

3. Survey Portal Documentation

Helpful information for users of the Sytewise Survey Portal

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Getting Started with Surveys

Here's How to Navigate the Survey Portal and Open a Survey.

Survey Portal Navigation

The Survey Portal is a Survey Vendor's listing of all of the surveys they have pending and ones that they have completed. The Survey Portal also allows a Surveyor to update their User Name, Password, and Company Data.

There are two ways to get to the Log In Screen of your Survey Portal:

- Use the Link <http://survey.sytewise.com>
- Click on the Login to Do Survey button in the Survey Request Email

The image above is a the Survey Request email. Notice that it has the Property Name, Address, Due Date, and Survey ID. You can go directly to the Survey Portal login just by clicking the Login To Do Survey button right under the Property Address.

Logging In:

Hello Jeff Surveys
Here is a new survey request for you.
Survey ID: 259
Due Date: Fri Mar 27 2020
Property: East Community Center
<http://survey.sytewise.com>
[East Park, 700 Woodland St, Nashville, TN 37206, USA](#)

However you choose to get to the Login Screen, login to the Survey Portal using the credentials given to you by your Administrator or the Company Admin that established your Survey Portal access. Enter your User Name and Password and click Enter after reading the Terms and Conditions.

Login To Do Survey

Survey Portal Home Page:

The Survey Portal is your home base for every survey you are asked to complete. Each Survey is an individual item and can be from any Property, for any trade. It is important to know that the Survey keeps a record of every Survey you've done, and the ones you still have to complete. The entire record of your Surveys is included in your portal. It is a great reference for what work you've done and when it was completed.

Surveyor Login

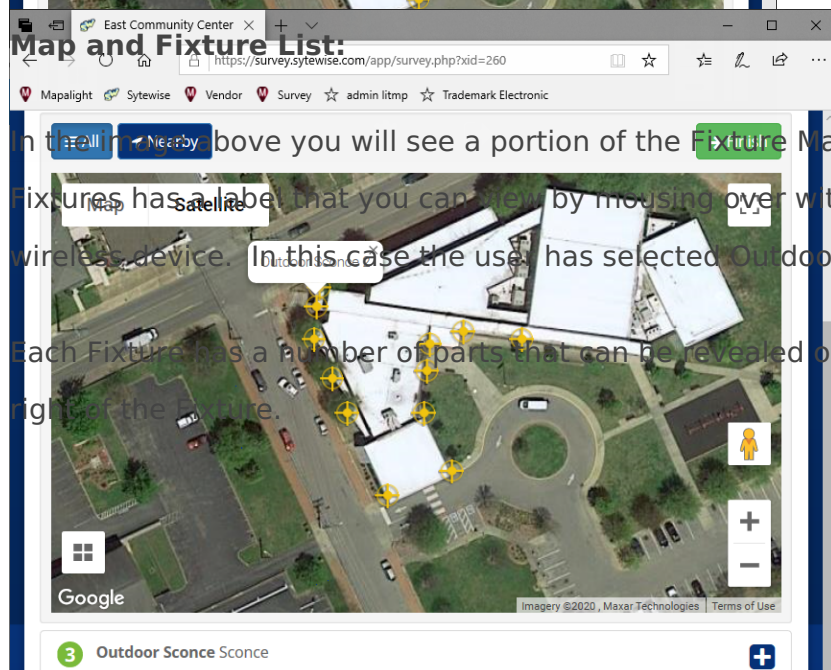
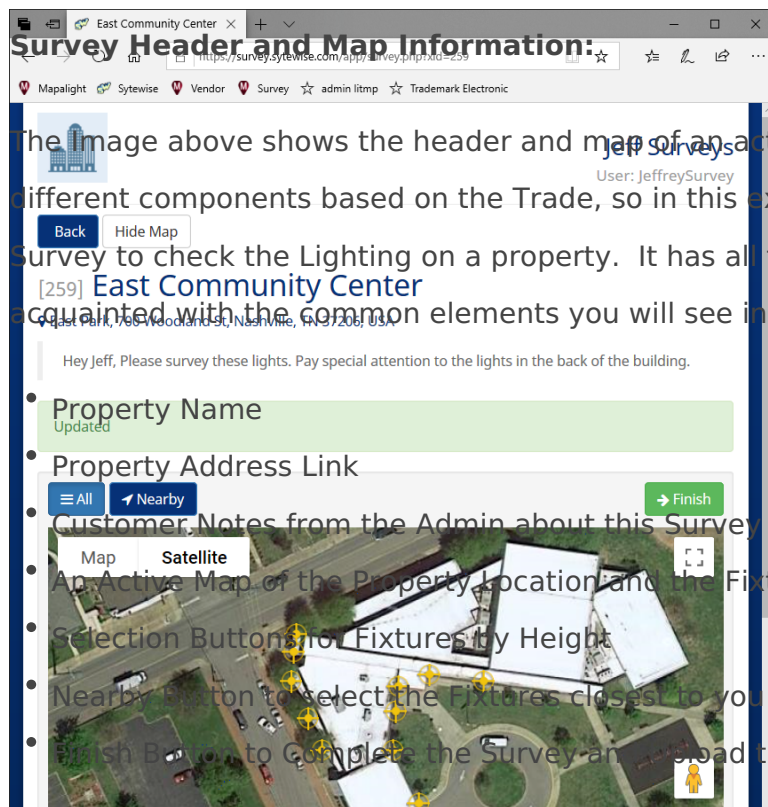
In the image above you will see the major parts of the Survey Portal Home Screen:

• Survey Company and the User Name of the Surveyor
• The Company that Sent the Survey

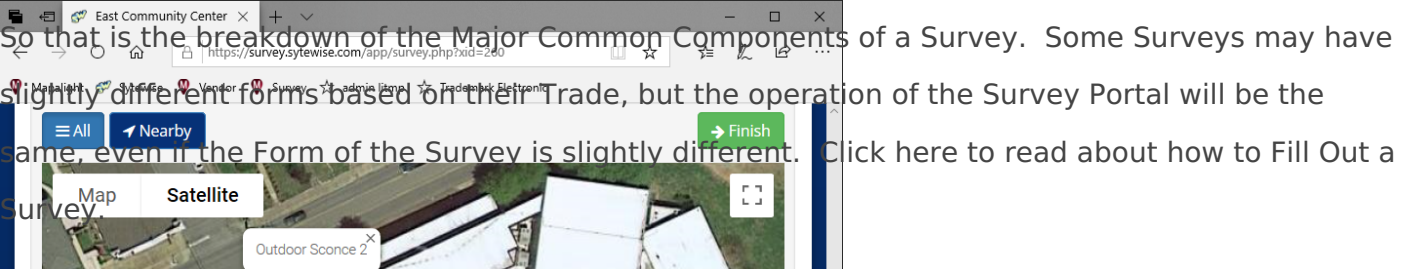
Jeff Surveys
User: JeffreySurvey

- Buttons to Select either the Active or Completed Surveys
- A list of Active Surveys (Completed Surveys are under the Completed Page)
- Icons at the bottom for the Home Screen, Company and Password Information, and the Exit Icon

The Home Screen is pretty simple to navigate and easy to track down the Survey you want to conduct. When you find the Survey you are ready to complete, click on it or select it from the list.



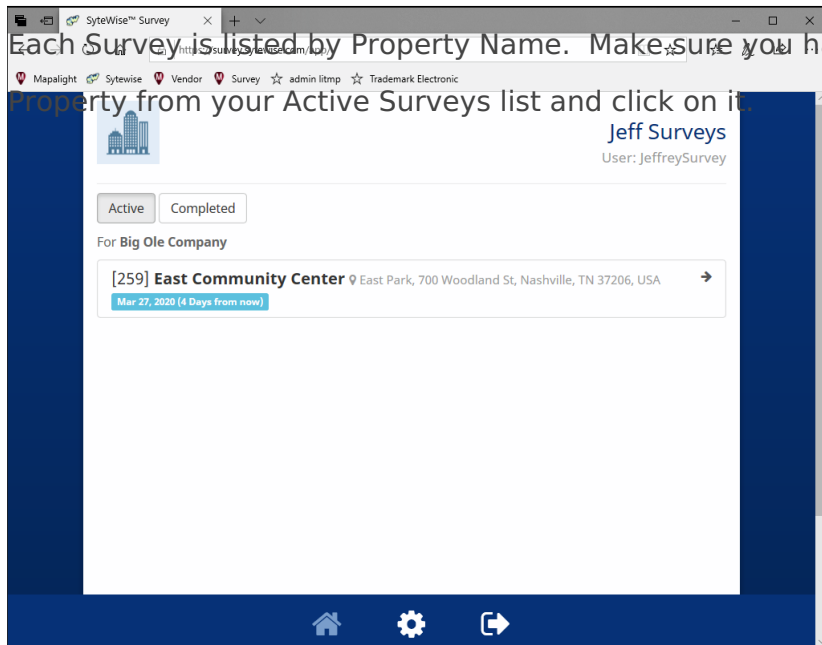
Each Part can be listed as Needing Service simply by toggling the button from Green to Red. In the next image you will see that **Lamp B** in the **Outdoor Sconce 2** Fixture is listed as not burning and needing service.



Completing a Survey

Completing a Survey is easy in Sytewise and it starts by finding the Survey you want to complete. When you are ready to complete the Survey you can go to your Survey Portal and look through your list of Active Surveys, or click on the Survey Request email notice you received from your Company Administrator or your Customer..

Either way, Open the Survey and Start the work. In this example we'll be using a Lighting Survey. Lights are a simple survey, easy to complete, and will get you familiar with all of the components of a Sytewise Survey.



Each Part will have a Green/Red Switch that can be flipped to the opposite color by clicking with a mouse or touching the button on your wireless device. Green means the Part is operational. Red means the part need service.

As you complete a Lighting Survey, every lamp that isn't burning needs the status button to be selected from Green to Red. The same would be true for any other type of Survey. If the part needs service.