

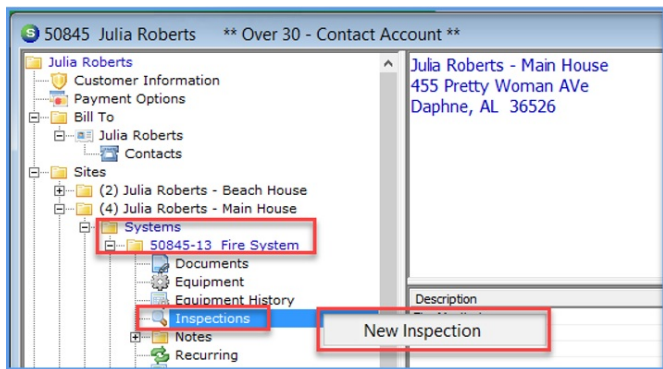
Creating an Inspection Record at the Customer System Level

Last Modified on 06/29/2026 3:08 pm EDT

An Inspection Record can be created at the System Level on a Customer Account.

Go to the Customer System and Right-click on "Inspections."

Select "New Inspection."



Below is an explanation of each field shown on the Inspection Record.

A screenshot of the 'Inspection' form. The fields and their values are: 'Description' (Annual Fire Inspection), 'Frequency' (Annual), 'Service Problem Code' (Insp-Fire-AN), 'Service Level' (Fire Inspection), 'Service Company' (ABC Service Provider), 'Last Inspection' (empty), 'Next Inspection' (8/1/2026), and 'Next Inspection At' (Ticket Created). Each field has a corresponding icon to its right, such as a calendar icon for the date fields.

DESCRIPTION - This field is used to describe the type of inspection associated with the record and is for internal use only. The Description field has a maximum length of 50 characters.

Example: Annual Fire Inspection, Quarterly Sprinkler Inspection

FREQUENCY - This field determines how often the inspection will take place. Common frequencies include Monthly,

Quarterly, Semi-Annual, and Annual, although several additional options are available.

SERVICE PROBLEM CODE - Select the appropriate Problem Code from the drop-down list. The selected Problem Code will automatically be assigned to any Inspection Tickets generated from this Inspection Record.

SERVICE LEVEL - Select the Service Level that should be assigned to the Inspection Record. This may be different from the Service Level assigned to the System itself.

SERVICE COMPANY - The Service Company will default from the Service Company assigned at the System level. However, it can be changed within the Inspection Record if needed.

LAST INSPECTION - If the date of the most recently completed inspection is known, enter it here. When creating a new Inspection Record with no prior inspections, this field may be left blank.

NEXT INSPECTION - Enter the date the system is next due for inspection.

NEXT INSPECTION AT - This setting controls when the Next Inspection date is updated. However, it does not determine what the new inspection date will be; it only controls when the update occurs.

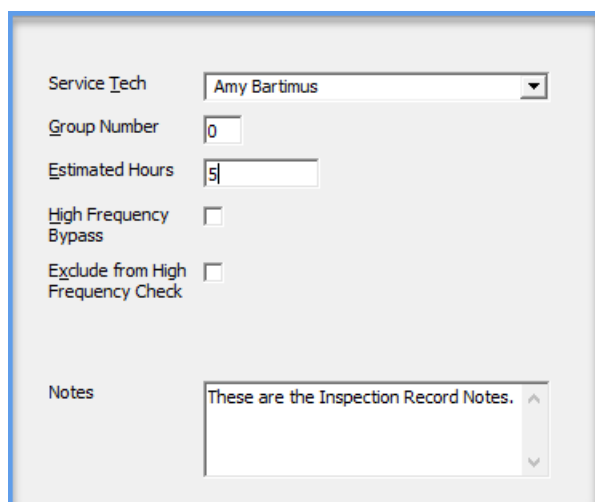
The four options are:

Ticket Created – this is the default. When the current Inspection is created.

Ticket Scheduled – When an Appt is added to the current open Inspection Ticket

Ticket Resolved – When the current Inspection is Resolved.

Ticket Closed – When the current Inspection is closed.



The screenshot shows a form with the following fields and options:

- Service Tech**: A dropdown menu with "Amy Bartimus" selected.
- Group Number**: A text input field containing "0".
- Estimated Hours**: A text input field containing "5".
- High Frequency Bypass**: A checkbox that is unchecked.
- Exclude from High Frequency Check**: A checkbox that is unchecked.
- Notes**: A text area containing the text "These are the Inspection Record Notes." with a scroll bar on the right.

SERVICE TECH - If a specific technician should perform this inspection, select their name from the drop-down list.

When an Inspection Ticket is generated, the selected technician will automatically populate the Technician field on the ticket.

ESTIMATED HOURS - Enter the estimated number of hours required to complete the inspection. This information can assist with scheduling and resource planning.

GROUP NUMBER - The Group Number is used to group multiple Inspection Tickets together and invoice them on a single invoice for charges that are not billed through the Cycle Billing process. These are typically time-and-material type services.

HIGH FREQUENCY BYPASS - Select this option when a customer has multiple inspections with different frequencies that may become due during the same period, and you only want the system to generate a ticket for the least frequent inspection.

This prevents multiple inspection tickets from being generated when a more comprehensive inspection is already scheduled.

Example: A Fire System has three Inspection Records all due on January 1st:

Quarterly Visual Inspection, Semi-Annual Water Flow Inspection, Annual Visual and Equipment Testing.

When **High Frequency Bypass** is selected, the software will generate only the Annual

Inspection Ticket on January 1.

The system will then automatically advance:

The Quarterly Inspection's next due date to April 1

The Semi-Annual Inspection's next due date to July 1

EXCLUDE FROM HIGH FREQUENCY CHECK - If this option is selected, the inspection is excluded from the High Frequency Bypass logic. In the example above, the software would generate a grouped ticket containing all three inspections rather than only the Annual Inspection.

NOTES - This field is optional. Any information entered here will be transferred to the generated Inspection Ticket and displayed as a Field Note for the technician.
