

# Create a Survey (if required)

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

The screenshot shows the 'JOB SURVEY' section of a software interface. A red box highlights the following fields:

- Survey Start Date/Time: [Date/Time picker]
- Survey End Date/Time: [Date/Time picker]
- Surveyor 1: [Dropdown menu]
- Surveyor 2: [Dropdown menu]
- Send SMS Job Survey Reminder to Account: [SMS Not Sent]
- Send Email Job Survey reminder to Account: [Email Not Sent]
- Survey Creation Status: [Surveyor Appointment Not Yet Created]
- Survey Worksheets: [List containing 'Site Survey Hazard Form' and 'Solar Survey']

A red arrow points to the 'Survey Worksheets' area.

**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 Calendar Entry to Survey record and appointment will NOT be created.**

The close-up shows the 'Survey Creation Status' dropdown menu with the following options:

- Create Surveyor Calendar Entry
- Surveyor Appointment Not Yet Created
- Create Surveyor Calendar Entry
- Surveyor Appointment Created
- Cancel Surveyor Appointment Entries
- Recreate Surveyor Appointments

A red box highlights the 'Create Surveyor Calendar Entry' option, and a red arrow points to it.

**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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### BOILER INSTALL ☆

BASIC Location/Timing Worksheets Attachments **Appointments** Financials POs P & L T/S Expenses ACTIONS

Name	Assigned to	Start Date/Time	End Date/Time	Action
Survey-Boiler Install-Rakata Technology-19 Acacia	Janson	27-03-2024 08:00	27-03-2024 16:30	Delete

Delete All

ACTIVITIES +  
HISTORY +  
MEETINGS +  
EMERGENCY LIGHTING (TEST CERT) +  
INTEGRAL REPORT SHEET +  
SMS HISTORY +

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## Revision #1

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