

The Dashboard

The initial page once you log in is your property management dashboard.

The dashboard features a top navigation bar with four main sections: Properties (23), Vendors (10), Users (2), and Surveys (1). A dropdown menu for 'WO/POs' is open, showing 'Surveys' and 'Configure'. Below the shortcuts are search filters for '+ Property', 'All Properties', and 'CSV', along with search boxes for 'Search Vendors By Name' and 'Search by Client Name'. The main content area is split into a 'Map' view of Nashville and a list of '4 properties'. The property list includes details for 'Beth Drive Homes', 'Giordano', 'Kat & Rene', and 'Mary Lu & David'.

Shortcuts

The top contains your shortcuts. These are summary color blocks that are also links to important sections of the Sytewise system.

To edit your shortcuts

- Go to your user profile page by clicking your photo
- Or click the shortcuts button below the blocks
- Or click the "Configure" item in the shortcuts dropdown
 - Find the shortcuts section and select up to 5 by checking the checkbox next to the shortcut.

Special Dashboard Tools

Just below the shortcuts is a set of buttons and search boxes that have particular functions. These choices are changing as Sytewise continues to improve it's toolset but the basics will remain the same.

Creating a new property

You can create a new property from the Main Menu on the left at anytime. Go to Properties > New Property. The dashboard and property pages also have a one click button that take you to the new property page.

Printing and Downloading All Properties

Sytewise lets users maintain a "Favorite Properties" list that is what is displayed in the Properties Summary on the dashboard and properties page. If you want to print or download a CSV of all the properties in the account click the associated button.

Quick Searches

On the dashboard there are quick search fields for going straight to a vendor or client profile page. Simply start typing the name of a vendor or client in the field, select the name from the list (arrow keys or with your mouse) and hit return. This will take you to the appropriate page.

Property Summary Map and List

The main part of the dashboard and property pages is the map and list of your favorite properties. You can add favorite properties in your User Profile or by visiting a property page and click the star next to the property name.

Clicking on a map marker reveals the property name (as a link to that property) and highlights the property in the list to the right. You can scale and move the map around with your mouse. You can also switch views and even go to street level view in every map on Sytewise. Sytewise maps are generated from Googles maps interface and will reflect their user interface and data.

Search by Name

Clicking in the "Search by Property Name" field and start typing will dropdown a list of properties in your account that match by name. Clicking (or using the arrow keys) to a name in the list and hitting return will go to that property page.

Narrowing or Expanding the Summary List

The list of properties (and their corresponding map locations) can be changed using the View By State and User dropdown choices. Simply choose any of the options in the lists and the list changes to only include those. Choosing a state will show all the properties located in that state. Choose a user will show you that user's favorite properties. This can be useful for management to check on the status of an employee's properties.

The Property List

14 **Beth Drive Homes** 

843 Beth Drive, Nashville, TN 37206

Clnt: [Beth's Company](#) Ven: [Vendoropolis](#)

[HVAC](#) [Lights](#) [Miscellaneous](#) [Roofing](#)



The Property Name Line has the Sytewise internal property ID first, then the given name for the property. Clicking either of these will take you to the first created trade for that property. Finally, there is a printer icon which takes you to that property's printable page. The address is always on the second line.

Client and Vendors Line lists the client (which is for every trade on this property) and the default vendor for the first trade created for the property. To see who the vendor is for each trade go to the trade for that property.

Blue Contract Icon to the left allows you to reveal any contracts for the property. Clicking it will load a list of contracts under the property trades.

Property Trades are listed under the client and vendor line. Clicking "Load Trade Statuses" will change the color of each trade button on the list to the current status of that trade. Green: all fixtures in good order. Yellow: at least one fixture is out of order. Red: all fixtures and parts in that trade are in need of attention.

Revision #1

Created Thu, Jun 24, 2021 2:21 PM by [Joe Smith](#)

Updated Thu, Jun 24, 2021 3:09 PM by [Joe Smith](#)