

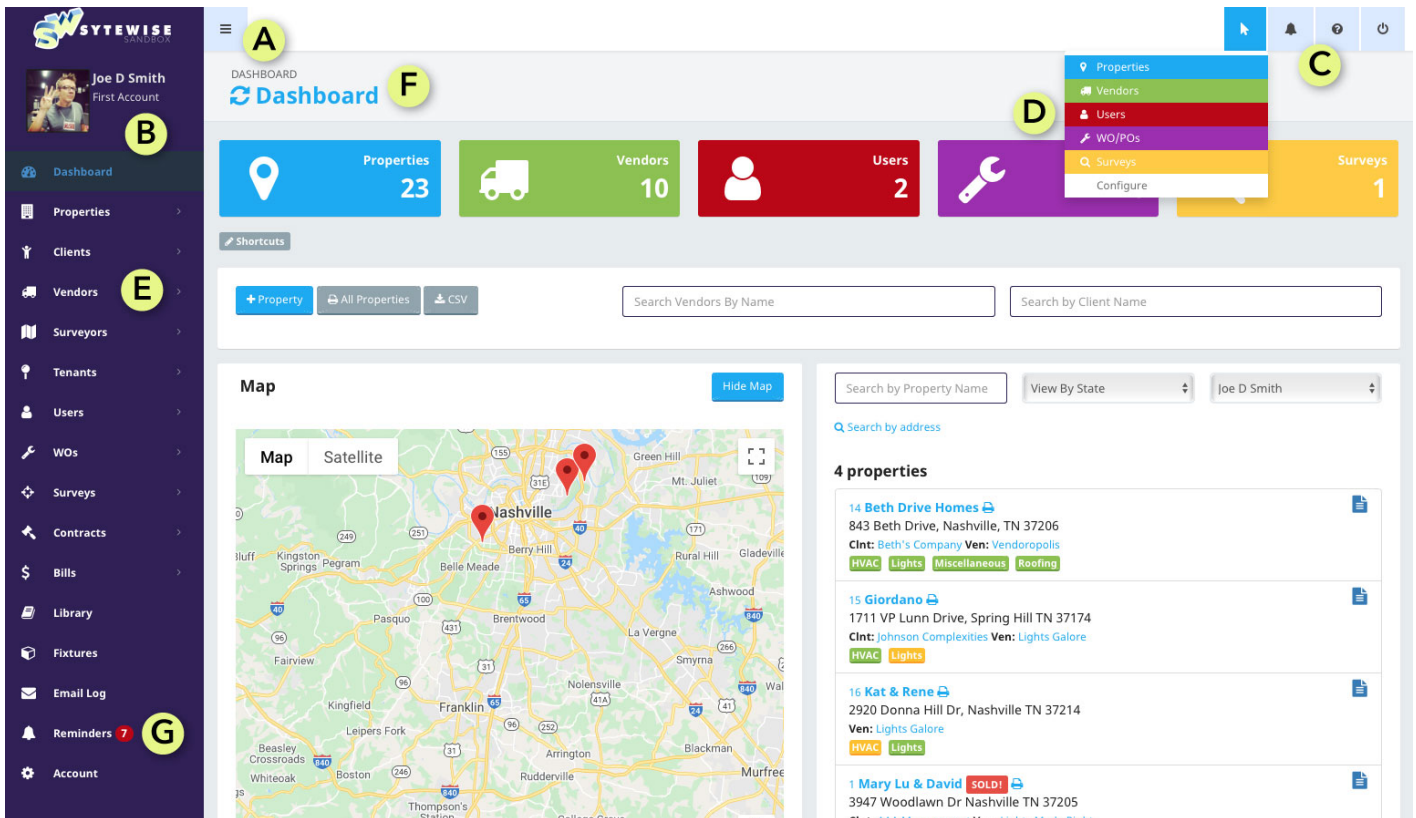
# Reference: The Sytewise User Interface

A rundown of the Sytewise user interface from the main admin screen through the menus and pages.

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# Interface parts

## The Sytewise User Interface



Once you are logged in the Sytewise interface will have the following components always available to you.

### A. Menu Collapse

Click this "hamburger" icon to the right of the Sytewise Logo to collapse the main menu bar to the left. This is convenient when you need more screen real estate in the main window area.

### B. Account Block

At the top of the main menu bar on the left is your account block. This area contains the Photo you uploaded for your user profile (the username and password you logged in with). Clicking the Username or the Photo takes you to your user profile page. If you have super user privileges you can click the Account name under the user's name to go to the account settings.

## C. Quick Tools Navigation

At the upper right of the top of every page you will find a series of 4 icons. These are quick links to useful tools in the Sytewise system.

- **Shortcuts Arrow:** Clicking this opens a dropdown with quick links to the shortcuts
- **Reminder Bell:** This drops down the reminder tool. Reminders are one-time or recurring events that remind you on a particular day to do something in Sytewise. Reminders can be attached to many of the items within Sytewise. Just go to that page and start making a reminder.
- **Help Icon:** Clicking this question mark icon takes you to the Sytewise help site. (this site)
- **Logout Icon:** Clicking this icon will log you out of Sytewise. You are automatically logged out after an hour.

## D. Shortcuts

You can set shortcuts for yourself in your user profile. They are in the shortcut quick tools dropdown and are shown on your dashboard (as seen in the image above).

## E. Main Menu Navigation

On the left of the screen in the dark band is the Main Menu. Here are links to every section within the system and their details. Some links have more detail pages in them and require one click to reveal those detail pages. Properties > New Property, Properties > Property Search for example.

## F. Page Header

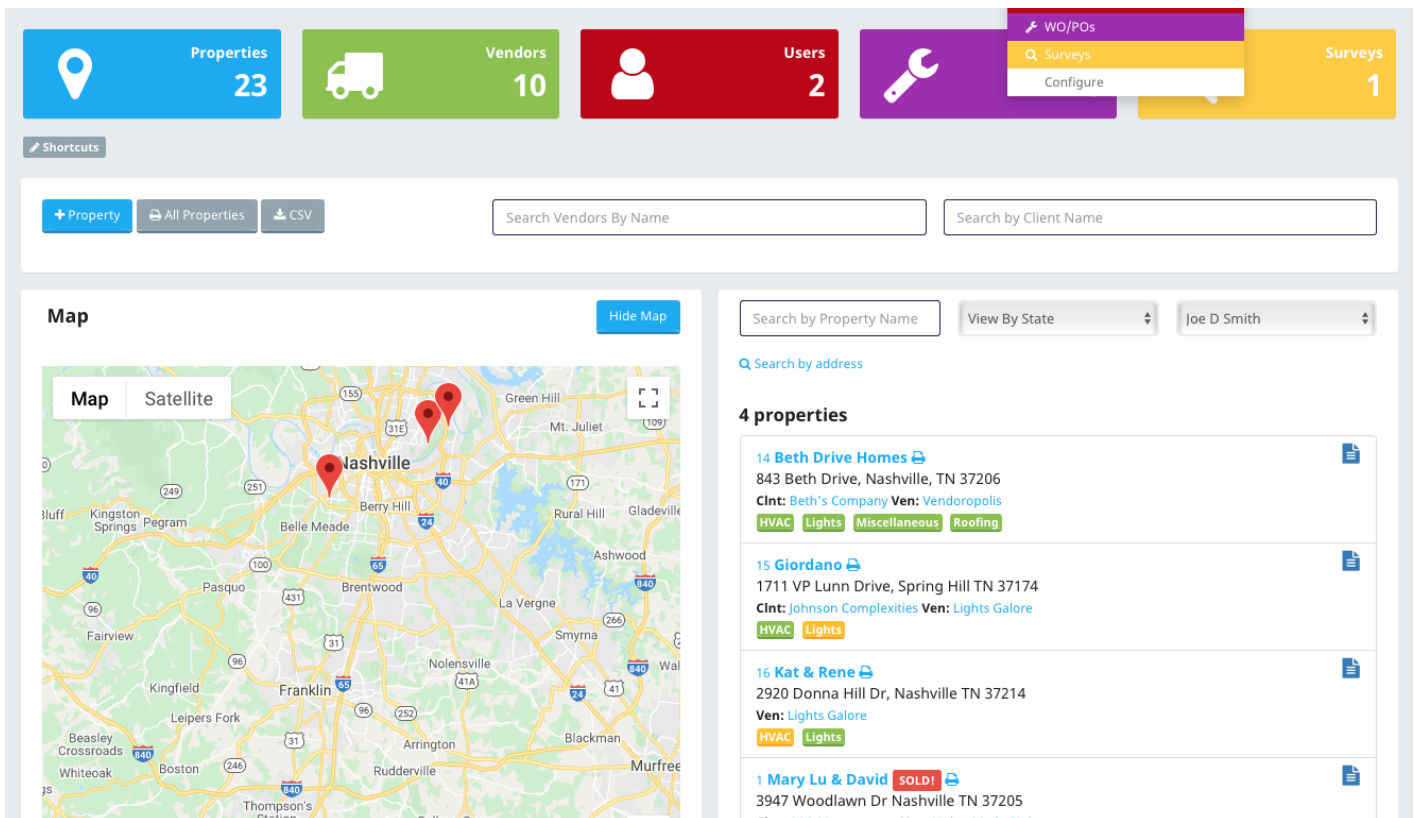
Each page has a header with a breadcrumb for knowing the context of your current page, a page title and a refresh icon. You can click any of the upward links in the breadcrumb to go back to that page. The refresh Icon is helpful if you need to start your entries.

## G. Reminders Indicator

Next to the Reminders Main Menu item there will occur a number in a red circle. This is the un-attended-to reminders number. If this number appears (it will not if there are zero reminders to attend), you can click "Reminders" in the Main Menu to see what is in your reminders queue.

# The Dashboard

The initial page once you log in is your property management dashboard.



## Shortcuts

The top contains your shortcuts. These are summary color blocks that are also links to important sections of the Sytewise system.

### To edit your shortcuts

- Go to your user profile page by clicking your photo
- Or click the shortcuts button below the blocks
- Or click the "Configure" item in the shortcuts dropdown
  - Find the shortcuts section and select up to 5 by checking the checkbox next to the

shortcut.

# Special Dashboard Tools

Just below the shortcuts is a set of buttons and search boxes that have particular functions. These choices are changing as Sytewise continues to improve it's toolset but the basics will remain the same.

## Creating a new property

You can create a new property from the Main Menu on the left at anytime. Go to Properties > New Property. The dashboard and property pages also have a one click button that take you to the new property page.

## Printing and Downloading All Properties

Sytewise lets users maintain a "Favorite Properties" list that is what is displayed in the Properties Summary on the dashboard and properties page. If you want to print or download a CSV of all the properties in the account click the associated button.

## Quick Searches

On the dashboard there are quick search fields for going straight to a vendor or client profile page. Simply start typing the name of a vendor or client in the field, select the name from the list (arrow keys or with your mouse) and hit return. This will take you to the appropriate page.

# Property Summary Map and List

The main part of the dashboard and property pages is the map and list of your favorite properties. You can add favorite properties in your User Profile or by visiting a property page and click the star next to the property name.

Clicking on a map marker reveals the property name (as a link to that property) and highlights the property in the list to the right. You can scale and move the map around with your mouse. You can also switch views and even go to street level view in every map on Sytewise. Sytewise maps are generated from Googles maps interface and will reflect their user interface and data.

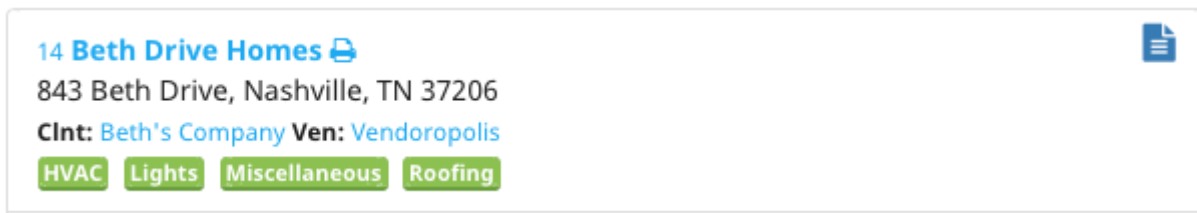
## Search by Name

Clicking in the "Search by Property Name" field and start typing will dropdown a list of properties in your account that match by name. Clicking (or using the arrow keys) to a name in the list and hitting return will go to that property page.

## Narrowing or Expanding the Summary List

The list of properties (and their corresponding map locations) can be changed using the View By State and User dropdown choices. Simply choose any of the options in the lists and the list changes to only include those. Choosing a state will show all the properties located in that state. Choose a user will show you that user's favorite properties. This can be useful for management to check on the status of an employee's properties.

# The Property List



**The Property Name Line** has the Sytewise internal property ID first, then the given name for the property. Clicking either of these will take you to the first created trade for that property. Finally, there is a printer icon which takes you to that property's printable page. The address is always on the second line.

**Client and Vendors Line** lists the client (which is for every trade on this property) and the default vendor for the first trade created for the property. To see who the vendor is for each trade go to the trade for that property.

**Blue Contract Icon** to the left allows you to reveal any contracts for the property. Clicking it will load a list of contracts under the property trades.

**Property Trades** are listed under the client and vendor line. Clicking "Load Trade Statuses" will change the color of each trade button on the list to the current status of that trade. Green: all fixtures in good order. Yellow: at least one fixture is out of order. Red: all fixtures and parts in that

trade are in need of attention.



# Property Page (part 1)

The property page in the Sytewise system is the central hub for all things property management. The page contains all pertinent information about a property with direct links to everything you need to know, if it isn't already represented on the page. There is, in fact so much to cover on the property page we created two pages just for the overview. Reminder: more detailed information about the [use](#) and [best practice](#) of Sytewise is contained in other chapters on this help site.

[Read about the bottom half of the property page.](#)



FYI Anytime you see this icon clicking it expands more information related to the title next to this button.

DASHBOARD > Properties > Beth Drive Homes

**14 Property**

HVAC
Lights
Miscellaneous
Roofing
+

Edit
Print
Library

**★ Beth Drive Homes**  
 843 Beth Drive, Nashville, TN 37206  
 SqFt: 1680  
 No. Units: 1  
 Region: South Eastern USA

**Client:** Beth's Company  
 805 Rodney Dr. Nashville TN 37205

Enter a note and hit return

2019-02-28 11:40 PM Jeff Thornhill  
 This. Ote

**Vendor:** Lights Galore

**Surveyor:** A Surveyor

**1 Contract**

**5148 Beth Drive Homes-HVAC Contract**
Contract

Jun 24, 2021 to Jun 24, 2022
 Client: Beth's Company
Vendor: Lights Galore
30% Percent: \$0.00

**Map** Upload Floorplan

All
0-7ft

Map
Satellite

Google

Keyboard shortcuts | Imagery ©2021, Maxar Technologies | Terms of Use | Report a map error.

**Fixtures** 3/4

+ Fixture
+ Group
Clone
Delete
Show: All

Laker HVAC
[0-7ft] Goodman
V: Lights Galore
[admin] Thu Jun 24, 2021 11:11:16 AM
0/1

Moving This
[0-7ft] 200lb
V: Lights Galore
[survey] Mon Mar 22, 2021 12:26:14 PM
2/2

Pinkston Home HVAC
[0-7ft] Goodman
V: Lights Galore
[wo] Mon Mar 22, 2021 06:34:48 PM
1/1

Smith Home HVAC
[0-7ft] Goodman HVAC installed 2010. Serial Number KLD:FHUNDUOHUBEUBDUDHFDKLDJHFDH This is for testing the length of the description.
V: Lights Galore
[wo] Mon Mar 22, 2021 06:34:48 PM
1/1
replaced

Import Fixtures
Inherit Property Vendor

## A. Trade Tabs

Each property has at least one trade. Your account has a set number of trades it can create, contact Sytewise to add or change that list of available trades. Adding a trade is as simple as clicking the "+" button at the far right of the trade tabs.

Switch between trades by clicking the tab. The colored dot indicates the status of that trade's fixtures. Green: all good. Yellow: at least one issue. Red: all parts and fixtures have issues.

## B. Property Settings

The left third of the property info section is for specifics about the whole property, including any trades. Clicking the "Edit" button will open a form to change these settings.

**NOTE:** The property address is not editable. It was set when the property was created in Sytewise and is based on Geolocation technology for properly formatted addresses. It also includes the specific GPS location of the property marker.

## C. Property Client

Each property can optionally be assigned a client. To see the client's contacts and other information expand the information box by clicking the "+" next to the client name.

## D. Add Buttons

On the top right side of the property info section you will find a group of buttons for creating new Work Orders, Contracts and Surveys.

The download icon will download all the fixture data in a CSV format.

## E. Notes

The right side of the property info section includes a notes tool. Simply type a note in the field and hit return to create a new note. Clicking the red "X" will delete the note. Clicking the blue thumbtack will pin the note to the top of all notes.

Each note is timestamped and indicates the username who created it.

## F. Vendor Section

The vendor for the selected trade is listed in the title with a link to that vendor's page. Clicking the "+" button shows the vendor's contact details including any staff or other contacts you've created for that vendor.

To change vendors for the selected trade you can select a vendor by name or by distance from the property. Selected vendors are chosen when creating work orders or contracts for the selected trade.

- **Select a vendor by name**

- Starting typing a vendor's name in the vendor name field. From the list of found vendors click or arrow-key to the name and hit return.
- This will change the vendor for the selected trade.

- **Select a vendor by distance**

- Choose a distance from the dropdown list of distances and click "Find".
- This will produce a list of vendors within the distance selected sorted closest to furthest
- Click the "Select" button next to your vendor of choice to change the vendor for the selected trade.

**Alternate vendors** can be added to a trade. This is useful if your trade vendor is not available for particular work orders. Add alternate vendors the same way you select the primary vendor by name.

## G. Surveyor Section

Surveys are a way of evaluating your properties with a visit from a particular type of vendor or employee. They are given a portal in which they can evaluate the status of your fixtures and parts and report on them directly into the Sytewise system.

Selecting a Surveyor works exactly like selecting a vendor by name but from your list of surveyors.

## H. Contracts Section

This section gives a summary of any contracts associated with the property / trade. It includes links to related vendors, clients and the contract itself. Clicking the "+" next to the contract name reveals more details about the contract. A contract with a gray background has expired.

## I. Fixture Map Section

Sytewise enables you to show fixtures for any Property / Trade on a GPS map or overlaid on a floorpan. By default fixtures are placed on the GPS map, and when you create a new fixture it is placed in the same GPS location as the property.

**Custom markers** indicate the fixture position on the map or floorpan. Yellow markers are for fixtures at ground level up to 7ft. Blue are from 8 to 16ft and Red and 17ft and higher.




**To use a floorpan instead of the GPS map** you click "Upload Floorpan". Follow the on screen instruction to upload an image. A floorpan must be at least 790 pixels and no more than 2200 pixels in either dimension. Once uploaded any existing markers will be placed in the upper left corner of the floorpan.

A Floorpan can be converted back to GPS, you will lose any marker position data if you do so.

The GPS map is embedded from Google's mapping API and operates like a typical interactive map with size, scroll, satellite and street views.

## J. Fixtures List Section

The list of fixtures for the selected trade includes a lot of useful at-a-glance information and functions.

 **Household HVAC**  

☐ 1/2

[0-7ft] Goodman

V: [Multitasker LLC](#)

[admin] Thu Jun 24, 2021 12:10:01 PM

**Status and Name:** The colored dot indicates the fixture's status. Green: all parts good, Yellow, At least one part needs service, Red: all parts need service. See the gray numeric indicator to the right for the total good parts / total parts in the fixture. Clicking the name or the status dot takes you to the fixture page.

**Note and Image Icons** will appear to the right of the name if there is either of those associated with the fixture. Mousing over the note icon will summarize the most recent note.

**[Height group]** The fixture's height group is indicated in the brackets.

**The Vendor** for the fixture is indicated after "V:". and is a link to that vendor. A fixture can have an independently assigned vendor, otherwise it is assigned the default vendor for its Property / Trade.

If you set a separate vendor for a fixture and then go back to the Property / Trade and change default vendor this will change the specific vendor for each fixture.

The last line of the fixture listing is the most recent activity on that fixture as a one line log.

[Read more about the property page.](#)

# Property Page (part 2)

The bottom half of the property page includes related information and links related to the selected Property / Trade. This article covers these parts of the property page. [Read more about the top portion of the property page.](#)

The property page includes a Tenants Section, A Work Orders Section, A Surveys Section and a section for Files and Insurance.

Tenants

Pinkston Family Unit: 845

+ Memo

Lakers Unit: 841

+ Memo

+ Tenant

Import

Work / Purchase Orders

CSV

NO	DATE	PROPERTY	SUBJECT	VENDORS	DUE/COMP	ACCNO	TOTAL
33693	Mar 22, 2021	Beth Drive Homes WO	Beth Drive Homes WO	Lights Galore Main Office	Mar 22, 2021		\$0.00
33686	Mar 19, 2021	Beth Drive Homes WO	Beth Drive Homes WO	Lights Galore Main Office	Mar 22, 2021		\$0.00
124	Feb 5, 2018	Beth Drive Homes WO	Joe's HVAC thing	Lights Galore Main Office	Mar 22, 2021		\$0.00

Surveys

CSV

ID	SURVEY	PROPERTY	SURVEYOR	DATE	DUE/COMP
149	Beth Drive Homes Survey	Beth Drive Homes	A Surveyor	Mar 22, 2021	Mar 22, 2021
145	Beth Drive Homes Survey	Beth Drive Homes	A Surveyor	Mar 19, 2021	Mar 19, 2021

Files and Insurance

Proeprty Insurance AXB9954939

☒ Insurance Policy?

Jun 24, 2021 - Jun 24, 2023

Policy #

Delete


Add File or Policy

# The Tenants Section



Each Sytewise property can have a number of tenants. They are trade independent so they are available no matter what trade you select. A tenant portal is available for tenants to respond to memos and send messages to admins.



ABC Business Unit: 845

 + Memo

Retail Store #2 Unit: 841

  + Memo

Spring Maintenance Reminder


*Please have your HVAC services. Let us know when this is complete.*

2021-06-24 12:53:51

Fixtures: Household HVAC

add to fixture

+ Tenant

 Import

Sytewise's tenant portal is a way to communicate with tenants in a convenient way that associates property and fixture information from the Sytewise Property / Trade specifically.

## To create a memo

Click the "+Memo" button. In the popup window you can set a subject (which will be the email subject as well), a message and select fixtures to include in the memo from the fixture list. This sends the tenant a memo email with a link to the tenant portal. You can view any memos and their responses clicking the chat icon.

Once a memo has been created and it is associated with a fixture clicking the "Add to Fixture" button adds a note and any images in the memo to the associated fixture.

## To add a tenant

Click the "+Tenant" button and fill out the popup form. If you want tenants to access the Tenant Portal create a username and password.

Once you have tenants you can click their name to go to their profile page and edit their information.

Clicking the envelope icon opens your email client with a new message to the tenant.

## Work Orders and Surveys Section

All Work Orders and Surveys are listed in their respective sections. These are sorted by date with most recent at the top. A white background listing is active but incomplete. Green is completed and red is past due.

Clicking the number, date or title of the Work Order or Survey takes you to their respective details. You can also go directly to vendor's or surveyor's page from the list.

## Files and Insurance

At the bottom of a Property / Trade page, as well as several other contexts within Sytewise, you can upload files. These files can be image (gif, jpg or png) or PDF files.



### Mega Insurance



Insurance Policy?

*Feb 17, 2021 - Feb 17, 2022*

**Policy #** 123455678890

Fred Mega (615) 333-1111

---

Once you've uploaded a file you can designate that file as an insurance policy. Doing so will add the insurance effective dates and policy specific information. Expired policies are indicated with a red background.

# Fixture Page

Fixtures are where Sytewise's power comes in full display. A property manager manages fixed assets (Fixtures) and their detailed parts by entering critical information for fixtures and the maintainable parts of any fixture. Simply as a reference this is a substantial resource. But when coupled with Sytewise's Work Orders not only do you have reference you have history and performance.

## The Fixture Page Sections

DASHBOARD > Properties > 310 Central Avenue > York Roof Unit

378 Fixture

Property

Edit

Print

Library

York Roof Unit

[0-7ft] 200lb

Property: 310 Central Avenue

Fixture Report

Vendor: Vendoropolis

Enter a note and hit return

Upload Files

Fixture Map

Hide Map

Fixture LatLng (move icon to change)

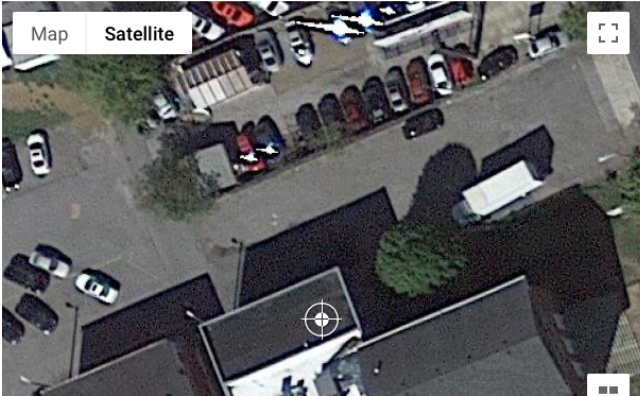
36.114723,-86.747787

Save

Set To Current Location

Map

Satellite



Parts in Fixture

Save

New Part

Clone Part

[Internal] Compressor

Rotary Compressor

MDL#: COMP123

[admin] Fri Apr 27, 2018 11:42:59 AM

[Internal] 62-23599-05 Control Board

Control Board

MF#: RUUD MDL#: 62-23599-05

[admin] Thu Jun 24, 2021 03:08:41 PM

[Top] 1580W 220V 50Hz Centrifugal Blower Fan

Blower

MF#: Carrier MDL#: 1580W220V50H

[admin] Thu Jun 24, 2021 03:00:14 PM

## Fixture Details Section

## Fixture Details

This section includes editable detail fields for your fixture including the title, description, installation notes and the default vendor among other characteristics.

The middle portion is for notes.

Enter a note and hit return to save it. You can delete or pin saved notes.

The right portion is for uploaded files.

You can upload images (gif, jpg, and png) and PDF files. When you've uploaded a file a thumbnail appears. Clicking the middle of the thumbnail opens images in a popover modal with the original filename at the bottom. Clicking a PDF opens the file in a new browser window from which you can save the file to your local computer.

Click the "Heart" icon in the upper right of any thumbnail to make it the primary image that shows up on the printed summary of the fixture and places it as the first file in the thumbnail grid of files.

## Fixture Map

The Fixture Map is where the map or floorplan marker is located in context. Fixtures are on either GPS or Floorplan maps.

### For GPS Property / Trades Markers

The marker is located by GPS coordinates. The fixture selected will be the larger marker in the center of the map. To relocate the marker click and drag the marker to it's new location. If you have trouble grabbing the marker place your mouse over it's edge and wait a couple seconds. If a "Move Me" label appears, move the marker to your desired location on the map.

Once the marker is at the desired location find the red "Save" button above the map. It will show the new coordinates of your marker. Click save.

### For Floor Plan Markers







When the Property / Trade has an uploaded Floor Plan you can move and save the markers in the same way. Just find the larger marker and click and drag it. (The other, smaller makers are not

"draggable). Make sure you save the new location before leaving the page.

# The Parts List

## Parts in Fixture

Save New Part Clone Part

	<b>[Internal] Compressor</b> Rotary Compressor		
<b>MDL#:</b> COMP123			
<b>[admin]</b> Fri Apr 27, 2018 11:42:59 AM			
	<b>[Internal] 62-23599-05 Control Board</b> Control Board		
<b>MFG:</b> RUUD <b>MDL#:</b> 62-23599-05			
<b>[admin]</b> Thu Jun 24, 2021 03:08:41 PM			

The parts list is an at a glance view of all the parts in a fixture with tools for managing the list.

Each part lists a summary of the data for that part including

- **[The Position]** in brackets. Position is a short text field that let's you reference how to differentiate similar parts. Uses include "Top", "Southwest", "A", "Internal" etc.
- **Part Number** is the next field, or the name of the part. Both position and Partno are links to open the detail part editor.
- **Description** is on the end of the first line.
- **Manufacturer and Model Number** are on the second line.
- **Recent Activity** is on the bottom

## Managing, Editing Parts

### Status Change

A part can have one of two status's. On or Off. "Good" or "Bad", "In Service" or "Out of Service".

You can change this status by clicking the Red or Green status toggle and clicking the "Save" button above the list. This will be logged as an Admin change to the status of that part and fixture status.

Surveys and Work Orders are the most common way part status's get changed although an admin has the authority to make those changes within the Sytewise master system.

## To Clone A Part

- Select the part to clone by checking the radio choice on the right side of the part listed. It's to the left of the print icon.
- Click "Clone Part" at the top of the list to open the clone part modal window.
- Give it a Position and a new part number if necessary.
- Save.
- This will create an exact clone of the part with all the details.
- Open the new part to edit any differences.

To Delete A Part, open the edit modal and click "Delete This Part"

## Part Details

If the fields made available to you in the parts details are not enough for the information you wish to add to your parts, Sytewise gives you a simple tool for adding a table of data for your parts.

 2021-06-24

format yyyy-mm-dd

#### Table Details

Label,Value,Units  
Output,65,Watts  
Input,12,Ohms

Comma separated values on each line to table

CloseSave

Delete This Part

LABEL		VALUE
Label	Value	Units
Output	65	Watts
Input	12	Ohms

To add a detail table to a part do the following:

- Open a part detail editor by clicking the part name or position
- Find the field labeled "Table Details"
- Enter comma separated text to the field.
  - For example enter: Label, Value, Units for three columns
  - Add a line break (return) to start a new row and enter the same number of comma separated values.
- To preview your table click outside the edit field or tab to escape the field.
  - The new table will appear below the buttons.
  - Feel free to make changes and click out of the field to continue editing
- Once you are done adding your table don't forget to click "Save"

# Creating A Work Order

Sytewise' is a Work Order platform at its heart. This is where the hard work of your property, trade, fixture, part, client, vendor, contract and historical data come to play. Work Orders are easy to create, manage and track. Plus the Sytewise Vendor Portal is a power and convenient way for vendors to record their work. This is the first of a series of articles on Work Orders. Here we will outline the creation of Work Orders from the Property / Trade page.

## Creating a Work Order in Sytewise



From a Property / Trade page you will click the "+WOs" in the top right of the Property Info Section. The New Work Order Modal window will appear and it will look something like this:



## Create A New WOs



☒ Status: Complete (will not become overdue). **A**

Subject / Title

Order Date  
 **B**

Due Date

Vendor   
 **E**

Select a Contract   
 **G**

**Costs** optional  
Reference No.  
 **H**

Labor	85.00			
Parts	167.45			
Total		<input type="text" value="252.45"/> <b>I</b>		

Select Fixtures  
Already in a WO

Every ☒ None

<input checked="" type="checkbox"/> 20 Ton HVAC Roof unit, main	<input type="checkbox"/> 4/4
<input checked="" type="checkbox"/> Roof 10 Ton Unit 1 Roof HVAC unit	<input type="checkbox"/> 3/3
<input checked="" type="checkbox"/> Roof 10 Ton Unit 3 Roof HVAC unit	<input checked="" type="checkbox"/> 0/3

Special Instructions / Description  

**D**

Select contact to receive the work order.  

<input type="checkbox"/>	<b>F</b>
<input type="checkbox"/>	

# Parts of the New Work Order Modal

## A. Status Complete

Checking this box will create the work order but will set the status as complete. The due date will be moot as the completion will be at the time of creation. This is helpful if a property manager knows the work is complete and doesn't want to have the Work Order decay in the system.

## B. Subject and Dates

**The Subject of the Work Order** is its title and will be referenced as such in the system, but it will also be the Subject in the email(s) sent to vendors and the responses to administrators.

**A Note about Notifications:** Sending Work Orders to vendors via email occurs when you create it, but you can also send the Work Order after it is created. Simply go to the Work Order and re-send.

**You must set your notification preferences** in your user's profile to receive notification of a completed Work Order or Survey.

**Order Date and Due Date** help manage vendor work and system logs. Past due Work Orders are listed in the system with a red background.

## C. Fixture Selection

Any fixture with a non-green status is automatically selected to be in a new Work Order. To choose other fixtures in the Property / Trade click the **every** button to load and select all. You can then use the check marks associated with each fixture to include or not include in the work order.

## D. Special Instructions

You can add a text note to the Work Order for the vendor to read. Use this field to add any instructions that aren't obvious from the property location and the fixtures included. This text shows up in the emails as well as the Vendor Portal.

## E. Vendor Selection

**The Property / Trade vendor** is automatically populated as the Vendor choice for a new Work Order. To change that simply start typing a vendor name in the text field, click or arrow to the vendor name in the list to select that vendor. This choice will only effect the current Work Order and not the Property / Trade or fixtures.


## F. Email Checkboxes

To have the new Work Order sent to the vendor check the boxes next to their email addresses. These email addresses are captured from the vendor profile. It is the main contact email address for the vendor and any contacts within that vendor that have email addresses. If you see no email choices you may want to go to the vendor profile and add one.

Changing vendors for a new Work Order will change the choices of email addresses available.

## Costs, Accounts and Contracts

Here is a portion of the screenshot above that deals with Work Order costs.

Select a Contract 







The West End-HVAC Contract Jun 25 2022 G

**Costs** optional

Reference No.

Account Number H

+ Add Line Item

Labor	85.00   
Parts <span>I</span>	167.45   

Total

252.45

## G. Select A Contract

If the selected Property / Trade has any contracts associated they will appear in this dropdown menu. The most recent and active contract will be chosen if you there are more than one.

When a contract exists the expected costs and account number are automatically inserted into the Work Order. If you change contracts those numbers will change again.

## H. Account Number

If you have a reference or account number to enter for the vendor to see in their Work Order enter it here. Account numbers from contracts are inherited. Vendors can change account number when submitting the Work Order. If they do so a note is added to the Work Order and in your notification.

## I. Costs

You can enter an expected cost and even add line items to a Work Order. This will enable the vendor to see the costs when doing the work. Vendors can change costs when submitting the Work Order. If they do so a note is added to the Work Order and in your notification.

# Work Orders in the Vendor Portal

Sytewise offers a Vendor Portal to all accounts where vendors can interact with Work Orders and their account information. When you create a vendor they are given credentials for logging into the portal. When you create a new Work Order it is registered in the system and added to the vendor's portal account. If you send an email version of the Work Order to the vendor the email contains a link to the Work Order in the portal with an option to login.

## The Work Order Options

### Simple Completion Option

#### Simple Completion

### The West End WO

**Property:** The West End  
110 31st Ave N, Nashville, TN 37203

**Management:** **First Account** (615) 919-0707

Confirm completion of Workorder #33725 at *The West End*.

Enter notes here, then click all complete below.

Account/Invoice No. (optional)	Actual Fee (optional)
1231231321	77.00

All Complete

If the vendor is able to complete the work with no issues or changes they can simply click the "All Complete" button. They can optionally add a note and update (if available) the Account or Invoice Number and the final cost. The fixtures and parts are updated, Sytewise logs the activity and you get notified. Done!

## Detailed Completion Option

Vendors may need to enter some extra details with the work they perform (or cannot). This when they use the Detailed Completion option.



# Detailed Completion

Check all items that are **NOT** complete and provide further information as to why.

Hide Map

**SERVICE** = part requires repair, **REPAIR** = part failed and was repaired.



**+ Fixture: Roof 10 Ton Unit 3**  
**3 part to repair** *Roof HVAC unit*



OK	Needs Service	Repair Complete
[2] <b>LIGHT 111</b> LED 100		
OK	Needs Service	Repair Complete
[1] <b>LIGHT 111</b> LED 100		
OK	Needs Service	Repair Complete
[3] <b>LIGHT 111</b> LED 100		

## Costs (as recorded by managment)

Qty	Description	Amount	Total
1.00	First Line	\$22.00	\$22.00



The fixtures in question will be shown on a map or floor plan. Expanding the fixture details using the "+" button next to the fixture name reveals all the parts and each three choices for each.

1. **OK:** They find the part to need no service and they did not perform any. In this case they check "OK"
2. **Needs Service:** the vendor can chose this if they find the part faulty but are not performing any repairs
3. **Repair Complete:** This is most typically what a vendor checks. The part needed service and they performed a repair or replacement therefore the part repair is complete.

OK	Needs Service	Repair Complete
----	---------------	-----------------

[3] **LIGHT 111** LED 100

If a part is changed to Repair Complete or Needs Service a note field and image uploader is provided. Vendors can enter notes and upload as many as 6 images. These entries will be a part of the Work Order but also integrated into the fixture on Systwise.

Just like the simple completion version, the detailed version allows the vendor to enter or update costs and account numbers. Once submitted the Work Order's data is integrated into the Sytewise account.

## Reject Work Order

A vendor is given the opportunity to reject any submitted Work Order. This will notify the account managers as set in their preferences and show the Work Order Rejected in the system.

## Reject Workorder #33725: The West End.

Reason for rejection

Reject

# Creating A New Property

To create a new property in Sytewise use the Main Navigation Menu on the left go to Properties > New Property

Read more about creating properties here :[Getting Started > Create A Property.](#)

# Sytewise Vendors

In the Sytewise ecosystem Vendors are the moving parts that keep things working. Vendors, through the Work Order system, correct all wrongs and each property / trade has a default vendor. The vendor portal is how they interact with your properties, fixtures and parts.

## Creating Vendors

Before you can create a property and get started with managing your assets you must have at least one vendor. That vendor can be you, but better yet are a list of reliable and specific trade vendors you can enter into Sytewise to get your work done.

**[Read more here about creating vendors and how they interact with Work Orders and your Sytewise account.](#)**

# Sytewise Surveyors

In the day to day management of any property information is king. And the assessment of your assets with a regular check on their status keeps you ahead of the curve. This is where the Sytewise Surveyor enters the process.

Sytewise Surveyors are a special kind of service provider who is available and trained to evaluate property assets. They interact with the Survey Portal where they locate each fixture in a particular trade. Once an issue is identified the surveyor can use GPS or a floorpan to identify precisely which fixture and part is in question and flag it for issues. They can also choose to take photos or add notes to their report.

The surveyor's input immediately reflects on the property, fixture and part. If they created notes or uploaded images those are also added to the appropriate fixture and part.

## Creating A Surveyor

Go to the Surveyors page and expand the section "Create a new surveyor". This will reveal this form.

### Create A New Surveyor

Company Name

Login Username

Phone Number

Password

Company Email

Physical Address (Optional)

Description (Optional)

Create Surveyor

All the fields are required but the address and description. The login username will need to be unique within the entire Sytewise system and the form will let you know if you need to choose another login name.

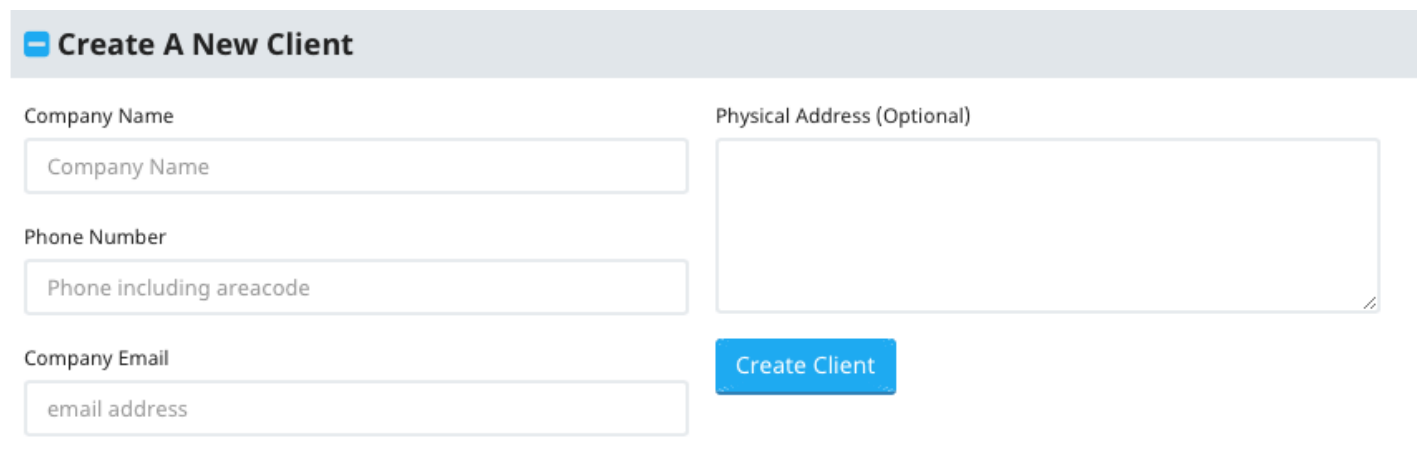
Once you've created a surveyor you can start sending surveys.

# Adding and Managing Clients

Clients are an integral part of property management if the relationship with the property manager is on behalf of an owner. This would be the client. Clients are also integrated into the contract system as there is a relationship between the the vendor and the client and sometimes the Sytewise account holder (the property manager).

## To create a new client

Go to Clients > Clients and expand the section "Create a New Client". A form will appear that looks something like this:



The screenshot shows a web form titled "Create A New Client" with a blue header bar. The form contains four input fields: "Company Name", "Phone Number", "Company Email", and "Physical Address (Optional)". The "Company Name" field has a placeholder "Company Name". The "Phone Number" field has a placeholder "Phone including areacode". The "Company Email" field has a placeholder "email address". The "Physical Address (Optional)" field is a larger text area with a placeholder "Physical Address (Optional)". A blue "Create Client" button is located to the right of the "Company Email" field.

Create A New Client	
Company Name	Physical Address (Optional)
<input type="text" value="Company Name"/>	<input type="text" value="Physical Address (Optional)"/>
Phone Number	
<input type="text" value="Phone including areacode"/>	
Company Email	Create Client
<input type="text" value="email address"/>	

Clients must have a name, a contact phone number and a valid email address at a minimum.

Remember to choose unique names so you can differentiate between entities like clients.

## The Client Profile Page

The client profile page allows many contextual links and tools.

# Creating Surveys

You will and various times need to asses your property's health by checking if everything is in good working order. For example, parking lot lights must be checked on a regular basis. You can't always rely of tenants or others to report outages. This is where Sytewise Surveys do their work.

A survey is a scheduled check of fixtures on your property by trade. Property managers order a survey through the Sytewise system and the surveyor arrives on site before or on the due date. They check if everything is operating and report on the specifics directly into the Sytewise system through the Surveyors Portal.


## To Create A Survey

- Go to the property / trade you want to be surveyed.
- In the top right information section of the property page find the +Survey button and click it to open a modal window.

**Create A New Survey** ×

---

**Due Date**  

 2021-07-21

**Surveyor**  

Joe's Surveys

**Special Instructions**

Close

Save

The default surveyor for that trade is chosen for you. You can chose another by typing the name in



the surveyor's field and choosing from the list. The instructions will be included in the email sent and on the Survey Portal.

# Contracts

The relationships between a property manager, the owner (client) and a vendor often requires contractual definitions. Sytewise contracts are available for any property / trade where required.

## Creating A Contract

From the property / trade you wish to add a contract, click the +Contract button found in the top right of the page header. This will open the new contract modal window.

New Contract

New Contract

Library

Contract with Bargain Hunt

Title

Start Date

2021-07-14

End Date

2022-07-14

User

Joe and Jeff

Vendor

☐ Auto Renews?

Percentage

100

Flat Rate

0

Close

Save

A title is created based on the Property / Trade. You can change the title to anything you want, just be sure to make it unique and identifiable. [See this article on naming.](#)

The start date is today by default but you can change it to whatever suits your needs. The end date is set to one year from today by default but feel free to change that.

The user is assigned for reference and can be used to track the responsible person for the contract. It is by default the user who is logged in.

The vendor is set to the default vendor for the property / trade. This can be changed.

Percentage and flat rate are basic cost references for calculating fees. Sytewise can create custom contract calculations and terms forms. Simply contact us to arrange for an estimate.

# Libraries

A library is a saved set of choices or values associated with a Sytewise Contracts or Fixtures. When used to create a new Object, the library makes it easier to add a complex set of information with one click.

Libraries can be created and used in the following contexts.

## Creating A Library Item

From any existing contract, fixture or property (to save a group of fixtures) click the +Contract button, give the library item a name and save. Make sure your titles are unique and informative. [See this article about naming in Sytewise.](#)



When creating a new item you can choose to create one from scratch or choose to use a library version. Just click the Library Tab when creating a fixture or contract. Choose the library item you wish to use, give it a name and create it.

For Contracts the new contract will inherit all the base settings of your library contract and add any line items from the original.

For Fixtures the new fixture will have all the same values as the original and every part with their details included.

If the library item was created at the property level it will add every fixture in the library reference plus all the details for parts.

The logs for each will not be generated as these are new instances of their respective objects.

# The Fixtures Page

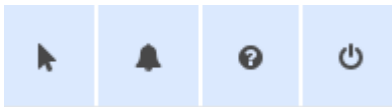
In the Sytewise user interface, there is a menu for "Fixtures". This is a fixture search across all properties and trades within your account. You can search within any trade and on a term. The search term must be more than 3 characters.

The resulting list allows you to see what properties are associated with any resulting fixture. Plus the status of each and the created and modified timestamp.

# Reminders

Reminders are calendar based action items that can be associated with any Property, Trade, Fixture, Client, or Contract. They can be used to issue a new Survey, Create a new Work Order, or Renew a Contract.

Creating a reminder is as easy as going to the page of an item you want to remind yourself of visiting. Touch the bell in the top right navbar.



This will bring up the Reminder Form.

**New Reminder**×

Subject

☐ **! Priority?**

Message


For Me

⌵


☐ Plus Everybody?

☒ Repeating?

Date of Reminder



Save

 Reminders

Close

You must at least give your reminder a subject. Messages are for more details and may require the user to click deeper into the reminder to see. A priority message is red and at the top of a list of

reminders.

# Email Log

Sytewise notification system utilizes a transactional email service. When a Work Order or Survey is issued an email is sent to the vendor or surveyor. Upon completion (or rejection) of the order a new message is sent to administrators who've opted in for property update emails.

Each Work Order and Survey have a log of all emails sent regarding that action. The log shows the status of that message, if it was sent successfully or not.

The Email log is a summary of all emailing acting in one place. You can narrow it down to Work Orders or Surveys and see the list in descending order by date time.