MAINTENANCE COMPANION

We Trim Your Admin

Admin Options

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Admin

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1. Admin Options

Team	Set up your team members and their access
Subcontractors	Set up subcontractors so they can be scheduled
Scheduling Categories	Groupings for team members and subcontractors to simplify selection
Broadcasts	Send notifications to the team or property owners
Extracts	Creates an extract for external reporting
Work Order Types	Describes the work to be delivered and specifies the parameters of the work order.
Services	Defines how the work will be invoiced, and links to accounting system.
Rates	Defines rates that can be associated with team members.
Company Settings	Company information that can be updated as required, along with links to Maintenance Companion billing and company metrics.

2. Team

This is a list of team members, that will be scheduled onto work orders.

- You can invite them to use the app or set up their email for them to only 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. Rates are only visible to Admin users.
- 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.
- Any equipment that is also invoiced to customers on an hourly basis can also be set up as a team member.

3. Subcontractors

External subcontractors can be set up in the same way as internal team members, allowing them to be scheduled for work orders. Subcontractor invoicing assumes that a set fee will be charged for their services.

- Scheduling categories should be set up for subcontractors in the same way as team members.
- Optional fields exist to store a flag regarding their WSIB and Liability Insurance, along with an expiry date against flag.
- It is possible to add attachments against subcontractor records, for example if a copy of their insurance certificate is required.
- Subcontractors can be invited to access the app. They'll only see jobs they're assigned to.
- Alternatively, subcontractors can be set up to receive email notifications, without access to the app.

4. Team and Subcontractor – Access and Roles

Find out how to get your team set up with the correct access and notifications for the app.

Office based team members will typically be set up as admin user with the field team set up with access to either all work orders or just to work orders they are scheduled against.

- It is possible for the admin users to also be scheduled, by selecting "Can be Scheduled" and adding their scheduling categories.

- At least one admin user is required to be set up and registered.
- If you want the user to be able to access all work orders, they must be registered.
- To be scheduled against work orders, a Name, Scheduling Category and Rate need to be set up.
- Team members will have access to work orders they are scheduled against and it is optional for these users to be registered.

Menu Access

Menu Options	**Admin User**	**Access All Work Orders**	**Team Member or Subcontractor**
	Full access for all set up and access to all work orders	*Access to all work orders and scheduling*	*Access just to work orders they are scheduled against*
Work Orders	Work Orders My Scheduled Work Orders All Scheduled Work Orders Work Order History Reminders	Work Orders My Scheduled Work Orders All Scheduled Work Orders Work Order History Reminders	My Scheduled Work Orders
Calendars	Requested Calendar Scheduled Calendar Team Schedule	Requested Calendar Scheduled Calendar Team Schedule	
Properties	Properties Property Owners Property Lists Checklists		
Invoices	Create Invoice Invoices Invoice History		
Admin	Team Subcontractors Scheduling Categories Broadcasts		

	Extracts Work Order Types Services Rates Company Settings		
User Preferences	User Preferences	User Preferences	User Preferences
Help & Support	Help & Support	Help & Support	Help & Support

5. Scheduling Categories

These are used to group your team members and subcontractors to simplify team selection when scheduling work orders.

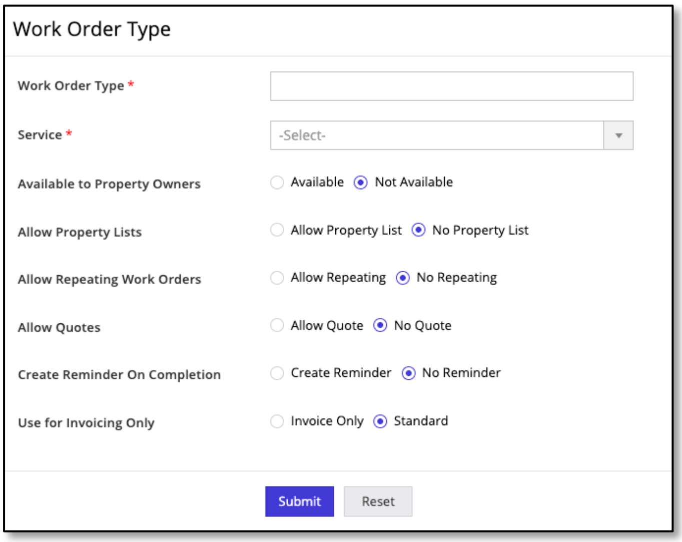
- When scheduling you only see the relevant team members for each job, based on the categories selected.
- Team members can belong to multiple categories, such as Maintenance, Equipment, or Cleaning.

6. 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.
- The flags on Work Order Types control features on work orders, such as the following:
    - Available to Property Owners – determines which work order types you make available to property owners to use when requesting a work order.
    - Allow Property Lists – determines if property lists are available with this work order type.
    - Allow Repeating Work Orders - determines if this work order type allows repeating work orders.
    - Allow Quotes – determines if a quote can be added to the work order.
    - Create Reminder On Completion – determines if admin users are prompted for a reminder when the work order is completed, useful for annual and semi-annual tasks.

   - Use for Invoicing Only – This is for admin only and is used to create an invoice entry, useful if the customer is billed ahead of work being delivered e.g. a fixed fee for snow removal at the start of the season.



7. Products / Services

These are used to reflect how you invoice your customers. These should align with your accounting system for easy integration.

The Product / Service field needs to match the Name field in QuickBooks. This is how we link what's in the app with what's on QuickBooks.

It could be the case that you use codes, in that case we have a description field which can be used to provide a friendly name on our system. Otherwise, this can be left empty.

The invoice method on Services can be set up as:

- Hourly / Subcontractor – this will use the schedule rows to determine the invoice amount for the work order.
   - For team members this will be hours worked X rate
   - For subcontractors this will be the contractor fee
- Fixed fee - this will use the service fee to determine the invoice amount. The amount can be a fixed fee per work order or per month.
- Product - this is used for Costs so that they can be invoiced against their own Product code.
- Not invoiced - this is useful for tracking work that doesn't require billing.

How products / services are used

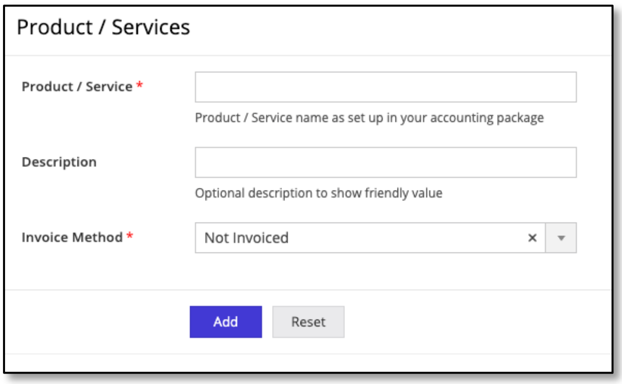
Each line item on an Invoice has a Product / Service assigned to it. These are associated with the Work Order Types and Costs in our system.

Work Order Types:

A Product / Service needs to be assigned to a Work Order Type.
This will determine how the work is to be invoiced to the customer. The service can be set to either Hourly / Subcontractor, Fixed Fee or Not Invoiced

Costs:

A Product / Service can also be assigned to a Cost, but only if you want to have a different Product / Service than the Work Order. If that's not needed, then it can be left empty. When populated, calculations will still be based off the Product / Service of the Work Order.



8. Rates

These are the sets of rates, that will be used against your team and your equipment.

- These rates are only visible to admin users and will be linked to individual team members.
- When a team member is scheduled, his rate will be defaulted on the schedule, from the rate stored with the Team Member. It is possible to change the rate for a particular work order when scheduling the team member.
- For example, you might set a Team Leader at $60.00 per hour and a Crew Member at $50.00 per hour.

9. Payment Terms

Payment Terms are added to invoices to describe when the invoice payment is due.

- Default terms of 'Due on Receipt' and '30 Days' are created by default.
- Admin users can add new payment terms and define which default payment term should be added to invoices.

10. Broadcasts

Create notifications that can be sent to your team or to your property owners.

- Broadcasts show a list of existing broadcasts that has been sent.
- To create a new broadcast, use the '+' icon.
- When creating a broadcast, you can choose to broadcast to Property Owners or your team.
- Properties - You can filter by billing category and then select which individual properties that you want to broadcast to.
- Team - You can filter by the role and then select which team members that you want to broadcast to.
- Enter the title and the message that you want to send.

11. Extracts

It is possible to create a data extract that is suitable for importing into other apps or to create some external reporting. Extracts are produced in csv format.

- Extracts show a list of currently created Extracts.
- Once created the extracts are emailed to the user that created the extract. It is possible to resend the extract if required.
- The following extracts are available:
    - All Work Orders
    - Completed Work Orders
    - Open Work Orders
    - Properties
    - Time Entered

12. Company Settings

This option displays company information that can be updated by admin users.

The billing tab is a link to the billing report.

The metrics tab is a link to a metrics page.

In order to automatically send invoices to QuickBooks, both the properties and products / services need to be linked with QuickBooks.

The Sync to Quickbooks provides two options:

- Properties / Customers - this allows properties set up in the app to be synchronized with customers from QuickBooks.

- Products / Services - this allows products / services in the app to be synchronised with items (products / services) in QuickBooks.