

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

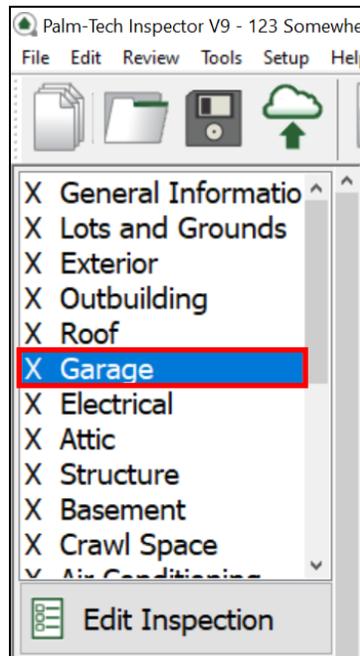
Rename a Category on a PC

This step by step How To article explains how to rename a category on a PC

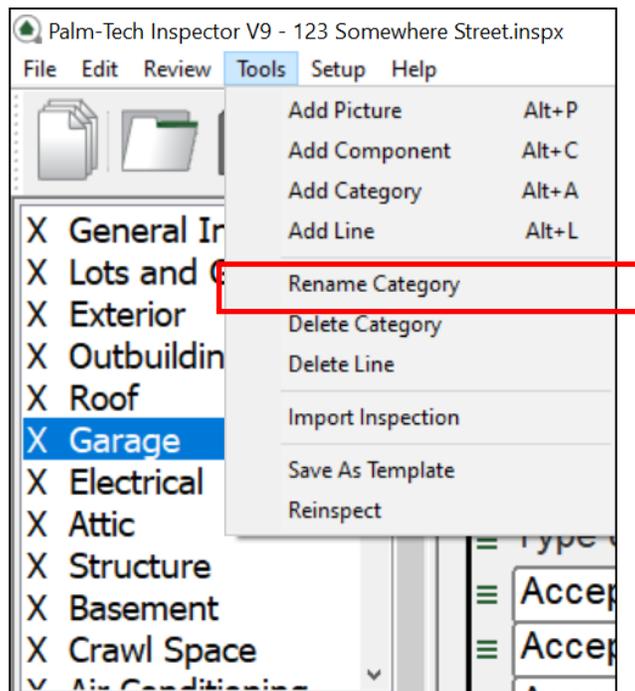
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HOW TO: Rename a Category on a PC

1. The first step is to click on the category you want to rename in the list on the left-hand side of the screen.

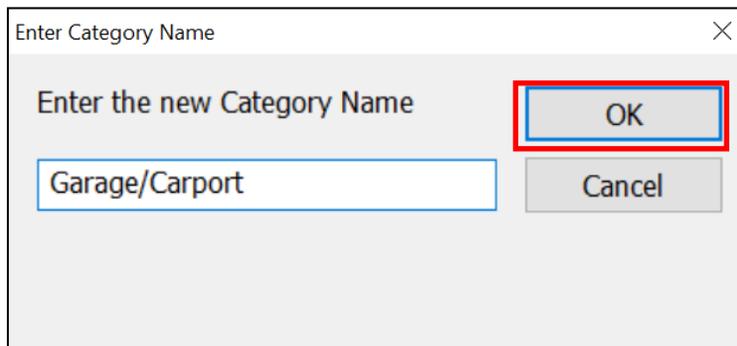
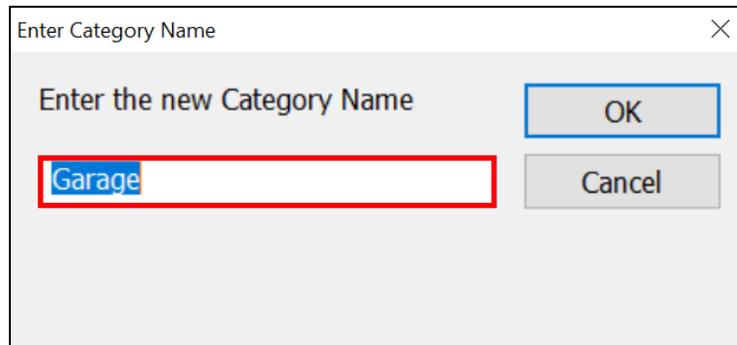


2. Once your category has been selected, click 'Tools' at the top and click 'Rename Category.'

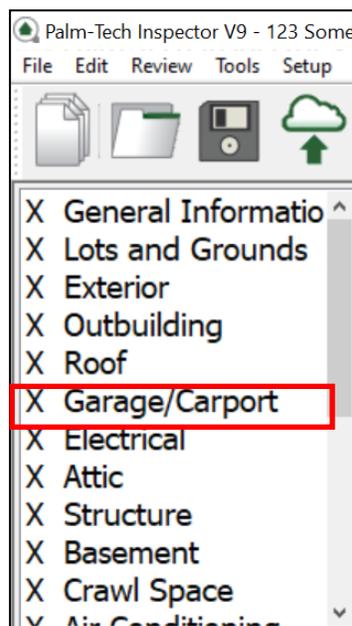


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3. The 'Enter Category Name' box will pop up. This is where you can enter the new name of your category. Once you've entered the new name, click 'OK.'



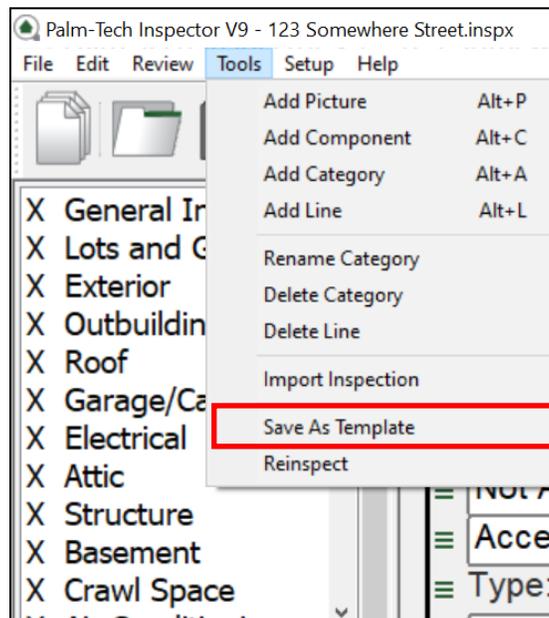
4. Your category has been renamed. Now, we need to save these changes.



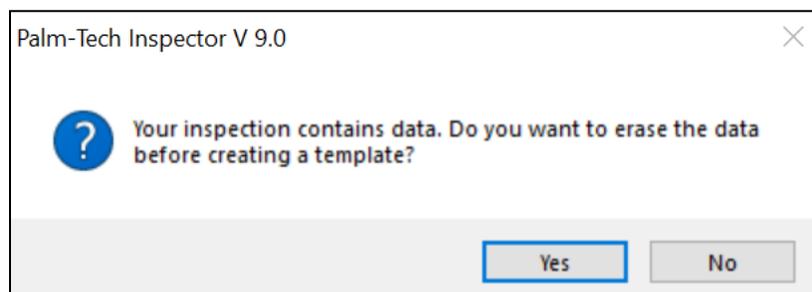
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To save changes you make to categories and/or lines in Palm-Tech permanently, you will need to save the inspection as a template. It is recommended that you make all the changes you'd like to these areas before saving them as a template to save time and effort.

5. To save the new name of your category, click 'Tools' again at the top. This time, we need to click 'Save As Template.'

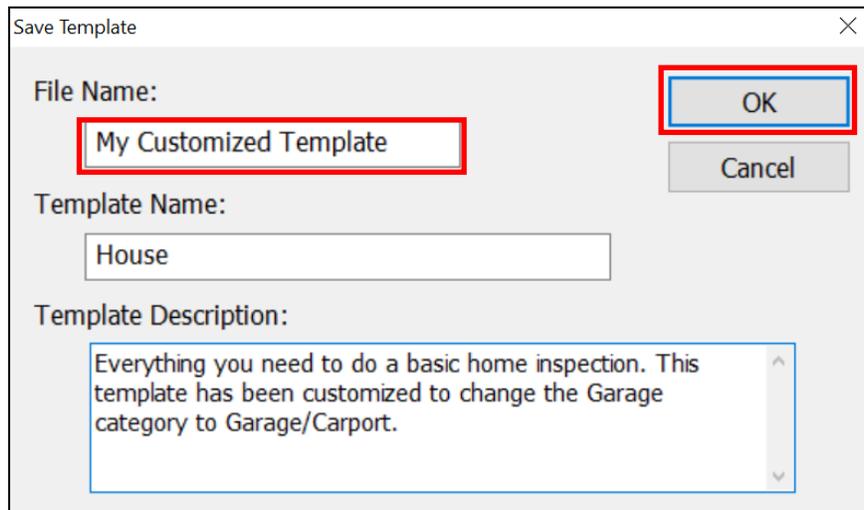


6. Palm-Tech will now ask you if you'd like to delete the data from your inspection before creating a template. This data refers to any ratings, descriptions or notes you've assigned to lines; for example, if you marked 'Driveway' as 'Acceptable,' then keeping this data will mean any inspection you start with this new template will have Driveway already marked Acceptable. If you want to clear the data out, click 'Yes.' If not, click 'No.'



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7. A box will pop up prompting you to save your template's file name. This can be anything you'd like, such as 'Basic House Template' or 'My Master Template.' For this example, we're going to save it as 'My Customized Template.' Once you've entered your file name, click 'OK.'



8. Your template has now been saved. Palm-Tech will now ask if you'd like to send the template to your Cloud Drive. If you want to be able to access this template on your other devices, click 'Yes.'

