

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Move Palm-Tech to a New Computer

This step by step How To article explains how to install Palm-Tech on a new computer and move key files to it from other Palm-Tech installs.

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

HOW TO: Move Palm-Tech to a New Computer

Moving Palm-Tech to a new computer is a two-step process. The first step is to install Palm-Tech on the new PC. The second step is to move your key files to Palm-Tech on the new PC.

To install Palm-Tech on a new computer, you'll want to locate the email we sent you when you purchased and follow the installation instructions in that email. If you can't locate the email and you need it resent, you will need to fill out a license request form. Below are the steps for having your license email resent.

1. To update your license information, you first need to fill out a license request form. You can locate it online here: https://www.palm-tech.com/support/license_request.php
2. Once you fill out all of the information on the webpage click 'Send' to submit the request to Palm-Tech.
3. We will process the request once business day after we receive it. You will receive an email from us with the updated license and instructions for getting it in place.

After Palm-Tech is installed you'll want to move all of your key information (libraries, templates and settings) from one PC to another. The best way to do this is to create a backup on the old PC that has the information you want to transfer, then restore that backup on the new PC you are setting up.

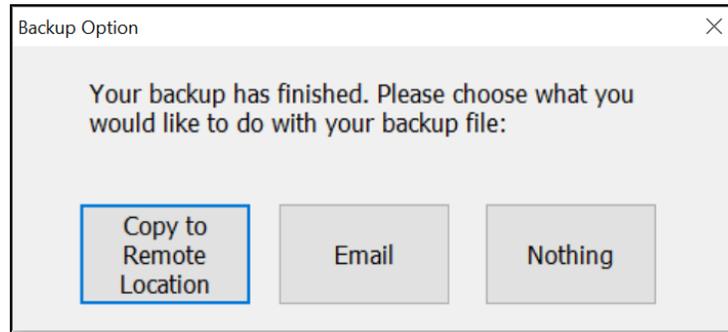
Creating a Backup – This is done on the original PC, NOT the new PC you are setting up

1. With the program already open, the first step is to click on Setup-> Backup Program Data to Disk.

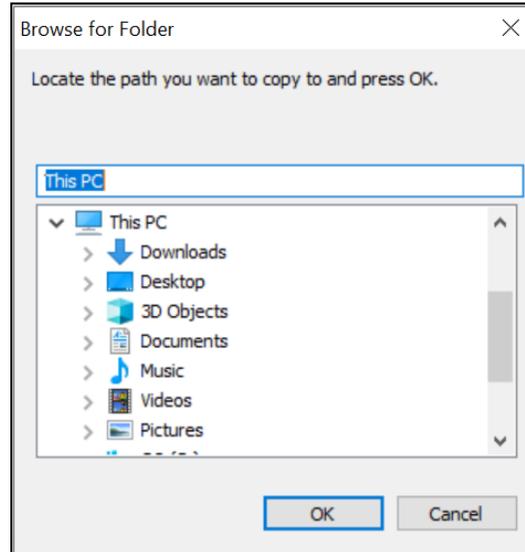


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2. Next, you will be prompted with the following 'Your backup has finished. Please choose what you would like to do with your backup file.' You have three options to choose from: Copy to Remote Location, Email and Nothing. You will want to choose the option that will be the most convenient for you to move the newly created backup file to the PC that you would like to restore it on. Detailed explanations of each option are below.



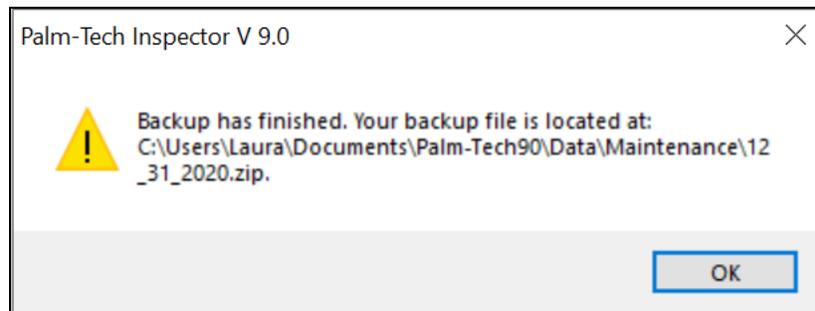
Copy to Remote Location – If you choose this option you will be prompted with a screen that allows you to navigate to a folder of your choosing to save the created backup file. This option works great if you have a USB drive plugged in, have a network location you want to save it too or if you know exactly where you want it go.



Email – If you choose this option and you use an email program that is installed locally on your device then the program will automatically open your email, start a new email and attach the backup file to it so you can easily send it off. If you use a web-based email (gmail, yahoo, etc) then the program will not be able to open your email program automatically.

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Nothing – If you choose this option then the program will create your backup and automatically save it in C:\Documents\Palm-Tech90\Data\Maintenance. The backup file will be named the current day's date and will be a '.zip' file. A message will appear like the one below showing you the exact path of the file:

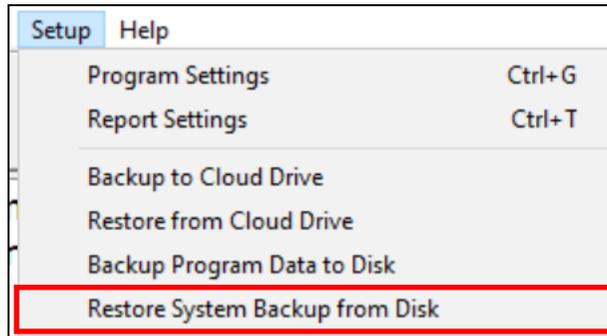


3. Now that the backup has been created and moved to the new PC that we want to restore it on, we are ready to restore it.

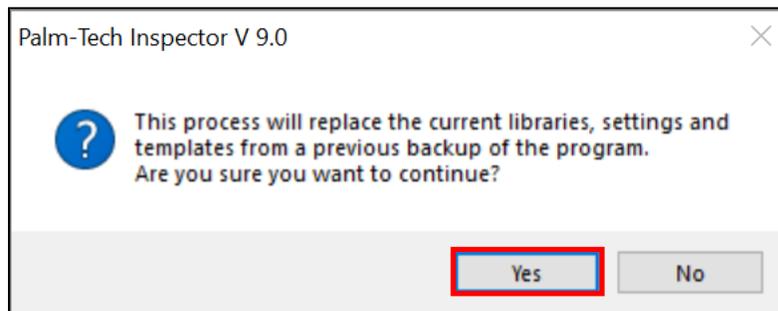
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Restoring the Backup – This is done on the new PC you are setting up

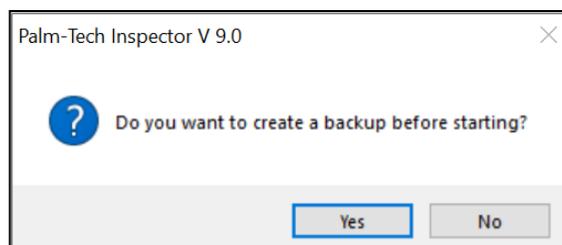
1. To restore the newly created backup you will first need to make sure that the backup file was moved successfully to the new PC. Once this is complete, the first step is to go to Setup->Restore System Backup from Disk.



2. Next a message appears asking if we are sure that we want to start the process of restoring the backup. Click 'Yes.'

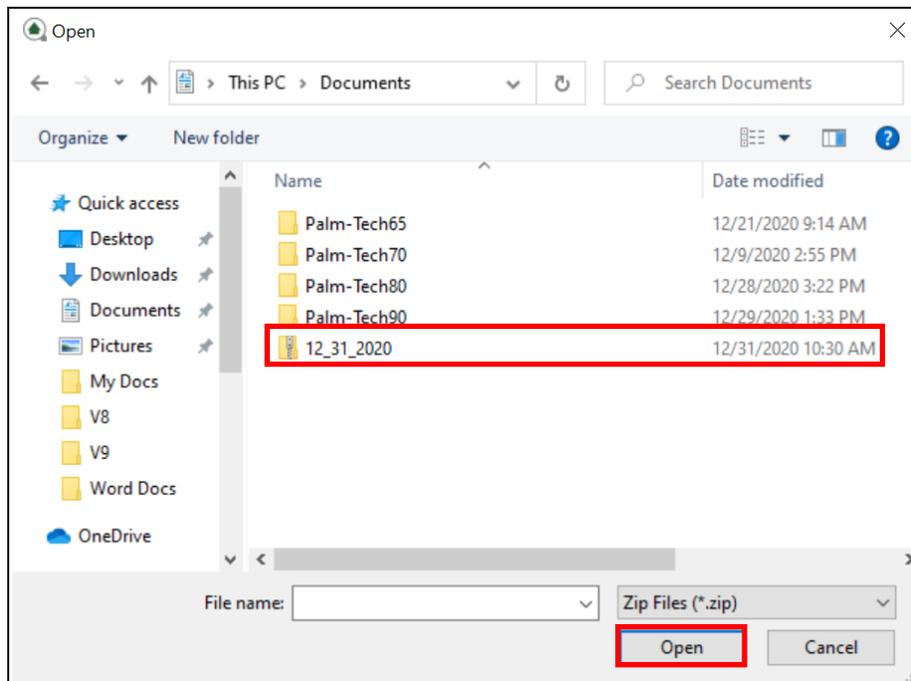


3. Next a message will appear asking if you want to create a backup of the information that is currently on the PC. If this is a PC that you have done some customizing on or worked with, and there is any chance that you would want to go back to the libraries, templates, settings that are there, click 'Yes.' If you this is a new PC and you haven't done any work with Palm-Tech yet then you can simply click on 'No.'

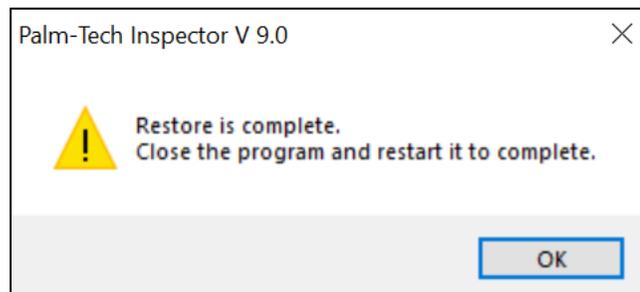


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- Now a screen will appear that will allow us to navigate to the location of the backup file we created and then moved to the PC. Once you navigate to where the file is located, click on it and then click on 'Open.'



- A message will now appear stating 'Restore is complete. Close the program and restart it to complete.' This means that the restore has been successful.



- Completely close out of everything related to Palm-Tech and when you reopen it, all of the files from the backup will be available for use.