

# Adding an Inspection Appointment to the CRM Inspections Module



This guide provides a step-by-step process for efficiently adding inspections to the CRM Inspections module, ensuring that users can manage property inspections seamlessly.

By following these instructions, users can streamline their workflow, enhance organisation, and improve communication regarding property management.

- 1 Navigate to <https://crm.iamproperty.com/MyDay>

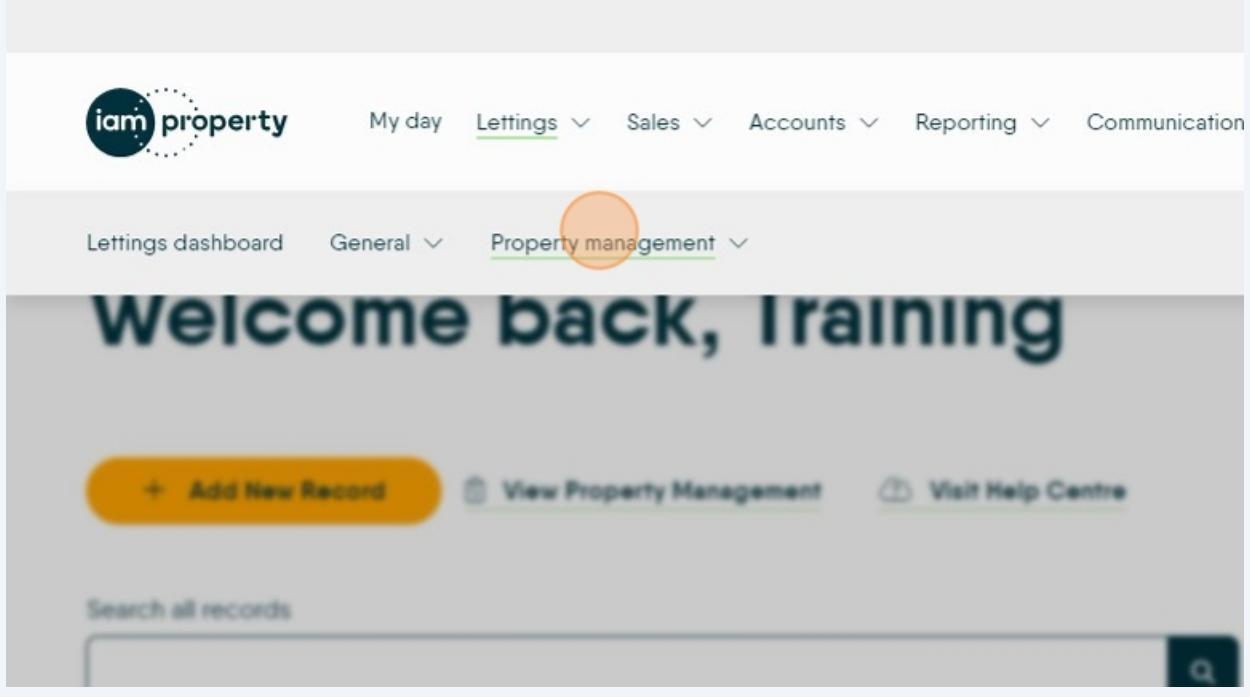
- 2 Click "Lettings"



Search all records

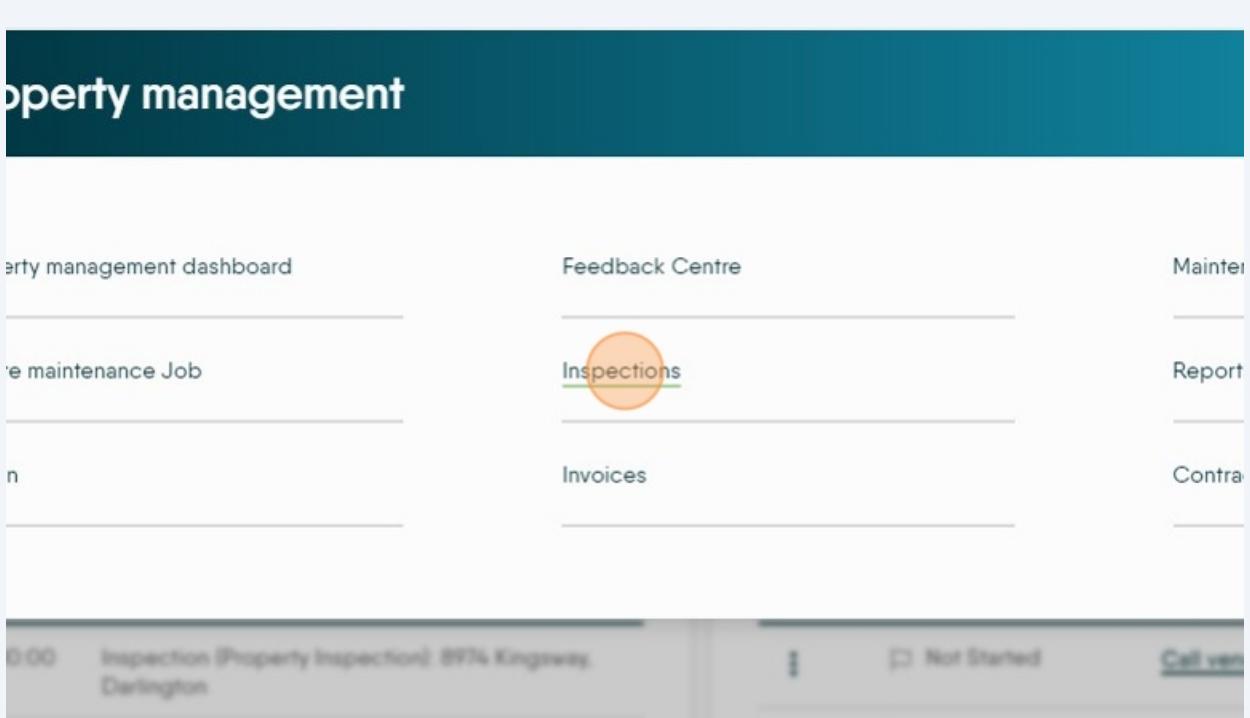


3 Click "Property management"



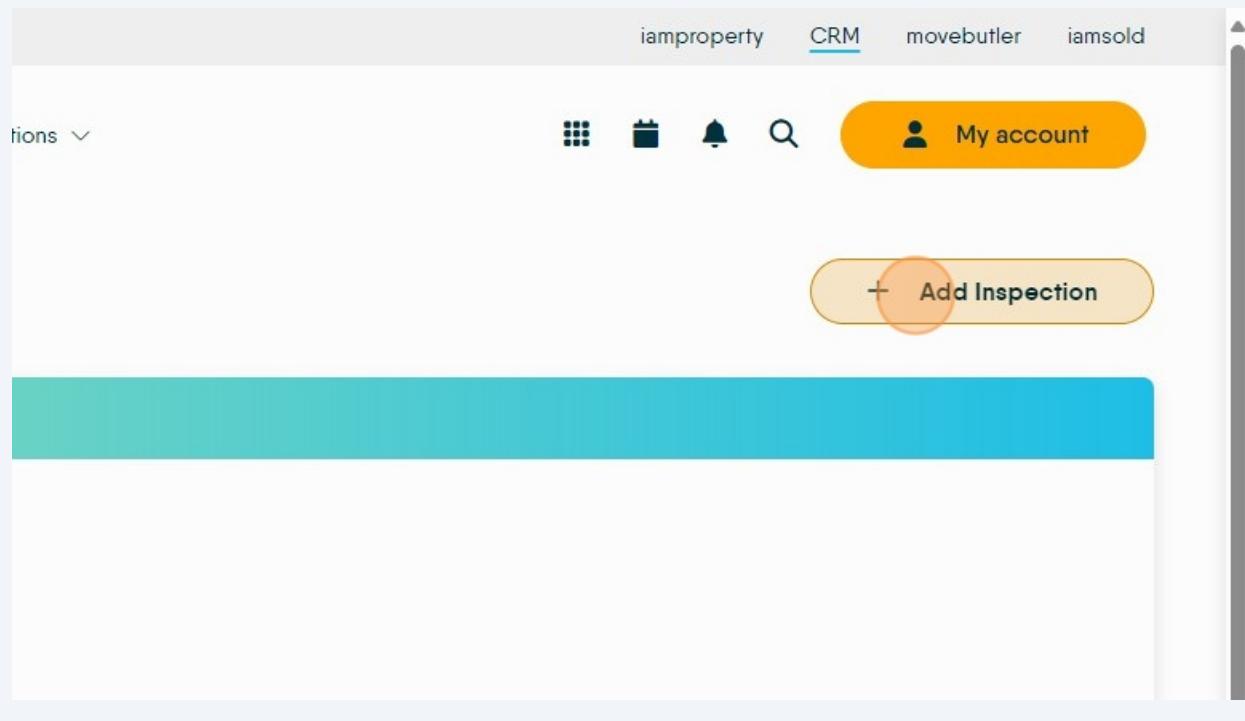
The screenshot shows the 'Property management' section of the iam property software. At the top, there is a navigation bar with links: 'My day', 'Lettings' (underlined), 'Sales', 'Accounts', 'Reporting', and 'Communication'. Below this, a secondary navigation bar shows 'Lettings dashboard', 'General', and 'Property management' (underlined and highlighted with an orange circle). A large, bold 'Welcome back, Training' message is centered. Below it are three buttons: '+ Add New Record' (yellow), 'View Property Management' (light blue), and 'Visit Help Centre' (light blue). A search bar with the placeholder 'Search all records' and a magnifying glass icon is at the bottom.

4 Click "Inspections"

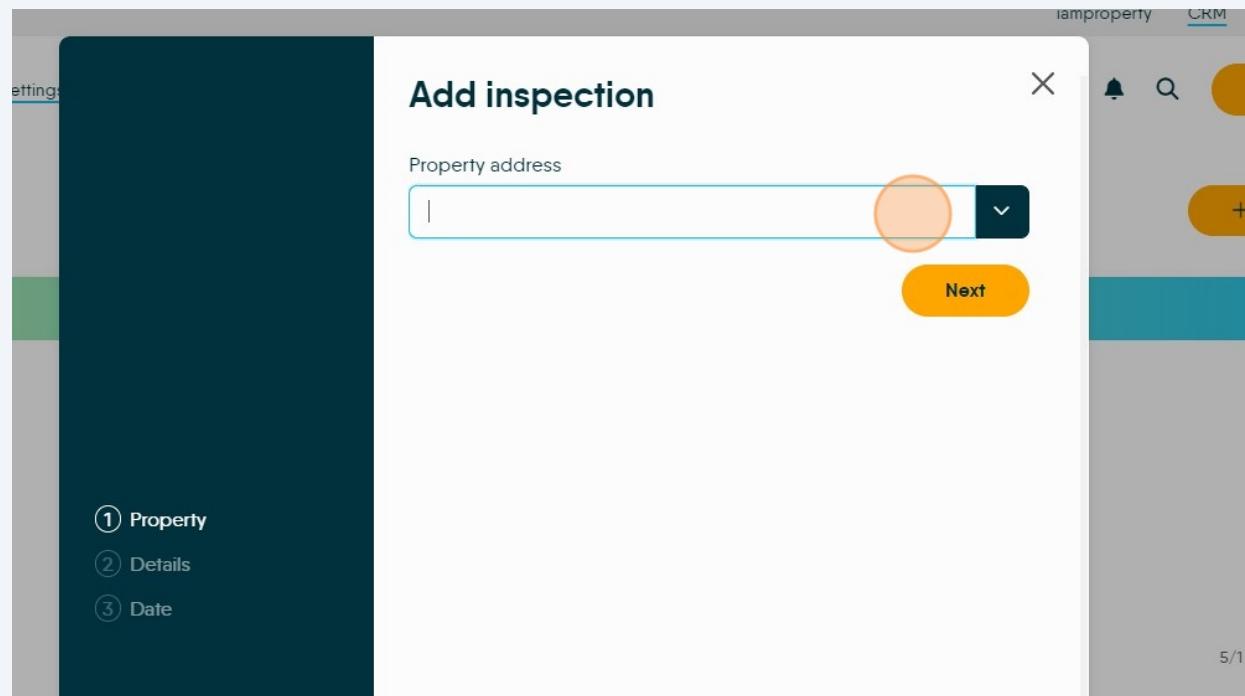


The screenshot shows the 'Property management' dashboard. The top navigation bar has 'Property management' underlined. Below the navigation, there are several cards: 'Property management dashboard', 'New maintenance Job', 'Invoices', 'Feedback Centre', 'Inspections' (underlined and highlighted with an orange circle), and 'Maintenance Requests', 'Report', 'Contracts', and 'Notices'. At the bottom, there is a summary card: '0.00 Inspection (Property Inspection): 8974 Kingsway, Darlington' with a status of 'Not Started' and a 'Call vendor' button.

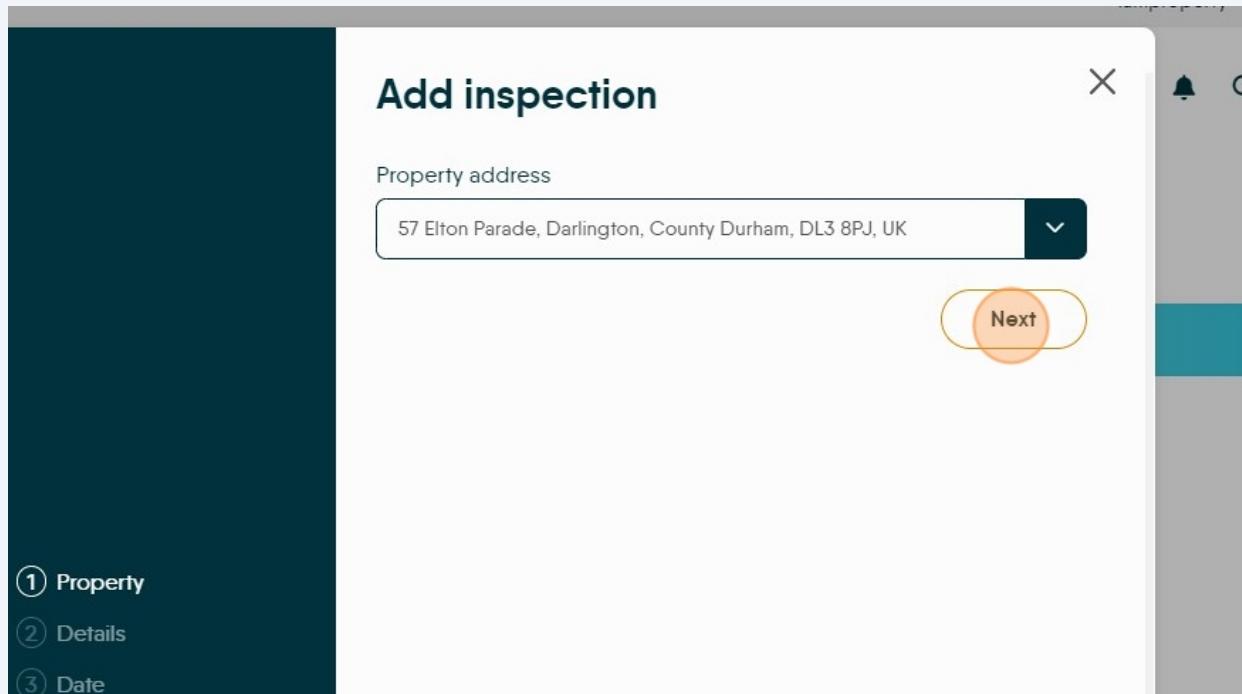
5 Click "Add inspection"



6 Click the "Property address" field. Type the property address and select from the list.



7 Click "Next"



Add inspection

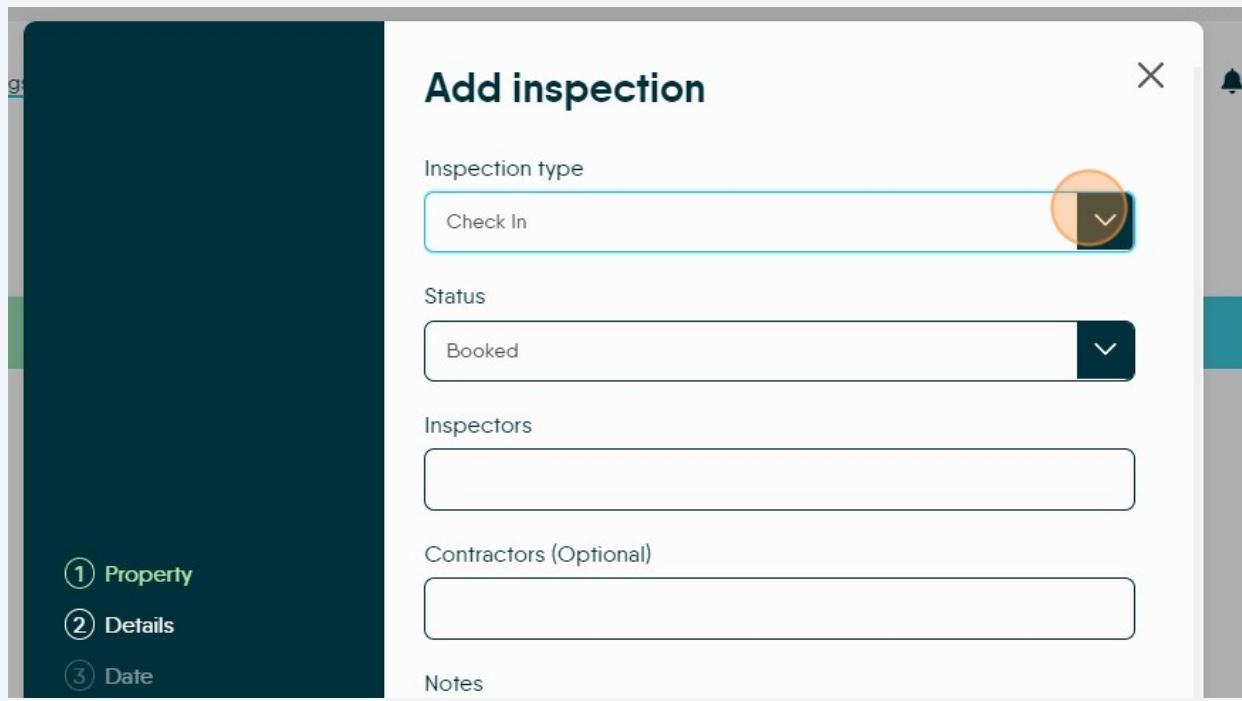
Property address

57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK

Next

① Property  
② Details  
③ Date

8 Select the 'Inspection Type' you are creating the record for.



Add inspection

Inspection type

Check In

Status

Booked

Inspectors

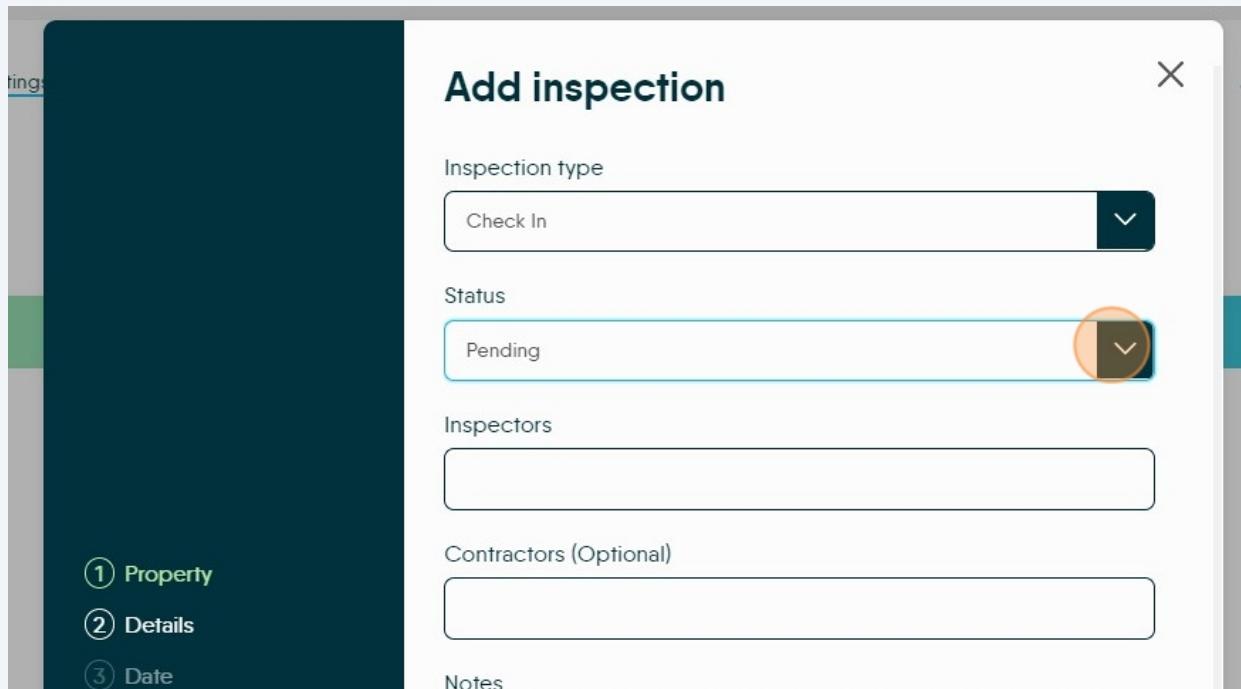
Contractors (Optional)

Notes

① Property  
② Details  
③ Date

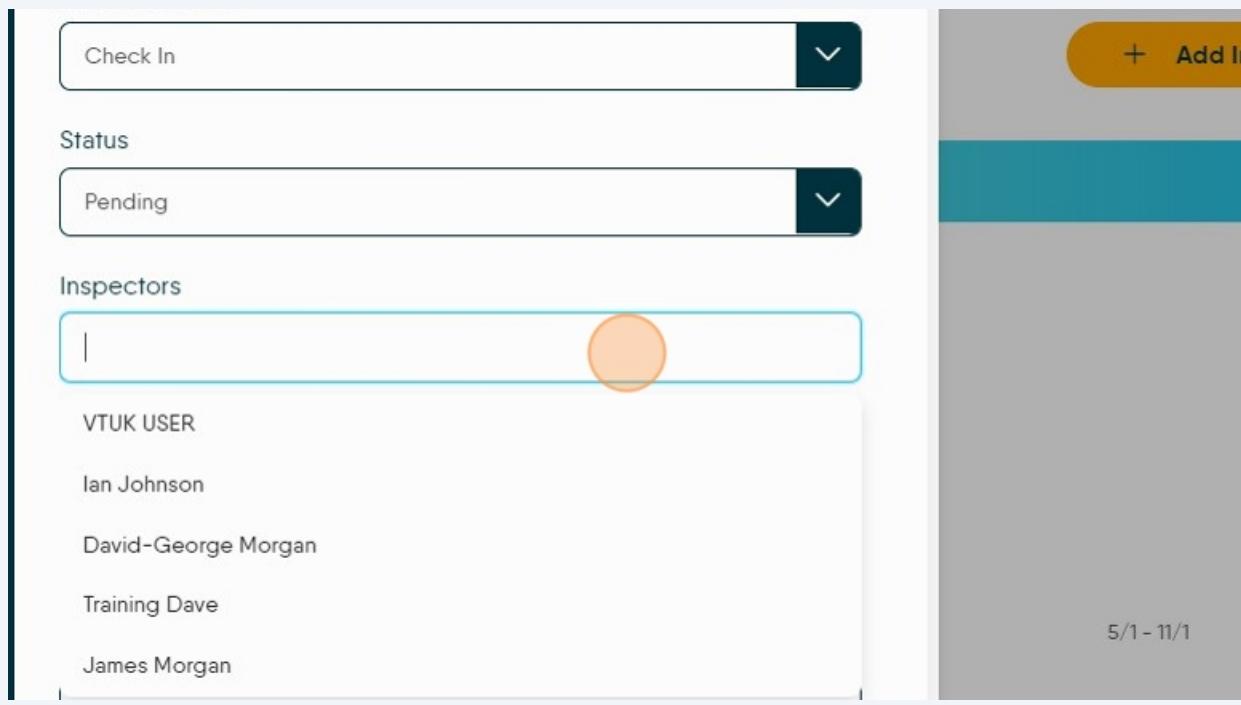
9 Select the '**Status**' option for the Inspection.

There are many status options, you can decide how to use these to suit your process



The screenshot shows a modal window titled 'Add inspection'. On the left, a sidebar lists steps: ① Property, ② Details, and ③ Date. The main area contains fields for 'Inspection type' (set to 'Check In'), 'Status' (set to 'Pending'), 'Inspectors' (empty), 'Contractors (Optional)' (empty), and 'Notes' (empty). The 'Status' dropdown has a small orange circle highlighting its dropdown arrow.

10 Click "**Inspectors**" to select the Inspector or Inspectors that are conducting the Inspection.  
Select the Inspector from the list.



The screenshot shows a list of inspectors. At the top, there are dropdown menus for 'Check In' (set to 'Check In') and 'Status' (set to 'Pending'). Below these is an 'Inspectors' input field, which is highlighted with an orange circle. A list of names is displayed below the input field: VTUK USER, Ian Johnson, David-George Morgan, Training Dave, and James Morgan. The bottom right corner shows a status bar with '5/1 - 11/1'.

Inspectors

VTUK USER

Ian Johnson

David-George Morgan

Training Dave

James Morgan

Apply inventory template (optional)

[Previous](#) [Next](#)

5/1 - 1

Status

Pending

Inspectors

Training Dave X

VTUK USER

Ian Johnson

David-George Morgan

James Morgan

① Property  
② Details  
③ Date

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Click "**Contractors**" to allocate a Contractor to the Inspection if required.

This allows you to nominate a Contractor to attend the Inspection, e.g. if there are maintenance tasks to be looked at as part of the Inspection.

The screenshot shows a software interface for managing inspection allocations. At the top, a dropdown menu is set to "Pending". Below it, the "Inspectors" section lists "Training Dave" and "VTUK USER" with an "X" button to remove them. The "Contractors (Optional)" section is empty and highlighted with an orange circle. The "Notes" section contains a placeholder "Enter notes". At the bottom, there is a checkbox for "Apply inventory template (optional)" and navigation buttons for "Previous" and "Next". A page number "5/1 - 1" is visible on the right side.

Pending

Inspectors

Training Dave X VTUK USER X

Contractors (Optional)

Notes

Enter notes

5/1 - 1

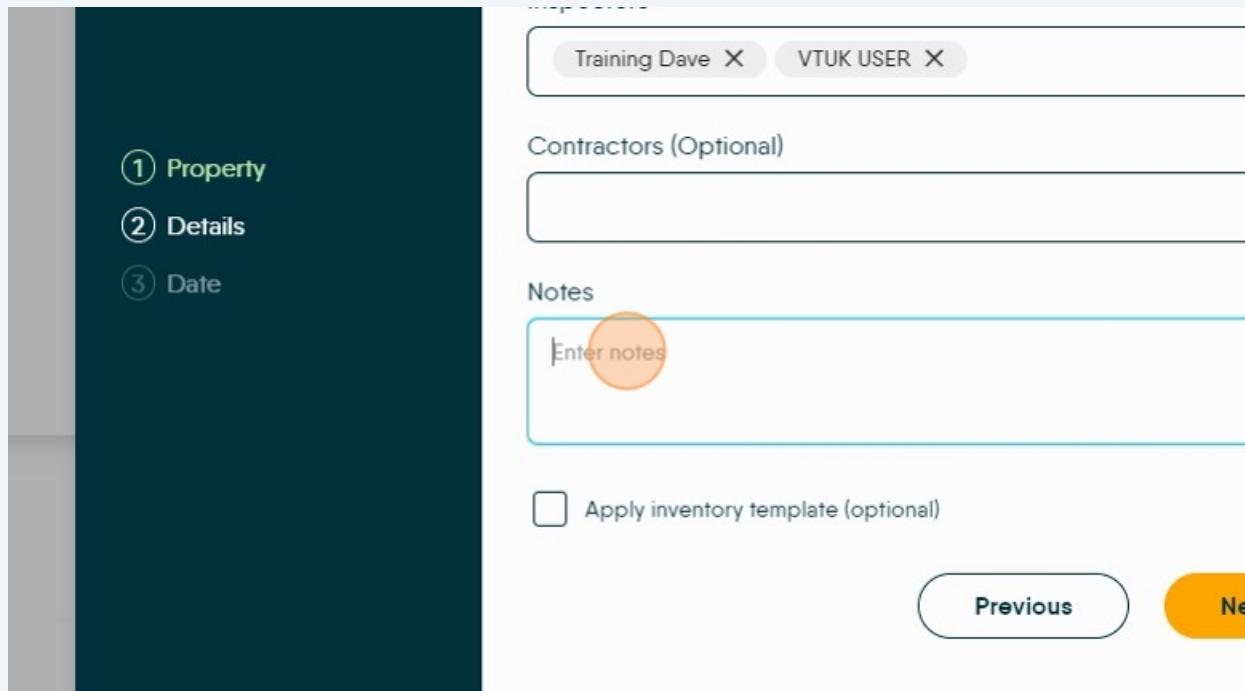
Apply inventory template (optional)

Previous Next

12

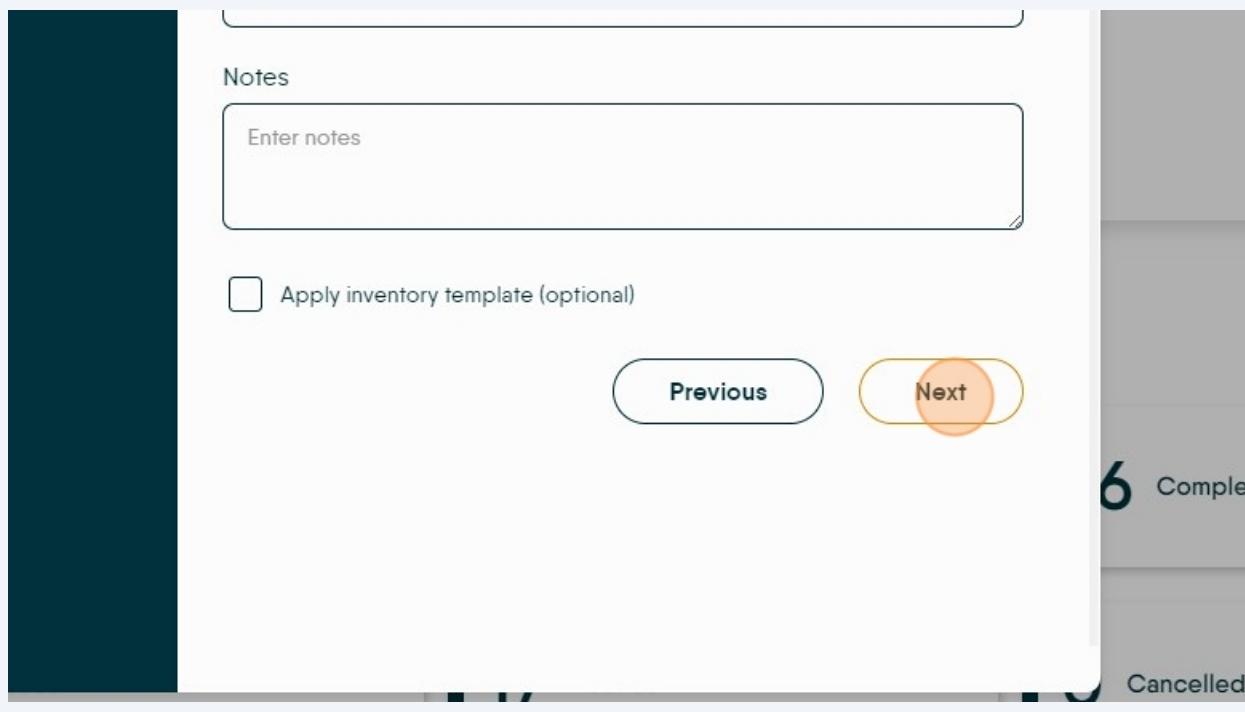
Click the "**Notes**" field. Add any notes, these will show in the jobs list on the Inspections screen.

If you want to nominate an Inspection template to be used on the Inspection it can be done here by selecting the 'Apply Inventory Template...' option and selecting a template from the menu.



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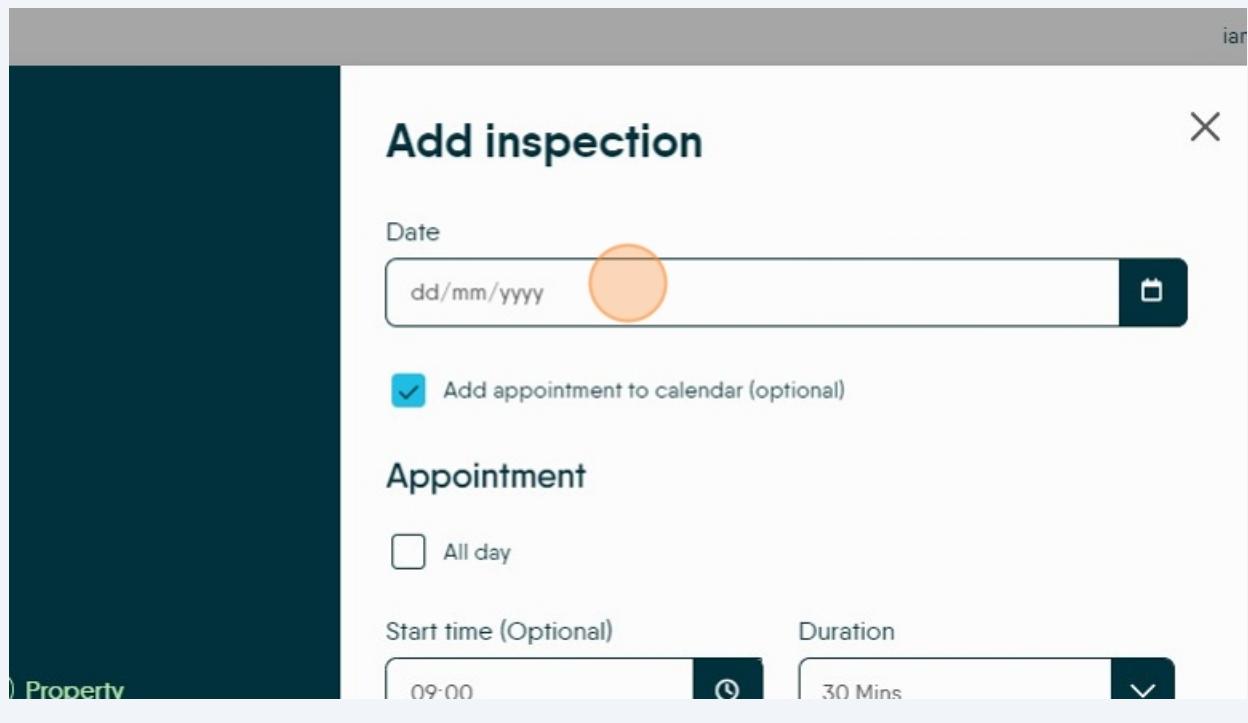
Click "**Next**"



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To create the Inspection record Click the "Date" field and add the date of the Inspections un tick the 'Add appointment to calendar' box. This will ONLY create the appointment in the Inspections screen.

If you want to add the Inspection to the Calendar at the same time, click into the 'Add Appointment to Calendar' box.



15 Click the "Start time" field. To set a start time for the inspection

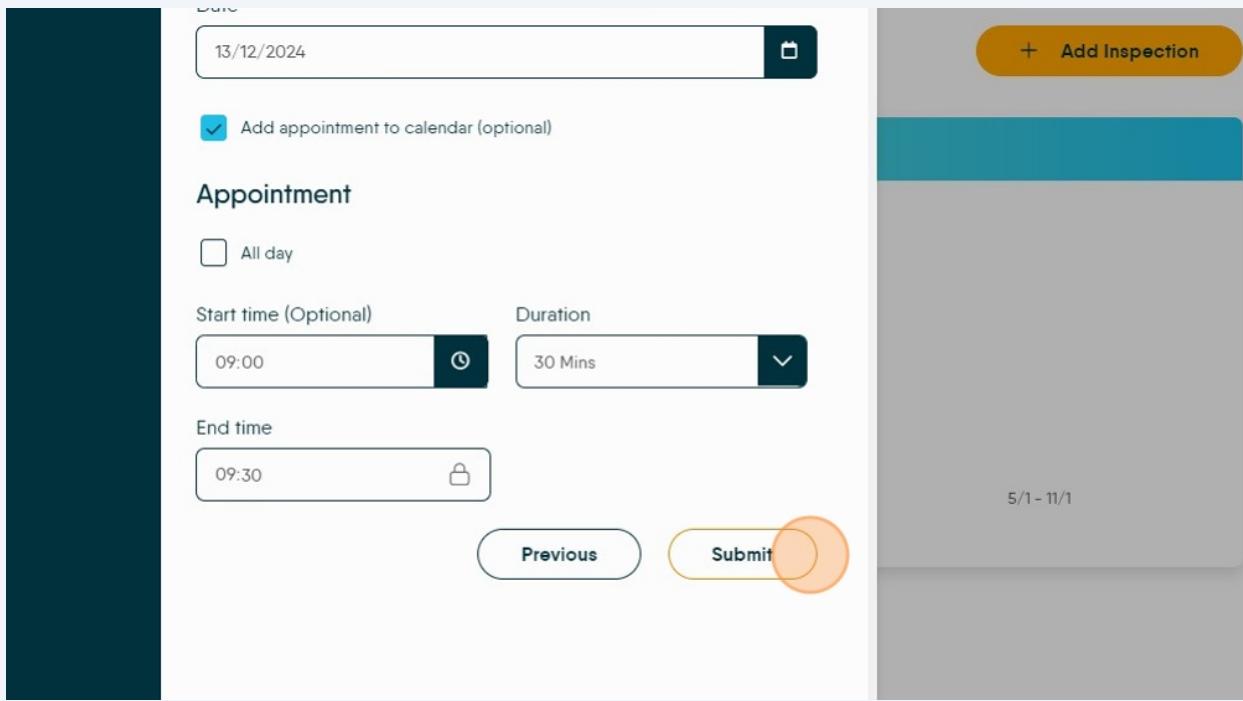
The screenshot shows a mobile application interface for booking an inspection. On the left, a vertical sidebar displays three steps: ① Property, ② Details, and ③ Date. The main content area is titled 'Appointment'. It includes an unchecked checkbox for 'Add appointment to calendar (optional)'. Below this is a section for 'Start time (Optional)' with a text input field containing '09:00' and a clock icon, which is highlighted with an orange circle. To the right is a 'Duration' field set to '30 Mins'. Below these are 'End time' fields showing '09:30' and a lock icon. At the bottom are 'Previous' and 'Submit' buttons, with 'Submit' being orange.

16 Set a duration for the appointments and the end time will be automatically created for you..

The screenshot shows the same mobile application interface as the previous step. The sidebar shows steps ①, ②, and ③. The main content area is titled 'Appointment'. It includes an unchecked checkbox for 'Add appointment to calendar (optional)'. Below this is a section for 'Start time (Optional)' with a text input field containing '09:00' and a clock icon. To the right is a 'Duration' field with a dropdown menu open, showing '30 Mins' highlighted with an orange circle. Below these are 'End time' fields showing '09:30' and a lock icon. At the bottom are 'Previous' and 'Submit' buttons, with 'Submit' being orange. A date range '5/1 - 11/1' is visible on the right side of the screen.

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Click "Submit"



This is the Inspection created and (in this case) added to the Calendar

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**The Inspection will now show in the Inspections module, the CRM Calendar and in the Inspections menu of the property.**