

# 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 in the survey portal by searching for a property, selecting a trade and completing the form.

The screenshot shows the 'Create A New Survey' form. At the top, there is a search bar with 'Cookeville' entered and a magnifying glass icon. Below the search bar, the form is divided into several sections. The first section, 'Select A Property', has the instruction 'to see trades.' and lists three properties: '[5115] 032 COK Cookeville TN Cookeville Commons' with address '560 S Jefferson Ave STE B, Cookeville, TN 38501, USA', '[5261] Test Property One' with address '560 S Jefferson Ave STE+B%2C, Cookeville, TN 38501, USA' (which is selected with a checkmark), and '[5262] Test Property Maintenance' with address '560 S Jefferson Ave STE C, Cookeville, TN 38501, USA'. The second section, 'Select A Trade', has the instruction 'to create a new survey.' and lists seven trades: '[5440] Intrusion', '[7624] Doors' (selected with a checkmark), '[7627] HVAC', '[7628] Plumbing', '[7647] Dock', '[7649] Facilities', and '[7651] Landscaping'. The third section, 'Due Date', has a date picker set to '2021-11-25'. The fourth section, 'Special Instructions', has a large text area. The fifth section, 'Property Address', has a text field with '560 S Jefferson Ave STE+B%2C, Cookeville, TN 38501, USA'. Below this is a checkbox labeled 'Send email to joe@sytewise.com'. At the bottom is a blue button labeled 'Create Survey'.

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!”

Fixture HVAC PM 2021 2nd Qtr - Apr

Close

HVAC PM 2021 2nd Qtr - Apr

HVAC PM 2021 2nd Qtr - Apr

Save Fixture

☐ This fixture DOES NOT EXIST!

Parts

HVAC PM 2021 2nd Qtr - Apr HVAC PM 2021 2nd Qtr - Apr

MFG: NA ModelNo: NA

Edit Part

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

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