

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Add an Inspection Agreement

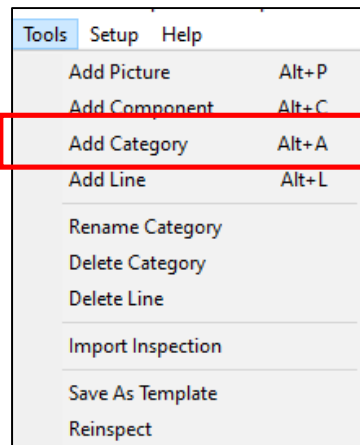
This step by step How To article explains how to add an inspection agreement to your inspections/templates.

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

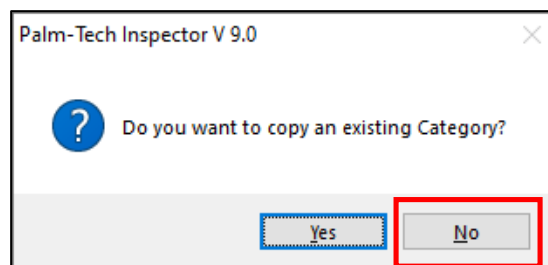
HOW TO: Add an Inspection Agreement

You can add in your inspection agreement so that it is part of every inspection report you create with Palm-Tech.

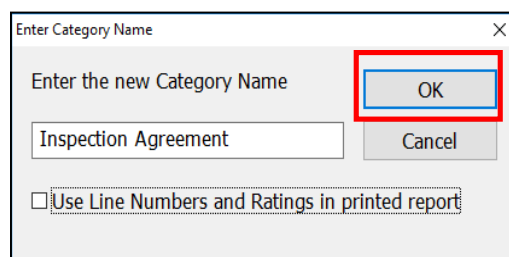
1. The first step for adding in your agreement is to add a new category for it. To do this click on Tools->Add Category.



2. Next, you will be prompted with the following question 'Do you want to copy an existing category?'. Click 'No'.

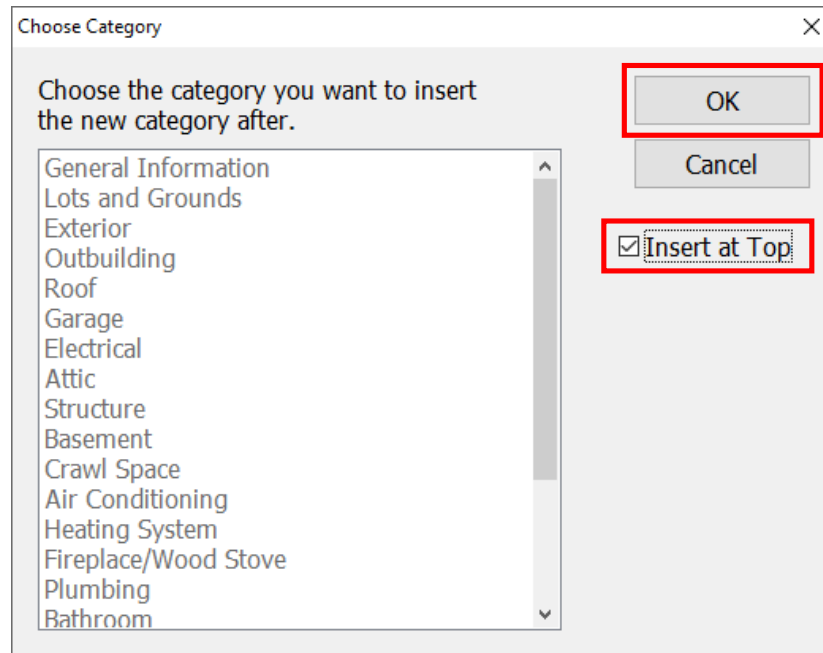


3. Next you can enter the new category's name. For this Example, we'll call it 'Inspection Agreement'. You'll also want to uncheck the box for 'Use Line Numbers and Ratings in printed report'. Click on 'OK' when finished.

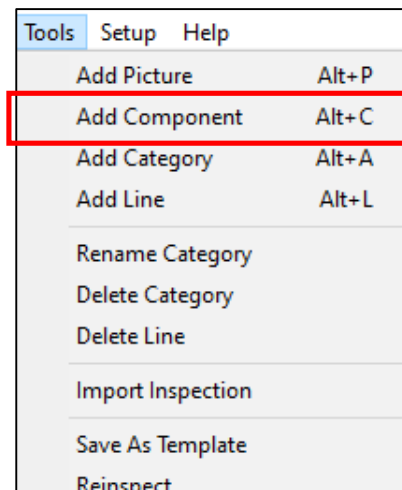


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4. Now pick where you want the new category to show in the category list. Click on the category you want the new category to appear under (or click 'Insert at Top'). Let's click 'Insert at Top' so that it is the first category in the report. Click 'OK' when finished.

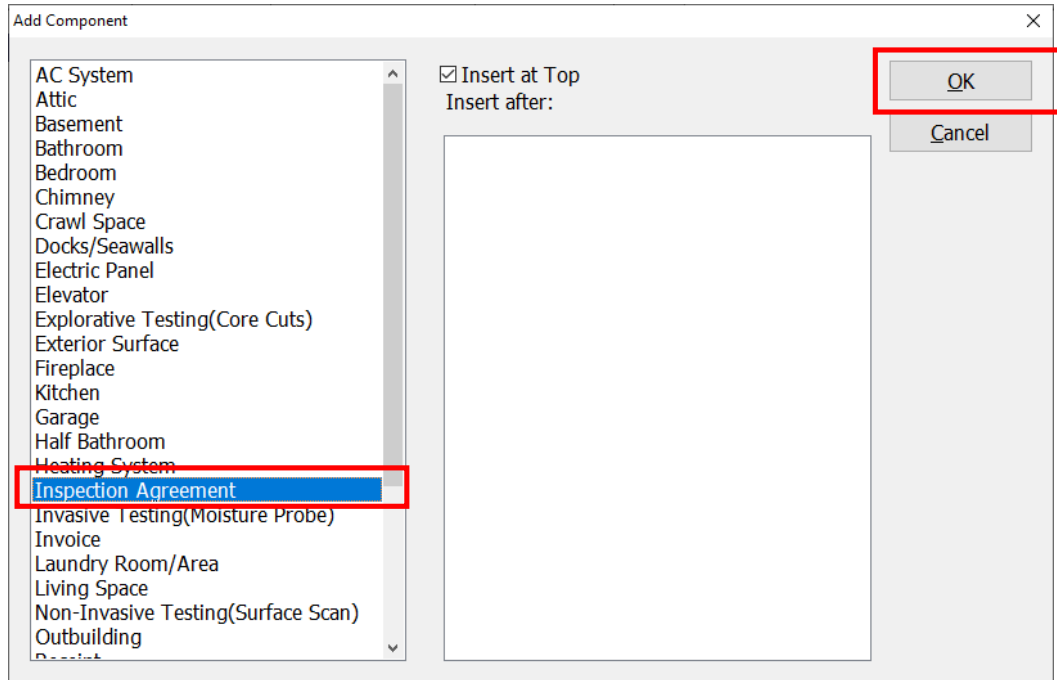


5. The category has now been added. Next, we need to add in the inspection agreement component. To do this, first click on the 'Inspection Agreement' category (you'll notice that it is empty) and then go to Tools->Add Component.

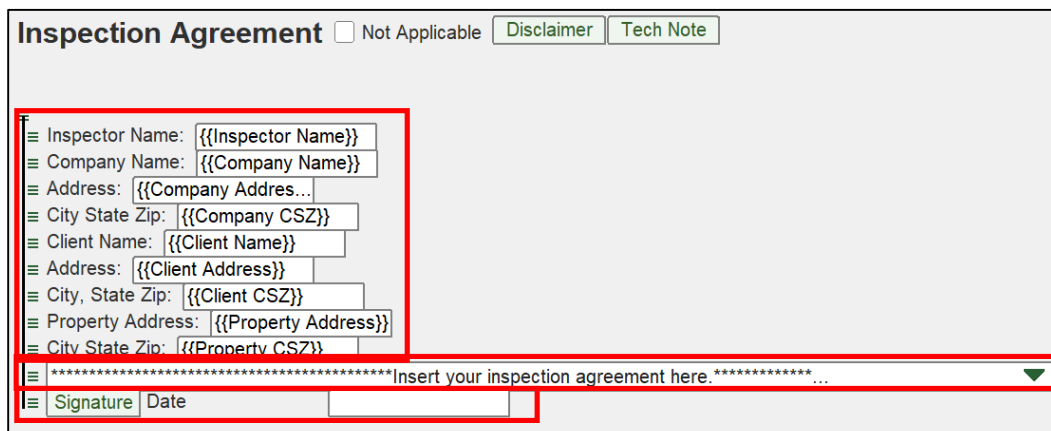


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- On the 'Add Component' screen select the 'Inspection Agreement' component from the component list and then click 'OK' to continue.

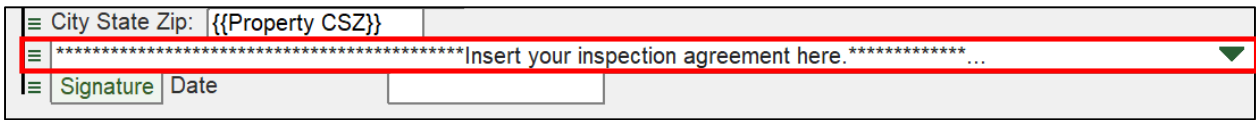


- The 'Inspection Agreement' component will now be added into the category. The component is broken up into 3 sections. The first section includes basic information about your company and the property you are inspecting. It uses merge fields to auto-populate this information from what is entered in the General Information category. The second section is a single line that you can click to add the actual text of your agreement. The final section is a line that includes a spot where you can collect an electronic signature from your client and the date.



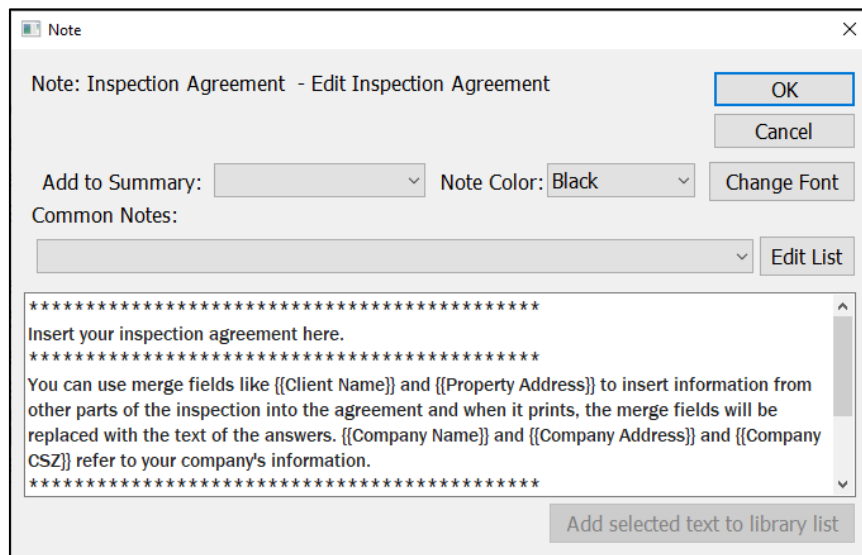
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8. To add in the text of your inspection agreement, click on the line in section two.



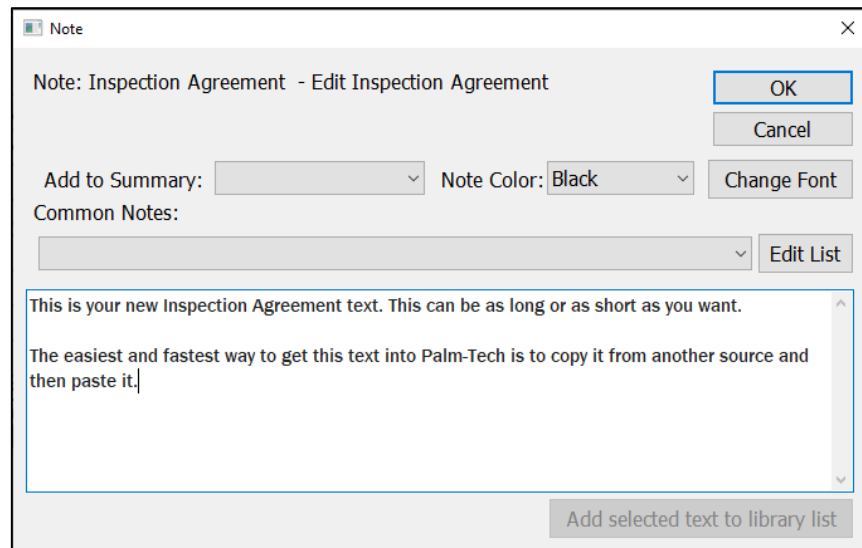
The screenshot shows a form with several fields. A red rectangular box highlights a text entry field containing the text: "*****Insert your inspection agreement here.*****". Above this field is a dropdown menu with the text "City State Zip: {{Property CSZ}}". Below the highlighted field are two more fields labeled "Signature" and "Date".

9. This will bring up the 'Edit Note' screen. By default it includes some information that serves as a placeholder and you can easily remove it by highlighting it and deleting it out. From there you can type in your agreement, or most inspectors will simply copy it from another location (PDF, Word Doc, etc) and paste it in.



The screenshot shows a window titled "Note" with the subtitle "Note: Inspection Agreement - Edit Inspection Agreement". It has "OK" and "Cancel" buttons. Below these are "Add to Summary:" and "Note Color: Black" dropdowns, and a "Change Font" button. Under "Common Notes:" is another dropdown and an "Edit List" button. The main text area contains the following text: "*****
Insert your inspection agreement here.

You can use merge fields like {{Client Name}} and {{Property Address}} to insert information from other parts of the inspection into the agreement and when it prints, the merge fields will be replaced with the text of the answers. {{Company Name}} and {{Company Address}} and {{Company CSZ}} refer to your company's information.
*****". At the bottom right is a button labeled "Add selected text to library list".

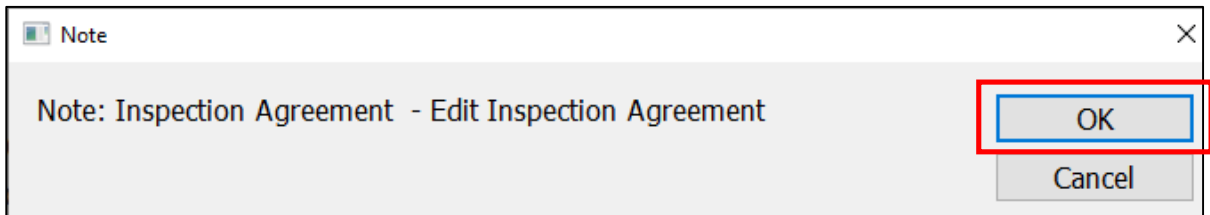


The screenshot shows the same "Edit Note" window. The main text area now contains the following text: "This is your new Inspection Agreement text. This can be as long or as short as you want.

The easiest and fastest way to get this text into Palm-Tech is to copy it from another source and then paste it." The "Add selected text to library list" button is still present at the bottom right.

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10. Once you've added in the text for your agreement, click on 'OK' in the top right corner.



11. Your inspection agreement has now been added. By going to Tools->Save as Template you can create a new version of your template that includes the inspection agreement by default so you will not have to add it in again.