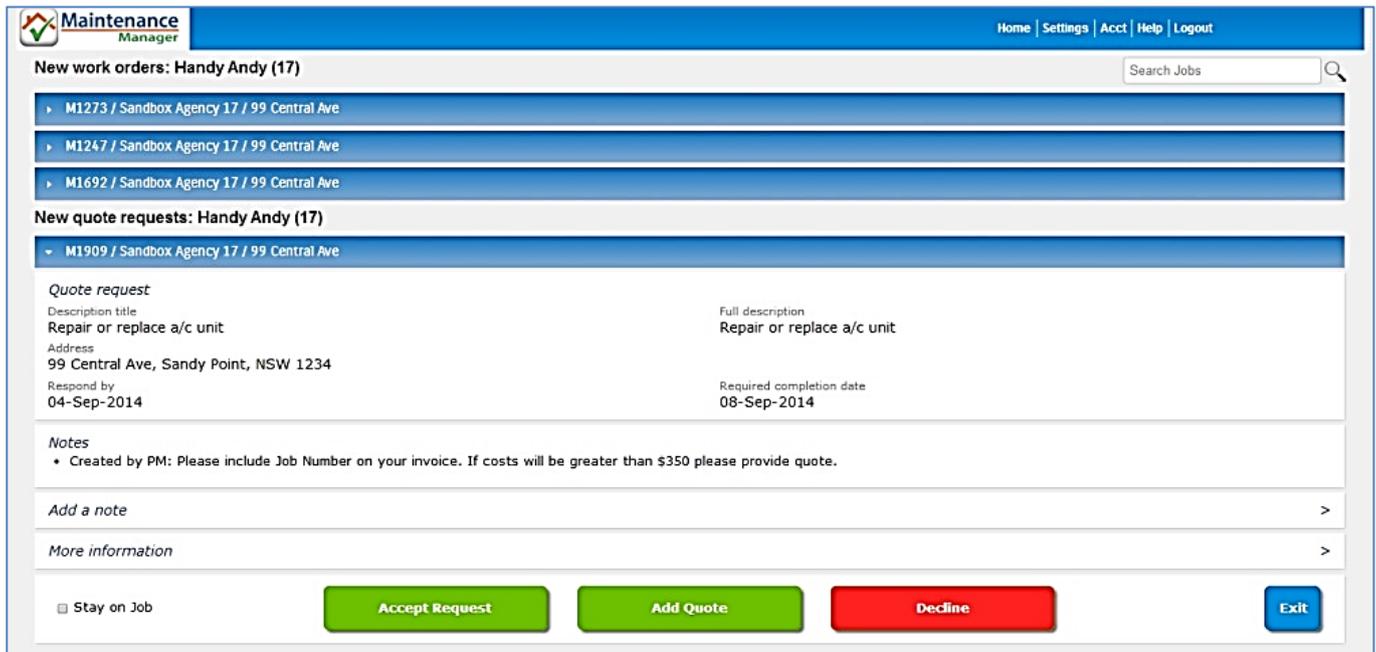


What is a Conditional Order

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.



The screenshot shows the Maintenance Manager interface. At the top, there is a navigation bar with 'Home | Settings | Acct | Help | Logout'. Below this, there is a section for 'New work orders: Handy Andy (17)' with a search box. Underneath, there are three expandable items: 'M1273 / Sandbox Agency 17 / 99 Central Ave', 'M1247 / Sandbox Agency 17 / 99 Central Ave', and 'M1692 / Sandbox Agency 17 / 99 Central Ave'. Below these is a section for 'New quote requests: Handy Andy (17)' with one expandable item: 'M1909 / Sandbox Agency 17 / 99 Central Ave'. This item is expanded to show a 'Quote request' with the following details:

Description title	Full description
Repair or replace a/c unit	Repair or replace a/c unit
Address	
99 Central Ave, Sandy Point, NSW 1234	
Respond by	Required completion date
04-Sep-2014	08-Sep-2014

Below the details is a 'Notes' section with a note: 'Created by PM: Please include Job Number on your invoice. If costs will be greater than \$350 please provide quote.' There are also links for 'Add a note' and 'More information'. At the bottom, there is a 'Stay on Job' checkbox and four buttons: 'Accept Request' (green), 'Add Quote' (green), 'Decline' (red), and 'Exit' (blue).

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.

Where is the cost limit displayed

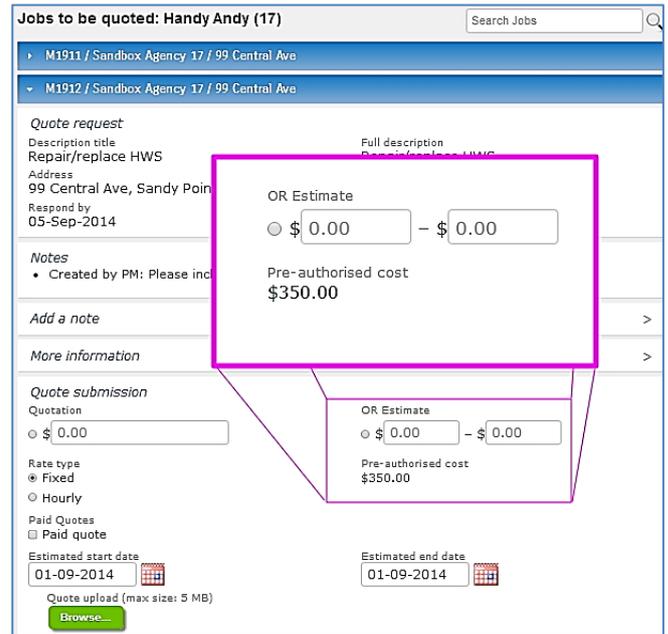
Display is at the discretion of the agency. If selected by the agency, the **Pre-authorized cost** is shown on the Quote request form as shown at right. Note: Some agencies add text to their Job Sheets however this does not necessarily mean they have issued the job as a Conditional Order.

What are the quoting requirements

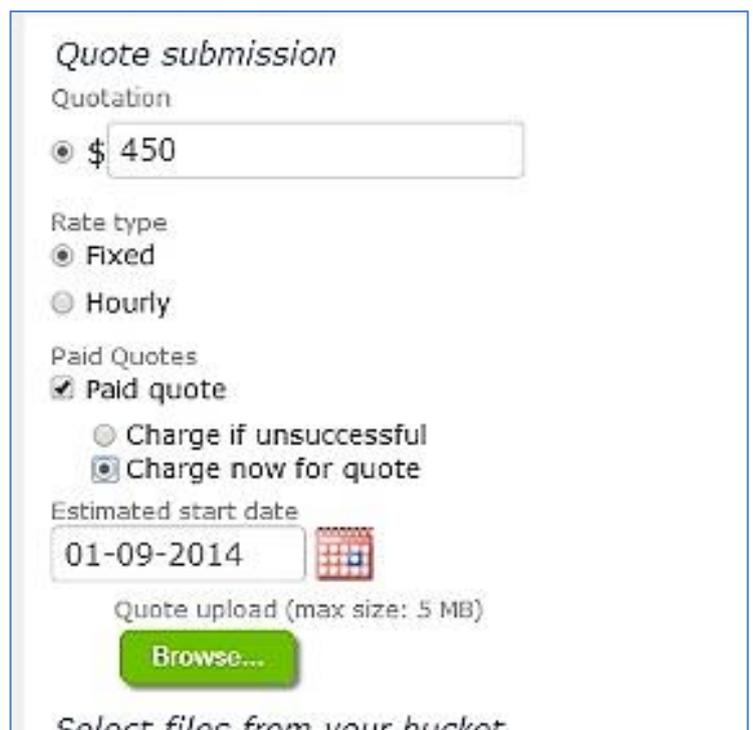
The quoting requirements are the same as any quote. Enter an amount, fixed or hourly, or a Low-High range. Attach a quote document if you wish. If the cost limit is displayed and you are certain your cost will be under this amount you may enter a quote without a site visit provided you accept that the 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:
 - 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
 - Click **Add Quote** to proceed directly to the quote screen.
3. In the Quote screen you may see the Pre-authorized 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:
 - Select either Charge if unsuccessful or Charge now for quote (see below), or
 - 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-authorized cost limit:
 - A popup screen will advise that you can now proceed with the job,
 - 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-authorized cost limit:
 - The quote will be submitted to the agency for approval, and
 - 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.



The screenshot shows a web interface for 'Jobs to be quoted: Handy Andy (17)'. It lists two jobs: M1911 and M1912. The selected job M1912 has a 'Quote request' form. The form includes fields for 'OR Estimate' (set to \$0.00 - \$0.00) and 'Pre-authorized cost' (set to \$350.00). A pink box highlights the 'Pre-authorized cost' field. Below the main form, there is a 'Quote submission' section with a 'Quotation' field (set to \$0.00), 'Rate type' (Fixed selected), 'Paid Quotes' (Paid quote selected), and 'Estimated start date' (01-09-2014). A 'Quote upload' button is also visible.



The screenshot shows the 'Quote submission' form. The 'Quotation' field is set to \$450. The 'Rate type' is set to 'Fixed'. The 'Paid Quotes' section has 'Paid quote' selected, with 'Charge now for quote' also selected. The 'Estimated start date' is 01-09-2014. A 'Quote upload' button is visible at the bottom.