

PRO EDITION · GETTING STARTED

Your first *proper* report.

This guide walks you through every step of creating a professional photo documentation report with SnapToFile Pro — from setting up your company profile to exporting a finished PDF. No experience required.

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COMPANY PROFILE & REPORT INFO

*03-05*PHOTOS, ANNOTATIONS &
TRANSFORM

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BULK EDIT, SUMMARY & EXPORT

WHAT YOU NEED TO GET STARTED

SnapToFile Pro runs entirely in your web browser. There is **nothing to install** — no app to download, no account to log into. Everything you create stays on your device until you export a PDF.

Open the Pro generator at snaptofile.com/app/pro in Chrome, Safari, or Edge on any phone, tablet, or computer. That's it. You're ready.

QUICK-START CHECKLIST

- Your company name, address & phone number
- Your company logo (optional — PNG or JPG)
- The photos you'll be documenting
- Claim number, job address, or project name
- A few minutes — most reports take 10–20 min

Your work is saved automatically in your browser as you go. If you close the tab and come back, your photos and settings will still be there — on the same device and browser you started with.

1

SETUP

Set Up Your Company Profile

The first time you use SnapToFile, spend two minutes filling in your company details. **This information saves to your browser** — so the next time you start a report, it's already there. You won't need to type it again.

- A **Find the Company Profile section** — it appears at the top of the generator, above the report fields.
- B **Enter your company name, address, phone number, and email.** These appear on the cover page of your finished PDF.
- C **Upload your company logo** (PNG or JPG recommended). Your logo will appear on the PDF cover page. Pro only.
- D **Click Save Profile** — your details are stored. Future reports will load them automatically.

Pro tip: If you work for multiple companies or want a different header for a specific client, you can edit the profile fields at any time before exporting — the saved profile is just your starting point.

2

REPORT DETAILS

Enter Your Report Information

Below the company profile, you'll find the **Report Information fields**. These are specific to this job or claim — fill them in fresh for every report.

- A **Insured / Property Owner Name** — the name of the homeowner or business owner.
- B **Property Address** — the full address of the loss location or job site.
- C **Claim Number / Job Number** — the carrier's claim number, your job number, or both.
- D **Date of Inspection / Date of Loss** — fill in the relevant date for your report type.
- E **Inspector / Adjuster Name** — your name or the field rep's name.

Note: These fields appear in the header of your finished PDF report. Double-check the claim number and address before exporting — they are the primary identifiers carriers and clients use to file your report.

3

PHOTOS

Upload Your Photos

SnapToFile works with photos from any source — your phone's camera roll, a memory card, a laptop folder, or photos taken directly from your device's camera. You have three ways to add them:

- 1 **Drag and drop** — drag photos directly from a folder on your computer onto the upload area. You can drop many at once.
- 2 **Browse / gallery** — tap or click the upload button to open your photo library and select one or more files.
- 3 **Camera** — on a phone or tablet, use the Camera option to take a new photo and add it instantly.

Once uploaded, each photo appears as a card. You can **add a caption** to any photo — this caption prints directly below the image in your PDF. Write a brief description of what the photo shows, such as "North slope — missing shingles along ridge line."

Best practice: Upload photos in the order you want them to appear in the report. SnapToFile arranges them in upload order. You can re-order them afterward by dragging the photo cards into position.

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ANNOTATIONS PRO

Mark Up Your Photos

Click on any photo to open it in the editor. Select the **Annotate tab** to access the full set of markup tools. Annotations are baked into the image when it prints — the carrier or client sees exactly what you've marked, on every device.

AVAILABLE ANNOTATION TOOLS



- **Arrow** — draw an arrow pointing at specific damage. Ideal for directing attention to a single spot.
- **Circle / Rectangle** — surround an area of concern. Use circles for small spots; rectangles for larger sections or rows.
- **Highlight** — a semi-transparent band, useful for calling out a line of damage without obscuring it.
- **Freehand** — draw any shape with your finger or mouse. Good for irregular damage patterns.
- T **Text** — type a label directly onto the photo. Use alongside arrows for measurements or item callouts.
- 🔍 **Magnify** — creates an inset zoom box on the photo to show fine detail that might not be visible at full size.

Colors: You can change annotation color. Use red or orange for primary damage markers, blue for secondary notes. Keep it consistent across the report — carriers read dozens of reports and consistency signals professionalism.

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TRANSFORM TAB PRO

Crop, Rotate, and Zoom

With the photo editor open, switch to the **Transform tab** to adjust the framing of any photo before it goes into your report. No need to re-take or edit photos outside the app.

- ✂ **Crop** — drag the corners to remove distracting edges or tighten focus on the damage area.
- ⤴ **Rotate** — fix a sideways or upside-down photo taken in the field.
- + **Zoom** — enlarge the view to inspect detail before annotating.
- 👉 **Pan** — move around a zoomed photo. Use with Zoom when working on one section.

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EFFICIENCY

Bulk Edit Multiple Photos

When you have a large set of photos that share the same context — for example, all photos from the same elevation — the **Bulk Edit** feature lets you apply a change to many photos at once instead of opening each one individually.

- A **Select multiple photos** — check the boxes on the photo cards you want to edit together.
 - B **Choose your action** — apply a shared caption, delete the group, or apply other available bulk actions.
 - C **Confirm** — the change applies to all selected photos in one step.
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7

DAMAGE SUMMARY

Write Your Damage Summary

The **Damage Summary** section appears below your photos. This is the narrative portion of your report — a written description of what was found. SnapToFile Pro includes a **template builder** to help structure this quickly and consistently across every report you create.

- A **Use the template builder** — select from pre-built damage categories (roof, siding, gutters, interior, etc.) to build your summary structure.
- B **Fill in the details** — each section prompts you for specific findings. Type your observations into the fields.
- C **Add freeform notes** — anything not captured by the template can be typed into the open notes area.

Keep it factual: Write what you observed, not what you conclude. "Three missing shingles along the north ridge" is stronger than "significant storm damage." Let the photos carry the story — the summary ties it together.

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COMPRESSION PRO

Set Your Photo Quality

Before exporting, use the **compression dial** to control how large your finished PDF will be. Higher quality means larger file size. Lower quality means a smaller file that emails faster.

WHEN TO USE HIGH QUALITY

Use maximum quality when the PDF is going into a permanent claim file, to a carrier who requires full-resolution documentation, or when printing.

WHEN TO COMPRESS

Reduce compression when emailing directly to a homeowner, sharing via text, or uploading to a portal with a file-size limit. Medium quality is invisible to the eye but cuts file size significantly.

9 EXPORT

Export Your Finished PDF Report

When your photos, captions, annotations, and damage summary are complete, you're ready to generate the PDF. SnapToFile uses your browser's built-in print system — no plugins, no third-party tools.

- A **Click "Export PDF"** — your browser's print dialog will open automatically.
- B **Set Destination to "Save as PDF"** — in Chrome, this is in the top dropdown. In Safari, use the PDF button in the bottom-left.
- C **Turn off headers and footers** — in More Settings, uncheck "Headers and footers" so the browser doesn't add its own text to your pages.
- D **Click Save** — name your file (e.g., "Smith-Claim-24-7781.pdf") and save it to your device.

WHAT YOUR PDF CONTAINS

Cover Page

Your logo, company info, insured name, address, claim number, and date.

Photo Pages

Two photos per page, each with its caption beneath it. Annotations printed in place.

Your PDF is named automatically based on your report information — no need to rename it before saving.

PRO TIPS — FROM 20 YEARS IN THE FIELD

Shoot first, annotate second

Take all your photos in the field without stopping to mark them up. Upload everything, then annotate in a single focused pass. You'll move faster and annotate more consistently.

Caption every photo

A photo without a caption makes the adjuster or reviewer stop and interpret it themselves. One sentence — location + what it shows — eliminates questions and supplements requests.

Use the magnify tool on hail

Hail hits on shingles are often small and easy to miss in a standard photo. Use the Magnify annotation to zoom in on a representative hit so it's impossible to overlook in print.

Start a new session for each claim

SnapToFile saves your current session in your browser. When you start a new claim, use the "New Report" option to clear the session — don't let one claim's photos bleed into the next.