Welcome to Your Dashboard

The dashboard is the first thing you see after logging in, and it earns that spot. It gives you a live count of everything happening in your account, a map of all your properties, a full browsable property list, and quick access to vendors and clients. Whether you're getting your bearings or jumping straight into a busy day, this is where it all starts.

The Info Boxes

Running across the top of the page is a row of colorful shortcut buttons. Each one shows a live count of something important in your account: Properties, Vendors, Users, Work Orders, Surveys, Tenants, Reminders, Contracts, Bills, and Clients. Every button is clickable and takes you straight to the corresponding page.

You can choose up to 5 shortcuts to display on your Dashboard. To do this, scroll to the bottom of the info box row and click **Shortcuts** to pick the ones that matter most to your day. If you only care about Work Orders and Vendors, show just those. If you want the full picture every morning, keep them all.

> If your account has an overdue invoice, a red alert banner will appear at the top of the dashboard above everything else. It won't be subtle.

Quick Actions

Just below the info boxes is a three-part action bar.

On the left, you have property management shortcuts:

- **+ Property** creates a new property record.
- **Print All Properties** opens a print-ready view of your full property list.
- **Download All to CSV** exports your property list as a spreadsheet, up to 200 properties at a time.

In the middle, there's a vendor search field. Type at least three characters and a matching list of vendors appears. Select one and you go straight to that vendor's detail page.

On the right, a client search works exactly the same way. Three characters minimum, pick from the results, land on the client page.

The Map

The left half of the lower dashboard is an interactive Google Map showing a red pin for every property in your account. The map automatically adjusts its zoom level to fit all your properties in view when it loads.

Click any pin and a small popup shows the property name as a clickable link. Clicking that link takes you to the property page. At the same time, that property gets highlighted in the list on the right side of the page, so you always know exactly which one you clicked.

If you don't need the map taking up screen space, click the chevron in the Map card header to collapse it. Click again to bring it back.

The Properties List

The right half of the lower dashboard is your full browsable property list. By default it loads up to 200 properties at a time. If you have more, a **Load Next 200** button appears at the bottom to pull in the next batch.

Searching and Filtering

You have four ways to narrow the list:

Search by Name or Zip is the search field at the top of the properties card. Type at least three characters and matching properties appear instantly. Selecting one takes you to that property's page.

View By State is a dropdown that filters the list to a single state. Pick a state and only properties in that state are shown. Changing the state filter automatically clears any manager filter you had active.

All Properties (the manager dropdown) filters the list to properties assigned to a specificmanager or user in your account. Selecting a manager clears the state filter. These two filters work independently of each other.

Search by Address is a secondary search tucked below the other filters. Click the "Search by address" link to expand it. Type at least six characters of a street address and click **Search** to find a property by its address. This is handy when you know the street but not the property name.

What Each Property Shows

Every property in the list displays:

- **Property name** as a clickable link to the full property page
- **Property ID** (a small badge in the corner, or a QuickBooks ID if your account uses that integration)
- **Print icon** to open a printable report for just that property
- **Full address**
- **Client** assigned to the property, if one exists, as a clickable link
- **Vendor** assigned to the property, if one exists, as a clickable link
- **Trade badges** showing every trade active on that property. Each badge is clickable and takes you directly to that property/trade combination.
- **Contracts** are available via a file icon on the property row. Click it and the contracts associated with that property load inline.

If a property has been marked as sold, a red **SOLD!** label appears next to its name.

How the Map and List Work Together

The map and the property list are connected. When you apply a state or manager filter, both the list and the map update together. The map clears its current pins and redraws with only the properties that match your filter. Whatever you're looking at in the list, the map reflects it.

Clicking a map pin highlights the matching property in the list. Clicking a property link in the list navigates to that property. They're two views of the same data, and you can use whichever makes more sense for what you're trying to find.

Additional Reading: SYTEWISE USER INTERFACE, LEFT MENU

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