

# Reference Articles

A technician arrives at a property to service a piece of equipment they have never worked on before. The work order is in their phone. The fixture is in front of them. What they need next is the manual, the wiring diagram, the firmware update procedure, and maybe a quick video showing the service sequence for this specific model. In most operations, finding all of that means a phone call, an email chain, or a search through a shared drive that nobody has organized in two years.

Reference articles in Sytewise solve that problem by putting the documentation exactly where the technician is already looking. Write the article once, link it to the model number, and every fixture across your entire portfolio that contains that equipment surfaces the article automatically. The technician on site opens their fixture record and the documentation is right there, whether it is their first time with that equipment or their fiftieth.

This article covers how to create and build a reference article, how to link it to your fixtures by model number, and how that single article becomes a tool for both field support and portfolio-level planning.

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## Getting to Reference Articles

From the left navigation menu, click **Reference**. The Reference Articles page shows your full library of articles in a searchable, paginated table. The table shows each article's title, the model number it is associated with, and when it was created.

To find an existing article, type at least three characters of the title or model number in the search field and select from the autocomplete results.

The Reference module must be enabled on your account. If you do not see Reference in your navigation, contact Sytewise to have it added.

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## Creating a New Reference Article

Click **Create A Reference Article**. Sytewise creates a blank article record and opens the article editor immediately. The article is titled "New Article" by default. The first thing you should do is give it a real name.

# Setting the Title

At the top of the editor, click the title to make it editable and type the name of the article. Be specific. "Samsung IF Series LED Display" or "Lennox KGA 12.5 Ton RTU Service Guide" will be easy to find and understand in a list. "Display Docs" will not.

The title is also what appears when a technician sees the article linked from their fixture or part record, so it should be clear enough to identify the content at a glance.

# Setting the Model Number

Each reference article can be associated with a specific model number. This is not just a label. It is the key that connects the article to every part in your portfolio that shares that model number. Enter the model number exactly as it appears in your parts records. Capitalization and spacing matter because the system uses exact matching when it searches for parts to link.

Setting the model number before you link parts saves a significant amount of manual work, especially on large portfolios where the same equipment is installed across dozens or hundreds of locations.

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# Building the Article Content

The article is built from sections. Each section is a distinct block of content, and sections can be reordered by dragging them after they are created. Click any of the section type buttons at the bottom of the editor to add one.

## Text

The Text section is a rich text editor. It supports headings, bold and italic formatting, bulleted and numbered lists, tables, and links. Use it for:

- Installation and commissioning procedures
- Service and maintenance instructions
- Configuration settings and recommended values
- Troubleshooting guides with step-by-step resolution sequences
- Warranty information and contact details for the manufacturer
- Safety notes and precautions specific to this equipment
- A brief product overview for team members who are new to the model

You can add multiple Text sections to organize long content into logical blocks. A well-structured article might have separate Text sections for Overview, Installation, Maintenance, and Troubleshooting, each with its own content.

## Images

The Images section accepts photo uploads. Use it for product photos, labeled diagrams, before and after photos, and reference photos showing correct and incorrect configurations side by side. Images are stored in Cloudinary and displayed inline in the article. A technician looking at the article on a phone sees the images at full quality without any download step.

## Downloads

The Downloads section lets you attach files for technicians to save to their device. This is where spec sheets, installation manuals, firmware update files, calibration tools, and multi-page PDF documentation live. Files attached here appear as named download links in the article. Each file can be given a descriptive title so the technician knows what they are downloading before they click.

## YouTube

The YouTube section accepts a YouTube URL and embeds the video directly in the article. Manufacturer training videos, installation walkthroughs, maintenance demonstration videos, and product overview clips are all fair game. If the manufacturer has published a service video for this equipment, link it here and it plays inline without leaving Sytewise.

## Embed

The Embed section accepts raw HTML embed code for anything that is not a YouTube video. Use it for Vimeo videos, interactive product documentation, embedded spec comparison tools, or any iframe-based external content the manufacturer or distributor makes available.

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# Linking the Article to Fixtures

An article sitting in the library does nothing on its own. Its value comes from being linked to the actual parts in your portfolio that contain the equipment it covers. There are two ways to create those links.

## Link by Model Number (the fast path)

This is the most important feature in the reference module. Click the **Link Modno** button at the top of the article page. A modal window opens showing all parts in your account whose model number matches the model number you entered on this article. Each matching part is listed with its fixture name, property name, and the model number that triggered the match.

Check the parts you want to link and click to confirm. The article is now connected to every selected part. Those parts, their fixtures, and the properties they live on now surface this article automatically whenever someone accesses that fixture's detail page, print report, or linked documentation.

If you manage fifty retail locations with the same HVAC unit, every one of those units shows up in the model number search. Select all fifty, click link, and the article is connected to the entire fleet in one operation. Every technician who opens any of those fixtures from that point forward sees the article without you having to do anything else.

The Linked Parts table at the bottom of the article page shows the current list of all parts connected to this article: part number, fixture name, and property name. This table is also a useful view of how widely a given equipment model is deployed across your portfolio.

## Linking Individual Parts

Parts can also be linked from the part detail page itself. When you need to connect a specific part to an article and that part's model number does not match the standard model number due to a variant, an import discrepancy, or a legacy naming convention, link it individually from the part record rather than the model number search.

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## Making an Article Public

Each reference article has a unique public URL. This URL works without any Sytewise login.

The **Public** toggle at the top of the article page controls whether the article is accessible at that URL. When public is on, anyone with the link can read the article: technicians in the field, vendors, clients, or anyone else you share the URL with. When public is off, the article content is still linked to parts and visible within the admin portal, but the public URL returns nothing.

Public articles are useful when you want to share documentation with people who do not have Sytewise accounts. A vendor assigned to a work order on a specific fixture can be given the public URL to the reference article for that fixture type, and they have the documentation before they arrive on site without needing portal access.

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## Linking Related Articles

Reference articles can be linked to other reference articles in your library. This creates a Related Articles section at the bottom of each article that makes navigation natural when documentation is spread across multiple records.

Use this when the equipment documented in one article connects meaningfully to another: a controller article linked to the cabinet article it drives, an HVAC unit article linked to the article covering its specific thermostat model, an LED display article linked to the article covering the media player in the same system.

Related article links are bidirectional in appearance: linking article A to article B causes article B to show article A as related as well.

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## The Field Support Value: One Article, Every Technician

The moment an article is linked to a model number and that link is applied to your parts, something changes about how your operation works. Documentation stops living in email threads, shared drives, and the institutional memory of whoever has been at the company the longest. It starts living exactly where the work happens.

A new technician on their first solo service call opens the fixture record, sees the reference article linked to the equipment, and has the installation diagram, the maintenance procedure, the firmware version to look for, and the manufacturer's service video all in one place. They do not need to call the office. They do not need to guess. The knowledge transfers automatically.

For a portfolio of identical installations, this effect multiplies with every location. You write the article once for a display model, a compressor type, a control system, or any other equipment your team regularly works on. From that point on, any technician at any location working on that equipment type has the same documentation. The article is the institutional memory that does not leave when someone does.

The more complete the article, the more value it delivers on each use. A well-built reference article for a piece of equipment that appears at forty locations pays back the time spent building it on the first service call that saves a trip, avoids a callback, or prevents a configuration error.

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# Portfolio Planning Value: See What You Have

The Linked Parts table on a reference article is more than a list of connections. It is an inventory report.

Open the reference article for a specific HVAC model and the linked parts table shows every installation of that model in your portfolio: the part number, the fixture name, and the property it lives on. That list is your complete picture of how widely that specific equipment is deployed. Open the article for a specific display panel model and you see every property where that panel is installed.

That visibility has direct operational and financial value.

**Replacement planning.** If a manufacturer discontinues a model or issues an end-of-life notice, the linked parts table tells you immediately how many units are in the field and where they are. You can plan replacements before the equipment fails rather than responding to individual outages one at a time.

**Recall and advisory response.** When a manufacturer issues a safety recall or service advisory for a specific model, the linked parts table gives you the affected inventory in seconds. You know exactly which properties to contact, which vendors to dispatch, and how large the scope of work is before you make a single phone call.

**Warranty and contract management.** All parts linked to an article carry installation dates. Sorting the linked parts list by install date shows you which units are oldest and likely approaching

end of warranty or end of useful life. That information feeds capital planning conversations with clients and helps you prioritize where maintenance investment will be most impactful.

**Fleet consistency.** For clients who care about portfolio-wide consistency, the linked parts table shows at a glance whether every installation uses the same model and whether any locations received different equipment. Inconsistencies that would otherwise require a manual audit surface immediately.

**Client conversations.** A reference article linked to every installation of a client's primary equipment type becomes a ready-made basis for a portfolio review conversation. The documentation covers what is installed. The linked parts show where it is installed. The install dates show how old each unit is. That combination, pulled from a single article page, is a professional starting point for any discussion about maintenance contracts, upgrade cycles, or replacement timelines.

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# A Practical Workflow

The most effective way to use reference articles is to build them for products with large numbers of installations in the field first.

When you document a new equipment type in your portfolio for the first time, create the reference article at the same time. Give it a title and model number. Add the manufacturer documentation, a text section with service notes your team has learned, training videos, and the best possible phone number for support, if one exists. Then link it to the parts you just created. That article is now the foundation for every future installation of that equipment across the entire portfolio.

Modify articles with updates to software, or notes from seasoned technicians and all of that history compounds to help support technicians on future visits.

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Additional Reading: [Adding Parts to Fixtures](#), [Creating and Managing Fixtures](#), [Descriptions Save You Time and Money](#)

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