

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:

Create A New Client

Company Name

Company Name

Phone Number

Phone including areacode

Company Email

email address

Physical Address (Optional)

Create Client

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.

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