

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Copy and Paste Categories Between Templates

This step by step How To article explains how to copy and paste categories between templates.

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

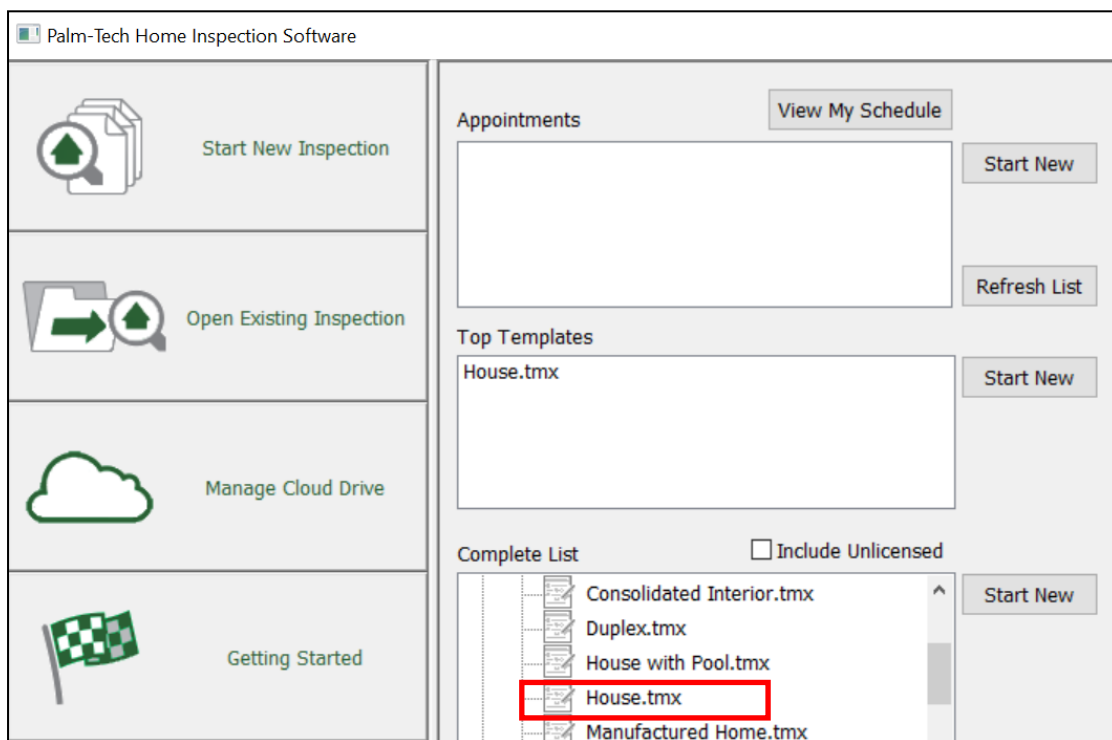
HOW TO: Copy and Paste Categories Between Templates

There may come a time when you want to add a category to a template/inspection from another template/inspection. You can do this by copying the category from the original source and pasting it to the template/inspection you're working on.

NOTE: To copy and paste categories in Palm-Tech, you must have only one inspection open at a time.

For this How To, we will be using the example of copying an 'Inspection Agreement' category from the 'House' template and pasting it into the 'Condo' template.

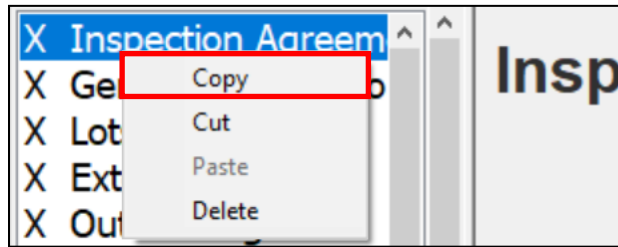
1. The first step is to start a new inspection with the template you want to copy the category from. For our example, this will be the 'House' template.



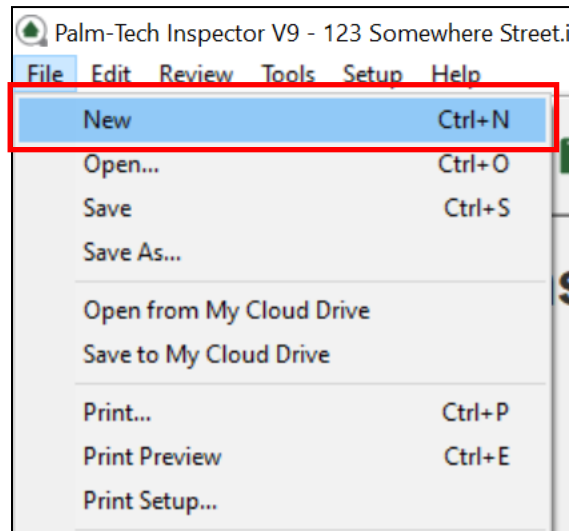
2. When the program prompts you to give the inspection file a name, you can skip past it by clicking 'Cancel.'

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- Next, right click on the category you want to copy and click 'Copy.'



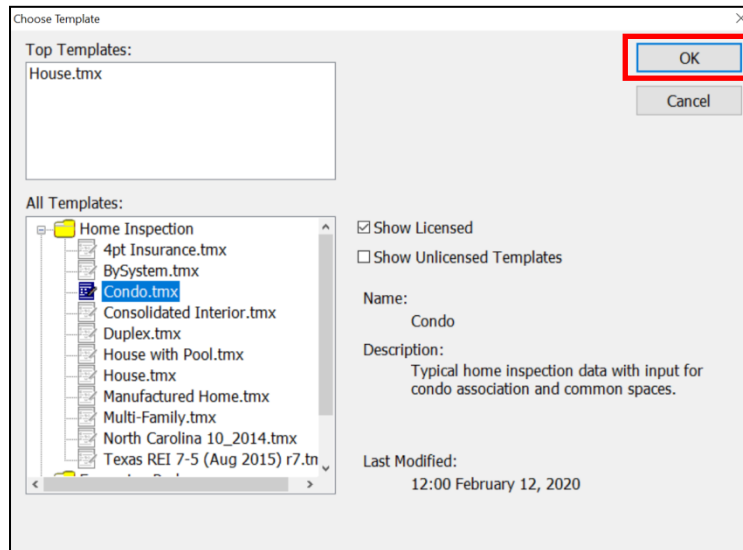
- Now that the category is copied, we need to open the template/inspection that we want to paste it into. In this example, we will use the 'Condo' template. To open this template, we'll go to File->New.



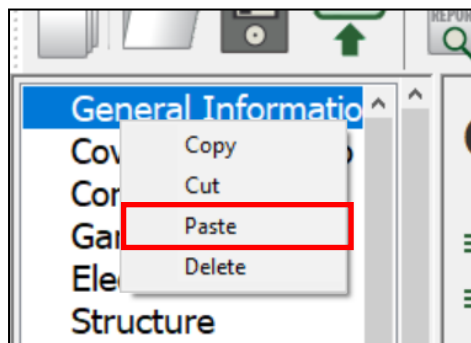
- Next, the program will ask if you want to save changes to the open inspection file. Click 'No.'

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6. Now we need to select the template we want to paste the category into and start a new inspection. For this example, we will choose the 'Condo' template. Click 'OK' to continue.

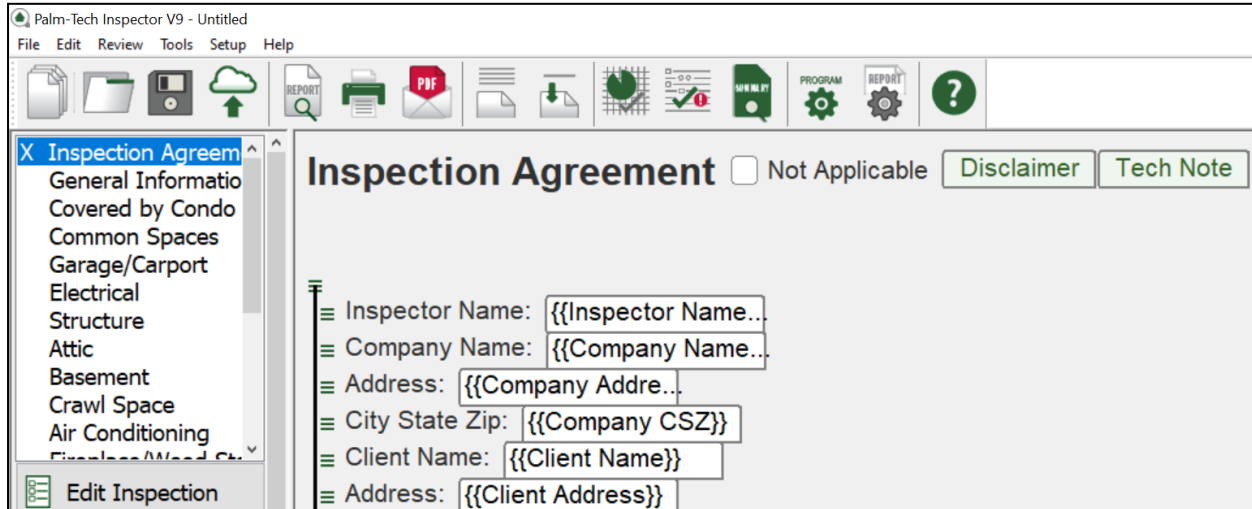


7. When the program prompts you to give the inspection file a name you can skip past it by clicking 'Cancel' (unless you want to give the file a name.)
8. Now, right click somewhere in the category list on the left and click 'Paste.'



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9. The category will now be added in. If you want to move the category somewhere else in your list, simply click on the category and drag it to where you want it.



10. If you want to make the 'Inspection Agreement' category a permanent part of your Condo template, you can do this by going to Tools->Save as Template. From here you will walk through a few screens where you can give the modified template a new name.