

PALM▲**TECH**

home inspection software

V E R S I O N 9

HOW TO:

Edit Rating Sets

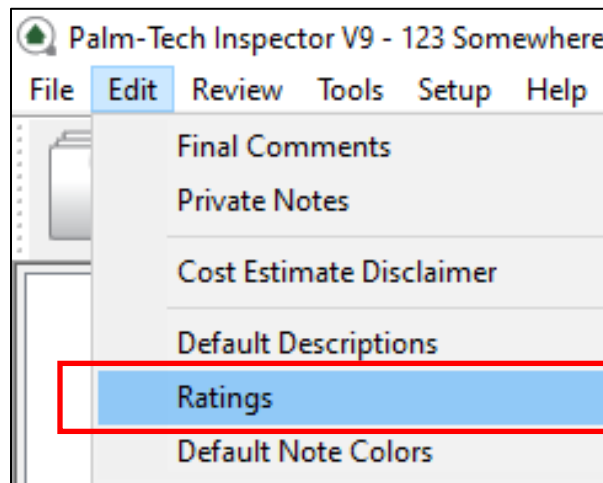
This step by step How To article explains how to edit rating sets.

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

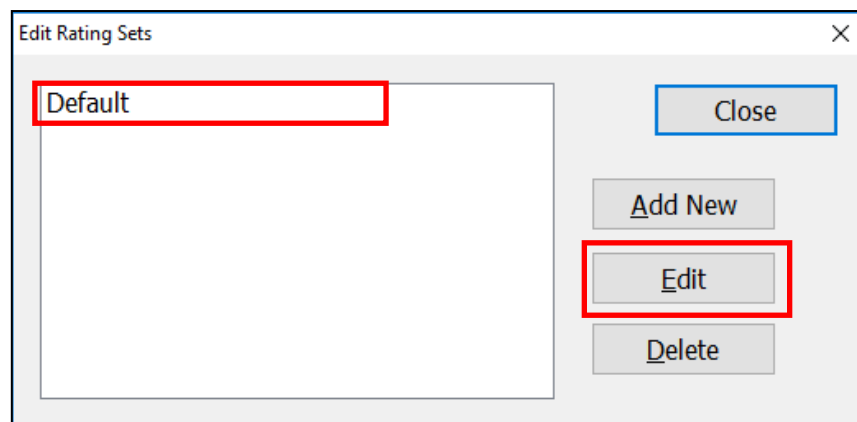
HOW TO: Edit Rating Sets

Palm-Tech comes with the pre-set ratings of: Acceptable, Not Present, Not Inspected, Marginal, Defective and Not Applicable. Each of these ratings have a series of properties associated with them that you can modify to set up the way you want. You can also add in new ratings, remove the standard ones or rename them to create the rating set that works best for you.

1. The first step for modifying your ratings is to open the Palm-Tech program. You can do this by starting a new inspection or opening an existing one.
2. Next, click on Edit->Ratings from the top menu.



3. This brings up the 'Edit Rating Sets' window. Click on 'Default' and then on 'Edit'.



HOW TO: Edit Rating Sets

4. We are now looking at the 'Edit Rating Set' screen. Here you can see all the ratings currently in the rating set. To edit a Rating, click on it and the properties will show up on the right. You can then edit these properties for the selected rating.

The screenshot shows a window titled "Edit Rating Set" with a close button in the top right corner. At the top left, there are two input fields: "Name:" with the value "Default" and "Rating Set ID:" with the value "1". To the right of these is a "Disclaimer:" field containing the text "NOTE: All definitions listed below refer to the property or item listed as inspected on this" and a "Close" button. Below the input fields are two buttons: "Add Rating" and "Delete Rating". A list of ratings is shown on the left, with "Acceptable" selected and highlighted in blue. The list includes: "Acceptable", "Not Present", "Not Inspected", "Marginal", "Defective", and "Not Applicable". To the right of the list, the configuration for the selected "Acceptable" rating is displayed. It includes: "Name:" with the value "Acceptable", "Abbreviation:" with the value "A", and "Rating Color:" with a dropdown menu set to "Black". Below these is an "Explanation:" text area containing the text "Functional with no obvious signs of defect." Underneath the explanation are several checkboxes: "Indicates item is not present (prints on report)", "Indicates item is not applicable and should not print", "Indicates item was not inspected (prints on report)", "Use value for scoring" (with an empty input field), "Include as being inspected for 'Required' edits" (checked), "Requires Note", and "Create Summary of items marked with this rating". At the bottom right, there is a "Summary Disclaimer" text area.

5. Here is a breakdown of what each option does:
- Name – This is the name of the rating. To change it, simply click in the box and make the change.
 - Abbreviation – This is the rating abbreviation. If your ratings are set to show as checkboxes on the report, this is what will show up above the checkbox to distinguish between ratings.
 - Rating – Notes on lines marked with this rating will default to this color.
 - Explanation – This is the text that will appear in the definitions section of the report defining what a particular rating means.
 - Indicates item is not present – This option is checked for the Not Present rating.

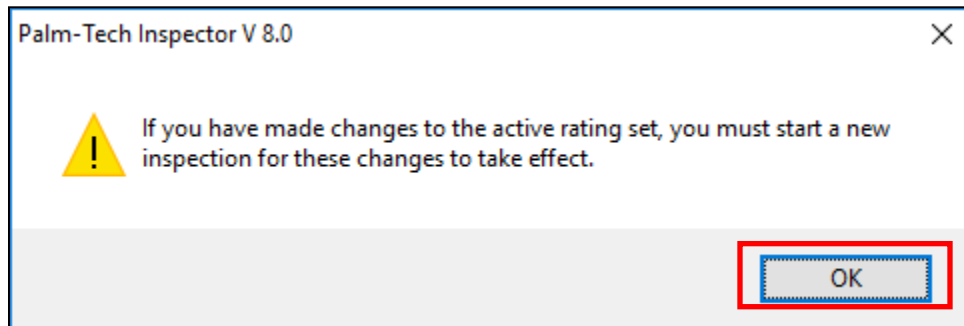
HOW TO: Edit Rating Sets

- f. Indicates item is not applicable and should not print – This option is checked for the Not Applicable rating. It makes it so that line items marked with this rating will not show on the report.
 - g. Indicates item was not inspected – This option is checked for the Not Inspected rating.
 - h. Use value for scoring – This option is not used with home inspection templates and should not be used.
 - i. Include as being inspected for 'Required' edits – This option is used for completeness checks and edit checks. If a rating that has this option checked is selected on a line, then no additional information will need to be filled out for the line to be considered 'complete'.
 - j. Requires Note – Check this item if you don't want a line marked with this rating to be considered complete unless a note is entered.
 - k. Create Summary of items marked with this rating – If this is checked, then a summary will be created for all items marked with the given rating.
 - l. Summary Disclaimer – This is the text that will show up at the top of the summary created for the given rating
6. You can add a new rating by clicking on the 'Add Rating' button. You can delete a rating by first clicking on it and then clicking on 'Delete Rating'.

The screenshot shows the 'Edit Rating Set' dialog box. At the top, there is a 'Name' field containing 'Default' and a 'Rating Set ID' field containing '1'. To the right is a 'Disclaimer' text area with the text 'NOTE: All definitions listed below refer to the property or item listed as inspected on this' and a 'Close' button. Below this, there are two buttons: 'Add Rating' and 'Delete Rating', which are highlighted with a red box. Underneath these buttons is a list of ratings: 'Acceptable' and 'Not Present'. The 'Acceptable' rating is selected, and its details are shown to the right: 'Name: Acceptable', 'Abbreviation: A', 'Rating Color: Black', and 'Explanation: Functional with no obvious signs of defect'.

HOW TO: Edit Rating Sets

- When you are finished with your changes click 'Close' and then 'Close' again. A message will pop up that says you must start a new inspection for your changes to take effect. This means that the changes you made to your ratings will only impact future inspections that you start and not previous inspections. Click 'OK'.



- The next time you start a new inspection your changes will be there.