

# Using the Property Library to Build Your Portfolio Fast

## Using the Property Library to Build Your Portfolio Fast

You just added a new location to your portfolio. It's the same retail format you manage at fifteen other properties -- same trades, same HVAC configuration, same lighting setup, same plumbing fixtures. You could spend the next two hours building it out from scratch. Or you could be done in about two minutes.

That's what the Property Library is for.

---

### What Makes the Property Library Different

You may already know about the Fixture Library, which lets you save and redeploy individual fixtures across properties. The Property Library operates at a bigger scale. When you save a property to the library, Sytewise captures the entire structure of that property: every trade, every fixture in each trade, and every part inside each fixture -- with full specifications, manufacturer data, model numbers, part numbers, firmware versions, and all technical detail fields included.

When you create a new property from that library item, all of that structure gets built automatically as part of the creation process. You don't land on an empty property and start adding trades one by one. You land on a fully populated property, ready to refine, with the whole framework already in place.

---

### How to Save a Property to the Library

The best time to save a property to the library is after you've built out a location carefully and completely -- one where the trades, fixtures, and parts are accurate and well-named. That first property becomes the master template for every similar location you add afterward.

Here's how to save it:

1. Go to the property detail page.
2. Find the **Fixtures** section and click the **Library** button.
3. Enter a library title -- up to 24 characters.
4. Click **Save**.

The system captures everything: all trades, all fixtures with their positions and descriptions, and

all parts with their complete specifications. That snapshot is stored at the account level and is immediately available the next time you create a property.

Take your time with the title. "Standard Retail HVAC + Lighting" or "Venue AV Platform v2" will mean something six months from now. "Property Template 1" will not.

---

## Creating a Property from a Library Item

When you go to create a new property and your account has library items saved, a library selection card appears on the New Property page, sitting between the property information form and the map. By default it shows "No Library" selected, which creates a standard empty property. To use a library item instead, just click the radio button next to the one you want.

From there, the process is exactly the same as creating any other property:

1. Enter the **Property Title**.
2. Enter the **Full Address**.
3. Select the **Default Vendor** for the first trade.
4. Select the **Trade**.
5. Select your **Library Item** from the library card.
6. Click **Lookup Geolocation** to validate the address and place the map marker.
7. Click **Create Property**.

Sytewise writes the base property record first, then immediately layers in everything from the library item. Trades are created, fixtures are inserted with their descriptions, and every part record is recreated with the specifications from the library. By the time you land on the property detail page, the structure is already there.

---

## What the Library Item Brings -- and What It Doesn't

A property library item is a structural starting point, not a locked-in clone. Once the property is created, every record on it is fully independent and editable. The library item itself stays unchanged, ready for the next property.

What comes with the library item:

- All trades, with their names and configurations
- All fixtures in each trade, with names, descriptions, and types
- All parts inside each fixture, with full specifications

What you'll fill in after creation:

- **Map positions** -- every fixture starts at the property center point, just like individual library imports. Plan on spending a few minutes moving markers to their actual locations after the property is built.

- **Install dates** -- part records are created, but installation dates should reflect the actual install at this specific location.
- **Serial numbers and site-specific variants** -- model numbers and part numbers come from the library, but serial numbers and any location-specific details get added as you document the actual equipment.
- **Property details** -- square footage, unit count, contact phone and email, store hours, QuickBooks ID, and any other property-level information.
- **Manager and client assignments** -- these are set on the property detail page after creation.

Think of the library item as handling the 80 percent that's the same at every location so you can focus on the 20 percent that's specific to this one.

---

## Designing a Good Property Library Item

The quality of what comes out of the library is only as good as what you put into it. A few things worth thinking about before you save a property as a library item:

**Build to the common case.** The same principle that applies to fixture library groups applies here. If most of your retail locations have four HVAC units, build the library item with four. The locations with six get two additions. The locations with three get one deletion. Either way, it's faster than starting from zero.

**Name fixtures generically but clearly.** Library items work best when the fixture names are consistent across every property that uses them. "RTU-1," "RTU-2," "RTU-3," "RTU-4" will show up on every property in the same way, making cross-portfolio searching predictable. Location-specific names can always be added in the description field once the property is live.

**Include your most complete property.** The library captures part specifications, so if one of your properties has especially thorough part documentation -- correct model numbers, firmware versions, warranty data -- that's the one to save. Every subsequent property starts with that level of detail rather than having to be built up to it.

**One library item per property type.** If you manage multiple formats -- say, a standard retail configuration and a larger anchor tenant configuration -- save one library item for each. A few well-built templates cover a lot of ground.

---

## The Payoff Compounds Over Time

The first time you use a property library item, you save yourself an hour or two of fixture entry. By the time you've brought ten properties on board from the same template, you've saved a day's worth of data entry and ensured that all ten properties are structured identically.

That consistency is the part that keeps paying off. When every similar property starts from the same library item, the trade names match, the fixture names match, the part structure matches.

Cross-portfolio reports are cleaner because the data is organized the same way everywhere. New team members can navigate any property in the portfolio because they all look the same. And when a problem shows up at one location, you can search for the same fixture type across all similar properties in seconds rather than hunting through inconsistent naming conventions.

Build the first property right. Save it to the library. Let it do the work for you from there.

---

*For more on how the Fixture Library works at the individual fixture level, including saving parts, deploying library items to existing properties, and using Include Groups, see **Using the Fixture Library to Build Properties Fast** →*

*For a complete walkthrough of the property creation process including all fields and geolocation setup, see **Creating a Property in Sytewise** →*

---

Revision #1

Created Mon, Jun 1, 2026 1:11 AM by Jeff Thornhill

Updated Mon, Jun 8, 2026 4:01 PM by Jeff Thornhill