



**MAINTENANCE
COMPANION**

We Trim Your Admin

Setup Guide

Setting Up Your Team, Work Orders, and Properties

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Team:

1. Set Team Rates

- Begin by establishing the hourly rates for your team members or any equipment you bill by the hour.
- These rates are only visible to admin users and will be linked to individual team members.
- For example, you might set a Team Leader at \$60.00 per hour and a Crew Member at \$50.00 per hour.

2. Organize with Scheduling Categories

- Group your team members and subcontractors using scheduling categories.
- This simplifies scheduling by ensuring you only see the relevant team members for each job.
- Team members can belong to multiple categories, such as Maintenance, Gardening, or Cleaning.

3. Add Your Team Members

- Enter your team members so they can be scheduled for work orders.
- You can invite them to use the app or just set up their email to receive notifications.
- Team members can be assigned to one or more scheduling categories and given a default rate, which can be overridden per work order if required.
- Admin users always need app access and can view everything, while other team members can have restricted access, either to all jobs or just those they're scheduled on.
- You can also allow certain team members, like Team Leaders, to input times for the whole group.

4. Add Subcontractors

- Set up subcontractors so they can be scheduled onto work orders.
- Invite them to the app if needed. They'll only see jobs they're assigned to.
- Subcontractors can receive email notifications, be grouped in scheduling categories, and have standard fees set, which will automatically be applied to their jobs.

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Work Orders:

5. Define Services

Create services that reflect how you invoice your customers. These should align with your accounting system for easy integration.

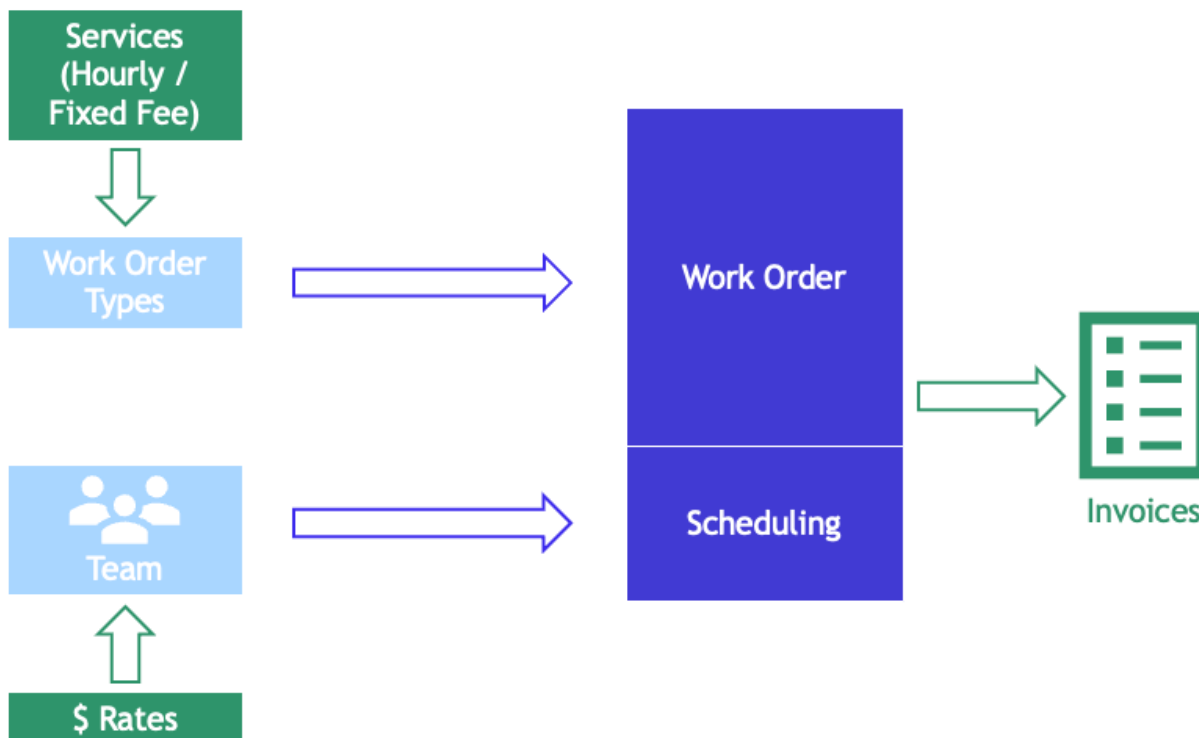
Services can be set up as hourly, fixed fee, or not invoiced (this is useful for tracking work that doesn't require billing).

6. Set Up Work Order Types

Work order types provide clear descriptions for your team and customers/property owners. Each type links to a service, determining how it will be invoiced.

Multiple work order types can be grouped under a single service for streamlined invoicing, while still providing detailed work descriptions.

Work order types control features on work orders, such as whether property lists are available or whether the work order type is visible to property owners.



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Properties:

7. Add Properties

Every work order is tied to a property.

For each property, you can store the address, image, account reference, alarm code, and attach useful documents or photos, like equipment manuals or preferred furniture layout pictures.

8. Link Property Owners

Associate property owners' emails so they can receive email notifications about work orders. Owners can be invited to access their property in the app, and they can then invite others as well.

One owner can have access to multiple properties if needed.

9. Create Property Lists

Property lists help admin teams efficiently create multiple work orders at once.

When you select a property list instead of a single property, a work order is generated for each property. This is perfect for teams working on regular routes, where a set of work orders can be created for that route in one simple step.

The order of properties in your list is preserved, helping teams follow their daily schedule logically.

10. Create Checklists

Use checklists to break down the tasks for each work order.

You can create checklists that are available for all properties or customize them for specific properties (using a global checklist as a starting point).

The order of checklist items is kept, guiding team members through their tasks efficiently.

Once checked in, team members can mark items off as they're completed.

Team members can also add notes and images to checklist items.

With these simple steps, you'll have your Maintenance Companion app set up and ready to streamline your team management, scheduling, and property maintenance.