

PALM  **TECH**

home inspection software

V E R S I O N 9

HOW TO:

Work with Summaries

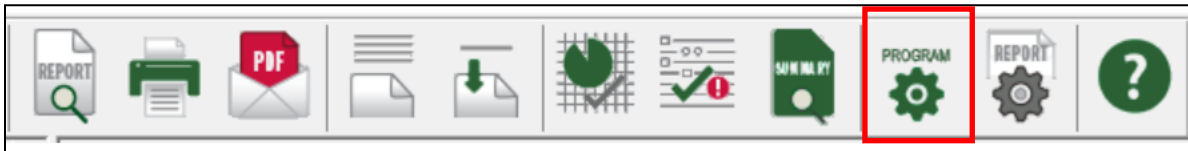
This step by step How To article explains how to edit the way summaries show up in your reports

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

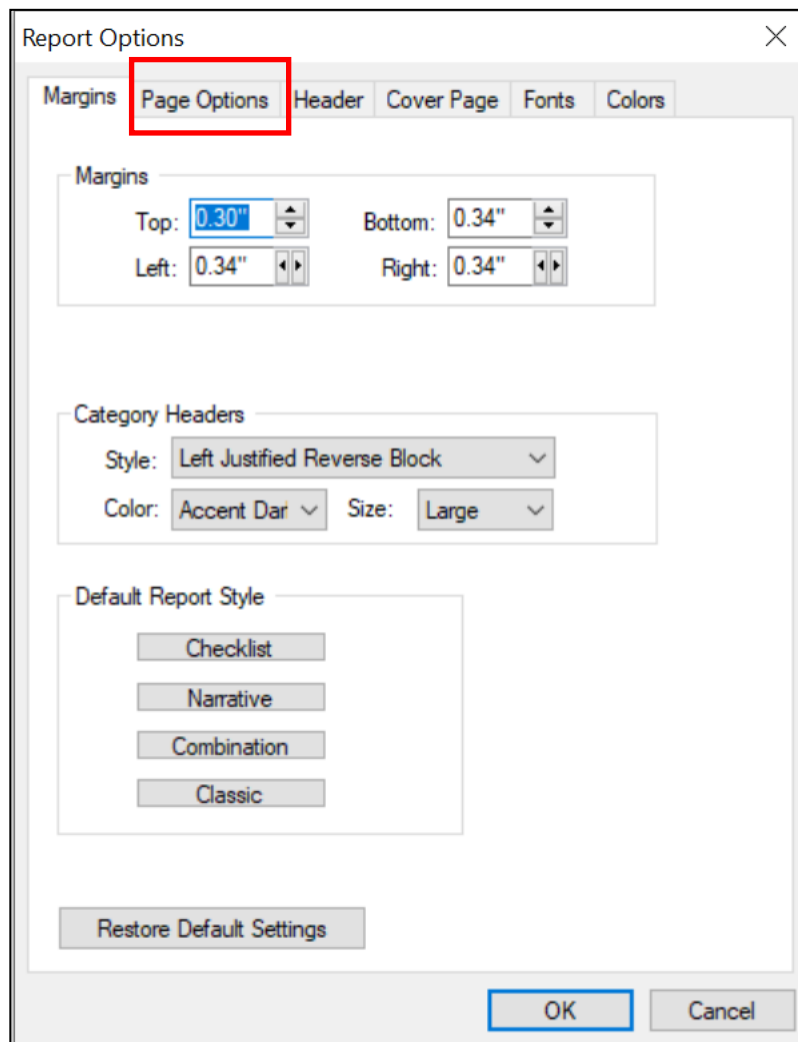
HOW TO: Work with Summaries

You can setup your inspection reports to automatically create summaries. These summaries are created based on the ratings you assign each line item. By default, the program will create a summary for every line item marked "Marginal" as well as a summary for every line item marked 'Defective'. This document walks through the various settings available to you in 'Report Settings' related to summaries.

1. The first step is to click on the Program Settings icon from the Toolbar.

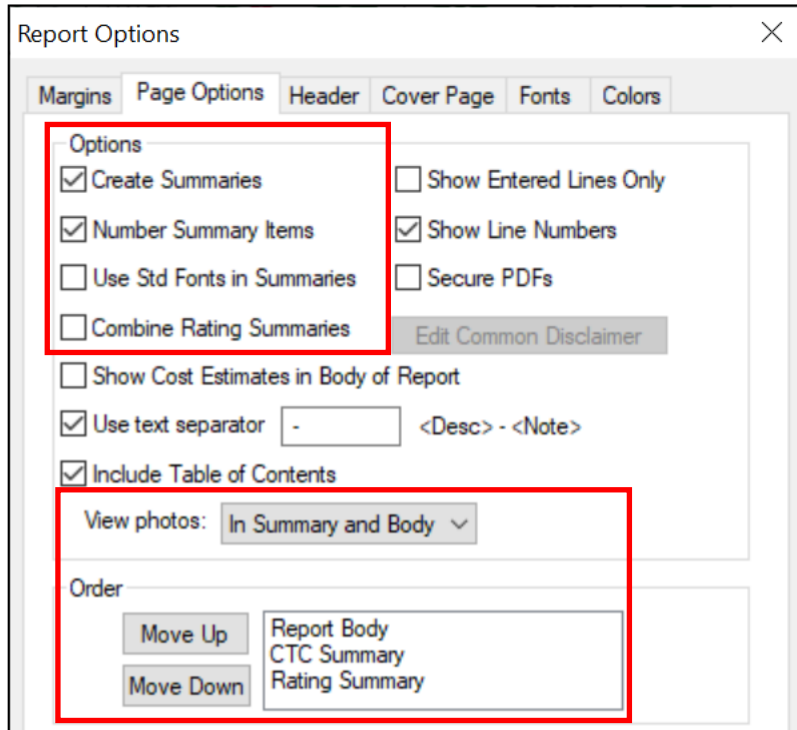


2. This will bring up the Report Options window. Click on the 'Page Options' tab.



HOW TO: Work with Summaries

3. In the 'Page Options' tab, we have several options related to summaries. Let's take a look at each one.



- Create Summaries – This option goes hand-in-hand with your rating settings. When 'Create Summaries' is checked, the program will create a summary for each rating that has the option 'Create Summary of items marked with this rating' checked in Edit Rating Sets. To edit your rating sets, see the final page of this guide.
- Number Summary Items – Check this option if you want the items in your summary to be numbered.
- Use Standard Fonts in Summaries – Check this option if you want the font, color, etc. formatting to be consistent for every item in your summaries. If the option is not checked, then the font, color, etc. will look the same way for each item as it does in the body of the report.
- Combine Rating Summaries – If you have multiple ratings set to create a summary (for example, Marginal and Defective are defaulted to create summaries), then by checking this option the program will create one combined summary for these ratings rather than separate summaries for each.
- View Photos – Here you have the option to have photos show up in the summary or have them not show up in the summary.

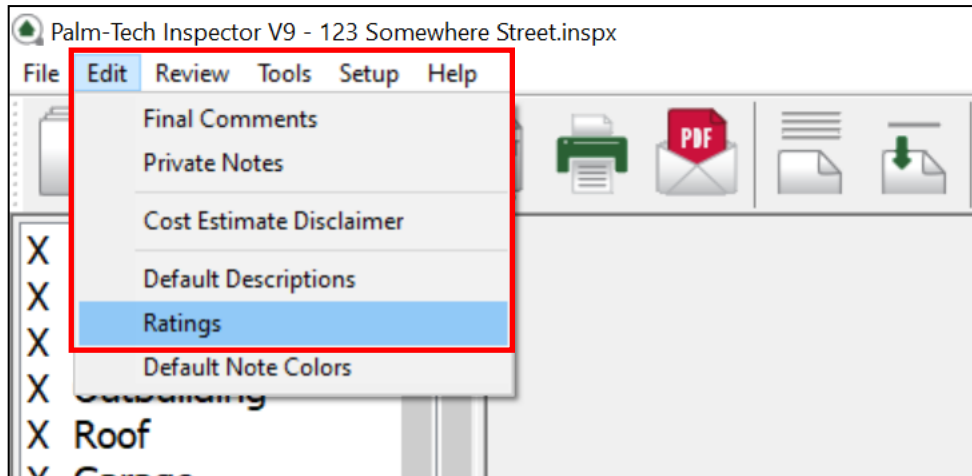
HOW TO: Work with Summaries

- f. Print Order – This allows you to change whether the summary shows up before the body of the report or after it.

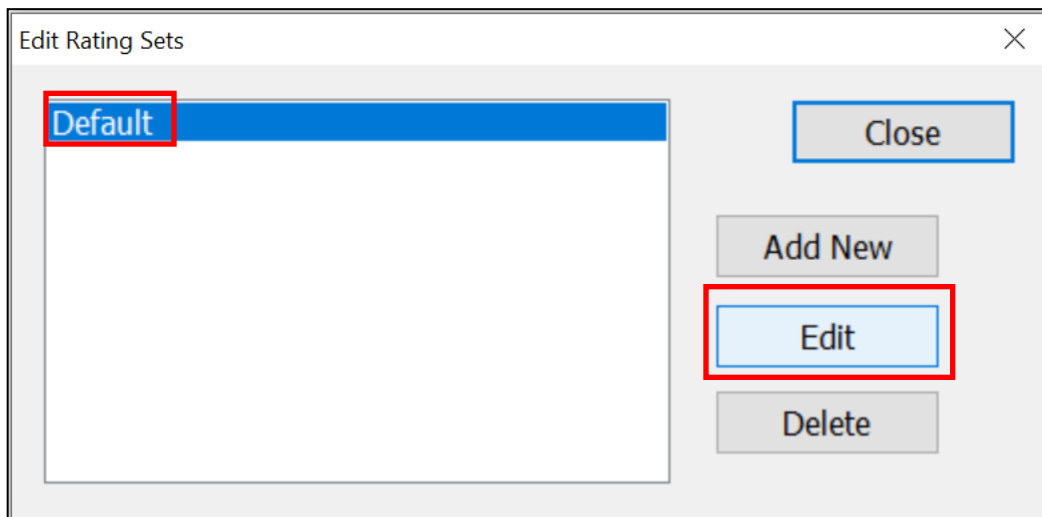
HOW TO: Work with Summaries

How to Have a Rating Create a Summary

1. To edit which of your ratings create summaries, first click 'Edit' in the top left, then 'Ratings' in the list below it.



2. Your rating set will pop up. Click the set you want to edit (in most cases, this will be 'Default'), then click 'Edit' on the right.



HOW TO: Work with Summaries

- You can now see each individual rating on the left, and whether it has the option checked to create a summary on the right. It is important to note that if the 'Create Summaries' option in Report Options is unchecked, no summaries will be created regardless of whether or not a rating is set to create a summary.

The screenshot shows the 'Edit Rating Set' dialog box. At the top, there are fields for 'Name' (Default) and 'Rating Set ID' (1). A 'Disclaimer' field contains the text: 'NOTE: All definitions listed below refer to the property or item listed as inspected on this report at the time of inspection'. A 'Close' button is in the top right corner.

Below the disclaimer, there are two main sections. On the left, there are 'Add Rating' and 'Delete Rating' buttons, and a list of ratings: 'Acceptable', 'Not Present', 'Not Inspected', 'Marginal', 'Defective', 'Not Applicable', and 'Picture'. The 'Acceptable' rating is selected.

On the right, there are fields for 'Name' (Acceptable), 'Abbreviation' (A), and 'Rating Color' (Green). The 'Explanation' field contains the text: 'Functional with no obvious signs of defect.' Below this are several checkboxes:

- Indicates item is not present (appears in report)
- Indicates item is not applicable and should not appear in report
- Indicates item was not inspected (appears in report)
- Use value for scoring
- Include as being inspected for "Required" edits
- Requires Note
- Create Summary of items marked with this rating

The 'Create Summary of items marked with this rating' checkbox is highlighted with a red box. At the bottom, there is a 'Summary Disclaimer' field.