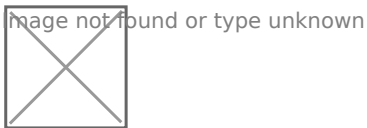


Create a Job Survey/Order (Measure Up)

Within RakataCRM a Survey is a critical piece of the system. Every order, quote, fitting etc has to be based on a Survey. A Survey is where the Order is created and products/costs etc set.

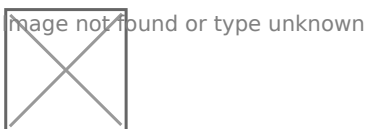
Tip! The Word "Survey" can be renamed to a term more specific to your business. This can be found in Advanced User Settings.

1. Click the "Create Job Survey" button

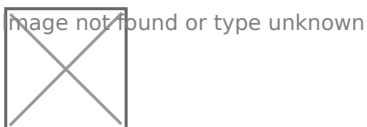


Tip! If you are visiting the site simply select No to the 1st option of "Is a Time/Date required?" which will create a Survey without any dates to visit.

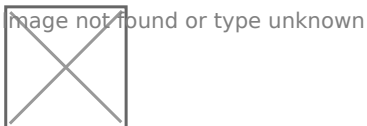
2. Complete the booking form



3. Set the Survey to and from time



4. Select the Surveyor



Tip! Surveyors are users that are in the Surveyor role. To manage users go to Advanced Settings and set the user you wish to be available for booking as a surveyor and mark them as a surveyor

5. Add a specific notes for the survey to see when visiting the property

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6. Choose to send the Customer and any related contact an SMS and Email regarding the survey booking.

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Tip! As soon as the survey is saved the Email and SMS will be sent at this point.

7. Click "Submit" to create the survey appointment

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8. To confirm the Survey has been booked click the Appointments tab

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9. or view in the diary by clicking the Diary button and selecting the Diary of your choice.

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Revision #8

Created 20 March 2024 10:52:56 by RakataTech

Updated 10 June 2024 07:19:37 by RakataTech