

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Install Palm-Tech on a Windows PC

**This step by step How To article explains how to install
Palm-Tech 9 on a Windows PC**

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

HOW TO: Install Palm-Tech On a Windows PC

Based on your PC and internet browser, the steps may vary slightly when installing a program to your PC. For example, running the download may be different with Edge than with Firefox or Google Chrome.

1. First, open your Palm-Tech 9 setup email. This is the email you received from Palm-Tech when you first got started with Palm-Tech 9.

Follow the steps below to set up Version 9. Detailed instructions for each step are listed below.

- A. Install to your Windows PC
- B. Install the App to your mobile device
- C. Log in and set up the Palm-Tech portal
- D. Close and restart the PC and mobile app

Installing to a Windows PC

1. Download and then 'Run' the Palm-Tech Version 9 installation from here: <https://www.palm-tech.com/downloadLatestV9>
2. Follow the onscreen prompts to complete the installation process.
3. When installation is finished, double click on the new Palm-Tech icon on your desktop.
4. Now you need to license the program to you. To do this, click on the 'Support' button in the bottom left corner of the shell.
5. Next, click 'Get/Reset License' in the bottom middle of the screen.
6. The program will ask if you have a username and password issued by Palm-Tech, click 'Yes'.
7. Enter your username and password as shown below and click 'Continue':
NOTE: The username and password are case sensitive and must be entered exactly as you see below. It may be easiest to copy and paste into the program. You will also need an internet connection to complete the licensing.
User Name: Inspector_123
Pass: abc123
8. If the username and password are entered correctly, you'll see a window that says the license was successfully retrieved, click 'OK'.
9. In the top right corner of the shell, the program should now show that it is licensed to you.
10. You are now finished with the PC installation.

Installing the Palm-Tech App on an iPhone/iPad/Android Device

If you use the Palm-Tech app on an iPhone, iPad or Android device then follow these instructions to install the app. If you do not plan on using the app, you are finished with the installation.

1. You can install the app by going to the Apple App Store (iPhone/iPad) or the Google Play Store (Android) and searching for **Palm-Tech Plus** or by clicking one of these links:
 - iPhone/iPad: <https://apps.apple.com/us/app/palm-tech-plus/id1493575022>
 - Android Phone/Tablet: <https://play.google.com/store/apps/details?id=com.palmttech.inspector>
2. Once the app is installed, open it, and walk through the initial setup screens.
3. When you see the main screen (it has 6 buttons on it) tap on the bottom button for 'Connect to Portal'.
4. Here you need to enter your Palm-Tech User Name and Password which are in step 8 above in the PC installation instructions.
5. Once entered, tap 'Continue'.
6. If the username/password are entered correctly you'll see a message saying it was successful and the app will now be licensed to you.
7. The last step will be to move your template(s)/library from your PC to the app.

Login and Set Up the Palm-Tech Portal

Version 9 includes a brand new business portal which includes scheduling, business reports and more! You can log into the portal from the home screen of the app or the upper right corner of the shell on the PC.

1. Log in to the portal
2. Click the Get Started button in the lower right and follow the instructions
Here is a video that gives an overview of the business portal: <https://www.palm-tech.com/v9/home-inspection-software-training-video-v9-portal-overview>

Please keep this email in case you need to reinstall version 9 to another device in the future.

If you have questions about this process, you can call us at 888-736-2462 or e-mail support at support@palm-tech.com.

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2. Click on the link in this email to begin the installation. To make sure you have the most recent update of the software, use the link provided in the email.

1. Download and then 'Run' the Palm-Tech Version 9 installation from here: <https://www.palm-tech.com/downloadLatestV9>

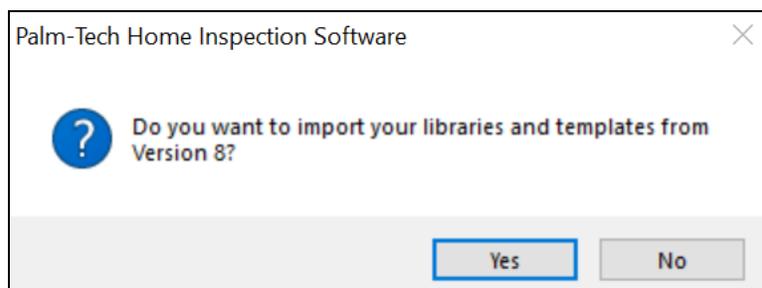
3. Once the program is downloaded, you'll need to 'Run' or 'Save,' then 'Run,' the download. Since it is downloaded from the internet, you'll want to save the download when you have the option. You may not see an option to save, however, and that's fine. In this case, you'll run the download typically by clicking 'Run,' or double-clicking on the download file.



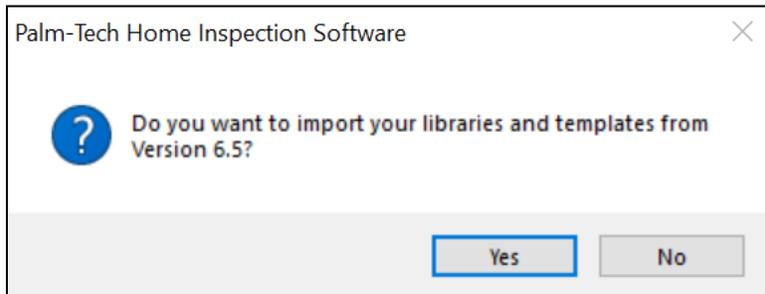
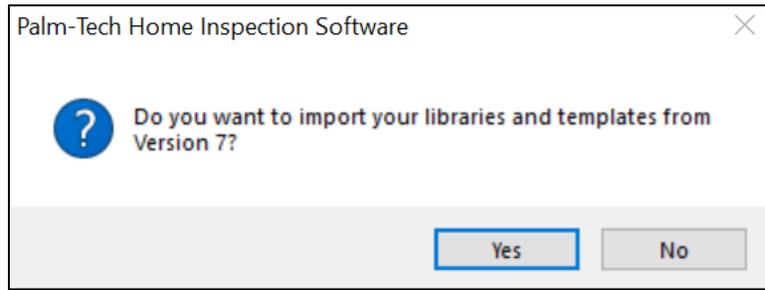
4. Once the installation process begins, follow the onscreen prompts to complete the process. When the installation is finished, you will see an icon for Palm-Tech 9 on your desktop. Double-click on this icon to open the program.



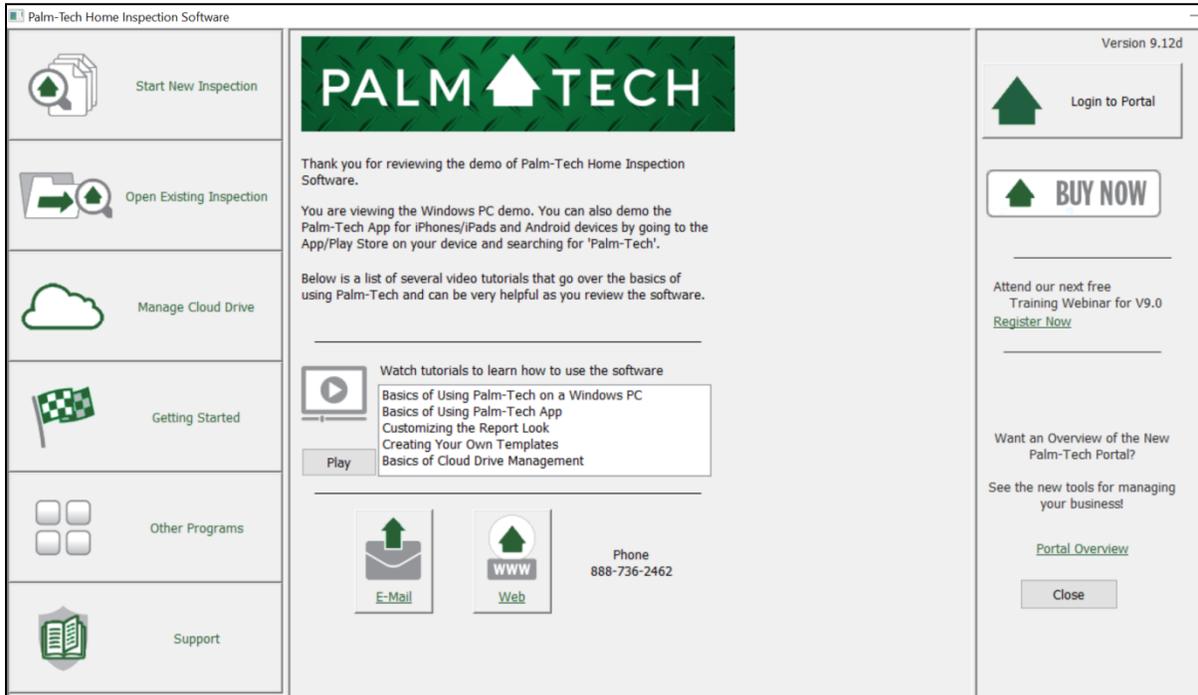
5. If you have a previous version or versions of Palm-Tech installed, you will be prompted to import your templates and libraries. To bring over your templates and libraries from a previous version, click 'Yes' to the prompt. If you do not have a previous version installed, click 'No.'



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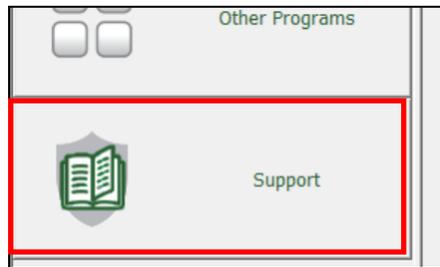


6. Once the program is finished updating your profile, the Palm-Tech shell will open.

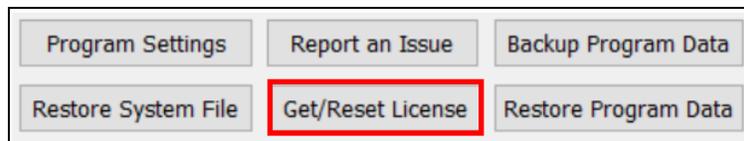


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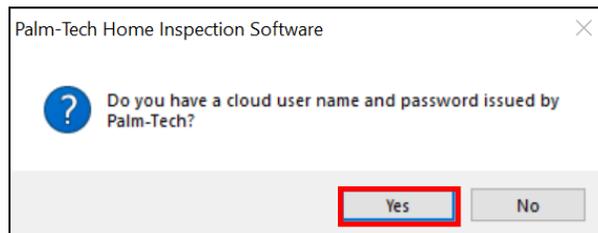
7. Next, you'll need to license the program to you. To do this, you'll click on the Support button in the bottom left corner of the shell.



8. Then, you'll click 'Get/Reset License' in the middle box in the second row.

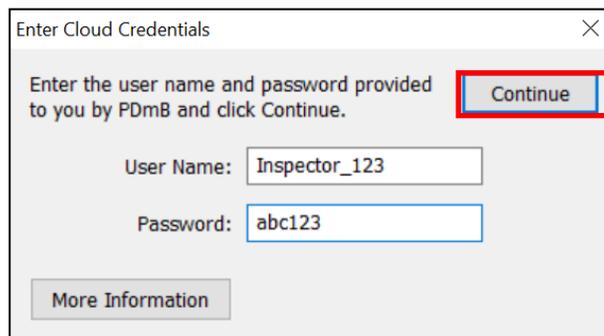


9. The program will ask if you have a username and password issued by Palm-Tech. Click 'Yes.'



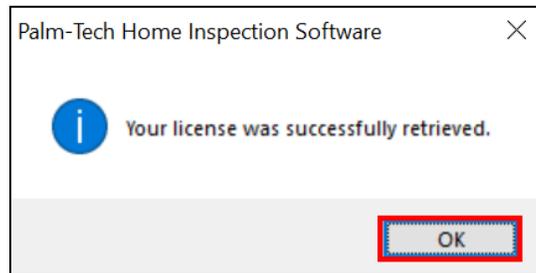
10. Enter the username and password, then click 'Continue.'

NOTE: The username and password are case sensitive, so be sure to enter them exactly as they appear in the setup email. It may be easiest to copy and paste into the program. You will also need an internet connection to complete the licensing.



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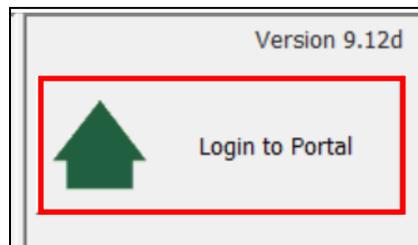
11. If the username and password are entered correctly, you'll see a window that says the license was successfully retrieved. Click 'OK.'



12. In the top right corner of the shell, the program should now show that it is licensed to you.



13. Palm-Tech 9 has successfully been installed and you are now ready to begin using the program. To setup and login to the Palm-Tech Portal, click the 'Login to Portal' on the right side of the Palm-Tech software screen.



14. Once you've logged into the Portal, you can click the 'Get Started' button at the bottom right of the screen. This will walk you through the different things you can do in the Palm-Tech Portal.

