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.

Revision #1

Created Fri, May 15, 2026 4:11 PM by Jeff Thornhill

Updated Fri, May 15, 2026 4:15 PM by Jeff Thornhill