Property Page (part 2)

The bottom half of the property page includes related information and links related to the selected Property / Trade. This article covers these parts of the property page. Read more about the top portion of the property page.

The property page includes a Tenants Section, A Work Orders Section, A Surveys Section and a section for Files and Insurance.

Tenants

Pinkston Family Unit: 845	✉	+ Memo
Lakers Unit: 841	✉	+ Memo

+ Tenant   ⬆ Import

Work / Purchase Orders   ⬇ CSV

NO	DATE	PROPERTY	SUBJECT	VENDORS	DUE/COMP	ACCNO	TOTAL
33693	Mar 22, 2021	Beth Drive Homes WO ⬈	Beth Drive Homes WO	Lights Galore ⬈ Main Office	Mar 22, 2021		$0.00
33686	Mar 19, 2021	Beth Drive Homes WO ⬈	Beth Drive Homes WO	Lights Galore ⬈ Main Office	Mar 22, 2021		$0.00
124	Feb 5, 2018	Beth Drive Homes WO ⬈	Joe's HVAC thing	Lights Galore ⬈ Main Office	Mar 22, 2021		$0.00

Surveys   ⬇ CSV

ID	SURVEY	PROPERTY	SURVEYOR	DATE	DUE/COMP
149 ⬈	Beth Drive Homes Survey	Beth Drive Homes ⬈	A Surveyor ⬈	Mar 22, 2021	Mar 22, 2021
145 ⬈	Beth Drive Homes Survey	Beth Drive Homes ⬈	A Surveyor ⬈	Mar 19, 2021	Mar 19, 2021

Files and Insurance

Proeprty Insurance AXB9954939
☑ Insurance Policy?
Jun 24, 2021 - Jun 24, 2023
Policy #

Delete

Add File or Policy

The Tenants Section

Each Sytewise property can have a number of tenants. They are trade independent so they are available no matter what trade you select. A tenant portal is available for tenants to respond to memos and send messages to admins.

Sytewise's tenant portal is a way to communicate with tenants in a convenient way that associates property and fixture information from the Sytewise Property / Trade specifically.

To create a memo

Click the "+Memo" button. In the popup window you can set a subject (which will be the email subject as well), a message and select fixtures to include in the memo from the fixture list. This sends the tenant a memo email with a link to the tenant portal. You can view any memos and their responses clicking the chat icon.

Once a memo has been created and it is associated with a fixture clicking the "Add to Fixture" button adds a note and any images in the memo to the associated fixture.

To add a tenant

Click the "+Tenant" button and fill out the popup form. If you want tenants to access the Tenant Portal create a username and password.

Once you have tenants you can click their name to go to their profile page and edit their information.

Clicking the envelope icon opens your email client with a new message to the tenant.

Work Orders and Surveys Section

All Work Orders and Surveys are listed in their respective sections. These are sorted by date with most recent at the top. A white background listing is active but incomplete. Green is completed

and red is past due.

Clicking the number, date or title of the Work Order or Survey takes you to their respective details. You can also go directly to vendor's or surveyor's page from the list.

Files and Insurance

At the bottom of a Property / Trade page, as well as several other contexts within Sytewise, you can upload files. These files can be image (gif, jpg or png) or PDF files.

Once you've uploaded a file you can designate that file as an insurance policy. Doing so will add the insurance effective dates and policy specific information. Expired policies are indicated with a red background.

Revision #2

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