

**PALM**▲**TECH**

home inspection software

V E R S I O N 9

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# HOW TO:

## Add Your Company Information

**This step by step How To article explains how to add your company information 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 Your Company Information

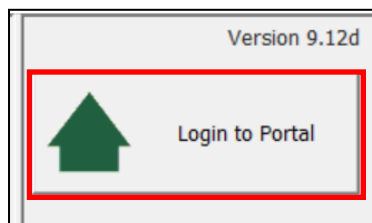
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The Palm-Tech Portal allows you to easily access and edit your company information. This includes your company's address, email, website and other information that you may want available to your clients. To edit this information, follow the steps below.

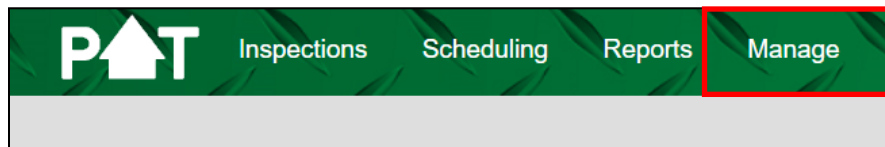
1. The first step is to login to the Portal. You can do this two ways; the first way is to follow this link:

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

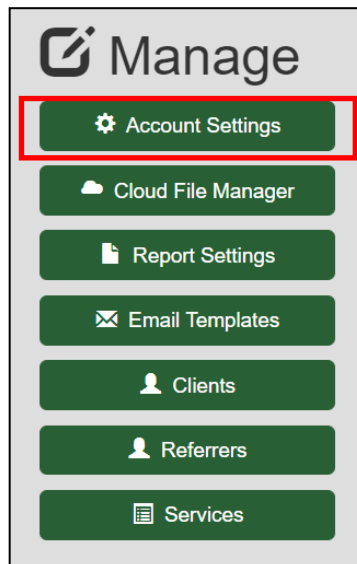
You can also access the Portal by opening the Palm-Tech software and clicking 'Login to Portal' on the right-hand side of the screen.



2. Once the Portal is open, click the "Manage" tab at the top.



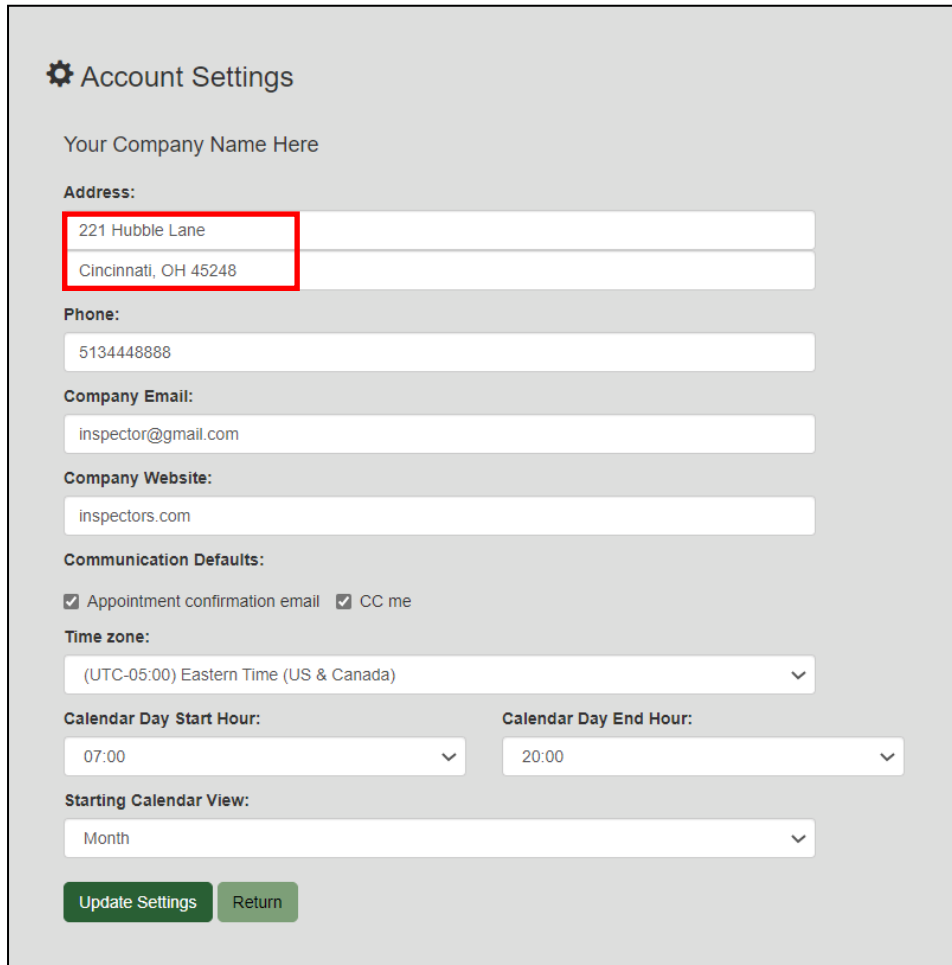
3. On this screen, click the "Account Settings" option at the top.



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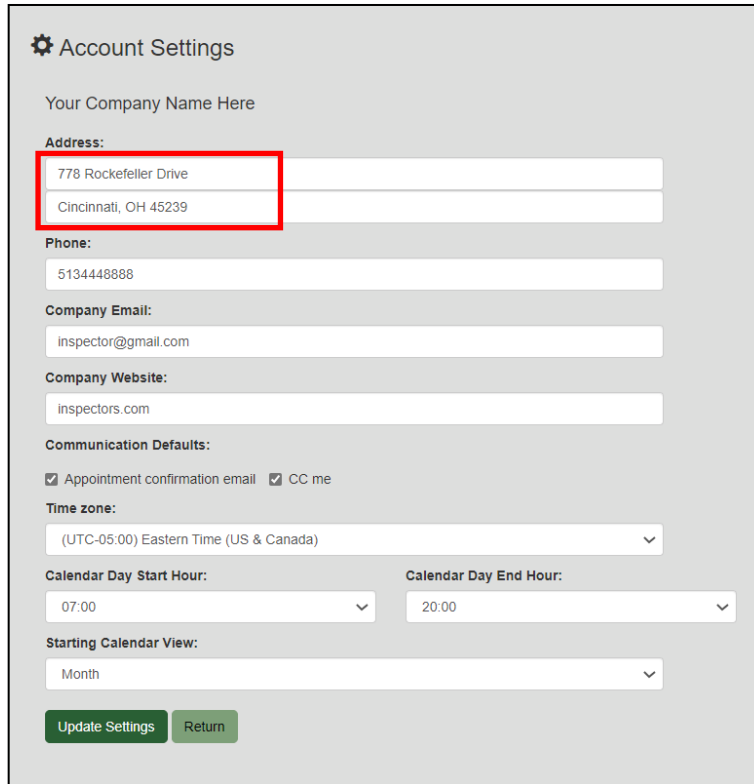
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4. The 'Account Settings' screen will show you all the information available to add for your company. In this example, we are going to change the company address from '221 Hubble Lane' to '778 Rockefeller Drive.'



The screenshot shows the 'Account Settings' page with a gear icon and the title 'Account Settings'. Below the title is a placeholder 'Your Company Name Here'. The 'Address' section has two input fields: the first contains '221 Hubble Lane' and the second contains 'Cincinnati, OH 45248'. A red box highlights the first field. Other sections include 'Phone' (5134448888), 'Company Email' (inspector@gmail.com), 'Company Website' (inspectors.com), 'Communication Defaults' (checked for 'Appointment confirmation email' and 'CC me'), 'Time zone' (dropdown set to '(UTC-05:00) Eastern Time (US & Canada)'), 'Calendar Day Start Hour' (dropdown set to '07:00'), 'Calendar Day End Hour' (dropdown set to '20:00'), and 'Starting Calendar View' (dropdown set to 'Month'). At the bottom are 'Update Settings' and 'Return' buttons.

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**Account Settings**

Your Company Name Here

**Address:**

778 Rockefeller Drive  
Cincinnati, OH 45239

**Phone:**

5134448888

**Company Email:**

inspector@gmail.com

**Company Website:**

inspectors.com

**Communication Defaults:**

Appointment confirmation email  CC me

**Time zone:**

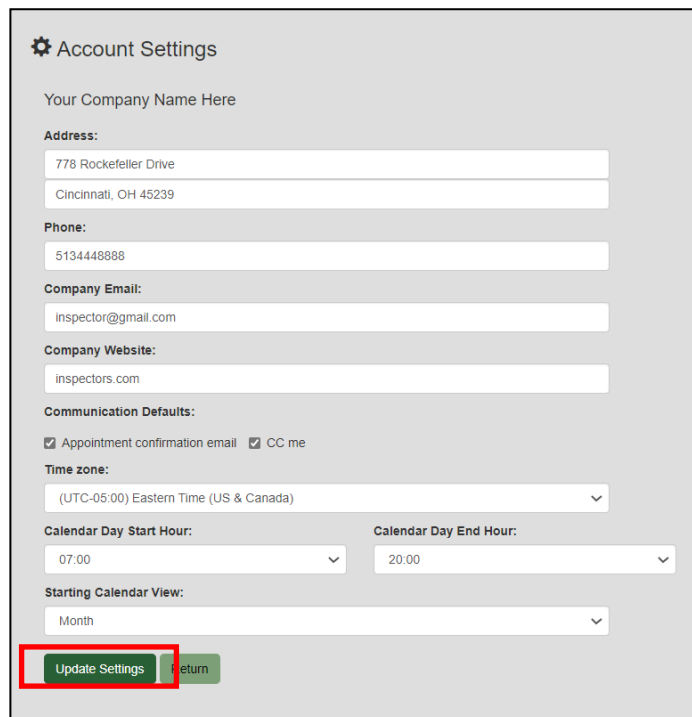
(UTC-05:00) Eastern Time (US & Canada)

**Calendar Day Start Hour:** 07:00 **Calendar Day End Hour:** 20:00

**Starting Calendar View:** Month

**Update Settings** **Return**

5. Once your changes are complete, click 'Update Settings' at the bottom.



**Account Settings**

Your Company Name Here

**Address:**

778 Rockefeller Drive  
Cincinnati, OH 45239

**Phone:**

5134448888

**Company Email:**

inspector@gmail.com

**Company Website:**

inspectors.com

**Communication Defaults:**

Appointment confirmation email  CC me

**Time zone:**

(UTC-05:00) Eastern Time (US & Canada)

**Calendar Day Start Hour:** 07:00 **Calendar Day End Hour:** 20:00

**Starting Calendar View:** Month

**Update Settings** **Return**

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6. Your company information will now be updated in the Palm-Tech software and app.

The screenshot shows a software interface with a toolbar at the top containing icons for REPORT, PDF, a grid, a checkmark, a document, PROGRAM, and REPORT, along with a help icon. Below the toolbar is a form with two main sections:

- General Information**
  - Property Address: 23 Bell Avenue
  - City: Cincinnati State: Ohio Zip: 45247
  - Client Name: Marcus Cline ... Edit
  - Referrer Name: Michelle Stevens ... Edit
- Inspection Company Information** (highlighted with a red border)
  - Address: 778 Rockefeller Drive
  - City: Cincinnati, State: OH Zip: 45239