

3. Surveys:

This phase of the workflow is controlled by the coordination team and the technicians who need to do the job.

3.1. New Surveys:

These are all sales leads that need site surveys done. Once the sales agent has submitted the lead for a site survey, it will be moved to “Survey” - “New”. It will automatically be assigned to a default user as set up in the sales setting. The default user will usually be the person coordinating and scheduling the field installations.

| | ID | Date | Description | Contact Name | Phone | Email | Assigned To | Status | Survey Status |
|--|-----|---------------------|--|-----------------|------------|----------------------|-----------------|---|---------------|
| <ul style="list-style-type: none"> Leads 11 <li style="border: 2px solid cyan; padding: 2px;">Surveys 7 New 2 Active 2 All Incomplete Completed Success Failed | 280 | 2017-05-05 10:16:31 | The customer would like to upgrade their line to 6mbits uncapped . | Jessica De Pina | 0722222222 | jessica@herotill.com | Jessica De Pina | Survey Required 5 days ago | Required |
| | 281 | 2017-05-05 14:37:30 | | Mark Williams | 0722222222 | mark@herotill.com | Jessica De Pina | Survey Required an hour ago | Required |

3.2. Scheduling Surveys:

To schedule Site Surveys, click on the green **“Site Survey”** button found on the right-hand side of the screen. A screen will now pop-up which will allow you to **schedule** the event as well as **update** the address if need be.

Set Site Survey Status

Survey Event No event selected

Street address

Suburb

Town/City

Postal code

Country



GPS Position

[Show on Map](#)

Drag the marker to the exact location.

[Back](#) [Schedule Survey](#)

No event selected

< >
May 2017
month week

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 30 | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |

Step 1:

To schedule an event, click on the drop-down menu found next to **Survey Event**. Once you can view the calendar, click on the day that you want to schedule the event on.

Add a new Calendar Event ✕

Event Title

Calendar ■ Installations

Teams

Event Date to

Step 2:

Type in the **event title**. Please keep this relevant to the event being scheduled for example Miss Williams - Site Survey.

Add a new Calendar Event ›

Event Title

Calendar ■ Installations

Teams

Event Date

- Installations
- Maintenance
- Operations
- Sales
- Site Surveys
- Standby Roster

Step 3:

Next, is choosing on which calendar you want to schedule the event. Click on the drop-down menu and then choose the relevant calendar for example: **Site Surveys**.

Add a new Calendar Event

Event Title

Calendar

Teams

Event Date

Step 4:

The next step requires you to allocate the event to a team. Click on the drop-down list next to **Teams** and select the team that you want to schedule for the event.

Add a new Calendar Event

Event Title

Calendar

Teams

Event Date

Step 5:

Ensure that you schedule the event on the correct **date** and **time**.

When all the required fields have been filled in, click on the "Add Event" button.

Set Site Survey Status ✕

Survey Event Wed 10 May 2017 10:00 - 10:30 Team.. ✕ ▼

Street address


Suburb

Town/City

Postal code

Country

GPS Position
Drag the marker to the exact location.

**Step 6:**

In the blue section, you can see the **date**, **time** and **team** that has been assigned to the event. If you are happy with this, click on the **Schedule Survey** button.

3.3. Active Surveys:


These are the current surveys scheduled on the calendar which indicates all the site surveys to be completed by the field staff.

3.4. Completing Surveys:

To complete a site survey, click on the green **Site survey** button found on the right-hand side of the screen of the lead profile you are working on.

✕
Set Site Survey Status

| | |
|------------------------------|-----------------------------|
| Site Survey Performed | <input type="checkbox"/> NO |
|------------------------------|-----------------------------|

| | | | | | | | | | | | | | |
|---|--|--|---------------|-------------------------------------|------------------|-------------------------------------|--------------------|-----------------------------------|----------------|---|--|--|--|
| <table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;">Street address</td><td><input type="text" value="28 Caledon Street"/></td></tr> <tr><td>Suburb</td><td><input type="text" value="Bodorp"/></td></tr> <tr><td>Town/City</td><td><input type="text" value="George"/></td></tr> <tr><td>Postal code</td><td><input type="text" value="6529"/></td></tr> <tr><td>Country</td><td><input type="text" value="South Africa"/></td></tr> <tr><td colspan="2" style="text-align: center;"><input type="button" value="Show on Map"/></td></tr> </table> | Street address | <input type="text" value="28 Caledon Street"/> | Suburb | <input type="text" value="Bodorp"/> | Town/City | <input type="text" value="George"/> | Postal code | <input type="text" value="6529"/> | Country | <input type="text" value="South Africa"/> | <input type="button" value="Show on Map"/> | |  |
| Street address | <input type="text" value="28 Caledon Street"/> | | | | | | | | | | | | |
| Suburb | <input type="text" value="Bodorp"/> | | | | | | | | | | | | |
| Town/City | <input type="text" value="George"/> | | | | | | | | | | | | |
| Postal code | <input type="text" value="6529"/> | | | | | | | | | | | | |
| Country | <input type="text" value="South Africa"/> | | | | | | | | | | | | |
| <input type="button" value="Show on Map"/> | | | | | | | | | | | | | |

| | |
|---------------------|---|
| GPS Position | <input type="text" value="(-33.951658, 22.461510999999973)"/> |
|---------------------|---|

Drag the marker to the exact location.

- Pink:** Choose whether the site survey has been performed or not.
- Purple:** Check that the address on the survey is correct.
- Blue:** Once all details have been filled in, click on the **“Complete Survey”** button. The survey will not move onto the next phase of the workflow if it has not been completed.

3.4.1. Successful surveys:

| | |
|------------------------------|--|
| Site Survey Performed | <input checked="" type="checkbox"/> YES |
| Site Survey Result | <input checked="" type="checkbox"/> Success <input type="checkbox"/> Failure |
| Comments | |
| High Site | <input type="text"/> |
| Sales Comments | <input type="text" value="Sales Comments"/> |

- Purple:** Make sure that you choose yes in order to complete the survey. If you choose “No” and click on the **“Complete Survey”** button, then the lead will continue to be under **“Active”** leads as it has not yet been completed.
- Dark Blue:** Choose whether it was a success or a failure. For this example:, the site survey was a success.
The field technician should add comments here: This is a compulsory field. For example:
- Light Blue:**
 - The site survey was successful and I foresee no problems with the installation.
 - High site a bit too far, will need a stronger dish for a successful installation.
 - There are trees that might become an issue if they are not regularly trimmed.
- Green:** Click on the drop-down menu and then choose the high site that the customer will be connected to.
- Yellow:** This section is greyed out because it pulls high site related information from the system and displays it here: For example:
 - High Site has reached maximum capacity.

3.4.2. Failed Surveys:

Set Site Survey Status

| | |
|-----------------------|---|
| Site Survey Performed | <input style="width: 100%;" type="text" value="YES"/> |
| Site Survey Result | <input style="width: 50%;" type="text" value="Success"/> <input style="width: 50%;" type="text" value="Failure"/> |
| Comments | <input style="width: 100%; height: 40px;" type="text"/> |

- Red:** Make sure that you choose yes in order to complete the survey. If you choose “No” and click on the **“Complete Survey”** button, the lead will stay **“Active”** as it has not yet been completed.
- Orange:** Choose whether it was a success or a failure.
The field technician should add comments here. This is a compulsory field that needs to be completed. For example:
 - Electric cables are in the way.
 - The customer has no Line of Site.
- Pink:**

3.5. What happens once the survey has been completed?

3.5.1. Successful surveys:

Leads that have been marked as successful will move to the quotes phase of the workflow. The sales agent can now accurately quote the customer without any surprise costs. The lead will automatically be re-assigned to the original lead owner when it moves to the quotes phase of the workflow.

3.5.2. Failed Surveys:

In cases where the site survey was a failure, the lead will be closed. If at a later stage you need to view any of the details on this lead, you can find it under **Surveys - Failed**. Once the survey has been marked as a failure, you will not be able to move it back to successful surveys.