

Inspections: Inspection Tracker & Archives

Inspections are a large part of everyday operations at Hi-Speed. With that in mind, recent updates in the CRM to provide for quick access to what inspections are coming up and the status of those inspections along with access to all inspection related jobs per customer become valuable.

The Inspection Tracker

[CLICK HERE TO VIEW THE INSPECTION TRACKER.](#)

Keeping up with Inspections for all your customers isn't a simple task. The CRM is trying to make this easier for you. The following are goals for the inspection tracker:

1. WHO ARE THE CUSTOMERS AND WHEN WAS THE LAST INSPECTION?
2. HOW DOES THE INSPECTION TRACKER DETERMINE WHEN THE NEXT INSPECTION SHOULD OCCUR?
3. WHERE ARE WE IN THE PROCESS OF THE NEXT INSPECTION
 - a. Has it been quoted?
 - b. Are we awaiting a PO?
 - c. Have we received a PO?
 - d. Has it been scheduled?
 - e. Is it Past Due based on schedule date?

WHO ARE THE CUSTOMERS AND WHEN WAS THE LAST INSPECTION?

The **Invoiced Report** is the primary source for pulling all inspection data. The list is filtered by most recent invoices per customer for results that include the **HR** department with a job type of **HI**. The date of the last inspection invoice date is pulled during this same procedure. If the invoice isn't labeled HR and HI then it will not be associated with the Inspection Tracker.

HOW DOES THE INSPECTION TRACKER DETERMINE WHEN THE NEXT INSPECTION SHOULD OCCUR?

The renewal date of inspections depends on the number of occurrences found within the Invoiced Report during a 365-day period. You will see the number of those inspections found in "Num Insp's" column of the report. You can also filter on whether those are Single or Multiple Inspections as well.

Inspection Tracker Upcoming 90 days

ZN	CUSTOMER	SALES	CREATED	INVTMT.	LAST INSP	ORDER#	EST NEXT	NUM INSPS	DAYS SINCE LAST	RECENT QUOTE	STAGE
1A M	SFL OF TN, LLC 4758 Huntington Road, Memphis, TN 38118	TWIG	AMS	8993.68	01/24	J151853	01/24	12	29		Recently Invoiced
1A M	LANXESS 2571 FITE RD, MILLINGTON, TN 38053	TWIG	AMS	5400.00	01/24	J151867	01/24	11	28	024290	Recently Invoiced
1A M	Kallogg USA, Inc. 585 Morrison Rd., Roseville, TN 38066	CEC	AMS	11405.00	01/24	J151868	01/24	13	28		Recently Invoiced

Filter Options =>

Branch All Users Zones Num Inspections Report Type All Stages All Amounts

Num Inspections
SINGLE
MULTIPLE

Inspection Tracker Upcoming 90 days

The “Multiple” inspection accounts are difficult to narrow down which date is the actual renewal date, so a manual setting of the renewal date is required for these accounts.

While the “Single” inspection accounts should be more accurate regarding renewals, it’s not perfect, but all “Single” inspection accounts should have an automated renewal date.

To fix any renewal dates or set actual renewal dates for the “Multiple” inspection accounts, click the “Update Renewal Date” icon and set the actual date.

A modal dialog box titled "Update Renewal" with a close button (X) in the top right corner. The dialog contains a text area for notes with the prompt "Please provide note below for reason of updating the renewal date." Below the notes is a "Renewal Date" input field. At the bottom of the dialog is a prominent green button labeled "UPDATE RENEWAL DATE". The dialog is overlaid on a background showing a table with columns for dates and a button labeled "Update Renewal Date".

WHERE ARE WE IN THE PROCESS OF THE NEXT INSPECTION?

Having stages allows for a quick overview of upcoming inspections.

a. Has it been quoted?

- a. When the inspection tracker updates all inspections pulled from the inspection report will pull in as “Needs Quoted”

b. Are we awaiting a PO?

- a. There are two process functions that is looked at before moving out of the “Needs Quoted” phase.
 - i. Using the Outstanding Orders report from ACS, looking at the HR/HI related quote number and the customer shipto, can the inspection be identified and moved into the “Quoted, Awaiting PO” stage.
 - ii. Has a quote been uploaded to the inspection tracker manually.



c. Have we received a PO?

- a. If the record from the Outstanding Orders report also identifies a customer PO number, then that status is moved into the “PO Received” stage.

d. Has it been scheduled?

- a. If that same record from the Outstanding Orders report identifies a PO number and a valid **due date/promise date** that status moves into the “Scheduled” stage.

e. Is it Past Due based on schedule date?

- a. If that scheduled date determined in the previous validation has since past, then the status moves in the “Past Due” stage.

The Inspection Tracker Report

Keeping consistent with other reports in the Hi-Speed CRM we have a filter option to filter by branch, zones, salespeople and stages. All columns can be clicked on for quick sorting. The account name is linked back to the account detail page. The address is linked to a map utility.

Filter Options =

Branch All Users Zone All Stages RUN DOWNLOAD

Inspection Tracker next 90 days DOWNLOAD

ZN	CUSTOMER	SALES	CREATED	INVCMT.	TYPE	LAST INSP.	ORDER#	EST NEXT	DAYS SINCE LAST	RECENT QUOTE	STAGE
1A M	Bees-Memphis, Inc. ATTN: Spencer Mullen 2426 Channel Avenue, Memphis, TN 38113	GWVY	SLN	640.00	ANNUAL	03/19	J139163	03/22	1123		Needs Quoted
2A L	Arkansas Elect Coop-DUPLICATE ATTN: P.O. Box 503, Augusta, AR 72006	TWP	SLN	975.00	ANNUAL	03/19	J095335	03/22	1121		Needs Quoted
2A L	Arkansas Rebar Company ATTN: Cade Shepherd 1222 Ariansa Dr., Benton, AR 72016	BTD	SLN	1000.00	ANNUAL	03/19	J095376	03/22	1117		Needs Quoted
1A M	FLORATINE PRODUCTS GROUP ATTN: 255 EAST SOUTH STREET, COLLIERVILLE, TN 38017	SSS	SLN	250.00	ANNUAL	03/19	J139214	03/22	1116		Needs Quoted
1C M	TRULITE GLASS & ALUMINUM ATTN: Jimmy Jones 501 East Govan Street, Grenada, MS 38901	BCZ	SLN	2560.40	ANNUAL	03/19	J139100	03/22	1116		Needs Quoted
2A L	Peterbilt Of Little Rock, LLC ATTN: Mike Ewers #1 Peterbilt Drive, North Little Rock, AR 72117	TWP	SLN	397.95	ANNUAL	03/19	J095391	03/22	1109		Needs Quoted
2A L	Yale Materials Handling ATTN: Red 305 Phillips, North Little Rock, AR 72117	TWP	SLN	445.73	ANNUAL	03/19	J085932	03/22	1109		Needs Quoted

Within the stage field of this report, you can see a few icons to perform various actions.

1. Quickly get to any jobs associated to inspections for this account.



2. The tag icon to quickly add brief notes to the Inspection Tracker.



3. The pause icon will push this inspection into the pause category until the next scheduled inspection date



4. The dollar sign in the circle icon will allow you to upload the quote sent to customer.



5. The up-arrow calendar icon will send this inspection to the call planning activity item



Additional icons of use.

To quickly see all previous inspection related invoices, to aid in verifying renewal date click the following link to view the account detail page and quickly jump to the inspection archive.

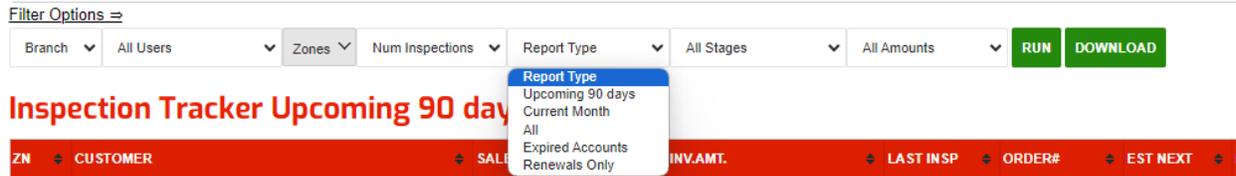
[Kimberly Clark](#)

[Maumelle Facility 500 Murphy Drive, Maumelle, AR 72113](#)



Do you feel that you have reviewed your latest inspection tracker and not found an account you know is coming up?

If you run into this problem, again look in the filter. Look at the various report types that may show you more account information beyond your default “Upcoming 90 days” view.



If you still find you are missing accounts, a stage or process appears to be missing please contact the help desk so we can track those issues. <https://portal.gohispeed.com/change-request-form.php>

