

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 this is a section titled 'Select A Property to see trades.' which contains a list of properties. The first property is '[5115] 032 COK Cookeville TN Cookeville Commons' with address '560 S Jefferson Ave STE B, Cookeville, TN 38501, USA'. The second property is '[5261] Test Property One' with address '560 S Jefferson Ave STE+B%2C, Cookeville, TN 38501, USA' and is highlighted with a blue background. The third property is '[5262] Test Property Maintenance' with address '560 S Jefferson Ave STE C, Cookeville, TN 38501, USA'. Below the property list is a section titled 'Select A Trade to create a new survey.' which contains a list of trades. The first trade is '[5440] Intrusion'. The second trade is '[7624] Doors' and is highlighted with a blue background. The third trade is '[7627] HVAC'. The fourth trade is '[7628] Plumbing'. The fifth trade is '[7647] Dock'. The sixth trade is '[7649] Facilities'. The seventh trade is '[7651] Landscaping'. The eighth trade is '[7652] Misc'. Below the trade list is a section titled 'Due Date' which contains a date picker set to '2021-11-25'. Below the due date is a section titled 'Special Instructions' which contains a text area. Below the special instructions is a section titled 'Property Address' which contains a text field with the address '560 S Jefferson Ave STE+B%2C, Cookeville, TN 38501, USA'. Below the property address is a checkbox labeled 'Send email to joe@sytewise.com'. At the bottom of the form 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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