

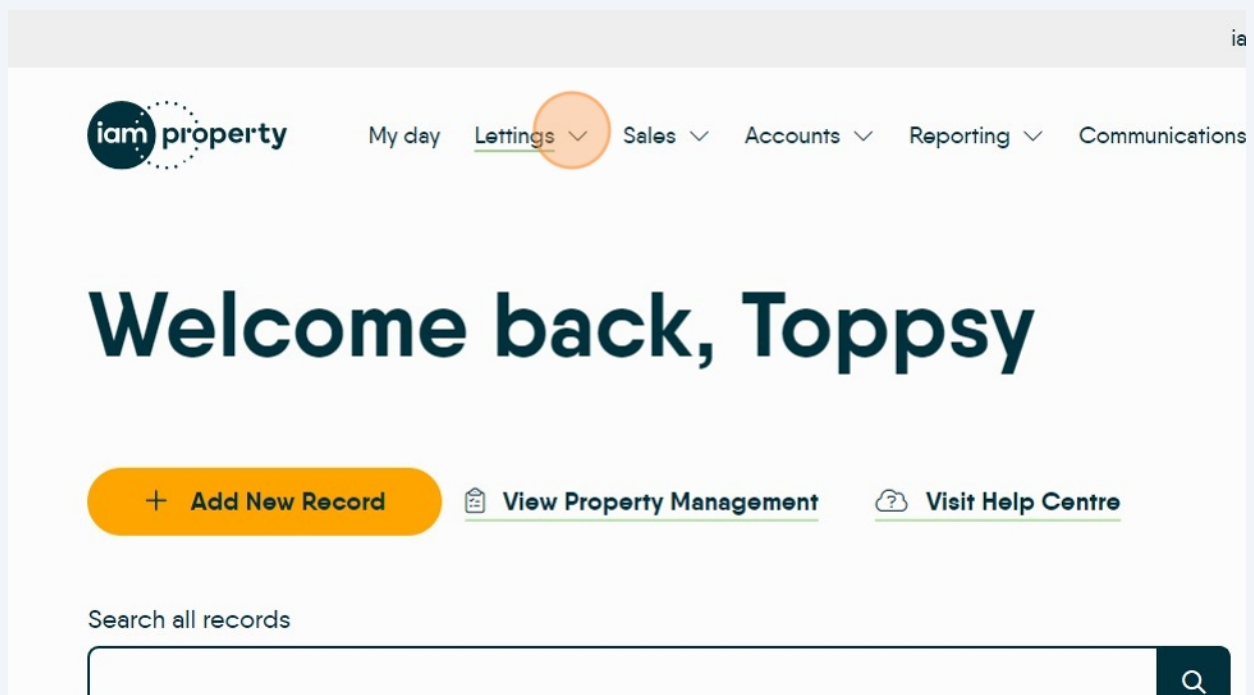
Creating the (final) Inspection Report in iamproperty CRM



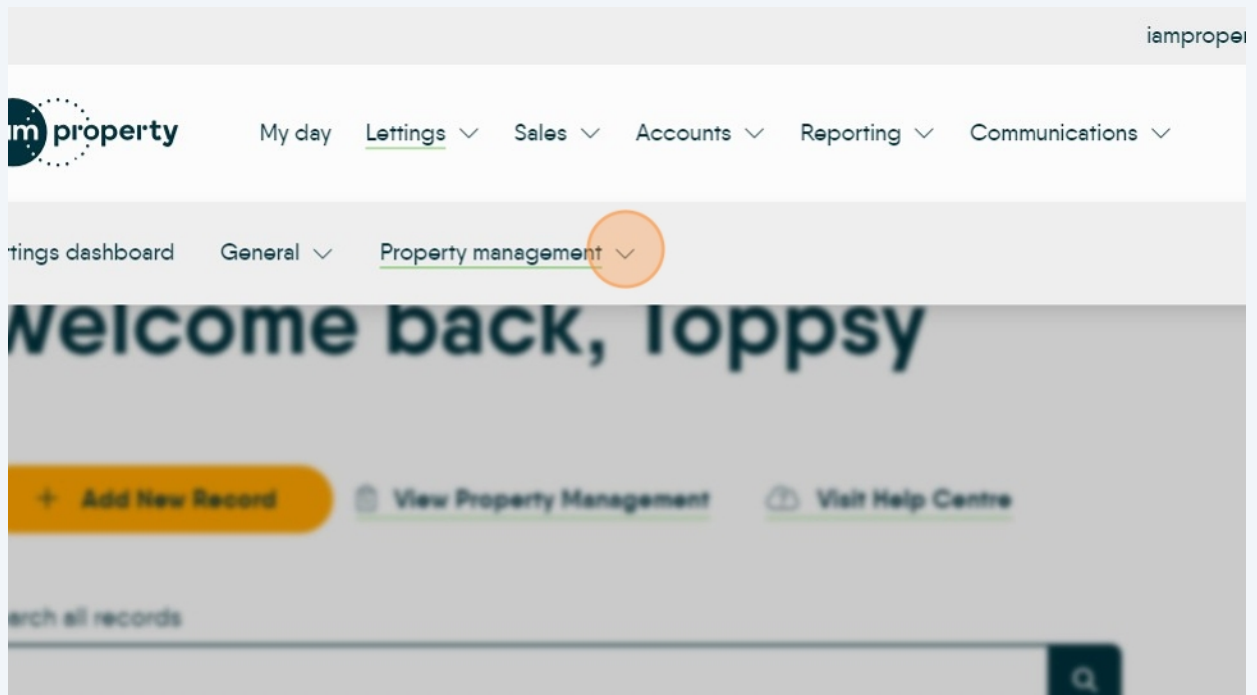
This guide provides a step-by-step approach to creating a final inspection report in the Inspections module, ensuring users can navigate the system efficiently. It simplifies the process, helping property managers save time and reduce errors while managing inspections.

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

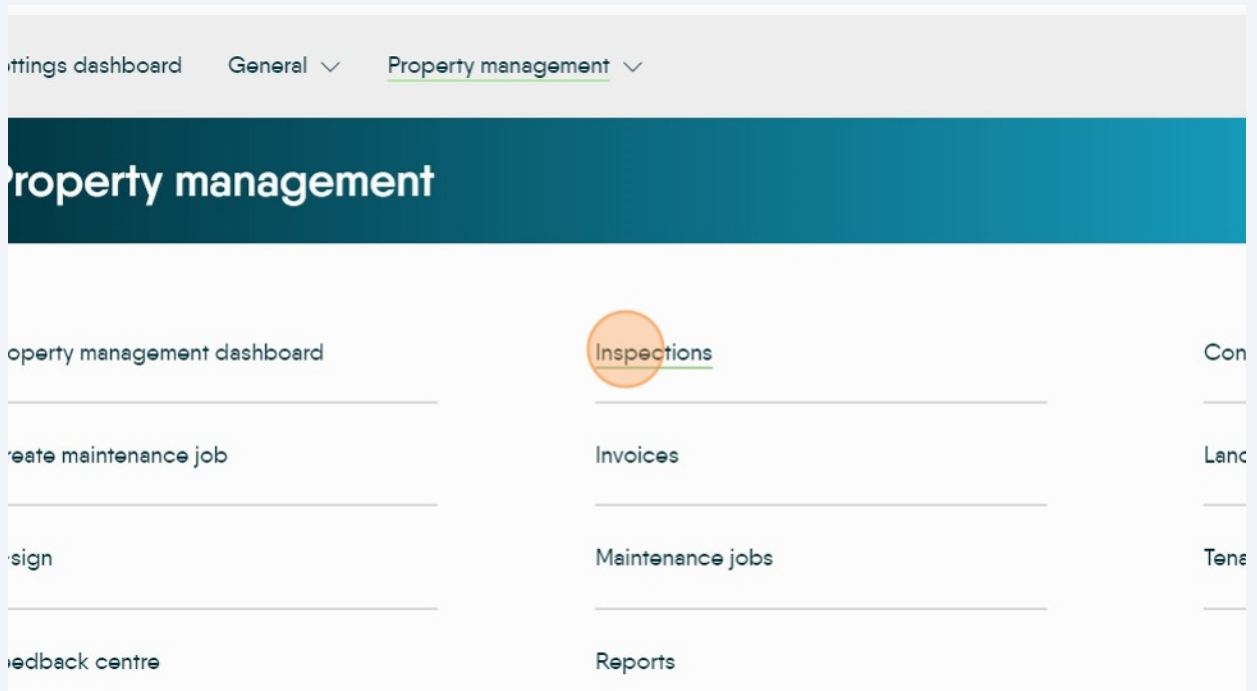
- 2 Firstly Click on "Lettings"



3 Then Click "Property management"



4 Then Click on "Inspections"



5

If you are creating the Report for an already completed inspection follow this process, otherwise jump this slide.

Scroll down the page to find the inspection you want to create the report for and Click "View" on the right hand side

iamproperty CRM movebutler iamsold				
Sales Accounts Reporting Communications				
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View

View

View

Win £200!

Win £200!

6

To create the report the inspection must be 100% completed. Click "Generate Report"

Cleveland Court, Grosvenor

eter

Date of inspection:

18/Jul/2024

Tenancy:

No name found

100%

Generate Report

View Report

Appointment

Win £200!

7 Select your report options

The screenshot shows a web application interface for generating a report. On the left is a dark sidebar with three menu items: '1 Report Options' (highlighted), '2 Follow Up', and '3 Summary'. The main content area is titled 'Generate Report'. It contains two questions, each with 'Yes' and 'No' radio button options. The first question is 'Would you like to send the report to the landlord(s)?' with 'No' selected. The second question is 'Would you like to send the report to the tenant(s)?' with 'No' selected. An orange 'Next' button is on the right. At the bottom, there are tabs for 'Inventory' and 'Media'.

Generate Report

Would you like to send the report to the landlord(s)?

☐ Yes ☒ No

Would you like to send the report to the tenant(s)?

☐ Yes ☒ No

Next

Inventory Media

8 If you want to create a follow up inspection. Click "Yes" otherwise "No"

The screenshot shows the same web application interface, but now the '2 Follow Up' menu item is highlighted in the sidebar. The 'Generate Report' form has a close button (X) in the top right. The question is 'Would you like to arrange a follow up inspection?' with 'Yes' selected. There are 'Previous' and 'Next' buttons at the bottom right. The background shows a blurred view of the application's main content area with a breadcrumb trail 'DASHBOARD / Inspection - Flat 27 Cleveland Court, Grosvenor Place, Exeter' and a sidebar with a home icon and a list of items including 'Date of inspection', '1/20', 'ounc', 'apo', 'ew', 'Inventory', 'Media', 'Section Details', and 'Appointment'.

Generate Report

Would you like to arrange a follow up inspection?

☒ Yes ☐ No

Previous **Next**

DASHBOARD / Inspection - Flat 27 Cleveland Court, Grosvenor Place, Exeter

Home icon

1 Report Options

2 Follow Up

3 Summary

Date of inspection

1/20

ounc

apo

ew

Inventory

Media

Section Details

Appointment

9 Complete the on screen options and click "Next"

iam proper

HOME / DASHBOARD

1 Report Options

2 Follow Up

3 Summary

Overview

Inspection

Generate Report

Would you like to arrange a follow up inspection?

☒ Yes ☐ No

Date

dd/mm/yyyy

☐ Add appointment to calendar (Optional)

Inspection type

Status

Inspectors

Previous Next

10 Click "Add appointment to calendar (Optional)" if you want this appointment to show in the Calendar, if this is not selected the appointment will only show in the Inspections module.

HOME / DASHBOARD

1 Report Options

2 Follow Up

3 Summary

Overview

Inspection

Generate Report

Would you like to arrange a follow up inspection?

☒ Yes ☐ No

Date

20/11/2024

☒ Add appointment to calendar (Optional)

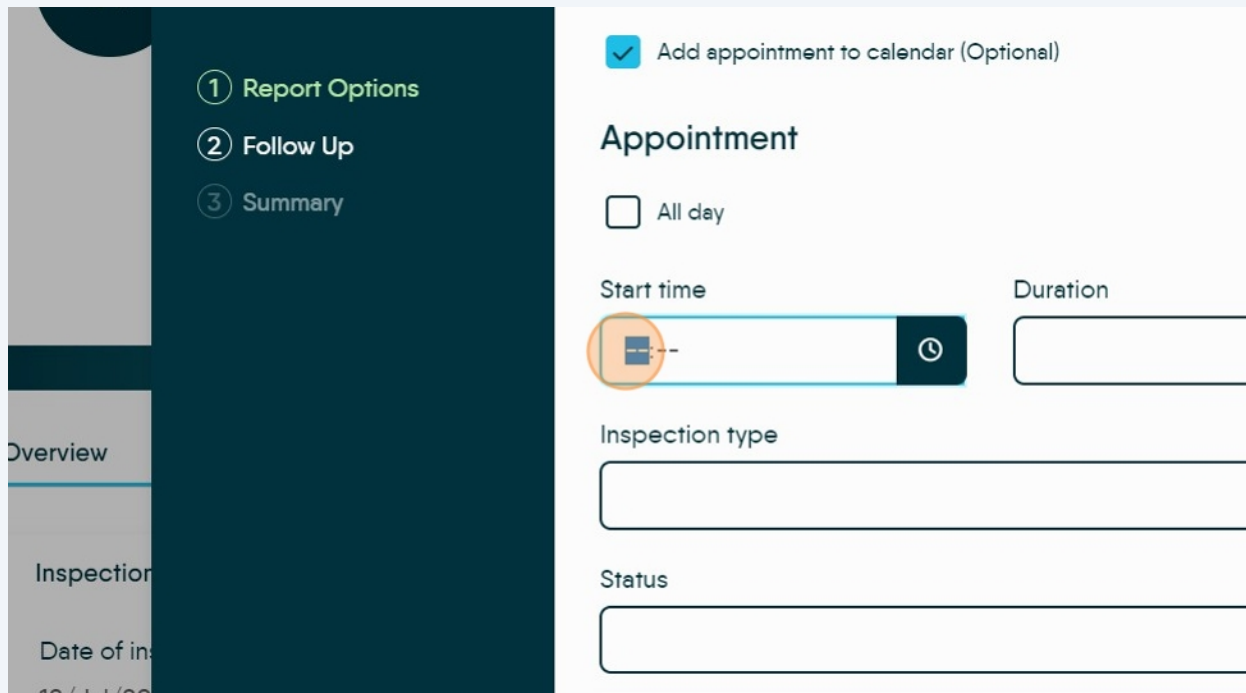
Inspection type

Status

Inspectors

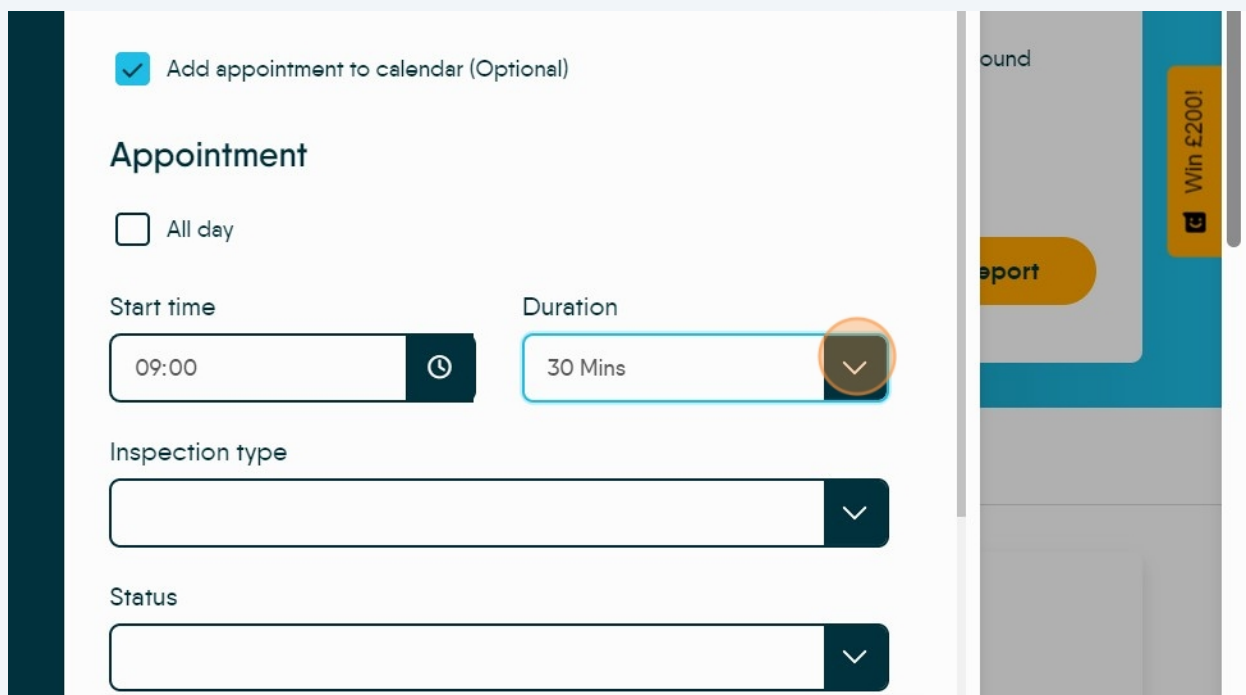
Previous Next

11 Click the "Start time" field.



The screenshot shows a sidebar on the left with three menu items: '1 Report Options' (highlighted in green), '2 Follow Up', and '3 Summary'. The main content area is titled 'Appointment' and includes a checked checkbox for 'Add appointment to calendar (Optional)'. Below this is an 'All day' checkbox. The 'Start time' field is highlighted with an orange circle and contains a clock icon. The 'Duration' field is empty. Below these are 'Inspection type' and 'Status' dropdown menus, both currently empty.

12 Select the time scale you wish to use.



The screenshot shows the 'Appointment' form with the 'Start time' field set to '09:00'. The 'Duration' field is highlighted with an orange circle and shows a dropdown menu with '30 Mins' selected. The 'Inspection type' and 'Status' dropdown menus are also visible, both with downward arrows indicating they can be expanded. On the right side of the screen, there is a vertical banner with a 'Win £200!' message and a 'Report' button.

13 Select the option in inspection type

☐ All day

Start time: 09:00

Duration: 30 Mins

Inspection type: Check In

Status:

Inspectors:

14 Select the option, for status

☐ All day

Start time: 09:00

Duration: 30 Mins

Inspection type: Check In

Status: Booked

Inspectors:

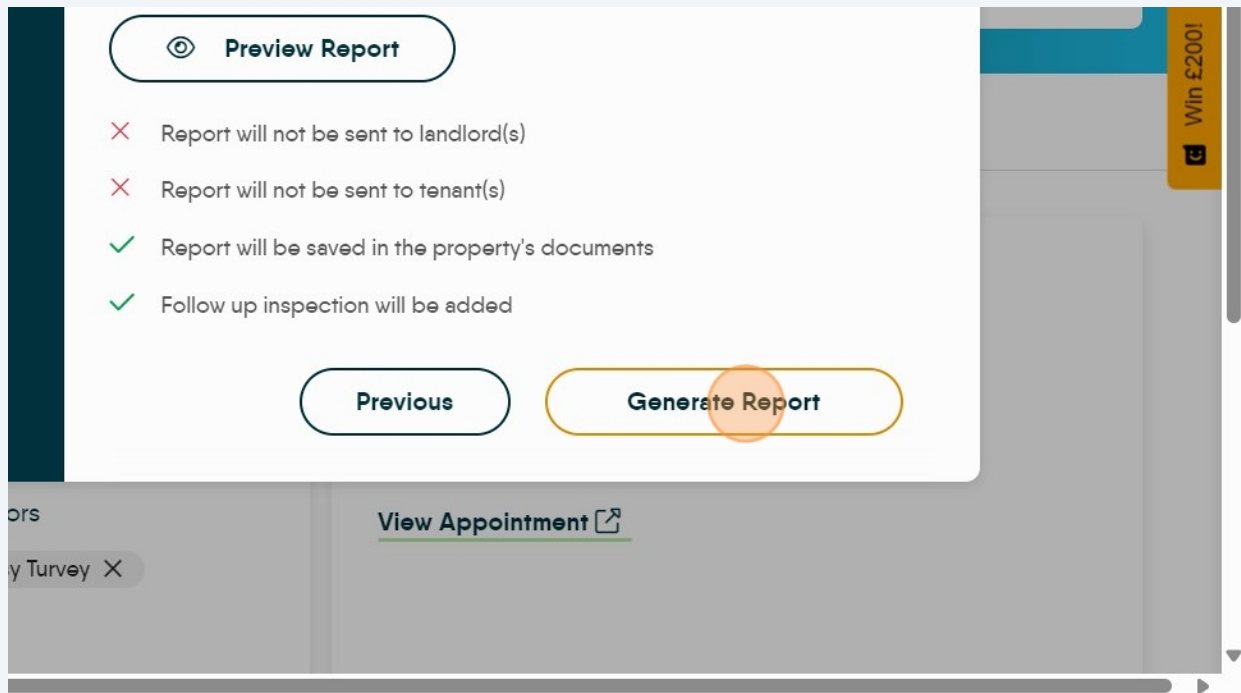
15 Click the inspector that you require

The screenshot shows a booking interface. On the left is a dark sidebar with three items: '1 Report Options' (highlighted in green), '2 Follow Up', and '3 Summary'. The main area contains several form fields: a time slot '09:00' with a clock icon, a duration '30 Mins' with a dropdown arrow, 'Inspection type' set to 'Check In', and 'Status' set to 'Booked'. The 'Inspectors' field is highlighted with a light blue border and contains a vertical line. Below it, a list of inspectors is visible, with 'Topsy Turvey' and 'Dan Carter' shown. At the bottom, a grey bar contains the text 'Check in' and '45m duration. Ends at 10:45:00'.

16 Click "Next"

This screenshot shows the same booking form as in step 15, but with the 'Inspectors' field populated with 'Topsy Turvey' and a close 'X' button. At the bottom of the form, there are two buttons: 'Previous' and 'Next'. The 'Next' button is highlighted with an orange circle. To the right of the form, a vertical sidebar contains a yellow banner that says 'Win £200!' with a camera icon.

17 Click "Generate Report"



18 The report will generate and will be available in the Documents folder of the property record.