

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Save an Inspection as a Template

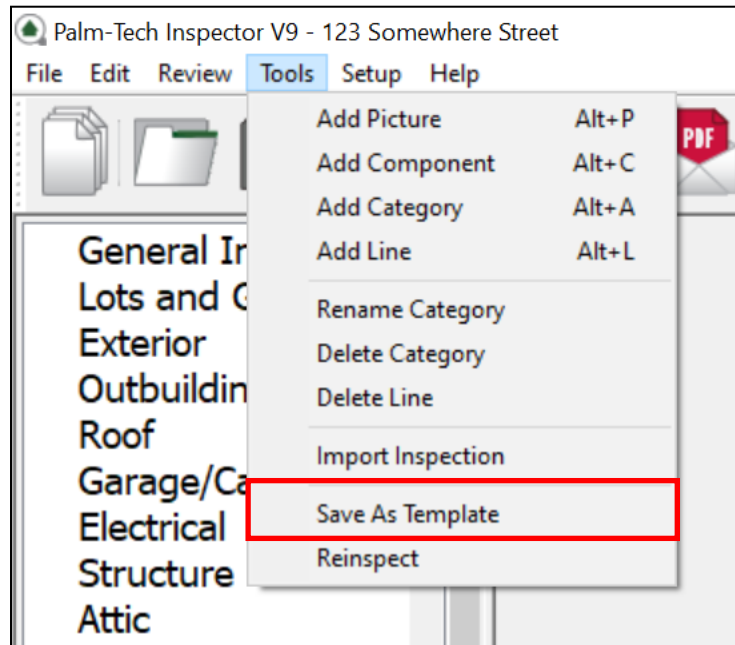
This step by step How To article explains how to save an inspection as a new template

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

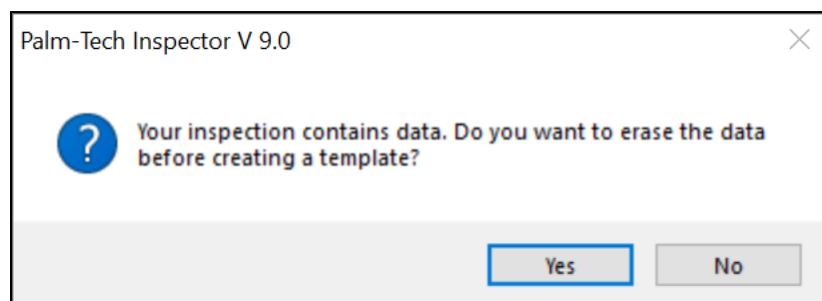
HOW TO: Save an Inspection as a Template

You can make changes to inspections such as adding/deleting/renaming lines and categories. These changes can be made for an individual inspection, but you can also make the changes and save them as a template so that each time you start a new inspection, the changes are there.

1. Once you have made all of the desired changes, the first step is to click on Tools -> Save as Template.

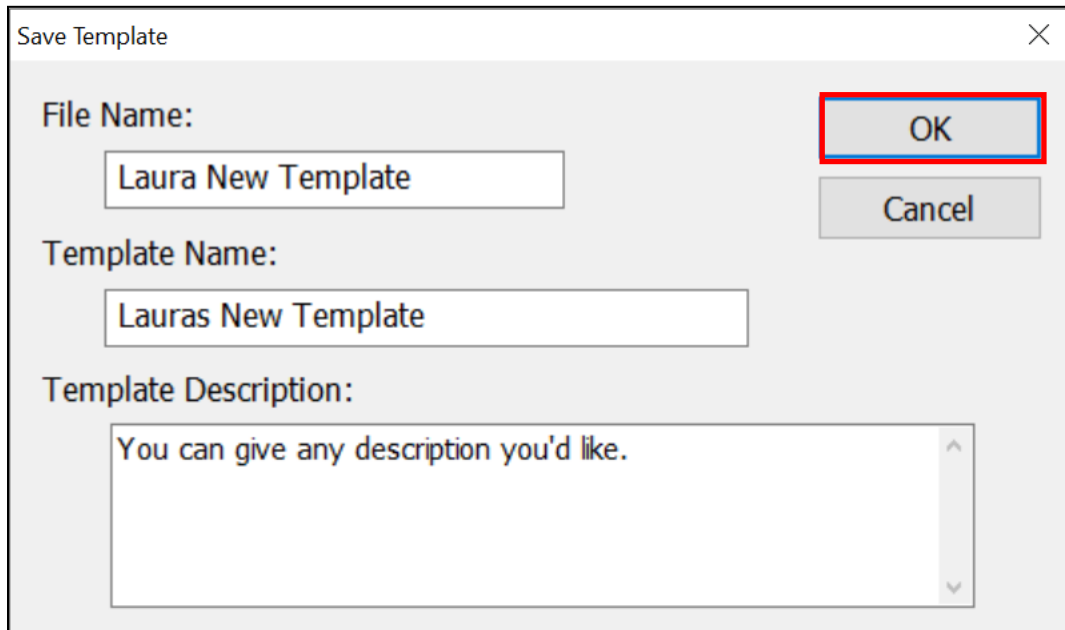


2. This will bring up a screen that says the inspection contains data and asks if you want to erase this data before creating a template. If you have entered data such as info in the General information, ratings, descriptions, or notes that you want to keep as part of your template, click 'No.' If you want to clear out all of the data, click 'Yes.'

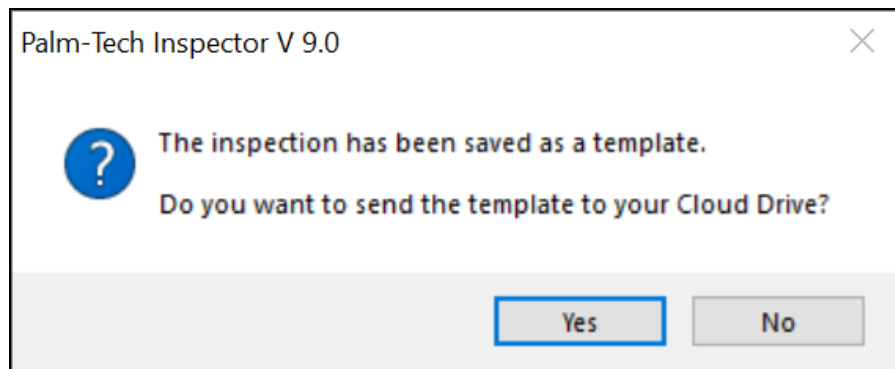


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3. Next the 'Save Template' window appears. Here you give your template a 'File Name,' 'Template Name,' and a 'Template Description.' Once you have finished entering this information, click 'OK.'



4. Finally, there will be a window that states the template has been saved and asks if you want to send the template to your cloud drive. If you do, click 'Yes.'



5. You have now created a new template.