Completing an Inspection

This lesson explains how to complete an inspection from the Salesforce Back Office.

Environment:	***Salesforce Back Office***
Persona:	***Inspector***

View Inspections Assigned to You

1. Login to the Salesforce Back Office: https://dsps--uat.cs32.my.salesforce.com/
2. Navigate to the **Inspections** tab
3. Select **My Inspections** from the **View** dropdown and click **Go**
   Note: *Click the Edit link to update the list view to display only Inspections assigned to you*
4. Click the **Number** link to view the Inspection record

Complete an Inspection

1. Login to the Salesforce Back Office: https://dsps--uat.cs32.my.salesforce.com/
2. Navigate to the **Plan Review/PTO** tab
3. Select **Elevators and Conveyances** from the **View** dropdown and click **Go**
   Note*: The applications should be sorted by date of submission*
4. Click the **Permit** link to view the Plan Review record
5. The **Plan Review** record screen displays. Click the **Equipments** quick link
6. The screen scrolls to the **Equipments** section. Click the **Number** link for the Equipment record
7. The **Equipment** record screen displays. Hover over the **Permits** quick link and click the **Permit** number link
8. The **Plan Review** record screen displays. Hover over the **Inspections** quick link and click the **Inspection** number link
   Note: *The Permit is in the Submitted, Pending Inspection* status
9. The **Inspection** record screen displays. Click **Checklist** at the top of the record
   Note: *The* ***Type*** *and* ***Checklist Type*** *fields are automatically populated based on the application type. Update these files, if needed, by clicking* ***Edit***
   Note: *Only the Inspection Owner can complete the checklist. Verify the Inspection Owner in the* ***System Information*** *section of the Inspection record*
   Note: *You can click the* ***Inspection Checklist URL*** *link to view the related checklist document*
10. The **Checklist** screen displays. Complete the checklist questions
11. Click **Save**
12. The **Inspection** record screen displays. Click **Edit**
    a. Select the required inspection status from the **Status** dropdown.
       Note: *When an inspection is passed, the* ***Permit*** *status automatically updates to Active*
       Note: *When an inspection is denied, a Re-Inspection record is automatically created on the initial Inspection record*

   b. Enter the correct date in the **Inspection Completed Date** field
      Note: *Enter all available information*
13. Click **Save**
14. The **Inspection** record screen displays

If the initial Inspection is failed, a Re-Inspection record is automatically created on the initial inspection record.

1. Navigate to the **Inspection** record
2. Hover over the **Re-Inspections** quick link and click the **Number** link
3. The **Inspection** record screen displays. Click **Checklist** at the top of the record
4. The **Checklist** screen displays. Complete the checklist questions
5. Click **Save**
6. The **Inspection** record screen displays. Click **Edit**
   a. Select **Approved** from the **Status** dropdown.
7. Click **Save**
   Note: *Any applicable fees should be manually added. Refer to the* ***Charge an Inspection*** *fee above*