

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Add a Signature Line To a Report

This step by step How To article explains how to add a signature line to a template so you can collect an electronic signature on your report

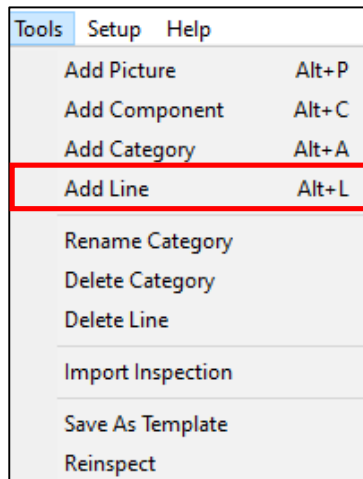
For a complete list of available How To documents, visit the Support section of our website: www.palm-tech.com/support/

HOW TO: Add a Signature Line to a Report

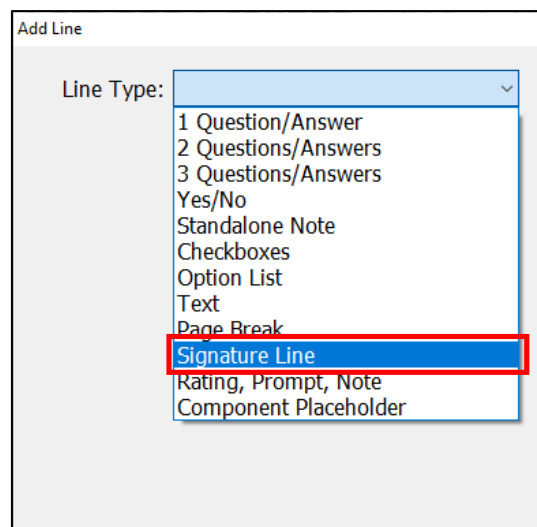
There are two main ways of adding in a signature line which are: (1) By adding in a standalone signature line and (2) By adding a component such as Inspection Agreement that has a signature as part of it.

Adding in a Standalone Signature Line

1. You can add a signature line anywhere in a report. The first step in doing this is to go to Tools -> Add Line in the main Palm-Tech program.

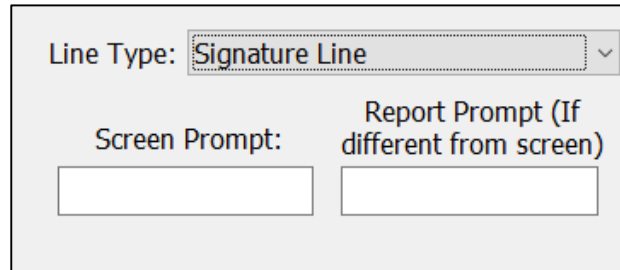


2. Next, we need to select 'Signature Line' for the Line Type.



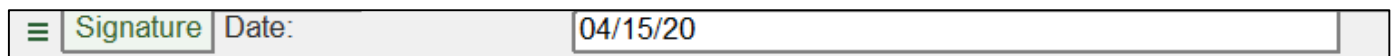
HOW TO: Add a Signature Line to a Report

3. Once you have 'Signature Line' selected you have the option to enter a *Screen Prompt* and a *Print Prompt*. If you leave this blank, then it will default to say 'Signature'.



The dialog box shows a dropdown menu for 'Line Type' set to 'Signature Line'. Below it are two text input fields: 'Screen Prompt:' and 'Report Prompt (If different from screen)'. Both fields are currently empty.

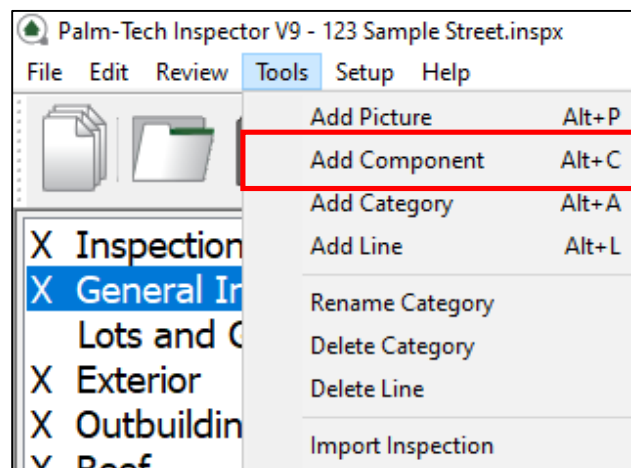
4. Once you have the prompt set to what you want, you can then select where you want the line to be added to. After selecting the spot, click on 'OK'.
5. You have now added a Signature Line into the report that has a spot for the date as well.



The report header displays a signature line with the text 'Signature' in a green box, followed by 'Date:' and the date '04/15/20' in a white box.

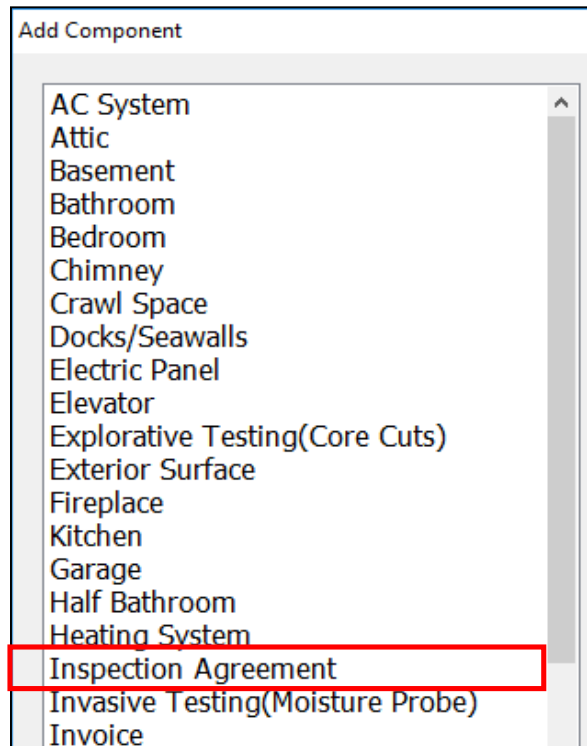
Adding in a Component with a Signature Line

1. You can add in a component such as an Inspection Agreement that has a Signature Line as part of it. The first step in doing this is to go to Tools-> Add Component.



HOW TO: Add a Signature Line to a Report

2. On the Add Component window which appears next, select the component that you want to add in.



3. Once you've selected the component you want to add in, in the right column select where you want it to show up in the Category. After selecting the spot, click on 'OK'.
4. You have now added in a component that includes a Signature Line into the report.

