one per trainee. Trainer initials each line. No sign-off = no solo jobs.

Setup & Company (Trial): - [ ] Installs Trial without help (SmartScreen + `InspectDeck Trial` title verified) - [ ] States 3-day trial limits + activation steps (sign in with email code; Windows buyers paste the key once to link it) - [ ] Logo + cert logos ordered/labeled + accent set + Save profile - [ ] Disclaimer reformatted (not raw paste) + footer written + License badge checked

Inspection: - [ ] Picks correct template for 3 scenarios (pre-sale / 4-point-Florida / rental move-out → move-out popup) - [ ] Completes Details + State dropdown + rental meters when applicable + cover photo - [ ] Explains the Florida add-on card (FL only) + Import saved… flow - [ ] Fills Styles for 2 sections + explains Sync

vs master - [ ] Writes 6 findings across statuses, 2 via edited library inserts, summary flags correct - [ ] Decodes 2 serials into the log, edits one row, states the trial 3-lookup allowance

Photos: - [ ] Imports via button + drag-drop, explains 3-copy pipeline - [ ] Captions + assigns all, uses filters, Favorite/Exclude correctly - [ ] Markups with arrow+text, rotates without losing markup, attaches to findings both ways

Report & Files: - [ ] Previews Full/Summary/Rental, Refreshes, exports both PDFs (licensed), verifies footers/cover + equipment log - [ ] Saves dated `.inspecx`, reopens via Recents + double-click, recovers draft, demonstrates the × close guard - [ ] (FL) Exports flattened form PDF + states version-check rule + round-trips a standalone save - [ ] (Equipment) Exports standalone equipment PDF with footer on/off - [ ] Recites legal: library = drafting aid, official forms control, SOP governs

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6. Company SOP Templates (Adopt as Policy)

Copy into your ops manual. Bracketed items to customize.

SOP-01 File naming & storage: `YYYY-MM-DD – <Street Address> – <ClientLastName>.inspecx` in `Documents\Inspections\[Year]\`. Nightly copy to `[backup drive/cloud]`. Never rename inside ZIP. Keep workspace until `.inspecx` verified.

SOP-02 Report delivery: Export Full + Summary for every pre-sale/warranty (licensed installs only); Rental style for move-in/out; flattened Florida PDF + carrier/state form version noted in file. Verify cover (logos/photo/address), scope version `[date]`, footers numbered, ≥1 photo per major defect with caption + markup where location unclear. Deliver PDFs, archive `.inspecx` `[retention years]`.

SOP-03 Photo minimums: ≥1 front elevation (cover) + ≥1 per system + ≥2 per Safety/Repair finding (wide + close-up marked). Caption every report photo. Exclude, don't delete, duplicates. Favorite cover candidate.

SOP-04 Wording: Library inserts must be edited to observed condition + location; Safety/Repair must have Recommendation with trade (*"qualified licensed [trade]"*); *Include in summary* checked for all Safety + client-facing Repair. Lead reviews Summary before send for first 10 jobs.

SOP-05 Styles: Fill applicable Styles fields on site (not office); Sync template weekly; never type material data only in notes.

SOP-06 Florida: Verify OIR-B1-1802 / carrier form version on inspection date, record version in Attachments section + filename, attach official PDF alongside InspectDeck report. Standalone forms save as `.inspecx` holders; use Import saved… to join them to a later full inspection.

SOP-07 Licensing (Trial fleet): One subscription = one inspector = up to two authorized installations total (any mix of Windows/Android/iOS) under one free account — never buy a second subscription for a second machine. Sign in on each machine; Windows keys are pasted once to link, then sign-in alone suffices. Confirm the Account badge on Company screen before first paid job; keep one-time internet available for sign-in; plan field work within 14-day offline grace and reconnect about weekly for re-checks. Removing a device (with confirm) frees its slot immediately; the removed install keeps working only until its cached access expires. Trial decoder allowance is 3 successful lookups per install — spend them on real unknowns, not demos. Leave update auto-check on unless machines are air-gapped; skipped versions are per-machine, so confirm the fleet's version from Help → About (last-check line) during audits.

SOP-08 Equipment: Decode every data plate on site (serial + model + photo of plate); log into the job the same day so ages freeze at inspection date; verify the actual manufacturer shown; standalone client reports save as `<property>-equipment-report.inspecx` and export with footer per office policy.

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7. Common Trainee Mistakes & Corrections

Mistake	Why it hurts	Correction drill
Tries to export before activating	Export/Print are gated — nothing exports	Walk Settings → Account → sign in (paste key once if never linked), then retry export
Burns trial decodes on typos	Only successes count — typos are free	Re-type carefully; the counter sits under Decode
Tries form Print / `Ctrl+P` in trial	Print is locked like export	Activate, then use Export PDF
Closes with × and panics	Save / Don't Save / Cancel appears	Pick Cancel to return; save when sure
Forgets Save profile	Reports ship with old brand	Make them change accent → Preview → revert → Save → Preview again
Bundles 5 defects in 1 finding	Summary counts + grouping break	Split drill: rewrite one mega-finding into 3 cards
Ships raw library text with `{LOCATION}` unfilled	Looks templated, wrong location	Require location refinement + one sentence of observed detail per insert
Types materials in Section notes	Doesn't print in styles block	Move 3 notes into Styles fields, compare PDFs
Deletes instead of Excludes photos	Loses evidence	Restore from backup, practice Exclude toggle + filter

Mistake	Why it hurts	Correction drill
Never Refreshes preview	Client sees stale report	Edit finding → Preview (stale) → Refresh → diff
Pastes Word disclaimer raw	Loses formatting, looks unprofessional	Paste → Clear → re-apply Bold/Lists live
Skips cover photo	Cover looks empty, address unanchored	Add landscape cover, compare one-page covers
Ignores version on FL forms	Rejected by carrier/state	Quiz: *"What version today? Where recorded?"* every class

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8. Grading the Practice Report (Rubric)

100 pts. 80 to pass. Grade blind (no trainee name on PDF). Use a licensed install so exports are available.

- Cover & branding (15): logos crisp + ordered, accent consistent, cover photo landscape + address 2-line correct, detail table + tiles on one page.
- Details & summary (10): all Property/Client filled, State dropdown correct, rental meters if applicable, summary note 2+ sentences, no lorem.
- Styles (15): ≥2 sections filled, values specific (amperage, brand, dates), recap matches PDF styles block.
- Findings (20): ≥6 across ≥4 statuses, titles specific, locations precise, observations show seen condition (not generic), recommendations name trade, summary flags correct.
- Equipment (10): ≥2 decoded units logged, actual manufacturers correct, appliance rows carry no specs, locations noted.
- Photos (15): ≥8 captioned + assigned, 2 marked up (arrow+text legible), attached to correct findings, excluded handled, no sideways images.
- PDF mechanics (15): Full + Summary exported from licensed Trial, footers `Page X of Y` correct, scope current, equipment log present, photos optimized (not pixelated), filenames dated.

Feedback script: 2 strengths → 1 critical fix → 1 polish. Return with checklist marked. Re-test failures on Exercises 6–7 only.

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9. Ongoing QA & Field Readiness

- **First 10 solo jobs:** lead reviews Summary + 3 random findings + photo captions before send. Log issues per trainee.

- **Monthly:** Company → Styles template review (new materials?), library audit (top 10 inserts — still accurate?), disclaimer/SOP version check, backup restore test (open random `.inspecx` on second machine), subscription status check (Account badge current, device list has only machines still in service).
- **Field readiness kit:** laptop charged + Trial installer USB + SD reader + `.inspecx` naming card + meter/keys form (rental) + activation note (one-time internet to activate, then ~weekly reconnects, 14-day offline grace).
- **Refresher (30 min quarterly):** one Florida version quiz + one markup speed drill + one restore-draft drill.

Appendix — Print Pack: Attendance, Naming, Legal

Attendance log: Date __ **Trainer** _ ***Trainees (print/sign)*** ___ Sign-off Y/N _____

Naming card (wallet-size): `YYYY-MM-DD – Street – Client.inspecx` · Cover = landscape front · Caption every photo · Refresh preview · Export Full+Summary (licensed) · Backup nightly.

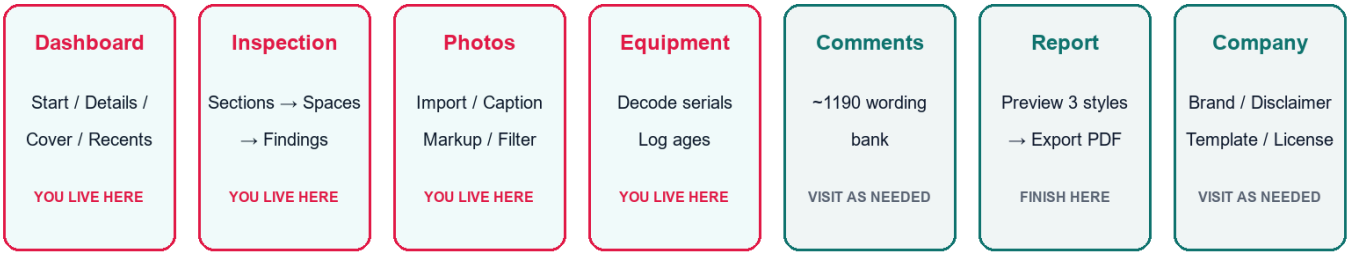
Shortcuts poster: `Ctrl+N` New · `Ctrl+O` Open · `Ctrl+S` Save · `Ctrl+Shift+S` Save As · `Ctrl+E` Export · `Ctrl+1..6` Tabs · No DevTools · `Ctrl+P` never prints.

Activation card: Trial = 3 days → sign in (email code; Windows buyers paste the key once to link) → Account badge on Company screen → reconnect about weekly, 14-day offline grace. Equipment decoder = 3 successful lookups, then subscribe notice.

Legal (read aloud Day 1): *"Four-point and wind-mitigation workflows document findings for underwriting; they do not replace the official carrier or state form. Florida's OIR-B1-1802 and carrier four-point forms change — attach the version in effect on the inspection date. The comment library is a drafting aid, not a substitute for judgment, your agreement, or state Standards of Practice. Review every insert before delivery."*

The 7 Tabs — Where Everything Lives

InspectDeck Trial v1.2.1 (Distributed Version)



Top bar: Brand (logo + property + • unsaved) | Nav (Ctrl+1..6) | Open Save Export PDF

File menu: New Ctrl+N · Open Ctrl+O · Save Ctrl+S · Save As Ctrl+Shift+S · Export Ctrl+E

Fig. 3 — Live in Inspection + Photos + Equipment. Company once. Report last.

End of Trainer Guide (Trial distributed version) — print Sec.5 per trainee, adopt Sec.6 as policy, file graded reports with sign-offs. Future updates: see `_TRIAL-REFERENCE.md` playbook.
