

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Attach a PDF of an Inspection Report to An Email

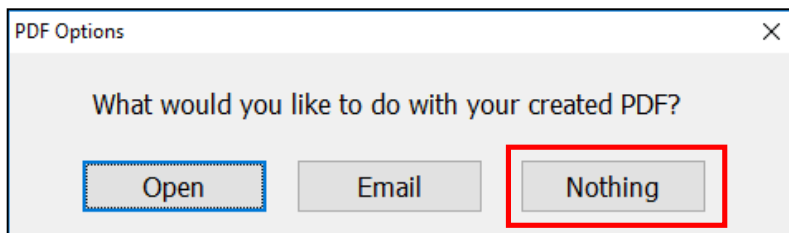
This step by step How To article explains how to attach a PDF of an inspection report to an email.

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

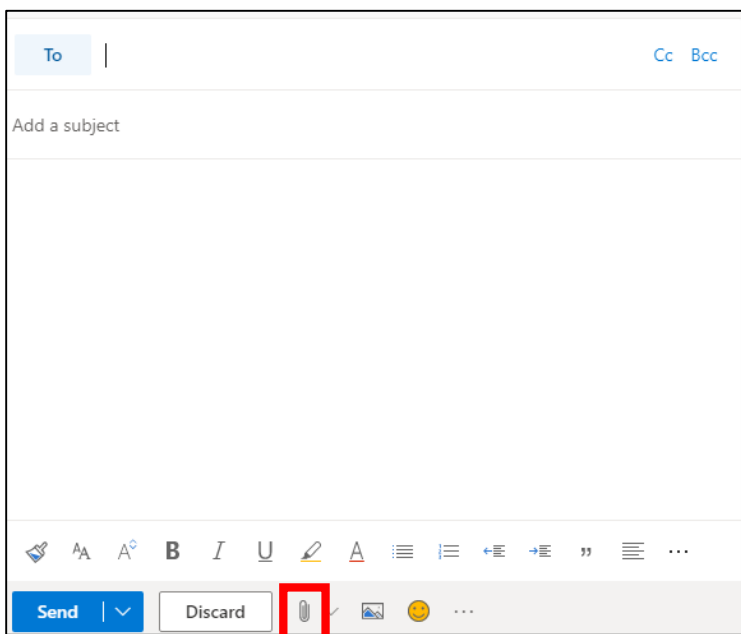
HOW TO: Attach a PDF of an Inspection Report to an Email

When a report is complete you can easily turn it into a PDF that can then be emailed to your client. This document will walk you through how to attach the PDF to an email outside of Palm-Tech.

1. The first step is to click on 'Nothing' after you create the PDF in Palm-Tech.



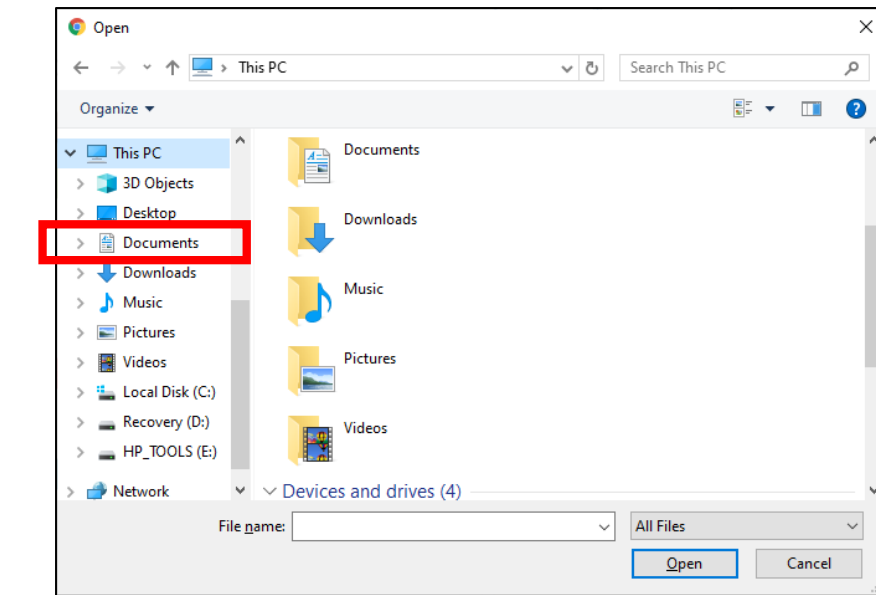
2. This will take you back to the Palm-Tech screen. At this point, the PDF has been created and is ready to be emailed. The next step is to open your Email.
3. Once your Email is open, start a new email just like you would any other time.
4. Now, we need to attach the PDF of the inspection report to the email. To do this, you'll need to click on whatever button in your email (each email works slightly differently, but for many it looks like a paper clip) that will allow you to attach a file.



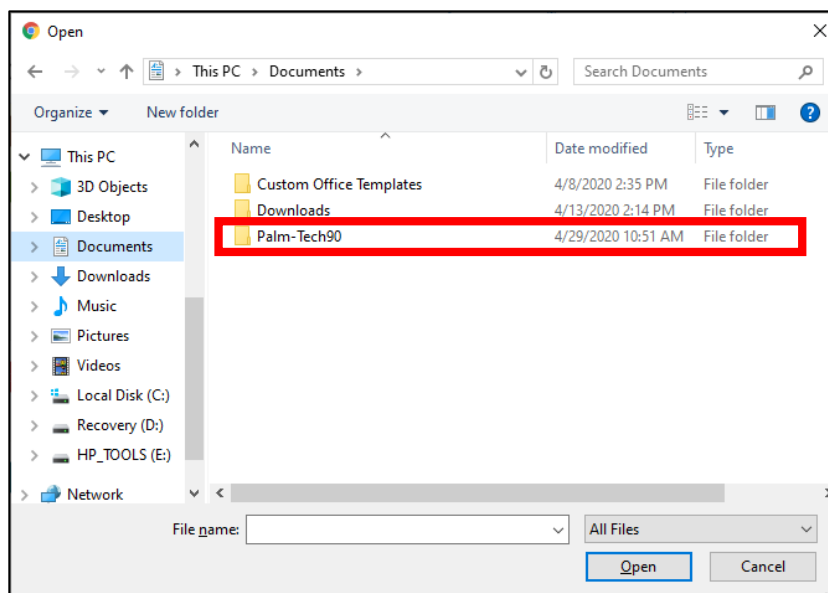
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5. This will bring up a screen that allows you to navigate to find the file you want to attach. When a PDF of a report is created it will go in the same folder that has the inspection file in it. By default, this will be C:\Documents\Palm-Tech90. The window will open to where you last saved a file so you will want to follow these steps to navigate to the Palm-Tech90 folder.

a) On the left-hand side double click on 'Documents'.



b) Next, double click on Palm-Tech90.



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6. Once in the Palm-Tech90 folder click on the file you want to attach. Then click the button that allows you to attach a file in the lower right corner of the window. The name of the button can vary, but typically it will be 'Open' or 'Attach'.

NOTE: It is important that you select the 'PDF' version of the inspection file and not the Palm-Tech Inspector version. If you send the wrong file then your client will not be able to open it to view.

7. From here, all you need to do is modify the rest of the email as desired and send it to your client.

