PropertyIQ™

Work orders

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INTRODUCTION TO WORK ORDERS

The work orders function allows you to process and track all your work orders; email suppliers and committee members; request and accept quotes and finalise work orders. You can track the whole team's work orders or filter to view by individual or building.

A work order in PropertyIQ refers to every stage of a job that needs to be done and retains the same identity and ID number throughout the whole process.

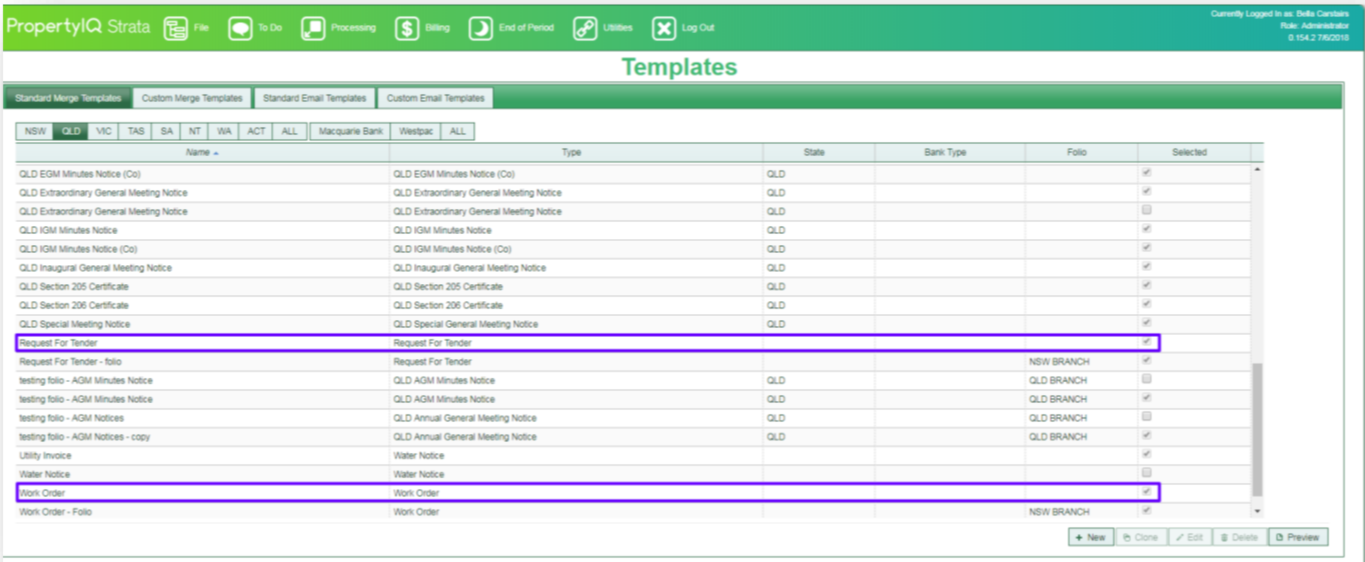
WORK ORDER FLOW CHART

TEMPLATES REQUIRED FOR WORK ORDERS

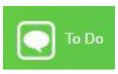
There are two standard merge templates required for work orders –

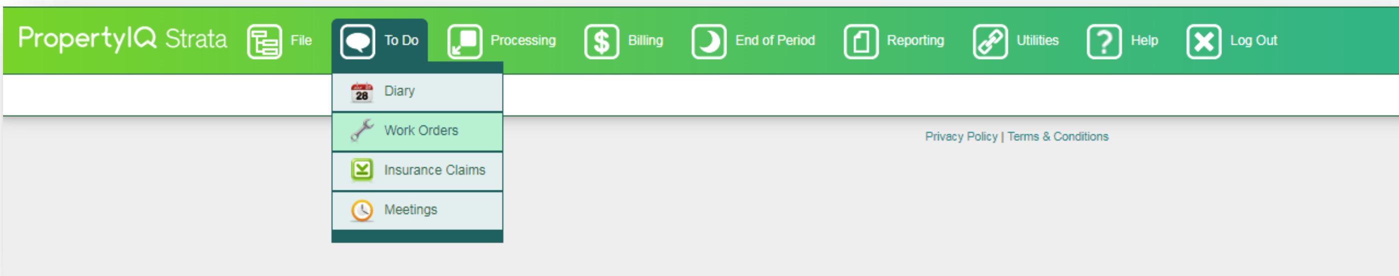
- Work Order
- Request for Tender

These should be edited to suit your company requirements prior to generating any work orders.



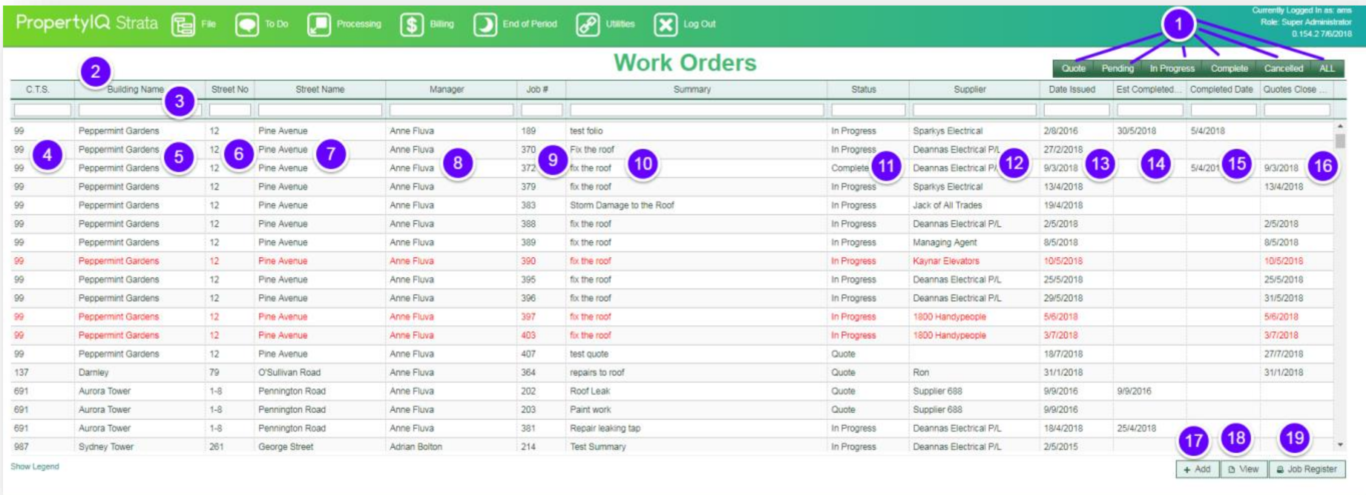
GETTING STARTED

To access work orders, go to  and click on *Work Orders*.



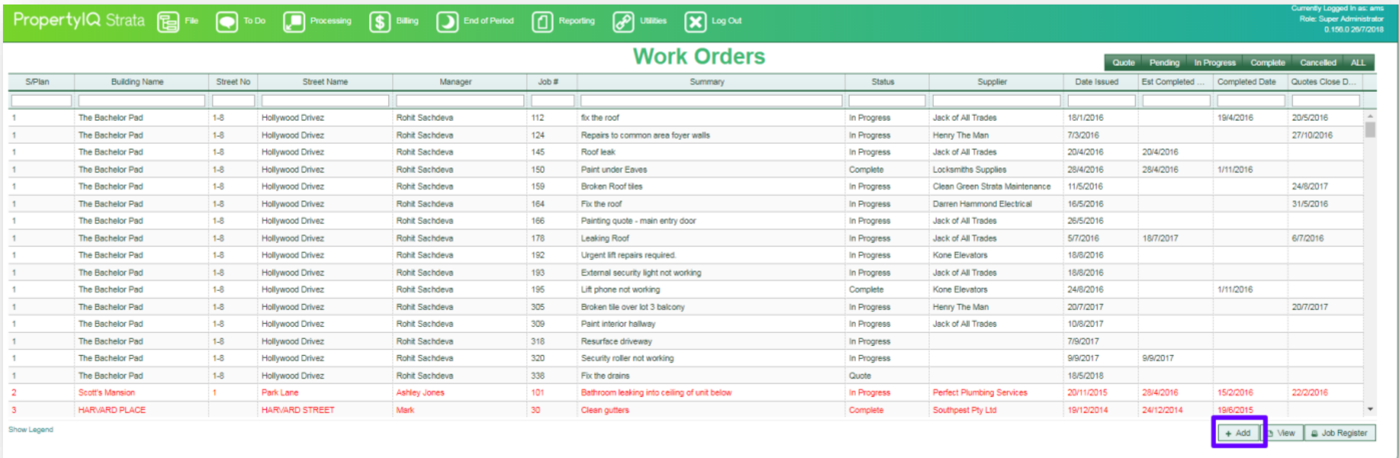
1. The default view shows all work orders, but you can refine the view to view by status:
    - Quote: quotes requested, awaiting on responses
    - Pending: work order created but work not yet requested
    - In Progress: work requested/in progress but not complete
    - Complete: work order has either been marked as complete from the work order or invoice has been processed, automatically changing the status of the work order to complete
    - Cancelled: the work order has been cancelled
    - Standing: an ongoing work order. There is no tab for Work Orders with Standing status. To find these, type Standing in the Status column

2. You can click on any column heading to order the screen by that heading
3. Type some key letters in any of the empty boxes on the top line to refine your search
4. The Strata plan number of the building the work order is for shows here
5. The name of the building the work order is for shows here
6. The street number of the building the work order is for shows here
7. The street name of the building the work order is for shows here
8. The manager of the building the work order is for shows here
9. When a work order is created, it is automatically assigned a unique job number, which shows in this column
10. The summary details of the work order show here
11. The status of the work order shows here
12. If a supplier has been selected for this work order, their name shows here
13. If a work order document has been issued, its date of issue shows here
14. If an estimated date of completion has been entered, the date shows here
15. If the work order has been completed, the completion date shows here
16. If a quotes close date has been entered, it shows here
17. Click *+Add* to add a new work order
18. Click *View* to view a work order that has been highlighted on the screen
19. Click *Job Register* to generate a register of all work orders in PDF Format

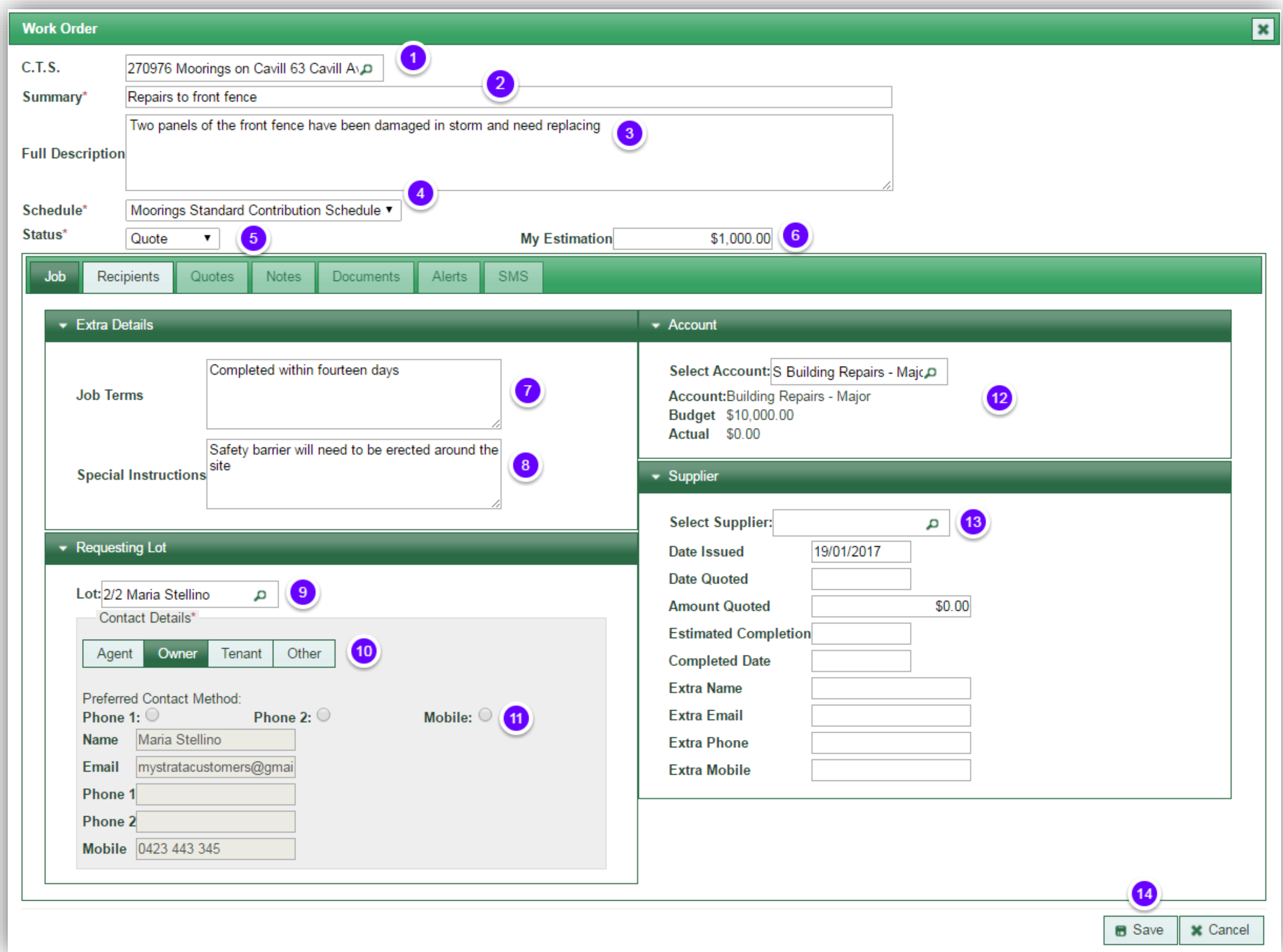


ADDING A NEW WORK ORDER – NO QUOTE REQUIRED

Click on *+Add* at the bottom right of the work orders screen.

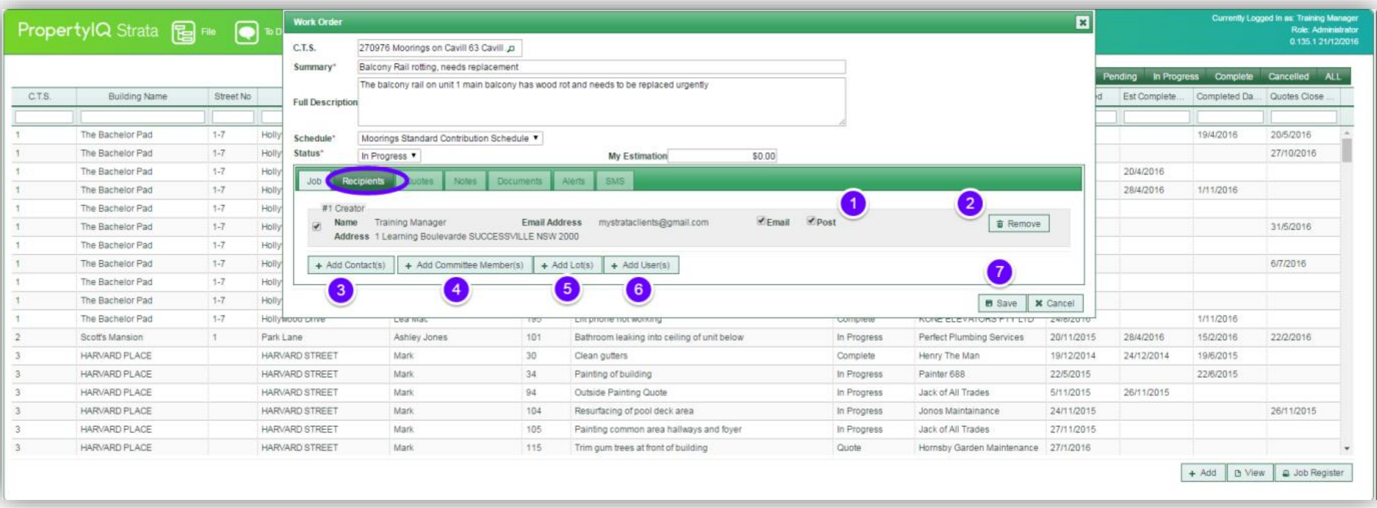


1. Click on the search icon to find the building the work order is for
2. Enter some summary details – this information shows on the work order document and also on the work order card
3. Enter more details – this information shows on the work order document and on the work order card
4. If the building has more than one contribution schedule, use the dropdown list to select the contribution schedule the invoice will be paid from
5. The work order status will default to *In Progress*. This is correct if you are not requesting quotes
6. You can enter your estimated cost here. Note: the supplier will not see this on the work order document
7. Enter the job terms here. Note: if you have a standard term that you put on all work orders, it is easiest to add this to your work order template so you don't have to keep entering this for each work order you create.
8. Enter any special instructions here
9. If the job has been requested by a lot owner, click on the search icon to find the appropriate lot owner.
10. Click on the tabs to nominate the contact person – *Agent, Tenant, Owner, Other*. If the contact's details are already in PropertyIQ, they will appear below or you can type the details for an *Other* contact
11. Tick the box to nominate their preferred contact method.
12. Select the chart of accounts code you want to allocate to the work order (this can be entered later) By default, only codes that have been budgeted for that building show. If you want to select another chart of accounts code that is not budgeted for, click the *budgeted accounts* tab to display all accounts
13. If you are not requesting quotes, enter the supplier here by clicking on the search icon to open the suppliers screen. The *date issued* defaults to today's date but you can click in the box to open the calendar and select another date.
14. Click *Save* to save your work order.



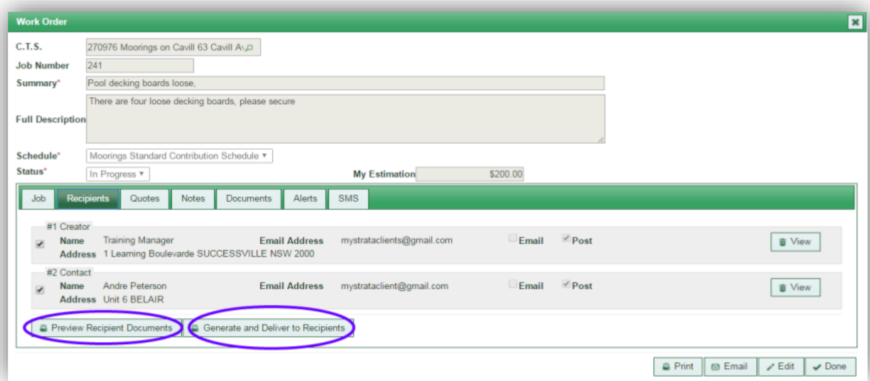
RECIPIENTS TAB

The supplier will always be a recipient and their method of delivery is set on their supplier card, so they don't need to appear here. This area is only for other parties that need to receive a copy of the work order document. The creator of the work order and the strata manager for the building show as recipients by default.



1. The delivery method is automatically set to email if the recipient has an email otherwise it will set to post
2. Click on the *Remove* button if you do not want any of the default recipients to receive the work order
3. Click the *+Contacts* tab to search for additional contacts such as a building manager or caretaker to send a copy of the the work order to. Note: Once the contacts screen is open, you can add a new contact by clicking on *+Add*
4. Click *+Committee members* to search for committee members to send a copy of the work order to.
5. Click *+Add Lot(s)* to search for lot owners to send a copy of the work order to
6. Click *+Add User(s)* to search for users to send a copy of the work order to.
7. Click *+Save* to save your work order

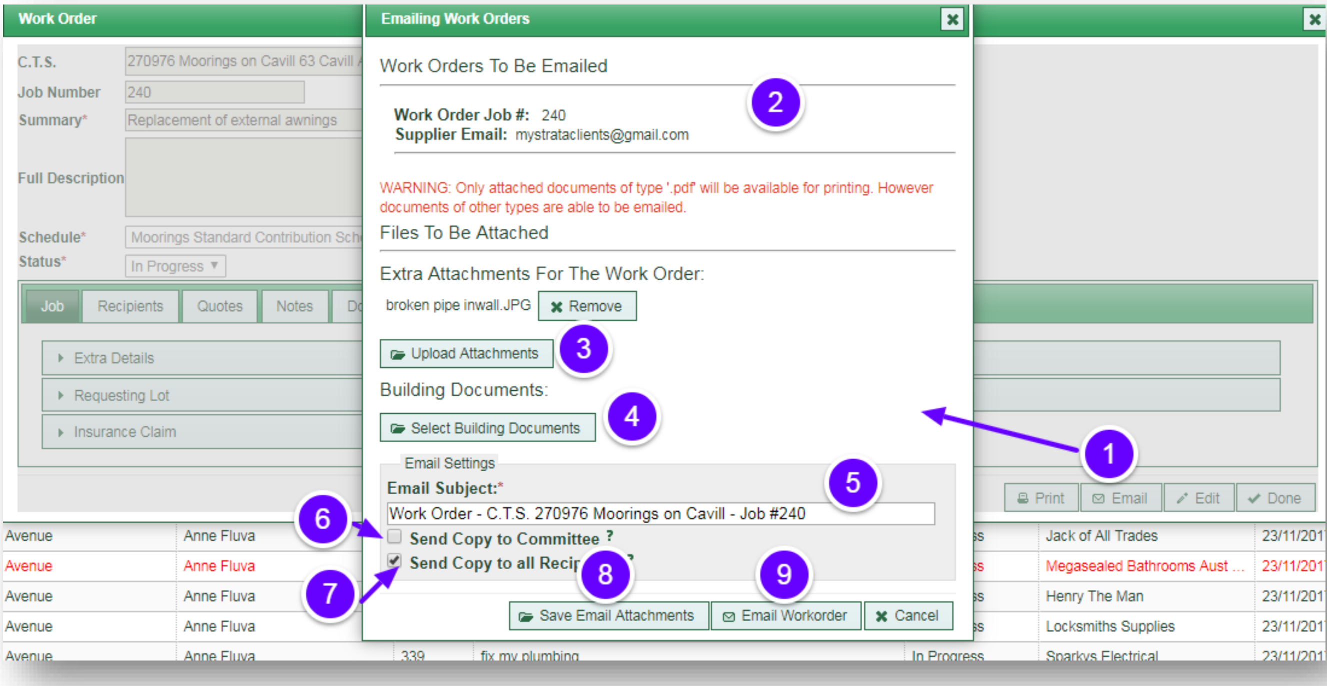
Click on the *Preview Recipients* button to generate a preview or the *Generate and Deliver to Recipients* to email or post.



EMAIL BUTTON

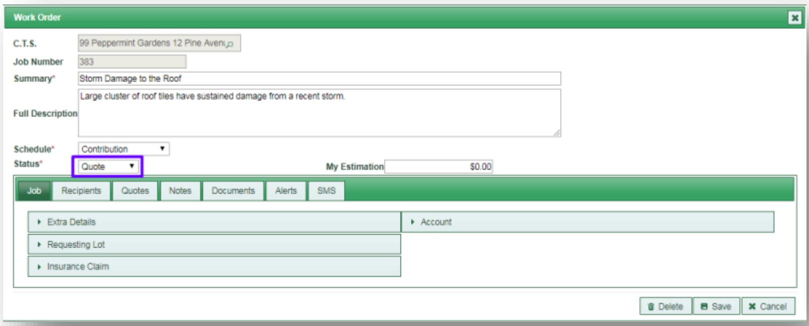
You can choose the *Email* button to send the work order if you want to attach additional documents.

1. Click on the *Email* button
2. The job number and the receiving email address show here
3. Choose *Upload Attachments* to upload and attach documents that are on your computer
4. Choose *Select Building Documents* to attach documents that are already saved in the building's documents
5. The subject is pre-populated, but you can edit if you need to
6. *Send copy to committee* sends a copy to all committee members that are ticked as work order recipients on their committee member card.
7. Send copy to all recipients sends a copy to all the recipients shown on the recipients tb
8. Click here to save the email attachments to the documents tab of the work order
9. *Email work order* when you are ready to send the work order



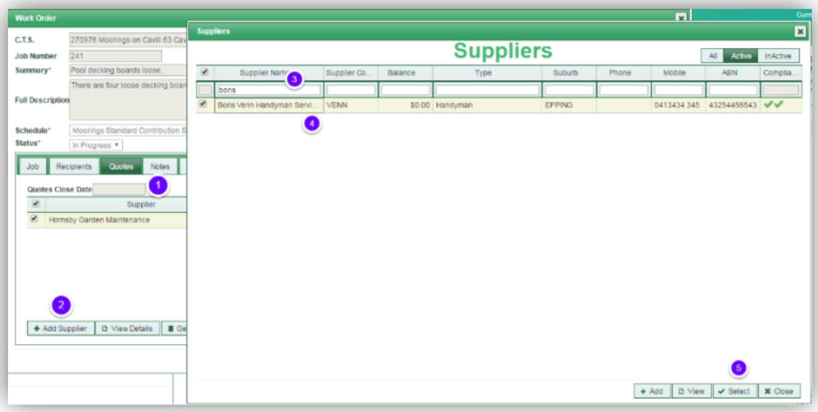
REQUESTING QUOTES/TENDERS

If you need to request quotes/tenders for the work order, make sure you set the work order status to *Quote*



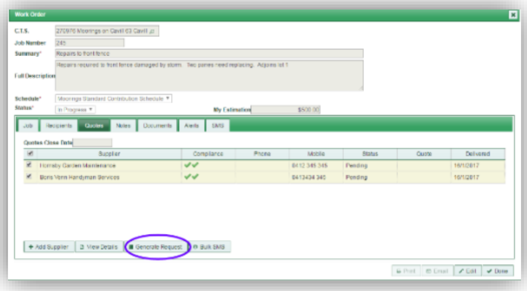
1. Enter the closing date for quotes here. This will automatically create an entry in your diary.
2. Click on *+Add Suppliers* to add any suppliers you want to request a quote from.
3. Type some key letters in the blank fields at the top to refine your search for suppliers. You can search by name or if you have created supplier types, you can search by type.
4. Select the suppliers you want to request quotes for by clicking here
5. Click *Select*

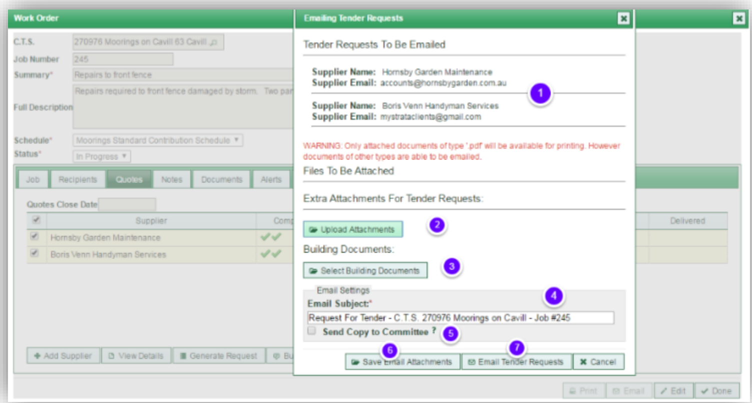
Repeat to add more suppliers. You can add as many suppliers as you want



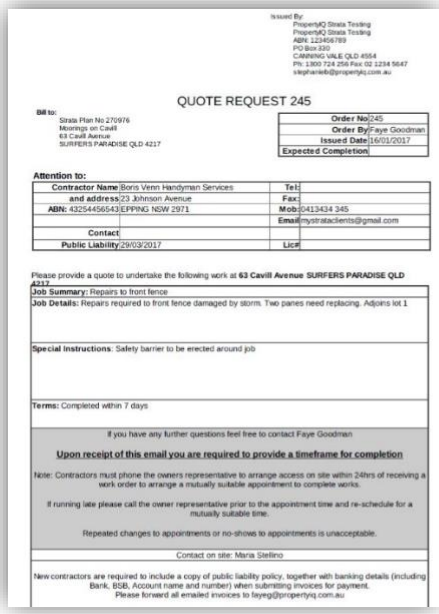
EMAILING A QUOTE REQUEST

Click on the *Generate Request* button to get started





1. The Suppliers you selected will show on this tab and will receive a PDF quote request. Note: This is a standard merge template that you can edit to suit your company from the Templates menu.



Issued By:
PropertyIQ Strata Testing
PropertyIQ Strata Testing
ABN: 123456789
PO Box 330
CANNING VALE QLD 4554
Ph: 1300 724 256 Fax: 02 1234 5647
stephanieb@propertyiq.com.au

QUOTE REQUEST 245

Bill to:
Strata Plan No 270976
Moorings on Cavill
63 Cavill Avenue
SURFERS PARADISE QLD 4217

Order No	245
Order By	Faye Goodman
Issued Date	16/01/2017
Expected Completion	

Attention to:

Contractor Name	Boris Venn Handyman Services	**Tel:**	
and address	23 Johnson Avenue	**Fax:**	
ABN: 43254456543	EPPING NSW 2971	**Mob:**	0413434 345
		Email	mystrataclients@gmail.com
Contact			
Public Liability	29/03/2017	**Lic#**	

Please provide a quote to undertake the following work at **63 Cavill Avenue SURFERS PARADISE QLD 4217**

Job Summary: Repairs to front fence

Job Details: Repairs required to front fence damaged by storm. Two panes need replacing. Adjoins lot 1

Special Instructions: Safety barrier to be erected around job

Terms: Completed within 7 days

If you have any further questions feel free to contact Faye Goodman

Upon receipt of this email you are required to provide a timeframe for completion

Note: Contractors must phone the owners representative to arrange access on site within 24hrs of receiving a work order to arrange a mutually suitable appointment to complete works.

If running late please call the owner representative prior to the appointment time and re-schedule for a mutually suitable time.

Repeated changes to appointments or no-shows to appointments is unacceptable.

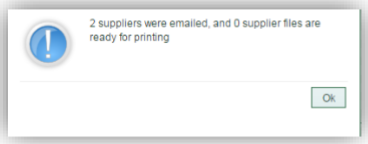
Contact on site: Maria Stellino

New contractors are required to include a copy of public liability policy, together with banking details (including Bank, BSB, Account name and number) when submitting invoices for payment.
Please forward all emailed invoices to fayeg@propertyiq.com.au

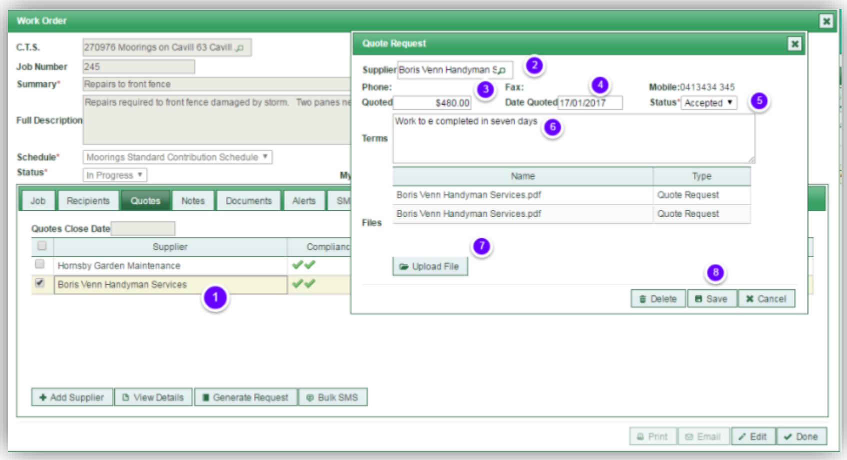
2. Click on the *Upload Attachments* button If you want to add extra attachments. For example a photo. If you are printing the quote request then only PDF documents will print. A photo file such as a JPEG or PNG will attach to an email but will not print.
3. Click on the *Select Building Documents* tab if you want to attach any document that is already saved in the building's documents.
4. The subject line will fill automatically but you can overtype this if you want to

5. Tick here if you want to email a copy to the committee
6. Click on the *Save Email Attachments* button to save a copy of any attachments you have selected. These will now be saved in the documents tab of the work order
7. Click *Email Tender Requests* to send. The standard merge template *Tender Request* is the document that generates.

You will receive a confirmation that your emails have been sent. Note: if the supplier is selected to receive all jobs by mail, a PDF will generate in the job centre on the right side of your screen. Once this process is completed the *Delivered* column shows the date the emails were sent.



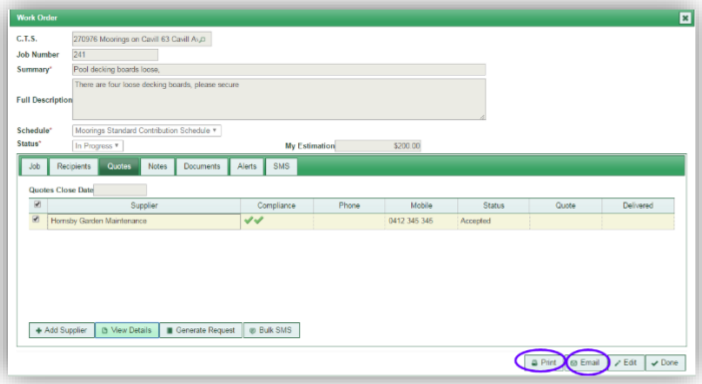
ACCEPTING A QUOTE



1. Highlight the supplier you want to accept for the job
2. The supplier you selected shows here
3. Enter the amount quoted
4. Enter the date the quote was received
5. Use the dropdown list to change the status to *Accepted*
6. Enter any terms the supplier has included in their quote
7. If you want to add further documents, you can use the *Upload File* button
8. Click *Save*

PropertyIQ will automatically alter the status of any other quoting supplier to *Declined*. You can email them manually to advise them if you want to.

Click on either *Print* or *Email* to send the work order to the accepted tradesperson

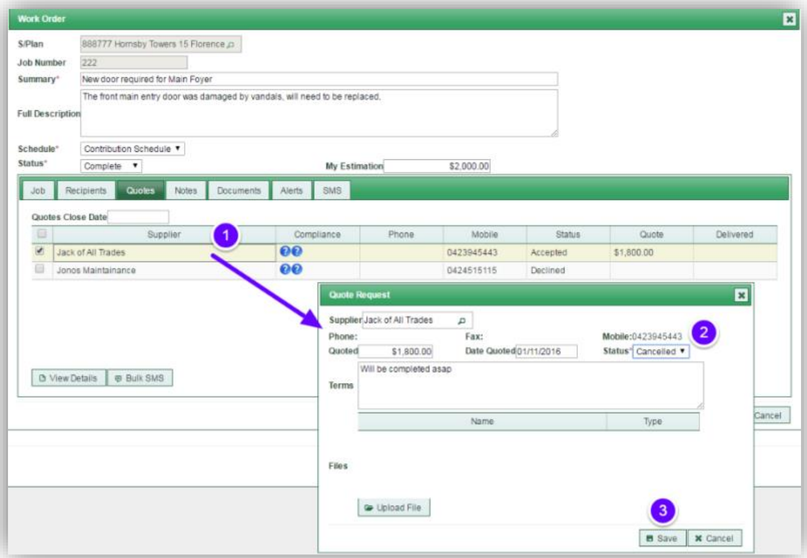


If you are requesting quotes, it is a good idea to avoid using words specific to a quote when you create your initial work order. That way you won't have to alter any of the wording at this stage. Quote specific wording should be part of the master template

Altering a quote request status to Cancelled

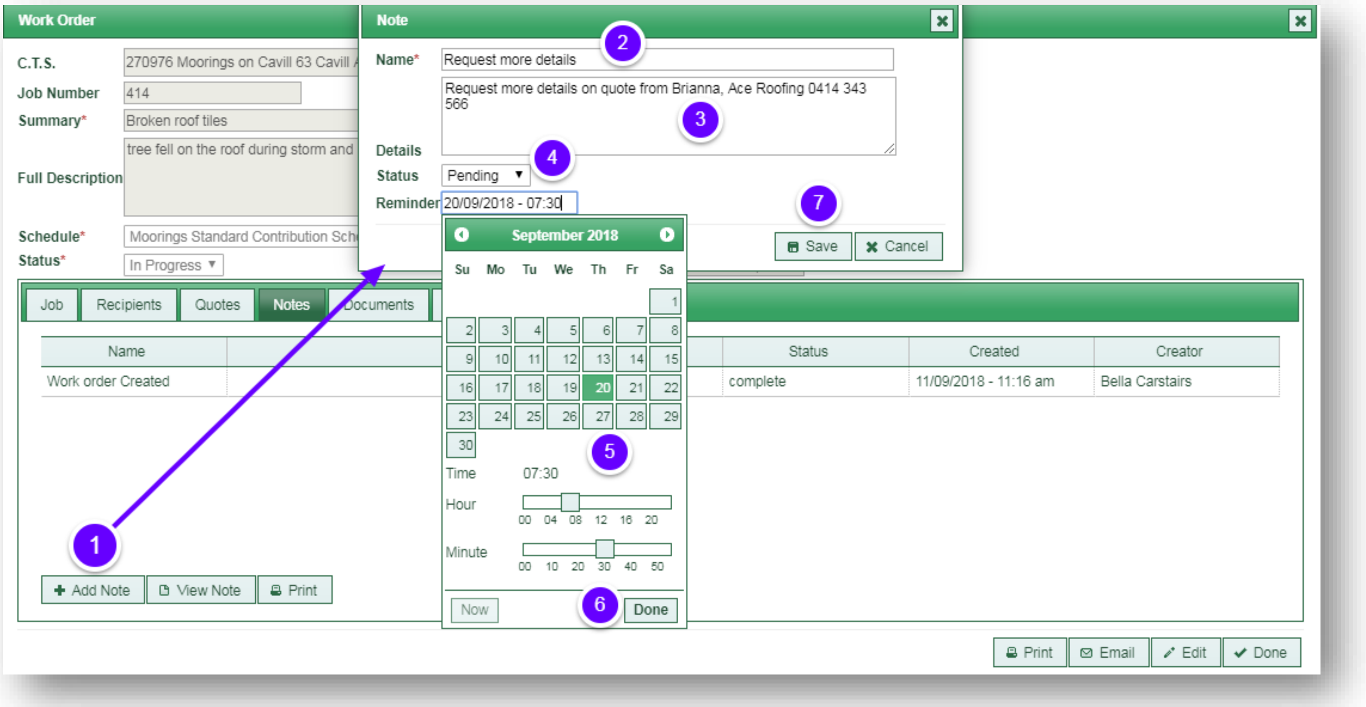
1. Click on the quote request you want to edit
2. Choose Cancelled from the dropdown list

This will not email the Suppler. You can notify them manually by sending them an email if you want to

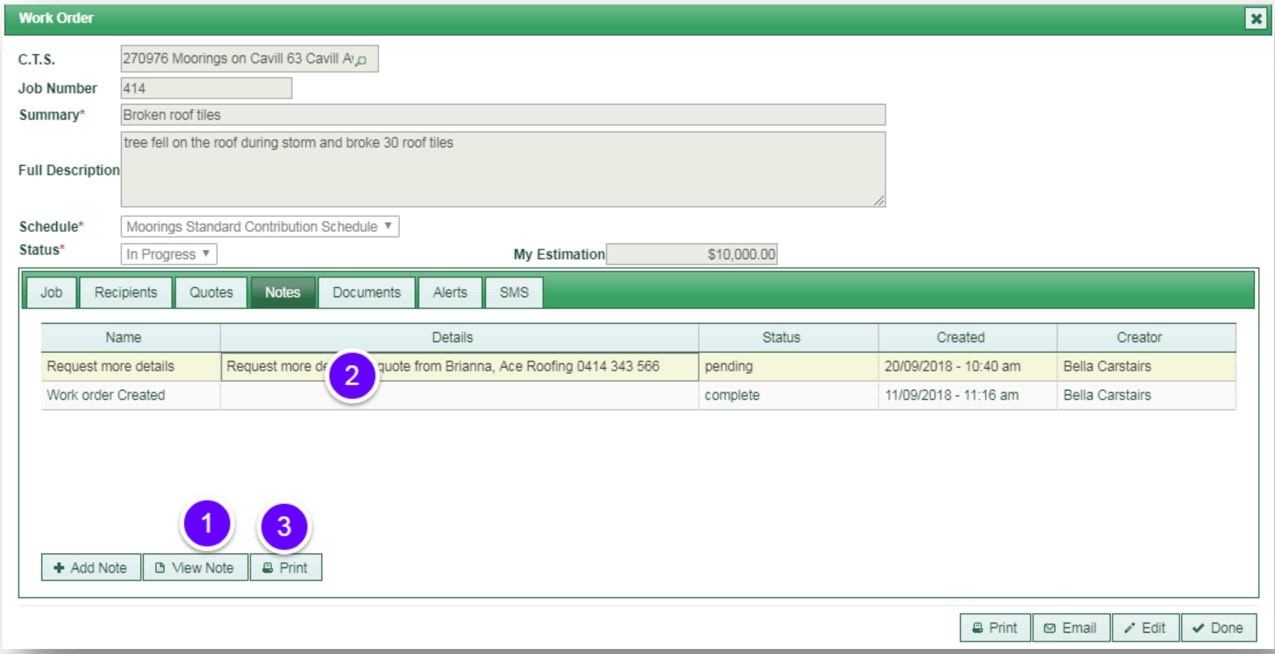


NOTES TAB

1. Click *+Add Note* to create a new note
2. Enter a name for the note, this is what you will see when you look at your diary providing a reminder is set on the note
3. Enter the details of the dote
4. If you select *Pending* as the status, you will be able to set a date and time for the reminder to appear in your diary
5. Use the calendar to select the date and time you want the note to appear on your diary
6. Click *Done* when you have completed entering the reminder time
7. Click *Save* to save the reminder

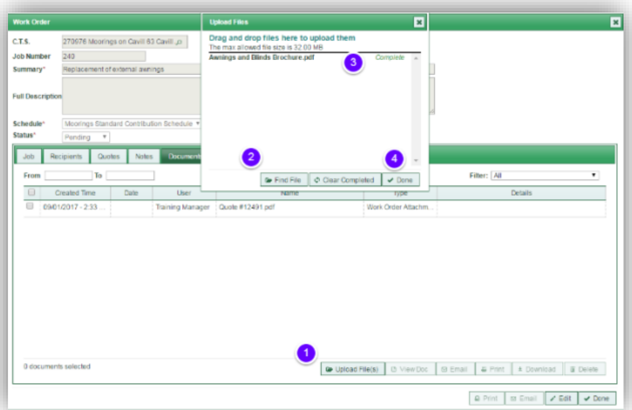


1. To view an existing note, click on the note you want to view to highlight it, and then click *View Note or*
2. Double click on the note you want to view.
3. Click on *Print* to print a PDF of all notes for the work order. This will open a PDF in a new tab



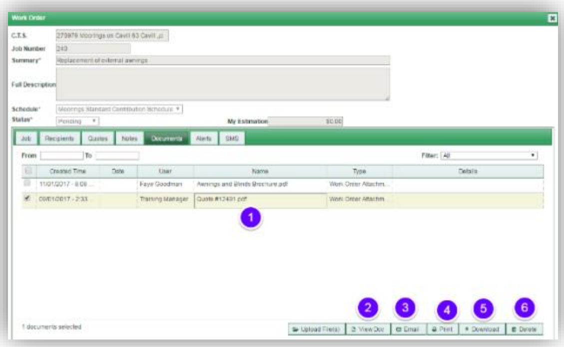
DOCUMENTS TAB

You can upload and store as many documents as you want. Any documents that you attached when you emailed the quote request will be automatically added to this tab. When you process a supplier invoice through the supplier transactions function, and associate it with a work order, the invoice will automatically be stored here.

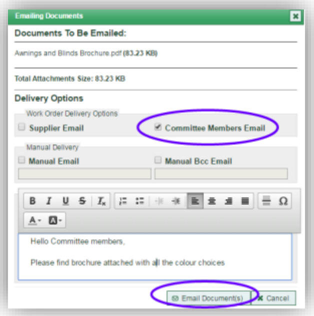


1. Click on *Upload Files* to upload a document.
2. Click on *Find File or*
3. Drag and drop the file here
4. Click *Done* when completed to save the document to the work order

5. You will have a number of options once your document is uploaded.



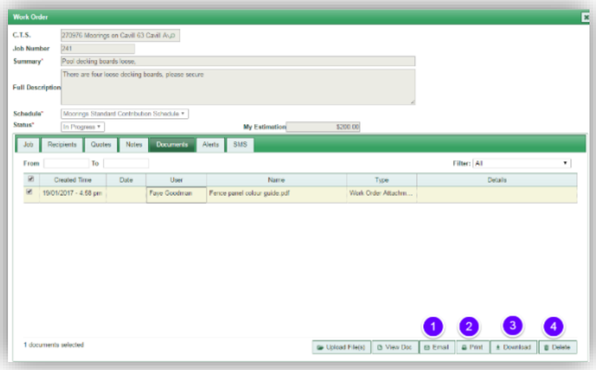
1. Double click to select a document
2. Click *View Doc* to open and view the document
3. Click to email



You can email documents to the supplier, the committee members or email manually to other recipients.
Tick to select the recipients or tick manual email to enter an email address manually.
Enter your message

Select one or more documents and then you can:

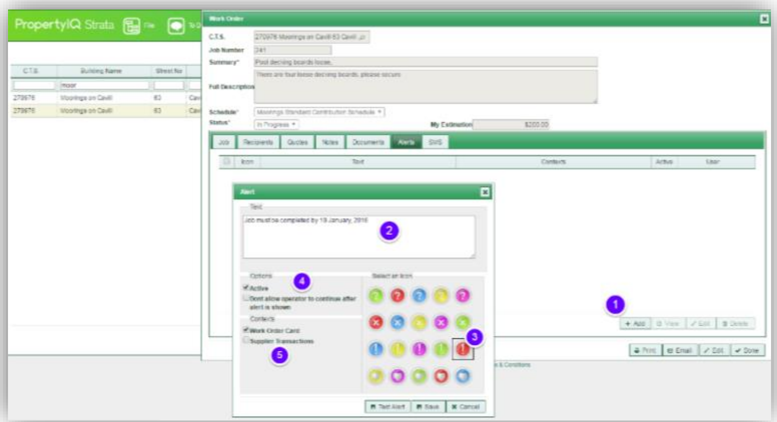
1. Click *Email Documents(s)* to send.
2. Click *Print* to print the selected document(s
3. Click *Download* to download document(s). If there is more than one document selected, PropertyIQ will create a zip file
4. Click *Delete* to delete the selected document(s)



ALERTS TAB

You can add alerts that will pop when triggered by actions

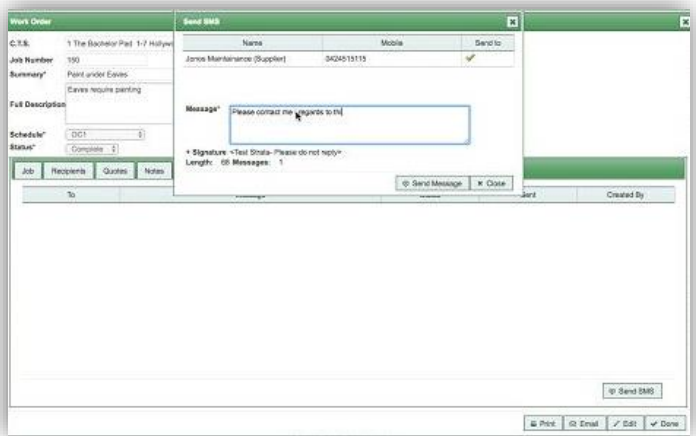
1. Click *+Add* to add an alert
2. Add the alert text
3. Select the icon you want to use for this alert
4. The active box will be ticked by default. You can click here if you want to stop the operator from continuing once the alert is activated
5. Select the event that will activate the alert – either when clicking on the work or when processing supplier transactions for that work order.



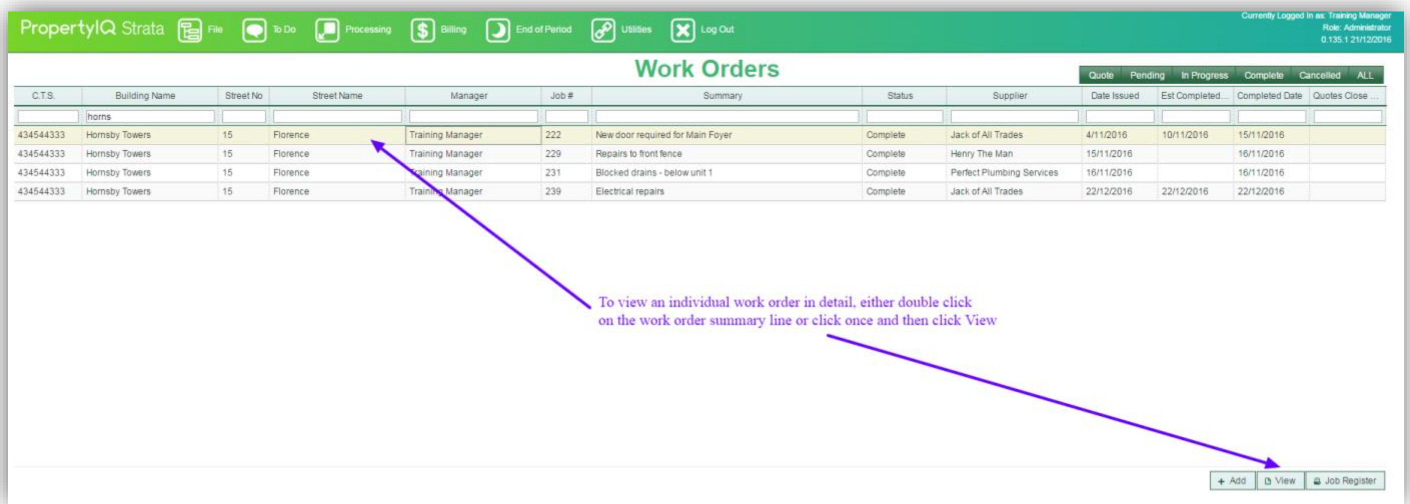
SMS TAB

SMS is available as an addition to your subscription. For more information about SMS, see the manual “SMS”

1. Click on *Send SMS* to start
2. Type your message
3. Click *Send Message* to send the message



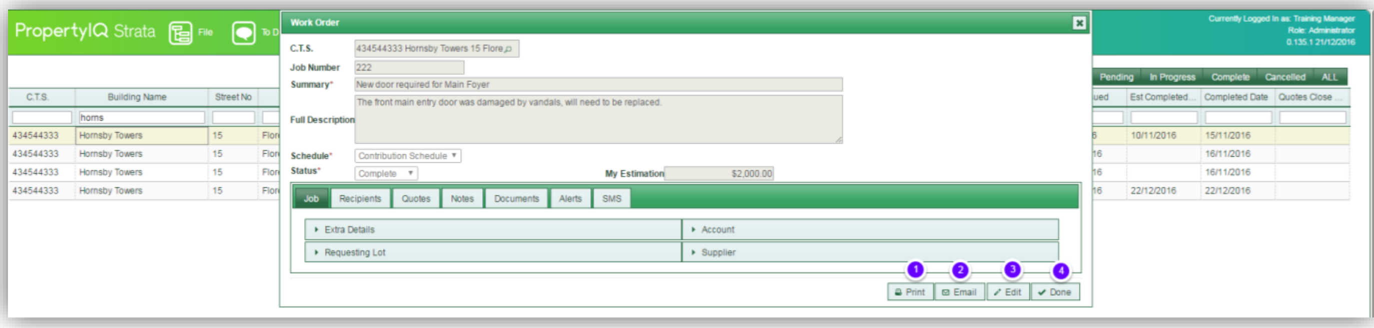
VIEWING AND EDITING AN EXISTING WORK ORDER



You can view and edit existing work orders from the Work Order Screen

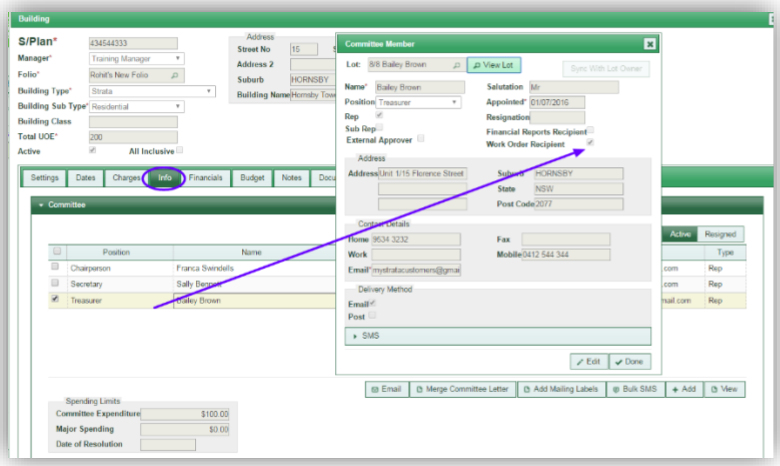
Filter first if you have a lot of records. This screenshot is filtered by building but you can filter by typing key letters in any of the blank boxes at the top

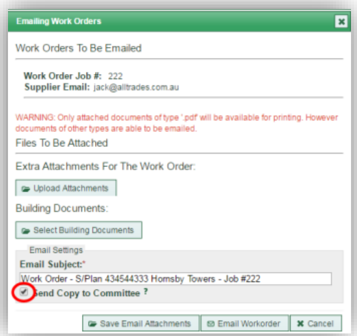
Double click on the work order summary line or click once and then click *View* at the bottom of the screen.



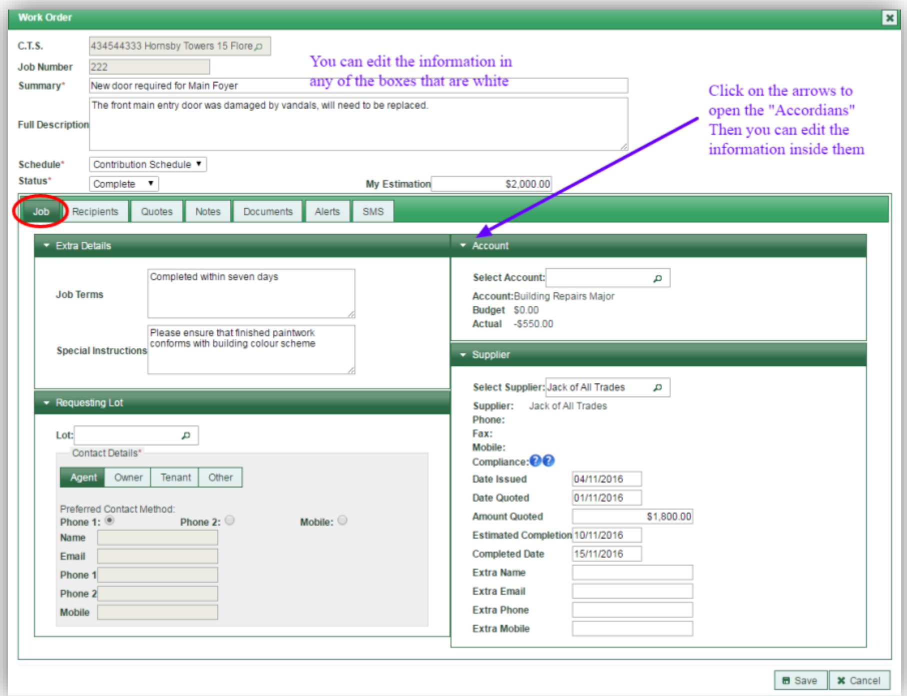
1. Click *Print* to generate a PDF for printing

2. Click *Email* to email a copy to the supplier. You can tick to send a copy to the committee this will only send to committee members nominated as work order recipients on their committee member card.





3. Click *Edit* to start editing. See the section above on adding a work order for a full explanation of each tab.

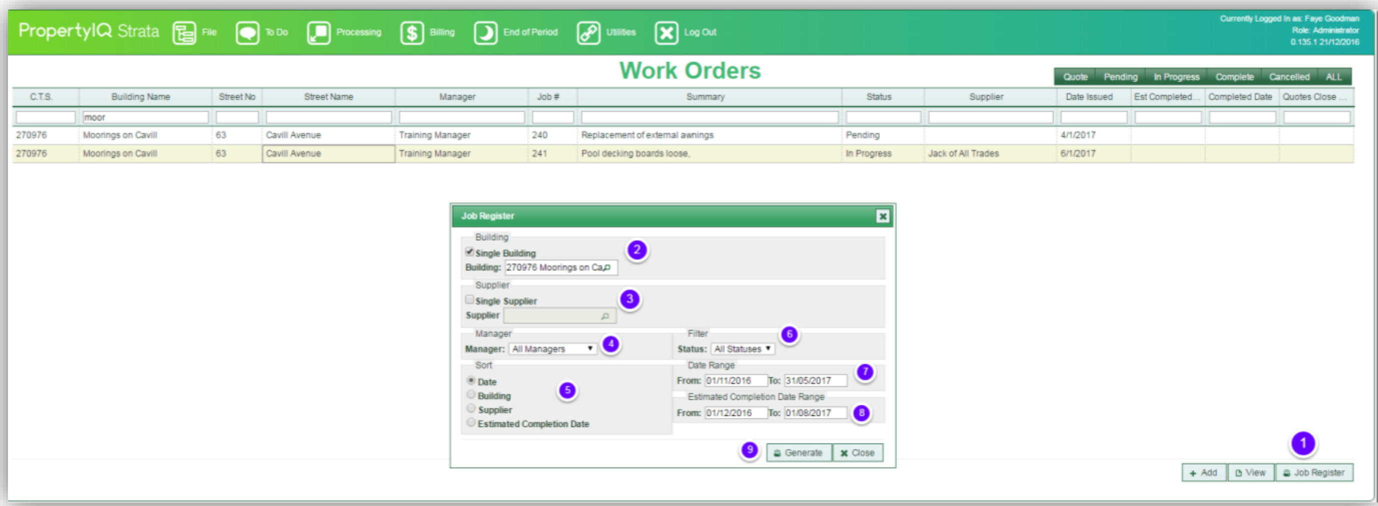


4. Click *Done* when finished

JOB REGISTER

You can generate a job register in PDF format.

1. Click on *Job Register* to get started
2. Tick *Single Building* if you only want to include one building or leave blank if you want to generate for all buildings. If you select *Single Building*, use the search icon to find the building you are looking for
3. Tick *Single Supplier* if you only want to include a single supplier. If you select single supplier, use the search icon to find the supplier you are looking for.
4. The default is all managers. Use the dropdown list to select a manager if you want to generate for just one manager
5. Click to define the sort order
6. The default is all work order statuses. You can select a single status from the dropdown list
7. Enter a date range to filter based on the date the work order was created
8. Enter a date range to filter based on the estimated date of completion that was entered
9. Click *Generate* to create a PDF repot of all selected work orders



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Ph: 1300 724 256 Email: stephanieb@propertyiq.com.au
Printed: 20/01/2017 09:10 am User: Faye Goodman Page 1

Job Register
All Jobs As At 20/01/2017 For All Managers

Date Created	Job#	Building/Supplier	Status	Est Completion Date	Details
08/04/2014	1	SP: 10 Tempo / Jims Mowing	Complete	14/04/2014	Toilet Please quote the fix toilet please complete 3 days fkfsdv
26/07/2014	2	SP: 10 Tempo / Jims Mowing	Complete	31/07/2014	Garden Clean up and hedge trimming Please complete full service on this block during next visit.