

Set Approved Inspectors Setup

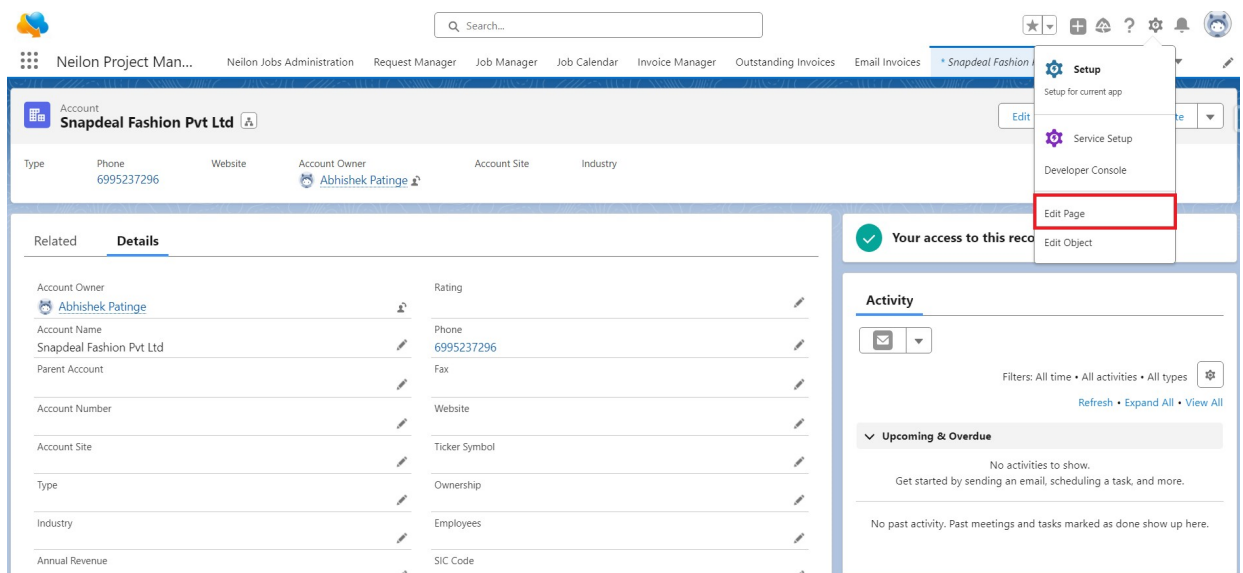
Introduction

We have a feature in which you can set your auditors as approved inspectors or auditors for your customers. All users added as approved inspectors will be allowed as inspectors or auditors for the jobs requested by the customer. If no approved inspectors are configured for the customer, then all your users will be allowed as inspectors or auditors for that customer.

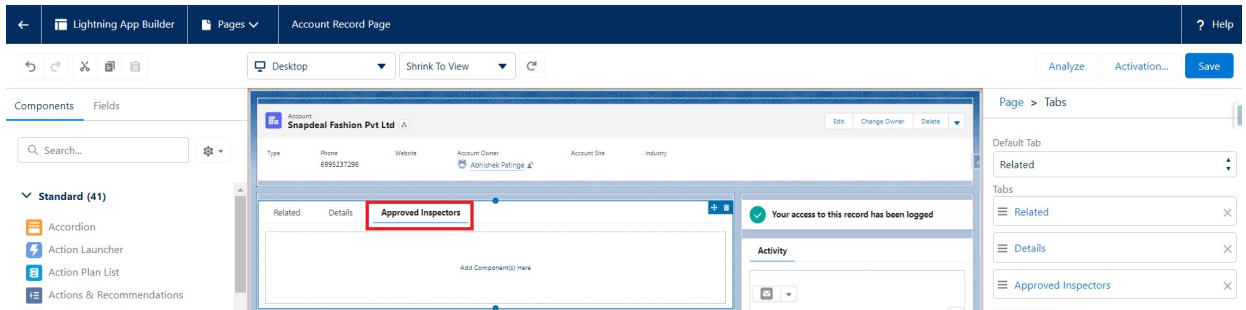
In this guide, we will see how to add approved inspectors for customers.

Prerequisites

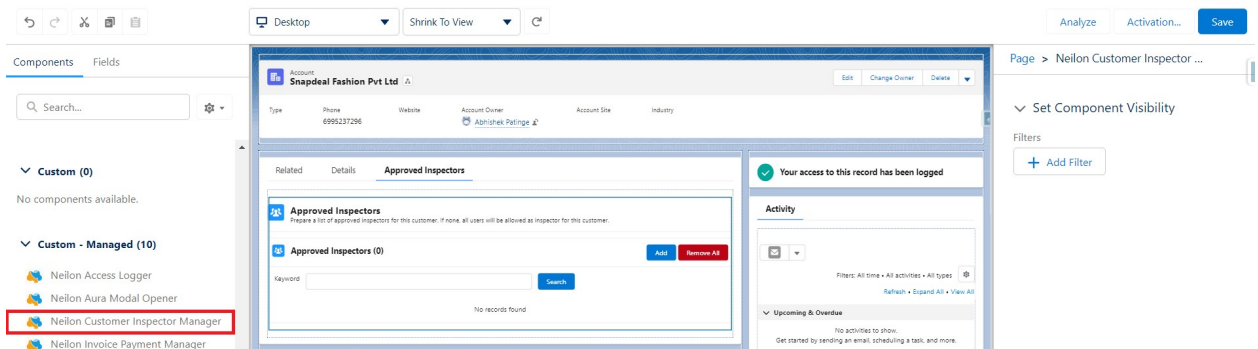
1. Go to the App launcher. Search **Accounts**. Click on it.
2. Open account record details.
3. Go to **Setup**.
4. Click on **Edit Page**.



5. Add a new tab **Approved Inspectors** on the accounts record page.



6. Drag and drop the **Neilon Customer Inspector Manager** component in the **Approved Inspectors** tab.

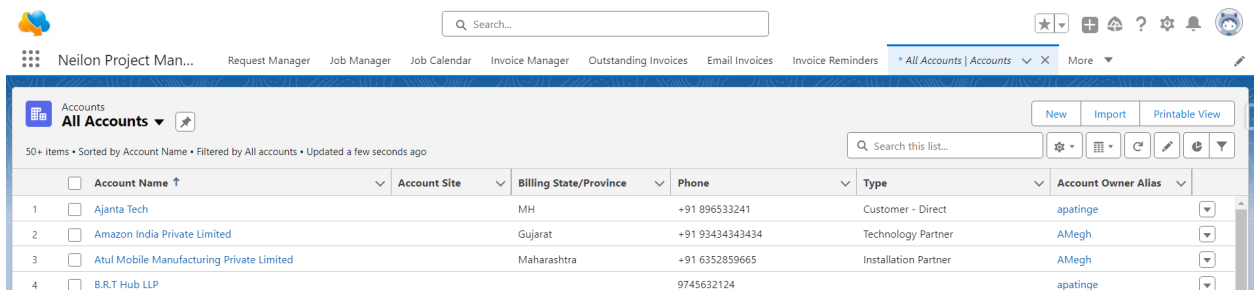


7. Click on the **Save** button.
8. Activate the page if required.

Functionality Overview

Follow the below steps to set approved Inspectors for the customer to perform jobs.

1. Go to the App launcher. Search **Accounts**. Click on it.
2. Find and open the customer account record details for which you want to add as approved inspectors.



3. Go to the **Approved Inspectors** section. It will show the below UI.

- If there are already approved inspectors added, then it will show that in the table. Otherwise, it will show “No records found” message.
- If you don't have permission, then it will show the “You do not have permissions for this. Please contact your System Administrator.” message.

The screenshot shows the 'Approved Inspectors' section for the 'Surya Industries' account. The interface includes a top navigation bar with various modules like 'Neilon Project Man...', 'Neilon Jobs Administration', 'Request Manager', 'Job Manager', 'Job Calendar', 'Invoice Manager', 'Outstanding Invoices', 'Email Invoices', and a user profile dropdown for 'Surya Industries | Account'. Below the navigation bar, the account details for 'Surya Industries' are displayed, including 'Type: Customer - Direct', 'Phone: 9856532312', 'Website', 'Account Owner: Ramakant Bisen', 'Account Site', and 'Industry'. The 'Approved Inspectors' section is active, showing a message: 'Prepare a list of approved inspectors for this customer. If none, all users will be allowed as inspector for this customer.' Below this, there is a search bar with the text 'Approved Inspectors (0)' and a 'Search' button. A message 'No records found' is displayed. On the right side, there is an 'Activity' section with a message 'Your access to this record has been logged' and a list of activities. At the bottom, there is a section for 'Upcoming & Overdue' with a message 'No activities to show. Get started by sending an email, scheduling a task, and more.'

4. Click on the **Add** button. It will show all users of your org.

The screenshot shows the 'Add Inspectors' dialog box. It has a title bar 'Add Inspectors' and a search bar with the text 'Keyword' and a 'Search' button. Below the search bar, there is a table with columns: 'Name', 'Profile', 'Active', and 'Country'. The table contains four rows of user data:

☐	Name	Profile	Active	Country
☐	Anil Meghnathi	System Administrator	✓	USA
☐	Abhishek Patinge	Standard Platform User	✓	India
☐	Suresh Meghnathi	System Administrator	✓	India
☐	Ramakant Bisen	Standard Platform User	✓	USA

At the bottom of the dialog box, there are two buttons: 'Add Inspectors' and 'Cancel'.

5. Select those users whom you want to allow to perform an audit.

6. Click on the **Add Inspectors** button.

Add Inspectors

Keyword Search

✓	Name	Profile	Active	Country
☒	Anil Meghnathi	System Administrator	✓	USA
☒	Abhishek Patinge	Standard Platform User	✓	India
☒	Suresh Meghnathi	System Administrator	✓	India
☒	Ramakant Bisen	Standard Platform User	✓	USA

Add Inspectors
Cancel

7. All selected users are added as **Approved Inspectors** and it will show in the table.

Related
Details
Approved Inspectors

Approved Inspectors
Prepare a list of approved inspectors for this customer. If none, all users will be allowed as inspector for this customer.

Approved Inspectors (4)

Add
Remove All

Keyword Search

Name	Profile	Active	Country	
Anil Meghnathi	System Administrator	✓	USA	▼
Suresh Meghnathi	System Administrator	✓	India	▼
Ramakant Bisen	Standard Platform User	✓	USA	▼
Abhishek Patinge	Standard Platform User	✓	India	▼

8. If you want to remove any user from **Approved Inspectors**, then click on the row level **Delete** action for that user.

Related

Details

Approved Inspectors

 **Approved Inspectors**

Prepare a list of approved inspectors for this customer. If none, all users will be allowed as inspector for this customer.

 **Approved Inspectors (4)**

Add

Remove All

Keyword

Search

Name	Profile	Active	Country	
Anil Meghnathi	System Administrator	✓	USA	▼
Suresh Meghnathi	System Administrator	✓	India	Delete
Ramakant Bisen	Standard Platform User	✓	USA	▼
Abhishek Patinge	Standard Platform User	✓	India	▼

- If you want to remove all users then click on the **Remove All** button.
- You can also search the users. Enter the user name in the search input box and click on the **Search** button or hit the Enter button. It will show the search results in the table.

Related

Details

Approved Inspectors

 **Approved Inspectors**

Prepare a list of approved inspectors for this customer. If none, all users will be allowed as inspector for this customer.

 **Approved Inspectors (4)**

Add

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Keyword

Search

Name	Profile	Active	Country	
Anil Meghnathi	System Administrator	✓	USA	▼
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