

# Reference: The Sytewise User Interface

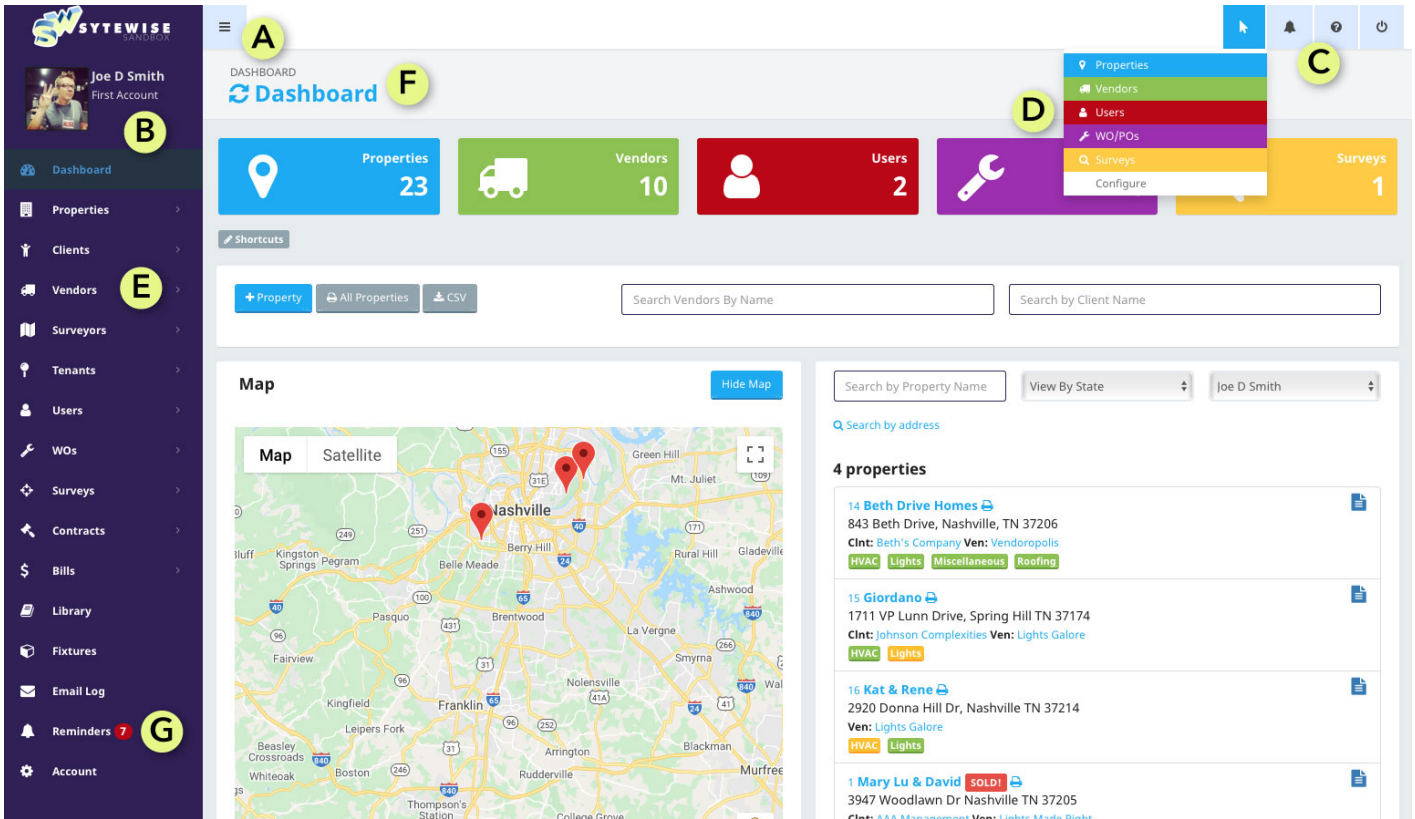
A rundown of the Sytewise user interface from the main admin screen through the menus and pages.

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# Interface parts

## The Sytewise User Interface



Once you are logged in the Sytewise interface will have the following components always available to you.

### A. Menu Collapse

Click this "hamburger" icon to the right of the Sytewise Logo to collapse the main menu bar to the left. This is convenient when you need more screen real estate in the main window area.

### B. Account Block

At the top of the main menu bar on the left is your account block. This area contains the Photo you uploaded for your user profile (the username and password you logged in with). Clicking the Username or the Photo takes you to your user profile page. If you have super user privileges you can click the Account name under the user's name to go to the account settings.

## C. Quick Tools Navigation

At the upper right of the top of every page you will find a series of 4 icons. These are quick links to useful tools in the Sytewise system.

- **Shortcuts Arrow:** Clicking this opens a dropdown with quick links to the shortcuts
- **Reminder Bell:** This drops down the reminder tool. Reminders are one-time or recurring events that remind you on a particular day to do something in Sytewise. Reminders can be attached to many of the items within Sytewise. Just go to that page and start making a reminder.
- **Help Icon:** Clicking this question mark icon takes you to the Sytewise help site. (this site)
- **Logout Icon:** Clicking this icon will log you out of Sytewise. You are automatically logged out after an hour.

## D. Shortcuts

You can set shortcuts for yourself in your user profile. They are in the shortcut quick tools dropdown and are shown on your dashboard (as seen in the image above).

## E. Main Menu Navigation

On the left of the screen in the dark band is the Main Menu. Here are links to every section within the system and their details. Some links have more detail pages in them and require one click to reveal those detail pages. Properties > New Property, Properties > Property Search for example.

## F. Page Header

Each page has a header with a breadcrumb for knowing the context of your current page, a page title and a refresh icon. You can click any of the upward links in the breadcrumb to go back to that page. The refresh Icon is helpful if you need to start your entries.

## G. Reminders Indicator

Next to the Reminders Main Menu item there will occur a number in a red circle. This is the un-attended-to reminders number. If this number appears (it will not if there are zero reminders to attend), you can click "Reminders" in the Main Menu to see what is in your reminders queue.

# The Dashboard

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

The dashboard interface includes a top navigation bar with four main sections: Properties (23), Vendors (10), Users (2), and Surveys (1). A dropdown menu for Surveys is open, showing options for WO/POs, Surveys, and Configure. Below the navigation bar are search filters for Property, All Properties, and CSV, along with search boxes for Vendors and Client Name. The main content area features a map of Nashville and a list of 4 properties with details like address, client, and vendor.

## 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.

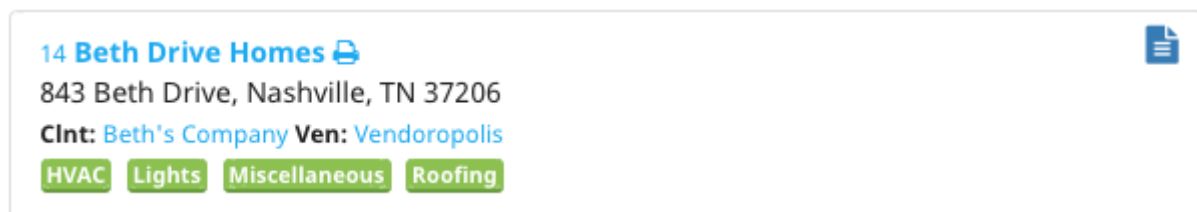
## Search by Name

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



**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.

# Property Page (part 1)

The property page in the Sytewise system is the central hub for all things property management. The page contains all pertinent information about a property with direct links to everything you need to know, if it isn't already represented on the page. There is, in fact so much to cover on the property page we created two pages just for the overview. Reminder: more detailed information about the [use](#) and [best practice](#) of Sytewise is contained in other chapters on this help site.

[Read about the bottom half of the property page.](#)



FYI Anytime you see this icon clicking it expands more information related to the title next to this button.

DASHBOARD > Properties > Beth Drive Homes

14 Property

● HVAC 
 ● Lights 
 ● Miscellaneous 
 ● Roofing 
 +

[Edit](#)
[Print](#)
[Library](#)

★ **Beth Drive Homes**  
 843 Beth Drive, Nashville, TN 37206  
 SqFt: 1680  
 No. Units: 1  
 Region: South Eastern USA

+ **Client** [Beth's Company](#)  
 805 Rodney Dr. Nashville TN 37205

Enter a note and hit return

2019-02-28 11:40 PM Jeff Thornhill [User: Jeff Thornhill](#) [↓](#) [×](#)  
 This. Ote

+ **Vendor:** [Lights Galore](#)

+ **Surveyor:** [A Surveyor](#)

- **1 Contract**

+ 5148 Beth Drive Homes-HVAC Contract [Contract](#)  
 Jun 24, 2021 to Jun 24, 2022    Client: [Beth's Company](#)    Vendor: [Lights Galore](#)    30% Percent: \$0.00

- **Map** [Upload Floorplan](#)

All 0-7ft

Map Satellite

Keyboard shortcuts | Imagery ©2021, Maxar Technologies | Terms of Use | Report a map error.

- **Fixtures** 3/4

+ Fixture + Group + Clone - Delete    Show: All

- **Laker HVAC** [📄](#) [🖼️](#) 0/1  
 [0-7ft] Goodman  
 V: [Lights Galore](#)  
 [admin] Thu Jun 24, 2021 11:11:16 AM
- **Moving This** 2/2  
 [0-7ft] 200lb  
 V: [Lights Galore](#)  
 [survey] Mon Mar 22, 2021 12:26:14 PM
- **Pinkston Home HVAC** [📄](#) [🖼️](#) 1/1  
 [0-7ft] Goodman  
 V: [Lights Galore](#)  
 [wo] Mon Mar 22, 2021 06:34:48 PM
- **Smith Home HVAC** [📄](#) 1/1 replaced  
 [0-7ft] Goodman HVAC installed 2010. Serial Number  
 KLD:FHUNDUOHUBEUBDUBUDHFDKLDKJDFHFH This is for testing the length of the  
 description.  
 V: [Lights Galore](#)  
 [wo] Mon Mar 22, 2021 06:34:48 PM

[Import Fixtures](#) [Inherit Property Vendor](#)

## A. Trade Tabs

Each property has at least one trade. Your account has a set number of trades it can create, contact Sytewise to add or change that list of available trades. Adding a trade is as simple as clicking the "+" button at the far right of the trade tabs.

Switch between trades by clicking the tab. The colored dot indicates the status of that trade's fixtures. Green: all good. Yellow: at least one issue. Red: all parts and fixtures have issues.

## B. Property Settings

The left third of the property info section is for specifics about the whole property, including any trades. Clicking the "Edit" button will open a form to change these settings.

**NOTE:** The property address is not editable. It was set when the property was created in Sytewise and is based on Geolocation technology for properly formatted addresses. It also includes the specific GPS location of the property marker.

## C. Property Client

Each property can optionally be assigned a client. To see the client's contacts and other information expand the information box by clicking the "+" next to the client name.

## D. Add Buttons

On the top right side of the property info section you will find a group of buttons for creating new Work Orders, Contracts and Surveys.

The download icon will download all the fixture data in a CSV format.

## E. Notes

The right side of the property info section includes a notes tool. Simply type a note in the field and hit return to create a new note. Clicking the red "X" will delete the note. Clicking the blue thumbtack will pin the note to the top of all notes.

Each note is timestamped and indicates the username who created it.

## F. Vendor Section

The vendor for the selected trade is listed in the title with a link to that vendor's page. Clicking the "+" button shows the vendor's contact details including any staff or other contacts you've created for that vendor.

To change vendors for the selected trade you can select a vendor by name or by distance from the property. Selected vendors are chosen when creating work orders or contracts for the selected trade.

- **Select a vendor by name**

- Starting typing a vendor's name in the vendor name field. From the list of found vendors click or arrow-key to the name and hit return.
- This will change the vendor for the selected trade.

- **Select a vendor by distance**

- Choose a distance from the dropdown list of distances and click "Find".
- This will produce a list of vendors within the distance selected sorted closest to furthest
- Click the "Select" button next to your vendor of choice to change the vendor for the selected trade.

**Alternate vendors** can be added to a trade. This is useful if your trade vendor is not available for particular work orders. Add alternate vendors the same way you select the primary vendor by name.

## G. Surveyor Section

Surveys are a way of evaluating your properties with a visit from a particular type of vendor or employee. They are given a portal in which they can evaluate the status of your fixtures and parts and report on them directly into the Sytewise system.

Selecting a Surveyor works exactly like selecting a vendor by name but from your list of surveyors.

## H. Contracts Section

This section gives a summary of any contracts associated with the property / trade. It includes links to related vendors, clients and the contract itself. Clicking the "+" next to the contract name reveals more details about the contract. A contract with a gray background has expired.

## I. Fixture Map Section

Sytwise enables you to show fixtures for any Property / Trade on a GPS map or overlaid on a floorpan. By default fixtures are placed on the GPS map, and when you create a new fixture it is placed in the same GPS location as the property.

**Custom markers** indicate the fixture position on the map or floorpan. Yellow markers are for fixtures at ground level up to 7ft. Blue are from 8 to 16ft and Red and 17ft and higher.

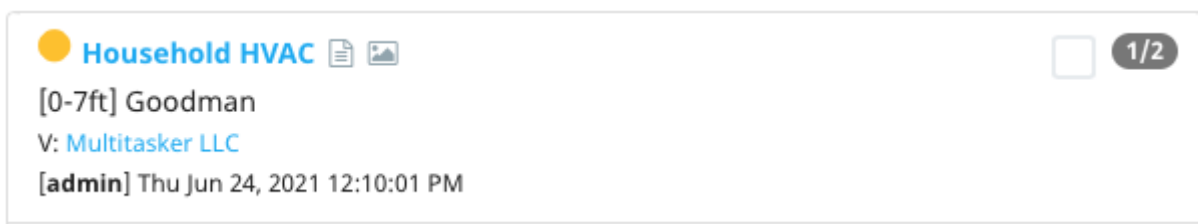
**To use a floorpan instead of the GPS map** you click "Upload Floorpan". Follow the on screen instruction to upload an image. A floorpan must be at least 790 pixels and no more than 2200 pixels in either dimension. Once uploaded any existing markers will be placed in the upper left corner of the floorpan.

A Floorpan can be converted back to GPS, you will lose any marker position data if you do so.

The GPS map is embedded from Google's mapping API and operates like a typical interactive map with size, scroll, satellite and street views.

## J. Fixtures List Section

The list of fixtures for the selected trade includes a lot of useful at-a-glance information and functions.



The screenshot shows a single fixture entry in a list. On the left, there is a yellow circular status indicator followed by the text "Household HVAC" in blue, with document and image icons to its right. Below this, the text "[0-7ft] Goodman" is displayed, followed by "V: Multitasker LLC" in blue. At the bottom left, it shows "[admin] Thu Jun 24, 2021 12:10:01 PM". On the right side of the entry, there is a white square checkbox and a dark gray pill-shaped badge containing the white text "1/2".

**Status and Name:** The colored dot indicates the fixture's status. Green: all parts good, Yellow, At least one part needs service, Red: all parts need service. See the gray numeric indicator to the right for the total good parts / total parts in the fixture. Clicking the name or the status dot takes you to the fixture page.

**Note and Image Icons** will appear to the right of the name if there is either of those associated with the fixture. Mousing over the note icon will summarize the most recent note.

**[Height group]** The fixture's height group is indicated in the brackets.

**The Vendor** for the fixture is indicated after "V:". and is a link to that vendor. A fixture can have an independently assigned vendor, otherwise it is assigned the default vendor for its Property / Trade.

If you set a separate vendor for a fixture and then go back to the Property / Trade and change default vendor this will change the specific vendor for each fixture.

The last line of the fixture listing is the most recent activity on that fixture as a one line log.

[Read more about the property page.](#)

# Property Page (part 2)

The bottom half of the property page includes related information and links related to the selected Property / Trade. This article covers these parts of the property page. [Read more about the top portion of the property page.](#)

The property page includes a Tenants Section, A Work Orders Section, A Surveys Section and a section for Files and Insurance.

Tenants

Pinkston Family Unit: 845 ✉ + Memo

Lakers Unit: 841 ✉ + Memo

+ Tenant
Import

Work / Purchase Orders
CSV

NO	DATE	PROPERTY	SUBJECT	VENDORS	DUE/COMP	ACCNO	TOTAL
33693	Mar 22, 2021	<a href="#">Beth Drive Homes WO</a>	Beth Drive Homes WO	<a href="#">Lights Galore</a> Main Office	Mar 22, 2021		\$0.00
33686	Mar 19, 2021	<a href="#">Beth Drive Homes WO</a>	Beth Drive Homes WO	<a href="#">Lights Galore</a> Main Office	Mar 22, 2021		\$0.00
124	Feb 5, 2018	<a href="#">Beth Drive Homes WO</a>	Joe's HVAC thing	<a href="#">Lights Galore</a> Main Office	Mar 22, 2021		\$0.00

Surveys
CSV

ID	SURVEY	PROPERTY	SURVEYOR	DATE	DUE/COMP
<a href="#">149</a>	<a href="#">Beth Drive Homes Survey</a>	<a href="#">Beth Drive Homes</a>	<a href="#">A Surveyor</a>	Mar 22, 2021	Mar 22, 2021
<a href="#">145</a>	<a href="#">Beth Drive Homes Survey</a>	<a href="#">Beth Drive Homes</a>	<a href="#">A Surveyor</a>	Mar 19, 2021	Mar 19, 2021

Files and Insurance

Proeprty Insurance AXB9954939

Insurance Policy?

*Jun 24, 2021 - Jun 24, 2023*

**Policy #**

Delete

Add File or Policy

## The Tenants Section

Each Sytewise property can have a number of tenants. They are trade independent so they are available no matter what trade you select. A tenant portal is available for tenants to respond to memos and send messages to admins.

The screenshot shows a user interface for a tenant portal. At the top, there are two entries: 'ABC Business Unit: 845' with a '+ Memo' button, and 'Retail Store #2 Unit: 841' with a minus icon, an envelope icon, and a '+ Memo' button. Below the 'Retail Store #2' entry, there is a 'Spring Maintenance Reminder' with the text 'Please have your HVAC services. Let us know when this is complete.' and a timestamp '2021-06-24 12:53:51'. A 'Fixtures:' label is followed by a grey box containing 'Household HVAC'. To the right of this text is a blue 'add to fixture' button. At the bottom left of the interface, there is a blue button with '+ Tenant' and an 'Import' icon.

Sytewise's tenant portal is a way to communicate with tenants in a convenient way that associates property and fixture information from the Sytewise Property / Trade specifically.

## To create a memo

Click the "+Memo" button. In the popup window you can set a subject (which will be the email subject as well), a message and select fixtures to include in the memo from the fixture list. This sends the tenant a memo email with a link to the tenant portal. You can view any memos and their responses clicking the chat icon.

Once a memo has been created and it is associated with a fixture clicking the "Add to Fixture" button adds a note and any images in the memo to the associated fixture.

## To add a tenant

Click the "+Tenant" button and fill out the popup form. If you want tenants to access the Tenant Portal create a username and password.

Once you have tenants you can click their name to go to their profile page and edit their information.

Clicking the envelope icon opens your email client with a new message to the tenant.

## Work Orders and Surveys Section

All Work Orders and Surveys are listed in their respective sections. These are sorted by date with most recent at the top. A white background listing is active but incomplete. Green is completed and red is past due.

Clicking the number, date or title of the Work Order or Survey takes you to their respective details. You can also go directly to vendor's or surveyor's page from the list.

## Files and Insurance

At the bottom of a Property / Trade page, as well as several other contexts within Sytewise, you can upload files. These files can be image (gif, jpg or png) or PDF files.



### Mega Insurance



Insurance Policy?

*Feb 17, 2021 - Feb 17, 2022*

**Policy #** 123455678890

Fred Mega (615) 333-1111

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Once you've uploaded a file you can designate that file as an insurance policy. Doing so will add the insurance effective dates and policy specific information. Expired policies are indicated with a red background.

# Fixture Page

Fixtures are where Sytewise's power comes in full display. A property manager manages fixed assets (Fixtures) and their detailed parts by entering critical information for fixtures and the maintainable parts of any fixture. Simply as a reference this is a substantial resource. But when coupled with Sytewise's Work Orders not only do you have reference you have history and performance.

## The Fixture Page Sections

DASHBOARD > Properties > 310 Central Avenue > York Roof Unit

378 **Fixture**

Property Edit Print Library

Enter a note and hit return

**York Roof Unit** [0-7ft] 200lb  
Property: 310 Central Avenue  
Fixture Report  
Vendor: Vendoropolis

Upload Files

**Fixture Map** Hide Map

Fixture LatLng (move icon to change)  
36.114723,-86.747787 Save

Set To Current Location

Map Satellite

**Parts in Fixture**

Save New Part Clone Part

- [Internal] Compressor** Rotary Compressor MDL#: COMP123 [admin] Fri Apr 27, 2018 11:42:59 AM
- [Internal] 62-23599-05 Control Board** Control Board MFG: RUUD MDL#: 62-23599-05 [admin] Thu Jun 24, 2021 03:08:41 PM
- [Top] 1580W 220V 50Hz Centrifugal Blower Fan** Blower MFG: Carrier MDL#: 1580W220V50H [admin] Thu Jun 24, 2021 03:00:14 PM

## Fixture Details Section

## Fixture Details

This section includes editable detail fields for your fixture including the title, description, installation notes and the default vendor among other characteristics.

### The middle portion is for notes.

Enter a note and hit return to save it. You can delete or pin saved notes.

### The right portion is for uploaded files.

You can upload images (gif, jpg, and png) and PDF files. When you've uploaded a file a thumbnail appears. Clicking the middle of the thumbnail opens images in a popover modal with the original filename at the bottom. Clicking a PDF opens the file in a new browser window from which you can save the file to your local computer.

Click the "Heart" icon in the upper right of any thumbnail to make it the primary image that shows up on the printed summary of the fixture and places it as the first file in the thumbnail grid of files.

## Fixture Map

The Fixture Map is where the map or floorplan marker is located in context. Fixtures are on either GPS or Floorplan maps.

### For GPS Property / Trades Markers

The marker is located by GPS coordinates. The fixture selected will be the larger marker in the center of the map. To relocate the marker click and drag the marker to it's new location. If you have trouble grabbing the marker place your mouse over it's edge and wait a couple seconds. If a "Move Me" label appears, move the marker to your desired location on the map.

Once the marker is at the desired location find the red "Save" button above the map. It will show the new coordinates of your marker. Click save.

### For Floor Plan Markers





When the Property / Trade has an uploaded Floor Plan you can move and save the markers in the same way. Just find the larger marker and click and drag it. (The other, smaller makers are not

"draggable). Make sure you save the new location before leaving the page.

# The Parts List

## Parts in Fixture

Save New Part Clone Part

<input checked="" type="checkbox"/>	<a href="#">[Internal]</a> <a href="#">Compressor</a> Rotary Compressor		
<b>MDL#:</b> COMP123			
[admin] Fri Apr 27, 2018 11:42:59 AM			
<input type="checkbox"/>	<a href="#">[Internal]</a> <a href="#">62-23599-05 Control Board</a> Control Board		
<b>MFG:</b> RUUD <b>MDL#:</b> 62-23599-05			
[admin] Thu Jun 24, 2021 03:08:41 PM			

The parts list is an at a glance view of all the parts in a fixture with tools for managing the list.

Each part lists a summary of the data for that part including

- **[The Position]** in brackets. Position is a short text field that let's you reference how to differentiate similar parts. Uses include "Top", "Southwest", "A", "Internal" etc.
- **Part Number** is the next field, or the name of the part. Both position and Partno are links to open the detail part editor.
- **Description** is on the end of the first line.
- **Manufacturer and Model Number** are on the second line.
- **Recent Activity** is on the bottom

## Managing, Editing Parts

### Status Change

A part can have one of two status's. On or Off. "Good" or "Bad", "In Service" or "Out of Service".

You can change this status by clicking the Red or Green status toggle and clicking the "Save" button above the list. This will be logged as an Admin change to the status of that part and fixture status.

Surveys and Work Orders are the most common way part status's get changed although an admin has the authority to make those changes within the Sytewise master system.

## To Clone A Part

- Select the part to clone by checking the radio choice on the right side of the part listed. It's to the left of the print icon.
- Click "Clone Part" at the top of the list to open the clone part modal window.
- Give it a Position and a new part number if necessary.
- Save.
- This will create an exact clone of the part with all the details.
- Open the new part to edit any differences.

To Delete A Part, open the edit modal and click "Delete This Part"

## Part Details

If the fields made available to you in the parts details are not enough for the information you wish to add to your parts, Sytewise gives you a simple tool for adding a table of data for your parts.

 2021-06-24

format yyyy-mm-dd

#### Table Details

```
Label,Value,Units  
Output,65,Watts  
Input,12,Ohms
```

Comma separated values on each line to table

<b>LABEL</b>	<b>VALUE</b>	
Label	Value	Units
Output	65	Watts
Input	12	Ohms

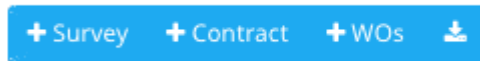
To add a detail table to a part do the following:

- Open a part detail editor by clicking the part name or position
- Find the field labeled "Table Details"
- Enter comma separated text to the field.
  - For example enter: Label, Value, Units for three columns
  - Add a line break (return) to start a new row and enter the same number of comma separated values.
- To preview your table click outside the edit field or tab to escape the field.
  - The new table will appear below the buttons.
  - Feel free to make changes and click out of the field to continue editing
- Once you are done adding your table don't forget to click "Save"

# Creating A Work Order

Sytewise' is a Work Order platform at its heart. This is where the hard work of your property, trade, fixture, part, client, vendor, contract and historical data come to play. Work Orders are easy to create, manage and track. Plus the Sytewise Vendor Portal is a power and convenient way for vendors to record their work. This is the first of a series of articles on Work Orders. Here we will outline the creation of Work Orders from the Property / Trade page.

## Creating a Work Order in Sytewise



From a Property / Trade page you will click the "+WOs" in the top right of the Property Info Section. The New Work Order Modal window will appear and it will look something like this:

Status: Complete (will not become overdue). **A**

Subject / Title  
The West End WO

Order Date  
2021-06-25 **B**

Due Date  
2021-07-02

Vendor [↗](#)  
Lights Galore **E**

Select a Contract [↗](#)  
The West End-HVAC Contract Jun 25 2022 **G**

**Costs** optional  
Reference No.  
Account Number **H**

Labor	85.00	<input type="button" value="↑"/>	<input type="button" value="↓"/>	<input type="button" value="✖"/>
Parts <b>I</b>	167.45	<input type="button" value="↑"/>	<input type="button" value="↓"/>	<input type="button" value="✖"/>
Total	252.45			

Select Fixtures Every None   
Already in a WO

<input checked="" type="checkbox"/> 20 Ton HVAC Roof unit, main	<input type="checkbox"/>	4/4
<input checked="" type="checkbox"/> Roof 10 Ton Unit 1 Roof HVAC unit	<input type="checkbox"/>	3/3
<input checked="" type="checkbox"/> Roof 10 Ton Unit 3 Roof HVAC unit	<input checked="" type="checkbox"/>	0/3

Special Instructions / Description  
**D**

Select contact to receive the work order.  
 **F**

# Parts of the New Work Order Modal

## A. Status Complete

Checking this box will create the work order but will set the status as complete. The due date will be moot as the completion will be at the time of creation. This is helpful if a property manager knows the work is complete and doesn't want to have the Work Order decay in the system.

## B. Subject and Dates

**The Subject of the Work Order** is its title and will be referenced as such in the system, but it will also be the Subject in the email(s) sent to vendors and the responses to administrators.

**A Note about Notifications:** Sending Work Orders to vendors via email occur when you create it, but you can also send the Work Order after it is created. Simply go to the Work Order and re-send.

**You must set your notification preferences** in your user's profile to receive notification of a completed Work Order or Survey.

**Order Date and Due Date** help manage vendor work and system logs. Past due Work Orders are listed in the system with a red background.

## C. Fixture Selection

Any fixture with a non-green status is automatically selected to be in a new Work Order. To choose other fixtures in the Property / Trade click the **every** button to load and select all. You can then use the check marks associated with each fixture to include or not include in the work order.

## D. Special Instructions

You can add a text note to the Work Order for the vendor to read. Use this field to add any instructions that aren't obvious from the property location and the fixtures included. This text shows up in the emails as well as the Vendor Portal.

## E. Vendor Selection

**The Property / Trade vendor** is automatically populated as the Vendor choice for a new Work Order. To change that simply start typing a vendor name in the text field, click or arrow to the vendor name in the list to select that vendor. This choice will only effect the current Work Order and not the Property / Trade or fixtures.

## F. Email Checkboxes

To have the new Work Order sent to the vendor check the boxes next to their email addresses. These email addresses are captured from the vendor profile. It is the main contact email address for the vendor and any contacts within that vendor that have email addresses. If you see no email choices you may want to go to the vendor profile and add one.

Changing vendors for a new Work Order will change the choices of email addresses available.

## Costs, Accounts and Contracts

Here is a portion of the screenshot above that deals with Work Order costs.

Select a Contract [↗](#)

The West End-HVAC Contract Jun 25 2022 **G**

**Costs** optional

Reference No.

Account Number **H**

**+ Add Line Item**

Labor	85.00	⊕ ⊖	⊘
Parts <b>I</b>	167.45	⊕ ⊖	⊘
<b>Total</b>	252.45		

## G. Select A Contract

If the selected Property / Trade has any contracts associated they will appear in this dropdown menu. The most recent and active contract will be chosen if you there are more than one.

When a contract exists the expected costs and account number are automatically inserted into the Work Order. If you change contracts those numbers will change again.

## H. Account Number

If you have a reference or account number to enter for the vendor to see in their Work Order enter it here. Account numbers from contracts are inherited. Vendors can change account number when submitting the Work Order. If they do so a note is added to the Work Order and in your notification.

## I. Costs

You can enter an expected cost and even add line items to a Work Order. This will enable the vendor to see the costs when doing the work. Vendors can change costs when submitting the Work Order. If they do so a note is added to the Work Order and in your notification.

# Work Orders in the Vendor Portal

Syewise offers a Vendor Portal to all accounts where vendors can interact with Work Orders and their account information. When you create a vendor they are given credentials for logging into the portal. When you create a new Work Order it is registered in the system and added to the vendor's portal account. If you send an email version of the Work Order to the vendor the email contains a link to the Work Order in the portal with an option to login.

## The Work Order Options

### Simple Completion Option

#### Simple Completion

### The West End WO

**Property:** The West End  
📍 110 31st Ave N, Nashville, TN 37203

**Management:** **First Account** (615) 919-0707

Confirm completion of Workorder #33725 at *The West End*.

Enter notes here, then click all complete below.

<b>Account/Invoice No. (optional)</b>	<b>Actual Fee (optional)</b>
<input type="text" value="1231231321"/>	<input type="text" value="77.00"/>

**All Complete**

If the vendor is able to complete the work with no issues or changes they can simply click the "All Complete" button. They can optionally add a note and update (if available) the Account or Invoice Number and the final cost. The fixtures and parts are updated, Sytewise logs the activity and you get notified. Done!

## Detailed Completion Option

Vendors may need to enter some extra details with the work they perform (or cannot). This when they use the Detailed Completion option.



## Detailed Completion

Check all items that are **NOT** complete and provide further information as to why.

Hide Map

**SERVICE** = part requires repair, **REPAIR** = part failed and was repaired.



### + Fixture: Roof 10 Ton Unit 3

3 part to repair *Roof HVAC unit*

OK **Needs Service** Repair Complete

[2] **LIGHT 111** LED 100

OK **Needs Service** Repair Complete

[1] **LIGHT 111** LED 100

OK **Needs Service** Repair Complete

[3] **LIGHT 111** LED 100

## Costs (as recorded by management)

Qty	Description	Amount	Total
1.00	First Line	\$22.00	\$22.00

The fixtures in question will be shown on a map or floor plan. Expanding the fixture details using the "+" button next to the fixture name reveals all the parts and each three choices for each.

1. **OK:** They find the part to need no service and they did not perform any. In this case they check "OK"
2. **Needs Service:** the vendor can chose this if they find the part faulty but are not performing any repairs
3. **Repair Complete:** This is most typically what a vendor checks. The part needed service and they performed a repair or replacement therefore the part repair is complete.

OK	Needs Service	Repair Complete
----	---------------	-----------------

[3] **LIGT 111** LED 100

If a part is changed to Repair Complete or Needs Service a note field and image uploader is provided. Vendors can enter notes and upload as many as 6 images. These entries will be a part of the Work Order but also integrated into the fixture on Systwise.

Just like the simple completion version, the detailed version allows the vendor to enter or update costs and account numbers. Once submitted the Work Order's data is integrated into the Sytewise account.

## Reject Work Order

A vendor is given the opportunity to reject any submitted Work Order. This will notify the account managers as set in their preferences and show the Work Order Rejected in the system.

## Reject Workorder #33725: The West End.

Reason for rejection

Reject

# Creating A New Property

To create a new property in Sytewise use the Main Navigation Menu on the left go to Properties > New Property

Read more about creating properties here :[Getting Started > Create A Property.](#)

# Sytewise Vendors

In the Sytewise ecosystem Vendors are the moving parts that keep things working. Vendors, through the Work Order system, correct all wrongs and each property / trade has a default vendor. The vendor portal is how they interact with your properties, fixtures and parts.

## Creating Vendors

Before you can create a property and get started with managing your assets you must have at least one vendor. That vendor can be you, but better yet are a list of reliable and specific trade vendors you can enter into Sytewise to get your work done.

**[Read more here about creating vendors and how they interact with Work Orders and your Sytewise account.](#)**

# Sytewise Surveyors

In the day to day management of any property information is king. And the assessment of your assets with a regular check on their status keeps you ahead of the curve. This is where the Sytewise Surveyor enters the process.

Sytewise Surveyors are a special kind of service provider who is available and trained to evaluate property assets. They interact with the Survey Portal where they locate each fixture in a particular trade. Once an issue is identified the surveyor can use GPS or a floorpan to identify precisely which fixture and part is in question and flag it for issues. They can also choose to take photos or add notes to their report.

The surveyor's input immediately reflects on the property, fixture and part. If they created notes or uploaded images those are also added to the appropriate fixture and part.

## Creating A Surveyor

Go to the Surveyors page and expand the section "Create a new surveyor". This will reveal this form.

### Create A New Surveyor

Company Name

Login Username

Phone Number

Password

Company Email

Physical Address (Optional)

Description (Optional)

Create Surveyor

All the fields are required but the address and description. The login username will need to be unique within the entire Sytewise system and the form will let you know if you need to choose another login name.

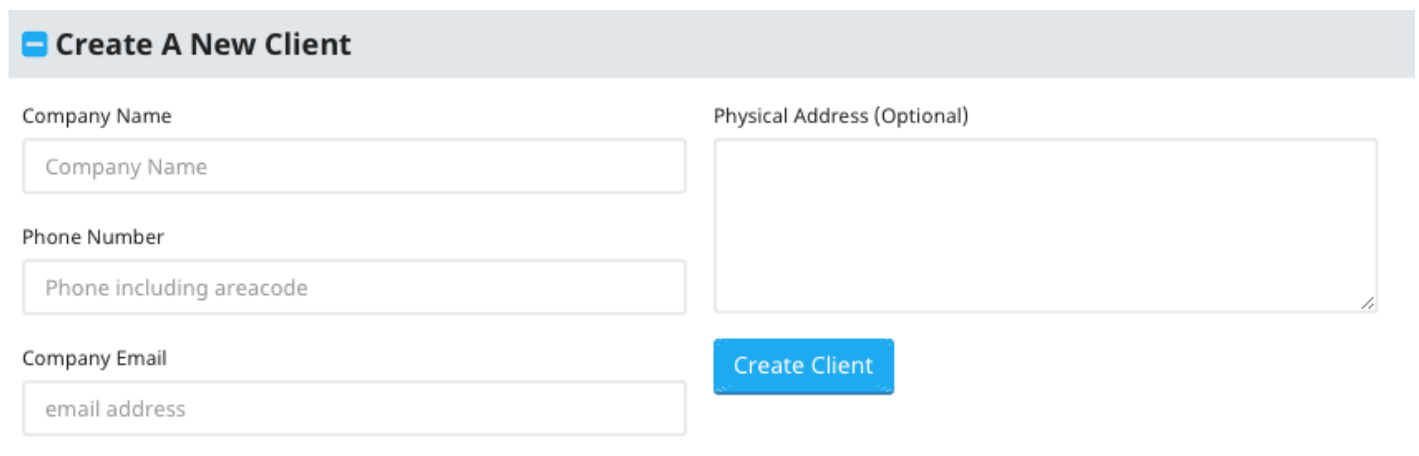
Once you've created a surveyor you can start sending surveys.

# Adding and Managing Clients

Clients are an integral part of property management if the relationship with the property manager is on behalf of an owner. This would be the client. Clients are also integrated into the contract system as there is a relationship between the the vendor and the client and sometimes the Sytewise account holder (the property manager).

## To create a new client

Go to Clients > Clients and expand the section "Create a New Client". A form will appear that looks something like this:



The screenshot shows a form titled "Create A New Client" with a blue header bar. The form contains the following fields and a button:

- Company Name:** A text input field with the placeholder text "Company Name".
- Phone Number:** A text input field with the placeholder text "Phone including areacode".
- Company Email:** A text input field with the placeholder text "email address".
- Physical Address (Optional):** A larger text area for an optional physical address.
- Create Client:** A blue button with white text.

Clients must have a name, a contact phone number and a valid email address at a minimum.

Remember to choose unique names so you can differentiate between entities like clients.

## The Client Profile Page

The client profile page allows many contextual links and tools.

# Creating Surveys

You will and various times need to assess your property's health by checking if everything is in good working order. For example, parking lot lights must be checked on a regular basis. You can't always rely on tenants or others to report outages. This is where Sytewise Surveys do their work.

A survey is a scheduled check of fixtures on your property by trade. Property managers order a survey through the Sytewise system and the surveyor arrives on site before or on the due date. They check if everything is operating and report on the specifics directly into the Sytewise system through the Surveyors Portal.

## To Create A Survey

- Go to the property / trade you want to be surveyed.
- In the top right information section of the property page find the +Survey button and click it to open a modal window.

### Create A New Survey ×

---

Due Date

Surveyor

Special Instructions

The default surveyor for that trade is chosen for you. You can choose another by typing the name in

the surveyor's field and choosing from the list. The instructions will be included in the email sent and on the Survey Portal.

# Contracts

The relationships between a property manager, the owner (client) and a vendor often requires contractual definitions. Sytewise contracts are available for any property / trade where required.

## Creating A Contract

From the property / trade you wish to add a contract, click the +Contract button found in the top right of the page header. This will open the new contract modal window.

### New Contract ×

New Contract **Library**

#### Contract with Bargain Hunt

Title

Start Date  End Date

User  Vendor

Auto Renews?

Percentage  Flat Rate

A title is created based on the Property / Trade. You can change the title to anything you want, just be sure to make it unique and identifiable. [See this article on naming.](#)

The start date is today by default but you can change it to whatever suits your needs. The end date is set to one year from today by default but feel free to change that.

The user is assigned for reference and can be used to track the responsible person for the contract. It is by default the user who is logged in.

The vendor is set to the default vendor for the property / trade. This can be changed.

Percentage and flat rate are basic cost references for calculating fees. Sytewise can create custom contract calculations and terms forms. Simply contact us to arrange for an estimate.

# Libraries

A library is a saved set of choices or values associated with a Sytewise Contracts or Fixtures. When used to create a new Object, the library makes it easier to add a complex set of information with one click.

Libraries can be created and used in the following contexts.

## Creating A Library Item

From any existing contract, fixture or property (to save a group of fixtures) click the +Contract button, give the library item a name and save. Make sure your titles are unique and informative. [See this article about naming in Sytewise.](#)



When creating a new item you can choose to create one from scratch or choose to use a library version. Just click the Library Tab when creating a fixture or contract. Choose the library item you wish to use, give it a name and create it.

For Contracts the new contract will inherit all the base settings of your library contract and add any line items from the original.

For Fixtures the new fixture will have all the same values as the original and every part with their details included.

If the library item was created at the property level it will add every fixture in the library reference plus all the details for parts.

The logs for each will not be generated as these are new instances of their respective objects.

# The Fixtures Page

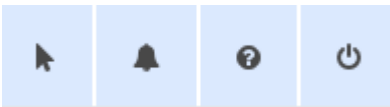
In the Sytewise user interface, there is a menu for "Fixtures". This is a fixture search across all properties and trades within your account. You can search within any trade and on a term. The search term must be more than 3 characters.

The resulting list allows you to see what properties are associated with any resulting fixture. Plus the status of each and the created and modified timestamp.

# Reminders

Reminders are calendar based action items that can be associated with any Property, Trade, Fixture, Client, or Contract. They can be used to issue a new Survey, Create a new Work Order, or Renew a Contract.

Creating a reminder is as easy as going to the page of an item you want to remind yourself of visiting. Touch the bell in the top right navbar.



This will bring up the Reminder Form.

## New Reminder ×

---

Subject

**!** Priority?

Message

For Me  Plus Everybody?

Repeating?

Date of Reminder

You must at least give your reminder a subject. Messages are for more details and may require the user to click deeper into the reminder to see. A priority message is red and at the top of a list of

reminders.

# Email Log

Sytewise notification system utilizes a transactional email service. When a Work Order or Survey is issued an email is sent to the vendor or surveyor. Upon completion (or rejection) of the order a new message is sent to administrators who've opted in for property update emails.

Each Work Order and Survey have a log of all emails sent regarding that action. The log shows the status of that message, if it was sent successfully or not.

The Email log is a summary of all emailing acting in one place. You can narrow it down to Work Orders or Surveys and see the list in descending order by date time.

# Creating a Checklist Template

Think of a checklist template as the master recipe for a recurring task. You write it once, and from that point on, anyone on your team can follow the same steps every time, at every property without reinventing the wheel. Whether you're building a seasonal HVAC inspection, a roof walkthrough after a storm, or a move-out cleaning verification, templates keep the work consistent and the records clean.

This article walks you through building a template from scratch and explains every option available when setting up each item.

## Getting There

From the main navigation, click **Checklists**. The page opens with two sections. **Checklist Templates** at the top and **Fixture Checklist** below. All template work happens in the top section.

Click **+ New Checklist** to open the template panel and get started.

## Step 1 — Set Up the Template

The top portion of the panel is the template's identity card — it tells the system what this checklist is, who it belongs to, and how often it should run.

### Checklist Title *(required)*

Give your checklist a name that leaves no room for confusion. *Rooftop HVAC Quarterly Inspection* will serve you much better than *HVAC Check* six months from now when you're looking at a list of forty templates.

Minimum 2 characters.

### Trade

Assign this checklist to a specific trade — Electrical, Plumbing, HVAC, General Maintenance, and so on, or leave it at **Any Trade** if the checklist isn't tied to a specific type of work. This determines which work orders and vendors the checklist can be linked to when it's assigned in the field.

### Default Start Interval

When this template gets assigned to a fixture, how far out should the first due date land? Enter a number and pick the unit:

Unit	Maximum
Days	150
Weeks	52
Months	12

Setting this to **3 Months** means every new assignment of this template automatically lands 3 months out on the calendar. You can always adjust individual assignments. This is just the sensible default so you're not starting from zero every time.

### Instructions (optional)

Got something important to say before the technician even looks at item one? Put it here. The rich-text editor supports bold, italic, lists, tables, and links so you can include safety warnings, required tools, reference documents, or a note like *"Do not attempt this inspection during active rainfall."* Instructions entered here appear at the very top of the checklist when it's opened in the field.

### Step 2 — Save the Template

Click **Save Checklist**. The record is created and the **Checklist Items** section appears below. Now for the fun part.

### Step 3 — Add Checklist Items

Each item is one task, one inspection point, or one step in the process. Click **Add Item** to expand the form and fill in the details.

### Item Fields Explained

## **Item Title (required)**

Action-oriented titles age better than vague ones.

*Check condenser coil for debris and clean if needed* is clear, useful, actionable. *Condenser coil is* technically correct, completely unhelpful.

Minimum 2 characters.

## **Description (optional)**

This is your chance to elaborate. Step-by-step instructions, acceptable tolerance ranges, reference measurements, specific product numbers, safety reminders — anything the person doing this task needs to know goes here. The rich-text editor gives you full formatting including tables, which is handy for things like pressure reading charts or torque spec tables.

**Example — Electrical Panel Inspection:** Title: *Inspect all breakers for heat damage or corrosion*

Description: *Use a non-contact thermometer. Any reading above 140°F on a breaker at normal load warrants flagging. Document the breaker number and reading in the notes field.*

## **Checkboxes (optional)**

Some steps aren't one thing — they're five things that all need to happen. Rather than creating five separate items, you can load a single item with a set of sub-checkboxes. Type each one on its own line and the system turns them into individual checkboxes in the field.

### **Example — Filter Replacement item:**

Old filter removed and disposed of properly

New filter installed in correct airflow direction

Filter size and rating logged

Access panel secured

Thermostat reset to schedule

## A few things to know:

- Blank lines are ignored
- Duplicates are removed automatically (the system is forgiving if you're copy-pasting from a document)
- Checkboxes can't be used on PPE Detection steps — more on those below

## Completion Requirements

### Must Complete This Item

The red star treatment. When this is checked, the field technician cannot submit the checklist without addressing this item — no skipping, no sneaking past it. Uncheck only for items that are genuinely optional in every situation, like *Photograph optional secondary access panel*.

Required items show a **red star (\*)** in the item list so you can see at a glance which items are locked in.

*Default: checked — because most items on a maintenance checklist probably matter.*

### Zip File Required

When you've attached a zip resource to this item (a wiring diagram, installation manual, or spec sheet — more on that below), checking this box means the technician must download and acknowledge that file before the item can be marked complete. It's the system's way of saying "*you actually have to look at this, not just scroll past it.*"

## Notes

Three options. Pick the one that fits the item:

Optio	What happens
-------	--------------

<b>Note Allowed</b>	A notes field appears but it's optional. Staff can comment if there's something worth recording.
<b>No Note Allowed</b>	No notes field. Clean and simple — the item is pass/fail and a comment section would just add noise.

<p><b>Note Required</b></p>	<p>Staff must type something before moving on. Perfect for items where a reading, measurement, or observation has to be on record.</p>
-----------------------------	--

**Example — Note Required use case:** Item: *Record static pressure reading across the air handler*  
 With Note Required enabled, the technician has to enter the actual reading before they can check the box. The number lives in the record forever.

**Example — No Note Allowed use case:** Item: *Confirm unit is powered off before beginning work*  
 This is a safety confirmation. There's no measurement to record and no variation — it's either done or it isn't.

**Signature Required**

When this is checked, the person completing the item has to provide a digital signature before it can be marked done. Use this for safety-critical sign-offs, supervisor confirmations, or any step where accountability needs to be unambiguous.

**Example:** *Supervisor sign-off: all work completed and tested before leaving site*

Signature items show a **signature icon** in the item list.

## Images

Two controls work together here:

**Max Images Allowed** — A dropdown from 0 to 9.

- **0** means no photos on this item at all
- **1-9** sets the ceiling for how many photos can be attached

**Image Required** — When checked, at least one photo must be uploaded before the item is complete. Only available when Max Images is 1 or higher.

**Example — Image Required use case:** Item: *Photograph equipment nameplate showing model and serial number* Set Max Images to 1, check Image Required. The record now always has the nameplate photo attached. No photo, no sign-off.

**Example — Max Images without Required:** Item: *Document any visible damage or wear* Set Max to 5, leave Image Required unchecked. If there's nothing to photograph, the technician moves on. If there are five things to document, they can capture all of them.

### Illustrations (*optional*)

These are reference materials *you* attach to the item — not photos taken in the field. Think wiring schematics, product installation diagrams, floor plan excerpts showing equipment locations, or any visual aid that helps the technician do the work correctly.

- Images open in a full-screen viewer
- PDFs open in a new tab
- Multiple illustrations can be attached to a single item
- Technicians can see them; they can't delete or replace them

Click **Upload Illustration** to attach files via the media uploader.

**Example:** Attach the manufacturer's maintenance diagram to a *Clean and inspect burner assembly* item so the technician has the correct exploded view right there in the checklist without having to hunt for it.

## **Zip File Resource (*optional*)**

Need to deliver a whole folder of materials to the technician for a specific step? Attach a zip archive. One zip per item, up to 3 GB.

This is the right tool for: firmware update packages, multi-document installation kits, collections of reference PDFs, or software tools needed to complete the task.

Click **Upload Zip** to attach. If **Zip File Required** is also checked, staff must download it before the item can be completed.

## **Can Annotate Images**

*(Available on accounts with the Annotation module)*

Checking this gives field staff the ability to draw directly on photos and illustrations — circling problem areas, adding labels, marking specific locations. The annotations become part of the permanent record.

**Example:** A roof inspection item where the technician photographs a cracked flashing and then circles the crack and labels it "*Active moisture intrusion — NW corner drain*" before submitting.

## **PPE Detection**

*(Available on accounts with the optional Detection Module)*

This one's a bit different. Instead of a standard task item, PPE Detection turns this step into an automated safety verification — the system actually analyzes a photo to confirm the right protective gear is being worn before the step can be cleared.

When enabled:

- The standard form is replaced with the PPE verification panel
- The item becomes required automatically
- The technician must upload a photo, and the system checks it for the selected equipment

**Select the gear to verify:**

Code	Equipment
VEST	Safety vest
HELMET	Hard hat
GLOVE	Gloves
PERSON	Person present in frame
BOOTS	Safety boots
GLASS	Safety glasses

**Example:** For a rooftop electrical inspection checklist, add a PPE Detection step as item one — *Confirm PPE before beginning work* — and select VEST, HELMET, and GLASS. The technician snaps a selfie in their gear, the system verifies the equipment is present, and only then can they proceed to item two. No gear, no green light.

## Managing Items

### Reordering

Each item has **up** and **down** arrows. Click to shift an item one position. The first item has no up arrow; the last has no down arrow. Build your checklist in the logical sequence a technician would actually follow — don't make them jump around.

### Editing an Item

Click anywhere on an item row to expand its edit form. Opening one item automatically collapses the one you were looking at, so the list stays readable.

### Deleting an Item

Open the item's edit form and click **Delete Item**. Permanent — so give it a moment's thought before clicking.

### Item Status Icons at a Glance

The item list shows a row of small icons for each item so you can read the configuration without opening it:

Icon	What it means
* Red star	Item is required
Signature	Signature required
Paintbrush (blue)	Has illustration attached
Paint tool	Annotation enabled
Image	Photos allowed
Image + red slash	No photos allowed
Image + checkmark	Photo required
Comment bubble	Notes allowed
Comment + red slash	No notes allowed

Icon	What it means
Comment + checkmark	Notes required
Archive icon	Zip file attached

A quick scan down the icon column tells you a lot about how a checklist is structured — which items are high-accountability, which are documentation-heavy, and which are straight pass/fail.

### Duplicating a Checklist

Built a solid template and need a close variation of it? Open the template and expand the **Duplicate** section at the bottom of the panel. Give the copy a new name — the system helpfully pre-fills it as *[Original Name] COPY* — and click **Duplicate**.

Everything comes along for the ride: all items, all illustrations, all zip files. Edit the copy freely without touching the original.

### What Happens Next

A template on its own just sits in the library. The action happens when you assign it to a specific fixture on a property — at that point, a live instance is created with its own due date, completion record, and history. The template stays pristine and reusable. The instance is the real-world paperwork.

Head to the **Checklists** tab on any property to put your new template to work.

# Fixture Checklists: From Assignment to Archive

Checklists are how work gets done, tracked, and proven. Once you've built a template (see the article on creating checklist templates), it's time to put it to work on an actual fixture. This article walks you through assigning a checklist, managing it through completion, and downloading the evidence when the job is done.

## Assigning a Checklist to a Fixture

Navigate to the fixture detail page for the unit that needs the checklist. Scroll to the Checklists section and click **New Checklist**.

A two-step form appears.

**Step 1: Pick your template.** The dropdown shows only the templates that match the fixture's trade or are set to "Any Trade," so the list stays relevant. Select your template and click **Next**.

**Step 2: Configure the assignment.** Now the fun part:

- **Checklist Name** is auto filled with the fixture name and template name combined. You can rename it if a more specific name will be better, or add a date to make sure repetitive work is easily found by date.
- **Completion Due Date** is pre-calculated based on the template's default interval. Adjust it to match the actual deadline.
- **Choose A Vendor** is optional. If someone needs to do this work, type at least three characters to search and select from your vendor list.
- **Vendor Emails** appear as checkboxes once you select a vendor. These are the contacts from the vendor's profile who will receive the checklist notification. Check the ones that should get the email. If you're not assigning a vendor yet, leave it blank.
- **Instructions** pulls in from the template but can be edited here for this specific assignment.
- **Upload ZIP Resource** is available if you need to attach reference files (like specs or

drawings) for the vendor to download when they open the checklist.

Click **Create** to save the checklist and send notifications to any selected vendor emails.

## **Checklists and Work Orders**

The most common way vendor email recipients are handled is through the work order, not the checklist assignment directly.

When a work order is created for a property and vendor, the **Linked Checklists** section on the work order page shows any fixture checklists that match the same vendor and property/trade. You can add them to the work order by selecting from the dropdown and clicking **Link Checklist**. The work order email that goes out automatically includes links to those checklists, so the vendor gets everything they need in one place without you having to send checklist notifications separately.

This means that when you're assigning a checklist to a fixture, you may intentionally leave the vendor email checkboxes unchecked because the work order will handle getting the link to the right people. The direct vendor email option on the checklist is there for cases where you're assigning a checklist outside of a work order and need to notify someone right away.

## **Making a Checklist Visible to the Public**

On any active checklist, you'll see a checkbox labeled **Visible on the public site**. Toggle this on and the checklist gets a public URL that doesn't require a Sytewise login.

That link can be shared with a vendor or field tech who needs to complete the checklist on a phone or tablet. They see a clean, mobile-friendly version with only the checklist, not the rest of the admin. The link is also included in the notification email that goes out when you assign the checklist.

## **Watching Progress**

Checklists live in three states: **Not Started**, **In Progress**, and **Complete**. A progress bar on the checklist header shows where things stand at a glance.

While a checklist is in progress, each task card shows the vendor what they need to do. Depending on how the template was built, a task might ask for:

- A written note (allowed, required, or not available at all)
- One or more uploaded photos or files
- Simple checkboxes to tick off
- A signature with a typed full name
- A zip file upload (for submitting documents or reports)

Required items must be completed before that step can be marked done. Optional items are there if the vendor needs them.

The vendor taps **Mark As Complete** on each task when they finish it. The checklist automatically moves to Complete once all required steps are done.

### **Editing an Active Checklist**

Even after a checklist has started, you can make changes. Click **Edit** on the checklist header to update:

- The checklist name
- The assigned vendor
- The due date
- The instructions
- The attached ZIP resource

Vendor email recipients can be updated here as well. Useful when the original contact changed or you need to loop someone new in.

### **When It's Complete: Reviewing the Work**

A completed checklist shows everything the vendor submitted:

- Notes entered for each step
- Images uploaded (click any thumbnail to enlarge)
- Checkbox responses
- Zip files submitted
- Signatures with the signer's name and timestamp

Click **Check All Media** to see every photo and file in one view. If any images are worth adding to

the fixture's permanent record, use the **Add Media to Fixture** checkboxes to copy them over.

### **Downloading All Attachments**

When a completed checklist has photos or uploaded files, the **Download Assets** button appears. Click it and Sytewise bundles everything into a single ZIP file and downloads it to your machine. One click, all the proof.

### **Deleting a Checklist**

The **Delete This Checklist** button is available at any stage. Deleting is permanent, so Sytewise will ask you to confirm before anything disappears. If the checklist is linked to a work order, you can remove that link separately from the work order page using the delete icon in the Linked Checklists table.

### **Finding Checklists Across Properties**

The main **Checklists** page (in your navigation) has a search tool for fixture checklists. Filter by status (Incomplete or Complete), property, trade, and date range, then click **Find Checklists**. Results can be downloaded as a CSV using the download icon at the top of the results table.

# Using Checklists with Work Orders

Checklists and work orders are designed to work together. Understanding when to attach a checklist to a work order versus sending it directly to a vendor will help you get better tracking, cleaner records, and less manual follow-up.

## How Checklists Connect to Work Orders

When you create a new work order, Sytewise checks for any fixture checklists that match the work order's vendor and property/trade. If eligible checklists exist, they appear at the bottom of the WO creation form and you can select them to include. After the work order is saved, the vendor email that goes out automatically includes direct links to every checklist attached to that WO. The vendor opens one email and has everything they need: the scope of work and the task checklists to complete.

You can also attach checklists to an existing work order. On the work order detail page, the **Linked Checklists** section shows what's currently attached and provides a dropdown to add more. Only checklists that match the work order's vendor and property/trade will appear in that list.

**Tip:** A checklist linked to a work order shows up in the WO email automatically. You don't need to send it separately. The vendor gets the checklist link right alongside the work order details.

## When to Attach a Checklist to a Work Order

If the work described in the checklist is tied to a purchase order or vendor invoice, attaching the checklist to the work order is the right call. The work order creates the paper trail: who was assigned, when the work was due, what fixtures were involved, and what the vendor was expected to complete. The checklist becomes part of that record, not a standalone item floating outside of it.

**Tip:** When the work needs to be tracked against a PO or vendor payment, always attach the checklist to the work order. It keeps the accountability in one place and gives you a complete

picture of what was scoped versus what was actually completed.

### **When to Send a Checklist Directly to a Vendor**

Sometimes you need to get instructions to someone without generating a work order. If the task is for internal staff, or the vendor relationship doesn't involve a formal PO, or you just need to send a one-off checklist quickly, you can assign a checklist directly to a vendor from the fixture detail page. Sytewise sends the checklist notification email right away with a direct link, no work order required.

**Tip:** Use direct send when the task doesn't need a work order behind it. A vendor checklist for an informal inspection, a staff task list for routine rounds, or any instruction that doesn't generate an invoice is a good candidate for direct send.

### **Vendor Reassignment Carries Through Automatically**

If you reassign a work order to a different vendor, Sytewise automatically updates the vendor on every checklist linked to that work order, as long as those checklists haven't been completed yet. You don't need to go into each checklist and update the vendor manually.

**Tip:** If a vendor change happens mid-job, reassign the work order and the open checklists follow automatically. Completed checklists are left as-is since that work was already done by the original vendor.

### **Deleting a Work Order Releases Its Checklists**

When a work order is deleted, Sytewise detaches all linked checklists from it. The checklists themselves are not deleted. They go back to being unlinked fixture checklists, available to attach to a different work order if the work is being re-issued under a new PO or to a new vendor.

**Tip:** If a work order needs to be cancelled and reissued instead of being reassigned, delete the original WO and the checklists will free up automatically. Then create the new work order and attach them fresh. No need to recreate the checklists from scratch.

### **Removing a Single Checklist from a Work Order**

You don't have to remove the whole work order to unlink a checklist. On the work order detail page, the **Linked Checklists** table has a delete icon next to each checklist. Clicking it removes

the link between that checklist and the work order, setting the checklist free to be attached elsewhere. The checklist itself, and all progress on it, is preserved.

**Summary: Attached vs. Direct**

Situation	Best Approach
Work tied to a PO or vendor invoice	Attach to work order
Multiple fixtures one vendor one job	Attach to work order
Informal task, no PO involved	Send directly from fixture
Instructions to internad staff, no WO	Send directly from fixture
Quick one-off inspection checklist	Send directly from fixture

# Adding Parts to Fixtures and Why It's Worth Doing Right

A fixture in Sytewise is more than a name on a list. It's a container for the actual equipment that makes a space work: the controllers, panels, processors, cameras, access points, HVAC units, or whatever physical components live inside that fixture's scope. Parts are how you get that equipment into the record, and tracking parts is how the record becomes genuinely useful over time.

This article covers every way to add parts to a fixture, how to use the library system to make repetitive builds fast, and why the investment in building out accurate part records pays off every time something breaks, gets replaced, or needs to be reported on.

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## Why Track Parts at All

Before getting into the how, it's worth saying a word about the why, because this is the step many teams skip and later wish they hadn't.

When a fixture has documented parts, every work order that touches that fixture tells a more complete story. The technician arriving on-site sees exactly what's installed, where each component is located, the part number, manufacturer, model, and installation date. No guesswork, no calling around to figure out what brand of controller is in the rack.

Status tracking at the part level is where things get even more useful. Each part carries a green or red status. Green means operational. Red means it's a problem. When parts go red, the fixture's overall status reflects it, which feeds into survey reports, work order triggers, and dashboard counts. Over time, the history of which parts went red and when becomes a maintenance record. That record tells you which components fail most often, which fixtures need the most attention, and whether a pattern of failure suggests a systemic issue rather than random bad luck.

For AV integrators, the parts record is essentially the as-built documentation for the installation, structured in a way that survives vendor transitions, staff turnover, and the general amnesia that tends to accumulate over years of managing a complex system.

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## Finding the Parts Section on a Fixture

Open any fixture from the property detail page or from the Fixtures list. The fixture detail page shows a map or floor plan on the left and a column of cards on the right. The **Parts in Fixture** card is where all part management lives.

The card has a small toolbar at the top with buttons for **Save**, **Clone**, **Library**, and **New Part**, plus quick-action buttons for **Check All** and **All Green**. The part list loads below. Each part appears as a row with its part number, position, description, and a status indicator.

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## Adding a Part by Hand

Click **New Part** to open the part entry modal. The modal has two tabs: **New Part** and **Add From Library**. New Part is the one you want for entering a component from scratch.

## Required Fields

**Part No (Serial No)** is required and must be unique within the fixture. This is the identifier you'll use to track this specific component. Use the actual part number, serial number, or a structured internal identifier, whatever makes sense for your workflow. Just make it meaningful because it's what you'll be searching and reporting on.

**Description** is required and is the plain-language name for this part. "Left Audio Processor," "Rack Controller Unit 2," "East HVAC Compressor." Keep it descriptive enough that someone unfamiliar with the installation understands what they're looking at.

## Optional Fields That Are Worth Filling In

**Position** is a short field (up to 12 characters) for noting where this part lives within the fixture. "Rack 1," "Left Wall," "Bay 3," or coordinates if you're working with a structured grid. Position makes the parts list readable at a glance and helps anyone walking into the space orient themselves quickly.

**Manufacturer** and **Model Number** round out the identification of the part. These fields are what connect a part record to a real-world product, which matters when you need to reorder, file a warranty claim, or find a compatible replacement.

**Installed Date** defaults to today but should reflect the actual installation date if you're backfilling records. This is the starting point for warranty tracking and age-based maintenance planning.

**Warranty Expire Date** and **Warranty Description** are there if you want to track coverage. A fixture with expiring warranties worth thousands of dollars is worth flagging before those dates pass.

**Table Details** is a flexible free-text field that displays as a structured table on the part record. Format it as one item per line with comma-separated label and value pairs. Use it for firmware versions, configuration details, IP addresses, calibration values, or any structured technical data that doesn't have a dedicated field. It's flexible by design and useful for capturing the specifics that matter for your particular type of equipment.

Click **Save** and the part is added to the fixture. Its status is set to green (operational) by default and a creation entry is written to the part history log.

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# Cloning a Part

When you have multiple identical or nearly identical components in the same fixture, cloning is significantly faster than entering each one by hand.

Select the part you want to clone by checking its checkbox in the parts list. With exactly one part selected, the **Clone** button in the toolbar becomes active. Click it.

The clone modal asks for two things: a new **Position** (optional) and a new **Part No** (required). Every other field, description, manufacturer, model, all the technical specifications, copies exactly from the original. The installation date is set to today and the status is set to green.

This is the right tool when you're documenting a row of identical display panels, a bank of matching controllers, or any configuration where the components share the same specs but need individual identifiers. Clone the first, give each copy a unique part number and position, and you've built out the full inventory in a fraction of the time it would take to enter each record separately.

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# Adding Parts from the Library

The Library is where the real portfolio-scale efficiency lives.

## What the Library Is

A library item is a saved snapshot of a part record, stored at the account level and available to any fixture across any property in your portfolio. It captures every field: part number, description, manufacturer, model, position, all technical specifications, and any structured detail data. You create a library item once and apply it to as many fixtures as you need, each time generating a fresh part record with the stored specifications and whatever installation date you set for that specific deployment.

This is the feature that transforms the difference between managing five identical fixtures and managing five hundred of them. The specs are defined once. Every fixture that uses that component type gets its part records from the same source.

## Saving a Part to the Library

Before you can use the library, you need to save something to it. In any fixture, select one or more parts by checking their checkboxes. Click the **Library** button in the toolbar. The modal asks for a **Library Title**, up to 24 characters. Give it a name that will make sense when you're searching for it from a completely different fixture six months from now. "Samsung SB-1 Controller v2.3" is more useful than "Controller."

Click **Save** and the part is stored in the library with its complete field data serialized and ready to redeploy.

## Applying a Library Item to a Fixture

On any fixture, click **New Part** and switch to the **Add From Library** tab. A list of all saved library items in your account appears as radio buttons. Select the one you want, set the **Parts Install Date** for this specific installation, and click **Add From Library**.

A new part record is created with all the stored specifications from the library item and the installation date you specified. The part is independent from the library item from that point forward. Changes to the library item don't affect parts already deployed from it, and changes to the deployed part don't affect the library item or other fixtures that used it.

# Where the Library Shines

Consider a portfolio of retail locations, each with the same model of HVAC unit, or a chain of venues all running the same AV platform. The first time you document that equipment at one location, you build the parts records carefully: correct part numbers, model numbers, firmware versions, all technical details accurate and complete. You save those parts to the library.

At every subsequent location, you open the fixture, click New Part, switch to Add From Library, select the part, set the install date, and move on. The record is as complete and accurate as the first one without any additional data entry. Multiply that across dozens or hundreds of locations and the time savings are substantial. More importantly, the consistency is perfect. Every location's records describe the same equipment in the same way, which makes cross-portfolio reporting and maintenance planning dramatically cleaner.

The library also serves as an institutional knowledge base. If a particular component type has specific technical details that a new team member wouldn't know off the top of their head, those details live in the library item and deploy with every new installation automatically.

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## Managing Part Status

Part status is the real-time health indicator for each component. Green means operational. Red means it needs attention.

You change part status directly in the parts list on the fixture page. Each part has a colored status indicator (green circle for operational, red for problem). Toggle the checkbox next to any part to flip its status. You can change multiple parts at once and then click **Save** to write all the changes to the database in a single operation.

Two quick-action buttons at the top of the parts section make bulk updates easier:

**All Green** sets every part in the fixture to operational status at once. Useful after a service call where everything was repaired or replaced.

**Check All** selects all parts, which is the first step if you want to perform any bulk action on the whole set.

When parts go red, the fixture's overall status score recalculates automatically. A fixture with three working parts out of five shows a different health status than one where all five are green. Those status calculations feed into property reports, survey summaries, and the dashboard fixture counts, which means part-level accuracy translates directly into portfolio-level visibility.

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## Part History

Every part carries a log of changes. In the edit modal for any part, a **Show Part Log** link at the bottom expands a table showing every recorded event for that part: when it was created, when its status changed, when its part number was updated, and who made each change. Each entry includes the date and the admin user responsible.

This history is also available as a dedicated print view from the part detail page, showing the 100 most recent log entries alongside the part's full specifications.

The history is what turns a part record into a maintenance document. A part that has gone red three times in eighteen months is telling you something. A part that's been green since installation day is telling you something different. You can't have that conversation without the log.

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## Reference Articles

If your account has the Reference module enabled, parts can be linked to reference articles stored in the system. Reference articles are technical documents, installation guides, configuration references, or any documentation relevant to a specific component type. They link at the model number level and appear on the part detail page and in the fixture print report.

For AV integrators managing complex equipment, linking reference articles to part records means the technical documentation travels with the equipment record rather than sitting in a folder somewhere that only one person knows about.

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# A Note on the Display Grid Module

If your account uses the Display Grid module for managing LED display systems and media walls, the part form includes additional fields for controller and cabinet components: firmware versions, FPGA and Valens revisions, resolution, grid location coordinates, IP addresses, and LED batch codes. These fields support a structured hierarchy where cabinet panels are linked to their parent controller, and the whole configuration can be built using the grid builder tool or imported from CSV files exported from the display manufacturer's software.

The library system is particularly valuable for Display installations because the technical specifications for a given display configuration are extensive and consistent across deployments. Save the controller and cabinet specs to the library once and every subsequent installation of the same display system starts with a complete, accurate part record.

# Creating and Managing Fixtures

A fixture is the unit of work in Sytewise. Properties hold trades, trades hold fixtures, and fixtures are where the actual equipment lives: the lights, the HVAC units, the AV systems, the access points, the cameras, or whatever physical asset you're tracking and maintaining. Getting fixtures built accurately is what makes work orders, surveys, checklists, and reports meaningful. This article covers every way to create a fixture, how to delete one, and what to think about before you do.

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## Finding the New Fixture Form

Fixtures are created from the property detail page. Open the property, navigate to the trade where the fixture belongs, and look for the **New Fixture** button in the fixtures section. The modal that opens has two tabs: **New Fixture** for building one from scratch and **Add From Library** for deploying a saved template. There is also a separate **Import** option for bulk creation from a CSV file, and a **Clone** option for copying an existing fixture within the same property.

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## Creating a Fixture by Hand

The New Fixture tab has four fields.

**Fixture Name** is required and should be short and specific. The form even suggests the format: "Pole Light 1" or similar. This name appears in the fixture list, in work orders, in surveys, and in reports. A name that makes sense in isolation, without needing the surrounding context to interpret it, is worth the extra thought up front.

**Description** is also required and gives you room to add more detail. Where the name is a label, the description is a sentence. "Northwest corner LED pole light on Circuit 4" tells the next technician something useful.

**Type** is a dropdown populated from the fixture types configured in your account. Fixture types represent categories or classifications for your equipment, such as height classes for outdoor lighting or equipment categories for AV systems. If the type you need isn't in the list, it needs to be added by an account administrator before you can use it.

**Vendor** is pre-filled with the default vendor for this property/trade combination. If a different vendor is responsible for this specific fixture, search by name and select the right one.

Click **Save** and you land on the fixture detail page. From there you can add parts, position the fixture on the map or floor plan, add images, and assign it to a group. The fixture starts with zero parts, a blank status, and its position set to the property's center coordinates. Repositioning it right away is a good habit before the list gets long.

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## Positioning a Fixture

Every fixture needs a position on the property map so it can be identified visually alongside its neighbors.

**GPS-based based trades** use Google Maps. The fixture marker starts at the property's center point and can be dragged to the correct location. Click and hold the marker on the map and move it to where the fixture actually lives. The coordinates update automatically when you drop it.

**Floor plan based trades** use an uploaded image of the building or site layout instead of a map. The fixture marker appears on that image and is dragged into position the same way. This mode is common for interior spaces where GPS coordinates don't distinguish one room from another.

Which mode a trade uses is set at the trade level on the property. All fixtures within a trade share the same positioning system.

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# Creating a Fixture from the Library

If a fixture you need to add is the same as or very similar to one you've already built and documented elsewhere, the library saves you from rebuilding it from scratch.

Click **New Fixture** and switch to the **Add From Library** tab. A list of saved fixture library items appears as radio buttons. Each item represents a complete fixture snapshot including all its parts, specifications, and technical detail. Select the one that matches what you're installing, set the **Parts Install Date** (which becomes the installation date recorded on every part created from the template), and click **Add From Library**.

The system creates the fixture and all its parts in one operation. Every part field from the library item, part number, description, manufacturer, model number, firmware versions, and all technical detail fields, is copied to the new fixture. The install date you entered is applied to each part record.

The **Include Groups** checkbox is worth knowing about. If the library item was part of a group when it was saved, checking this box recreates that group association on the new fixture. Leave it unchecked if you want the fixture to start ungrouped and organize it later.

After creation you land on the fixture detail page with a fully built part inventory already in place. The main thing to do immediately is position the fixture on the map, since it will be sitting at the property center point until you move it.

## Saving a Fixture to the Library

To save a fixture to the library, go to the fixture detail page and click the **Library** button in the parts section. Enter a library title up to 24 characters and click Save. Everything is captured: the fixture definition, every part record with its full specifications, wiring diagrams, and group associations. That snapshot becomes available immediately on the Add From Library tab for any fixture on any property in your account.

The library title is what you'll be selecting from a list later, so make it descriptive. "Standard 20ft LED Pole w/ Driver" or "Samsung 3x4 ION Wall v2.1" will serve you better than something generic.

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## Cloning a Fixture

Cloning creates an exact copy of an existing fixture within the same property. It's the right tool when you have multiple identical or nearly identical fixtures at the same location and don't want to enter the same specifications repeatedly.

Select the fixture you want to clone from the property fixture list (the checkbox next to the fixture row), then click **Clone**. A small modal asks for the new fixture name. That's it. Everything else, description, type, vendor, all parts with their full specifications, and group memberships, copies from the original.

Cloned parts are initially marked with "CLONE" in the part number, signaling that they need to be updated with the actual serial or part numbers for the specific units being documented. The fixture drops at the property center point, so reposition it on the map as soon as it's created.

Clone is different from the library in one important way: cloning works within a single property in the moment, while the library persists configurations for use across properties and over time. For adding the second of two identical fixtures on the same site, clone is faster. For deploying the same fixture configuration across twenty properties, the library is the right tool.

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## Importing Fixtures from a CSV File

When you have a large number of fixtures to add to a property at once, the import tool lets you upload them all from a spreadsheet.

The import modal accepts a CSV file with one fixture per row. The columns, in order, are:

1. **Fixture Title** (required, minimum three characters)
2. **Fixture Description** (defaults to the fixture title if left empty)

3. **Total Parts in Fixture** (required, between 1 and 50)
4. **Part Number** (defaults to the fixture title if left empty)
5. **Part Description** (defaults to the part number if left empty)
6. **Part Position** (optional)
7. **Part Manufacturer** (optional)
8. **Part Model Number** (optional)
9. **Fixture Height in Feet** (required, as a whole number)

A sample CSV file is available to download directly from the import modal so you can see the exact format before building your file. The import also has a checkbox for "First row is a header row, so ignore it" in case your spreadsheet includes column headers.

After you upload the file, Sytewise shows you a summary table of what it parsed. Any rows with errors are highlighted so you can correct them before committing. If everything looks good, click **Finish Import** to create all the fixtures at once. All imported fixtures start at the property center point and will need to be repositioned.

The import is best suited for properties with a large number of uniform fixtures where the basic data (name, type, part number) is already organized in a spreadsheet. It creates one part per fixture based on the single row of part data provided. For fixtures with multiple parts or complex specifications, adding parts individually after import gives you more control.

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## Fixture Groups

Fixtures can be organized into groups within a property. Groups are useful for representing physical clusters of equipment: a bank of lights on a single circuit, the displays on one wall of a venue, or the HVAC units serving a specific zone.

To add fixtures to a group, select them using the checkboxes in the fixture list and open the group modal. You can either create a new group name or add the selected fixtures to an existing group. A fixture can only be in one group at a time.

Group names are stored in lowercase with spaces and dashes converted to underscores. Keep them short and descriptive since they appear as labels on the property map.

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# Deleting a Fixture

Deleting a fixture is done from the fixture list on the property detail page. Select the fixtures you want to remove using their checkboxes and click the delete action. Sytewise uses soft deletion, meaning the fixture record is marked inactive rather than permanently erased. The fixture disappears from the active list but its history, logs, and associated records remain in the database.

A few things to know before deleting:

**Parts are not deleted.** The parts inside a deleted fixture become orphaned in the database. They don't disappear, but they're no longer accessible through the fixture's detail page. If the part records contain important documentation or history, consider whether the fixture should actually be deleted or simply left inactive.

**Work orders and checklists are not automatically cleaned up.** Any open work orders or checklists that referenced the fixture remain in the system but lose their connection to an active fixture record. Close out or reassign those items before deleting the fixture if clean records matter.

**Group memberships are cleaned up.** When a fixture is deleted, its group association is also marked inactive, so it won't leave behind a ghost entry in the group.

**There is no built-in undelete.** The soft-delete approach means recovery is technically possible at the database level, but there is no UI to restore a deleted fixture. Delete if you are confident that you're done with the fixture, such as being replaced or abandoned.

The practical guidance: if a fixture is being replaced, update its parts to reflect the new equipment rather than deleting it. The fixture record and its history are more valuable than a clean list. Delete when a fixture genuinely no longer exists at the property, not just because it was serviced or upgraded.