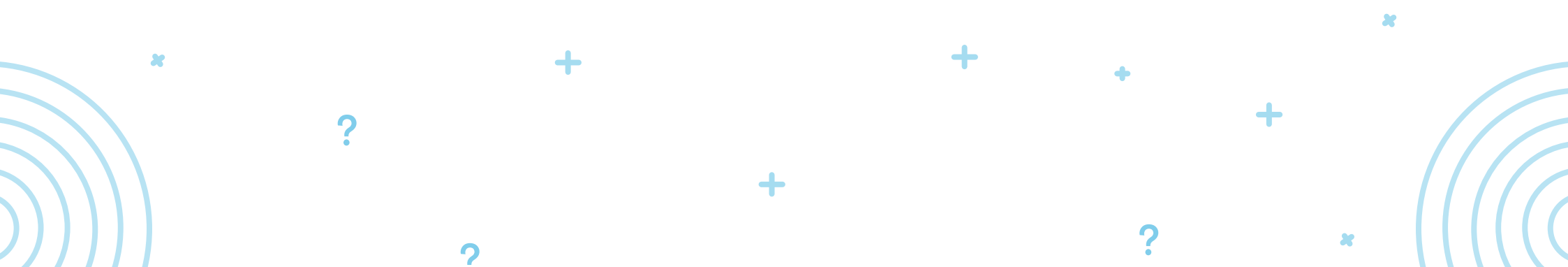




IM User Guide:

How to load inspections and properties to Inspection Manager using the Property Tree integration



Step

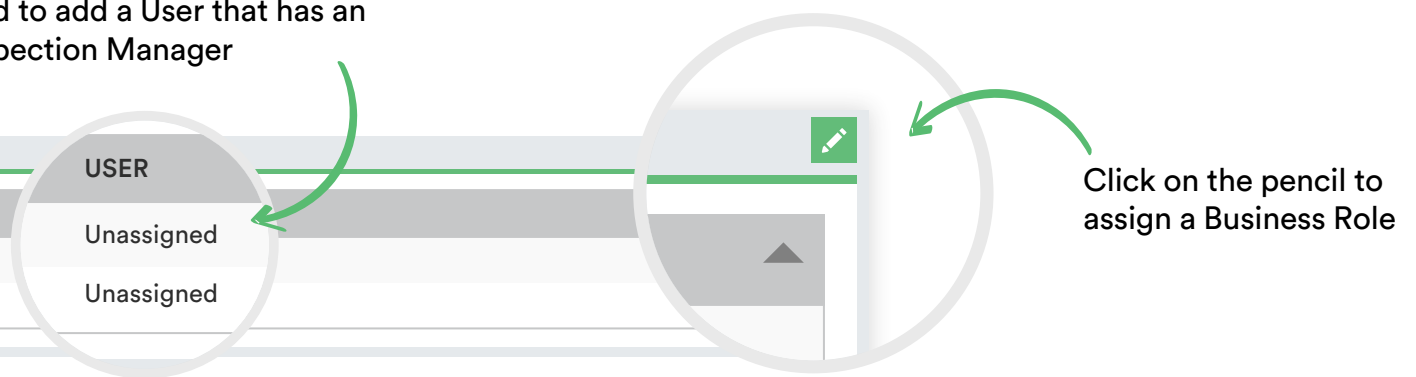
1

Please ensure you have selected a Property Manager in the business roles section of the property. (If you know how to do this, skip to step 2.)

- A. Business Roles must also be correctly assigned. Either of the following 2 scenarios will prevent a property from syncing to Inspection Manager:
 1. Property Manager Business Role is Unassigned.
 2. Property Manager Business Role is assigned to a user that doesn't match an existing Inspection Manager user.

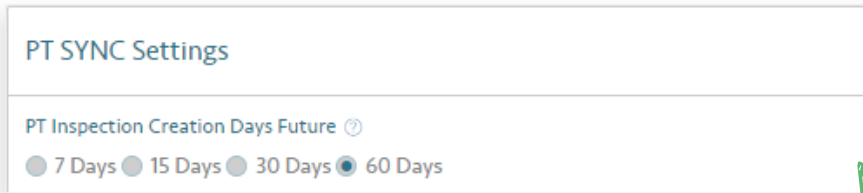
- B. Ensure that the Inspection Contact is assigned to the correct Business Role by checking the User Management section under Configuration. By default, the Inspection Contact will be assigned to the same business role as the Property Management contact. This can be changed or updated by anyone with Administrator access via the User Management section of the Configuration tab.

If you read the word “Unassigned” next to the Business Role: Property Manager, you will need to add a User that has an email that matches a user in Inspection Manager



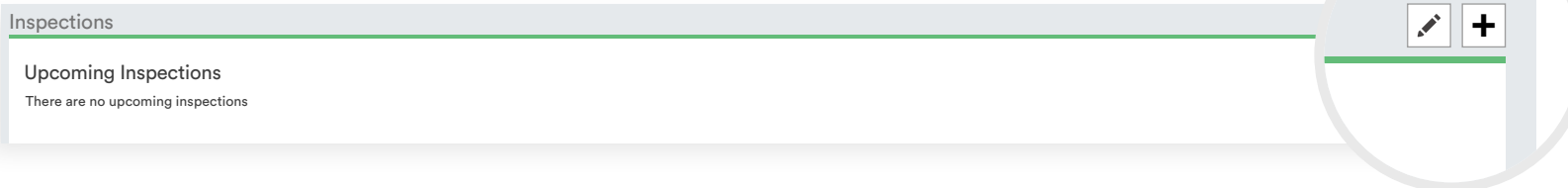
Step 2

Please ensure you have an inspection scheduled between the current time/date and the next 7, 15, 30 or 60 days depending on your office settings. (If you know how to do this skip to step 3.)



If you are unsure of your office settings, then on the Inspection Manager website please navigate to: [Settings > Scroll to bottom right of page](#)
Only accessible to Users with office Manager Access

A. If no inspections are scheduled, please navigate to the correct tenancy in Property Tree, click on the inspections tab and click the + symbol to add a new inspection for this tenancy.



Click on the + symbol to add a new inspection to a property

Step 3

Now you can trigger a manual sync between Property Tree and Inspection Manager by navigating to the Property Tree tab in Inspection Manager and clicking 'Sync now'.

(Only accessible to users with Office Manager access)

The screenshot shows the Inspection Manager interface with the Property Tree integration page. The top navigation bar includes 'Properties', 'Layout Templates', 'Users', 'Settings', 'PropertyTree', and 'Support'. The main content area is divided into two sections: 'Syncs' and 'Sync Details'.

Time	Properties Synced	Properties With Issues	Type	Status	View
09:19:38 AM	19/19	0/19	Manual	Successful	View
09:18:21 AM	19/19	0/19	Manual	Successful	View
09:15:08 AM	19/19	0/19	Manual	Successful	View
09:11:58 AM	19/19	0/19	Manual	Successful	View
09:10:36 AM	19/19	0/19	Manual	Successful	View

The 'Sync Details' section shows 'Auto Sync: Off', 'Frequency:', and 'Excluded Fields:'. Below this is the 'Manual PT Sync' section with a 'Sync now' button and a 'Contact Support' button. A message asks 'Has your sync failed or stalled?'.

Alternatively your property/inspection will be brought across overnight during the automatic daily sync.



If your property/inspection still does not appear in Inspection Manager, please contact support using the details below

Phone:

1300 22 88 32 | 02 9264 6299

Email:

support@inspectionmanager.com

Live Chat:

www.inspectionmanager.com

