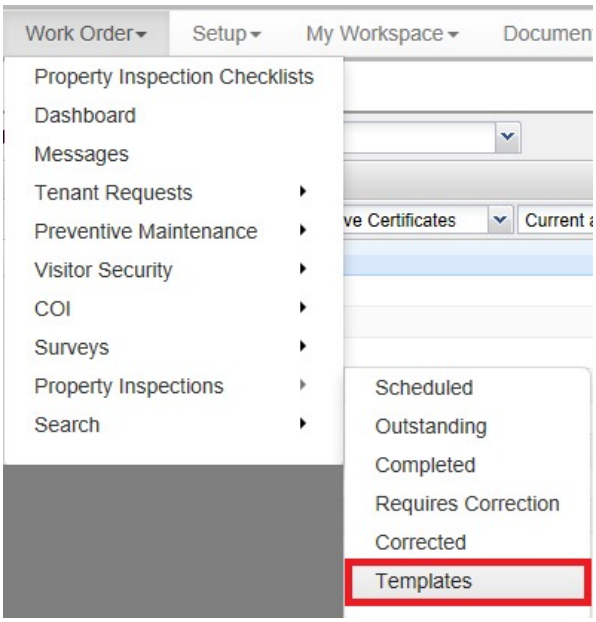
Templates

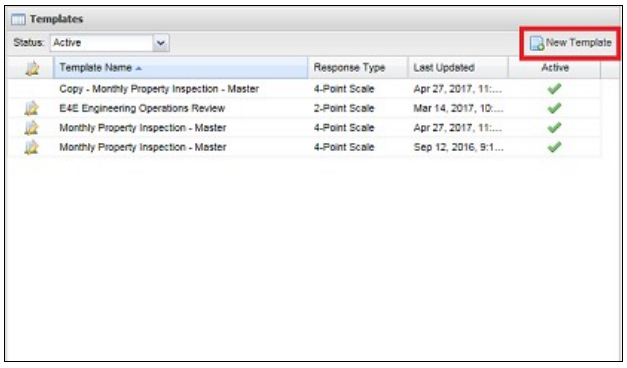
Control Panel > Work Order > Property Inspections > Templates

The Templates list display all templates that you have set up. Templates are used to create inspection schedules. The list is accessed by clicking **Work Order** and **Templates** under **Property Inspection**.

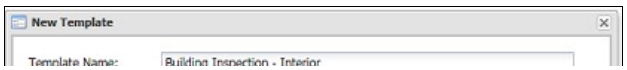


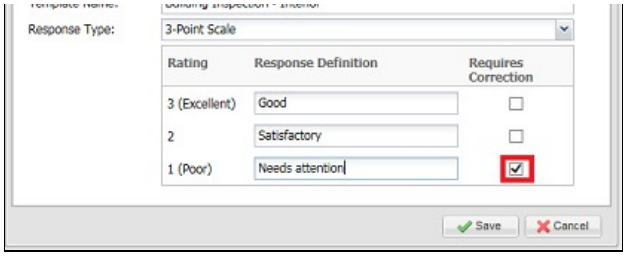
Creating an Inspection Template:

1. Click **New Template** to open a New Template popup.

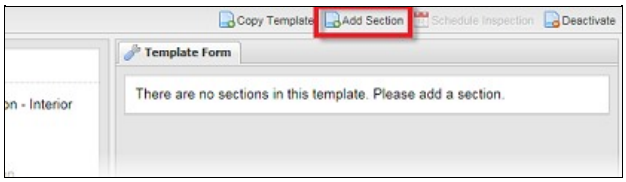


2. Enter a **Template Name**. Use the drop-down list to select a **Response Type**. You can use 2,3,4, or 5-point scale. After selecting the response type you would like to use, the window expands and provides a space to enter labels. Place a **checkmark** beside each response type that indicates a **corrective work** order must be issued. For more information review Requires Correction.

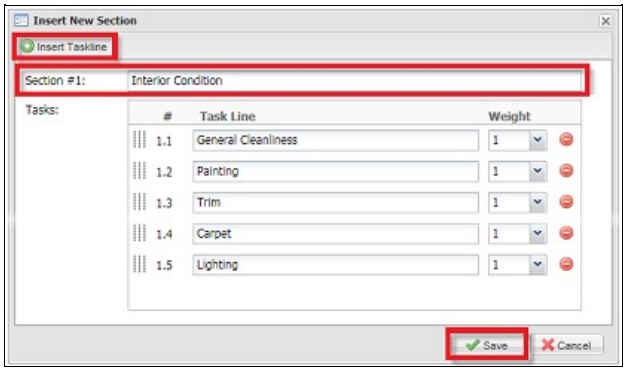




3. The template details screen is displayed. Click on **Add Section**. At least one section with tasks needs to be added to the template.



4. Enter a name in the **Section #** field. Click on **Insert Taskline**. Each Taskline has a name and a **Weight** which indicates how important it is. By default, the weight of all tasks is set to 1. A **drag-and-drop** icon ( ) is located to the left of each taskline to rearrange the orders of the tasks. The **Delete** icon ( ) is located to the right of each taskline. Once you finished entering all tasks, click **Save**.



5. Steps 5-8 can be repeated to create additional template sections. Once you are finished adding sections, you can create an **Inspection Schedule**. See Scheduled for additional information.