

Reference: Terms & Concepts

Terms and concepts related to using the Sytewise platform.

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- Trades
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- Contracts
- Contacts
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Properties

Properties are one of the fundamental concepts of the Sytewise system. A Property can be an actual property that you manage, or it may just be an address of the location where you have an asset that you manage. It can be the location where you do contractual work or provide a service. Whatever it means to you and your company, Sytewise sees a Property as a location and that location is unchangeable once established in the system.

When you add a property to your Sytewise account you are establishing a physical location on the planet for any Trade you use within your account. HVAC, Plumbing, Asphalt, Doors, and Keys are just a few of the many Trades you can establish for a Property Location in your account.

Trades

A Trade is a type of work conducted on your property locations. It can be work conducted by your staff or outside Vendors. Establishing a Trade for a property allows you to do the following:

- Establish a location to store Work Orders and Information for Similar Types of Work. (HVAC, Plumbing, Roofing, etc..)
- Establish a default Vendor for Certain Types of Work at Certain Properties. (Who's our Plumber in TN? What's his number?)
- See all of a specific type of Fixtures on your Property in One Place.
- Quickly access trade specific notes about your properties. (Does the Landlord maintain the HVAC units or the Tenant?)

Below is a Property Header showing several Trades. Notice that the Keys Trade is Highlighted. The Preferred Vendor and Surveyor are listed just below the Property info. Your Client for this Property is listed along with any special notes. Moving from one Trade to another is as simple as clicking the Trade tab at the top of the Header.

DASHBOARD > Properties > 031 HSV Huntsville AL Huntsville West Plaza

5112 Property

Access Control CCTV Dock Doors Electrical Facilities Flooring Glass HVAC Intrusion Janitorial **Keys** Landscaping Life Safety

Lights Masonry Misc Pest Control Plumbing Restoration Roofing Safe Mgt Signage Solid Waste

+ Library

★ 031 HSV Huntsville AL Huntsville West Plaza
4710 University Dr STE O, Huntsville, AL 35816, USA
Prop Email: retail.huntsville@bargainhunt.com
Prop Phone: (256) 837-3342

Client

Select a different client.

Enter a note and hit return

2021-03-11 08:32 PM Charlotte Williams, user: Charlotte Williams
HVAC PM SCHEDULE: Feb (filters), May, Aug (filters), Nov - Coils
last cleaned Feb 2021

+ Survey + Contract + WOs

+ Vendor: Locktec, Inc.

+ Surveyor:

Fixtures

A fixture, in the Sytewise Property Asset Manager, is a fixed property asset that requires maintenance, repair or replacement. From the Property / Trade you wish to associate the fixture you can add fixtures in a few ways.

Fixtures status/total **4/5**

+ Fixture **+ Group** **Clone**

Add a fixture, Create A Group, Clone Checked

Group, Clone Checkbox

RTU1  	[17ft+] CARRIER PKG UNIT 4518P29363 [admin] Fri Apr 2, 2021 01:30:07 PM	<input type="checkbox"/>	0/1
RTU2	[17ft+] CARRIER PKG UNIT 4518P29361 [survey] Tue Mar 23, 2021 03:25:50 PM Last activity	<input type="checkbox"/>	1/1
RTU3	[17ft+] CARRIER PKG UNIT 4518P29362 [survey] Tue Mar 23, 2021 03:25:50 PM	<input type="checkbox"/>	1/1
RTU4	[17ft+] CARRIER PKG UNIT 4518P29359 [survey] Tue Mar 23, 2021 03:25:50 PM	<input type="checkbox"/>	1/1
RTU5  	[17ft+] TRANE SPLIT SYS unknown [wo] Tue Mar 23, 2021 04:05:00 PM	<input type="checkbox"/>	1/1

Import Fixtures **Import fixtures from CSV**

Add One Fixture

Click the + Fixture button at the top of the fixture list.

All the fields are required.

Adding a vendor works the same throughout Sytewise. Start typing the name of the vendor you wish to choose. Arrow down or click the name that appears in the list to select. Confirm by clicking the check, if present.

Adding multiple fixtures

Sytewise gives you the ability to add many fixtures at once to any Property / Trade. The software accepts CVS formatted files prepared in a specific column order. Clicking the "Import Fixtures" button shows a Modal window where you can choose the file to upload. In the modal there are specific instructions on how to format your CVS data. Files not formatted correctly can import fixtures that are incorrect.

Import Fixtures ✕

Select a CSV file to import

no file selected

Ignore first row header

A CSV file with these columns and in this order

★Required Value if left blank

- ★Fixture Title
- Fixture Description *Fixture Title*
- Total Parts in Fixture *1*
- Part No *Fixture Title*
- Part Description *Part Number*
- Part Position *NULL*
- Part Manufacturer *NULL*
- Part ModelNo *NULL*
- Fixture Height in ft *7*
- Latitude *Property Lat*
- Longitude *Property Lng*

Total Parts will create that number of parts with Part No and Description.

Check the preview table for any errors or misalignments before committing the import.

You can only import 50 fixtures at a time.

Parts

Parts are Where the Work Gets Done

Parts helps you track the components of your fixtures along with their repairs and updates. They are the pieces of your Fixtures that wear out, need adjustment, get updated, and generally need to be maintained.

Actions can be Parts, Too!

Parts are mostly seen as the physical components of your Fixtures. But don't limit the usefulness of the Sytewise platform to only the physical parts of the system. Actions can be listed as parts also if you have a need or want to track them. Take Annual Fire Panel inspections for example, or Routine Maintenance. If you add Routine Actions to your Fixture, you can select them as a part that needs repair on a Work Order and keep track of their dates of service.

Examples of Actions that can be listed as a Fixture Part could be:

- Quarterly Filter Changes on HVAC Units
- Inspecting your Fire Extinguishers
- Annual Inspection of Backflow and Sprinkler Systems

What are the Good Parts to Add to my Fixture?

Some Fixtures you may want to list all of the parts from the beginning. This can establish what type of equipment you have on site at a particular location. A Solid Waste Dumpster for Example, may have a lock on it, It may be in an enclosure, and that enclosure may have doors, or gates, or even a roof. Listing all of these items up front lets you easily access what type of equipment you have at that location.

Other Fixtures may be best served by only listing the parts that need and/or have been repaired. This can make it easy to see what work has been done on a Fixture and keep track of updated parts and warranty information. An HVAC unit is a good example of a Fixture with a lot of Parts. You may be tempted to add the Compressor part numbers and other common features that you want to track. The information can be helpful, but it can also make it less apparent what, if any

parts have been replaced.

A good rule of thumb on when to add a part to a Fixture, if a part is an element of structure that isn't likely to change, and you will need to be able to recall and track, make it a part. If a part is something that can be updated, like firmware, or changed when it wears out, like a compressor on an HVAC system, wait until you actually need to change it to add it to the Fixture. This allows you to see at a glance what the permanent elements of your Fixture are while quickly establishing which parts have been serviced or replaced.

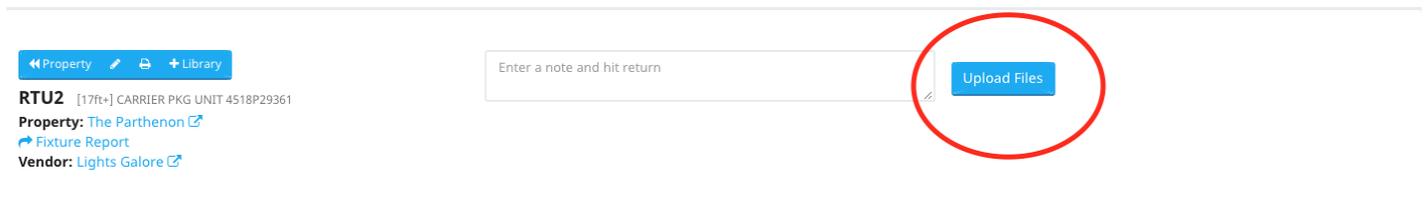
Clients

Clients are the people or entities that own the properties or locations that you manage with Sytewise. Clients will be part of the contracts you create and can be associated with all or just some of the properties you manage.

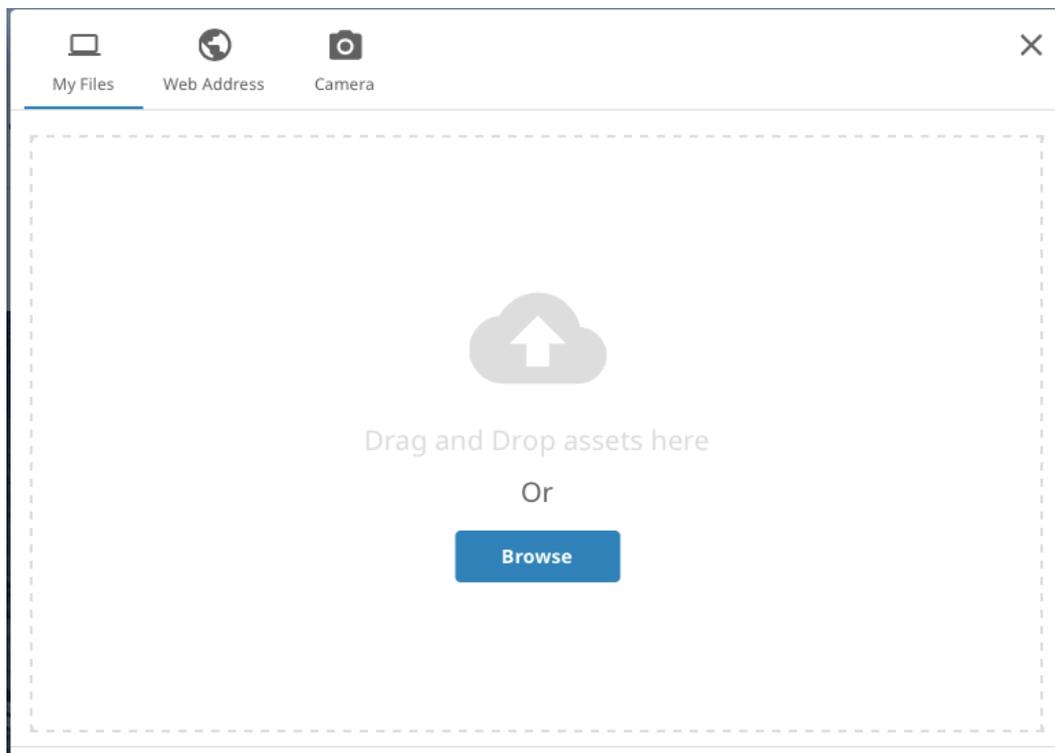
Adding Photos to Fixtures

Fixtures are any fixed property asset that requires maintenance or repair. Fixtures are located within a [Property / Trade](#) that is managed by the Sytewise Management Platform. All fixtures have a GPS location or a coordinate location on a floorpan.

To add a photo to a fixture you need to be on the fixture page and click the "Upload Files" button in the right side of the Fixture Page Header.



This will open a Modal window on screen that allows you to drag and drop up to 10 files. You can also use the browse button to find files on your computer to upload. Here is the upload window.



You can choose to add files from a web URL or your computer's camera.

You can only upload image files that are PNG, GIF, or JPG and PDF files. Images of any dimension larger than 400 x 400 pixels can be uploaded as long as they are less than 10MB in size.

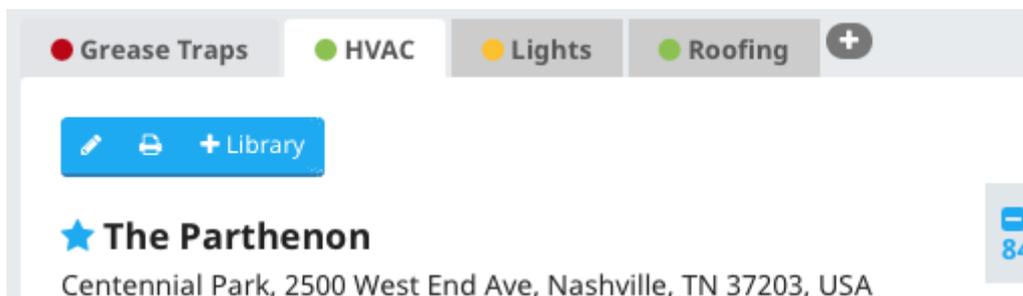
Work Orders

A work order is an action request for a trade vendor to complete work on a fixture related to a property.

Why Property / Trade?

The Sytewise Property Management System is **property** centric, meaning all activity recorded and stored is associated with a property. Properties can have multiple **Trades**. These trades represent the industries that install, maintain, repair and replace the fixtures on each property.

For example, a property may have several trades: Grease Traps, Lights, and Roofing; just to name a few. Each trade has it's subset of **Fixtures**, **Contracts**, Insurance, Preferred **Vendors** and associated **Work Orders**.



Depending on your Sytewise account profile the trades available to you may differ from those in the example above.

Adding a trade is as simple as clicking the [+] icon next to the trade tabs, selecting the new trade (if any are available to your account) and choosing a vendor. The default vendor for the property is already chosen for you.

Add Trade Tab



Trade

Miscellaneous

Vendor

Lights Galore

To change vendor start typing new vendor name and select

Close

Save

Roofing



, TN 37203, USA

Survey

A survey is an action request for a Surveyor to look at and document the status of fixtures on a property.

Tenants

Tenants are those that occupy the properties and spaces that you manage. They can be your actual tenants if you manage multi family properties or commercial shopping centers. They can also be the GM's of your local stores if you manage real estate for a multi-site commercial entity.

Users

Users is anyone that uses the Administration portal of the software. The can be a property manager or a project manager. Anyone that has log in credentials to view or add data in the system. A super-user can create other users in the system.

Contracts

Contracts are agreements between Clients, Vendors, and Properties. Contracts keep your scheduled work on track and terms of the agreement available to you, no matter where you are.

Contacts

Contacts are people associated with Vendors, Clients, or Properties. Keeping their contact information with you at all times in the context of their company or property is very useful, and in an emergency can keep an emergency from turning into a disaster.

The Property Information Funnel

Designed for Work and Designed for Data

The Sytewise platform is designed to help you gather the information you need to make good sense spending and business decisions as you go about the process of managing the maintenance and care of your assets. The data is literally the passive byproduct of working in a system designed to harvest meaningful information as a dividend on the day to day labor of asset maintenance.

Everyday as you create work orders, survey systems or components, or schedule inspections you are planting useful information into the system that can be used to make decisions from a very narrow perspective, and also light up trends across your entire portfolio.

So with that introduction, here is what the Sytewise Data Funnel looks like and where you can reach in and harness the information that will make your assets more profitable and your relationships with owners and vendors much more lucrative. For the purpose of this graphic the assets are properties, but if you can see it, Sytewise can handle it.

Hopefully you have as many **Clients** as you want. Each of them can have several **Properties**. Every property will employ **Vendors** of several trades. Every **Trade** will have several **Fixtures** on each **Property**. And finally each **Fixture** is composed of its several **Parts**.

At each point we have people who need information and can give us information about our Assets.

Clients need information about their Properties

Vendors need information about the Property, The Fixture and The Parts

Your Tenants Have Helpful Information about your Property and need information about the Work of Vendors.

Clients
Properties
Trades

Sytewise is the place to store everything with a savvy interface to perform your daily tasks and harvest the intel when you need it.

WO, Survey Email Preferences

When you create a [Work Order](#) or [Survey](#), you have an option to send the vendor or surveyor an email of the order. This email has a link to the work to be done. Once The Survey or Work Order is complete, either work finished or rejected in the case of Work Orders, the status of that order is updated in the system along with all the fixtures, parts and properties are updated.

But what if you want to be notified of that completion? You can set email preferences for each Sytewise user that dictate when they are sent a message of the update.

To Set Your Global Email Preferences for Work Order or Survey Notification

Global settings are for every instance of a Work Order or Survey. For settings specific to any one property see below.

1. Go to the user's page you wish to setup Users > User
2. Under the section Global Email Preferences check your choices
 1. **Receive All Work Order Responses** - You will receive all Work Order submissions from vendors, no matter the property.
 2. **Receive All Work Order Rejections** - You will only receive Work Orders vendors reject.
 3. **Receive All Survey Responses** - Every survey submitted for any of your properties will be sent to your email address.
3. Click Save to keep your choices.

Global Email Preferences

Set your preference for when a [Survey](#) or [Work Order](#) is submitted.

- Receive All Work Order Responses (including Rejections).
- Receive All Work Order Rejections.
- Receive All Survey Responses.

Save

Set email preferences for individual properties within the favorite properties below.

To Set Your Email Preference for Individual Properties

1. You must create favorite properties to add email notices to.
 1. To add a property to your favorites
 1. start typing the name of the property in the text box provided.
 2. Select the property from the list of search results (be sure to spell it correctly)
 3. Hit return.
2. Any favorite property can have Work Orders or Survey responses sent to you.
3. If you have set WOs or Surveys to be globally sent you cannot add individual properties to your email preference.

 **69 100 Taylor** 
100 Taylor St Nashville TN 37208

Grease Traps **HVAC**

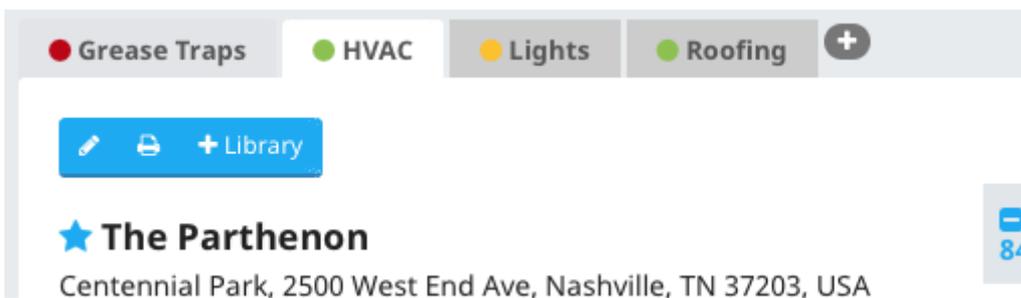
- Receive WO Responses.
- Receive Survey Responses.

Favorite Properties

Your Dashboard and Properties pages in the Sytewise Admin show a list of your favorite properties. This is a convenient list for quick reference. Otherwise you can search for properties by name, by state, or by other user's favorites at the top of the property list.

To make a property your favorite

1. Find the property you want to make your favorite and go to the property page.
2. Find the star to the left of the property name
3. Click the star.



Make a property your favorite from your User page.

1. Go to your user page
2. Find the list of favorite properties on the right.
3. Start typing the name of the property in the search box
4. Select with your arrow keys of your mouse the property you wish to add.
5. Hit return.

Favorite Properties

Chattanooga Choo Choo - 1400 Market St, Chattanooga, TN

Chattanooga Choo Choo - 1400 Market St, Chattanooga, TN



68 **Austin Peay University** 

601 College St Clarksville, TN 37044

HVAC

Lights