

Run the inspection company from the office

A full list of what company admins and office staff can do in the shop today. Included in the \$139 seat. No add-on modules. We do not name other inspection writers here: this is what IntellectSpect actually ships.

Set up the shop

- Setup AI after first sign-in: optional multiple-choice questions that write tax region, types, fees, SOP, agreements, booking, and report language.
- Skip Setup AI and use the checklist if you prefer to click through Setup yourself.
- How-to sheets on Today (How-to tab) and on the phone Office: setup, booking, people, and getting paid.
- Move here on Setup: import the comments and templates you already have, then land without a 30-day rebuild.
- Go-live checklist items jump to the Setup section they describe.
- Company logo, address, notification email, and phones on Setup. Logo shows on staff screens.
- Report language: English, Français, or Español for report chrome. Inspector wording stays as typed.
- Your AI: Fill Report, Analyze, booking-from-notes, and Shop AI use included IntellectSpect AI by default. Paste this shop's OpenAI key on Setup - Your AI to bill OpenAI directly. Disconnect to return to the included AI. Help chat and the 855 line stay on IntellectSpect.

Booking and the public shop

- Five shop pages in the seat: Home, Services, Book, Reviews, Contact at /book/{slug}. No website or SEO fee.
- Inspection types board: order types, set price and contract, and assign qualified inspectors. A packaged type will not leave an unqualified inspector alone.
- Custom size and age fee ranges on booking quotes.
- Coupons and multi-service packages on the book form.
- Shareable booking link and QR from Booking.
- Optional redacted sample jobs on the shop (no client names or addresses, never a live client link).
- Review Engine: after Complete, wait, then ask the client to rate. 4 and 5 stars go to your review URL. 1 to 3 stay private. Off until you turn it on.

People and the calendar

- Add inspectors; they get a welcome email with the sign-in link and the password you set.
- Office staff with delegated shop pages and rights (not a second owner).
- A one-person shop uses the company-admin login. You do not need a second inspector email for the trial.
- Signed-in name and role show in the website header.
- Company calendar: week or month, color per inspector, hide or show people from the legend.
- Inspection list: past, current, future. Cancelled and deleted jobs stay in their own filters. Search address, agent, and client.
- List chips for payment, contract signed, and report finished.

Money

- Shop P&L in this company's currency: collected income minus inspector pay, office share, and mileage.
- A/R aging from the inspection date (unpaid only) and payments by client.

- Inspector pay modes: percent, fixed dollars, or hybrid. You pick on Setup. There is no silent 100% to the lead.
- Team jobs: save the split on Finance. Optional office share for a company admin not on that job.
- Mileage rate on Payments (dollars per mile). 0 turns mileage pay off. Inspectors enter miles on the job. Finance and the inspector-pay CSV include Miles and Mileage pay. Mileage is payroll, not a client fee.
- Escrow on Client release is a payment state (none, held, released, refunded), not a bank escrow account. Held is paid but not income. Refunded is not income and not A/R.
- Client money goes to the company: Interac e-Transfer, card on the shop's own Stripe, Apple Pay and Google Pay when the device supports them, Affirm when Stripe has it on, USD ACH, Canadian bank debit (PAD), and Pay at close.
- IntellectSpect bills the \$139 seat separately. No technology fee on the job payment.
- Live anniversary invoices. Unpaid banner with time left. Two-day grace, then the shop suspends until you pay.
- Print client invoices and receipts. Add GST or EIN on invoices.
- Opt-in regional averages (fee, turnaround, reviews) when enough shops in that province or state opt in. CAD and USD stay split. We do not show another shop's books.

Clients, agents, and texts

- CRM: contacts, pipeline from lead to won or lost, and follow-up tasks on Today and on that inspector's phone list.
- Email campaigns from the shop from-email, CSV import, and optional Mailchimp audience sync.
- Two-way SMS inbox on the shop Twilio number. Inspectors can text that job from the report. STOP opts the number out.
- The 855 line answers with AI and forwards to this shop's office during hours when the caller is already a client.
- Realtor inspection portal at /agent: upcoming jobs and released reports, lasting sign-in after the email link.
- Book again does not prefill the other agent.
- Email the address already on the job for a two-hour client sign-in link.
- Recommended contractors: shop list (name, phone, zip, optional trade). Inspectors attach them on a finding. Not a marketplace, and IntellectSpect does not take a cut.

Chat, AI, contracts, and forms

- Admin AI (Shop AI on the phone): list inspectors and types, summarize this shop's finance, check Stripe or QuickBooks, create or deactivate an inspector, reset a password. Writes preview first.
- Chat with IntellectSpect: live human thread from every signed-in website page and the phone. Not Help AI.
- On a multi-inspector shop, inspectors also have Chat with office on that job. Solo shops do not show office chat.
- Upload your agreements or start from platform templates. The shop is responsible for every contract and report it uses.
- Official fillable PDFs: WETT plus shop-uploaded originals (for example 4-point, wind mit, WDI). Inspectors fill them on Conditions.
- Third-party PDFs (radon, sewer, termite) attach on the job and list separately from our findings.

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