Creating Your First Survey

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Surveys are how Sytewise puts a trained set of eyes on a property before any decisions get made. Instead of scoping work from the office and hoping for the best, you send a surveyor to document what is actually out there, and the results become the factual basis for whatever comes next. A surveyor walks the fixtures, notes what they find, uploads photos, and submits a report. You review it and decide what warrants a work order. This article covers how to create and send a survey from the Admin Portal.

Before You Begin

You will need at least one active surveyor in the system before you can create a survey. If you have not set one up yet, head to the Surveyors page in the left navigation and create a record there first. The surveyor will need a username and password, which become their login credentials for the Survey Portal. Once that is in place, come back here and you are ready to go.

Creating the Survey

Navigate to the property you want surveyed. Find the trade you want to cover and click New Survey. A creation form will open with just a few fields to fill out.

Due Date is required and must be a future date. This is the deadline for the surveyor to complete and submit their findings.

Surveyor is an autocomplete search field. Start typing the surveyor's company name and select from the results. Only active surveyors will appear in the list.

Special Instructions is your chance to set the surveyor up for success before they arrive. Access codes, on-site contacts, specific systems to prioritize, areas that are off-limits, or particular questions you need answered all belong here. The more useful context you give a surveyor upfront, the better the report you get back.

The property and trade are already set based on where you started the form, so you do not need to select those.

Sending the Survey

When you save the form, Sytewise creates the survey and lands you on the survey detail page. Take a moment to look everything over. The survey email has not gone out yet, and this is your chance to catch anything before the surveyor is notified.

When you are ready, click Send Survey. Sytewise will send an email to the surveyor's address on file with the survey details, due date, special instructions, and a login link to the Survey Portal. From there the surveyor takes it and the field work begins.

What Happens Next

Once the surveyor submits their findings you will be able to review the results on the survey detail page, including fixture conditions, part statuses, notes, and any photos they uploaded. From there you decide what warrants a work order and what does not. That review step is yours, and it is intentional.

For a complete walkthrough of survey results, surveyor permissions, and how surveys fit into your broader maintenance workflow, see Surveys and Surveyors.

Additional Reading:

- Surveys and Surveyors -- the complete reference for everything the survey system can do
- Surveys and Surveyors: Reading Survey Results -- understanding what comes back when a surveyor submits
- Surveys and Surveyors: Surveys in the Work Order Chain -- how assessments and work orders work together
- Creating and Managing Work Orders -- turning survey findings into actionable vendor assignments

Supporting setup:

- Surveys and Surveyors: Setting Up a Surveyor -- creating records, login credentials, and permissions
- Surveys and Surveyors: Surveyor Permissions -- understanding Can Edit and Can Create and when to use them

Broader workflow context:

- Building an Annual Workflow with Reminders -- scheduling recurring surveys so nothing falls through the cracks
- Fixture Page -- Managing, Editing Parts Status

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