

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Add Abbreviations to Notes

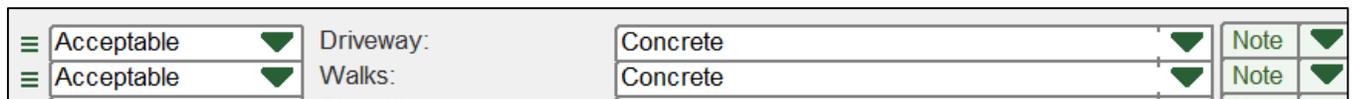
This step by step How To article explains how to add abbreviations to notes.

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

HOW TO: Add Abbreviations to Notes

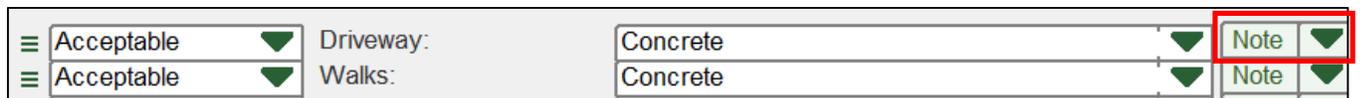
You can add in an unlimited number of items to your descriptions and note dropdowns. There is also no limit to how long each item can be. With some of the longer narratives, you are not able to see the entire comment when you are looking to add it into your report which can be troublesome if you have several longer narratives that all start out the same way. To help with this, you can add abbreviations to the front of the items in your dropdown list to serve as a quick way for you to know which note is which.

1. The first step to adding abbreviations to your notes is to go to the line that contains the note/description you want to add an abbreviation to. For this example, we'll navigate to the Driveway line in Lots and Grounds.



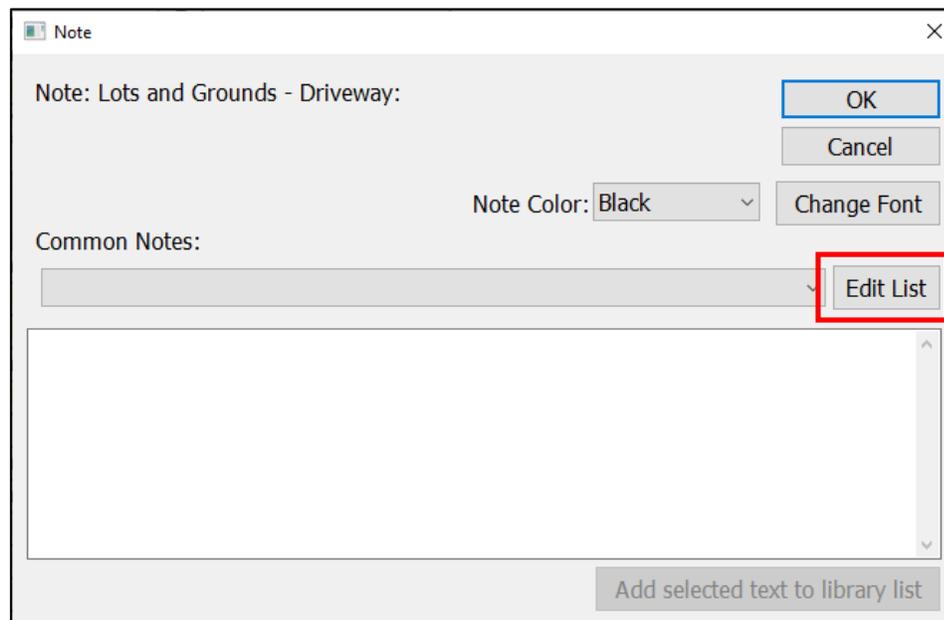
☰	Acceptable ▼	Driveway:	Concrete ▼	Note ▼
☰	Acceptable ▼	Walks:	Concrete ▼	Note ▼

2. Next, we'll click on the 'Note' piece to bring up the 'Edit Note' screen.



☰	Acceptable ▼	Driveway:	Concrete ▼	Note ▼
☰	Acceptable ▼	Walks:	Concrete ▼	Note ▼

3. On the 'Edit Note' screen, click on the 'Edit List' button.



Note: Lots and Grounds - Driveway:

OK

Cancel

Note Color: Black ▼ Change Font

Common Notes:

▼ Edit List

Add selected text to library list

HOW TO: Add Abbreviations to Notes

4. Here you will see a list of all the items in the Driveway 'Note' dropdown list.

The 'Edit List' dialog box displays a list of items. The list contains the following text:

- Damaged or deteriorated, recommend estimate for repair or replacement by a licensed contractor
- Heavy cracks in surface
- Heaves in concrete causing trip hazard
- Uneven settling
- Concrete pitted and chipped
- Due to snow or ice cover the comments reflect only the visible portion of the driveway
- A qualified contractor is recommended to evaluate and estimate repairs

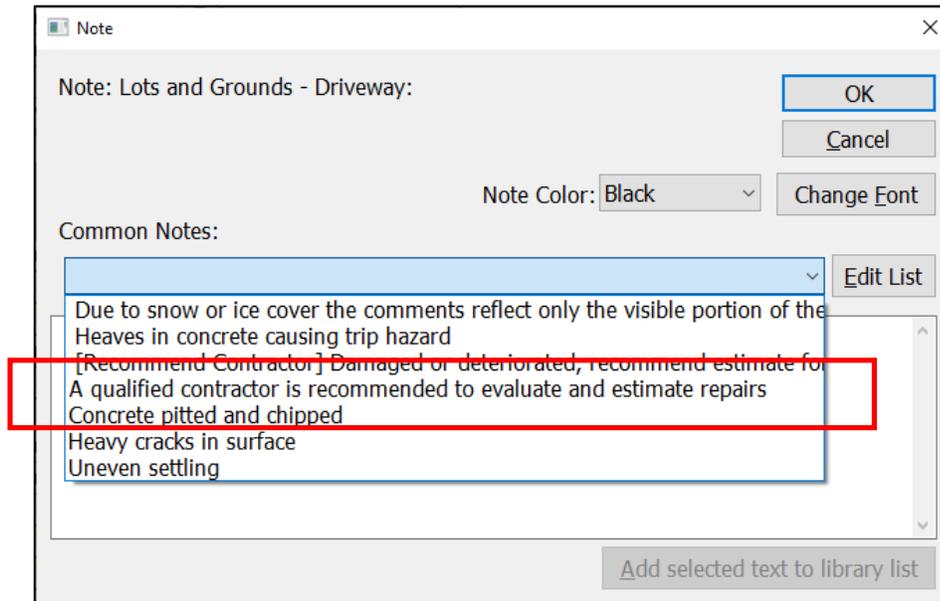
Below the list are two buttons: 'Add New Item' and 'Delete Selected Item'. A text input field is empty. Below the input field, a note reads: 'While entering a list item, press CONTROL + S to add that item to the list'. At the bottom, there are three input fields: 'List Type' (set to 'Note'), 'List Category' (set to 'Lots and Grounds'), and 'List Prompt' (set to 'Driveway'). A checkbox labeled 'Let program sort list' is checked. A 'Close' button is located at the bottom right.

5. To add an abbreviation to a note, you need to add a set of brackets [] with the abbreviation text in-between them at the front of the note. For example, lets add the abbreviation [Recommend Contractor] to the note; *Damaged or deteriorated, recommend estimate for repair or replacement by a licensed contractor*. To do this, we would modify the note to be displayed as: [Recommend Contractor] *Damaged or deteriorated, recommend estimate for repair or replacement by a licensed contractor*.

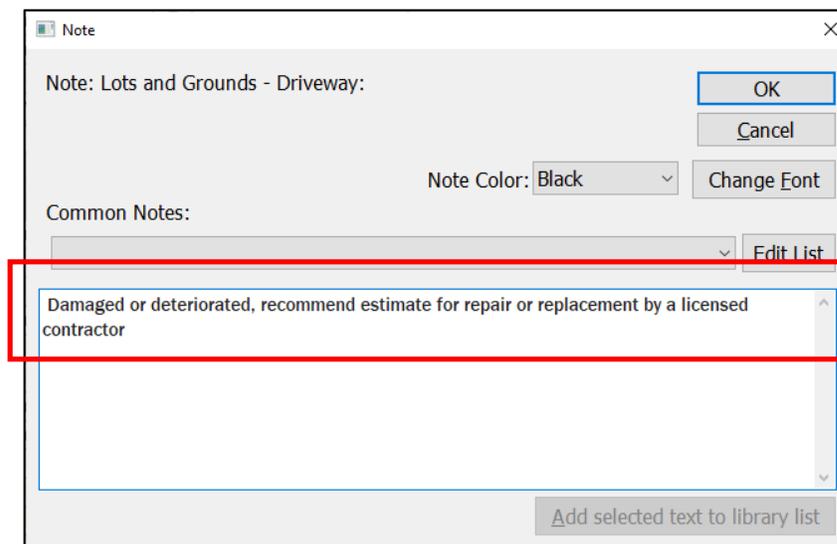
The 'Edit List' dialog box is shown with the first item in the list highlighted in blue. The item text is: '[Recommend Contractor] Damaged or deteriorated, recommend estimate for repair or replacement by a licensed contractor'. A red rectangular box highlights this entire line of text. The rest of the dialog box, including the 'Add New Item' and 'Delete Selected Item' buttons, the empty input field, the control tip, and the bottom settings, is identical to the previous screenshot.

HOW TO: Add Abbreviations to Notes

- Once you have added in your abbreviations, click on 'Close'.
- Now, when you look at your dropdown list, you'll see the note contains the abbreviation at the beginning of it.



- If you select this item from the dropdown, it will insert the note without the abbreviation.



- You can add in an unlimited number of abbreviations for both descriptions and notes. The process for adding them in and how they work is identical on the PC and the App.