Setting Up Admin Users in Sytewise

This article walks through the entire process: creating the account, configuring every setting on the user profile page, and understanding how Assigned Properties and Favorite Properties work together to give each of your team members exactly the right slice of the portfolio.

Who Can Create and Manage Users

User management in Sytewise is a superuser privilege. Only accounts flagged as Super Users can access the Users page, create new users, or modify another user's superuser status. Standard admin users can view and edit their own profile, but they cannot see the full user list or create new accounts. If you need access to the Users page and don't have it, find your account's superuser and have them take a look at your profile.

Creating a New User Account

Navigate to Users in the main menu. Below the user list you'll find the Create a New User form. It's straightforward, but a few details are worth noting before you start typing.

Name is the user's display name throughout the system. It shows up in work order assignments, the user list, and anywhere Sytewise identifies who did what. Use the person's real name, or at least something recognizable to the rest of the team. "User 4" will confuse everyone including you.

Username is what the person types at login. It must be unique across the account, at least five characters, and cannot contain special characters. Spaces are allowed, but keeping it simple (first initial and last name, for example) will make everyone's life easier. Once the account is created, the username cannot be changed, so take a moment before you finalize it.

Email is where Sytewise sends work order and survey notifications. Make sure it's accurate. A misspelled email address is a quiet problem: the account creates successfully, the user can log in, and you only find out something is wrong the first time an important notification goes nowhere.

Password and **Confirm Password** set the initial login credentials. Passwords must be at least eight characters, include at least one capital letter, and include at least one number. The user can change their password after logging in, so the initial password just needs to get them through the door.

Click Create User. The account is active immediately and the user can log in right away.

The User Profile Page

Once the account is created, click the user's name in the list to open their profile page. This is where the real configuration happens. The page is organized into a left sidebar with profile details and a series of cards on the right covering account settings, password management, email preferences, and property assignments.

Account Settings

The main account settings card contains the fields you filled in during creation, plus a few more that only appear after the account exists.

Name can be updated here at any time.

Username is displayed but locked. It cannot be edited after creation, which is a good reason to get it right the first time.

Email can be updated here. If a user changes their email address, update it here so notifications keep reaching them.

Phone is an optional contact number for the user. It's for internal reference only and doesn't affect any system behavior.

Default Trade for Properties sets the trade that is pre-selected when this user creates a new property. If your account primarily manages one type of system, setting this saves a step every time a new property gets added. A user who creates nothing but lighting properties, for example, should have their default trade set to Lighting so they're not hunting through the dropdown every time.

User Permissions

Four checkboxes sit in the account settings card. Each one is small. Each one matters.

Active, can log in is the on/off switch for the account. Unchecking it locks the user out without deleting the account or any of its history. When a team member leaves and you're not sure yet whether their records need to stay associated with their name, deactivate rather than delete. You can always reactivate later.

Super User This role gives the user full administrative access: the ability to create and edit other users, manage the full property list regardless of assignments, and access every area of the system. Assign this carefully. Most users don't need it. If the user is managing a group or team, I recommend it.

Can view onboarding results grants access to vendor onboarding files with personal information. Enable this for team members who are involved in vendor management and HR. Users who do not handle vendor onboarding, or should not have access to private information do not need this

Do not show reminder popups suppresses the reminder notification that appears when the user logs in. By default, users with pending reminders see a popup drawing attention to them. If a particular user finds that disruptive or manages their reminders through other means, check this to give them a quieter login experience.

Global Email Preferences

This section is small on the page but has a significant effect on how useful Sytewise is as a communications tool. Three checkboxes control whether this user automatically receives email notifications for activity across the entire account, regardless of which specific properties are involved.

Receive All Work Order Responses (including Rejections) sends this user an email every time a vendor submits a response to any work order in the account. That's every completion, every partial update, every rejection. For the person running operations who needs a finger on the pulse of everything in motion, this is the right setting. For a regional manager who only cares about their twelve properties, it will quickly become noise.

Receive All Work Order Rejections is a narrower version of the above. Instead of all responses, this user only gets notified when a vendor rejects a work order. Rejections typically require some kind of follow-up action, making this a good fit for a supervisor or dispatch coordinator who doesn't need to know about every completed WO but absolutely needs to know when something got turned down.

Receive All Survey Responses sends a notification every time a survey is submitted anywhere in the account. Survey responses often include photos, inspection results, and field notes. The people who need to review those and act on them should have this checked. The people who don't should not, or their inbox will tell the story of every survey in the portfolio whether it involves them or not.

These are global settings. They apply to every property and every vendor in the account. For users who need notifications tied to specific properties rather than the whole portfolio, the per-property email preferences live in the Favorite Properties section below, and they offer more precise control.

Assigned Properties

The Assigned Properties card shows which properties this user has been designated as the managing user for. Assigning a property to a user is a superuser action: the search field only appears for superusers, and the assignments are made directly on the user's profile page by searching for a property name and selecting it.

When a user has properties in their Assigned list, those properties are associated with their user record in the system. The dashboard defaults to showing that user's assigned properties, and the system can filter work orders, reports, and other views by the assigned user. This is how you organize a large portfolio among multiple managers: each person's assigned properties represent their territory or their responsibility.

To remove a property from the Assigned list, click the remove action next to the property name. The property itself is not affected. Only the association between this user and that property is removed.

A regional manager who handles all retail locations in the Southeast is a good example. Assigning those twelve properties to her profile means her dashboard shows her portfolio when she logs in, work orders for those properties can be filtered by her name, and the rest of the team's view stays organized around their own assignments.

Favorite Properties

Favorited properties are important for workflow. If you want to work on a specific Client's properties, select them as favorites. Or if you are working on HVAC maintenance on a group of properties, select those properties of favorites and they will show up as a subset of the entire portfolio. You can also select to see properties by state, map view, and other users.

Adding a property to your Favorite List is easy. To add a property to your Favorites, start typing the name of the property in the field and select the property from the list that appears. To remove it, click the trashcan icon and it will be removed.

The Difference Between Assigned Properties

These two lists are easy to conflate, but they serve different functions.

Assigned Properties is an organizational designation. It answers the question: who is responsible for this property? Assigning a property to a user is typically done by a superuser and reflects the actual structure of the team. It affects dashboards, reporting filters, and how the account's portfolio is divided among the people managing it.

Favorite Properties is a personal preference and a notification tool. It answers the question: which properties does this user want to watch closely? Any user can add or remove their own favorites, independent of who is formally assigned to what.

Two examples to make the distinction concrete:

A maintenance coordinator oversees a portfolio of twenty warehouse properties. All twenty are assigned to her by a superuser. Her dashboard opens to those twenty properties and excludes everything else in the account. Inside her Favorites, she's added three properties that have been especially active recently so she gets email notifications every time a work order comes back or a survey is submitted at those locations.

A company owner wants visibility into everything but isn't the hands-on manager for any individual property. He has no Assigned Properties at all, so his dashboard shows the full portfolio. He's added four flagship client locations to his Favorites and has survey notifications turned on for each one, so he sees those results when they come in without being buried in notifications from the rest of the account.

Dashboard Shortcuts

In the left sidebar of the user profile you'll find a Shortcuts card. Each user can select up to five shortcuts that appear as quick-access tiles on their dashboard. Available shortcuts include commonly used areas like Work Orders, Properties, Vendors, Surveys, and others depending on which modules are enabled for the account. Check the ones this user will reach for most often. It's a small quality-of-life setting that makes the daily login a little faster.

Profile Picture

Also in the left sidebar is a Profile Picture card. Click Upload New Profile Image to upload a photo via Cloudinary. The image appears on the user's profile card and, in some views, alongside the user's name in the interface. It's entirely optional and has no effect on system behavior, but it does make the user list feel a little less like a spreadsheet.

Changing a User's Password

The Edit Password card provides a straightforward two-field form for setting a new password. This is useful when a user is locked out, when an initial temporary password needs to be replaced by an admin, or when someone has forgotten their credentials entirely. The same rules apply as during account creation: at least eight characters, one capital letter, one number.

Revision #1

Created Tue, Jun 2, 2026 4:03 PM by Jeff Thornhill

Updated Tue, Jun 2, 2026 4:36 PM by Jeff Thornhill