



How To:

Add an Inspection Agreement

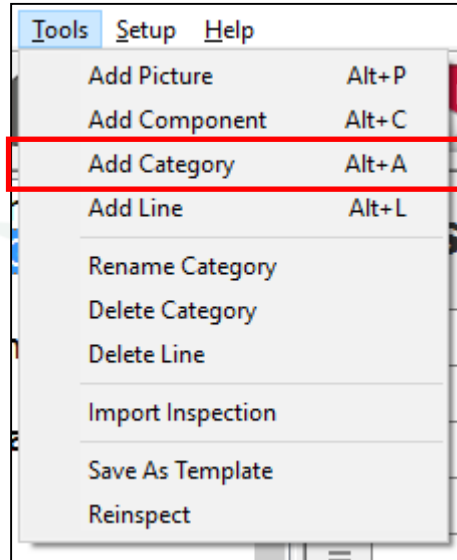
This step by step How To article explains how to add in an inspection agreement

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

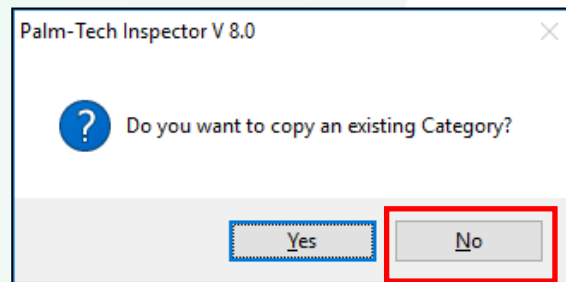
How To: Add An Inspection Agreement

You can add in your inspection agreement so that it is part of every inspection report you create with Palm-Tech.

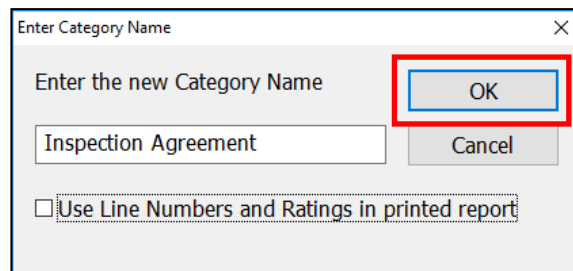
1. The first step for adding in your agreement is to add a new category for it. To do this click on Tools->Add Category.



2. Next, you will be prompted with the following question 'Do you want to copy an existing category?'. For our agreement we want to add in a new category so click on 'No'.

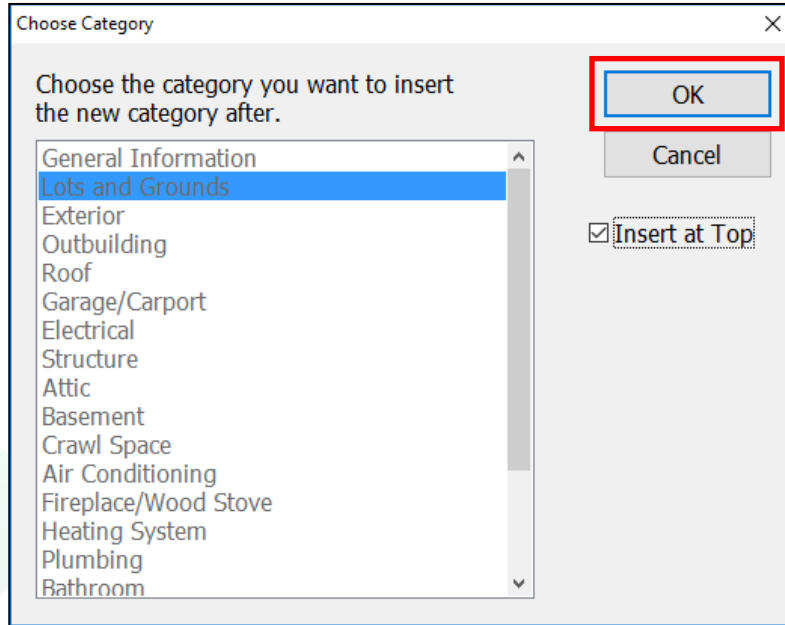


3. Next you can enter the new category's name. For this example we'll call it 'Inspection Agreement'. You'll also want to uncheck the box for 'Use Line Numbers and Ratings in printed report'. Click on 'OK' when finished.

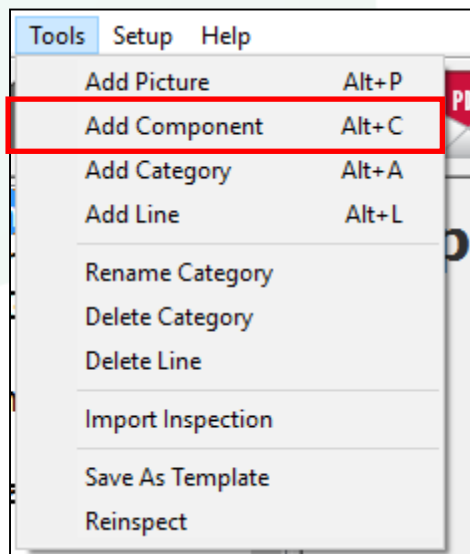


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- Now pick where you want the new category to show in the category list. Click on the category you want the new category to appear under (or click 'Insert at Top'). Let's click 'Insert at Top' so that it is the first category in the report. Click 'OK' when finished.

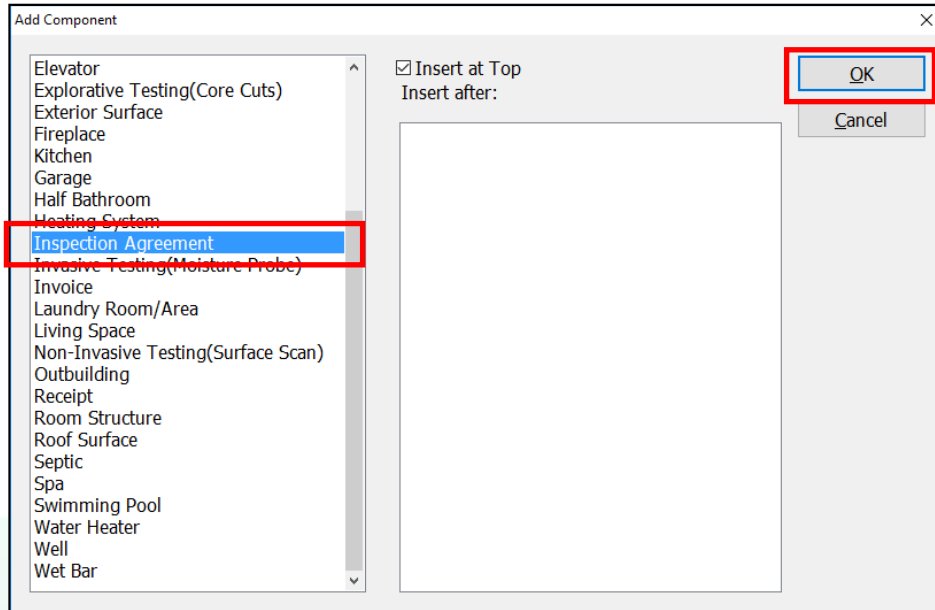


- The category has now been added. Next, we need to add in the inspection agreement component. To do this, first click on the 'Inspection Agreement' category (you'll notice that it is empty) and then go to Tools->Add Component.

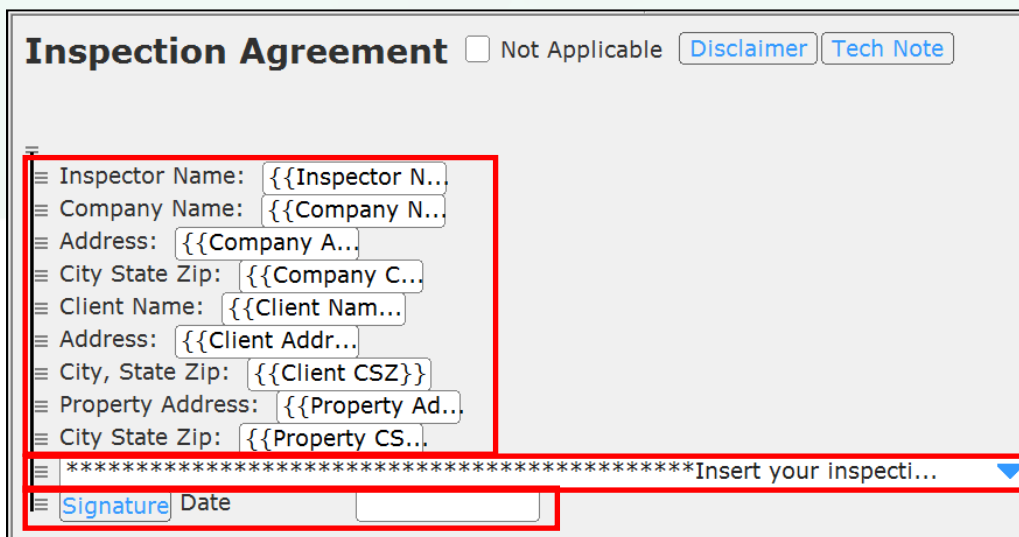


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6. On the 'Add Component' screen select the 'Inspection Agreement' component from the component list and then click on 'OK' to continue.



7. The 'Inspection Agreement' component will now be added into the category. The component is broken up into 3 sections. The first section includes basic information about your company and the property you are inspecting. It uses merge fields to auto-populate this information from what is entered in the General Information category. The second section is a single line that you can click on to add the actual text of your agreement. The final section is a line that includes a spot where you can collect an electronic signature from your client and the date.



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8. To add in the text of your inspection agreement, click on the line in section two.

The screenshot shows a form with several fields. The first two fields are "Property Address: {{Property Ad..}}". The third field is "City State Zip: {{Property CS..}}". Below these is a line of asterisks followed by the text "Insert your inspecti...". This line is highlighted with a red rectangular box. Below the asterisks are fields for "Signature" and "Date".

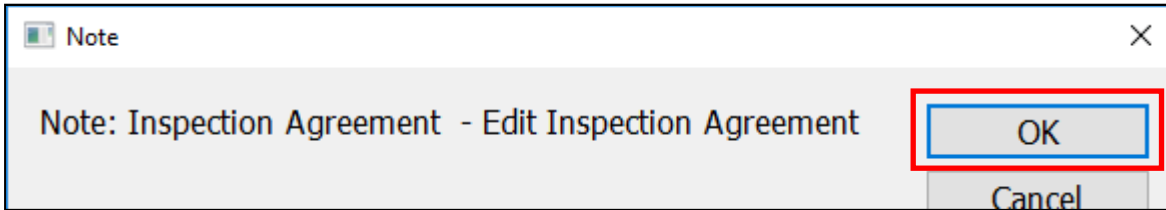
9. This will bring up the 'Edit Note' screen. By default it includes some information that serves as a placeholder and you can easily remove it by highlighting it and deleting it out. From there you can type in your agreement, or most inspectors will simply copy it from another location (PDF, Word Doc, etc) and paste it in.

The screenshot shows a dialog box titled "Note" with the subtitle "Note: Inspection Agreement - Edit Inspection Agreement". It has "OK" and "Cancel" buttons. Below the buttons are "Add to Summary:" and "Note Color: Black" with a dropdown arrow, and a "Change Font" button. Under "Common Notes:" there is a dropdown menu and an "Edit List" button. The main text area contains a placeholder: "Insert your inspection agreement here." followed by instructions on using merge fields like {{Client Name}}, {{Property Address}}, {{Company Name}}, and {{Company Address}}. At the bottom right is a button labeled "Add selected text to library list".

The screenshot shows the same "Edit Note" dialog box. The main text area now contains the text: "This is your new inspection agreement text. This can be as long or as short as you want." followed by "The easiest and fastest way to get this text into Palm-Tech is to copy it from another source and then paste it." The "Add selected text to library list" button is still present at the bottom right.

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10. Once you've added in the text for your agreement, click on 'OK' in the top right corner.



11. Your inspection agreement has now been added in. By going to Tools->Save as Template you can create a new version of your template that includes the inspection agreement that was just 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.