

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.

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