



MAINTENANCE COMPANION

We Trim Your Admin

Managing Properties

Sections:

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Managing Properties

Each work order created is associated with a property.

Against the property as well as storing its address, you can:

- Link it with the property owners and give them access to their property on the app.
- Attach documents and images, such as a preferred layout of furniture, to keep a repository of all key details against that property.
- Determine the billing category for the property.
- Securely store alarm and access codes.

As an Admin User, you can easily add, update, and view properties.

1. From the main menu, click on “Properties”, and select the first item, “Properties”. This will take you to the properties management page.
2. To add a new property, click on the “+” sign. This will open up a new property entry form.
3. Complete the details about the property by filling in the mandatory sections, which are indicated by a red star. Make sure to provide accurate and comprehensive information to ensure smooth communication and efficient maintenance. Take note that the “Billing Category” field is a drop-down list for you to select the type of property. Choose between “Full Service”, “Seasonal”, or “Ad Hoc Requests”. You can also upload an image of the property to add visual context.
4. Once you have filled in all the necessary details, click on the “Submit” button to save the property information.
5. After submitting, the screen will redirect you back to a list of all properties in your portfolio. Here, you can easily view and manage all your properties in one place, making it convenient to stay organized and up-to-date.

Moving forward, it is essential to ensure that property owners have been invited to use Maintenance Companion. This step will allow them to access the system, view property details, and communicate with your team effectively.

Property Owners

You can set up one or more property owners for each property.

Once an owner's email has been entered, they can start to receive notifications for planned, scheduled, completed, and cancelled work.

Inviting Owners to the App

To give owners access to the app, select the Send Invite On Submit option. This will send them an invitation email, allowing them to set up a password and log in.

Registered property owners can manage their notification preferences through their User Preferences.

Property Owners can manage their own owners list

Property owners can also add other owners to their property.

Property Lists

Property Lists are an option found under the Properties menu. They allow you to group properties into an ordered list.

- You can use a property list to generate multiple work orders in a single step, as long as the work order type supports it.
- This creates a separate work order for each property in the list, which can then be managed individually.
- The order of properties in your list is saved, and you can easily change it by dragging and dropping them into a new position.

Checklists

Overview

Checklists are designed to enhance work orders by providing clear instructions and ensuring tasks are completed efficiently. They help:

- Define a clear set of expectations for work order completion.
- Allow maintenance teams to track and check off completed items.

List Types

- Ad Hoc List – A checklist created at the time of work order creation.
- Property Specific List – A checklist created ahead of time and available for a work order on that property.

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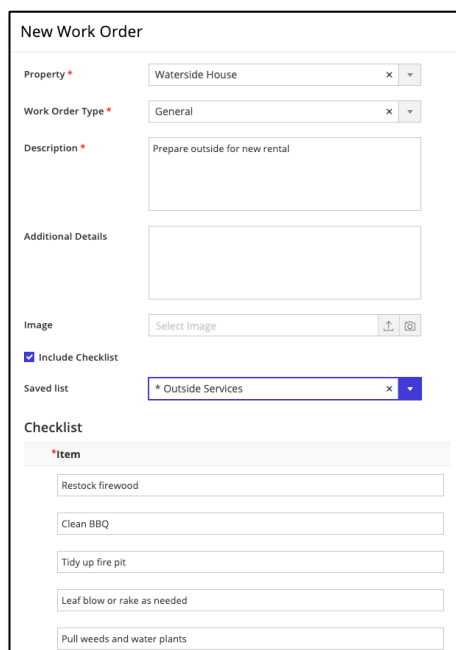
- Global List – A checklist created ahead of time and available for any work order on any property.

Adding a Checklist to a Work Order

When creating a work order, a toggle box labelled 'Include Checklist' is available. If selected, two additional fields will appear:

- Saved Lists – A dropdown list displaying saved checklists, showing Property Specific Lists first, followed by Global Lists.
- Checklist – If a saved list is selected, the checklist will be pre-populated with the saved list.

Within the checklist section, items can be edited, reordered, deleted, or new checklist items can be added. The checklist is saved along with the work order.



The screenshot shows a 'New Work Order' form. The 'Property' field is set to 'Waterside House'. The 'Work Order Type' is 'General'. The 'Description' is 'Prepare outside for new rental'. The 'Additional Details' field is empty. The 'Image' field has a 'Select Image' button. The 'Include Checklist' checkbox is checked. The 'Saved list' dropdown is set to '* Outside Services'. The 'Checklist' section contains five items: 'Restock firewood', 'Clean BBQ', 'Tidy up fire pit', 'Leaf blow or rake as needed', and 'Pull weeds and water plants'.

Editing a Checklist

The Edit Checklist option is available in Work Order reports if the work order is not In Progress, Completed, Cancel Requested or Cancelled.

A checklist can be added even if one was not originally included.

Users can select a different saved list, add, remove, reorder, or edit checklist items.

Viewing a Checklist

Progress

The work order report includes a Progress column, displaying completed and total checklist items (e.g., "2 / 5").

Work Order Detail View

Displays checklist items, completion time, the user who completed them, any notes, and status.

Note: Property Owner Access

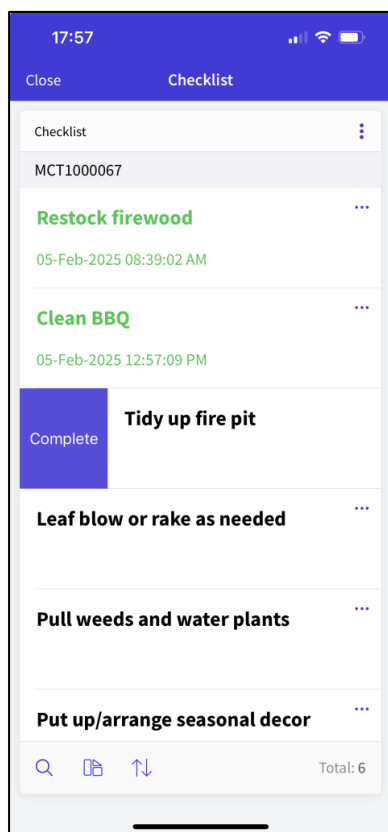
Property Owners can view Checklist Progress and the checklist in the detail view, but they cannot see the user who completed tasks or any added notes.

Completing Checklists

- Checklist items can be marked Completed when the work order status is In Progress.
- The checklist option appears in reports, allowing users to mark items as Completed.
- Users can reset the status if marked Completed by mistake.
- Notes can be added when editing a checklist item.

Note: Mobile Users

In the mobile app, users can swipe to mark checklist items as Completed.



Creating Saved Checklists

Checklists can be created in advance as either a Property Specific List or a Global List under the Property menu section.

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List Name:

A mandatory, unique identifier that appears in work order dropdowns. Global Lists are prefixed with an asterisk in work order dropdowns.

Property:

An optional field. If left blank, the checklist becomes a Global List. Property field is optional.

Global List:

If a property is selected, users can start with an existing Global List to create a Property-Specific List.

Checklist:

Items can be added, edited, removed, and reordered via drag-and-drop functionality.