



Palm-Tech

HOME INSPECTION SOFTWARE

Step by Step

How To

Add New Lines

This How To article explains how to add new lines into your inspections

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

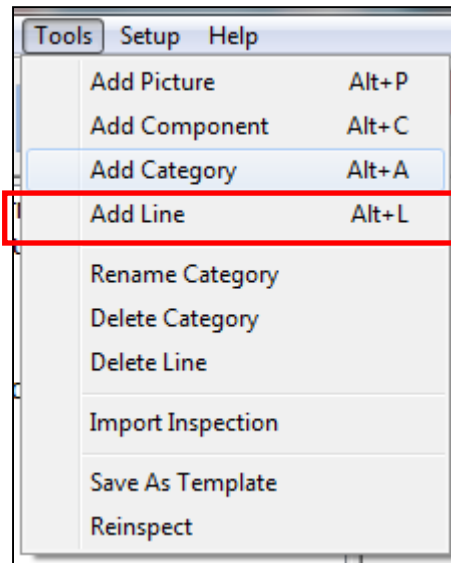
HOW TO: ADD NEW LINES

You can make changes to your inspections and templates. One of the changes you can make is adding in new lines.

There are two ways to add a new line into a report. This How To will cover both methods which are: (1) Copying an existing line, pasting it and renaming it (2) Go to Tools-> Add Line.

Tools->Add Line Method

1. The first step is to click on Tools->Add Line.



2. The 'Add Line' window will appear. Click on the 'Type:' dropdown to pick what type of line you want to add in. The different line types to choose from are below:

NOTE: The most commonly used line types are the '1 Question/Answer' and 'Rating, Prompt, Note'. Also, not all line types are compatible with the app.

- 1 Question/Answer
- 2 Question/Answer
- 3 Question/Answer
- Yes/No
- Standalone Note
- Checkboxes
- Option List
- Text
- Page Break
- Signature Line
- Rating, Prompt, Note

How To: ADD NEW LINES

- Once you select the type of line you want to add in, you'll be able to give specific properties to that line. For this example we are going to select a '1 Question/Answer' line.
- With this line type we need to give the new line a name in the 'Screen Prompt'. We also need to decide if we want a Rating and/or a Note to show up on the line by checking/unchecking the boxes in the lower left corner. The last thing to decide is where you want the line to show up in the line order. You decide this by selecting the line in the right column that you want the new line to show up after.

The screenshot shows the 'Add Line' dialog box with the following details:

- Type: 1 Question/Answer
- Screen Prompt: 1: New Line Item:
- Print Prompt (only if different from screen):
- Show Rating:
- Show Note:
- Insert at Top:
- Insert list: Lawn Sprinklers: (selected)
- Buttons: OK, Cancel

- Once you've entered the information as you want, simply click on 'OK' and the new line will be added in.

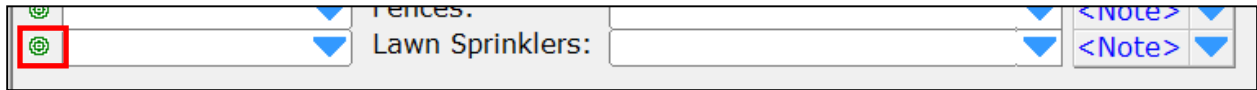
	Exterior Surface D	<Note>
	Fences:	<Note>
	Lawn Sprinklers:	<Note>
	New Line Item:	<Note>

How To: ADD NEW LINES

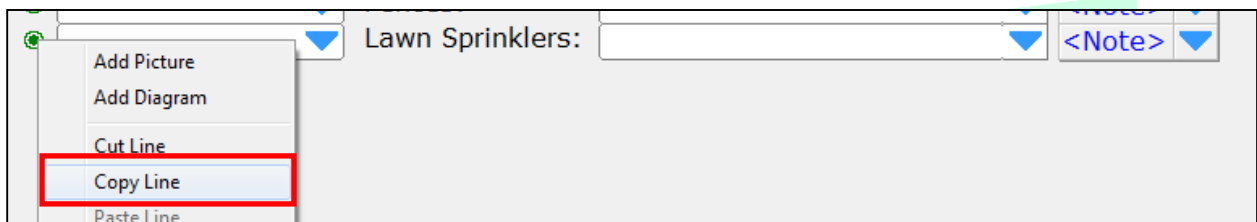
Copy/Paste/Rename Method

This method works great if you have a line already in your report that is setup the exact way you want the new line to be, but you simply want it to have a different name.

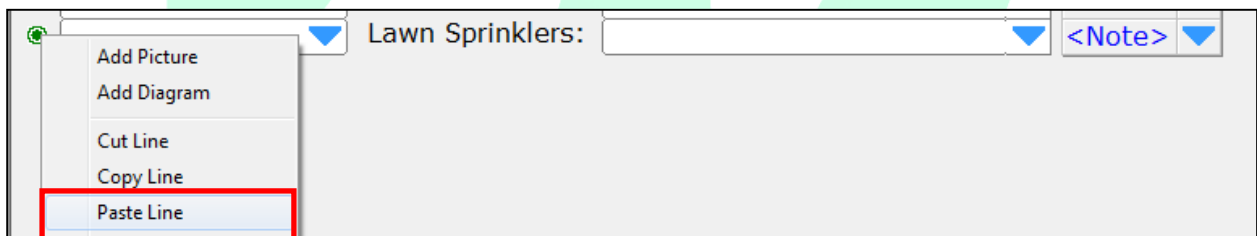
1. The first step is to right click on the circle to the left of the line you want to copy.



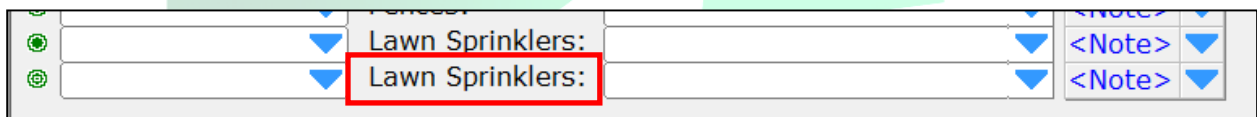
2. When you right click, several options will appear. Click on 'Copy Line'.



3. Next you want to right click where you want to add the line in your report and then select 'Paste Line'.

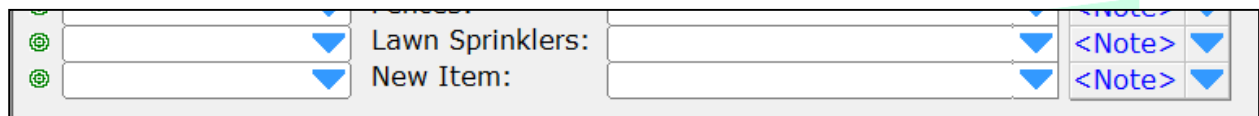
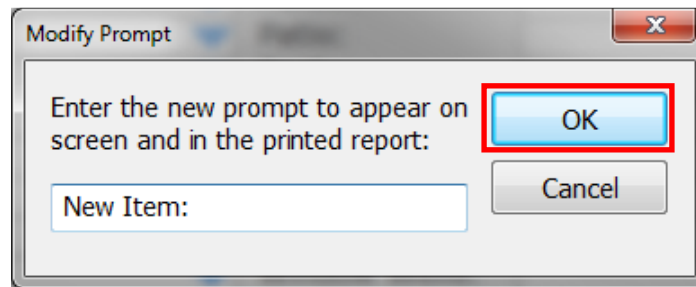


4. A copy of the line will now be inserted. The last step is to rename the line. You can do this by double clicking directly on the line prompt which is shown below.



How To: ADD NEW LINES

5. The 'Modify Prompt' window appears and here you can change the prompt to be whatever you want. Let's change it to say 'New Item'. Click 'OK' when finished and you're new line will be added in.



Making the New Line Permanent

1. By going to Tools->Save as Template you can create a new version of your template that includes the new line(s) that you added in. This makes it so that if you want this to be a permanent change you only have to walk through the process one time.