



PDspect

INSPECTION SOFTWARE

Step by Step

How To

Save an Inspection as a Template

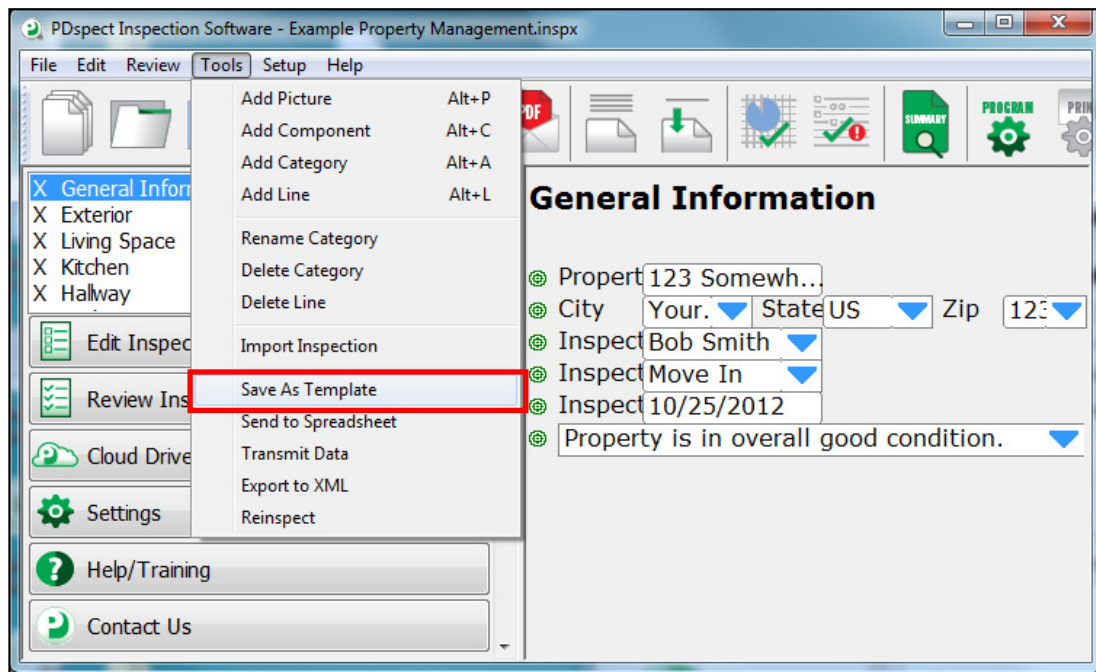
This How To article explains how to save an inspection file as a template.

For a complete list of available How To documents visit the Support section of our website: <http://www.pdspect.com/support/index.php>

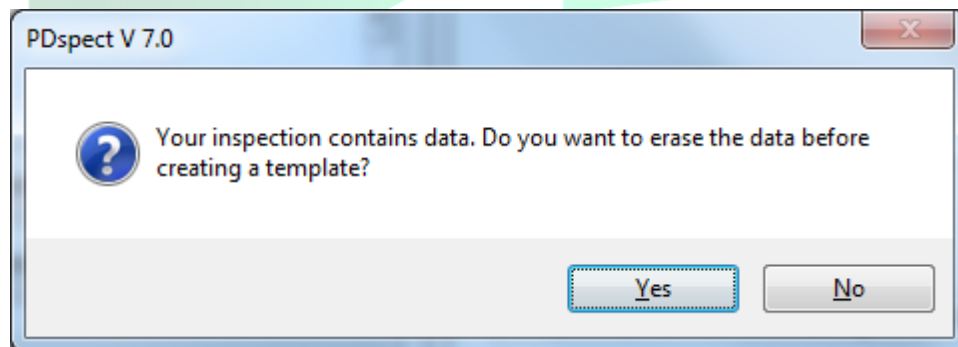
HOW TO: SAVE AN INSPECTION AS A TEMPLATE

This Document will show you how to save an open inspection as a template. This eliminates the need to repeat changes each time you begin a new inspection.

1. First, be sure to save your report by selecting File -> Save or click on the Save icon from the toolbar.
2. From the menu choose 'Tools' -> Save As Template.

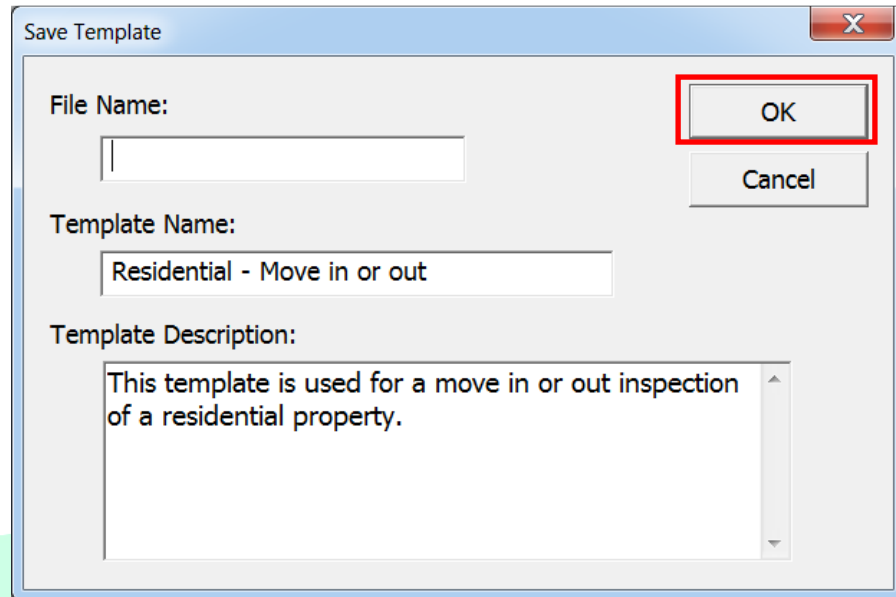


3. If your inspection contains answer data (ie ratings, descriptions, notes, etc), you will be prompted asking if you want to erase the data from the inspection first. Click 'Yes' and the answers will be erased. Click 'No' to keep the answers.

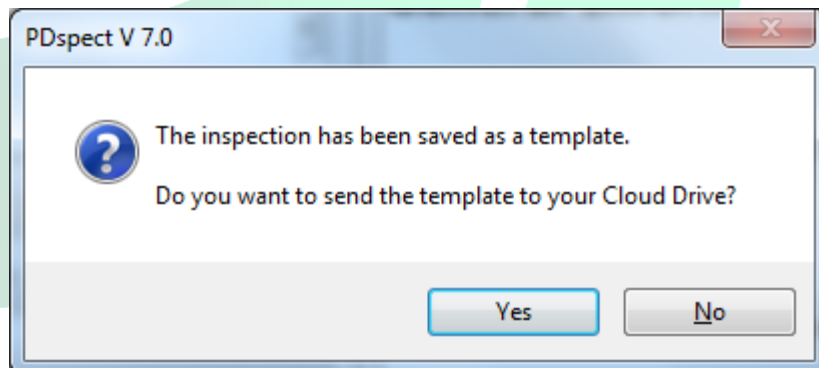


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4. Now we have the 'Save Template' window. This is where you will give your template a name and a brief description. You should not save custom templates using the default PDspect template file names. After you have entered the information, click 'Ok'.



5. After the template is created, a window will appear asking if you wish to transfer this template to your cloud drive. If you transfer the template to your cloud drive you will be able to access it with the PDspect app.



6. You are finished. The next time you start a new inspection your customized template will be listed as an option.