

Overview

You will often need to create and send a quote request/s and/or a work order to your creditors for work to be carried out on a property. This article will explain the full process from Adding a Job > Creating a Quote Request > Converting to a Work Order > Completing the Job.

Create the Job (to be completed before sending a quote or work order)

1. Search for the **Property > Tenancy/Management > Initiate Maintenance** at the bottom of the screen (also accessible via the Maintenance tab > Create Maintenance Job)



2. Complete the details:

- Requested By: Agency, Tenancy, Owner
- Job Summary: Brief description of the work. This appears on the owner statement
- Description: More detail to provide to your creditor
- Notification: Select the user. This staff member will receive email notifications of updates on this job
- Add a photo/s (not mandatory)

Maintenance Job - 55 Jackson Avenue KARRINYUP WA

Requested By:

Job Summary:

Description:

Notifications:

Optional: These staff members will receive email notifications of updates to this job



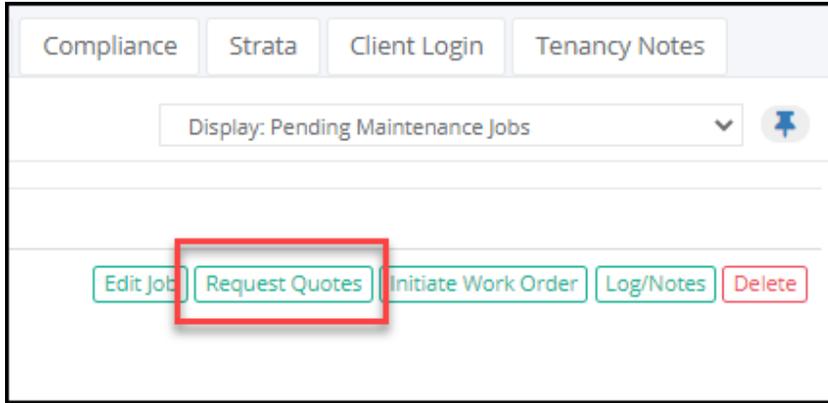
3. Create Job

4. This job will now show in **Tenancy/Management > Maintenance** and the Job Status as **Open**. Options from here:

- Edit Job: To edit the text within the job
- Request Quotes: Send 1 or multiple quote requests
- Initiate Work Oder: Send a work order
- Log/Notes: To make any notes on this specific job
- Delete: to delete the job

Request Quotes > Convert to Work Order

1. Go to **Property > Tenancy/Management > Maintenance > Request Quotes**



2. Complete the details:

- **To:** Add Supplier/Creditor by typing the name. If adding multiple creditors, click on the + tab and add name of the additional creditor
- **Subject:** Will automatically add type of request and property address
- **From:** Select the user
- **Tick** if you want
 - Collect Keys from Office (Displays key number)
 - Show Tenant Names & Contact Information

The screenshot shows the 'Request Quotes' form for '55 Jackson Avenue KARRINYUP WA'. The form has the following fields and options:

- To:** Two input fields. The first contains 'Dave The Handyman' and has a '+' button to its right. The second contains 'Plumbers Pty Ltd' and has a '-' button to its right.
- Subject:** 'Request for Quote - 55 Jackson Avenue Karrinyup'
- From:** 'Sonia Woodhead (sonia.woodhead@vaultre.com.au)'
- Options:** Two checked checkboxes: 'Collect Keys from Office (Display Key#)' and 'Show Tenant Names & Contact Information'.
- Buttons:** 'Send Quote Request' (green), 'Close' (white), and 'Preview: "View Details"' (white with a red border).

You can **Preview** what will be emailed to the creditors via **"View Details"**. See below content:

A. Key number if applicable

B. Tenant contact details

C. Creditor options to Attach Quote or to reply Not Interested. These replies will go to the user who the email came 'From'

To:

55 Jackson Avenue Karrinyup

Owner: Bob Hawke

Property Manager: Sonia Woodhead

Summary: Shower rose is falling off

Details

Please repair the shower rose in the main bathroom. May need to be replaced.

Collect keys from our office No Key ID

[Attach Quote](#) [Not Interested](#)

C

Photos



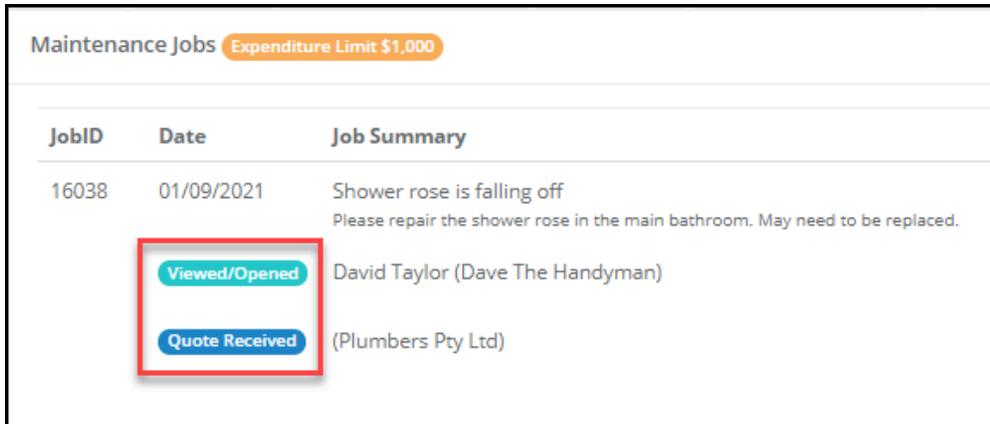
Tenants

Sally Fields (M) 0432 123 453 sally@test.com

B

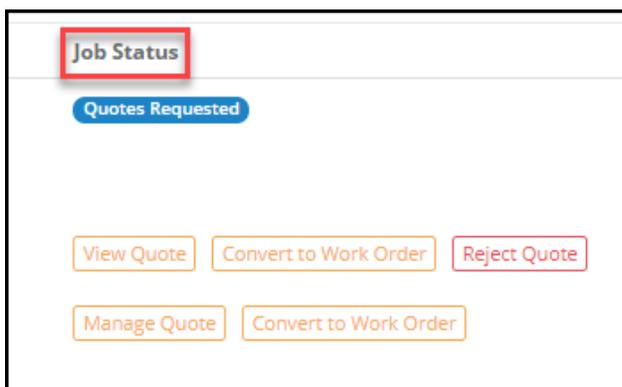
3. Send Quote

4. You can see in **Property > Maintenance** screen when the Creditor has **Viewed/Opened** or sent the quote via **Quote Received**



5. Also on the main **Maintenance** screen, you have options in **Job Status** are:

- **Manage Quote:** Will allow you to Attach Quote, Resend Quote, Reject Quote
- **View Quote:** Will allow you to View, Download, Send as Email
- **Convert to Work Order:** To send the work order
- **Reject Quote:** If you do not want to proceed



Note: If you have requested multiple quotes, when you convert one to a work order, this will automatically reject the other quotes and inform the relevant Contractors.

6. When **converting a Quote to a Work Order**, you have the same options:

- **Tick** if you want
 - Collect Keys from Office (Displays key number)
 - Show Tenant Names & Contact Information plus,
 - Follow Up Work Order

You can **Preview** what will be emailed to the creditors via **"View Details"** and see what options the creditor has:

A. Complete Job & Attach Invoice

B. Advise Job Completion

C. Send Comment/Update

55 Jackson Avenue Karrinyup

Owner: Bob Hawke

Property Manager: Sonia Woodhead

Summary: Mow Lawns

Details

Please quote to mow front and rear lawns

A Complete Job & Attach Invoice

B Advise Job Completion

C Send Comment/Update

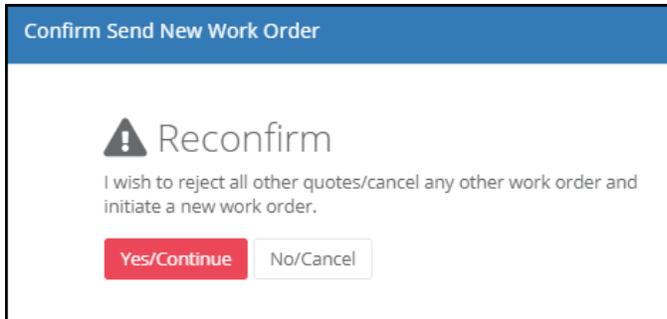
Photos

No photos provided...

7. **Send Work Order**

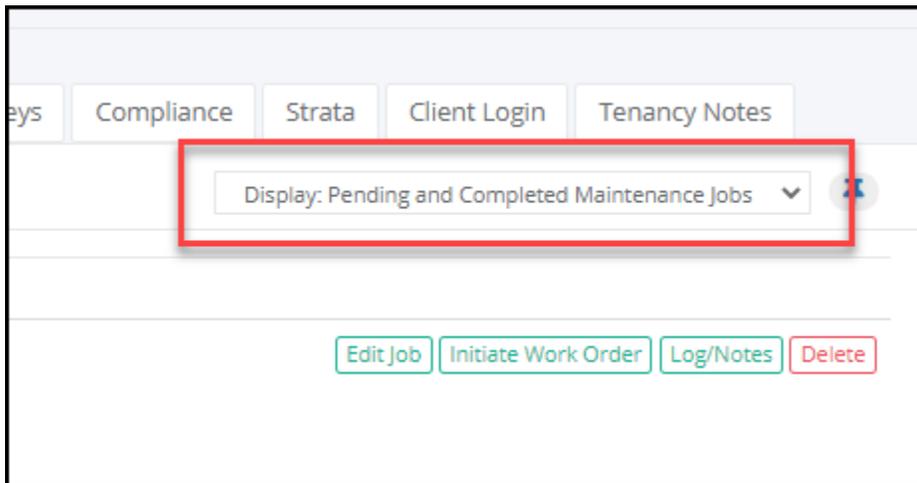
8. The system will double check that you wish to proceed and reject the other quotes

9. **Yes/Continue**



10. Once the **creditor has completed the job**, they can send the invoice directly through the Work Order email

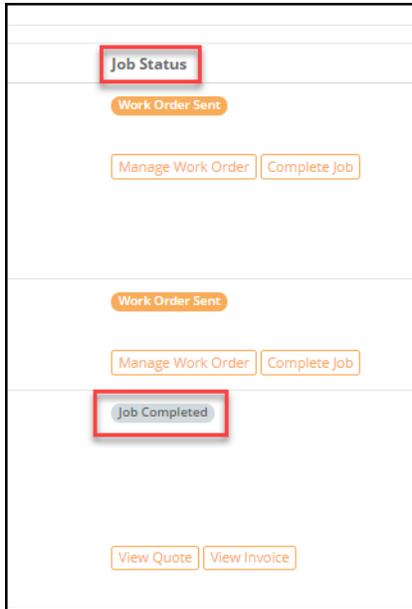
In doing this, the maintenance job will automatically move from the **Pending Maintenance Jobs** folder to the **Pending and Completed Maintenance Jobs** (in the drop down menu on the right hand side)



Other ways of completing the job:

- If you receive the invoice via another method, you can **Manage Work Order & Attach Invoice** which will also **Complete Job**
- If **no invoice** is received (maybe the owner paid directly, you can just **Complete Job** manually

11. Within the **Pending & Completed Maintenance Jobs** screen, you can see that the **Job Status** of the work order is marked as **Job Completed**



12. You can view the full history of the workflow in the **Log/Notes**, which automatically updates itself when a status is changed/updated



13. When an invoice is uploaded to the maintenance job, the invoice is automatically stored in the **Property > Filing Cabinet** and ready to be processed for payment

