

# Creating a Property Inspection Appointment in CRM

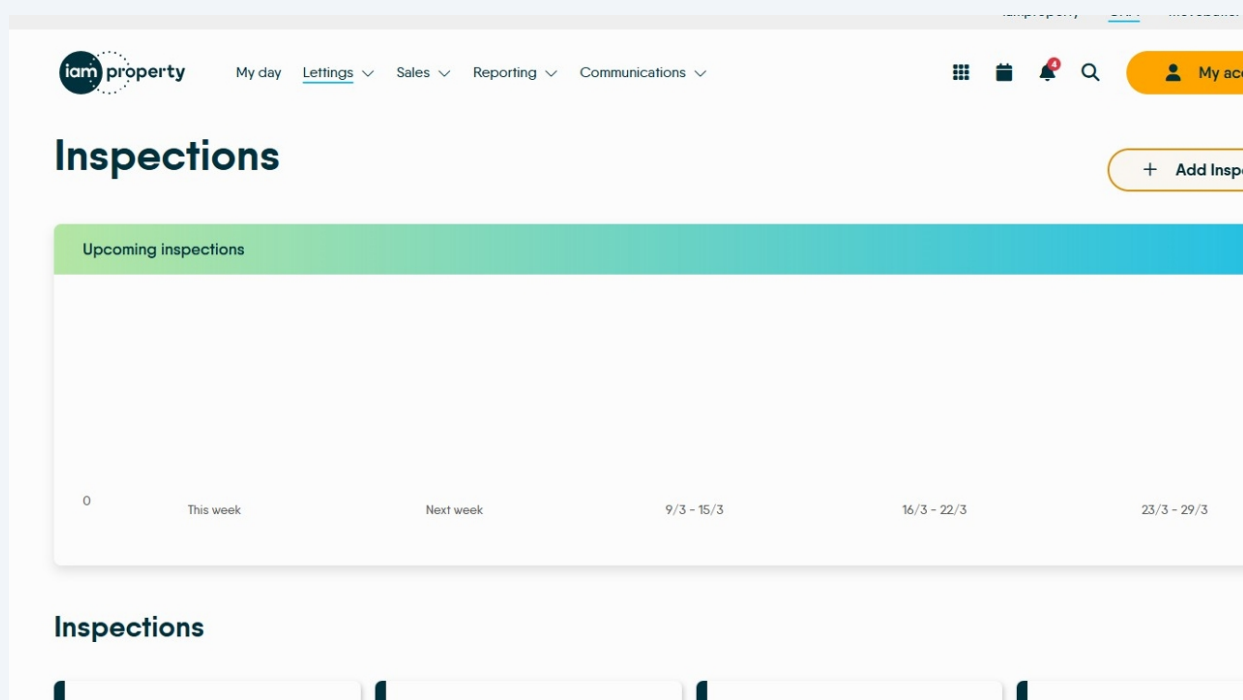


This guide simplifies the process of creating a property inspection appointment within a CRM system.

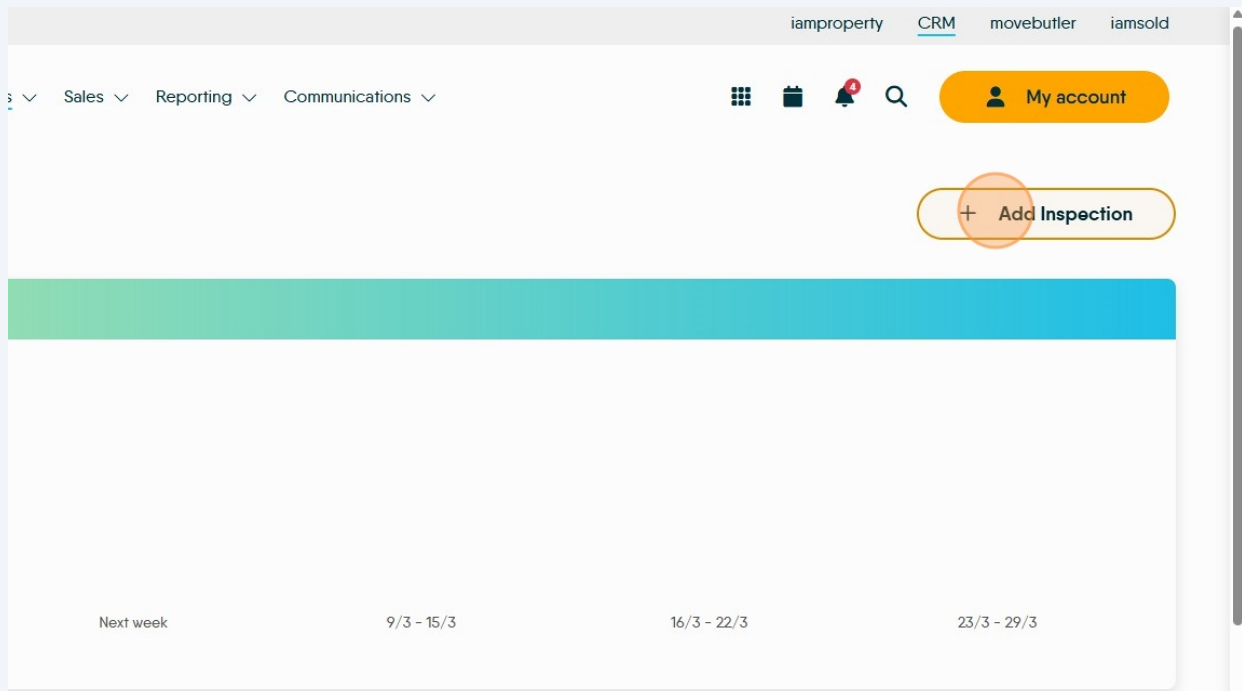
It provides a step-by-step approach that ensures even those unfamiliar with the system can easily navigate and complete the task.

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.

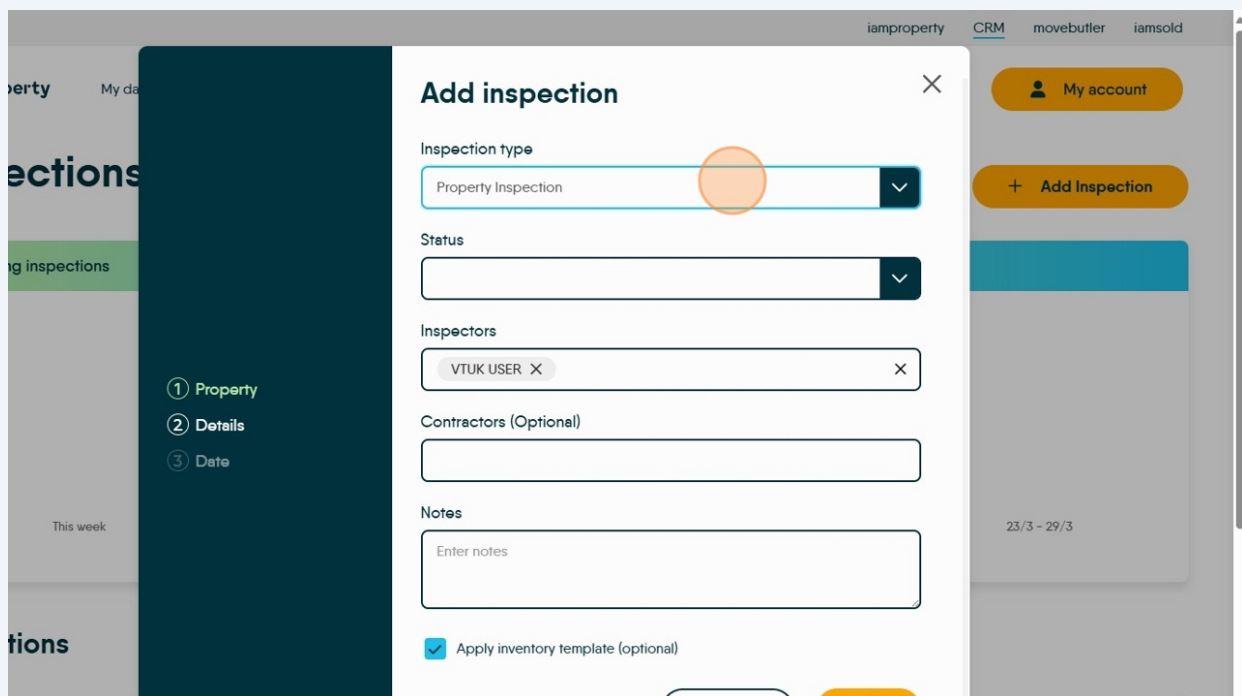
- 1 Navigate to <https://crm.iamproperty.com/InspectionsV2/Dashboard>



## 2 Click "Add inspection"

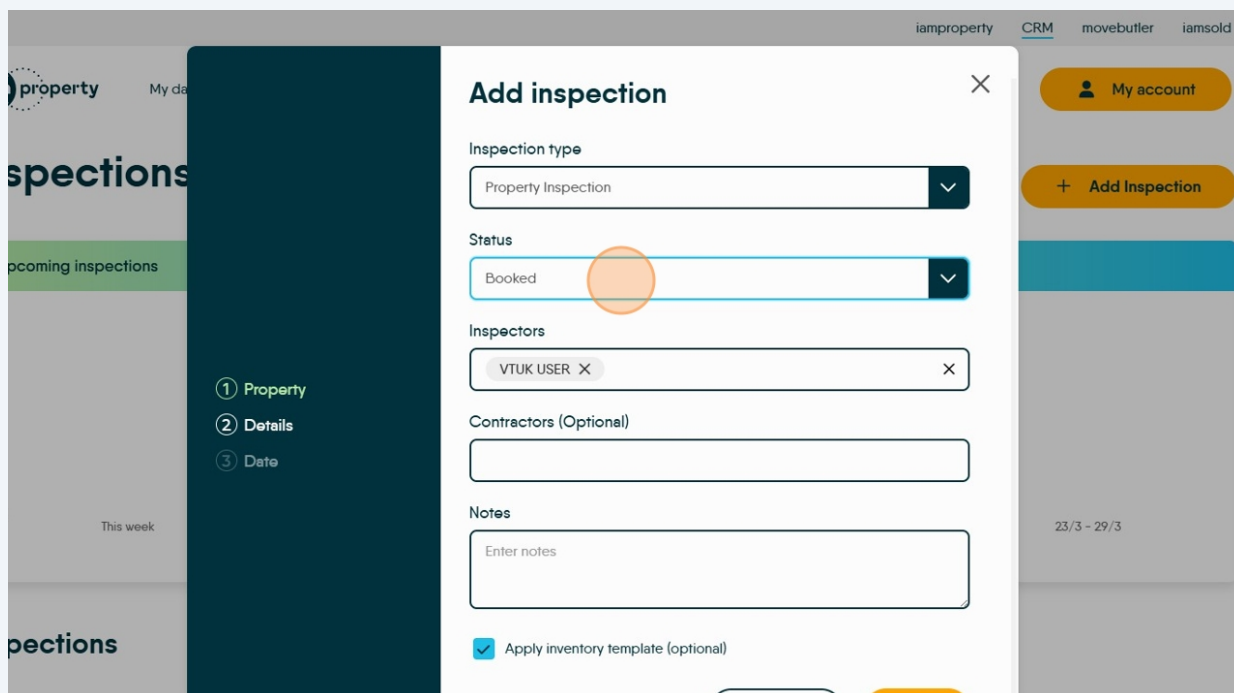


## 3 Select the "Property Inspection" option and pick the Inspection type from the drop down list.



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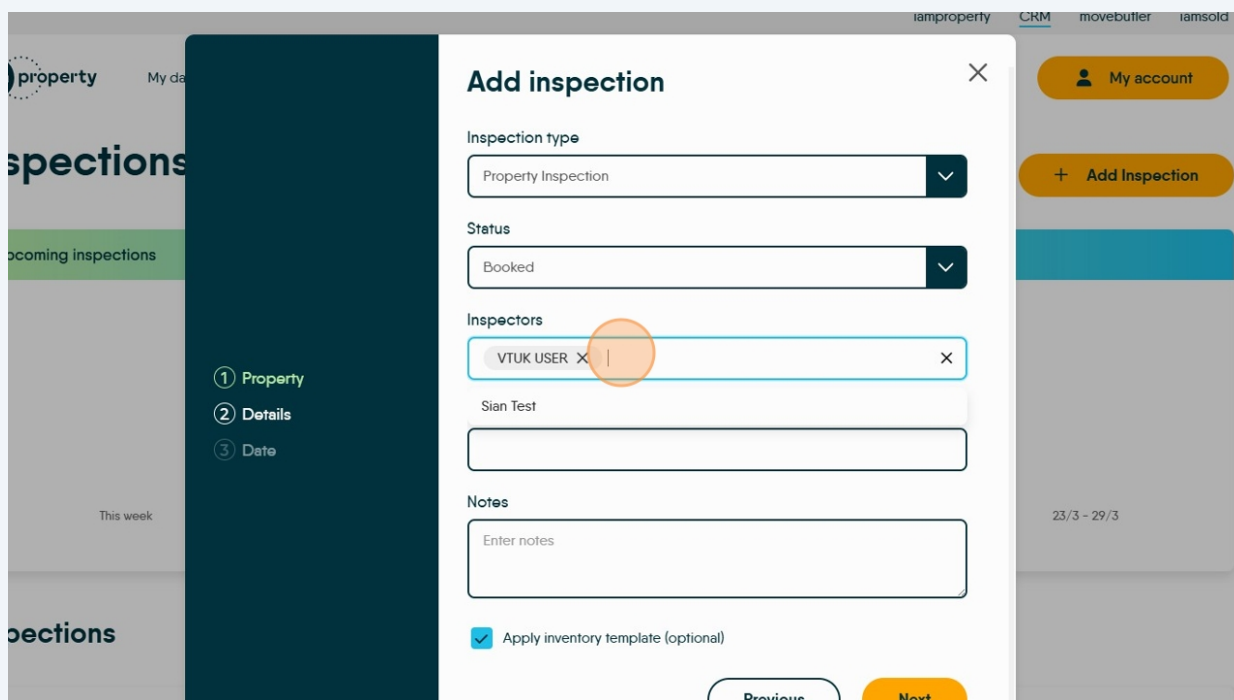
Select the "Status" from the drop down list. This option can be set to automatically show as booked if the property being inspected has a current tenant, via the Inspections configuration.



The screenshot shows the 'Add inspection' form in a web application. The form is titled 'Add inspection' and has a close button (X) in the top right corner. It contains several fields: 'Inspection type' (set to 'Property Inspection'), 'Status' (set to 'Booked'), 'Inspectors' (set to 'VTUK USER'), 'Contractors (Optional)' (empty), and 'Notes' (with a placeholder 'Enter notes'). There is a checkbox for 'Apply inventory template (optional)' which is checked. The background shows a sidebar with navigation links: 'property', 'My dashboard', 'Inspections', 'Upcoming inspections', 'This week', and 'Inspections'. The top navigation bar includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The right sidebar has a 'My account' button and an 'Add Inspection' button.

5

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



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6

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

The screenshot shows a mobile application interface for adding an inspection. On the left, a dark sidebar contains a list of steps: 1 Property, 2 Details, and 3 Date. The main content area is a form titled 'Add Inspection'. It includes several dropdown menus: 'Inspection type' (set to 'Property Inspection'), 'Status' (set to 'Booked'), and 'Inspectors' (set to 'VTUK USER'). Below these is a section labeled 'Contractors (Optional)' with a text input field. An orange circle highlights this input field. Below the input field is a list of contractor names: 'Affordable & Stylish - Appliances and Removal', 'Albion Roofing - Roofer', 'AM-PM Security', 'AquaSpeed Drain Services', 'AS Electronics - Electrician', and 'Atlas Maintenance Limited'. At the bottom of the form are 'Previous' and 'Next' buttons. On the right side of the screen, there is a '+ Add Inspection' button and a progress indicator showing '23/3 - 29/3'.

7

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

This screenshot shows the same 'Add Inspection' form as the previous one, but with the 'Notes' field highlighted by an orange circle. The 'Notes' field is a text input area with the placeholder text 'Enter notes'. Below the 'Notes' field is a checkbox labeled 'Apply inventory template (optional)' which is checked. At the bottom of the form are 'Previous' and 'Next' buttons. The sidebar and other form elements remain the same as in the previous screenshot.

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.

The screenshot shows the 'Inspections' form with a sidebar on the left containing a progress indicator with three steps: 1 Property, 2 Details, and 3 Date. The main form area includes the following fields:

- Inspection type:** A dropdown menu with 'Property Inspection' selected.
- Status:** A dropdown menu with 'Booked' selected.
- Inspectors:** A field with 'VTUK USER' and a close button (X).
- Contractors (Optional):** An empty text input field.
- Notes:** A text area containing 'DEMO INSPECTION'.
- Footer:** A checkbox labeled 'Apply inventory template (optional)' which is checked and highlighted with an orange circle. Below it are 'Previous' and 'Next' buttons.

This screenshot shows the same 'Inspections' form, but with the 'Apply inventory template (optional)' section expanded. The checkbox is checked. Below the checkbox, the text 'Apply inventory template' is followed by the instruction 'Select which template you'd like to apply:'. A search bar is visible at the bottom of this section. The orange circle from the previous screenshot is now positioned over the right side of the 'Notes' text area.

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This week

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① Property

② Details

③ Date

Contractors (Optional)

Notes

DEMO INSPECTION

☒ Apply inventory template (optional)

Apply inventory template

Select which template you'd like to apply:

Select which template you'd like to apply:

Search templates (Optional)

Search templates

No templates found

Please try changing your search.

Previous

Next

+ Add Inspection

23/3 - 29/3

complete

## 9 Click "Next"

s

① Property

② Details

③ Date

Status

Booked

Inspectors

VTUK USER X

Contractors (Optional)

Notes

DEMO INSPECTION

☐ Apply inventory template (optional)

Previous

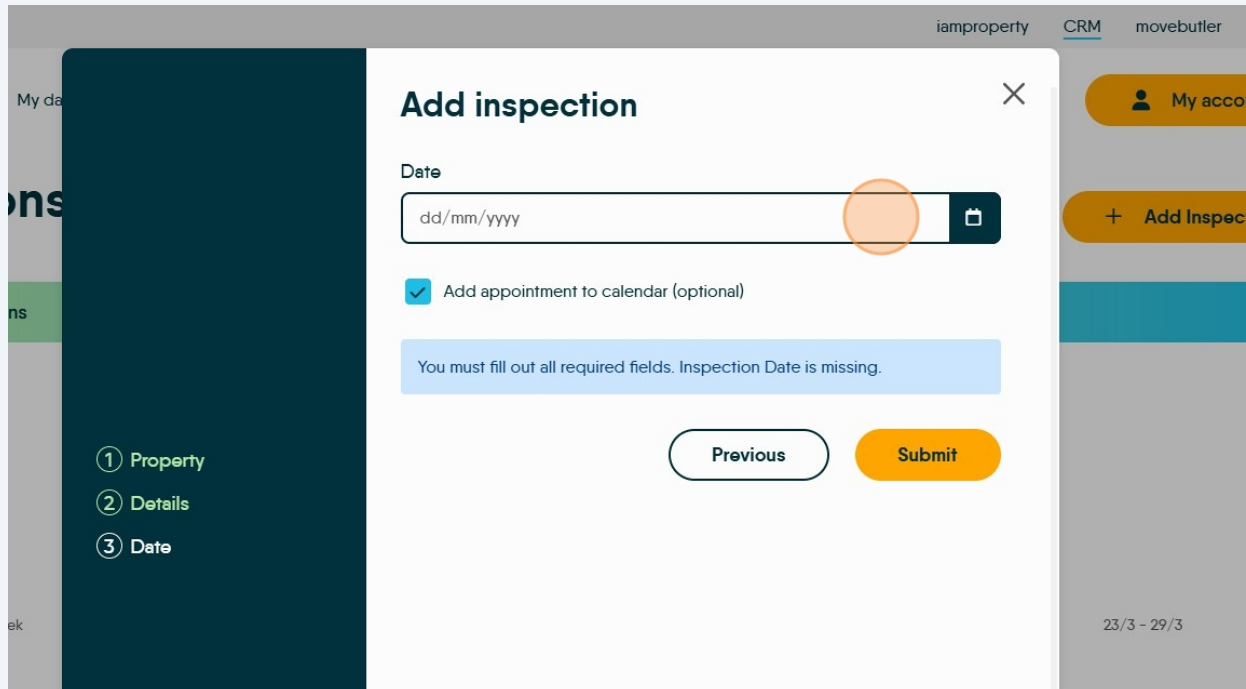
Next

23/3 - 29/3

complete

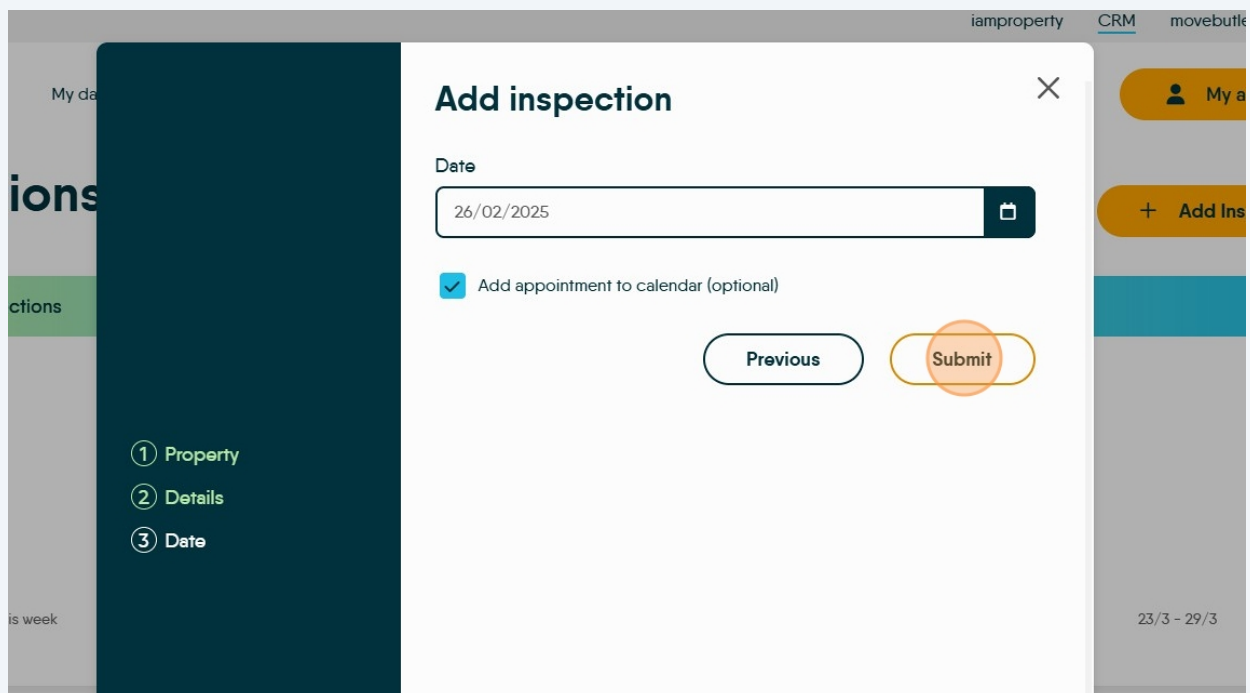
- 10 Click the "Date" field to add the date of the visit to the planned inspection.

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.



The screenshot shows the 'Add inspection' form in a web application. The form has a dark blue sidebar on the left with a list of steps: 1 Property, 2 Details, and 3 Date. The main form area is white and contains a 'Date' field with a placeholder 'dd/mm/yyyy'. An orange circle highlights the date field. Below the date field is a checkbox labeled 'Add appointment to calendar (optional)' which is checked. A light blue error message box states 'You must fill out all required fields. Inspection Date is missing.' At the bottom of the form are two buttons: 'Previous' and 'Submit'.

- 11 Click "Submit" if not adding to the calendar



The screenshot shows the 'Add inspection' form with the date field now populated with '26/02/2025'. The 'Add appointment to calendar (optional)' checkbox remains checked. The 'Submit' button is now highlighted with an orange circle, indicating it should be clicked. The 'Previous' button is also visible. The sidebar and error message are still present.

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"

The screenshot shows the 'Add inspection' form. On the left is a dark sidebar with a menu containing '1 Property', '2 Details', and '3 Date'. The 'Date' option is selected. The main form area has a title 'Add inspection' and a close button. It includes a 'Date' field with the value '26/02/2025' and a calendar icon. Below this is a checkbox 'Add appointment to calendar (optional)' which is checked. The 'Appointment' section has an 'All day' checkbox which is unchecked. There are two rows of time selection: 'Start time (Optional)' and 'End time'. The 'Start time' field is highlighted with an orange circle and contains a clock icon. The 'Duration' field is a dropdown menu. At the bottom are 'Previous' and 'Submit' buttons.

This screenshot shows the same 'Add inspection' form, but the 'Duration' dropdown menu is now open, showing '45 Mins' as the selected option. The 'Start time' field now contains the value '16:00' and the 'End time' field contains '16:45'. The 'Previous' and 'Submit' buttons remain at the bottom.

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This week

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1 Property

2 Details

3 Date

Date

26/02/2025

+

Add Inspection

☒ Add appointment to calendar (optional)

Appointment

☐ All day

Start time (Optional)

16:00

Duration

45 Mins

End time

16:45

Previous

Submit

23/3 - 29/3

complete