

PALM▲**TECH**

home inspection software

V E R S I O N 9

HOW TO:

Use Custom Fields in Report Settings

This step by step How To article explains how to use custom fields in Report Settings.

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

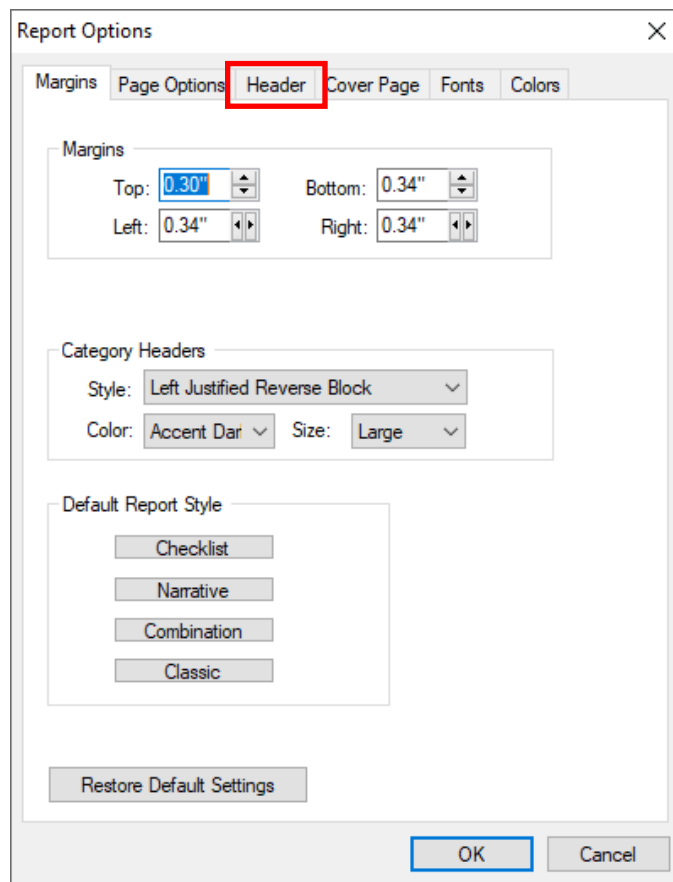
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You can customize the header of your reports in Palm-Tech the way you want. You can set up a custom page header or use the preset fields. One of the preset fields is Custom Fields which allows you to have information show up at the top of each page of your inspection report. This is commonly used with items such as the client name, property address, inspection company email or phone number.

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

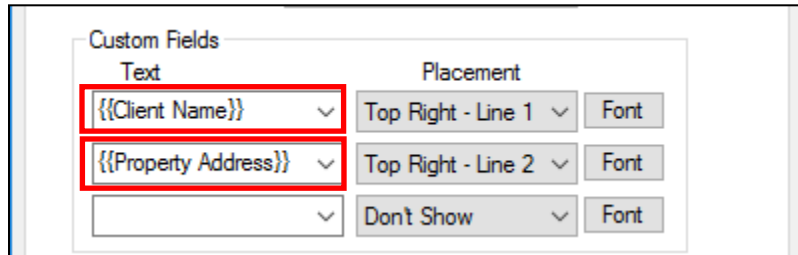


2. This will bring up the Report Options window. Click on the 'Header' tab.



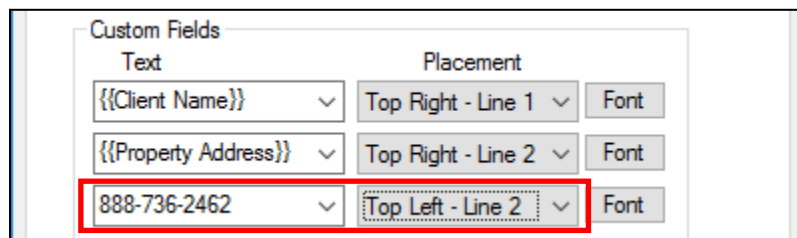
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3. On this screen, there is an option for 'Custom Fields'. You can have up to 3 custom fields and by default the program uses two: Client Name and Property Address. You can remove these by simply clearing them out. For this document we will be leaving these in place, and adding a third one for our company phone number.



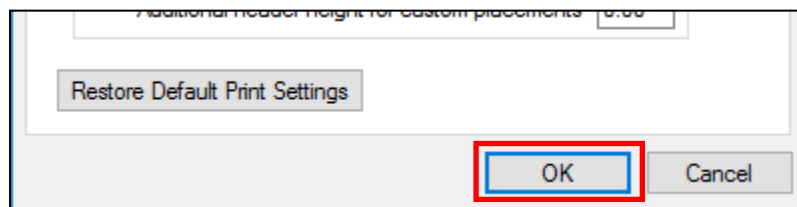
Text	Placement	Font
{{Client Name}}	Top Right - Line 1	Font
{{Property Address}}	Top Right - Line 2	Font
	Don't Show	Font

4. To do this, we'll click in the third custom field box and type in (888)736-2462. Then, we'll change the placement to 'Top Left - Line 2'. You can also click on the Font button to change the font as desired.



Text	Placement	Font
{{Client Name}}	Top Right - Line 1	Font
{{Property Address}}	Top Right - Line 2	Font
888-736-2462	Top Left - Line 2	Font

5. When you have finished setting up the custom fields as you want click 'OK' in the bottom right corner.



Restore Default Print Settings

OK Cancel

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6. You have now modified the custom fields. If you go to 'Print Preview' you will see the change has taken affect in the header.

