



Step by Step

How To

Change the Ratings on a Template

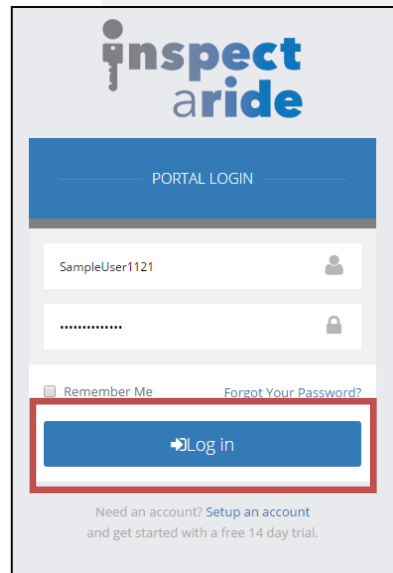
This How To article explains how to change the ratings on a template

For a complete list of available How To documents visit the Support section of our website: www.inspectaride.com/support/

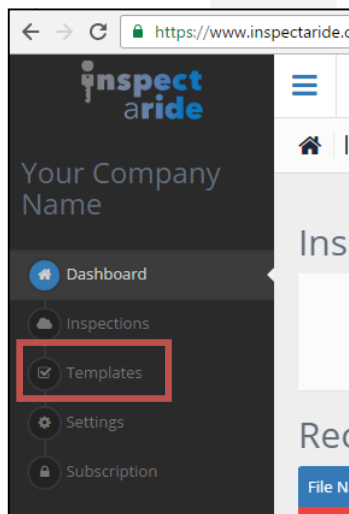
HOW TO: CHANGE THE RATINGS ON A TEMPLATE

You can easily change the ratings on a template to use different rating terms. This is done in the Template Editor on the InspectARide portal. Below we will show the steps for doing this. We will use the example of changing one of the ratings of the 'Basic Vehicle' template that comes with the software. The ratings it starts with are: G = Good, F = Fair, and P = Poor. The change we will make is to change G = Good to be S = Satisfactory.

1. The first step is to login to the InspectARide portal. This is done by entering your username and password here: <https://www.inspectaride.com/login>

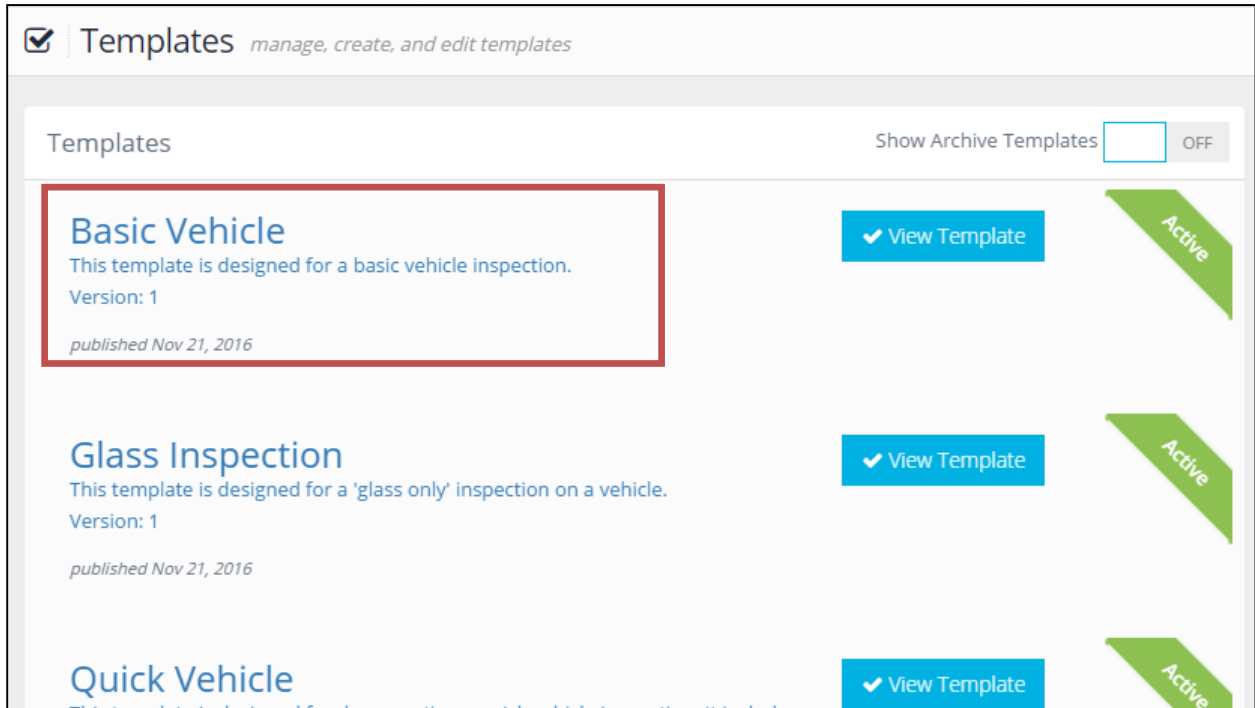


2. Once logged in, go to 'Templates'.

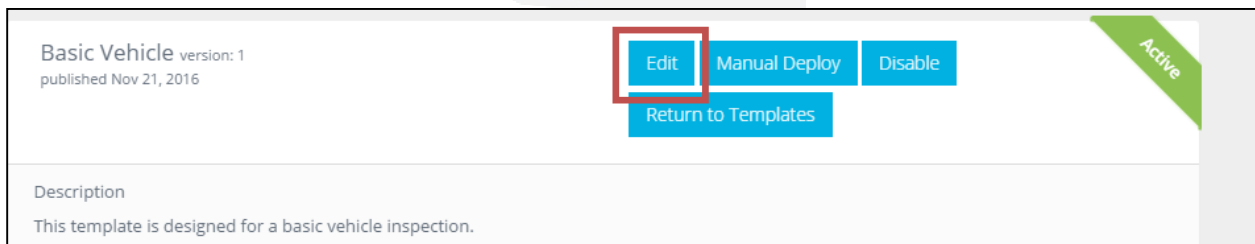


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- Here we have a list of all of our templates and we need to select the one we want to update so we'll select the 'Basic Vehicle' template.

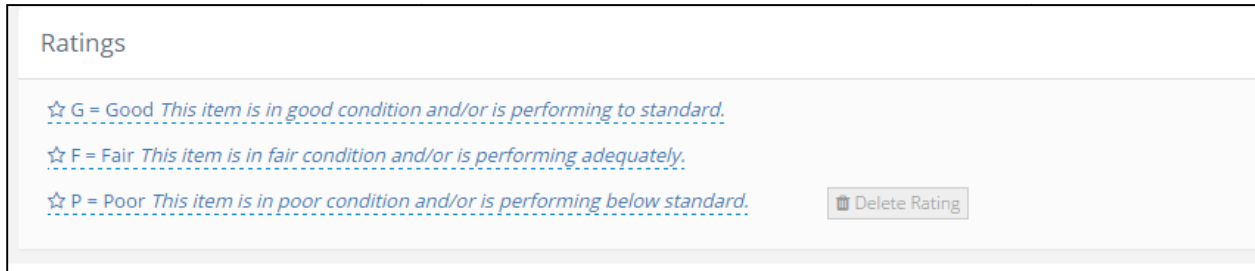


- Now tap on 'Edit' so that we can make changes to it.



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- Next, we need to go to the Ratings section which is near the top. Here you will see the ratings that we are currently using.

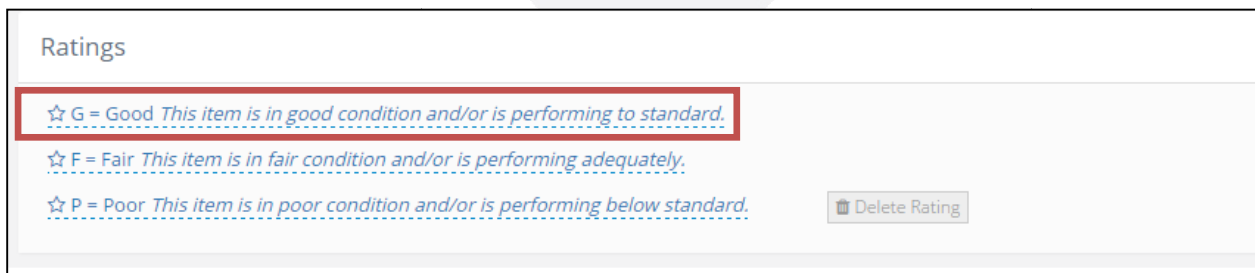


Ratings

- ☆ G = Good *This item is in good condition and/or is performing to standard.*
- ☆ F = Fair *This item is in fair condition and/or is performing adequately.*
- ☆ P = Poor *This item is in poor condition and/or is performing below standard.*

Delete Rating

- You can edit a rating by simply tapping on it. Since we will be changing the Good rating to Satisfactory we will tap on it.

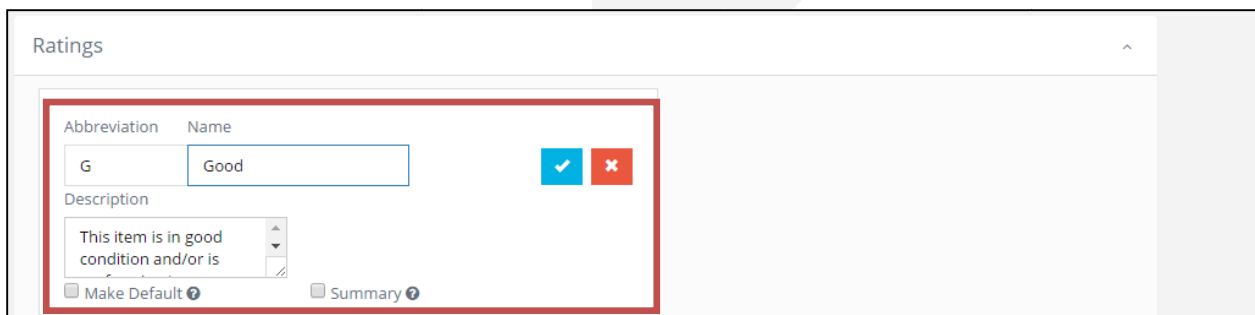


Ratings

- ☆ G = Good *This item is in good condition and/or is performing to standard.*
- ☆ F = Fair *This item is in fair condition and/or is performing adequately.*
- ☆ P = Poor *This item is in poor condition and/or is performing below standard.*

Delete Rating

- Now we can see all the properties associated with the 'Good' rating. Let's change the Abbreviation to S, the Name to Satisfactory and update the Description.



Ratings

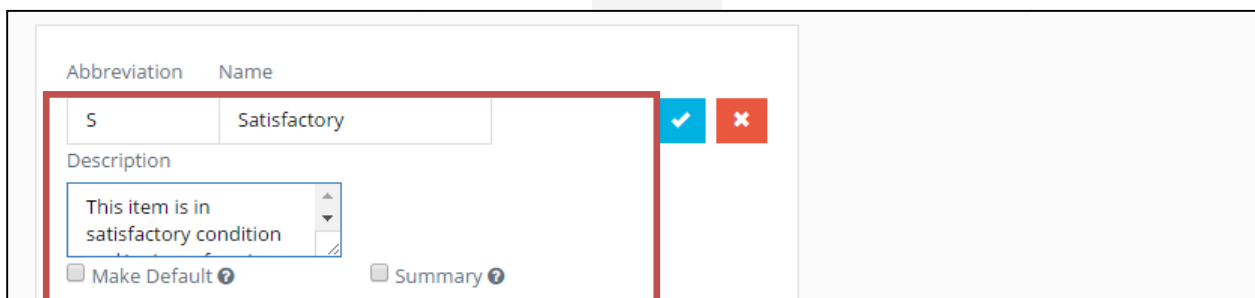
Abbreviation Name

G Good

Description

This item is in good condition and/or is

Make Default Summary



Abbreviation Name

S Satisfactory

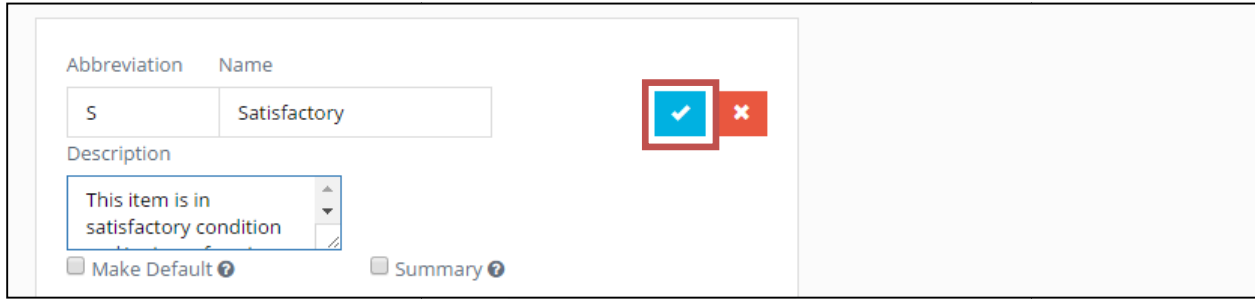
Description

This item is in satisfactory condition

Make Default Summary

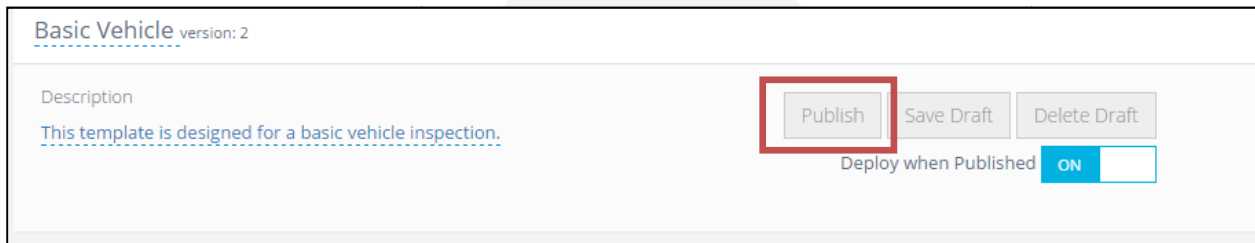
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8. To save the changes, tap on the checkmark to the right.



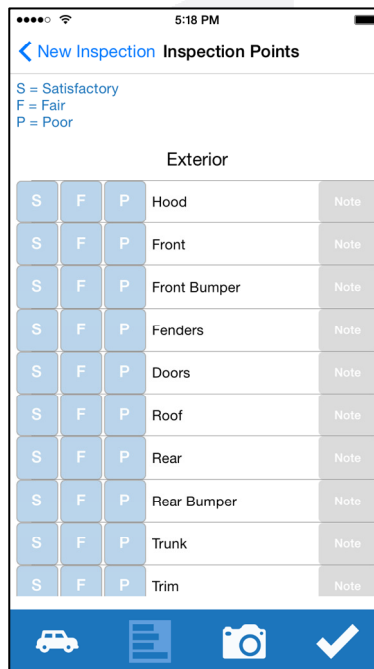
The screenshot shows a form for editing a rating. The 'Abbreviation' field contains 'S' and the 'Name' field contains 'Satisfactory'. The 'Description' field contains 'This item is in satisfactory condition'. A blue checkmark icon in a square is highlighted with a red box, indicating the save action. Below the form are checkboxes for 'Make Default' and 'Summary'.

9. Now that we have the rating has been updated we're ready to publish this template so that it is available on our mobile device. To do this, scroll back to the top and tap on the 'Publish' button. As long as the 'Deploy when Published' setting is set to 'ON' then the next time you open your mobile device (and it has a internet/data connection) this updated template will be available.



The screenshot shows the 'Basic Vehicle' template page. The 'Description' field contains 'This template is designed for a basic vehicle inspection.' The 'Publish' button is highlighted with a red box. To the right of the 'Publish' button are 'Save Draft' and 'Delete Draft' buttons. Below these buttons is a 'Deploy when Published' toggle switch set to 'ON'.

10. When we start our next inspection with the template we can see the updated rating.



The screenshot shows a mobile app interface for a 'New Inspection'. The title is 'Inspection Points'. Below the title is a legend: 'S = Satisfactory', 'F = Fair', and 'P = Poor'. The main content is a table with the following columns: Rating, Note, and Item. The 'Exterior' section contains the following rows:

Rating	Note	Item
S		Hood
S		Front
S		Front Bumper
S		Fenders
S		Doors
S		Roof
S		Rear
S		Rear Bumper
S		Trunk
S		Trim

The bottom of the screen has a navigation bar with icons for a car, a list, a camera, and a checkmark.