



# How To:

## **Add a Disclaimer to the Top of Summaries**

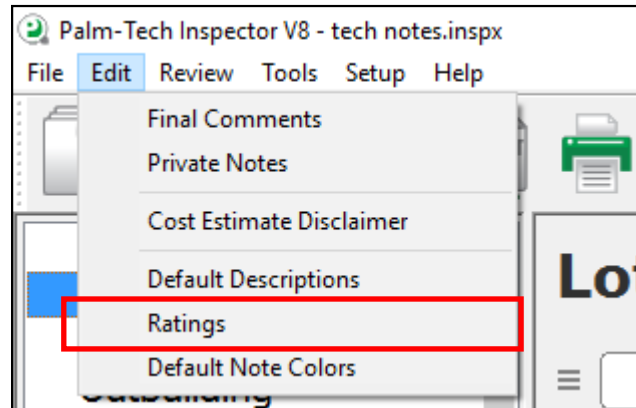
**This step by step How To article explains how to add a disclaimer to the top of the summaries that are created**

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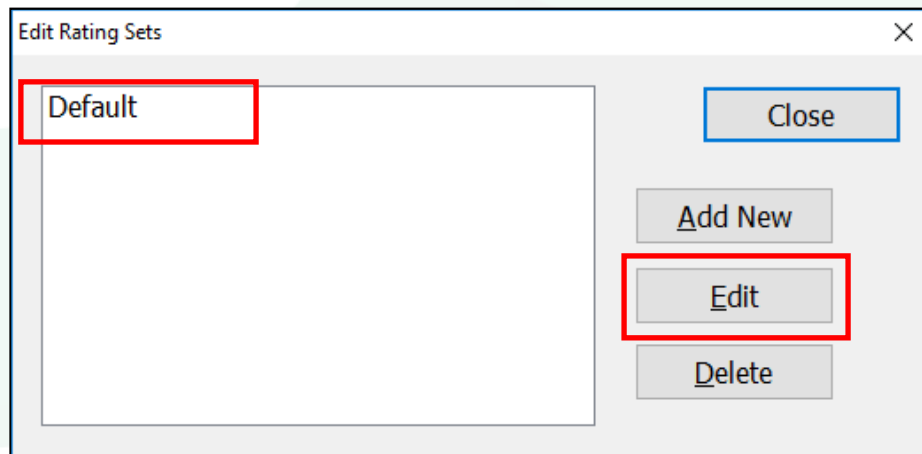
# How To: Add A Disclaimer To The Top Of Summaries

You can set it so that a block of text can appear at the top of each summary that is created. This is done by modifying the 'Summary Disclaimer'.

1. The first step for adding a disclaimer to the top of summaries is to open up the Palm-Tech program. You can do this by starting a new inspection or opening an existing one.
2. Next, click on Edit->Ratings from the top menu.



3. This brings up the 'Edit Rating Sets' window. Click on 'Default' and then on 'Edit'.



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4. We're now looking at the 'Edit Rating Set' screen. Here you can see all of the ratings currently in the rating set. To add a disclaimer to the top of the summary, click on the rating that creates a summary that you want to add the disclaimer to. For this example we'll use the 'Defective' rating.

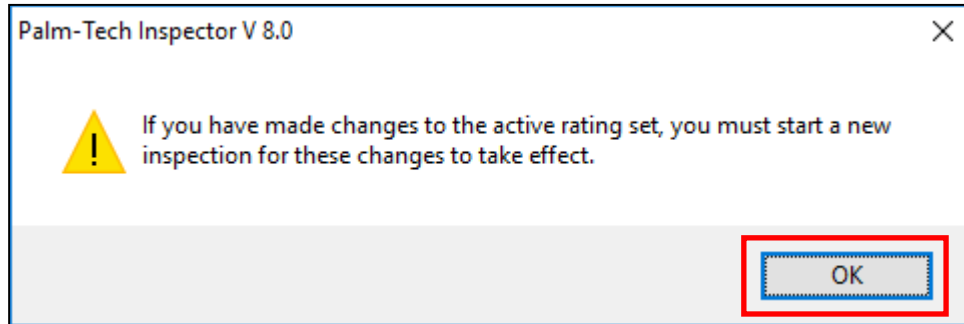
The screenshot shows the 'Edit Rating Set' window. At the top, there are fields for 'Name' (Default) and 'Rating Set ID' (1). A 'Disclaimer' field contains the text: 'NOTE: All definitions listed below refer to the property or item listed as inspected on this'. A 'Close' button is in the top right. Below these are 'Add Rating' and 'Delete Rating' buttons. A list of ratings is shown on the left: 'Acceptable', 'Not Present', 'Not Inspected', 'Marginal', 'Defective' (highlighted in blue), and 'Not Applicable'. The 'Defective' rating is selected. To the right, the 'Name' is 'Defective', 'Abbreviation' is 'D', and 'Rating Color' is 'Black'. The 'Explanation' field contains: 'Item needs immediate repair or replacement. It is unable to perform its intended function.' Below this are several checkboxes: 'Indicates item is not present (prints on report)', 'Indicates item is not applicable and should not print', 'Indicates item was not inspected (prints on report)', 'Use value for scoring' (with a text input), 'Include as being inspected for "Required" edits', 'Requires Note' (checked), and 'Create Summary of items marked with this rating' (checked). At the bottom, the 'Summary Disclaimer' field contains: 'This summary is not the entire report. The complete report may include additional information of concern to the client. It is recommended that the client read the complete'.

5. In the lower right corner we have a spot for the Summary Disclaimer. By default there is already some text there, but you can easily modify it, remove it completely or add in new text by simply clicking in the box and making the desired changes.

This is a close-up of the 'Edit Rating Set' window. The 'Defective' rating is selected in the list on the left. The 'Summary Disclaimer' field is highlighted with a red box and contains the text: 'This is the text that you want to appear at the top of the Defective summary. You can have as much or as little text as you want.' The other fields and checkboxes are visible but not the focus of this image.

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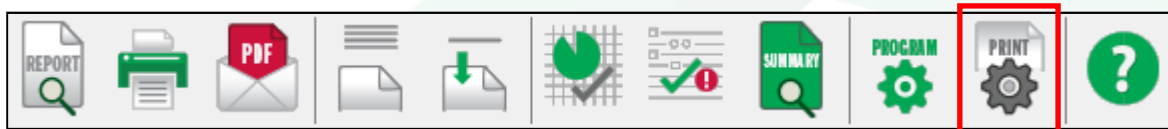
- When you are finished with your changes click 'Close' and then 'Close' again. A message will pop up that says you must start a new inspection for your changes to take effect. This means that the changes you made to the summary disclaimer will only impact future inspections that you start and not past inspections. Click 'OK'.



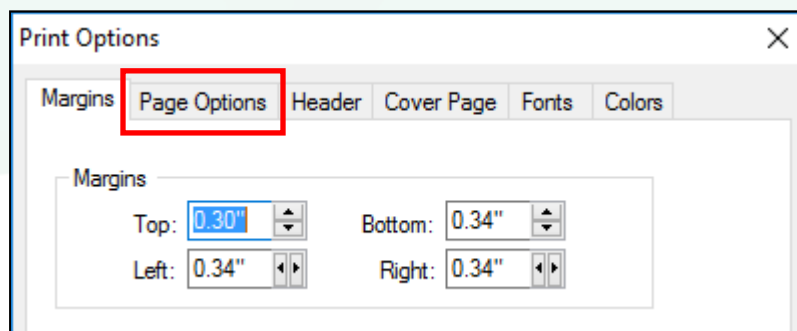
- The next time you start a new inspection your changes will be there.

## If You Have it Set to Combine Your Rating Summaries into a Single Summary

- There is an option in 'Print Settings' that allows you to combine your summaries into a single summary. If this option is checked, then the process for modifying the disclaimer at the top of the combined summary is different. The first step is to click on the 'Print Settings' icon from the toolbar.

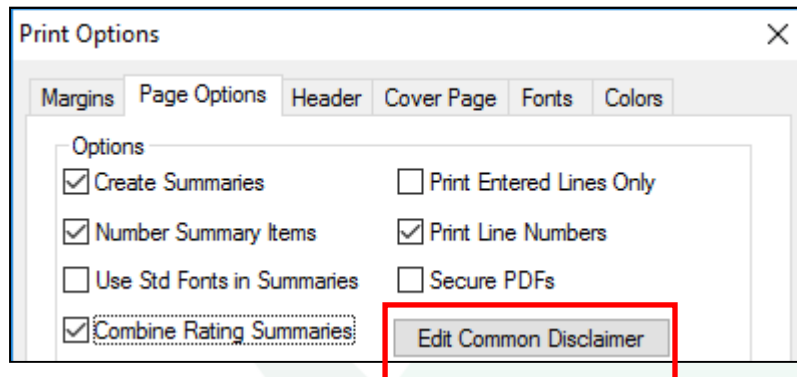


- This brings up the 'Print Options' screen. Tap on the 'Page Options' tab.

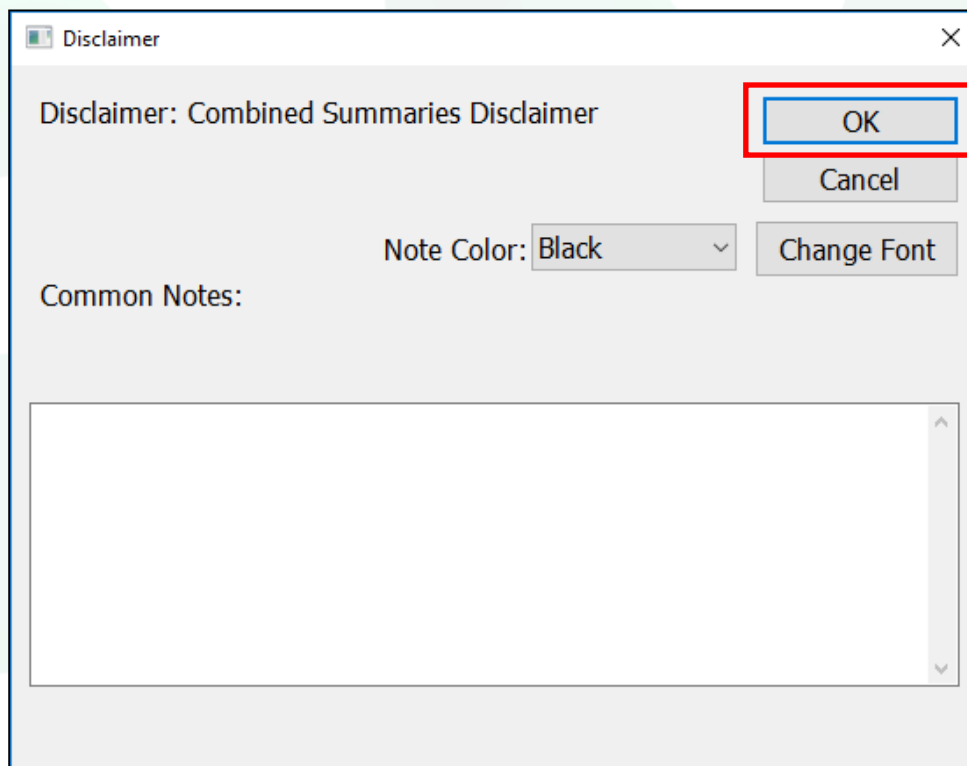


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3. On this screen you'll see a button for 'Edit Common Disclaimer'. This will only be an option if you have checked the box next to 'Combine Rating Summaries'. Tap on this box to add a disclaimer to the top of the combined summary.



4. On the window that appears you can add in your summary disclaimer. Click on 'Close' when finished.



5. Next, click 'OK' on the 'Print Options' screen and you have successfully made the change.