



Palm-Tech

HOME INSPECTION SOFTWARE

Step by Step

How To

Save an Inspection as a Template

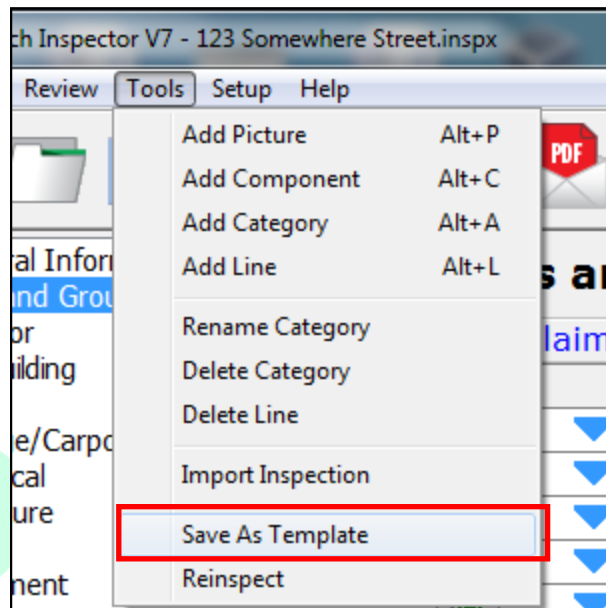
This How To article explains how to save an inspection as a new template

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

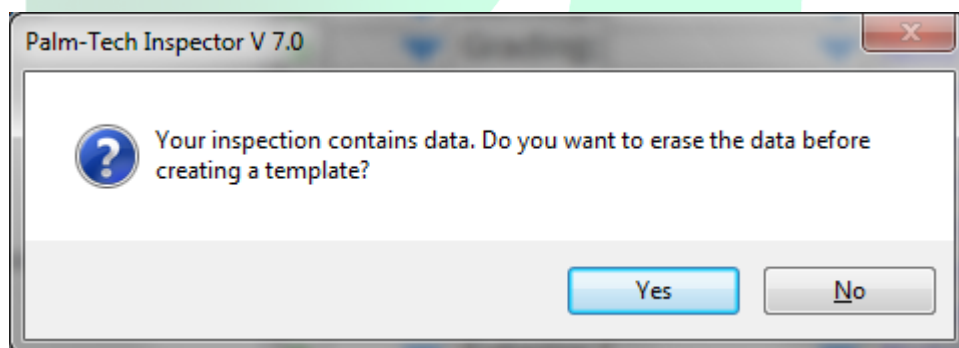
HOW TO: SAVE AN INSPECTION AS A TEMPLATE

You can make changes to inspections such as adding/deleting/renaming lines and categories. These changes can be made for an individual inspection, but you can also make the changes and save them as a template so that each time you start a new inspection the changes are there.

1. Once you have made all of the desired changes, the first step is to click on Tools->Save as Template.

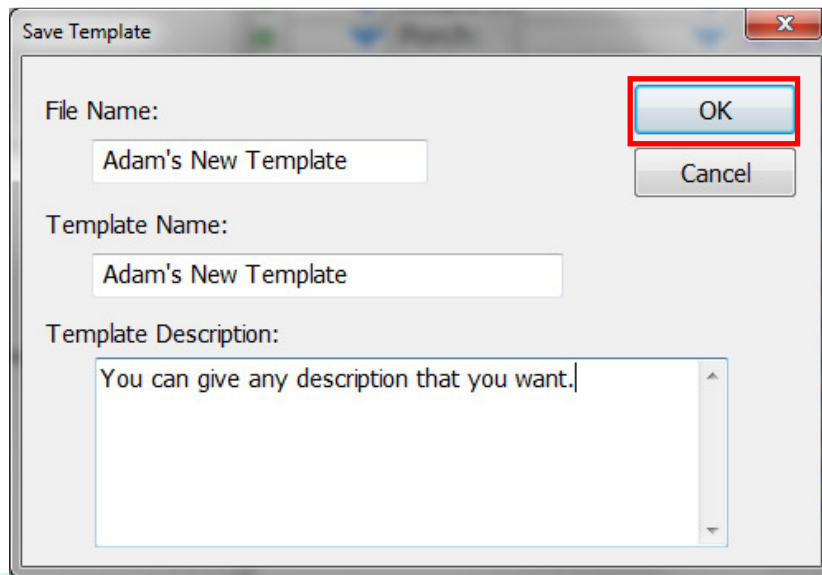


2. This will bring up a screen that says the inspection contains data and asks if you want to erase the data before creating a template. If you have entered data such as ratings, descriptions, notes, or info in the General Information that you want to keep as part of your template, click on 'No'. If you want to clear out all of the data click on 'Yes'.

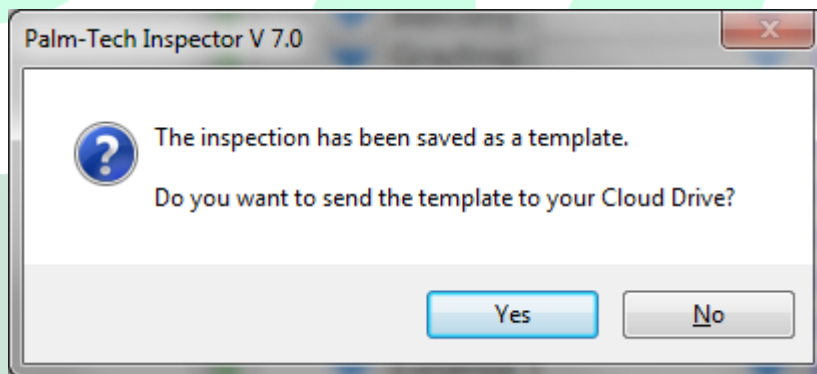


HOW TO: SAVE AN INSPECTION AS A TEMPLATE

- Next the 'Save Template' window appears. Here you give your template a 'File Name', 'Template Name', and a 'Template Description'. Once you have finished entering the information, click on 'OK'.



- Finally, there will be a window that states the template has been saved and asks if you want to send the template to your cloud drive. If you do, click on 'Yes'.



- You have now created a new template.