



Palm-Tech
HOME INSPECTION SOFTWARE

Step by Step

How To

**Import Version 6.5
Data into Version 7**

*This How To article explains how to import
your templates and libraries from Palm-Tech
6.5 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/

HOW TO: IMPORT VERSION 6.5 DATA INTO VERSION 7

When upgrading to Palm-Tech 7, you are able to import all of your templates and libraries from Palm-Tech 6.5 so that you don't lose any data when upgrading to the latest version. In order to import, you will need version 6.5 installed on the same PC as version 7.

There are two ways to import your data from version 6.5 into version 7 and we'll cover both below.

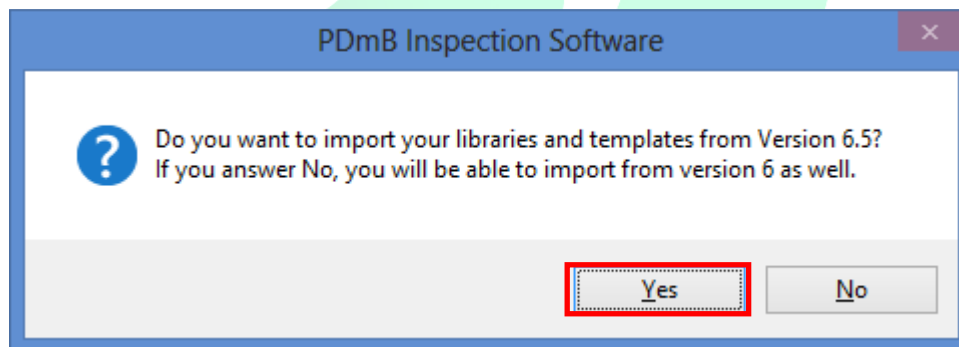
Importing your data from version 6.5 right after installing

NOTE – This process only works the first time you open version 7 after installation

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

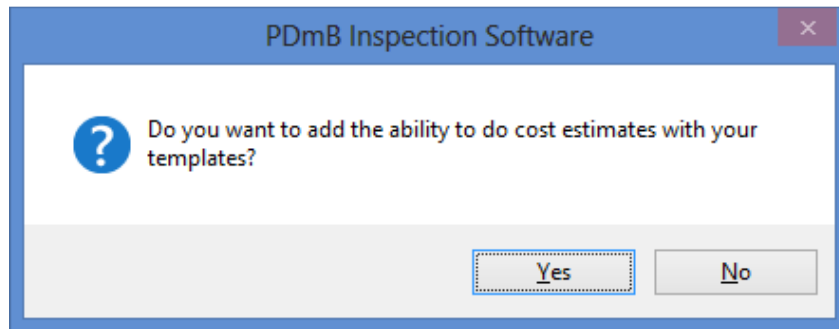


2. The program will recognize that you have Palm-Tech 6.5 already installed on the PC and will ask if you want to import your libraries and templates into version 7. Click 'Yes'.

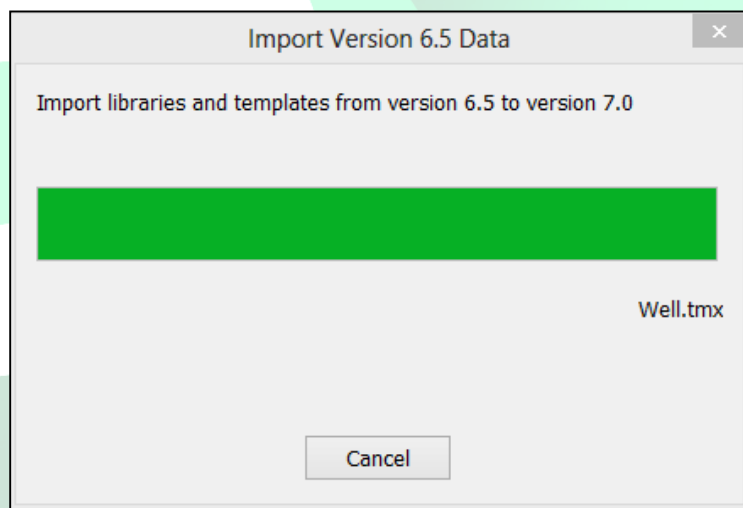


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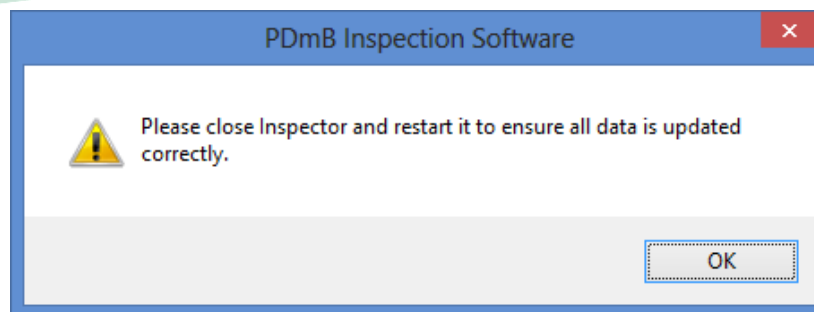
3. After clicking 'Yes', another box will appear asking if you want to add the ability to use cost estimates with your templates. Click Yes or No depending on if you want the ability to add costing information to your inspection. If you click Yes, you don't have to use cost estimates but it will allow you to do so at any point in time if you'd like to.



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



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

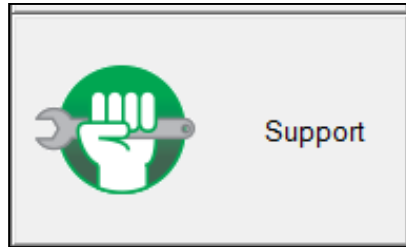


6. You have successfully imported your libraries and templates from version 6.5 into version 7.

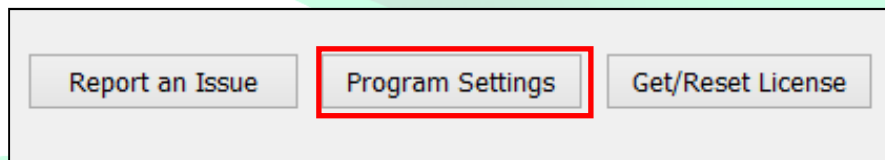
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Importing your data after you have already installed version 7

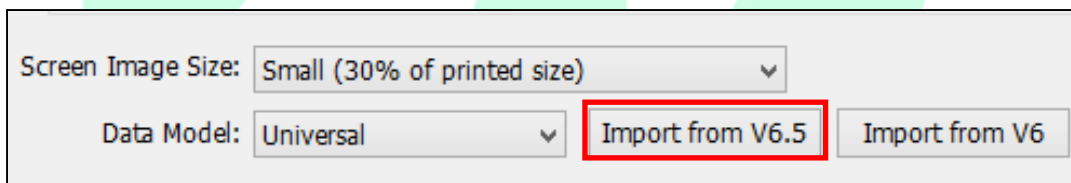
1. If Palm-Tech 7 is already installed on the PC and you are past the point where the program asks if you would like to import, there is another way to bring over your data from version 6.5. From the Palm-Tech shell, click on the Support Tab.



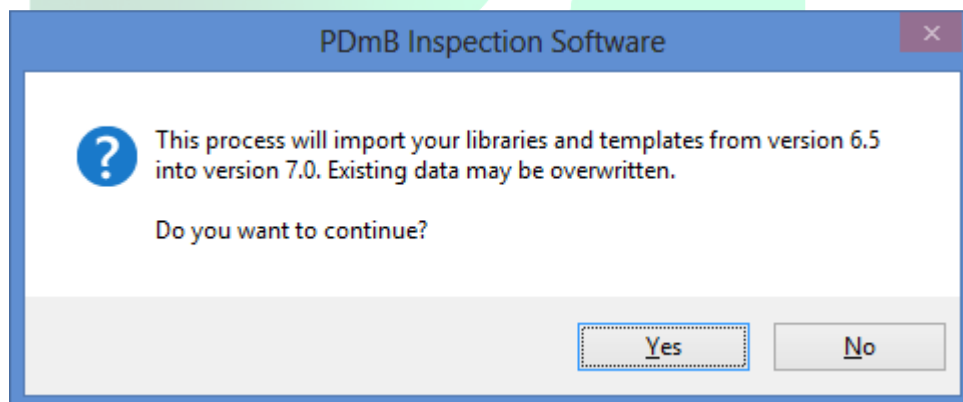
2. Next, click on the Program Settings button.



3. Then click on Import from V6.5.

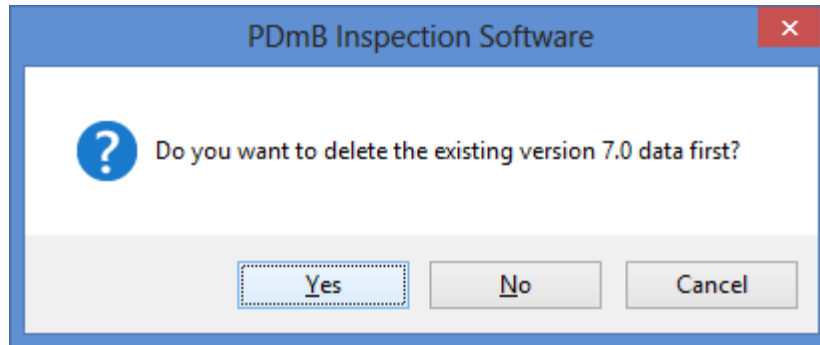


4. A box will appear warning that data may be overwritten. If you want to continue with the import, click 'Yes'.

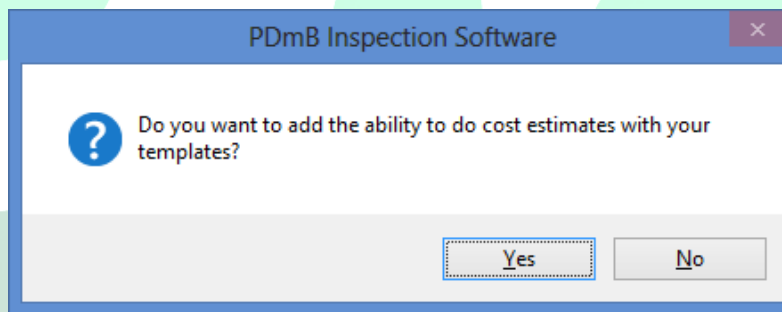


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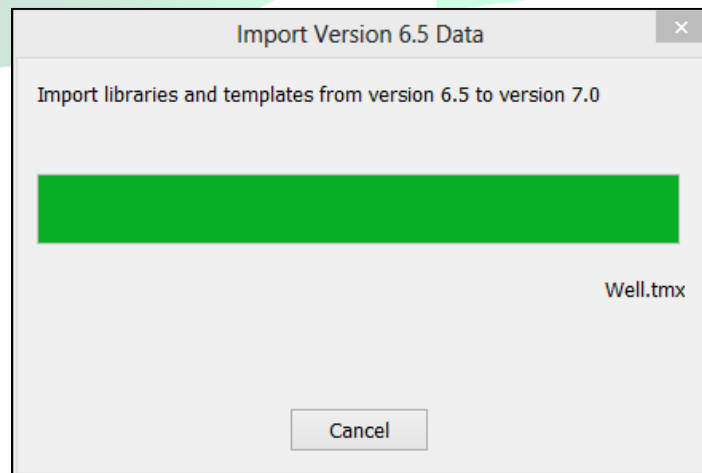
5. A second box will appear asking if you want to delete the existing version 7 data first. If you are just getting started with version 7 and don't have any data you want to save, click 'Yes'. If you click 'No', the program will ask you each time if you want to overwrite a file with the same name. Or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



7. Next, another box will appear asking if you want to add the ability to use cost estimates with your templates. Click Yes or No depending on if you want the ability to add costing information to your inspection. If you click Yes, you don't have to use cost estimates but it will allow you to do so at any point in time if you'd like to.

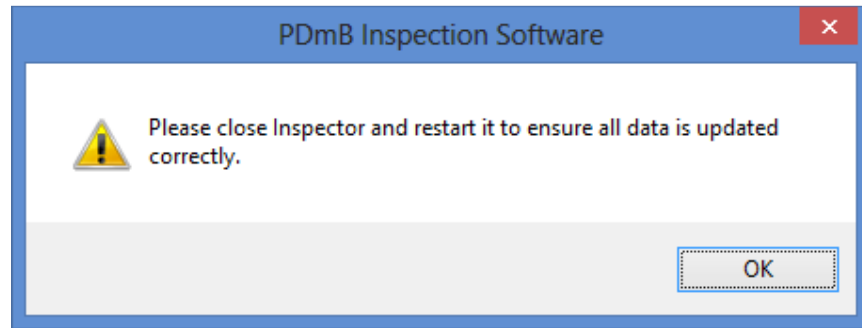


8. A box will appear on screen showing the import in progress.



HOW TO: IMPORT VERSION 6.5 DATA INTO VERSION 7

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 6.5 into version 7.

