Create a Survey (if required)

If a Site Survey is required you can set this in the Job Survey section

TIP: Remember to set the drop to Survey Creation Status to "Create Surveyor Calendar Entry" in order to create the Survey. If this is NOT set to Create Survey Celendar Entry to Survey record and appointment will NOT be created.

TIP: If Office 365 Email Integration is setup and part of your package this will create a calendar entry in the users diary at this point.

You can check if the Appointment has been created by clicking on the Appointments tab and see the appointment record.

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