Surveys and Surveyors

A survey is a property status report for all fixtures in a particular trade.

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What is a Survey?

A survey is a property status report for all fixtures in a particular trade. Surveys are created by admin users. Surveyors receive email notification that a new survey is ready for them to complete. Surveyors complete Surveys via the Surveyor Portal.

TO CREATE A SURVEY

- Go to the Property/Trade that you want to have surveyed.
- Find the +Survey button with +Contract and +WOs top right under the trade tabs.
- Choose a due date, surveyor and add any optional special instructions.
- The survey will be issued and an email sent to the Surveyor.

surveyplus.png

Image not found or type unknown
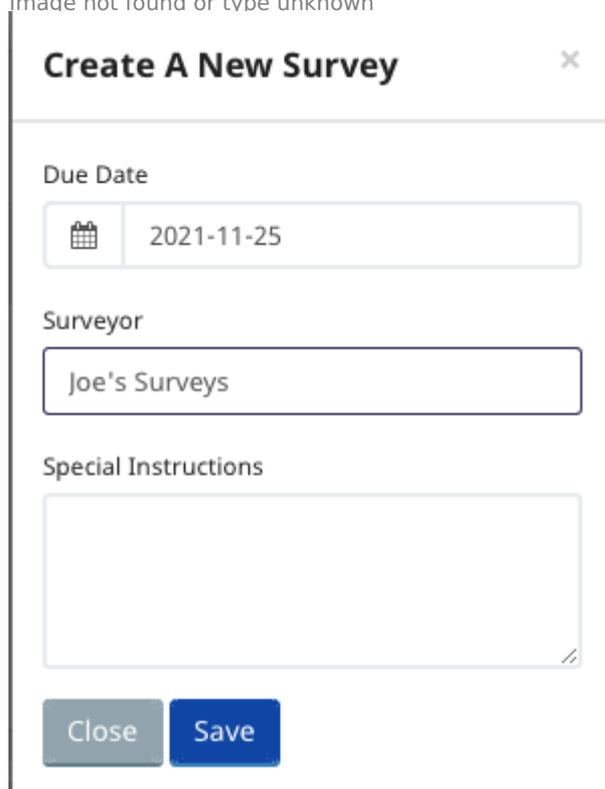
Create A New Survey   ✕

Due Date

📅 | 2021-11-25

Surveyor

Joe's Surveys

Special Instructions

[Close] [Save]

Who is a Surveyor?

A Surveyor is an individual with permission to use the survey portal. Any Surveyor can be issued a Survey by an Admin user. With an issued Survey, Surveyors have access to any active property/trade in your account.

To Create a Surveyor

- Go to Surveyors
- Open the "Create A New Surveyor" section.
- Fill out every field in the form unless labeled optional
- The login password must be unique to the Sytewise system for all surveyors and vendors. If you enter a username that is already taken you will be asked to enter another.
- Make sure to write down the password you enter. Passwords are not retrievable but they are resettable.

Create A New Surveyor

Company Name

[Company Name]

Login Username

[Unique Username]

Phone Number

[Phone including areacode]

Password

[Password]

Company Email

[email address]

Physical Address (Optional)

Surveyor Special Permissions

Select Surveyors are given "Create" permission

- Create Permission grants that surveyor the ability to add a survey from the Survey Portal.
- A surveyor can create a survey for any property and trade in the account as long as there is at least one survey for that trade.

A surveyor can create a survey in the survey portal by searching for a property, selecting a trade and completing the form.

Select Surveyors are given "Edit" permission

- Edit permission grants that surveyor the ability to make changes to any of the fixtures or parts in the Property/Trade of an open survey.
- For fixtures
  - They can change the name or description.
  - They can also flag any fixture "This fixture DOES NOT EXIST!"
  - This does not delete the fixture but does add a pinned note to the fixture. "This fixture DOES NOT EXIST" attributed to the Surveyor.

With "Edit" permission a surveyor can impose direct edits on the information in a fixture or part.

Completing A Survey

A surveyor logs into the Survey Portal with the username and password the Admin created for them. The home page once logged in will show a list of incomplete Surveys. Click "Completed" shows a list of all completed surveys by date.

Clicking a completed survey will show the special instructions and when it was completed.

Incomplete Surveys show a map and a list of all fixtures in that trade. If fixtures are in groups the same groupings are available here too. The "Nearby" button lists all fixtures closest to the device with the nearest at the top.

This only works if the fixtures are on a GPS map, not a floorpan map. It will also not work if you don't allow location service in your browser.

Expanding any fixture with the + button will reveal parts in that fixture.

It is here that the Surveyor indicates any outages by clicking the green slide switch to red. Enter an optional note. Optionally add up to 10 images.

Do this for any fixture with outages. Your entries are saved but not committed to the master database until the survey is finished. Quitting the browser or leaving the survey for more than half an hour will loose all entries and they will have to start again. If the Surveyor has Edit permission they can edit fixture or part details in the Survey.

Surveyor Created Surveys

For a Surveyor to create a Survey they must have permission granted by an admin to create surveys.

If the surveyor has permission to create surveys here is how to create them.

- Log into the survey portal
- From the home page click "Create A New Survey"
- From any page click the "crosshairs" icon in the footer nav.
- In the property text search box enter any part of the property title or address, as long as you enter at least 3 characters.
- Choose a property from the list of found properties.=
- Only trades with fixtures will appear below the properties.
- Choose a trade.
- Choose a due date
- Enter any special instructions
- Choose to have an email sent to yourself (the surveyor)
- An email informing of the new survey will be sent to
- Any admin who has favorited the property.
- If none, all super admins will receive an email.