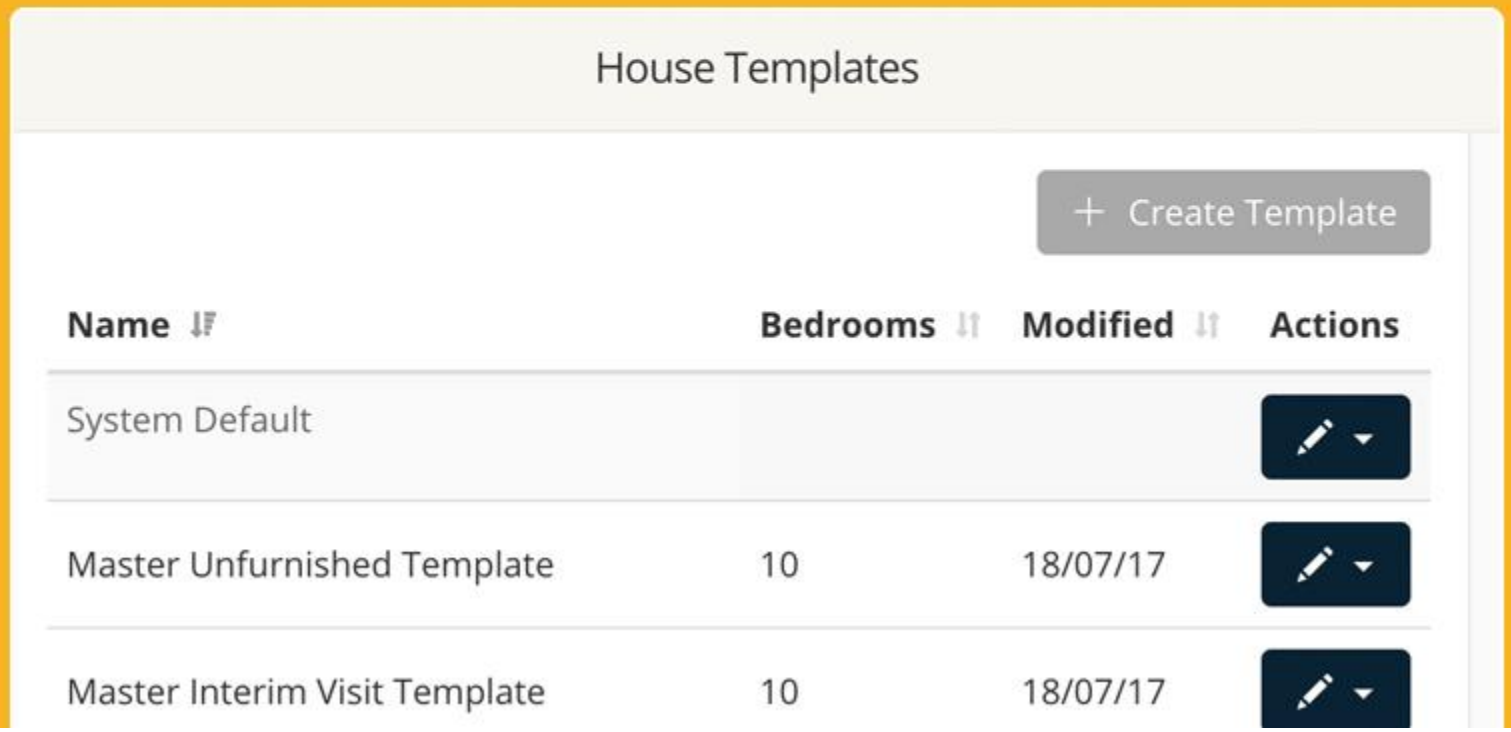
Template Time.



Templates ‘Made Easy’ Guide

This guide covers the following questions with no jargon…

1. How can templates massively reduce time spent at a property?
2. How can I choose a template, edit or create my own?
3. How do I get started using my App?

Time saving…

Templates enable you to drastically reduce time spent at a property by giving a head-start on common ‘Dispute Avoidance’ issues.

For example, with ‘Ceiling’ we’ll make the assumption they’re free of marks and mould in each room.

The screen shot on the right shows a template for an ‘Entrance/Hallway’ with **no user input**.

Room Details

The small thumbnail images in this section can be used as a reference point. **Larger copies** of these images can be found in the **'Room Image Library'** section towards the end of this report.

Entrance/Hallway

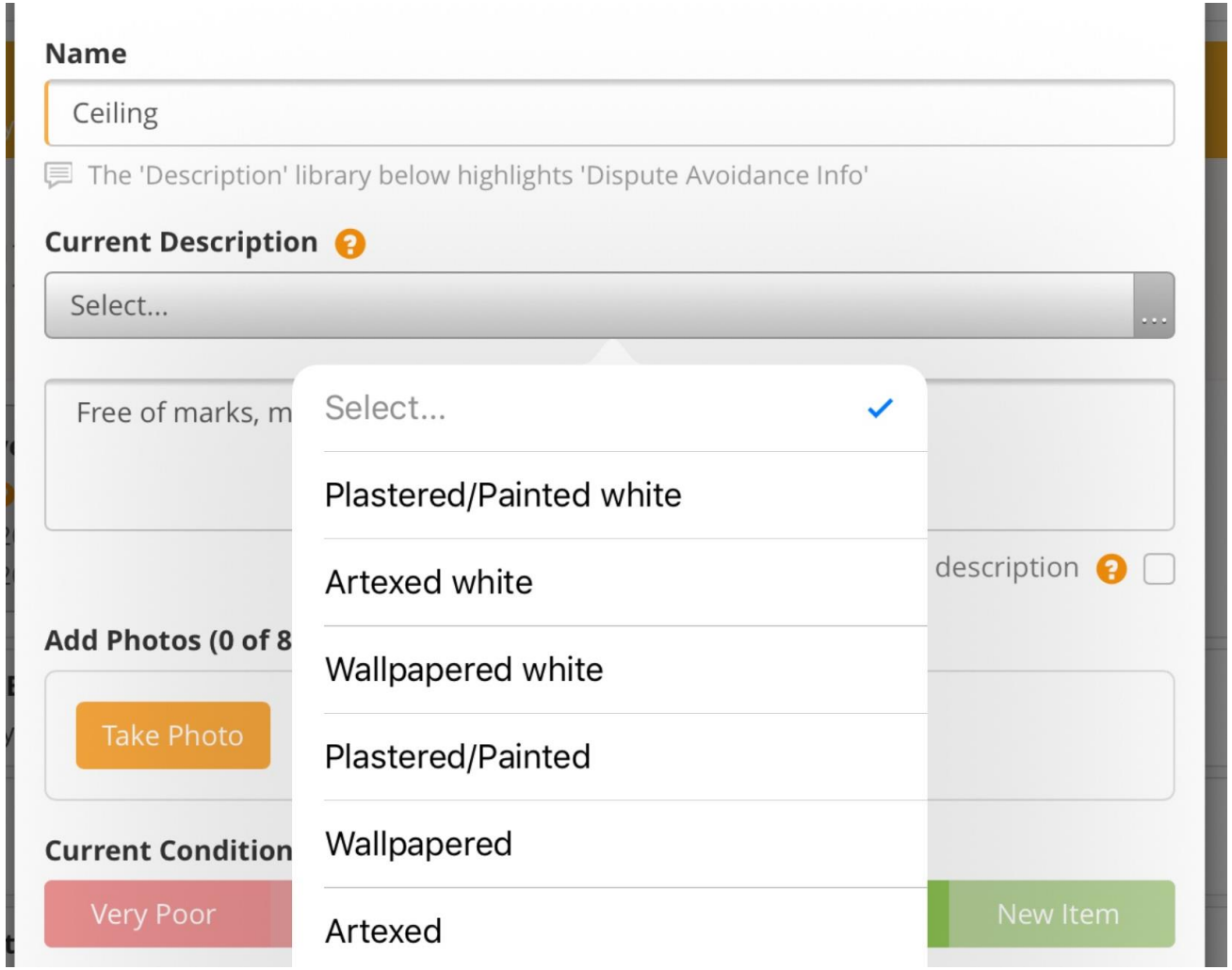
Item	Description	Condition	Cleanliness
General Overview	Clean and tidy. Neutral smell (no smoking or pet odours).	Good	Good
Front Door	Free of marks and scratches to front side and reverse. Glazing in a good clean condition.	Good	Good
Door Frame & Skirting	Free of marks, dents and dust.	Good	Good
Ceiling	Free of marks, mould and cobwebs.	Good	Good
Light Fittings	No cobwebs present to light fittings. All bulbs in working order.	Good	Good
Smoke Alarm	Ceiling mounted alarm. Test function working. Note to tenant: Please test periodically.	Good	Good
Walls	Free of marks stains and scuffs. No picture hooks, raw plug or filled holes present.	Good	Good
Windows and Sills	Sills free of marks and mould. Windows intact and free of mould to edges.	Good	Good
Radiator	Wall mounted radiator(s) free of marks and scuffs. All valve caps present and intact.	Good	Good
Sockets & Switches	All sockets and switches present and intact with no signs of damage.	Good	Good
Floor	Free of stains, marks and scratches.	Good	Good

Time saving…

Giving you a head-start means that you can then add the finer detail when at the property, or in some cases simply use the template.

Adding more detail can be done via our iOS and Android Apps (online or offline). The screen shot on the right shows detail being added in offline mode.

Tip: Our paperless InventorySign® process now enables tenants/occupants to upload a photo within the approval cycle (where appropriate). This makes our templates more powerful, as it places emphasis upon tenants to interact with their report, leading to a fair, audit trailed approach – reducing the likelihood of disputes.

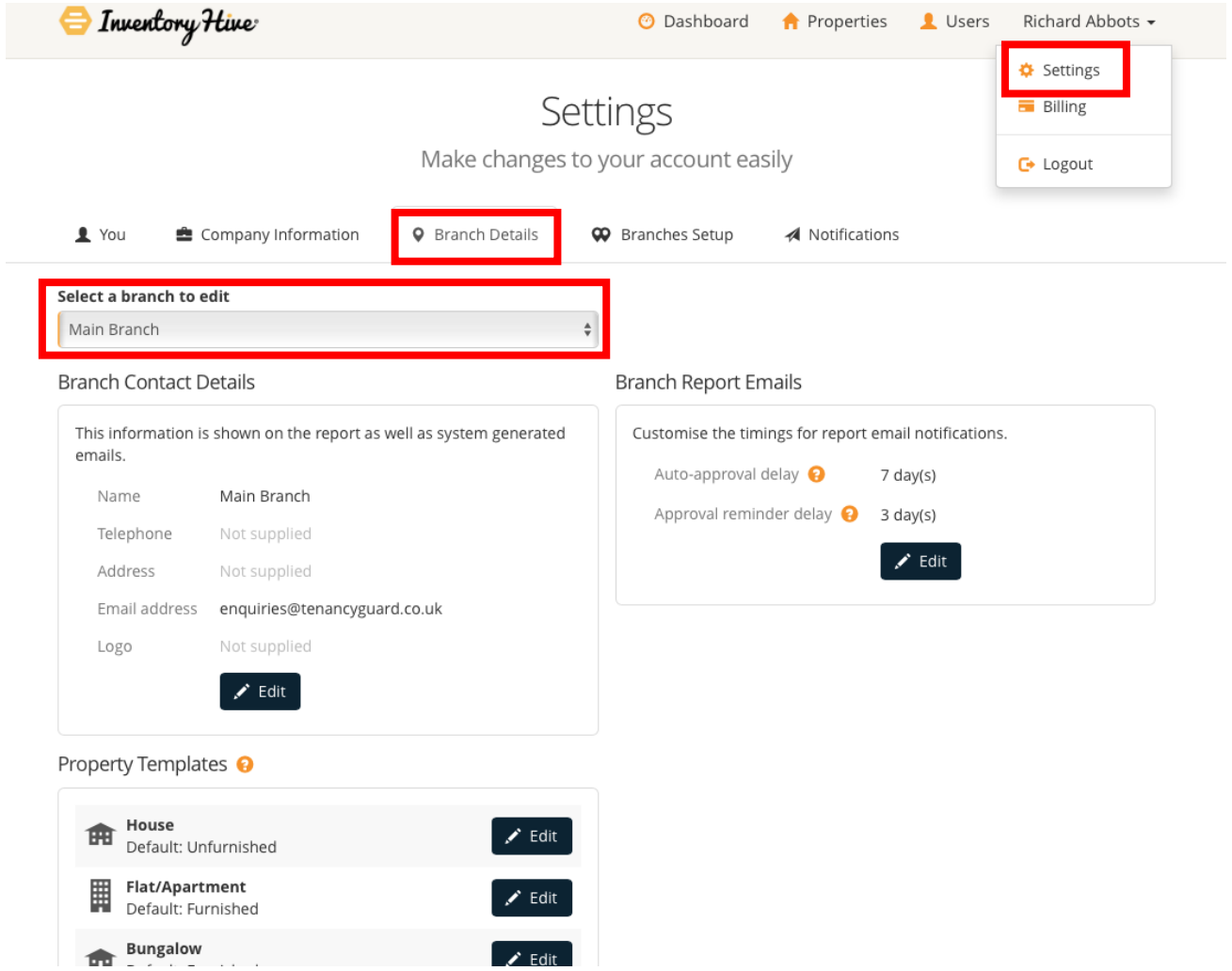


Choosing a template…

We've created some 'Off-the-shelf' templates to get you started.

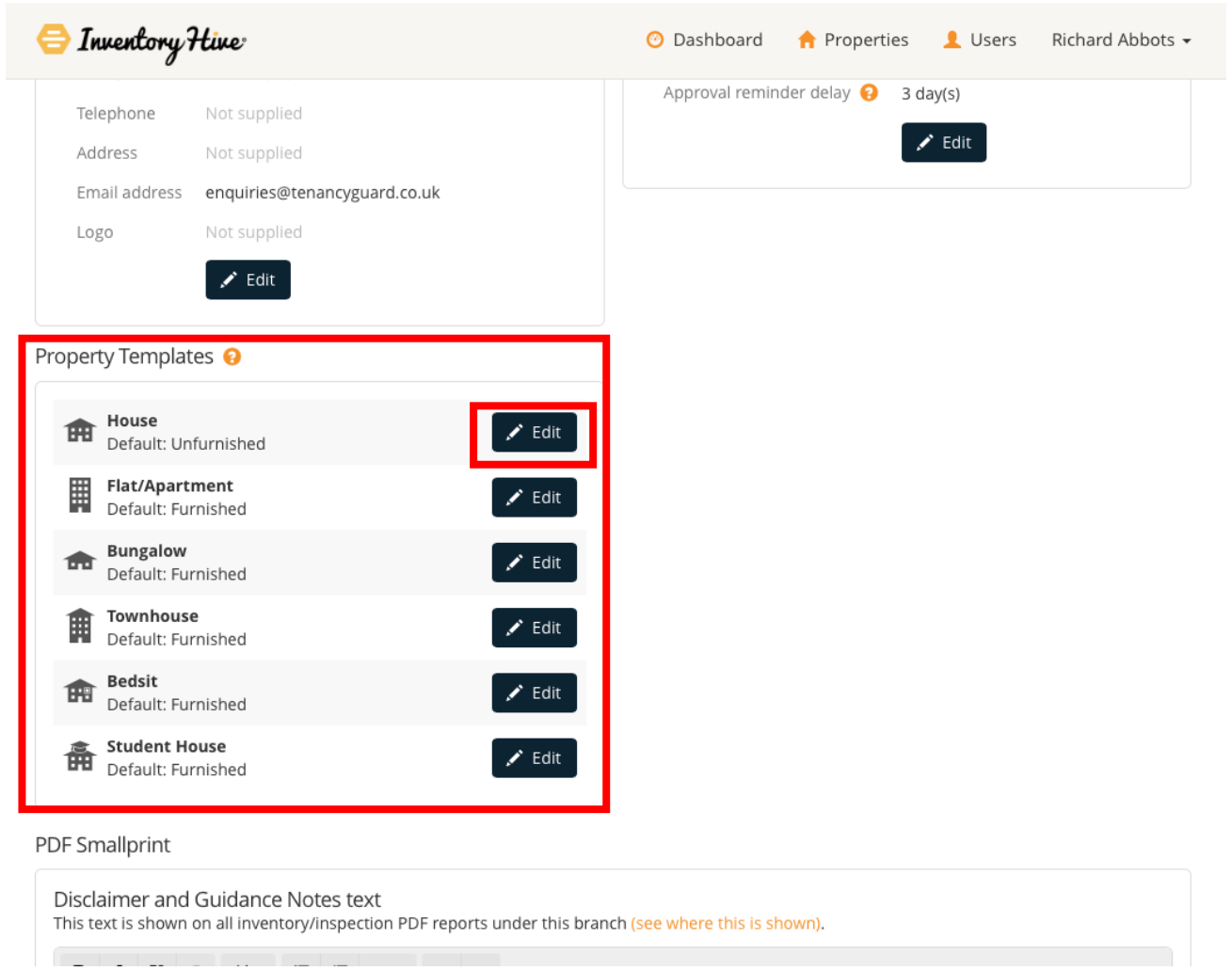
First off, you'll need to login via your web browser to load a template (not the App version). Simply visit…

Settings (top right) > Branch details > Select the branch you wish to edit (if you have more than one).



Choosing a template…

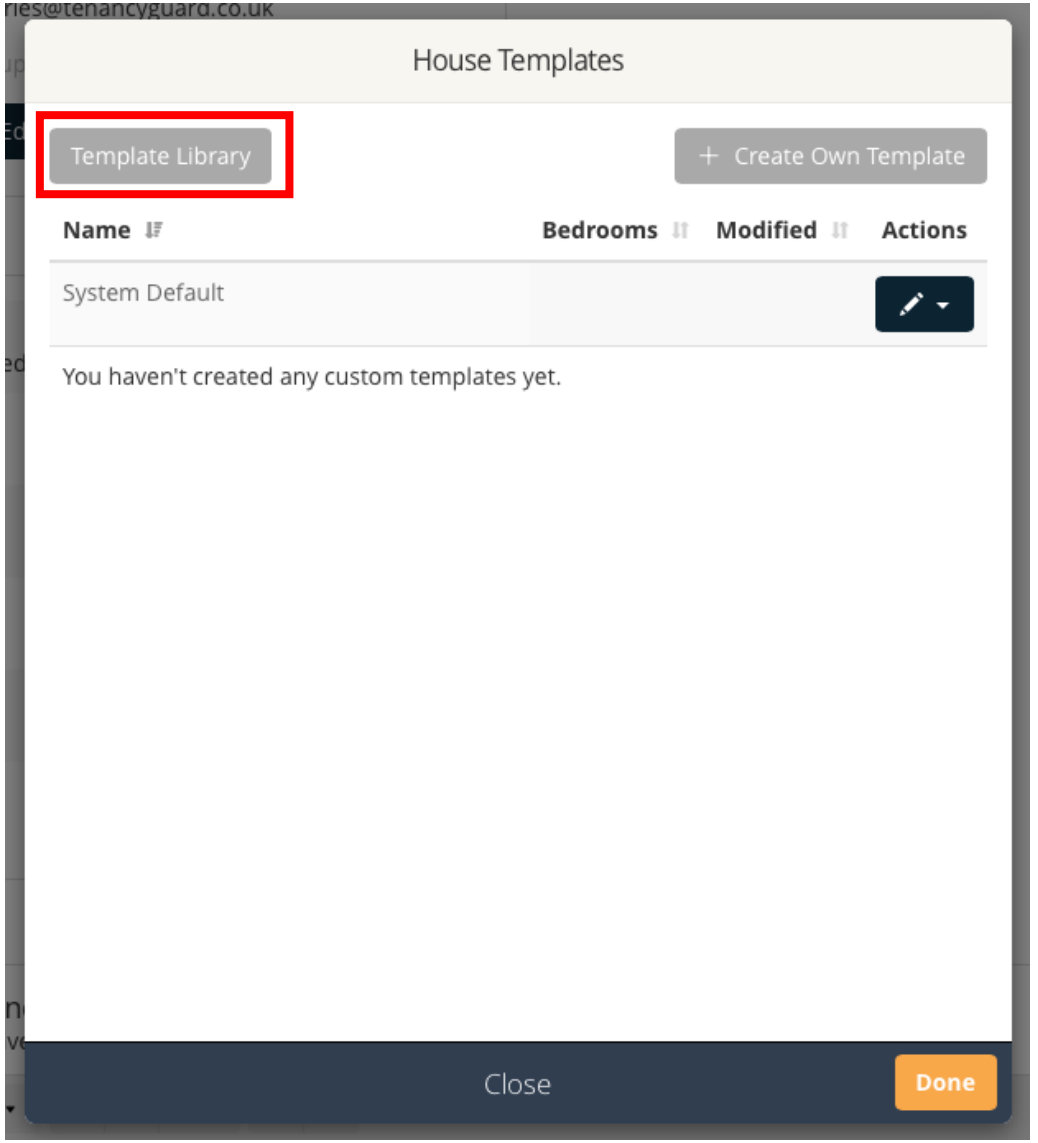
Scroll down to ‘Property Templates’ and select ‘Edit’ against the property type you wish to view.



Choosing a template…

To start with a message will be displayed to say that you haven't created any templates yet.

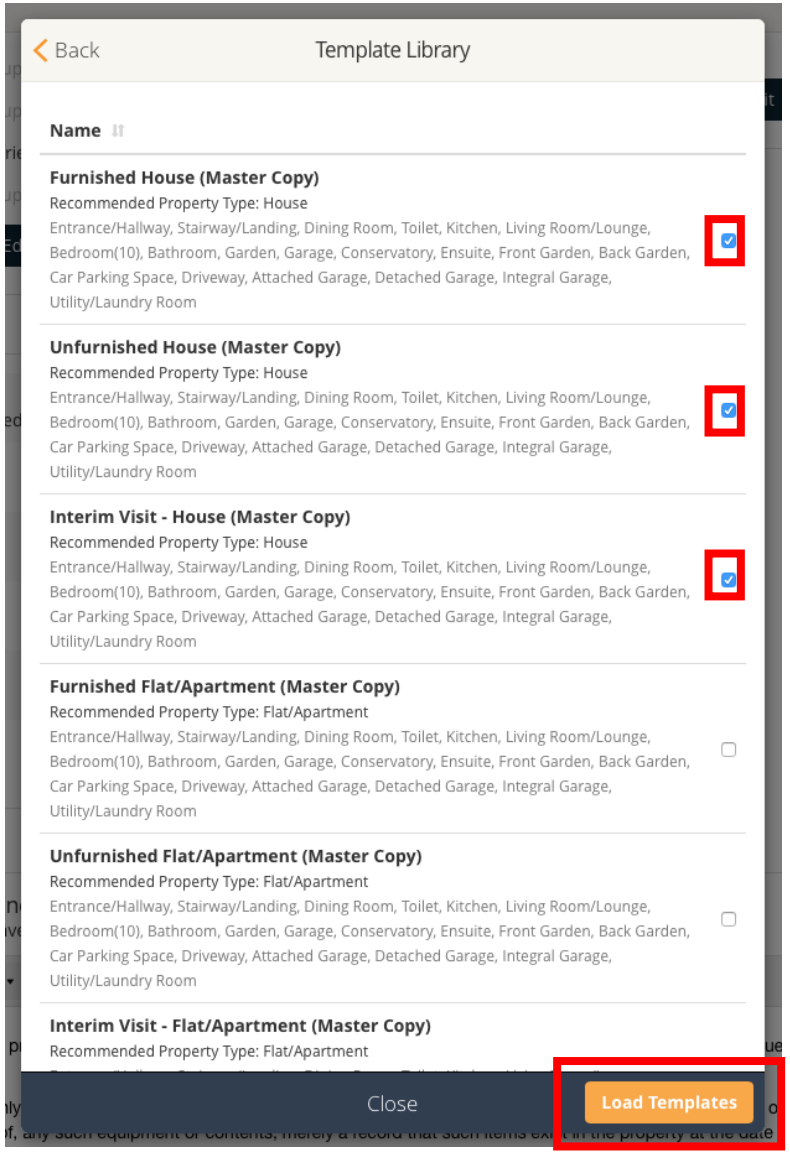
Don't worry though, we've done the heavy lifting to get you started. Simply visit 'Template Library' in the top left corner of the modal. This will take you to our 'Off-the-shelf' library.



Choosing a template…

You can then choose a template from our library and select the ones you'd like to load into your account or iOS/Android App.

After you've chosen the templates you'd like to use, simply hit 'Load Templates' (bottom right).



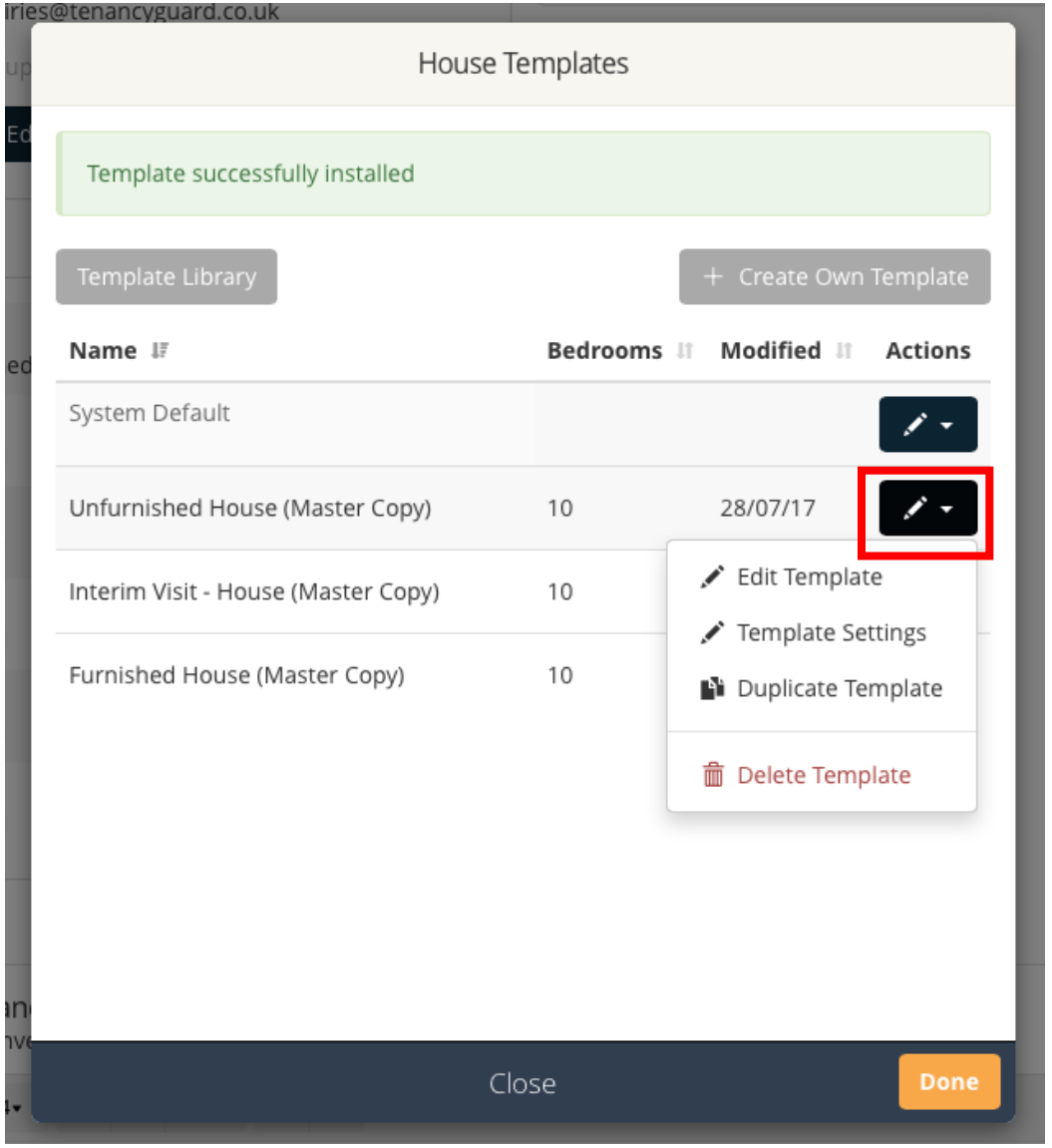
Choosing a template…

After you've loaded your template from our library a message will show to say that it's been installed. They will also show in a list for you to view at a glance (see right).

You can edit the template by choosing 'Edit Template' and also change the template name by choosing 'Template Settings'.

A template can also be duplicated to allow you to keep a master copy and then create your own from it. Simply choose 'Duplicate Template' to get started with this.

If you 'Delete Template' from our 'Off-the-shelf' library – don't worry, you can simply visit 'Template Library' (top left) and load them in again and again.

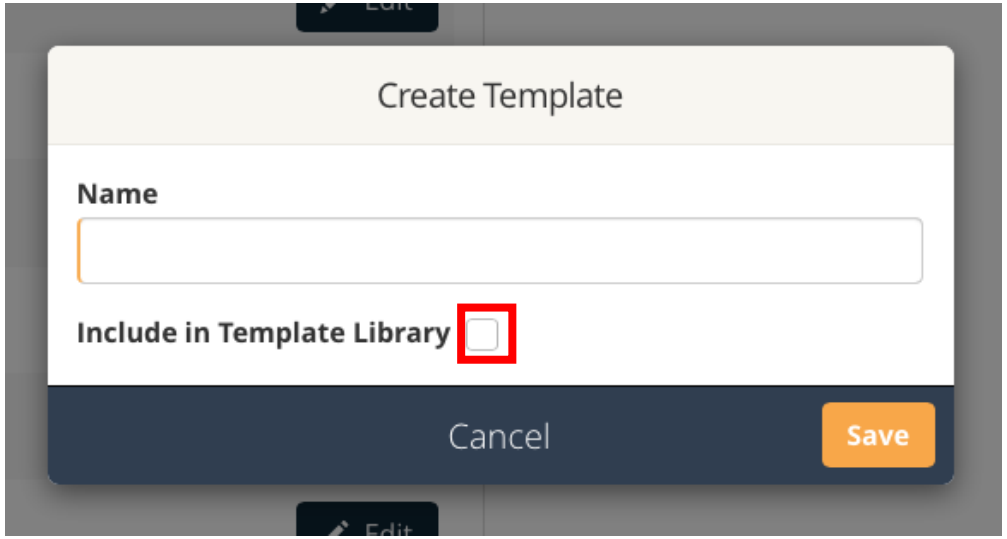


Editing & Creating…

If you don't want to use our template as a base-point and you'd rather create your own. Simply choose 'Create Template'.

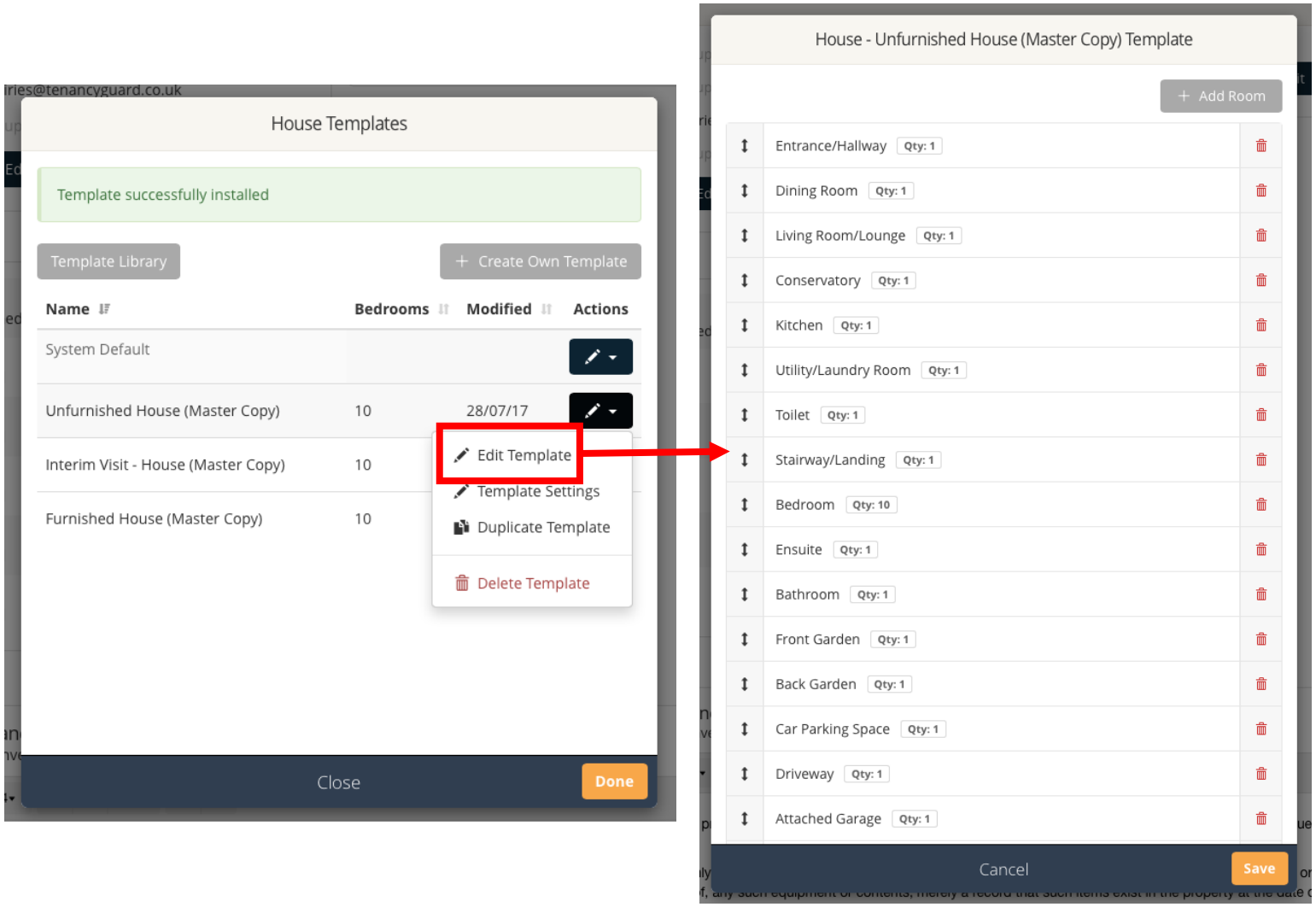
You can then name the template whatever you like (it's never shown within a report – it's for your benefit only).

Then, check the box to ensure it's installed into your library list for use via your account or iOS/Android App. Finally, hit 'Save'.



Editing & creating…

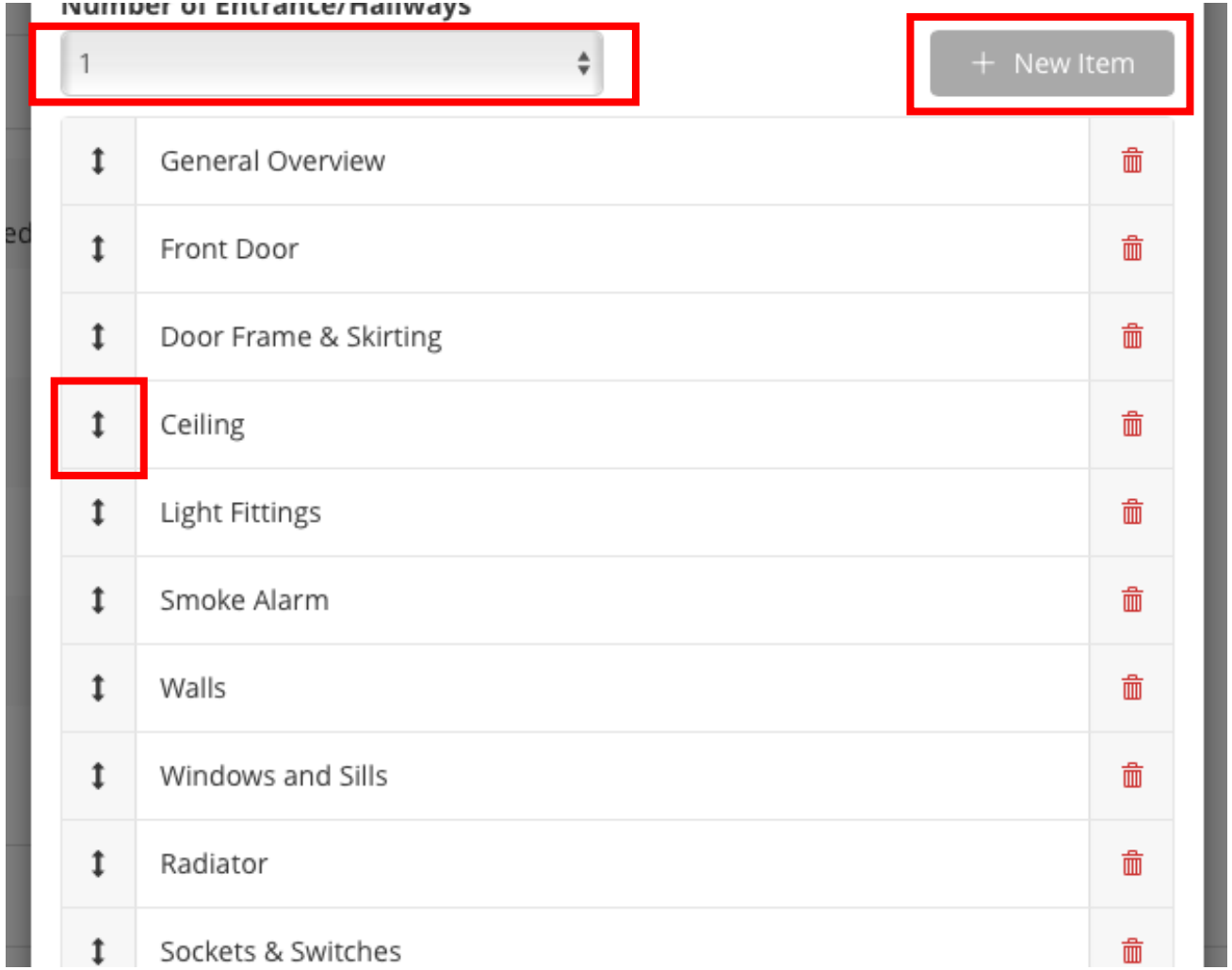
To edit a report and make changes to rooms, layouts and descriptions you'll need to first choose 'Edit Template'.



Editing & Creating…

Adding or clicking on an existing room or space will take you into the specific items for that room (see right).

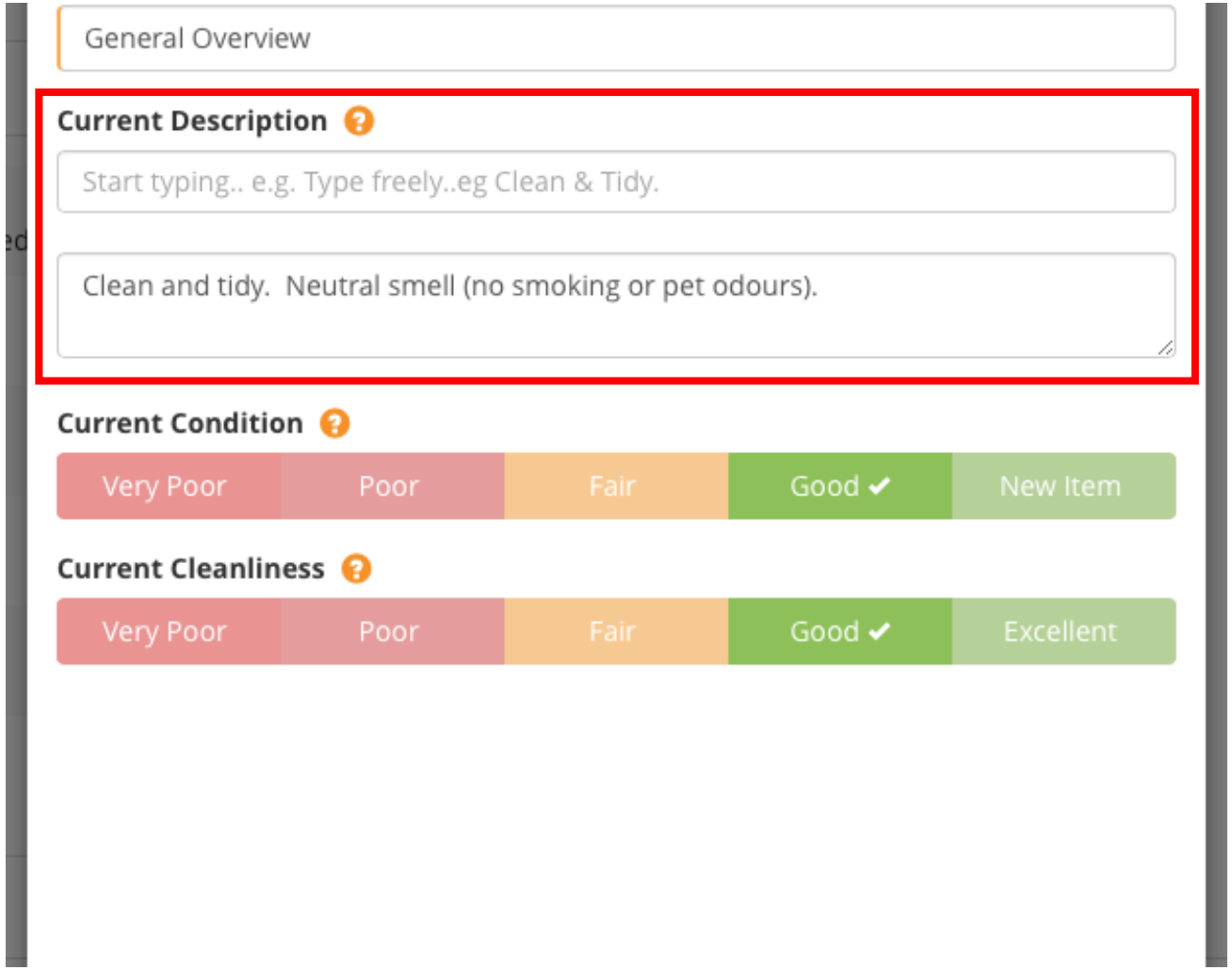
You can then choose the number of those rooms you'd like to be added within the template (top left) re-order using the up/down arrow, or add a new item by choosing '+ New Item' (top right).



Editing & Creating…

Clicking on an item will allow you to view and amend the ‘Current Description’. You can either use our library, or the free type field below.

We’d recommend that you use the free type field for the template text, as this will allow you to quickly add the finer detail using the library when you arrive. There’s no right or wrong way, it’s just our experienced opinion…



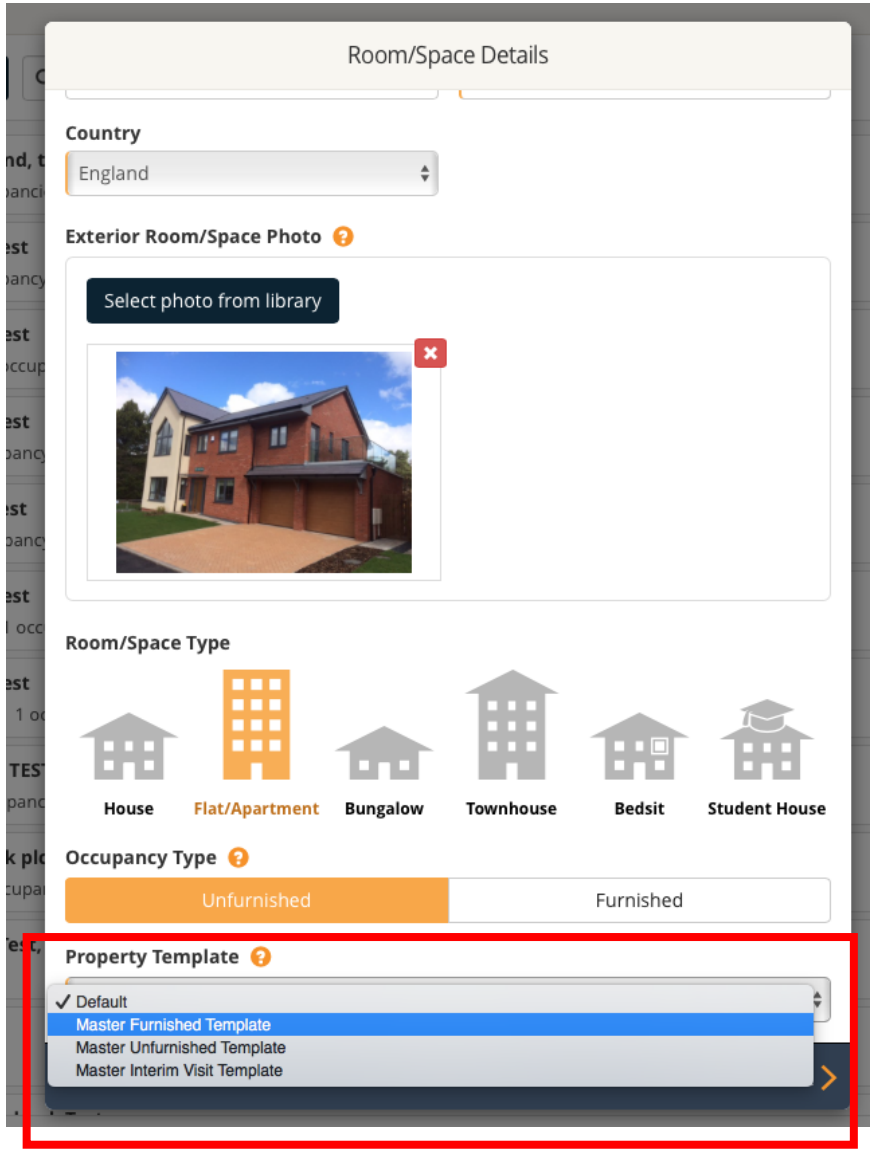
Get started with the App…

It’s easy to choose a template from your library when adding a property.

You can do this via our browser version or iOS/Android (online or offline).

Within the ‘Add Property’ screen you can choose the template you wish to use by selecting from the dropdown menu (see right).

AppStore & Google Play links below…

Available on the App Store

GET IT ON Google Play