

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Edit or Update a Client's Information

This step by step How To article explains how to edit or update a client's information in the Palm-Tech Portal

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

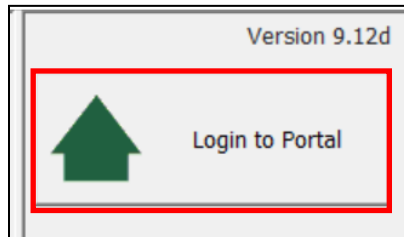
HOW TO: Edit or Update a Client's Information

The Palm-Tech Portal allows you to easily access your client information. When you need to edit or update this information, follow the steps below.

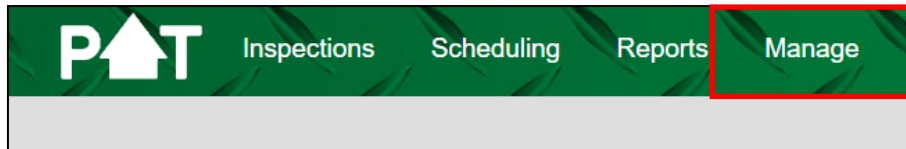
1. The first step is to login to the Portal. You can do this two ways; the first way is to follow this link:

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

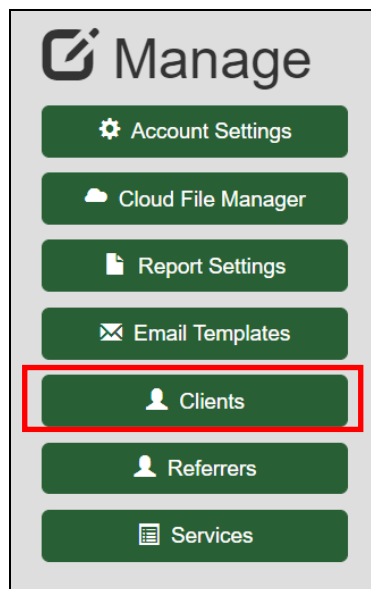
You can also access the Portal by opening the Palm-Tech software and clicking 'Login to Portal' on the right-hand side of the screen.



2. Once the portal is open, click the 'Manage' tab at the top.

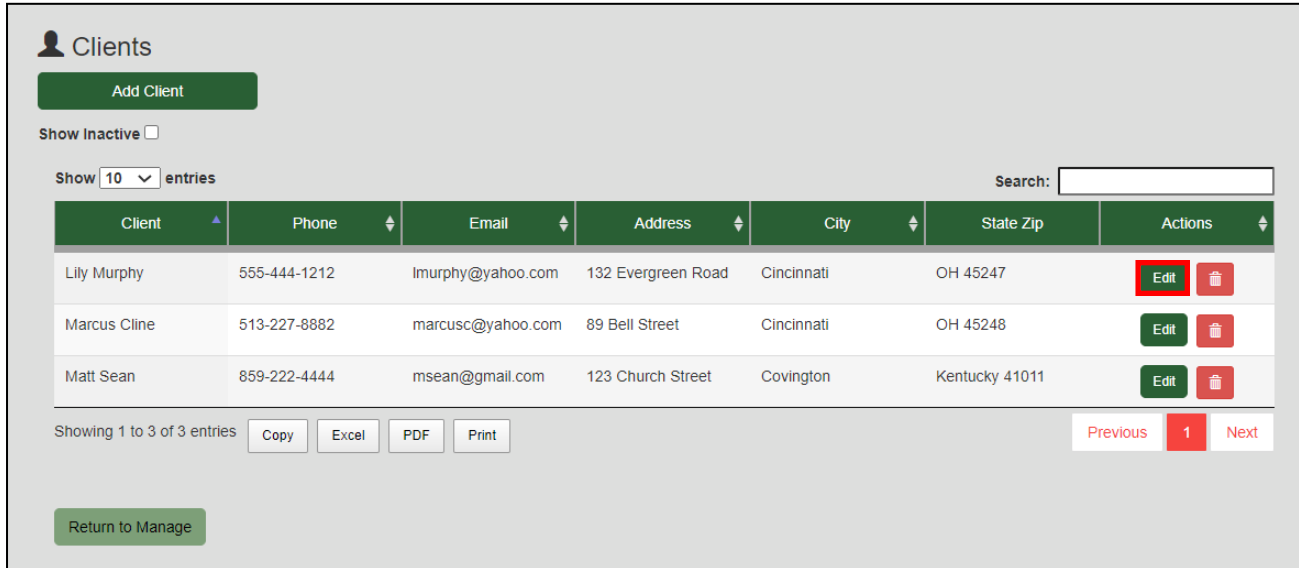


3. On the 'Manage' screen, click 'Clients.'



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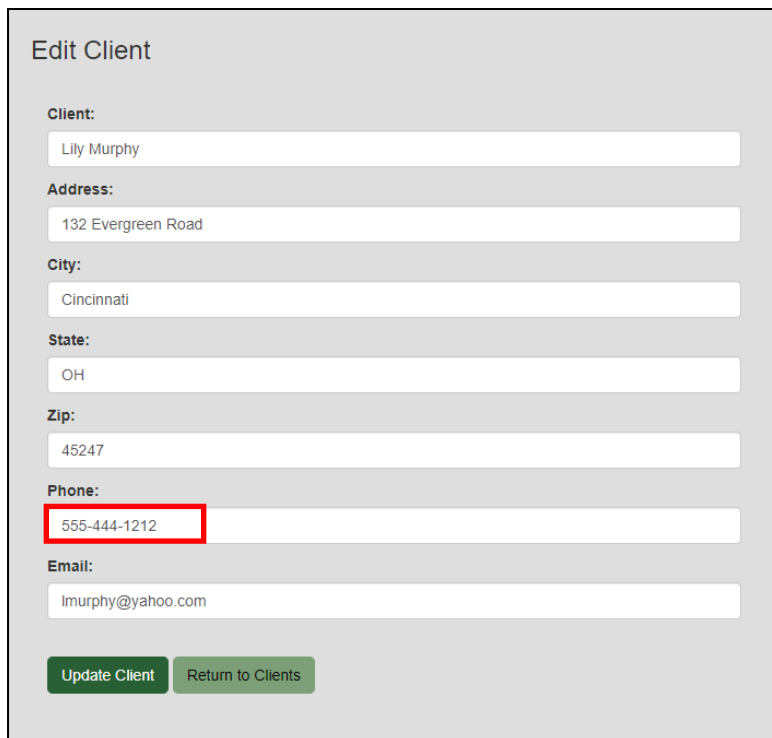
4. On this screen, you will see a list of the clients you've added into the portal. To edit the information of one of your clients, click the 'Edit' button underneath the Actions section on the right-hand side.



The screenshot shows the 'Clients' management interface. At the top left, there is a profile icon and the text 'Clients'. Below this is a green 'Add Client' button. A 'Show Inactive' checkbox is present and unchecked. A 'Show' dropdown menu is set to '10' entries. A search bar is located on the right. The main content is a table with columns: Client, Phone, Email, Address, City, State Zip, and Actions. The table contains three rows of client data. The 'Edit' button in the Actions column for the first row (Lily Murphy) is highlighted with a red box. Below the table, there are buttons for 'Copy', 'Excel', 'PDF', and 'Print'. A pagination bar shows 'Showing 1 to 3 of 3 entries' and 'Previous 1 Next'. At the bottom left, there is a green 'Return to Manage' button.

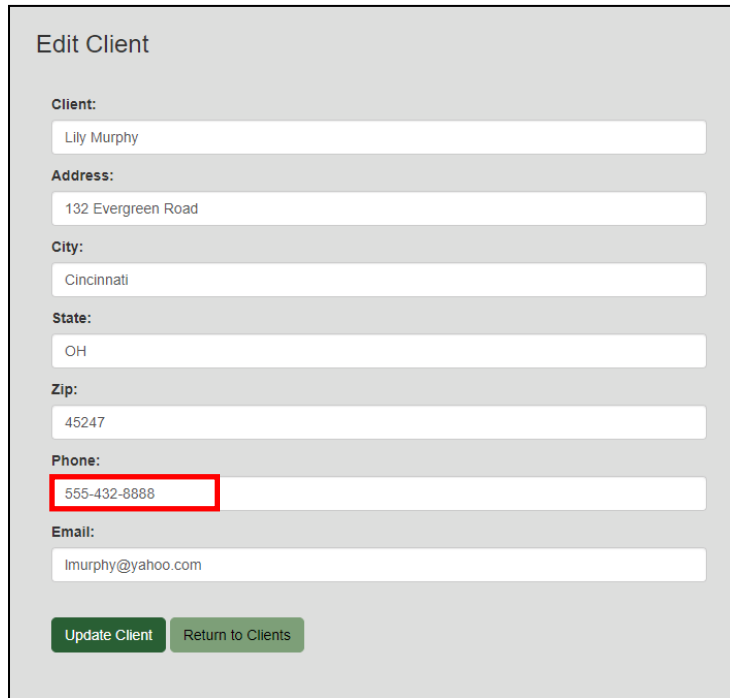
Client	Phone	Email	Address	City	State Zip	Actions
Lily Murphy	555-444-1212	lmurphy@yahoo.com	132 Evergreen Road	Cincinnati	OH 45247	Edit Delete
Marcus Cline	513-227-8882	marcuscl@yahoo.com	89 Bell Street	Cincinnati	OH 45248	Edit Delete
Matt Sean	859-222-4444	msean@gmail.com	123 Church Street	Covington	Kentucky 41011	Edit Delete

5. In the 'Edit Client' screen, you can change your client's name, address, phone number and/or email address. In this example, we're going to change this client's phone number.



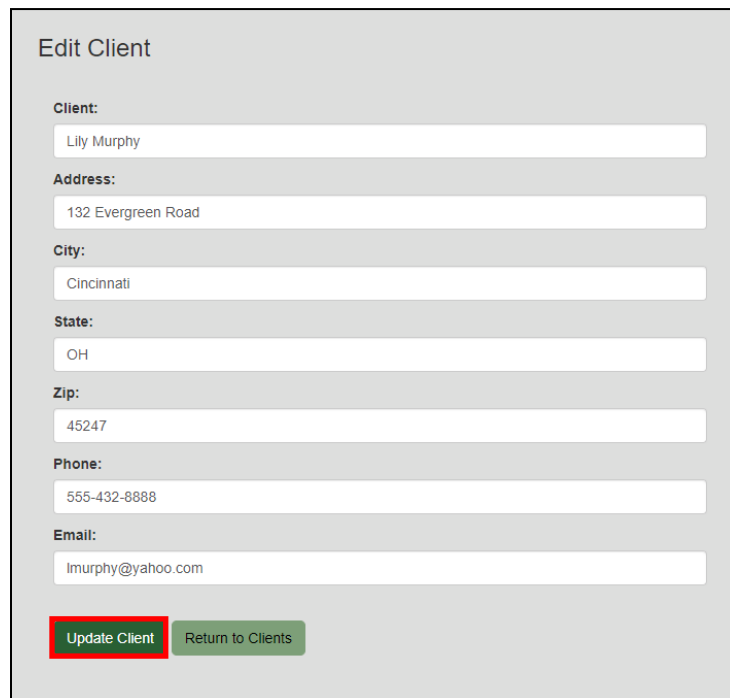
The screenshot shows the 'Edit Client' form. The fields are: Client (Lily Murphy), Address (132 Evergreen Road), City (Cincinnati), State (OH), Zip (45247), Phone (555-444-1212), and Email (lmurphy@yahoo.com). The phone number field is highlighted with a red box. At the bottom, there are two buttons: 'Update Client' and 'Return to Clients'.

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The screenshot shows a web form titled "Edit Client". It contains several input fields for client information: Client (Lily Murphy), Address (132 Evergreen Road), City (Cincinnati), State (OH), Zip (45247), Phone (555-432-8888), and Email (lmurphy@yahoo.com). At the bottom, there are two buttons: "Update Client" and "Return to Clients". The "Update Client" button is highlighted with a red border.

6. Once you've finished editing your client's information, click 'Update Client' at the bottom left of the screen.



This screenshot is identical to the one above, showing the "Edit Client" form. In this version, the "Update Client" button at the bottom left is highlighted with a red border, indicating the next step in the process.

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7. Your client information changes will now be reflected in the Palm-Tech portal, software and app.

Clients

[Add Client](#)

Show Inactive

Show **10** entries Search:

Client	Phone	Email	Address	City	State Zip	Actions
Lily Murphy	555-432-8888	lmurphy@yahoo.com	132 Evergreen Road	Cincinnati	OH 45247	Edit Delete
Marcus Cline	513-227-8882	marcuscl@yahoo.com	89 Bell Street	Cincinnati	OH 45248	Edit Delete
Matt Sean	859-222-4444	msean@gmail.com	123 Church Street	Covington	Kentucky 41011	Edit Delete

Showing 1 to 3 of 3 entries [Copy](#) [Excel](#) [PDF](#) [Print](#) [Previous](#) **1** [Next](#)

[Return to Manage](#)