



Palm-Tech
HOME INSPECTION SOFTWARE

Step by Step

How To

Import an Inspection

This How To article explains how to combine multiple inspection files into a single file

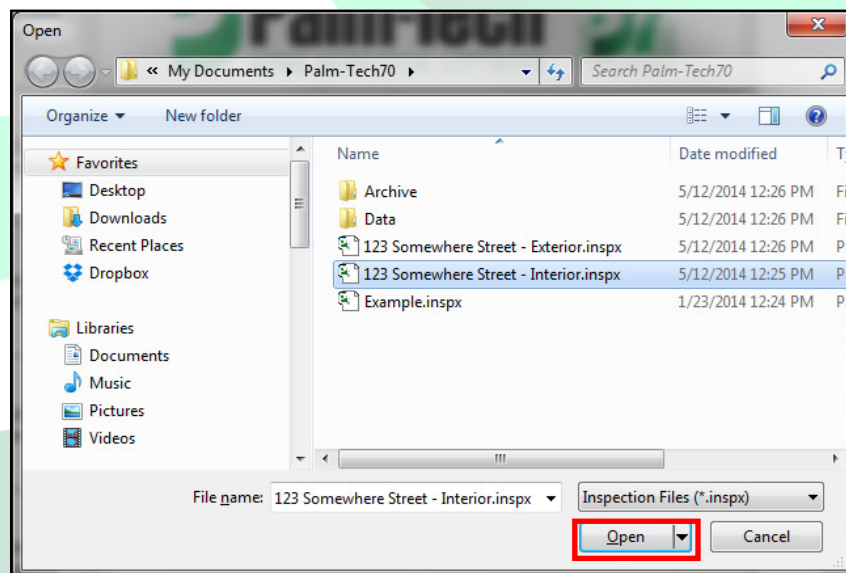
For a complete list of available How To documents visit the Support section of our website: www.palm-tech.com/support/

HOW TO: IMPORT AN INSPECTION

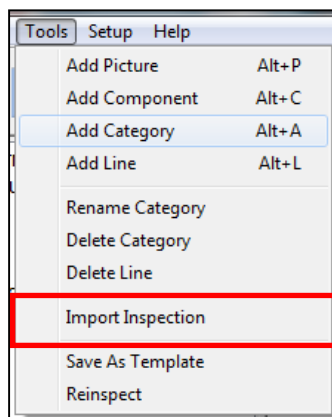
You can combine information from multiple inspection files into a single file with Palm-Tech. This is extremely helpful for inspection companies that take a 'team' approach to inspections. You are able to import entire categories (not individual lines) from one inspection into another.

NOTE: In order to import an inspection, both inspection files must have been created using the same template and library. You will also want to make sure each inspection has a different file name.

1. The first step is to open the inspection file that you want to import information into. This could be an existing inspection file or it could be a new one that you want to create. For this example we'll say that we had two inspectors conduct an inspection with one inspector doing the Exterior of the home and the other inspector doing the Interior. We want to combine their results into one file so we'll open the file for '123 Somewhere Street - Interior.inspx'. Select the file and click on 'Open'.

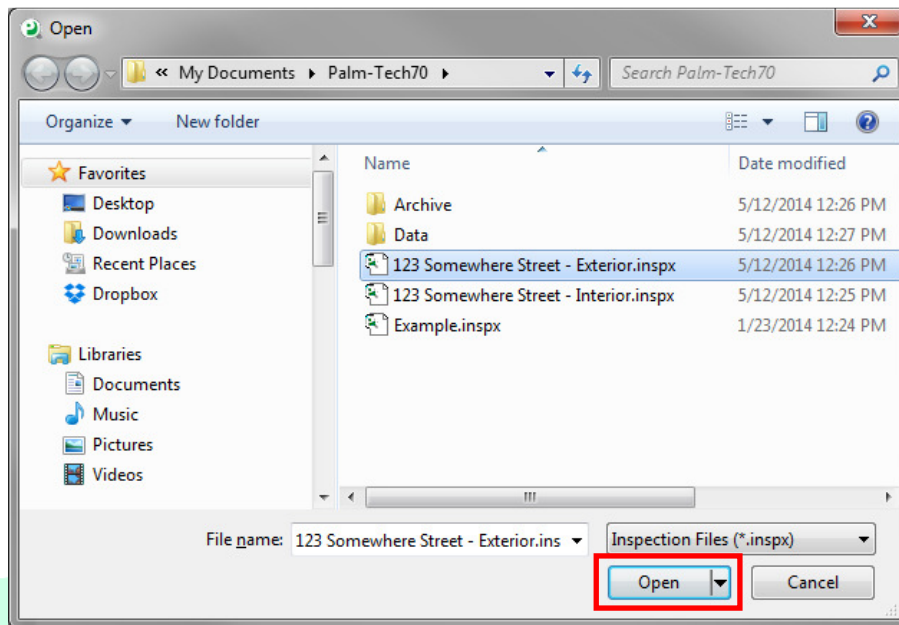


2. Next, go to Tools->Import Inspection.

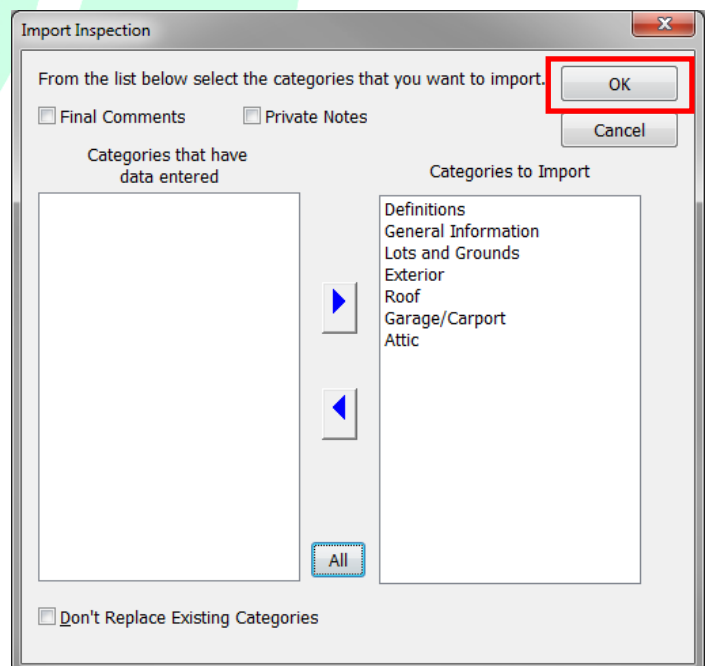
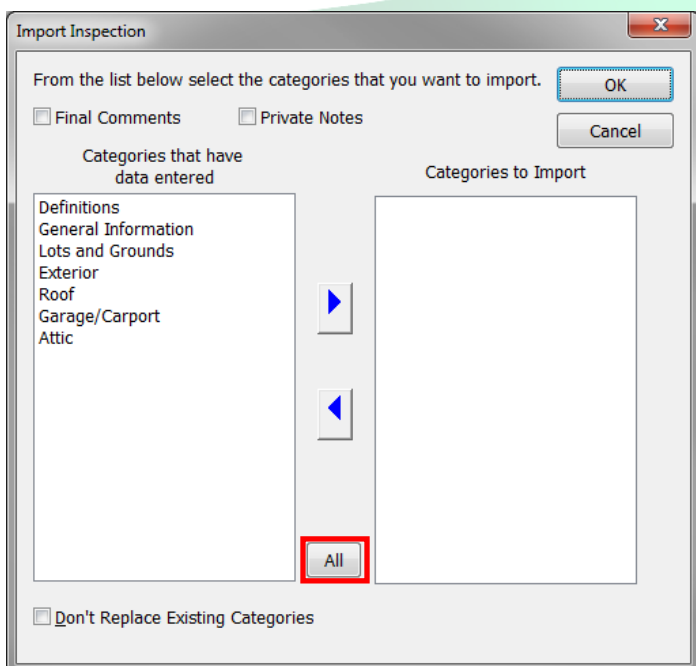


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- Next the 'Open' window appears. Here we select what file we want to import information from. Let's select '123 Somewhere Street - Exterior.inspx' and click on 'Open'.



- Next the 'Import Inspection' screen appears. Here it lists all of the categories from the inspection that have information entered and you can select which ones you want to import. You can send categories over one at a time by clicking on the top blue arrow, or if you want to send them all over simply click on 'All'. We want to send them all over so we'll click on 'All' and then click on 'OK'.



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5. You have now imported the exterior information into the interior inspection file. From here you can go to File->Save As to give it a new file name such as '123 Somewhere Street Complete'.

