

Adding an Inspection Appointment to the CRM Inspections Module

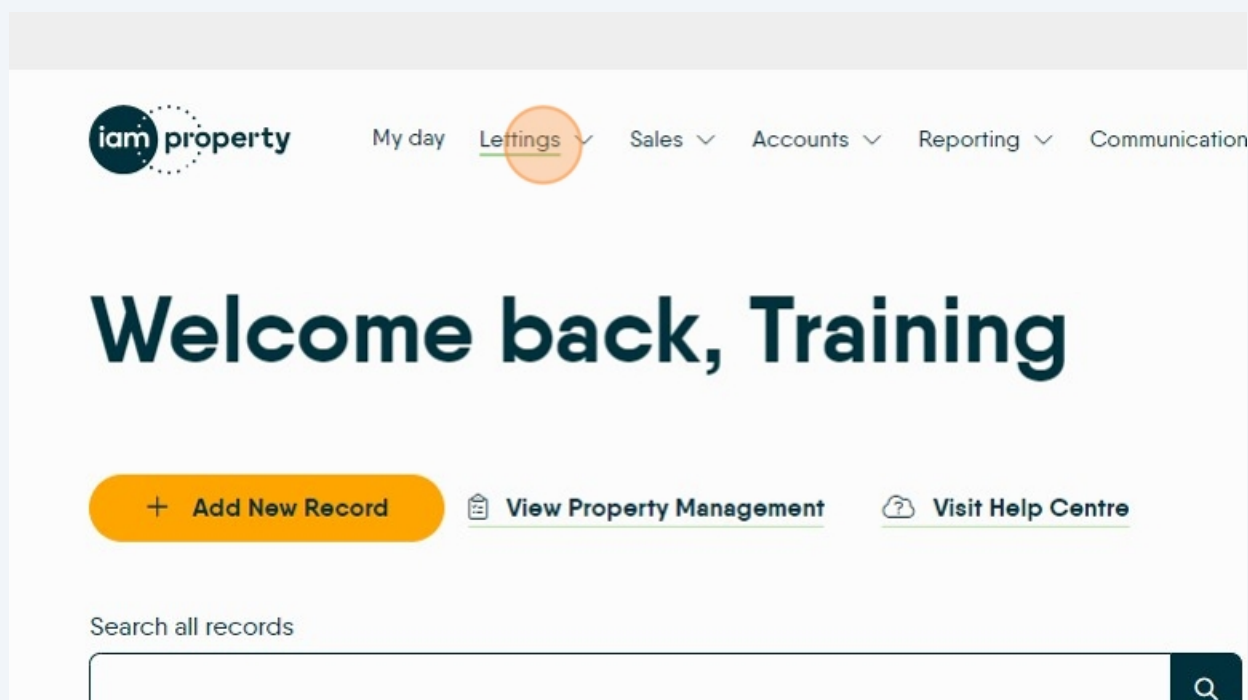


This guide provides a step-by-step process for efficiently adding inspections to the CRM Inspections module, ensuring that users can manage property inspections seamlessly.

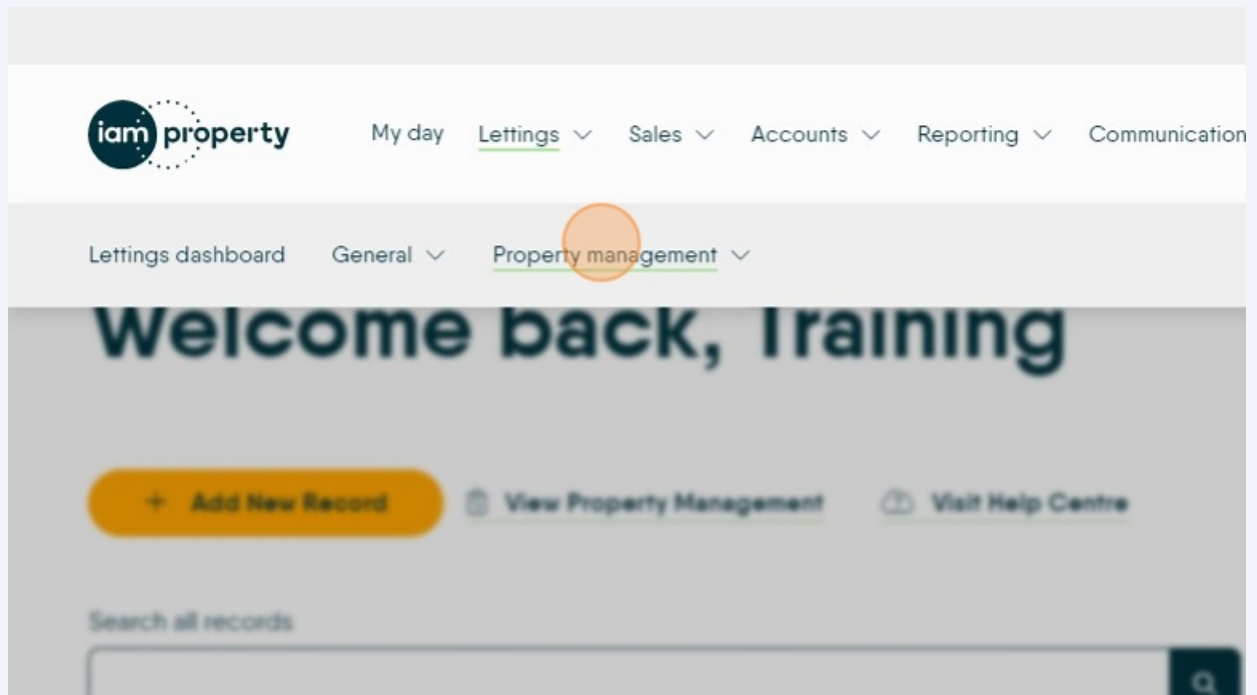
By following these instructions, users can streamline their workflow, enhance organisation, and improve communication regarding property management.

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

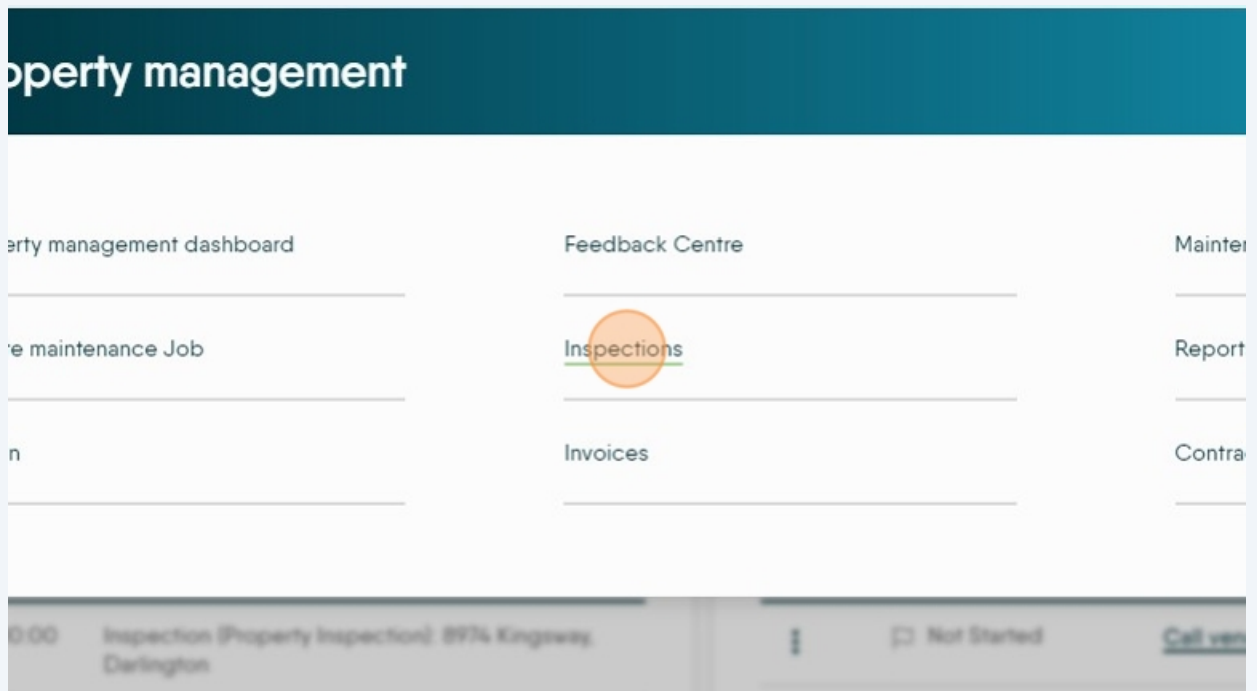
- 2 Click "Lettings"



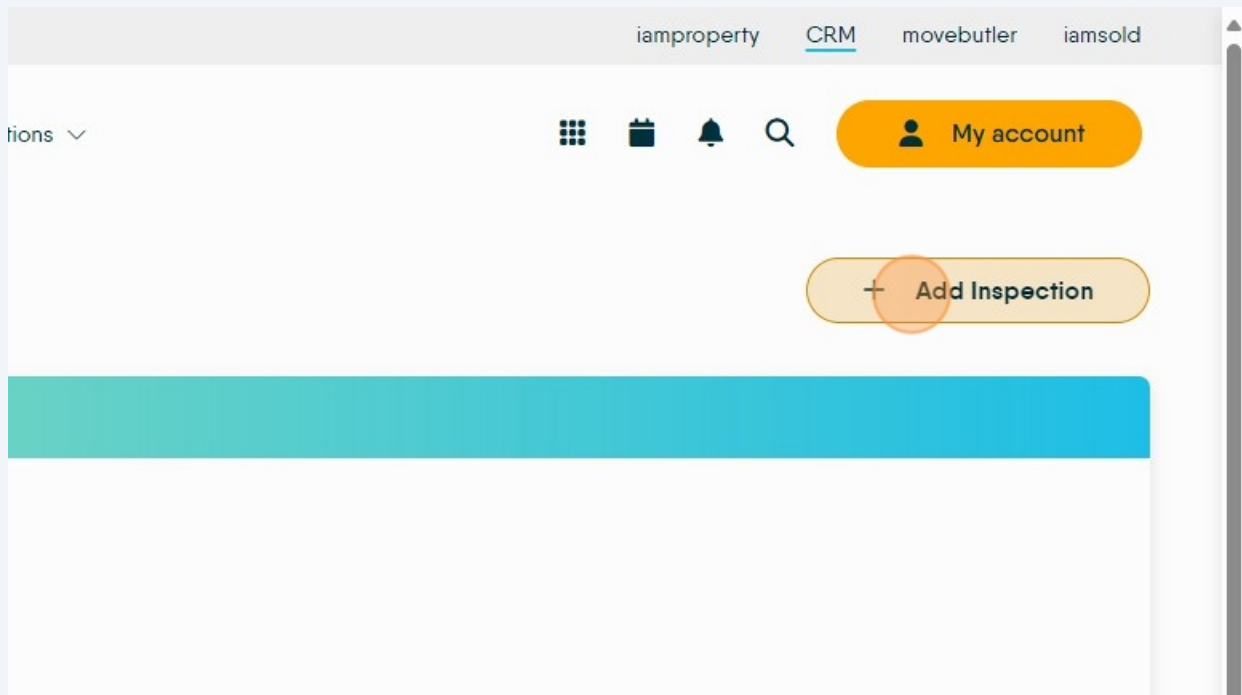
3 Click "Property management"



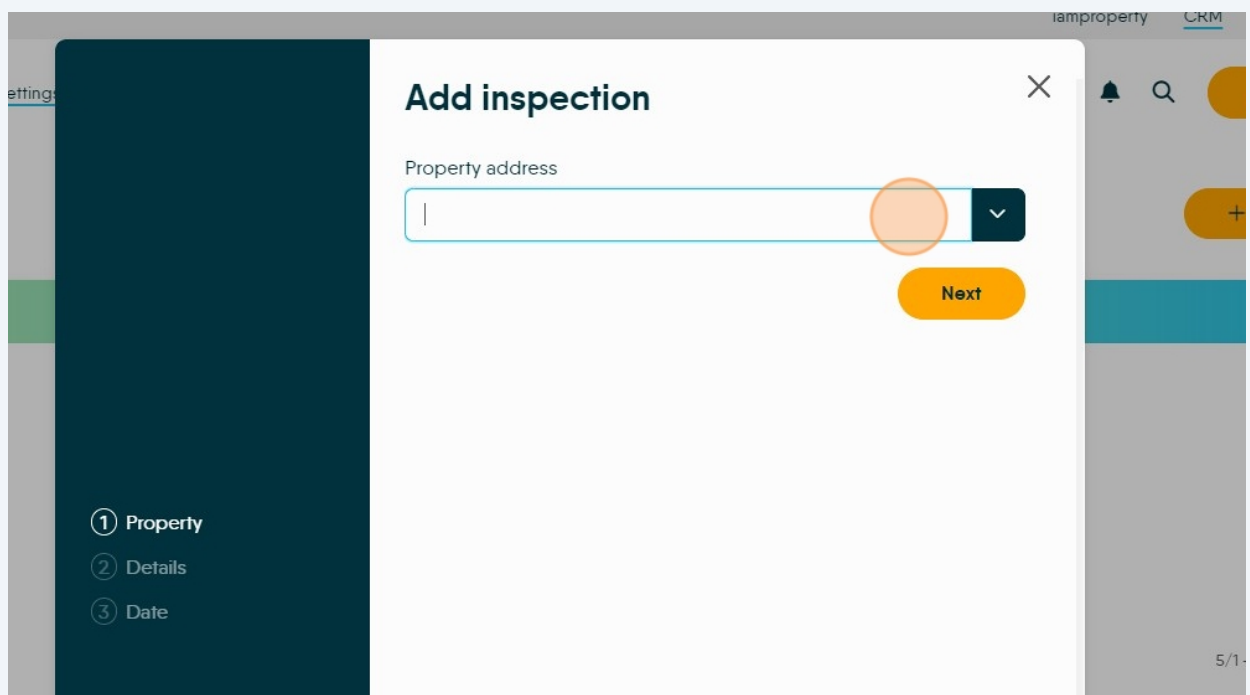
4 Click "Inspections"



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

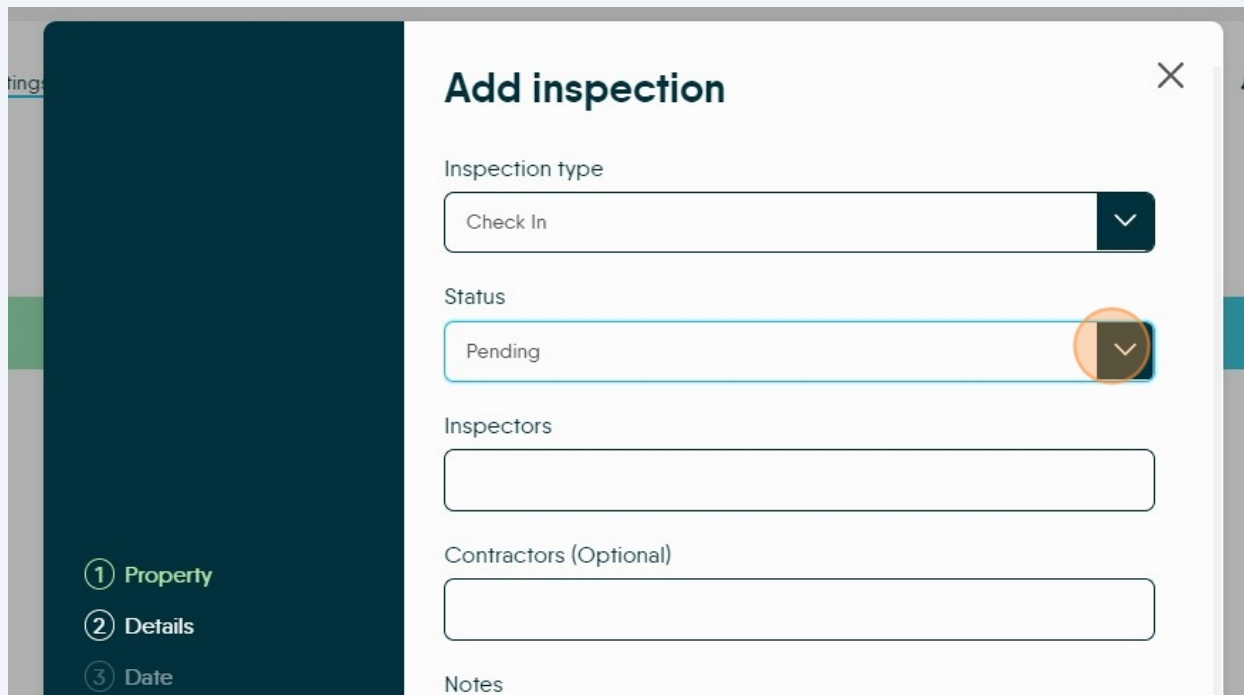
Contractors (Optional)

Notes

① Property
② Details
③ Date

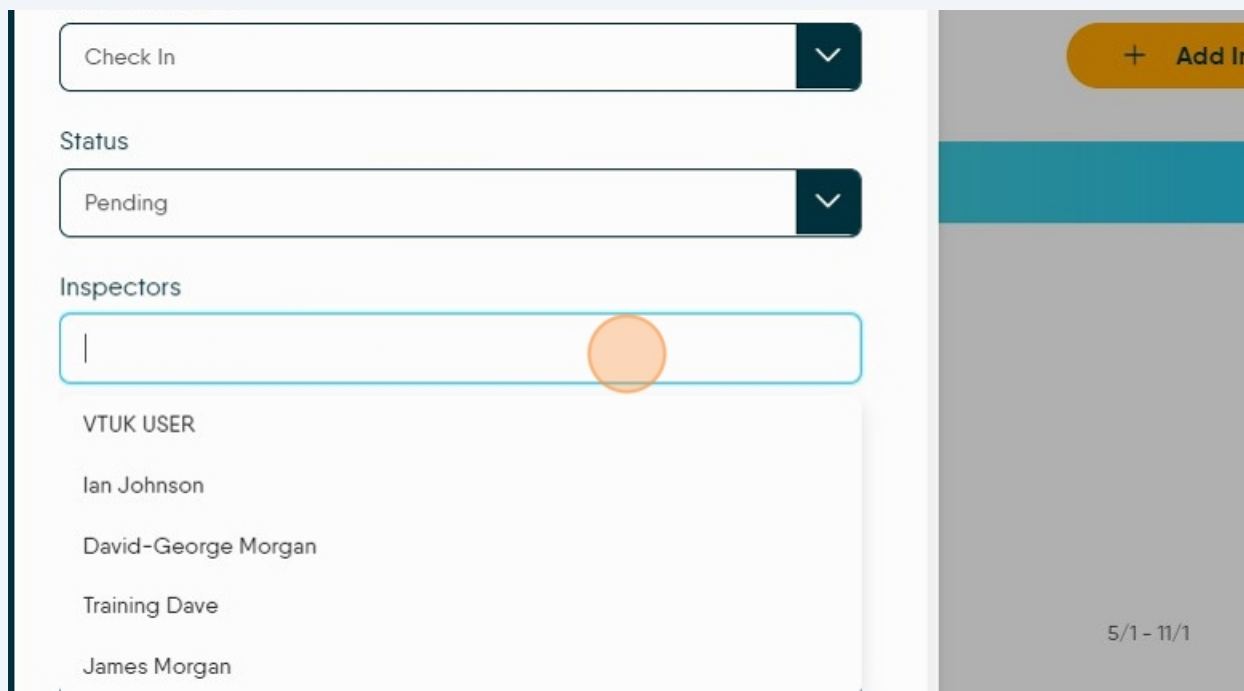
9 Select the 'Status' option for the Inspection.

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'), 'Inspectors' (empty), 'Contractors (Optional)' (empty), and 'Notes' (empty). The 'Status' dropdown menu is highlighted with an orange circle, indicating it is the current step in the process.

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



This screenshot shows the 'Add inspection' form with the 'Inspectors' dropdown menu open. The dropdown list displays the following names: 'VTUK USER', 'Ian Johnson', 'David-George Morgan', 'Training Dave', and 'James Morgan'. The 'Inspectors' field is highlighted with an orange circle. To the right of the form, a partial view of another screen shows 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 blue header with a dropdown menu showing 'Pending'. Below this are three sections: 'Inspectors' with a list of 'Training Dave' and 'VTUK USER' (each with an 'X' to remove); 'Contractors (Optional)' with an empty input field; and 'Notes' with a text area containing the placeholder 'Enter notes'. At the bottom left is a checkbox labeled 'Apply inventory template (optional)'. At the bottom right are two buttons: 'Previous' and 'Next'. An orange circle highlights the 'Contractors (Optional)' input field. On the far right, a grey sidebar shows a page number '5/1 - 1'.

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.

Training Dave X VTUK USER X

Contractors (Optional)

Notes

Enter notes

☐ Apply inventory template (optional)

Previous Next

13

Click "Next"

Notes

Enter notes

☐ Apply inventory template (optional)

Previous Next

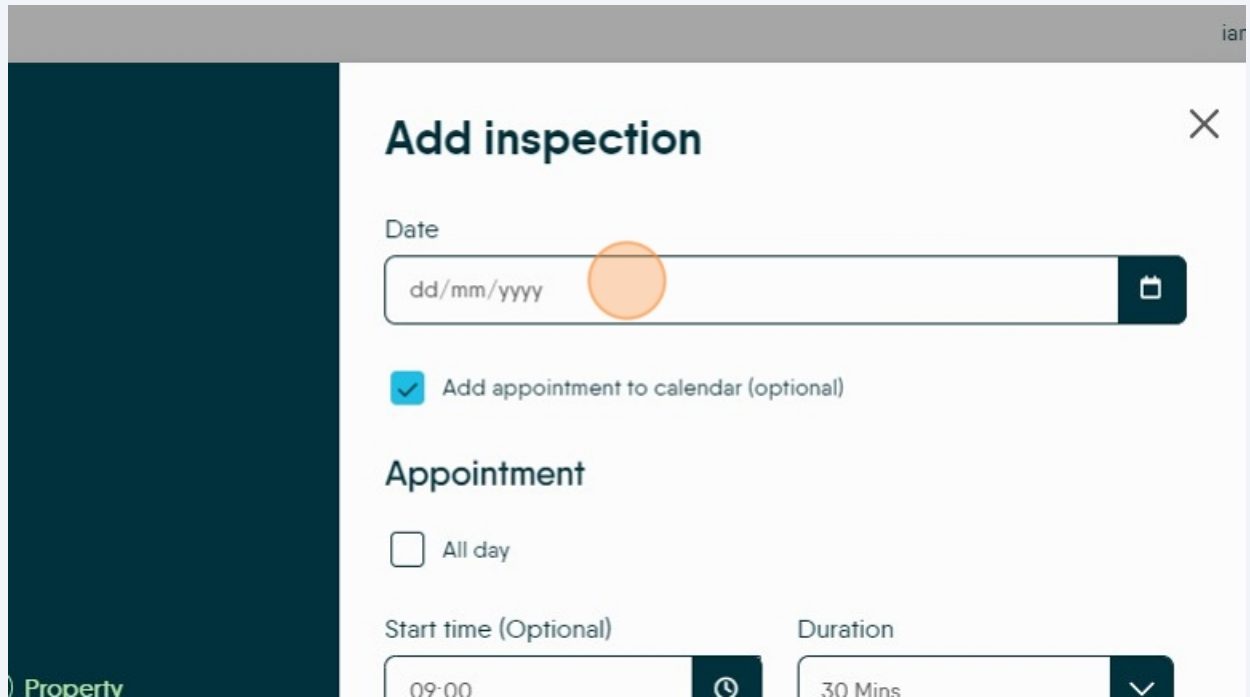
6 Completed

Cancelled

14

To create the Inspection record Click the "Date" field and add the date of the Inspections. 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 is a "Date" label followed by a text input field containing the placeholder "dd/mm/yyyy". An orange circle highlights the right side of this input field, specifically the area containing a 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". Below the header 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, there is an "All day" checkbox which is unchecked. The "Start time (Optional)" field is highlighted with an orange circle and contains the text "09:00". To its right is a "Duration" field containing "30 Mins". Below the start time field is an "End time" field containing "09:30". At the bottom right, there are two buttons: "Previous" and "Submit".

- 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" field is highlighted with an orange circle, and a dropdown menu is open below it, showing three options: "15 Mins", "30 Mins", and "45 Mins". The "30 Mins" option is currently selected. The "Start time (Optional)" field contains "09:00" and the "End time" field contains "09:30". The sidebar on the left is still visible with "1 Property", "2 Details", and "3 Date".

17 Click "Submit"

13/12/2024

☒ Add appointment to calendar (optional)

Appointment

☐ All day

Start time (Optional) 09:00

Duration 30 Mins

End time 09:30

Previous Submit

+ Add Inspection

5/1 - 11/1

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