

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Use the Portal Login

This step by step How To article explains how to use the Portal login to upload and download your files from the Portal.

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

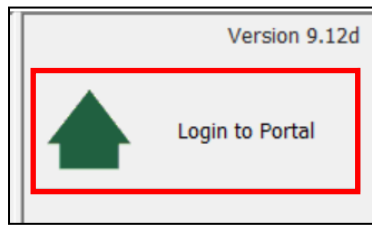
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If you are having an issue using the Cloud Drive from within the Palm-Tech Shell on your PC (something on your computer blocking Palm-Tech from being able to access the internet) you can use the Portal to upload and download your files on your PC. This document will first walk you through how to upload your files to your cloud drive, and then how to download them from the cloud drive.

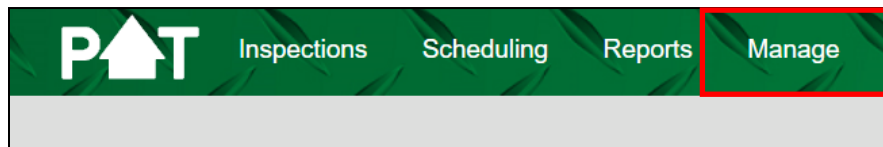
1. The first step is to login to the Portal. You can do this two ways; the first way is to follow this link:

<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. NOTE: If you are having trouble accessing the Cloud Drive from the shell then the 'Login to Portal' button in the shell may not take you to the website. If this is the case, use the link above.

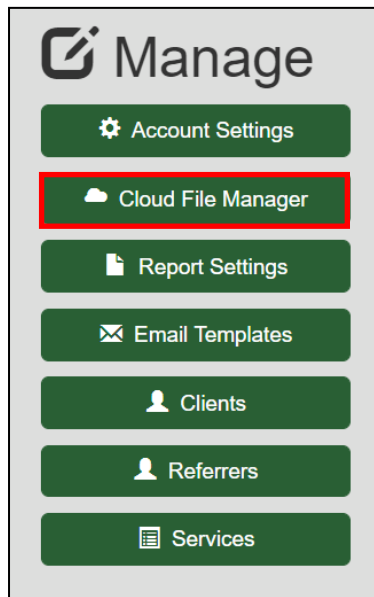


2. Once the Portal is open, click the 'Manage' tab at the top.

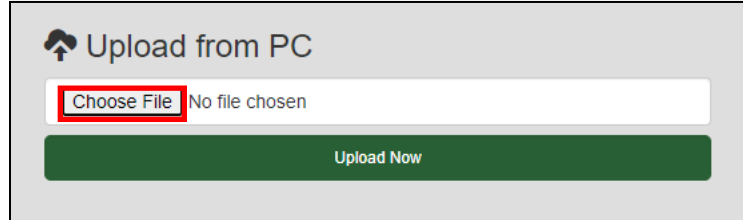


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3. On this screen, click 'Cloud File Manager.'



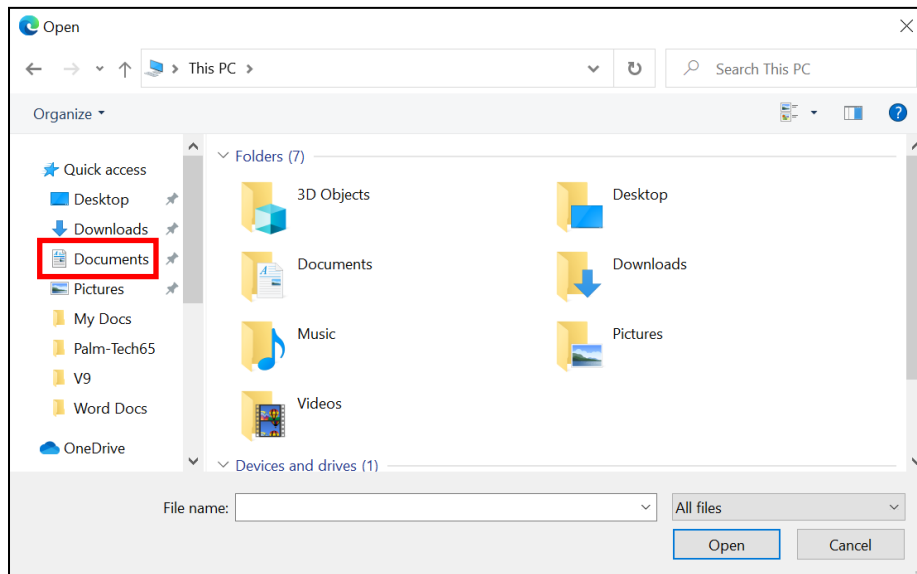
4. To upload files to your cloud you must click 'Choose File.' (You can only upload one file at a time.)



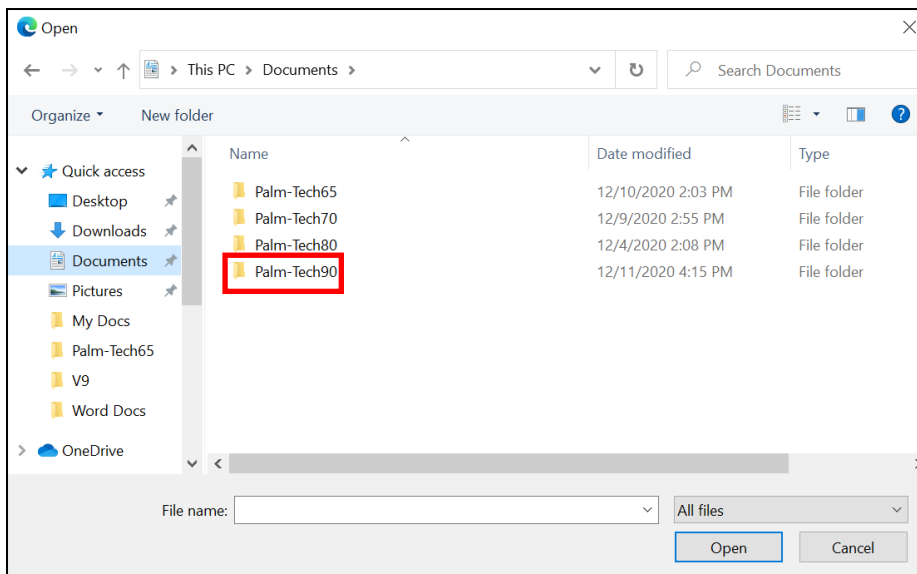
5. This will bring up a window that allows you to navigate to find the file you want to attach. This window will open up to the **last folder you attached a file from** so you will want to follow these steps to find the Palm-Tech folder.

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a) On the left-hand side double-click to open Documents.



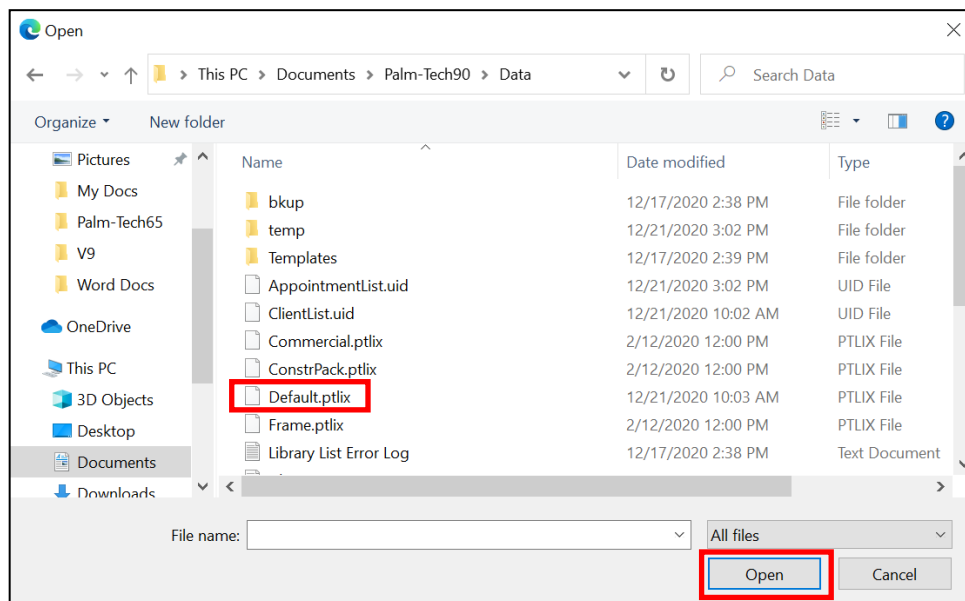
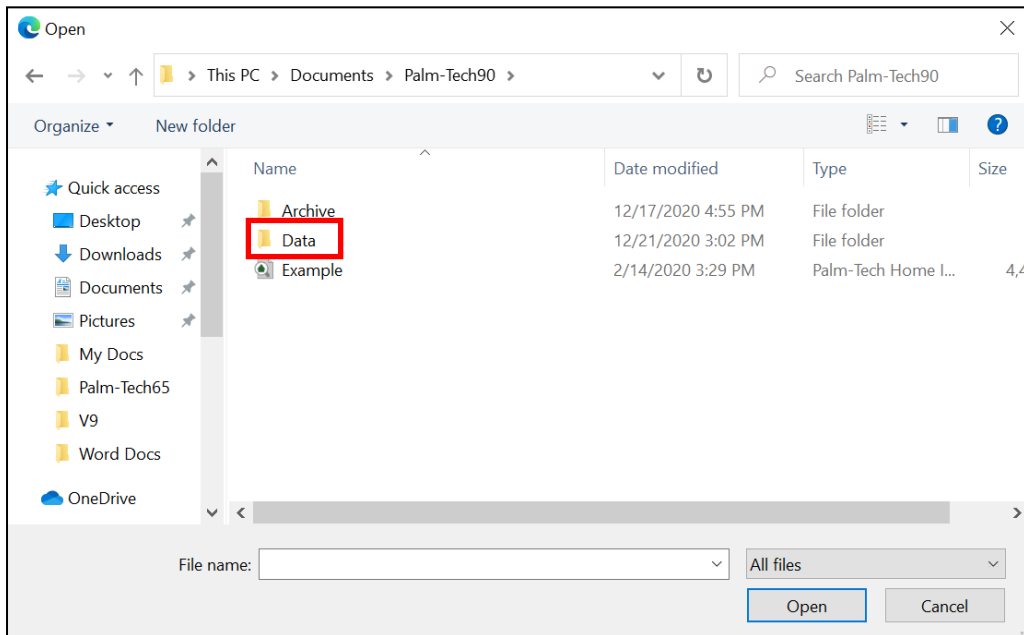
b) Double-click to open Palm-Tech90.



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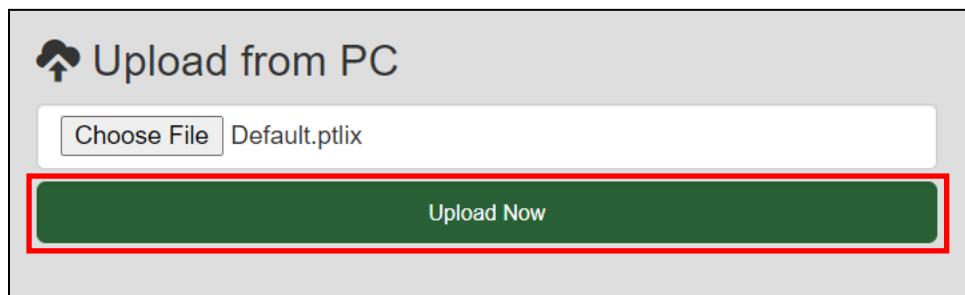
6. Locating and attaching the file.

- a) The **Library file** is located in the Data folder. Library files have the .ptlix extension and most inspectors use the 'Default.ptlix' library. To upload the library, double-click on the Data folder, then click on the .ptlix file you want to select it. Click 'Open.'



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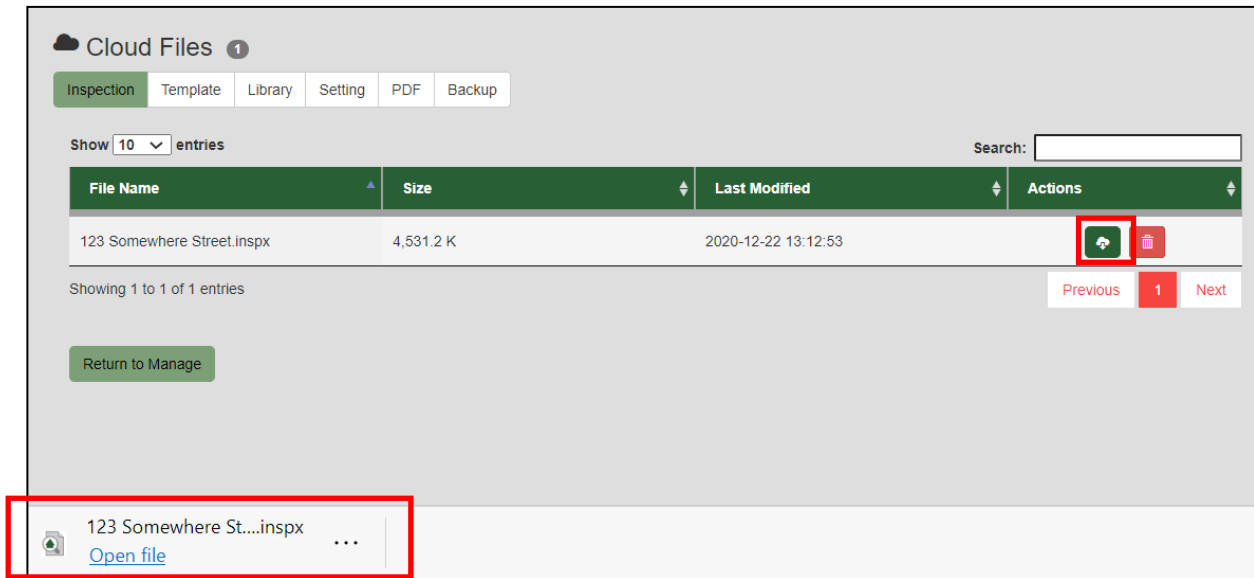
- b) **Templates** are located in the Templates folder inside the Data folder. To upload a template, double-click on the Templates folder to see your templates. After that, click once to highlight the template you want and click 'Open' to upload it.
 - c) **Inspection Files** are located in the Palm-Tech90 folder when you first open it. You will want to click once on the inspection file (not the PDF file) to highlight it, then click 'Open' to upload it.
 - d) The **Print Settings File** is located in the Data folder just like the Library file. It is called 'PrintSettings.uidx.' Click the file to select it, then click 'Open.' If you are creating and emailing PDFs from the app, you will want to make sure to upload this file so that the PDFs you create with the app match the ones created on your PC.
7. Once you have selected a file you want to upload, click 'Upload Now.' This will upload the file to your cloud drive.



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Downloading Files

1. To download a file, first select which files to show under 'Cloud Files': Inspections, Template, Library, Setting, PDF or Backup. Once you've found the file you want to download, click the icon with a cloud and down-arrow to download it. What happens next will vary based on your web browser, but in many cases you will see the downloaded file appear at the bottom the way it shows below.



2. Now that the file is downloaded we want to minimize our browser. You can do this by clicking the minimize button in the top right corner.

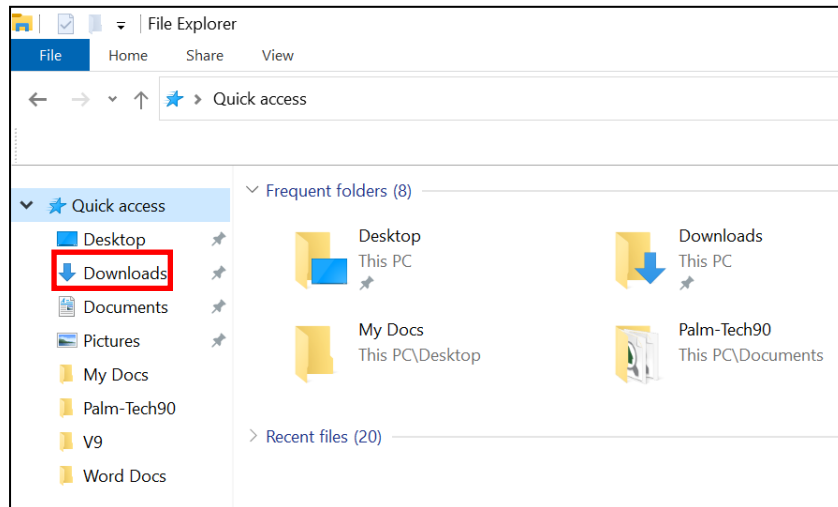


3. Next, open File Explorer. File Explorer is where you can locate different files on your PC. On most computers, this program is pinned to your bottom toolbar.



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- Now, navigate to your Downloads folder. This will most likely be toward the top of the left column as shown below.



- Here you will see the file(s) you downloaded. The final step is to copy the file(s) (one at a time if multiple) and paste them in their proper locations. You can copy a file by right-clicking directly on it and selecting 'Copy.' Once the file has been copied, navigate to the proper location for the file which is shown below.

Here is a breakdown of where each file type should go:

- Inspections (end in .inspx) – C:\Documents\Palm-Tech90
 - Libraries (end in .ptlix) – C:\Documents\Palm-Tech90\Data
 - Templates (end in .tmx) – C:\Documents\Palm-Tech90\Data\Templates
 - Print Settings (end in .uidx) – C:\Documents\Palm-Tech90\Data
- Once you navigate to the folder that the file should be placed in, simply right click in the folder and select 'Paste' and the file will be pasted into the folder. If you have multiple files, you will simply navigate back to the downloads folder and repeat the process for each additional file.