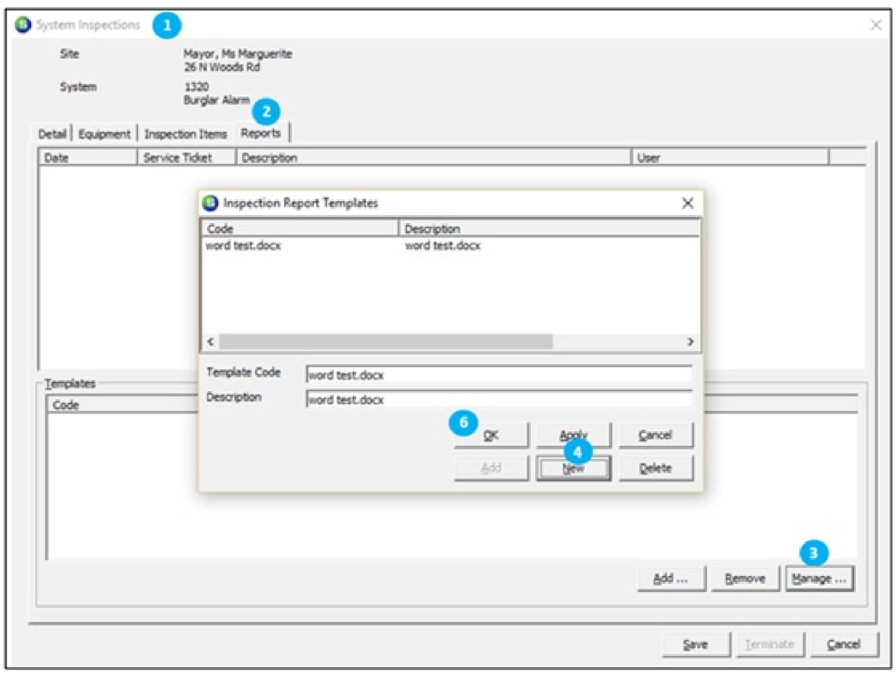
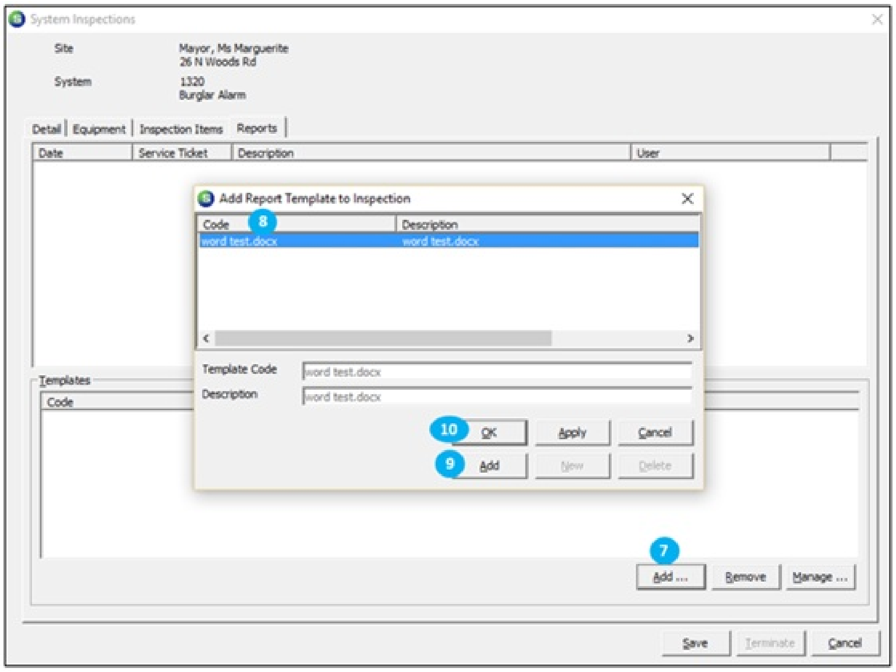
How to Add Inspection Reports to an Inspection Record

Last Modified on 09/23/2024 5:40 pm EDT

To Add Inspection Templates navigate to the inspection record on the customer, and follow the steps below.

1. Open the Inspection record
2. Select the Reports tab
3. Click Manage...
4. Click New
5. Browse for your template document
6. Click Okay
7. Still on the Reports tab, click Add...
8. Select the template you just created
9. Click Add in the smaller pop up window
10. Click Okay




System Inspections
Site
Mayor, Ms Marguerite
26 N Woods Rd
System
1320
Burglar Alarm
Detail
Equipment
Inspection Items
Reports
Date
Service Ticket
Description
User
Add Report Template to Inspection
Code
Description
word test.docx
word test.docx
Template Code
word test.docx
Description
word test.docx
10
OK
Apply
Cancel
9
Add
New
Delete
Templates
Code
7
Add ...
Remove
Manage ...
Save
Terminate
Cancel
8