# Inspections Setup

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New Inspection records are setup and maintained on a customer's System record.  Inspection records may be setup by right-clicking on the Inspections option of the Customer Tree at the System level and selecting the New Inspection option.

You may also access the Inspection setup form by opening a System record in edit mode [from the Customer Explorer], then navigating to the Inspections tab [of the system record] then click on the New button.

The  System Inspection Record is divided into four possible tabs.  The only required tab is the Detail tab.

## Detail Tab

The main data entry form is the Detail tab which contains several data entry fields.
There are three basic ways an Inspection Ticket will be billed; On a time and material basis, a pre-negotiated flat rate, and pre-paid through cycle invoicing.  Depending on the way the Inspection will be billed, will depend on which fields you need to populate on the Detail tab of the System Inspection setup.

On the left side of the form, from the Description field down to the Next Inspection Date are filled in for all types of Inspection setup.

At the bottom center of the form are two fields; Inspection Item and Amount.  These fields would only be used if a pre-negotiated amount is to billed to the customer each time an Inspection is performed.

Each data entry field is described below.

The fields on the right-hand side of the form are used for SedonaOffice customers using Group Tickets.  Group Tickets is a feature that is not activated unless your company requests this feature.  Before our Support Representatives will begin supporting your company with this feature, you must first read all the documentation on this topic and sign up for a training class.  This training is billable.  For detailed information on Group Tickets functionality, click on the link.

### Detail Tab Data Entry Fields

Fields denoted with an asterisk are required.

- **Description* -** Enter a description for the inspection.  This is for internal company use only.  Maximum of 50 characters.
- **Frequency* -** From the drop-down list, select
- **Service Problem Code* -** From the drop-down list, select the appropriate code.

- **Service Level* -** From the drop-down list, select the appropriate code.
    - If a service level setup for RMR Linking is selected, two more fields will open: Recurring Item Link and Cycle Amount. Select the Recurring Item Code from the drop-down list. The Cycle Amount will auto-fill and is view only. For more information on RMR Linked Inspections, click on the link.
- **Service Company* -** From the drop-down list, select the appropriate code.
- **Last Inspection -** If the date on which the last inspection was completed is known, enter here. You may leave this field blank.
- **Next Inspection* -** Enter the date of when the next inspection is due.
- **Next Inspection At* -** From the drop-down list, select the appropriate code. This controls when the Next Inspection Date will be advanced on a currently open Inspection Ticket.
- **Service Tech -** If there is a particular technician that should perform this inspection, select a name from the list. When an Inspection Ticket is generated, this name will auto-fill into the Technician field of the Service Ticket form.
- **Route Code* -** If your company has activated Route Scheduling, from the drop-down list, select the appropriate code.
- **Notes -** Typically these are special instructions for the inspector. Each time an Inspection Ticket is generated, a note with this text will be added to the ticket.
- **Inspection Item -** If your customer has contracted to pay a flat amount each time the inspection is performed, select the appropriate code from the drop-down list. This item will be added to the Other charges tab each time an Inspection Ticket is generated.
- **Amount -** If a selection was made in the Inspection Item field, enter the amount to invoice the customer.

## Equipment Tab

The Equipment form was previously used to create a list of Parts that should be inspected during an Inspection appointment.

Previously these parts would display on a separate tab of the Inspection Ticket and would also print on the Inspection Ticket. The Inspection Ticket Equipment List and Inspection Ticket print were revised to no longer display the information entered on this tab. Now the Equipment List displayed on the Inspection shows all Equipment on the System Equipment List.

You may create a list of parts to be inspected if you will be using the Part Number Filter Option during Inspection Ticket generation, or you may create this list for internal company use only. Your company has the option of designing custom reports based on the information listed in this form.

When adding equipment items to this list, when clicking the drop-down arrow in the Part Code field, the software will display a list of parts from the System Equipment List.

## Inspection Items Tab

This form is used to list devices and quantities to be inspected.  The purpose of this form is to setup the devices for which your company is under contract to inspect.  Once the Inspection has been performed and the Technician reports how many of each device was inspected, you may enter the actual number of devices inspected.  The records entered on this form are for informational purposes only.  This information is not linked to the System Equipment List.
The Description field is a drop-down list of choices your company sets up and maintains in the SedonaSetup table Inspection Items.

## Reports Tab

This form is used to create a list of reports that you want to attach each time an Inspection Ticket is generated.

If reports are attached to a System Inspection record, when an Inspection Ticket is generated, these are displayed on the ticket Documents tab in the lower tier labeled Inspection Reports.