Managing Properties and Assets

Sytewise is a powerful asset management tool that has a property-centric view of fixtures and devices that need maintenance and regular service.

- Creating and Managing Work Orders
- Setting Up Vendors in Sytewise
- Building an Annual Workflow with Reminders
- Reporting in Sytewise: What You Have, How to Use It, and How to Make It Work for You
- Parts: Create, Edit and Clone

Creating and Managing Work Orders

A work order is the engine of property operations in Sytewise. It captures what needs to be done, who's doing it, which fixtures are involved, what it costs, and proves it all happened when the job is done. This article walks through every step from creating the work order to closing it out, including how to reassign it, attach checklists, and add line items along the way.

Starting a Work Order

Work orders are created from the property detail page. Navigate to the property, find the trade you're creating the work order for, and click the **New Work Order** button. The work order modal opens and immediately gets to work on your behalf.

The Work Order Modal

The modal is organized into two columns. The left side handles the job details. The right side handles fixtures, instructions, and email configuration.

Subject and Dates

Subject is auto-filled with the property name and "WO" as a starting point. You'll almost certainly want to change this to something that describes the actual work. Keep it specific enough that it means something six months from now when it shows up in a report. Four characters minimum.

Order Date defaults to today. Change it if you're backdating or scheduling in advance.

Due Date defaults to five business days out from the order date. Adjust it to match the actual deadline. This is the date the system uses to flag the work order as overdue if it hasn't been completed.

Work Start Date is optional. Check the **Include a Work Start Date?** checkbox and a second date field appears. Use this when the vendor needs to know when they can begin the work, separate from when it needs to be done.

Vendor

The **Vendor** field is pre-filled with the default vendor assigned to this property/trade combination. If the right vendor is already there, leave it. If you need someone different, start typing a vendor name and the autocomplete will find them. As soon as a vendor is selected, their contact emails load automatically in the email section below, ready to be checked or unchecked.

If the vendor field shows no name or the wrong name, it means either no default vendor is set for this trade or the default needs to be updated on the property record. See the vendor setup article for how to assign default vendors to property trades.

Contract and Costs

If the property has active contracts, a **Select a Contract** dropdown appears. Selecting a contract auto-fills the **Reference Number** with the account number from that contract and may pre-populate the **Total** field with the contract's monthly fee. Both are editable.

Add Line Item lets you build out a cost breakdown directly in the modal. Each line item has a description, amount, and total. Add as many as the job requires. Line items can also be added and edited after the work order is created, so don't let an incomplete cost picture hold up the process.

Fixtures

The right column shows every fixture in the property/trade. This is where a common question comes up: do you have to flag a fixture for maintenance before you can add it to a work order?

No. Every fixture in the property/trade is available to add to a work order regardless of its current

status. The colored status indicator next to each fixture (green for all items working, yellow or red for partial or full outage) is informational. It tells you the state of that fixture at a glance, but it doesn't gate whether you can include it in the work order. If a fixture needs attention, add it. If you want to include fixtures as part of a routine service visit even though nothing is broken, add them. The choice is yours.

Click **All** to select every fixture at once. Click **None** to deselect. Or check individual fixtures one by one. Fixtures highlighted in green are already included in another open work order, which is useful context before you add them to a second one.

Special Instructions and Files

Special Instructions is a free-text field for anything the vendor needs to know before they show up. Access codes, safety requirements, specific contacts to call on arrival, scope details that don't fit in the subject line. It all lands in the email the vendor receives.

Add A Zip File lets you attach a reference document, drawings, spec sheet, or any supporting file that should travel with the work order.

Checklists

If fixtures are selected and existing checklists are available for those fixtures, a checklist chooser appears below the fixture list. Check any checklists you want to attach to this work order. Attached checklists are included in the vendor email as direct links. The vendor opens the email and has both the work order and the checklist tasks in the same message.

If the checklists you need don't appear here, it's likely because they haven't been created yet or they're assigned to a different vendor. Checklists can also be linked to the work order after it's created.

Email Recipients

Vendor Contacts appear as checkboxes showing each contact on file for the selected vendor with their name and email address. Check the contacts who should receive this work order. If the vendor has no contacts in the system, a warning appears here. That's your cue to go add contacts

to the vendor record before sending.

Admins to receive the WO emails lists the admin users in your account. Check any who should receive a copy.

Include Management in WO Emails is a checkbox that adds property management contact information to the body of the email sent to the vendor, useful when the vendor may need to reach someone on-site.

Saving

Click **Save** and the work order is created. You land on the work order detail page where the full record lives.

The Work Order Detail Page

The work order detail page is where everything about the job is visible and manageable. It's worth knowing what's where.

The header shows the work order number and subject. Superusers can click the pencil icon to edit the subject after creation.

The left column shows the key metadata: order date, start date (if set), due date or completion date, the admin user assigned, the associated contract, the fee, account number, and any bills linked to this work order.

The middle column is the notes section. Add notes here at any point during the life of the work order. Notes are timestamped and attributed to whoever adds them. Use notes to document conversations with the vendor, status updates, changes in scope, or anything relevant to the job. These notes also appear in the property print report, so they contribute to the permanent record of the property.

The right column shows the vendor, admin contacts, and client (if one is assigned to the property).

Editing the Work Order

While the work order is open, an edit form sits below the header. From here you can update the subject, instructions, assigned user, contract, fee, order date, start date, due date, and account number. Click **Save** to apply changes.

Fixtures, Line Items, and Checklists on the Detail Page

Fixtures appear in a table below the edit form showing the fixture name, part number, description, and status. Each row expands to show individual parts when clicked. Fixtures are added during creation and are shown here as a read-only reference. The fixture table updates with status outcomes when the vendor submits their report through the vendor portal.

Line items appear in an editable table. Add new items using the input row at the bottom: enter a quantity, description, amount, and line total, then click the plus button. Edit existing items by clicking the pencil icon on any row. The fields become editable in place. Press Enter or click save to commit the change. Delete items with the X icon. This makes it easy to update costs as the job scope evolves.

Linked Checklists appear in their own section below the fixtures. If you didn't attach checklists during creation, you can add them here. The dropdown shows all checklists that are eligible for this work order, meaning they share the same vendor, property, and trade. Select one from the dropdown and click **Link Checklist**. To remove a linked checklist, click the trash icon next to it and confirm.

Sending the Work Order to the Vendor

When you're ready, click **Send Work Order**. This triggers the email to all checked vendor contacts and admin users. The email includes the work order details, the vendor link for accessing the portal, any instructions, fixture information, attached checklist links, and line item costs.

The **Email Log** section at the bottom of the work order page records every email sent: who it went to, when, and whether it was delivered successfully. Green rows are successful sends. Red rows are failures. This log is included in the work order print report, so you always have documented proof of when the vendor was notified.

The Send Work Order button only appears if the vendor has a valid email address on file. If it's missing, go to the vendor record and add contact information first.

Reassigning the Work Order to a Different Vendor

Vendors change. Schedules conflict. A better option becomes available mid-job. Reassigning a work order is straightforward and the system handles the downstream effects automatically.

On the work order detail page, find the vendor section in the right column and click **Change Vendor**. An autocomplete field appears. Search for the new vendor, select them, and their contacts load as checkboxes. Check the contacts who should receive the reassignment email. You can also update which admin users receive a copy.

Click **Update Vendor** when ready. Several things happen at once:

The work order vendor record is updated. The old vendor contacts are deactivated. The new

vendor contacts are recorded. A new email goes out immediately to all selected recipients with the full work order details. And every checklist linked to this work order that hasn't been completed yet is automatically updated to the new vendor so the checklist assignments stay in sync.

Updating admin contacts only (without changing the vendor) uses a separate **Update Admin Contacts** button and does not send a new email.

Completing and Closing a Work Order

There are two ways to mark a work order complete.

Mark complete at creation by checking the **Status: Complete** checkbox in the creation modal. This is useful when you're creating a historical record for work that already happened.

Close from the detail page using the **Close Without Changes** button, available to superusers. This marks the work order complete, records the current date and time as the completion date, and adds an automatic note logging who closed it. Use this when the work is done and no fixture status updates need to be recorded from the vendor portal.

If a work order needs to be reopened after being closed, the **Reopen Work Order** button appears in place of the close button on completed work orders. Clicking it clears the completion date and puts the work order back into the active queue.

Keeping It Organized

A few habits make work orders more useful over time.

Write descriptive subjects. "HVAC Service Visit" is far more useful in a report six months later than "WO 142." The subject appears in property reports, work order search results, and vendor emails. Make it count.

Use notes generously. Every status update, vendor conversation, or scope change is worth a note. The note history on a work order tells the story of the job. When a question comes up about what happened, the notes are the answer.

Attach checklists whenever the job involves documented work. A completed checklist attached to a work order gives you photographic evidence, signed acknowledgment, and a step-by-step record of what was done. That combination is hard to argue with.

Set accurate due dates and update them when they change. The overdue indicator on the work order detail page and the dashboard count of open work orders both depend on due dates being realistic. A work order set due two years from now is invisible to the system's urgency tracking.

Setting Up Vendors in Sytewise

Vendors are at the center of how work gets done in Sytewise. Before you can issue a work order, assign a checklist, or track who serviced what, the vendors doing that work need to be in the system. This article covers every way to add vendors, how to organize their contacts, and why assigning default vendors to your property trades is one of the most time-saving things you can do.

Three Ways to Add Vendors

Add Vendors One at a Time

The **Vendors** page has a collapsible **Create A New Vendor** section. Fill it out and you have a vendor in the system.

Required fields:

- **Company Name** — must be unique in your account
- **Phone Number** — primary contact number for the company
- **Company Email** — the main inbox for this vendor
- **Login Username** — the vendor's credential for accessing their portal
- **Password** — at least 8 characters, one capital letter, and one number
- **Address** — the vendor's physical business address

Before you can save the record, you need to click **Lookup Geolocation**. This validates the address through Google Maps and stores the coordinates used for distance-based vendor searches. The **Create Vendor** button won't appear until that step is done, so don't skip it. Vendors can have multiple address in the system.

Optional fields include a **Description** and a **QuickBooks ID** if your account uses QuickBooks for accounting reference.

Import Vendors from a CSV

If you're bringing a vendor list over from a spreadsheet or another system, the **Import Vendors List** section on the Vendors page accepts a CSV upload. The required columns are Company Name, Email, and Phone. Address, Description, Username, and Password are optional. If a username or password isn't included, Sytewise generates one automatically.

A sample CSV file is available to download directly from the import section so you can see the expected format before you build your file.

Import from the Sytewise Vendor Network

Sytewise maintains a broader vendor network shared across accounts. If a vendor you work with is already in the system from another account, the **Import Sytewise Vendors** section lets you search for them by name and add them directly to your account without re-entering their information.

Building Out a Vendor Record

Once a vendor is created, their detail page is where the full picture lives. A few things worth setting up here before you start issuing work:

Contacts are the people at the vendor company who receive communications. Work order emails and checklist notifications go to vendor contacts, not just the generic company email. Add the right contacts and the right people get notified automatically when jobs are assigned.

Insurance and W-9 tracking is built into every vendor record. If a vendor has a current insurance certificate on file, a badge appears on their record and on the vendor list so you can see coverage status at a glance without digging. Same for W-9 status. No more spreadsheets tracking who sent their cert and who hasn't.

Working Trades shows which trades this vendor has performed or been assigned to. This builds over time as work orders are issued and completed.

Alternate Vendors can be added to a vendor record for situations where the primary vendor is unavailable. Having alternates ready means you're never stuck searching for a backup when the regular vendor can't make it.

Default Vendors: The Part Worth Getting Right

Here's where the real efficiency lives. In Sytewise, vendors aren't just assigned to properties — they're assigned to specific **trades within a property**. That combination, a property plus a trade, can have a **default vendor** that Sytewise uses to pre-fill work orders automatically.

When you open the new work order modal for a property, Sytewise looks at which trade the work order is for and fills in the default vendor for that trade automatically. The vendor field arrives pre-populated with the right company, and their contacts load up ready to select as email recipients. You don't have to search, you don't have to remember who handles HVAC at that building. It's just there.

This matters more as your portfolio grows. A property with ten trades and a different vendor for each one becomes a mental load fast. Default vendors eliminate that load entirely for the routine case.

How to Assign a Default Vendor to a Trade

When adding a new trade to a property: The New Trade modal includes a vendor search field

right in the form. Select the trade, search for the vendor, and both are saved together. The default vendor is set from day one.

For an existing trade: On the property detail page, click into the trade tab, find the **Vendor** card, and click **Change Vendor**. Search by name, select the vendor, and the assignment updates immediately.

Find vendors by distance: Not sure who's closest? The Vendor card on a property trade lets you search for vendors by proximity: 10, 25, 50, 100, or 250 miles from the property. Results come back ranked by distance so you can make an informed choice before assigning.

Why Default Vendors Pay Off

The short version: every work order you create for a property trade with a default vendor set takes one fewer decision. The vendor is pre-selected, their contacts are loaded, and you move straight to describing the work and setting the due date. Also, if anyone has to pinch hit for your projects, the vendor you have a relationship with is a known quantity.

Multiply that across every work order your team issues in a month and it adds up quickly. More importantly, it reduces the chance that a work order goes to the wrong vendor because someone picked from a list in a hurry.

If the default vendor ever changes because of a new contract or a better relationship with a different company, updating the property trade record takes fifteen seconds. Every future work order for that trade at that property picks up the new default automatically.

Building an Annual Workflow with Reminders

Reactive property management is exhausting. Something breaks, you scramble. A vendor falls through, you scramble again. The antidote is a planned calendar of recurring work that runs itself in the background, so when the unexpected does show up, you already have the routine under control.

The Reminders system in Sytewise is how you build that calendar. Set up your recurring inspections, work orders, and service checks once, and the system generates the actions, notifies the right people, and keeps a running record of what got done and when.

Two Things Worth Understanding First

Reminders in Sytewise have two parts that work together.

Reminder Sources are the rules. They define what the reminder is, when it repeats, who it's for, and what it creates when it fires. You set these up once and they run as long as you need them to.

Reminder Actions are the individual instances. Each time a reminder source fires, it generates an action on that date. Actions show up in your Incomplete Reminder Actions list and on the calendar, waiting for you to acknowledge or act on them.

Think of the source as the recipe and the action as each meal it produces. You write the recipe once. Dinner shows up on schedule.

Creating a Reminder

From the Reminders page or from within any property, work order, survey, fixture, or contract record, click **New Reminder** to open the reminder form.

Subject is required and becomes the label you'll see on the calendar and in the actions list. Be specific. "HVAC Filter Check" is more useful than "Maintenance" when you're looking at a full year of planned work.

Priority marks the reminder with a red indicator so it stands out in the list. Use it for anything time-sensitive or compliance-driven.

Message is the details. Instructions, notes, context for whoever is handling the action.

For lets you assign the reminder to a specific user on your team. Leave it as "For Me" if you're the one handling it. The **Plus Everybody** checkbox makes the reminder visible to all users regardless of who it's assigned to, useful for team-wide visibility on shared responsibilities.

Single Reminders vs. Recurring Reminders

Leave the **Repeating?** checkbox unchecked and you get a simple one-time reminder. Pick a due date and it shows up once.

Check **Repeating?** and the form expands into a full recurrence builder. This is where the annual workflow lives.

Starts and **Ends** define the window the recurring reminder is active. Check **Repeat Forever?** if the work has no planned end date (routine maintenance, annual inspections) or set a specific end date for things tied to a contract or lease term.

Frequency Options

Daily creates an action every day. Best for short-term tracking situations or daily checklists on active job sites.

Weekly lets you choose specific days of the week and an interval. Every Monday. Every other Friday. Every two weeks on Tuesday and Thursday. Weekly reminders are good for recurring vendor check-ins, safety walkthroughs, or any work that happens on a regular weekly schedule.

Monthly lets you pick specific days of the month and how many months between occurrences. The 1st of every month. The 15th and last day of every other month. Monthly reminders handle lease deadlines, billing cycles, filter changes, and equipment logs.

Yearly repeats on the same calendar date each year, with an interval if you need every two or three years instead of every one. Annual inspections, equipment certifications, fire system tests, and anything tied to a specific time of year all live here.

Attaching Reminders to Records

Reminders get much more powerful when they're attached to the records they relate to. When you create a reminder from within a property, work order, fixture, or contract, a checkbox appears asking whether to link the reminder to that record.

Leave it checked. Linked reminders appear in context when you open that record, and the action in your list will include a direct link to the related property, vendor, fixture, or contract so you're never hunting for context.

The Part That Makes Recurring Work Orders Possible

When you create a reminder attached to a work order, a second checkbox appears: **Replicate this Work Order**. This is the feature that closes the loop between planning and execution.

When this box is checked, Sytewise stores a snapshot of the work order including the subject, instructions, vendor, line items, fixtures, and fee. Every time that reminder fires and you click the action to complete it, the system offers to generate a brand new work order with all of that information pre-loaded. You confirm, the work order gets created in the queue, and you adjust the due date and send it to the vendor.

The same option exists for surveys. Check **Replicate this Survey** when attaching a reminder to a survey record, and each annual or recurring action gives you a ready-to-send survey with the same surveyor, structure, and instructions.

This means the recurring maintenance work order you build once in January can reproduce itself every quarter, every year, or on whatever schedule you define, without rebuilding it from scratch each time.

The Calendar View

The Reminders page has a calendar in the right panel showing all your upcoming reminder events. Future events appear faded so you can easily distinguish between what's already arrived and what's on the horizon. Click any event on the calendar to see its details.

Use the **Current/Upcoming** and **Completed** toggles to switch between your active queue and your history. Completed actions stay in the record so you always have a log of when work was done, by whom, and against which reminder source.

Notifications and the Actions List

When a reminder action arrives, it appears in the **Incomplete Reminder Actions** list on the Reminders page and increments the badge counter in the navigation. If you haven't seen it yet, it also appears as a toast notification in the upper right corner of the screen.

You can filter the actions list by reminder type to focus on just work orders, just surveys, just properties, or any other category. Click any action to navigate to the related record, or click the pencil icon to edit the reminder source settings without leaving the list.

If a category of planned work no longer applies, you can clear actions individually or use **Clear All Incomplete Actions** to dismiss the whole list at once. Note that clearing actions does not create work orders or surveys automatically, it only marks them as handled.

If reminder popups are distracting during a focused work session, check **Do Not Show Reminder Popups** in the settings panel at the top of the Reminders page. The actions list still accumulates normally, you just won't get the toast interruptions.

Building Your Annual Calendar

Here is a practical approach to turning the reminders system into a full annual operating calendar for a property or portfolio.

Start with the fixed dates. Annual inspections, fire system certifications, HVAC service contracts, elevator permits, roof inspections, and anything with a regulatory or contractual deadline all get yearly reminders first. These are the non-negotiables. Set them with the exact due date, attach them to the relevant property or fixture, and replicate the associated work order if vendor dispatch is required.

Layer in the seasonal work. Landscaping changeovers, winterization, cooling startup, holiday lighting, pressure washing cycles, and similar seasonal tasks get monthly or yearly reminders tied

to the appropriate time of year. These don't always have regulatory teeth but they do have consequences when they're missed. A reminder that fires three weeks before the service date gives you time to issue the work order and confirm the vendor.

Add the routine recurring checks. Filter changes, pest control, generator exercise runs, fire extinguisher checks, exit lighting tests, and similar recurring maintenance live as monthly or quarterly reminders. Replicate the associated work order for each one so dispatch takes one click when the action fires.

Set reminders for contract and insurance milestones. Attach reminders to vendor contracts and insurance records with a start date set 60 or 90 days before expiration. When the action fires, you have time to renew before anything lapses. No surprises.

Assign the right people. A reminder nobody sees is just a calendar event. Assign each reminder to the user responsible for that category of work, and use Plus Everybody for anything with shared visibility. When an action fires, the right person knows.

When all of that is in place, the unplanned work, the burst pipe at 2am, the failed compressor, the storm damage, lands in a context where you already know where things stand, who your vendors are, and what's coming next on the calendar. The planned work runs on its own. You show up for the surprises.

Reporting in Sytewise: What You Have, How to Use It, and How to Make It Work for You

Good reporting is the difference between managing a property and understanding it. Sytewise generates detailed reports at every level of the system, from a single fixture to an entire portfolio, and gives you the tools to turn those reports into a recurring documentation habit that builds a real operational history over time. This article covers what each report includes, how to get it, and how to wire the whole thing into a workflow that practically runs itself.

Property Reports

The property print report is the most comprehensive single document in the system. Open any property, click the print icon, and you get a full snapshot of everything tied to that property at that moment.

What it includes:

The report opens with the property header, address, unit count, and square footage alongside your company's contact information. A map or property image appears at the top depending on what's configured.

From there the report works its way through every layer of the property record:

Contacts lists every person associated with the property, with phone, email, and their role.

Trades and vendors shows which trades are active on the property and which vendor and surveyor are assigned to each one, so anyone picking up the report knows who handles what without having to dig through the system.

Property notes appear in chronological order with timestamps and their source, whether they were entered by an admin, generated from a work order, or submitted through a survey. Reading the notes history of a property tells you the story of that building's issues and resolutions over months and years. That accumulation of notes is genuinely useful when you're trying to figure out why a recurring problem keeps happening.

Fixtures appear as a summary table with status, recent notes, image status, type, and description. If checklists are attached to fixtures, their completion percentages and progress bars appear in the report so you can see at a glance how much documented maintenance has been completed.

Work orders appear in a table with number, date, subject, vendor, due date, completion date, account number, and total fee. The full work order history of a property in a single table is one of the fastest ways to see how much was spent, what vendors were used, and how often specific types of work recurred.

Surveys appear similarly with surveyor, dates, and completion status.

Bills and **insurance/files** round out the financial and compliance picture.

At the bottom, a chart shows fixture status changes over time so you can see visually whether a property's overall condition is trending up, holding steady, or declining.

This report works well as a handoff document when a property changes management, as a quarterly review packet, or as the foundation of a client-facing condition summary.

The Properties Report Page

The **Properties Report** page (separate from the property print view) lets you search and filter

across your entire portfolio and export results as a CSV. You can report by:

- **Trade**: All properties with a specific trade, showing the property name, address, vendor, and client for each.
- **Vendor**: All properties served by a specific vendor across the portfolio.
- **Line item type**: For portfolios with service contracts, report by specific contract line items across all locations.
- **Fixture text search**: Find all properties containing fixtures that match a name, part number, or model.

Every result table has a **Download CSV** button so you can pull the data into a spreadsheet for further analysis or client reporting.

The portfolio-level reporting is where you start to see patterns that individual property views can't show you. Which vendor shows up on the most work orders? Which trade generates the most spend across the portfolio? Which properties have the most open work? The CSV exports make it straightforward to answer those questions.

Fixture Reports

The fixture print report goes deep on a single piece of equipment and its complete documented history.

What it includes:

The header identifies the fixture by name, description, and property context. Any cover image designated as the primary archived photo appears at the top.

Notes appear in chronological order with timestamps, giving you the full running log of everything observed, repaired, or noted about this specific piece of equipment.

Images are displayed in a gallery grid, providing a visual record of the fixture's condition over time. A picture taken during a service call six months ago is still there when a problem recurs, and being able to compare current condition to past photos is genuinely useful for diagnosing whether something got worse or was never properly fixed.

Parts and specifications appear in a structured table with part numbers, manufacturer, model, description, and installation dates. For AV and technical fixtures, this is the complete equipment manifest for that installation.

Checklists attached to the fixture appear in full detail, with every item, its completion status, notes entered, images uploaded, and signatures captured. A fixture that has been through three annual maintenance checklists has three years of documented inspections in this report.

The fixture log at the bottom shows a chart of status changes over time, the same visual history as the property report but scoped to this one fixture.

The fixture report is the document you want when a vendor questions whether a piece of equipment was ever serviced, when an insurer asks for maintenance records, or when you need to make a capital replacement case based on documented decline.

Work Order Reports

Every work order has a print view that serves as a formal record of the job.

What it includes:

The header identifies the work order by number and name. The report shows the from and to parties (your company, the client, the property, the vendor) alongside the account number, issued date, due date, and fee.

Instructions appear in full, followed by any vendor notes and a chronological notes history showing every entry made during the life of the work order.

Fixtures appear in a table showing the fixture name, part number, description, and the status outcome for each one as reported during the work. Status badges (OK, FAIL, FAIL/REP, No Change)

give a quick visual summary of what was found.

Line items show the detailed cost breakdown with quantities, descriptions, and amounts.

The email log at the bottom of the work order print is one of the most underappreciated parts. It records every email sent from that work order, who it went to, when it was sent, and whether it succeeded or failed. This is your proof of notification if a vendor ever claims they didn't receive the assignment.

Work order reports are the natural output at the close of a job. Archiving them by property gives you a searchable maintenance history. The CSV export from the work orders list lets you pull the full WO history for a property, a vendor, a date range, or a trade combination and analyze it however you need.

Survey Reports

Survey reports document what a surveyor observed in the field.

What it includes:

The header identifies the survey, property, and surveyor. The report shows due and completion dates, with color coding for overdue status.

Instructions given to the surveyor appear first, followed by the **submitted fixtures** section showing each fixture the surveyor reviewed. For each one: its on/off status, part number, position, description, surveyor notes, and any images captured during the visit.

Fixture updates and **part updates** capture any changes the surveyor noted during the inspection.

The **email log** records every communication sent as part of the survey workflow.

Survey reports work well as scheduled condition documentation. A quarterly survey with a consistent set of fixtures builds a time-stamped record of how each one looked at each visit, which is exactly the kind of documentation that supports capital planning conversations and vendor

accountability.

Checklist Reports and the Custom Report Engine

Here is where reporting in Sytewise gets genuinely flexible.

A completed checklist is a report. Every item in the checklist is a data point: a note, a photo, a signature, a set of checkboxes, a file upload. The checklist print view presents all of that in a clean, structured document with the fixture and property context, completion percentages, who completed each step, and when.

That means the checklist system is not just a task-completion tool. It is a fully customizable report builder.

Building a Property Condition Report

A property condition report is a structured walk through a property or set of systems that documents what was found, with evidence, signed off by whoever conducted the inspection. Here is how you build one using a checklist template.

Create the checklist template. Go to the Checklists page and create a new template. Give it a name like "Property Condition Report" and set the trade to "Any Trade" so it's available across property types.

Build the checklist items as inspection categories. Each item in the checklist becomes a section of the report. For a property condition report, you might build items like:

- *Exterior Condition* with a note field (required), up to five images (required), and simple checkboxes for items like "No visible damage," "Landscaping maintained," "Signage intact"
- *Parking Area* with a note field and image upload, checkboxes for "No standing water," "Lines visible," "Lighting functional"

- *Roof Access and Condition* with a note field, required image upload, and a signature requirement so the inspector certifies the observation
- *HVAC Units* with a note field, images, and checkboxes for "Units operational," "No visible leaks," "Filters checked"
- *Common Areas* with notes and images
- *Any system, space, or component you want documented*

Use the requirement options to enforce quality. Mark photos as required on any item where visual evidence matters. Require notes on anything where a written observation is necessary. Require a signature on the final summary item to capture who conducted the inspection and certify the report. These requirements mean the checklist can't be marked complete without the evidence being submitted.

Assign it to the property as a fixture checklist. When it's time to conduct the inspection, assign the checklist template to the relevant fixture or property-level fixture, set a due date, choose the inspector as the vendor or internal user, and send the link.

The inspector completes it from their phone. They walk the property, tap through each section, write their notes, upload photos from their camera, check the applicable boxes, and sign off at the end. All of it is submitted and stored.

Print the completed checklist. The checklist print view becomes the condition report: every section, every note, every photo, every checkbox result, every signature, with the date and name of who completed it. It is a fully documented property condition assessment built from a single checklist completion.

The same template can be reused. Assign it again in six months and you have a second condition report. Compare the two and you have a documented record of whether conditions improved, held steady, or declined. Over two or three years, that pattern becomes a legitimate basis for capital planning, vendor performance conversations, insurance documentation, or client reporting.

The template is fully customizable to any report type. A fire safety walkthrough. A move-in/move-out inspection. An AV system commissioning sign-off. A post-storm damage assessment. An annual vendor performance review. An equipment inventory audit. Any structured inspection or documentation process that benefits from notes, photos, signatures, and checkboxes can be built as a checklist template and reused indefinitely.

Turning Reports Into a Recurring System

A report generated once is useful. A report generated on a schedule, consistently, over time, becomes a documented operational history. Here is how to wire reporting into a recurring workflow using the Reminders system.

Create a checklist template for each recurring report type. Property condition report, quarterly HVAC inspection, annual fire safety walkthrough, whatever your portfolio requires. Build the template once so the structure is consistent every time it's run.

Set up a work order with a recurring reminder. Create a work order for the inspection or service, assign the vendor or inspector, and attach the relevant checklist. Then attach a reminder to that work order with **Replicate this Work Order** checked, set to the correct recurrence frequency (quarterly, annually, semi-annually). Each time the reminder fires, one click creates a new work order with the same structure, the same vendor, and the same checklist, ready to be sent.

Set a reminder to assign the checklist directly. For condition reports or inspections that don't require a full work order, create a reminder attached to the relevant property or fixture and set it to the appropriate frequency. When the action fires, you assign a fresh checklist from the template to the fixture, send the link to the inspector, and the report is collected and stored.

Use the calendar view to see the full year. The Reminders calendar shows every scheduled recurring event across your portfolio. A properly set-up calendar shows you inspection months, service windows, contract renewal dates, survey cycles, and reporting deadlines all in one view.

Planned work is visible. Unplanned events land in a context where you already know what's coming and can respond without losing track of the routine.

The long-term value compounds. A property that has a condition report completed every six months for three years has six documented snapshots of its physical state. That record answers questions before they're asked. It supports warranty claims. It demonstrates due diligence to insurers. It shows clients that conditions are being actively monitored. And it gives you the factual basis to have productive conversations with vendors about work quality and recurring problems.

Reports are only as useful as the habit behind them. The Reminders system is how you turn that habit into infrastructure.

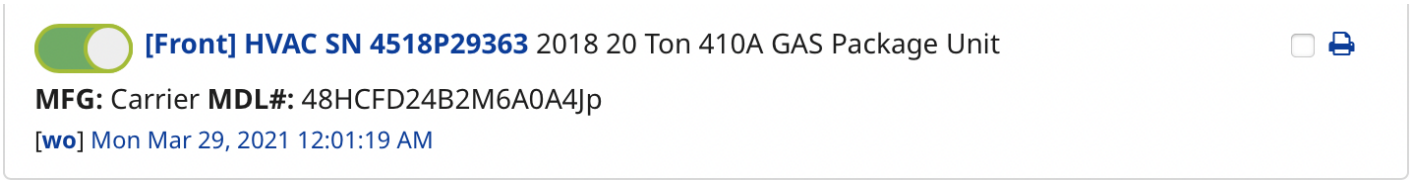
Parts: Create, Edit and Clone

Sytewise Parts are attached to Fixtures. A parts list is associated with fixtures. To create a new part:

1. Go the the Fixture that will have the part being created.
2. In the right column below the Fixture details and click "New Part"
3. Fill out the form and click "Save".

Parts have the following attributes.

- **A Part Number**: (Required, 60 characters) You can use a serial number or something descriptive. Both the Part Number and Description appear on the part list on the fixture page so descriptions can be confined to the description field
- **Description**: (Required) Here is where you give useful descriptive text like Fan Belt.
- **Installed Date**: (Required) Default: day the part was entered. You can change this to an earlier date if the part was installed at a different time.
- **Position**: (Optional, 12 characters) A short description of the location of the part on the fixture: "Front", "Left", "Top" or simply "A" works. This field sorts the parts list after Part Number and Description.
- **Model Number**: (Optional, 80 characters)
- **Warranty Expiration Date**: (Optional) If a warranty is applicable, enter the expiration date.
- **Warranty Description:** (Optional) Who services the warranty or other terms.
- **Table Details:** (Optional) use this field to create a table of additional data if needed. Each table row per line. Column breaks with commas.



Parts are either Status “On” or “Off”

Admins can change the status of any part simply by clicking the green or red toggle. Once you've changed the all the part statuses make sure to click "Save" at the top of the list.

Surveys and Work Orders can affect changes to parts statuses as well.

Cloning Parts

You can clone any part already created in your account. This may come in handy if you have redundant parts, especially ones with a lot of detail. Cloning parts places the cloned part within the original Fixture. To copy a part (or a select set of parts) into another fixture look into create a Library of that part (or parts) to reuse elsewhere.

To Clone a Part:

1. Navigate to the fixture where the part is going to be cloned.
2. In the listing of parts check the checkbox on the right side next to the print icon.
    1. You can only check one part to clone.
    2. To copy more than one part use the Library feature
3. Click "Clone" at the top of the Parts list.
4. Enter a position if necessary for this copy of the part.
5. Change the part number to help identify this part from the original. Alternately, position can serve as the differentiator.