

Scheduling a Property Inspection in CRM



Learn how to efficiently book and organise a property inspection for your lettings portfolio. This guide covers selecting inspectors, setting dates, and saving your appointment details directly into the CRM system.

1

Navigate to <https://crm.iamproperty.com//Lettings/Property/Record/10801503#inspections>

My day

Lettings ▾

Sales ▾

Accounts ▾

Reporting ▾

Communications ▾

4333 Barrett Road, Darlington, DL3 8LA |

4 2 | £ 1500.00 pcm

Available

¹ Lead landlord:
Mr & Mrs Lettings La...

View Landlords

⁰ Lead tenant:

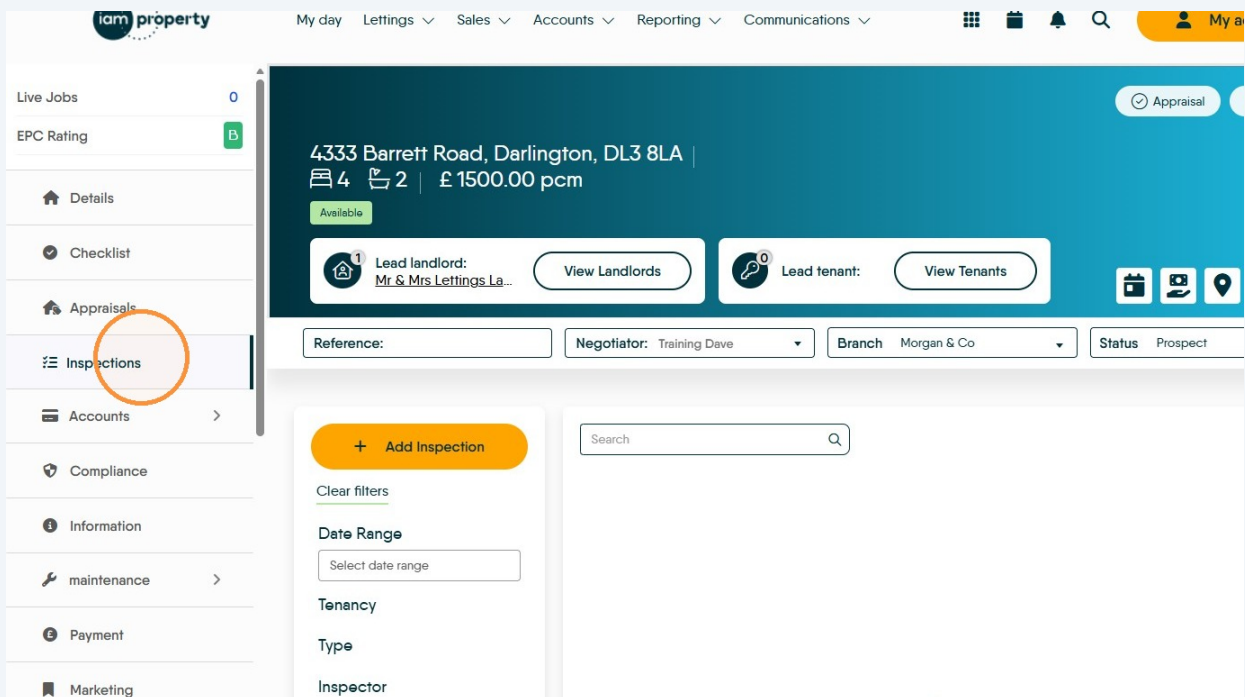
View Tenants

Reference:

Negotiator: Training Dave ▾

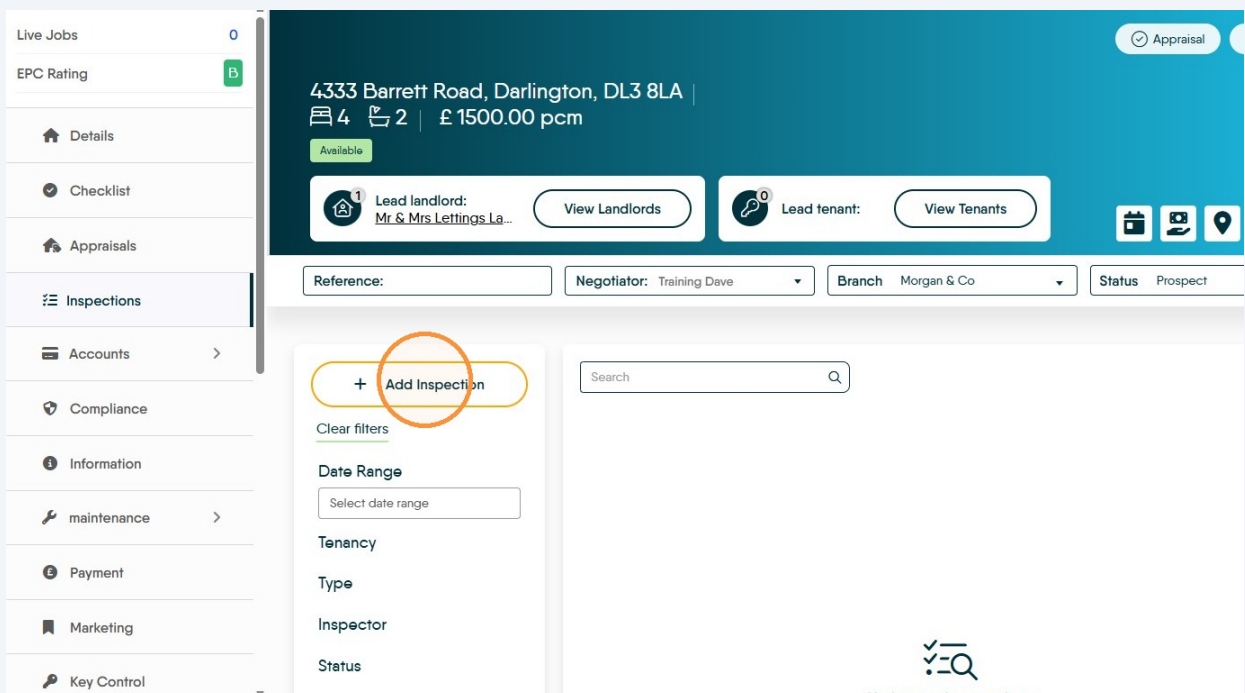
Branch Morgan & Co

2 Click "Inspections"



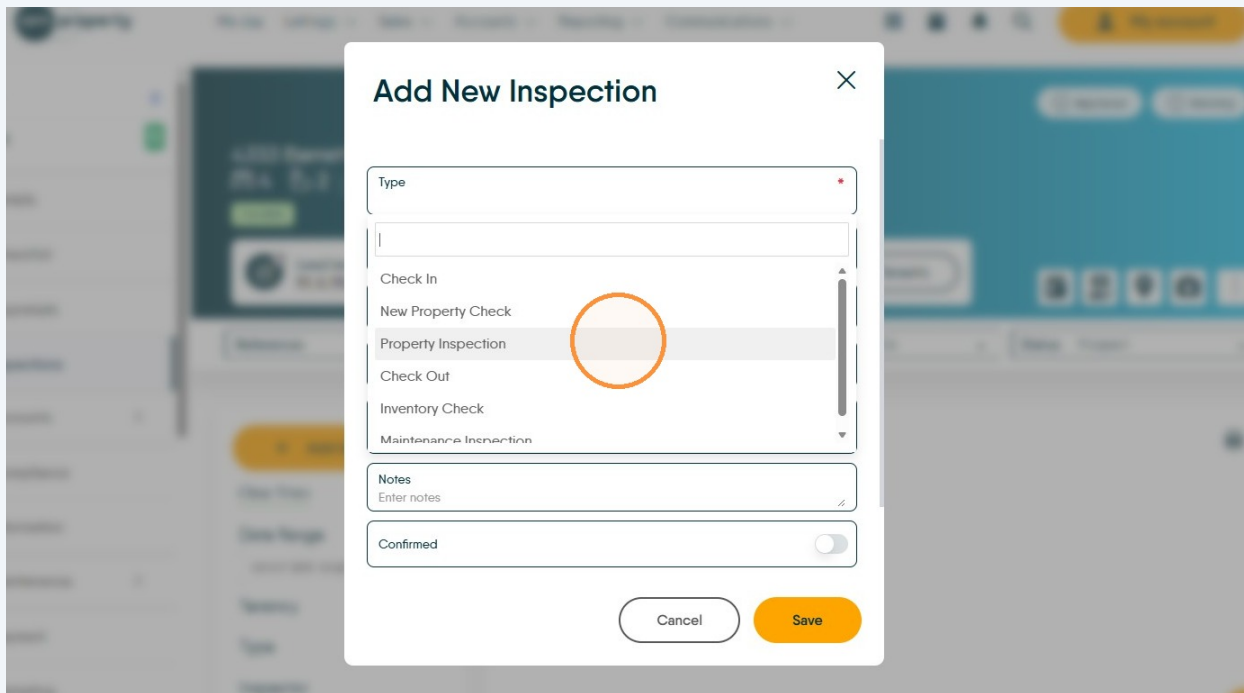
Inspection Setup

3 Click "Add Inspection"



4

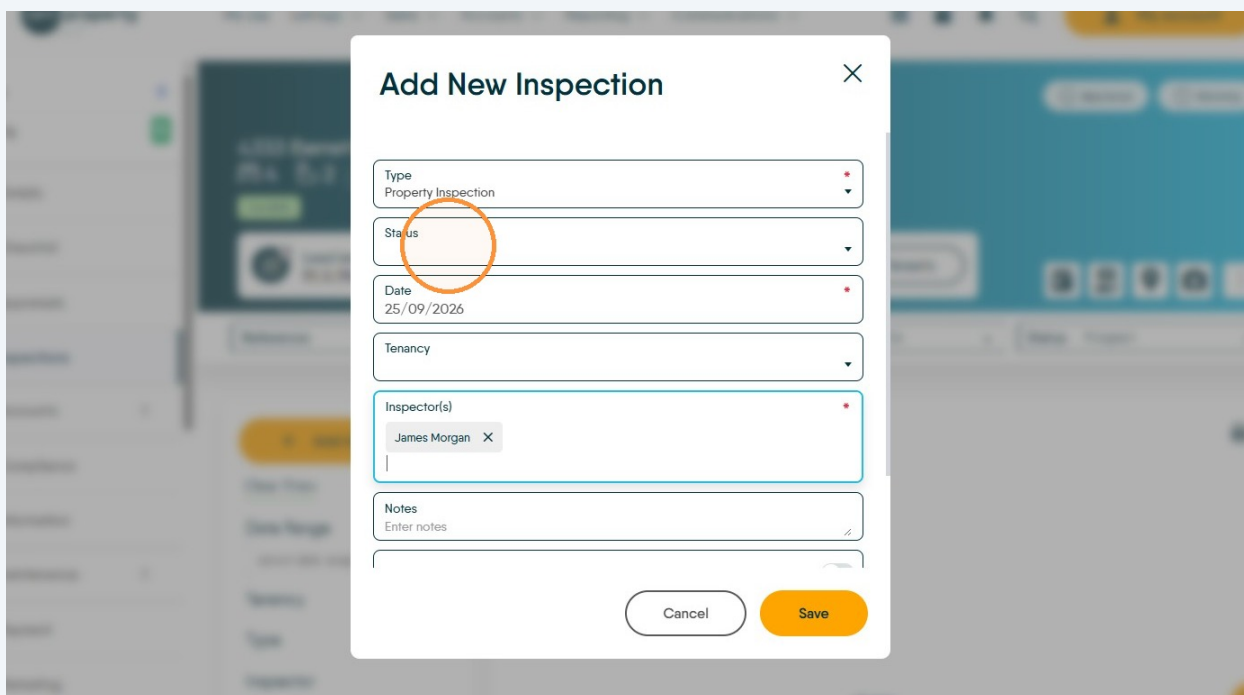
Click "**Type**" and from the drop down menu select the type of Inspection you are planning e.g. "Property Inspection"



The screenshot shows a modal window titled "Add New Inspection" with a close button (X) in the top right corner. The form contains several fields: a "Type" dropdown menu, a "Notes" text area, and a "Confirmed" toggle switch. The "Type" dropdown menu is open, displaying a list of options: "Check In", "New Property Check", "Property Inspection", "Check Out", "Inventory Check", and "Maintenance Inspection". The "Property Inspection" option is highlighted with an orange circle. At the bottom of the form, there are "Cancel" and "Save" buttons.

5

Click "**Status**" and set the status of the visit from the drop down menu, e.g. select "**Pending**"



The screenshot shows the same "Add New Inspection" modal window. In this step, the "Status" dropdown menu is open, and the "Pending" option is selected, indicated by an orange circle. The "Type" dropdown menu is now closed and shows "Property Inspection". The "Date" field is populated with "25/09/2026". The "Inspector(s)" field shows "James Morgan" with a close button (X). The "Notes" text area is empty. The "Cancel" and "Save" buttons are at the bottom.

The screenshot shows a modal window titled "Add New Inspection" with a close button (X) in the top right corner. The form contains the following fields:

- Type:** A dropdown menu with "Property Inspection" selected.
- Status:** A dropdown menu that is open, showing a list of options: "Pending" (highlighted with an orange circle), "Assigned", "Confirmed", "Booked", "Active", and "Complete".
- Notes:** A text input field with the placeholder text "Enter notes".

At the bottom of the form are two buttons: "Cancel" and "Save".

6

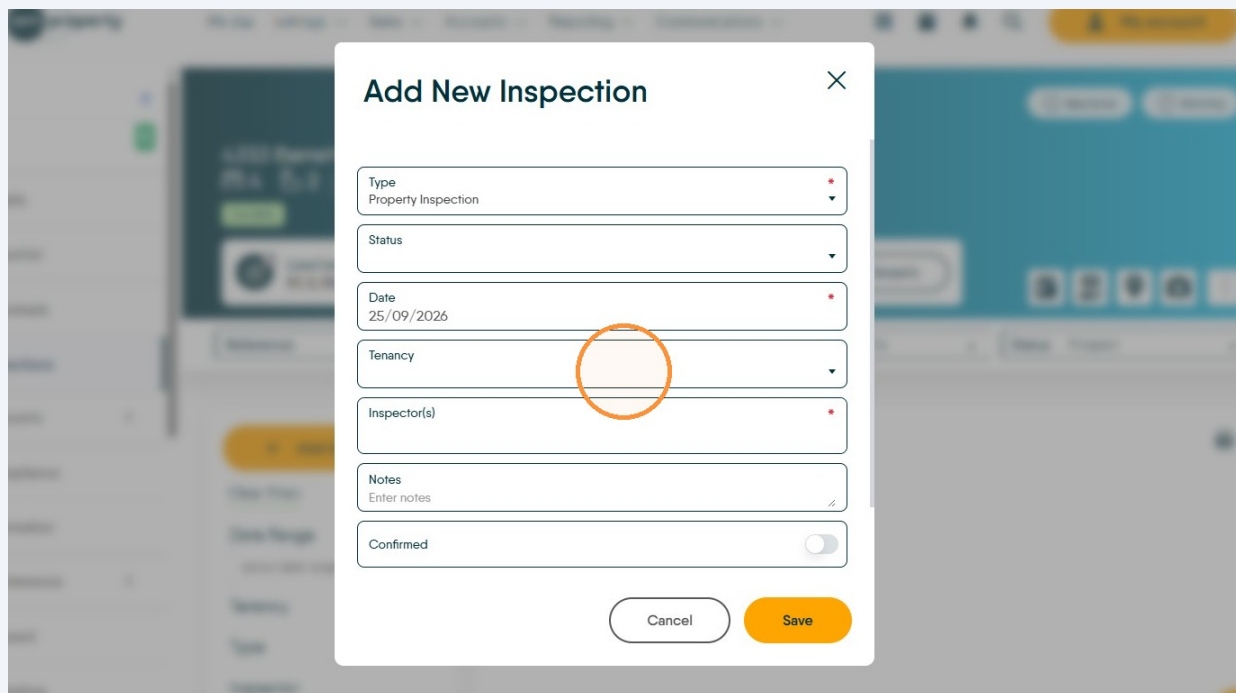
Click the **"Date"** field to set the date of the visit. The date should be the date the visit is due, however it is just an indicator of when the inspection is planned.

The screenshot shows the same "Add New Inspection" modal window. In this view, the "Date" field is highlighted with an orange circle. The "Date" field contains the text "03/09/2026". The other fields are:

- Type:** "Property Inspection"
- Status:** A dropdown menu (closed)
- Tenancy:** A dropdown menu (closed)
- Inspector(s):** A text input field
- Notes:** "Enter notes"
- Confirmed:** A toggle switch (currently off)

The "Cancel" and "Save" buttons are at the bottom.

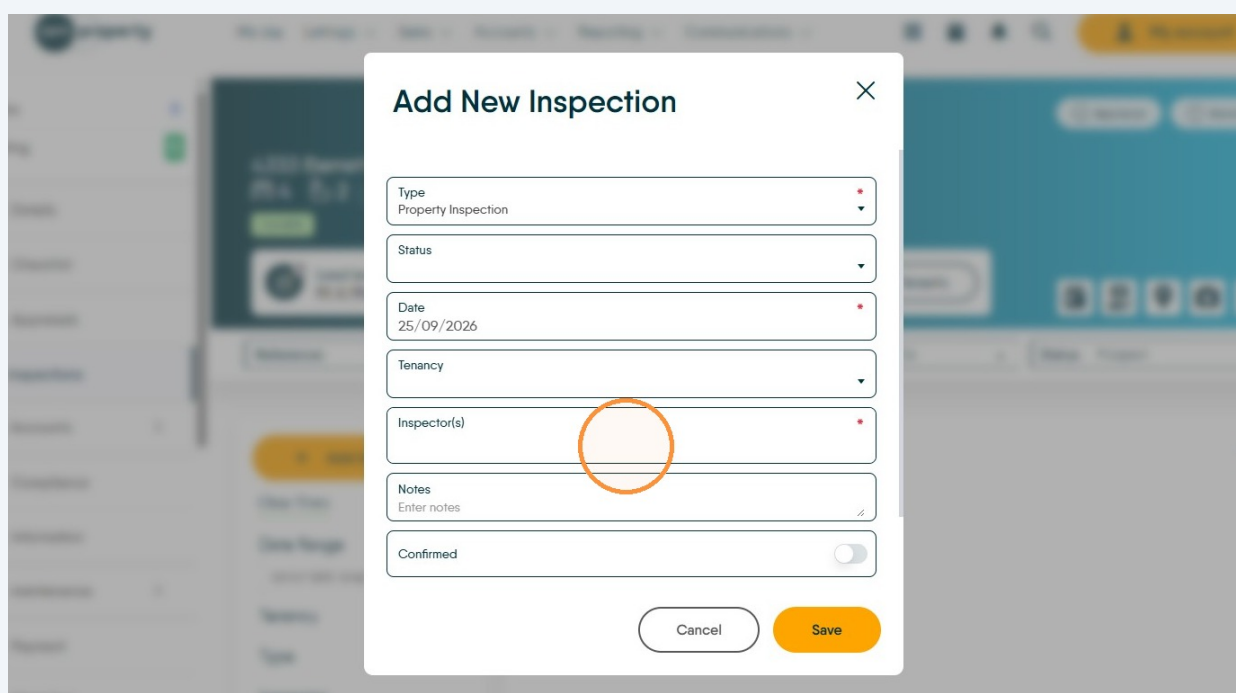
- 7 If there is a tenancy on the property then you can select that in this menu.



The screenshot shows a modal window titled "Add New Inspection" with a close button (X) in the top right corner. The form contains the following fields: "Type" (dropdown menu with "Property Inspection" selected), "Status" (dropdown menu), "Date" (text field with "25/09/2026"), "Tenancy" (dropdown menu, highlighted with an orange circle), "Inspector(s)" (text field), "Notes" (text area with placeholder "Enter notes"), and "Confirmed" (toggle switch). At the bottom are "Cancel" and "Save" buttons.

- 8 Click into the **"Inspectors"** menu and select the person you are planning on completing the inspection.

At this point, this doesn't need to be the person who will perform the inspection, the name could just be a placeholder for pre planned inspections, for example if you plan 3/6/9 month Inspection all at the same time, you might use the name of the person planning the inspections and change this later on.



This screenshot is identical to the one above, showing the "Add New Inspection" form. In this instance, the "Inspector(s)" text field is highlighted with an orange circle, indicating where the user should click to select an inspector from the "Inspectors" menu.

The screenshot shows a web application interface with a modal window titled "Add New Inspection". The modal contains several form fields: "Type" (set to "Property Inspection"), "Status", "Date" (set to "25/09/2026"), and "Tenancy". The "Inspector(s)" field is open, displaying a list of users: "VTUK USER", "David-George Morgan", "Training Dave", "James Morgan", and "Brooke Morgan". An orange circle highlights the "James Morgan" option in the list. The background shows a blurred view of the application's sidebar and main content area.

- 9 Click the "**Notes**" field and add any notes on the inspection.

The screenshot shows the same "Add New Inspection" modal window. In this step, the "Inspector(s)" field now contains "James Morgan" with a close button (X). The "Notes" field, which has a placeholder text "Enter notes", is highlighted with an orange circle. At the bottom of the modal, there are "Cancel" and "Save" buttons. The background remains the same blurred application interface.

Add New Inspection ✕

Type
Property Inspection

Status
Pending

Date
25/09/2026

Tenancy

Inspector(s)
James Morgan ✕

Notes
3 mth Inspection

Cancel Save

- 10** If the visit has been **"Confirmed"** with your tenant select the confirmed option.

If you want to add the Inspection to your **"Calendar"** in CRM then select the Calendar toggle.

Add New Inspection ✕

Status
Pending

Date
25/09/2026

Tenancy

Inspector(s)
James Morgan ✕

Notes
3 mth Inspection

Confirmed ☐

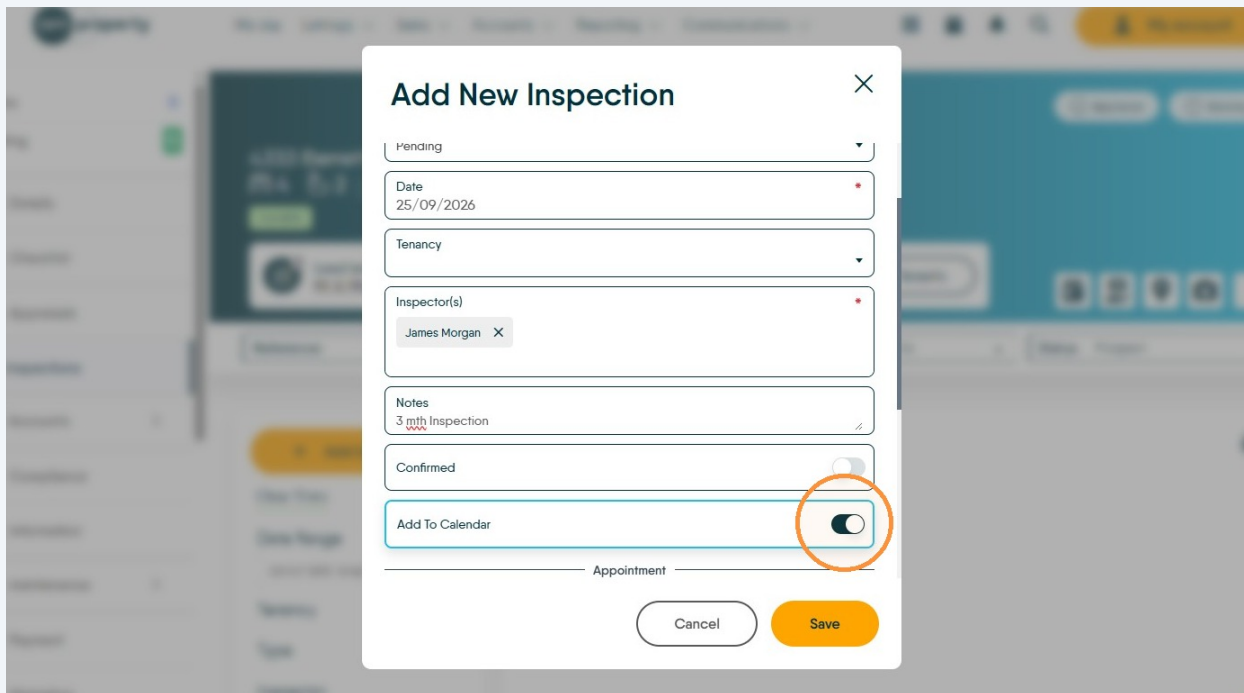
Add To Calendar ☐

Cancel Save

- 11 If you are not adding the Inspection to the calendar at this point then select **"Save"** and save the record.

Calendar Appointment

- 12 Selecting the **"Add to Calendar"** toggle gives you the option of



The screenshot shows a modal form titled "Add New Inspection" with a close button (X) in the top right corner. The form contains several fields: a dropdown menu set to "Pending", a date field showing "25/09/2026", a dropdown menu for "Tenancy", a text field for "Inspector(s)" containing "James Morgan" with a remove icon (X), a text field for "Notes" containing "3 mth inspection", a "Confirmed" checkbox, and a toggle switch for "Add To Calendar". The "Add To Calendar" toggle is currently turned off and is circled in orange. Below the toggle is a label "Appointment". At the bottom of the form are two buttons: "Cancel" and "Save".

- 13 The date for the appointment is the date that was set earlier in the process.

- 14 Click the **"Start Time"** field and set the time for the appointment

×

Add New Inspection

Add To Calendar

Appointment

Start Time

Select time

Duration

15 Mins

Users

Branch

Morgan & Co

Calendars

Cancel

Save

×

Add New Inspection

Add To Calendar

Appointment

Start Time

14:20

13

14

15

↑

↓

15

20

25

↑

↓

Users

Branch

Morgan & Co

Calendars

Cancel

Save

- 15 In **"Users"** select the actual person conducting the appointment.

The screenshot shows the 'Add New Inspection' form. The 'Add To Calendar' toggle is turned on. The 'Appointment' section shows a 'Start Time' of 14:20. Below this, there are two date pickers: the first is set to 14 (month 13, year 15) and the second is set to 20 (month 15, year 25). The 'Users' dropdown menu is open, showing a list of users: VTUK USER, David-George Morgan, Training Dave, James Morgan (highlighted with an orange circle), and Brooke Morgan. At the bottom of the form are 'Cancel' and 'Save' buttons.

- 16 Click the **"Calendar"** field and select the Calendar you want to add the appointment to, this would normally be the 'Lettings' calendar.

The screenshot shows the 'Add New Inspection' form. The 'Add To Calendar' toggle is turned on. The 'Appointment' section shows a 'Start Time' of 14:20. Below this, there are two date pickers: the first is set to 14 (month 13, year 15) and the second is set to 20 (month 15, year 25). The 'Users' dropdown menu is closed, and 'James Morgan' is selected. Below the 'Users' field, there is a 'Branch' dropdown menu set to 'Morgan & Co'. The 'Calendar' dropdown menu is highlighted with an orange circle. At the bottom of the form are 'Cancel' and 'Save' buttons.

The screenshot shows a modal window titled "Add New Inspection" with a close button (X) in the top right corner. The form contains several fields: "Add to Calendar" with a toggle switch, "Appointment" with a horizontal line, "Start Time" set to "14:20", a date/time picker showing "14" and "20", "Users" with "James Morgan" and a close button, "Branch" set to "Morgan & Co", and a "Calendars" section with a list: "Sales", "Lettings" (highlighted with an orange circle), "Annual Leave", "Paul's Diary", and "Paul's diary".

Save Inspection

17 Click **"Save"**

This screenshot shows the same "Add New Inspection" modal window. In this step, the "Lettings" calendar is selected in the "Calendars" list, and the "Save" button at the bottom right is highlighted with an orange circle. The "Cancel" button is also visible next to it.