

Using Checklists with Work Orders

Checklists and work orders are designed to work together. Understanding when to attach a checklist to a work order versus sending it directly to a vendor will help you get better tracking, cleaner records, and less manual follow-up.

How Checklists Connect to Work Orders

When you create a new work order, Sytewise checks for any fixture checklists that match the work order's vendor and property/trade. If eligible checklists exist, they appear at the bottom of the WO creation form and you can select them to include. After the work order is saved, the vendor email that goes out automatically includes direct links to every checklist attached to that WO. The vendor opens one email and has everything they need: the scope of work and the task checklists to complete.

You can also attach checklists to an existing work order. On the work order detail page, the **Linked Checklists** section shows what's currently attached and provides a dropdown to add more. Only checklists that match the work order's vendor and property/trade will appear in that list.

Tip: A checklist linked to a work order shows up in the WO email automatically. You don't need to send it separately. The vendor gets the checklist link right alongside the work order details.

When to Attach a Checklist to a Work Order

If the work described in the checklist is tied to a purchase order or vendor invoice, attaching the checklist to the work order is the right call. The work order creates the paper trail: who was assigned, when the work was due, what fixtures were involved, and what the vendor was expected to complete. The checklist becomes part of that record, not a standalone item floating outside of it.

Tip: When the work needs to be tracked against a PO or vendor payment, always attach the checklist to the work order. It keeps the accountability in one place and gives you a complete picture of what was scoped versus what was actually completed.

When to Send a Checklist Directly to a Vendor

Sometimes you need to get instructions to someone without generating a work order. If the task is for internal staff, or the vendor relationship doesn't involve a formal PO, or you just need to send a one-off checklist quickly, you can assign a checklist directly to a vendor from the fixture detail page. Sytewise sends the checklist notification email right away with a direct link, no work order

required.

Tip: Use direct send when the task doesn't need a work order behind it. A vendor checklist for an informal inspection, a staff task list for routine rounds, or any instruction that doesn't generate an invoice is a good candidate for direct send.

Vendor Reassignment Carries Through Automatically

If you reassign a work order to a different vendor, Sytewise automatically updates the vendor on every checklist linked to that work order, as long as those checklists haven't been completed yet. You don't need to go into each checklist and update the vendor manually.

Tip: If a vendor change happens mid-job, reassign the work order and the open checklists follow automatically. Completed checklists are left as-is since that work was already done by the original vendor.

Deleting a Work Order Releases Its Checklists

When a work order is deleted, Sytewise detaches all linked checklists from it. The checklists themselves are not deleted. They go back to being unlinked fixture checklists, available to attach to a different work order if the work is being re-issued under a new PO or to a new vendor.

Tip: If a work order needs to be cancelled and reissued instead of being reassigned, delete the original WO and the checklists will free up automatically. Then create the new work order and attach them fresh. No need to recreate the checklists from scratch.

Removing a Single Checklist from a Work Order

You don't have to remove the whole work order to unlink a checklist. On the work order detail page, the **Linked Checklists** table has a delete icon next to each checklist. Clicking it removes the link between that checklist and the work order, setting the checklist free to be attached elsewhere. The checklist itself, and all progress on it, is preserved.

Summary: Attached vs. Direct

Situation	Best Approach
Work tied to a PO or vendor invoice	Attach to work order
Multiple fixtures, one vendor, one job	Attach to work order
Informal task, no PO involved	Send directly from fixture
Instructions to internal staff, no WO	Send directly from fixture
Quick one-off inspection checklist	Send directly from fixture

Updated Mon, Jun 8, 2026 4:01 PM by Jeff Thornhill