

Enhanced Property Maintenance Management

Enhanced Property Maintenance Management boasts a redesigned Maintenance screen that allows you to easily search for jobs in the new Job List, attach images and documents, and simplified disbursement and completion process. Work Orders and Quote Requests have been redesigned to clearly provide all job details to your tradespeople as well as the ability to view all jobs for a Property or Creditor from the new Maintenance tab.

Property Maintenance Job screen

The Property Maintenance Job screen has been redesigned and new fields have been added to capture essential information about your maintenance requests. The Property Maintenance Job screen can be accessed by:

- Selecting Files > Property Maintenance Job, or
- Clicking the Property Maintenance icon on the toolbar



Add a new Maintenance Job

To add a new maintenance job:

1. Go to Files > Property Maintenance Job.
2. Enter the appropriate Property and Creditor.
3. Select the status of the job from the Status drop down list.
4. Enter the Maintenance Reported details, Reported Date, Reported By and Method.
5. Enter a Summary and Description of the maintenance required. Summary is a mandatory field. There is the ability to run a spellcheck using the spellcheck icon  on the Summary and Description text for Quotes and Work Orders.
6. Select a Contact for Access from the drop down list, or enter specific access information. Contact Agent can be selected if for example the property is vacant.

7. Click OK to save the job. All Maintenance Jobs are issued a unique job number.

Search for a Job

The new Job List allows you at a glance view and print a summary of your current jobs, and search for and load a specific maintenance job.

To load the Property Maintenance Job List:

1. Go to Files > Property Maintenance Job
2. Click Job List – F7
 - If you are a Manager your Current Jobs display by Follow up date.
 - If you are not a Manager all Current Jobs display by Follow up date.

Note: Current Jobs are any jobs with any status other than Completed or Rejected.

Follow up	Property Alpha	Property Address	Mgr	Status	Status Date	Creditor Alpha	Summary	Job No.
03/10/18	GIBSON40/2	2/40 Gibson Street	CK	Work Order Sent	03/10/18	NEILSCARP	Replace carpet in hallway	000000054
17/10/18	BEACH96	96 Beach Street	CK	Quote Requested	03/10/18	GEORGES	Replace picket fence	000000053
09/11/18	BILLY22/6	6/22 Billyard Avenue	CK	Work Order Sent	01/11/18	BRONNIE	Clean oven	000000056
12/11/18	WOLSELEY15	15/25 Walseley Road	CK	Quote Requested	01/11/18	DESPLUMB	Dishwasher not working	000000055
23/11/18	WHARF22	22 Wharf Road	CK	Work Order Sent	06/11/18	METROGUT	Replace Gullies	000000057
06/04/19	ARCH34	34 Archer Street	CK	Work Order Sent	10/04/19	DESPLUMB	Replace hot water system	000000060
08/04/19	BAY23/04	4/23 Bay Street	CK	Work Order Sent	10/04/19	OBRIEN	Replace glass door	000000059
10/04/19	BAY23/04	4/23 Bay Street	CK	Work Order Sent	10/04/19	GEORGES	Remove dead tree	000000058
10/04/19	ARCH34	34 Archer Street	CK	Work Order Sent	10/04/19	SPARKY	Replace kitchen double power point	000000061

To search for a Job:

1. Select one or more options from the Filter section.
 - A Manager from the drop down list.
 - A Status of a job from the drop down list.
 - Enter part or all of a property alpha in the Prop Alpha Search field.
 - Enter part or all of a creditor alpha in the Creditor Alpha Search field.
2. Click Display List or press Enter, your search results display in the grid.

To search by Job Number:

1. Enter a Job Number in the Search by Job No. Field.
2. Click Display List or press Enter, the Job displays in the grid.

To view a Maintenance Job either:

- Highlight the job and click Go to Job, or
- Double click the appropriate job in the grid.

To print a list of Jobs:

1. Search for and display the jobs you would like to report on.
2. Click Print List.
3. Print, Preview or Export the report.

PROPERTY MAINTENANCE SUMMARY

Job No	Prop Alpha	Owner	Creditor	Job Mgr	Status	Summary	Follow Up
00000054	GBSON402	Michael Douglas & Cath	Neil's Carpet Cleaning	CK	Work Order Sent	Replace carpet in hallway	03/10/18
00000053	BEACH96	Colin Firth	George's Handyman Servi	CK	Quote Requested	Replace picket fence	17/10/18
00000056	BILLY22/6	Peggy Olson	Bronnie's Cleaning Serv	CK	Work Order Sent	Clean oven	09/11/18
00000055	WOL55/15	Cate Blanchett	Desperate Plumbing	CK	Quote Requested	Dishwasher not working	12/11/18
00000057	WHARF22	Jon Bon Jovi	Metro Gutters	CK	Work Order Sent	Replace Gutters	23/11/18
00000060	ARCH34	Patrick Dempsey	Desperate Plumbing	CK	Work Order Sent	Replace hot water system	06/04/19
00000059	BAY23/04	Sharon Stone	O'Brien Locksmiths Pty	CK	Work Order Sent	Replace glass door	08/04/19
00000058	BAY23/04	Sharon Stone	George's Handyman Servi	CK	Work Order Sent	Remove dead tree	10/04/19
00000061	ARCH34	Patrick Dempsey	Sparky Electrical	CK	Work Order Sent	Replace kitchen double power	10/04/19

Number of items - 9

To view current jobs for Property or Creditor in the Job List:

1. Go to Files > Property Maintenance Job.
2. Enter the appropriate Property or Creditor Alpha.
3. Click Job List – F7, Current Jobs for the Property or Creditor display in the Job List.

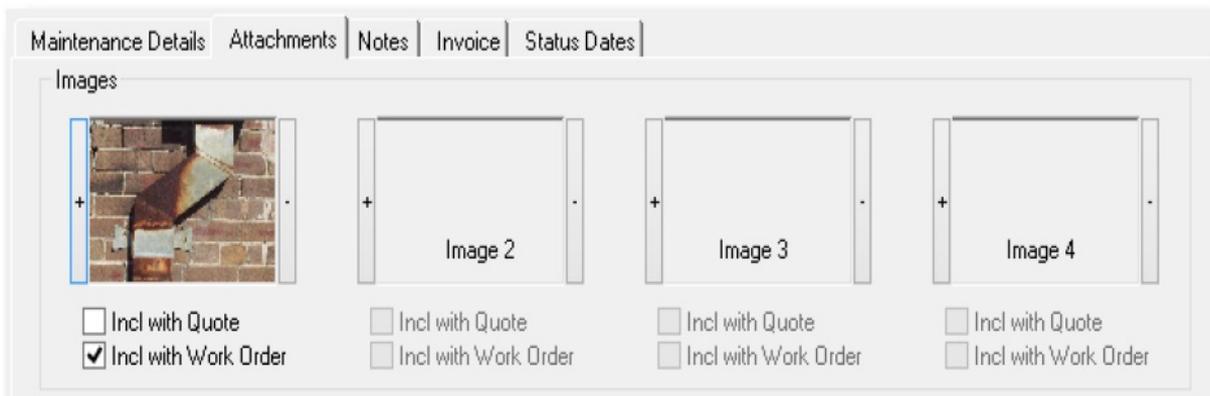
Note: Entering a Property and Creditor Alpha and selecting Job List – F6 displays any jobs attached to the Property and Creditor.

Attach Images and Documents

Images and documents related to the maintenance request can be attached to the job, and sent to the creditor to assist with the repairs and maintenance as well as a record of the job. Images and attachments are saved in the Property's REST Document Management folder, in a sub folder called Property Maintenance and then by Job Number.

To attach an image to a job:

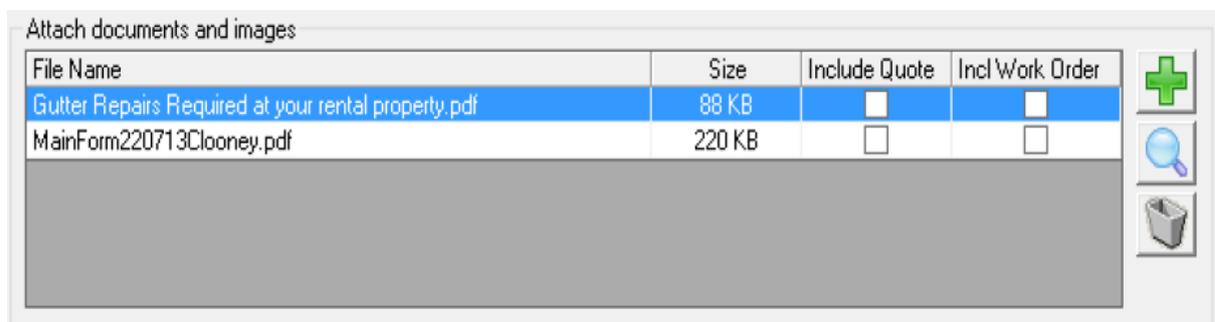
1. Go to the Attachments tab on the Property Maintenance Job.
2. Click the Plus button, the Select Image screen displays.
3. Browse for and select the appropriate image. The following image file formats can be attached, JPG, GIF, TIFF, PNG, and BMP.
4. Click Open, a thumbnail of the image displays in the images section.



5. Select Incl with Quote or Incl with Work Order, to display the image on the Quote Request and/ or Work Order.

To attach a document to a job:

1. Go to the Attachments tab on the Property Maintenance Job.
2. Click the plus button,  the Insert File screen displays.
3. Browse for and select the appropriate document. The following file formats can be attached, PDF, JPG, GIF, TIFF, PNG, and BMP.
4. Click Open, the document is added to the grid.



File Name	Size	Include Quote	Incl Work Order
Gutter Repairs Required at your rental property.pdf	88 KB	<input type="checkbox"/>	<input type="checkbox"/>
MainForm220713Clooney.pdf	220 KB	<input type="checkbox"/>	<input type="checkbox"/>

5. Select Include Quote or Incl Work Order, to display the document on the Quote Request and/ or Work Order.

Replicate a Job

Property Maintenance Jobs can now be replicated. This feature can be used to produce separate jobs to get multiple quotes. To replicate a job:

1. Search for and display the Property Maintenance Job you would like to replicate.
2. Click Replicate. A new Maintenance Job is loaded with the Property Details, Status, Manager, Maintenance Details, Attachments and Notes.

Send a Maintenance Job

Quote Requests and Work Orders can be printed and or emailed using the Save and Send Job button. Quote Requests can be produced for jobs with the status Quote Requested and Multiple Quotes. Work Orders can be produced for jobs with the status Work Order Sent.

To produce a Quote Request:

1. Search for and display a Property Maintenance Job with the status Quote Requested or Multiple Quotes.
2. Click Save & Send Job – F6, the Quote Request report selector displays.
3. Select from the radio dot options
 - Select Print Quote Request, to Print the Quote.
 - Select Email Quote Request, to Email the Quote.
 - Select Print & Email Quote Request, to Print and Email the Quote.
4. Click Process – F12, the quote request is printed and or emailed to the Creditor.
Attachments are included.

Quote Request

100%

1/1

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George's Handyman Services
225 Balmain Road
BALMAIN NSW 2041

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Reference GEORGES

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Email Address: george@ghs.com.au
Contact: (M) 0416 234 876 (Bus) 9908 7656 (A/F) 9908 5434 (Fax) 9908 7655

QUOTE REQUEST	Job No. 28
<p>Job Address</p> <p>24 Gallimore Avenue BALMAIN EAST NSW 2041</p>	<p>Agency Details</p> <p>Manager Clark Kent Mobile 0411 897 897 Email clarkk@rockend.com.au</p>
Contact for Job Access	
Mr Clooney's Assistant Jane (M) 0424 987 456 (E) jane@clooneyproductions.com	
Summary Quote for Fence Repair or Replace	
<p>Description</p> <p>Fence down the left side of property is damaged. Please prepare two quotes, one to repair the damage and another to replace that whole side.</p>	
	

To produce a Work Order:

1. Search for and display a Property Maintenance Job with the status Work Order Sent.
2. Click Save & Send Job – F6, the Work Request report selector displays.

3. Select from the radio dot options

- Select Print Work Order, to Print the Quote.
- Select Email Work Order, to Email the Quote.
- Select Print & Email Work Order, to Print and Email the Work Order.

4. Click Process – F12, the work order is printed and or emailed to the Creditor.

Attachments are included.

Work Order

100%

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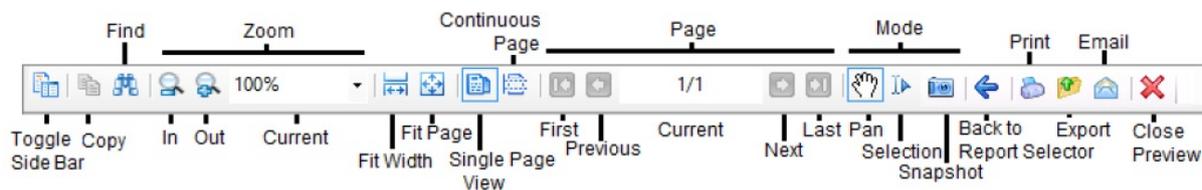
WORK ORDER	Job No. 17		
Job Address 4 Wylde Avenue Potts Point NSW 2011	Agency Details Manager Clark Kent Mobile 0411 897 897 Email clarkk@rockend.com.au		
Contact for Job Access			
Luke Skywalker H 02 9867 3456 M 0419 833 072			
Summary	Work to Gutters	Amount Quoted	\$660.00
Description			
Clean out gutters and replace rusted downpipe next to laundry door			
Please account to Mr Daniel Craig c/- Real Estate.			
Legislation requires that all tradespeople need to be insured. Upon renewing your policy please forward a copy of the Certificate of Currency to our office. Failure to be insured will mean that we cannot use your services. Should you have any queries please call our Property Manager Clark Kent on 9966 0900.			



The new report layouts use the existing REST options for displaying your company header and logo when printing and emailing, header and footer offsets, report margins and options to display or not display particular information on quotes and work orders.

New Report Preview Toolbar

You will notice that the Quote Request and Work Order have been created in a new report writer. There is also a new report preview screen that provides the following options in the toolbar.

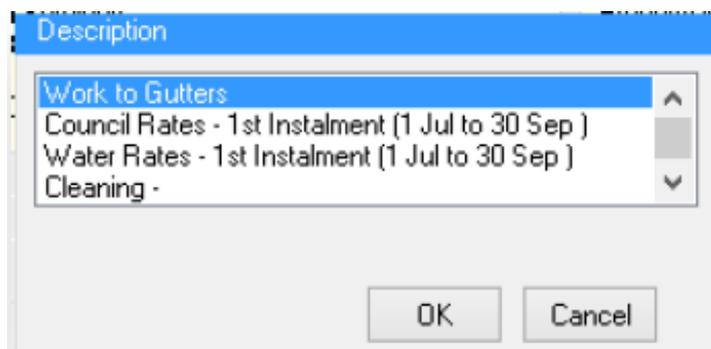


Create a Disbursement

The disbursement process has been simplified. All fields relating to the disbursement have been moved to the Invoice tab and disbursement can now be created for creditors paid by BPAY.

To create a disbursement from a Property Maintenance Job:

1. Search for and display a Property Maintenance Job.
2. Go to the Invoice tab.
3. Select who the invoice has been authorised by, leave blank if not applicable.
4. Enter an Invoice Amount.
5. Enter a Description that displays on the Owner Statement. Pressing enter displays your default description, the first entry is the Summary of your Job.



6. Enter an Account Code, Reference and the Date Due.

Disbursement

Invoice Authorised for payment by

Incl GST GST Excl GST

Description

Account code R & M - General

Invoice Number Date due

Create Disbursement

7. Select Create Disbursement.
8. Select a Priority for the disbursement.
9. Click OK, an outstanding disbursement is created.

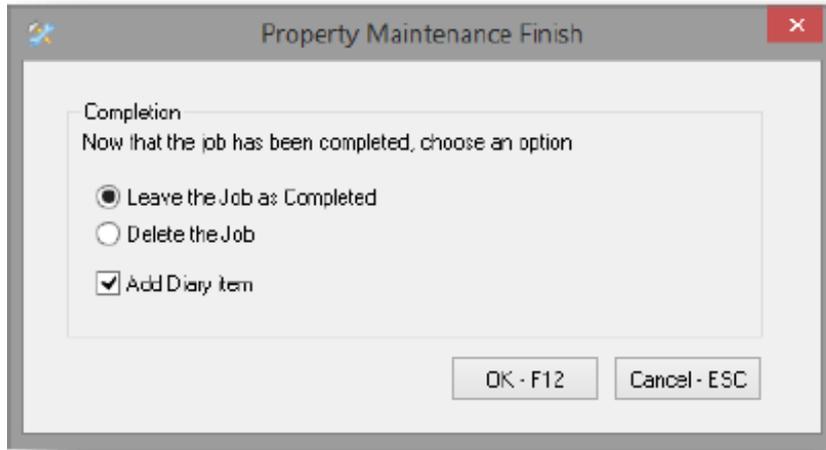
Finalise a Maintenance Job

Property Maintenance Jobs with a status of Completed or Rejected can be finalised. You will need to decide whether you would like to leave the job as Completed or Rejected and if you would like to create diary item with details of the job.

Maintenance Jobs should be set to completed when the repairs or maintenance have been completed by the creditor and an invoice has been actioned. A prompt displays before completing a Job that hasn't had a Disbursement created, to ensure this is correct. Completed Jobs are not displayed as a Current Job in the Job List.

To complete a Maintenance Job:

1. Search for and display a Property Maintenance Job.
2. Select Completed from the Status drop down list.
3. Click Save.
4. Select to Leave the Job as Completed, or Delete the Job.
 - Leaving the job as completed allows you to access it from Property and Creditor Details.
 - Deleting the job means that there won't be any record of the job in Property Maintenance.
5. Select the Add Diary item checkbox, this is recommended if you are deleting the Job in order to keep a record.

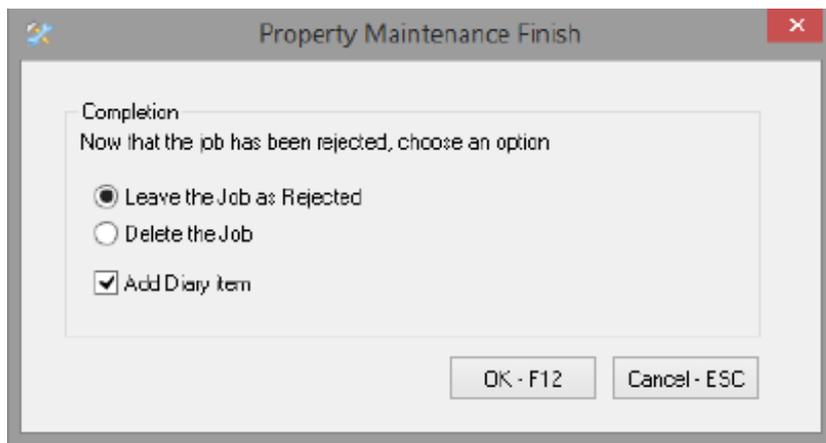


6. Click OK, the Property Maintenance Diary item displays.
7. Confirm the details of the diary item and click Cancel.

Maintenance Jobs should be set to rejected when repairs or maintenance were cancelled or not completed and an invoice will not be actioned for the job. Rejected Jobs are not displayed as a Current Job in the Job List.

To reject a Maintenance Job:

1. Search for and display a Property Maintenance Job.
2. Select Rejected from the Status drop down list.
3. Click Save.
4. Select to Leave the Job as Rejected, or Delete the Job.
 - Leaving the job as completed allows you to access it from Property and Creditor Details.
 - Deleting the job means that there won't be any record of the job in Property Maintenance.
5. Select the Add Diary item checkbox, this is recommended if you are deleting the Job in order to keep a record.



6. Click OK, the Property Maintenance Diary item displays.
7. Confirm the details of the diary item and click Cancel.

Property Maintenance Diary Item

The information that displays on the diary item that can be produced when a job is Completed or Rejected has been updated with the following changes:

- The Job Summary is populated in the Diary Subject field.
- The Job Number, Reported By details, Quote Amount and Quote Comments have been added.
- The Diary Item is now saved before it is displayed.

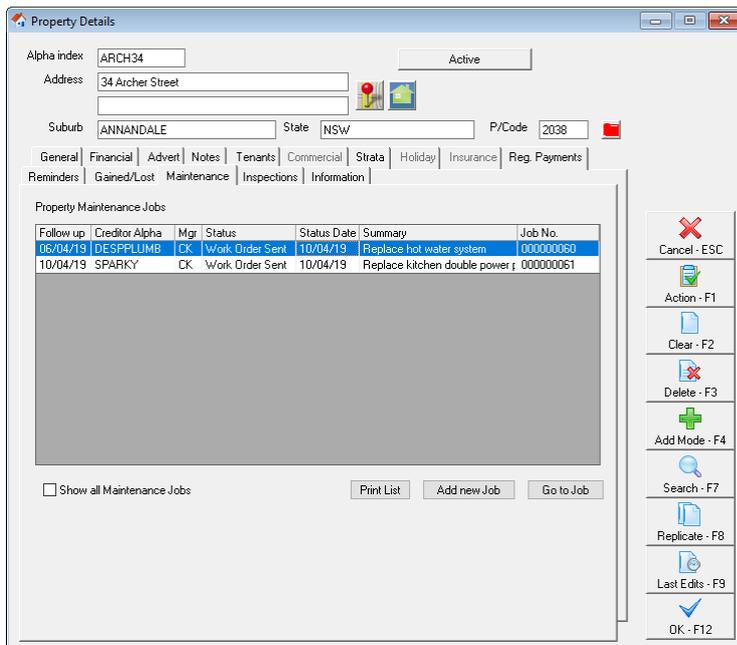
Access Maintenance Details from Property and Creditor Details

Property Maintenance Jobs can now be viewed for a Property or Creditor using the new Maintenance tab. You can also add a new job for the selected property or creditor and print a list of jobs displayed.

To view a properties maintenance jobs:

1. Go to Files > Property.
2. Search for and display the appropriate property.
3. Go to the Maintenance tab.

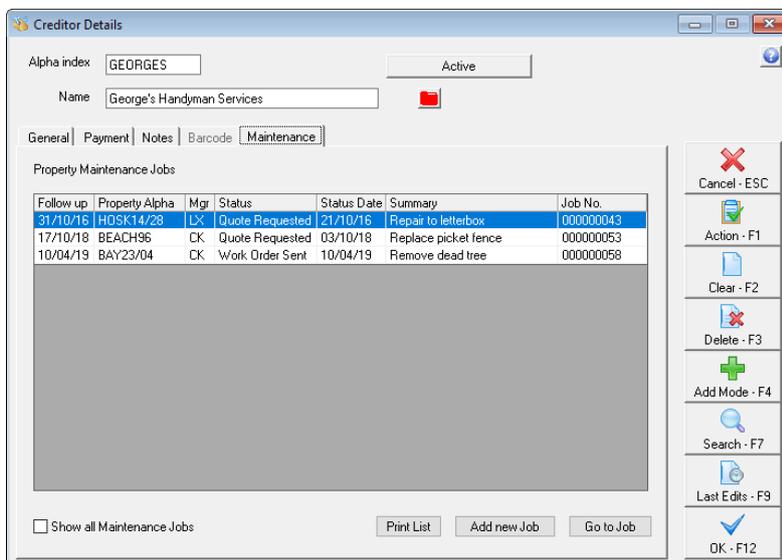
Current Jobs display that is jobs with any status other than Completed or Rejected.



To view a creditors maintenance jobs:

1. Go to Files > Creditor.
2. Search for and display the appropriate property.
3. Go to the Maintenance tab.

Current Jobs display that is jobs with any status other than Completed or Rejected.



- To display all jobs including Completed and Rejected, select Show all Maintenance Jobs.
- To create a new job, click Add new Job, the Property Maintenance Job screen displays with the Property Alpha.

- To view a job, either highlight the appropriate job in the grid and click Go to Job or double click the job in the grid.
- To print a list of jobs displayed, click Print List, the Property Maintenance Jobs by Property or Creditor displays.

PROPERTY MAINTENANCE REPORT

Date: First - Last 1 records selected -

Property	Creditor	Owner	Job Mgr	Job No
ARCH34 34 Archer Street ANNANDALE NSW 2038	Sparky Electrical	Patrick Dempsey	CK	00000014
Summary: Replace kitchen double power point Reported on: 02/07/13 By: Heather Locklear	Key: 16 Method: Maintenance Form	Status: 05/12/13 Follow Up: 08/07/13		Completed
Contact for Access: Heather Locklear H 02 9450 7689 W 02 9237 8978 M 0419 085 645 F 02 9237 8977				
Amount Quoted: 0.00 Amount Invoiced: 110.00 Invoice Ref: 175634	Quote Comments: Invoice Authorised By: Clark Kent Invoice Description: Replace kitchen double power point			
Description: Replace kitchen double power point Created By: (CK) 02/07/13 at 4:54 PM				
ARCH34 34 Archer Street ANNANDALE NSW 2038	O'Brien Locksmiths Pty Ltd	Patrick Dempsey	CK	00000033
Summary: Install security screen door Reported on: 29/04/16 By: Heather Locklear	Key: 16 Method: Email	Status: 02/05/16 Follow Up: 05/05/16		Rejected
Contact for Access: Heather Locklear (H) 02 9450 7689 (W) 02 9237 8978 (M) 0419 085 645 (F) 02 9237 8977 (E) heather@melrose.com.au				
Amount Quoted: 1200.00 Amount Invoiced: 0.00 Invoice Ref:	Quote Comments: Invoice Authorised By: Invoice Description:	Emailed quote to owner 4/8/14		
Description: Install security screen door Created By: (CK) 30/07/14 at 11:36 AM				

KPI Reports

KPI Reports have been updated for the enhancements to Property Maintenance.

- The following new Property Maintenance fields display in the Property Maintenance Detailed Information section of the Manager KPI Report: Reported Date, Reported Method and Follow up date.
- Completed and Rejected jobs now display for the report period, rather than up to the report end date.

Property Maintenance									
Current Maintenance as at 10/01/2013									
Pending		0							
Quote Requests		1							
Multiple Quotes		0							
Awaiting Approval		0							
Work Orders Sent		1							
Owner attending		0							
Hold		0							
Finalised Maintenance 04/01/2013 - 10/01/2013									
Completed		1							
Rejected		0							
Property Maintenance Detailed Information									
Property Address	Property Alpha	Creditor	Job Status	Job Status Date	Follow Up	Reported	Reported Method	Quote	Invoice
32 Manning Street, QUEENS PARK, NSW, 2022	MANN32	Bronnie's Cleaning Serv	Quote Requested	02/01/2013	15/01/2013	20/12/2012	Email	\$0.00	\$0.00
24 Gallimore Avenue, BALMAIN EAST, NSW, 204	GALL24	Neil's Carpet cleaning	Work Order	05/01/2013	10/01/2013	05/01/2013	Phone	\$480.00	\$0.00
34 Archer Street ANNANDALE, NSW, 2038	ARCH34	Desperate Plumbing	Completed	09/01/2013	04/01/2013	02/01/2013	Phone	\$0.00	\$110.00

View Maintenance Jobs on Owner Portal

From Version 11 you can provide your Owners access Property Maintenance Jobs for their Property.

Select to provide a summary of each Property Maintenance Job or provide detailed information on each Maintenance Job on the new Maintenance tab. And whether to include Property Maintenance Images.

The screenshot displays the 'Real Estate' Owner Portal interface. At the top, there is a green header with the text 'Real Estate THE BEST REAL ESTATE SERVICES FOR YOU'. Below this, the user is logged in as 'Sydney's Premier Agency'. The navigation menu includes 'Portfolio', 'My Details', 'Statements', 'Documents', and 'Maintenance'. The 'Maintenance' tab is active, showing a list of 'Finalised Maintenance Jobs' with columns for Date, Status, Job Summary, Property Code, and Job No. A 'Display Current Jobs' link is also present.

Date	Status	Job Summary	Property Code	Job No
18/10/2013	Completed	Gutter Repairs	BAY23/0444	27
18/10/2013	Completed	Fence Repairs	BORON	26
30/04/2004	Completed	Remove dead tree from side of house	BAY23/0444	5

Below the list, the details for a specific job are shown:

Property Maintenance Job
23 Bay Street BALMAIN NSW

Job Description
Gutter Repairs
Please clean gutters and replace gutter on eastern boundary of house due to rust.

Tradesperson

Name	George's Handyman Services
Amount Quoted	\$870.00
Amount Invoiced	\$870.00
Invoice Description	Gutter Repairs
Invoice Number	4747474

Images

Job Summary:

- Completed: 20/10/2013
- Job Number: 27
- Manager: Clark Kent
- Reported By: Angelina Jolie
- Created: 18/10/2013

29/04/2019 11:08 am AEST