

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 your customers that have had inspections performed by Hi-Speed in the past?
2. When was the last inspection?
3. What is the frequency of those inspections?
4. Based on frequency when is the next inspection?
5. 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 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.

What is the frequency of those inspections?

The frequency of Inspection depends on the Job Description located within the Invoiced Report. A customer can have one or multiple inspections on this report based on that frequency. The difficult part of relying on this job description field is that this field is a keyed in value and although fairly accurate there can be abbreviations that are not picked up in our queries. For example

- Monthly Inspections must contain the string "month" in the job description
- Semi Annual Inspections must contain the string "semi" in the job description
- Quarterly Inspections must contain the string "quar" in the job description
- Annual Inspections become the default catch all for all others.

Based on frequency when is the next inspection?

The Inspection report will show all the inspections that have an estimated next inspection date within the last 30 days out to the next 3 months. Using calculations based on the last inspection invoice date

and the frequency of that inspection the next date is calculated based on today's date. Calculations based on frequency are as follows:

- Monthly = Last date plus 1 month if greater than current date or current date plus 1 more month if not.
- Semi = Last date plus 6 months or current date if current date is greater.
- Quarterly = Last date plus 4 months or current date if current date is greater.
- Annual = Last date plus 1 year or current date if current date is greater.

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. Using the Outstanding Orders report from ACS, looking at the HR/HI related quotes and the associated job description containing those same filters for Monthly, Semi, Quarterly and Annual descriptors, a valid quote number can be identified to move the status into the "Quoted, Awaiting PO" stage.
- c. Have we received a PO?
 - a. If that same 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 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

DOWNLOAD

Inspection Tracker next 90 days

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



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



3. The dollar sign in the circle icon will push you directly into the HI Estimate Form to create an estimate.



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

