



# Palm-Tech

HOME INSPECTION SOFTWARE

Step by Step

## How To

# Email an Inspection Report as a PDF on a PC

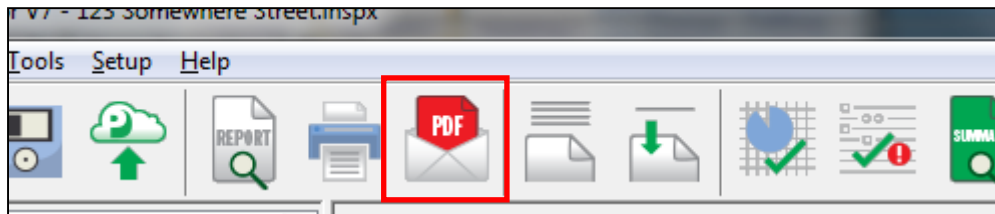
*This How To article explains how to email an inspection as a PDF on a PC*

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

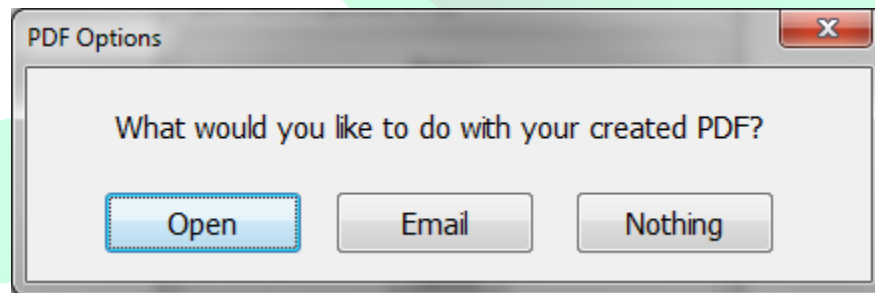
# HOW TO: EMAIL AN INSPECTION REPORT AS A PDF ON A PC

**When a report is complete you can easily turn it into a PDF that can then be emailed to your client.**

1. With the completed inspection report open, the first step is to click on the PDF icon from the toolbar.



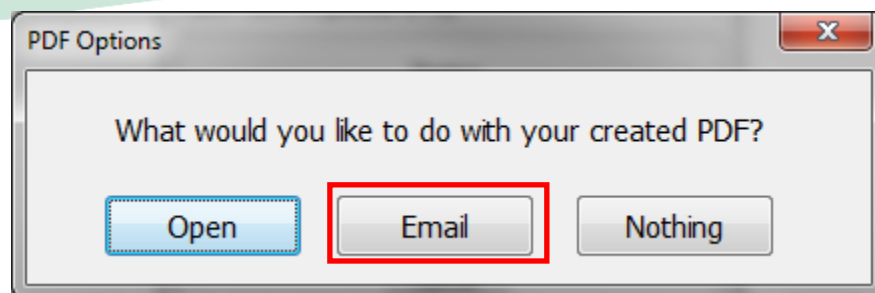
2. Next, a window appears letting you know that the PDF has been created and it asks what you would like to do with it. You have three options: 'Open', 'Email', or 'Nothing'.



3. From here, there are two processes to consider for emailing your inspection report. The first one is if your email program is installed locally on the computer such as Outlook. The second process is if you use a web based email that you have to log into. We'll cover both below.

## Use Locally Installed Email Program

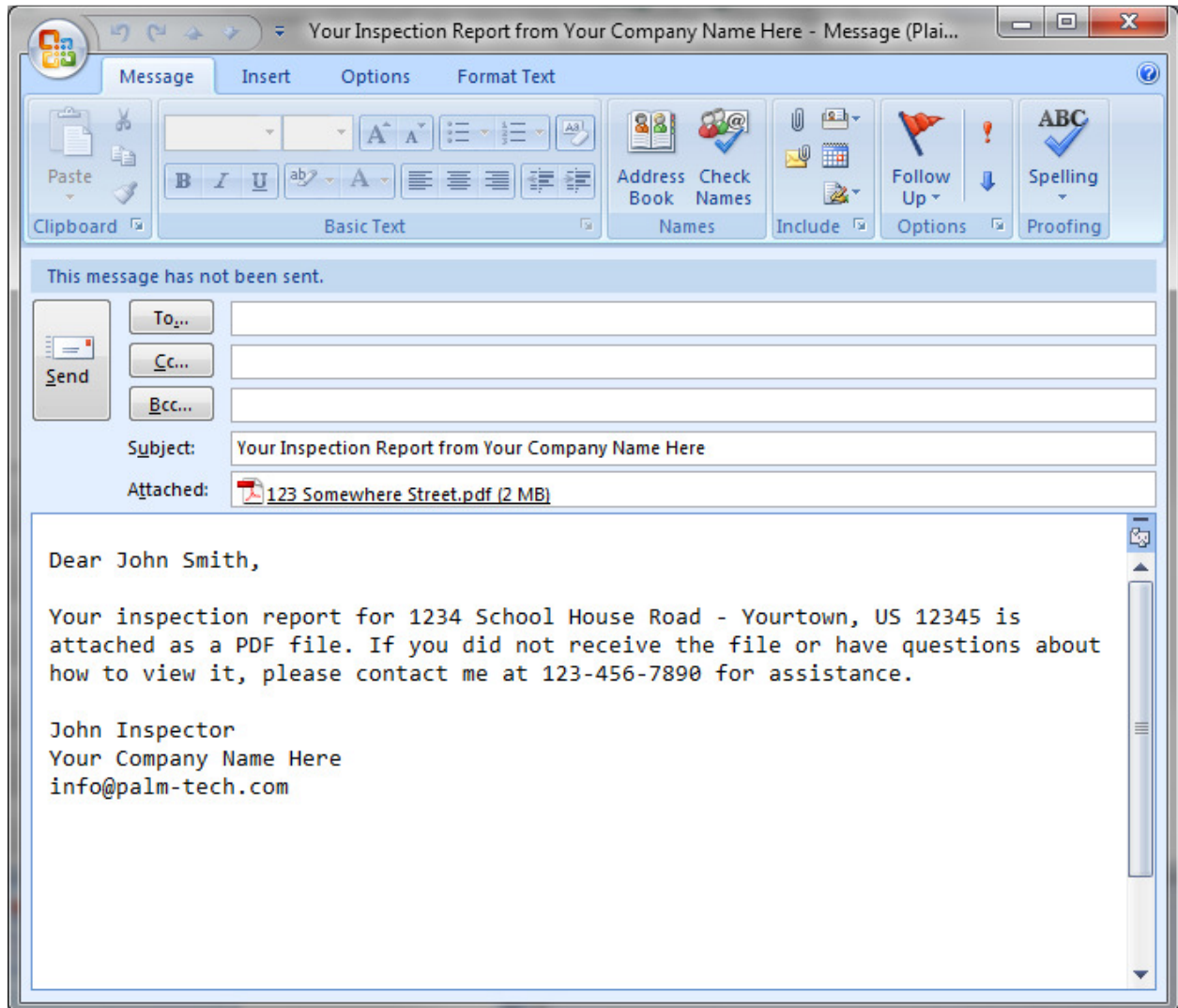
1. If you use a locally installed email program (such as Outlook) then click on 'Email'.



## HOW TO: EMAIL AN INSPECTION REPORT AS A PDF ON A PC

---

2. The program will automatically pull up your email program, start a new email and attach the inspection file to it. From here, you simply need to modify the text of the email as desired, put in the address you want to send it to and then send your email off to the client.

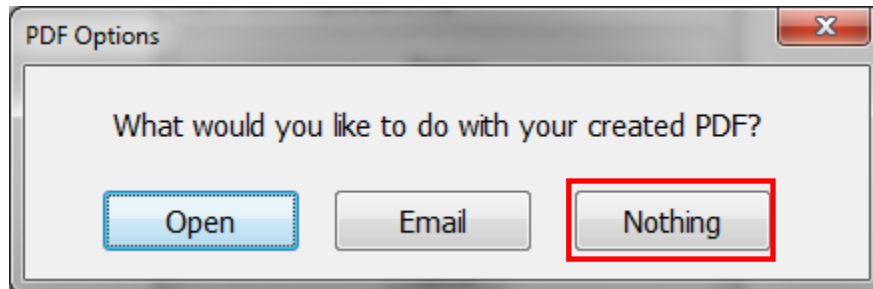


# HOW TO: EMAIL AN INSPECTION REPORT AS A PDF ON A PC

---

## Use a Web Based Email

1. If you use a web based email (such as gmail, yahoo, msn, etc) then the program is not able to automatically pull up your email since you have to first login into it. The first step here is to click on 'Nothing'.



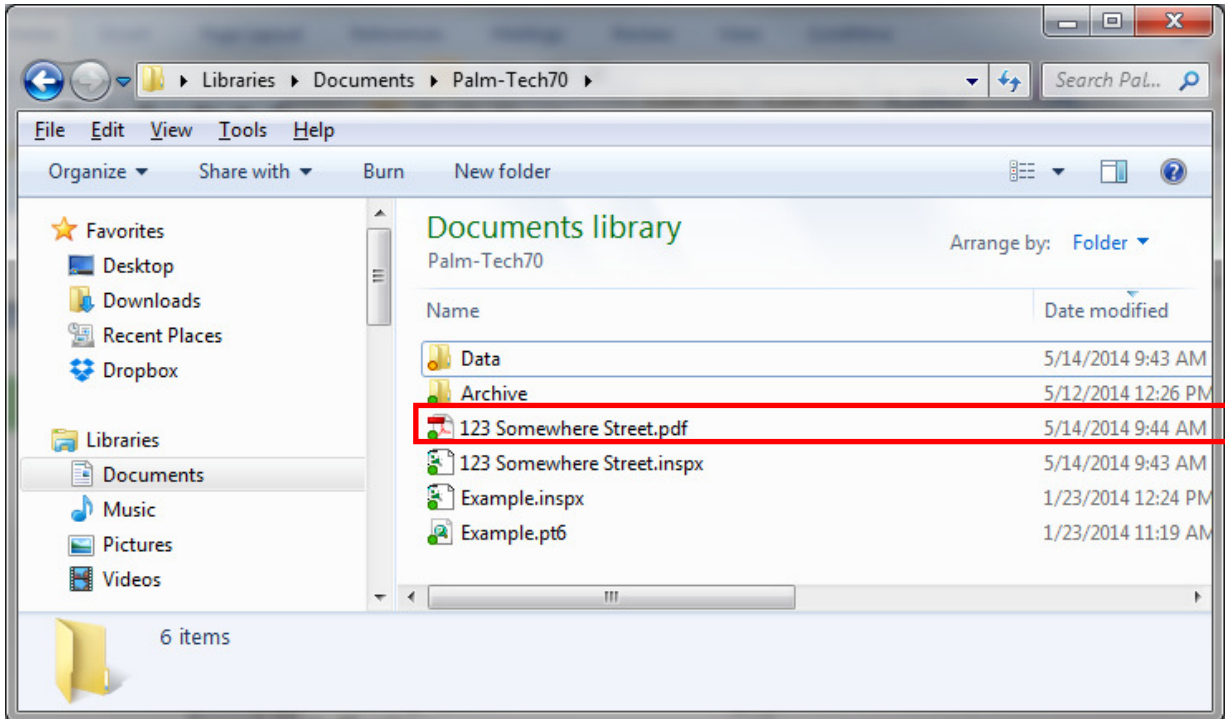
2. This will take you back to the Palm-Tech screen. At this point the PDF has been created and is ready to be emailed. The next step is for you to open up your email.
3. Once your email program is open, start a new email just like you would any other time.
4. Now, we need to attach the PDF of the inspection report to the email. To do this you'll need to click on whatever button in your email (each email works slightly differently) that will allow you to attach a file.

## HOW TO: EMAIL AN INSPECTION REPORT AS A PDF ON A PC

---

- Next, it'll bring up a screen that allows you to navigate to find the file you want to attach. When a PDF of a report is created it will go in the same folder that has the inspection file in it. By default, this will be C:\Documents\Palm-Tech70. Once you navigate to it, select the PDF of the inspection file and attach it.

**NOTE: It is important that you select the 'PDF' version of the inspection file and not the Palm-Tech Inspector version. If you send the wrong file then your client will not be able to open it to view.**



- From here, all you need to do is modify the rest of the email as desired and send it to your client.