



How To:

Add a New Category

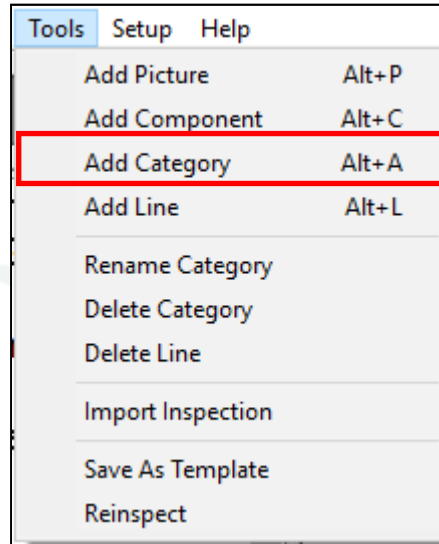
This step by step How To article explains how to add categories into your inspections

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

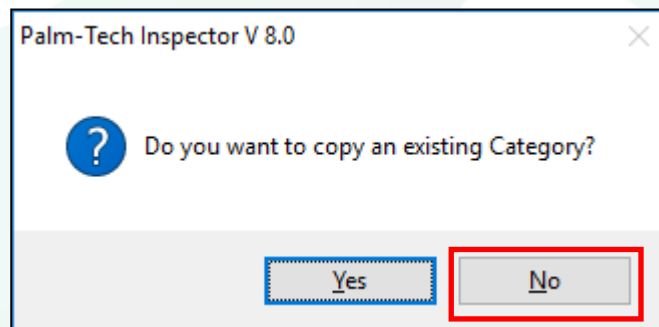
How To: Add A New Category

You can make changes to your inspections and templates. One of the changes you can make is adding new categories.

1. The first step is to click on Tools->Add Category.



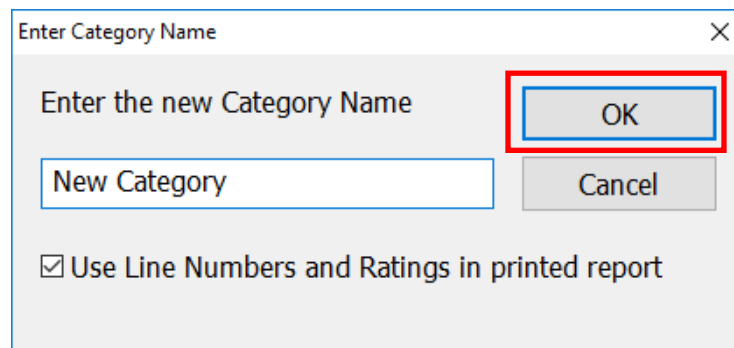
2. Next, you will be prompted with the following question 'Do you want to copy an existing category?'. If you click on 'Yes' you will be able to make an exact copy of an existing category and then give it a new name. If you select 'No' you will be able to add in a new, blank category. Click on 'No'.



HOW TO: ADD A NEW CATEGORY

- Next you can enter the new category's name. For this example we'll call it 'New Category'. Notice there is a box at the bottom to use line numbers and ratings in the new category. If you are adding a category with only text, such as an Inspection Agreement, you'll most likely want to uncheck this box. For this example, we'll leave it checked.

Click on 'OK' when finished.



Enter Category Name

Enter the new Category Name

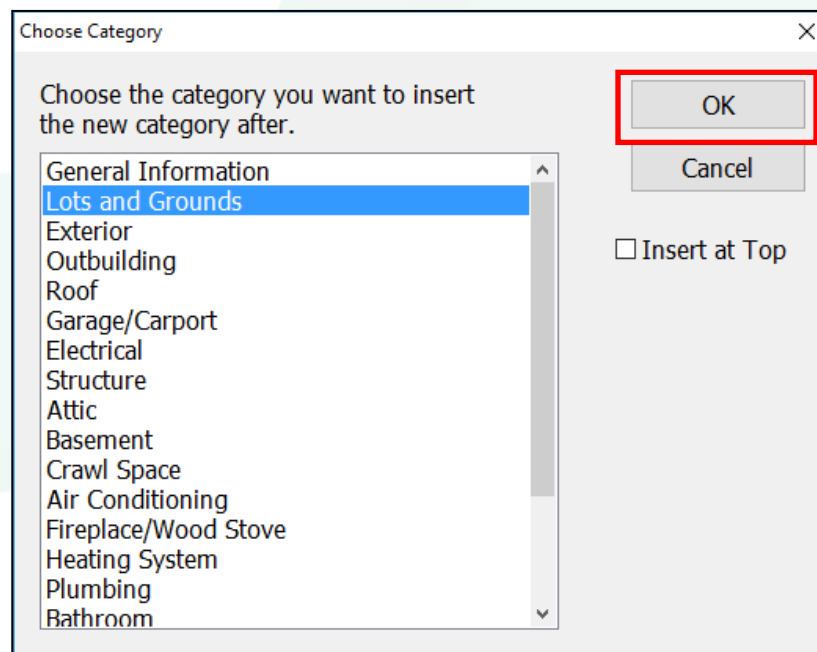
New Category

Use Line Numbers and Ratings in printed report

OK

Cancel

- Now pick where you want the new category to show in the category list. Click on the category you want the new category to appear after (or click 'Insert at Top'). Click 'OK' when finished.



Choose Category

Choose the category you want to insert the new category after.

General Information

Lots and Grounds

Exterior

Outbuilding

Roof

Garage/Carport

Electrical

Structure

Attic

Basement

Crawl Space

Air Conditioning

Fireplace/Wood Stove

Heating System

Plumbing

Bathroom

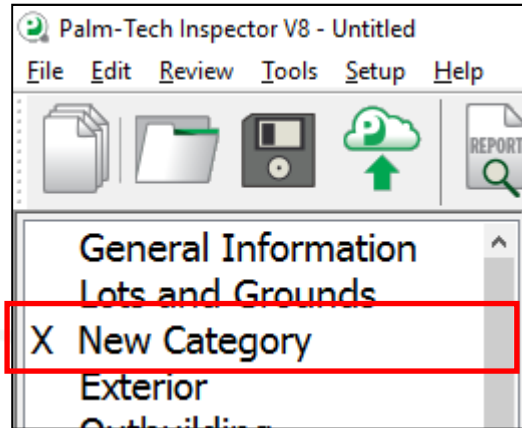
OK

Cancel

Insert at Top

How To: Add A New Category

- The category has now been added. From here you can add in new lines and components to set the category up with the exact information that you want.



- By going to Tools->Save as Template you can create a new version of your template that includes the new category(s) that you added in. This makes it so that if you want this to be a permanent change you only have to walk through the process one time.