



Quick Start Guide

Setting up your first inspection, start to finish.

Thank you for taking the free trial.

CodeGreen ITM was built out of real fieldwork rather than from a whiteboard. Every screen in this guide exists because we needed it on a job, and the time it saves compounds as you go. An AHJ entered once is there on every property afterwards. A panel configured once is waiting for you next year. What feels like setup today is work you never repeat.

Work through the steps below and you will see it for yourself. If anything does not make sense, ask us. We are always here to help.

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CodeGreen ITM · admin@codegreenitm.com

Start in the office, not on the phone.

The mobile app only shows what the office has set up: properties, fire alarm systems, devices and scheduled inspections. If your technicians open the app before steps 1 to 7 are done, there is nothing there for them to inspect. Do the setup below on a computer first, in this order. Each step feeds the next.

1. Your company information, logo and services

Go to **Settings > General**. Everything at the top of this page prints on every report you send, so get it right before your first inspection.

1. Enter your **Company name, address, Phone, Email** and **Website**.
2. Enter your **License / Registration** number. It prints under your company address on reports.
3. Under **Company Logo**, click **Click to upload logo** and choose your logo (PNG, JPG or SVG, up to 2 MB). It appears at the top of every report.

Company name
Fire & Safety Co

Address Line 1
125 Asylum Street

Address Line 2
Suite, Floor, etc.

City State ZIP Phone
Hartford CT 06103 555-010-0100

Email Website
office@example.com fireandsafetyco.com
Optional — prints in the report header

License / Registration
CT Fire Alarm Contractor Lic. FAC.0001234
Optional — prints under the company address on reports

Company Logo

Change Logo [Remove](#)
Company info reflects on all future reports.

Settings > General: company information and logo.

Then scroll all the way to the bottom of the same page, to **Services**:

4. **Tick** every inspection service your company offers. Fire Alarm is always on.
5. **Untick** every service you do not offer. It can no longer be added to a property, and its settings pages and its qualification checkbox disappear, so nobody has to work around services you never perform.
6. Click **Save**.

Services

Which inspections this company does. Switching one off stops it being added to properties and hides its settings and qualification. Properties that already have it keep it, and anything scheduled carries on. Nothing is deleted. Fire Alarm is always on.

- ☒ Emergency Lighting
- ☒ Fire Extinguishers
- ☒ Call For Aid
- ☒ Kitchen Hoods
Covers both Hood Suppression and Hood Exhaust Cleaning.
- ☒ Fire Doors
- ☒ Water-Based Systems
Sprinkler, standpipe, private mains, fire pump, tank, spray, foam-water and mist (NFPA 25).

Settings > General, bottom of the page: tick what you offer.

Unticking a service deletes nothing, and you can tick it again at any time.

2. Add your people and set their qualifications

Go to **Settings > Users & Roles**.

- 1. Click **Invite new user**, enter their name and email, pick a role and click **Send invite**. **Inspector** and **Advanced Inspector** work in the mobile app; **Admin** and **Manager** also use the office. Each person gets an email to set their password.
- 2. In the **Qualifications** column, click each person and tick **only the services that person is certified to do**. Include yourself if you inspect.

Users & Roles

10 seats used

Q Search users...

Full name	Role	Qualifications	Status
Aisha Grant	Advanced Inspector	View (4)	Pending
Chris Novak	Advanced Inspector	View (12)	Pending
Dana Keller	Manager	None - set	Active
Jen Morales	Inspector	View (4)	Pending
Kevin Doyle	Inspector	View (3)	Pending
Luis Ortega	Advanced Inspector	View (10)	Active
Mike Russo	You Admin	View (7)	Active
Ryan Caldwell	Inspector	View (3)	Pending
Sarah Whitman	Inspector	View (4)	Active
Tom Brennan	Advanced Inspector	View (5)	Pending

Settings > Users & Roles: the Qualifications column.

Qualifications — Kevin Doyle

The services this person is qualified to perform. Only qualified technicians are offered when a property or a visit picks a technician, and the dispatch board refuses a drop onto anyone else.

✓ Field technician

Office only

Has a row on the dispatch board and is offered as a technician. A solo owner-operator is both admin and field technician.

☐ Fire Alarm

☐ Emergency Lighting

☒ Fire Extinguisher

☐ Call For Aid

☒ Hood Suppression

☒ Hood Exhaust Cleaning

☐ Fire Door

☐ Fire Sprinkler

☐ Standpipe & Hose

☐ Private Fire Mains

☐ Fire Pump

☐ Water Storage Tank

☐ Water Spray

☐ Foam-Water

☐ Water Mist

Cancel

Save

A technician qualified for fire extinguishers and hoods, but not fire alarms.

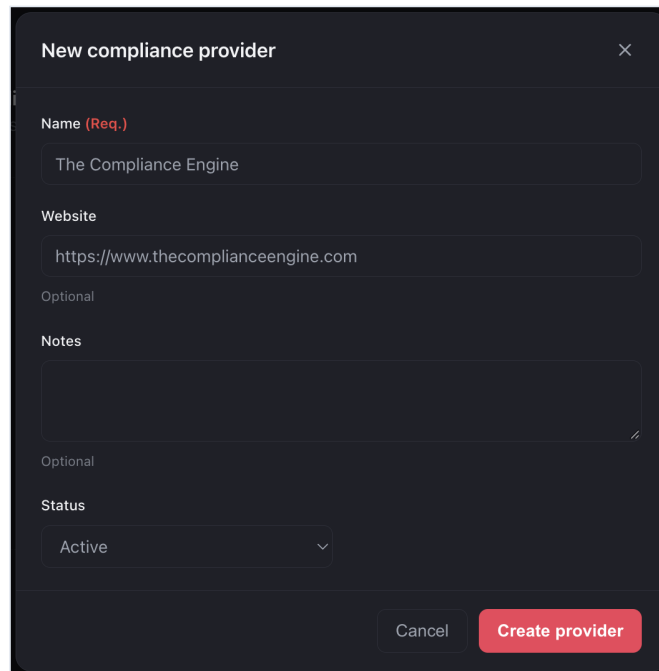
Why qualifications matter. A technician certified to service fire extinguishers is not necessarily certified to inspect fire alarms. Qualifications are how the system knows the difference. When you schedule a fire alarm inspection, only people qualified for Fire Alarm are offered, and on the phone a technician can only book services they are qualified for. Nobody is accidentally given an inspection they are not certified to perform.

During your free trial you can add up to 5 users in total. A paid plan from **Settings > Billing** has no user limit.

3. Add your third-party compliance provider (only if you use one)

Some jurisdictions require inspection reports to be filed through a service such as **The Compliance Engine**. If any of yours do, add that provider now, because the AHJ in the next step has to point at it.

1. Go to **Settings > Third-Party Compliance** and click **Add provider**.
2. Enter the provider's **Name** (and **Website** if you like), then click **Create provider**.

A screenshot of a web form titled "New compliance provider" with a close button (X) in the top right corner. The form contains several input fields: "Name (Req.)" with the text "The Compliance Engine" entered; "Website" with the URL "https://www.thecomplianceengine.com" entered; "Notes" which is an empty text area; and "Status" which is a dropdown menu currently showing "Active". Below the "Notes" field, the word "Optional" is displayed. At the bottom right of the form are two buttons: "Cancel" and "Create provider".

Settings > Third-Party Compliance > Add provider.

No third-party filing in your area? Skip this step.

4. Add your AHJ

The Authority Having Jurisdiction is the fire department or fire marshal's office for the area. Go to **Settings > AHJs** and click **Add New AHJ**.

1. Enter the **Name**, the **Jurisdiction / City**, the **State** and its **ZIP codes** (type a ZIP and press Enter to add each one).

2. Enter the **Dispatch phone number** (the line a technician calls to put a system on test) and the **Fire Marshal Office Number**.
3. If you added a compliance provider in step 3 and this jurisdiction requires it: tick **Compliance report required**, choose the **Provider**, then tick each service the AHJ requires filed and enter the **per-submittal fee** the provider charges for it.
4. Click **Create AHJ**.

The 'New AHJ' form is a dark-themed modal window. It contains the following fields and sections:

- Name (Req.)**: A text input field containing 'Hartford Fire Department'.
- Jurisdiction / City (Req.)**: A text input field containing 'Hartford'.
- State (Req.)**: A dropdown menu showing 'CT — Connecticut'.
- Zip codes**: A section with two input fields containing '06103' and '06105', each with a close button (x). To the right is a link 'Add another...'. Below this is a hint: 'Type a zip and press Enter to add multiple.'
- Dispatch phone number (Req.)**: A text input field containing '860-555-0142'.
- Fire Marshal Office Number (Req.)**: A text input field containing '860-555-0177'.
- Below the phone number fields is a note: 'The separate dispatch/communications line. Shown on fire alarm reports.'

Add New AHJ: name, city, state, ZIP codes and phone numbers.

The 'Third-party compliance' section of the form includes:

- Third-party compliance**: A section header.
- Compliance report required**: A checked checkbox.
- Tick when this AHJ requires the inspection report filed with a third-party provider.**: A hint text.
- Provider (Req.)**: A dropdown menu showing 'The Compliance Engine'.
- Services requiring compliance**: A section header.
- Tick each service this AHJ requires filed, and enter its per-submittal fee.**: A hint text.
- Services list**: A list of services with checkboxes and fee inputs:
 - ☒ **Fire Alarm**: A checked checkbox. To its right is a fee input field containing '25' with a dollar sign (\$) and the text 'per submittal'.
 - ☐ **Emergency Lighting**: An unchecked checkbox.
 - ☐ **Fire Extinguisher**: An unchecked checkbox.

The compliance section of the same form: provider, service and fee.

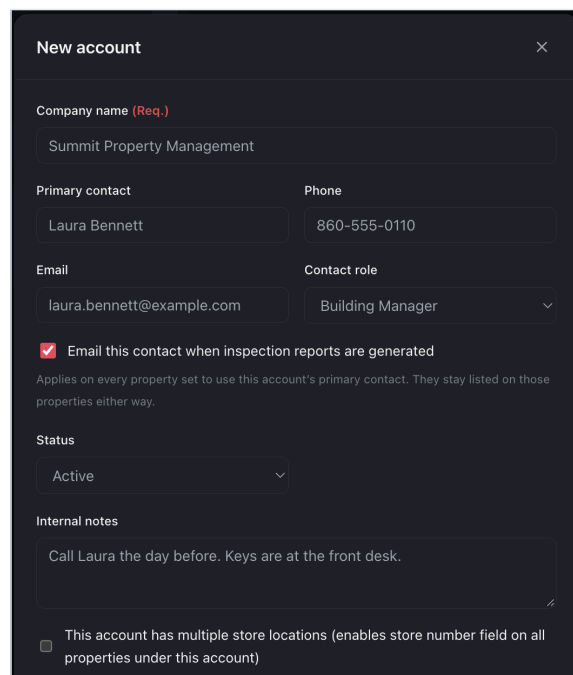
Be exact with the city, state and ZIP codes. When you add a property, CodeGreen offers the right AHJ automatically by matching the property's address: the state first, then the ZIP code and city. A misspelled city or a missing ZIP code means the AHJ is not offered for that property.

Compliance fees are entered once, here. They flow onto every property under this AHJ, and if the provider changes a fee, updating it here updates every property.

5. Create the customer account

An account is your customer: the company or owner you do the work for. Every property belongs to an account. Open **Accounts** in the sidebar and click **New account**.

1. **Company name** (required): the customer as it should appear on reports.
2. **Primary contact, Phone, Email and Contact role:** your main person at the customer. Leave **Email this contact when inspection reports are generated** ticked if they should receive every report.
3. **This account has multiple store locations:** tick it for a chain. Every property under the account then gets a store number.
4. **Internal notes:** anything the office should know. Customers never see it.
5. Click **Create account**.



The screenshot shows a 'New account' form with the following fields and options:

- Company name (Req.):** Summit Property Management
- Primary contact:** Laura Bennett
- Phone:** 860-555-0110
- Email:** laura.bennett@example.com
- Contact role:** Building Manager (dropdown menu)
- ☒ **Email this contact when inspection reports are generated**
Applies on every property set to use this account's primary contact. They stay listed on those properties either way.
- Status:** Active (dropdown menu)
- Internal notes:** Call Laura the day before. Keys are at the front desk.
- ☐ **This account has multiple store locations** (enables store number field on all properties under this account)

Accounts > New account.

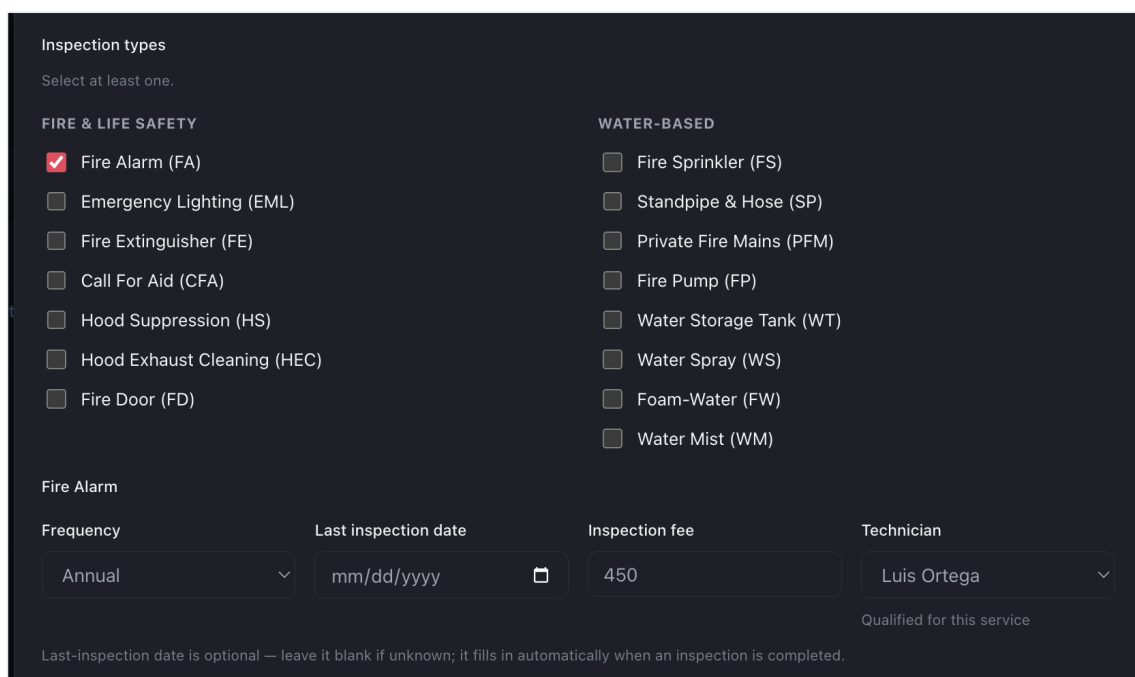
One billing contact for twelve buildings? Add them once under **Contacts** on the account page. They appear on every property under that account, instead of being typed twelve times.

6. Add the property

This is the building you will inspect. Open **Properties** and click **New property**.

1. Enter the **property name** and **address**, and choose the **account** from step 5.
2. Choose the **AHJ**. The one you added in step 4 is offered because it matches the address. It is required.
3. Under **Inspection types**, tick **Fire Alarm**, then set its **Frequency**, **Inspection fee** and **Technician**. Only people qualified for Fire Alarm are offered.
4. Tick **This property has multiple floors** if it does. Every device then asks for a floor, and the reports show it.

New property: the AHJ is offered because it matches the city and ZIP.



Inspection types

Select at least one.

FIRE & LIFE SAFETY

- ☒ Fire Alarm (FA)
- ☐ Emergency Lighting (EML)
- ☐ Fire Extinguisher (FE)
- ☐ Call For Aid (CFA)
- ☐ Hood Suppression (HS)
- ☐ Hood Exhaust Cleaning (HEC)
- ☐ Fire Door (FD)

WATER-BASED

- ☐ Fire Sprinkler (FS)
- ☐ Standpipe & Hose (SP)
- ☐ Private Fire Mains (PFM)
- ☐ Fire Pump (FP)
- ☐ Water Storage Tank (WT)
- ☐ Water Spray (WS)
- ☐ Foam-Water (FW)
- ☐ Water Mist (WM)

Fire Alarm

Frequency: Annual (dropdown)

Last inspection date: mm/dd/yyyy (calendar icon)

Inspection fee: 450

Technician: Luis Ortega (dropdown)

Qualified for this service

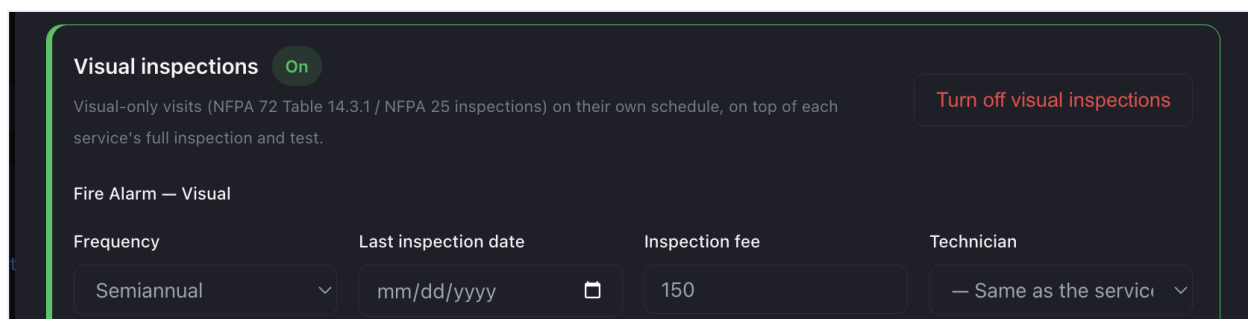
Last-inspection date is optional — leave it blank if unknown; it fills in automatically when an inspection is completed.

Tick Fire Alarm, then set its frequency, fee and technician.

Visual inspections (if you perform them)

Some customers pay for visual inspections between the annual inspection and test: the look-don't-test visits in NFPA 72 Table 14.3.1. If you do these at this property, click **Add visual inspections** on the same form and set:

- Frequency:** how often the visual visit happens.
- Inspection fee:** what you charge for each visual visit. It is kept for your reference.
- Technician:** who normally does it. Leave **Same as the service** to use the Fire Alarm technician.



Visual inspections On

Visual-only visits (NFPA 72 Table 14.3.1 / NFPA 25 inspections) on their own schedule, on top of each service's full inspection and test.

[Turn off visual inspections](#)

Fire Alarm — Visual

Frequency: Semiannual (dropdown)

Last inspection date: mm/dd/yyyy (calendar icon)

Inspection fee: 150

Technician: — Same as the service (dropdown)

Add visual inspections: frequency, fee and technician.

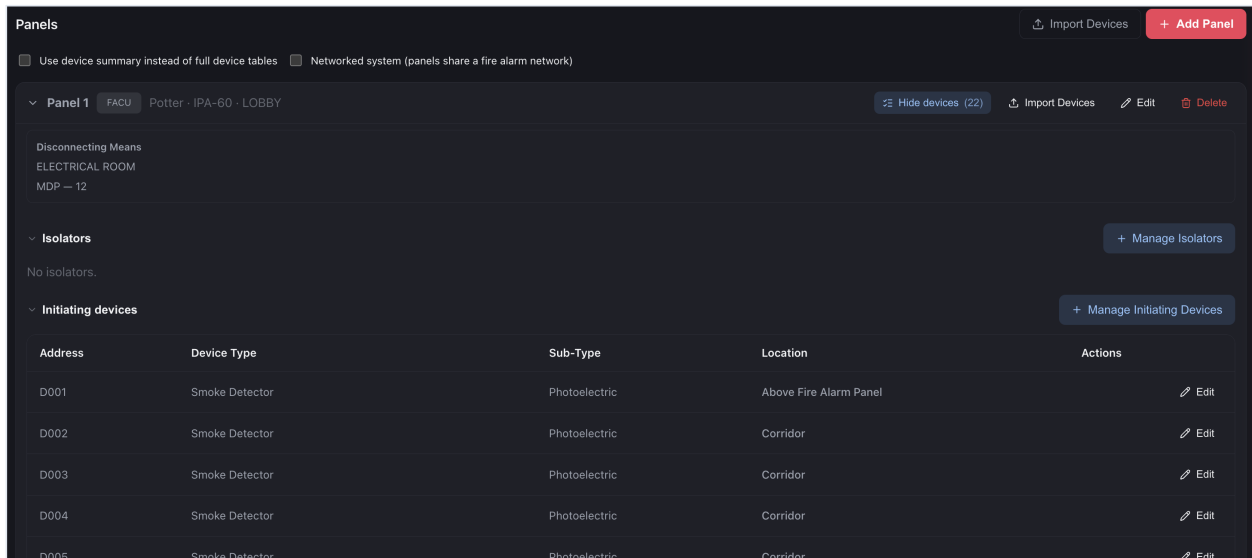
Click **Create property**.

7. Build the fire alarm system: panel and devices

If the system is monitored, add its monitoring company first: **Settings > Fire Alarm > Central Stations > Add central station**, with its name and phone number. The technician calls that number from the app to put the system on test.

Then open the property, go to its **Fire Alarm** tab and click **Configure Fire Alarm System**.

1. Choose the **system type**. **Protected Premises (Local Only)** reports to nobody, so no monitoring questions are asked. Every other type is monitored: choose the central station and the means of transmission.
2. Choose the **NFPA 72 edition** the system is inspected to, answer the **System Control Functions** (HVAC shutdown, elevator recall, door release and so on) and click **Save system**.
3. Under **Panels**, click **Add Panel**: enter the **Panel number** and **Location description**, pick the **Manufacturer** and **Model number**, and fill in the circuits. Click **Add panel**.



Fire Alarm tab: a panel with its devices, and the Import Devices and Add Panel buttons.

Add the devices with Import Devices

You do not have to type a device list. On the panel, click **Import Devices** and upload what you already have:

1. A **panel point report** or device list exported from the panel software.
2. A **spreadsheet** (.xlsx or .csv) or a **PDF**.
3. A **photo** of a printed device schedule.

CodeGreen reads the file and lays out every device it found: type, address and location. **Nothing is saved until you review it.** Check each row, fix anything it read wrong or skip what you do not want, then confirm you have checked the list against the panel's actual programming and import. Devices already on the panel are shown separately, so nothing is added twice.

Import Devices

Cancel

Upload a panel point report or device list and let the assistant propose devices to add — you review and approve everything before anything is saved. Start by picking the property and panel you're populating.

1. Property

2. Panel

3. Upload

Importing into: Riverside Hotel — Panel 1

Change panel

Click to upload or drag a point report here

.xlsx, .csv, .pdf — or a photo (.jpg/.png) of a printed device schedule or panel label

Import Devices: upload the file for the panel.

Review initiating devices — Step 1 of 2

Undo

Skip initiating devices

Click a cell, then drag the red square at its corner down to fill that one column · Select rows with the left grip, then right-click for Copy, Paste, Duplicate, and Fill Down (that one copies every column) · Tab / Enter move between cells · Ctrl/Cmd+Z undoes the last fill, paste, or duplicate · paste tab-separated values to fill multiple cells.

Device Type (Req.)	Sub-Type (Req.)	Location (Req.)	Address (Req.)	Zone	Loop (Req.) 0 = Built-in Internal SLC - N/A if not a loop	Floor (Req.)	Notes	
☰ Smoke Detector	▼ Photoelectric ▼	▼ Lobby North ▼	001		1			×
☰ Smoke Detector	▼ Photoelectric ▼	▼ Lobby South ▼	002		1			×
☰ Smoke Detector	▼ Photoelectric ▼	▼ 2nd Floor Corridor East ▼	003		1			×
☰ Smoke Detector	▼ Photoelectric ▼	▼ 2nd Floor Corridor Wes ▼	004		1			×
☰ Heat Detector	▼ Fixed Temperature ▼	▼ Kitchen ▼	005		1		135F rated	×
☰ Duct Smoke Detector	▼ Supply Air ▼	▼ AHU-1 Supply ▼	006		1			×
☰ Manual Fire Alarm Box	▼ — Sub-type — ▼	▼ Main Entrance ▼	001		1			×
☰ Manual Fire Alarm Box	▼ — Sub-type — ▼	▼ Rear Exit ▼	002		1			×
☰ Waterflow Switch	▼ — Sub-type — ▼	▼ Riser Room ▼	003		1			×
☰ Tamper Switch	▼ OS&Y ▼	▼ Riser Room OS&Y Valve ▼	004		1			×

+ Add Row

+ Add 10 Rows

Duplicate address numbers are allowed on a separate loop, or up to 2 on the same loop for a dual monitor module.

Cancel

Continue

The review grid: every device read from the file, ready to check and fix.

Import Devices is available to **Admins** and **Managers**. No file for this system? Add devices by hand with **Manage devices** on the panel, or let an Admin or Advanced Inspector build the list on site with **Manage Fire Alarm System** in the mobile app.

8. You are ready to inspect

The devices are in the system, so the property is ready for its first inspection. This is the point where the mobile app has something to work on.

- Schedule it:** from the property's **Inspections** tab (**Schedule inspection**), from **Inspections > New Inspection**, or by dragging it onto a technician's day on **Dispatch**.
- Inspect it:** the technician opens the job from **Today's Jobs** in the app and works through it. The app works with no signal and syncs when it reconnects. Anything that fails becomes a deficiency on the spot. They tap **Review & Submit** and sign.
- Review and send it:** in the office the visit shows **Needs Review**. Click **Review**, then **Mark as Reviewed**, choose **Generate report**, and click **Send Report**.

Get the mobile app

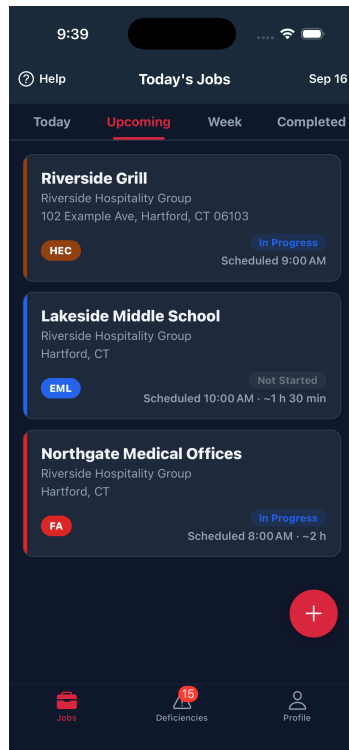
Your technicians scan the code for their phone with its camera, install **CodeGreen ITM**, and sign in with the email and password from their invite.



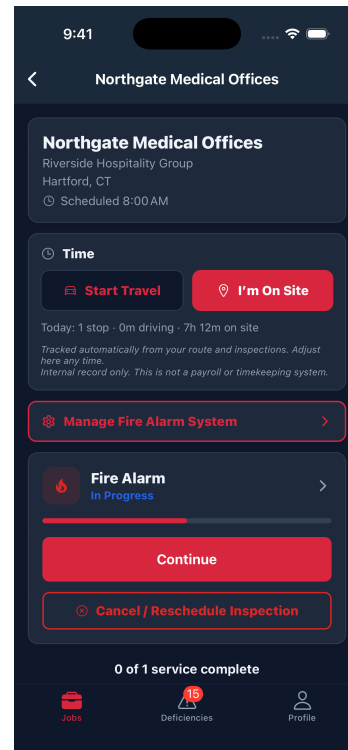
iPhone
apps.apple.com



Android
play.google.com



Today's Jobs in the app, with the Upcoming tab open.



A job: Manage Fire Alarm System, then Continue into the inspection.

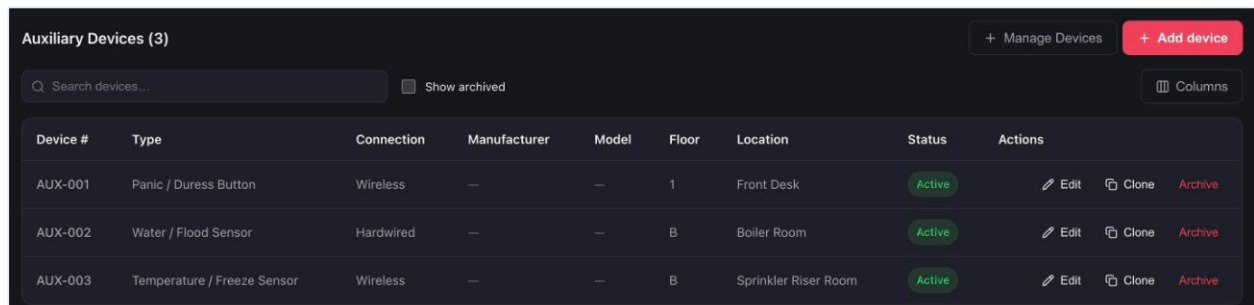
9. Auxiliary Systems: panic buttons, flood and temperature sensors

Many of the buildings you already inspect have devices that are wired to the alarm or to their own receiver but are not fire devices: a panic button under a counter, a water sensor in a boiler room, a freeze sensor in a walk-in cooler. Auxiliary Systems inspects those, and it works the same way as everything above.

There is no NFPA standard for these devices, so the report certifies the work was performed in accordance with the manufacturer's instructions rather than citing a code.

Switch it on and add the devices

1. It is on already. **Settings > General > Services** shows **Auxiliary Systems** ticked. Untick it if your company does not do this work.
2. On the property, tick **Auxiliary Systems** under **Inspection types** and set its **Frequency**, **Inspection fee** and **Technician**, exactly as you did for Fire Alarm in step 6. An **Auxiliary Systems** tab appears on the property.
3. On that tab, click **Add device** for one device, or **Manage Devices** to enter a whole building at once in a grid.
4. Each device needs its **Type**, its **Location**, and its **Floor** if the property has multiple floors. **Connection**, **Manufacturer**, **Model** and notes are optional.



								+ Manage Devices	+ Add device
Q Search devices...								☐ Show archived	Columns
Device #	Type	Connection	Manufacturer	Model	Floor	Location	Status	Actions	
AUX-001	Panic / Duress Button	Wireless	—	—	1	Front Desk	Active	Edit	Clone Archive
AUX-002	Water / Flood Sensor	Hardwired	—	—	B	Boiler Room	Active	Edit	Clone Archive
AUX-003	Temperature / Freeze Sensor	Wireless	—	—	B	Sprinkler Riser Room	Active	Edit	Clone Archive

The property's Auxiliary Systems tab, with the devices added.

Manage auxiliary devices

Undo

X

Click a cell, then drag the red square at its corner down to fill that one column · Select rows with the left grip, then right-click for Copy, Paste, Duplicate, and Fill Down (that one copies every column) · Tab / Enter move between cells · Ctrl/Cmd+Z undoes the last fill, paste, or duplicate · paste tab-separated values to fill multiple cells.

Device #	Type (Req.)	Location (Req.)	Floor (Req.)	Connection	Manufacturer	Model #	Notes
AUX-001	Panic / Duress Button	Front Desk	1	Wireless	— Select —		Under the counter, left
AUX-002	Water / Flood Sensor	Boiler Room	B	Hardwired	— Select —		
AUX-003	Temperature / Freeze Sensor	Sprinkler Riser Room	B	Wireless	— Select —		
AUX-004	— Select —	e.g. Front Desk		— Select —	— Select —		
AUX-005	— Select —	e.g. Front Desk		— Select —	— Select —		
AUX-006	— Select —	e.g. Front Desk		— Select —	— Select —		
AUX-007	— Select —	e.g. Front Desk		— Select —	— Select —		
AUX-008	— Select —	e.g. Front Desk		— Select —	— Select —		

+ Add Row

+ Add 10 Rows

Cancel

Save All

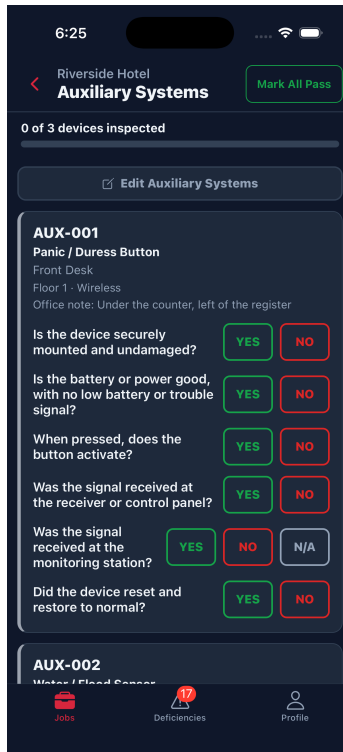
Manage Devices: a whole building in one grid.

Device numbers fill in for you, carrying on from the last one, so a building entered over several visits stays in order.

What your technician is asked

Six checks per device, and **the device type decides the third one**, so nobody is ever asked whether a flood sensor was pressed:

1. Is the device securely mounted and undamaged?
2. Is the battery or power good, with no low battery or trouble signal?
3. The activation check: **when pressed** for a panic button, **when water is applied** for a flood sensor, or the **temperature test** for a freeze sensor.
4. Was the signal received at the receiver or control panel?
5. Was the signal received at the monitoring station? This is the only check that takes **N/A**, for a device nobody monitors.
6. Did the device reset and restore to normal?



A device on the phone, with the checks for its type.

Anything answered **NO** opens a deficiency on the spot, with photos, the same as fire alarm work. The technician taps **Review & Submit** and signs, the office sees **Needs Review**, and **Mark as Reviewed** then **Generate report** produces the Auxiliary report: the device list, every check per device, and the deficiencies with their photos.

One visit, one PDF. If a technician does auxiliary and fire alarm at the same building on the same day, the office can send both as a single combined report.

Where to get help. The full **Guide** is built into the app. It is the last item in the sidebar, it is searchable, and it covers every screen in far more detail than this page, including sending several reports as one file and deficiency-only reports. Start here, then go there when you need the specifics.

Still stuck, or think something should work differently? Email us at admin@codegreenitm.com. A real person reads it.

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