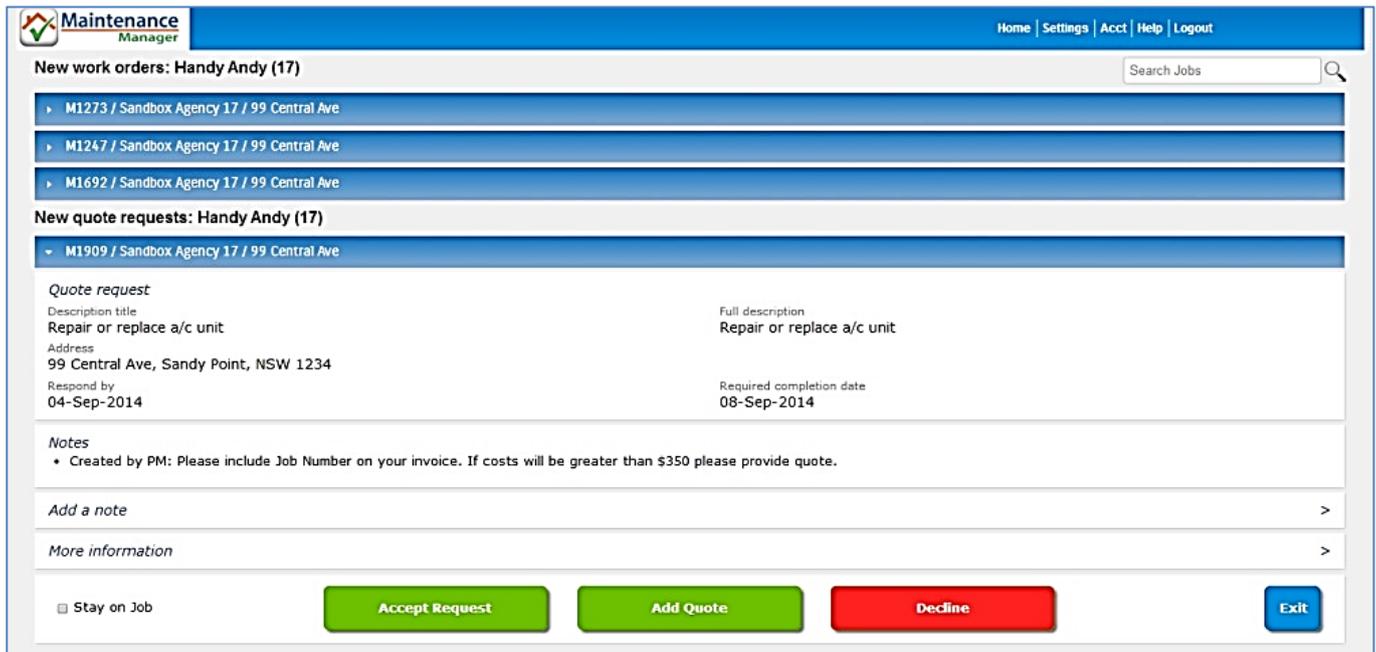# Supplier Guide – Conditional Work Orders

What is a Conditional Order

A Conditional Order, also known as a Capped Order, is an order subject to a cost limit – combining a Quote and Work Order in one. If you enter a Quote amount that is within the cost limit the Work Order is immediately activated and you are authorised to proceed. If you quote above the cost limit it is submitted to the agency for approval like a normal quote. Conditional Orders are single supplier only and you will be the only supplier responding.

What do Conditional Orders look like

Conditional Orders are issued as a Quote request and appear under **New quote requests**. You can process them like a normal quote except for the potential for immediate authorisation if you quote below the cap.

Why are Conditional Orders used

Maintenance Manager is a property maintenance system that protects all parties by ensuring every step is documented and nothing can 'fall through the cracks'. Traditional trust accounting systems used by agencies are based on free-form emails and verbal approvals or changes to jobs. Maintenance Manager has processes to follow so if you receive a standard Work Order but the cost will exceed expectations you cannot then submit a quote. A Conditional Order resolves this and speeds up workflow between you and the agency when conditions such as cost limits are in place by allowing you to submit a quote for approval. If your quote is within the limit you get immediate authorisation.

When is a Conditional Order used

A Conditional Order is used when the Property Manager needs to be aware before incurring costs above policy limits or Landlord authorisation. If, for example, an agency has a policy that any job above $300 must be quoted, they can set a $300 limit on their orders. Likewise, if a Landlord says "go ahead provided it costs less than $200, otherwise I want a quote for replacement", the Property Manager can set a pre-authorised cost limit of $200.

Can you charge for the quote

You can charge for the quote if you have set this option in your Maintenance Manager Settings. Refer to the Processing section below.

Supplier Guide – Conditional Work Orders

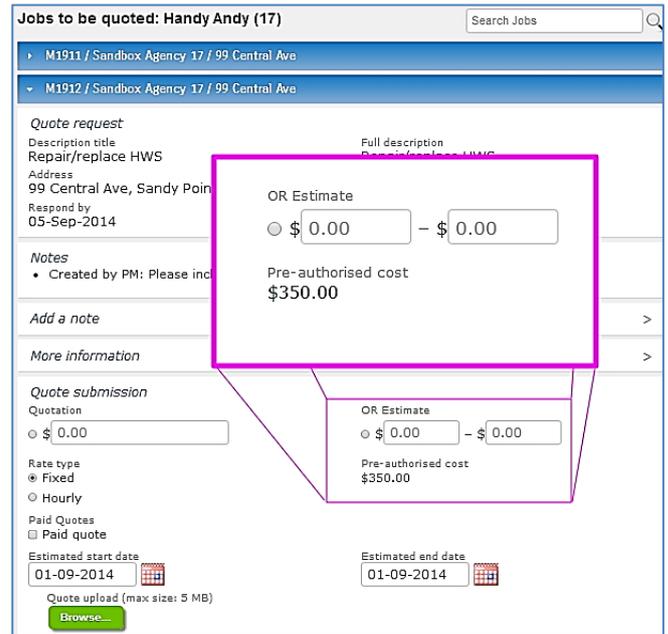## Where is the cost limit displayed

Display is at the discretion of the agency. If selected by the agency, the **Pre-authorised cost** is shown on the Quote request form as shown at right. Note: Some agencies add text to their Job Sheets however this does not necessarily mean they have issued the job as a Conditional Order.

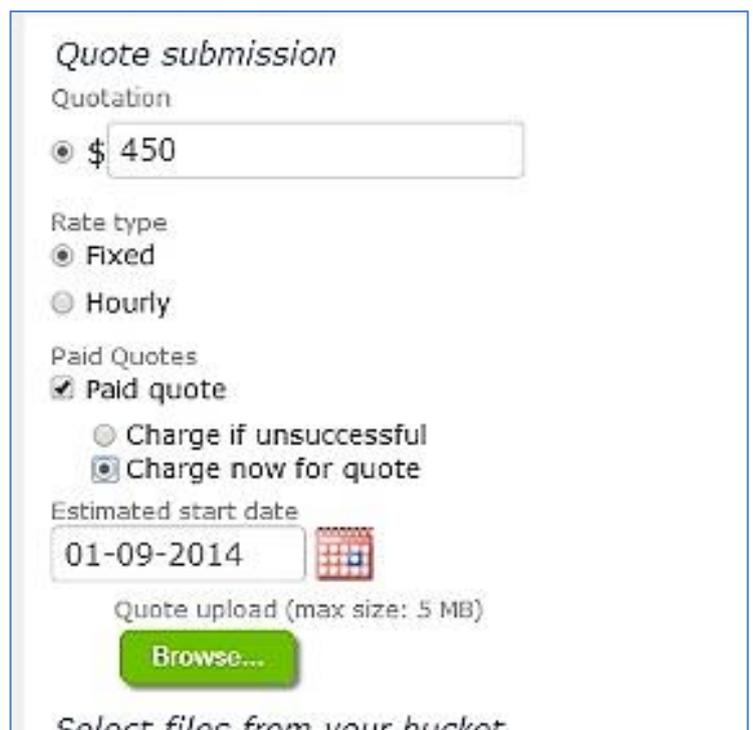## What are the quoting requirements

The quoting requirements are the same as any quote. Enter an amount, fixed or hourly, or a Low-High range. Attach a quote document if you wish. If the cost limit is displayed and you are certain your cost will be under this amount you may enter a quote without a site visit provided you accept that the agency may dispute or refuse payment if your invoice is greater than the quote.

Processing a Conditional Order

1. Click to open the job in "New quote requests".
2. You have two options:
   o Click **Accept Request** to advise the agency you have seen their request and will attend to it in due course. When you are ready to submit a cost you can re-open the quote from **To be quoted;** or
   o Click **Add Quote** to proceed directly to the quote screen.
3. In the Quote screen you may see the Pre-authorised cost amount (above) if the agency has selected this option.
4. Enter your quote amount and optionally upload a quote document.
5. If you wish to charge for this quote and have this option selected in your Settings, tick **Paid Quote** then:
   o Select either Charge if unsuccessful or Charge now for quote (see below), or
   o You can elect not to charge for this quote even if you have the option set on in your Settings.
6. Select **Submit Quote**.
7. If your quote is not greater than the Pre-authorised cost limit:
   o A popup screen will advise that you can now proceed with the job,
   o Go to **To be scheduled,** open the job from **Jobs for scheduling** and proceed as normal.
8. If your quote is greater than the Pre-authorised cost limit:
   o The quote will be submitted to the agency for approval, and
   o The job will be in **To be scheduled** under **Quotes waiting for Agency Approval** pending agency approval.
9. If you charge for quotes and selected Charge now you can proceed with the invoicing process.