

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Move a Template to the App from a PC

**This step by step How To article explains how to upload
a template to the app from a PC**

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

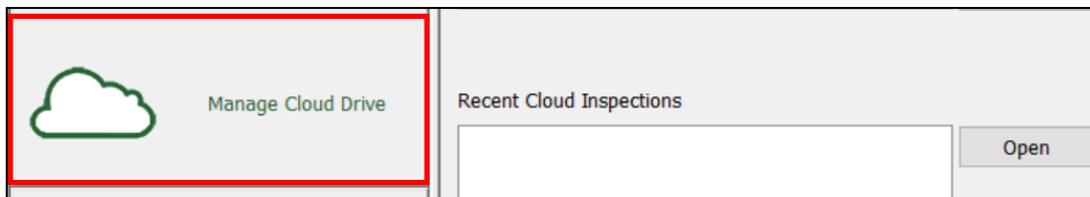
HOW TO: Move a Template to the App From a PC

Right after you create a custom template in Palm-Tech (by going to Tools -> Save as Template,) you will be prompted to send the template to your cloud drive. This is the fastest way to move the template to the cloud drive. You can also manually upload a template to your cloud drive at any point in time so that you can use it on the app. This document will walk you through the process.

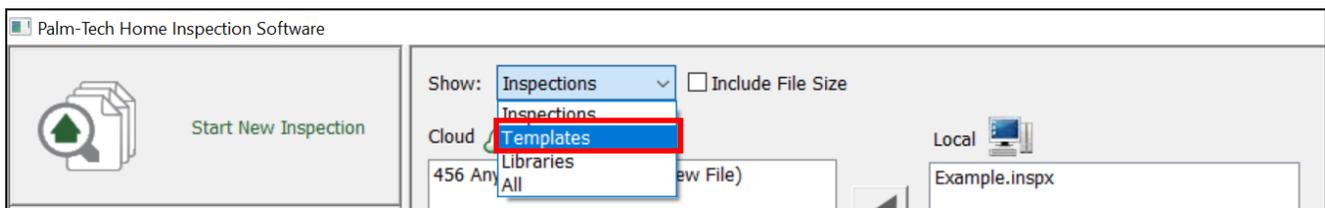
1. The first step is to open the Palm-Tech program by double clicking on the icon on your desktop.



2. Once the main program appears, click on the 'Manage Cloud Drive' tab on the left hand side.

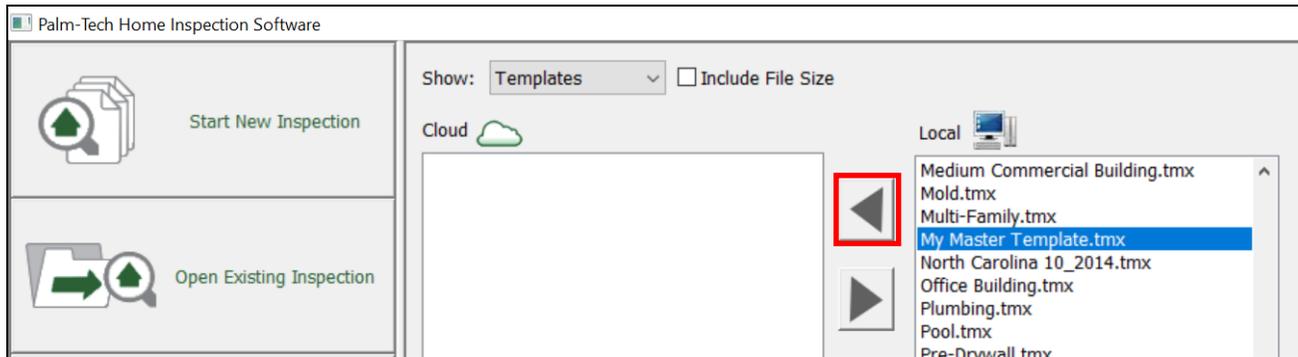


3. Next, click on the dropdown next to 'Show' at the top and select 'Templates.'

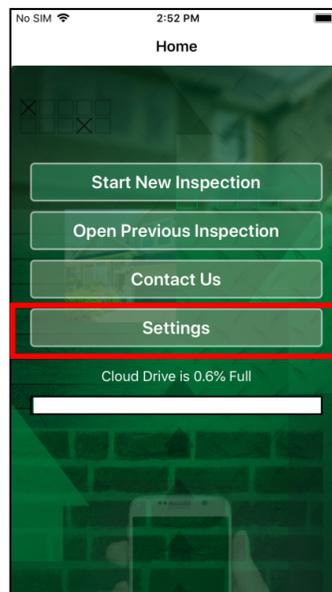


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4. You will now see a listing of all the templates on your local PC and on your cloud drive. The template we will be moving for this example is name 'My Master Template.' To do this, we'll click on 'My Master Template.tmx' under local, then click the top arrow (down the middle of the box) to send it to the cloud drive.

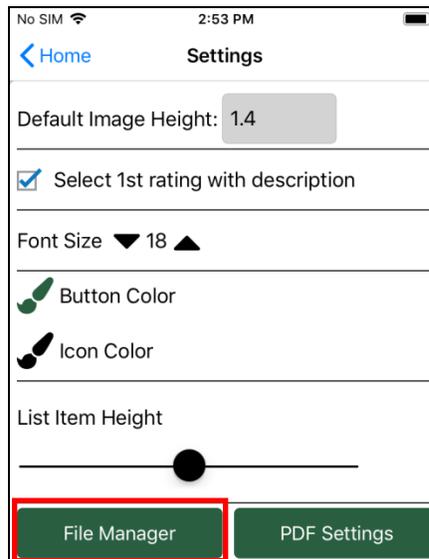


5. A message will appear letting you know the transmission is in progress. This process can take anywhere from a few seconds to a minute depending on the size of the file. Do not click on anything while the 'Transmission in Progress' box is up. Once it is complete, the box will disappear.
6. The template has now been uploaded to your cloud drive. The next step is to open the Palm-Tech App on the device you are moving the template to.
7. From the main screen of the app, tap 'Settings.'

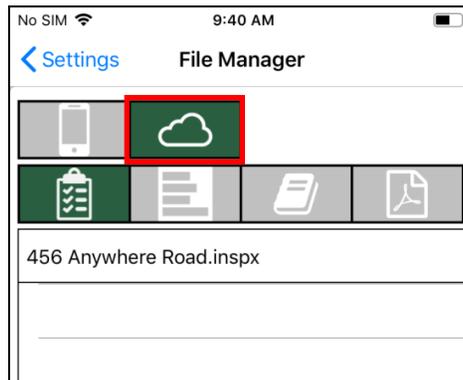


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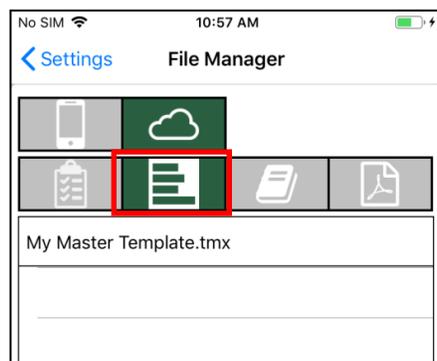
8. Next, tap 'File Manager' near the bottom of the screen.



9. On this screen, tap the cloud icon to access the files located in your cloud drive.

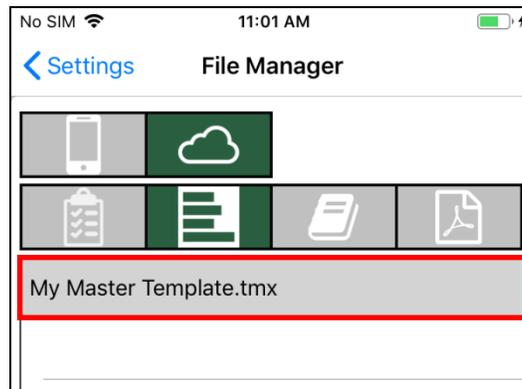


10. Next, tap the second icon underneath the phone and cloud icons. This is the 'Templates' icon.

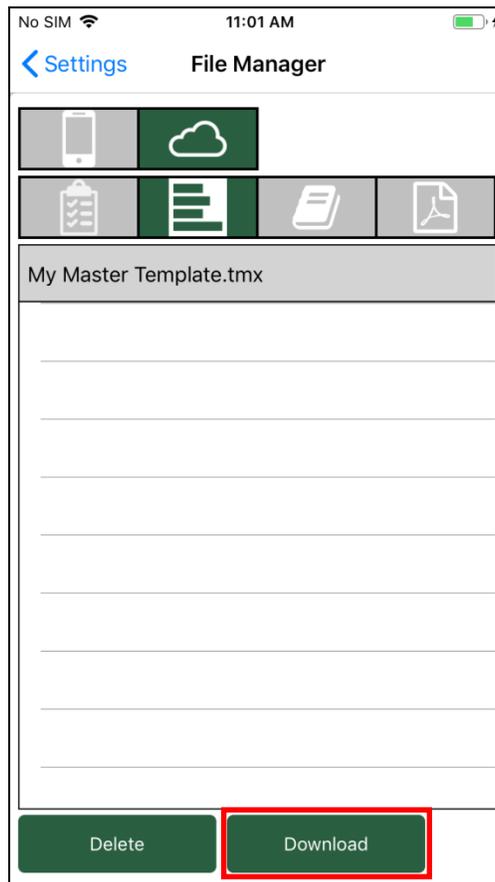


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11. Tap on the template file you want to download. This will be 'My Master Template.tmx' in this instance.



12. Finally, tap the 'Download' button in the lower right hand corner.



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13. A message will appear that says 'downloading' that will disappear after a few seconds. Once this message disappears, the template will be downloaded and you will have successfully uploaded your template from the PC to the app. The next time you start a new inspection on the app, you will see your new template as an option.