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)

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**
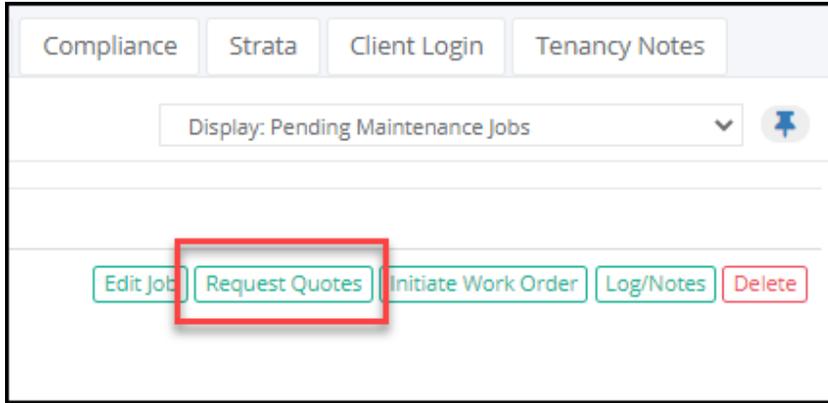
2. Complete the details:

- **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

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'

3. **Send Quote**

4. You can see in **Property > Maintenance** screen when the Creditor has **Viewed/Opened** or sent the quote via **Quote Received**
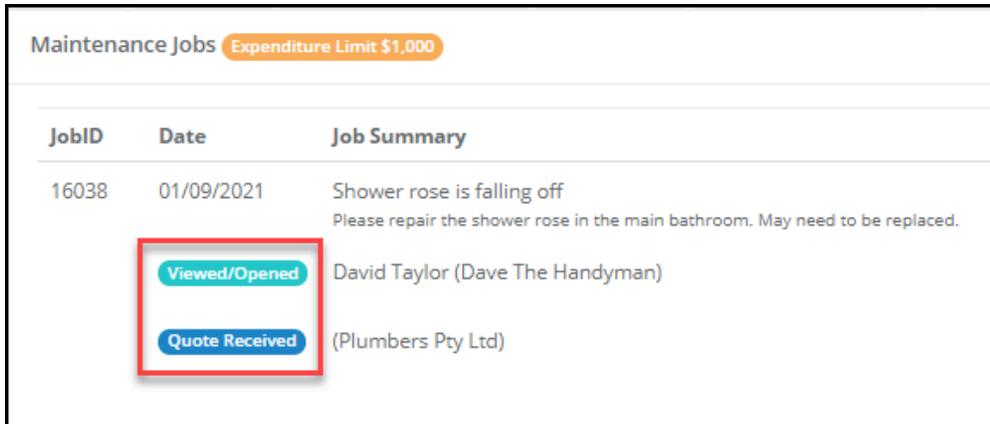
5. Also on the main **Maintenance** screen, you have options in **Job Status** are:

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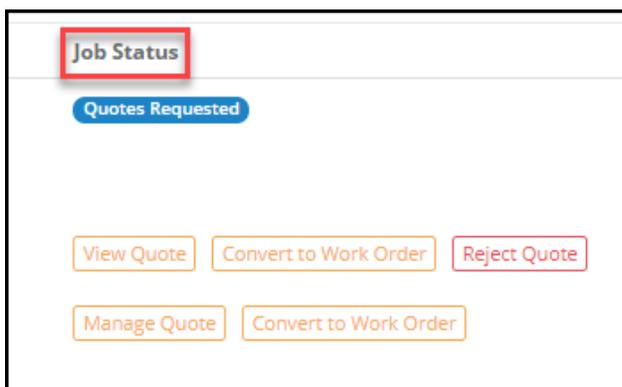
Note: If you have requested multiple quotes, when you convert one to a work order, this will automatically reject the other quotes and inform the relevant Contractors.

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

7. **Send Work Order**

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

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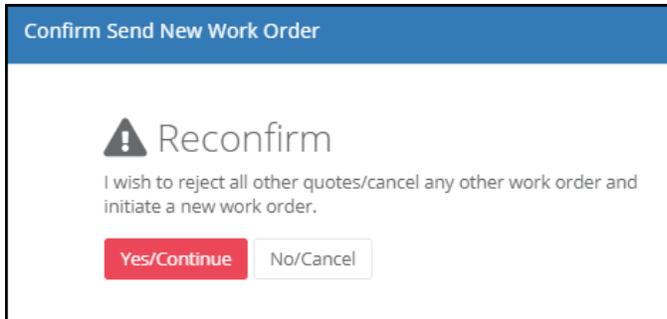
10. Once the **creditor has completed the job**, they can send the invoice directly through the Work Order email

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**)**
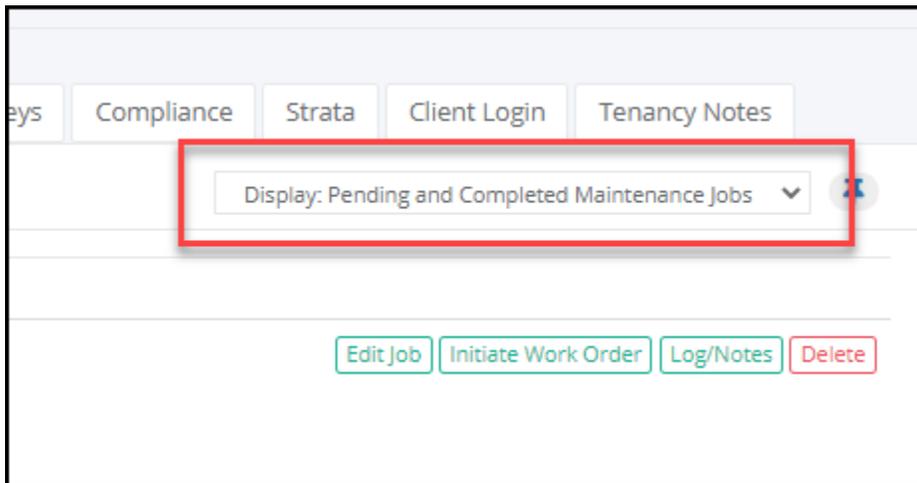
Other ways of completing the job:

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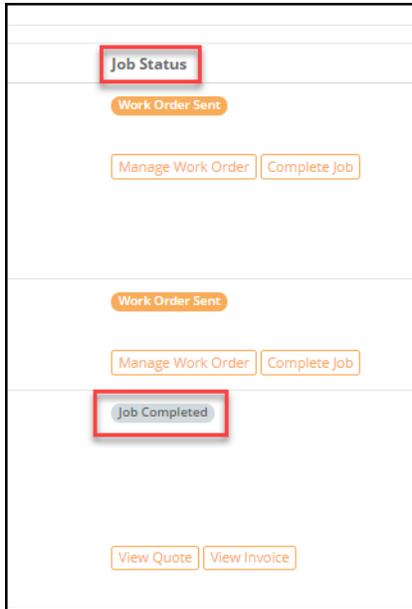
12. You can view the full history of the workflow in the **Log/Notes**, which automatically updates itself when a status is changed/updated

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