TaskMax Work Orders

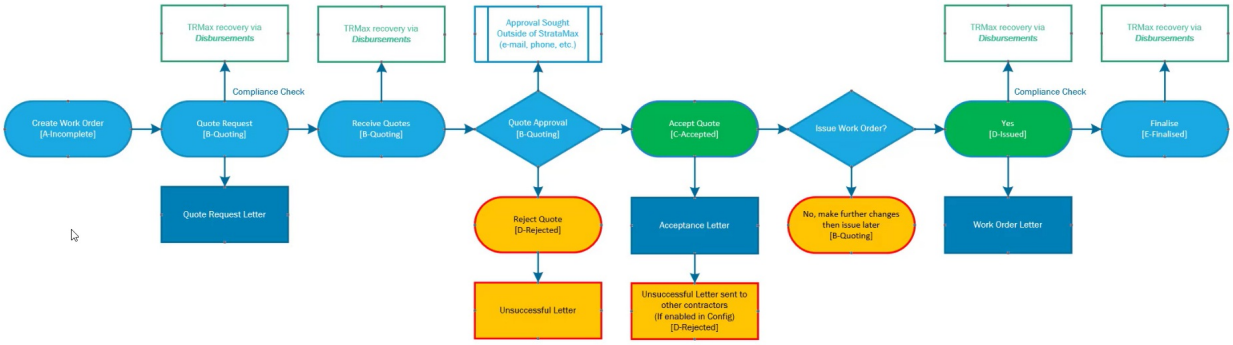
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The instructions in this article relate to *Work Orders* in ***TaskMax.*** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

When a work order is required to be issued and the contractor to do the work is known, the job can be entered and issued immediately. This article covers how to create, issue, and finalise *Work Orders.*

TaskMax Work Order Lifecycle



Create and Issue a Work Order

This section covers the different areas of the work order entry screen, each area with it's own header below.

- Remember to set up your templates first before creating and issuing Work Orders.
- We recommend checking that *Preview Orders* is ticked under the *File* menu. This will allow you to review the content of the Work Order before printing or sending.

1. Search or select ***TaskMax*** and click the *New* button.
2. Select a building from the building list, and click *OK*.

Originator

This is the person who has logged the maintenance call, or if it is the Committee it can be left blank. This can be their physical address, email address or both. TaskMax will print the letter if the physical address is selected, as long as the *System Setting* 'Use Letter for Originator' is ticked.

1. When the *Job Entry* screen appears, enter the *Originator* details. This can be done in various ways:
    - Manually type the appropriate details in each field: name, address, phone numbers, fax, email.
    - Click the *List* button and select an *Originator* from the table. These are *Originators* that have been entered and used previously.
    - Click the *Roll* button and select a lot owner.
2. Tick the box next to the preferred contact method for the Originator.

Contact

This is the person the contractor can contact whilst on site.

1. Enter the *Contact* details using one of these options:
    - Click the *Originator* button to copy the Originator details above.
    - Manually type the name in the top field and phone numbers in the other fields.
    - Click the *List* button and select an *Contact* from the table. These are *Contacts* that have been entered and used previously.
    - Click the *Roll* button and select a lot owner.
2. Tick the preferred contact method, which will be the only one that displays on the work order.

Invoice

It's not recommended to fill in any details in this section if you are using DocMax to enter invoices, and then processing them via the ***Creditor Invoices*** screen.

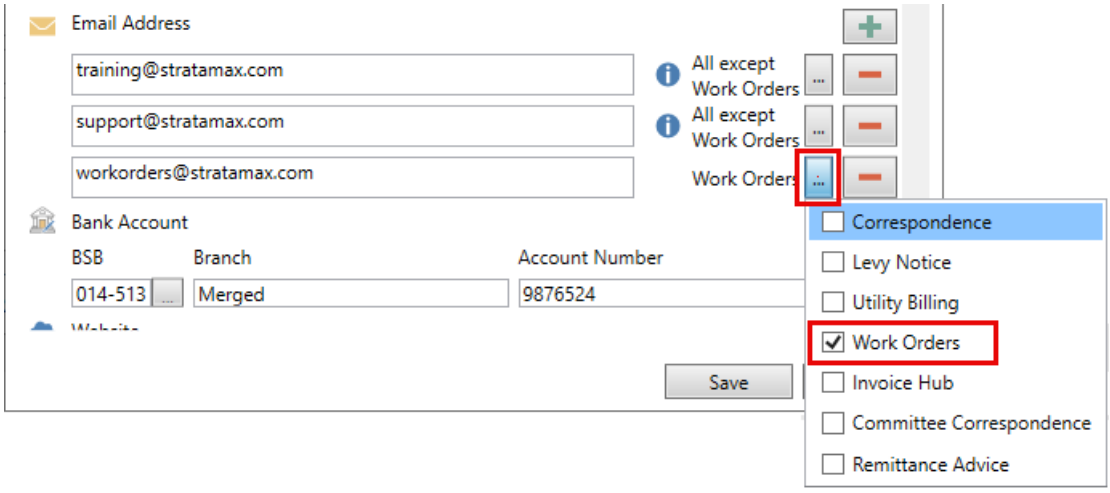
Job

1. Type in the *Subject* field in the *Job* section, or select from the subject list by clicking the ellipsis *[...]* button. These will be the details for the invoice.
2. In the large field beneath the *Subject*, type in the job details.
3. Click the *Property Affected* field and the *Common Property* or *Select Lot Account* button.
    - The *Edit Property List* button will open the ***Property Details*** screen.
4. Manually type the *Location at Site* if required, and tick the *Urgent* box if the work order should state the job is urgent.
5. *Start* and *Finish* dates can be typed in manually, or by double-clicking each field, a calendar prompt will appear for selection.

Contractor

If quotes need to be requested, these steps should not be done yet. Please read the ***TaskMax*** *Quotes article* for more info.

1. When ready, click the *List* button in the Contractor section to open the *Account Code List*.
2. *Show Preferred Creditors Only* tick box can be ticked only to display preferred creditors.
3. Click the *Master Chart* button to display all creditors in the StrataMax Master Chart.
4. Click the green + button to add a new contractor contact.
    - The contractor's contact can have a separate email address if required to send the work order. If this is not needed, the email address for all purposes will be used.



5. Click the *Issue Job* button.
    - The work order will be issued depending on the preferred contact method (emailed, faxed, or printed).

Other

1. *Insurance Claim:* If this box is ticked after clicking the *Issue Job* button, the ***Insurance Claims Register*** will appear, automatically creating a new insurance claim. See *How to create an Insurance Claim* for more info.
2. *Service Fee:* Tick to automatically enter the configured amount into the *Service Fee* field in the *Invoice* area. See the *Invoice* section above.
3. *Bill Lot Owner:* Tick to select the owner who will be charged the *Service Fee.*
4. *Notify Manager:* When ticked, the account manager will also receive a separate copy of the work order via email. The email address used will be whatever is entered into the ***Account Manager Edit*** screen.
5. *Email Copy to:* Click the field to add any additional recipients who need to receive a copy of the work order. **Please note that the Email Copy to field is available for Work Orders only.**
    - Tag the recipient, then click *OK* to select that recipient.

- Click the *New* button to add a new recipient.
- Click *Add Office Bearer* to select a committee member in the building.
- Tag the recipient, then click *Contact* to open a window with various contact methods (email, phone, SMS).
- Tag the recipient, then click *Edit* to edit the recipient's details.
- Tag the recipient, then click *Delete* to remove the recipient.

6. *Don't Print Order on Issue:* Tick to not print or email the work order when the *Issue Job* button is clicked.
7. *Extra Attachments:* Click to add additional files from Windows or DocMax.
    - The attachment is just for the purposes of sending files with a quote request or work order, so the extra attachments will not display when opening the work order record again, and will need to be attached each time.

Issue Job

1. Click the *Issue Job* button.
2. If the work order appears on screen in a preview window, you must click the *Printer* button in order for the work order to be issued correctly, and for the status to update. It will also ensure the contractor receives the work order according to their contact preferences, in their ***Creditor Maintenance*** record. If the order is previewed and closed this will not finalise the sending process for creditor.

Change the Job Manager

1. Click the ellipsis *[...]* button next to the *Job Managed By* field in the top right.
2. In the new window, select the Job Manager, then click the *Edit* button to enter the email address.

View Issued Jobs

Please note that work order that have a status of *D-Issued* cannot be amended or changed. In these cases the work order should be cancelled, where you will be prompted whether or not you would like to make a new order from the cancelled one.

1. Search or select ***TaskMax***.
2. In the *Options* section, mark the required settings:
    - *All* to show all buildings or *This Building* to show records for the current building.
    - *All* to show all jobs for all users or *Mine* to show only jobs logged by the user.
3. In *View Status*, choose the required view status.
4. *Current* to view all active jobs – Incomplete, Quoting, Held Payment, Issued.

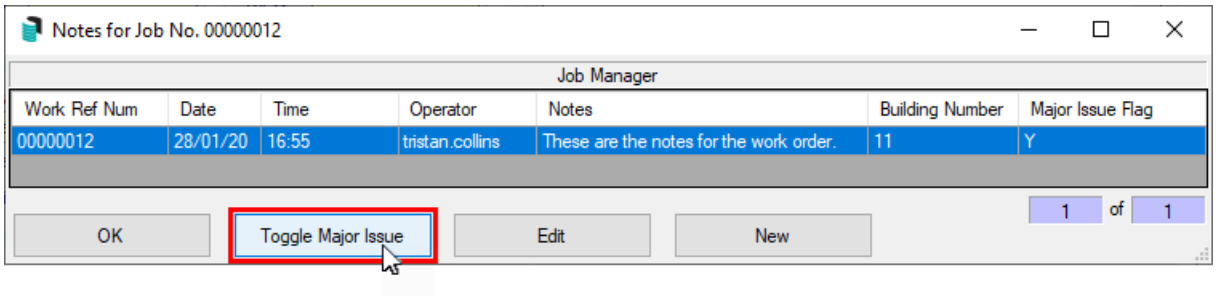
- *Periodic* to view periodic work orders.
- *Finalised* to view completed jobs.
- *Future* to view jobs setup for future dates.
- *Cancelled* to view cancelled jobs.
- *Current & Finalised* to view all active and complete jobs.

5. The jobs for the selections that have been made will appear. Further filtering can be done and reports can be printed if required.
6. In the list of work orders click in the column to filter.
7. Right-click the record:
   - Select Filter By: (your selection).
   - Repeat filter steps as required.
8. Right click on any record, and click *Quick Report.*
   - A report will then be generated with the filter settings that are in place. The filters can then be removed.
9. Right click on any record and select *Clear Filter.*

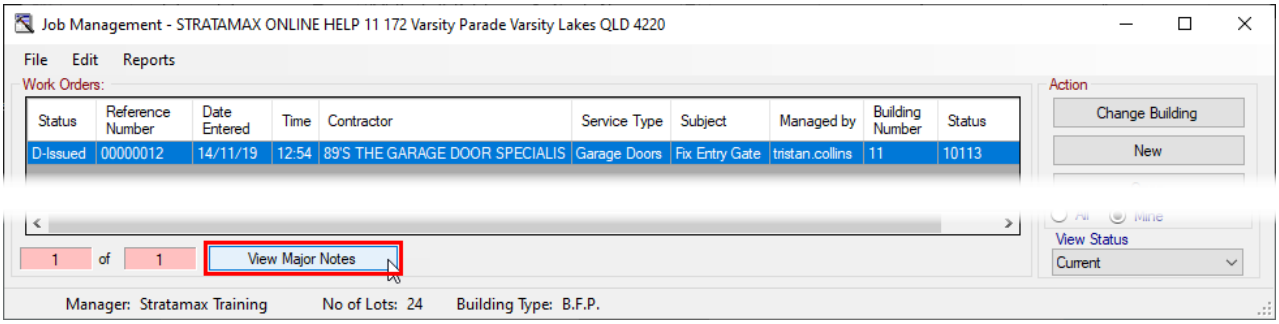
Please note that for work orders issued with attachments, the ***Communication*** Log will confirm both the work order and the attachment(s) sent to the contractor.

Work Order Notes

Notes can be added to any work order for internal reference only, so these notes will not print on any work orders or reports. When notes are added to a work order, they can be flagged as a major issue by clicking the *Toggle Major Issue* button.



Back in the main ***TaskMax*** screen, the *View Major Notes* will be displayed at the bottom, beneath the list of *Work Orders* or *Quotes.*



Finalise Work Order

Once the job has been completed and the invoice is received, the job can be finalised. If invoice details are required to be entered to create creditor invoices via TaskMax, then follow the below steps. However, if creditor invoices are first saved to ***DocMax***, then processed in ***Creditor Invoices***, you can select and finalise the Work Order there; see the information in the *Select Work Order (ellipsis)* guide.

1. Search or select ***TaskMax***.
2. Click the *Change Building* if required.
3. Select the job and click *Open*.

Creditor invoices can be configured to automatically be created from ***TaskMax*** once the invoice details have been entered in the job. *Invoice Date* for finalised Work Orders are not restricted to being within the current or next month's only (i.e. backdated entries are OK). However, now the invoice date is optionally restricted to being less then the *Next Current Month End*. This is to prevent any accidental data entry of incorrect future dates.

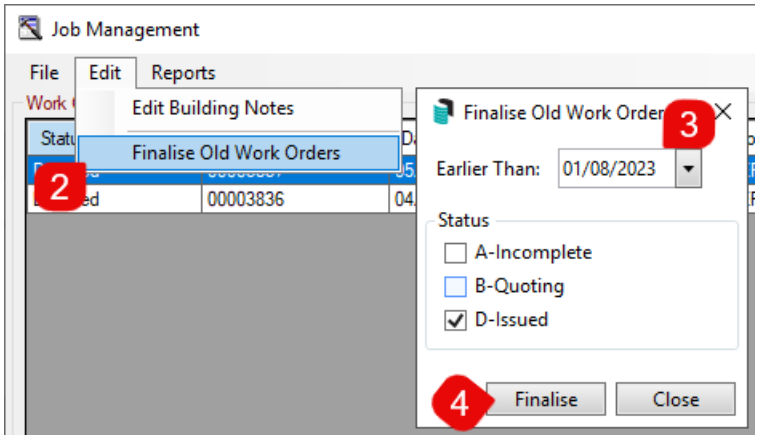
This can be disabled as an optional *System Setting*. The two system settings that should be reviewed and selected include *Restrict Invoice Date when Finalising WorkOrder <=Current Month End +30 days),* and *Auto Create Creditor Invoices*. Review the below steps to include the *Invoice* details.

1. In the invoice section, click the box and select the expense code. Click *OK* (single entry).
    - If a multi-expense item, right-click > *Set to multi expense code* and choose the first expense code.
2. Enter the *amount* - if a quoted job, compare the quoted amount > *OK* (for all entry types).
    - If selected for multi-expense, repeat for the next expense code and enter the amount and details.
3. Enter the *Invoice Number* (for single entry).
4. Enter the date (for single entry).
5. The details will be copied from the *Subject* field of the job - edit as required (for single entry).
6. Enter *Y* to the question *OK to Pay* (for all entry types).
7. Click *Save* and *Yes* or *Finalise.*
8. If *Auto Create Creditor Invoices* is ticked in *File* > *Configure,* the balance will be waiting in ***Payments***.
    - The status of the job will now be *E-Finalised*.

Finalise Old Work Orders

There may be instances where Work Orders or Quotes have been started, but not completed or sent. These old jobs can be closed.

1. Search or select ***TaskMax***.
2. Select *Edit* > *Finalise Old Work Orders.*
3. Select a date, only jobs that fit the status criteria below and are older than this date will be finalised.
4. Click *Finalise*.



5. A message will appear to indicate how many jobs will be affected - click*Yes* to confirm.
    - If there are no outstanding jobs that match the criteria, a pop-up will indicate that.

Understanding Finalised Work Orders and Service Fees

Please be aware that the below service fees will only be processed if the appropriate settings have been configured in *File* > *Configure* > *Service Fees Setup for TRMax and GLMax processing*

> We recommend using ***Disbursements*** to set up recoveries for work orders and quotes.

The account code that is selected should be the same as the code that the recovery code is linked to, so when the month end process is undertaken the amount is contra'd off. The following transactions are processed in the general ledger when the work order is finalised:

Creditor Account	CR Amount of invoice
Expense Code	DR Amount of invoice
Service Fee Code	CR Service Fee amount
Expense Code	DR Service Fee amount

When a ***TRMax*** recovery is recorded, the following transactions are processed in the general ledger:

Strata Manager Creditor	CR Service Fee amount
Service Fee code	DR Service Fee amount

Cancel Work Order

Only jobs that have a status of *B-Quoting* or beyond can be cancelled. Jobs with a status of *A-Incomplete* can be deleted.

When a work order is cancelled, ***TaskMax*** is designed to automatically send cancellation letters to contractors. Therefore, we recommend enabling the *Preview Orders* setting under the *File* menu.

1. Search or select ***TaskMax***.
2. Locate the job in the list and click the *Open* button to open the job details.
3. Click the *Cancel Order* button.
4. Depending on the status of the job, a prompt will appear asking you to confirm the cancellation.
5. After clicking 'Yes' to the confirmation, you will need to type in a reason, and then click *OK.*
6. Depending on the status of the job, a variety of cancellation letters will be displayed on screen.
    - For example, if quote requests have been sent to 3 different contractors, and none of them have been received, 3 different 'Quote Cancel-Sent' letters will be displayed.
7. You may choose to not send these letters by simply closing the preview window, or click the printer button to print or email the letter (this depends on what option is selected for each contractor in the *Issue Work Orders by* field in ***Creditor Maintenance***).
8. You will then be asked *'Do you want to make a new order from this one?'.*
    - If you click *Yes,* a new job will be created with a status of *A-Incomplete,* retaining all the details from the original job, except without any contractors assigned to it.
9. The job will now have a status of *G-Cancelled.*

Retrieve Cancelled Work Orders/Jobs

1. Cancelled jobs can be viewed by selecting 'Cancelled' from the *View Status* drop-down menu, in the bottom right of the main menu of ***TaskMax***.
2. You can then open the job and request more quotes or issue the work order again.
    - If you request quotes, the status of the job will change to *B-Quoting.*
    - If you issue the job, the status of the job will change to *E-Finalised,* and can be 'unfinalised' to

change the status to *D-Issued.*

Work Order Disbursements/Recoveries

In ***Disbursements***, charges can be configured for TaskMax work orders and their related quotes, and can be set up to create records for the following items in ***TRMax***, which can then be processed in ***Process Recoveries***:

- Requesting Work Order Quote
- Receiving a Work Order Quote
- Issuing a Work Order
- Finalising a Work Order

When quotes are requested or received and work orders are issued, the details will be displayed in the ***TRMax*** notes field on the main screen, as well as ***TRMax*** reports:

- TaskMax Job Type
- Building Number
- Reference of the TaskMax Request/Job
- Contractor Number
- Contractor Name
- Subject of the TaskMax Job