

You can add a line to any category or component in the inspection by selecting **Tools**→**Add Line** from the menu or clicking the **Add Line** button on the toolbar. The Add Line window appears where you can choose what **Type** of you line you want to add, as well as where you want the line to appear in the category. The types include:

- 1 Question/Answer
- 2 Question/Answer
- 3 Question/Answer
- Text
- Yes/No
- Checkboxes
- Option List
- Standalone Note
- Signature Line
- Page Break

In the following pages we will show you examples of each of these types, how to add them, and how they would look on the input screen as well as the printed report.

You can mix and match the different line types too create a uniquely customized report that reflects your methodology and style.

When you add lines to your inspection, the change is made for that inspection. To make changes permanent, select **Tools -> Save as Template** from the menu and the program will create a new template with the changes you made that you can use to start new inspections with in the future.

# How To: Add Lines to your Report

## 1 Question/Answer

This is the most commonly used type of line in the default Palm-Tech templates. The 1 Question/Answer line provides you with the option for a rating, a prompt to identify the inspection point, an entry for a description and the option for a note.

A rating and note can also be added to the line by checking the options for "Show Rating" and "Show Note" checkboxes in the lower left corner.

### Add Line Window:

The 'Add Line' window shows the following configuration:

- Type: 1 Question/Answer
- Screen Prompt: 1: Fountain:
- Print Prompt (only if different from screen):
- Insert at Top:
- Insert list: Lawn Sprinklers: (selected)
- Show Rating:
- Show Note:
- Buttons: OK, Cancel

### Input Screen View:

18.	Marginal	Fountain:	Concrete	There is so...
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### Printout View:

18.      Fountain: Concrete There is some pooling of water next to the

# How To: Add Lines to your Report

## 2 Questions/Answers

2 Questions/Answers line places 2 question/answer pieces on the same line.

A rating and note can also be added to the line by checking the options for "Show Rating" and "Show Note" checkboxes in the lower left corner.

### Add Line Window:

The 'Add Line' dialog box contains the following elements:

- Type: 2 Questions/Answers
- Screen Prompt: 1: Permits obtained
- Print Prompt (only if different from screen):
- 2: How verified?
- Insert list: Conditions, Decorative Line, Others Present, Estimated Age, Inspection Date, Start Time, Electric On, Gas/Oil On, Water On, Temperature, Weather, Space Below Grade, Building Type, Sewage Disposal, Water Source, **Additions/Modifications**, Permits Obtained
- Checkboxes:  Show Rating,  Show Note
- Buttons: OK, Cancel

### Input Screen View:

The input screen view displays the following items:

- Permits Obtained
- Building
- How Verified
- Visual Inspection

### Printout View:

Permits Obtained Building How Verified Visual Inspection

# How To: Add Lines to your Report

## 3 Questions/Answers

3 Questions/Answers line places 3 question/answer pieces on the same line.

Add Line Window:

The 'Add Line' dialog box contains the following elements:

- Type:** 3 Questions/Answers
- Insert at Top:**
- Screen Prompt:**
  - 1: City
  - 2: State
  - 3: Zip
- Print Prompt (only if different from screen):** Three empty text boxes.
- Insert List:** Decorative Line, Others Present, Estimated Age, Inspection Date, Start Time, Electric On, Gas/Oil On, Water On, Temperature, Weather, Space Below Grade, Building Type, Sewage Disposal, Water Source, Additions/Modifications, **Permits Obtained**, Page Break.
- Buttons:** OK, Cancel.

Input Screen View:

The input screen view shows three dropdown menus:

- City
- State
- Zip

Printout View:

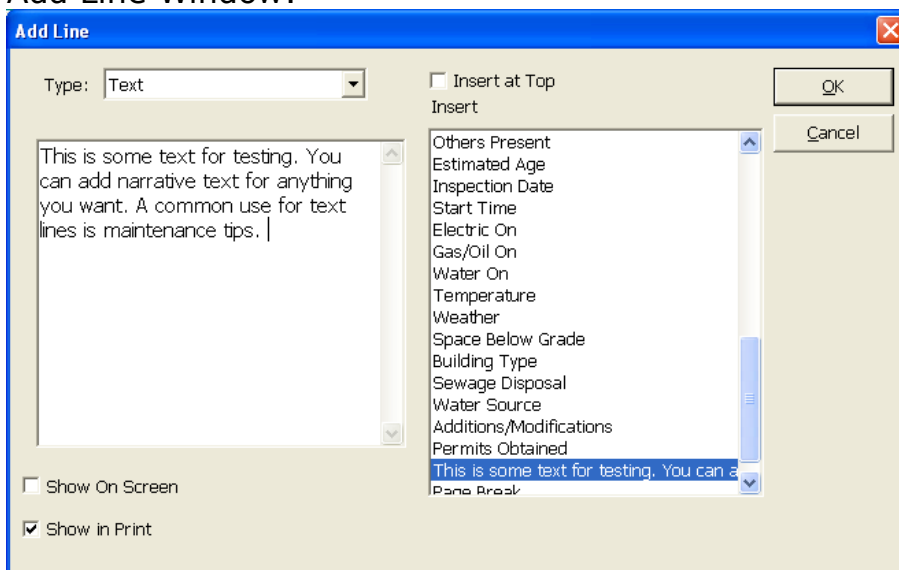
City Dayton State Ohio Zip 47257

## Text


The text option allows you to add a block of text to your report. You can copy and paste text from other documents. When you add text, it will appear on your input screen just as you added it.

Note the "Show On Screen" and "Show in Print" options in the lower left corner of the Add Line Window. By default the "Show on Screen" option is not checked. This helps to eliminate clutter in the input screen. If you want to edit the text after it is in the report, you will need to check the "Show on Screen" box

### Add Line Window:



### Input Screen View:

 This is some text for testing. You can add narrative text for anything you want. A common use for text lines is maintenance tips.

### Printout View:

This is some text for testing. You can add narrative text for anything you want. A common use for text lines is maintenance tips.

# How To: Add Lines to your Report

## Yes/No

The Yes/No line allows you to add a prompt followed by the options of Yes and No.

A rating and note can also be added to the line by checking the options for "Show Rating" and "Show Note" checkboxes in the lower left corner.

### Add Line Window:

The screenshot shows the 'Add Line' dialog box with the following details:

- Type:** Yes/No
- Screen Prompt:** ew Construction
- Print Prompt (only if different from screen):** (empty)
- Insert List:** Driveway shows, Number of Exterior Outlets, Signature (selected)
- Show Rating:**
- Show Note:**
- Buttons:** OK, Cancel

### Input Screen View:

The screenshot shows the input screen view with the following details:

- Radio Buttons:**  New Construction?  Yes  No
- Button:** <Note>

### Printout View:

The screenshot shows the printout view with the following details:

- Text:** New Construction
- Radio Buttons:**  Yes  No

## Checkboxes

Checkboxes are used if you want the ability to select items from a list with a single click.

Checkboxes are confused at times with options lists (next page). The difference between checkboxes and options lists is that checkboxes allow you to make multiple selections from the list while options lists only allow you to choose one item from the list.

A rating and note can also be added to the line by checking the options for "Show Rating" and "Show Note" checkboxes in the lower left corner.

### Add Line Window:

The 'Add Line' dialog box contains the following elements:

- Type: Checkboxes
- Screen Prompt: Driveway shows
- Print Prompt (only if different from screen):
- Checkbox Items:
  - 1: Pitting
  - 2: Cracking
  - 3: Stains
  - 4: Holes
  - 5: Grass
- Show Rating:
- Show Note:
- Insert at Top:
- Buttons: OK, Cancel

### Input Screen View:

Input Screen View:  Driveway shows  Pitting  Cracking  Stains  Holes  Grass

### Printout View:

1. Driveway Shows  Pitting  Cracking  Stains  Holes  Grass

## Option List

The option list allows you to choose a single item from a list of possible choices. This works similarly to the checkbox (previous page) except that the option list allows you to choose only one of the options shown.

The option list line type allows a rating and note to be added by checking the box(es) in the lower left.

### Add Line Window:

The 'Add Line' window contains the following elements:

- Type: Option List
- Screen Prompt: f Exterior Outlets
- Print Prompt (only if different from screen): Driveway shows
- Option Items:
  - 1: [ ]
  - 2: [ ]
  - 3: [ ]
  - 4: [ ]
  - 5: [ ]
- Show Rating:
- Show Note:
- Buttons: OK, Cancel

### Input Screen View:

Number of Exterior Outlets  1  2  3  4  5 <Note> \$

### Printout View:

13. Number of Exterior Outlets  1  2  3  4  5

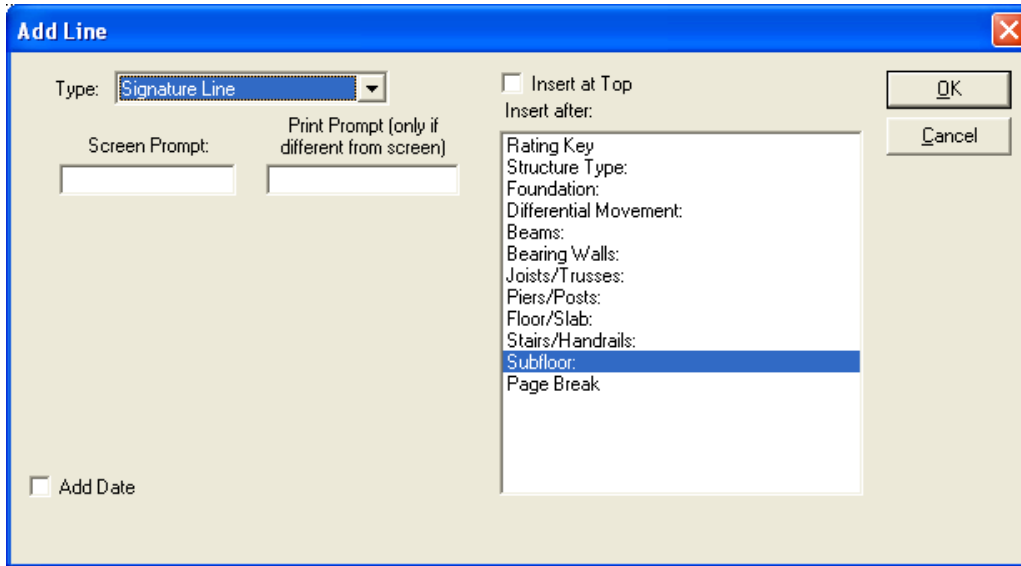
# How To: Add Lines to your Report

## Signature Line

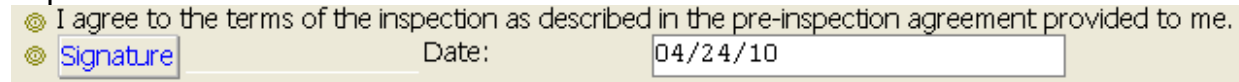
The electronic signature line allows you or your client to electronically sign a report on a tablet, Pocket PC, or any other computer with a touch screen.

You can add a date to the signature line by checking the box for signature in the lower left.

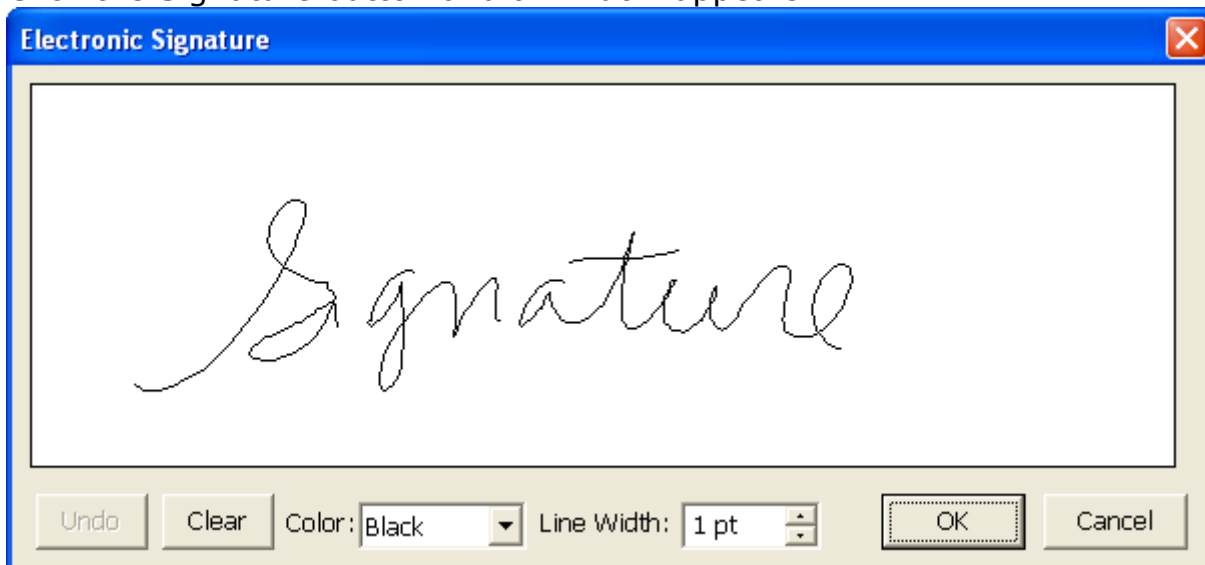
Add Line Window:



Input Screen View:



Click the Signature button and a window appears:



## How To: Add Lines to your Report

The program records the signature and informs you on the screen that it has been received:

I agree to the terms of the inspection as described in the pre-inspection agreement provided to me.  
 **Signature** **Signature Received** Date:

### Printout View:

I agree to the terms of the inspection as described in the pre-inspection agreement provided to me.

*Signature*

Date: 04/24/10

**NOTE:** In this example, we also added a Text line (see page 5) to the report to indicate what the signature was indicating.

## How To: Add Lines to your Report

### Standalone Note

A standalone note lets you display additional information about an item. The main differences between a standalone note and a Question/Answer are:

1. Notes can be up to 32,000 characters long.
2. Notes use a separate window for text entry.
3. Notes allow you the option to specify a different font and color.

You can add the option for a rating to a Note line by checking the box in the lower left corner.

### Add Line Window:

The 'Add Line' dialog box contains the following elements:

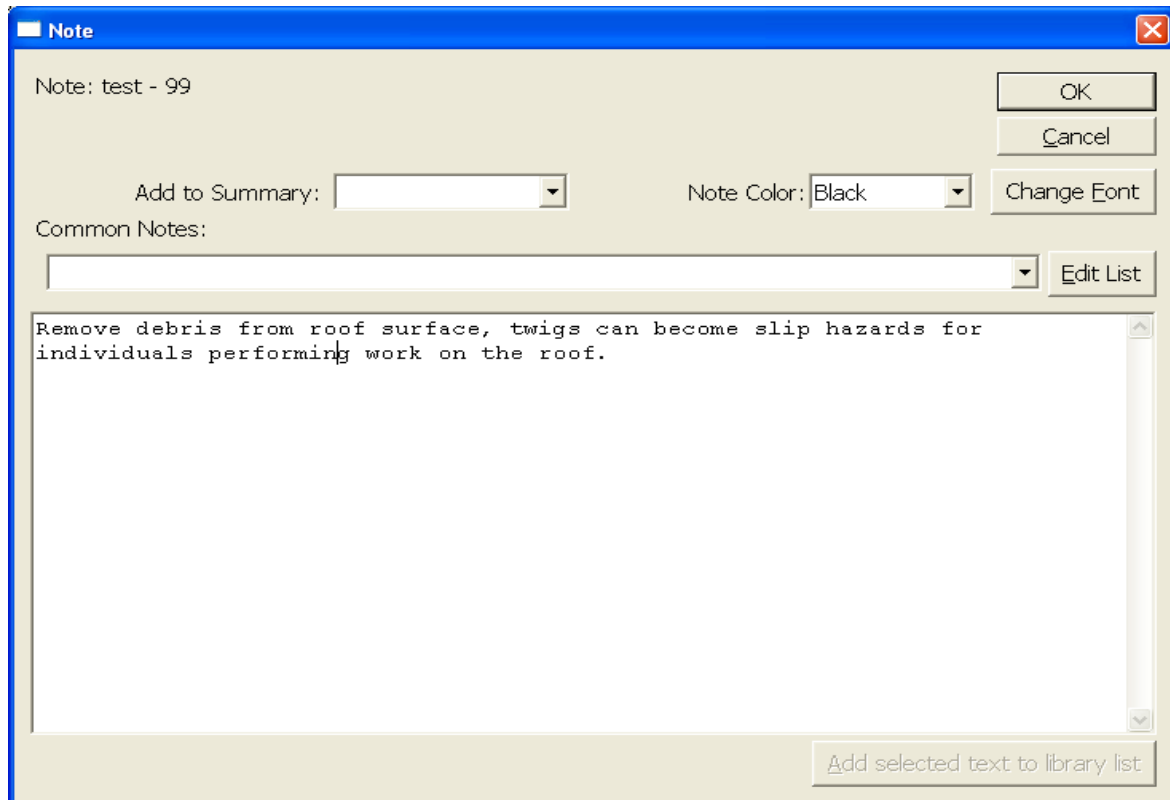
- Type:** A dropdown menu currently showing 'Standalone Note'.
- Screen Prompt:** An empty text input field.
- Print Prompt (only if different from screen):** An empty text input field.
- Insert at Top:** A checkbox that is currently unchecked.
- Insert:** A list box containing the following items: Walks:, Steps/Stoops:, Porch:, Patio:, Deck:, Balcony:, Grading:, Swale:, Vegetation:, Window Wells:, Retaining Walls:, Basement Stairwell:, Basement Stairwell Drain:, Exterior Surface Drain:, Fences:, Lawn Sprinklers: (highlighted), and Pane Break.
- Show Rating:** A checkbox in the bottom left corner that is currently unchecked.
- Buttons:** 'OK' and 'Cancel' buttons in the top right corner.

### Input Screen View:

<Note>

## How To: Add Lines to your Report

Click the Note button and a window appears:



NOTE: In the Note window, there is an option in the upper left to add the text from the note to a summary if the line does not have a rating on it.

Printout View:

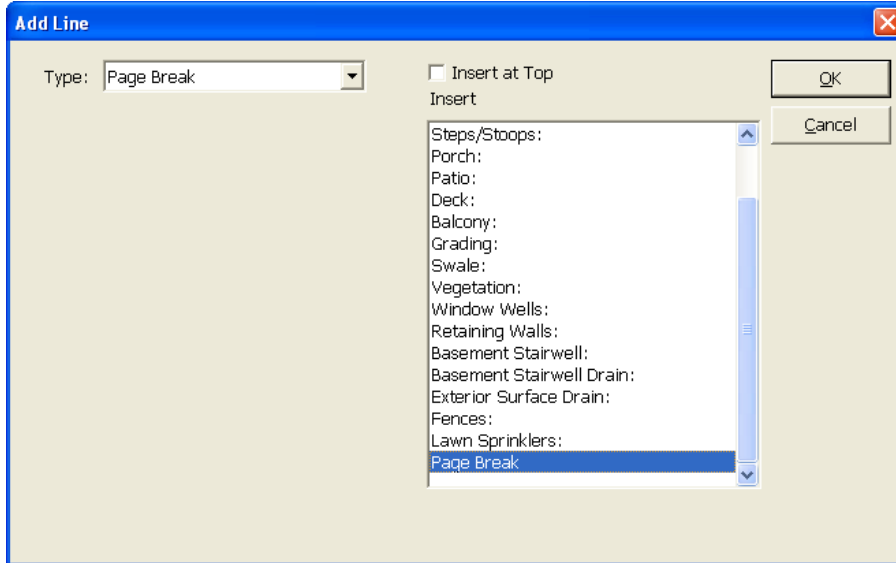
Remove debris from roof surface, twigs can become slip hazards for individuals performing work on the roof.

## Page Break

The page break option allows you to force a new page to start in the printed report. Add the page break line where you want a new page to begin.

Page breaks are not shown on the input screen.

Add Line Window:



**NOTE:** The default templates in the program already contain **conditional page breaks** at the end of each category. The conditional page break will start a new page only if the page break line is encountered when printing is more than 60% of the way down a page.

## How To: Add Lines to your Report

The add line option is included so that you can customize your templates and reports to the way that you prefer to inspect.

If you would like more control over the way the report prints than the add line option offers or if you would like to mix and match different elements together (for example you might want to add check boxes to a question/answer line), Inspection Designer gives even more control over the elements and printed report.

If you have any other questions or would like additional help you can call us at 1-888-736-2462 or send an e-mail to: [support@pdmb.com](mailto:support@pdmb.com).