



## FIELD REPORTING ON ANY DEVICE

# Site Audit Link Customer Quick-Start Guide

Create structured site surveys, keep evidence beside each finding, manage actions and issue a professional branded PDF from your phone, tablet or computer.

|          |                          |          |                         |
|----------|--------------------------|----------|-------------------------|
| <b>1</b> | <b>Choose a template</b> | <b>2</b> | <b>Capture the site</b> |
| <b>3</b> | <b>Review actions</b>    | <b>4</b> | <b>Issue the PDF</b>    |

### One connected survey

Start on site, continue on another authorised device and complete the report later. Downloaded surveys remain available when the signal disappears.



# 1. Create your account and workspace

Start from [siteauditlink.com](https://siteauditlink.com). The 14-day demo is the complete working product for the plan you choose.

**1****Start the demo**

Select Start full demo, then choose Solo or Team. Solo is for one user. Team supports up to five users, including the owner.

**2****Sign in securely**

Use Google sign-in to verify your name and email. Site Audit Link does not receive your Google password.

**3****Confirm the plan**

Confirm the trial through Stripe. No charge is taken on day one. The subscription starts after 14 days unless cancelled before renewal.

**4****Set up the company**

Open Workspace. Add the company name, logo and report branding, choose the default report layout and save the company details.

**Owner tip**

Set the company branding before issuing the first report so every company report starts consistently.



## 2. Choose a template and create an inspection

Templates give every inspection a clear, repeatable structure.

**1****Open Templates**

Preview an available template, copy one for the company, or create a new company template.

**2****Build the structure**

Add sections, questions and guidance in the order the surveyor should follow them on site.

**3****Test the template**

Create a test inspection and confirm that the sequence, answer choices and report output work as expected.

**4****Select New inspection**

Choose the relevant template, then enter the client, site, reference, surveyor and dates.

**5****Assign the work**

On Team, assign the inspection to the correct person and set the target date.

**Language behaviour**

Changing the language translates the interface. Existing template names, client details and text entered by users remain as written.



## 3. Record findings and evidence

Write each finding so a reader who was not on site can understand the location, condition and required next step.

**1****Work through each section**

Answer the questions in order and complete every required item or mark it not applicable where appropriate.

**2****Add a clear finding**

Use a short title, describe what was seen, identify where it is and state what should happen next.

**3****Set category and priority**

Separate positive items, observations, actions and critical findings, then choose the correct priority.

**4****Attach the evidence**

Capture or upload photographs, plans and supporting documents directly beneath the finding they support.

**5****Improve the image**

Add a caption, annotate the relevant detail and blur sensitive information before issue where required.

**Good evidence**

A clear photograph plus a precise description is more useful than several unexplained images in a camera roll.



## 4. Work offline and manage actions

Prepare the survey before entering a low-signal area and reconnect safely before moving to another device.

**1****Prepare while connected**

Open the inspection on the device before travelling to the site and make sure it is available offline.

**2****Continue the fieldwork**

Complete questions, findings and notes on the downloaded copy when the connection drops.

**3****Reconnect and synchronise**

When a reliable connection returns, reopen the survey and allow its changes to synchronise.

**4****Create accountable actions**

Record what must happen, assign an owner on Team, set the priority and add a realistic due date.

**5****Monitor the Action centre**

Use open, overdue, critical and unassigned filters. Resolve unassigned and overdue items first.

**Important offline habit**

Do not edit the same inspection on two offline devices at once. Synchronise before continuing on another device.



## 5. Review and issue the report

Complete a final quality check before the report leaves the company.

**1**

### **Complete the review**

Check required answers, finding wording, evidence, priorities, action ownership and report details.

**2**

### **Approve where required**

Team workspaces can use manager approval before an inspection is issued or closed.

**3**

### **Generate the PDF**

Create the report using the saved company branding and preferred report layout.

**4**

### **Check and download**

Open the finished PDF, review the contents and save the client-ready file to the device.

| <b>Solo</b>                     | One user, survey builder, offline working and branded PDFs.                                 |
|---------------------------------|---------------------------------------------------------------------------------------------|
| <b>Team</b>                     | Up to five users including the owner, assignments, approvals and dashboard.                 |
| <b>Security</b>                 | Google sign-in, protected surveys, private evidence and controlled workspace roles.         |
| <b>If changes are missing</b>   | Reconnect, reopen the inspection and allow synchronisation before editing elsewhere.        |
| <b>If the PDF is incomplete</b> | Return to the inspection and check required answers, findings, evidence and report details. |

### **Professional boundary**

Site Audit Link structures and presents the survey record. It does not replace the surveyor's competence, judgement or any certificate or statutory record required for the work.