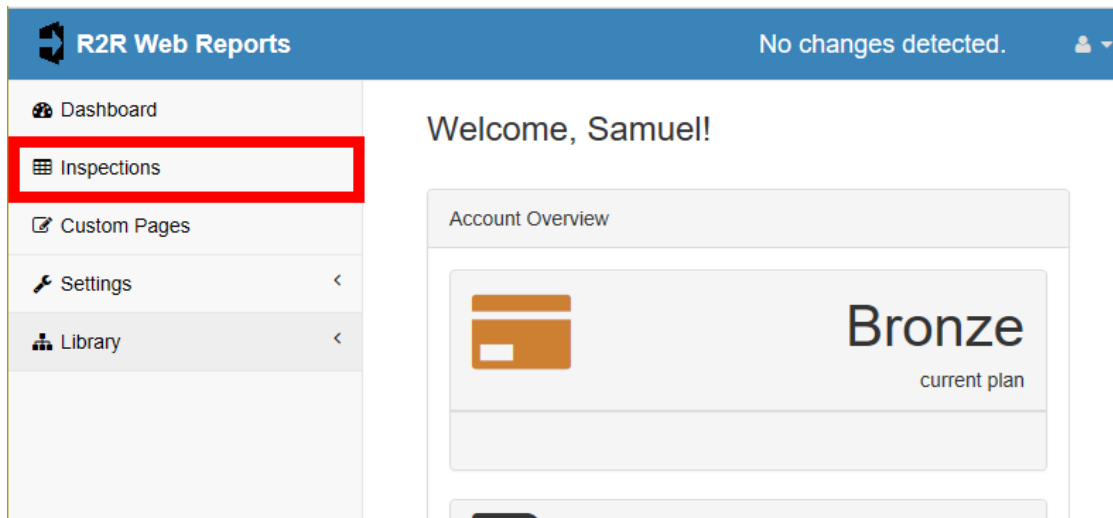


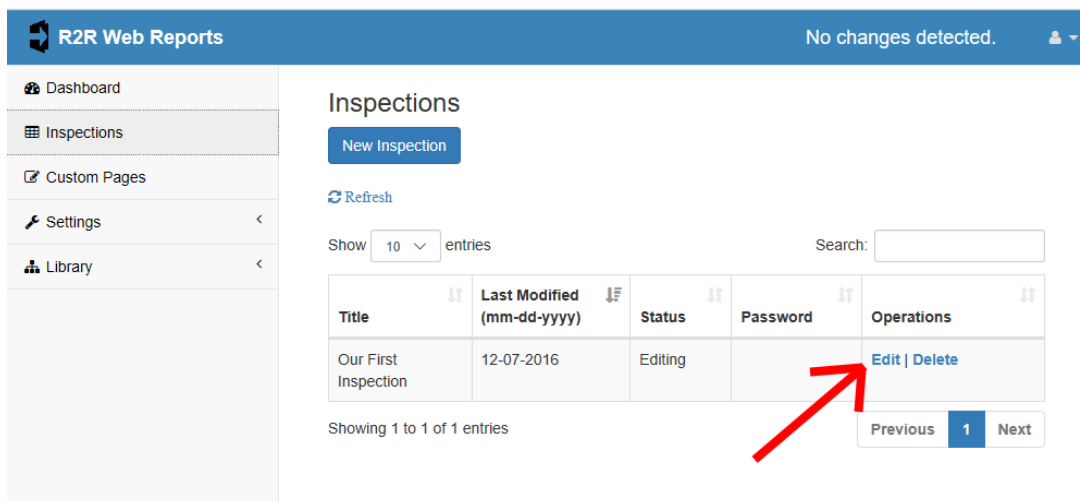
Tutorial 2: Putting the Final Touches on Your Report

This tutorial is a continuation of Tutorial 1: Using RoomToRoom Mobile. We'll be walking through the steps to edit your uploaded report and ultimately publish your final report.

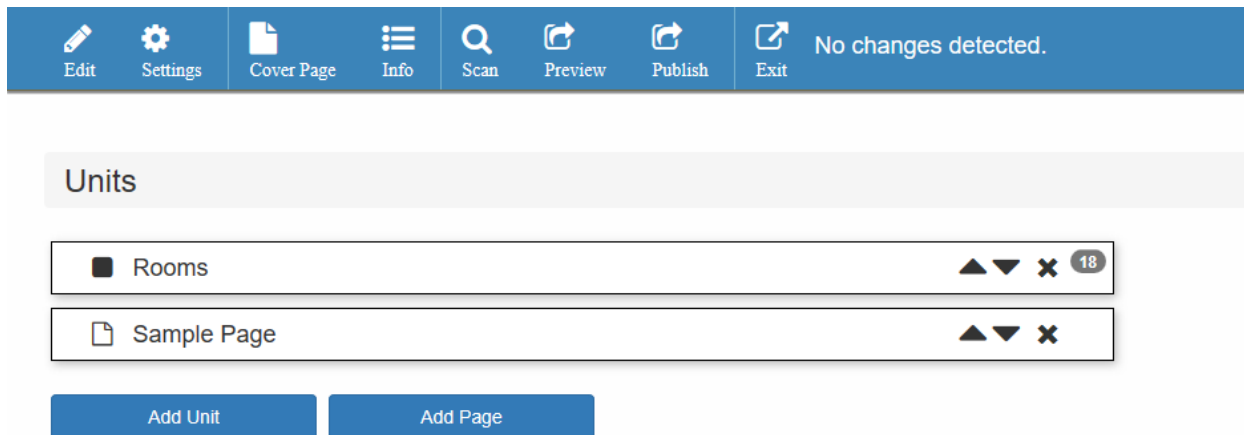
To start off, go to www.r2rwebreports.com and log in. On your dashboard, click inspections:



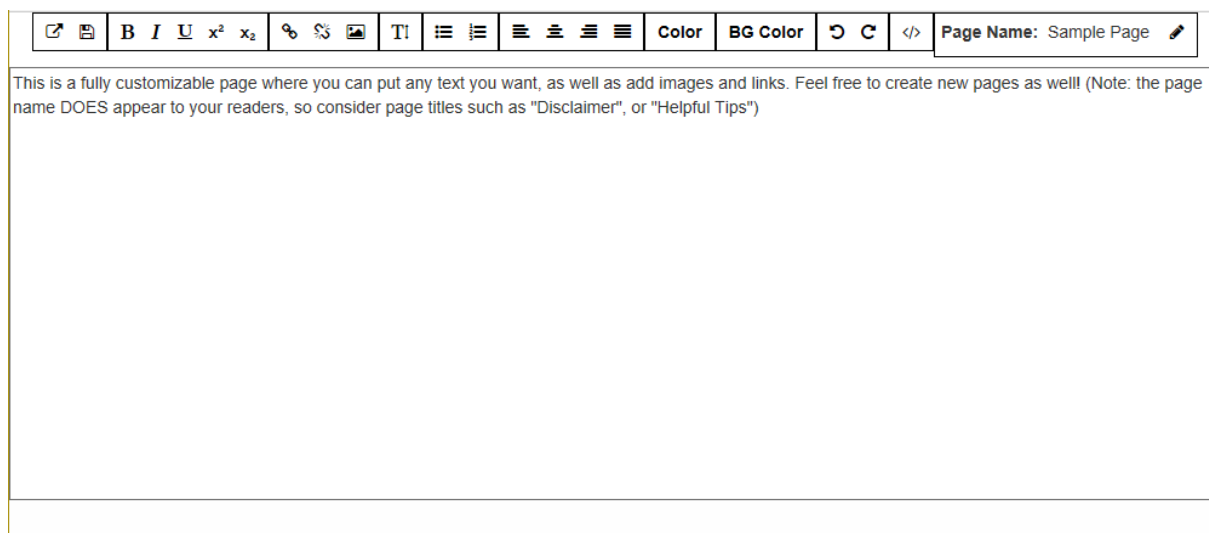
Here you will see the inspection we uploaded. Click "Edit":



This will open the edit page for “Our First Inspection”. Note that you should never open more than one window or tab when editing an inspection as this can cause data loss. Just use one window to edit the inspection.

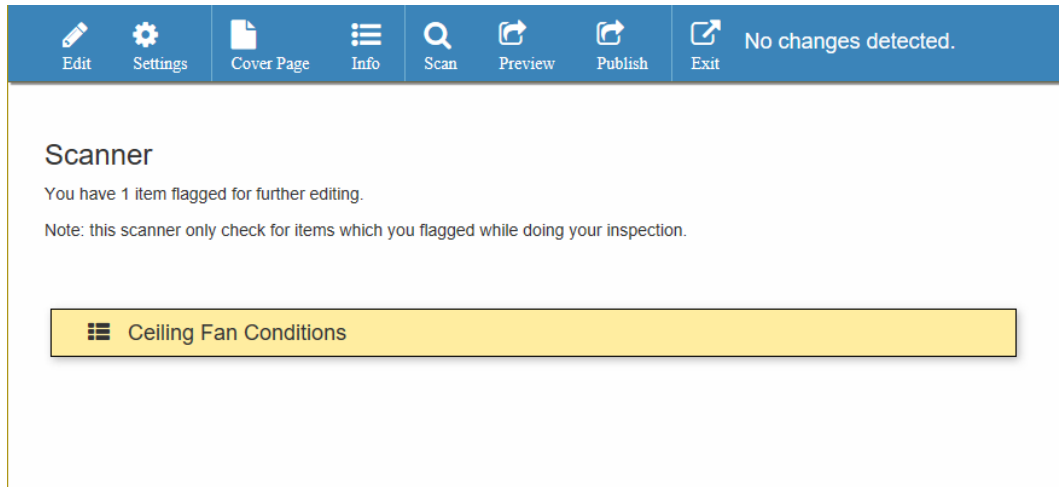


The page looks very similar to RoomToRoom Mobile. You’re looking at the exact same inspection that you uploaded in tutorial 1. The difference here is that you have access to advanced editing capabilities. For example, if you click on “Sample Page” you can edit that custom page:

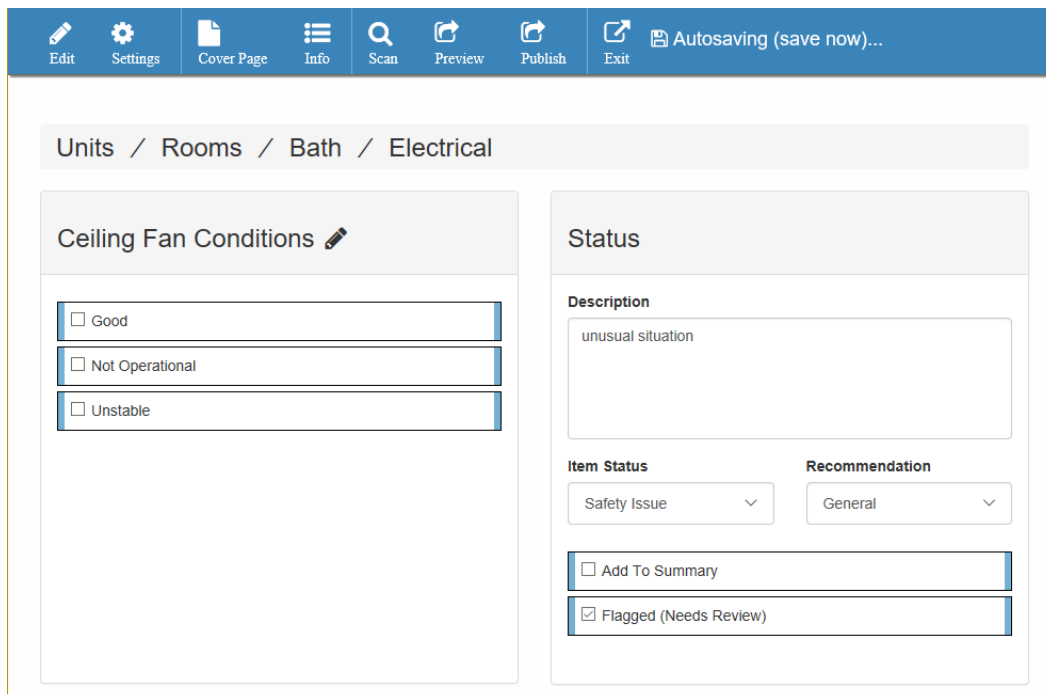


Note that any changes made to this custom page only affect the page in this report. If you want to edit this page so that any changes will automatically appear in all **future** inspections, you’ll need to edit the version of “Sample Page” on the dashboard. We’ll go over this more in another tutorial. If you opened “Sample Page”, click the icon in the top-left to close it.

You'll also notice that there is a "Scan" button in the menu at the top. Click on this to scan your report for any flagged items:



This is the item which we flagged when using RoomToRoom Mobile in Tutorial 1. Click on "Ceiling Fan Conditions" to jump to that item in the report. We entered "unusual situation" in the description box because we had encountered an odd situation which didn't fit any comment in our library:

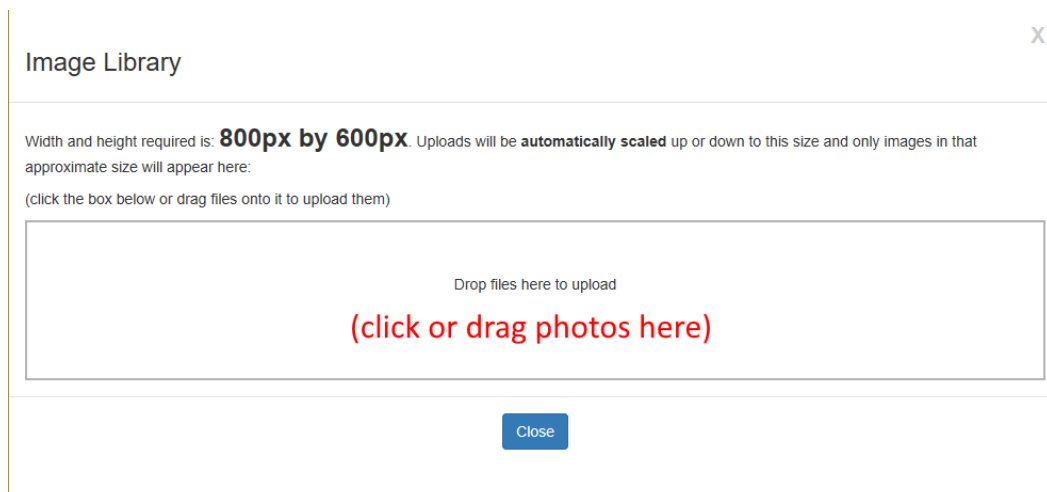


At this point in a real inspection, you would work on typing your custom description in the description box to make it presentable for the client's eyes. Once complete, make sure to unflag the item or it will continue to show up in the scanner.

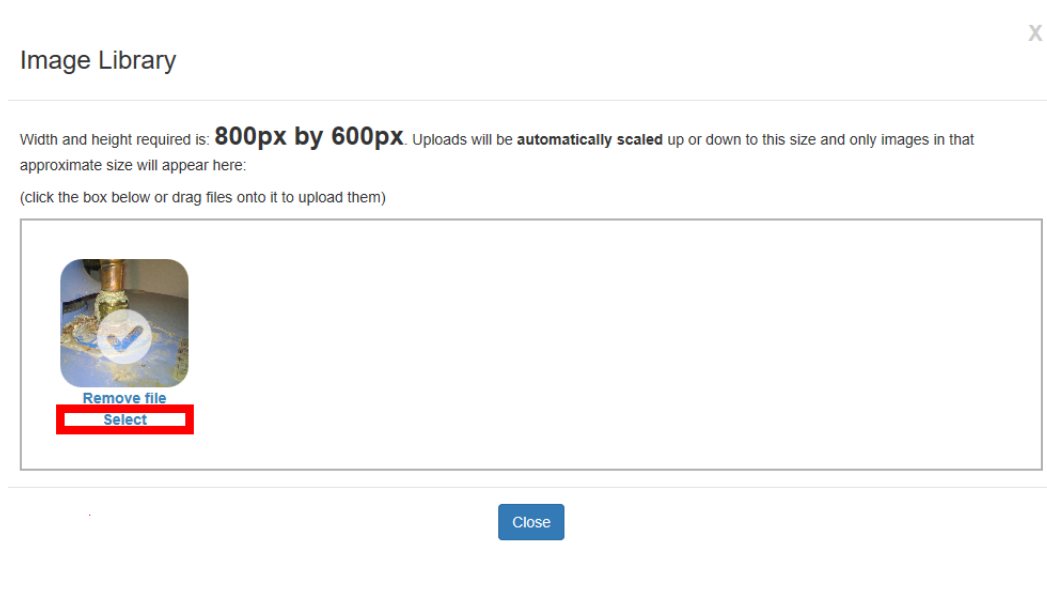
Another important feature to look at is the image uploader. While RoomToRoom Mobile automatically inserts photos into whatever part of the inspection you are working on, sometimes inspectors use an external camera to take higher quality pictures and need to upload and insert the photos after the inspection. To do this, scroll down to the bottom of the page and you will see the image upload button:

The screenshot displays the inspection interface. On the left, there are two checkboxes: Not Operational and Unstable. On the right, there are two dropdown menus: **Item Status** set to 'Safety Issue' and **Recommendation** set to 'General'. Below these are two more checkboxes: Add To Summary and Flagged (Needs Review). At the bottom, there is a 'Photos' section with a red box highlighting the upload icon (a camera with an arrow pointing up).

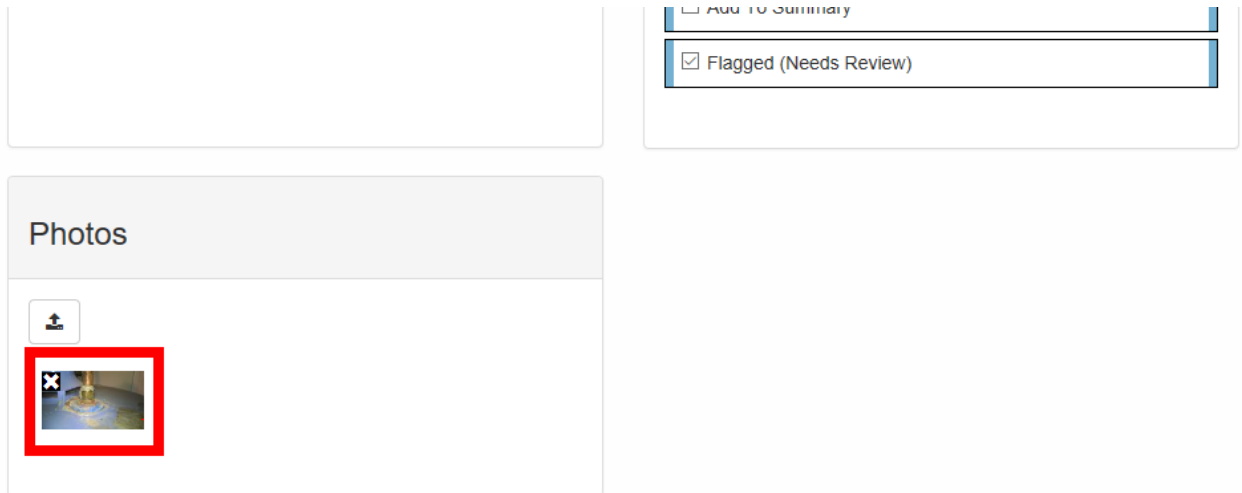
Clicking that button will open your image library. Note that the image library is specific to this inspection and does not contain images found in any of your other inspections:



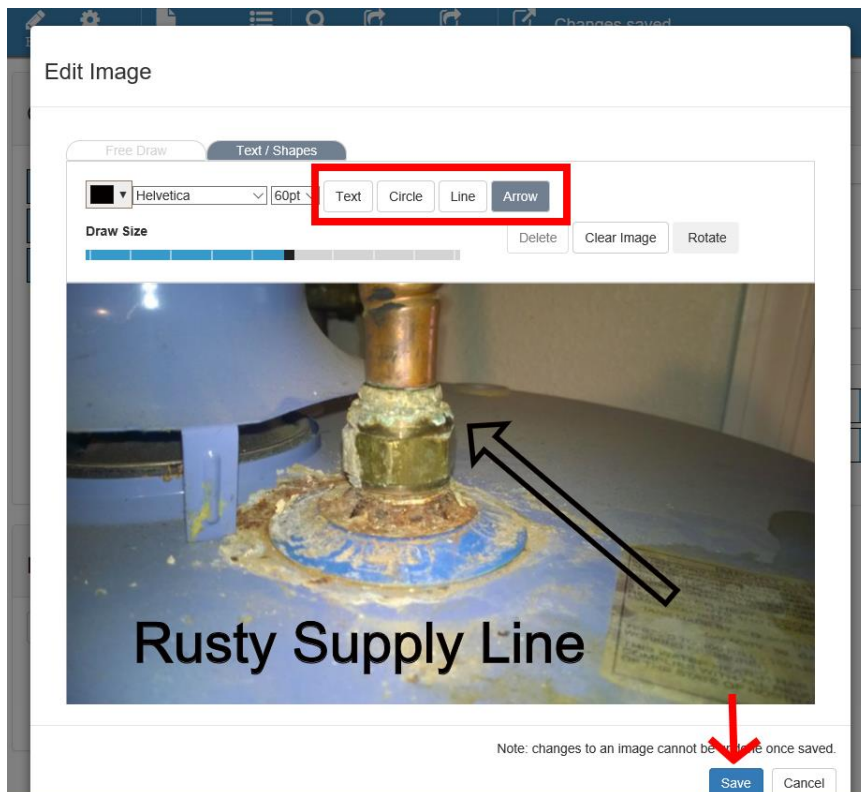
You can drag photos from a folder on your computer onto the box to upload them, or just click on the box to open a file selection window. In my case, I've uploaded a totally irrelevant photo of a rusty water heater supply pipe. Once the photo is uploaded, click "Select" underneath the photo:



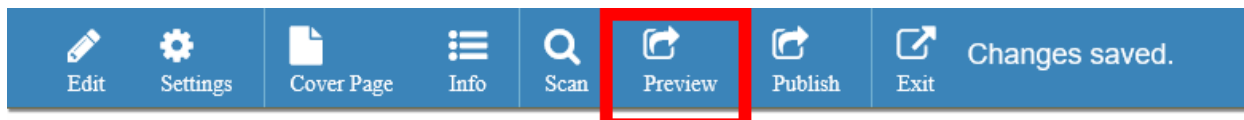
Back in the report, you'll see that the image has been added. Click on it to open the editor:



You can now add different shapes and text, and change the color and size of elements to make the defects in the picture really easy to spot. If you are placing an object like a circle or a text box, click “Circle” or “Text” and then just click anywhere on the picture to add one. If you are placing an arrow or a line, select “Arrow” or “Line” and then click and drag on the photo to create it. Make sure to click “Save” once done:

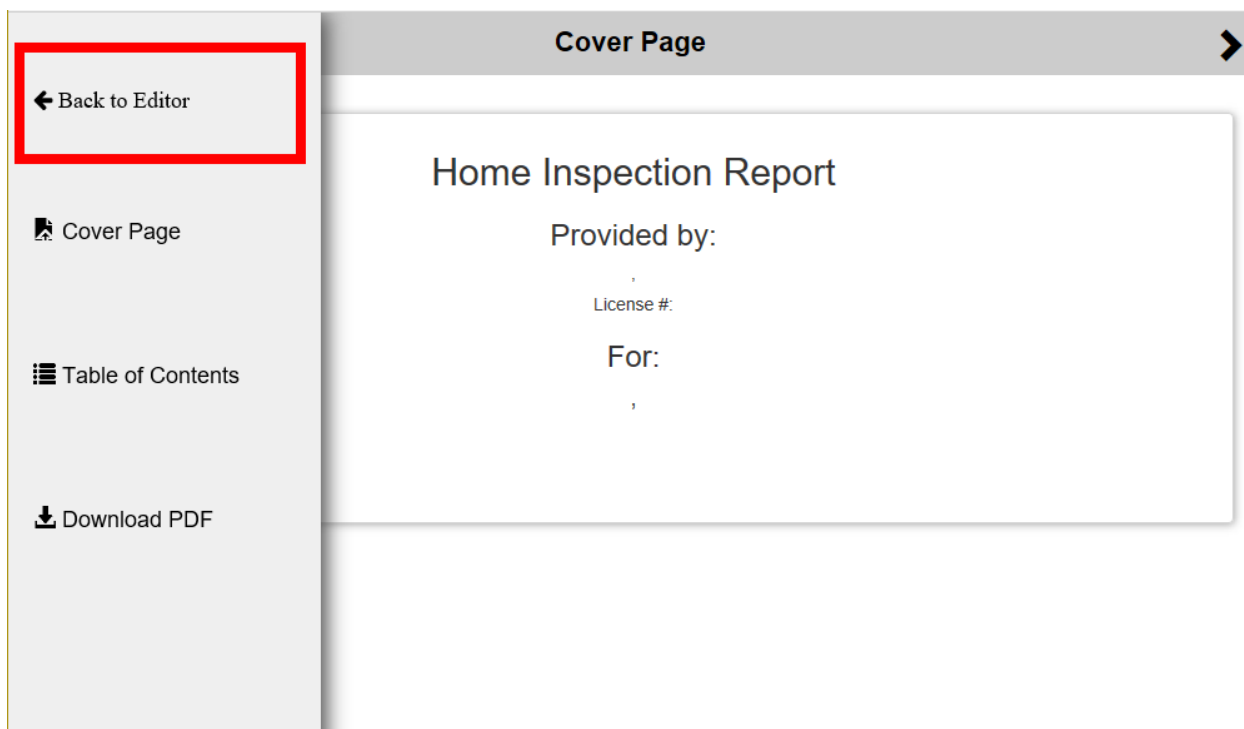


Back in the inspection, let's go ahead and click "Preview":



Units / Rooms / Bath / Electrical

This opens a preview of what the reader will see. You'll notice that we haven't yet added any cover page content. Clicking the button in the top left will open the menu:



From this menu, you can go to the PDF download page to access a traditional PDF version of the report (a preview, since we haven't published this report yet), as well as the table of contents and cover page.

Click “Back to Editor” at the top.

Let’s make our report look a little nicer. Click “Cover Page” from the top menu once the editor loads again:



Edit Cover Pages

Cover Page Photo

No Image Selected

Select

Client Information

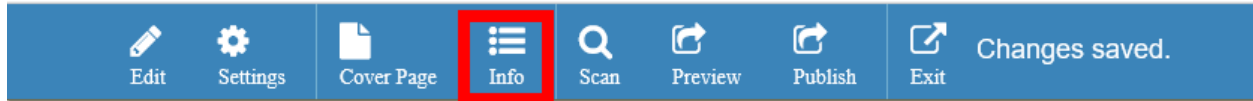
Client Name

Date Of Inspection

Inspection Address

Go ahead and fill out some of the fields on this page, and maybe choose a cover page photo. Note the “Your Business Information” section. This is where you’ll put your business address and license number. Instead of having to enter this on every inspection, this information can be entered on your dashboard and then will be automatically inserted into all inspections. We’ll cover editing your library on the dashboard in another tutorial.

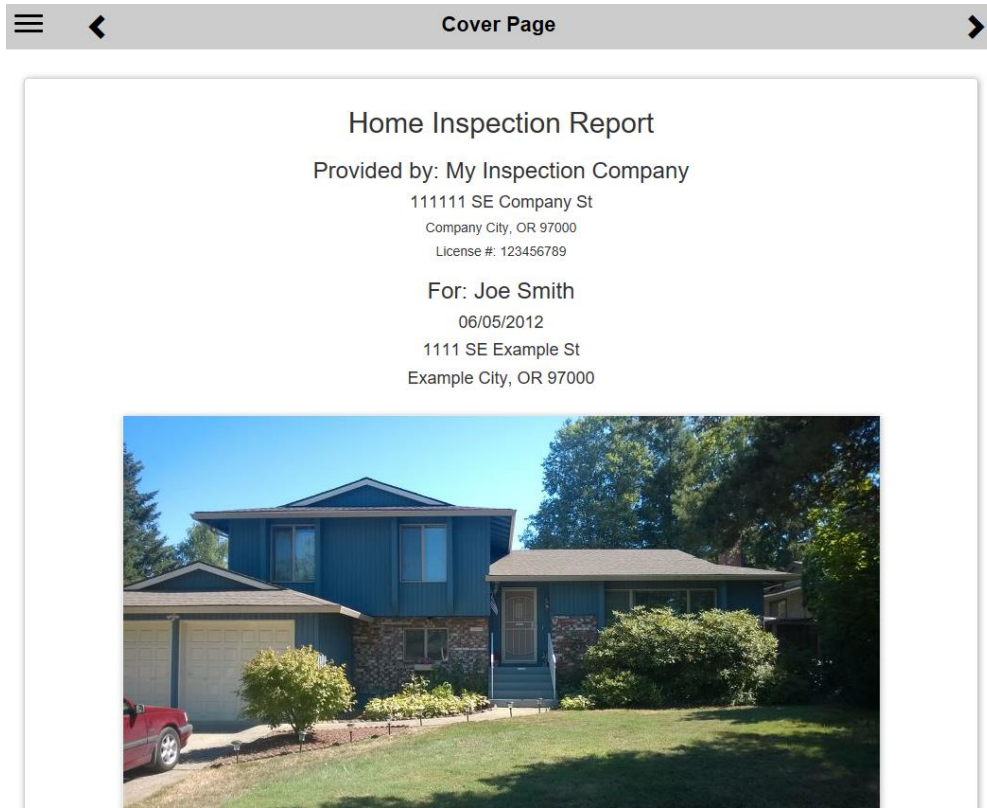
When you are satisfied with the way your cover page looks, choose “Info” from the top menu:



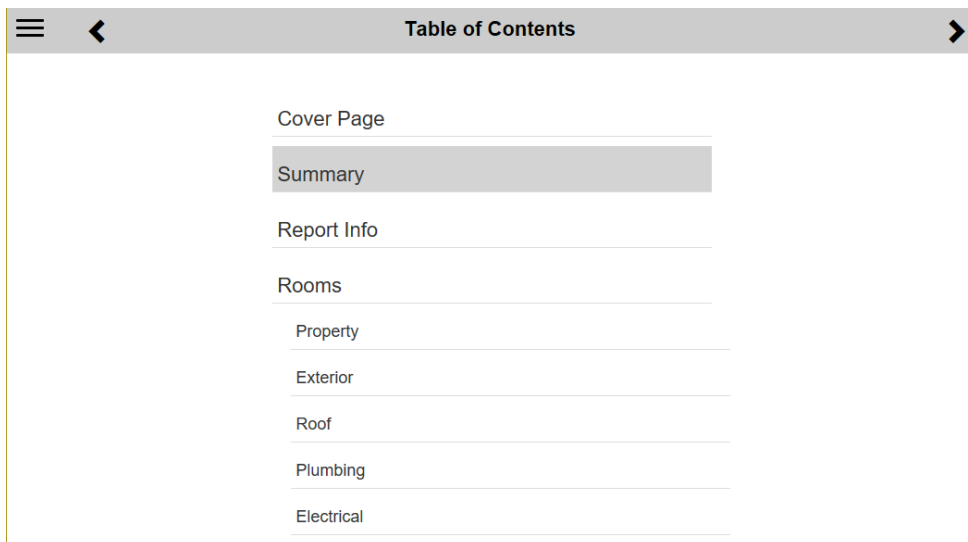
This section contains information that you want to include in each report at the beginning of the inspection. This is information like the client's name, the price of the inspection, the address, and the weather. Again, though you can click "change available fields" to change the options here, this should be done on your dashboard to create a set of fields that will appear on every inspection you do, rather than just editing this report. Go ahead and fill out the default fields:

A screenshot of the 'Report Info' form. At the top is a blue toolbar with icons for 'Edit', 'Settings', 'Cover Page', 'Info' (highlighted with a red box), 'Scan', 'Preview', 'Publish', and 'Exit'. To the right of the 'Exit' icon is the text 'Autosaving (save now)...'. Below the toolbar, the page title is 'Report Info' with a link '(change available fields)'. The form has a light gray header 'Property'. Below it are several input fields: 'Address:' with the value '11111 SE Example St' and a location pin icon; 'Square Footage:' with the value '2000'; 'Year Built:' with the value '1970'; 'Number of Baths:' with the value '3'; and 'Number of Bedrooms:' with the value '3'.

Let's preview the report again:



Now we've got some content! Click the menu in the top-left and choose "Table of Contents":



Click "Summary":

☰
◀
Summary
▶

Bath---Electrical

Outlet Conditions	<p>! One or more outlets do not have working GFCI protection. GFCI protection is needed in areas that can come in contact with water in order to help prevent prolonged shocking, so this is a safety issue. Moreover, one or more outlets have a hot / neutral reversed polarity.</p> <p>Contact a licensed Electrician for further evaluation and repair / replacement as needed.</p> <p>(see more)</p>
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There's the item which we added to the summary in tutorial 1. Notice that, since we chose "Safety Issue" as the status, it shows a red exclamation icon next to the text. These icons can be customized on your dashboard. The bold text is the recommendation we selected for an electrician. The text in this recommendation, as well as the options for various contractors, can also be customized on the dashboard.

Go back to the table of contents and choose "Report Info":

☰
◀
Report Info
▶

Property

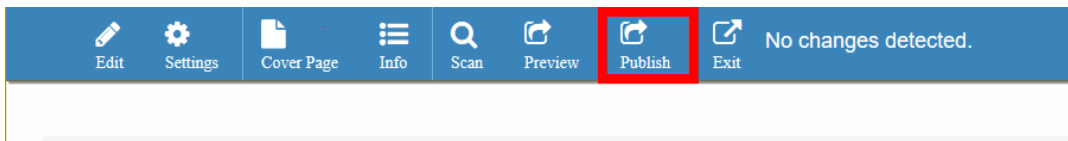
Address	11111 SE Example St
Square Footage	2000
Year Built	1970
Number of Baths	3
Number of Bedrooms	3

Client

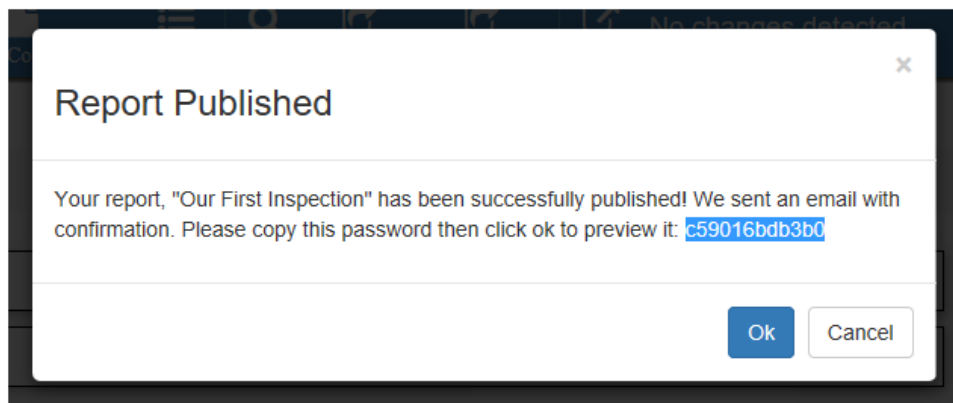
Name	Joe Smith
Phone	503-000-0000
Email	example@example.com

This is the content that was added on the "Info" page in the editor. It gives the reader a good overview of the details specific to this inspection. Now you can return to the editor using the menu.

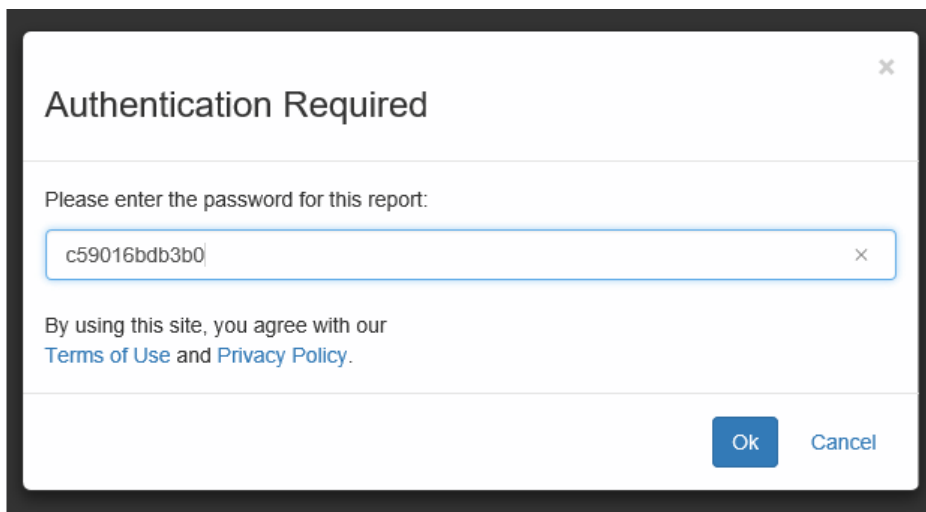
Go ahead and click “Publish”:



Once the report is published, you can copy or write down the password and then click “Ok” to open it:

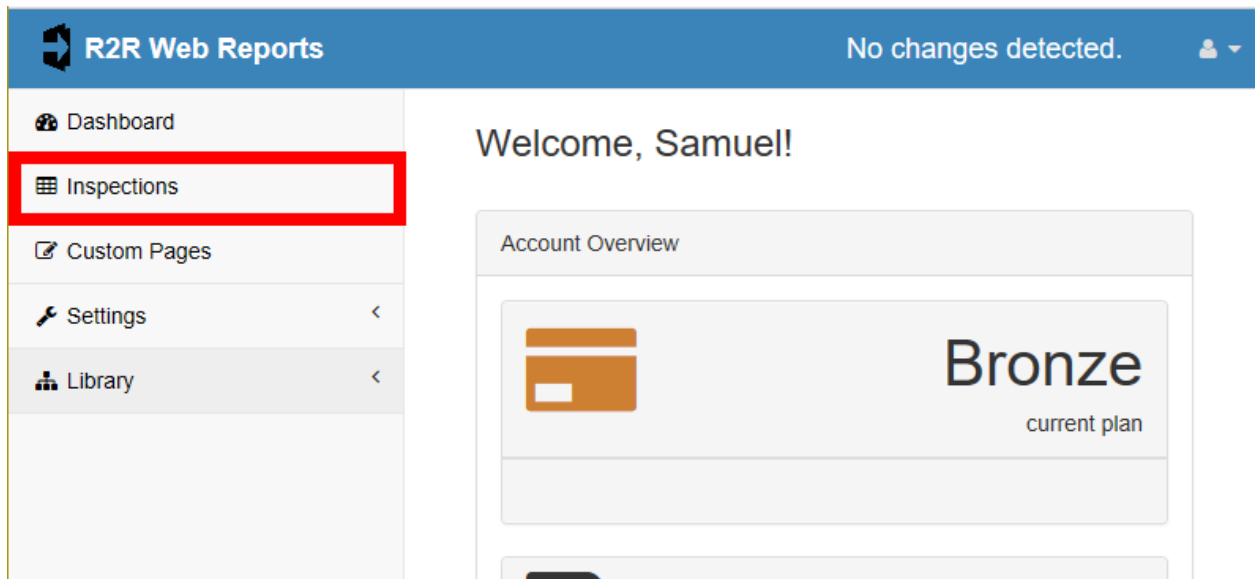


Once the report loads, enter the password:



Your report will load and should look very much the same as before, except now it can be shared with your clients, and also the PDF version will not have watermarks on it. To easily share this report, go back to your main dashboard. This can be done by entering www.r2rwebreports.com/dashboard.html in your address bar, or by simply clicking the back button to be redirected to the dashboard.

Click “Inspections”:



You can now click share to see information on how to share the inspection. You’ll also notice the “Un-Publish” button. If you need to make changes to the report after publishing it, this button makes changes possible (note that this will change the report password, and so you’ll have to send the new password to your client). Un-publishing and re-publishing a report will **not** deduct from your inspection balance, so feel free to do this as many times as you need to. Clicking “New PDF” will generate a new PDF if you notice unusual errors in your PDF:

The screenshot shows the R2R Web Reports dashboard. The top navigation bar includes the R2R logo, the text 'R2R Web Reports', and a status indicator 'No changes detected.' with a user profile icon. A left sidebar contains navigation options: Dashboard, Inspections (selected), Custom Pages, Settings, Library, Comments, Templates, Cover Page / Logo, Inspection Information, Recommendations, and Status Options. The main content area is titled 'Inspections' and features a 'New Inspection' button, a 'Refresh' button, and a search bar. Below this is a table with columns for Title, Last Modified (mm-dd-yyyy), Status, Password, and Operations. The table contains one entry: 'Our First Inspection' with a status of 'Published' and password 'c59016bdb3b0'. The 'Operations' column for this entry includes links for 'View', 'Share' (highlighted with a red box), 'Un-Publish', and 'New PDF'. At the bottom of the table, it says 'Showing 1 to 1 of 1 entries' and includes 'Previous', '1', and 'Next' navigation buttons.

It's worth mentioning that you should always download a PDF version of your reports once they are published for archiving purposes. Though at this time reports on RoomToRoom do not expire, it is good practice to keep a local copy of reports for your own protection.

That about covers it for this second Tutorial. You should now know the basic process to follow when inspecting a house with RoomToRoom Web Reports. In our next tutorial, we'll go over editing your library to customize the reports to your specific business needs. Thanks for reading!