

# How to use and fill out the Microsoft Word Report System

Microsoft Word is required.

If you do not have Microsoft word, or if you do not wish to put your logo or pictures in the reports, you can click this link to download a printable pdf version of the report (the photo section is not included):

[www.homeinspectionform.com/downloads](http://www.homeinspectionform.com/downloads)

## Index

1. Hand written reports (simplest format)
2. How to convert a hand written report into a digital report
3. How to include photos in the report
4. (Advanced Users) How to do the entire MS word report on a mobile device

### Chapter 1. Hand written reports:

Click here to get a blank report in MS word format: [www.homeinspectionform.com/downloads](http://www.homeinspectionform.com/downloads)

Click on the file labeled **Report\_Form\_Pro.docx** to download a blank copy of the form.

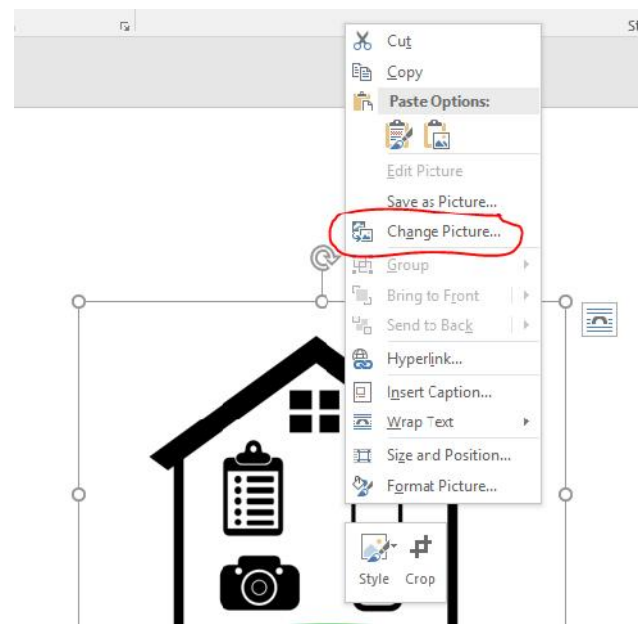
Save the form to your computers desktop.

**Special Note ->** This copy is now your master copy saved to your computer. Do not save over it. If you ever have an issue and you save over your master copy on accident, you can repeat the steps above to retrieve a new blank copy of the report.

**1.1** Double click on the file you just saved to your desktop to open it.

If you wish to insert your own logo on your report follow the steps below. If not, you can simply leave our logo on the report and skip to the next section which is **1.2**

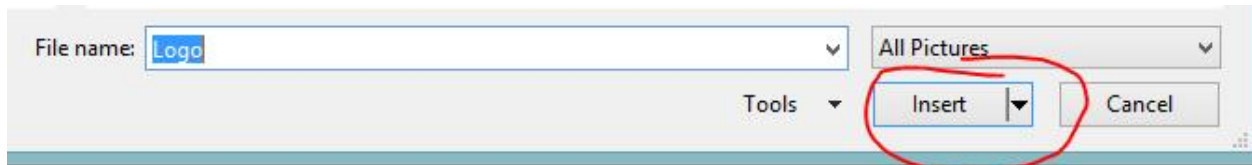
Right click on the logo on the first page and select change picture.



Select Browse > find the file location of your logo on your computer (if you do not have one, you will need to create one or have it created by a graphic artist, then come back to this step).



Once you find your logo file, select it and then click Insert



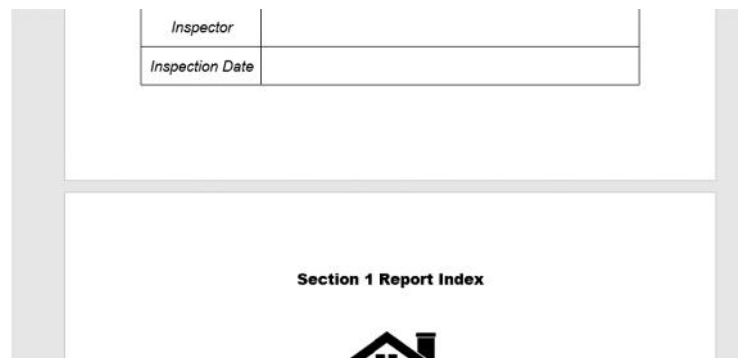
You should now see your logo on the report.

Make sure the logo is of proper size by scrolling down through the report to make sure the format of the report has not changed. You can adjust the size of the logo by clicking on it once to highlight it.

While holding the shift key on your keyboard, adjust the size of the by clicking and dragging on one of the dots in the corner of the logo graphic. (see illustration).



To check for proper formatting, take a look at the bottom of the first page and the top of the second, it should look like it does in the illustration to the right. You can make adjustments by clicking on a blank section of the report and hitting the enter key to move everything down or the backspace key to bring everything back up.



Each page on the report should look similar to the illustration on the right. If any section of the report is spilling onto the next page, adjustments should be made.

**Section 2 Site and Conditions at time of Inspection**

Season:	Weather:		Time:	
DESCRIPTION	Satisfactory	Fair	Poor	NA
<b>Gate</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTES:				
<b>Fence</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTES:				
<b>Shed / Outbuildings</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTES:				
<b>Pool</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTES:				
<b>Spa</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTES:				
<b>Pool House</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTES:				
<b>Pool Equipment</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTES:				
<b>Carport</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTES:				
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NOTES:				

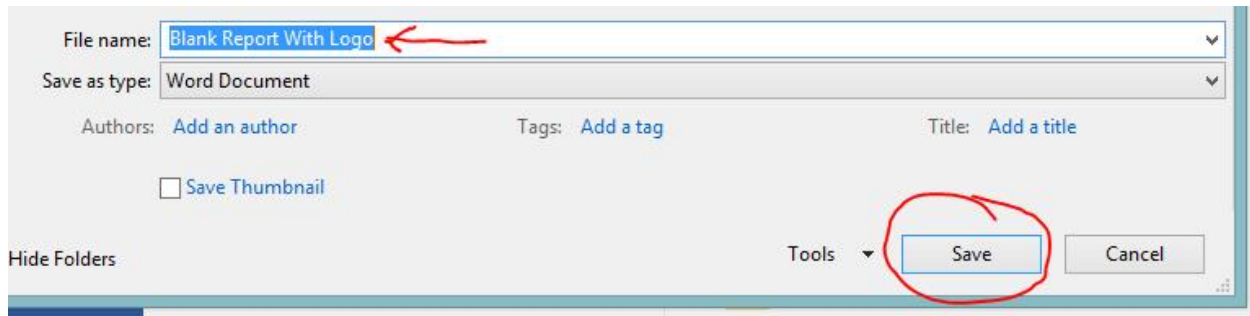
**COMMENTS:**

Once you are sure everything is in the right place, and your logo is the correct size, your new master copy of the report is ready to be saved and printed. Follow the next steps.

1.2 Click File then select Save As then click on browse



Choose a location you will remember to save your report to. Rename the file. Then click save



1.3 You now have a saved blank copy of your report with your logo on it.

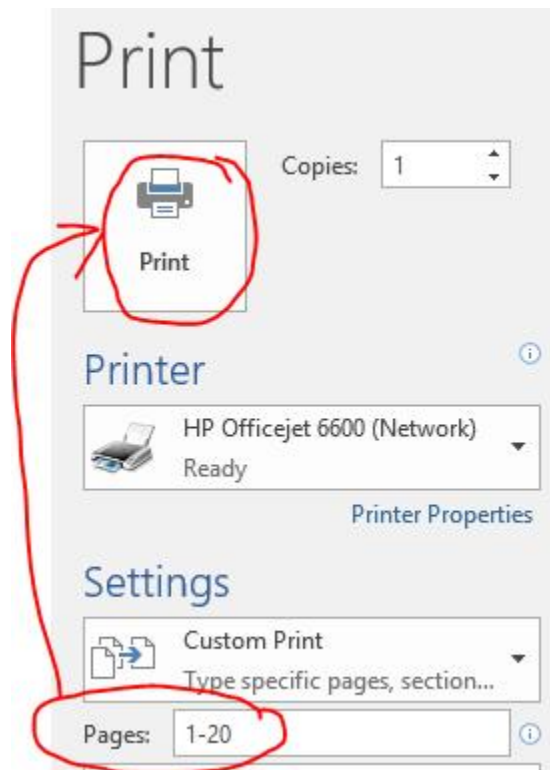
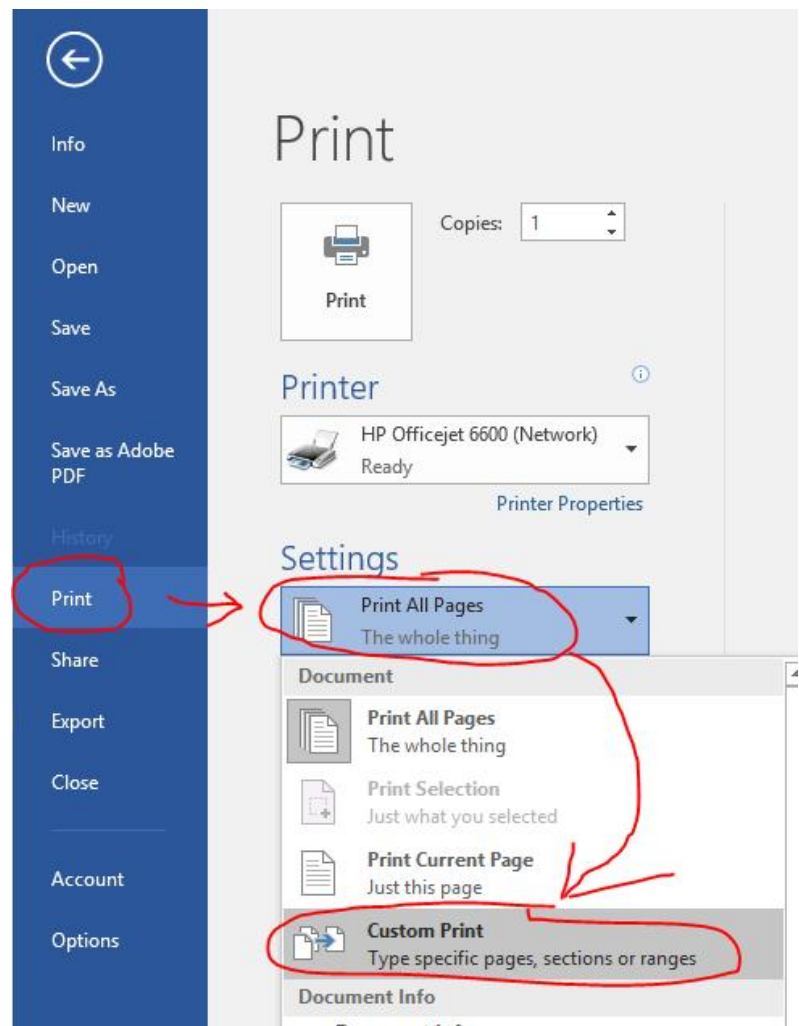
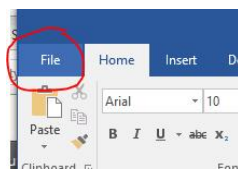
Click on File then select Print

Click once on Print All Pages

Select Custom Print

As illustrated in the box below, type in "1-20" in the pages section.

Then click Print



You now should have a printed copy of your report to fill out. It is a good idea to take this blank copy to a local copy / print store and have them make multiple copies of the blank report for you.

Always save the original copy to keep it safe from being written on. If you ever happen to lose your master printed copy, open the file on your computer and repeat step 1.3

#### 1.4 Filling Out the Report on Paper

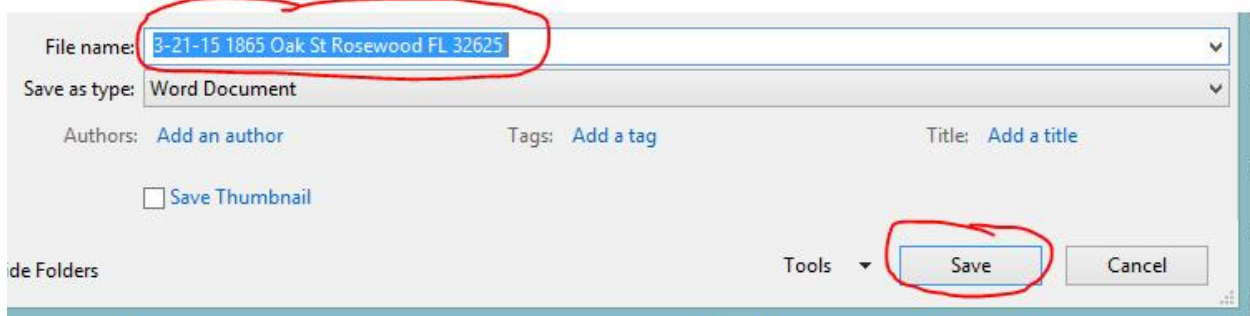
Without a doubt, this is the simplest way to complete an inspection report, you can put your reports into a simple binder or just use a clip board.

Get out a pen and simply fill out the report. Write down the information as required for each field. If an item on the report does not apply, place a check mark or 'X' in the NA field. Any item that is not NA or Satisfactory should have a brief description written down in the "Notes" section for the field. Once your report is filled out completely, it is always a good idea to do one more walkthrough of the property, to make sure nothing was missed in your report. There are blank sections on each page where you can enter your own inspection items. When you are satisfied with the report, be sure to fill out the inspection summary and inspector's signature field. The report can now be handed to the client as is. If you wish to clean up this report and type it up, then you can take it home and follow the steps below to deliver a digital report.

## Chapter 2. How to convert a hand written report into a digital report:

2.1 Open Microsoft word on your computer. Then open up your saved blank copy of the word report.

Before you fill in any information click File > Save As > Select a location to store the file > Rename the file with the inspection date and the address in case you ever need to access the report in the future (do not use any punctuation or characters: . / \ , instead just make it look just like the example. - example: 3-21-15 1865 Oak St Rosewood FL 32625



Now you can simply lay your paper report down next to your computer and type in the information page per page.

Place the cursor where you want to type and then start typing. Beware of formatting issues as you go. Do not to change the layout of the report, because it could change the look of the pages.

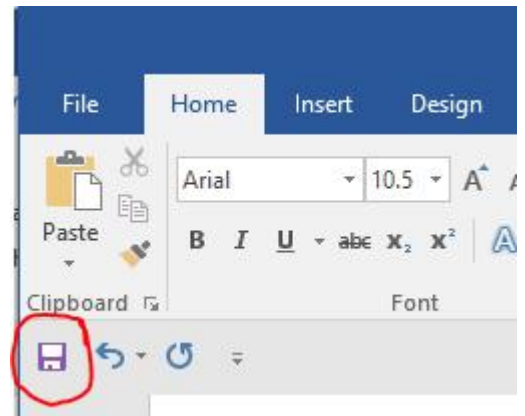
Start off slow and simply fill in each field.

## Section 2 Site and Conditions at time of Inspection

To insert an “X” in a box, simply click once on the box. To remove a “X” just click once on the “X”.

Season: Winter		Weather: Rain		Time: 10:15 AM	
DESCRIPTION	Satisfactory	Fair	Poor	NA	
<b>Gate</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	NOTES:				
<b>Fence</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	NOTES:				
<b>Shed / Outbuildings</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	NOTES: Missing one shingle on the center of the ridge-cap				

As you are filling out your report, it is important to click Save once in a while. It is easiest to just click the Save icon to save your current progress.



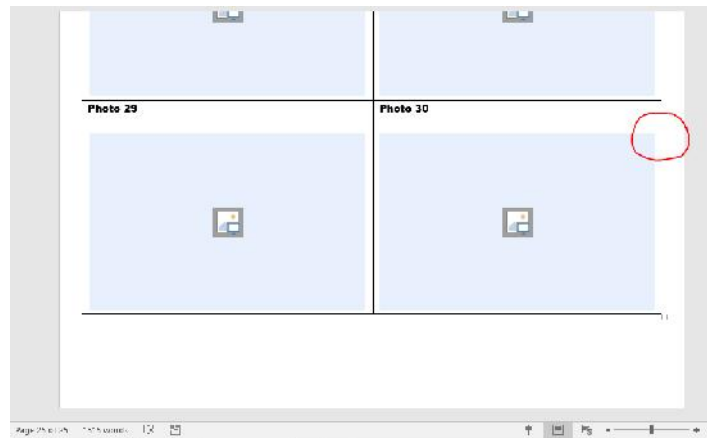
When the report is all filled out, including the inspection summary and Signature (just type your name in for now, and you can sign the hard copy later) click Save.

If you **ARE** going to include pictures in the report, then skip to **Chapter 3**.

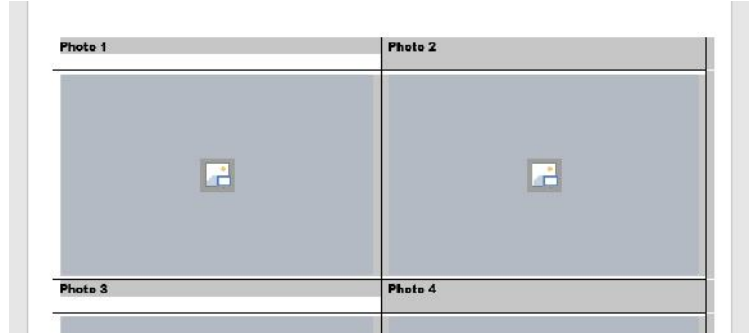
If you are **NOT** going to include pictures in your report, you can now turn the report into a PDF by following the next steps in section 2.2

### 2.2: Delete the photo pages

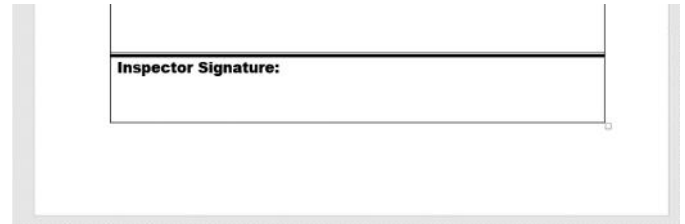
Scroll to the last page in the report and place your cursor behind the last photo by clicking there once.



Next, scroll to the top of page 21. While holding the shift key, click once above photo 1 to highlight the photo boxes. Then, click Delete on your keyboard.

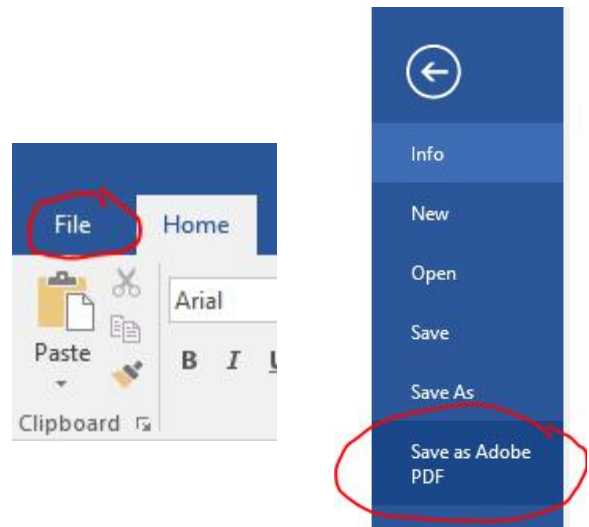


Your Report should now consist of 20 pages and the photo section should be gone. (You may need to use the backspace key to get rid of the last blank page).

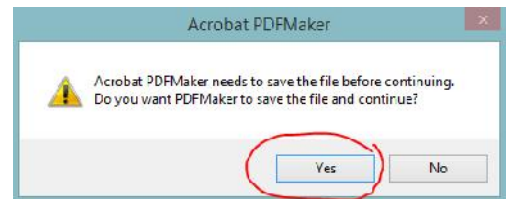


## 2.2 Converting the report to a pdf.

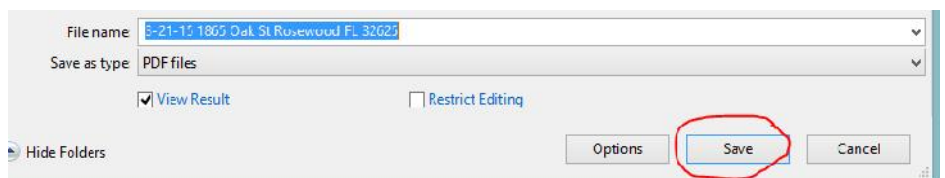
Now click File > Save as Adobe PDF



A popup will appear. Just click yes.



Click Save

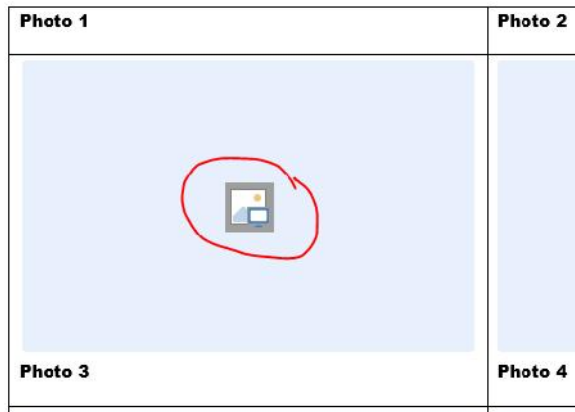


The default PDF viewer on your device will typically open automatically with the pdf file. You can now email the complete PDF of your report to the client.

### Chapter 3. How to include photos in the report.

Before starting this step, download your inspection photos onto your computer and save them to an easy to find location.

After you fill out the form section of the report, scroll down to page 21. Simply click on the photo icon in the center of each blue box. Click browse to find your pictures.



#### Insert Pictures

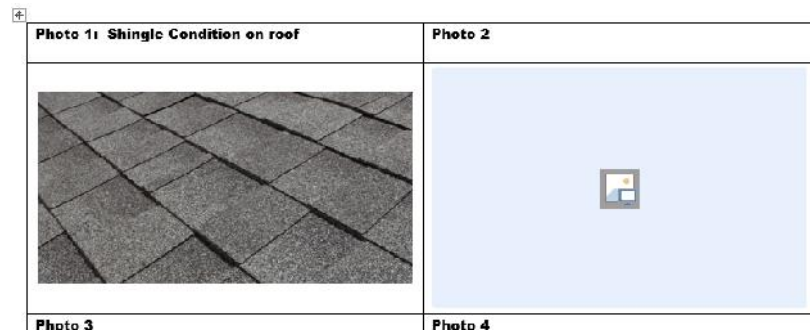
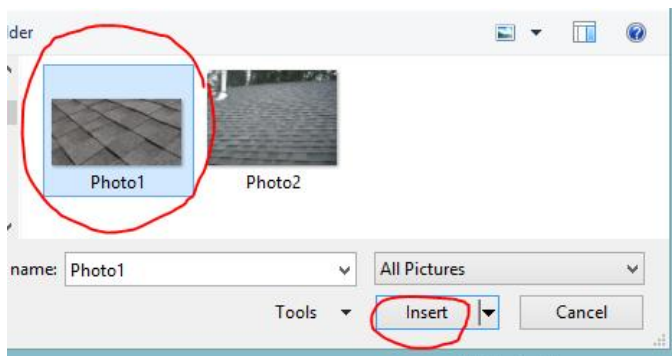


From a file

Browse files on your computer or local network

Browse

Select the photo you want to use and click Insert. The Photo will automatically fit the form and size of the photo box.



You can add notes to the pictures by clicking in the box behind the label Photo 1 and just type in the information



Repeat these steps until you have inserted all of your photos. You also might want to consider going back to the particular section of the report for each photo and include a note such as "see photo 1".

After you are satisfied with your report, go to section **2.2 Converting the report to a pdf**. Follow the steps to convert the report into a PDF document. You can then email the report to the client.



## Chapter 4. (Advanced Users) How to do the entire MS word report on a mobile device

This method is effective for those who are tech savvy and very comfortable using a mobile device.

Go to the app-store on your mobile device (google play store or the apple app-store) and do a search for "Microsoft Word".


Download the app to your mobile device.

Using your web browser on your mobile device, go to [www.homeinspectionform.com/downloads](http://www.homeinspectionform.com/downloads)

Click on the file **reportformpro\_blank.docx**

The report should open up in Microsoft Word on your mobile device. At this point you can save it to either your device or store the report on your cloud system. If you ever accidentally lose the file or have a formatting issue, you can start over by going back to the downloads page on our website.

When filling out a report is a good idea to save the report and rename it with the date and address of the inspection you are performing.

Simply fill out the report right on your phone or tablet. Make use of voice to text by clicking the microphone icon on your devices keypad. 

If you are using a phone, it works best to hold your phone sideways.

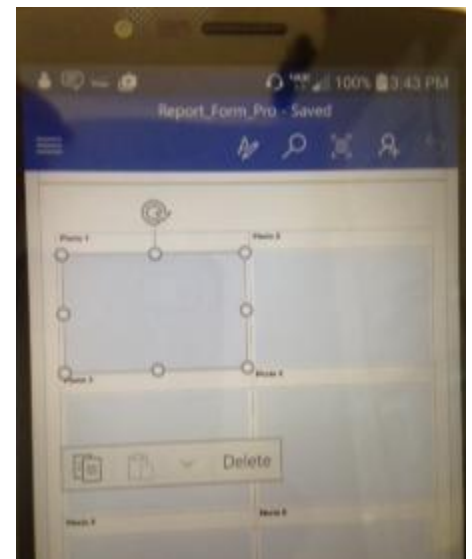
You can tap once to check or uncheck the check boxes in the report.

It is a good idea to save the report often. Be sure to take your time as you fill out the report. If the app appears to be frozen, give it a minute to catch up and click save. Close other apps that are being unused on your device to improve processing speed.

Scroll up and down to change pages in the report.

To insert photos directly into the word doc, follow the steps below:

Tap once on the photo field you wish to insert a picture into. The box should be highlighted.

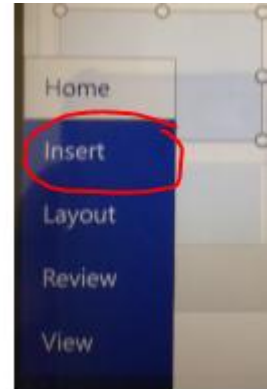
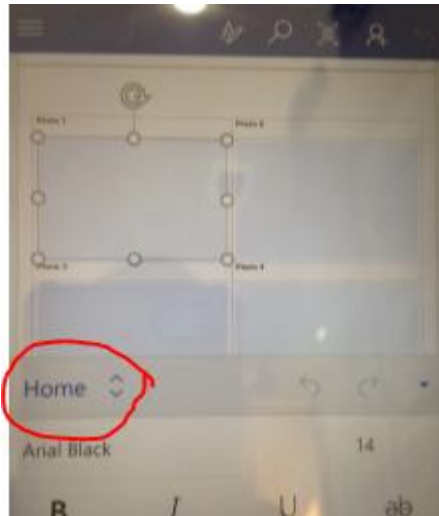


Tap on the commands button. It looks like the letter “A” with a pencil

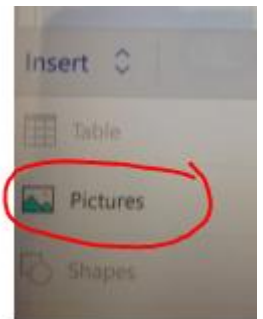


Tap on Home

Next Tap on Insert



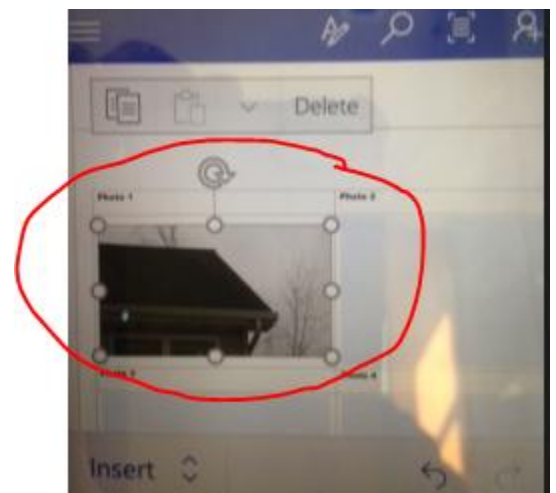
Tap on pictures. Find the location you pictures are stored in (this will vary from device) If you are unsure, try selecting camera, gallery, or images. Choose the photo you wish to use by tapping on it once.



Your photo should now be inserted into the photo box.

If you are ever having trouble editing the photos or your report, simply email a copy to yourself and open it up on your computer.

Also, plan ahead, and always keep extra paper copies of the report as backup. Things happen such as batteries dying or a last minute call to an inspection.



Once your report is complete, be sure to click save. If you wish to email it out in Microsoft Word format, simply click on the navigation button in the upper left hand corner of the screen.



Select Share, and then select share as attachment. You will be prompted to select your desired email account to send the file from.

Choose your recipient or type in their email address. Fill in the subject line and body of the email. Then simply click send.



If you wish to convert the document to a pdf, you can simply click the navigation button and select print. You may have to wait a moment for it to load. Select print or save to pdf. This option is not available on all devices.

