

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.

● Keys

● Landscaping

● Lights

● Lights Interior



+ 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

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