Reporting in Sytewise: What You Have, How to Use It, and How to Make It Work for You

Good reporting is the difference between managing a property and understanding it. Sytewise generates detailed reports at every level of the system, from a single fixture to an entire portfolio, and gives you the tools to turn those reports into a recurring documentation habit that builds a real operational history over time. This article covers what each report includes, how to get it, and how to wire the whole thing into a workflow that practically runs itself.

Property Reports

The property print report is the most comprehensive single document in the system. Open any property, click the print icon, and you get a full snapshot of everything tied to that property at that moment.

What it includes:

The report opens with the property header, address, unit count, and square footage alongside your company's contact information. A map or property image appears at the top depending on what's configured.

From there the report works its way through every layer of the property record:

Contacts lists every person associated with the property, with phone, email, and their role.

Trades and vendors shows which trades are active on the property and which vendor and surveyor are assigned to each one, so anyone picking up the report knows who handles what without having to dig through the system.

Property notes appear in chronological order with timestamps and their source, whether they were entered by an admin, generated from a work order, or submitted through a survey. Reading the notes history of a property tells you the story of that building's issues and resolutions over months and years. That accumulation of notes is genuinely useful when you're trying to figure out why a recurring problem keeps happening.

Fixtures appear as a summary table with status, recent notes, image status, type, and description. If checklists are attached to fixtures, their completion percentages and progress bars appear in the report so you can see at a glance how much documented maintenance has been completed.

Work orders appear in a table with number, date, subject, vendor, due date, completion date, account number, and total fee. The full work order history of a property in a single table is one of the fastest ways to see how much was spent, what vendors were used, and how often specific types of work recurred.

Surveys appear similarly with surveyor, dates, and completion status.

Bills and **insurance/files** round out the financial and compliance picture.

At the bottom, a chart shows fixture status changes over time so you can see visually whether a property's overall condition is trending up, holding steady, or declining.

This report works well as a handoff document when a property changes management, as a quarterly review packet, or as the foundation of a client-facing condition summary.

The Properties Report Page

The **Properties Report** page (separate from the property print view) lets you search and filter across your entire portfolio and export results as a CSV. You can report by:

- **Trade**: All properties with a specific trade, showing the property name, address, vendor, and client for each.
- **Vendor**: All properties served by a specific vendor across the portfolio.
- **Line item type**: For portfolios with service contracts, report by specific contract line items across all locations.
- **Fixture text search**: Find all properties containing fixtures that match a name, part number, or model.

Every result table has a **Download CSV** button so you can pull the data into a spreadsheet for further analysis or client reporting.

The portfolio-level reporting is where you start to see patterns that individual property views can't show you. Which vendor shows up on the most work orders? Which trade generates the most spend across the portfolio? Which properties have the most open work? The CSV exports make it straightforward to answer those questions.

Fixture Reports

The fixture print report goes deep on a single piece of equipment and its complete documented history.

What it includes:

The header identifies the fixture by name, description, and property context. Any cover image designated as the primary archived photo appears at the top.

Notes appear in chronological order with timestamps, giving you the full running log of everything observed, repaired, or noted about this specific piece of equipment.

Images are displayed in a gallery grid, providing a visual record of the fixture's condition over time. A picture taken during a service call six months ago is still there when a problem recurs, and being able to compare current condition to past photos is genuinely useful for diagnosing whether something got worse or was never properly fixed.

Parts and specifications appear in a structured table with part numbers, manufacturer, model, description, and installation dates. For AV and technical fixtures, this is the complete equipment manifest for that installation.

Checklists attached to the fixture appear in full detail, with every item, its completion status, notes entered, images uploaded, and signatures captured. A fixture that has been through three annual maintenance checklists has three years of documented inspections in this report.

The fixture log at the bottom shows a chart of status changes over time, the same visual history as the property report but scoped to this one fixture.

The fixture report is the document you want when a vendor questions whether a piece of equipment was ever serviced, when an insurer asks for maintenance records, or when you need to make a capital replacement case based on documented decline.

Work Order Reports

Every work order has a print view that serves as a formal record of the job.

What it includes:

The header identifies the work order by number and name. The report shows the from and to parties (your company, the client, the property, the vendor) alongside the account number, issued date, due date, and fee.

Instructions appear in full, followed by any vendor notes and a chronological notes history showing every entry made during the life of the work order.

Fixtures appear in a table showing the fixture name, part number, description, and the status outcome for each one as reported during the work. Status badges (OK, FAIL, FAIL/REP, No Change) give a quick visual summary of what was found.

Line items show the detailed cost breakdown with quantities, descriptions, and amounts.

The email log at the bottom of the work order print is one of the most underappreciated parts. It records every email sent from that work order, who it went to, when it was sent, and whether it succeeded or failed. This is your proof of notification if a vendor ever claims they didn't receive the assignment.

Work order reports are the natural output at the close of a job. Archiving them by property gives you a searchable maintenance history. The CSV export from the work orders list lets you pull the full WO history for a property, a vendor, a date range, or a trade combination and analyze it however you need.

Survey Reports

Survey reports document what a surveyor observed in the field.

What it includes:

The header identifies the survey, property, and surveyor. The report shows due and completion dates, with color coding for overdue status.

Instructions given to the surveyor appear first, followed by the **submitted fixtures** section showing each fixture the surveyor reviewed. For each one: its on/off status, part number, position, description, surveyor notes, and any images captured during the visit.

Fixture updates and **part updates** capture any changes the surveyor noted during the inspection.

The **email log** records every communication sent as part of the survey workflow.

Survey reports work well as scheduled condition documentation. A quarterly survey with a consistent set of fixtures builds a time-stamped record of how each one looked at each visit, which is exactly the kind of documentation that supports capital planning conversations and vendor accountability.

Checklist Reports and the Custom Report Engine

Here is where reporting in Sytewise gets genuinely flexible.

A completed checklist is a report. Every item in the checklist is a data point: a note, a photo, a signature, a set of checkboxes, a file upload. The checklist print view presents all of that in a clean, structured document with the fixture and property context, completion percentages, who completed each step, and when.

That means the checklist system is not just a task-completion tool. It is a fully customizable report builder.

Building a Property Condition Report

A property condition report is a structured walk through a property or set of systems that documents what was found, with evidence, signed off by whoever conducted the inspection. Here is how you build one using a checklist template.

Create the checklist template. Go to the Checklists page and create a new template. Give it a name like "Property Condition Report" and set the trade to "Any Trade" so it's available across property types.

Build the checklist items as inspection categories. Each item in the checklist becomes a section of the report. For a property condition report, you might build items like:

- *Exterior Condition* with a note field (required), up to five images (required), and simple checkboxes for items like "No visible damage," "Landscaping maintained," "Signage intact"
- *Parking Area* with a note field and image upload, checkboxes for "No standing water," "Lines visible," "Lighting functional"
- *Roof Access and Condition* with a note field, required image upload, and a signature requirement so the inspector certifies the observation
- *HVAC Units* with a note field, images, and checkboxes for "Units operational," "No visible leaks," "Filters checked"
- *Common Areas* with notes and images
- *Any system, space, or component you want documented*

Use the requirement options to enforce quality. Mark photos as required on any item where visual evidence matters. Require notes on anything where a written observation is necessary. Require a signature on the final summary item to capture who conducted the inspection and certify the report. These requirements mean the checklist can't be marked complete without the evidence being submitted.

Assign it to the property as a fixture checklist. When it's time to conduct the inspection, assign the checklist template to the relevant fixture or property-level fixture, set a due date, choose the inspector as the vendor or internal user, and send the link.

The inspector completes it from their phone. They walk the property, tap through each section, write their notes, upload photos from their camera, check the applicable boxes, and sign off at the end. All of it is submitted and stored.

Print the completed checklist. The checklist print view becomes the condition report: every section, every note, every photo, every checkbox result, every signature, with the date and name of who completed it. It is a fully documented property condition assessment built from a single checklist completion.

The same template can be reused. Assign it again in six months and you have a second condition report. Compare the two and you have a documented record of whether conditions improved, held steady, or declined. Over two or three years, that pattern becomes a legitimate basis for capital planning, vendor performance conversations, insurance documentation, or client reporting.

The template is fully customizable to any report type. A fire safety walkthrough. A move-in/move-out inspection. An AV system commissioning sign-off. A post-storm damage assessment. An annual vendor performance review. An equipment inventory audit. Any structured inspection or documentation process that benefits from notes, photos, signatures, and checkboxes can be built as a checklist template and reused indefinitely.

Turning Reports Into a Recurring

System

A report generated once is useful. A report generated on a schedule, consistently, over time, becomes a documented operational history. Here is how to wire reporting into a recurring workflow using the Reminders system.

Create a checklist template for each recurring report type. Property condition report, quarterly HVAC inspection, annual fire safety walkthrough, whatever your portfolio requires. Build the template once so the structure is consistent every time it's run.

Set up a work order with a recurring reminder. Create a work order for the inspection or service, assign the vendor or inspector, and attach the relevant checklist. Then attach a reminder to that work order with **Replicate this Work Order** checked, set to the correct recurrence frequency (quarterly, annually, semi-annually). Each time the reminder fires, one click creates a new work order with the same structure, the same vendor, and the same checklist, ready to be sent.

Set a reminder to assign the checklist directly. For condition reports or inspections that don't require a full work order, create a reminder attached to the relevant property or fixture and set it to the appropriate frequency. When the action fires, you assign a fresh checklist from the template to the fixture, send the link to the inspector, and the report is collected and stored.

Use the calendar view to see the full year. The Reminders calendar shows every scheduled recurring event across your portfolio. A properly set-up calendar shows you inspection months, service windows, contract renewal dates, survey cycles, and reporting deadlines all in one view. Planned work is visible. Unplanned events land in a context where you already know what's coming and can respond without losing track of the routine.

The long-term value compounds. A property that has a condition report completed every six months for three years has six documented snapshots of its physical state. That record answers questions before they're asked. It supports warranty claims. It demonstrates due diligence to insurers. It shows clients that conditions are being actively monitored. And it gives you the factual basis to have productive conversations with vendors about work quality and recurring problems.

Reports are only as useful as the habit behind them. The Reminders system is how you turn that habit into infrastructure.

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