



How To:

Save an Inspection as a Template

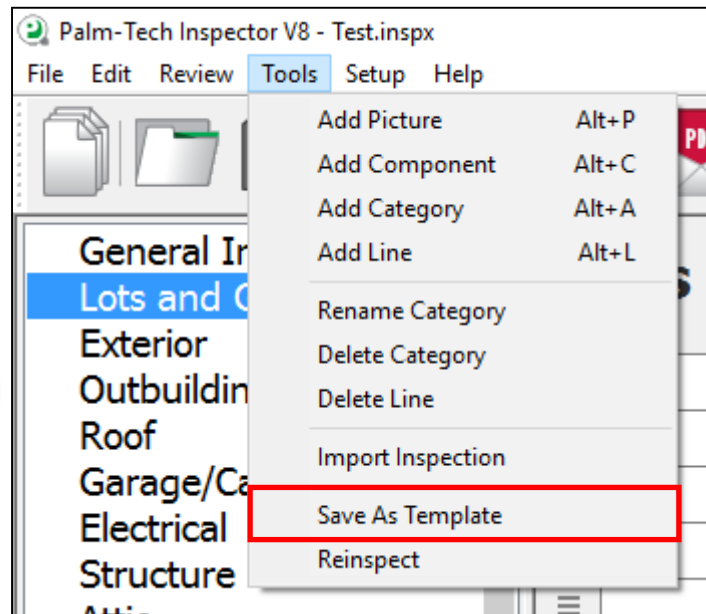
This step by step How To article explains how to save an inspection as a new template

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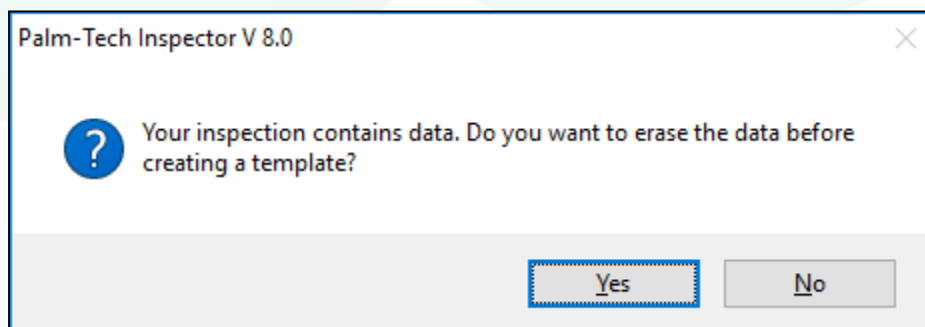
How To: SAVE AN INSPECTION AS A TEMPLATE

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.

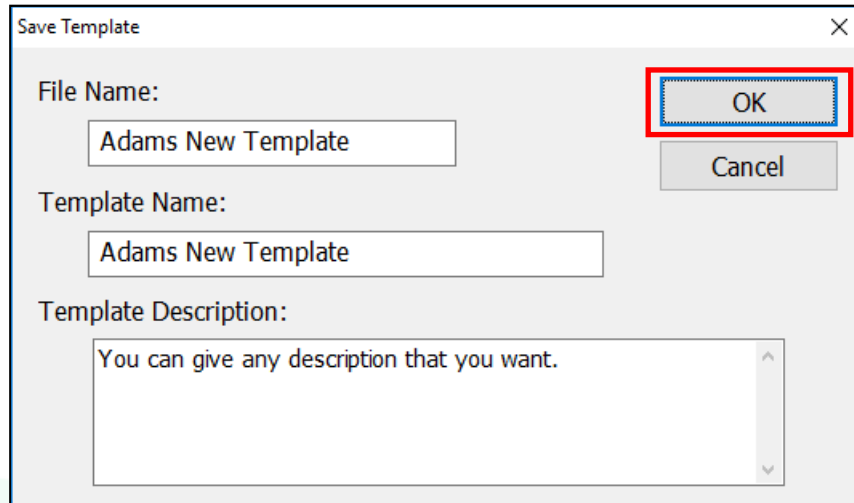


2. This will bring up a screen that says the inspection contains data and asks if you want to erase the data before creating a template. If you have entered data such as ratings, descriptions, notes, or info in the General Information that you want to keep as part of your template, click on 'No'. If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

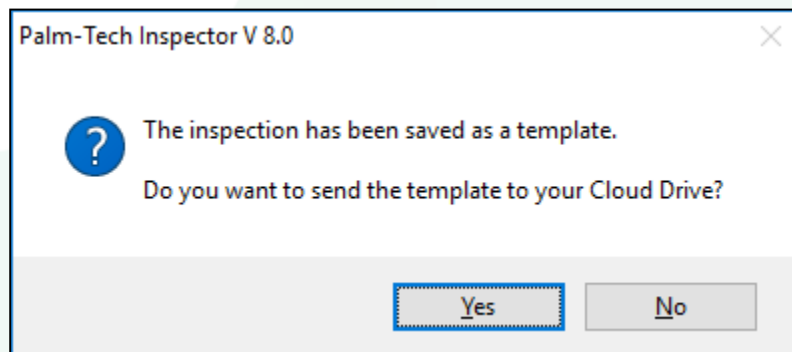


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- Next the 'Save Template' window appears. Here you give your template a 'File Name', 'Template Name', and a 'Template Description'. Once you have finished entering the information, click on 'OK'.



- 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.