

Creating a Work Order

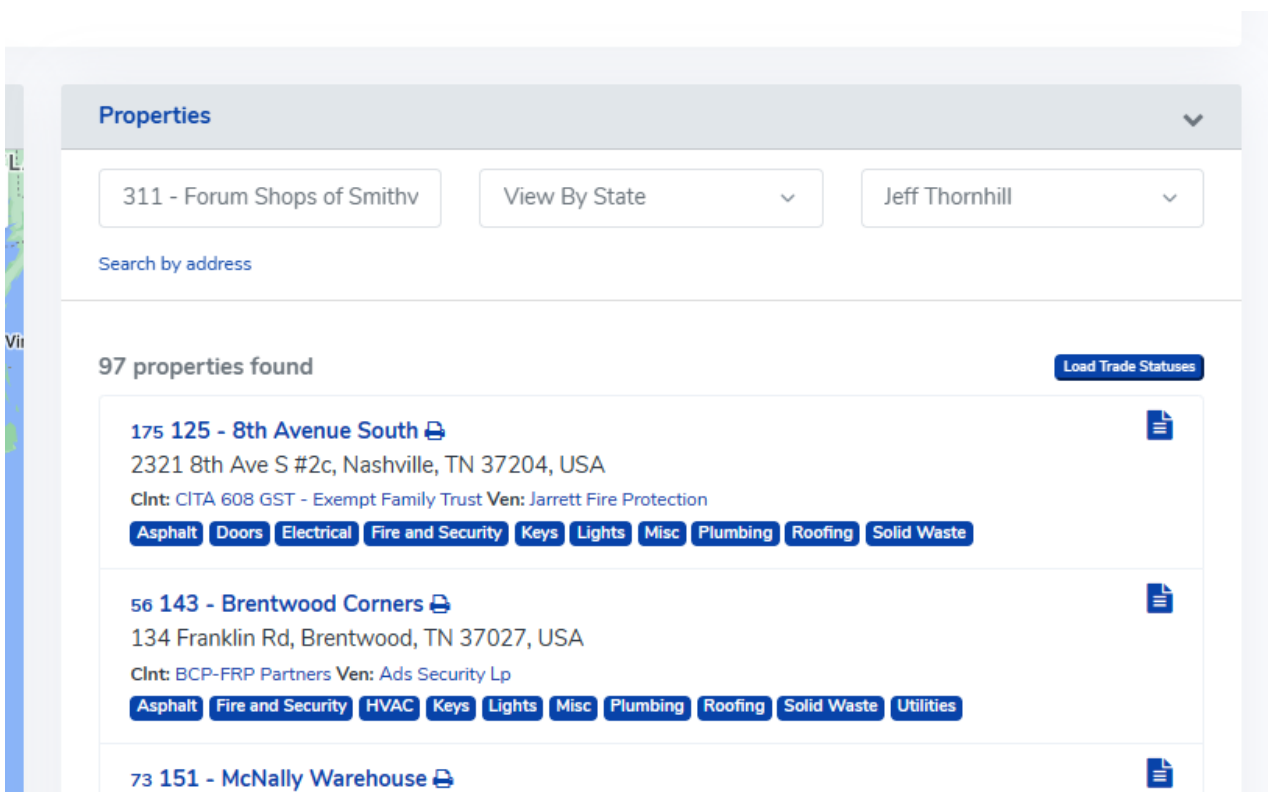
Work orders are easy to create in Sytewise. Each Work Order is specific to a Property and a Trade. Watch this video or check out the step-by-step instructions below.

Create a Work Order

- Select a Property and Trade
- Make Sure the Fixture is selected as Needing Service.
- Open the Work Order Menu
- Add the Title/Description
- Select the Due Date
- Select the Vendor
- Select the Fixture/Fixtures
- Enter the Instructions to your Vendor
- Select the Correct Emails For Delivery and Click Save
- See New Work Order Number
- Verify email has been delivered

Select a Property and Trade

Choose a Property by selecting it in either the Dashboard or Property Page list of Properties.



The screenshot displays the 'Properties' section of the Sytewise interface. At the top, there's a header 'Properties' with a dropdown arrow. Below it, three filters are visible: '311 - Forum Shops of Smithv', 'View By State' with a dropdown arrow, and 'Jeff Thornhill' with a dropdown arrow. A 'Search by address' link is positioned below these filters. The main content area shows '97 properties found' and a 'Load Trade Statuses' button. Three property entries are listed:

- 175 125 - 8th Avenue South** (with a location pin icon)
2321 8th Ave S #2c, Nashville, TN 37204, USA
Clt: CITA 608 GST - Exempt Family Trust Ven: Jarrett Fire Protection
Trades: Asphalt, Doors, Electrical, Fire and Security, Keys, Lights, Misc, Plumbing, Roofing, Solid Waste
- 56 143 - Brentwood Corners** (with a location pin icon)
134 Franklin Rd, Brentwood, TN 37027, USA
Clt: BCP-FRP Partners Ven: Ads Security Lp
Trades: Asphalt, Fire and Security, HVAC, Keys, Lights, Misc, Plumbing, Roofing, Solid Waste, Utilities
- 73 151 - McNally Warehouse** (with a location pin icon)

Dasl

Misc

Plumbing

Roofing

Solid Waste

Utilities

+

>

>

Last Name

+

>

Surveyor

Make Sure the Fixture/Parts are selected as Needing Service

Once on the property page, look in the list of fixtures to find the right Fixture and make sure the toggle switch shows as red. This indicates that the part nees service. If this fixture is part of a Survey, the Surveyor may have turned the service indicator from Green to Red Already. Once all of the Fixtures you wish to place on a work order have the status indicator as red, you can return to the Property Menu.

+ Fixture

Group

Clone

+ Library

☒ Check All

Suite 100 Men's Room Sink

[0-7ft] Bathroom Sink

V: Jeff Thornhill

[admin] Mon Mar 13, 2023 04:17:16 PM

Import Fixtures

Inherit Property Vendor

Open the Work Order Menu

In the upper right corner you will find a button for Work Order / Purchase Order. Click this button to open the Work Order form.

Dashboard > Properties > 311 - Forum Shops of Smithville - Training Property

+ Survey

+ Contract

+ WOs POs

Enter a note and hit return

A note here

2022-06-02 7:10 pm | Jeff Thornhill

Create A New WO's POs

☐ Status: Complete (will not become overdue)

Subject / Title

311 - Forum Shops of Smithville - Training Prop

Order Date

2023-03-15

Due Date

2023-03-22

Vendor

Jeff Thornhill

Costs optional

Reference No.

Account Number

Total

Total Amount

+ Add Line Item

Select Fixtures

✓ All

Every

None

Already in a WO

Suite 100 Men's Room Sink

0/1

✓

Bathroom Sink

Special Instructions / Description

Select contact to receive the work order.

☐ [jthornhill@brooksideproperties.com]

☐ Jeff Thornhill

[jeff.thornhill@comcast.net]

Close

Save

Add the Title / Description

When you open the Work Order form you will notice the Title / Description is prefilled with the name of the property. Enter the Name of the Work Order here. This will become part of the Email that is delivered to your Vendor. To make sure you are able to search easily for this work order later it is good to add words that identify the suite number, trade, and specific fixture if only one. Something like, Suite 100 - Dollar General Men's Room Sink has a Plumbing Leak. For more information on best practices for naming work orders click [here](#).

Subject / Title

311 - Forum Shops of Smithville - Training Prop

Subject / Title

Suite 100 - Men's Room sink has leaky faucet

Select the Due Date

Both Date Fields have dates entered. The Creation Date has the current date. The Due Date is prefilled with one week from the date of creation. Of course, this won't work for every scenario, so replace the prefilled date with the date that works for you. You can select a new date by clicking on the calendar. Or if you are like me, just type the new date in the field. either one works.

Order Date

2023-03-15

Due Date

2023-03-22

Select the Vendor

The default vendor for this trade and this property will already be entered into the Vendor field. This may be the vendor you want to use. In that case, don't do anything. If you want to change

the vendor for this particular work, just start typing the name of the vendor in the Vendor field. You will want to highlight the prefilled vendor name and then just start typing. A list of vendors will appear. As you continue, the list of vendors will shorten. Keep typing until you see your vendor and then select with your cursor.

Vendor

Jeff Thornhill

Select the Fixtures / Fixtures for this Work Order

This work order is going to be sent to a particular Vendor so, even if there are several fixtures that need repair, only select the fixtures that are going to be serviced by the vendor you've selected for this work order. You can click on the None button at the top right of the Work Order Form to deselect all Fixtures. You can click on the All button to show all the Fixtures in this trade, even if their status hasn't been changed from red to green. Click the box to the right of each fixture to add that fixture to this work order.

Select Fixtures

✓ All

Every

⊗ None

Already in a WO

● Suite 100 Men's Room Sink
Bathroom Sink

0/1



Enter the Instructions to your Vendor

This is where you can get very specific about the work you want performed. Don't leave anything to interpretation. Get specific with your instructions so your vendor knows exactly how you want the work performed and what the end result needs to be. If you have drawings or plans that would be helpful, you can attach them to the fixture and the Vendor will receive them with the Work Order.

Special Instructions / Description

Hey Guys, The left Men's Room sink has a leaky faucet. Try to change the valve and if that doesn't work, replace the fixture. Check in with Jerry, the manager to let them know

Select the Correct Emails for Delivery and Click Save

Every Vendor can have multiple contacts. Every contact with an email address in their profile will be listed just below the instructions. You can send the work order to multiple people or just one person. Here's where you select the recipients for this particular work order. Once you've selected all recipients, just click Save and your email is on the way.

Select contact to receive the work order.

- ☐ [jthornhill@brooksideproperties.com]
- ☒ Jeff Thornhill
[jeff.thornhill@comcast.net]

Close

Save

See the new Work Order Number

Once the Work Order Form disappears you will see the new Work Order number in the banner and a message regarding the success of the email delivery. Click on the work order number to see the Admin version of the Work Order.

Work Order 5612 Created.

Go to the Work Order to send an email to the vendor with a link to the details.
Create A Bill

Message sent to jeff.thornhill@comcast.net.

Verify Work Order Email was Delivered

Once you click Send on the work order, you will get an automatic notice if the email was successfully delivered. If you need to see a verification of the email, look at the bottom of the work order page and you will see a list of every email that was delivered on behalf of this work order.

Email Log				
Subject	From	To	Message	Time Sent
311 - Forum Shops of Smithville - Training Property WO	noreply@mapalight.com	jeff.thornhill@comcast.net		Mar 15, 2023 3:07 PM CDT

Revision #8

Created Fri, Mar 5, 2021 12:26 AM by Jeff Thornhill

Updated Wed, Mar 22, 2023 7:22 PM by Jeff Thornhill