

Palm-Tech Inspector gives you 4 different styles to choose from when adding a cover page to your report. However, you also have the ability to create your own custom cover page using Designer. Designer is an add-on that gives you full control when creating new templates.

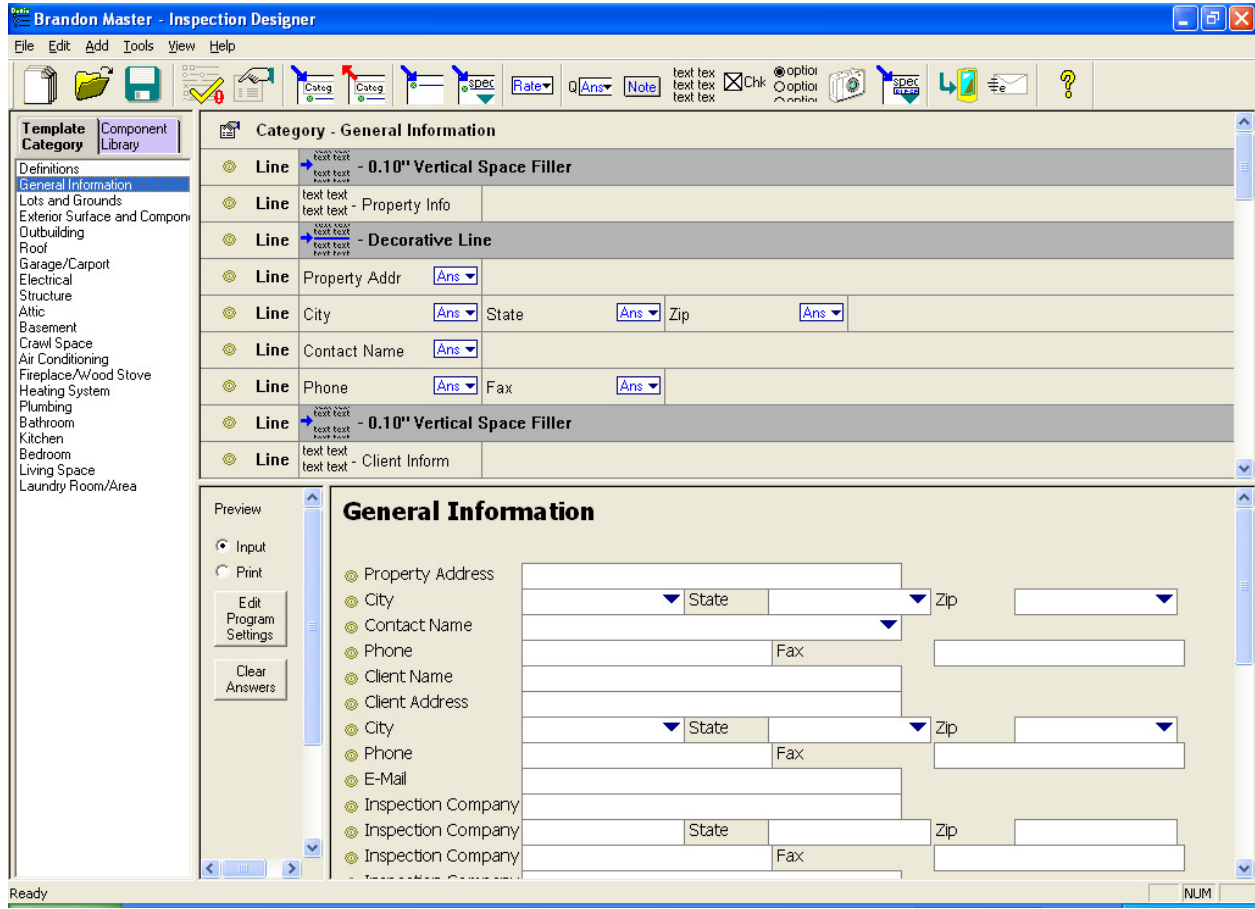
This document is going to walk you through the basics of creating a custom cover page and some of the options available. Designer is an in depth program, with lots of options, many of which will not be covered in this guide. The first part of this guide is going to show the steps necessary to create a custom cover page. The second part of the guide is going to walk through some of the options available to customize your cover page.

If you have specific questions about what you can and can not do with Designer regarding your custom cover page, feel free to send us an email (support@palm-tech.com) or give us a call at (888)736-2462.

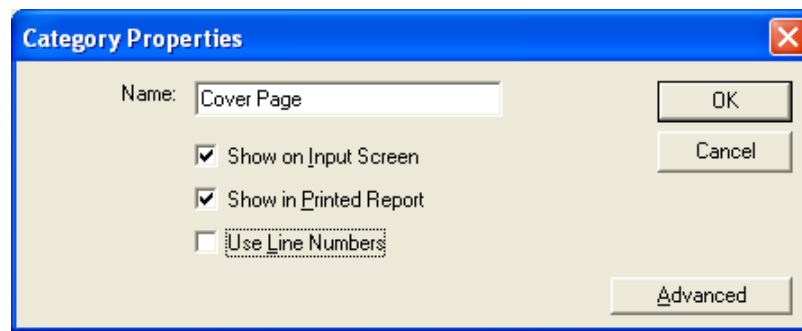
How to: Create a Custom Cover Page in Designer

Creating a Custom Cover Page in Designer – Part I

1. First, open Designer and click on File > Open. Select the template that you want to add your cover page to.

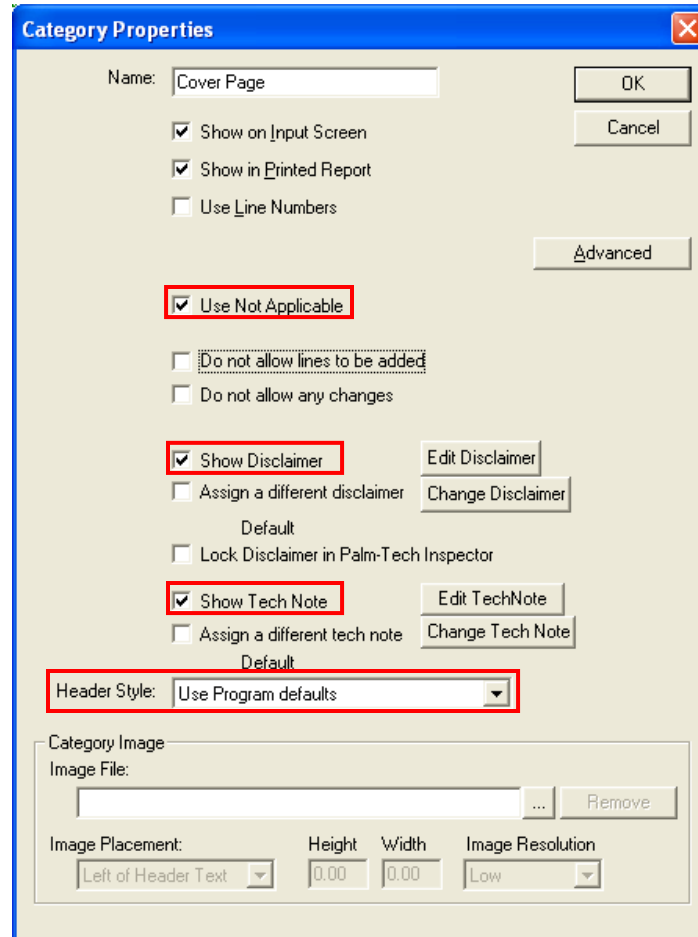


2. Next, click on the Add Category icon in the menu or go to Add > Category. Name the category "Cover Page" exactly as it looks here. Also, uncheck the 'Use Line Numbers' box. We are going to click Advanced to edit a few more properties.



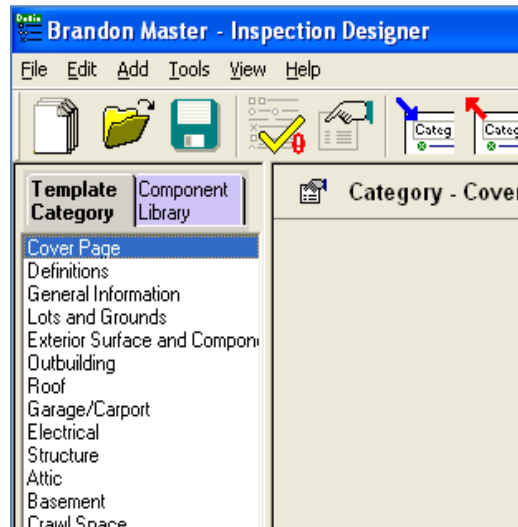
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3. Because this is a cover page we are adding, and not a regular inspection category, we will want to uncheck 'Use Not Applicable', 'Show Disclaimer', and 'Show Tech Note'. Under Header Style, select 'None'. Click OK to continue.



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4. Designer will add your new Cover Page category to the bottom of the category list. Click and drag the category to the top of the category list.

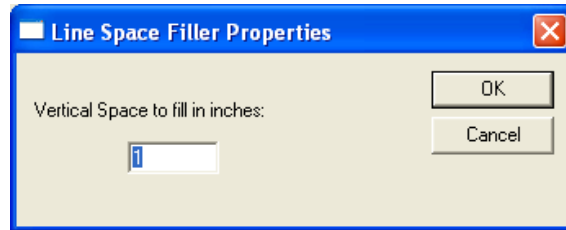


5. Now that the cover page category is added, you can build the cover page using Designer tools to look however you want. The rest of the How To guide is going to walk through the process of creating a basic cover page. You may decide you want to follow some of the same steps for your cover page, or decide to go a completely different route with how it looks.

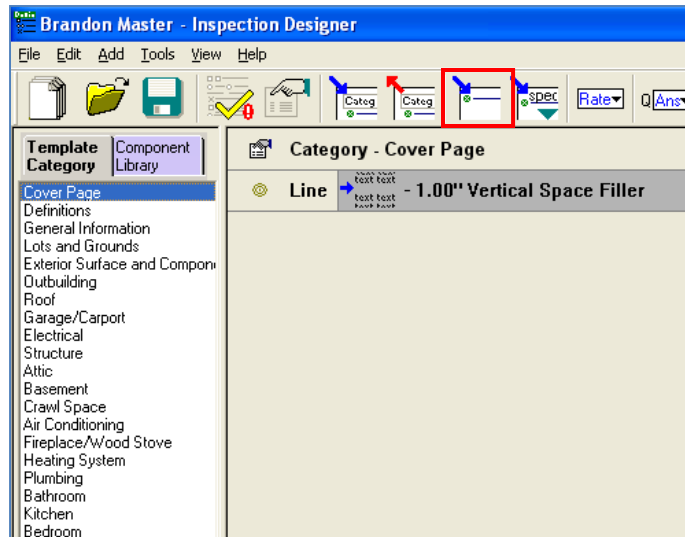
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Creating a Custom Cover Page in Designer – Part II

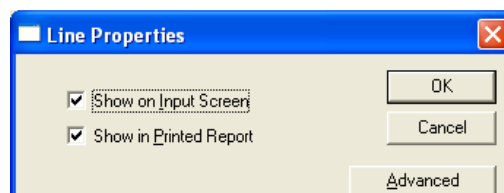
1. The first item we are going to add is a vertical space filler of 1 inch. This will move your title down so that it is not at the very top of your page. To do this we will add a new line by going to Add > Line > Vertical Space Filler and typing in 1.



2. Next we are going to add a title to your cover page. The title is completely up to you, but for this How To we are going to use 'Home Inspection Report'. To do this we need to add in an empty line by clicking on the 'Add New Line' icon.

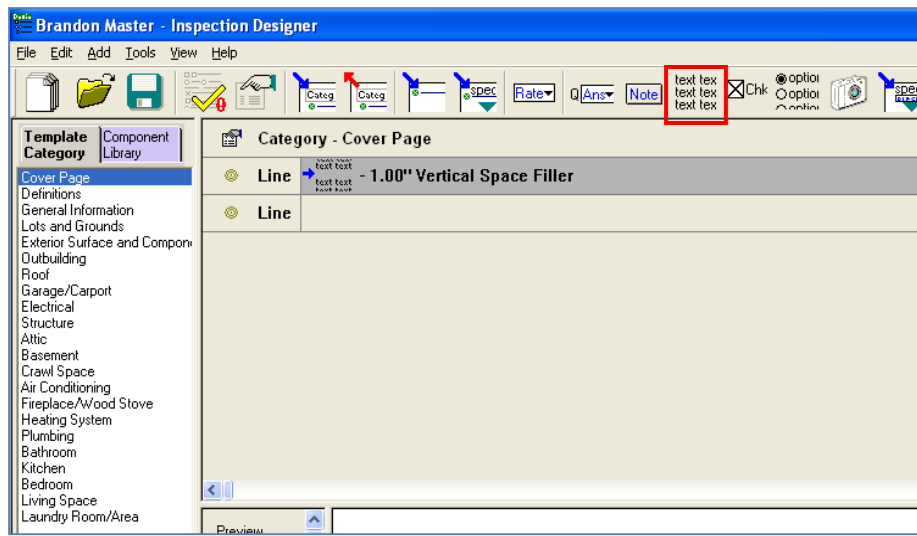


3. A Line Properties box will pop up where you can change the properties of the line. We want the title to show up on both the input screen and the printed report, so we are going to leave both of these checked. Click OK.

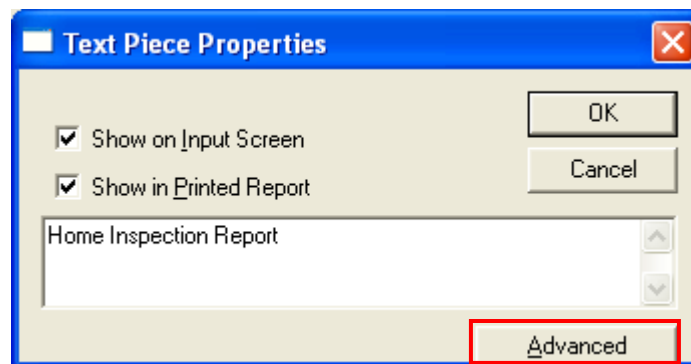


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- Now that we have a blank line, we are going to add a Text Block so we can add our title. You can do this by clicking the icon or clicking on Add > Element > Text Block.

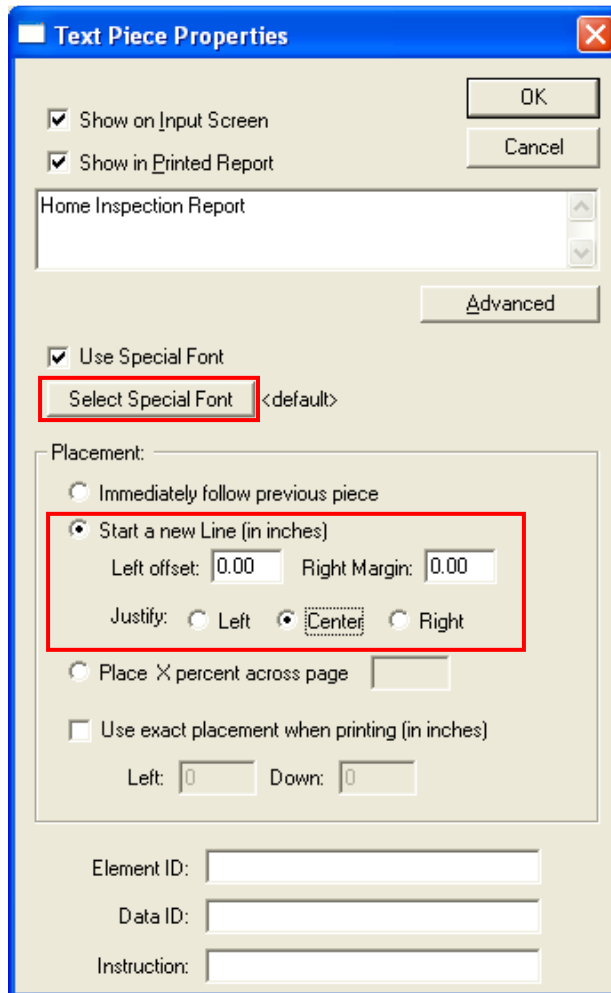


- The text box will pop up next. Here you can type in the text that you want for your title. When you are finished click 'Advanced' for more options.

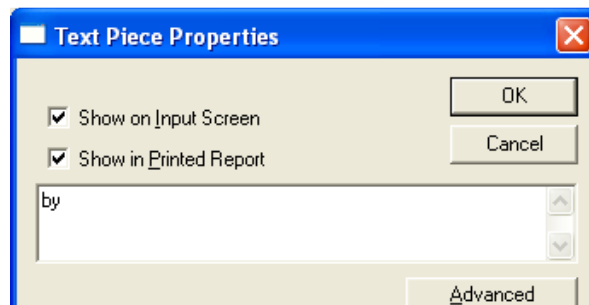


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- Once you are finished typing the title of your report, click on Advanced for more options. Here you can change the font, font size, and other features of the font by clicking on 'Select Special Font'. You will also want to check the box 'Start a new Line' and select 'Center' so that your title will be on it's own line and centered on your page. When you are finished click OK.

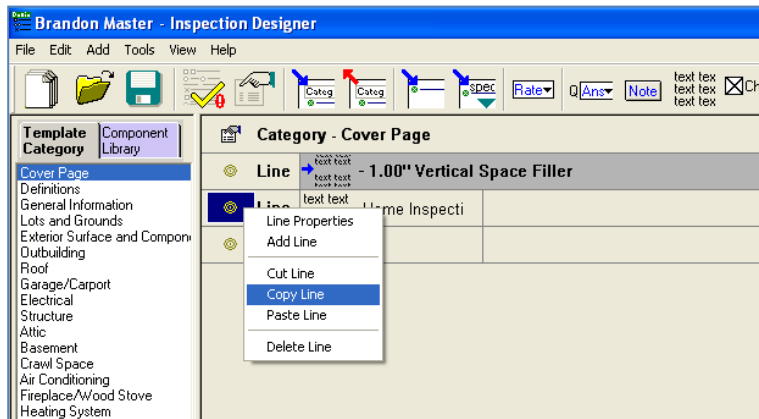


- We are going to do the exact same thing to add in our next line of text. We are going to add a new empty line, add a text block, and then type in the word 'by'. Once we click on Advanced and set up our line how we want it, click OK.

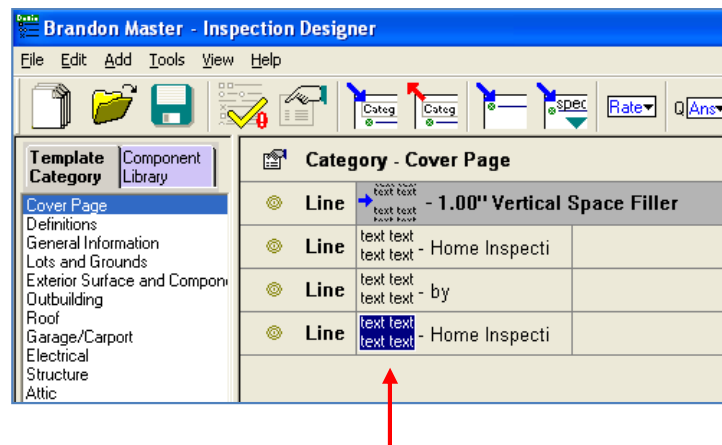


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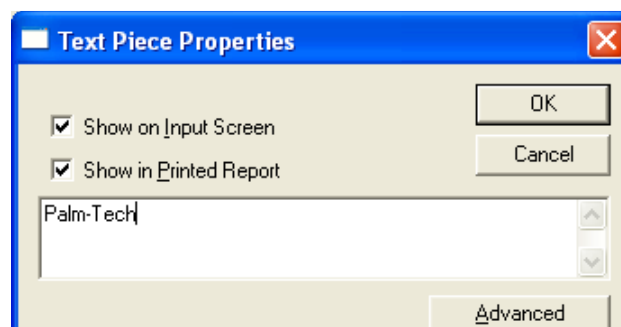
8. Next we are going to add in another line using the same methodology. **NOTE:** Since the line you are adding is going to be the same as a previous line, only with different text entered, you can just copy and paste the previous line. To do this, right click on the yellow circle and click 'Copy' and then right click below your last line and click 'Paste'.



9. Once the line is pasted, all you need to do is change the wording of the text. To do this, just click on the Text Box in your line.

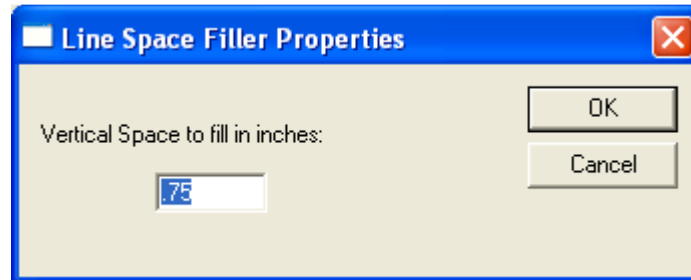


10. Then type in the desired text into the Text Box and click OK. This is where we can put the inspection company name, so for this How To we are going to type Palm-Tech

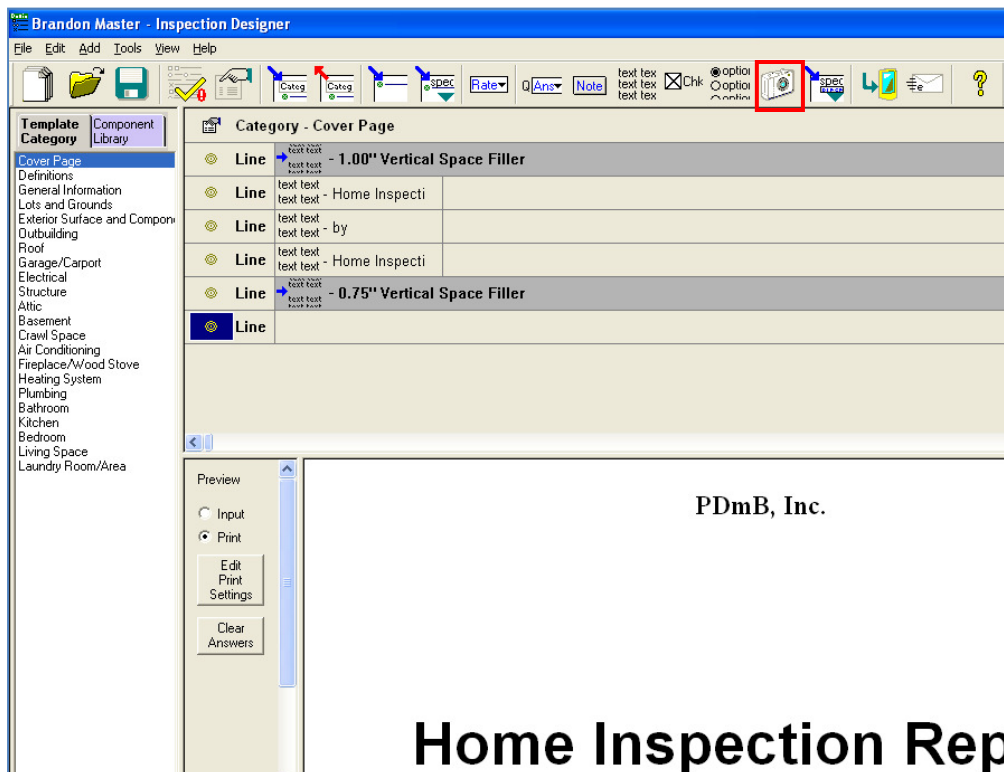


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11. Now that we are finished with the title of the report, we want to add a picture of the home we are inspecting. We want this picture to show up in the middle of the page so we are going to insert a Vertical Space Filler to move the picture down a little bit. You can add this to your line by clicking on Add > Line > Vertical Space Filler. For this How To we are going to use a .75 inch filler.

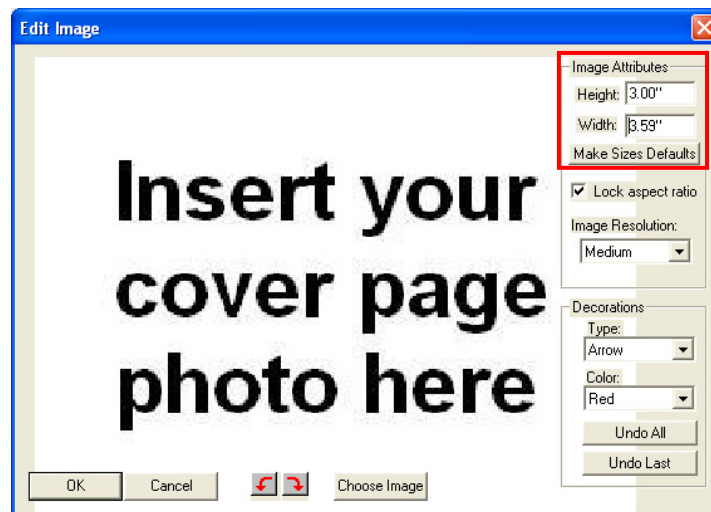


12. Since the picture is going to change with each report you do, we are going to add a picture place holder. For this How To, we are going to use one that was created in Paint (if you create one yourself in Paint, make sure to save it as a JPEG). To add this picture, add a new line and click on the Add Image icon.

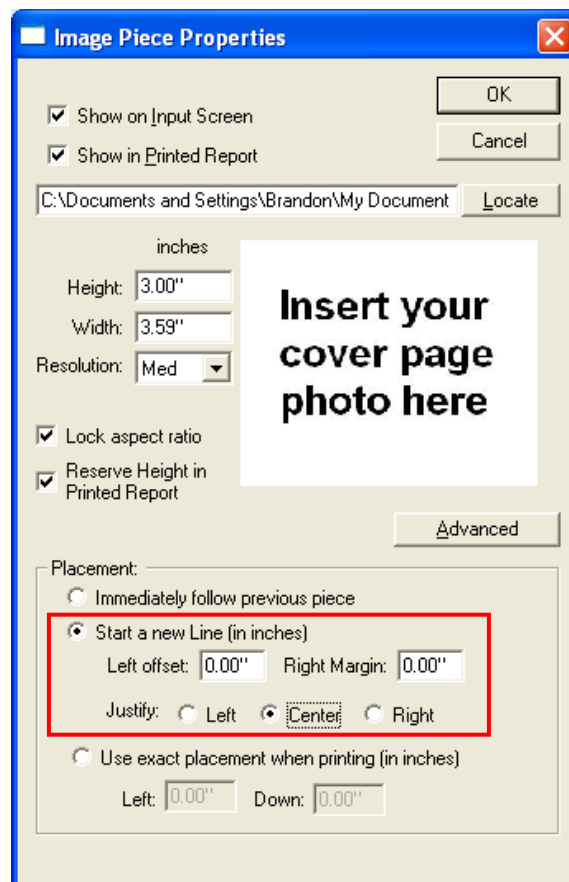


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13. Select your image from the Select Image box and click OK. An Edit Image box will pop up where you can edit the size of the picture. For this example we are going to make the picture 3" x 3.59". When you're finished, click OK.

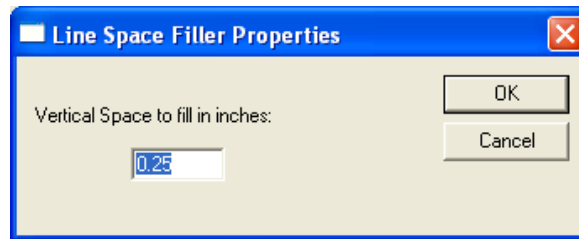


14. The next box that pops up allows you to edit your image properties. Click Advanced to make changes to your image. We are going to click on 'Start a New Line' and then choose 'Center'.

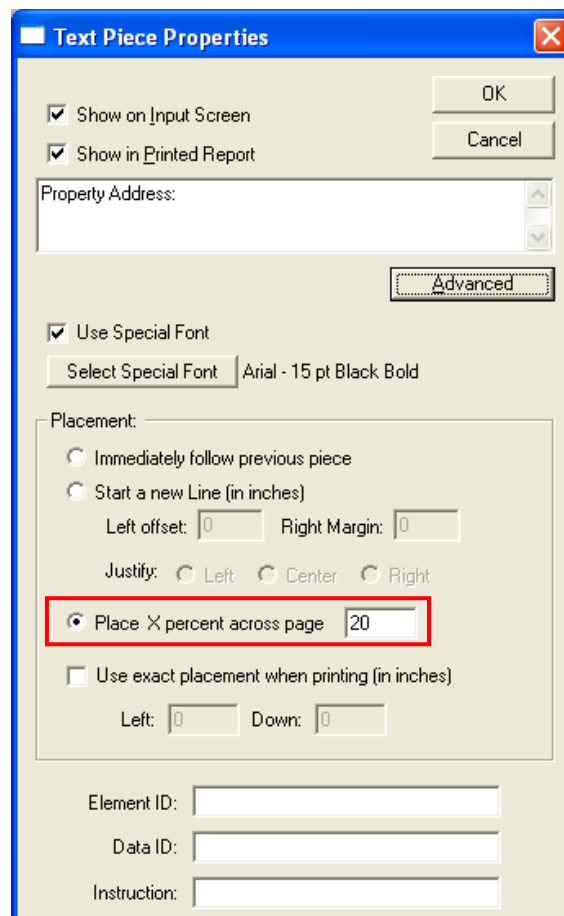


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15. Next we are going to add another new line and another Vertical Space Filler, to space things out a little bit. This time I am going to use .25 inch for the filler.

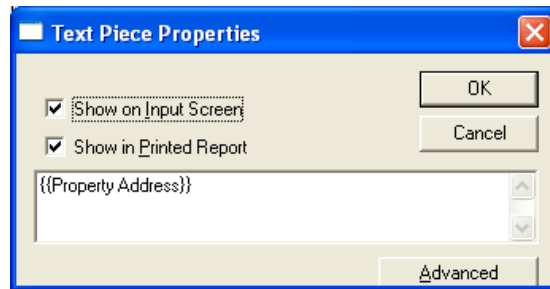


16. Next we are going to add the property address to the cover page. To do this add a new line and then add a Text Block to it. In the text box, type 'Property Address:'. Edit the font and font size to your preference. Under Placement in Advanced Options, we are going to select 'Place X percent across page' and input '20'. This will mean that the text entered on the line will start 20% across the screen.

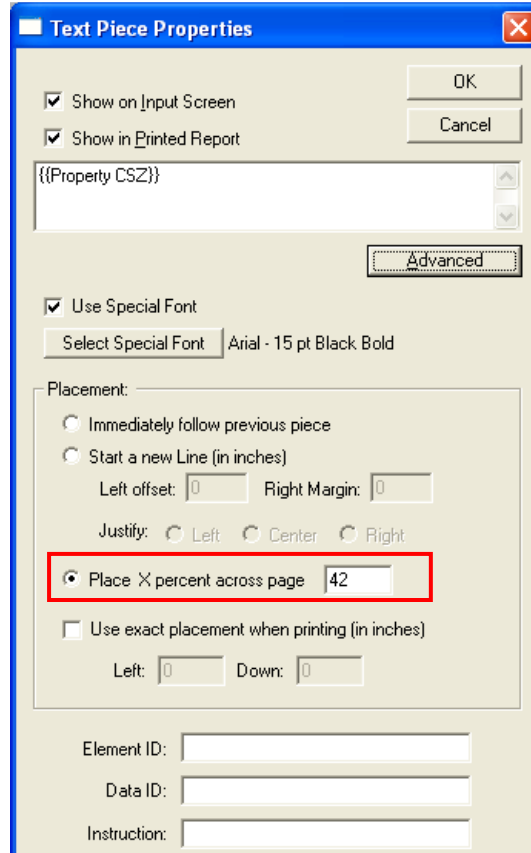


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17. On the same line we are going to add another Text Block. In this one we are going to use the merge field for property address, which is `{{Property Address}}`, exactly as it appears here including the brackets. This will automatically pull the property address from the General Information page. For the Placement, we are going to leave it at 'Immediately follow previous piece'. For a list of available Merge Fields, and more information about creating your own, check out the Merge Field document here: http://palm-tech.com/support/howto/085_How%20to%20Use%20Merge%20Fields.pdf

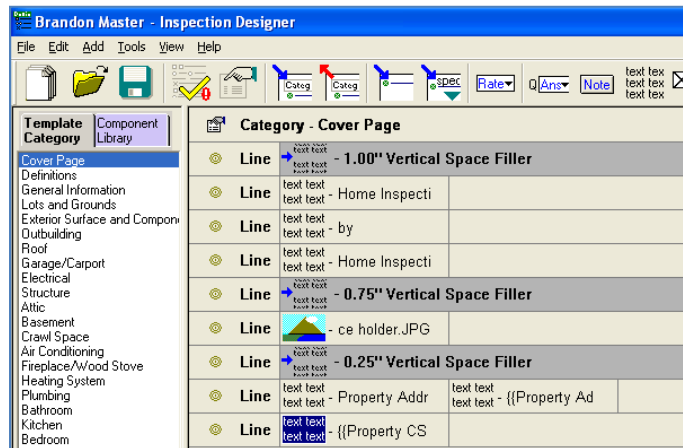


18. We are going to add a new line and insert another Text Block. In this text box we are going to use the merge field for the city, state, and zip of the property, which is `{{Property CSZ}}`. For the Placement, we are going to choose 'Place X percent across page' and input 42.

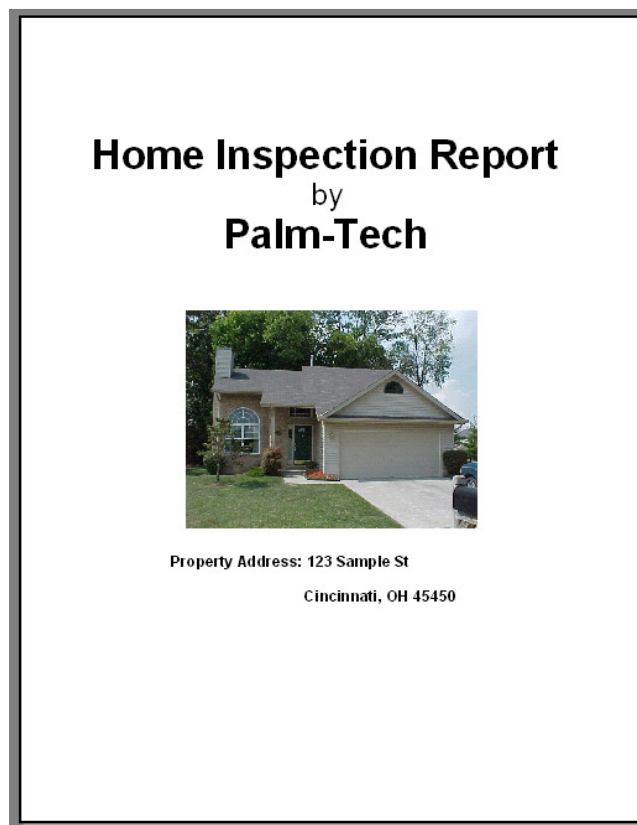


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19. At this point, your Cover Page should look similar to this in Designer.



20. By following the steps above, we have created a cover page that will look like this:



21. As mentioned earlier, this is a simple example to show you some of the basics about how Designer works. You can add in other information such as the date, client name, inspector name, affiliations, certifications, badges, multiple pictures, your company information, company logos, etc. to the cover page. The customization is up to you.