

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 the software. 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]
- Survey Creation Status: [Dropdown menu set to '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. Below the red box, there are fields for Surveyor 2, Send SMS Job Survey Reminder to Account, and Send Email Job Survey reminder to Account.

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 screenshot shows the 'Survey Creation Status' dropdown menu. The menu is open, showing 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.

JOBS

SCHEDULER

STOCK & EQUIPMENT

CRM

CONFIGURATION

VEHICLES

ALL

Diary

Jobs

Search...

Adam

Create Jobs

View Jobs

Import

Job Report (BW)

Timeline Diary

Grid Diary

Export Payroll Data

Vehicle Tracker

Export P&L Report

Job Meeting & Invoice report

Employee Day View

JOB STATUS

COLOUR

Pending

Survey Booked

Survey Completed

Quote Sent for Authorisation

Quote Accepted

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	<div>Delete</div>

ACTIVITIES

HISTORY

MEETINGS

EMERGENCY LIGHTING (TEST CERT)

INTEGRAL REPORT SHEET

SMS HISTORY

Supercharged by SuiteCRM

Powered By SugarCRM

Server response time: 0.06 seconds.

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Revision #1

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