

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Email a Report from the App

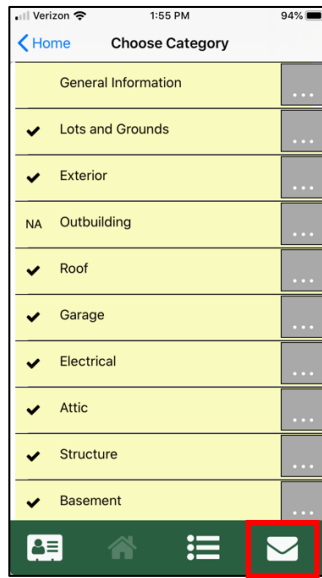
This step by step How To article explains how to email an inspection report from the Palm-Tech app

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

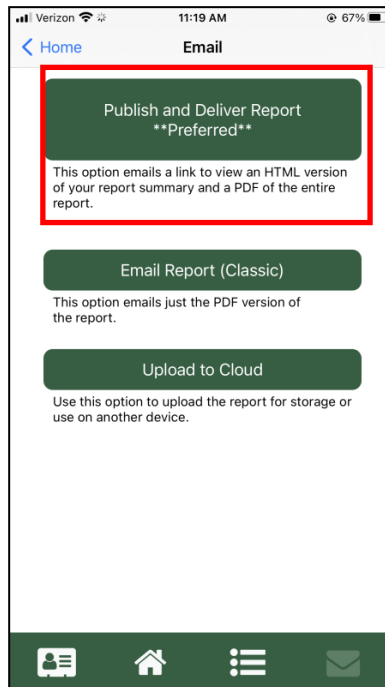
HOW TO: Email a Report from the App

Palm-Tech 9 allows you to send an email containing an HTML link of your report summary and a PDF of the entire report. This document will walk you through sending this email to your client.

1. When you are ready to email the inspection, tap the envelope button on the navigation bar to go to the 'Email' view.

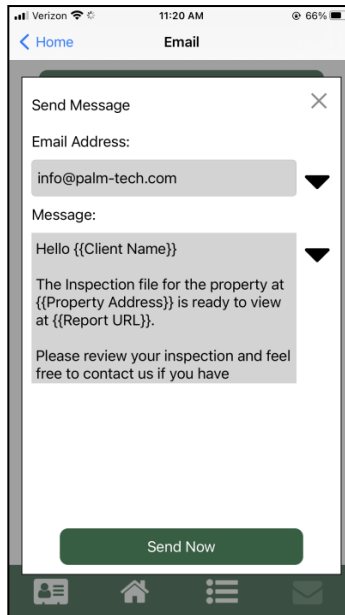


2. On the 'Email' screen, tap 'Publish and Deliver Report' to send an email to your client.

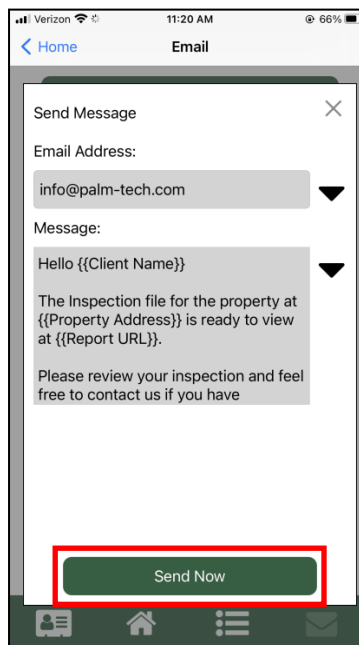


HOW TO: Email a Report from the App

3. On this screen you can enter the email address you want to send the report to as well as enter a message for the email body. Tap the first dropdown list to select your email, the client's email or the agent's email. The second dropdown will bring in a preset message to save you time.

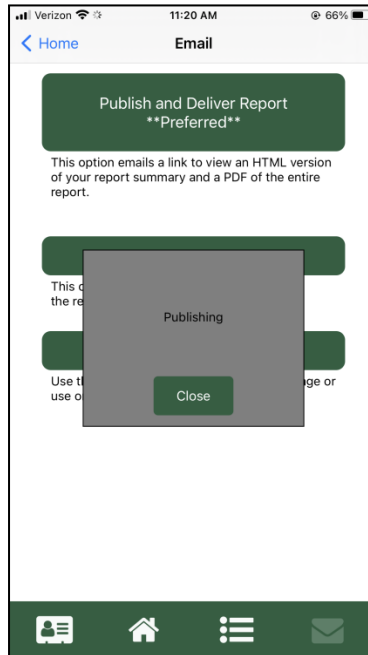


4. Once the email address and message are entered, tap 'Send Now.'

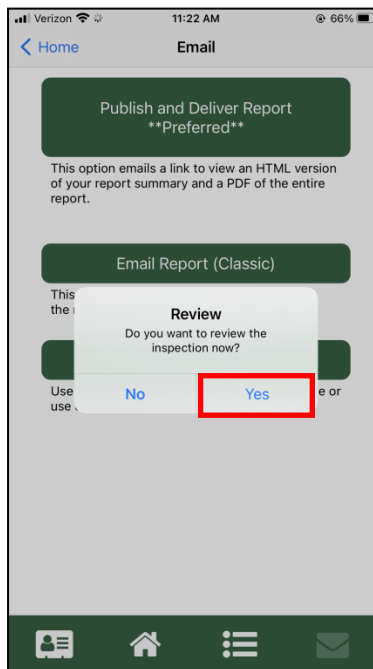


HOW TO: Email a Report from the App

- The inspection will first be uploaded and then another box will appear letting you know the report is being published.



- When the process is complete you will see a pop up on the screen asking if you'd like to review your published inspection. Tap 'Yes' to review the HTML link.



HOW TO: Email a Report from the App

- The app will take you to your published report where you can review what your client will see when they follow the HTML link sent to them. You can access the full PDF of the report by tapping on the 'PDF' tab.

