Creating a Property in Sytewise

Every building, location, or managed space in your portfolio starts as a property record. The property is the anchor for everything else: trades, fixtures, vendors, work orders, surveys, checklists, and reports all connect back to it. Getting a property created correctly takes about two minutes, and this article walks through every step, including how to use the Library to build a fully populated property from a saved template instead of starting from a blank slate.

Before You Start

Two things need to exist before you create a property:

A vendor must be in the system. The property creation form requires a default vendor for the first trade, and you can't proceed without one. If the vendor isn't in Sytewise yet, add them on the Vendors page first.

The property limit for your account must not be met. If your account has a maximum property count and you've reached it, the creation form won't appear and you'll see a message prompting you to contact your account representative. For most accounts this won't be an issue, but it's worth knowing.

Getting to the New Property Page

From the Dashboard, click **+ Property** in the quick action bar or navigate to **Properties** in the left menu and select **New Property** from the submenu. Either route lands you on the same page.

The page has three cards working together: the property information form on the left, a library selection card in the middle (if you have library items saved), and the map and location confirmation on the right.

Creating a Property from Scratch

Step 1: Property Title

Property Title is required and must be unique within your account. Use a name that will be immediately recognizable in lists, reports, and dropdown menus. "2400 Commerce Street Nashville" or "Riverside Plaza HVAC" will serve you better than "New Property 1." Keep it descriptive enough that it reads clearly out of context.

The system checks title uniqueness in the background as you type. If the name is already in use, you'll know before you try to save.

Step 2: Full Address

Full Address is required and needs at least nine characters. Enter the complete street address including city, state, and zip. This is the address that gets sent to Google Maps for validation and coordinate lookup, so the more complete and accurate it is, the cleaner the result.

Step 3: Default Vendor

The **Default Vendor** field searches your vendor list as you type. Enter at least a few characters of the vendor name and select the right one from the autocomplete results. This vendor becomes the default assigned to the first trade on the property. You can change it later and add different vendors for additional trades once the property is created.

Step 4: Trade

The **Trade** dropdown shows all available trades in the system. Select the trade that applies to the first service area you're setting up on this property. If the property has multiple trades (HVAC, plumbing, electrical, AV, etc.), you'll add the others after the property is created. Every property needs at least one trade to start.

Step 5: Lookup Geolocation

This step is required and the Create Property button will not activate until it's complete.

Click **Lookup Geolocation**. Sytewise sends the address you entered to Google Maps, which validates it, formats it, and returns the precise coordinates. The map on the right zooms in to satellite view at the location, drops a marker, and displays the latitude, longitude, and formatted address.

Take a look at the formatted address that comes back. If Google interpreted the address differently than you entered it (a common occurrence with suite numbers or informal address formats), the formatted version shows you exactly what was matched. If the coordinates look right on the map, you're good. If the marker is in the wrong spot, you can drag it to the correct location. Dragging the marker updates the coordinates automatically.

If the geocoding fails (wrong address, unrecognized location, or an API issue), you'll see an error message describing what went wrong. Correct the address and try again.

Step 6: Create Property

Once geolocation succeeds and the map shows the right location, the **Create Property** button activates. Click it.

If the address is already in the system on another property, Sytewise will warn you about the potential duplicate and ask whether to proceed or start over. This is a safety check, not a hard block. If the property genuinely shares an address with an existing record (a multi-tenant building with separate property records, for example), choose **Create Property Anyway**.

On success, a confirmation message appears with a link to go to the new property detail page. From there you can add additional trades, assign a manager, link a client, add images, and start building out the full property record.

Creating a Property from a Library Item

If your account has property library items saved, a library selection card appears between the property information form and the map. This is one of the most powerful shortcuts in Sytewise for anyone managing a portfolio of similar or identical properties.

What a Library Item Contains

A property library item is a complete snapshot of a property's structure: trades, fixtures, and all the parts inside each fixture, including full part specifications. When you create a property from a library item, Sytewise builds all of that structure automatically as part of property creation. You end up with a fully populated property, with trades, fixtures, and parts already in place, rather than an empty shell you have to build from scratch.

The library card displays each saved item with its name and a set of trade badges showing how many fixtures each trade contains. A badge reading "HVAC 5 fixtures" means that library item includes an HVAC trade with five fixtures and all their associated parts ready to deploy.

Selecting a Library Item

The first option in the library card is always **No Library: create a new, empty property**, which is selected by default. To use a library item instead, click the radio button next to the one you want. The rest of the creation process is identical: fill in the title, address, vendor, and trade, run the geolocation lookup, and click Create Property.

When the property is created, Sytewise writes the base property record and then immediately layers in everything from the library item. Trades are created, fixtures are inserted with their coordinates and descriptions, and every part record from the library is recreated on the new property. You land on the property detail page with a complete structure waiting for you rather than an empty map.

What This Means for a Large Portfolio

The library feature is where Sytewise pays real dividends at scale. If you manage fifty retail locations that all run the same HVAC configuration, or a hundred venues with identical AV installations, you don't need to manually build out each property's trades, fixtures, and parts one by one. You build the first one carefully, save it to the library, and every subsequent property inherits that structure in seconds.

The consistency matters as much as the speed. When every property of a given type starts from the same library item, the records are structured identically. Trade names match. Fixture names match. Part numbers follow the same convention. That uniformity makes cross-portfolio reporting cleaner, makes searching more predictable, and makes onboarding new team members simpler because every similar property looks the same in the system.

The library item is a starting point, not a locked template. Once a property is created from it, every record on that property is fully independent and editable. You update the install dates, adjust the part numbers for the specific units on site, add location-specific notes, and the new property becomes its own complete record. The library item stays unchanged, ready for the next property.

Saving a Property to the Library

To save an existing property to the library, go to the property detail page, find the Fixtures section, and click the **Library** button. A small modal asks for a library title of up to 24 characters.

Give it a name that clearly identifies the property type or configuration, something like "Standard Retail HVAC Config" or "Venue AV Platform v2," and click Save.

The system captures the complete structure: all trades, all fixtures with their coordinates and descriptions, all parts with their full specifications including manufacturer, model, part numbers, and technical detail fields. That snapshot is stored at the account level and immediately available on the new property page for any future property creation.

After the Property Is Created

The property detail page is where the rest of the setup happens. A few things to take care of right away:

Additional trades are added from the property detail page. Click **New Trade**, select the trade type, assign a vendor for that trade, and save. Each trade becomes its own operational area with its own fixture list, work orders, vendor assignment, and checklists.

Manager assignment is set on the property detail page. Assigning a manager connects this property to a specific admin user, which feeds into the manager filter on the dashboard property list and into property-level permission scoping.

Client assignment links the property to a client record. This is what makes the Clients module useful at a portfolio level: one client organization can have multiple properties grouped under it, with consolidated reporting and billing.

Property images can be uploaded after creation. Use the upload function in the map section of the property detail page to add site photos, floor plans, or reference images. Images appear in the property's map card and are included in the property print report.

Property details like square footage, number of units, contact phone and email, billing address, store hours, and QuickBooks ID are all editable on the property detail page. Fill in whatever is relevant for your workflow.

The property is ready the moment it's created. Everything else is refinement that makes the record more complete and more useful over time.

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