

## Repairs and Maintenance Setup and Use Guide

### Diary Search

- The existing search for R&M or work order number has been replaced with a free text field which can search based on, R&M number, work order number or Diary Subject.
- When the search is executed the matched results will be displayed.
- To clear a search, blank out the search text box and click search.

### Set Default Costs limits – Manage | Repairs & Maintenance

- Work Order limit may be set at a plan level to prefill the limit on all work order requests.

If the limit on the work order tab is edited and is greater than the default then a confirmation message will be displayed: The amount entered in the Work Order is greater than the default work order cost limit. Would you like to proceed?

- Authorised Cost Limit may be set at a plan level.

This value is used to validate if your agency has the authority to accept and quote and/or issue a work order, based on a decision made at a meeting.

The authorised cost limit must be greater than or equal to the work order cost limit. When saving this value it must be greater than, or equal to the Work Order Cost Limit.

When updating a quote request, where the amount of the quote is above the limit:

- A confirmation message will be displayed: The amount quoted is greater than the Authorised Cost Limit.
- A note will be automatically saved in the quotes Notes field: Quote is above Authorised Cost Limit

When accepting a quote request, where the amount of the quote is above the limit:

- A confirmation message will be displayed: The amount quoted is greater than the Authorised Cost Limit. Would you like to proceed?"
- A note will be automatically saved in the quotes Notes field: Quote accepted is above Authorised Cost Limit

Note: Where both cost limits are recorded as \$0.00 against an owners corporation it is assumed that the setup is not complete for the plan, and no validation will occur.

### Set Default Contact – Manage | Repairs & Maintenance

- A default R&M Access contact may be set at a plan level to prefill the access contact in the Job Details.

Any values shown on screen with the exception of the contact name can be edited and is saved against the owners corporation. This contact is a new contact type, which means that any changes made to the contact in either Owner/Agent/Tenant or Creditors screen will not be reflected against the default access contact.

The contact selection includes Owners, Agents, Tenants, Building Managers, Caretakers, Preferred or Contracted tradespeople.

Note: The contact type for a building manager, caretaker or tradesperson is Creditor.

## Default Repairs and Maintenance issue method

- A field is available to record a default method for quotes and work orders in Manage | Creditors.
- The method is displayed in the Issued Quotes grid and prefills the delivery method for Work Orders. This can be changed by the user if required.
- By default in the creditor screen is blank.

## Quote and Work Order Reports

- Compliance items allow for a message to be included on every quote and work order issued. A default message may be set for the agency, and then customised per plan via the Compliance Register.
- Display up to your R&M images on the reports. You may select different images to be included on your quote and work orders if required.
- When issuing a Work Order or a Quote where there are additional contacts who should be bcc'd on the email correspondence.
- The notification should be in the form of an email with the work order/quote attached.
- When the user clicks the email icon from the Quotes or Work Order tab additional contacts may be selected to be included in the correspondence.
- Additional contact options are: Reported by, Access Contact, Default R&M Contact and the Executive Committee (all as one option).
- The email addresses of the additional contacts are recorded in Outlook as 'bcc' recipients.

Note: Where there is no email address recorded for Reported by, Access Contact or Default R&M Contact the option is disabled. Where there are no email addresses recorded for any member of the executive, the Executive Committee option is disabled.

## Charging for issuing Quotes and Work Orders

- Select Configure | Agency | Management Fees to configure a default setting (ticked or un-ticked) for the charging of quotes and work orders.
- To charge a fee when issuing the quote(s)/work order ensure the checkbox is ticked before saving.
- By selecting additional creditors to issue a quotes request to; the checkbox will be re-enabled to allow you to charge for the additional quote request(s).
- Once you have issued the quote / work order the option to charge from the quotes / work order screens will be disabled.
- Where a work order is 'Sent' and a fee has been recovered during that process a message will be displayed on the

Work Order tab to state: A fee has been charged for this work order.

## Quick Report Additions

- Quotes
  - Diary Subject is displayed after the R&M #
  - The Quote detail is displayed after the subject.
- Creditors
  - R&M Issue (method) is displayed after creditor payment method.

## Quick Work Order

Work Order - Read Only Mode

Work Order Number: 000014

GST registered owners corporation selected  
Enter Plan No. or Street Name or Body Corporate Name.

Strata Plan 12345  
1 Smith Street  
SYDNEY NSW 2000

Date reported: 05/03/2015

Reported by: Rockend Consulting

Address line 1: PO Box 1  
Address line 2: SYDNEY NSW 2000  
Address line 3:

Home phone: 1111 1111  
Work phone: 2222 2222  
Mobile: 0425 291 102  
Fax: 4444 4444  
Email: tenant@rockend.com.au

Access contact: Rockend Consulting  
Address line 1: PO Box 1  
Address line 2: SYDNEY NSW 2000  
Address line 3:

Home phone: 1111 1111  
Work phone: 2222 2222  
Mobile: 0425 291 102  
Fax: 4444 4444  
Email: tenant@rockend.com.au

Subject: Remove graffiti  
Job Description: Please remove graffiti on the side fence of the property.  
If you cannot match the existing fence colour please quote to repaint the fence with similar colour.

Access Instructions: Contact Bob at Rockend Consulting an hour before attending the property.

Internal Notes: Insurance Claim.  
Follow up once work is complete/quoted.

R&M Images  
Image description: Side fence

Creditor contact details  
Business Contact: Grafitti Removal Co.  
1 Kent Street  
SYDNEY NSW 2000  
Mobile: 0400 000 000  
Email for payment: payment@grafitti.com.au  
Email for R & M: repairs@grafitti.com.au  
Website: www.grafitti.com.au

Order date: 05/03/2015  
Due date: 20/03/2015  
Advice Method: E-mail  
Order Status: Sent  
Cost Limit: \$500.00

Save Work Order

Charge fees for work order

- This screen is accessible from the main toolbar or by clicking Ctrl-W
- R&M access contact defaults are displayed
- All fields including images can be completed in this screen
- Upon saving, STRATA Master will automatically create a Corp Diary entry with the Job details entered on screen.

## Job Details tab

Repairs and Maintenance for Strata Plan 3333 - Hordern Place, 23 Victoria Street, POTTS POINT NSW 2011

Display linked claims

### Repairs and Maintenance 000007

**Job Details**

Date reported: 05/03/2014  Quote required

Reported by: Jeremy Bullrog

Address line 1: Hordern Place

Address line 2: 1/23 Victoria Street

Address line 3: POTTS POINT NSW 2011

Home phone: \_\_\_\_\_

Work phone: \_\_\_\_\_

Mobile: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Access contact: Jeremy Bullrog

Address line 1: Hordern Place

Address line 2: 1/23 Victoria Street

Address line 3: POTTS POINT NSW 2011

Home phone: \_\_\_\_\_

Work phone: \_\_\_\_\_

Mobile: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

**Quotes**

Note: Asbestos Control Register

Internal Notes: \_\_\_\_\_

**Quote Detail**

Please provide a written quote to remove the existing fencing and replace with similar style fence.

If a similar fence is not available please provide a quote, including photos to indicate how the replaced fence would look.

The executive committee must approve the quote at the next meeting which is being held on 11/03/2014 so please submit

**Job Description:**

Damage to common property fencing following the storm on 01/03/2014.


**Access Instructions:**

There is no need to request access prior to attending the property.

Please check if Jeremy is home when you are onsite so he knows you have been to inspect the work.

**R&M Images:**

Image description
Side fence at no. 2
Side fence at no. 6
Centre at no. 6



Next >

- The contact selector has been enhanced to display the contact type in the viewer. You may sort the contacts using any of the headings in the viewer.
- A default R&M contact may be set under Manage | Repairs & Maintenance, and this contact will be prefilled in the Access contact field for every job issued for the plan. It can be changed in the job details screen if required.
- Quote Details are now maintained separately from the work order request.
- When the checkbox quote required is ticked, the Quote details must be completed.
- When the checkbox quote required is un-ticked, the Quote details text box is disabled.
- The details recorded in the quote details are displayed on the Quote request issued.
- The subject of the diary entry is populated in the Job description, and may be cut/copied and pasted in the quote details if required.
- Spell check can be completed by clicking the icon, or F7. The contents of the Internal Notes, Quote detail, Job description and Access Instructions will be checked.
- Insurance claims linked to the job can be viewed by clicking Display linked claims; this will include the status of the claim. Note: The button will not be visible where there are no linked claims.
- To link an insurance claim to an R&M job, this is completed in the Insurance Claims screen.
- Select images to be attached to the Job details.
- A description (maximum of 20 characters) is required for each image.
- There is no limit to the number of images which can be attached to the repairs and maintenance task.

## Quotes tab

Repairs and Maintenance for Strata Plan 3333 - Hordern Place, 23 Victoria Street, POTTS POINT NSW 2011

### Repairs and Maintenance 000007

Display linked claims

Job Details | **Quotes** | Work Order

Quote request

Date requested: 05/03/2014


Requested by: Jeremy Bullfrog

Request due date: 11/03/2014

Quote reply to: Aylee Brutman

Quote Image description

- Side fence at no. 2
- Side fence at no. 6
- Centre at no. 6



Creditor type: All Types

Preferred and contracted tradesmen only

Creditor:

DAGA

SYLA

JOES

Select	Creditor	Issue P&M	Quote number	Status	Date received	Amount quoted	Reference #	Valid until	Approval by
<input type="checkbox"/>	Daintree Garden Services		000003	Requested		NIL			
<input type="checkbox"/>	Sydney Lawn Care		000004	Requested		NIL			
<input type="checkbox"/>	Joe's Handyman Services		000005	Requested		NIL			

Charge fees for quote

Save Quotes

- Select which images attached to the Job details you wish to include on the quote request. You may select different images to be included on your quote and work orders if required.
- Select a quote to be 'Accepted' and you may choose to automatically close all open quotes. A message will be automatically saved in the Notes field to state: Automatically closed.
- When rejecting a quote, there is an option to 'notify contractor that their quote was unsuccessful', which will be selected by default. Clicking Save will email this contractor automatically.
- When emailing quote requests, the address of the property is included in the subject line.
- When emailing quote requests, you may choose to include other contacts in the email to advise them of the progress of the job.
- Select the contact to be blind copied (bcc'd) in your email correspondence:

## Work Orders tab

Repairs and Maintenance for Strata Plan 3333 - Hordern Place, 23 Victoria Street, POTTS POINT NSW 2011

### Repairs and Maintenance 000007

Display linked claims

Job Details | Quotes | **Work Order**

Work Order Number: 000006

Creditor type: All Types

Preferred and contracted tradesmen only

Creditor: DAGA

Creditor contact details

Business Contact

Daintree Garden Services  
PO Box 1  
SYDNEY NSW 2000  
Telephone 1: 1234 5678  
Mobile: 0400 000 000

Order date: 05/03/2014

Due date: DD/MM/YYYY

Advice Method: E-mail

Order Status: Sent


Cost Limit: \$2,758.30

Date completed: DD/MM/YYYY

Amount Invoiced: \$0.00

WO Image description

- Side fence at no. 2
- Side fence at no. 6
- Centre at no. 6



Charge fees for work order

A fee has been charged for this Work Order

Save Work Order

- Select which images attached to the Job details you wish to include on the work order. You may select different images to be included on your quote and work orders if required.
- The default status for Work Orders is now 'Sent'.
- The advice method set at the creditor level will be the default once the creditor is selected.
- When emailing work orders, the address of the property is included in the subject line.
- A new status called Removed has been added to work orders. This status will close the work order and is intended to be used when a work order has been created in error.

## Templates for Emailing Quotes and Work Orders

Templates have been provided in the \strata\templates\ folder which can be edited in Notepad if you wish to customise the wording for the body of your email. They are named QuoteEmailTemplate.txt and WorkOrderEmailTemplate.txt.

If the templates are renamed or removed from the \templates folder, the body of the email will be blank.

The following merge fields can be used in the template:

- = Body Corporate Name
- = Action by (from the Diary)
- = Manager Name

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