

## **Chintaro Maintenance Quick Start Guide**

The Chintaro Maintenance Quick Start Guide is a reference document for existing Chintaro Users that provides step by step instructions on getting started with Property Maintenance.

The Chintaro Maintenance Quick Start Guide is divided in to 5 sections, and covers:

1. Tradespeople
2. Inventory Items
3. Types of Maintenance
4. Raising a Maintenance Task (Work Order)
5. Action Section
6. Completing a Work Order

## Adding a Tradesperson

Tradespeople are the individuals or businesses that you will assign your Maintenance Tasks to.

To add a Tradesperson, from the Trades People Search Screen, click the **Add Tradesperson** button.

Enter the following General Information:

General	
Trading Name:	ACDC
Trade Type:	Electrical Contractors
Address:	34 Hell Hwy
(< ctrl> Enter for new line)	
City:	COLLINGWOOD
Postcode:	3066 <span>Copy to Postal</span>
Postal Address:	34 Hell Hwy
Postal City:	COLLINGWOOD
Postcode:	3066
Supplier ID:	AC12108642
Region:	East
ABN:	785 124 452 854
Contact 1 Name:	Bon Scott
Contact 1 Phones:	0414 362 436      03 9223 2021
Contact 1 Fax:	03 9223 2020 (Default Fax)
Contact 1 Email:	bon@acdcelec.com.au (Default Email)
Contact 2 Name:	Angus Young
Contact 2 Phones:	0458 698 722      03 9223 2021
Contact 2 Fax:	03 9223 2020
BSB/Acct Number:	063103      1002 8979
Payment Method:	EFT
BPay Biller Code:	
KPM Maint Type:	Agency Contracted
Template Name:	
Related Link:	
(< ctrl> K to add/edit link)	
Comments:	Preferred Electrician.
(< ctrl> Enter for new line)	

**Trading Name:** The Name of the Business.

**Trade Type:** The type of trade the business conducts.

**Supplier ID:** Is an external supplier ID used in accounting (payables) exports (if applicable).

**Region:** Is used to indicate if the Tradesperson has a preferred region to work in.

**Contact 1 Name:** The name of the main contact person.

**Contact 1 Email:** Is used as the default Email address when sending Maintenance Tasks via Email.

**Payment Method:** Is used to record the preferred payment method of the Tradesperson.

**Template Name:** Is used to link a specific Maintenance Task (Work Order) template for the Tradesperson, if they have their own format for Work Orders.

**NOTE:** All drop down lists in Chintaro are completely customisable for your Organisation, and are maintained through System Maintenance> Reference Tables.

Compliance							
Licence Type	Licence Number	Expiry Date	Active	Date Last Changed	Last Updated		
Builders Licence	BL-556789	30/06/2018	<input checked="" type="checkbox"/>	25/08/2016 9:12:41 AM	Anna		
Compliance	C-45732	1/12/2016	<input checked="" type="checkbox"/>	25/08/2016 9:13:14 AM	Anna		

The **Compliance** Section is used to record types of licences the Tradesperson holds. If the Compliance Details for the Tradesperson have expired, a red warning will appear on both the Tradesperson Record and the Maintenance Task screen (when a task is allocated) to warn you which details have expired.



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Property Name	MaintenanceType	Scheduled Dat	Status	Item Name	Location	Trading Name	SC Order Num	Order Number	Active
Bracken 569	Upgrade	16/11/2025		General	Kitchen	ACDC	12381685	MDB4640	<input type="checkbox"/>
Pretty Vacant	Site Inspection	1/07/2015	Standard	General	Throughout	ACDC		MDB3954	<input checked="" type="checkbox"/>
Rogan 115	Responsive	16/07/2015	Standard	General	Laundry	ACDC		MDB3991	<input type="checkbox"/>

The **Maintenance Tasks** Section will build up a record of the Maintenance Tasks allocated to the Tradesperson. Both Active (incomplete) and Inactive (completed) tasks will appear in this section.

Note Date	Note Type	Note Title	Last Updated I	Note Originat	Date Last Char	Date Entered
17/12/2015	Email		Anna	Anna	24/05/2016	17/12/2015

The **Notes** Section for a Tradesperson is a historical record of the interaction you have with the Tradesperson. Notes can be entered manually, and some Notes are created automatically by the system.

SMS
Email
Word Merge

The **SMS**, **Email** and **Word Merge** functions enable you to communicate with the Tradesperson directly from the Tradesperson Record.





## Inventory Items

Inventory Items are the items in a Property that you want to keep a record of, and assign Maintenance Tasks to. Some Organisation's record their Inventory Items in detail, by logging all major appliances and furniture items individually. Other Organisation's will record one Inventory Item called *General* and then link all maintenance in a Property to a general Inventory Item. All Properties in Chintaro must have at least one Inventory Item called *General* to assign Maintenance Tasks to.

To add an Inventory Item to a Property, from the Property Record, click **Inventory > Add Inventory Item**.

If you are entering Inventory Items individually, enter the following Information:

Item	
Item Name:	LG Fridge
Serial Number:	LG-1128512258
Item Location:	Kitchen
Item Type:	Fridge
Item Group:	White Goods
Trade Type:	Plumber & Gasfitting
Maintenance Type:	Responsive
Works Type:	Plumbing
Trades Person:	ACDC
Make:	LG
Model:	GC306NW
Capacity:	306 Litres
Supplier:	The Good Guys
Purchase Date:	23/07/2015
Purchase Price:	\$1,000.00
Replacement Date:	23/07/2015
Replacement Cost:	\$1,500.00
Warranty Expire:	23/07/2020

**Item Name:** Name of the Item.

**Item Type:** Is used to record what type of item it is (EG Fridge).

**Item Group:** Is used to record what group of appliances the item belongs to (EG Whitegoods).

**Trade Type:** Is used to indicate the type of tradesperson that will complete the maintenance on the item (EG Plumber and Gasfitter).

**Maintenance Type:** Is used to record the type of maintenance that the item will require. Usually, this will be Responsive (when something breaks, and you need to get it fixed).

**Trades Person:** Is used if there is a particular Trades Person or company that will be responsible for maintaining the Inventory Item.

**NOTE:** Most drop down lists are completely customisable for your Organisation, and are maintained through System Maintenance > Reference Tables.

If you set the default Inventory Item to General (in System Preferences), there is no need to create them against the Properties. The system will create it the first time you raise a Maintenance Task on the Property.





## Types of Maintenance

There are 3 main types of Maintenance in Chintaro.

1. **Responsive Maintenance:** Responsive Maintenance is where an item in a Property is broken and needs to be fixed. A Maintenance Task will be created and sent to a Tradesperson, and the Tradesperson will attend the Property to fix the item. Responsive Maintenance is the most common type of Property Maintenance.
2. **Cyclical Maintenance:** Cyclical (or Scheduled) Maintenance is where you can set up Maintenance to occur on a regular basis, such as every 3 months, 6 months, 12 months, etc. Items that require Cyclical Maintenance include Smoke Alarms, Gutter Cleaning, etc.
3. **Forecast Maintenance:** Forecast (or Planned) Maintenance is used to budget for the types of works that your Organisation will conduct on your Properties to maintain their asset value. This allows you to prepare a long-term budget for the upgrades you have scheduled over many years.

Maintenance Types will appear on the Home Screen, in the Control Panel:

Incomplete Maintenance Tasks	Overdue Maintenance	Forecast Tasks Due 30 days
*No Maintenance Type (1) Builders Liability (2) Cyclical (1) Nation Building (1) Out of Hours (1) Responsive (9) Site Inspection (1,591) Upgrade (2) Vacated Maintenance (1)	Nation Building (1) Responsive (5) Site Inspection (1) Upgrade (1)	Upgrade (3)





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## Raising a Maintenance Task (Work Order)

Once you have entered a Tradesperson to perform the Maintenance, and added at least one general Inventory Item to a Property, you will want to create a Maintenance Task (Work Order) to request the Tradesperson to complete the necessary Maintenance required.

You are able to create a new Maintenance Task by clicking the **Add Maintenance Task** quick link in the Toolbar.

This will open an empty Maintenance Task where most of the fields will be greyed out.

First, select the Property that requires the Maintenance from the Property field. Once you have selected a Property, other fields will become Active.

<b>Property Details</b>	Summer 10
<b>Inventory Item:</b>	General
<b>Maintenance Type:</b>	Responsive
<b>Location:</b>	Bathroom
<b>Room:</b>	
<b>Item Type:</b>	Tap Handle/button
<b>Item Group:</b>	Taps
<b>Works Type:</b>	Plumbing
<b>Trade Type:</b>	Plumber & Gasfitting
<b>Tradesperson Details</b>	Men At Work
(Email)	colin@menatwork.com.au
<b>Email CC:</b>	anna@chintaro.com.au
<b>Urgent?:</b>	Priority
<b>Created By:</b>	Anna
<b>Housing Worker:</b>	Anna
<b>Tenants Permission?:</b>	<input type="checkbox"/> <b>Tenant Damage?:</b> <input type="checkbox"/>
<b>Damage Type:</b>	
<b>Tenant Charged?:</b>	<input type="checkbox"/> <b>Tenant Invoice:</b> <input type="text"/>
<b>Copy Tenant Details</b>	
<b>Tenants Name(s):</b>	Terry Woods
<b>Tenants Phone(s):</b>	0458698720
<b>Tenant Availability:</b>	Available after 1:00pm weekdays

**Inventory Item:** Is used to indicate the Item that requires the Maintenance. If your Organisation does not have detailed records of each item in the Property, select *General* from the drop down list.

**Maintenance Type:** Is used to record the type of maintenance that the item requires. Usually, this will be Responsive (when something is broken and you need to get it fixed). If you are requesting scheduled maintenance such as Smoke Alarm Checks, select Cyclical from the drop down list.

**Tradesperson Details:** Select the Tradesperson that you will assign the Maintenance Task to from the drop down list. When selecting a Tradesperson, the Email field will default to the Email address entered on the Tradesperson Record.

**Email CC:** Is used if you select to Email the Maintenance Task to the Tradesperson. Enter an Email address of a person that you would like to CC'd in the Emailed Work Order.

**Urgent:** The Urgency drop down list is used to indicate the urgency of the maintenance required. This field is linked to the Scheduled Completion Date in the **Completion Details** function. In Chintaro, the default Urgency Categories are Urgent (1 day to resolve), Priority (7 days to resolve) and Standard (30 days to resolve). The Urgency Categories and number of days resolution can be changed through **System Maintenance > Reference Tables > Urgent Types**.

**Created By:** Will default to the username you are logged in to the system with, but can be overwritten if required.





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**Property Manager:** Will default to the Property Manager's name (if entered on the Property Record), but can be overwritten if required.

**Tenants Name(s) & Tenants Phone(s):** Are used to indicate the person who will be contacted for the Maintenance Task. To remove the Tenant Name and Phone Number(s), highlight the field and press <DELETE>. To add other Tenants to contact, click Copy Tenant Details. You are able to type straight in to the 'Tenant Details' fields (Tenant Name(s), Tenants Phone(s), Tenant Availability) if you would like to enter a different contact name, such as a staff member's name.

**Instructions** (<ctrl> Enter for new line)

Please fix the following 2 leaking taps in the bathroom:

1. Basin
2. Bath

**Instructions: Very important field,** where you enter the details that will tell the Tradesperson what the issue(s) is. You can make this as detailed as you would like.

**Access Instructions:** Is used to add any specific instructions related to accessing the Property.

**Access Instructions**

Enter via the side door.

**Tradesperson Alerts/Instructions:** Is used to enter any information that you need to alert the Tradesperson to, about the Tenant or the Property. The Property Alerts and Client Alerts displayed on the Maintenance Task screen will not automatically be shown on the Work Order, as there may be sensitive information in these alerts that is not relevant to the Maintenance Task itself. If you are required to alert the Tradesperson to potential dangers, enter the alerts/instruction information in this field.

**Date fields:** Will default to today's date. The **Reported Date** is the date you were advised the item requires maintenance, the **Scheduled Start Date** is the date you believe the maintenance will begin, and the **Actual Start Date** is entered when the maintenance begins on the item.

**Order Number:** Is your Organisation's reference number for the Maintenance Task. The numbering system for your Maintenance Tasks can be modified by adding/removing prefixes and selecting a number to begin with in **System Maintenance> Preferences> Maintenance> Work Order Prefix Number**.

**Costs:** You can enter the **Estimated Cost** and the **Budget Cost** of the maintenance required, by clicking the **Completion Details** button at the top of the screen, and entering the appropriate values.





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## Action

<b>Action</b>	
<b>Send Work Order To...</b>	<input type="checkbox"/> New Word Doc <input checked="" type="checkbox"/> Email <input type="checkbox"/> Printer
Quotation?: <input type="checkbox"/>	
Status: <input type="text" value="Created"/>	Active Task?: <input checked="" type="checkbox"/>
Template: <input type="text" value="TradeEmail.dot"/>	

The Action Section (at the bottom left of the screen) is where you select the option you require to:

1. Send the Work Order to a New Word Document, where the Work Order will open in Microsoft Word allowing you to view and edit the document before saving or printing, or
2. Email the Work Order directly to the Tradesperson's default Email address listed, or
3. Send the Work Order straight to the Printer.

Select the Action to take from one of the 3 tick boxes, and then click **Send Work Order To**.

The Maintenance Task has a number of **Additional Data and Functions** at the top of the screen:

SMS Tradesperson	SMS Tenant	Forecast Task	Task Details	Completion Details	Add New Task	Update	EXIT
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**SMS Tradesperson:** Is used to send an SMS to the Tradesperson.

**SMS Tenant:** Is used to SMS the Tenant of the Property that requires Maintenance.

**Task Details:** Is used to see the default view of the screen.

**Completion Details:** Is used to enter the completion details of the Maintenance Task.

**Add New Task:** Is used to add a new Maintenance Task to the system.

**Update:** Can be used if you are entering information in to a Maintenance Task, and you want to save the changes you have made as you go.



## Completing a Work Order

When you have confirmation that the Tradesperson has completed the work requested, you can enter the completion details in the Work Order.

Click the **Completion Details** function.

Work Completion Details	
Scheduled Completion:	08/12/2015
Actual Completion:	
Invoice Paid:	
Tenant's Confirmation:	
Work Completed	(< ctrl> Enter for new line)
Time Spent (Mins):	0
GL Batch No:	
Invoice #:	
Completed Satisfactorily?:	<input type="checkbox"/>
Confirmed for Payment?:	<input type="checkbox"/>

**Actual Completion:** Enter the date the Maintenance Task was actually completed by the Tradesperson. When a date is entered in to the Actual Completion field and you click elsewhere on the screen, the **Active Task?:**  box in the Action section will automatically untick, indicating that the Maintenance Task has been completed.

**Invoice Paid:** Enter the date the invoice from the Tradesperson was paid for the Maintenance requested.

**Tenants Confirmation:** Enter the date the Tenant confirmed the work was completed by the Tradesperson.

**Works Completed:** Enter the details from the Tradesperson regarding the work that was completed. This is usually reported back to you from the tradesperson. Entering information in this field will record the works completed as a historical reference.

**Time Spent (Mins):** Is used if you have an internal Tradesperson completing the Maintenance Tasks and you want to record how much time was spent completing the requested task. If you had an external Tradesperson completing the Maintenance, leave this field blank.

**GL Batch No:** Is used to code the Work Order to a particular General Ledger account which forms part of an extract to Accounts Payable modules.

**Invoice #:** Enter the invoice number provided by the Tradesperson.

**Completed Satisfactorily?** Tick the Completed Satisfactorily box to indicate if the work was completed to your Organisation's satisfaction.

Costs	
Estimated Cost:	\$180.00
Budget Cost:	\$180.00
Actual Cost:	\$0.00
Estimated GST:	\$16.36
Budget GST:	\$16.36
Actual GST:	\$0.00

**Actual Cost:** Enter the Actual cost (including GST) of repairing the item once the work has been completed by the Tradesperson.

**Property Transaction from the Maintenance Task:** Is used to create a transaction in the Property Ledger regarding the costs entered for the Maintenance Task. Click **Create Property Txn** to create a Property Transaction.

**Create Property Txn**  
Txn Type:

**Property Note from the Maintenance Task:** Is used to create a Property Note from the Maintenance Task. Click **Create Property Note** to create a note on the Property Record.

**Create Property Note**  
Note Type:

