

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

Trade Tabs: HVAC, Lights, Miscellaneous, Roofing (+)

Actions: Edit, Print, Library

Buttons: + Survey, + Contract, + WOs

Property Details:

- 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

Note: 2019-02-28 11:40 PM Jeff Thornhill: 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](#)

Map View: All, 0-7ft

Fixtures (3/4):

- 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**

Buttons: 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 are 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**  

[0-7ft] Goodman

V: [Multitasker LLC](#)

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

 **1/2**

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.

Revision #2

Created Thu, Jun 24, 2021 3:16 PM by [Joe Smith](#)

Updated Thu, Jun 24, 2021 4:40 PM by [Joe Smith](#)