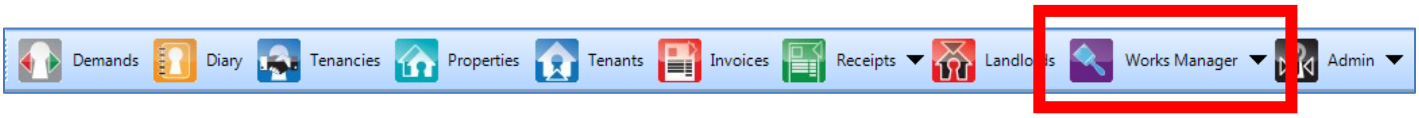
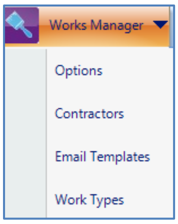
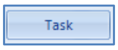
Works Manager

Introduction



The Works Manager Module is used for managing calls and logging tasks related to Properties, Tenants and Tenancies in KEYPrime Property. Tasks can be assigned to Contractors or assignees using diary actions and emails. Documents relating to tasks can also be linked / copied into the system.



Clicking the Works Manager button will open a dropdown menu for setting up Contractors, Email Templates and Work Types. There is also a 

button on the main Diary, Property, Tenant and Tenancies listing screens for creating Works Manager Tasks.

Documents can be copied or linked to tasks, by default they are copied to C:\ProgramData\Landmark\Key Prime\LandmarkDocuments. If you are a network user then this path will need to be configured by Landmark before the documents feature is used.

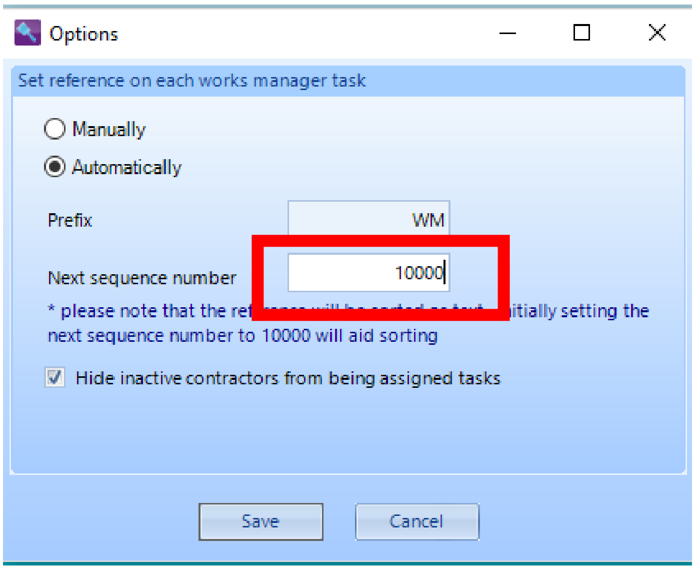
Setting up Works Manager

Before creating and managing tasks can be done, Contractors, Email Templates and Work Types must be set up in the following order.

1. Options
2. Contractors
3. Email Templates
4. Work Types
5. Entering Tasks

Options

Auto numbering of Work Manager Tasks can be set up here including a prefix. In this example WM is the prefix and we strongly suggest that a numbering sequence starting with 10,000 is used to avoid sorting issues. This will avoid listing screens showing items as follows:



WM1, WM10, WM11, WM2, WM3, WM4, WM5, WM6, WM7, WM8, WM9

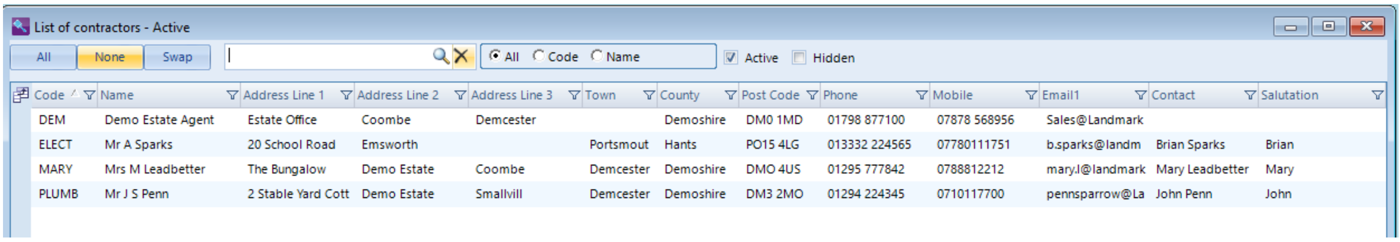
Using 10,000 as a start number the sequence will show as.

WM10001, WM10002, WM10003, and so on until WM10010, WM10011

If manual is selected then you will be prompted to enter your own unique number.

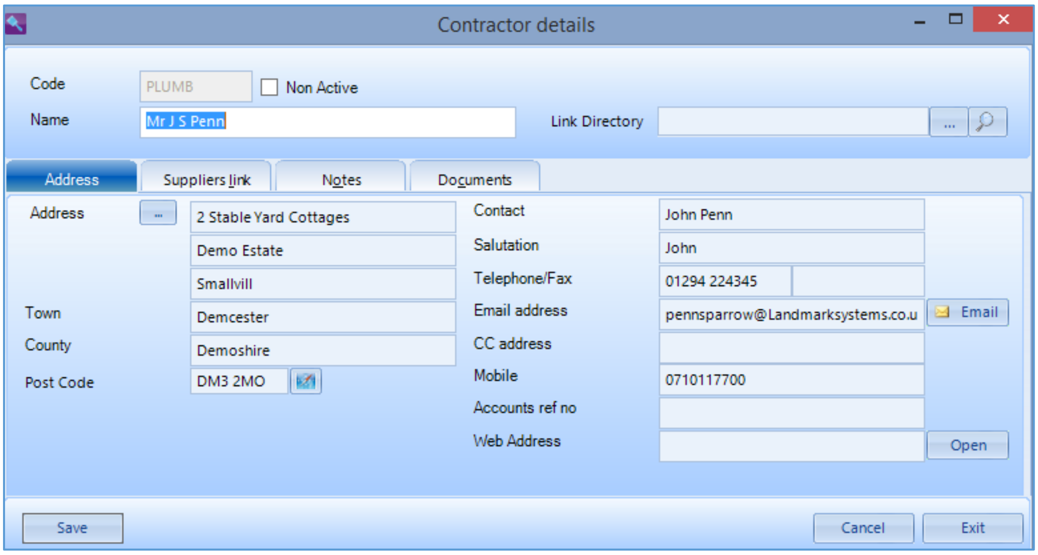
Contractors

Click on contractors from the Works Manager dropdown, here is where the contractors Name, Address and contact information is managed.



Code	Name	Address Line 1	Address Line 2	Address Line 3	Town	County	Post Code	Phone	Mobile	Email1	Contact	Salutation
DEM	Demo Estate Agent	Estate Office	Coombe	Demcester		Demoshire	DM0 1MD	01798 877100	07878 568956	Sales@Landmark		
ELECT	Mr A Sparks	20 School Road	Emsworth		Portsmout	Hants	PO15 4LG	013332 224565	07780111751	b.sparks@landm	Brian Sparks	Brian
MARY	Mrs M Leadbetter	The Bungalow	Demo Estate	Coombe	Demcester	Demoshire	DMO 4US	01295 777842	0788812212	mary.l@landmark	Mary Leadbetter	Mary
PLUMB	Mr J S Penn	2 Stable Yard Cott	Demo Estate	Smallvill	Demcester	Demoshire	DM3 2MO	01294 224345	0710117700	pennsparrow@La	John Penn	John

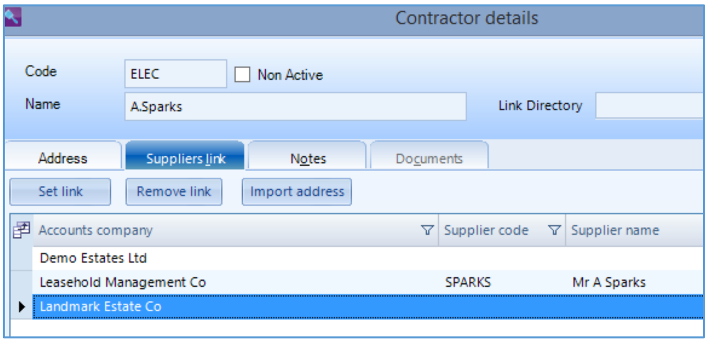
Click on the **Add** button to bring up the new contractors form:



Enter a short code for the Contractor and the name and contact details. If the Contractor's name and address is already on the system because they are a trader in the accounts, having typed in the code the remainder of their details can be imported by clicking on the **Suppliers link** tab.

Highlight one of the Landlords and click on the Set Link button. This will list all the traders in the accounts. Highlight the trader to be used and OK. Click on the Import Address to copy in details of the address from the accounts. This will import all the trader details that are in the accounts including their telephone number and email address etc.

The code for the Contractor does not have to be the same as the Trader code in the accounts. In this example the contractor code is ELEC and it is being linked to supplier code SPARKS in the accounts.



Contractors do not link with Traders in the accounts as one contractor may serve many sets of accounts and so they have been kept independent of each other. We reserve the right to change this in the future. To save the record press Save at the bottom left.

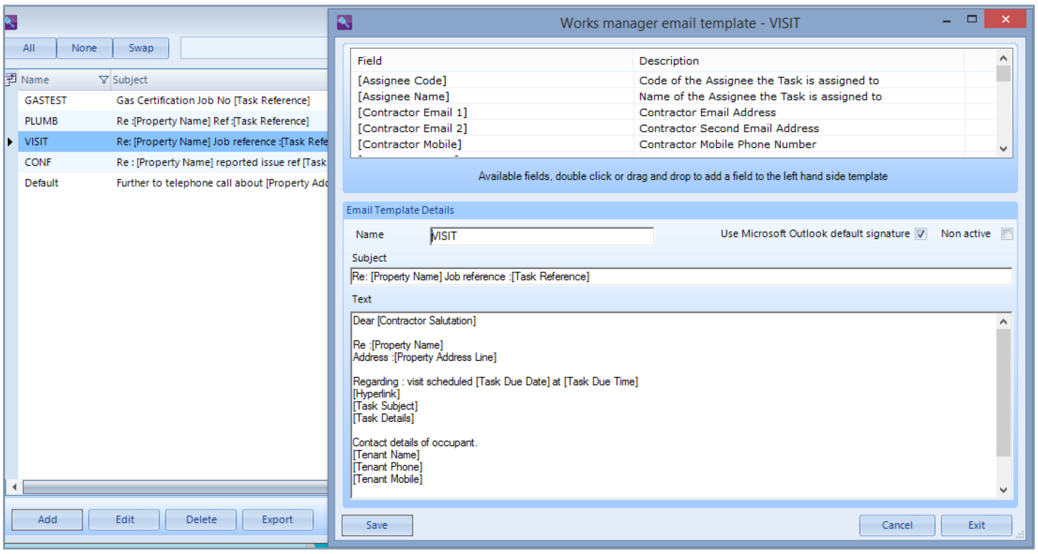
To edit an existing Contractor double click on the record or tick the edit button. Contractors can be deleted only if they have not been used on any tasks. Highlight the contractor and click on the delete button; if the contractor has been used you will be told and the delete will be abandoned.

It is important to ensure that the Contractor codes are kept unique. Contractor records cannot be merged.

Email Templates

When creating a new Task type it is possible to allocate it a default Email layout so that all emails sent from that task have the correct information. The Email templates can include information imported from the record.

To manage Email templates select **Email Template** from the Works Manager Menu option and either click on Add or edit an existing template to bring up the Email Template editor**.**



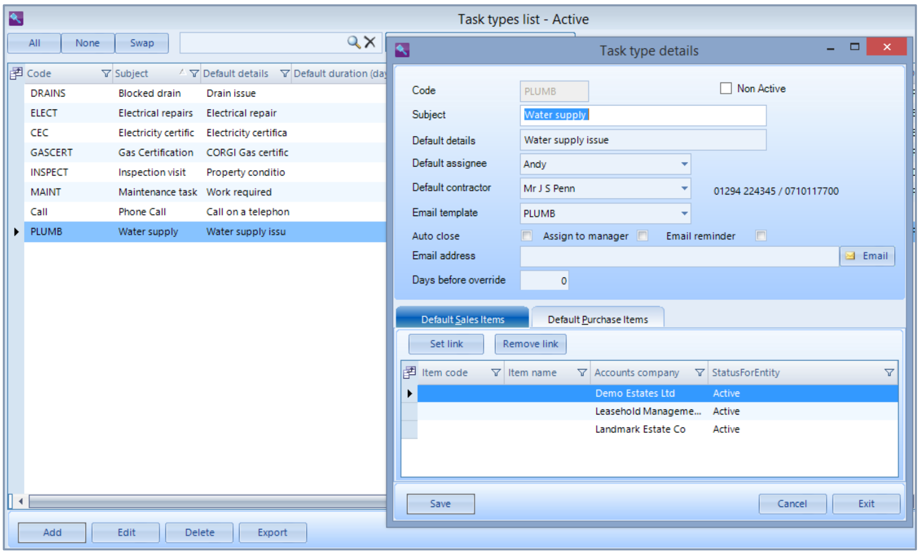
This form is split into two halves; the top half shows a list of fields that can be added to the email template to display the information specified in the field.

The bottom half is used to compose a customized email message that will include some of the fields from above. The email body can be any length required although we recommend brevity.

Enter a relevant code for the template. The subject and the body of the email can use template fields as appropriate. To include a field at the point in the text you are editing either double click on it or drag and drop it where needed.

If you tick **Use Microsoft Outlook default signature** this includes your standard Outlook signature on the email. Otherwise you will need to add the appropriate signature in the body of the email when sending. Once you are happy with the format click Save.

Task Types



Task types can be used to categorise the types of calls and tasks that you wish to record, for example if you wish to report on Regular tasks and Emergency call outs separately it is helpful to create a task for each.

Each task can have a default Assignee, Contractor and Email template associated with it. It therefore makes sense to have a separate Task type for, e.g. Gas Tests and Electrical Tests. However it is entirely your choice as to how many and what Types of tasks you record. Forward planning on who is going to be responsible for each task and what types of reports you are going to need can save a lot of time later.

Code	Up to 10 characters can be used.
Subject	A short description of the task type for reporting purposes.
Default Details	Is the standard text that you wish to enter whenever creating this type of task?
Default Assignee	Who is responsible for managing these types of task? Can be left blank if it is more than one person.
Default Contractor	Who is responsible for carrying out the task? Again can be left blank if this type of task is carried out by more than one contractor regularly.
Email Template	Link to the email template that best serves the Task type.
Auto Close	There are two fundamental Task Types:- i) Those used for recording things that have happened and need no further action, i.e. for recording calls and emails in to the office. These can be set to Auto Close on creation. ii) Those which are added to the diary for further action so are not set to Auto close.

In either case when creating tasks you may overrule the open/closed status.

Assign to Manager Allows the Property Manager setting to override the default Assignee setting.

Email Reminder Whether the Task sends out email reminders when it is coming due.

Email Address A free typing email address of a recipient of the reminder who is neither the creator, assignee, contractor, tenant nor landlord associated with the task.

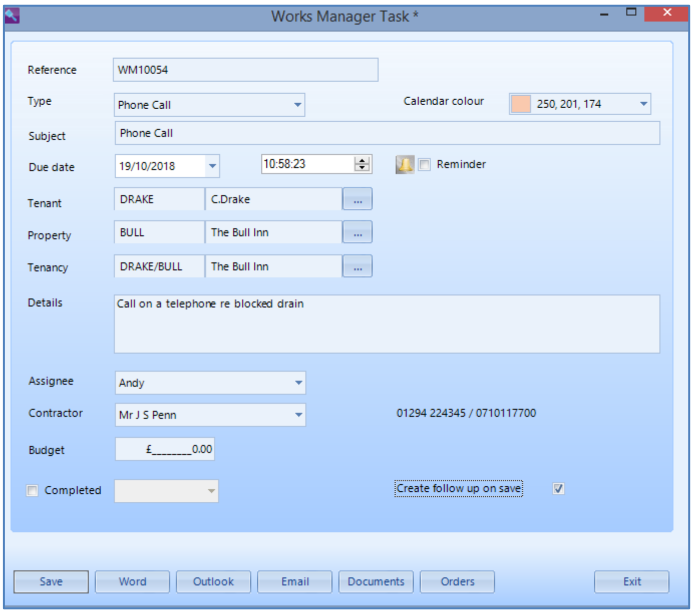
Days before override A setting to specifically override the standard number of days' notice usually entered on the Task.

A further optional module is Order Processing linked to Works Manager. If this has been purchased then Sales and Purchase orders can be linked to Tasks. To help speed entry of these orders it is possible to link the different task types to Items in the accounts.

Select a Landlord and click on Set Link. This will display a list of all Items available in that Landlord. Highlight one and click on OK.

Entering Tasks

Individual Tasks can be entered from the Tenant, Property, Tenancy or Diary listing screens or from within the Diary tab in Tenants, Properties or Tenancies.



Having selected the record click on the Task button and a new Task form will be displayed. This will automatically include all the Tenancy details including the Property, Tenant and Tenancy code. Where there is more than one tenancy for the Tenant the best match to the current Tenancy will be used. The details can be removed or edited if necessary.

When creating more general Tasks from the Diary listing screen it is not necessary to select a record first as the Tenant, Property and Tenancy details all appear blank and can be left that way. It would not be possible to send an email or word letter on these tasks until there is at least one record with address details saved on the task.

Reference The reference for each Task which will be filled in if the Automatic option has been chosen. You may wish to keep a unique reference for all work tasks or you may group tasks together by using the same reference number. The task reference is automatically copied onto any follow up task created from it.

Type The Type selected will determine the behaviour and content of the task according to the defaults set.

Colour Tasks may have a colour set for the diary to distinguish them from each other.

Subject A brief description of the purpose of the task as defined in the Task Type, this can be overtyped.

Due Date Time The date and time that the task should be completed; this defaults to today but can be any date in the future or past. Select time as 24 hour clock using the arrows or by overtyping the hours/mins/seconds if required.

Reminder Tick Reminder and use the dropdown arrow to select when to get an on screen reminder that the task is due, while KEYPrime Property is open.

Tenant The tenant that you wish to associate with the task. This will automatically populate if you have selected the Tenant, their Tenancy or Property when creating the task.

Property As for the Tenant this is the Property code associated with the task.

Tenancy As for Tenant and Property; this does not need to be completed.

Details The default details of the Task will show as defined in Task Types. They can be changed to suit. If another task needs to be entered with the same details then click on the clipboard  or press Ctrl D to automatically bring through the details from the previous task.

Assignee Select an assignee using the drop down arrow if not already set or you wish to change from the default.

Contractor Choose the contractor for the task from the list.

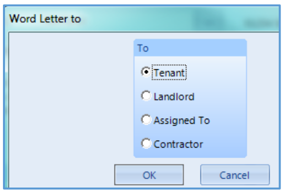
Budget Enter an amount if required for budgeting purposes. This will show on the Works manager Tasks report.

Completed This will automatically be ticked if Auto close was set on the Task Type. The completed date is set to today. These can both be changed before saving if needed.

Create Follow up on save With this ticked, when the task is saved, a follow up task is created using the details of the original task. These details will be displayed for editing and confirming.

Word

To create a Word letter based on the task, press the Word button then select to whom the letter is being sent. Click OK to show a list of available templates. There is a WorksManagerLet-Master fields.doc that has all the default fields defined in it along with instructions. Also there is a WorksManagerLet-SampleLetter.doc as a sample letter.

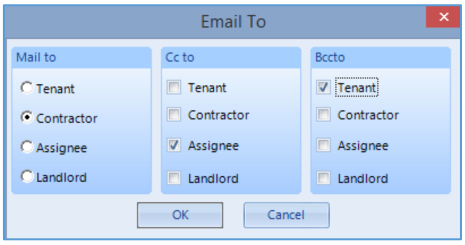


Outlook

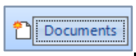
Click on the Outlook button to put the Task onto an Outlook calendar. This is also available when a Follow Up task is created after saving the original.

Email

To create an **email** based on the task click on the email button.



Documents

Relevant documents, e.g. emails, can be dragged onto the task for linking/copying. Once they have been dropped the button will show and flash 

. See "**Error! Reference source not found.**" on page **Error! Bookmark not defined.** for more information.

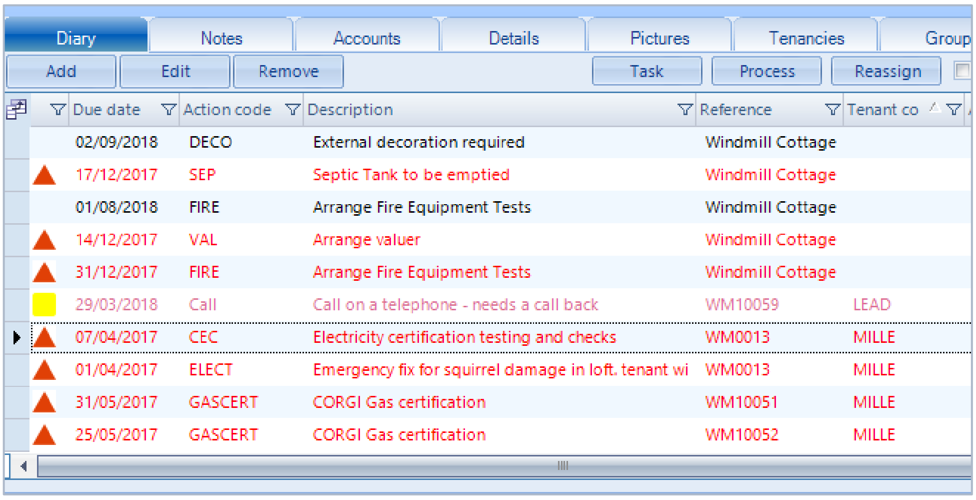
Orders

Where the Works Manager SOP/POP is enabled click on the Orders button to open the screen listing all Orders Linked To Works Manager. A task can be linked to an existing order or a new order can be created. If a new order is opened it will contain the default Contractor and Item code as set in the Task Type. Once saved the order will appear in the Accounts SOP/POP section where it can be receipted or dispatched and linked to invoices. See the SOP/POP section of the Accounts manual.

Tasks in Diary Tab

Tasks appear in a similar fashion to diary actions in both the Diary listing screen and the Diary tabs in Tenants, Properties and Tenancies. Within the lists the Tasks can be easily identified by the Action codes and by the reference.

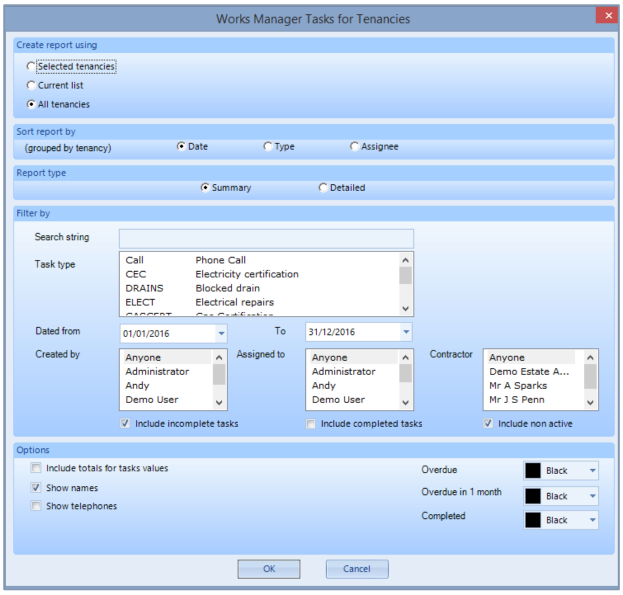
Also there will be the extra Tenancy information available if the fields have been added to the screen. Diary actions do not have this extra information.



Works Manager Task Report

The Diary/Property/Tenant and Tenancies listing screens have a report called Tasks. The report can be sorted by date or type and can be shown in summary or detailed.

There are many filter options that can be chosen, e.g. you can filter by landlord or enter a search string. Work types, task dates, created by, assigned to and contractor can be selected. Whether to include uncompleted /completed tasks.



Further options to include totals for task values, whether to show names/telephone numbers and colours for tasks.