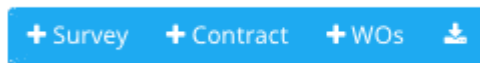


Creating A Work Order

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:

Create A New WOs



☒ Status: Complete (will not become overdue).

Subject / Title

The West End WO

Order Date

2021-06-25

Due Date

2021-07-02

Vendor

Lights Galore

Select a Contract

The West End-HVAC Contract Jun 25 2022

Costs optional

Reference No.

Account Number

+ Add Line Item

Labor

85.00

Parts

167.45

Total

252.45

Select Fixtures

Already in a WO

Every

None

☒ 20 Ton HVAC Roof unit, main

4/4

☐ Roof 10 Ton Unit 1 Roof HVAC unit

3/3

☒ Roof 10 Ton Unit 3 Roof HVAC unit

0/3

Special Instructions / Description

Select contact to receive the work order.

☐

☐

Close

Save

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 occurs 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.

The screenshot shows a web form for entering work order costs. At the top, there is a dropdown menu labeled 'Select a Contract' with a blue link icon. The selected option is 'The West End-HVAC Contract Jun 25 2022', marked with a yellow circle 'G'. Below this is a section titled 'Costs optional' with a label 'Reference No.' and a text input field containing 'Account Number', marked with a yellow circle 'H'. To the right of the input field is a green button labeled '+ Add Line Item'. Below the input field is a table with two rows: 'Labor' with a value of '85.00' and 'Parts' with a value of '167.45'. Each row has a red 'X' icon to its right. A yellow circle 'I' is placed over the 'Parts' row. At the bottom, there is a 'Total' label and a text input field showing the value '252.45'.

Category	Value
Labor	85.00
Parts	167.45
Total	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.

Revision #1

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