



How To:

Copy and Paste Categories Between Templates

This step by step How To article explains how to copy and paste categories between templates.

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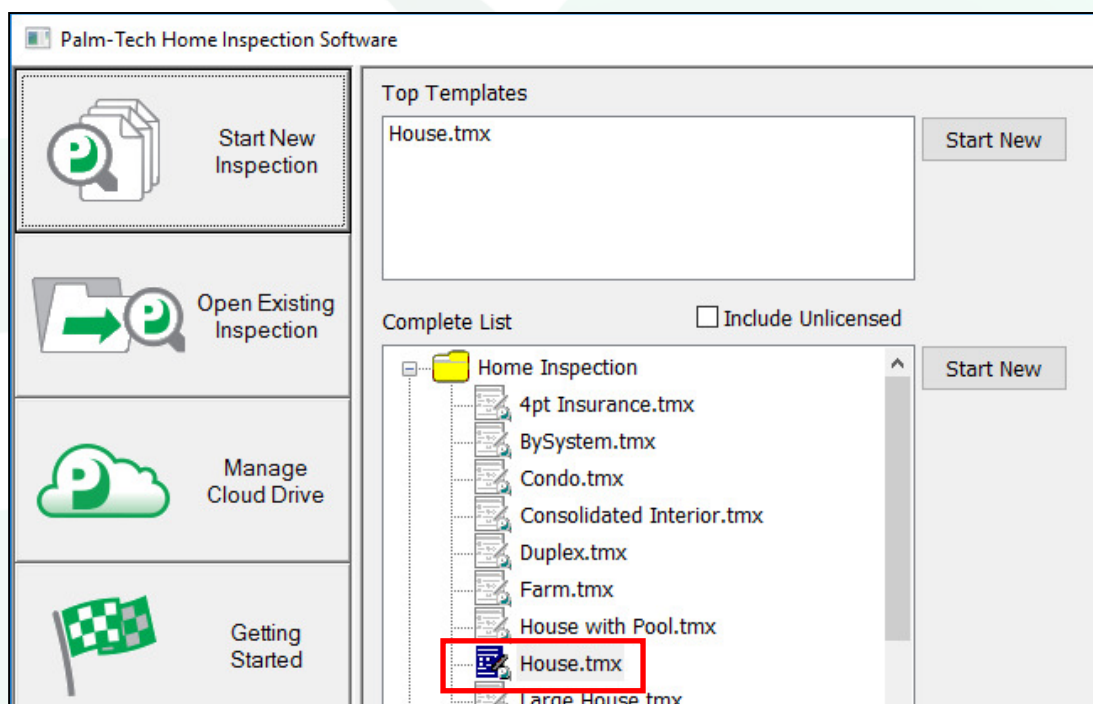
How To: COPY AND PASTE CATEGORIES BETWEEN TEMPLATES

There may come a time when you are working on a template/inspection that you want to add a category into, that you have in a different template/inspection. You can do this by copying the category from the original source and pasting it to the new template/inspection.

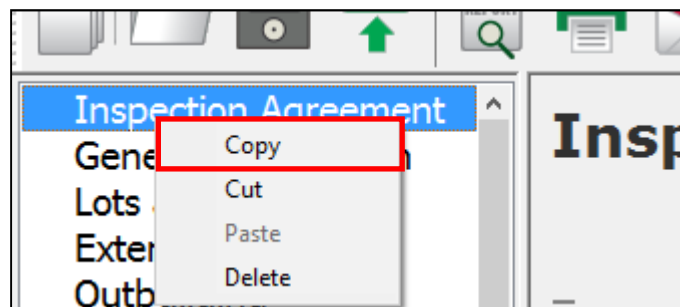
NOTE: For Copy and Paste to work in Palm-Tech (for categories), you must have only one inspection open at a time.

For this HOW TO we will be using the example of copying an Inspection Agreement category from the 'House' template and pasting it in the 'Condo' template.

1. The first step is to start a new inspection with the template you want to copy the category from. For our example, this will be the 'House' template.

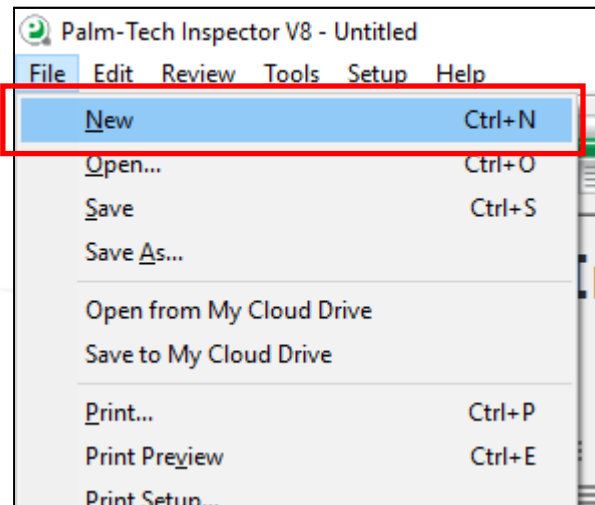


2. When the program prompts you to give the inspection file a name you can skip past it by clicking on 'Cancel'.
3. Next, right click on the category you want to copy and click on 'Copy'.

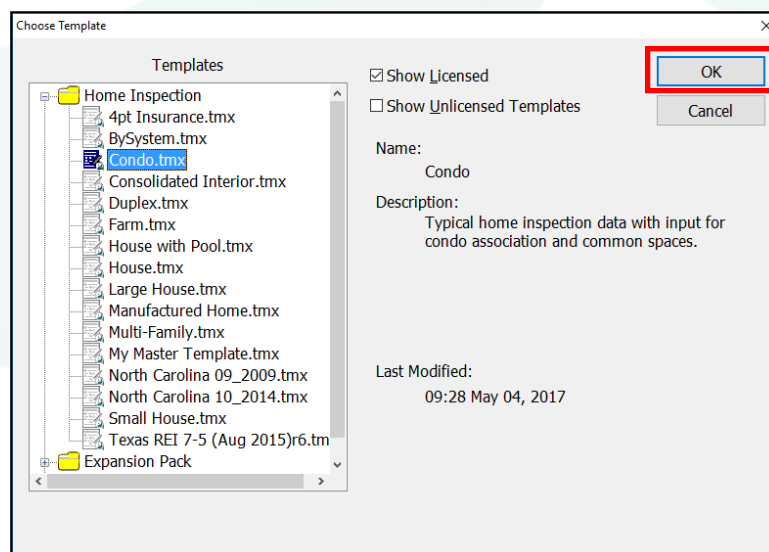


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- Now that the category is copied, we need to open the template/inspection that we want to paste it into. In this example, this will be the 'Condo' template. To do this, we'll go to File->New.



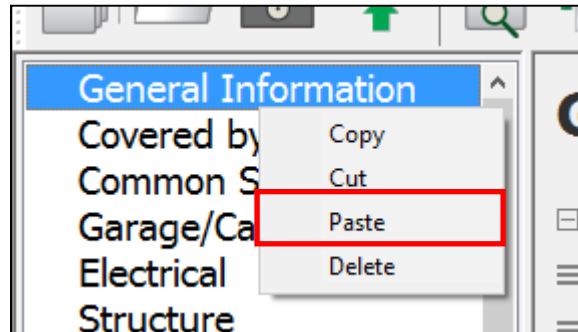
- Next the program will ask if you want to save changes to the open inspection file. Click on 'No'.
- Now we need to select the template we want to paste the category into and start a new inspection. For this example this will be the 'Condo' template. Click 'OK' to continue.



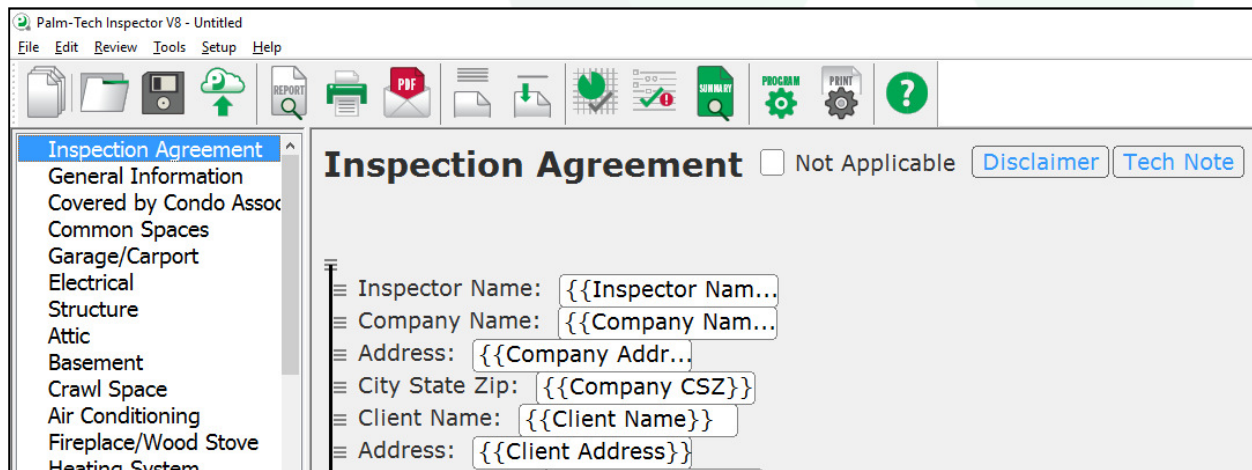
- When the program prompts you to give the inspection file a name you can skip past it by clicking on 'Cancel' unless you want to give the file a name.

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8. Now, right click somewhere in the category list on the left and click on 'Paste'.



9. The category will now be added in. If you want to move the category to someplace else in your list, simply click on the category and drag it where you want it.



10. If you want to make the 'Inspection Agreement' category a permanent part of your Condo template you can do this by going to Tools->Save as Template. From here you will walk through a few screens where you can give the modified template a new name.