

# Work Orders in Sytewise

A work order is the record of work -- requested, assigned, completed, and documented. Whether you're managing a retail portfolio's HVAC maintenance schedule or tracking a multi-site AV system service call, work orders are how Sytewise connects the people doing the work to the properties and systems they're responsible for.

This article covers creating a work order, understanding its fields and status, managing work orders across your portfolio, and how the vendor portal connects vendors to the work you assign them.

For recurring and scheduled work, see [Building an Annual Workflow with Reminders](#). For attaching checklists to work orders, see [Using Checklists with Work Orders](#).

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## **What Is a Work Order?**

A work order is a task record tied to a specific property and trade. It captures what needs to be done, who is doing it, when it's due, and what happened when the work was completed. Every work order lives within the Property / Trade structure -- meaning it belongs to a specific service category at a specific location.

For property managers, work orders are how you dispatch and track vendors across your portfolio -- HVAC calls, plumbing repairs, electrical inspections, landscaping, and any other service that touches your properties.

For AV integrators, work orders are how you track service calls, installations, and maintenance visits on the AV systems inside a property. Each work order connects to the fixtures -- the individual components of a system -- giving you a documented history of every service event at that location.

In both cases, the work order is the connective tissue between your property records, your vendors, and the documented history of what's been done.

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## **Creating a Work Order**

Work orders are created from the Property Page, within the trade tab for the relevant service category. Open the property, select the trade tab that applies to the work, and click [Create a New Work Order](#). The form opens with the property and trade already filled in.

This approach is intentional -- anchoring the work order to a property and trade from the start keeps your records organized and ensures the right vendor pool, fixture list, and checklist options

load automatically.

## The Work Order Form

The creation form is organized into two columns. The left side handles the logistics of the job -- dates, vendor, contract, and costs. The right side handles fixtures, the description, and who receives the notification email.

[Screenshot: Work order creation form -- full view]

### *Left Column*

**Status: Complete** A checkbox at the top of the form. Check this only if you are creating a historical record for work that has already been done. A work order marked complete at creation will not accrue overdue status regardless of its due date.

**Subject / Title** A short label for the work order -- what this job is, in plain language. This appears in list views, emails, and reports, so make it descriptive enough to recognize at a glance. Maximum 80 characters.

**Order Date** The date the work order is being created. Pre-filled with today's date.

**Include a Work Start Date?** A checkbox that reveals an additional date field when checked. Use this when the vendor isn't expected to start immediately and you want to document a scheduled start date separately from the due date.

**Due Date** The date by which the work should be completed. Used in overdue tracking, reporting, and reminder workflows. Required.

**Vendor** The vendor assigned to complete the work. The system suggests the preferred vendor for the selected property and trade combination if one has been configured. You can search and select any vendor in your account. See Vendors in Sytewise for how preferred vendors are set up.

**Select a Contract** Appears only when one or more contracts exist for the property. Linking a contract connects the work order to that contract record and can pull in associated pricing terms. Optional.

**Reference No.** A free-text field for a purchase order number, account number, or any external reference identifier you need to associate with this work. Appears in the work order list as Acc/Inv No. Optional, maximum 60 characters.

**Line Items** An expandable section for documenting the cost breakdown of the job. Each line item has a description, quantity, and unit amount -- the system calculates line totals and a running total automatically. Line items appear in the work order email sent to the vendor and in any attached bill records.

**Fixtures** One or more fixtures the work order relates to. The fixture list loads automatically based on the property and trade. Each fixture displays a colored status indicator reflecting the current condition of its parts -- a green circle means all parts are functioning normally, yellow or orange means some parts need attention, and red means all parts are offline. These indicators give you a quick read on which fixtures in the property are already showing issues before you even open a work order.

Select individual fixtures, or use the All badge to select everything at once. Fixtures marked Already in a WO are currently assigned to another open work order -- you can still select them if the work applies to both.

To review or update the condition of parts within a specific fixture before creating a work order, open the fixture page for that fixture. Changes to part conditions there update the fixture's status indicator, which then reflects on the property page and in the fixture selection list here.

Linking fixtures creates a permanent entry on each fixture's service history. That history is what makes your system documentation credible over time and what speeds up future service calls on the same equipment.

**Description** What needs to be done. Write this as if the vendor is reading it cold -- include the specific location within the property, the nature of the problem or task, and any context that reduces the chance of a callback. A well-written description is one of the highest-leverage things you can do in a work order. See [Descriptions Can Save You Time and Money](#).

**Include Management Details in WO Emails?** Controls whether management contact information -- site title, address, and phone -- is included in the email sent to the vendor. Uncheck this if you prefer to keep management details out of vendor communications for a particular job.

**WO Email Addresses** Two sections load dynamically based on the vendor and admin users in your account. Under Vendor Contacts, select which contacts on file for the assigned vendor should receive the work order email. Under Admins to Receive the WO Emails, check any admin users who should receive a copy.

**Checklists** A checklist template can be attached at creation time. This section loads eligible checklists for the property and vendor. See [Using Checklists with Work Orders](#) for the full workflow.

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**AV integrators:** Linking fixtures at work order creation is strongly recommended. A work order tied to specific fixtures builds the service history that makes your system documentation credible and your future service calls faster. Before creating the work order, check the fixture status indicators on the trade tab -- red or yellow circles tell you exactly where the issues are. Use the description to call out the specific rack location, system, or component involved.

**Property managers:** Linking a work order to the correct trade, adding a reference number, and writing a clear description gives you the reporting foundation to track vendor performance and

cost history by property over time. The fixture status indicators are also useful here -- a trade tab full of yellow and red circles is a quick visual summary of service needs across a property.

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## **Saving and Sending**

Click Save to create the work order. The system generates a unique work order number.

Saving does not automatically send a notification to the vendor. To notify them, open the work order after saving and click Send Work Order. This gives you the opportunity to review before it goes out and to confirm which contacts are receiving it. The vendor receives an email with the work order details, description, line items, and a direct link to the vendor portal.

If the vendor needs immediate access before you send the email, the work order detail page includes a Vendor Link button that generates a direct URL you can share manually.

See WO, Survey Email Preferences to configure notification defaults.

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## **Managing Work Orders**

### **Finding Work Orders**

The WOs item in the left menu opens the full work order list -- every work order across your account. The list is searchable and filterable:

- Date Range -- filter by a specific window, toggling between order date and due/completion date
- Status -- All, Incomplete Only, Overdue Only, or Complete Only
- Type -- filter between Work Orders, Invoices, or both [VERIFY: confirm how invoice-type records are created and whether this filter applies to all account types]
- By User -- filter to work orders created by or assigned to a specific admin
- WO ID Search -- jump directly to a work order by its ID number

Results can be downloaded as a CSV -- either the full account list or the filtered results.

Work orders also surface contextually throughout the system: on a Property Page within the relevant trade tab, on a Fixture Page showing every WO ever linked to that fixture, and on a Vendor Profile Page showing every WO ever assigned to that vendor.

[Screenshot: Work order list -- filtered view]

### **Work Order Status**

Status reflects where a work order stands in its lifecycle.

Incomplete is the default state for any new work order. The work has been assigned but not yet

finished.

Complete means the work is done. A work order can be marked complete by an admin from the detail page, or automatically when a vendor submits their completion through the vendor portal.

Overdue is not a separate status but a display state. Any incomplete work order whose due date has passed shows as overdue in list views and reports. It resolves automatically once the work order is marked complete.

Rejected is set by the vendor through the vendor portal when they cannot accept the assigned work. A rejected work order is flagged visually and requires admin follow-up -- reassignment, rescheduling, or cancellation.

Keeping status current matters for two reasons: it gives you an accurate picture of what's open across your portfolio, and it's how vendors communicate progress back through the vendor portal.

### **Editing a Work Order**

Open any work order by clicking its number or subject from any list. All fields can be edited from the work order detail page.

Account superusers have two additional options not available to standard users: Reopen Work Order, which reverses a completion and returns a work order to incomplete status, and Close Without Changes, which marks a work order complete without requiring vendor documentation. Both are intentionally restricted -- use them deliberately.

Deleting a work order is also restricted to superusers and only available on incomplete work orders. Deleting a work order detaches any linked checklists -- the checklists themselves are preserved and can be reattached elsewhere. See [Using Checklists with Work Orders](#) for details.

### **Work Order History**

Every work order maintains a permanent record of what happened -- vendor notes, checklist completions, status changes, and any documentation attached. That history is tied to both the property and every linked fixture, and it doesn't go away when the work order is closed.

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### **Work Orders and the Vendor Portal**

When a work order is assigned to a vendor, that vendor accesses it through the Sytewise Vendor Portal -- a separate login environment where vendors see only the work assigned to them.

From the vendor portal, a vendor can:

- View the work order details, description, and line items
- Add notes to the work order record
- Enter their account or invoice number and actual fee for the job

- Document the condition of each linked fixture and part -- marking each as OK, Needs Service, or Repair Complete, with optional notes and photos per component
- Complete any attached checklist items
- Submit the work order as complete
- Reject the work order with a written reason if they cannot accept the assignment

[Screenshot: Work order as seen in the vendor portal]

This two-way connection is what makes Sytewise more than a task list. The vendor portal eliminates the phone and email back-and-forth of status checks -- the work order is the communication record, and both sides work from the same document.

For a full walkthrough of the vendor portal experience, see [Work Orders in the Vendor Portal](#).

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## Related Articles

- [Work Orders in the Vendor Portal](#) -- what your vendors see and can do
- [Using Checklists with Work Orders](#) -- attaching and completing checklists
- [Building an Annual Workflow with Reminders](#) -- managing recurring and scheduled work
- [WO, Survey Email Preferences](#) -- configuring notifications
- [Email Log](#) -- confirming work order emails were delivered
- [Descriptions Can Save You Time and Money](#) -- writing descriptions that reduce callbacks
- [Vendors in Sytewise](#) -- setting preferred vendors per property and trade

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