

# Left Menu Options

The left menu provides access to all major sections of the Sytewise Admin portal. Not all options may be present in your menu bar, as some features are available only with optional add-on modules.

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## Dashboard

The **Dashboard** provides an at-a-glance summary of recent account activity, including open Work Orders, pending Surveys, and system notifications.

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## Properties

The **Properties** section manages the physical locations, buildings, and sites tracked in your account.

**Properties** — View and manage all Property records in the account.

**New Property** — Create a new Property record.

**Property Search** — Search Properties by name, address, or other criteria.

**Merge** — Combine duplicate Property records into a single unified record.

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## Clients — additional module required

The **Clients** section manages the organizations or individuals who are clients of your account. Sub-menu items are generated dynamically based on account configuration.

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# Vendors

The **Vendors** section manages the contractors, service providers, and other Vendors associated with Work Orders and property maintenance.

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# Surveyors

The **Surveyors** section manages the individuals assigned to conduct property and Fixture surveys.

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# Tenants

The **Tenants** section manages the occupants of properties tracked in Sytewise. Tenants can be linked to specific properties and associated with service requests and communications.

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# Users

The **Users** section manages access and contact records for the account.

**Users** — View and manage admin user accounts and their permission levels.

**Contacts** — Manage contact records associated with the account, independent of portal access.

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# Work Orders

The **Work Orders** section manages the creation, assignment, tracking, and completion of maintenance and service tasks across all properties.

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# Surveys

The **Surveys** section manages property and Fixture survey workflows, including survey assignment, completion tracking, and results.

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## Contracts — additional module required

The **Contracts** section manages service agreements and contractual arrangements associated with properties, Clients, or Vendors. Allows tracking of negotiated prices on invoices with the billing module.

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## Bills — additional module required

The **Bills** section manages billing records and payment tracking associated with Work Orders and service activity. Billing for your particular accounting platform may require an additional module or attachment to an API.

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# Fixtures

The **Fixtures** section manages the individual assets and equipment items installed at properties, including details, maintenance history, and associated Work Orders.

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## Cabinets — additional module required

The **Cabinets** section manages cabinet and controller records for AV integrators installing large display screens, including preset configurations for cabinets and equipment layout.

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## Forms — additional module required

The **Forms** section manages vendor-facing forms used to collect field data, safety and injury reports, training and compliance information from contractors and service providers.

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## Checklists — additional module required

The **Checklists** section manages structured work, inspection, and maintenance work by created curated lists of work steps so field technicians can follow and report on completed work including photos, checkboxes, notes, and signatures.

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## Insurance

The **Insurance** section manages insurance policy records associated with Vendors, properties, or Clients, including coverage details and expiration tracking.

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## Library

The **Library** section provides a list of all part, Fixture, Trade, and Property presets to allow Admins to deploy those Items on any property. I have the same HVAC unit on two properties. Create the Fixture once, then save it as a Library item. Deploy it on any property in your portfolio with the click of a button. Just change to location and serial number..

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# Reference — additional module required

The **Reference** section provides access to internal knowledge base articles and reference content to attach to Fixtures including maintenance, firmware, and support information for everyone.

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## Email Log

The **Email Log** displays a record of all outbound emails sent from Sytewise, including system notifications, Work Order communications, and survey-related messages.

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## Reminders

The **Reminders** section manages scheduled alerts and notifications associated with properties, Work Orders, Fixtures, or other records to establish an annual work flow.

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## Account

The **Account** section provides access to account-level settings, user preferences, and system configuration options.

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