

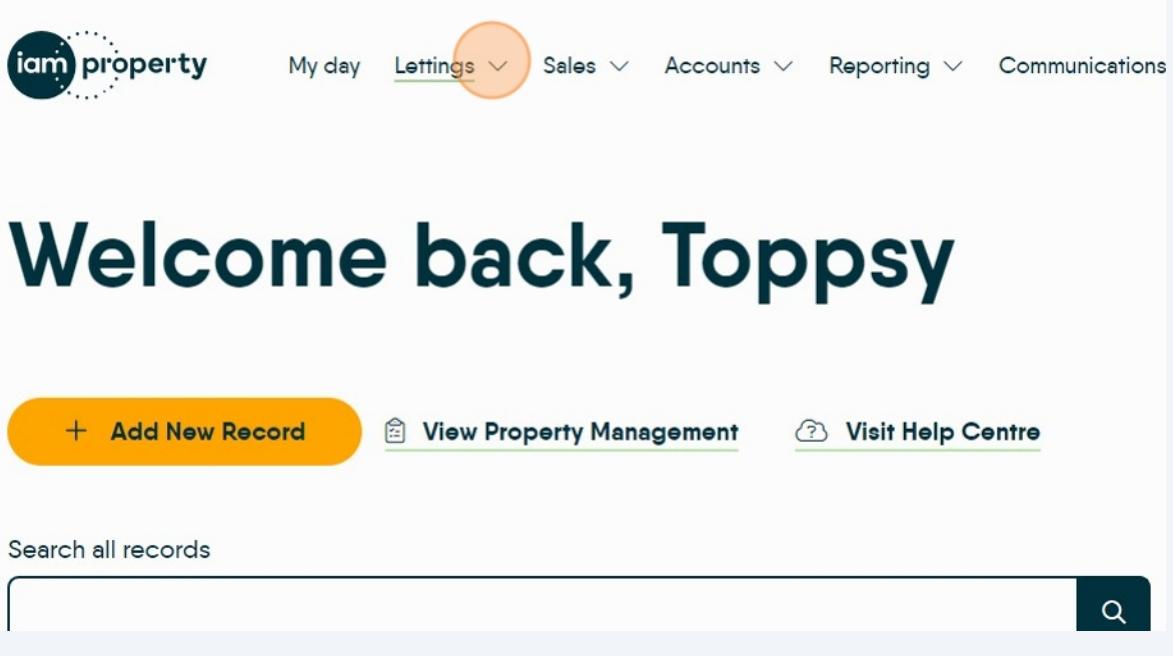
# Creating the (final) Inspection Report in iamproperty CRM



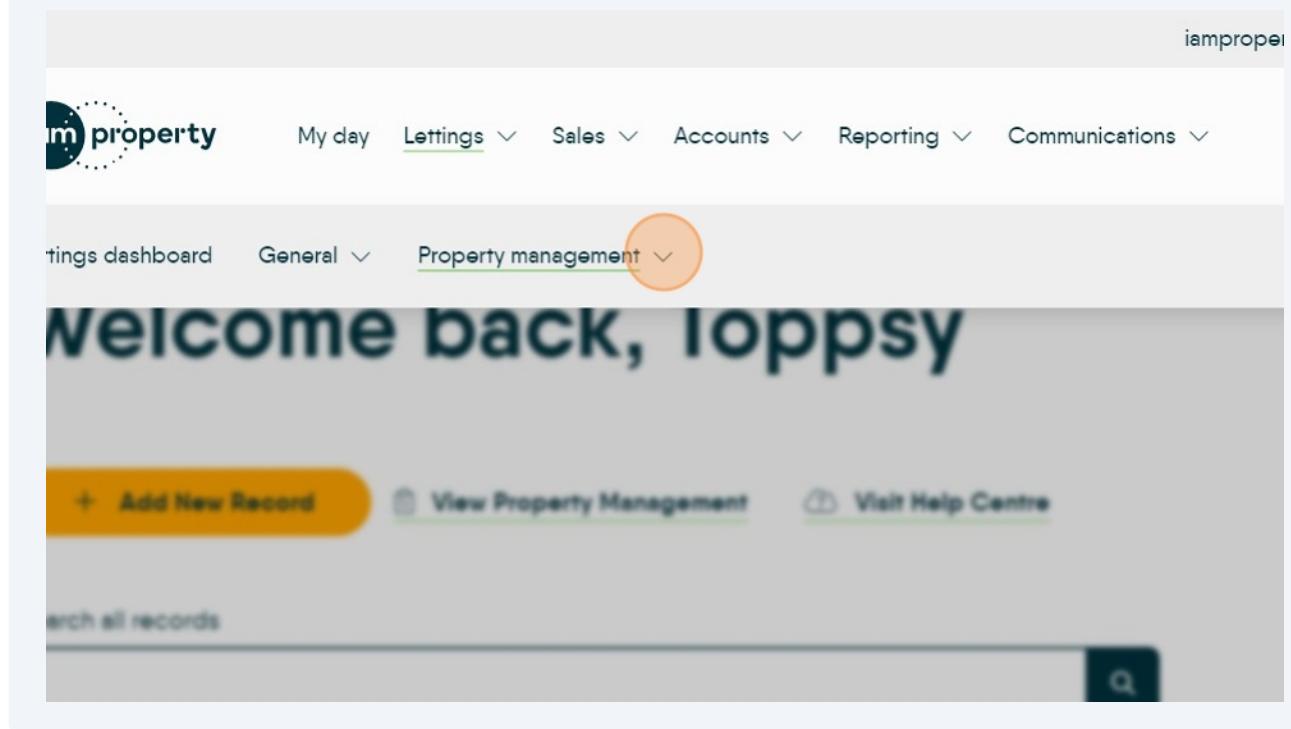
This guide provides a step-by-step approach to creating a final inspection report in the Inspections module, ensuring users can navigate the system efficiently. It simplifies the process, helping property managers save time and reduce errors while managing inspections.

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

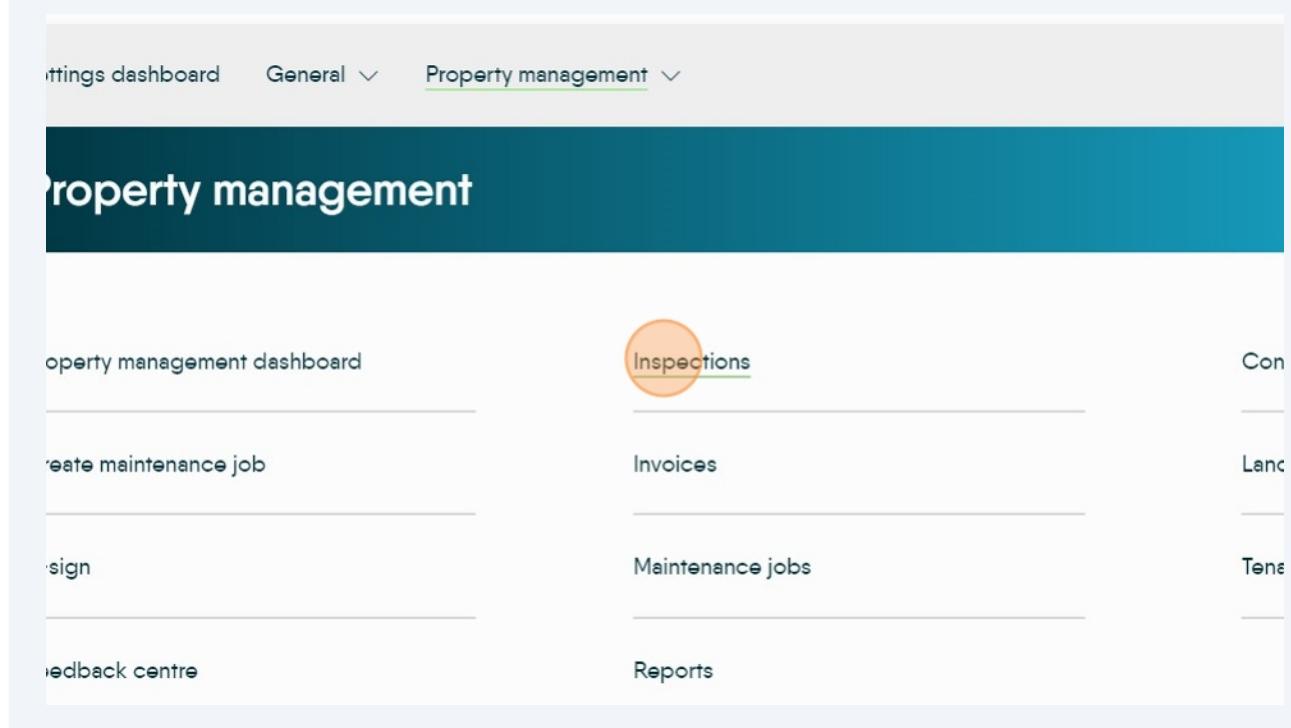
- 2 Firstly Click on "Lettings"



3 Then Click "Property management"

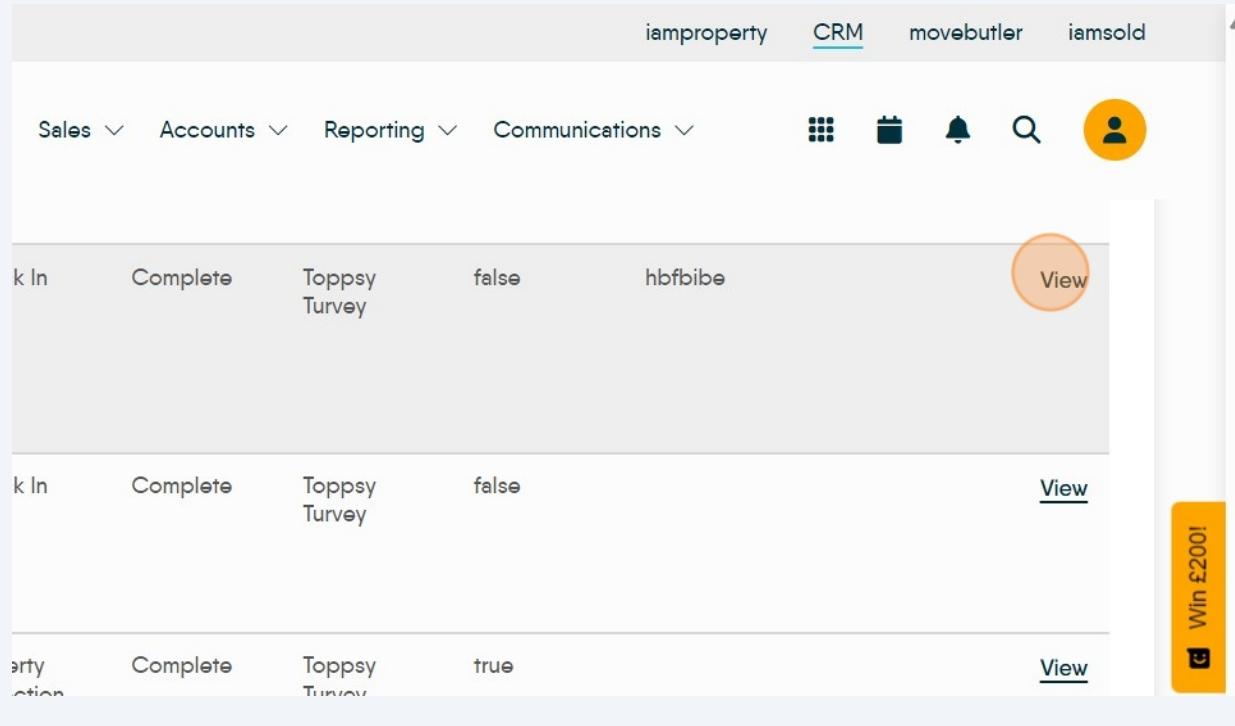


4 Then Click on "Inspections"



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

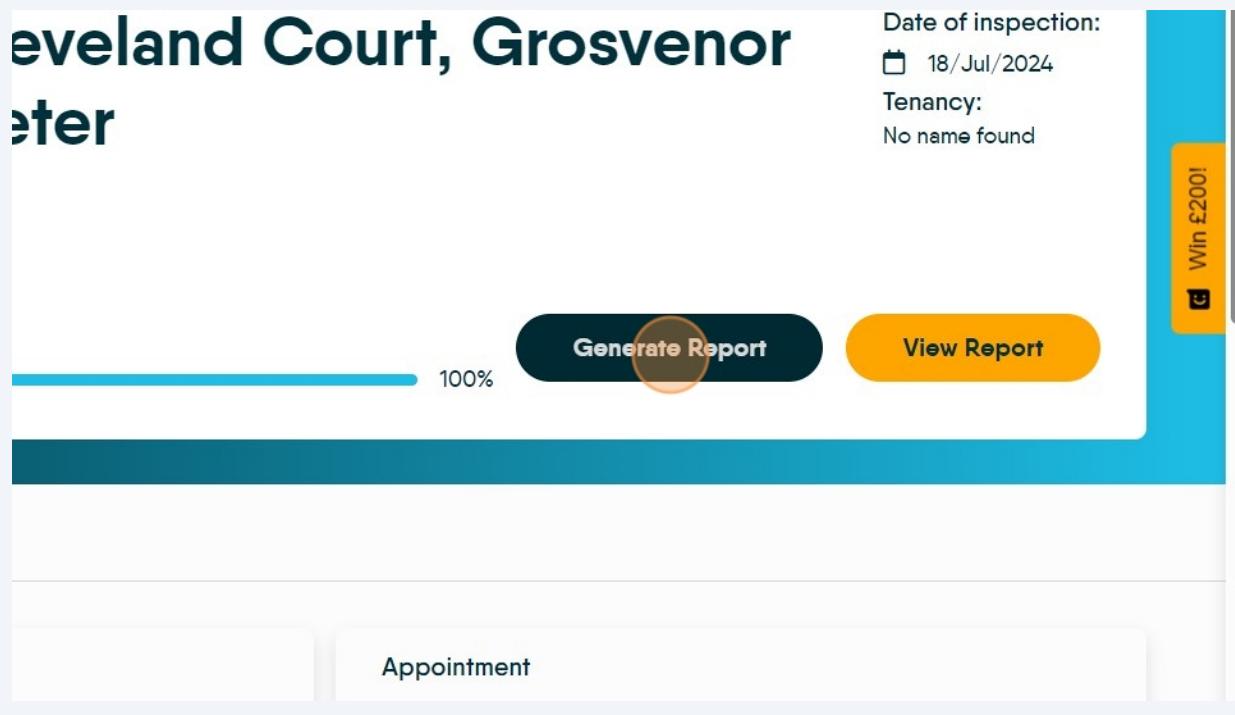
Scroll down the page to find the inspection you want to create the report for and Click "View" on the right hand side



The screenshot shows a list of inspections in the CRM. Each inspection row includes columns for 'k In', 'Complete', 'Tenancy', 'false', and 'hbfbibe'. To the right of each row is a 'View' button, with the first one highlighted with a yellow circle. A vertical sidebar on the right features a 'Win £200!' button.

k In	Complete	Tenancy	false	hbfbibe	
1	Complete	Topsy Turvey	false	hbfbibe	<a href="#">View</a>
2	Complete	Topsy Turvey	false		<a href="#">View</a>
3	Complete	Topsy Turvey	true		<a href="#">View</a>

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



The screenshot shows the inspection detail page for 'eveland Court, Grosvenor'. The inspection is 100% completed. The 'Generate Report' button is highlighted with a yellow circle. A sidebar on the right displays the date of inspection (18/Jul/2024) and tenancy information (No name found). A vertical sidebar on the right features a 'Win £200!' button.

Date of inspection: 18/Jul/2024

Tenancy: No name found

100%

Generate Report

View Report

Appointment

7 Select your report options

## 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"

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

## Flat 27 Cleveland Court, Exeter

Date of inspection: 1/20/2023

### Generate Report

Would you like to arrange a follow up inspection?

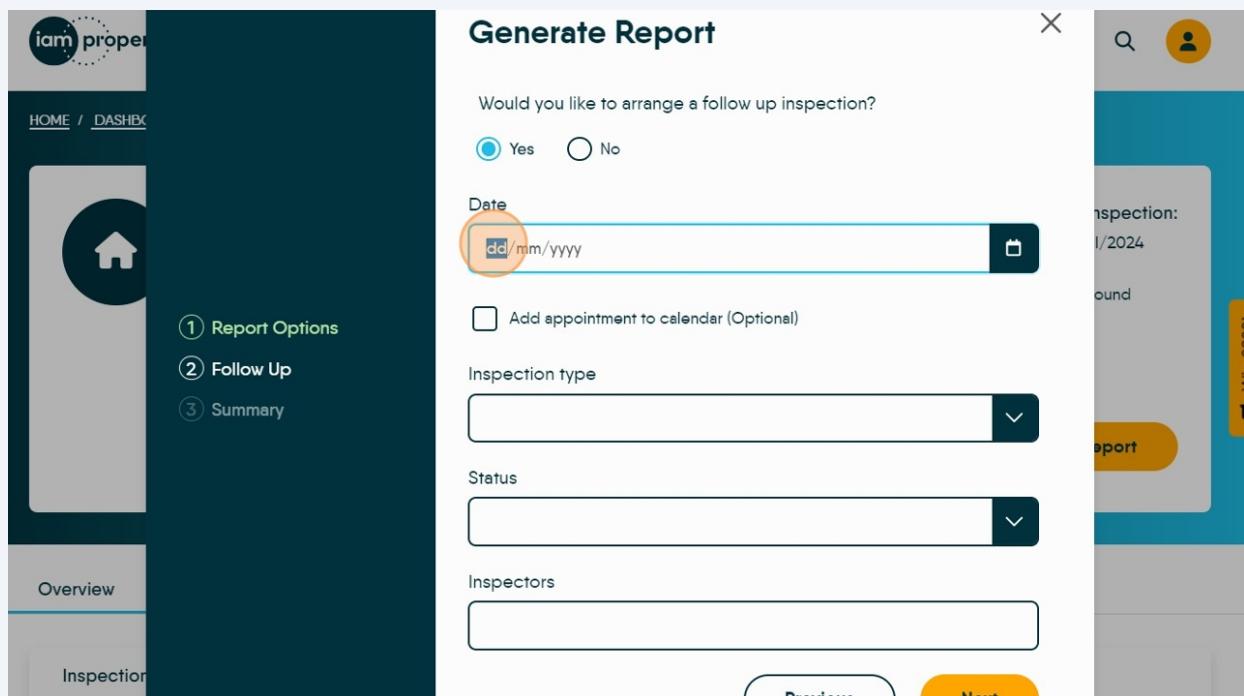
Yes  No

**Previous** **Next**

ew Inventory Media

Section Details Appointment

9 Complete the on screen options and click "Next"



Generate Report

Would you like to arrange a follow up inspection?

Yes  No

Date

dd/mm/yyyy

Add appointment to calendar (Optional)

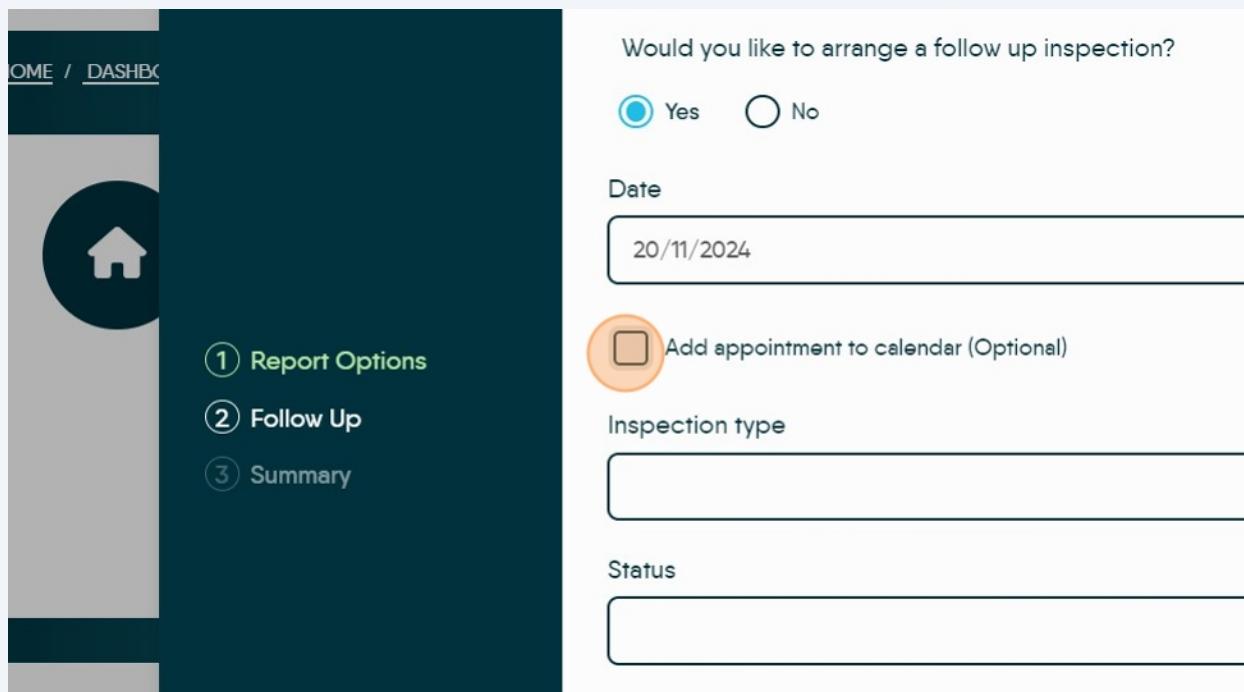
Inspection type

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.



Would you like to arrange a follow up inspection?

Yes  No

Date

20/11/2024

Add appointment to calendar (Optional)

Inspection type

Status

Previous Next

11 Click the "Start time" field.



Report Options

Follow Up

Summary

Add appointment to calendar (Optional)

### Appointment

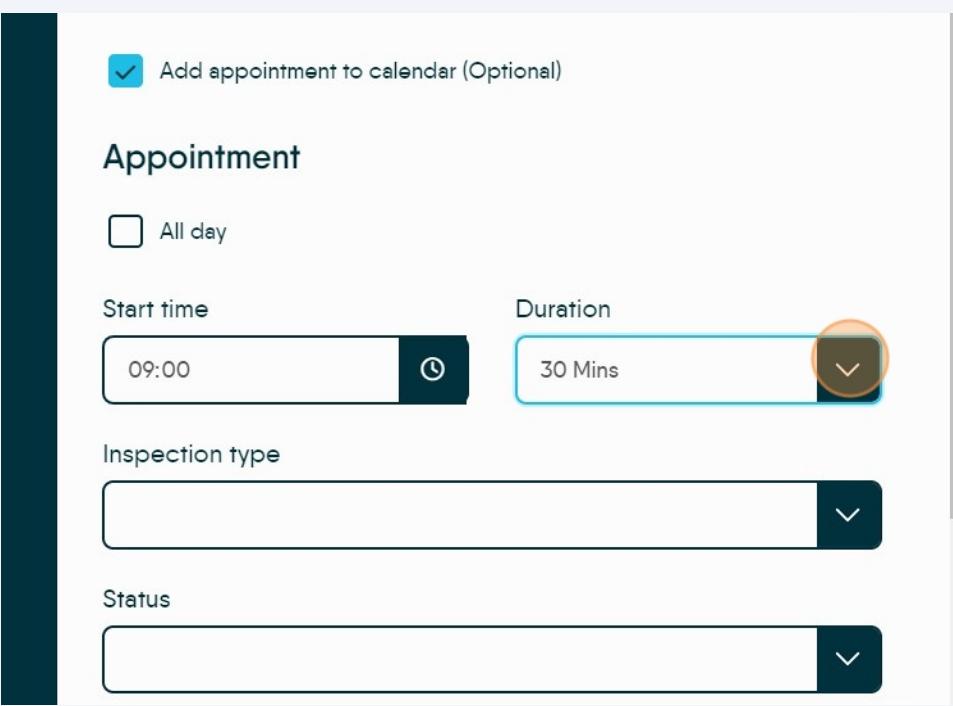
All day

Start time  Duration

Inspection type

Status

12 Select the time scale you wish to use.



Add appointment to calendar (Optional)

### Appointment

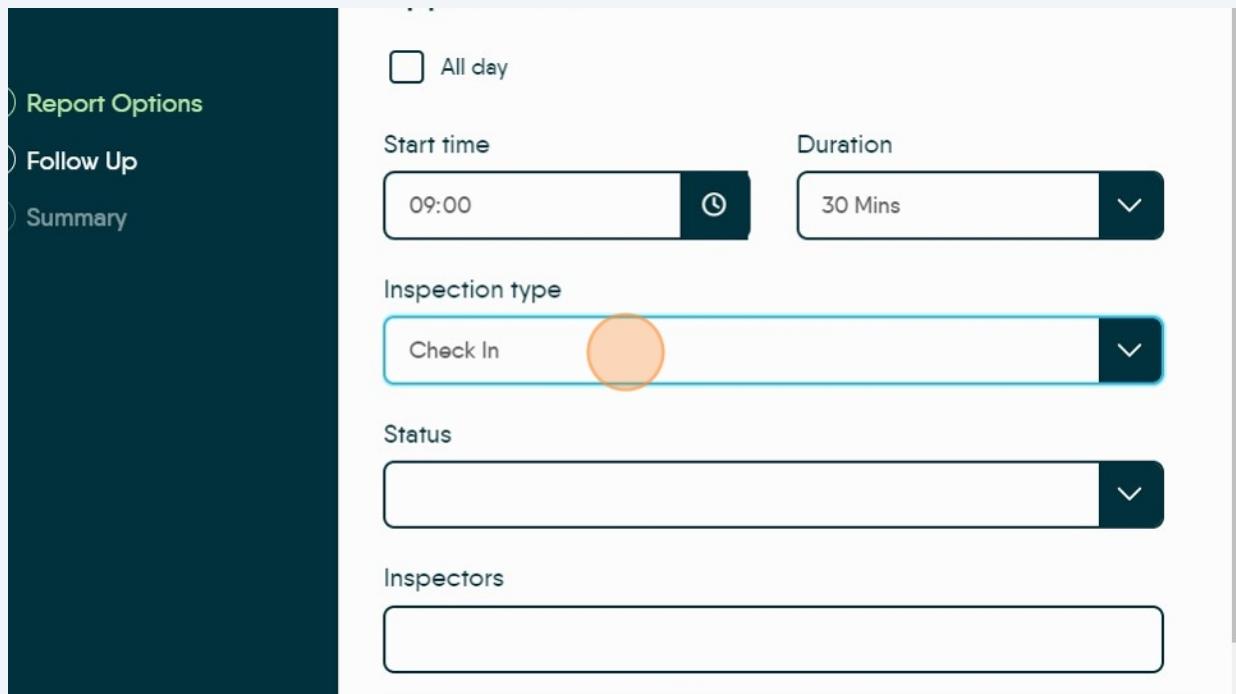
All day

Start time  Duration

Inspection type

Status

13 Select the option in inspection type



Report Options

Follow Up

Summary

All day

Start time: 09:00

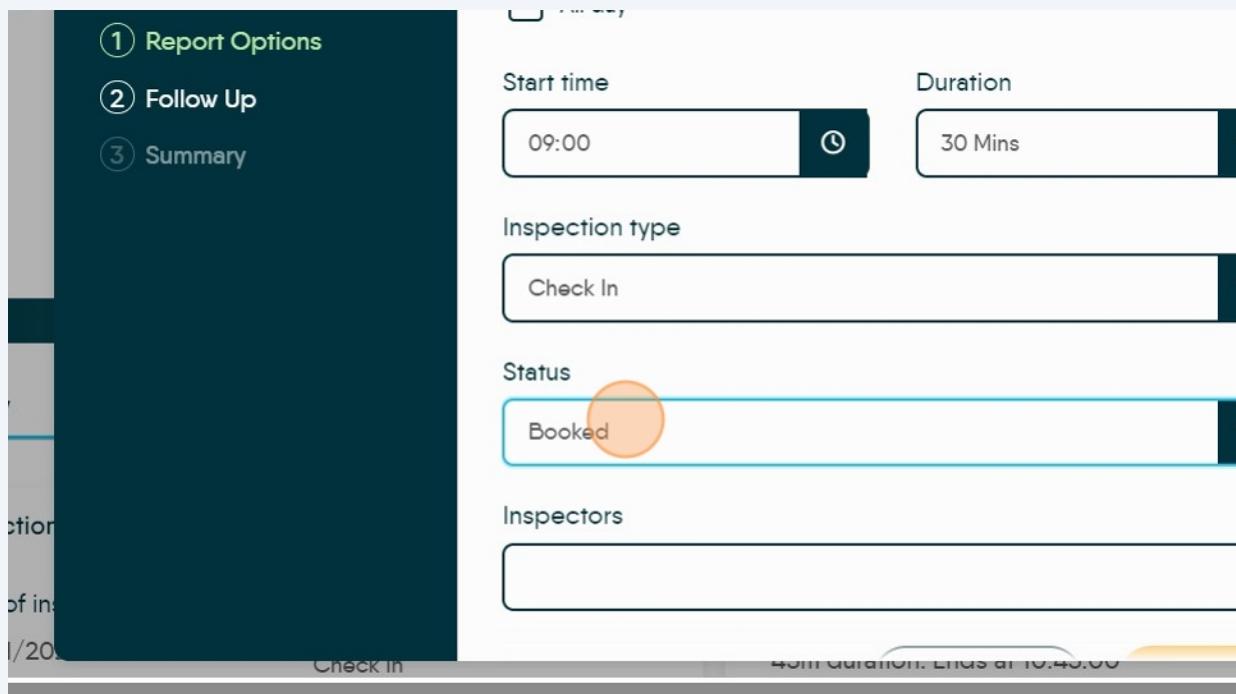
Duration: 30 Mins

Inspection type: Check In

Status

Inspectors

14 Select the option, for status



Report Options

Follow Up

Summary

Start time: 09:00

Duration: 30 Mins

Inspection type: Check In

Status: Booked

Inspectors

Check In

45M Duration. Ends at 10:45:00

15 Click the inspector that you require

Report Options

① Report Options

② Follow Up

③ Summary

09:00

30 Mins

Inspection type

Check In

Status

Booked

Inspectors

Topsy Turvey

Dan Carter

Check In

45m duration. Ends at 10:45:00

The 'Inspectors' section shows a list of names: Topsy Turvey and Dan Carter. The name 'Topsy Turvey' is highlighted with an orange circle, indicating it is selected.

16 Click "Next"

09:00

30 Mins

Inspection type

Check In

Status

Booked

Inspectors

Topsy Turvey X

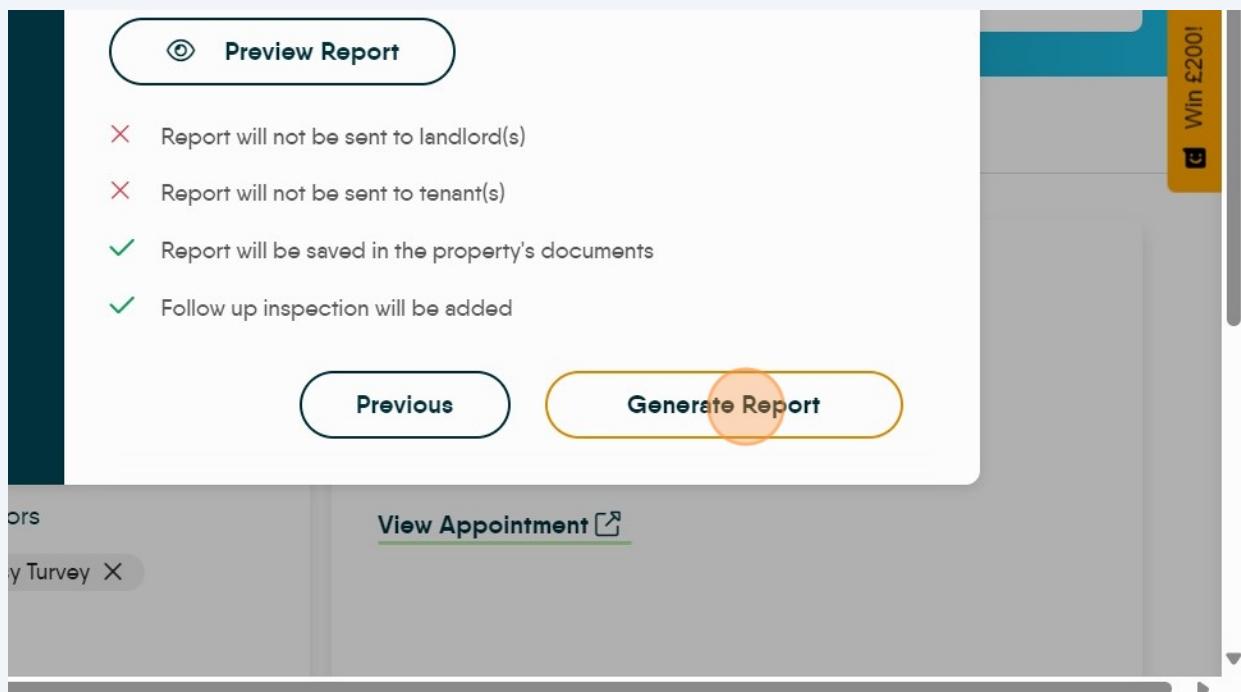
Previous

Next

Win £200!

The 'Inspectors' section shows the name 'Topsy Turvey' with an 'X' to its right, indicating it has been removed. The 'Next' button at the bottom is highlighted with an orange circle.

17 Click "Generate Report"



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