

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Add New Lines

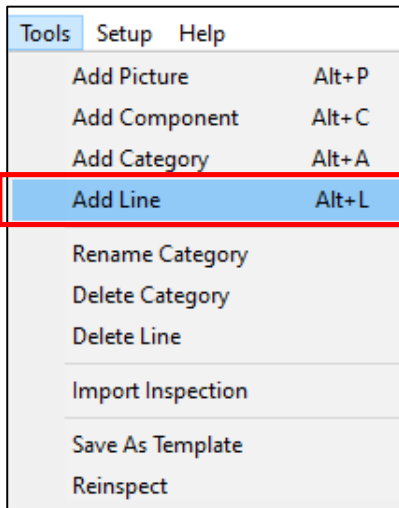
This step by step How To article explains how to add new lines into your inspections.

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

HOW TO: Add New Lines

You can make changes to your inspections and templates. One of the changes you can make is adding in new lines.

1. The first step is to click on Tools->Add Line.



2. The 'Add Line' window will appear. Click on the 'Type:' dropdown to pick what type of line you want to add in. The different line types to choose from are below:

NOTE: The most commonly used line types are the '1 Question/Answer' and 'Rating, Prompt, Note'. Also, not all line types are compatible with the app.

- 1 Question/Answer
- 2 Question/Answer
- 3 Question/Answer
- Yes/No
- Standalone Note
- Checkboxes
- Option List
- Text
- Page Break
- Signature Line
- Rating, Prompt, Note
- Component Placeholder

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- Once you select the type of line you want to add in, you'll be able to give specific properties to that line. For this example, we are going to select a '1 Question/Answer' line.
- With this line type we need to give the new line a name in the 'Screen Prompt'. We also need to decide if we want a Rating and/or a Note to show up on the line by checking/unchecking the boxes in the lower left corner. The last thing to decide is where you want the line to show up in the line order. You decide this by selecting the line in the right column that you want the new line to show up after.

The 'Add Line' dialog box is shown with the following details:

- Line Type:** 1 Question/Answer
- Screen Prompt:** New Line Item:
- Report Prompt (If different from screen):** (Empty)
- Insert after:** Lawn Sprinklers: (Selected)
- Checkboxes:** Show Rating, Show Note
- Buttons:** OK, Cancel

- Once you've entered the information you want, simply click on 'OK' and the new line will be added in.

☰	▼	Exterior Surface Drain:	▼	Note	▼
☰	▼	Fences:	▼	Note	▼
☰	▼	Lawn Sprinklers:	▼	Note	▼
☰	▼	New Line Item:	▼	Note	▼

Making the New Line Permanent

- By going to Tools->Save as Template you can create a new version of your template that includes the new line(s) that you added in. This makes it so that if you want this to be a permanent change you only need to walk through the process one time.