

Creating a Property Inspection Appointment in CRM



This guide simplifies the process of creating a property inspection appointment within a CRM system.

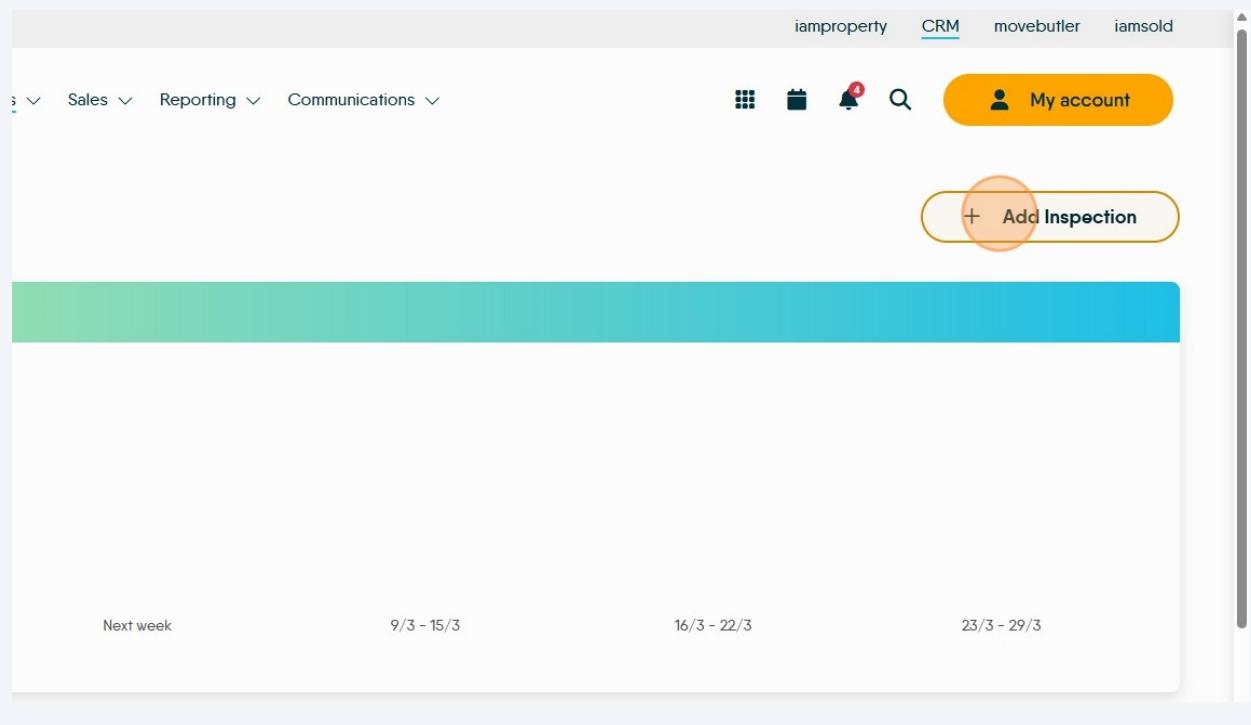
It provides a step-by-step approach that ensures even those unfamiliar with the system can easily navigate and complete the task.

By following these instructions, users can streamline their workflow, saving time and reducing errors in scheduling inspections. Overall, it's a valuable resource for enhancing productivity in property-related tasks.

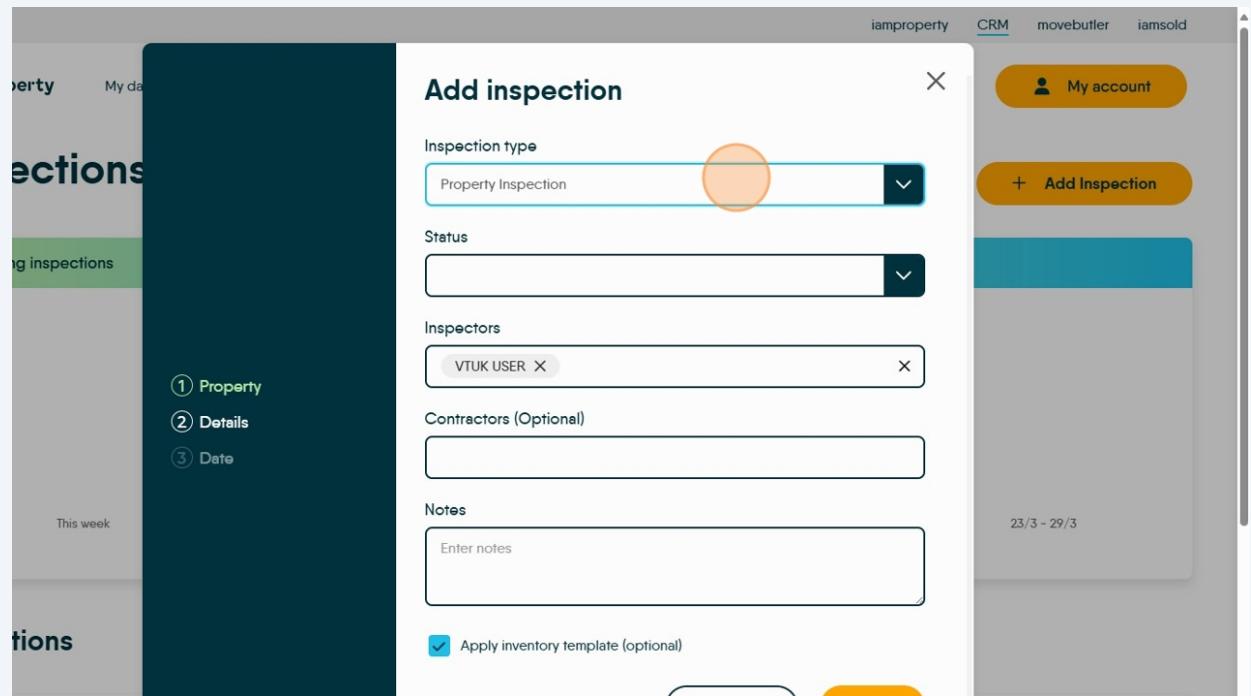
- 1 Navigate to <https://crm.iamproperty.com/InspectionsV2/Dashboard>

A screenshot of the iam property CRM software interface. The top navigation bar includes the logo, 'My day', 'Lettings', 'Sales', 'Reporting', 'Communications', and a yellow 'My acc' button. Below the navigation is a search bar with a magnifying glass icon. A prominent green button on the right says '+ Add Inspe'. The main area is titled 'Inspections' and features a 'Upcoming inspections' section with a teal header. Below this, there are six time-based filters: '0', 'This week', 'Next week', '9/3 - 15/3', '16/3 - 22/3', and '23/3 - 29/3'. At the bottom, there is a 'Search' input field and a 'Clear' button.

2 Click "Add inspection"

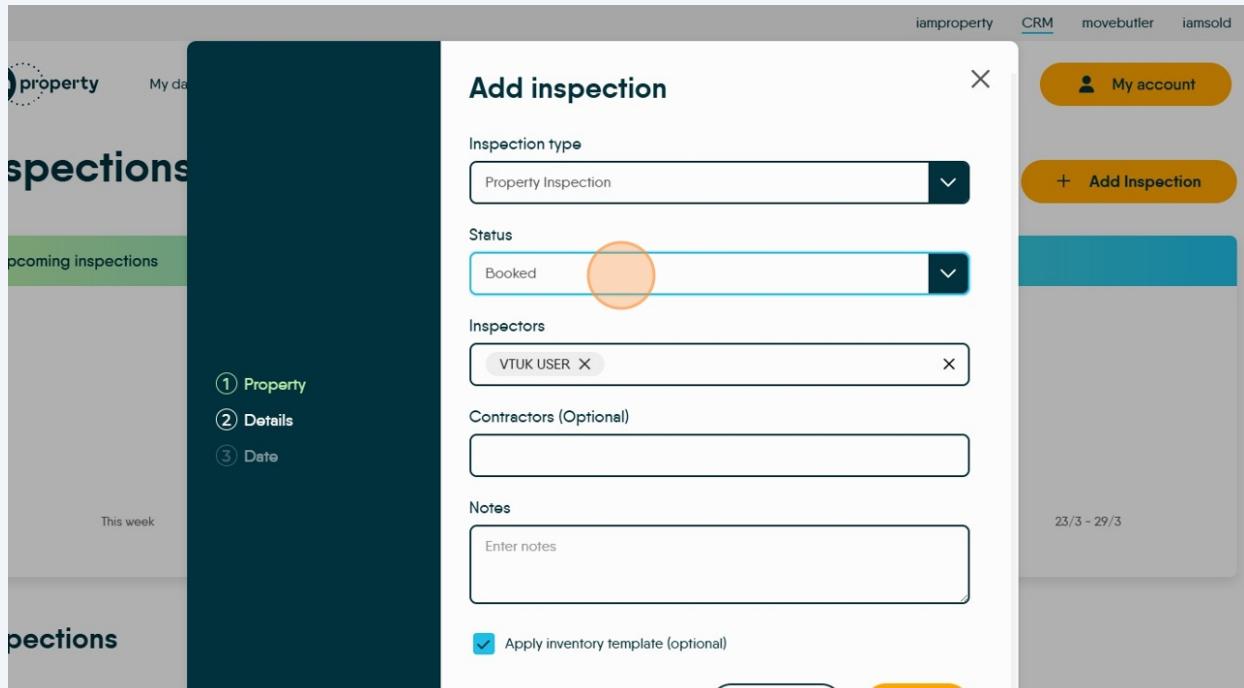


3 Select the "Property Inspection" option and pick the Inspection type from the drop down list.



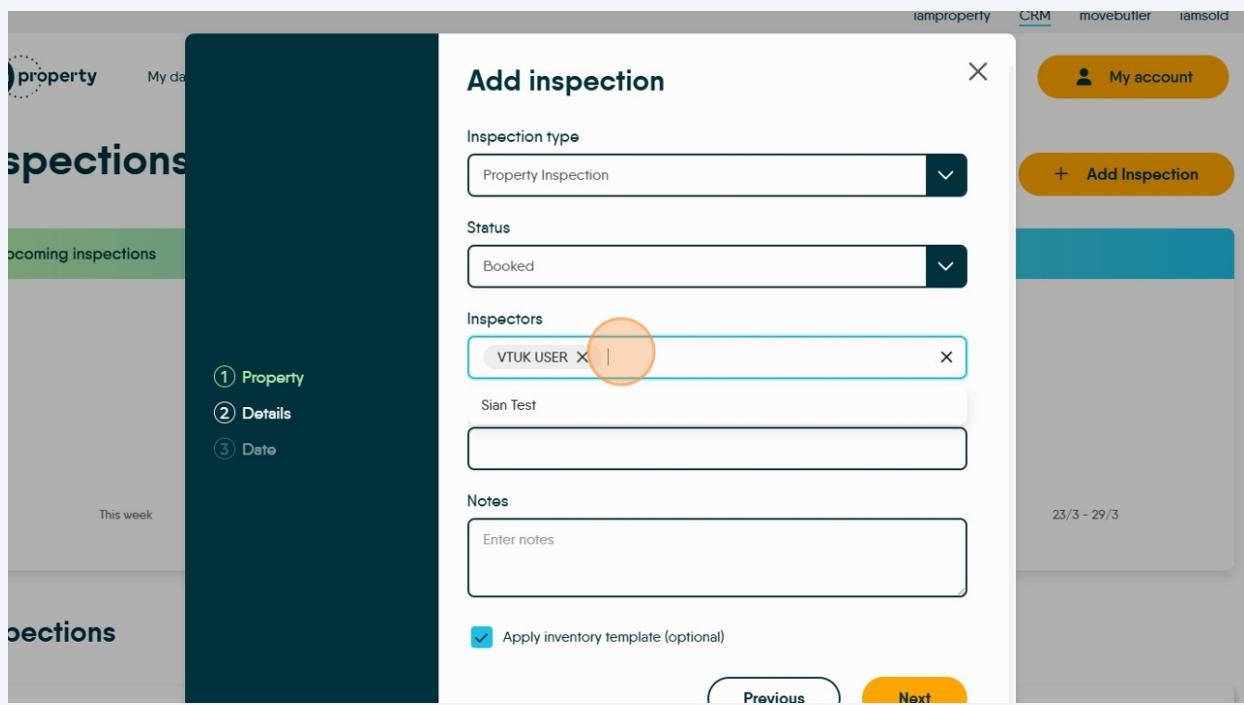
4

Select the "Status" from the drop down list. This option can be set to automatically show as booked if the property being inspected has a current tenant, via the Inspections configuration.

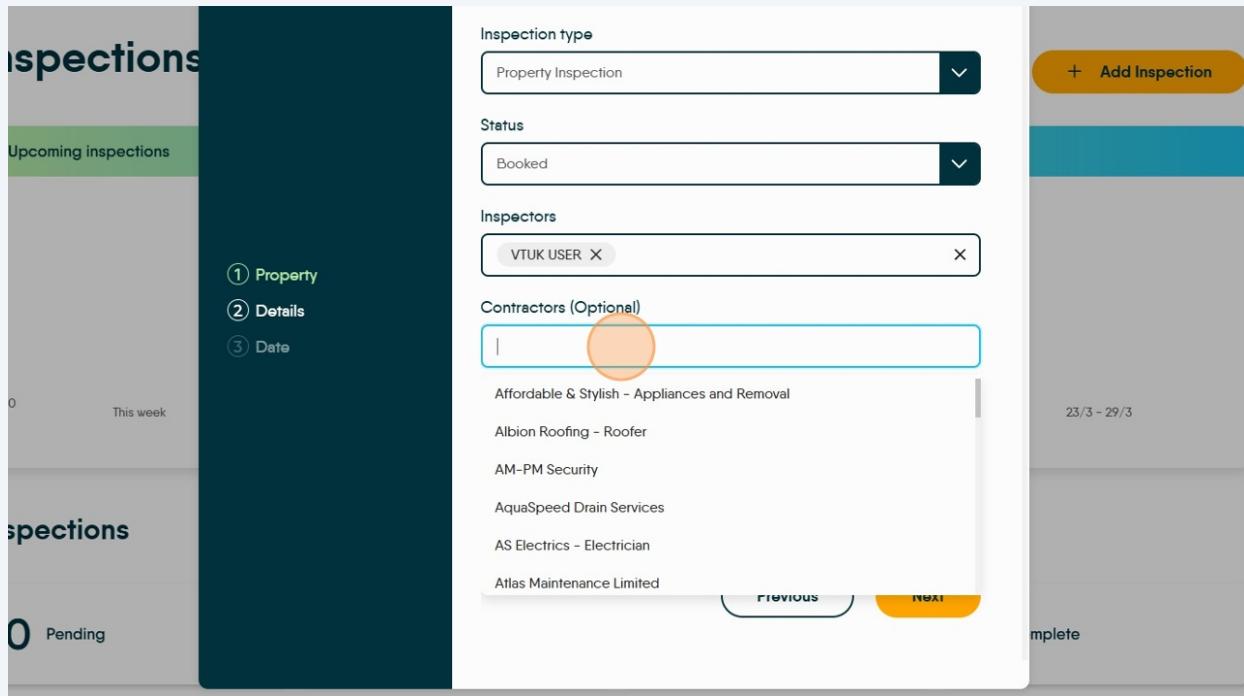


5

Click "Inspectors" and pick the Inspector from the list of your staff.

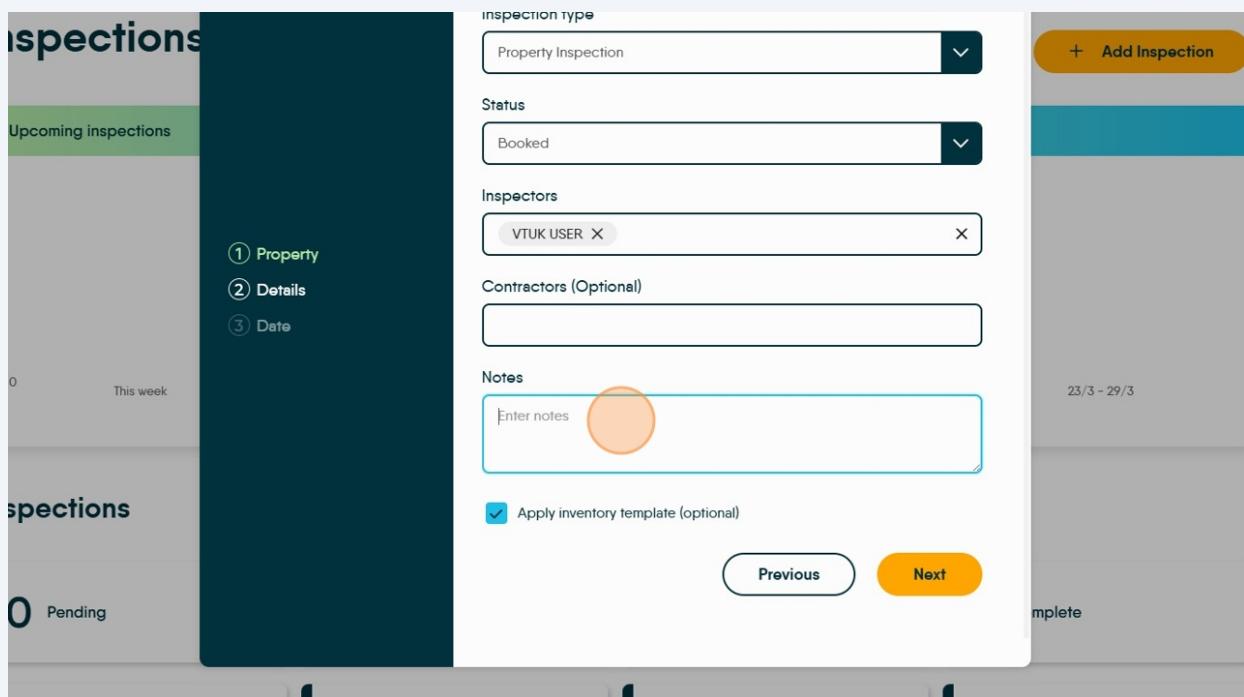


6 Click "Contractors" to select a Contractor to accompany you on the visit. This is optional.



The screenshot shows the 'Inspections' section of a mobile application. On the left, there are two tabs: 'Upcoming inspections' (selected) and 'Pending'. The main area is titled 'Inspections' and shows three steps: '① Property', '② Details', and '③ Date'. Step 1 is completed. Step 2 is in progress, indicated by a dark blue background. Step 3 is not yet started. The 'Details' step contains several input fields: 'Inspection type' (Property Inspection), 'Status' (Booked), 'Inspectors' (VTUK USER), and 'Contractors (Optional)'. The 'Contractors (Optional)' field is highlighted with an orange circle. Below this field is a list of contractors: Affordable & Stylish - Appliances and Removal, Albion Roofing - Roofer, AM-PM Security, AquaSpeed Drain Services, AS Electrics - Electrician, and Atlas Maintenance Limited. At the bottom are 'Previous' and 'Next' buttons, and a 'Complete' button on the right.

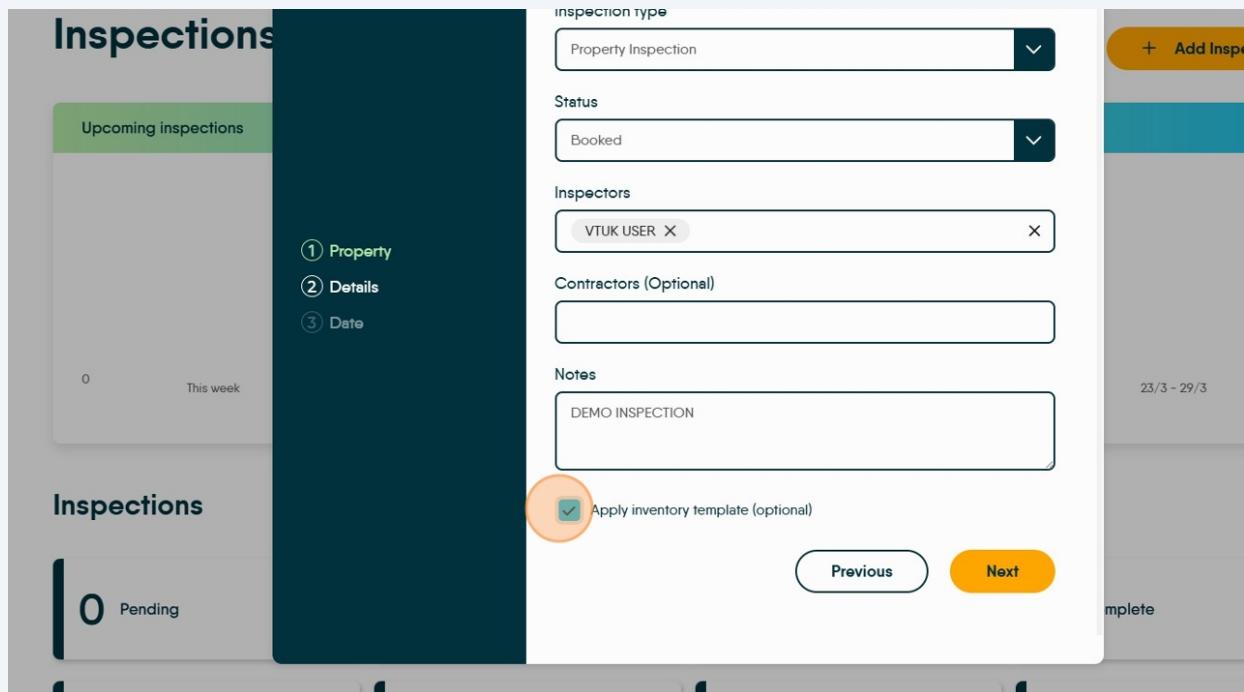
7 Click the "Notes" field to add any inspection notes.



The screenshot shows the 'Inspections' section of a mobile application, similar to the previous one but with a different step highlighted. The 'Upcoming inspections' tab is selected. The main area is titled 'Inspections' and shows three steps: '① Property', '② Details', and '③ Date'. Step 1 is completed. Step 2 is in progress, indicated by a dark blue background. Step 3 is not yet started. The 'Details' step contains several input fields: 'Inspection type' (Property Inspection), 'Status' (Booked), 'Inspectors' (VTUK USER), and 'Contractors (Optional)'. Below these is a 'Notes' field, which is highlighted with an orange circle. The 'Notes' field contains the placeholder text 'Enter notes'. At the bottom are 'Previous' and 'Next' buttons, and a 'Complete' button on the right.

8

If you want to add an Inspection Template at this point. Click "Apply inventory template (optional)" and then click the "Select which template you'd like to apply:" and search for the template you want to use.



Upcoming inspections

0 This week

Inspections

0 Pending

① Property
② Details
③ Date

inspection type: Property Inspection

Status: Booked

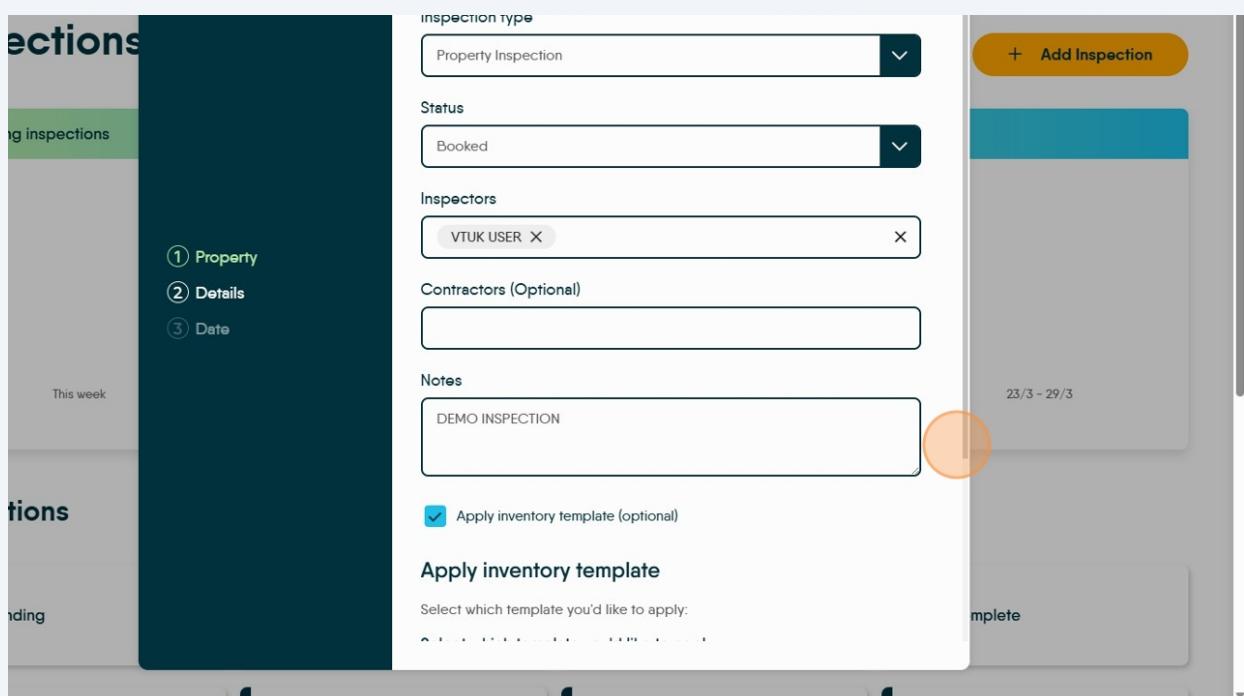
Inspectors: VTUK USER X

Contractors (Optional):

Notes: DEMO INSPECTION

Apply inventory template (optional)

Previous Next



Upcoming inspections

0 This week

Inspections

0 Pending

① Property
② Details
③ Date

inspection type: Property Inspection

Status: Booked

Inspectors: VTUK USER X

Contractors (Optional):

Notes: DEMO INSPECTION

Apply inventory template (optional)

Apply inventory template

Select which template you'd like to apply:

Previous Next

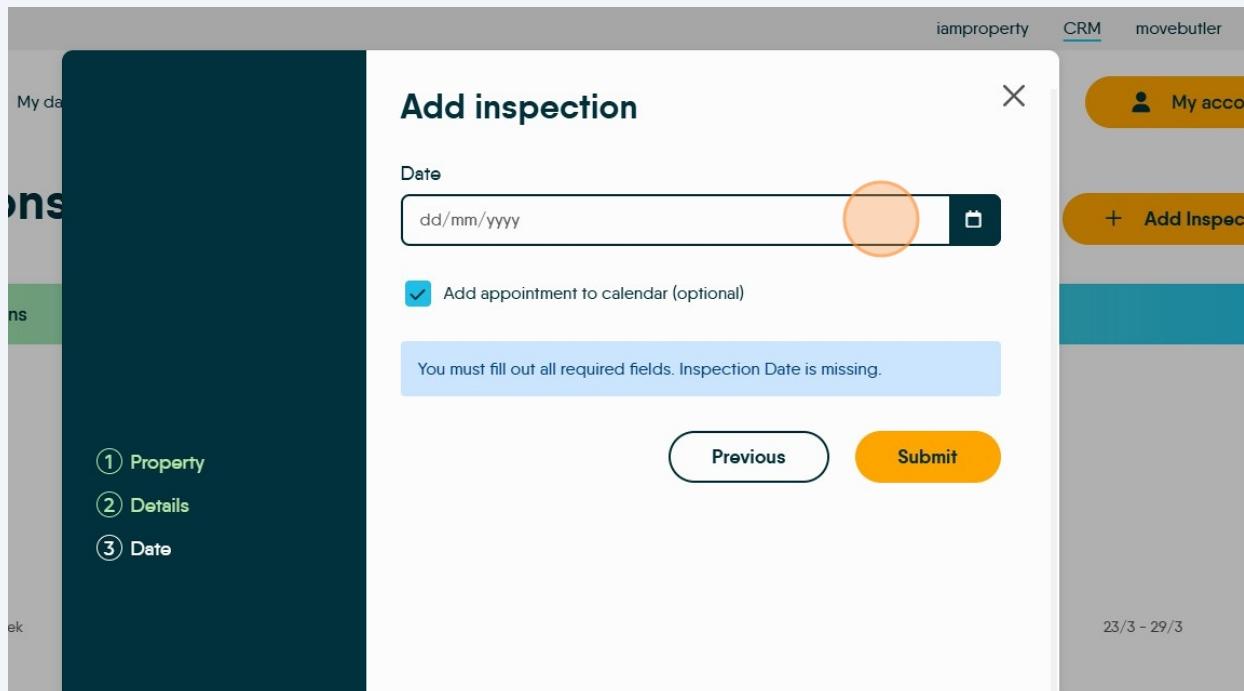
This screenshot shows the 'Apply inventory template' step in the inspection booking process. The left sidebar shows 'This week' and 'Upcoming' sections. The main area has steps 1 (Property), 2 (Details), and 3 (Date) listed vertically. The 'Details' step is active, showing fields for 'Contractors (Optional)', 'Notes' (containing 'DEMO INSPECTION'), and a checked 'Apply inventory template (optional)' checkbox. A sub-section titled 'Apply inventory template' asks to select a template, with a search bar and a 'Search' button. Below it, a message says 'No templates found' and 'Please try changing your search.' Navigation buttons 'Previous' and 'Next' are at the bottom.

9 Click "Next"

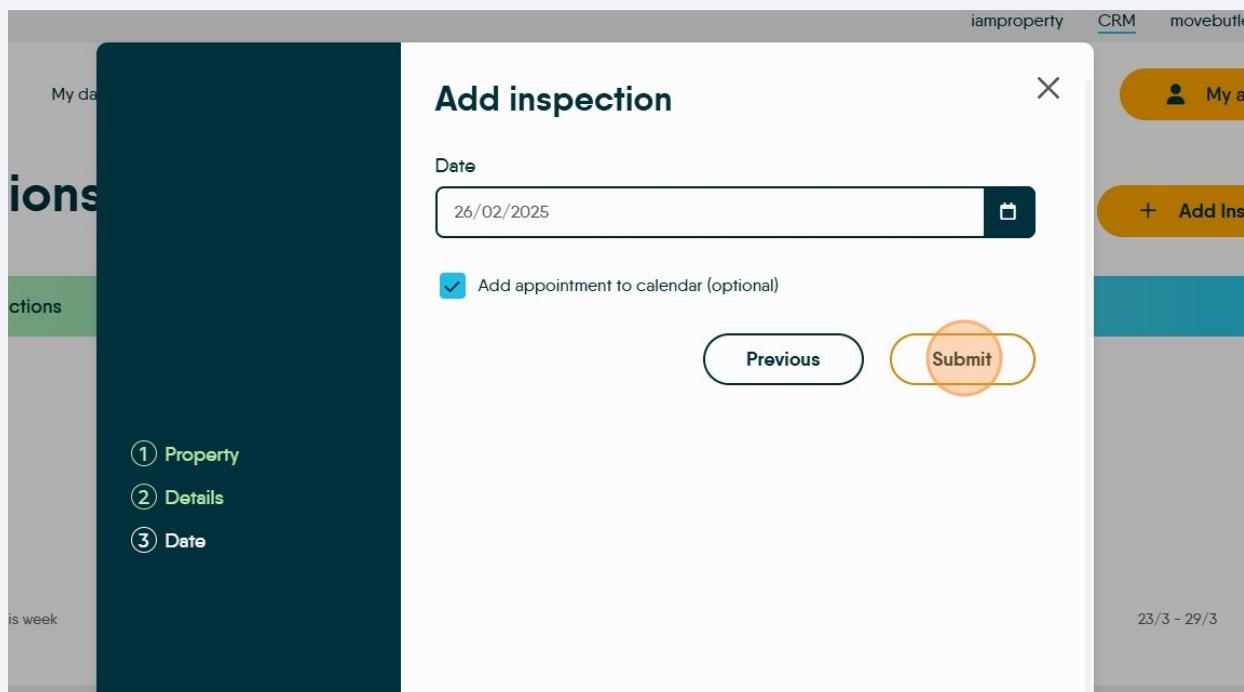
This screenshot shows the 'Details' step of the inspection booking process. The left sidebar shows 'This week' and 'Upcoming' sections. The main area has steps 1 (Property), 2 (Details), and 3 (Date) listed vertically. The 'Details' step is active, showing fields for 'Status' (set to 'Booked'), 'Inspectors' (listing 'VTUK USER X'), 'Contractors (Optional)', 'Notes' (containing 'DEMO INSPECTION'), and an unchecked 'Apply inventory template (optional)' checkbox. The 'Next' button at the bottom is highlighted with an orange circle. Navigation buttons 'Previous' and 'Next' are at the bottom.

10 Click the "Date" field to add the date of the visit to the planned inspection.

This date could be an indicator of when the inspection is due. If the 'Add appointment to calendar' option is selected then you will be asked to set a time, calendar and Inspector so the Inspection can be planned into the calendar.

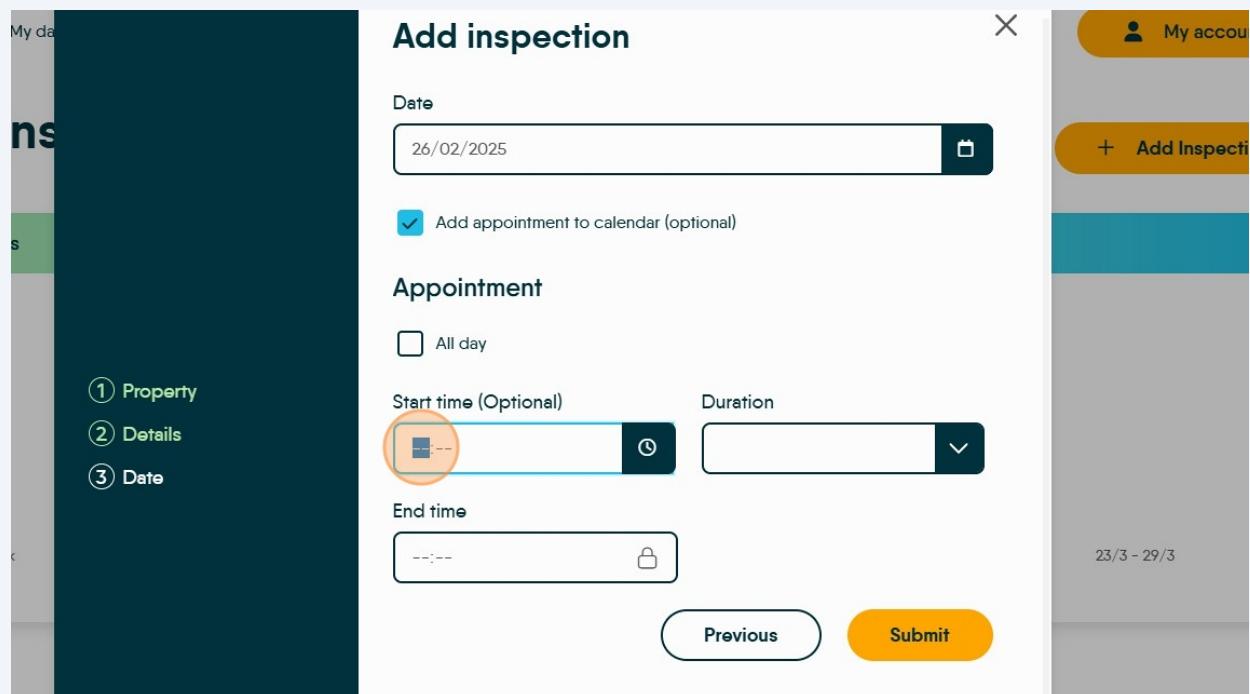


11 Click "Submit" if not adding to the calendar



12 If adding to the Calendar . Click the "Start time" field.

You can opt to set the Appointment in the calendar for All Day if required by selecting the All Day option.
Select the Duration from the drop down menu.
Click "Submit"



Add inspection

Date: 26/02/2025

Add appointment to calendar (optional)

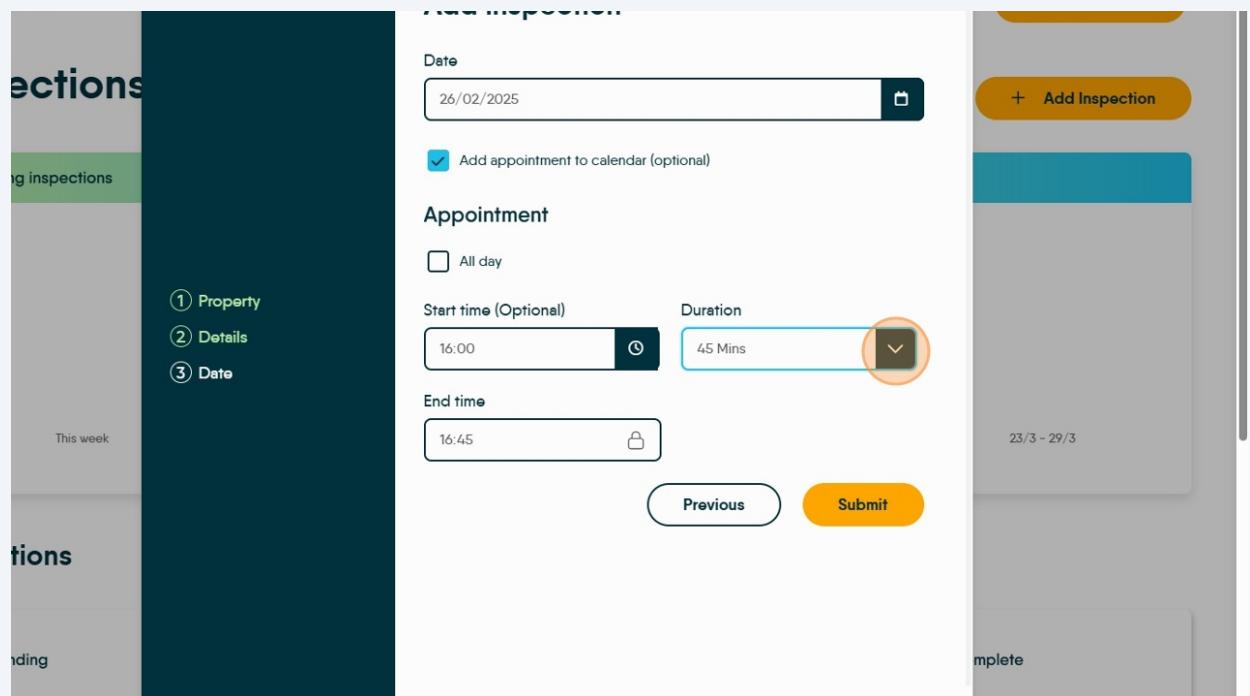
Appointment

All day

Start time (Optional):

Duration:

End time:



Add inspection

Date: 26/02/2025

Add appointment to calendar (optional)

Appointment

All day

Start time (Optional):

Duration:

End time:

