

# 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.

+ Survey

+ Contract

+ WOs




Enter a note and hit return

Create A New Survey

×

Due Date



2021-11-25

Surveyor

Joe's Surveys

Special Instructions

Close

Save

Revision #1

Created Thu, Nov 18, 2021 10:33 PM by Joe Smith

Updated Thu, Nov 18, 2021 10:48 PM by Joe Smith