

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Add a New Category

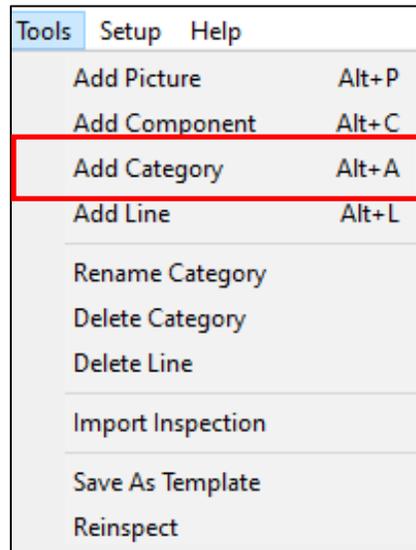
This step by step How To article explains how to add a category into your inspections.

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

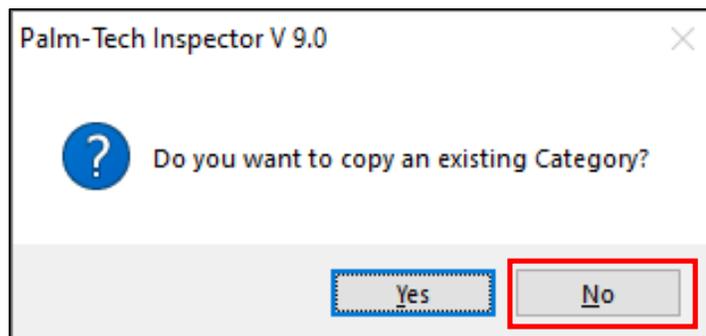
HOW TO: Add a New Category

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

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



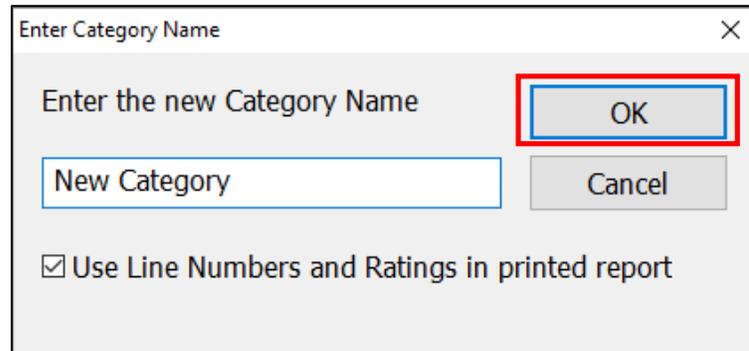
2. Next, you will be prompted with the following question 'Do you want to copy an existing category?'. If you click on 'Yes' you will be able to make an exact copy of an existing category and then give it a new name. If you select 'No' you will be able to add in a new, blank category. Click on 'No'.



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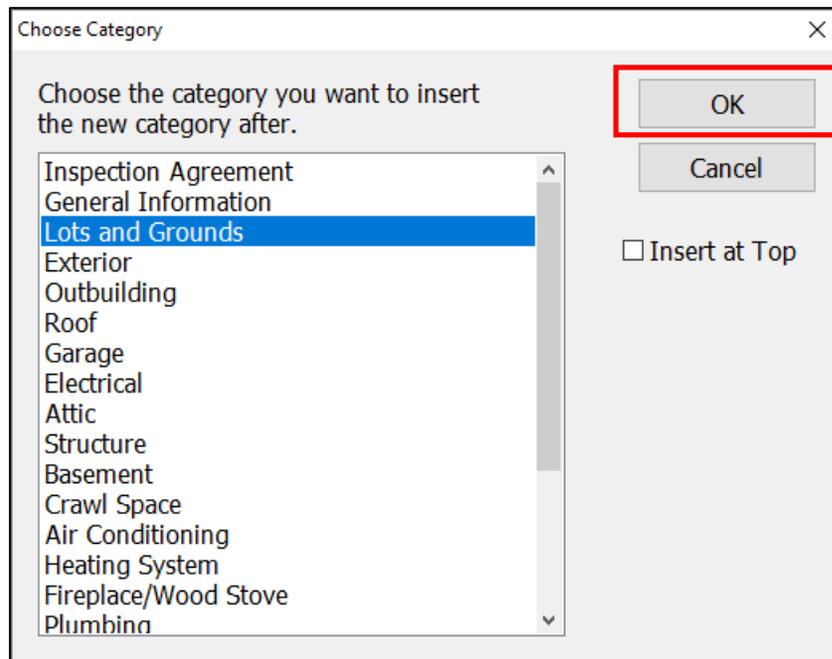
- Next you can enter the new category's name. For this example, we'll call it 'New Category'. Notice there is a box at the bottom to use line numbers and ratings in the new category. If you are adding a category with only text, such as an Inspection Agreement, you'll most likely want to uncheck this box. For this example, we'll leave it checked.

Click on 'OK' when finished.



The screenshot shows a dialog box titled "Enter Category Name" with a close button (X) in the top right corner. The main text reads "Enter the new Category Name". Below this is a text input field containing "New Category". To the right of the input field are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red rectangular border. Below the input field and buttons is a checked checkbox with the label "Use Line Numbers and Ratings in printed report".

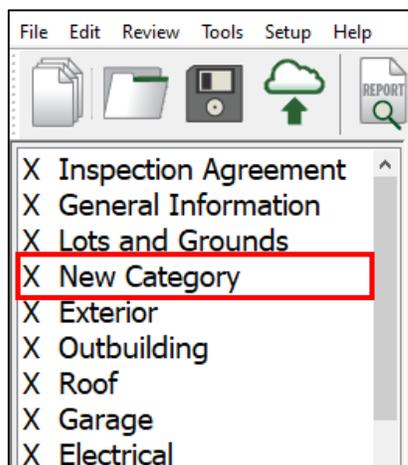
- Now pick where you want the new category to show in the category list. Click on the category you want the new category to appear after (or click 'Insert at Top'). Click 'OK' when finished.



The screenshot shows a dialog box titled "Choose Category" with a close button (X) in the top right corner. The main text reads "Choose the category you want to insert the new category after.". Below this is a list box containing the following categories: "Inspection Agreement", "General Information", "Lots and Grounds", "Exterior", "Outbuilding", "Roof", "Garage", "Electrical", "Attic", "Structure", "Basement", "Crawl Space", "Air Conditioning", "Heating System", "Fireplace/Wood Stove", and "Plumbing". The "Lots and Grounds" category is highlighted in blue. To the right of the list box are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red rectangular border. Below the buttons is an unchecked checkbox with the label "Insert at Top".

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5. The category has now been added. From here you can add in new lines and components to set the category up with the exact information that you want.



6. By going to Tools->Save as Template you can create a new version of your template that includes the new category(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.

