

**PALM**  **TECH**

home inspection software

V E R S I O N 9

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# HOW TO:

## Add a New Service in the Portal

**This step by step How To article explains how to add a new service in the Palm-Tech Portal**

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

# HOW TO: Add a New Service in the Portal

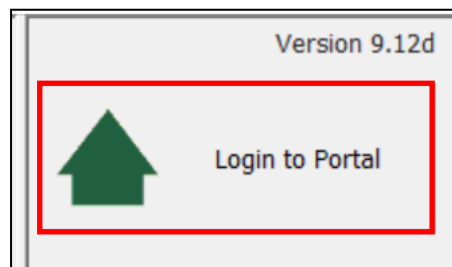
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With the Palm-Tech Portal, you can easily organize different services you offer your clients. Once you have added services into the Portal, you can then choose from these services when you schedule an appointment with a client. When you want to add a new service to the Portal, follow the steps below.

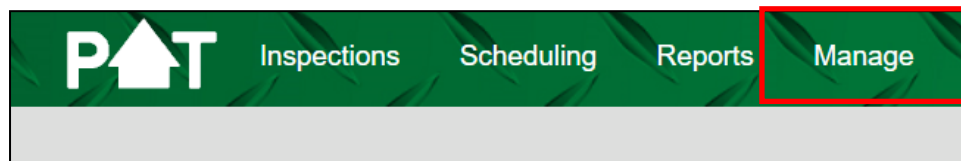
1. The first step is to login to the Portal. You can do this two ways; the first way is to follow this link:

<https://www.portal.palm-tech.com/account/login.php>

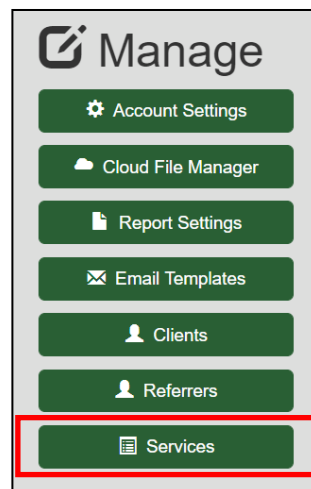
You can also access the Portal by opening the Palm-Tech software and clicking 'Login to Portal' on the right-hand side of the screen.



2. Once the Portal is open, click the 'Manage' tab at the top of the screen.



3. On this screen, click the 'Services' option at the bottom.



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4. Here, you can see a list of the services you provide your clients. To add a new service, click 'Add Service' at the top-left.

Services

**Add Service**

Show  entries Search:

Name	Amount	Minutes	Actions
Home Inspection	400	150	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Wind Mit, 4 Pt, Standard	500	120	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Showing 1 to 2 of 2 entries

5. On this screen, you can name your new service, assign a price to it and input the amount of time it takes for the service to be performed. The 'Order' checkbox at the bottom indicates where you want this new service to appear in your list of available services.

**Add Service**

**Service:**

**Amount:**

**Minutes:**

**Order:**

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6. Once you have entered your information, click 'Add Service.'

### Add Service

**Service:**

**Amount:**

**Minutes:**

**Order:**

7. Your new service has now been added to the portal and can be attached to inspection appointments.

### Services

Show  entries

Name	Amount	
Home Inspection	400	150
Wind Mit, 4 Pt, Standard	500	120
Mold Inspection	300	120

Showing 1 to 3 of 3 entries