Palm-Tech
home inspection software

How To:

Work with the Main Palm-Tech Files

This How To article explains what the main Palm-Tech files are and how they work.

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HOW TO: WORK WITH THE MAIN PALM-TECH FILES

This document goes over the main Palm-Tech files that you'll be working with. These files include: Templates, Libraries, Inspection files, Print Settings and PDF files. These are all separate files, but work together.

> **A. Templates**
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> **B. Libraries**
>
> **C. Inspection files**
>
> **D. Print Settings**
>
> **F. PDF files**

A. Templates

1. Template files contain the 'structure' of a template which includes items such as your categories and all of the lines within the category. They are the .tmx files.

2. You create Templates in order to have the same layout each time you start an inspection.

3. When creating a new Template you begin by starting a new inspection file. The easiest thing to do is keep working from the same inspection file until you have the template setup the way you want. Once you have it setup, go up to **Tools>Save as Template** to create your template.

4. You can only create Templates on the PC, but after you create one you can send it through the cloud and use it on a mobile device.

B. Libraries

1. Libraries contain your Ratings, Disclaimers, and Dropdowns.

2. The Library is separate from the Template. All the basic home inspection templates use the same library called Default.ptlix.

3. If you make changes to your Ratings, Disclaimer, and/or Dropdowns you will need to send your Library through the Cloud to see those changes on other devices. (**Note: If you only make changes to the Dropdowns, Ratings, and/or Disclaimers you do not have to make a new Template for the changes to be permanent.**)

C. Inspection Files

1. Inspection files are the files that get created each time you start and save a new inspection. These are the .inspx files.

2. When you start an inspection you will be prompted to give it a file name. You can name it whatever you want, however, make sure you give it a name that will be easy for you to know what property the inspection file was done on.

3. When starting new inspections it works best to use the 'Start New' process each time instead of resaving the same inspection file over and over again.

D. Print Settings

1. The Print Settings file includes the various settings that impact how the reports you create look. This includes items such as: adding a Cover page, moving the summary to the beginning of the report, adding your company logo, etc.

2. Print Settings can only be changed on the PC. If you email PDFs of the report from a mobile device, you will want to make sure you send your Print Settings to the Cloud. When you close out of Print Settings on the PC, it will ask you if you want to send your settings to the Cloud Drive, click 'Yes' to do this.

F. PDF files

1. When have completed your inspection you will create a PDF of the report to send to your clients.

2. If you are on the app and have a valid internet connection you can email the PDF to yourself to review and then forward it on to your clients.

3. If you are on the PC make sure you send out the PDF file to your clients and not the actual inspection file.