

Inspection Workflow Checklist

Inspection ID:

Order Date:

Tasks		Date	Comments/ Person Completing Task
1	<input type="checkbox"/> Complete a Work Order and General info page		
2	<input type="checkbox"/> Inspection type?		
3	<input type="checkbox"/> E-mail Buyer-Seller Inspection Prep Checklist <small>Advise client that we require utilities to be on for complete inspection</small>		
4	<input type="checkbox"/> Verify that utilities are ON <small>Advise client that we require utilities to be on for complete inspection</small>		
5	<input type="checkbox"/> Does the house have a crawlspace?		
6	<input type="checkbox"/> Lockbox code		
7	<input type="checkbox"/> Are there special access needs or restrictions?		
8	<input type="checkbox"/> Add buyer's real estate agent to contacts		
9	<input type="checkbox"/> Add buyer's real estate agent to contacts		
10	<input type="checkbox"/> E-mail inspection agreement, mold/radon waivers		
11	<input type="checkbox"/> Schedule inspection		
12	<input type="checkbox"/> Deliver the inspection report to all recipients		
13	<input type="checkbox"/> Upload the report to Online File Folder		
14	<input type="checkbox"/> Update InterNACHI site with inspection info		
15	<input type="checkbox"/> Update inspection log		
16	<input type="checkbox"/> Complete an invoice in accounting software		
17	<input type="checkbox"/> Add payment information in accounting software		
18	<input type="checkbox"/> Record mileage		
19	<input type="checkbox"/> File Inspection report and related paperwork		
20	<input type="checkbox"/> Send a card to refering real estate agent		
21	<input type="checkbox"/> Send a thank you/comment card to client		
22	<input type="checkbox"/> Make a follow up call to client after 48 hours		
23	<input type="checkbox"/> E-mail a newsletter invitation to the client		
24	<input type="checkbox"/> E-mail a newsletter invitation to the buyer's agent		
25	<input type="checkbox"/> E-mail a newsletter invitation to the seller's agent		