

# Configuring and Creating a New Inspection Template in CRM

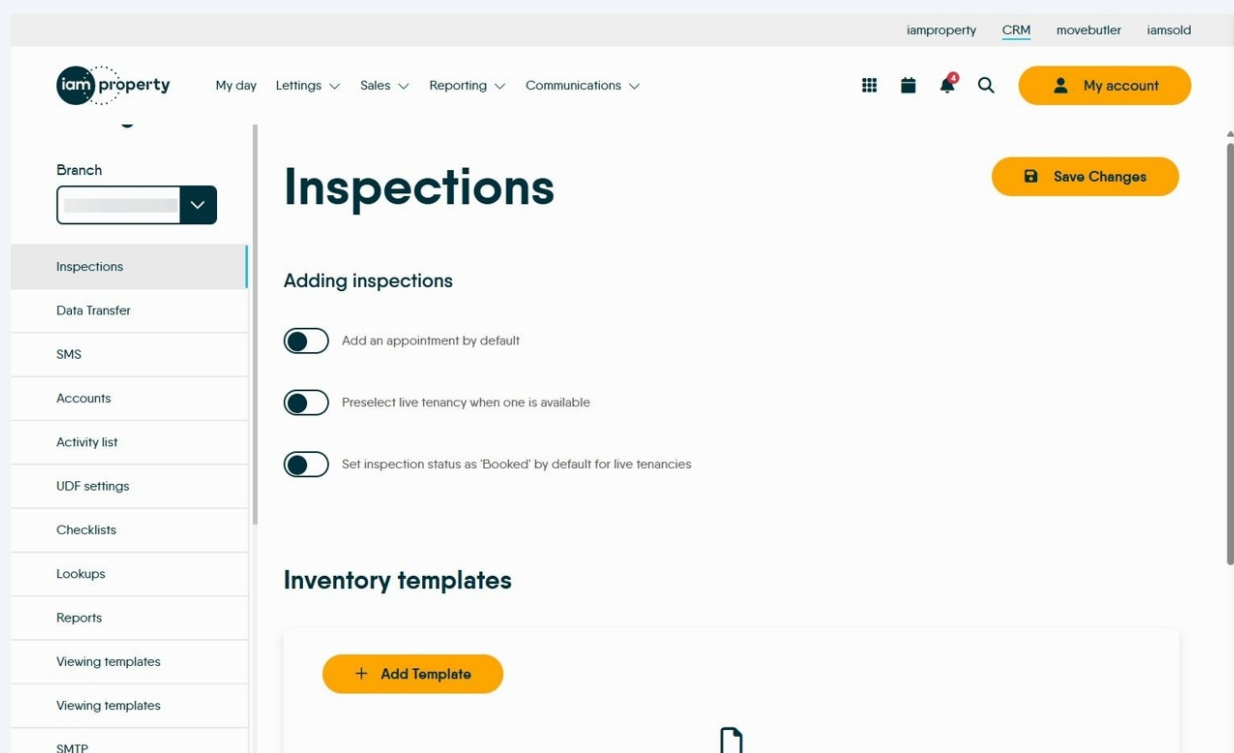


This guide offers a step-by-step process for configuring the Inspections module and creating a new Inspection Template in CRM, making it essential for property managers and inspectors looking to streamline their inspection workflows.

By following the detailed instructions, users can easily customise templates, set default settings, and add specific checks for each room, enhancing efficiency and organisation.

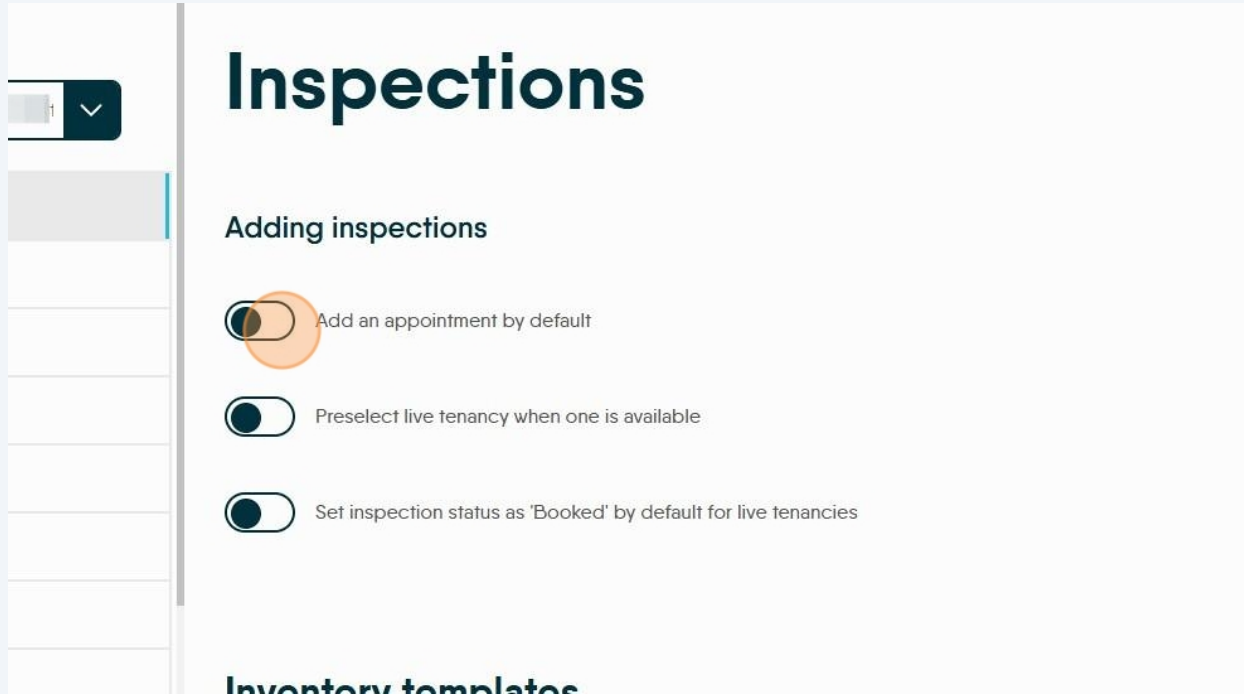
1

Navigate to <https://crm.iamproperty.com/ControlCentre/Configuration/New/Inspections?selectedBranch=1924297>

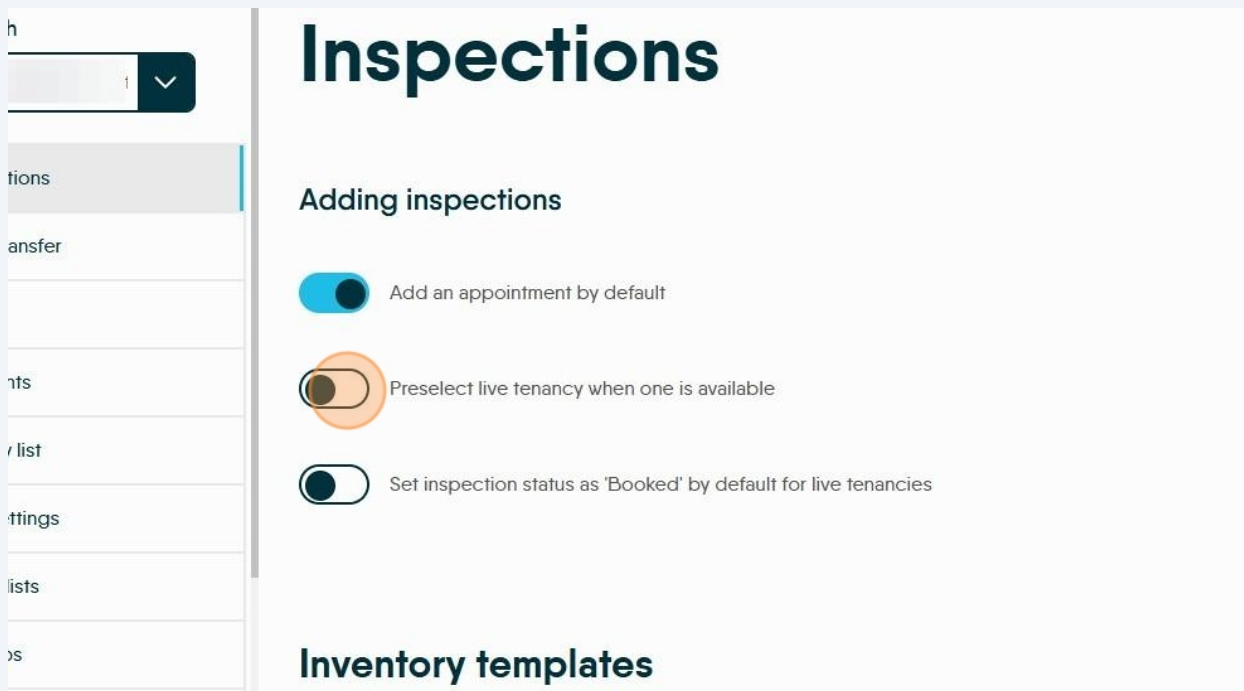


2 Adding Inspections manages what happens as a template is created.

Click here to **add an appointment by default** when you are setting up the Inspection. This will ask for a date and time, Inspector name for a new appointment and the calendar the appointment is to be added to.



3 Click here, '**Preselect Live tenancy...**' will add the lead tenants detail to the inspection as it is created.



4

Click here, 'Set inspections status as booked...' will set the inspection status to Booked if the property has a live tenant.

**Adding inspections**

☒ Add an appointment by default

☒ Preselect live tenancy when one is available

☐ Set inspection status as 'Booked' by default for live tenancies

**Inventory templates**

+ Add Template

5

Click the "Default start time" field. This will allow a default start time for the day to be set

+ Add Template

**No inventory templates**

Select '+ Add template' to get started

Default start time (Optional)

09:00

Default inspection duration

1h


Default travel time

30m

6

Click this dropdown to set a default duration for the inspections..


+ Add Template




**No inventory templates**

Select '+ Add template' to get started


Default start time (Optional)

09:00 

Default inspection duration

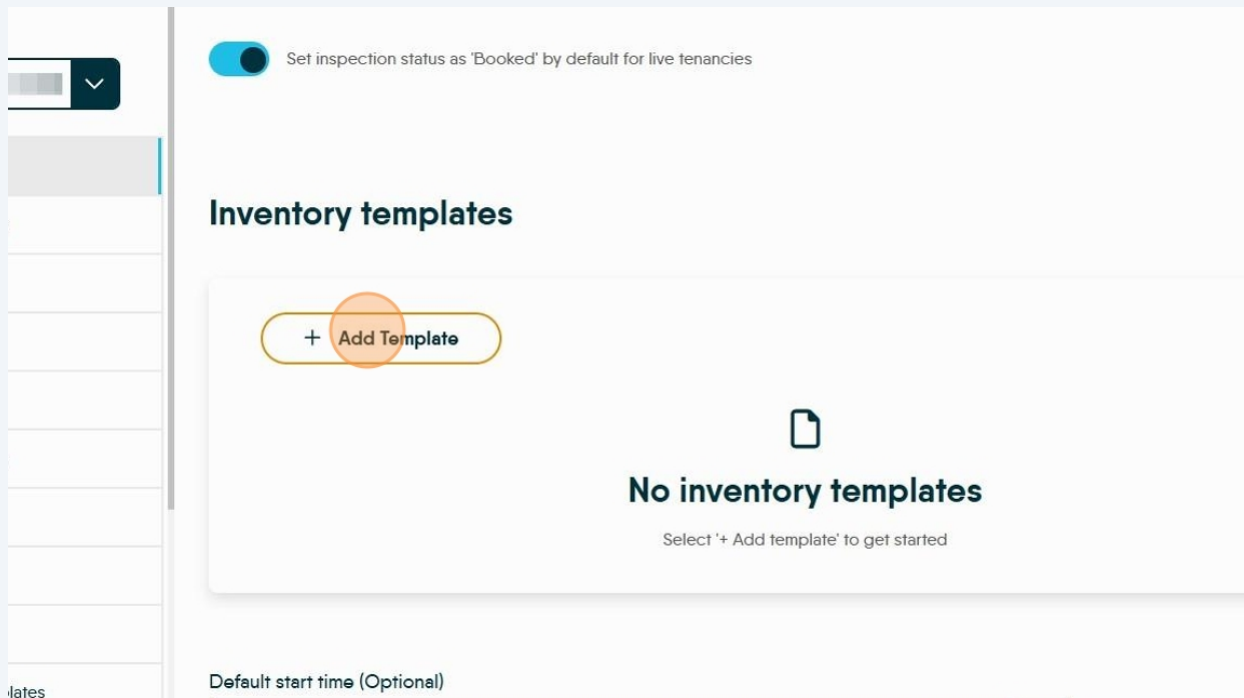
1h 

Default travel time

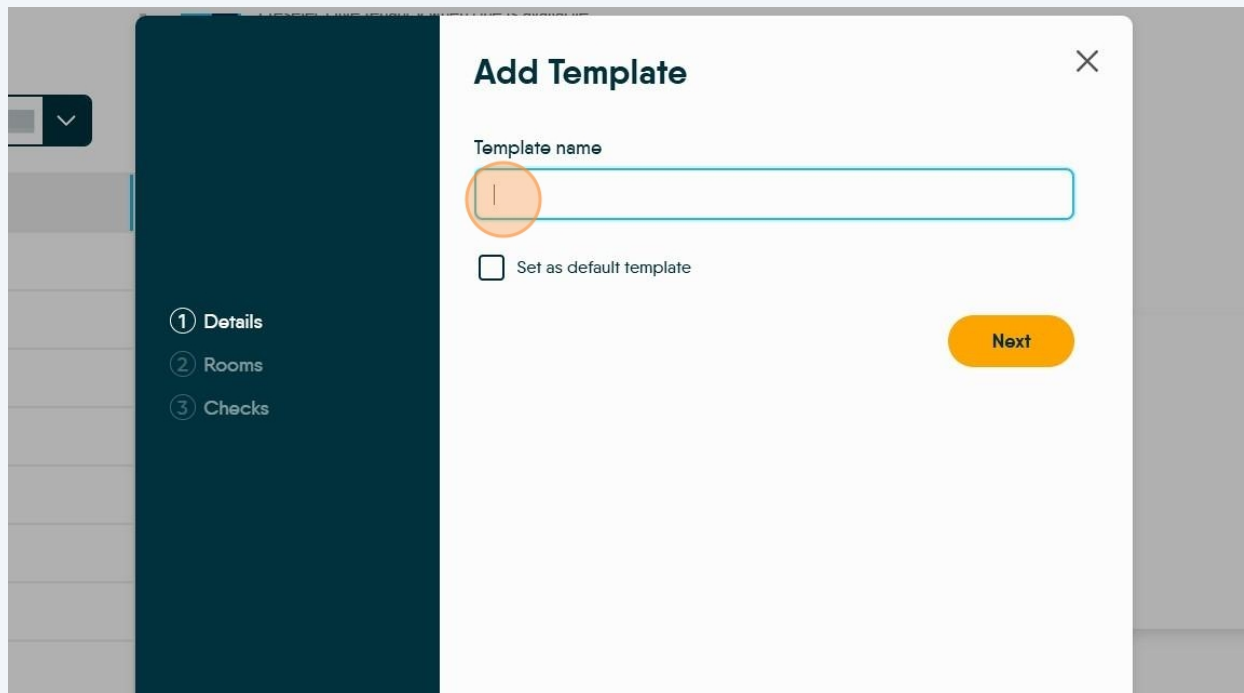
30m 

**Creating a Template.**

7 Click "Add template"



8 Click the "Template name" field and name your template.



9 Click "Next"

erty My day Lettings Sales Reporting Communications My account

### Add Template

Template name

Waldorf

☐ Set as default template

Next

1 Details  
2 Rooms  
3 Checks

Default start time (Optional)

10 Now set the Room Types. Select the option from the drop down menu.

### Add Template

Room 1

Room type

Outside

Room name


Outside

+ Add Room

Previous Next

1 Details  
2 Rooms  
3 Checks

- 11 Click the "Customise room name" field and name the room as you require.

 Tip! There are 2 options from here. To create a room and add the checks for each room ([https://scribehow.com/shared/Creating A New Inspection Template In CRM\\_gWnO01hjTVCPuEplgdPBZg#7dc30cac](https://scribehow.com/shared/Creating_A_New_Inspection_Template_In_CRM_gWnO01hjTVCPuEplgdPBZg#7dc30cac)) or, add all the rooms and then go back and add the checks to each room.

## Create Rooms and Add Checks

12 Click "Next"

**Add Template** [Close]

Room 1

Room type  
Outside [Dropdown Arrow]

Room name  
Front Door

+ Add Room

Previous Next

13 Checks are the activities to be completed in each room e.g. Check Doors.

Click the "Customise check name" field and give the check a name.

**Add Template** [Close]

Front Door (Room 1 of 1)

Check 1

Check name  
Customise check name

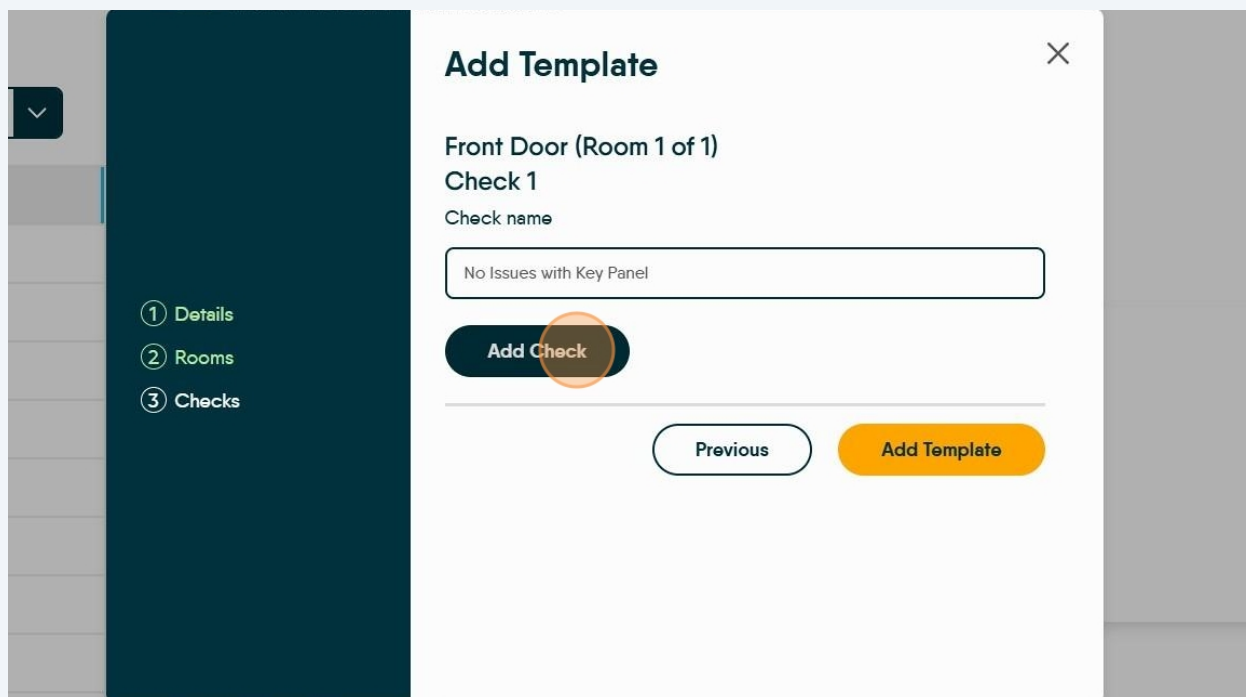
Add Check

Previous Add Template



- 14 Click "Add Check" to add a further check to that room.

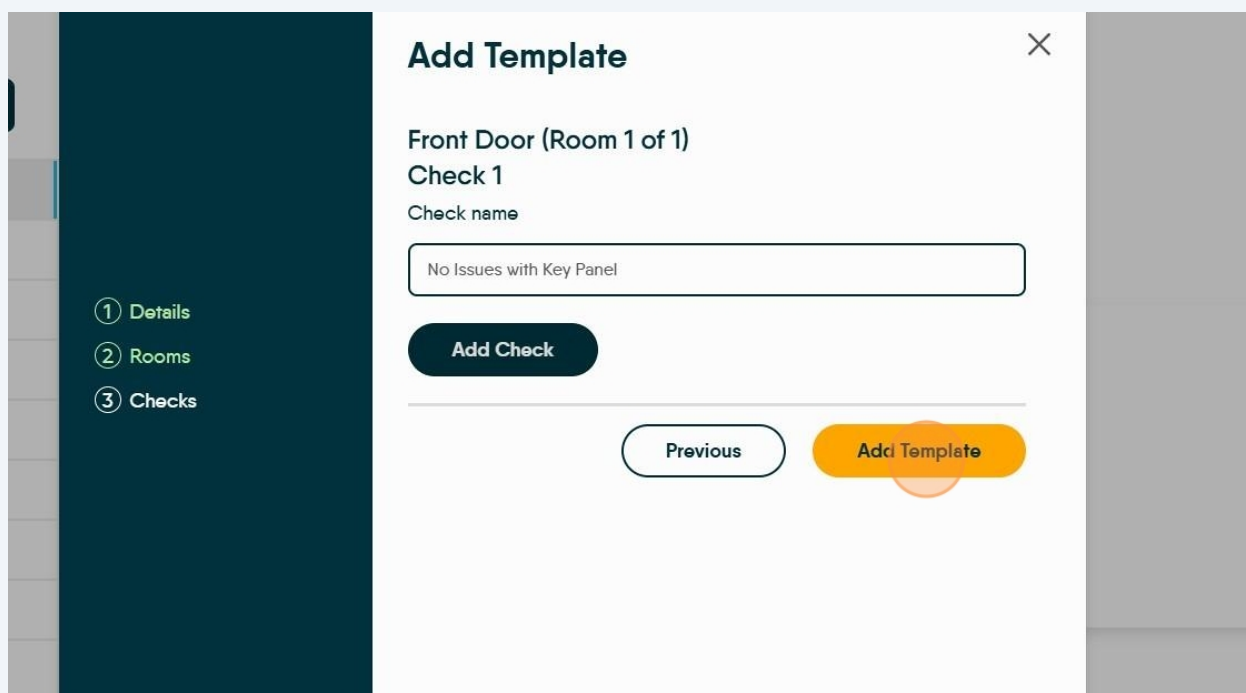
A room can have as many checks as required.



The screenshot shows a dark sidebar on the left with three menu items: '1 Details', '2 Rooms', and '3 Checks'. The 'Checks' item is highlighted. The main content area is a white modal titled 'Add Template' with a close button (X) in the top right. Inside the modal, the text 'Front Door (Room 1 of 1)' and 'Check 1' is displayed. Below this is a label 'Check name' and a text input field containing 'No Issues with Key Panel'. A dark blue button labeled 'Add Check' is positioned below the input field and is circled in orange. At the bottom of the modal are two buttons: 'Previous' and 'Add Template'.

- 15 Click "Add Check" to add a further check to that room.

A room can have as many checks as required. Once completed click Add Template



This screenshot is identical to the one above, showing the 'Add Template' dialog box. However, in this instance, the 'Add Template' button at the bottom right of the modal is circled in orange, indicating the next step in the process.

# Create All rooms then add checks

16 After creating the first room. Click "Add room" to add a further room/s

⌵

① Details

② Rooms

③ Checks

Room 1

Room type

Outside

Room name

Front Door

+ Add Room

Previous

Next

Default start time (Optional)

- 17 Select the room type from the drop down menu.

**Add Template**

**Room 1**

Room type: Outside

Room name: Front Door

**Room 2**

Room type: Other

Room name: Customise room name

Default start time (Optional)

- 18 Click this dropdown.

**Add Template**

**Room 1**

Room type: Outside

**Room 2**

Room type: Kitchen, Bedroom, Living room, Bathroom, Outside, Dining room, Hall, Office, Play room, Utility, Other

Room name: Customise room name

Default start time (Optional)

- 19 Click the "Customise room name" field to name the room.

The screenshot shows a mobile application interface with a dark blue sidebar on the left containing three menu items: '1 Details', '2 Rooms', and '3 Checks'. The 'Rooms' item is highlighted. The main content area is titled 'Add Template' and has a close button (X) in the top right corner. It contains a list of rooms. The first room is 'Front Door' with a green checkmark. The second room is 'Room 2' with a trash icon. Under 'Room 2', there is a 'Room type' dropdown menu set to 'Other'. Below that is a 'Room name' text input field containing the placeholder text 'Customise room name'. This field is highlighted with a red border and an orange circle. At the bottom of the form, there is a '+ Add Room' button, a 'Previous' button, and a 'Next' button. A 'Default start time (Optional)' label is visible at the bottom left of the main content area.

- 20 Then click "Add room" to add the next room. Continue this till all the rooms are added.

This screenshot shows the same 'Add Template' form as the previous one, but with the 'Room name' field now containing the text 'Post Checked and Sorted' and a green checkmark. The '+ Add Room' button at the bottom is now highlighted with an orange circle. The 'Previous' and 'Next' buttons remain at the bottom right. The sidebar and menu items are the same as in the previous screenshot.

- 21 Once all the rooms are added, click "Next"

The screenshot shows a mobile application interface for adding a template. On the left is a dark blue sidebar with three menu items: '1 Details', '2 Rooms', and '3 Checks'. The 'Rooms' item is highlighted. The main content area is titled 'Add Template' and contains the following fields: 'Internal Checks' with a green checkmark, 'Room 8' with a trash icon, 'Room type' with a dropdown menu showing 'Other', and 'Room name' with a text input containing 'Fire Exits' and a green checkmark. At the bottom, there is a '+ Add Room' button, a 'Previous' button, and a 'Next' button which is highlighted with an orange circle. A small text label 'Default start time (Optional)' is visible at the bottom left of the main content area.

- 22 Now add the individual checks per room. Add the first then click "Add Check" to move on and add an additional check. continue until complete then move to the next room.

The screenshot shows the 'Add Template' form with the 'Checks' menu item highlighted in the sidebar. The form displays two sections for adding checks. The first section is titled 'Rear of Building (Room 6 of 7)' and contains 'Check 1' with a 'Check name' field containing 'Clear of Obstructions, Graffiti and Rubbish?' and a green checkmark. Below this is an 'Add Check' button highlighted with an orange circle. The second section is titled 'Internal Checks (Room 7 of 7)' and contains 'Check 1' with a 'Check name' field containing 'Customise check name' and a red warning icon.

- 23 Click the "Customise check name" field.

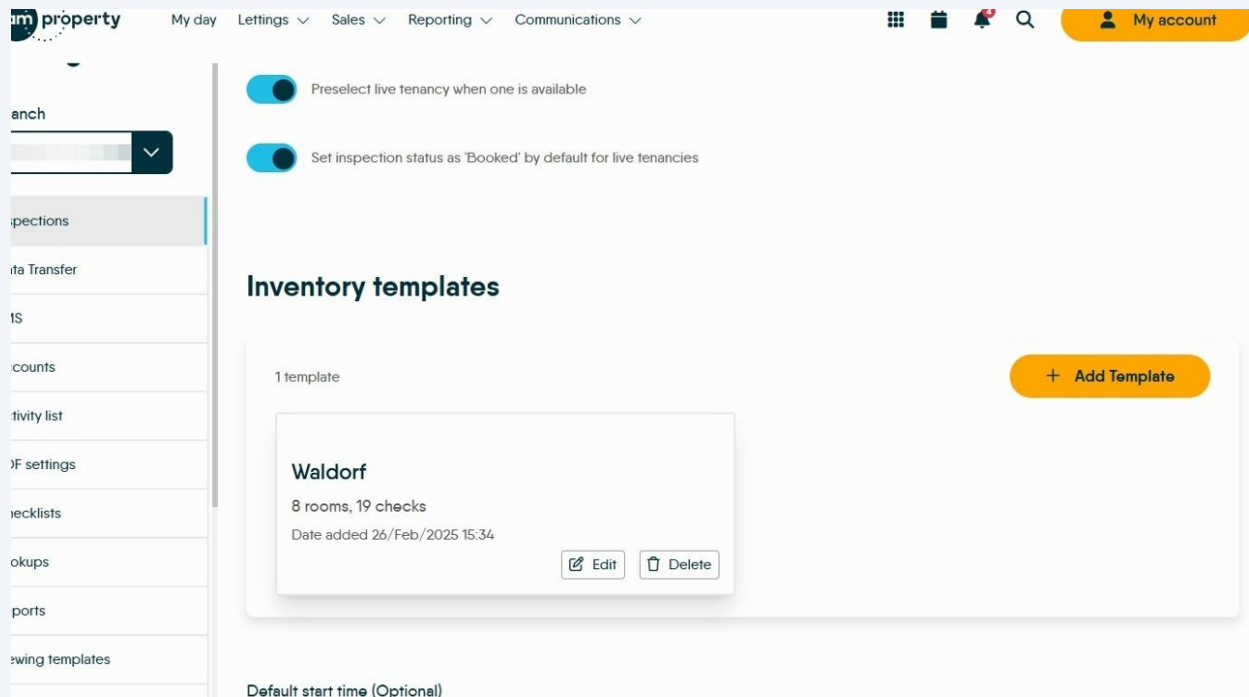
The screenshot shows the 'Add Template' modal with a sidebar on the left containing three items: '1 Details', '2 Rooms', and '3 Checks'. The main content area is titled 'Rear of Building (Room 6 of 7)' and contains two check items. 'Check 1' has a 'Check name' field with the text 'Clear of Obstructions, Graffiti and Rubbish?' and a green checkmark. 'Check 2' has a 'Check name' field with the text 'Customise check name' and a red outline with an exclamation mark icon. An orange circle highlights the 'Customise check name' text. At the bottom of the modal, there is a 'Default start time (Optional)' field with the value '09:00' and a clock icon, and a 'Default inspection duration' field.

- 24 Once all Rooms and Checks are added, click 'Add Template'

The screenshot shows the 'Add Template' modal with the same sidebar. The main content area now shows a completed check: 'No Electronic Bicycles, Scooter, Mobility Scooters etc Should Not b' with a green checkmark. Below this is an 'Add Check' button. The next section is titled 'Fire Exits (Room 8 of 8)' and contains 'Check 1' with a 'Check name' field containing 'Clear of Obstruction' and a green checkmark. Below this is another 'Add Check' button. At the bottom of the modal, there are two buttons: 'Previous' and 'Add Template'. The 'Add Template' button is highlighted with an orange circle. Below the modal, the 'Default start time (Optional)' field shows '09:00' and the 'Default inspection duration' field is visible.

25

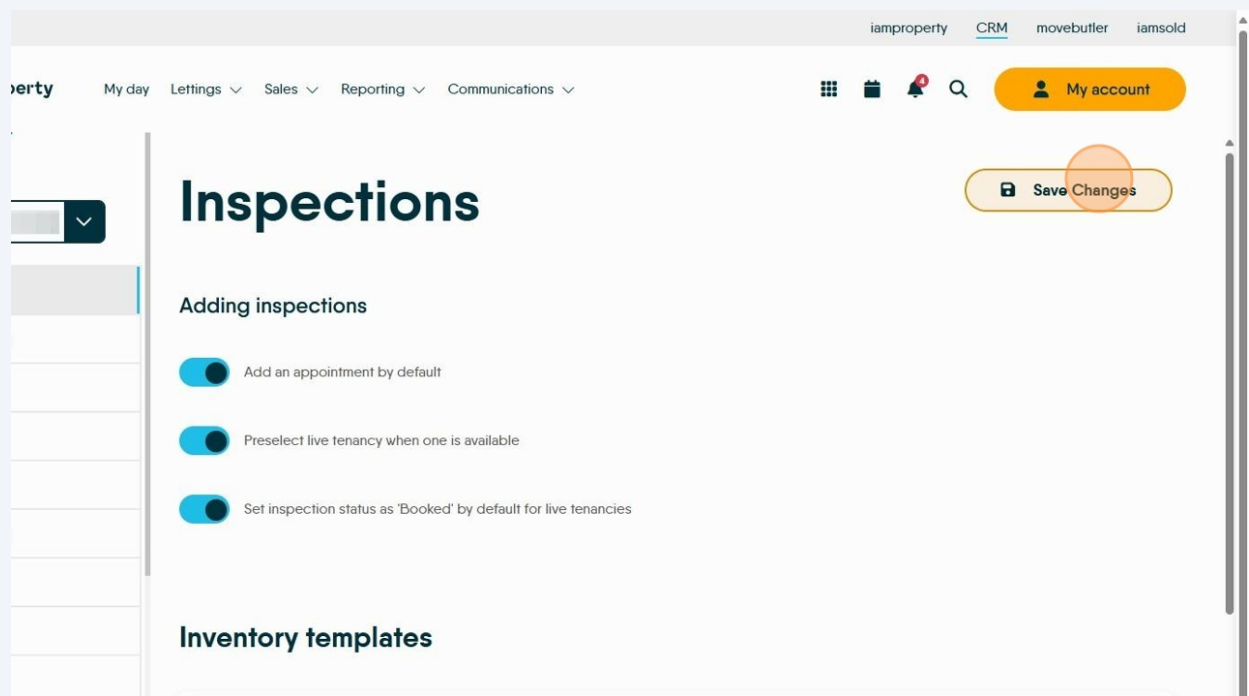
The template you have just created will show on the screen, named and showing the number of rooms and checks you have created.



The screenshot shows the 'Inventory templates' section of the iamproperty CRM. The left sidebar contains a list of navigation items: 'anch', 'Inspections', 'Data Transfer', 'IS', 'counts', 'Activity list', 'OF settings', 'checklists', 'okups', 'ports', and 'wing templates'. The main content area has a toggle switch for 'Preselect live tenancy when one is available' and another for 'Set inspection status as "Booked" by default for live tenancies'. Below these is the 'Inventory templates' section, which displays a list of templates. One template is shown: 'Waldorf', which has 8 rooms and 19 checks, and was added on 26/Feb/2025 at 15:34. There are 'Edit' and 'Delete' buttons for this template. An 'Add Template' button is also visible. At the bottom, there is a 'Default start time (Optional)' field.

26

Click "Save changes"



The screenshot shows the 'Inspections' section of the iamproperty CRM. The left sidebar contains a list of navigation items: 'anch', 'Inspections', 'Data Transfer', 'IS', 'counts', 'Activity list', 'OF settings', 'checklists', 'okups', 'ports', and 'wing templates'. The main content area has a toggle switch for 'Add an appointment by default' and another for 'Preselect live tenancy when one is available'. Below these is the 'Inventory templates' section, which displays a list of templates. One template is shown: 'Waldorf', which has 8 rooms and 19 checks, and was added on 26/Feb/2025 at 15:34. There are 'Edit' and 'Delete' buttons for this template. An 'Add Template' button is also visible. At the bottom, there is a 'Default start time (Optional)' field.