

Adding an Inspection Appointment to the CRM Inspections Module

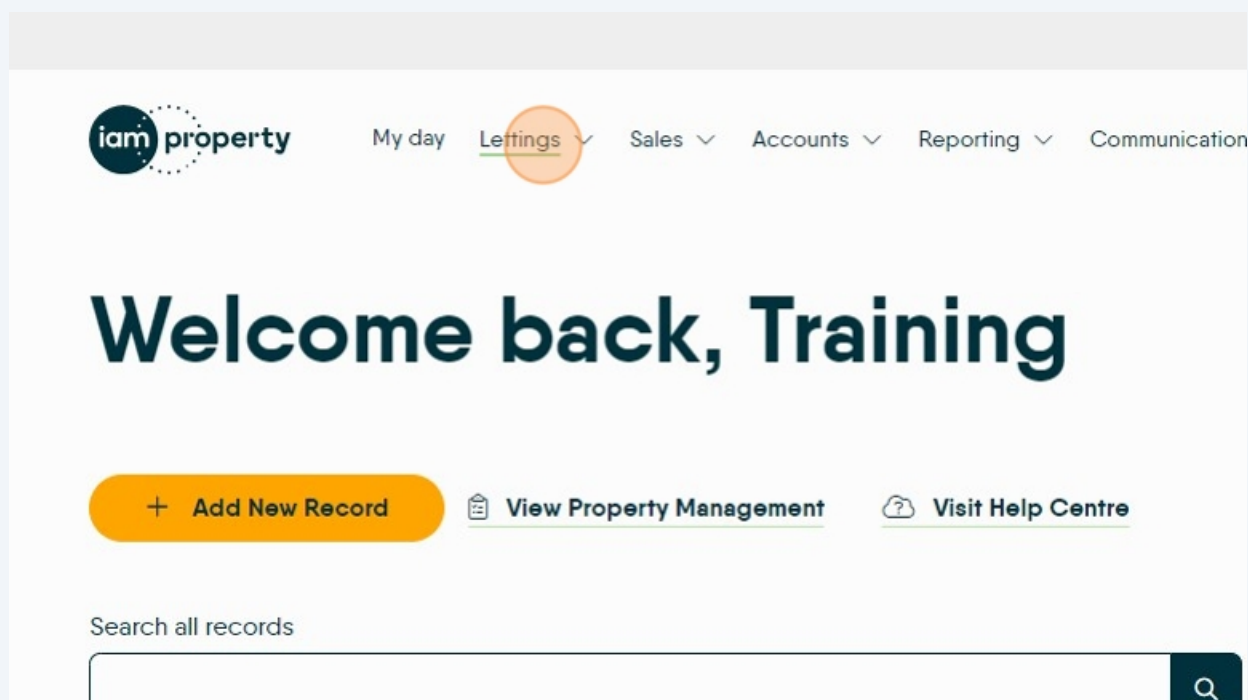


This guide provides a step-by-step process for efficiently adding inspections to the CRM Inspections module, ensuring that users can manage property inspections seamlessly.

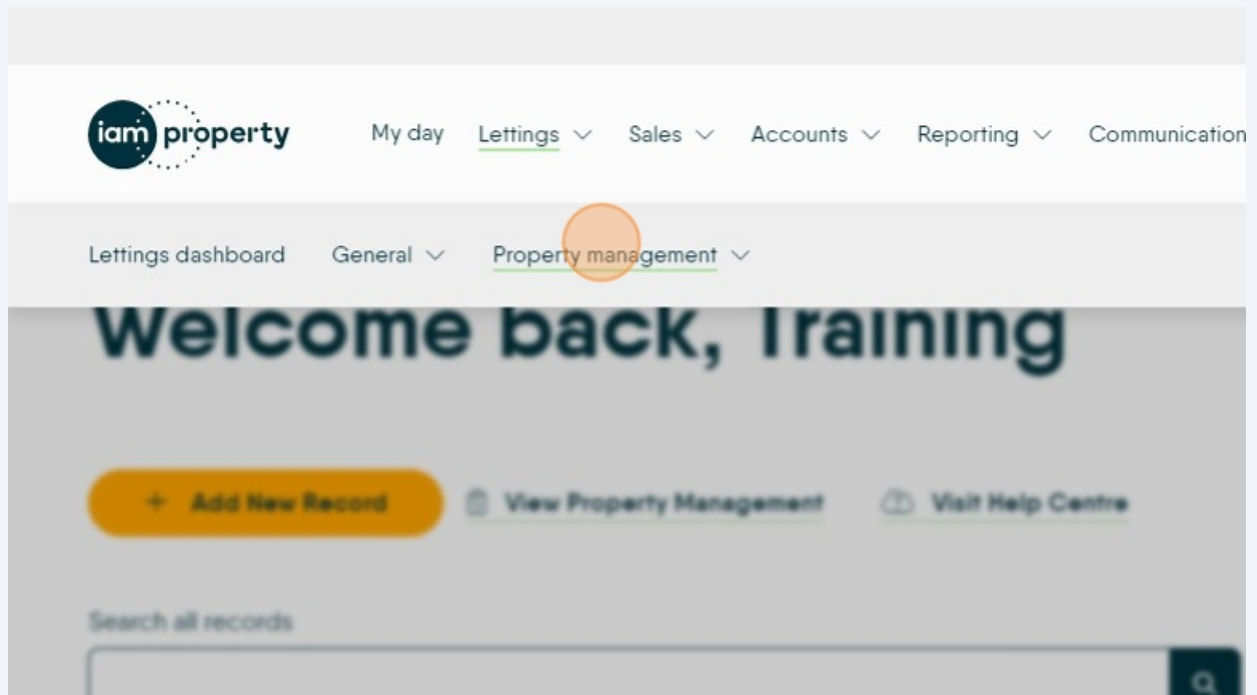
By following these instructions, users can streamline their workflow, enhance organisation, and improve communication regarding property management.

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

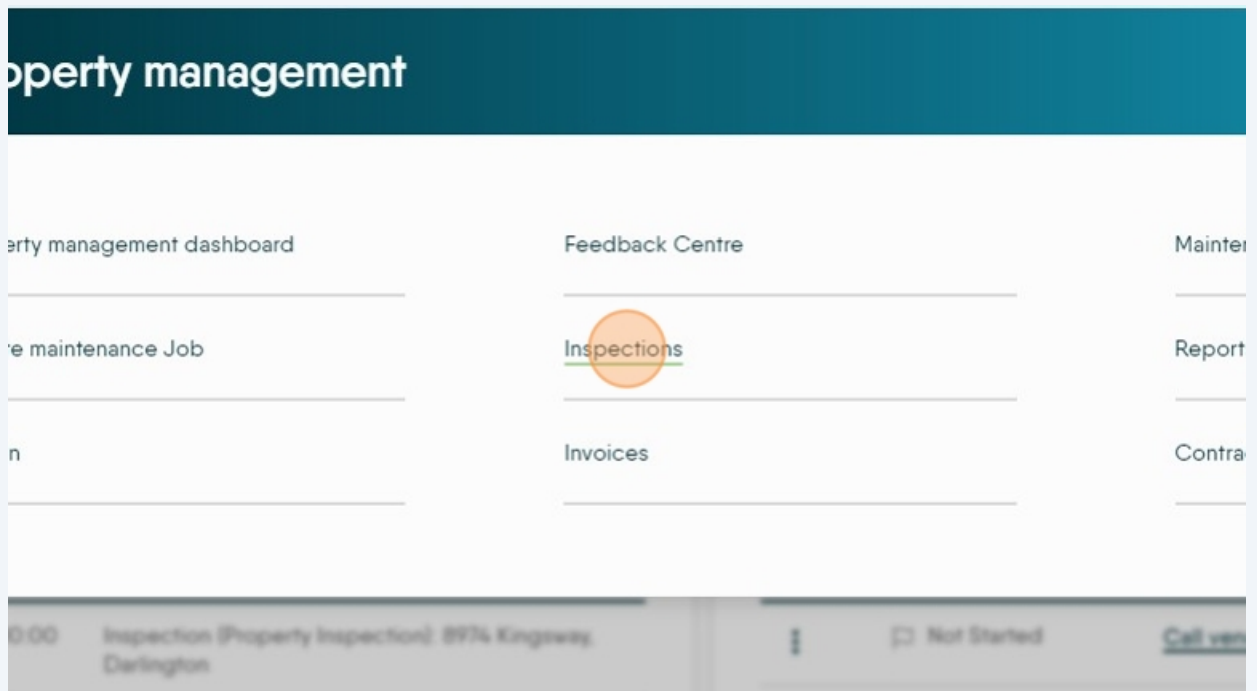
- 2 Click "**Lettings**"



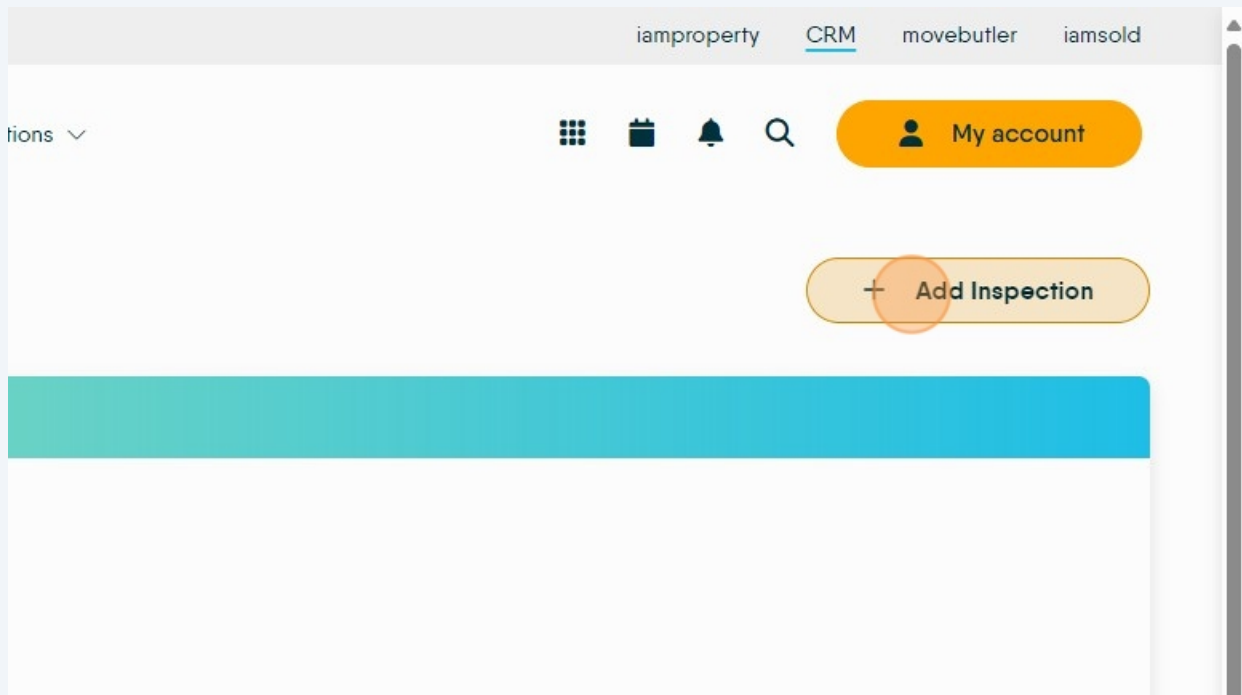
3 Click **"Property management"**



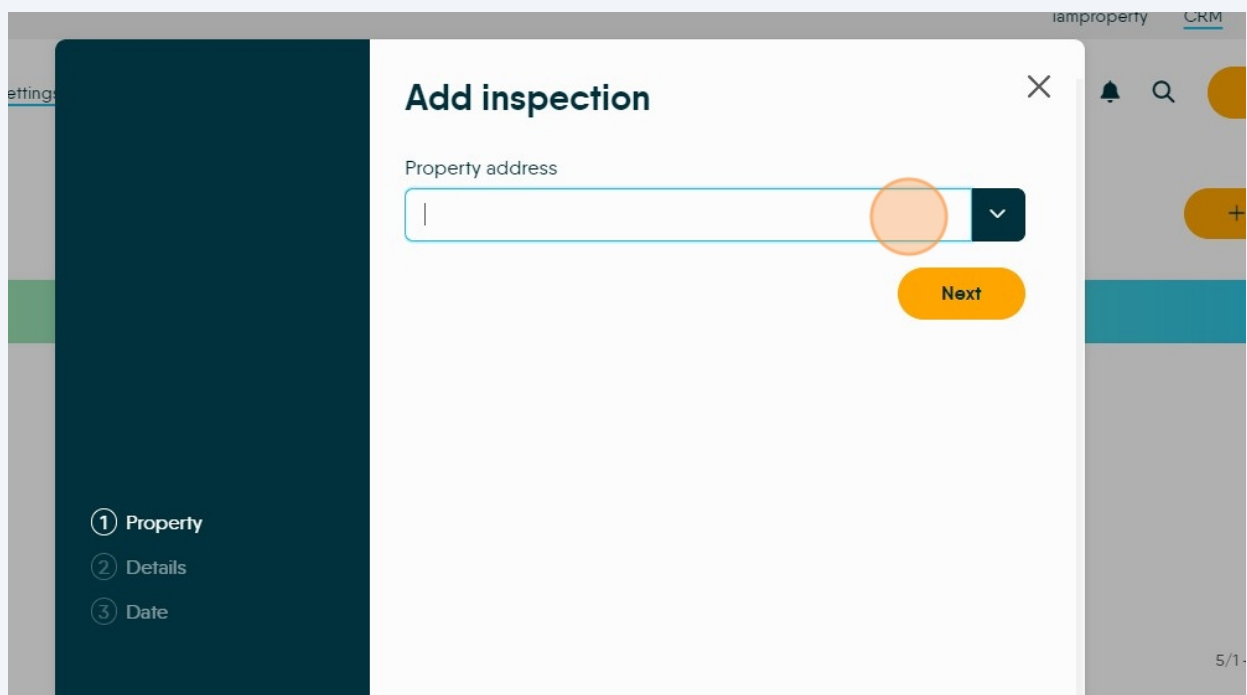
4 Click **"Inspections"**



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

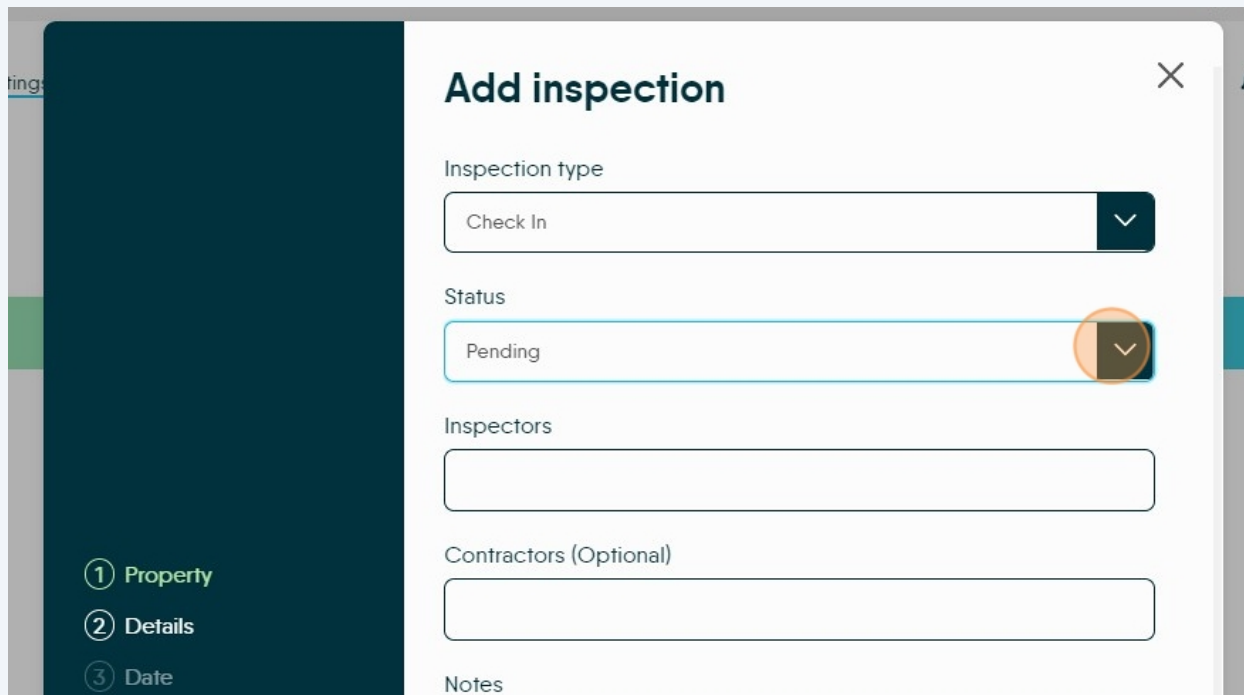
Contractors (Optional)

Notes

① Property
② Details
③ Date

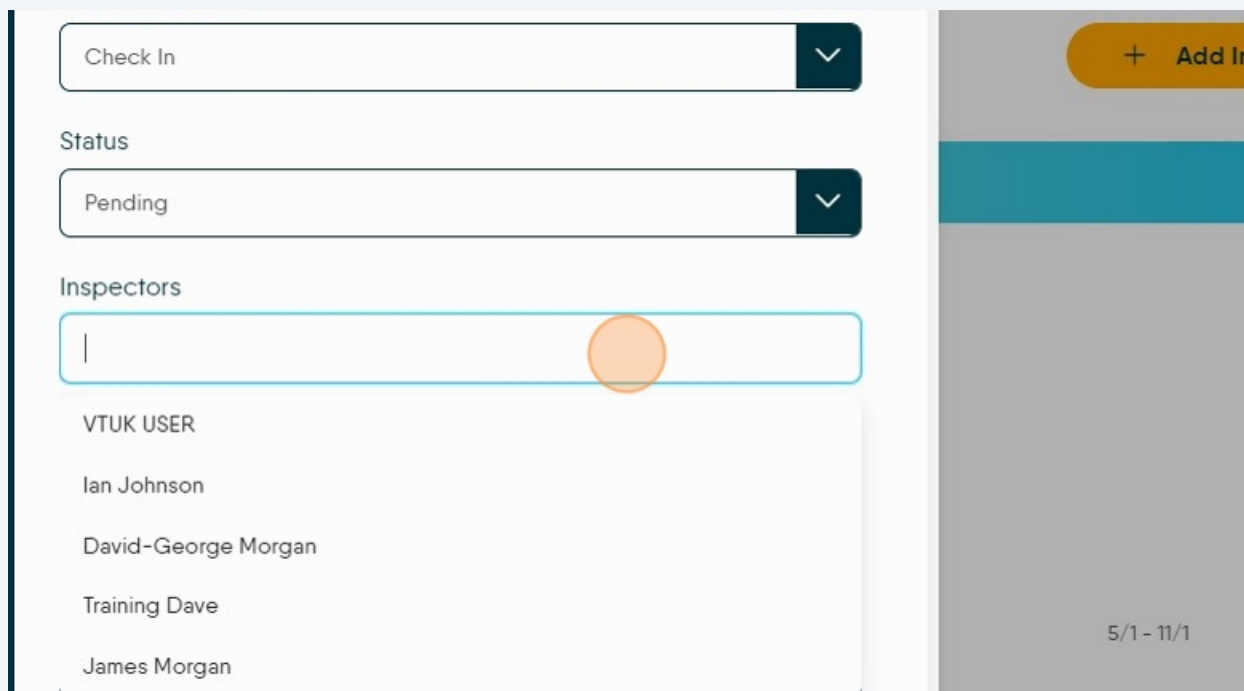
9 Select the '**Status**' option for the Inspection.

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



The screenshot shows a mobile application interface for adding an inspection. On the left is a dark blue sidebar with three options: '1 Property', '2 Details', and '3 Date'. The 'Details' option is highlighted with a green bar. The main area is titled 'Add inspection' and contains several form fields: 'Inspection type' (set to 'Check In'), 'Status' (set to 'Pending' and highlighted with an orange circle), 'Inspectors' (empty), 'Contractors (Optional)' (empty), and 'Notes' (empty). A close button (X) is in the top right corner.

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



This screenshot shows the 'Inspectors' dropdown menu from the previous form. The dropdown is open, displaying a list of names: 'VTUK USER', 'Ian Johnson', 'David-George Morgan', 'Training Dave', and 'James Morgan'. The 'Inspectors' label above the dropdown is highlighted with an orange circle. To the right of the dropdown, a portion of another screen is visible, showing a '+ Add In' button and a date range '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

① Property

② Details

③ Date

Status

Pending



Inspectors

Training Dave X



VTUK USER

Ian Johnson

David-George Morgan

James Morgan

Enter notes

- 11 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 web application interface for managing inspections. On the left is a dark blue sidebar. The main content area has a light grey background. At the top, there is a dropdown menu with 'Pending' selected. Below this is a section titled 'Inspectors' containing a horizontal list of tags: 'Training Dave' and 'VTUK USER', each with a close button (X). Underneath is a section titled 'Contractors (Optional)' with an empty text input field; an orange circle highlights the right side of this field. Below that is a 'Notes' section with a larger text area containing the placeholder text 'Enter notes'. At the bottom left of the form is a checkbox labeled 'Apply inventory template (optional)'. At the bottom right are two buttons: 'Previous' (disabled, light grey) and 'Next' (active, orange).

Pending

Inspectors

Training Dave X VTUK USER X

Contractors (Optional)

Notes

Enter notes

☐ 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.

The screenshot shows a web application interface for creating an inspection. On the left is a dark blue sidebar with three menu items: '1 Property' (highlighted in green), '2 Details', and '3 Date'. The main content area is white and contains the following elements: a header with two tabs 'Training Dave X' and 'VTUK USER X'; a section titled 'Contractors (Optional)' with an empty text input field; a section titled 'Notes' with a text input field containing the placeholder 'Enter notes', which is highlighted with an orange circle; a checkbox labeled 'Apply inventory template (optional)'; and two buttons at the bottom right, 'Previous' and 'Next' (partially visible as 'Ne').

13

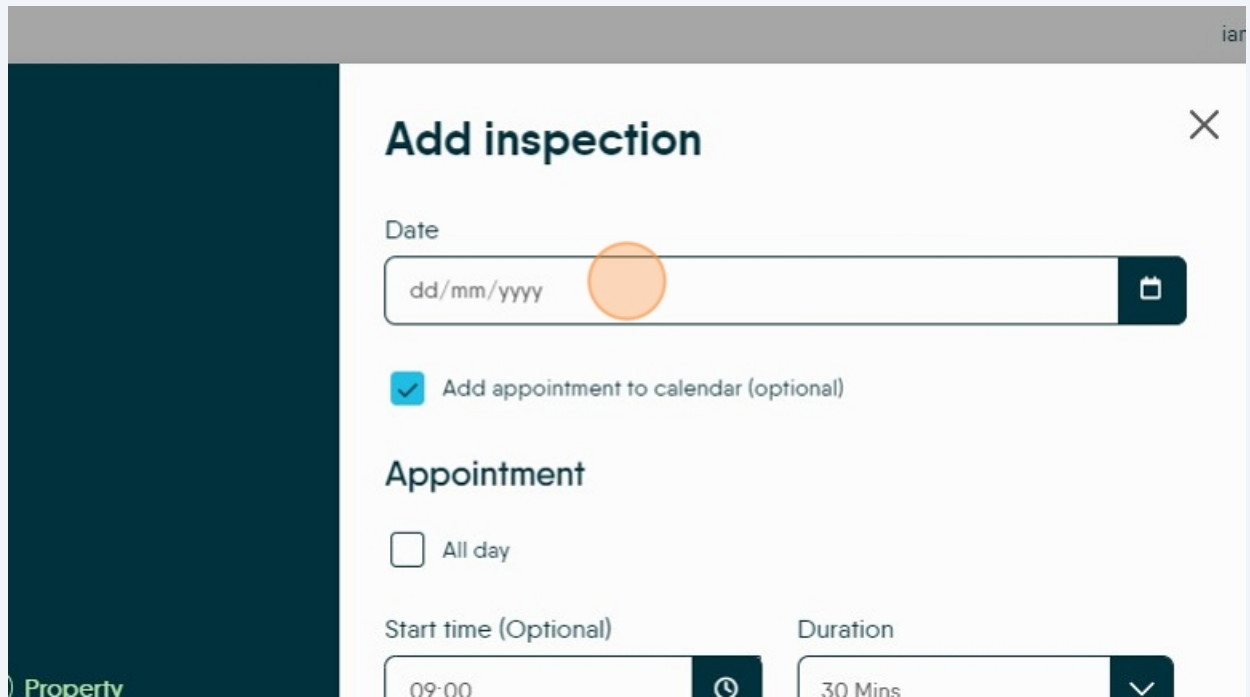
Click **"Next"**

This screenshot shows the same inspection form as in the previous step, but with the 'Next' button highlighted by an orange circle. The 'Notes' field is still visible with the 'Enter notes' placeholder. The 'Apply inventory template (optional)' checkbox remains unchecked. The 'Previous' button is also visible. In the background, a grey sidebar is partially visible, showing a large number '6' and the word 'Completed', and at the bottom, the word 'Cancelled'.

14

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.



The screenshot shows a web application interface for adding an inspection. On the left is a dark blue sidebar with the word "Property" at the bottom. The main content area is white and titled "Add inspection" in bold dark blue text, with a close button (X) in the top right corner. Below the title, there is a "Date" label above a text input field containing the placeholder "dd/mm/yyyy". An orange circle highlights this input field. To the right of the input field is a dark blue button with a white calendar icon. Below the date field is a checkbox that is checked, with the text "Add appointment to calendar (optional)". Underneath this is the section header "Appointment" in bold. Below it is an unchecked checkbox labeled "All day". At the bottom, there are two input fields: "Start time (Optional)" with the value "09:00" and a clock icon, and "Duration" with the value "30 Mins" and a dropdown arrow icon.

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

The screenshot shows a form titled 'Appointment' with a sidebar on the left containing three items: '1 Property', '2 Details', and '3 Date'. The main form area has a checkbox 'Add appointment to calendar (optional)' which is checked. Below this is the 'Appointment' section. It includes an 'All day' checkbox which is unchecked. There are two input fields: 'Start time (Optional)' and 'Duration'. The 'Start time' field contains '09:00' and is highlighted with an orange circle. The 'Duration' field contains '30 Mins'. Below these is an 'End time' field containing '09:30'. At the bottom right, there are two buttons: 'Previous' and 'Submit' (partially visible).

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

The screenshot shows the same 'Appointment' form as in step 15. The 'Duration' dropdown menu is open, showing three options: '15 Mins', '30 Mins', and '45 Mins'. The '30 Mins' option is highlighted with an orange circle. The 'Start time' field still contains '09:00' and the 'End time' field still contains '09:30'. The 'Add appointment to calendar (optional)' checkbox is checked. The sidebar on the left is still visible.

17 Click "Submit"

The screenshot shows a web interface for adding an inspection. On the left is a dark blue sidebar. The main content area is white and contains the following elements: a date input field with '13/12/2024' and a calendar icon; a checked checkbox labeled 'Add appointment to calendar (optional)'; a section header 'Appointment'; an 'All day' checkbox; 'Start time (Optional)' input with '09:00' and a clock icon; 'Duration' input with '30 Mins' and a dropdown arrow; 'End time' input with '09:30' and a lock icon; and two buttons at the bottom, 'Previous' and 'Submit'. The 'Submit' button is highlighted with a large orange circle. To the right of the form is a grey sidebar with an orange '+ Add Inspection' button at the top and a calendar view showing '5/1 - 11/1'.

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

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