Home Inventory 4

PRODUCT MANUAL

Document version: 4.1
Home Inventory application version 4.4.1

Contents

1 Copyright and Contact Information 4
2 Getting Started 5
2.1 System Requirements 6
2.2 Installation 7
2.2.1 Installing from the Mac App Store 7
2.2.2 Installing from our web site 7
2.3 Running Home Inventory for the first time 9
2.4 Purchasing the application license 10
3 Tutorials 12
3.1 Basic terms and definitions 12
3.1.1 Why keep a home inventory? 12
3.1.2 Organization of your data within the application 12
3.2 Main application window 14
3.3 Application preferences 18
3.3.1 General 18
3.3.2 Security / password protection 20
3.3.3 Automated iCloud Drive backup 21
3.4 Customer feedback 24
3.5 Managing tags, collections, rooms and locations/partitions 25
3.6 Adding new inventory items 28
3.7 Working with inventory items 31
3.7.1 Adding photos and other documents 31
3.7.2 Bulk photo import 40
3.7.3 Adding journal entries 44
3.7.4 Adding events 44
3.7.5 Adding item insurance information 46
3.7.6 Adding item insurance claim records 47
3.7.7 Track loaned items 48
3.7.8 Sorting of inventory items 49

3.7.9 Filtering of inventory items 50
3.7.10 Archiving inventory items 52
3.7.11 Moving photos between items 53
3.8 Periodic inventory value logging 54
3.9 Heirs and estate planning 56
3.10 Photo & Document Album View 57
3.10.1 Filtering and grouping of documents in the photo album 59
3.11 Inventory value history chart 61
3.11.1 Chart printing and clipboard 62
3.12 Inventory value distribution chart 64
3.13 Packing lists 66
3.14 Reports 68
3.14.1 Sending generated reports by email 70
3.14.2 Item List report 71
3.14.3 Comprehensive report 73
3.14.4 Warranty report 74
3.14.5 Summary report 75
3.14.6 Photo Album report 76
3.14.7 Estate report 77
3.14.8 Insurance report 78
3.14.9 Loans report 79
3.14.10 Packing list report 80
3.15 Importing inventory records from a CSV file 81
3.15.1 Import form 82
3.16 Backing up and restoring your data 85
3.16.1 What is Data Backup? 85
3.16.2 Backing up your data 85
3.16.3 Restoring your data from a backup file 85
3.17 Importing data from other users 87

1 Copyright and Contact Information

Copyright Notice

Copyright 2020 The Blue Plum Software Inc. All rights reserved.

This manual may not be copied in whole or in part without express written permission from The Blue Plum Software Inc. Your rights to the **Home Inventory** software are governed by the license agreement accompanying the software.

Document Accuracy

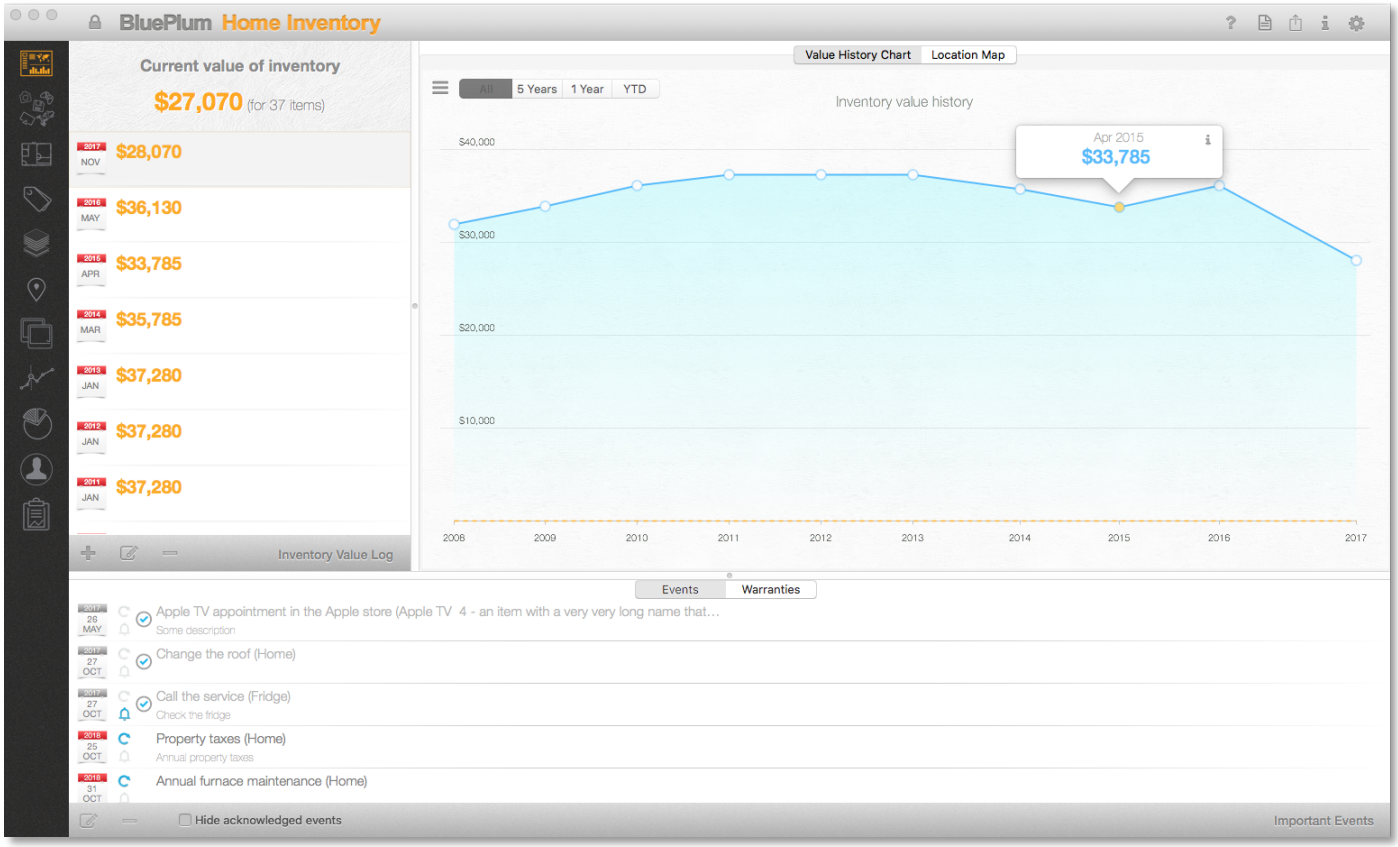
The Blue Plum Software Inc. makes a good-faith effort to ensure this manual is accurate and up-to date. Some mistakes may make their way in, however. Please send any corrections or suggestions for improving this manual to info@theblueplum.com.

Technical Support

If you are experiencing any problems using **Home Inventory**, please visit the support section of the theblueplum.com website. You may also contact The Blue Plum Software's Product Support directly by sending an email to info@theblueplum.com.

2 Getting Started

Welcome to the Blue Plum Software's Home Inventory!



About this guide

The purpose of this document is to help you familiarize yourself with the **Home Inventory** application.

Audience

This document is written for users who are new to **Home Inventory** and are just getting started. If you have used other Blue Plum Software applications in the past, you may already be familiar with some of the concepts explained in this document.

Organization of this guide

Please note that this document is written for the latest version of **Home Inventory**.

This document explains the features and functionality of **Home Inventory** and how you can use the application. There is conceptual information as well as task-oriented steps throughout the document. If you are not sure where to begin, please review the "Getting started" section.

2.1 System Requirements

- An Apple computer with MacOS 10.12 (Sierra) or later.
- Internet connection (in case you want to back up your data to a cloud storage)

2.2 Installation

2.2.1 Installing from the Mac App Store

If you're familiar with installing apps from the Mac App Store, you will find that **Home Inventory** is installed in the usual way.

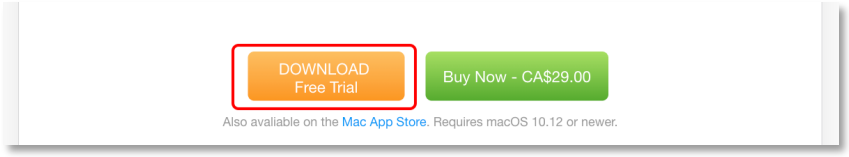
1. Click "Download on the Mac App Store".

2. Click the price, and then click Buy App.
3. There is no step three.

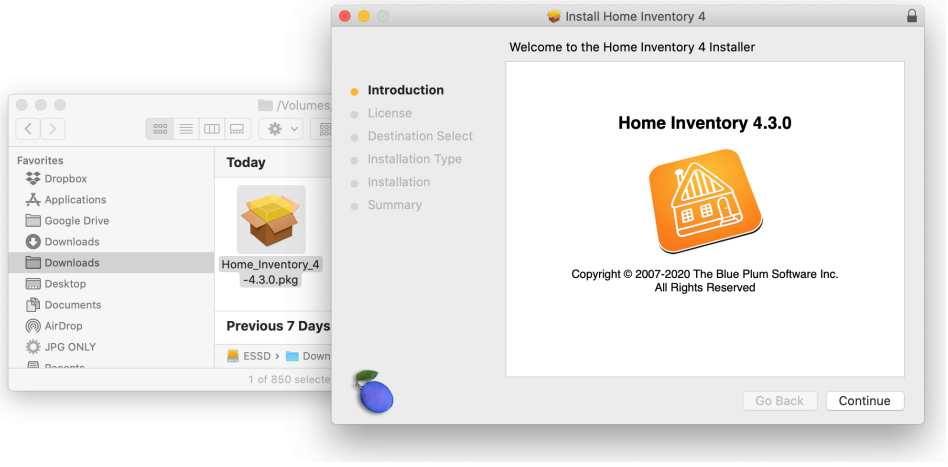
After downloading, **Home Inventory** is automatically installed in the Applications folder, and its icon appears in Launchpad.

2.2.2 Installing from our web site

1. Download the application from our web site's Home Inventory page (https://theblueplum.com/mac/homeinventory/). Click on the 'DOWNLOAD' button to download the latest installer:

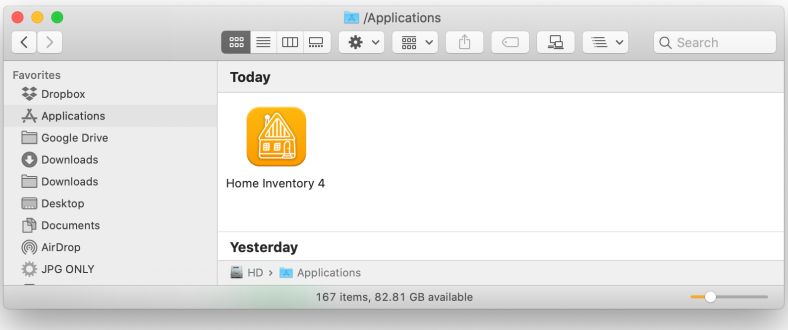
   

2. Once you downloaded, double-click on the installer file:

3. Follow instructions to install the application.

4. Once the installation process has finished, you will be able to find the Home Inventory application in the 'Applications' folder:

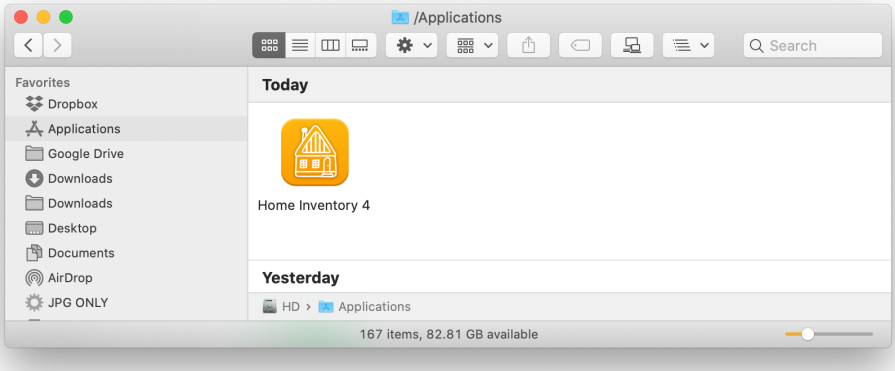


Your 14-day free trial will start once you open the application. It is a fully functional version that will let you use it for the duration of the trial. After that, if you want to continue using the application, you will need to purchase the license. You can purchase the license either from the application itself or from the application's web page (https://theblueplum.com/mac/homeinventory/).

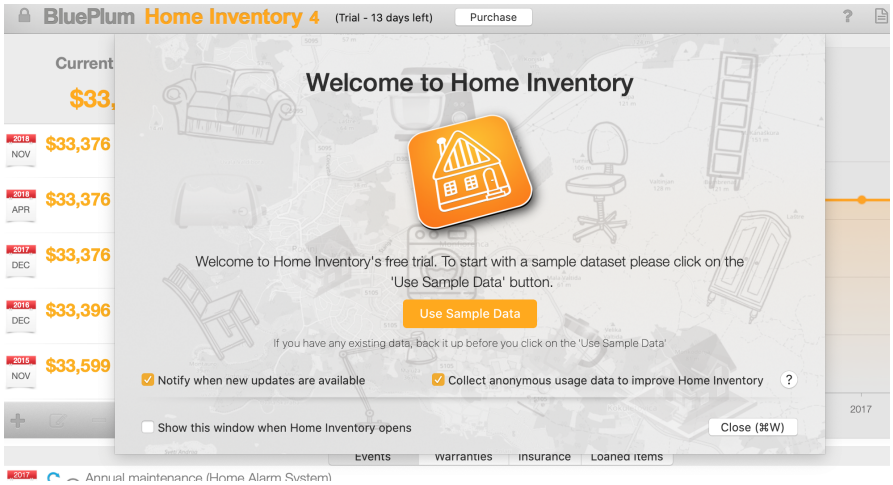
2.3 Running Home Inventory for the first time

*Open **Home Inventory***

To open the **Home Inventory**, double-click its icon in the Applications folder.



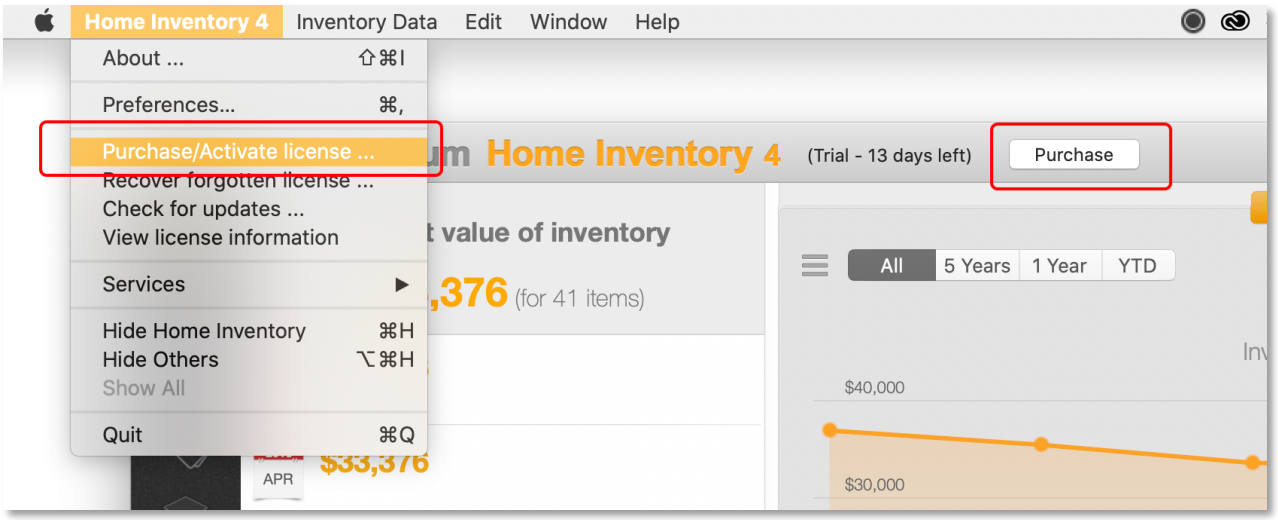
First time you run the application downloaded from our web site, the application will offer you to use sample data. Sample data will let you evaluate the application without having to enter inventory items and images yourself:



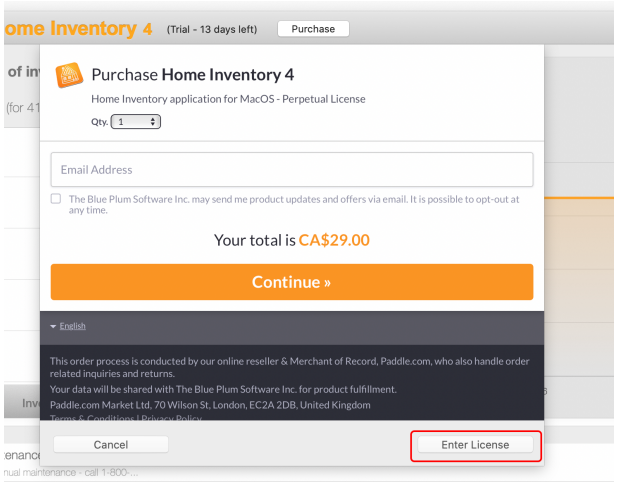
If you used sample data, and want to start a fresh inventory, go to the main menu of the application and select the 'Application data -> Delete all application data' menu command.

2.4 Purchasing the application license

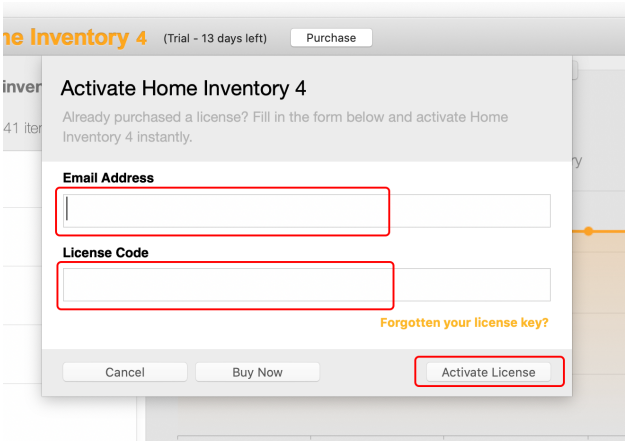
If you are happy with the way application works, and want to purchase the application license, click on the **'Purchase'** button located in the application's titlebar, or use the main menu's command 'Home Inventory 4 -> **Purchase/Activate license'**:



The purchase form will guide you through the purchase process. At the end, the application will be fully activated, and you will receive the confirmation email with the license number and the purchase receipt.



If you have purchased the license through our web site, click on the 'Enter License' button (displayed above) to enter your email and the license key:


Inventory 4
(Trial - 13 days left)
Purchase
Activate Home Inventory 4
Already purchased a license? Fill in the form below and activate Home Inventory 4 instantly.
Email Address
License Code
Forgotten your license key?
Cancel
Buy Now
Activate License

3 Tutorials

3.1 Basic terms and definitions

3.1.1 Why keep a home inventory?

Severe weather is on the rise across the country, making it more critical than ever to ensure that your property and contents are properly insured. In 2015, there were 501,500 structure fires reported in the United States. These fires caused $10.3 billion in property damage. One structure fire was reported every 63 seconds. If your home is damaged or destroyed, it's important that it has been insured for its accurate replacement value.

Homeowners insurance typically protects your belongings if they're damaged or destroyed by a covered peril, not just the physical structure of your house. This is called personal property coverage. If you're a renter, your landlord's insurance doesn't protect your belongings. You must have a renters insurance policy with personal property coverage in place to protect you in case your belongings are damaged or destroyed.

A thorough inventory of your home's contents and the associated value of the contents will help you and your insurance representative confirm adequate coverage. If you need to make a claim, your home inventory will help you receive proper compensation.

A home inventory is a comprehensive report which includes detailed descriptions and photos of the personal property in and around your home.

Home Inventory application will help you make and maintain a home inventory of your home and any other property you own. It lets you organize your home inventory items in collections, rooms, locations and/or assign one or more tags to each item. It helps you add photos, videos, receipts, manuals, contracts and any other document related to your items.

3.1.2 Organization of your data within the application

Your application data contains several main entities:

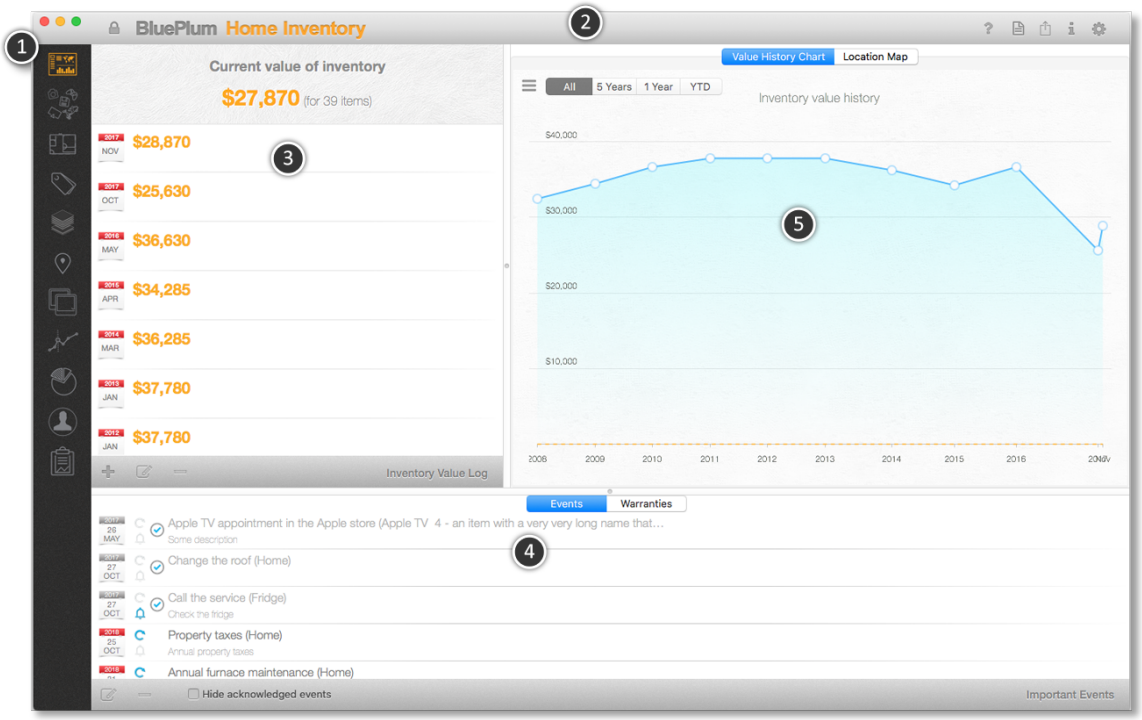
- Rooms – It contain all rooms of your properties. When you add a new inventory item, to make a better inventory organization, assign it to a room. If the inventory item is mobile, you can create a special room called 'Mobile items'. Later, you will be able to use a room as filtering criteria in other views and reports.
- Collections – If you have a collection of something, paintings for example, you can assign define a collection entity and assign all relevant items to that collection. You will be able to assign an item

to one collection only. If you need categorization that requires assigning an item to multiple categories, use tags instead.

- Tags – To let you organize your items in a better way, create a few tags before you start adding your items to the application. Tags let you assign a single item to multiple categories. For example, if you have tags called 'Electronics' and 'Mobile devices', you can tag you phone with both tags. The application lets you perform filtering of views and reports based on tags.
- Locations/partitions – If you have multiple properties, create one location entity for each property you own. That way you can assign individual inventory items to a location. Locations entity can be useful if you are sharing a home with another person. In that case a location can serve a role of a home partition.
- Value logs – you can assign an initial value of an item, a purchase price., but its value will usually decrease over time. It is a good practice to update estimated values of your items periodically – once a year, when you renew your insurance policies, is usually often enough. A single value log will keep values of all your items logged at a certain month and a year. If you define annual depreciation rate for your item, the application will automatically suggest its new estimated value at the time when you are creating a new value log.
- Item documents – you can add multiple document entities to each of your items. A document entity will have a name, description, type and an associated photo/file.
- Journals – add a journal entry to an item each time something important happens with it. A car maintenance log for example.
- Events – If an item needs a periodic maintenance, bill payment etc., create an event record with a scheduling information. You can add the created event to Mac's notification center to make sure you will get notified even if the Home Inventory application is not running.

3.2 Main application window

Once you start the application you will see the main '**dashboard'** view of your data. It gives you a quick overview of your current net worth state, a history chart of your net worth changes and a table with a list of your monthly net worth records:



1 - Sidebar command bar

Sidebar command bar contains buttons that let you choose different sections of the application.

Dashboard – displays the application start page with the most important information.

Items – lets you manage (add/edit/delete) your inventory items.

Rooms – lets you manage (add/edit/delete) your property rooms.

Tags – lets you manage category tags.

Collections – lets you manage (add/edit/delete) your collection entities.

Locations – lets you manage (add/edit/delete) property locations.

Photo album – photo album lists all your items' photos and documents.

Value charts – a chart showing historical changes of your inventory values.

Pie charts – a chart showing distribution of your home inventory values.

Heirs - lets you manage heirs for your estate planning

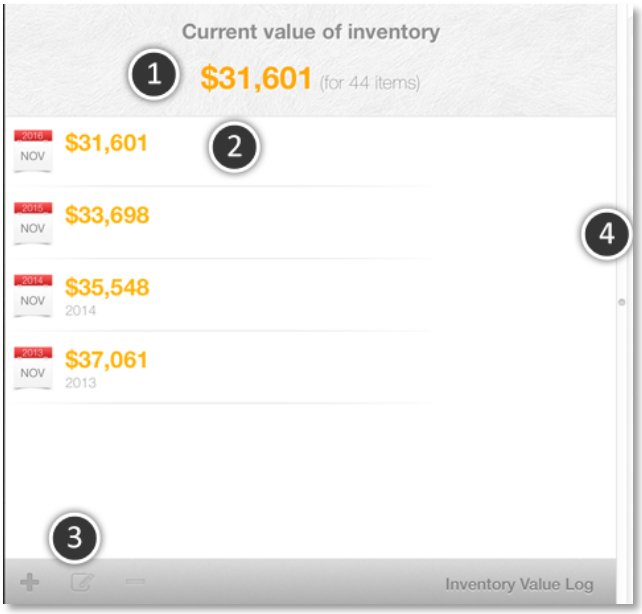
Reports – this section lets you generate multiple inventory reports.

2 - Application title bar

Application title bar contains buttons that let you:

- Lock the application ( ) with a password.
- Help button ( ) – downloads this manual from our web site.
- Backup/restore application data ( ) to/from a single compressed file.
- Report a bug to us, tweet or post a Facebook comment ( ).
- Display application version information ( ).
- Display application settings ( ).

3 – Inventory value logs table



This table contains a list of all your inventory value logs. In this section you can add, edit or delete a value log. Each value log contains a list of items with their estimated values for the given time.

1 – Total value of your items based on the most recent value log. If no value log was added, a total purchase price of all your items will be displayed.

2 – A single row contains log's time (a month and a year) and total inventory value.

3 – Add, Edit and Delete buttons related to your log entries.

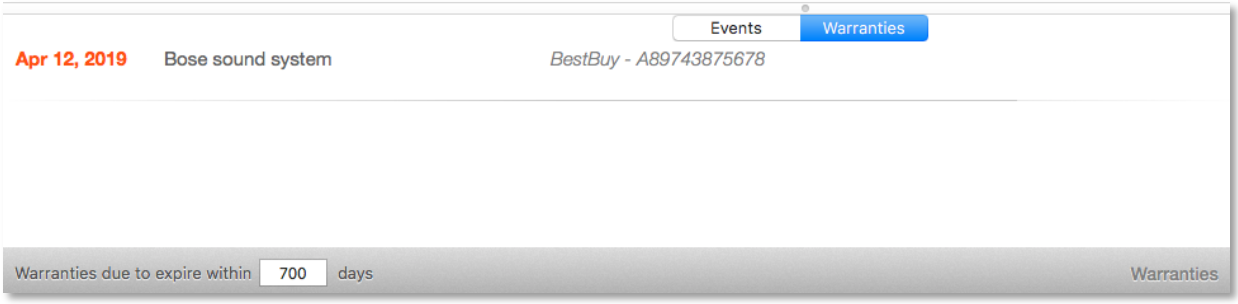
4 – A vertical slider that lets you change relative size of application sections.

4 – Events and warranties table

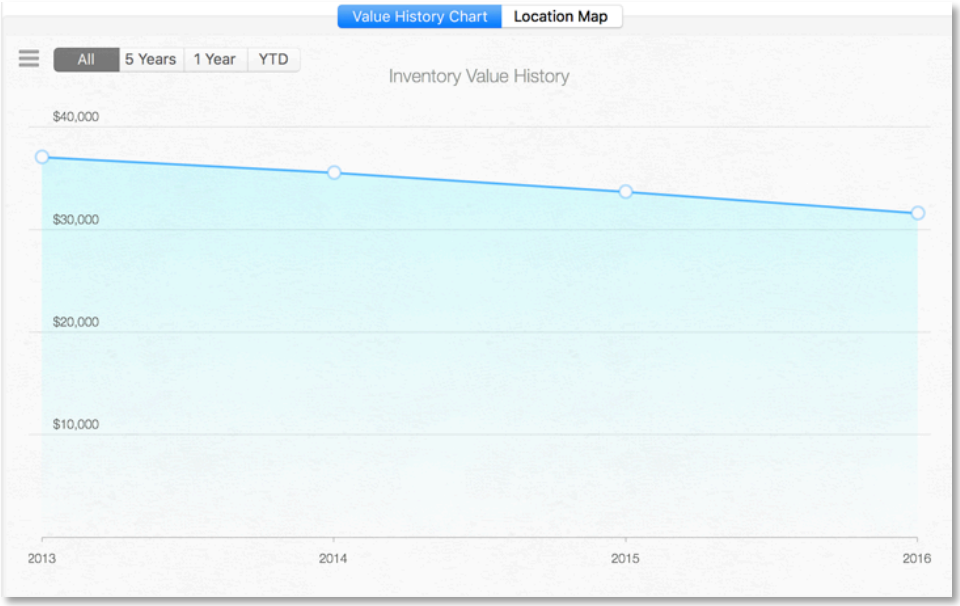
Events in this table are sorted by their due date[1] – most recent first. An event has a name and description[3], as well as flags marking it as recurrent , tied to Mac's notification center[2] and whether it is acknowledged or not . You can edit or delete[4] events from this table. To add a new event, you need to select an inventory item first and create it from there.

You can also hide already acknowledged events, so they won't show up in this table[5].

If you click on the 'Warranties' tab, you will see a list of warranties due to expire within a set number of days:



5 – Chart

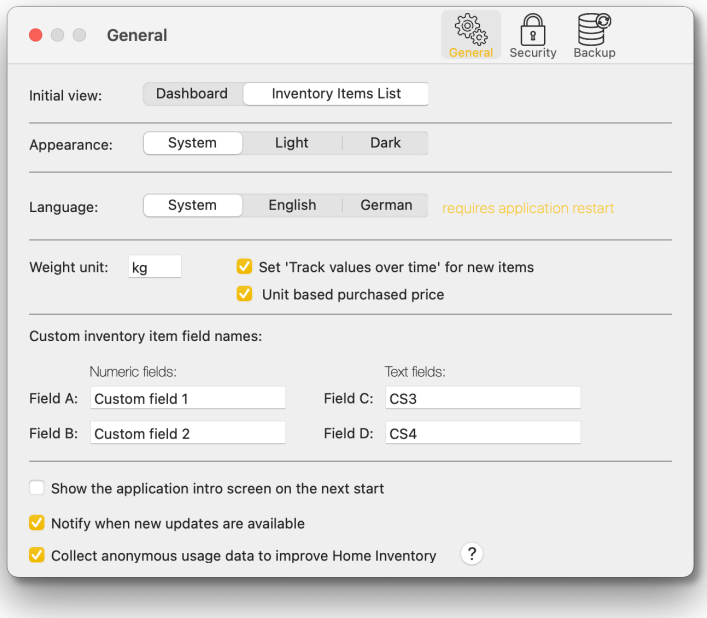


The chart area displays historical values of inventory logs, and the map section ('Location Map') lets you see locations of all your properties on a map *(feature available only for software purchased through Apple Mac App store)*.

To change what is displayed in the chart, select the chart menu that will open a chart settings form.

3.3 Application preferences

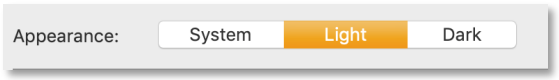
To change application preferences, select the ‘Preferences/Settings’ button at the top-right side of the application window:



3.3.1 General

3.3.1.1 Appearance change (dark mode)

In the new MacOS Mojave (10.14), the application will be presented to the user in either the light or the dark mode, depending on your OS settings. If you want to change your application's appearance independent of the system's setting, you can do that in the 'Settings' form. If your system's default appearance is 'Light', you can select that the application gets displayed in the 'Dark' mode.



3.3.1.2 Language

Besides English, the application has been localized to German as well. If you want to display it in German, but your system's main language is not German, you can select it with this option. For the setting to take effect, you will need to restart the application.

3.3.1.3 Weight unit.

When you create packing lists, and weight of your luggage is important, you can specify weight of your items in whatever unit you want.

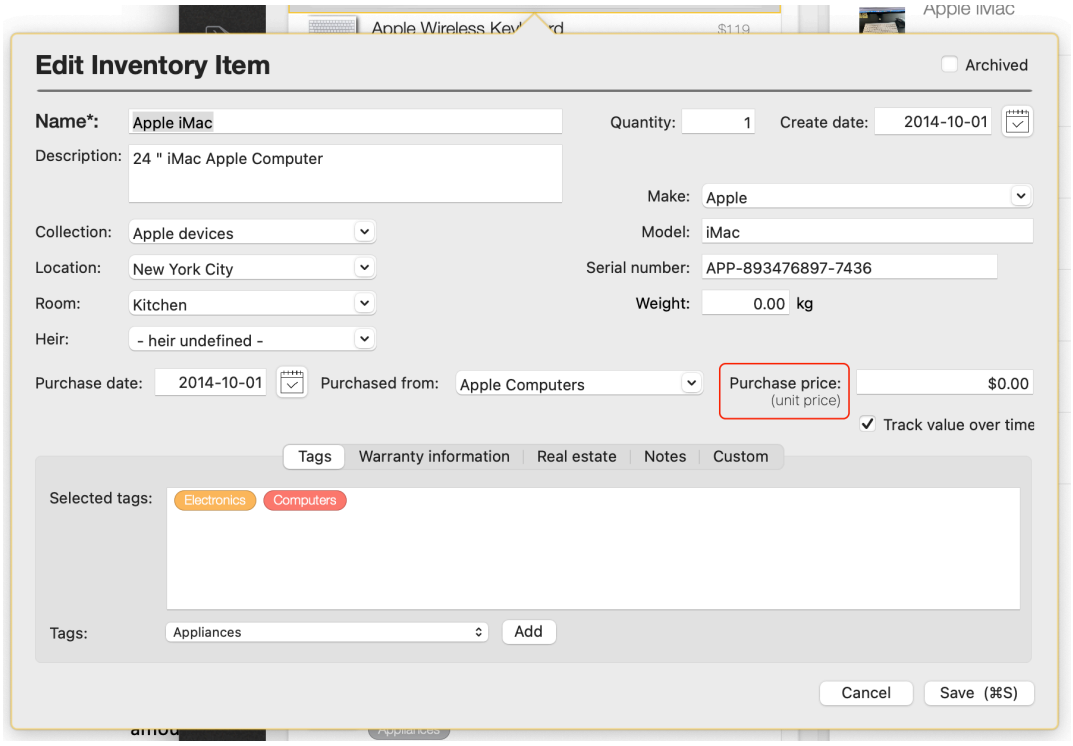
3.3.1.4 Set 'Track values over time' for new items.

If that option is checked, the 'Track value over time' option will be checked by default when you create a new inventory item. If the 'Track value over time' option is not checked, the inventory item will not appear in the list of items when you create a new value log (Section 3.8) of your inventory.

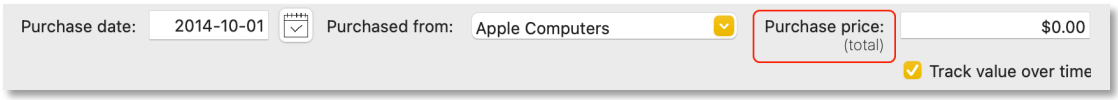
3.3.1.5 Unit based purchase price.

If that option is checked, reports will calculate total value of reported inventory items by multiplying the purchase price (or replacement cost) with the item quantity. Otherwise (default case), the purchase price amount will be considered a total amount you paid regardless of the quantity you specified.

If that option is checked, a '(unit price)' label will be displayed beside the purchase price field when you edit an inventory item record:



Otherwise, a '(total)' will be displayed:

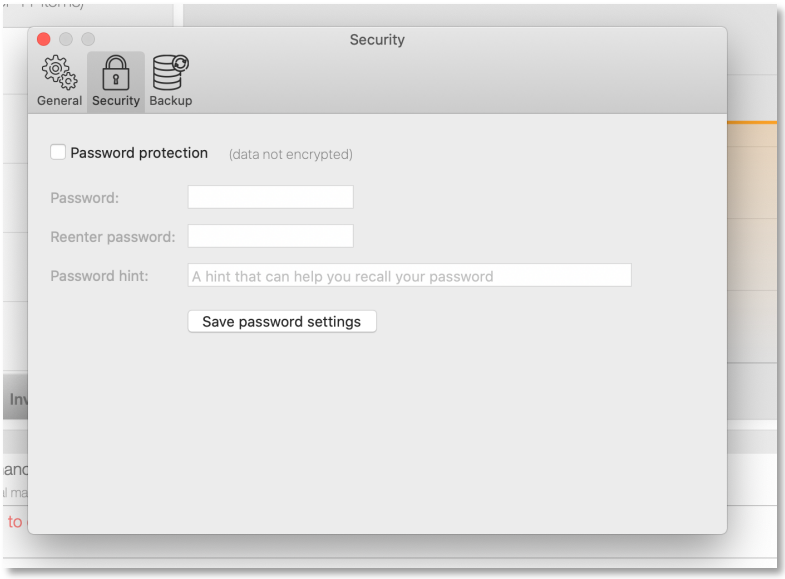


This option is not relevant for value logs (Section 3.8). When you create a value log record of your inventory, make sure that the amount you enter is always a total value for that inventory item regardless of the quantity you specify.

3.3.1.6 Custom fields

You can define up to 4 of your own custom inventory fields - 2 numerical and 2 literal ones. If you set names of these fields in the 'Settings' form, you will be able to use the fields in the inventory item form and inventory reports.

3.3.2 Security / password protection



If you enable password protection, the application will prompt you for a password each time it starts, or if you decide to lock it yourself.

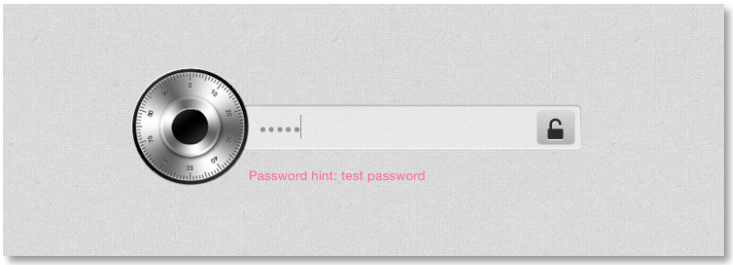
Fill in all the fields and click on the '**Save password settings'** button to add a password protection to your application. Password protection will prevent other people who have access to your computer to view your information.

Note: *Keep in mind that the net worth data file stored on your disk is not encrypted.*

To lock the application, select the lock button in application's title bar:

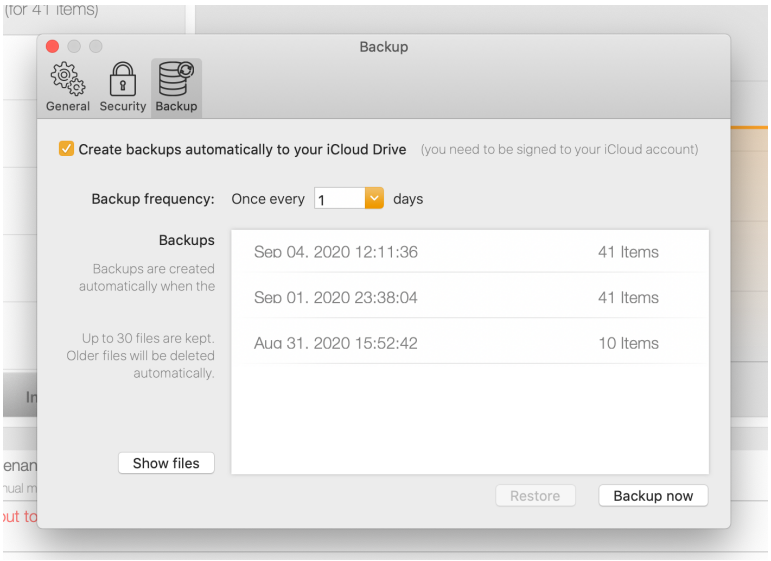
Once you lock the application you will see the password prompt screen:

To enter the application, type in your password and press enter or click on the unlock button. If you fail to type in the right password more than 2 times, the application will display your password hint:

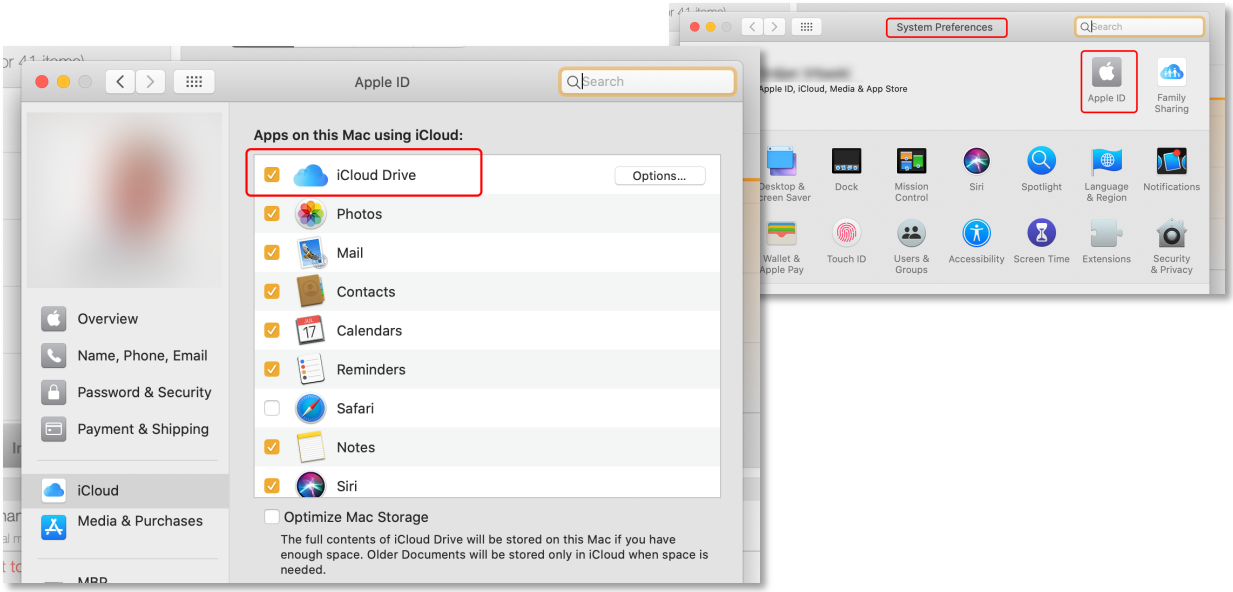


If you forget your password and the hint cannot help you, you can launch Apple's ***Keychain Access*** application and search for **'Home Inventory 4'** password. You will need your system's administrator's password in order to recover the Home Inventory password.

3.3.3 Automated iCloud Drive backup



Besides a manual backup (see section 3.16), the application lets you enable automated backups to your iCloud Drive. For this option to work, you need to be logged in to your iCloud account through 'System Preferences'. The 'iCloud Drive' option must be checked:

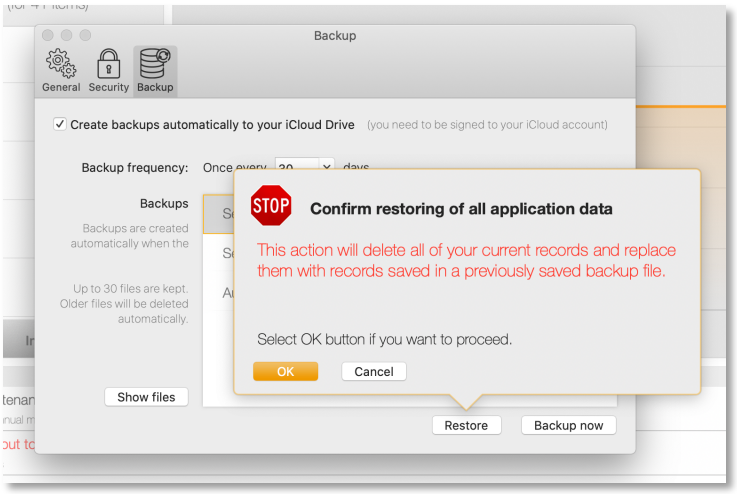


Once you enable automated backups, you can choose the backup frequency as well. Once the application creates more than 30 backup files, it will start deleting older backups and keep only the 30 most recent ones.

Even though the application will create backup files on its own, you can create the manually as well. To immediately create a backup file, click on the 'Backup now' button.

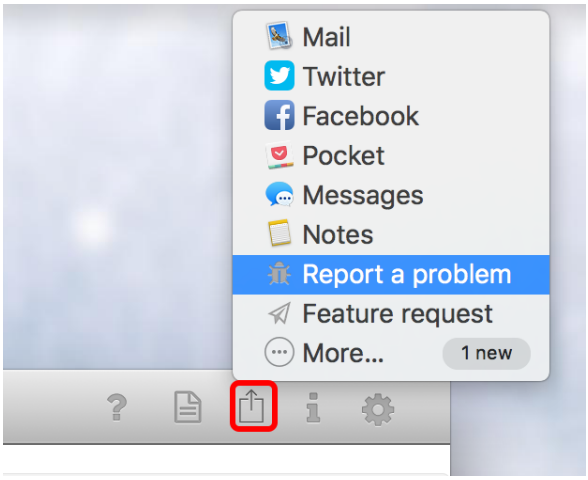
The 'Show files' button will open your iCloud Drive's backup folder.

To restore your data from one of the backup files, select the file from the list and click on the 'Restore' button:


Backup
General
Security
Backup
Create backups automatically to your iCloud Drive
(you need to be signed to your iCloud account)
Backup frequency:
Backups
Backups are created automatically when the
Up to 30 files are kept. Older files will be deleted automatically.
Show files
STOP
Confirm restoring of all application data
This action will delete all of your current records and replace them with records saved in a previously saved backup file.
Select OK button if you want to proceed.
OK
Cancel
Restore
Backup now

3.4 Customer feedback

If you discover a problem in the application or just wish to contact us with feature suggestions for future versions, click on the feedback button in the application title bar:

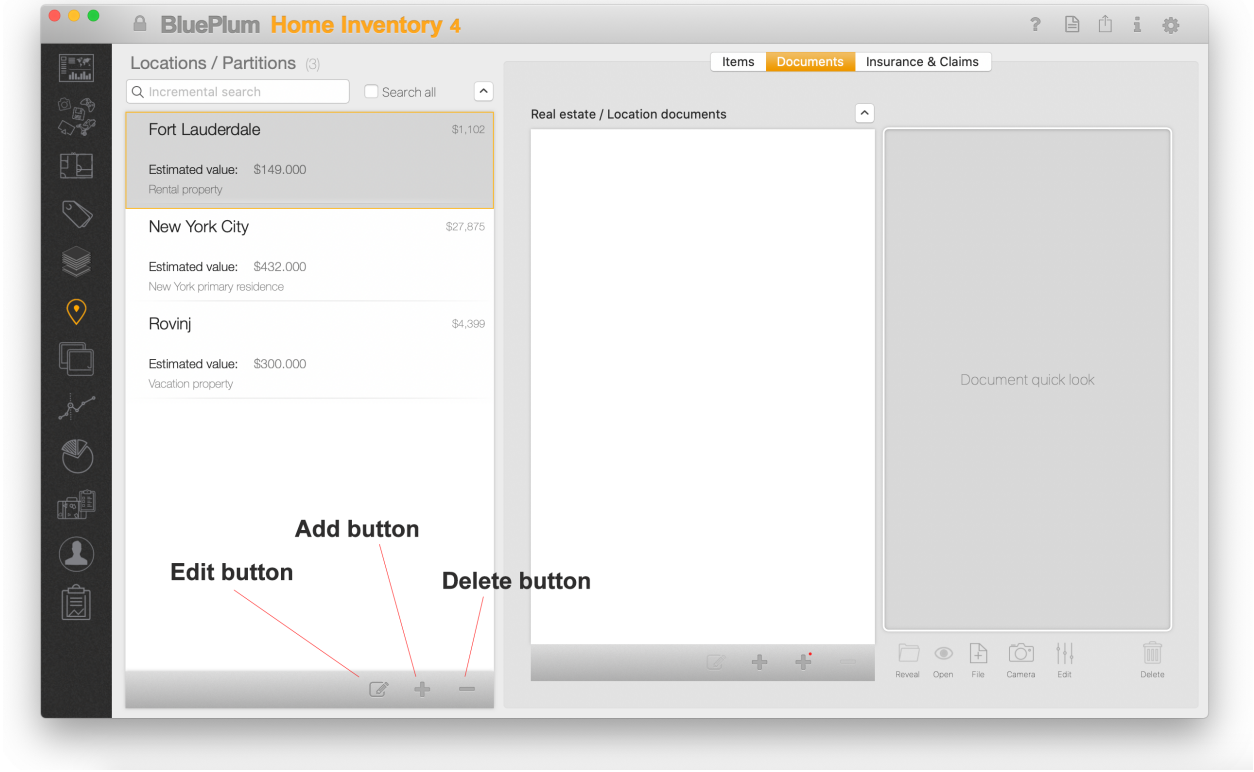


If you decide to, you can tweet about the application or post a Facebook message from the application as well.

3.5 Managing tags, collections, rooms and locations/partitions

Adding, editing and deleting of tags, collections, rooms and locations is performed in a similar way. To manage any of these, select the appropriate sidebar command button.

The following example will show how to add, edit and delete locations to a home inventory. To display the Locations view, select its sidebar button:



All locations will be displayed in a table. If you have many records in a table and want to search for a one quickly, type in several letters from the location name into the 'incremental search' field, and the application will display only locations that match you input. If you want to search for any content stored with your location, check the 'Search all' checkbox first.

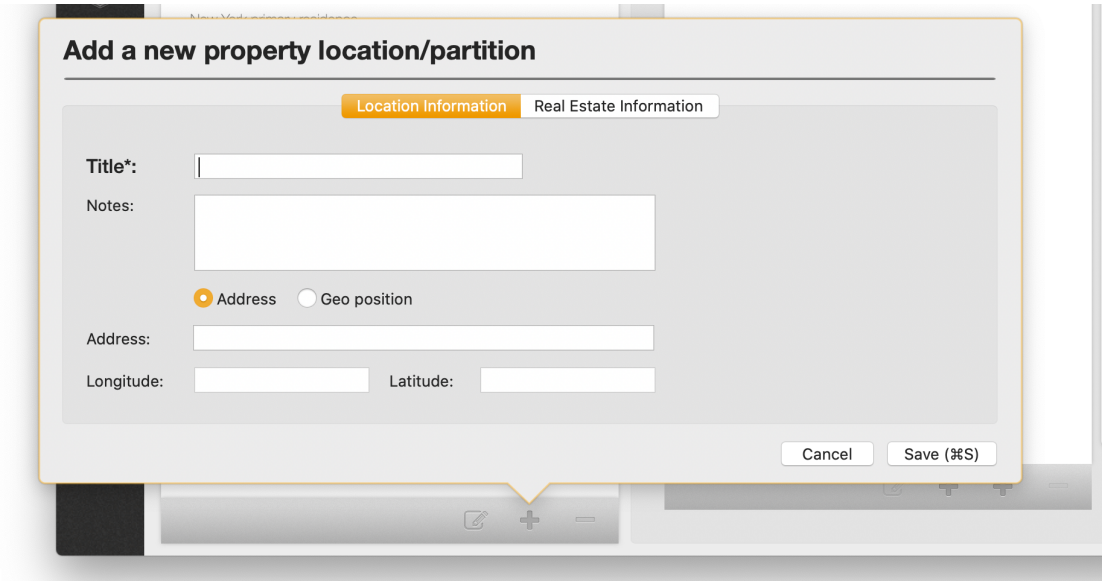
All records in the table are sorted by their name. To switch from ascending to descending sorting order and back, select the button at the top right corner of the table:

After you select a record in the table, on the right side of the table, the application will display a list of items at that location.

Currently selected record has a light-gray background. The light orange background marks a record that your cursor is currently hovering over.

Adding a new location

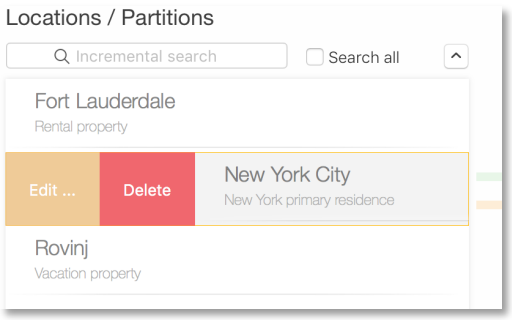
To add a new location, click on the 'Add' button. A new form will pop up and you will be able to enter new location's information. Once you are done, click on the 'Save' button.



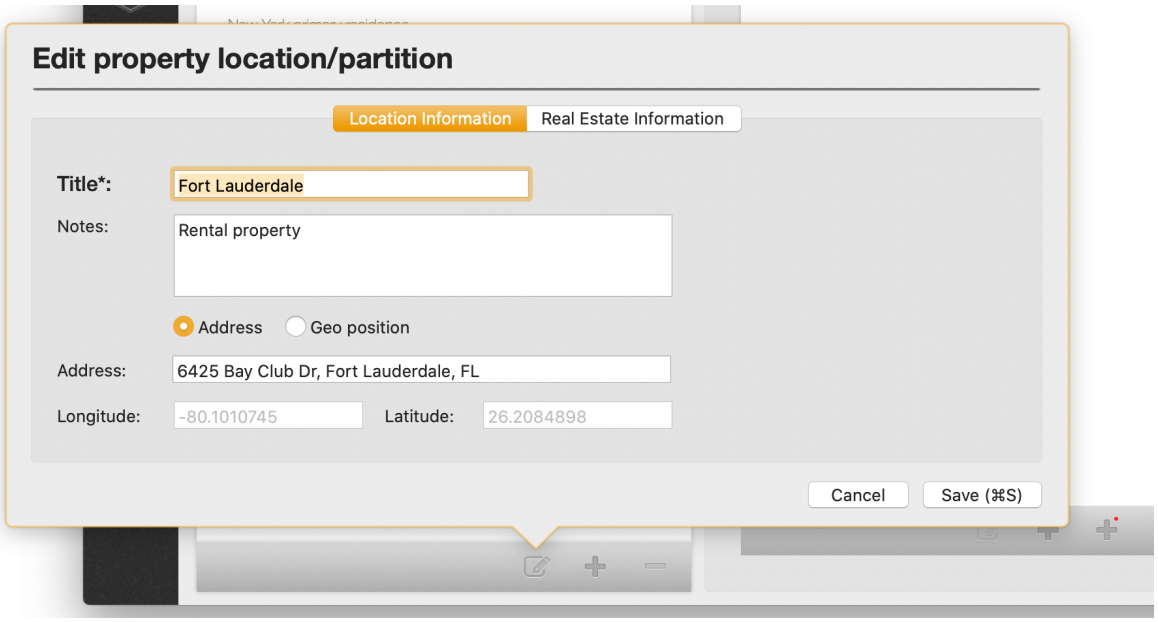
Editing existing location

There are several ways to edit an existing location:

- Double-click on the location row
- Select the location row and select the 'Edit' button
- Do a brief two finger swipe (if you have a trackpad) from left to right to display row buttons, select the 'Edit' button afterwards (see the image below).
- Do a full two finger swipe from left to right to open the edit form immediately.

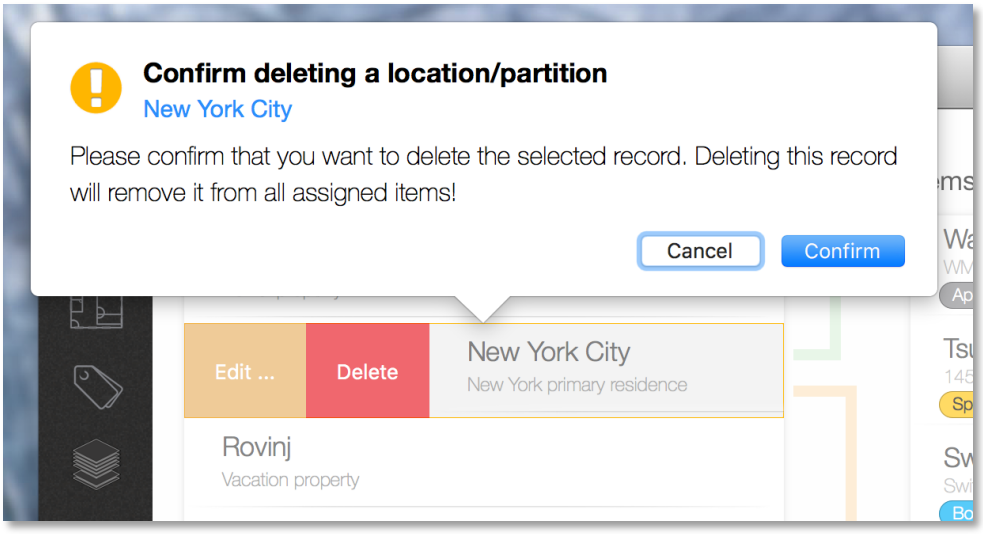


After that a location edit form will appear. Make your changes and click on the 'Save' button when you are done:



Deleting locations

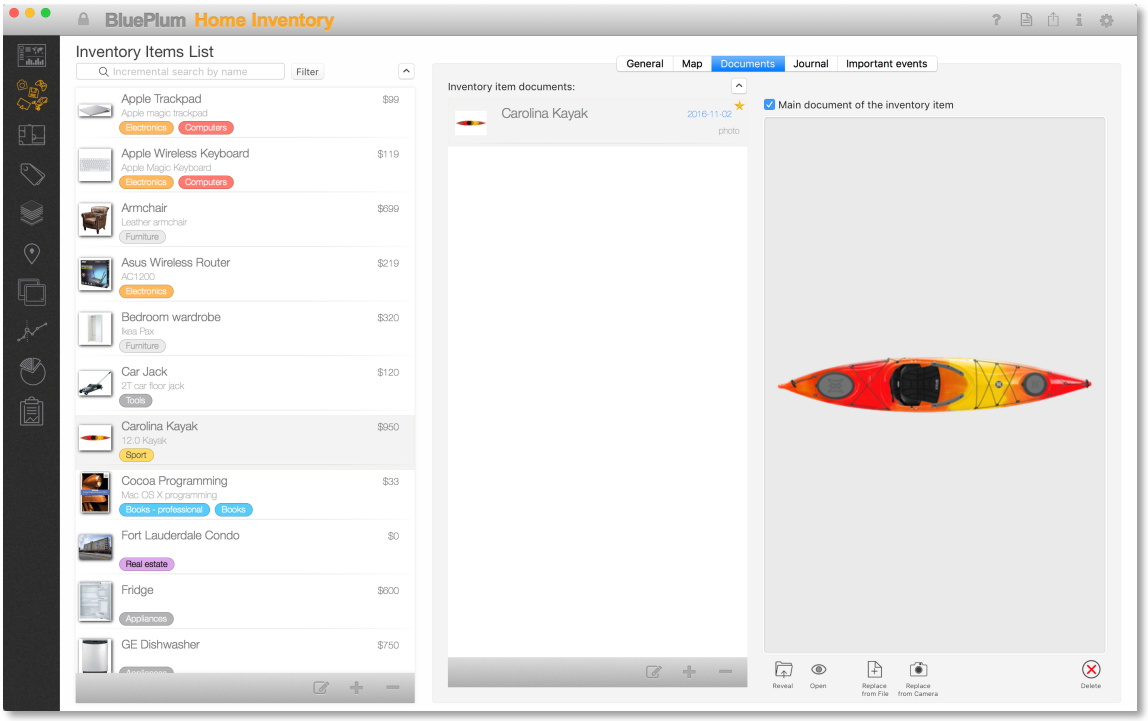
To delete a location, select it, click on the 'Delete' button or do a trackpad two-finger swipe from right to left. A warning message will ask you to confirm your action before the record is deleted.



After you delete a location from your inventory, all inventory items assigned to that location will not be assigned to any location.

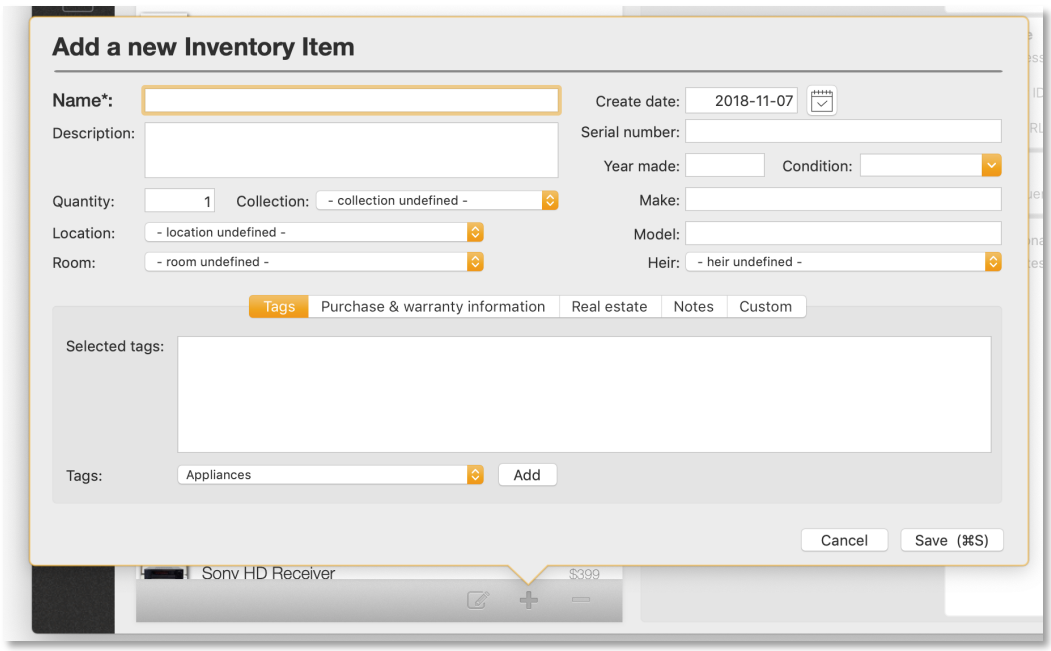
3.6 Adding new inventory items

After you have added your locations, rooms, collections and tags, you can start adding your inventory items. Select the 'Inventory items' sidebar button: or use the bulk photo import (see section 3.7.2)



The Inventory view is made up of a table containing all your items and selected item's details.

To add a new item, select the 'Add' button at the bottom of the items table.



In the 'Add a new Inventory Item' form you can type in all information you have for that item. You need to add at least item's name. Without that field you won't be able to save the new record.

The following is a list of all properties you can add for an item:

Name – name of the inventory item (mandatory)
Description – description of the item
Quantity – quantity of the same item you have in your home (default is 1)
Collection – select a collection from the drop-down menu or leave a default, undefined value
Location – select a location from the drop-down menu or leave unassigned
Room – select a room from the drop-down menu or leave unassigned
Heir – select an heir that should inherit that item
Serial number – serial number of the item
Year made – year when the item was made
Condition – describe the item's condition
Make – name of the company that made the item
Model – name of the item's model
Create Date - date when this item record was added to the inventory

Tags section
Selected tags – select a tag from the drop-down list and click on the 'Add' button to mark the item with that tag. You can add more than one tag to an item.

Optionally, you can add new tags just by typing a tag name in the 'Selected tags' field. Once you start typing, the application will show a small menu with all available tags matching what you typed. Select one of them and **hit the Return key** to add the tag to the inventory item.

If you type in a name of the tag that doesn't exist yet, after you **hit the Return key**, a new tag will be added to your application and the inventory item. That new tag will be saved to the application's database only if you hit the 'Save' button afterwards. If you cancel your changes by hitting the 'Cancel' button, all new tags you just added will be removed.

Purchase & warranty information section
Purchase date – select a purchase date from a pop-up calendar or type in the date.
Purchased from – type in a where you purchased the item from.
Purchase price – total purchase price in the system's currency. If you have used another currency, please re-calculate the amount. Please note that this is a total purchase price and not a unit price, i.e. this amount will not be multiplied by the quantity when reports are produced.
Warranty issuer – if you have a warranty, enter a name of the issuer.
Warranty contract – warranty contract number.
Warranty term – warranty term in months. The application will use the purchase date as a start date.
Track value over time – check this if you want to track the value of this item. If you do, the item will appear in the value log form.
Depreciable item – check that option if the item depreciates over time. If you do, depreciation rate field will appear.
Annual depreciation rate – type in annual depreciation rate. When you start logging item's value, the application will use this amount to estimate the remaining value of the item for you.

Real estate section

If the item is a real estate, you can fill-in real estate related information here.

Property address – address of the property
Zillow ID – Zillow ID
Zillow URL – Zillow URL. If you add Zillow URL you will be able to click on it from the item's details view and the application will open a web browser window with that URL selected.
Manager information – name of your property manager
Lot area – property lot area
Floor area – property floor area

Notes section
Additional notes – any additional note related to the item that you want to add.

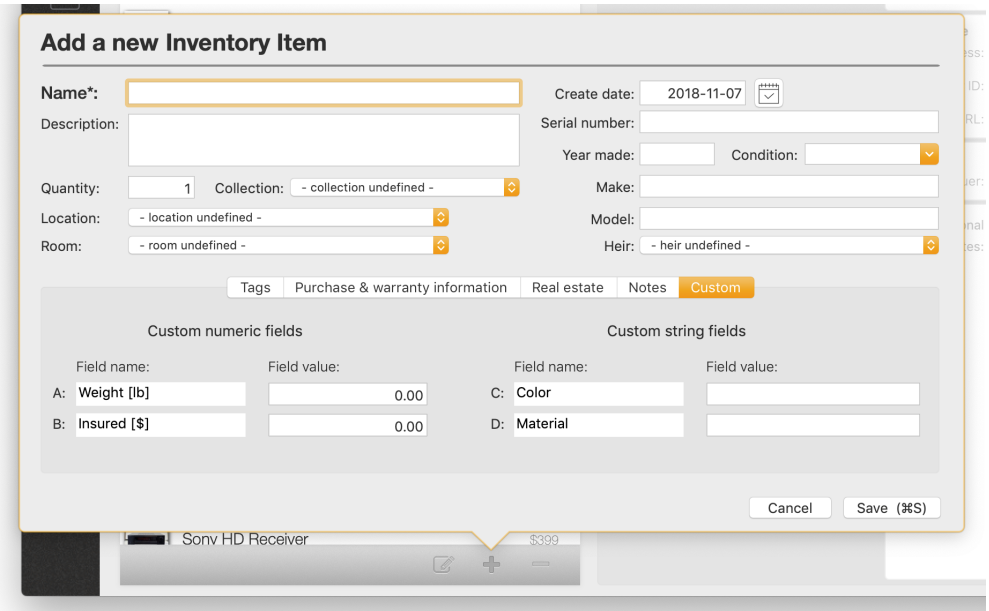
Once you are done typing in item's information, click on the Save button.

Note: The pop-up form's behaviour is set to disappear if you click outside of its content. If you do that, it will disappear as if you have clicked on the 'Cancel' button and your changes will not be saved.

After you save the item, it will appear selected in the item's table. At this point you will be able to add item's journal, events and photos/documents.

Custom section

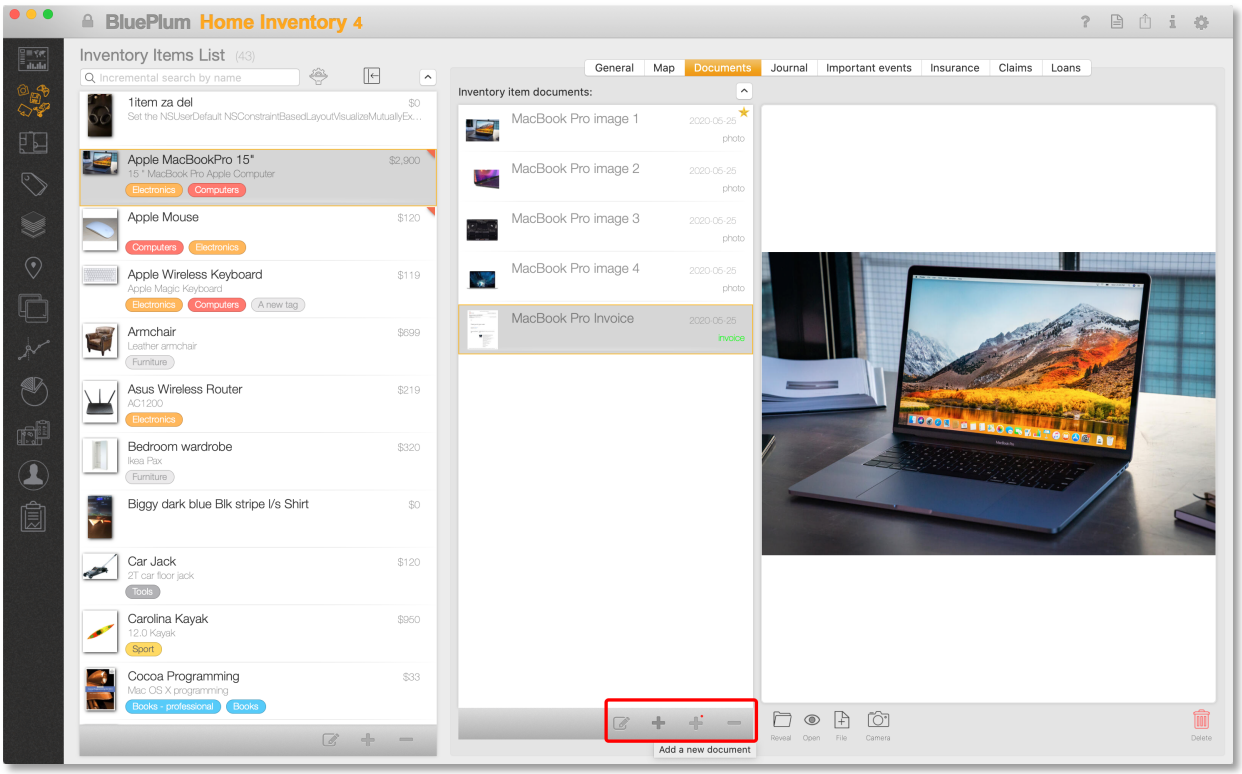
In case you have defined custom fields, this section lets you add values to these custom fields. You can have up to 2 numeric and 2 text custom fields. These fields can be used in some of inventory reports.



3.7 Working with inventory items

3.7.1 Adding photos and other documents

To add a new photo for a selected item, select the 'Documents' tab in the item's detail area:



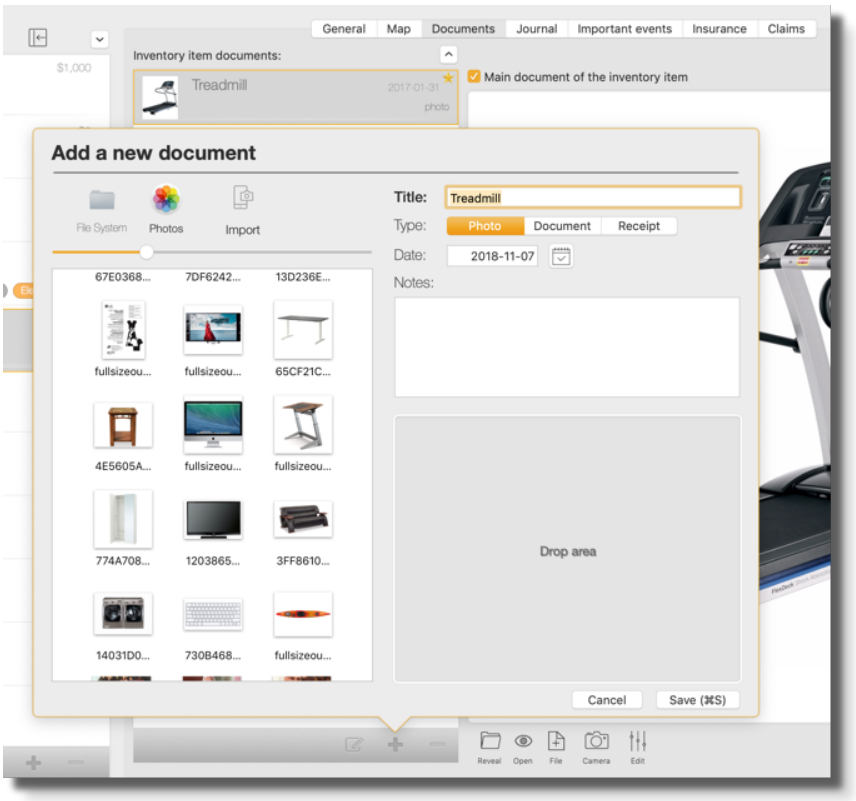
You will see another table – a table that lists all documents related to the selected item. If you select one of the documents, a preview will appear on the right side of the table.

To add a new document, select one of two 'Add' button at the bottom of the table.

- Add a new document … - add a new document from a file
- Add a new document from camera … - add a new document item based on an image you are going to take from a camera.

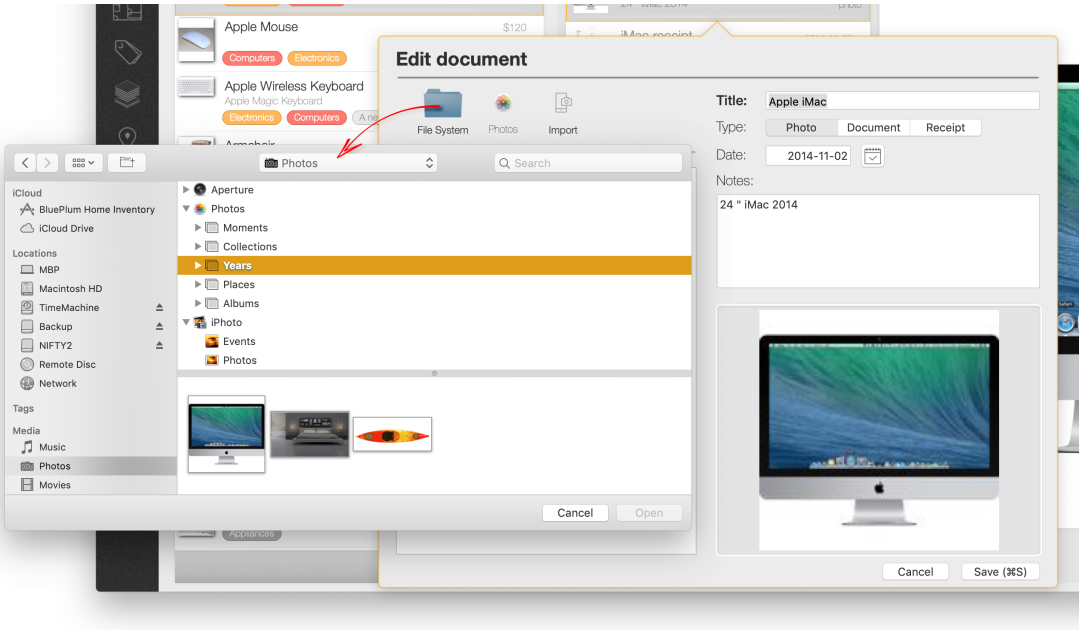
3.7.1.1 Add a new document …

This option will let you add a new document record and choose a photo/document from one of several sources:



3.7.1.2 *File system*

This option will open a standard 'File open' dialog. There, you will be able to find and select a file that you want to add to the selected inventory item. The application will make a copy of the file from the source location and store it to application's data folder.



Files you select from the standard 'File open' dialog could be images/documents located anywhere on your Mac, or images synchronized via iCloud from your iPhone (or another iOS device).

If you have images on your iPhone, have 'iCloud Photos' option of your iCloud account's setting turned ON, this is the preferred way to import your iPhone photos to the Home Inventory application.

3.7.1.3 Photos

This option will let you choose a photo that has already been added to your Mac's Photos application. This is a default option that lets you add images taken by one of your iOS devices (iPhones or iPads) that were synchronized with your Photos application.

(You can import the same photos through the previously mentioned File system' way if you select 'Photos' from the standard 'File open' form.)

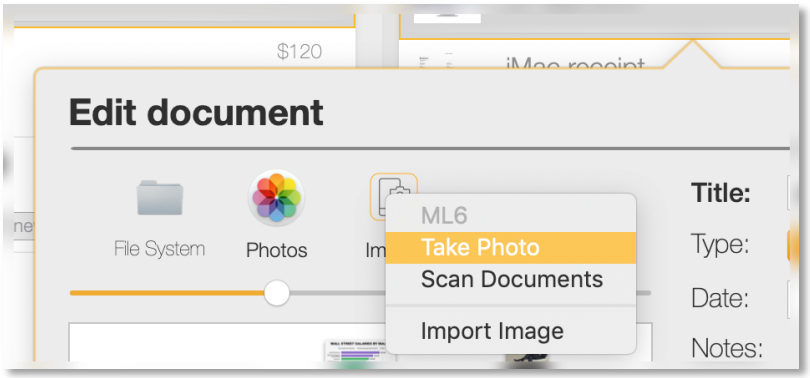
(For more information on how to synchronize your iPhone/iPad photos, see the Apple support site: https://support.apple.com/en-ca/HT201302 - Transfer photos and videos from your iPhone, iPad, or iPod touch).

3.7.1.4 Import / Continuity Camera

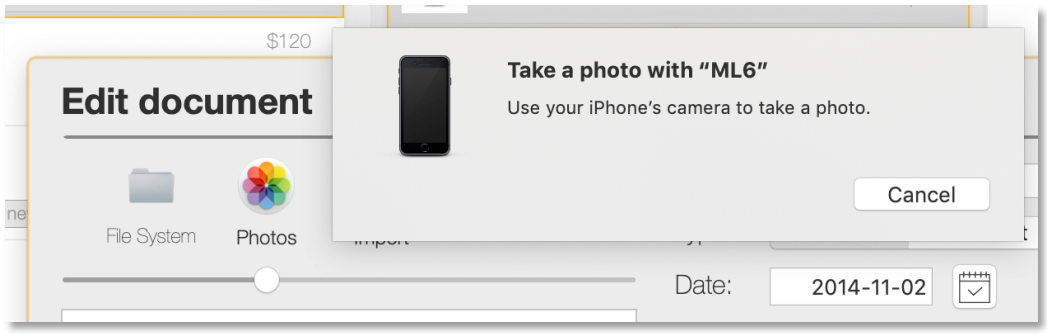
This feature requires MacOS Mojave and iOS devices running iOS 12. It lets you use your iPhone, iPad, or iPod touch to scan a document or take a picture of something nearby and transfer it instantly to the home inventory application.

If your Mac OS is older than Mojave, you won't be able to see the 'Import' button.

If you iPhone (or other iOS device) is nearby after you click on the 'Import' button, a menu with commands 'Take photo' and 'Scan documents' will show up:



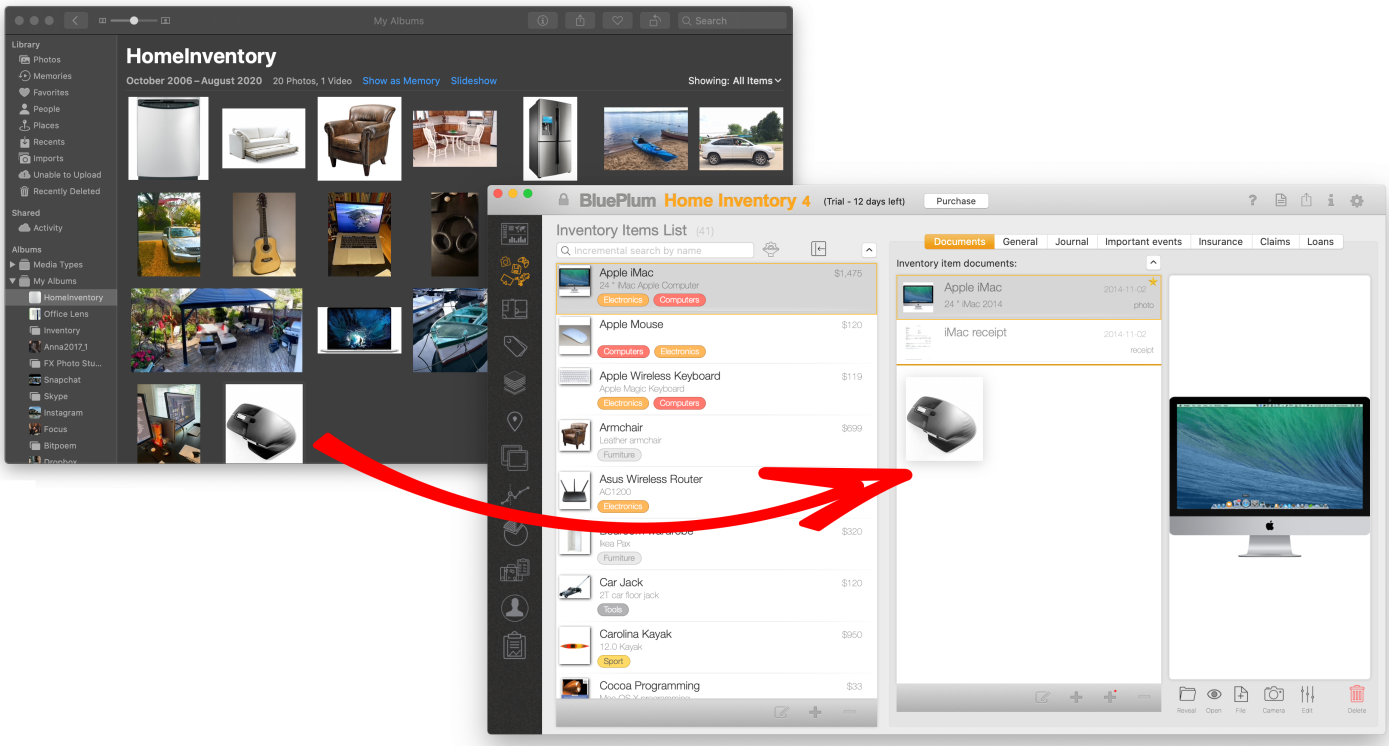
As soon as you select either of these two commands your iPhone's camera will turn on and you can take a photo or scan a document that you want to transfer directly to the Home Inventory application. While your phone's camera is working, the Home Inventory application will show the following message:



Once you take the photo, you would need to press the 'Use Photo' button. Once you do that, the photo will appear in your 'Edit/Add New Document' form.

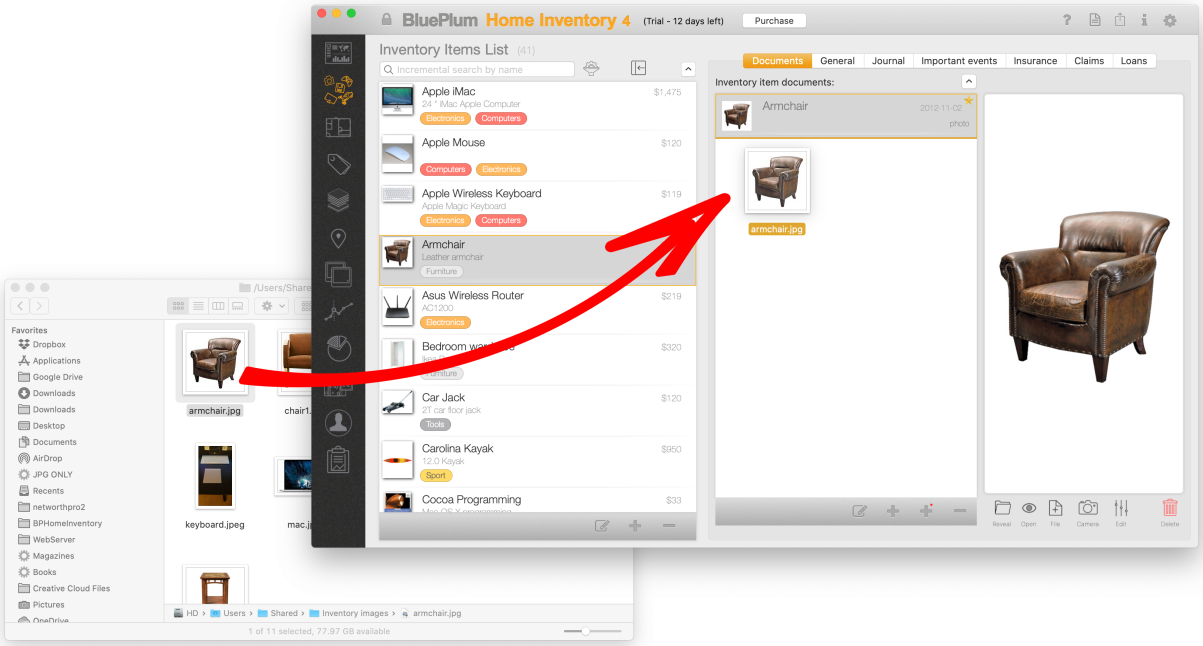
3.7.1.5 Drag & Drop - drag from Photos

You can drag images directly from the Photos application and drop them over the document list of an item. Once you do that, the application will create a new document record for that item and add the image to it:



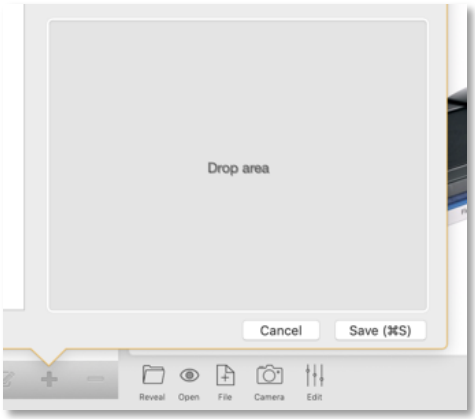
3.7.1.6 Drag & Drop - drag from the Finder

You can drag files directly from the Finder and drop them over the document list of an item. Once you do that, the application will create a new document record for that item and add the file to it:

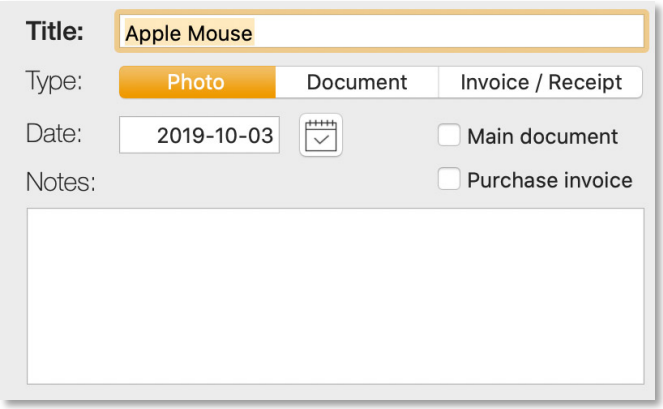


3.7.1.7 Drag & Drop to drop area

You can also drag a file from the Finder (folder view or Desktop) and drop it to the 'Drop area' section of the 'Add/Edit Document' form:



3.7.1.8 Main document and purchase invoice options



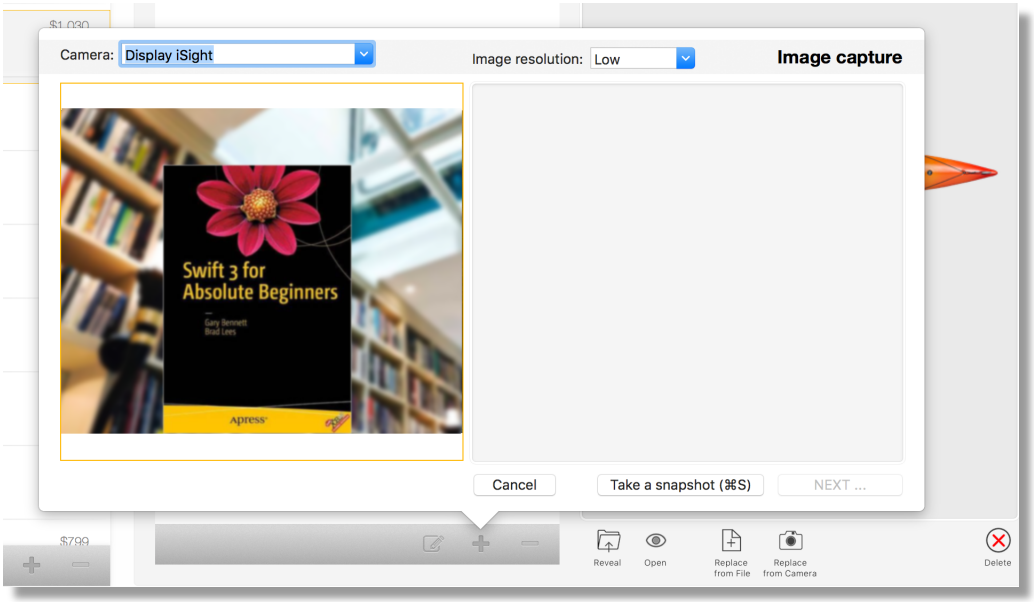
If you select the **'Main document'** option, the photo/document you are adding or editing, will show up as the thumbnail image in the inventory list table and its image will be included in the Comprehensive report. Only one document per item can be marked with that option. If you select the option for another document, the previous one will get that option cleared.

If you select the **'Purchase invoice**' option, the document is considered the main invoice document of that inventory item. If the 'Append purchase invoice' option of the Comprehensive report is selected, it will be added to the report in a separate page right after the inventory item's report page.

3.7.1.9 Add a new document from a camera …

To take a photo from your Mac's camera or another camera attached to your Mac, select the 'Add from camera' option. It will display a form that will let you choose a camera (in case you have more than one attached to your Mac) and it will let you take snapshots from the selected camera.

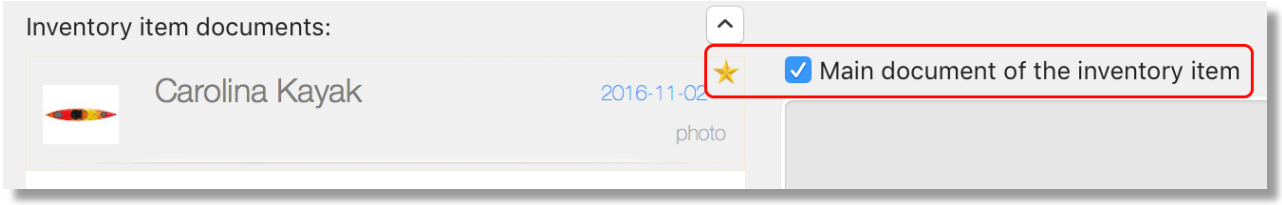
Before you take a snapshot make sure to select the resolution level of the snapshot. High resolution photos take more storage space.



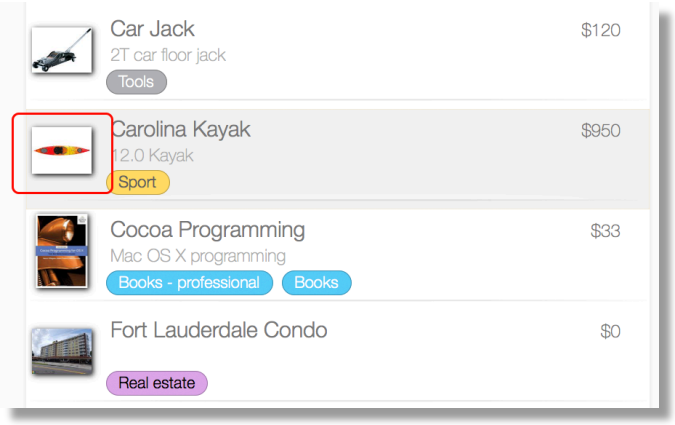
Once you take a snapshot and you want to keep it, click on the 'NEXT …' button to open the 'Documents' form. The same form as in two previous cases will open, but this time, your image from the camera will appear in the preview area.

3.7.1.10 Setting the main document of a selected item

By default, first document you add for an item will become the main one. The main document will be marked with a star:



A thumbnail photo of the main document will appear in the inventory item list as its thumbnail image:



Revealing files in the Finder

You can access any photo or document that you have stored to your home inventory. When you select a document record of an item, you will be able to reveal it in a Finder window if you click on the 'Reveal' button:

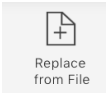
When you click on that button, a Finder window will open with your file/photo selected in it.

Opening a document

You can use an external application that has been registered to open a document by clicking on the 'Open' button:

If, for example, you selected user manual in a PDF file, clicking on the 'Open' button would open your default PDF viewer/editor application.

Replacing a document's file

To replace a file associated to the item's document, select the 'Replace from File' button: 

It will open again the standard 'File open' dialog that will let you choose another file. Once you select that file, it will replace the old one. To do the same, but choose a snapshot from a camera, select the 'Replace from Camera' button:

Deleting a document's file

To delete a file associated to item's document, but keep the document record itself, select the 'Delete' button:

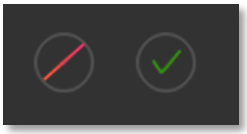
Editing a photo

To edit a photo, click on the 'Edit' button:

In the photo edit window, you will be able to perform some basic photo editing tasks:

- Crop the image
- Apply effects
- Rotate the image

When you crop or rotate the image, once you mark the crop area and/or move the angle slider to the desired angle, you will have to confirm or cancel the crop/rotate action with the following buttons located at the bottom right section of the window:

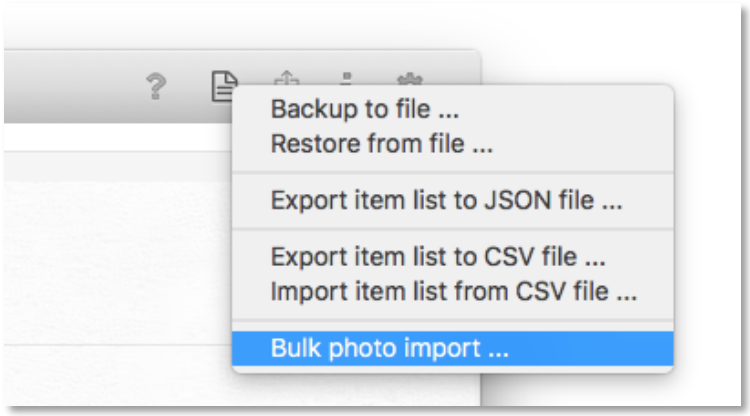


3.7.2 Bulk photo import

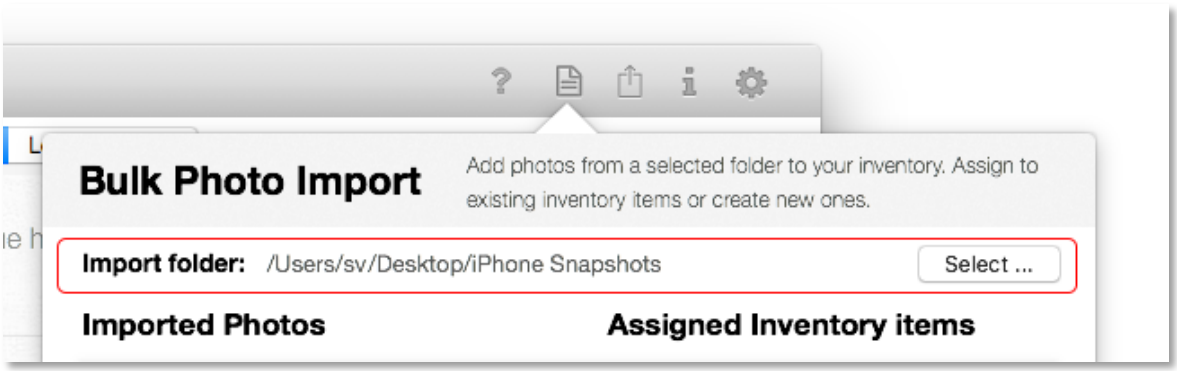
Bulk photo import feature lets you add large number of photos to your inventory in a quick way. It is probably the best way to start creating your inventory after you install the Home Inventory application.

It lets you import all photos from a single file directory (folder) on your Mac. For each photo in that folder, you can specify an existing inventory item or let the application create a new inventory item.

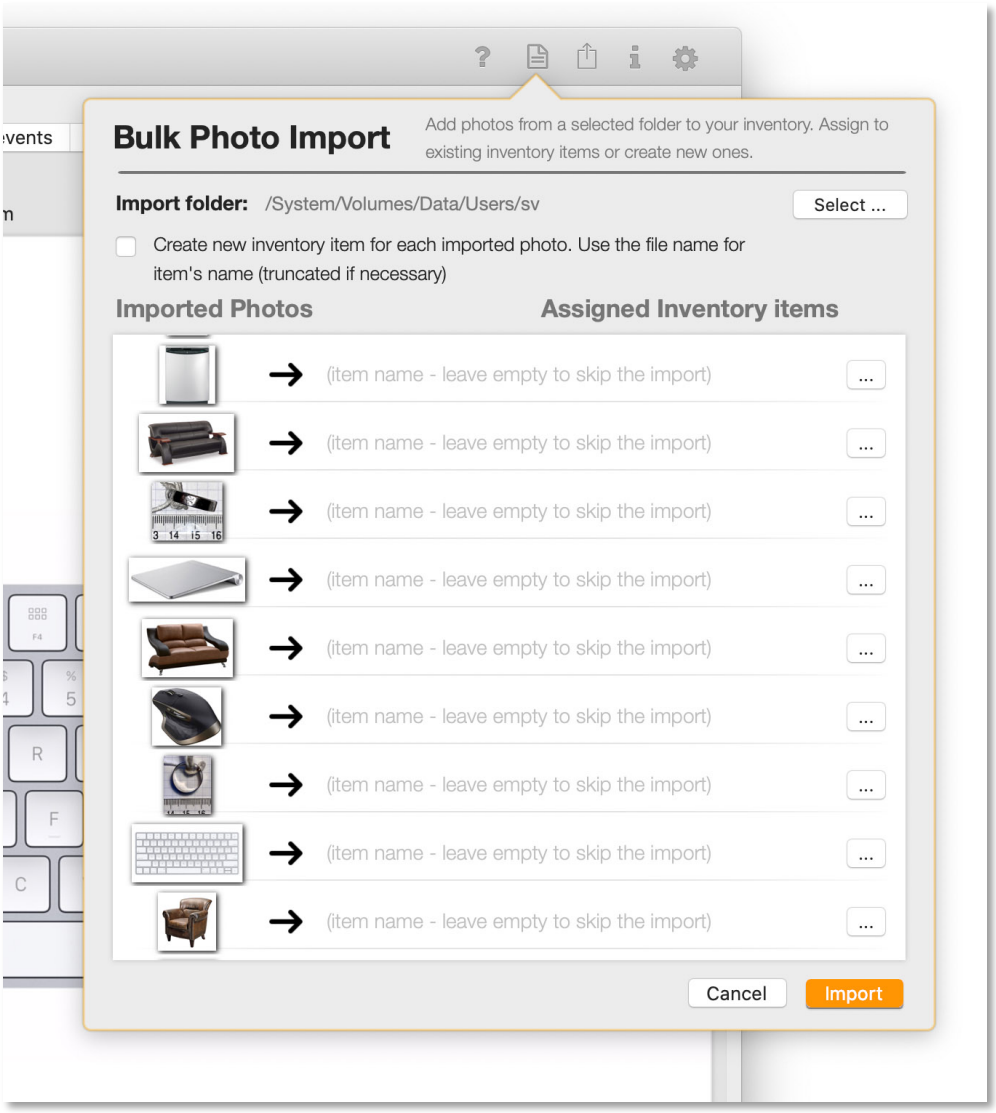
To start the bulk import, select the 'Bulk Photo Import' command from the 'Inventory Data' menu or click on the toolbar button ( ).



First, you need to select your import folder. Click on the 'Select …' button of the bulk import form to display standard 'file open' form and select a folder on your Mac.

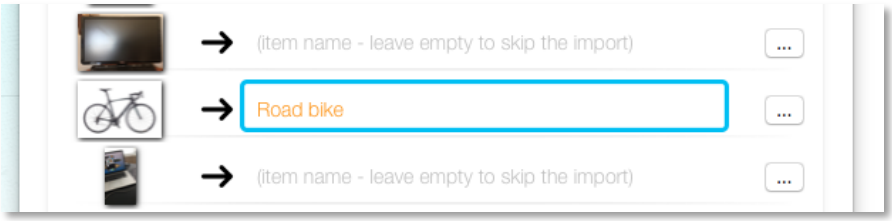


Once you select a folder with your images, bulk import will be populated with all images from that folder:



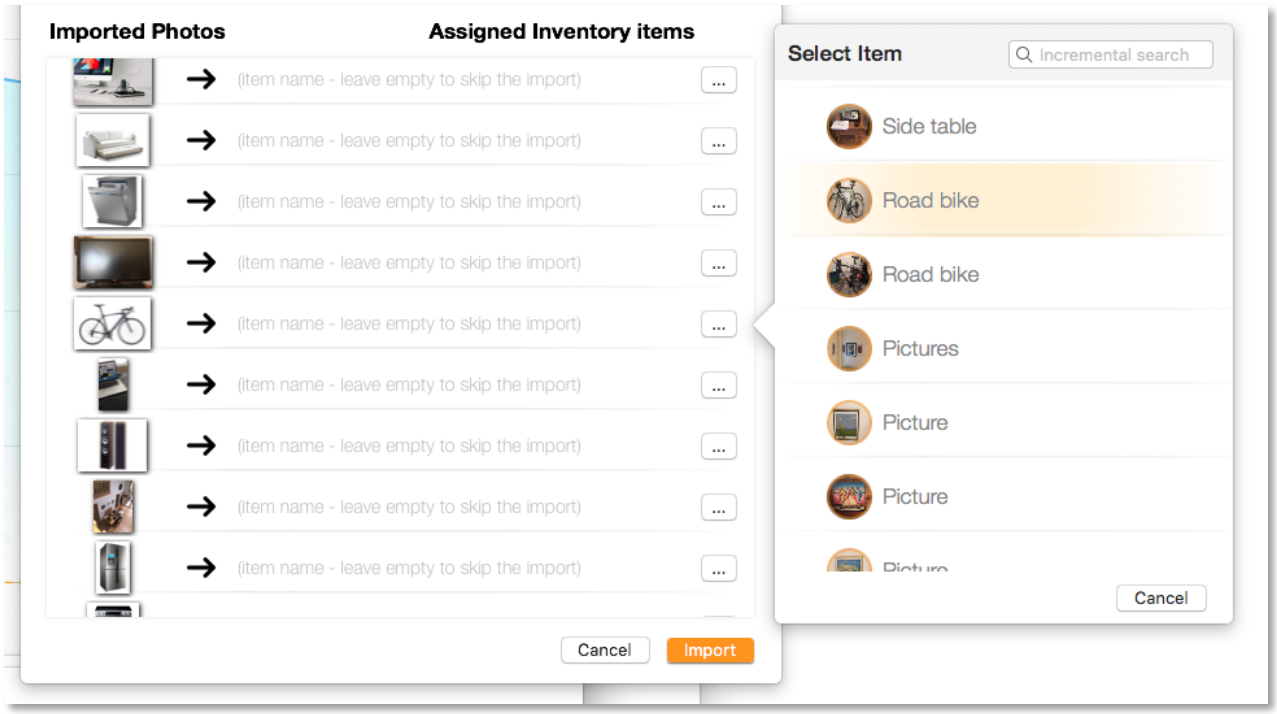
To assign a photo to an inventory item, either type in the item name in a field beside the photo or click on the ... button at the right side of the item's row:

- Typing in the item name – if an item with that exact name already exists in the inventory, the photo will be assigned to that item. If it doesn't, a new item will be added to your inventory and the photo assigned to it as well.

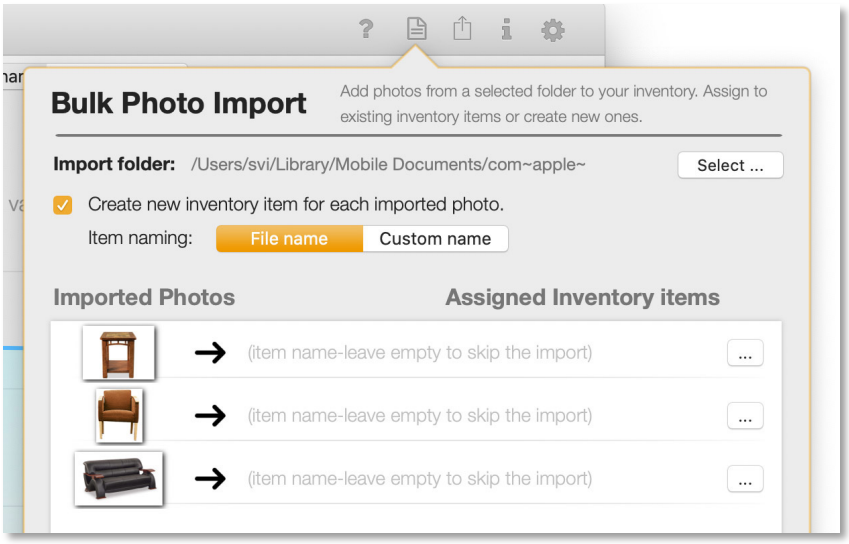


- Selecting an existing item from the item list – if you click on the ... button, a new form with a list of all your inventory items will appear to the right of the selected photo. You can scroll

through the list or type in the item name in the search bar at the top of the form.



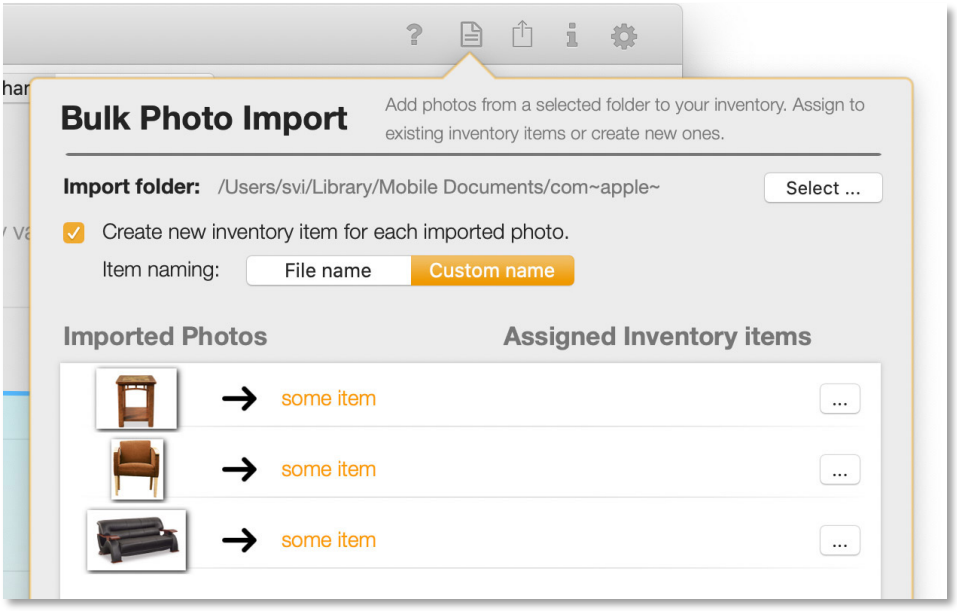
If you leave the item name empty (a default option), that photo will not be imported to your inventory unless option 'Create inventory item for each imported photo' was selected.



If you select that option, you will be able to choose between 'File name' and 'Custom name' options.

If you choose 'File name', a new inventory item will be created even for photos without a set name. Inventory name will be set to be the same as the name of the imported photo.

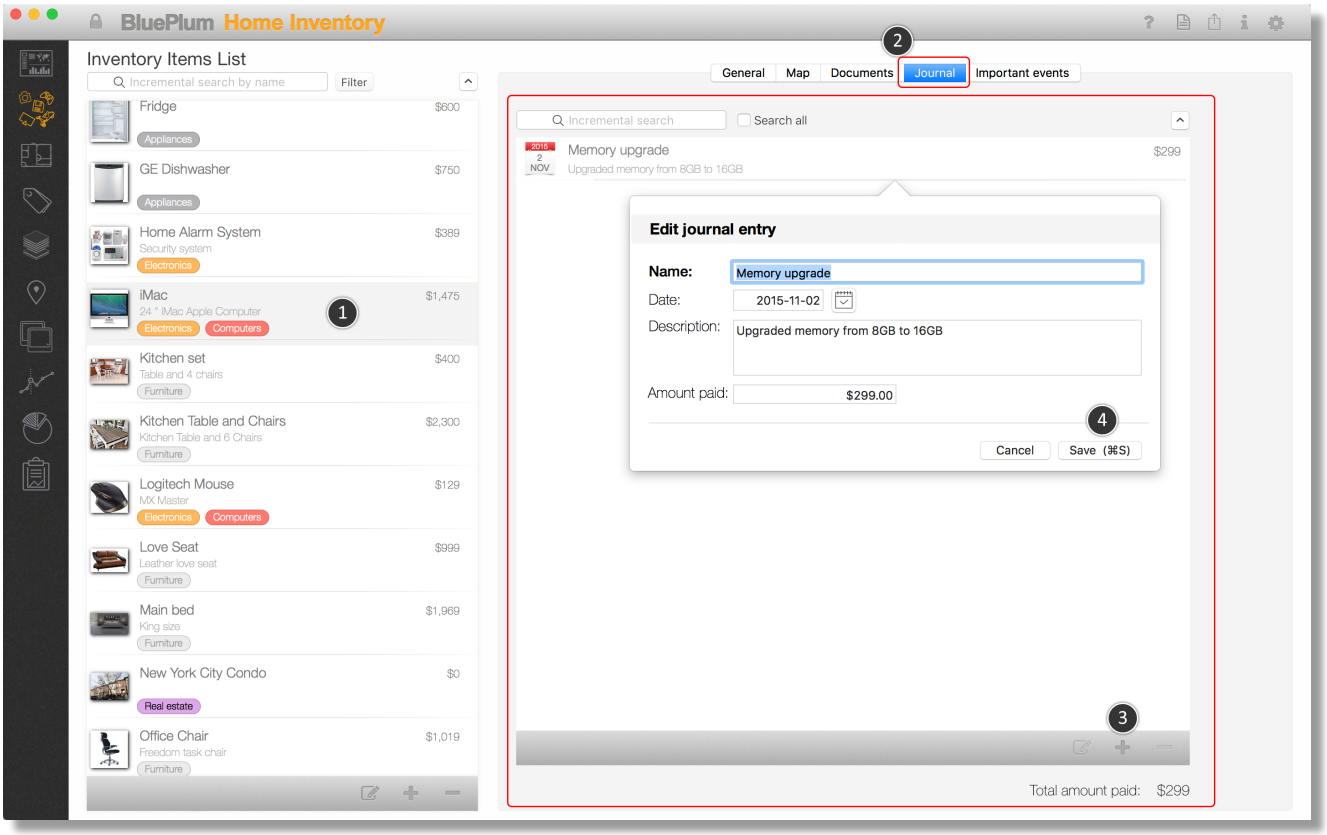
If you choose 'Custom name', you will be able to assign multiple photos/documents to the same named inventory item. In the example below, a new inventory item called 'some item' will be created and all photos you mark with that name will be assigned to that inventory item.



When you are done assigning photos to inventory items, click on the 'Import' button.

3.7.3 Adding journal entries

If you need to keep a journal related to an item (home furnace maintenance for example), you can do that from the 'Journal' tab of the item detail view.

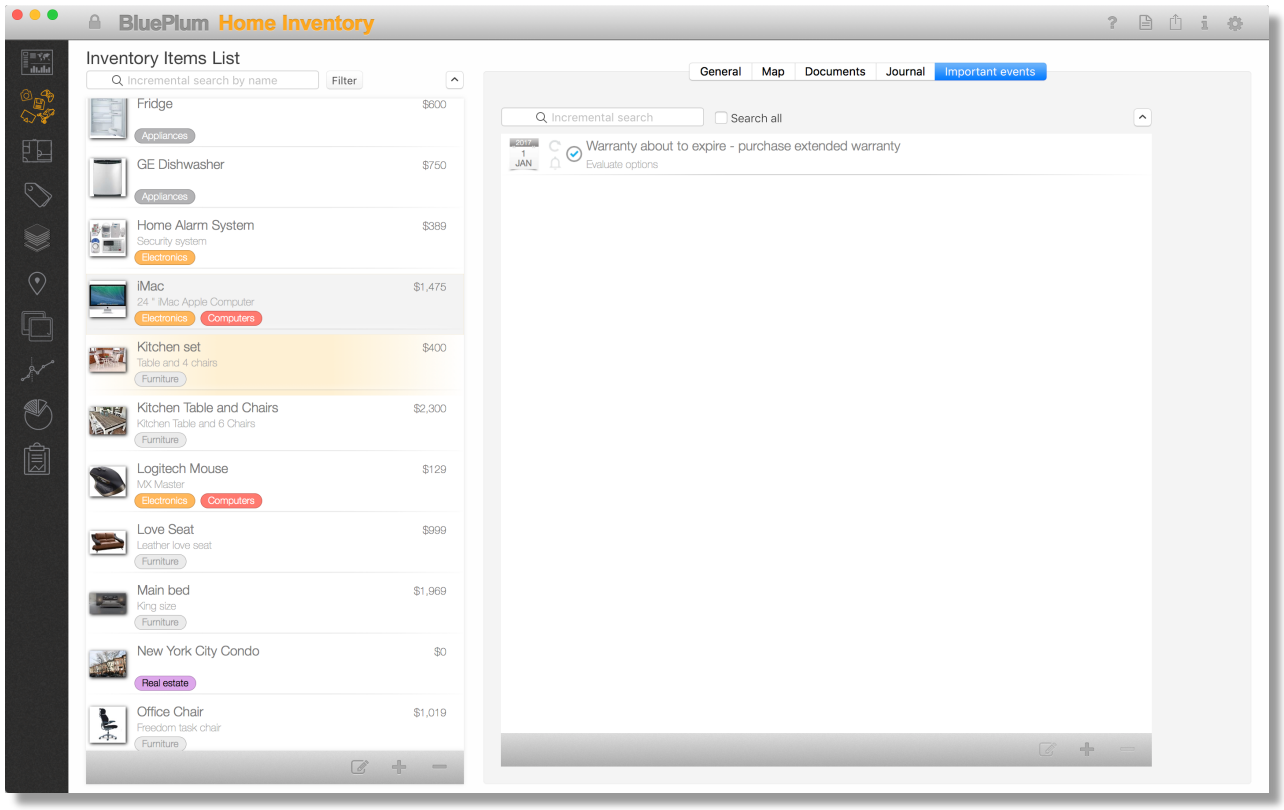


To add a Journal record, select the item (1), the Journal tab (2) and click on the 'Add' button (3). Once you are finished editing the journal entry, click on the 'Save' button (4).

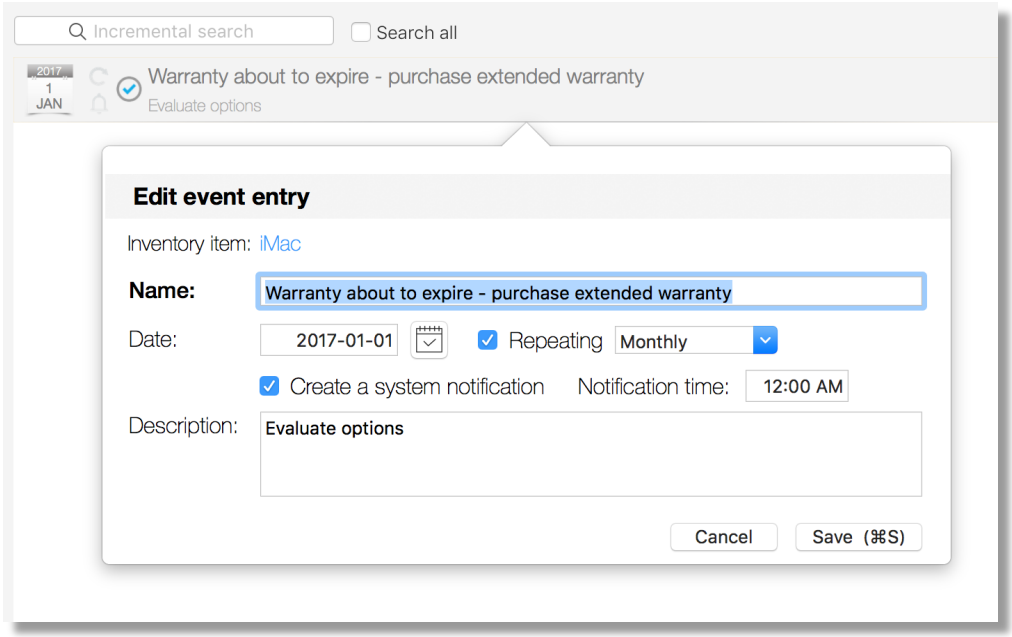
3.7.4 Adding events

To add an event, select the 'Important events' tab of the item detail view.

Added events will be visible in the table of events related to a selected item and in the events table of the dashboard view. The dashboard view will display events from all your items.



To add a new event, select the 'Add' button at the bottom of the events table:



Name – name of the event (mandatory)

Date – due date of the event

Repeating – Check this if your event is recurring. If you do, you will need to specify event period (monthly yearly, …)

Create system notification – check that option if you want to create a system notification as well. If you do, Mac's notification center will display event's notification at the specified time and date.

Notification time – a time of the notification in case 'Create a system notification' was checked.

Description – generic text field that lets you write more details related to your event.

Each event row will contain three icons beside the event date:

Icon marking recurring events. For non-recurring events the icon will be grayed out.

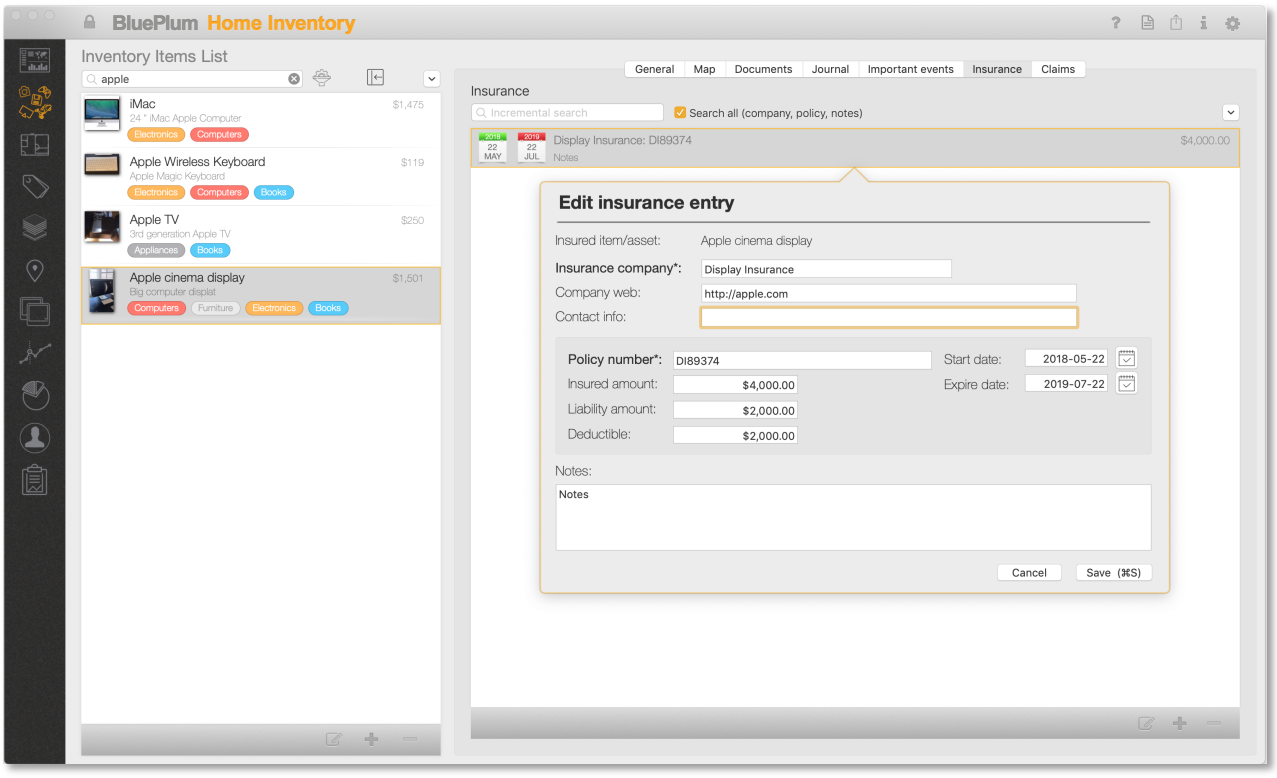
Icon marking events that have the 'system notification' option checked.

Icon marking acknowledged event. Unacknowledged events will not have the checkmark icon.

Acknowledged events can be filtered out from the main events dashboard table.

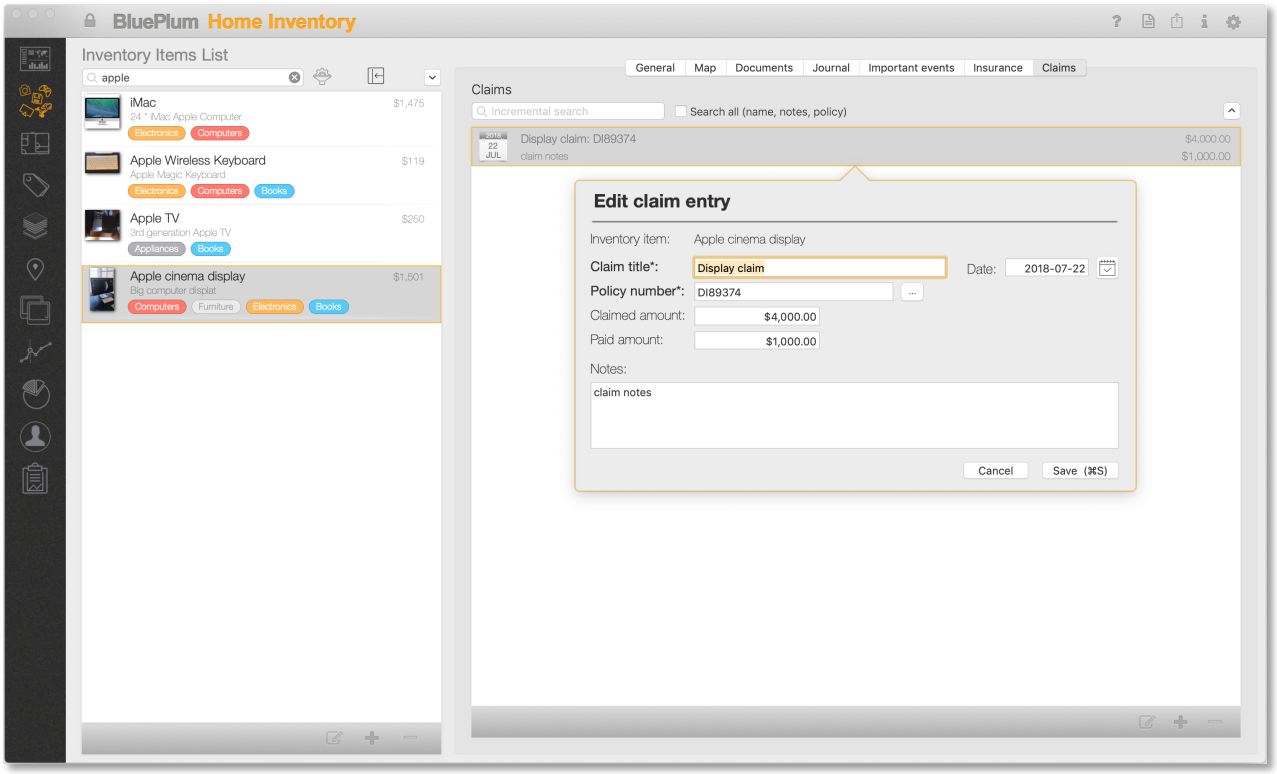
3.7.5 Adding item insurance information

If you have an insurance policy associated with an inventory item, you can add it in the 'Insurance' section:

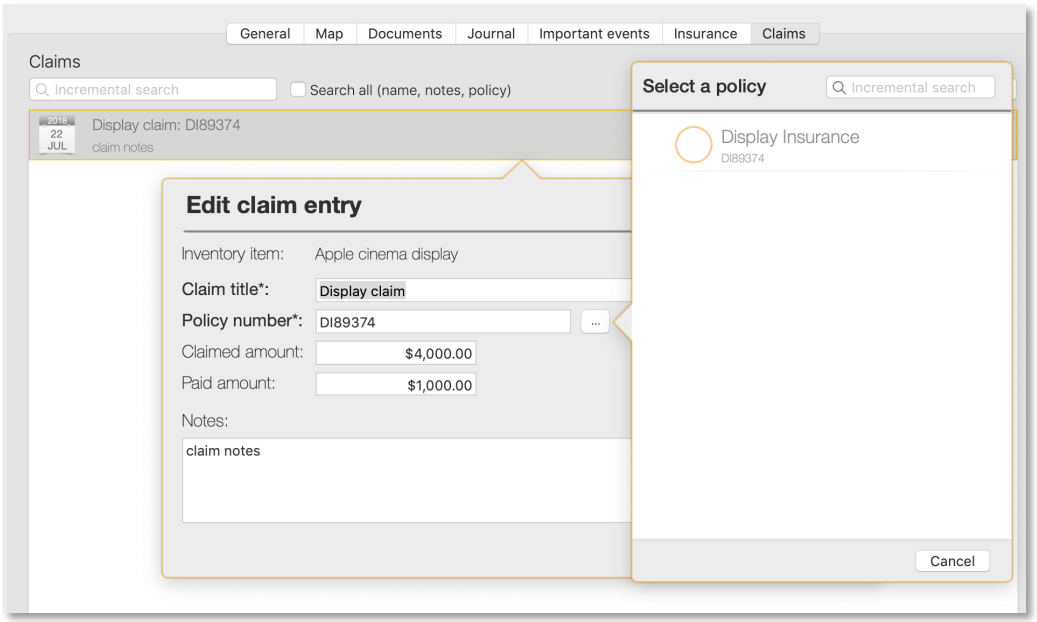


3.7.6 Adding item insurance claim records

If you made claims against an item's insurance policy, you can add it in the 'Claims' section:



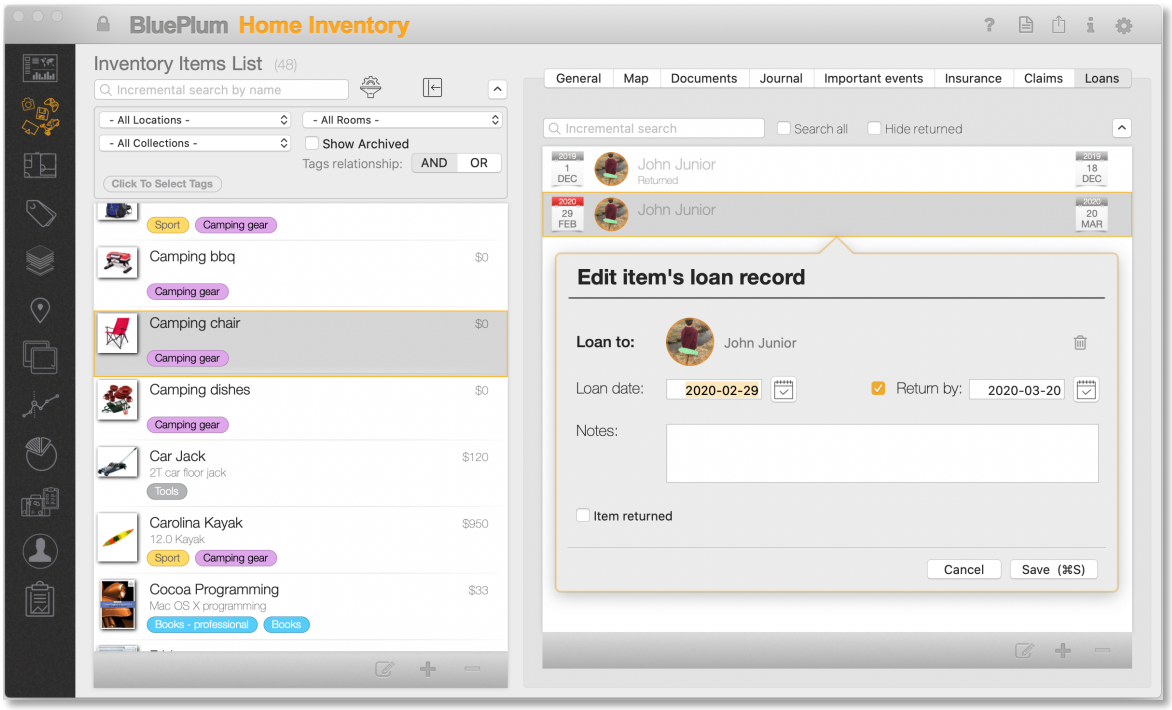
To select the related policy number, click on the ... button besides the 'Policy number' field:



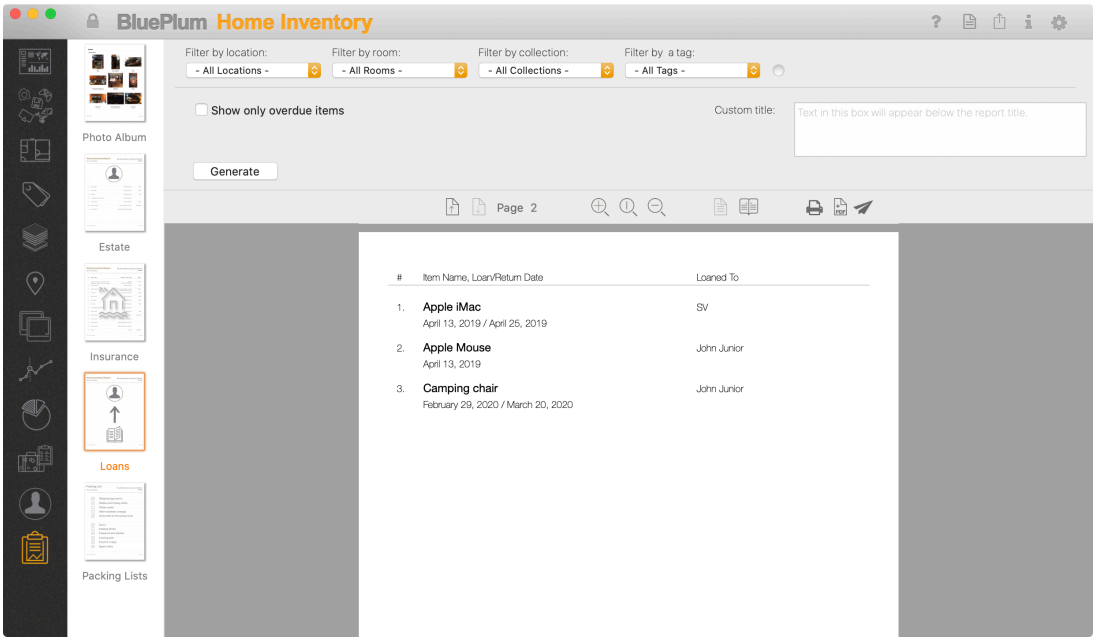
3.7.7 Track loaned items

Do you remember which one of your friends or relatives has that tool you are looking for right now? Use the 'Loans' section to keep track of all your loaned items.

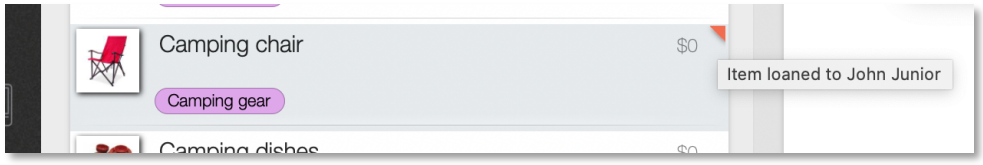
To add a loan record, select the item you are lending to someone, click on the 'Loans' tab of that item and click on the '+' button to add a new loan record:



Select a person from your contact list, set the loan date and, optionally, the return date. Once you save the record you will be able to create a report of all your loaned items.

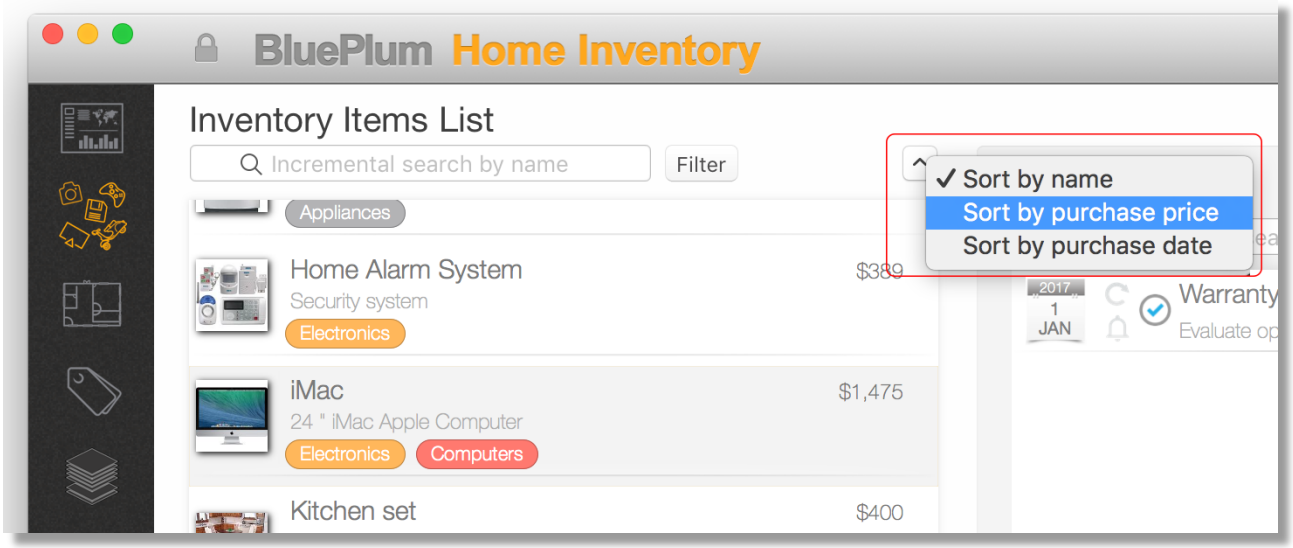


Furthermore, in the inventory list, loaned items will be marked with a small orange tag. If you hover your mouse over that tag you will be able to see more information:



3.7.8 Sorting of inventory items

To change the sorting criteria of inventory items in their table, right mouse-click on the sort order button located at the top right corner of the table:



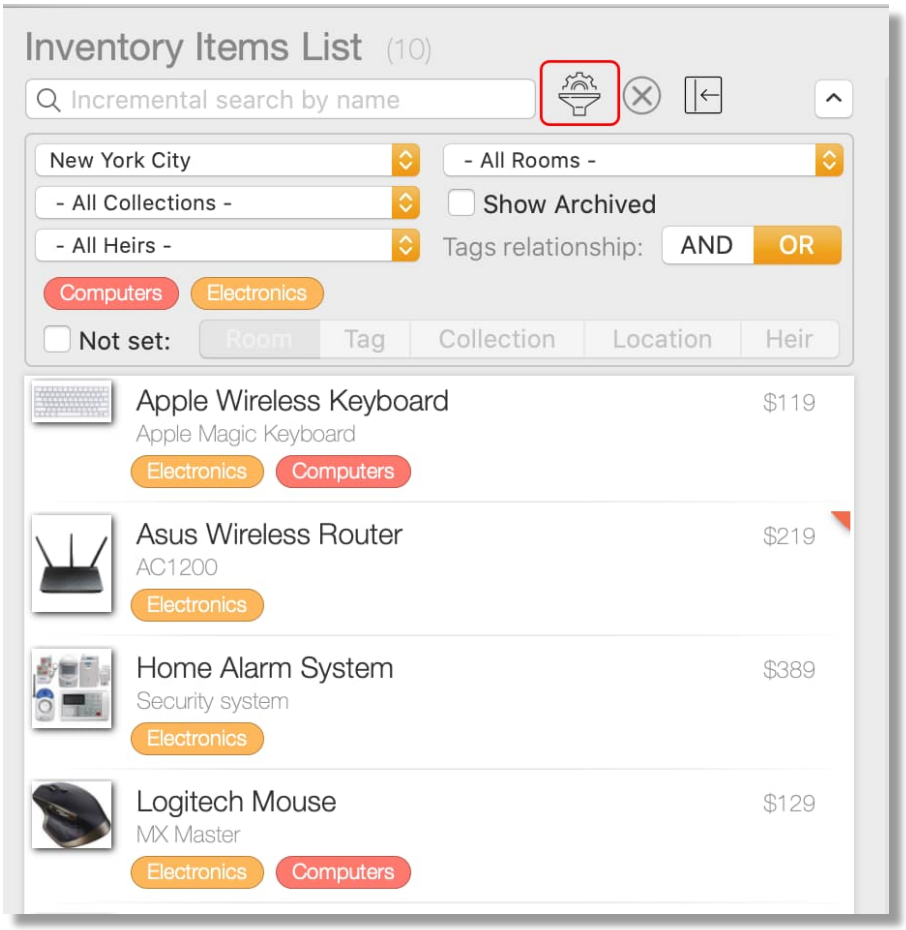
After you select the sorting criteria you want, the menu will disappear. If you left-mouse-click on the sort order button, you will switch between ascending and descending sorting orders.

3.7.9 Filtering of inventory items

To search a specific item or display only items related to a location, room, collection or a tag, you need to apply a filter.

If you are just going to search for an item based on its name, type in portion of that name in the 'incremental search by name' field, and the application will narrow down a list of displayed items to ones that match your input.

To apply a filter, select the 'Filter' button and define your filter:



Your item list will filter out unwanted items as soon as you change any of filtering options. In the above example, the list displays only items tagged with 'Computers' or 'Electronics' tags. If you select a location from the 'Location' drop-down list, further filtering will happen – only items tagged with the 'Computer' tag from that selected location will be displayed in the list.

If you select 'Only items missing' option, the application will display only inventory items that don't have the selected category set. That way you can check if you forgot to assign a location, room, collection or tags to some inventory items.

Now, you can return to the list and keep working only on items that are displayed.

If you want to remove all filters, select the ‘Clear All’ button from the filter selection’s pop up form.

Filtering options:

- By location/property

- By room

- By collection

- By assigned heir

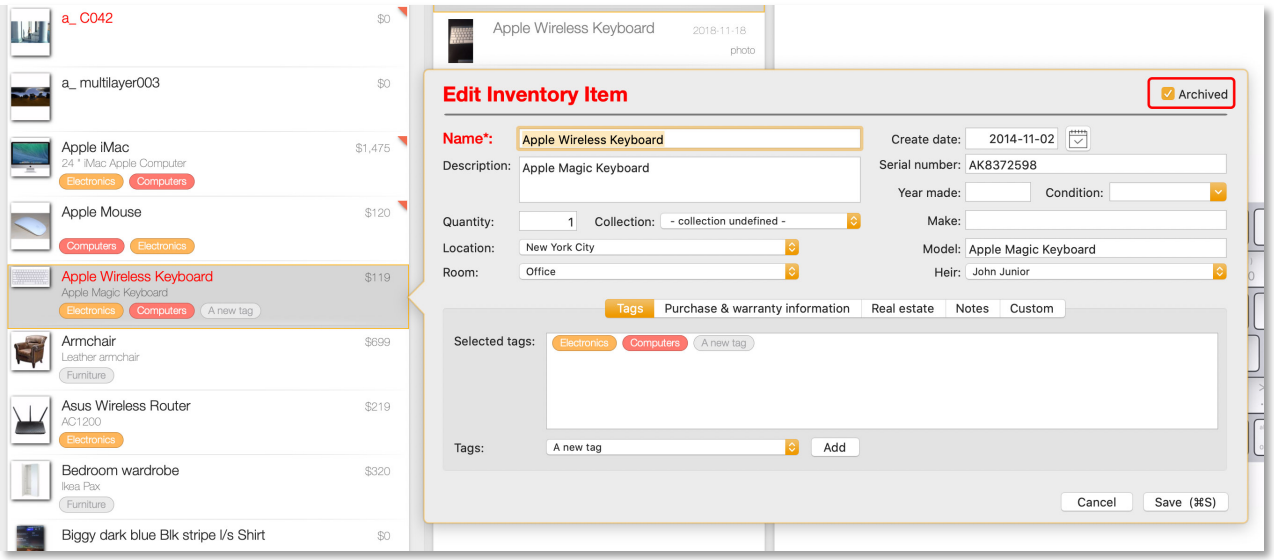
- By tags. If you select multiple tags, you can choose whether you want to list items that were tagged by all selected tags (AND tag relationship) or items that have at least one of selected tags (OR tag relationship)

- By archived state. If you check the 'Show archived' option, the list will include even inventory items you marked as 'Archived'. By default, archived items are not displayed in the main inventory item list (see more about archived items in the section 3.7.10).

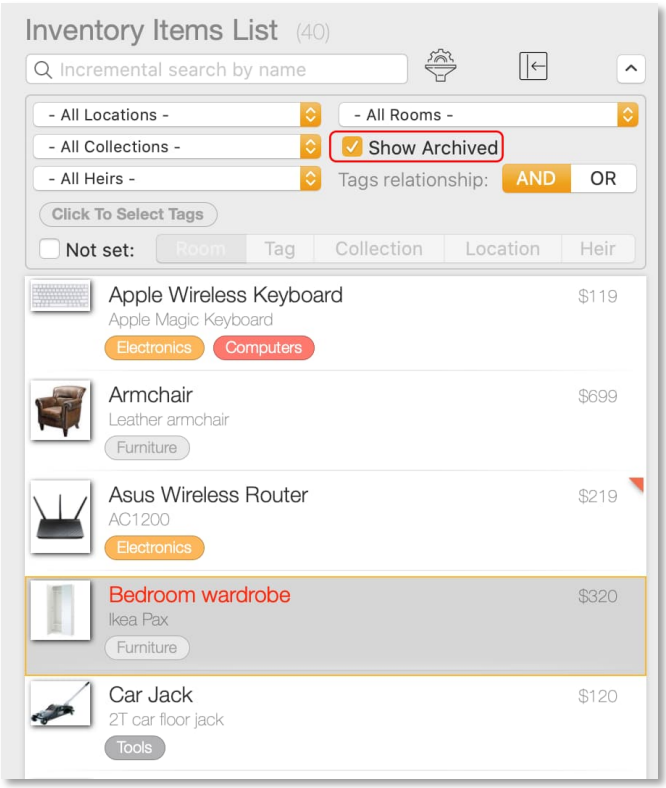
- Not set. If that option is checked, you can select whether you want to display only items that have no location, room, collection or heir assigned to it.

3.7.10 Archiving inventory items

If you sell or dispose of an inventory item, but still want to keep it in the database, and you don't want to include that item in any of your reports, check the item's 'Archived' option:



Once you mark an item as 'archived', that item's name will show up red in the item list, it won't be included in any of your reports and it won't show up when you try to add a new monthly inventory value log. To display archived items in the inventory list, select the 'Show Archived' option in the inventory list filter:



3.7.11 Moving photos between items

If you want to move assigned inventory item documents or photos from one item to another one, you can do that in two ways:

- Move all documents/photos from one item to another one
- Move individual documents/photos from one item to another one

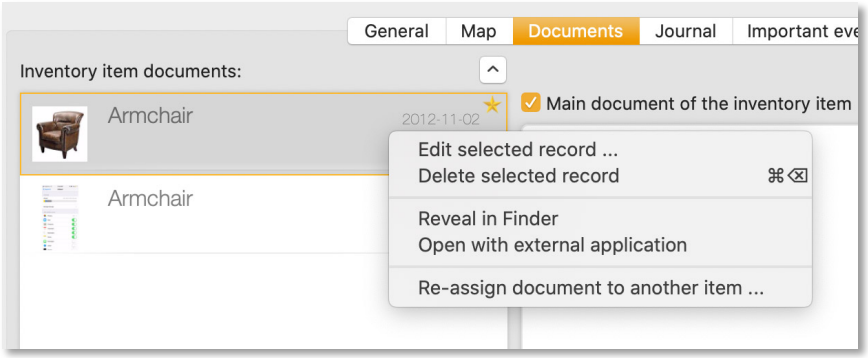
3.7.11.1 Move all documents/photos from one item to another one

Select the item you want to move photos from and show its context menu (Control+Click or right mouse click). Select the 'Re-assign all documents to another item ...' command from the menu.

Select the destination inventory item from the displayed popup and click the 'Assign' button to complete the operation.

3.7.11.2 Move individual documents/photos from one item to another one

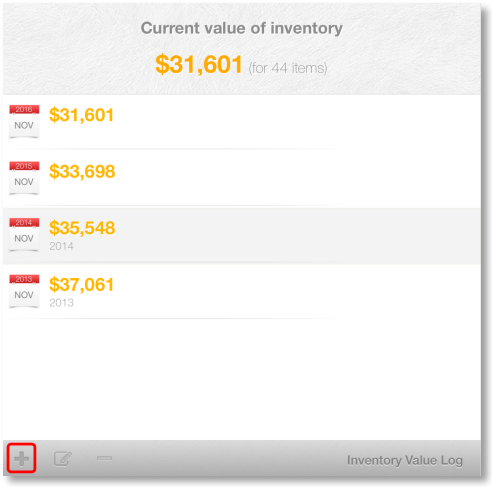
To move a single document to another item, select that document and display its context menu (Control+Click or right mouse click). Select the 'Re-assign document to another item ...' menu command and select the destination item from the popup's item list. Once you have selected the destination item, click on the 'Assign' button to complete the operation.



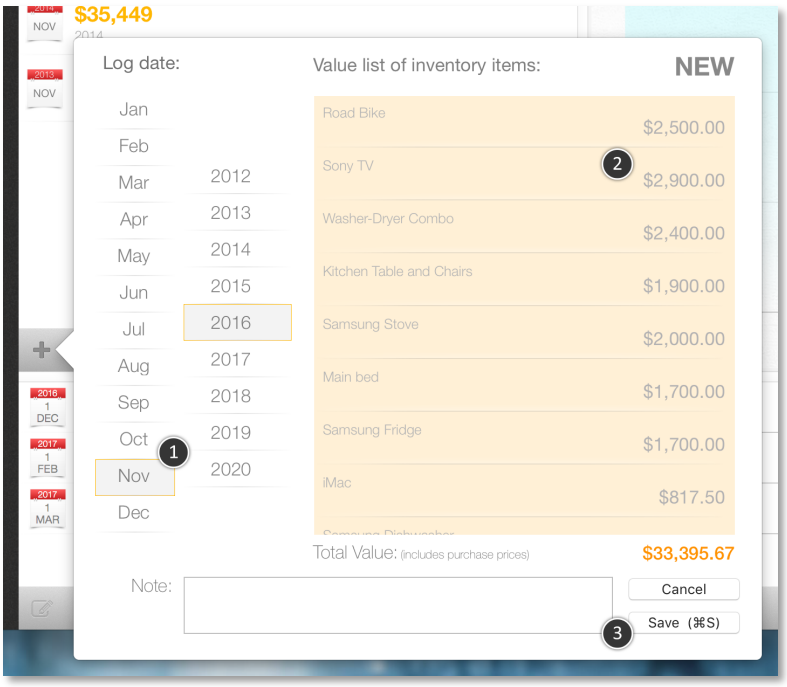
3.8 Periodic inventory value logging

It would be a good idea to update estimated values of all your inventory items from time to time. A good time for such an exercise would be when you need to update or pay your home insurance policy.

Our application lets you do that easy. On the Dashboard view, select the 'Add' button of the 'Inventory Value Log' table:



The form that will pop up will contain all inventory items for which you have selected the 'Track value over time' option. By default, that option is turned on when you create a new inventory item.



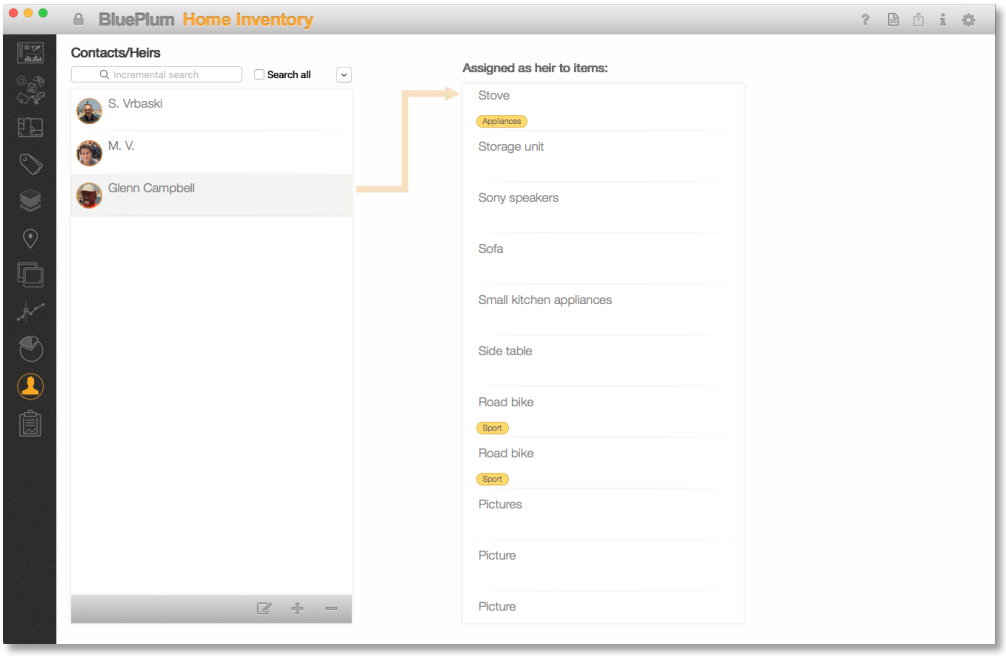
First, select the month and year (1) of the log (you cannot select a day since logging you inventory value more often than once a month is not necessary).

Next, for each inventory item that you think needs to change, update the estimated value (2). Items for which you have set an annual depreciation rate will already have a new value.

Once you are done, click on the Save button to create the new value log record. A new row in the value log table will appear and a new data point in the value history chart will be added as well.

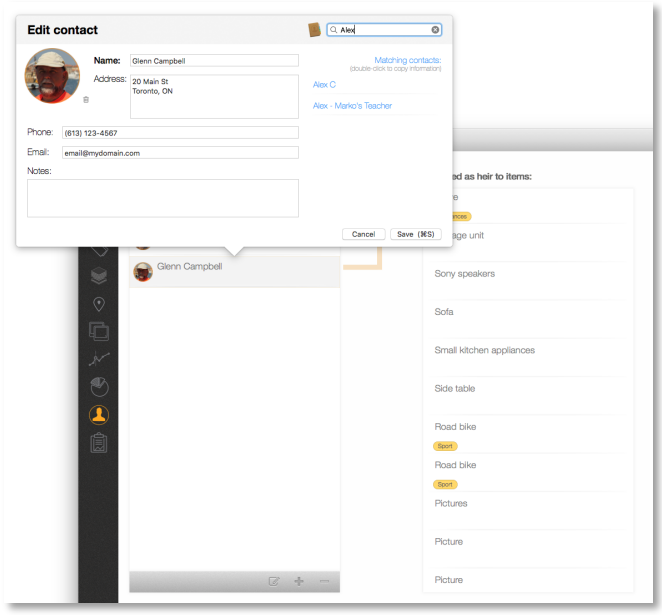
3.9 Heirs and estate planning

First step to your estate planning with the Home Inventory application is to add your heirs through the contact manager page:



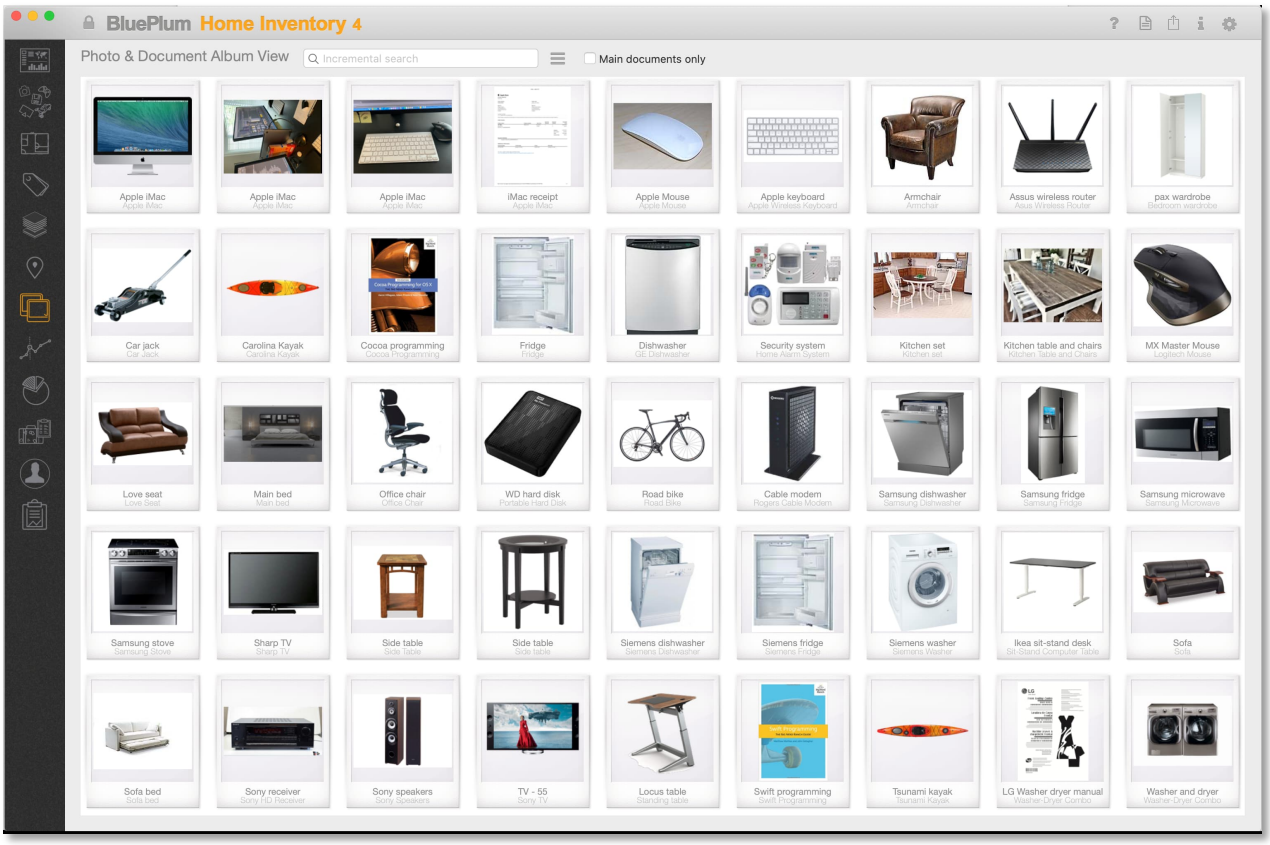
Once you have added your heirs, you can go through each inventory item in your data and assign an heir to it.

When you add your heirs through the contact manager, you can use your existing contacts from the address book application. Just start typing a name of your heir in the search bar (see the snapshot below) and a list of matching contacts will appear. Select the contact you need to add from the list and click on the '<' button to transfer contact's information to the Home Inventory application:



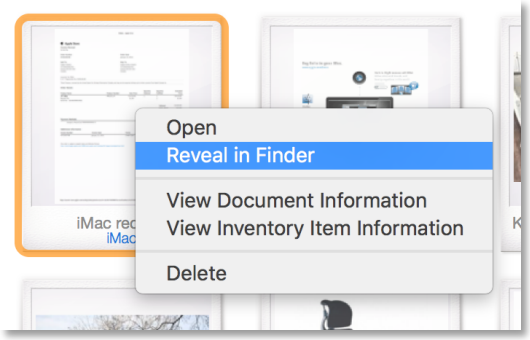
3.10 Photo & Document Album View

To display the photo album view, select the 'photo album' sidebar button:



All photos, documents and receipts will be visible in the album. Each item in the album is made up of the file's thumbnail image, document's name and inventory item's name that contains the image's document:

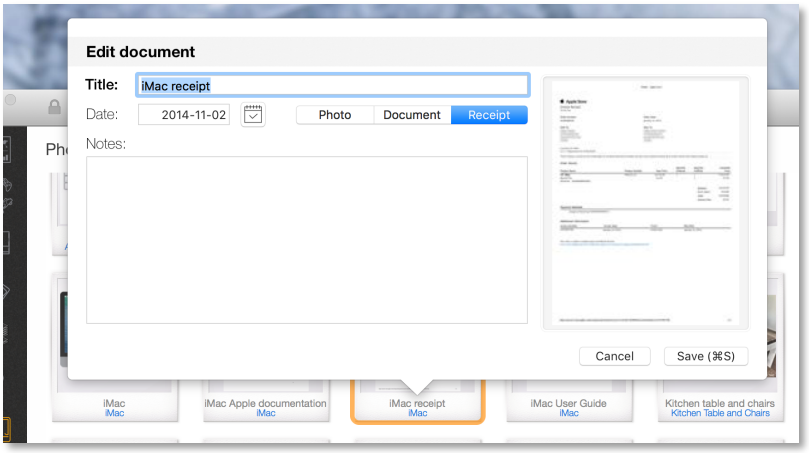
When you select one document in the photo album and right-mouse click on it, you will get a context menu with several options:



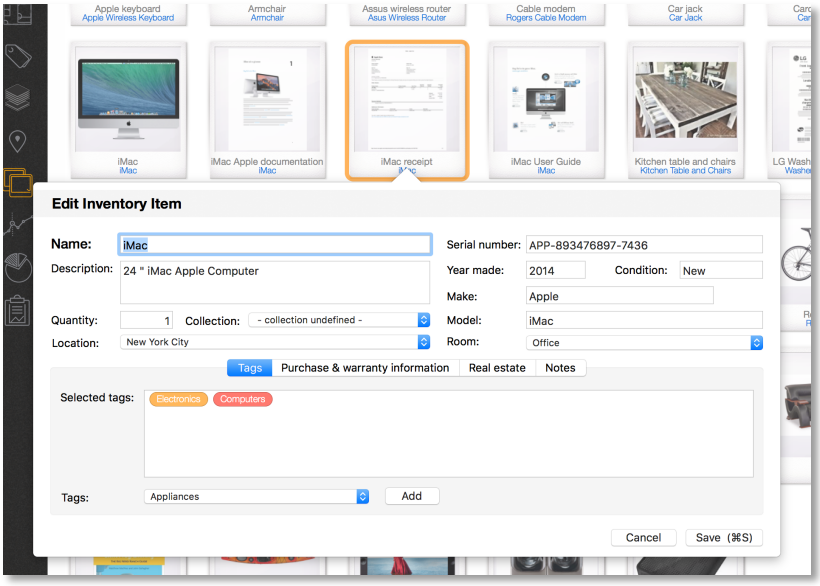
Open – opens the selected document's file in the default application registered to open such files.

Reveal in Finder – open a Finder window with the file selected in it.

View Document information – opens the selected document record:



View Inventory Item information – opens the inventory item's record related to the selected document:



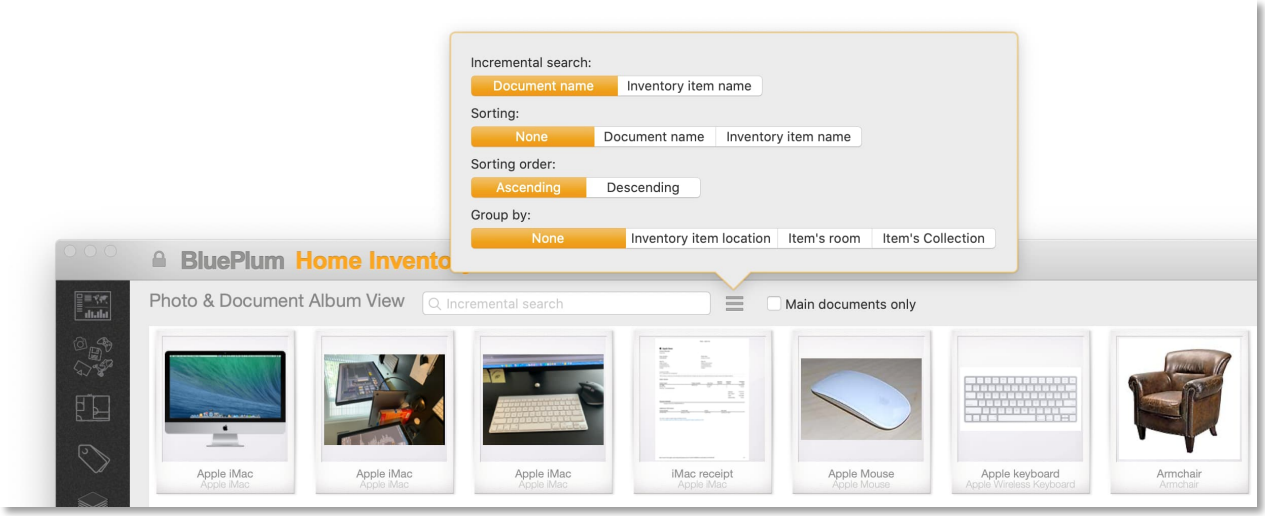
Delete – deletes the selected document and its associated file.

3.10.1 Filtering and grouping of documents in the photo album

To find a specific document, start typing part of its name in the 'incremental search' field. By default, the filtering is performed against the document name. To filter by inventory item's name, select the album's menu: ☰

If you want to display only one document per inventory item, select the option 'Main documents only'. That option will display only documents marked as 'Main' (only one document for each inventory item can be marked as 'Main').

By default, all documents will be displayed without grouping. To group them by location or a room, select the album menu: ☰



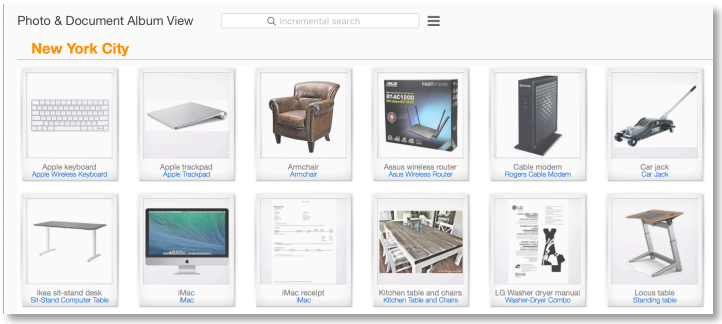
Incremental search – switch between document and inventory names when doing the incremental search.

Sorting – choose the way documents are sorted in the photo album.

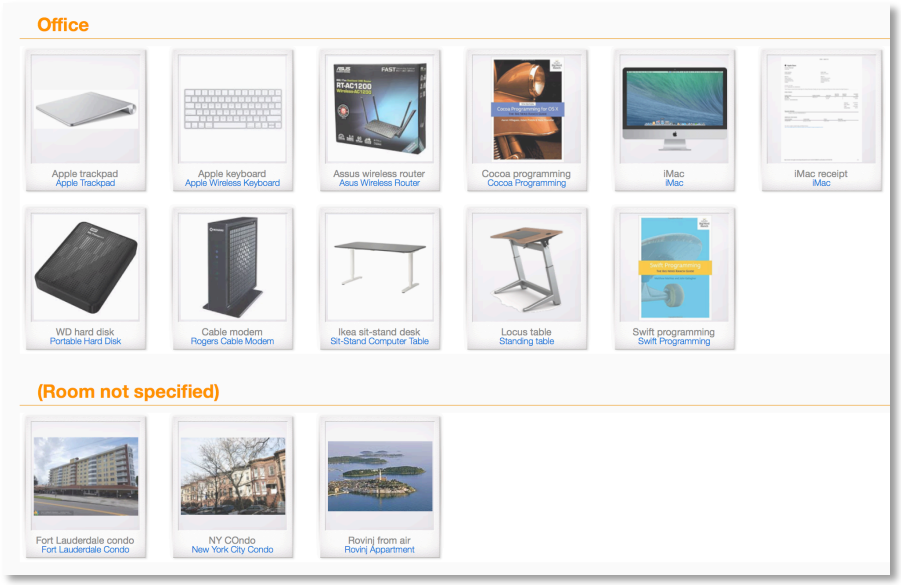
Sorting order – switch between ascending and descending order.

Group by – choose to group by location room or nothing at all.

When documents are grouped by a location, location's name will be displayed first and all documents/images from that location will follow:



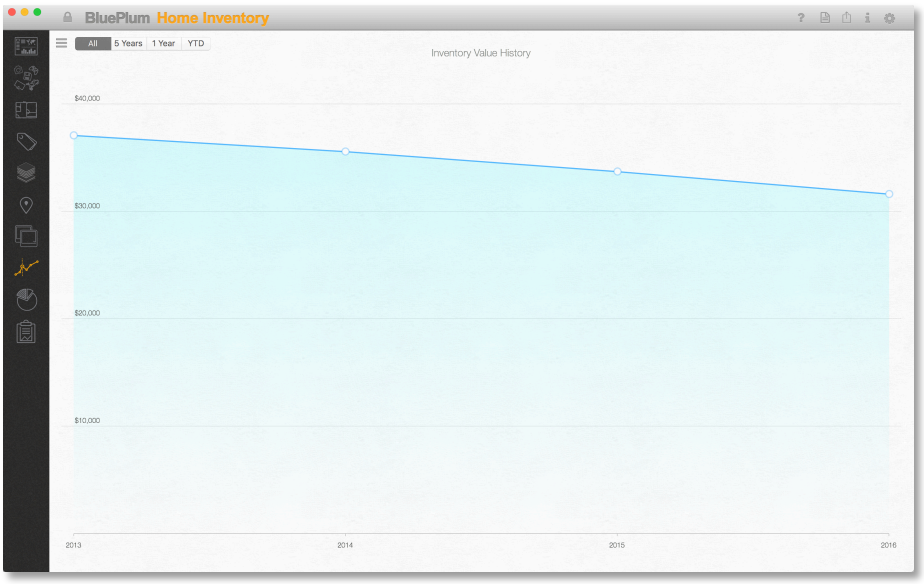
When documents are grouped by a room, a room name will be displayed first and all documents/images from that room will follow:



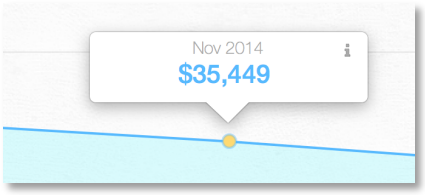
When documents are grouped, sorting is performed within each group.

3.11 Inventory value history chart

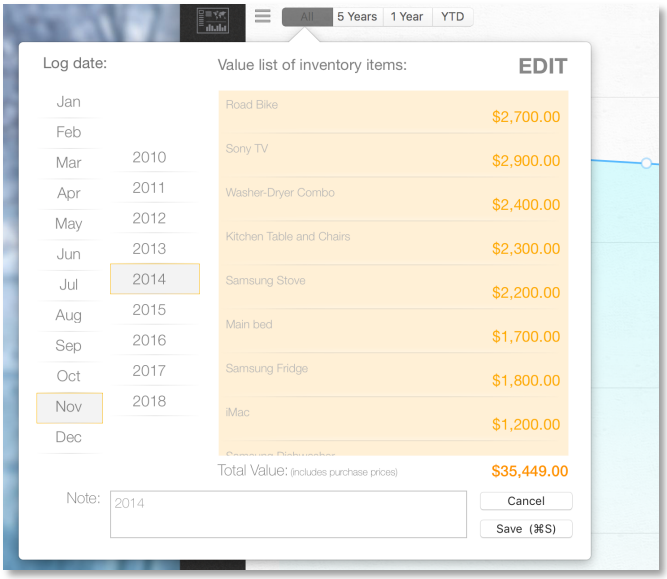
To display a full-sized value history's chart, select the 'Chart' sidebar button:



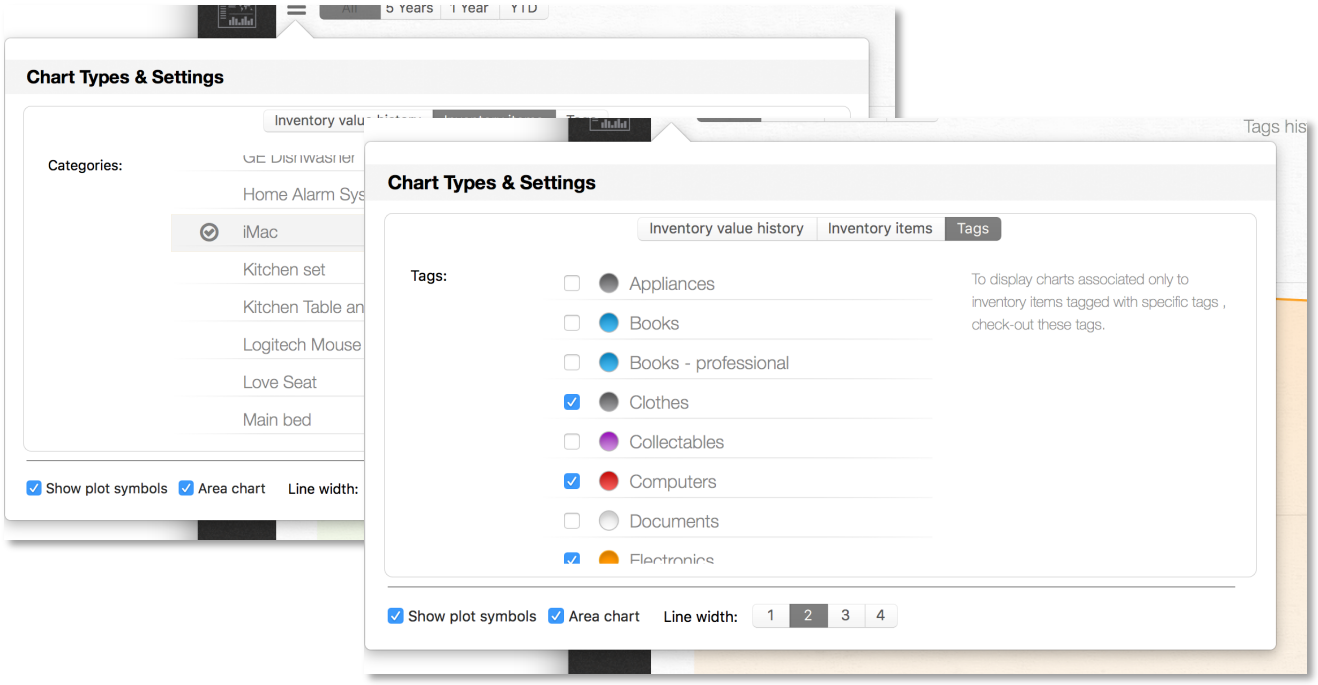
The chart displays changes in value of your complete home inventory. To see more details about a single value log, select the data point (a circle on the line chart):



To see the whole log for that period, select the small 'I' button in the top right corner of the popup.



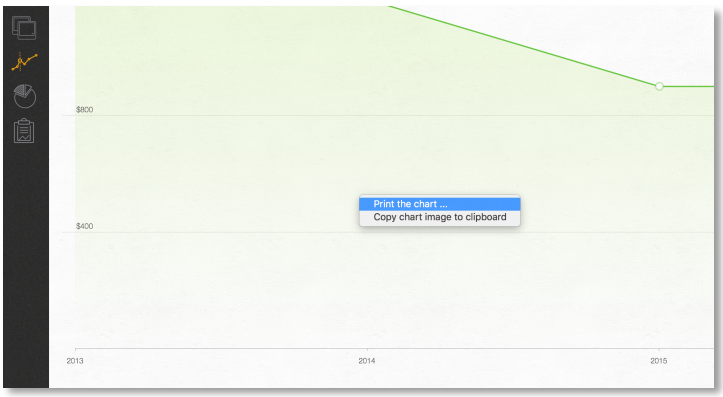
To change what gets displayed on the chart, select the chart's menu:



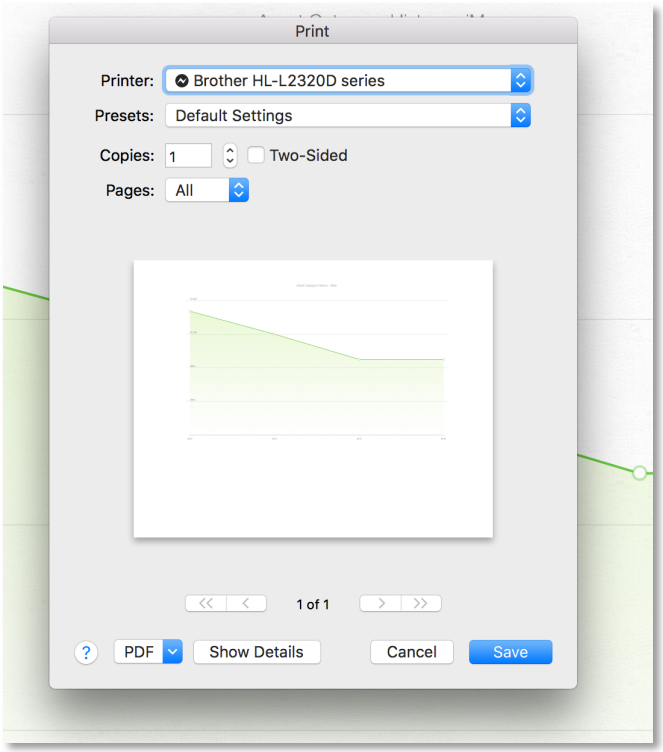
You can choose to display the whole inventory value history, value history of individual inventory items or a value history of items tagged by at least one of specified tags.

3.11.1 Chart printing and clipboard

If you click on the chart with a right mouse button, you will see a small context menu that will let you print the chart or copy it as an image to the Mac's clipboard. After you copy it to the clipboard, you will be able to paste it to any other application that would accept images from a clipboard.

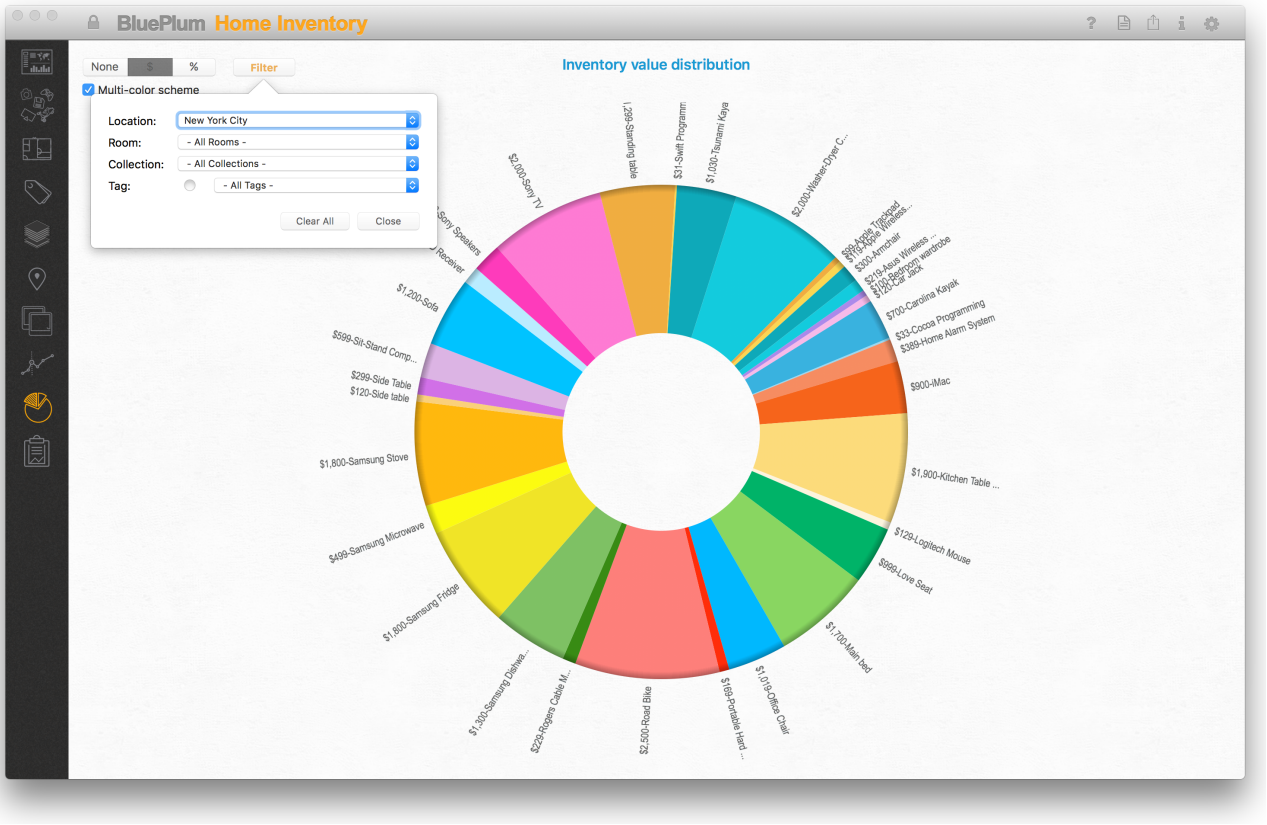


After you select to print the chart:


Print
Printer: Brother HL-L2320D series
Presets: Default Settings
Copies: 1
Two-Sided
Pages: All
1 of 1
PDF
Show Details
Cancel
Save

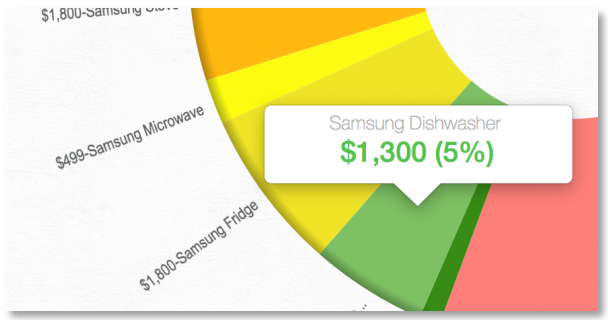
3.12 Inventory value distribution chart

To display a full-sized value history's chart, select the 'Pie chart' sidebar button:



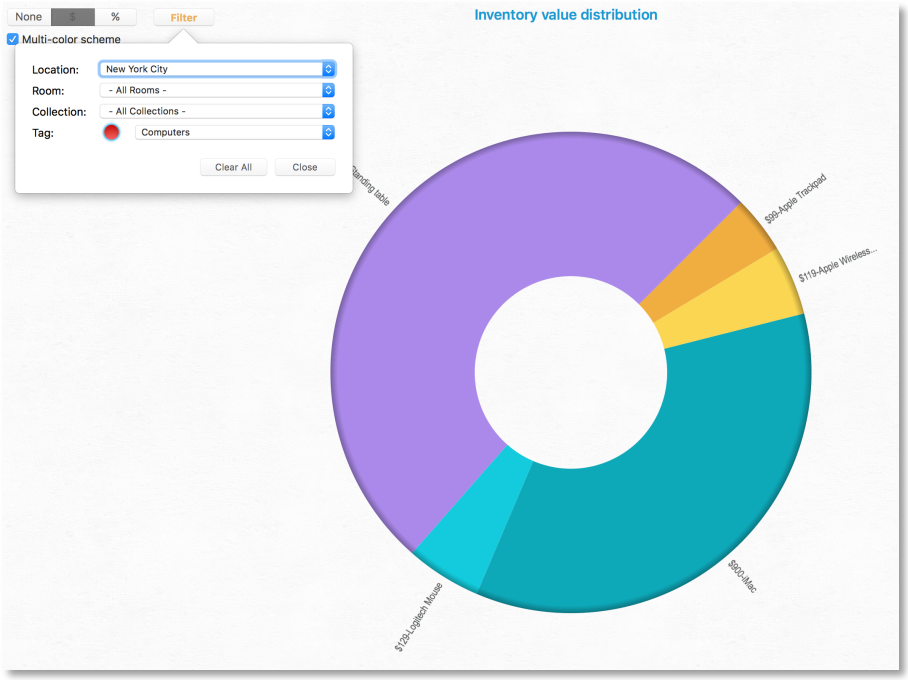
The value distribution chart is a pie chart showing what part of your total inventory (by default) each inventory item represents.

You can select each segment of the pie chart to see more details – current estimated value of the selected item and percent of the total inventory value:

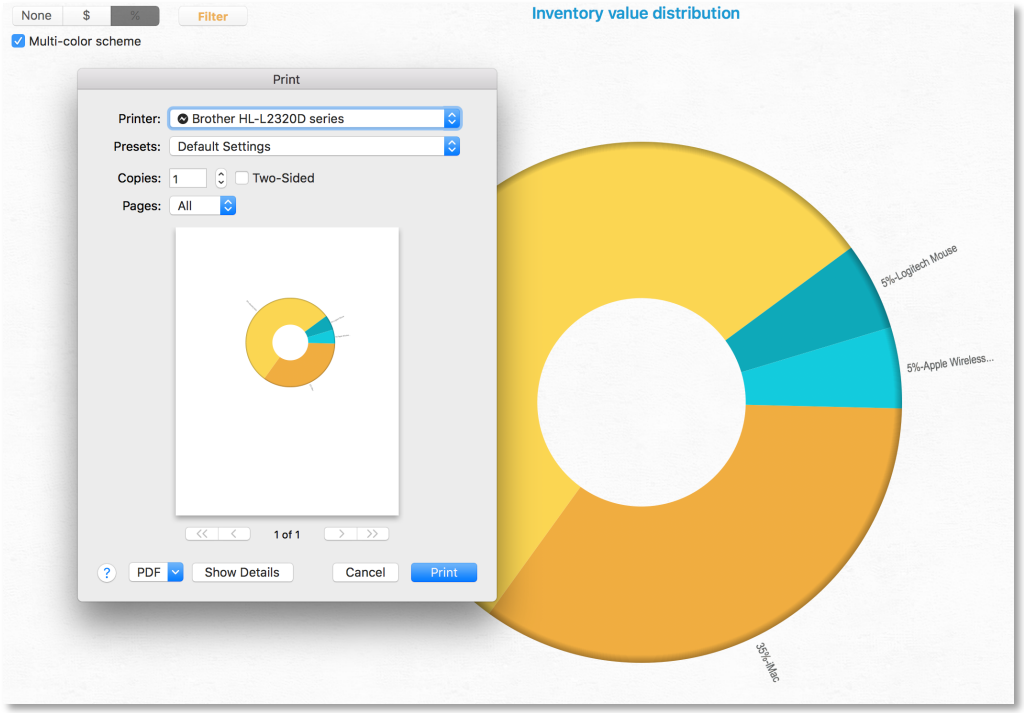


To filter the represented items, select on the filter button and set the filtering criteria.

For example, the following chart displays value distribution of New York items tagged with the 'Computers' tag:

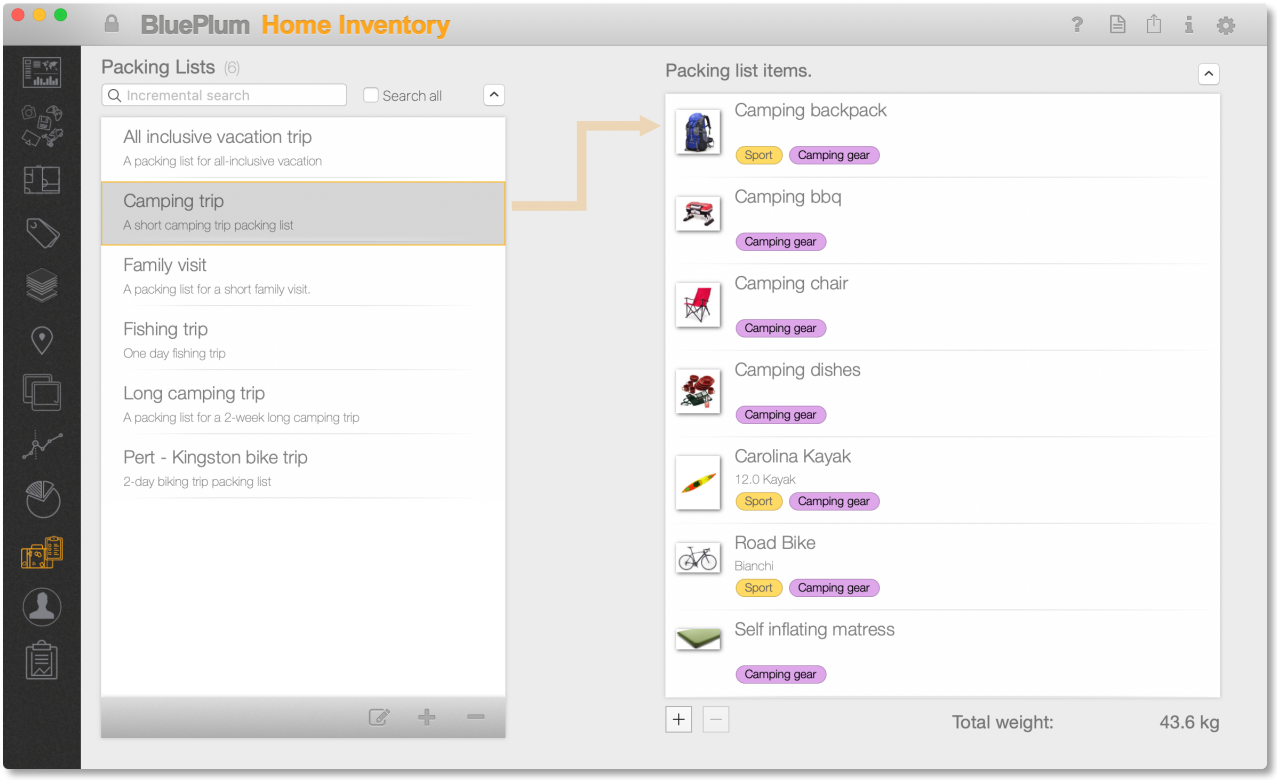


You can print the chart or copy it to a clipboard the same way as the line chart described in the previous section:

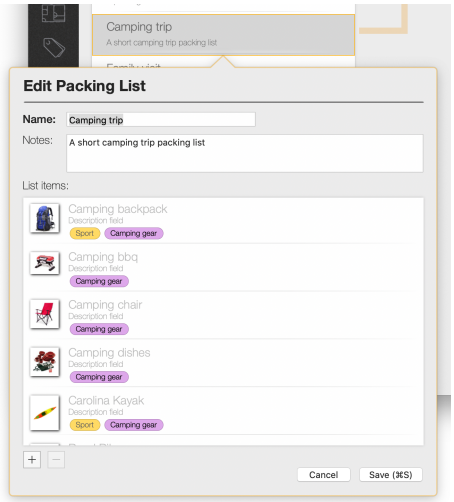


3.13 Packing lists

Selling a house, moving, going for a camping trip, all-inclusive vacation, ... For each of different trip types you need a different packing list. If you are selling a house or moving, you need a different packing list as well. The application lets you create multiple packing lists that include the weight of your items. packing list reports let you check-mark each of listed items.



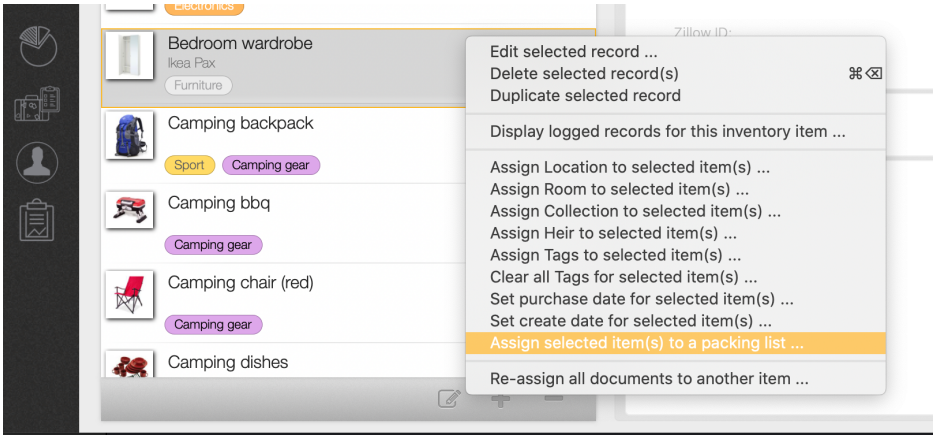
To create a new packing list, go to the packing lists view and click on the '+' button at the bottom of the packing list table. Once you add list name and select few of inventory items, you can save your new list.



After you have created a new list, if you select it, you will see all items belonging to that list.

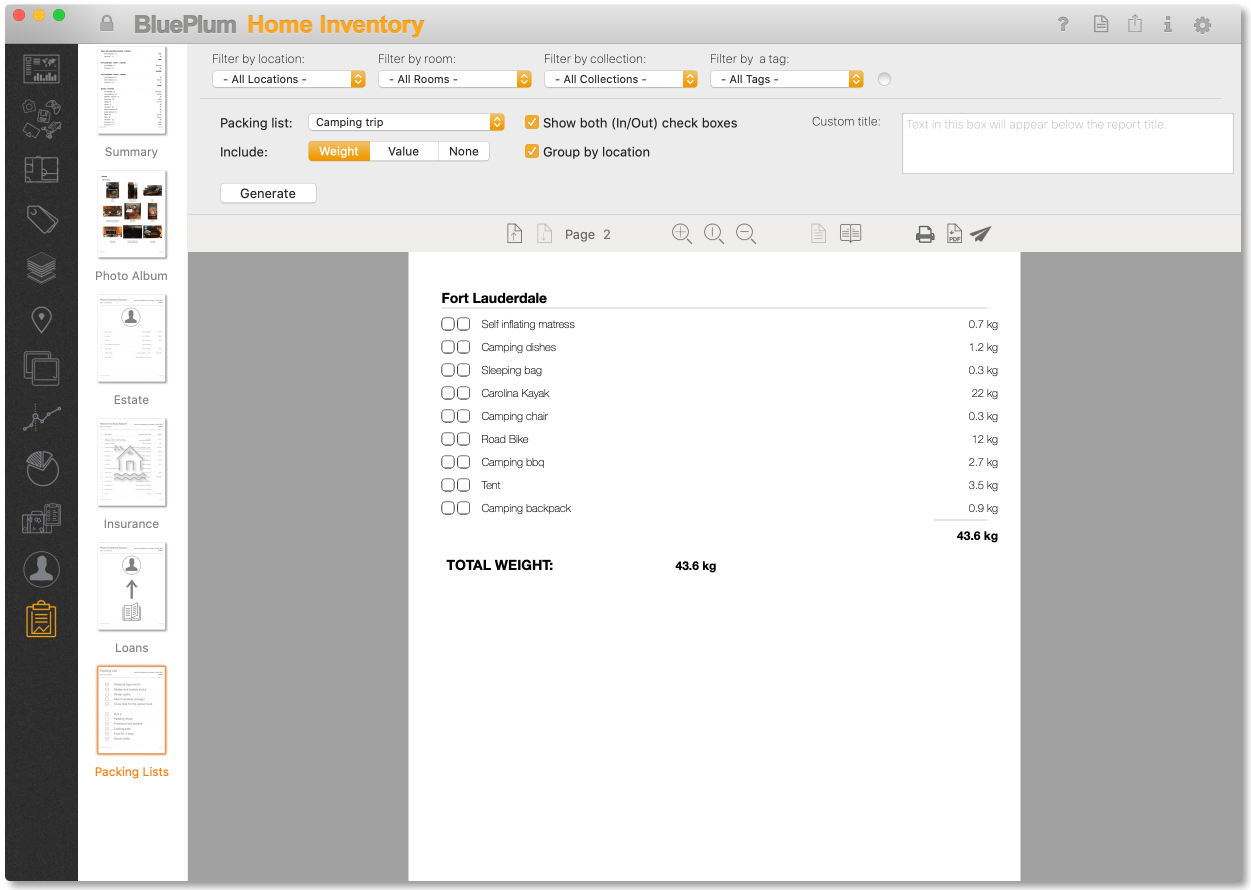
From the table displaying list items, you can add more items to the list or delete items from the list.

You can add items to a packing list from the main item list table as well. Select one or more items and right mouse click on the list to display its context menu:



Select the 'Assign selected item(s) to a packing list' menu command, select the packing list when a form shows up, and hist the 'Save' button to save your selection.

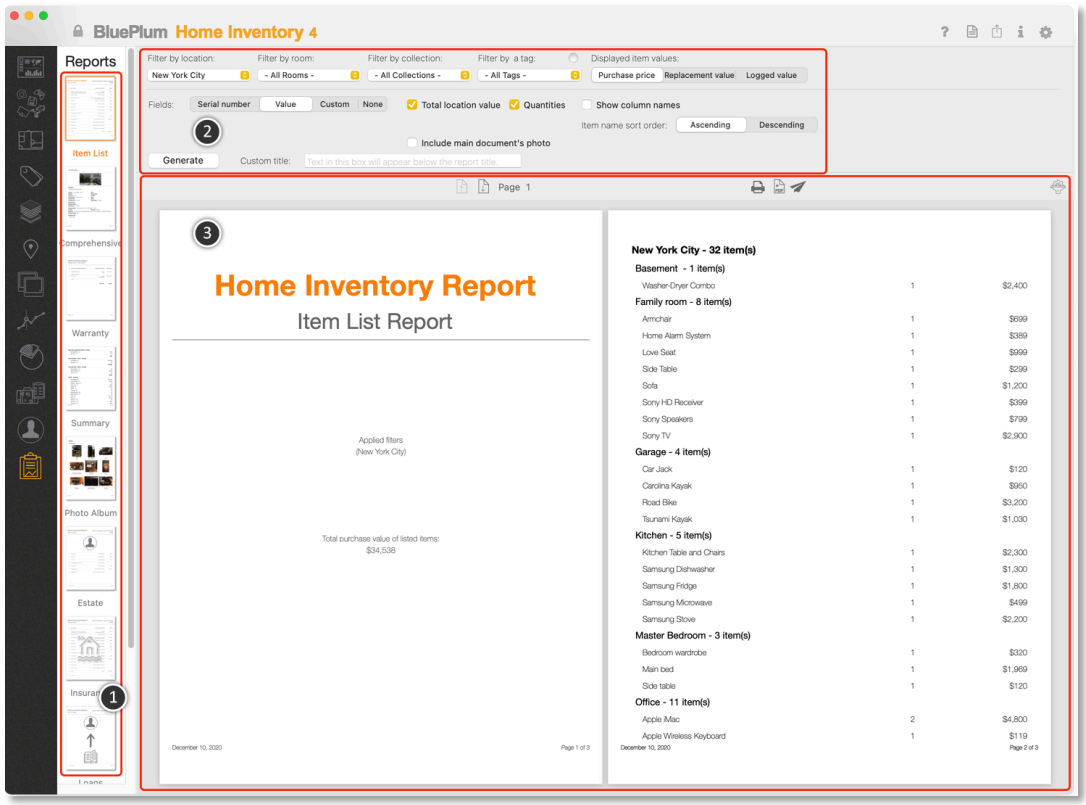
To create a packing list report, go to reports section, select 'Packing List' report type, select a packing list and click on the 'Generate' button to display the new report:



3.14 Reports

To get to the Reports view, select the 'Reports' sidebar button:

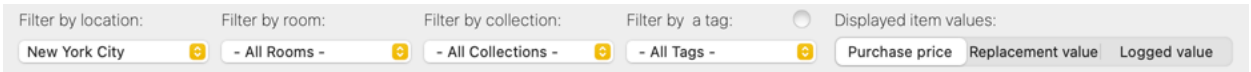
The Reports view is made up of 3 main areas: report selection (1), filtering and parameters (2) and the report preview (3):



Each report type will display the same filtering options, but it can display different parameters.

You can generate reports for all your inventory items or, for example, set a filter to include only items from a single location. Once you set your filters and parameters, click on the 'Generate' button to create the report.

Top options in the filtering and parameters area is common to all report types:



Filter by location - if you select a single property location from a choice list, only inventory items assigned to that property will be included in the report.

Filter by room - Only inventory items assigned to the selected room will appear in the report.

Filter by collection - Report will include only items belonging to the selected collection.

Filter by a tag - Report will include only items containing the selected tag.

Displayed item value:

If the report includes inventory item values, this option specifies which of several item related value types will be used:

> **Purchase price** - all values will include the purchase price only ($0 when no purchase price was specified).
>
> **Replacement value** - only replacement values will be included ($0 if no replacement value was specified)
>
> **Logged value** - only values from the most recent log value record will be included. If an inventory item wasn't included in the value log record, a purchase price will be used instead.

Each report will be generated as a PDF file that you can save to a disk, print or send to someone by email.

The following is a list of commands you can use for generated reports:

- Page down

- Page up.

- Zoom out

- Zoom to actual size

- Zoom in

- Single page view

- Double page view

- Print the report

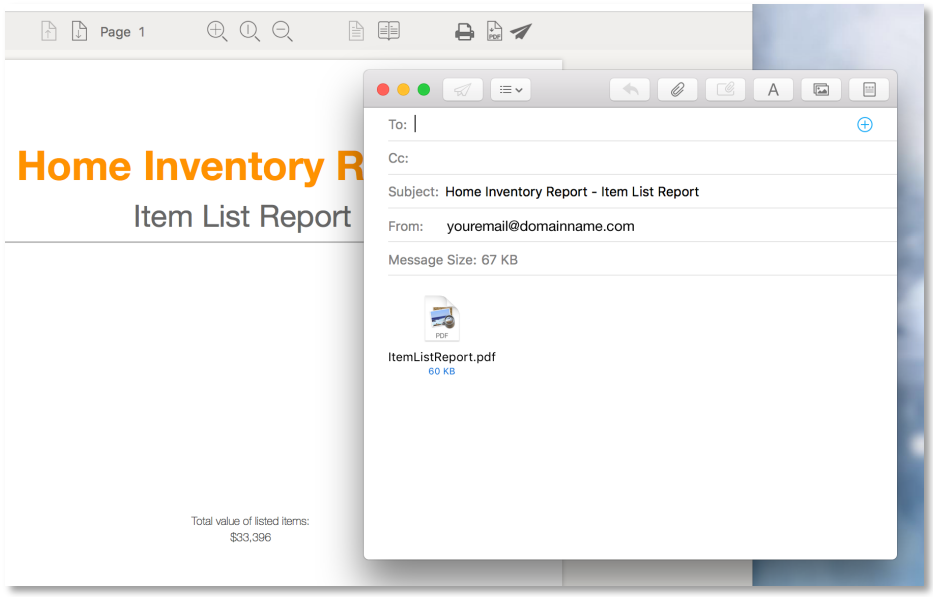
- Save the report to a disk

- Send the report by email

- Collapse/expand report filter area

3.14.1 Sending generated reports by email

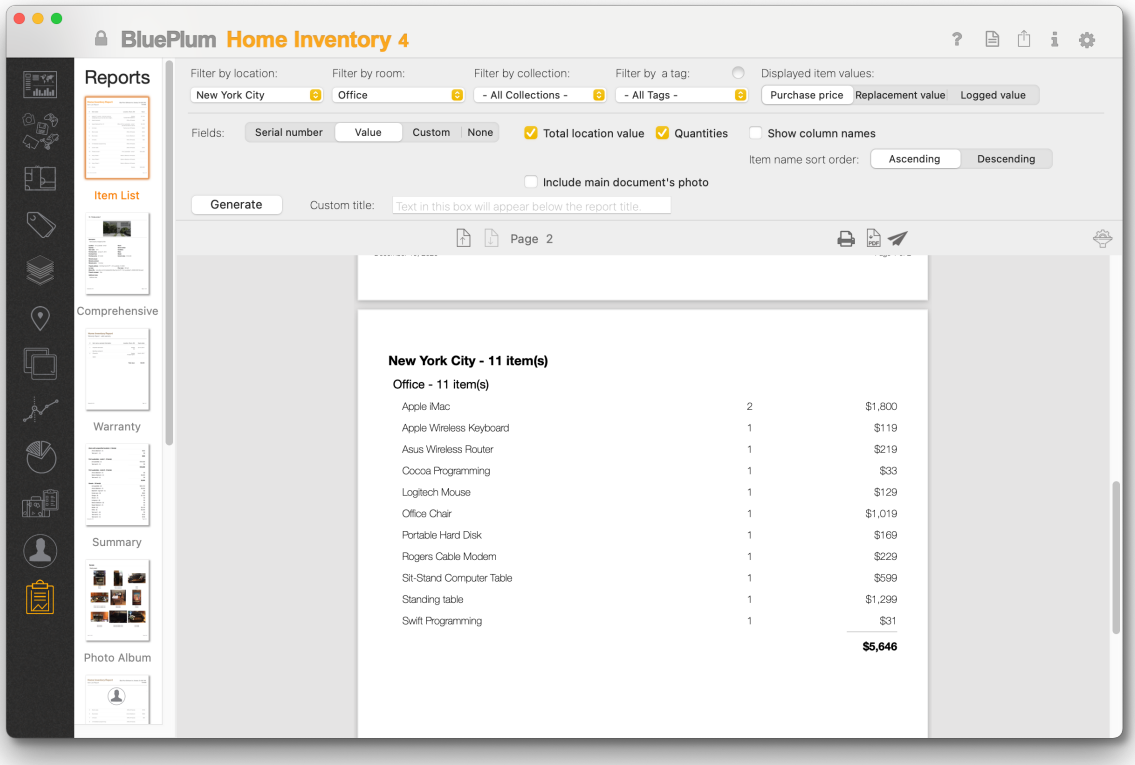
When you click on the 'Send by email' button, Apple's default Mail application will open, and a new email message will be created. The message will already contain the attached report and your email address will be set in the 'From' field:



Note: Some other email applications may not accept the attachment. In that case, you will need to save the report to your disk first, and then attach it to the email manually.

3.14.2 Item List report

The item list report lists all items in all rooms in all locations. A total value for each location will be calculated and displayed. For items that contain a serial number, that number will be displayed as well.



Parameter fields:

Serial number – select this option to include serial numbers in the report (selected by default)

Value – select this option to include total value of inventory items for each location (selected by default). If you haven't created value log records, the displayed value will be a purchase amount, and if you did, the displayed value will be a value from the most recently created value log record.

Custom - Show custom field values

None - Don't display any special values

Total location value - Calculate and display a sum of values for each location

Quantities - Show item quantities as well

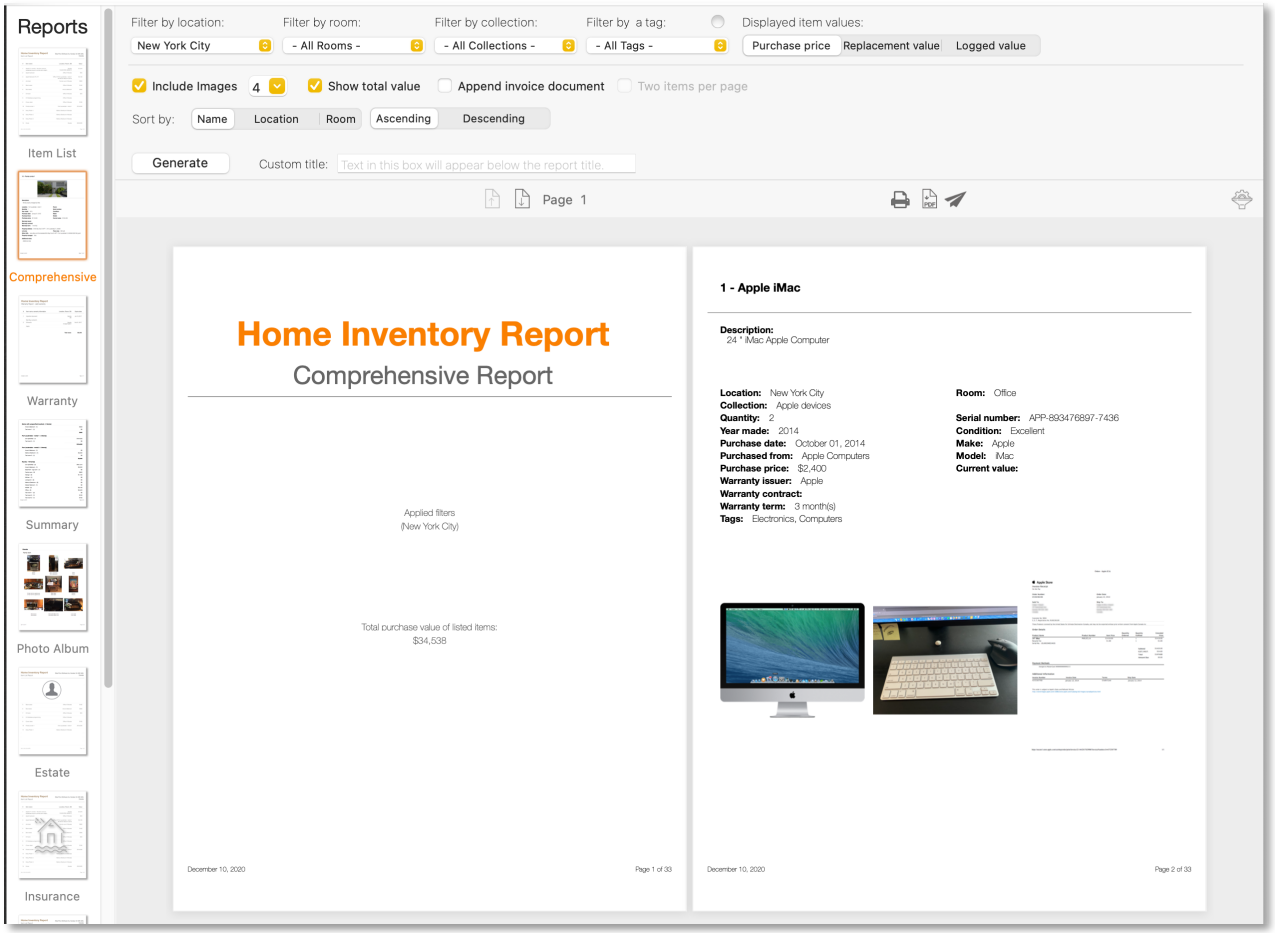
Show column names - Select to display column names at the top of each report page.

Include main document's photo - If checked, the report will include a photo (or a thumbnail image if a document is not an image) assigned to the main document record of the inventory item. If that option is checked, you will also be able to select a size class for the displayed photo: small (shows about 8-10 photos per page), medium (5-6 photos per page) or large (3-4 photos per page).

Custom title – If you want to add a text beside the report title, this is the place to do it (see a sample below)

3.14.3 Comprehensive report

A comprehensive report will create one page per inventory item. It will contain all information related to that item and it will include image of the main document associated to the item.



Parameter fields:

Include images – select this option to include item's image (selected by default). Select up to 6 images for each inventory item.

Include total value – select this option to include total value of all inventory items in the report (selected by default)

Append invoice document - for inventory items that have a document marked with 'Purchase invoice' option, the report will append that purchase invoice on a separate page right after the item's page.

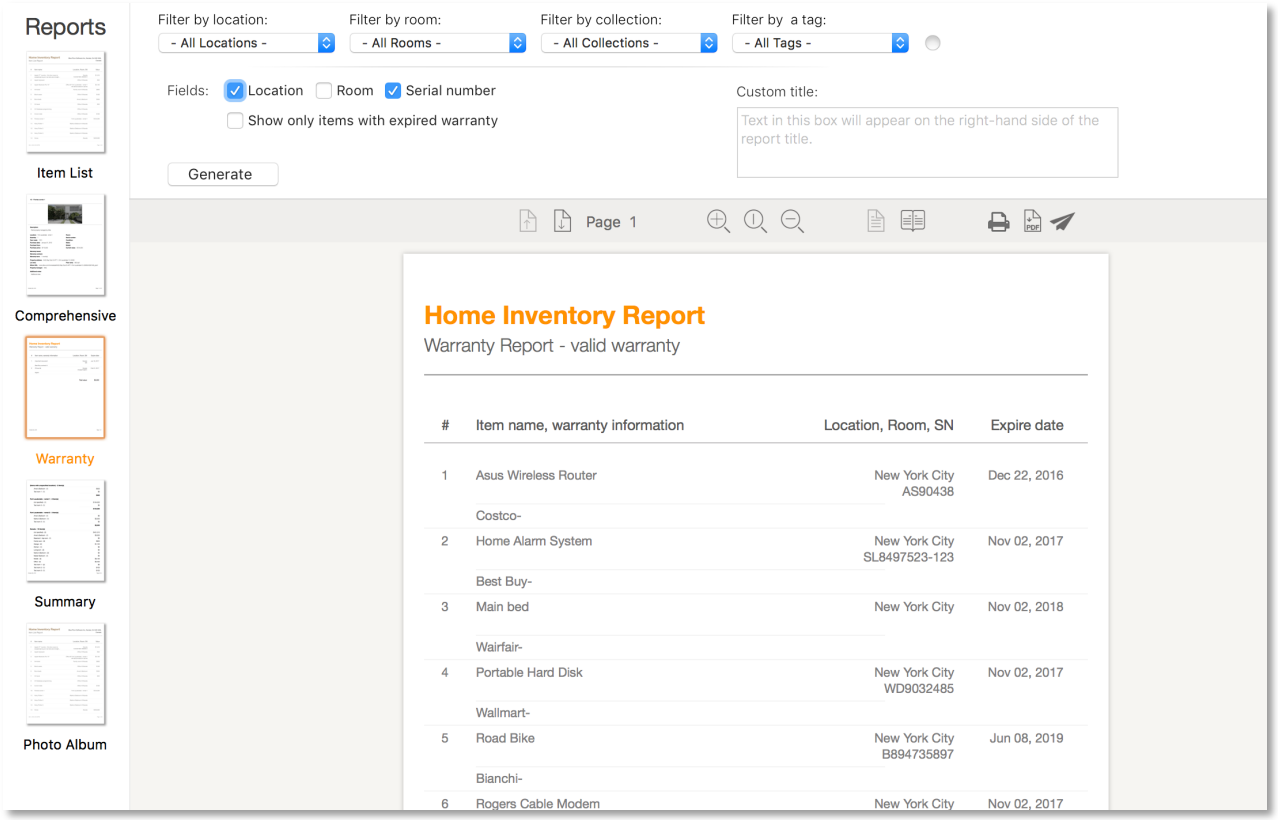
Two items per page - Select this option if you prefer to see 2 inventory item descriptions on a single page. This option is possible only if you include only one inventory item image.

Custom title – If you want to add a text beside the report title, this is the place to do it (see a sample below)

Sort by – sort items by the selected criteria

3.14.4 Warranty report

Warranty report will create a list of items that have warranty information by default, it will list only items that still have a valid warranty.



Parameter fields:

Location – select this option to include item's location (selected by default)

Room – select this option to include a room where the item is located (not selected by default)

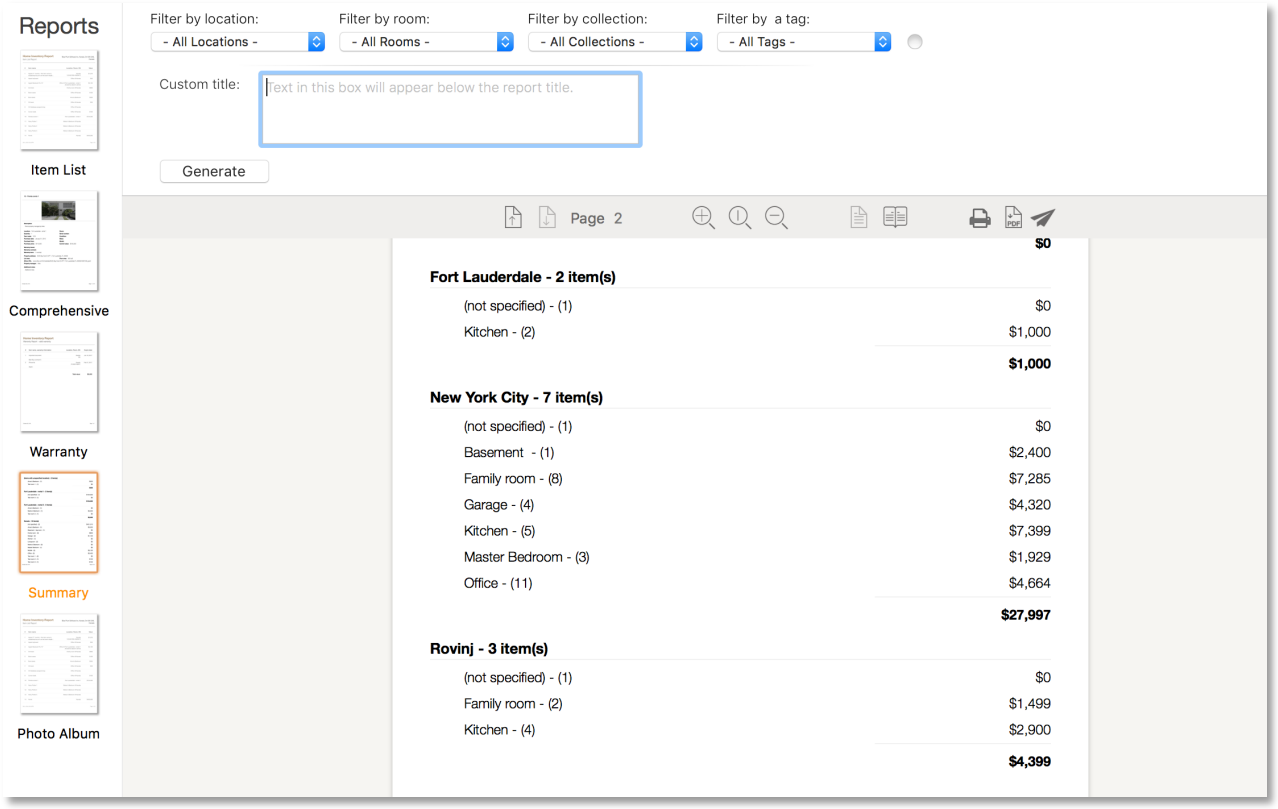
Serial number – include item's serial number (selected by default)

Show only items with expired warranty – the title says it all (not selected by default)

Custom title – If you want to add a text beside the report title, this is the place to do it (see a sample below)

3.14.5 Summary report

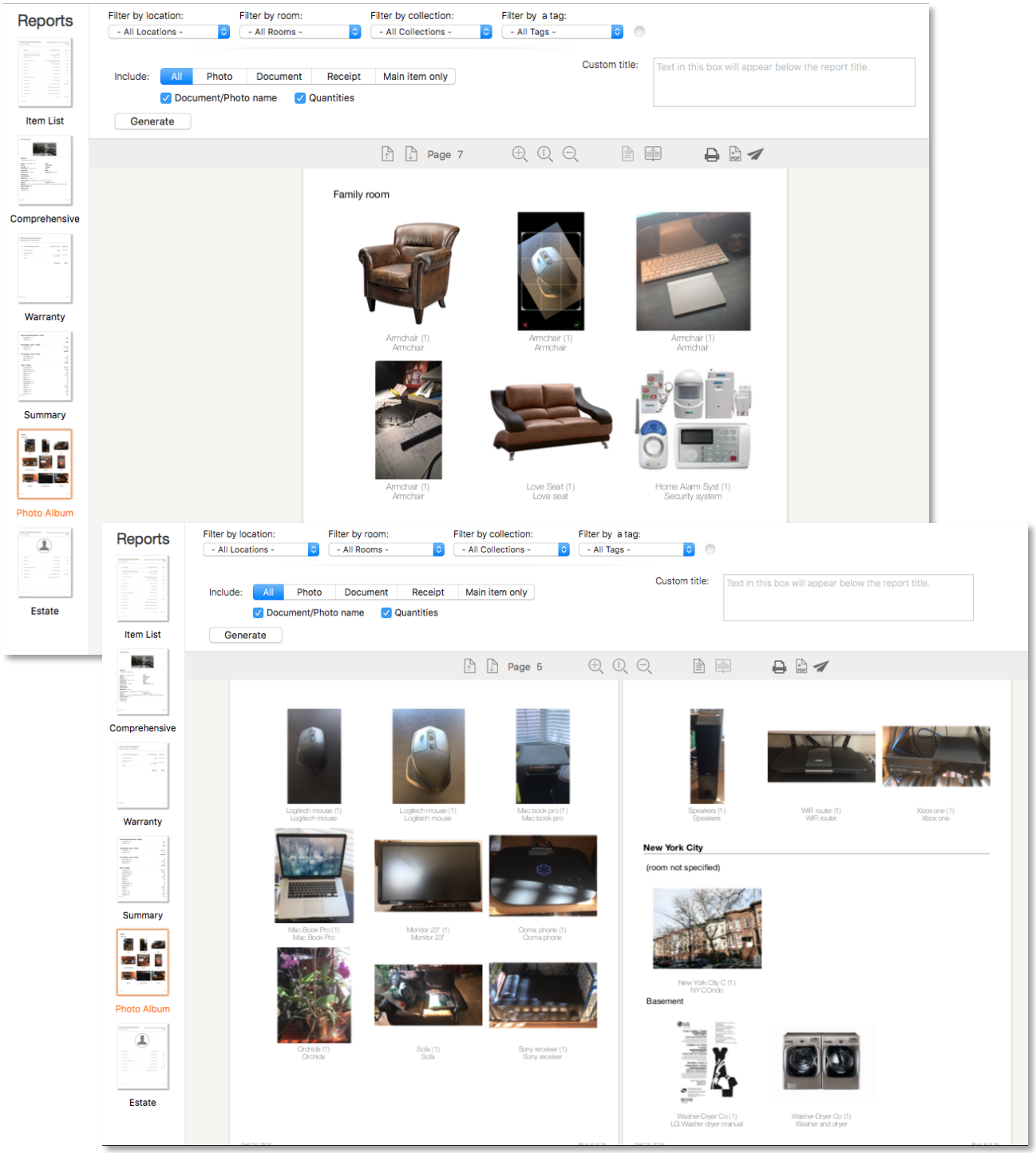
The summary report will list all locations and all rooms. It will include the number of items on each location and in each room, as well as total value of these items.



3.14.6 Photo Album report

This report will include only images of all documents added to your home inventory. For each document, it will add its name and the name of the item it is associated to.

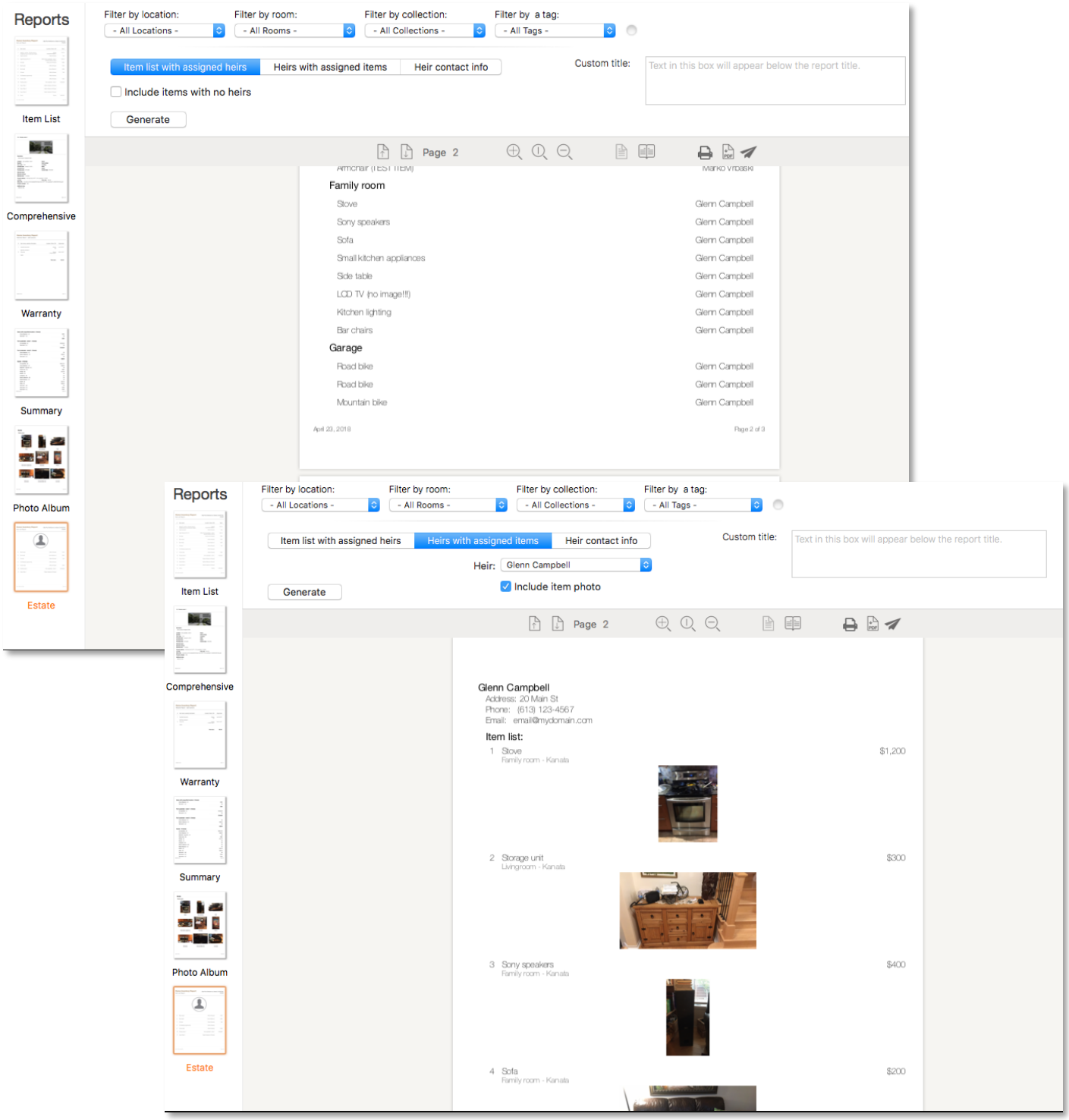
Besides the usual filtering options, you will be able to filter images by their type as well:



3.14.7 Estate report

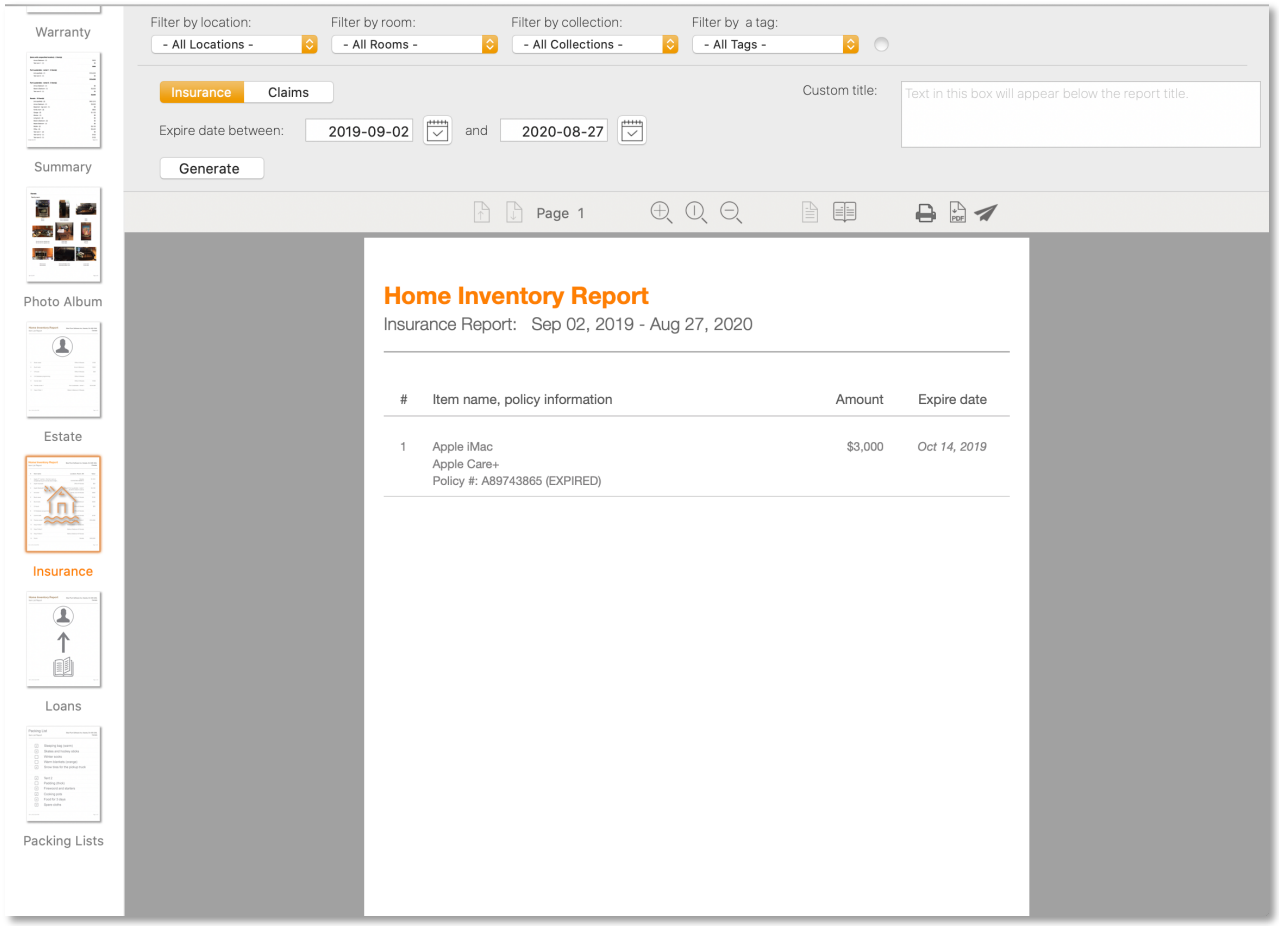
Here, you can create the following estate reports:

- List of all items with assigned heirs
- List of all assigned items for each heir with heir contact information
- List of all heirs with their contact information



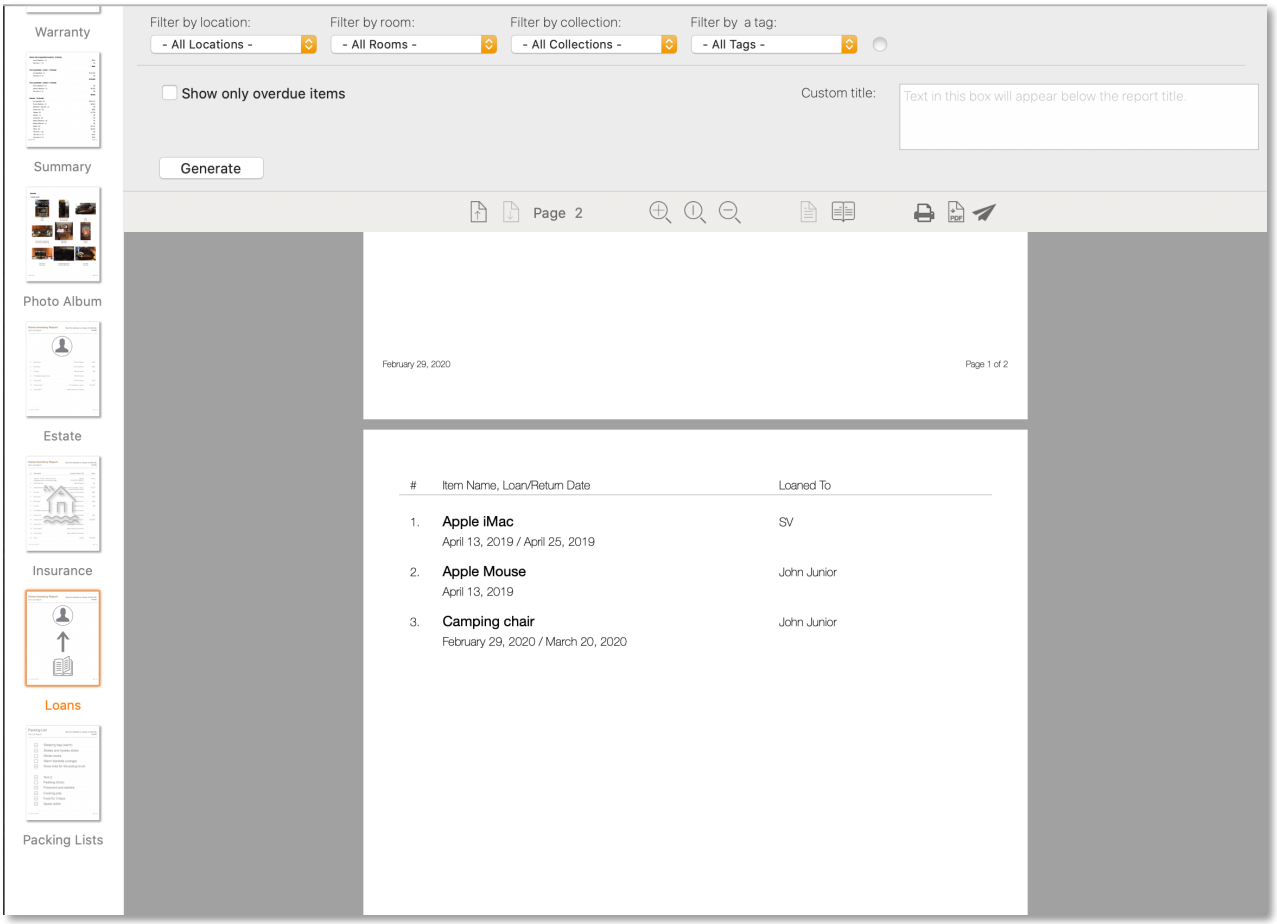
3.14.8 Insurance report

Insurance report lets you list all your insurance policies or claims with dates between a specific range.



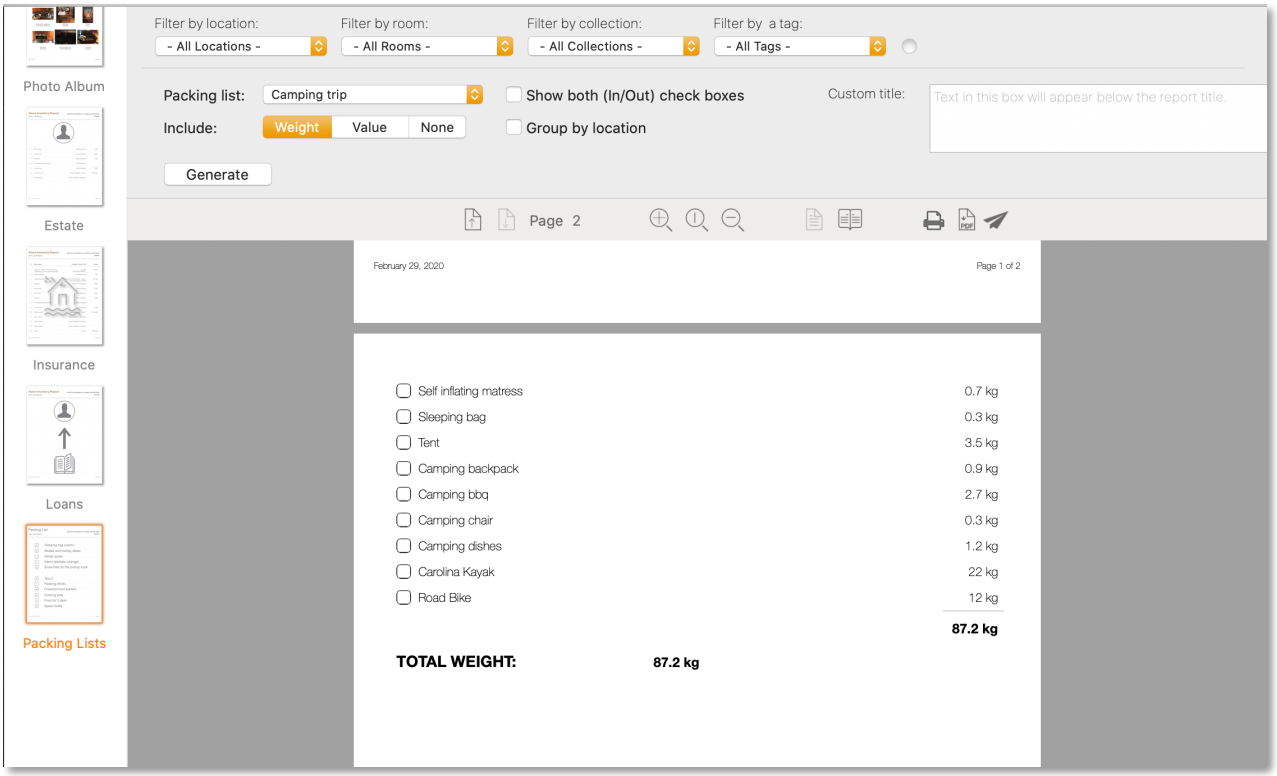
3.14.9 Loans report

Loans report lets you list all your currently loaned items. You have an option to list only overdue items as well.



3.14.10 Packing list report

Packing list report will list all items belonging to a selected packing list. You can choose to display one or two check boxes as well. The two checkbox lists lets you checkmark items when you are packing them for the trip, as well as when you are packing them when you are returning from the trip.



3.15 Importing inventory records from a CSV file

A Comma Separated Values (CSV) file is a plain text file that contains a list of data. These files are often used for exchanging data between different applications. For example, databases and contact managers often support CSV files. A CSV file has a simple structure. It's a list of data separated by commas.

To import data into this app, your CSV file needs to have a header row (a first row in the file) and data rows. The header row describes your data columns so the inventory application can assign them to correct fields and import them.

The following is an example of a valid CSV file:

```
Name,Description,Serial number,Quantity,Year
built,Make,Model,Condition,Purchased from,Purchase date,Price

"Apple iMac","iMac Apple Computer",APP-893476897-
7436,1,2014,"Apple","iMac","New","Apple Computers","2014-10-
01","$1,475"

"Apple Wireless Keyboard","Apple Magic
Keyboard",AK8372598,1,2012,"Apple","Apple Magic Keyboard","Fair","Apple
Computers","2018-05-14","$119"
```

If your existing inventory tracking application can export records in such a form, Home Inventory can import these data.

Also, if you have been tracking your items with an Excel spreadsheet, you can export the spreadsheet records into a CSV file and import it to the application as well.

3.15.1 Import form

To open the CSV import form, click on the 'Inventory data' toolbar button and select 'Import item list from a CSV file ...' command from the menu:

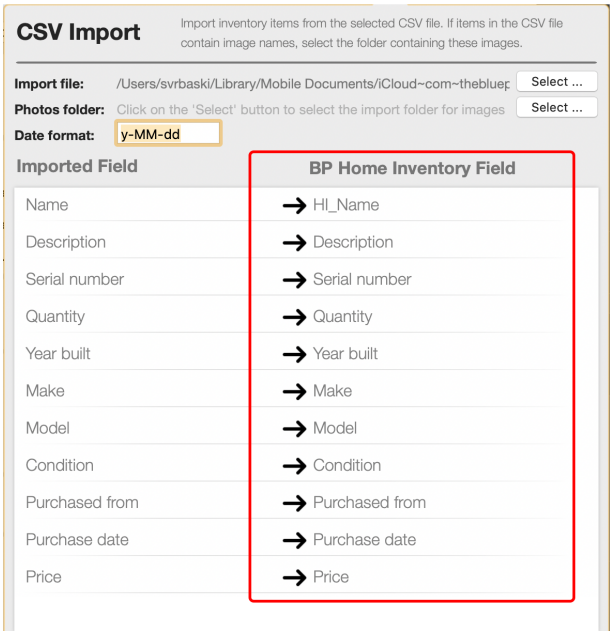
Import file - click on the 'Select' button to choose the import CSV file. That is the file with a header row and item list rows.

Photos folder - click on its 'Select' button to select the location of images and documents referenced within the CSV file (only if mapped to the 'Image name' field) in case there are some.

Date format - if your CSV file contains a purchase date column, that column needs to be in the exact format as described by the 'Date format' field. The default date format is the one your MacOS regional settings specify.

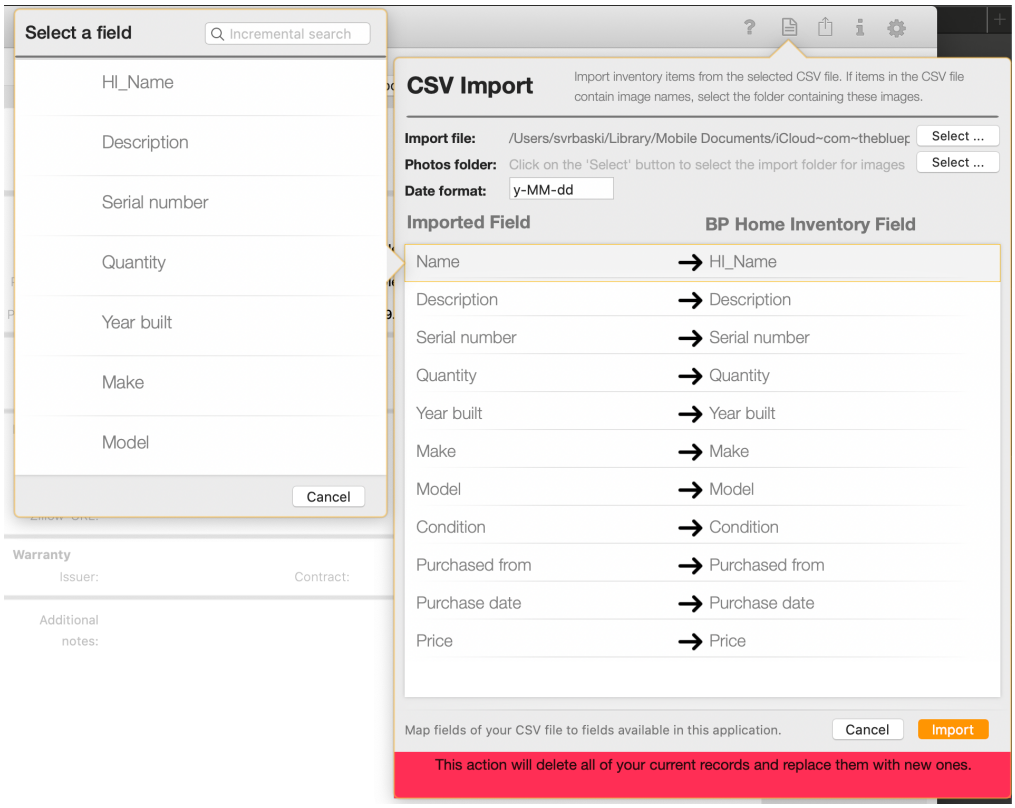
Overwrite all existing data - Select this option (default) if you want to replace all your existing data with the ones from the CSV file. If you want to append new data from the CSV file to your existing data, make sure this option is not checked.

Once you have selected a CSV file, the application will read the file and extract columns from its header row (first row of the CSV file).



The application will try to map column names from the CSV file to the ones available within the application (highlighted in red in the image on the left). You will have to go through each column and verify that the mapping is correct or, in case the application was not able to find a mapping, map manually a column from the CSV file to a field of the application.

To change or set the mapping, click on a right-side column's row to see a list of all available application fields (see the image below).



To select an application field, click on it.

The following is a list of fields that require some attention or more explanation:

Location - a location specified in the CSV file's row will cause the Home Inventory application to create a separate location record and assign it to the imported inventory item.

Room - a room specified in the CSV file's row will cause the Home Inventory application to create a separate room record and assign it to the imported inventory item.

Collection - a collection specified in the CSV file's row will cause the Home Inventory application to create a separate collection record and assign it to the imported inventory item.

Heir - a heir specified in the CSV file's row will cause the Home Inventory application to create a separate contact/heir record and assign it to the imported inventory item.

Purchase Date - as described earlier, format of the purchase date field must be in the form specified by the 'Date format' field.

Price - the price must be specified in the currency defined by your MacOS's regional settings. If, for example your purchase prices were in US$, that CSV column needs to contain the "$" sign and conform to the regional settings' currency number format ("$1,450 for example").

Image name - if you map a column from the CSV file to the 'Image name' field of the application, the application will try to find that image in the folder specified by the '**Photos folder**' field of the import form.

Tag1..10 - you can assign up to 10 columns of your CSV file to be tags. Some CSV rows could have no tags, and some could contain more than one. The application will create a tag record for each unique tag it encounters in the CSV file.

3.16 Backing up and restoring your data

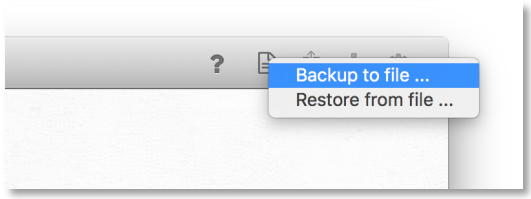
3.16.1 What is Data Backup?

Data backup involves the storing of your home inventory file from your computer to another location. In this way, if there is ever any loss of data on your primary machine, you still have your data in order to restore the file. In the world of computers, loss of data can be devastating, and while there are possibilities for recovery of data after a disaster it is far easier to restore your file from a backup than to attempt to find your data on a crashed hard drive.

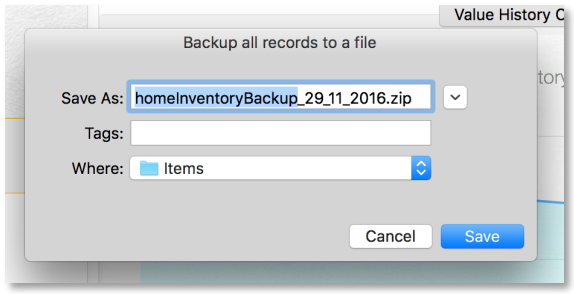
Data backup is easy to do and can save you great amounts of time as well as ensure that your data is secure in the case of disaster.

3.16.2 Backing up your data

Click on the '**Backup and Restore**' toolbar button ( ) and select '**Backup to file …**' menu command:



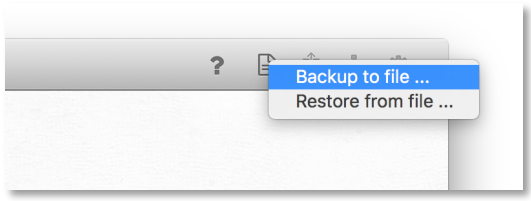
After you click on the menu you will have to choose your backup location folder and the file name. The application will suggest a file name that consists of the 'homeInventoryBackup' string and the current date. If you want, you can change it to something else. To finish creating the backup file, click on the '**Save**' button:



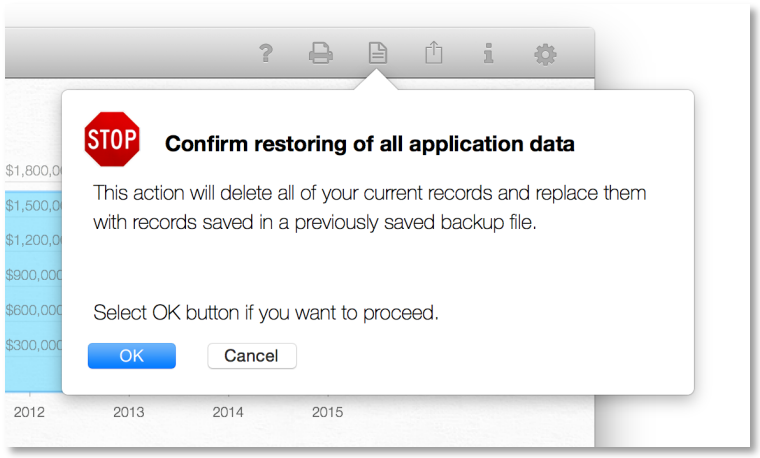
Note: It is advisable to keep your backup files in a cloud storage. You can use any of a number of currently available cloud storage providers: iCloud Drive from Apple (http://icloud.com), OneDrive from Microsoft (http://onedrive.com), Dropbox (http://dropbox.com), etc.

3.16.3 Restoring your data from a backup file

Click on the '**Backup and Restore**' toolbar button ( ) and select '**Restore from file …**' menu command:



Before you can proceed you need to read and acknowledge a warning message. Once you restore your data from a backup file, all your current data will be overwritten by the data from the backup file:



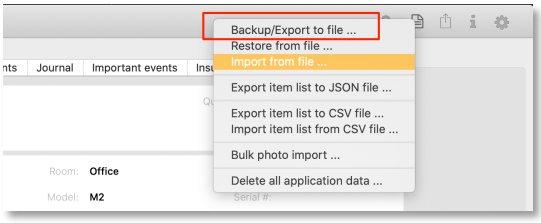
Once you click on the '**OK**' button you will be able to choose a backup file to restore from.

Select a file from your backup location and hit the '**Open**' button. You will see a notification message when the application finishes restoring your data.

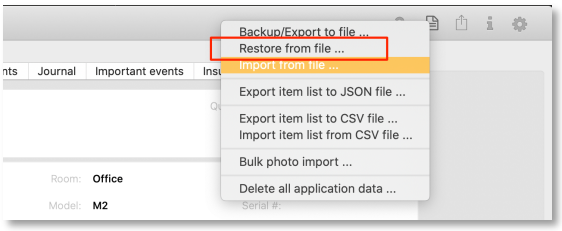
3.17 Importing data from other users

If you want to let your family members help you with adding data to your home inventory, you can let them work on their own computers and import their data later.

Before you do that, you can create all the necessary categories like rooms, collections, tags, locations and export the home inventory file to a shared location that can be accessed by everyone else (iCloudDrive or any other cloud storage for example):

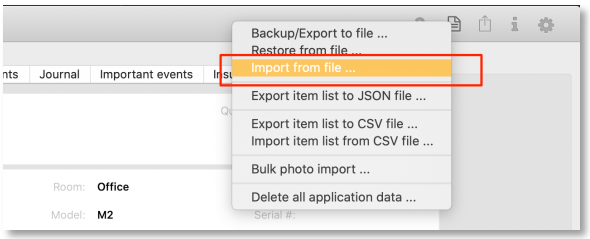


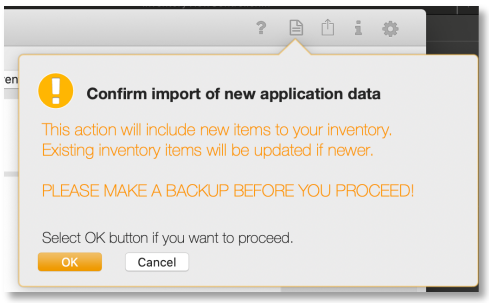
Someone else can import your data file:



and continue adding new inventory items on their computer. In the meantime, you can continue adding inventory items on your own computer as well.

Once they are finished, they can export their inventory to another file that you can import to your own, main, inventory repository:





⚠️ Currently, only new items will be imported.

If another user changed an item that you have previously created, those changes will not be imported to your main repository.