Creating and Managing Work Orders

A work order is the engine of property operations in Sytewise. It captures what needs to be done, who's doing it, which fixtures are involved, what it costs, and proves it all happened when the job is done. This article walks through every step from creating the work order to closing it out, including how to reassign it, attach checklists, and add line items along the way.

Starting a Work Order

Work orders are created from the property detail page. Navigate to the property, find the trade you're creating the work order for, and click the **New Work Order** button. The work order modal opens and immediately gets to work on your behalf.

The Work Order Modal

The modal is organized into two columns. The left side handles the job details. The right side handles fixtures, instructions, and email configuration.

Subject and Dates

Subject is auto-filled with the property name and "WO" as a starting point. You'll almost certainly want to change this to something that describes the actual work. Keep it specific enough that it means something six months from now when it shows up in a report. Four characters minimum.

Order Date defaults to today. Change it if you're backdating or scheduling in advance.

Due Date defaults to five business days out from the order date. Adjust it to match the actual deadline. This is the date the system uses to flag the work order as overdue if it hasn't been completed.

Work Start Date is optional. Check the **Include a Work Start Date?** checkbox and a second date field appears. Use this when the vendor needs to know when they can begin the work, separate from when it needs to be done.

Vendor

The **Vendor** field is pre-filled with the default vendor assigned to this property/trade combination. If the right vendor is already there, leave it. If you need someone different, start typing a vendor name and the autocomplete will find them. As soon as a vendor is selected, their contact emails load automatically in the email section below, ready to be checked or unchecked.

If the vendor field shows no name or the wrong name, it means either no default vendor is set for this trade or the default needs to be updated on the property record. See the vendor setup article for how to assign default vendors to property trades.

Contract and Costs

If the property has active contracts, a **Select a Contract** dropdown appears. Selecting a contract auto-fills the **Reference Number** with the account number from that contract and may pre-populate the **Total** field with the contract's monthly fee. Both are editable.

Add Line Item lets you build out a cost breakdown directly in the modal. Each line item has a description, amount, and total. Add as many as the job requires. Line items can also be added and edited after the work order is created, so don't let an incomplete cost picture hold up the process.

Fixtures

The right column shows every fixture in the property/trade. This is where a common question comes up: do you have to flag a fixture for maintenance before you can add it to a work order?

No. Every fixture in the property/trade is available to add to a work order regardless of its current status. The colored status indicator next to each fixture (green for all items working, yellow or red for partial or full outage) is informational. It tells you the state of that fixture at a glance, but it doesn't gate whether you can include it in the work order. If a fixture needs attention, add it. If you want to include fixtures as part of a routine service visit even though nothing is broken, add them. The choice is yours.

Click **All** to select every fixture at once. Click **None** to deselect. Or check individual fixtures one by one. Fixtures highlighted in green are already included in another open work order, which is useful context before you add them to a second one.

Special Instructions and Files

Special Instructions is a free-text field for anything the vendor needs to know before they show up. Access codes, safety requirements, specific contacts to call on arrival, scope details that don't fit in the subject line. It all lands in the email the vendor receives.

Add A Zip File lets you attach a reference document, drawings, spec sheet, or any supporting file that should travel with the work order.

Checklists

If fixtures are selected and existing checklists are available for those fixtures, a checklist chooser appears below the fixture list. Check any checklists you want to attach to this work order. Attached checklists are included in the vendor email as direct links. The vendor opens the email and has both the work order and the checklist tasks in the same message.

If the checklists you need don't appear here, it's likely because they haven't been created yet or they're assigned to a different vendor. Checklists can also be linked to the work order after it's created.

Email Recipients

Vendor Contacts appear as checkboxes showing each contact on file for the selected vendor with their name and email address. Check the contacts who should receive this work order. If the vendor has no contacts in the system, a warning appears here. That's your cue to go add contacts to the vendor record before sending.

Admins to receive the WO emails lists the admin users in your account. Check any who should receive a copy.

Include Management in WO Emails is a checkbox that adds property management contact information to the body of the email sent to the vendor, useful when the vendor may need to reach someone on-site.

Saving

Click **Save** and the work order is created. You land on the work order detail page where the full record lives.

The Work Order Detail Page

The work order detail page is where everything about the job is visible and manageable. It's worth knowing what's where.

The header shows the work order number and subject. Superusers can click the pencil icon to edit the subject after creation.

The left column shows the key metadata: order date, start date (if set), due date or completion date, the admin user assigned, the associated contract, the fee, account number, and any bills linked to this work order.

The middle column is the notes section. Add notes here at any point during the life of the work order. Notes are timestamped and attributed to whoever adds them. Use notes to document conversations with the vendor, status updates, changes in scope, or anything relevant to the job. These notes also appear in the property print report, so they contribute to the permanent record of the property.

The right column shows the vendor, admin contacts, and client (if one is assigned to the property).

Editing the Work Order

While the work order is open, an edit form sits below the header. From here you can update the subject, instructions, assigned user, contract, fee, order date, start date, due date, and account number. Click **Save** to apply changes.

Fixtures, Line Items, and Checklists on the Detail Page

Fixtures appear in a table below the edit form showing the fixture name, part number, description, and status. Each row expands to show individual parts when clicked. Fixtures are added during creation and are shown here as a read-only reference. The fixture table updates with status outcomes when the vendor submits their report through the vendor portal.

Line items appear in an editable table. Add new items using the input row at the bottom: enter a quantity, description, amount, and line total, then click the plus button. Edit existing items by clicking the pencil icon on any row. The fields become editable in place. Press Enter or click save to commit the change. Delete items with the X icon. This makes it easy to update costs as the job scope evolves.

Linked Checklists appear in their own section below the fixtures. If you didn't attach checklists during creation, you can add them here. The dropdown shows all checklists that are eligible for this work order, meaning they share the same vendor, property, and trade. Select one from the dropdown and click **Link Checklist**. To remove a linked checklist, click the trash icon next to it and confirm.

Sending the Work Order to the Vendor

When you're ready, click **Send Work Order**. This triggers the email to all checked vendor contacts and admin users. The email includes the work order details, the vendor link for accessing the portal, any instructions, fixture information, attached checklist links, and line item costs.

The **Email Log** section at the bottom of the work order page records every email sent: who it went to, when, and whether it was delivered successfully. Green rows are successful sends. Red rows are failures. This log is included in the work order print report, so you always have documented proof of when the vendor was notified.

The Send Work Order button only appears if the vendor has a valid email address on file. If it's missing, go to the vendor record and add contact information first.

Reassigning the Work Order to a Different Vendor

Vendors change. Schedules conflict. A better option becomes available mid-job. Reassigning a work order is straightforward and the system handles the downstream effects automatically.

On the work order detail page, find the vendor section in the right column and click **Change Vendor**. An autocomplete field appears. Search for the new vendor, select them, and their contacts load as checkboxes. Check the contacts who should receive the reassignment email. You can also update which admin users receive a copy.

Click **Update Vendor** when ready. Several things happen at once:

The work order vendor record is updated. The old vendor contacts are deactivated. The new vendor contacts are recorded. A new email goes out immediately to all selected recipients with the full work order details. And every checklist linked to this work order that hasn't been completed yet is automatically updated to the new vendor so the checklist assignments stay in sync.

Updating admin contacts only (without changing the vendor) uses a separate **Update Admin Contacts** button and does not send a new email.

Completing and Closing a Work Order

There are two ways to mark a work order complete.

Mark complete at creation by checking the **Status: Complete** checkbox in the creation modal. This is useful when you're creating a historical record for work that already happened.

Close from the detail page using the **Close Without Changes** button, available to superusers. This marks the work order complete, records the current date and time as the completion date, and adds an automatic note logging who closed it. Use this when the work is done and no fixture status updates need to be recorded from the vendor portal.

If a work order needs to be reopened after being closed, the **Reopen Work Order** button appears in place of the close button on completed work orders. Clicking it clears the completion date and puts the work order back into the active queue.

Survey Results and Fixture Status

It is worth mentioning here just how a survey impacts the which Fixtures show up as needing service in the work order modal. When a surveyor marks a part as Off during a survey, Sytewise does not just note it in the report and move on. That status change flows directly into the fixture record itself, which means the fixture is now flagged as needing attention.

Here is why that matters when you go to create a work order. On the property page, when you open the work order form and load the fixture list, fixtures with parts marked Off surface at the top so they are easy to find and select. The surveyor's findings in the field become your ready-made punch list in the office.

This is the handoff point between the survey workflow and the work order workflow. The surveyor documents the condition. The status updates automatically. You create the work order with the right fixtures already flagged and waiting for you.

No manual cross-referencing, no sticky notes, no trying to remember what the surveyor said about the third floor AV rack. The system connects the dots.

Keeping It Organized

A few habits make work orders more useful over time.

Write descriptive subjects. "HVAC Service Visit" is far more useful in a report six months later than "WO 142." The subject appears in property reports, work order search results, and vendor emails. Make it count.

Use notes generously. Every status update, vendor conversation, or scope change is worth a note. The note history on a work order tells the story of the job. When a question comes up about what happened, the notes are the answer.

Attach checklists whenever the job involves documented work. A completed checklist attached to a work order gives you photographic evidence, signed acknowledgment, and a step-by-step record of what was done. That combination is hard to argue with.

Set accurate due dates and update them when they change. The overdue indicator on the work order detail page and the dashboard count of open work orders both depend on due dates being realistic. A work order set due two years from now is invisible to the system's urgency tracking.

Revision #3

Created Fri, Mar 5, 2021 12:28 AM by Jeff Thornhill

Updated Mon, Jun 1, 2026 7:07 PM by Jeff Thornhill