

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: 'Select A Property to see trades.' with a list of properties including '[5115] 032 COK Cookeville TN Cookeville Commons' and '[5261] Test Property One' (which is selected with a checkmark); 'Select A Trade to create a new survey.' with a list of trades including '[5440] Intrusion' and '[7624] Doors' (which is selected with a checkmark); 'Due Date' with a date picker set to '2021-11-25'; 'Special Instructions' with a text area; 'Property Address' with a text field containing '560 S Jefferson Ave STE+B%2C, Cookeville, TN 38501, USA'; and a checkbox for 'Send email to joe@sytewise.com'. A 'Create Survey' button is at the bottom.

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

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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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