

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Modify Cost Estimates Settings

This step by step How To article explains how to modify various cost estimate settings

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

HOW TO: Modify Cost Estimate Settings

To enter cost estimates you need to check the option in Program Settings for 'Allow Entry of Cost Estimates'. Once this option is selected you have several options to choose from related to cost estimates. Some of the options impact how cost estimates are input and other options impact how they display in the report. This How To will discuss both.

Change How Cost Estimates Are Input

1. The first step is to click on the Program Settings icon from the Toolbar.

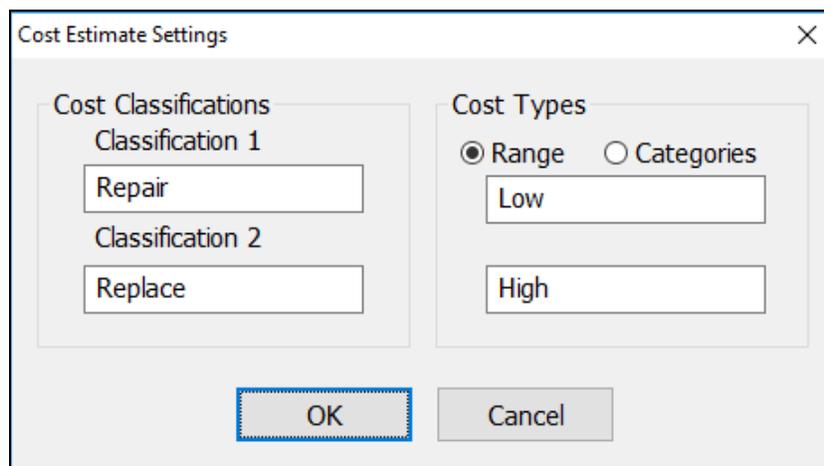


2. The Program Settings window will now appear.

3. Now, click on the 'Cost Estimate Settings' button at the bottom of the window.



4. This brings up the 'Cost Estimate Settings' window.

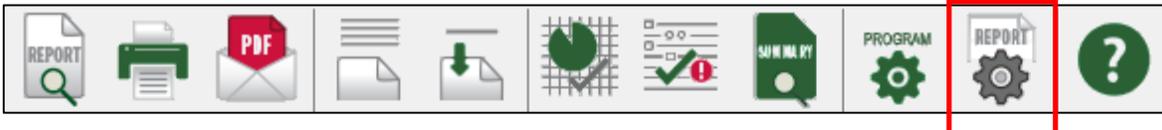


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5. On this screen you can change the 'Cost Classifications', as well as, the 'Cost Types'. For the 'Cost Classifications' you can customize the two options to use the terms you prefer. For the 'Cost Types' you can customize the two options to use the terms you prefer, as well as, decide if you want to input a Range or if you want to have two different cost Categories. By Default, the cost estimates are set to be a Range using High and Low for the type, with the option to choose between a Repair cost and a Replace cost.

Change How Cost Estimates Appear in the Report

1. The first step is to click on the Report Settings icon from the Toolbar.



2. This will bring up the Report Options window. Click on the Page Options tab.



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3. There are two options on this screen that relate to how Cost Estimates appear in the report.
 - a. The First one is 'Show Cost Estimates in Body of Report'. If this option is checked, then any cost estimates you enter will show up in both the body of the report as well as in the Cost Estimate Summary.
 - b. The second option controls where the Cost Estimate Summary, also known as the Cost to Cure (CTC) Summary, shows up in the report. You can have it show before or after the Report Body as well as the Rating Summary.

Report Options

Margins Page Options Header Cover Page Fonts Colors

Options

Create Summaries Show Entered Lines Only

Number Summary Items Show Line Numbers

Use Std Fonts in Summaries Secure PDFs

Combine Rating Summaries

Show Cost Estimates in Body of Report

Use text separator - Include Table of Contents

View photos:

Order

Report Body
CTC Summary
Rating Summary