



**Palm-Tech**  
HOME INSPECTION SOFTWARE

**Step by Step**

**How To**

**Import Version 4 Data  
into Version 7**

*This How To article explains how to import  
your templates and libraries from Palm-Tech  
4 into Palm-Tech 7*

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: IMPORT VERSION 4 DATA INTO VERSION 7

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When upgrading to Palm-Tech 7, you are able to import all of your templates and libraries from Palm-Tech 4 so that you don't lose any data when upgrading to the latest version. Because version 4 is several years old, there are a number of steps to complete this process. However, this How To will walk through it step by step.

In order to import from version 4, you will need to have versions 5, 6, and 7 installed on the same PC. Then you will import from version 4 to 5, 5 to 6, and then from version 6 to 7.

## Installing version 5 and importing

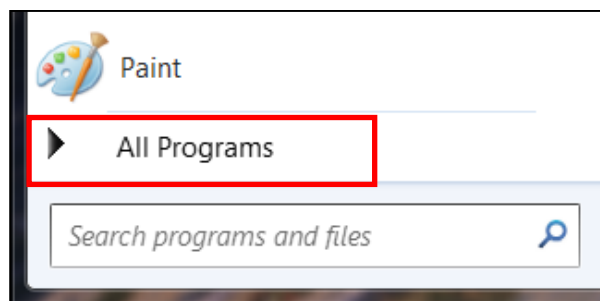
1. To import from version 4 to version 5, we'll first need to install version 5 on the same PC where version 4 is installed. To do this you'll click on the link to install version 5 from the setup email you received from Palm-Tech. Or you can install version 5 from here: <http://www.palm-tech.com/downloadv5demo.php>
2. Once version 5 is installed, you'll need to import your templates and libraries from version 4. First, we'll close out of any running programs.
3. Depending on your operating system, importing will work a little differently. We'll explain how to import while running Windows XP, Windows 7, and Windows 8 below:

### **Windows XP and 7**

- a. Click on Start.

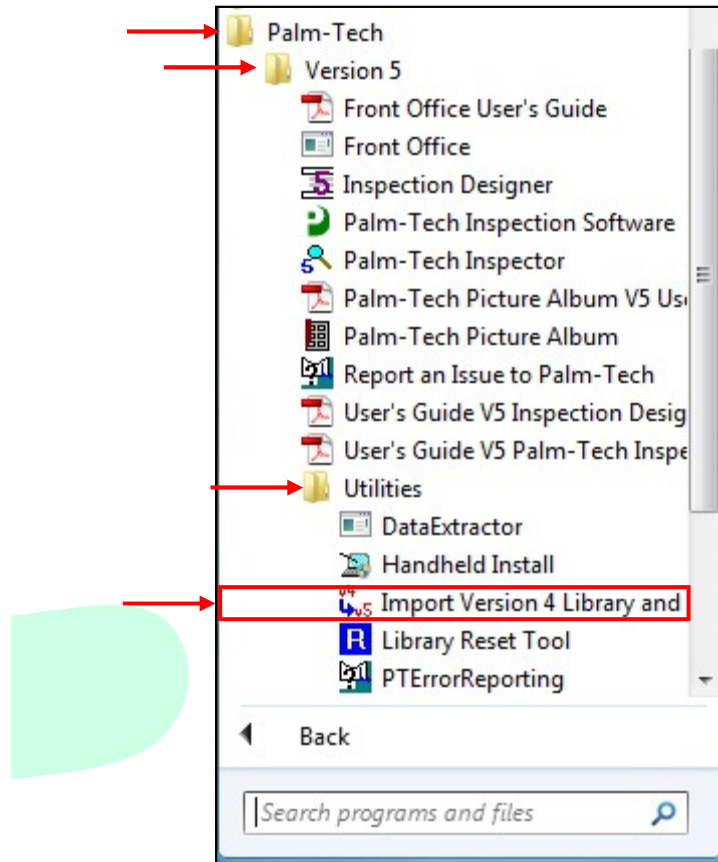


- b. Now click on All Programs.

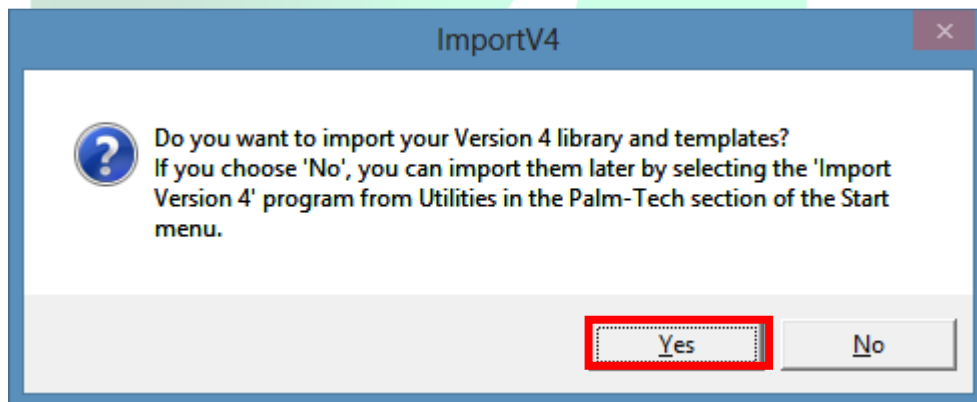


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- c. Next, click on Palm-Tech > Version 5 > Utilities > Import Version 4 Libraries and Templates.



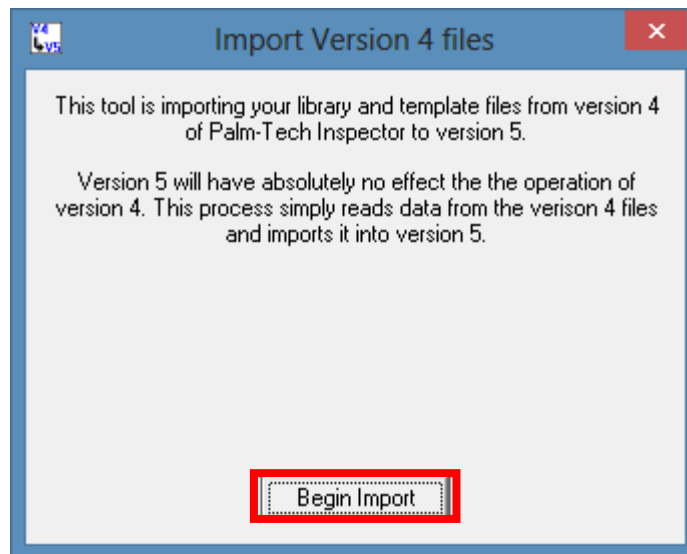
- d. A box will pop up asking if you want to import your libraries and templates from version 4, click 'Yes'.



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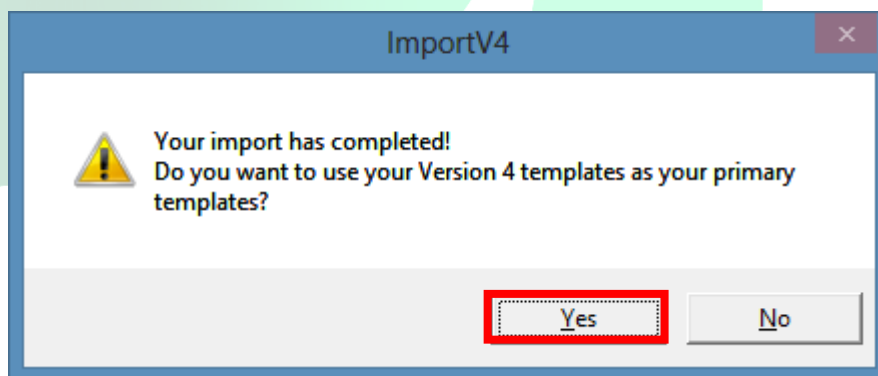
- e. Another box will pop up with information about the import process. To start the import, click 'Begin Import'.



- f. You will notice a progress bar on the screen and you should see your data being imported.

**NOTE:** If you are prompted to locate your version 4 folder, then this means that your Palm-Tech 4 folder is not saved in the default location. Simply locate where version 4 is installed, highlight it and click 'OK'.

- g. Once the import is complete, a box will appear asking if you want to use your V4 templates as your primary templates. Assuming you do, click 'Yes'.

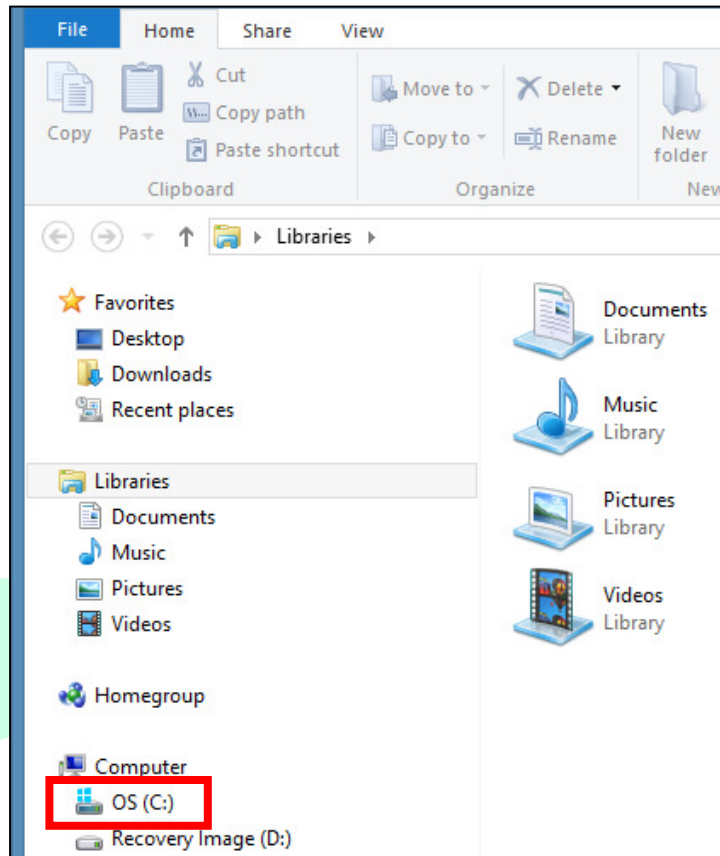


- h. The import process is now complete. To confirm it was completed successfully, start a new inspection with Palm-Tech 5 and check if your custom templates/dropdown answers are present.

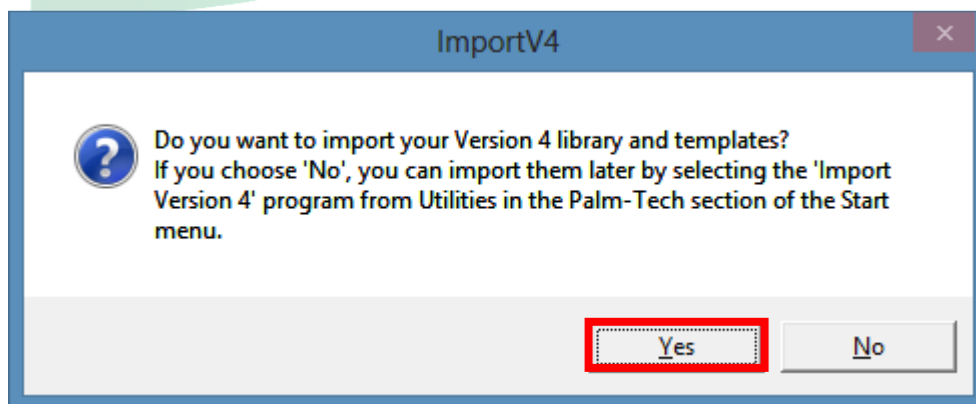
# HOW TO: IMPORT VERSION 4 DATA INTO VERSION 7

## Windows 8

- a. Click on File Explorer and navigate to the C: drive.



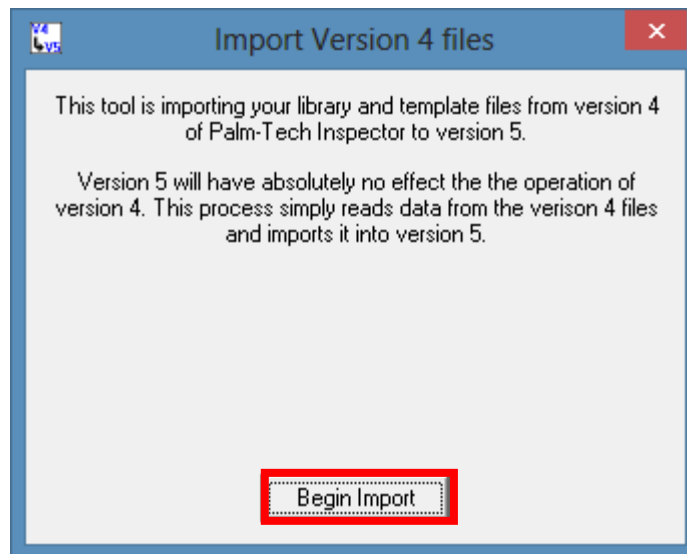
- b. Then click on Program Files (x86) > Palm-Tech5.
- c. Click on ImportV4.exe to start the import.
- d. A box will pop up asking if you want to import your libraries and templates from version 4, click 'Yes'.



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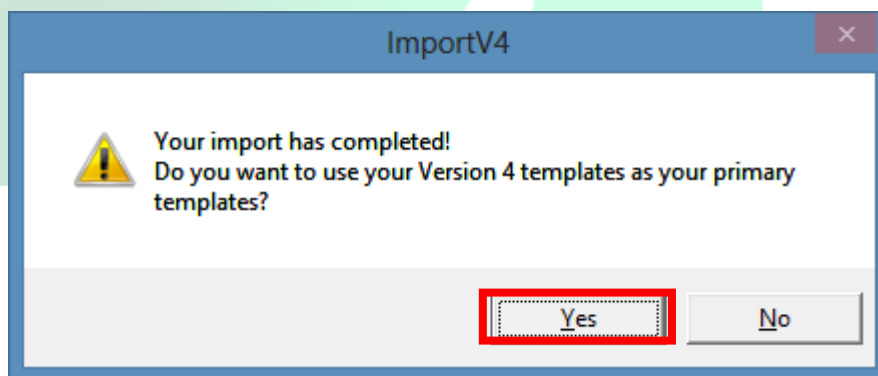
- e. Another box will pop up with information about the import process. To start the import, click 'Begin Import'.



- f. You will notice a progress bar on the screen and you should see your data being imported.

**NOTE:** If you are prompted to locate your version 4 folder, then this means that your Palm-Tech 4 folder is not saved in the default location. Simply locate where version 4 is installed, highlight it and click 'OK'.

- g. Once the import is complete, a box will appear asking if you want to use your V4 templates as your primary templates. Assuming you do, click 'Yes'.



- h. The import process is now complete. To confirm it was completed successfully, start a new inspection with Palm-Tech 5 and check if your custom templates/dropdown answers are present.

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**Now that your templates and libraries have been imported into version 5, we want to import the data into version 6.**

## Installing version 6 and importing

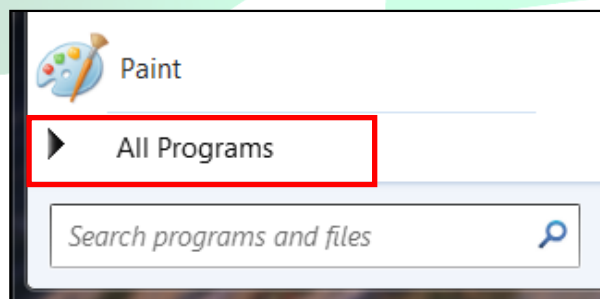
1. To import from version 5 to version 6, we'll first need to install version 6 on the same PC where version 5 is installed. To do this you'll click on the link to install version 6 from the setup email you received from Palm-Tech. Or you can install version 6 from here: <http://www.palm-tech.com/files/Setup6.exe>
2. Once version 6 is installed, you'll need to import your templates and libraries from version 5. First, we'll close out of any running programs.
3. Depending on your operating system, importing will work a little differently. We'll explain how to import while running Windows XP, Windows 7, and Windows 8 below:

### **Windows XP and 7**

- a. Click on Start.

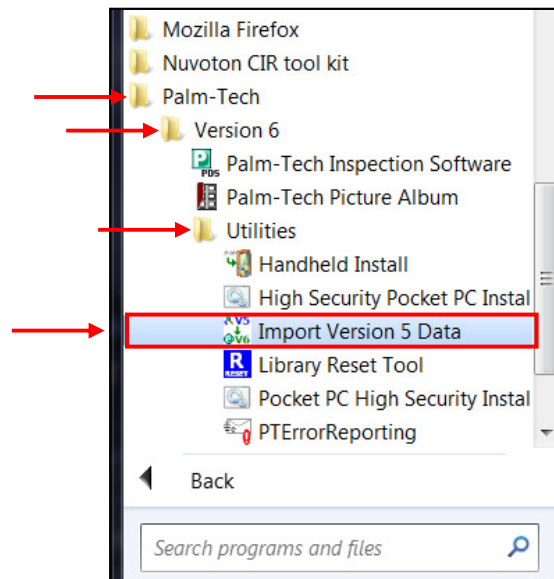


- b. Now click on All Programs.

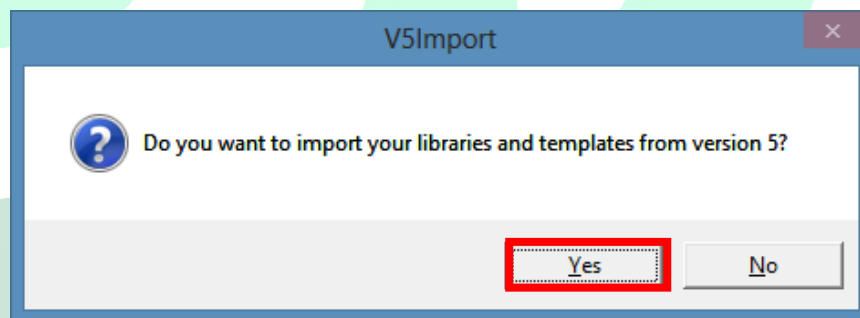


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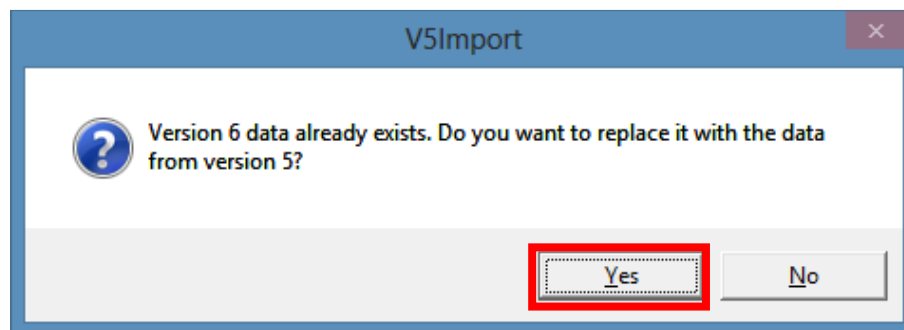
- c. Next, click on Palm-Tech > Version 6 > Utilities > Import Version 5 Data.



- d. A box will pop up asking if you want to import your libraries and templates from version 5, click 'Yes'.



- e. Another box will pop up asking if you want to replace your version 6 data with your version 5 data, click 'Yes'.





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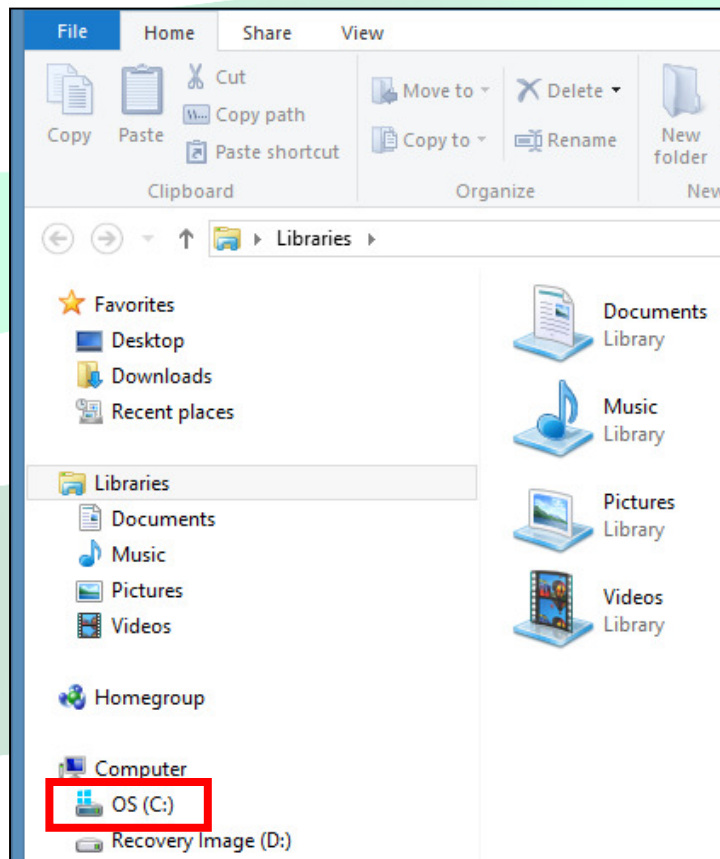
- f. You will notice a progress bar on the screen and you should see your data being imported.

**NOTE:** If you are prompted to locate your version 5 folder, then this means that your Palm-Tech5 folder is not saved in the default location. Simply locate where version 5 is installed, highlight it and click 'OK'.

- g. The import process is now complete. To confirm it was completed successfully, start a new inspection with Palm-Tech 6 and check if your custom templates/dropdown answers are present.

### Windows 8

- a. Click on File Explorer and navigate to the C: drive.

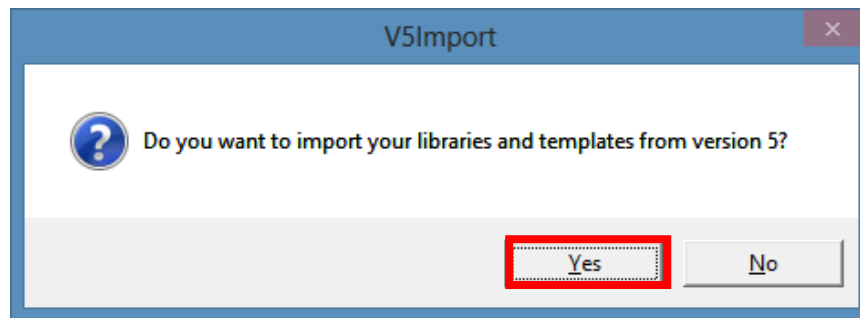


- b. Then click on Program Files (x86) > Palm-Tech6.
- c. Click on V5Import.exe to start the import.

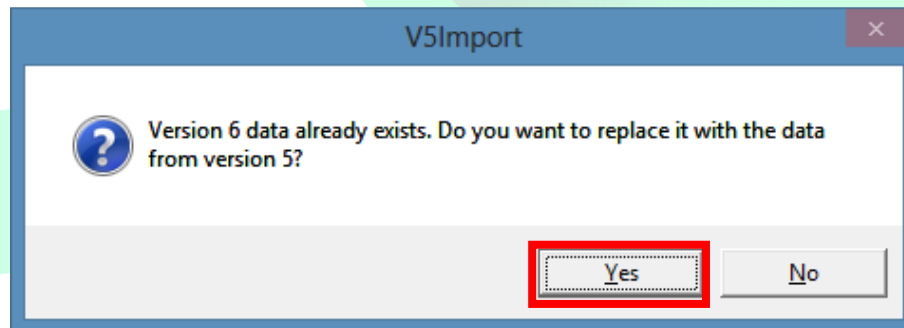
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- d. A box will pop up asking if you want to import your libraries and templates from version 5, click 'Yes'.



- e. Another box will pop up asking if you want to replace your version 6 data with your version 5 data, click 'Yes'.



- f. You will notice a progress bar on the screen and you should see your data being imported.

**NOTE:** If you are prompted to locate your version 5 folder, then this means that your Palm-Tech5 folder is not saved in the default location. Simply locate where version 5 is installed, highlight it and click 'OK'.

- g. The import process is now complete. To confirm it was completed successfully, start a new inspection with Palm-Tech 6 and check if your custom templates/dropdown answers are present.

4. Now that your templates and data have been imported into version 6, we want to import the data into version 7.

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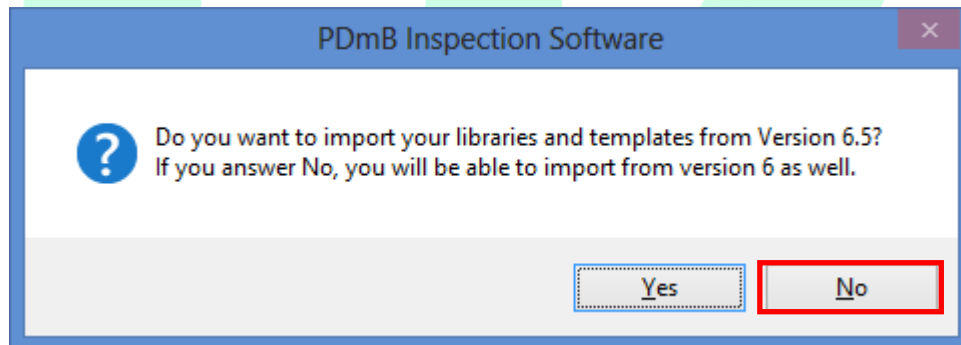
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Installing version 7 and importing – If you have already installed version 7, skip to page 13

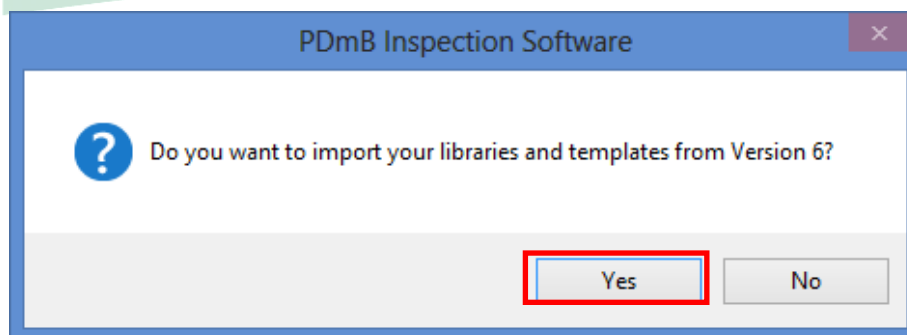
5. After installing Palm-Tech 7, double click on the Palm-Tech 7 icon on your desktop.



6. The program will recognize that you have a previous version of Palm-Tech already installed on the PC and will ask if you want to import your libraries and templates into version 7. The first box that appears asks if you want to import from version 6.5 and it lets you know that if you click 'No' you can import from version 6 with the next box. Since we are importing from version 6 for this How To, we'll click 'No' here.



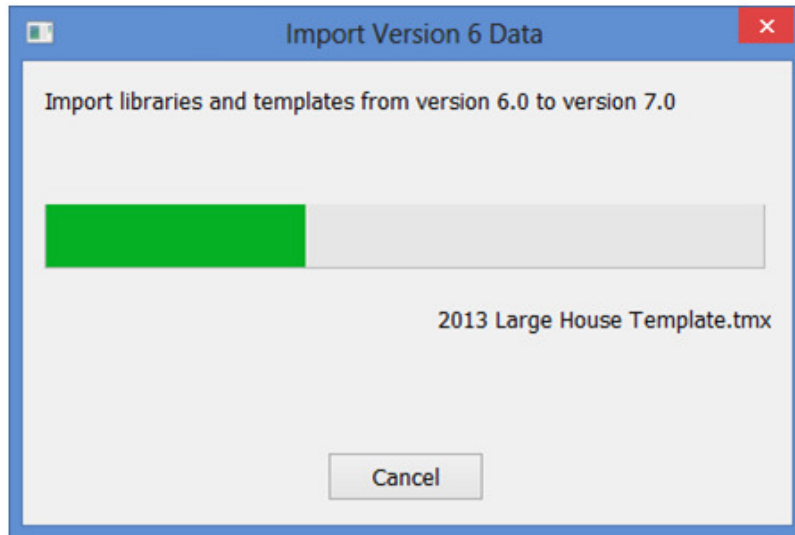
7. The next box that appears asks if you want to import from version 6, click 'Yes'.



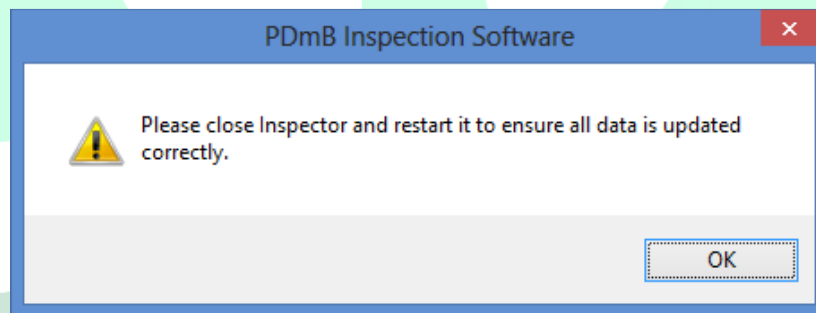
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8. A box will appear on screen showing the import in progress.



9. Once the import is finished, completely close out of Palm-Tech and then go back into the program.

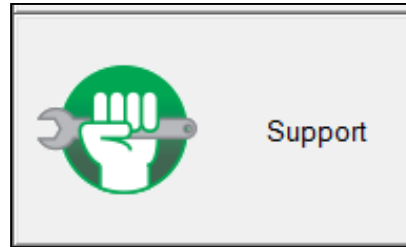


10. You have successfully imported your libraries and templates from version 6 into version 7.

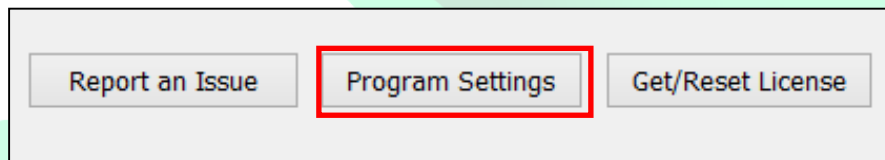
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## Importing your data after you have already installed version 7

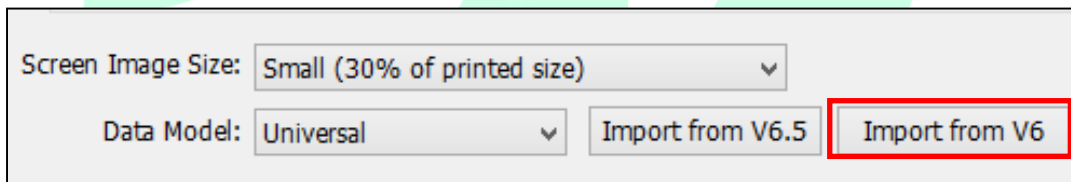
1. If Palm-Tech 7 is already installed on the PC and you are past the point where the program asks if you would like to import, there is another way to bring over your data from version 6. From the Palm-Tech shell, click on the Support Tab.



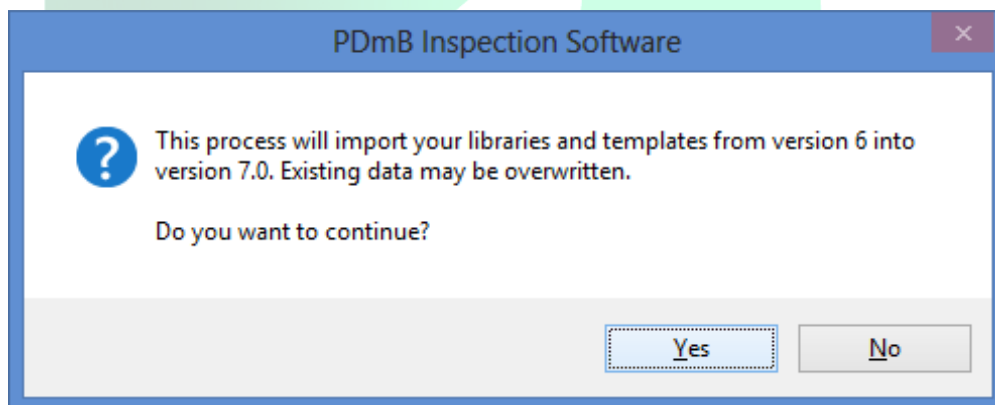
2. Next, click on the Program Settings button.



3. Then click on Import from V6.



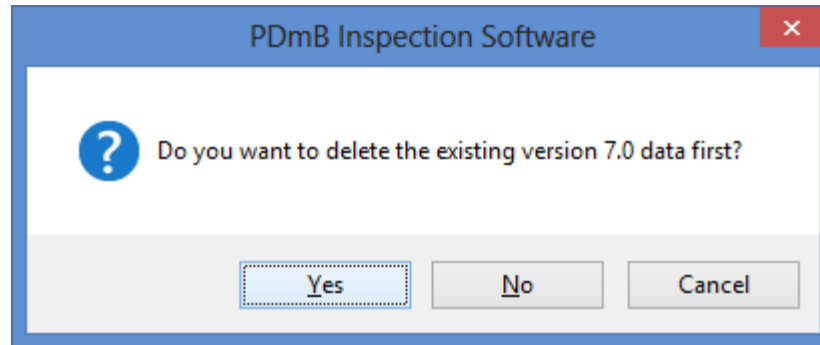
4. A box will appear warning that data may be overwritten. If you want to continue with the import, click 'Yes'.



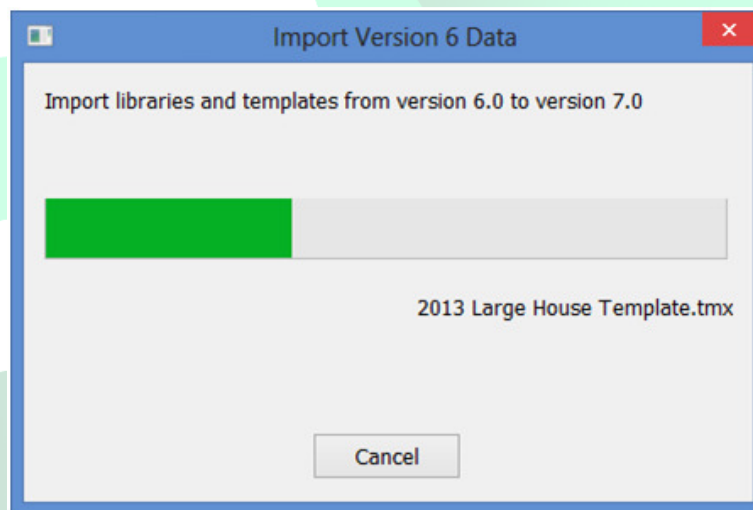
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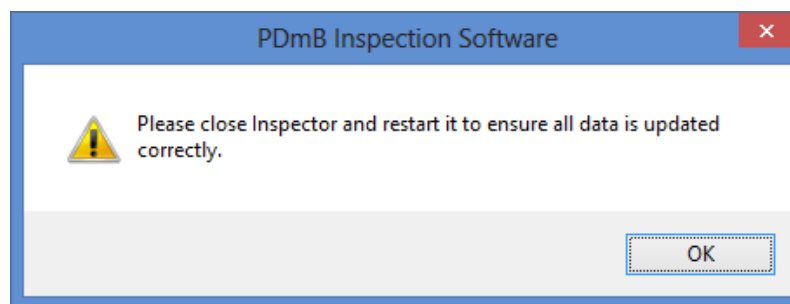
5. A second box will appear asking if you want to delete the existing version 7 data first. If you are just getting started with version 7 and don't have any data you want to save, click 'Yes'. If you click 'No', the program will ask you each time if you want to overwrite a file with the same name. Or you can click 'Cancel' to end the import.



11. A box will appear on screen showing the import in progress.



12. Once the import is finished, completely close out of Palm-Tech and then go back into the program.



13. You have successfully imported your libraries and templates from version 6 into version 7.