Leopard 42 input on Maintain 101

# REQUEST FOR SERVICE

* The following services are directed to leopard42:

*Which best describes the services you require?*

* + Gardening
  + General internal and External Maintenance requests
  + Cabinetry requests
  + Roofing requests
  + Window requests
  + Lock repairs/requests
  + Pest control requests
  + Test and tag requests
  + Playground requests
  + Painting requests
  + Refurbishment requests
  + Electrical works requests
  + Fire safety requests
  + Drainage requests
  + Plumbing requests
  + Material repairs (i.e. traffic signs and blackboards)
  + Signage requirements
  + Furniture maintenance and repairs
  + Structural repairs (usually landlord responsibility)
* People able to make requests:
  + Centre Managers
  + 2IC
  + Responsible Person
  + Approved Service Providers
  + Operations Manager
  + HR Manager
  + Area Managers
* Requests need to capture:
  + Type of problem
  + Trade required (if known)
  + Where the problem is (address and area within location – also linked to HRMS101/Compliance)
    - Centre name
    - Centre abn (for billing purposes)
    - Billing address
    - Business address (if relevant)
    - Site address
      * Classroom 1
      * Classroom 2 etc
      * Bathroom 1
      * Bathroom 2 etc
      * Staff room
      * Training room
      * Meeting room
      * Centre manager office
      * Laundry
      * Kitchen
      * Store room
      * Planning room
      * etc
  + Who reported the problem (based on log in information O365?/HRMS101)
  + Person tradesman can speak to at the centre for attendance (the centre contact)
  + Description of problem and cause if known
  + What they have done to try and solve the problem (if anything)
  + When the problem started
  + How often the problem occurs
  + Urgency of the problem / When it needs to be fixed
  + Photo of the problem
  + When the problem was reported (needs to be recorded)
  + Whether any external services have been notified (i.e. Landlords/DET/Worksafe/Safework)
* Additional requests can be made before submitting – you can have more than one task in a job.
* Maintain will need to create a Job number to assign to the task(s) that can be used as a receipt number for person logging the job.
* Once Job number is assigned, a notification bell on the dashboard should change colour and a text message alert should be sent to notify the Operations Manager of new job request.
  + Text message should advise of:
    - Centre/customer requesting
    - Type of work
    - urgency
* Search function should be able to find a job by any or all of the below fields completed:
  + Job number
  + Centre
  + Problem type
  + Date reported
  + Time frame (dates between) reporting (i.e. job was reported between April and May)
  + Person/Service Provider who reported problem
* Jobs are received only by the Operations Manager of Leopard.
  + Operations Manager requires functions:
    - Contact with Customer made to confirm job
    - Amendments to Job
    - Splitting of tasks for the delegation of job
    - Urgency amendment
    - Ability to reply to customer request
    - Job acceptance email and prefilled expected wait times and processes based on assignment of tasks (Maintain 101 will need to have this as a setting for each type of task)

# PREFERRED SUPPLIERS

* Database and star rating system of preferred suppliers
  + Database to include:
    - Company name
    - ABN
    - ACN
    - Star rating
    - Services/Supplies offered
      * Plumbing
      * Electrical etc etc
    - Areas they service
    - Billing address
    - Billing contact details
    - Trade person details
    - CEO/Director details
    - Link to Service Agreement
      * Expiry date of agreement (if relevant) and notifications/reminders for renewals
    - Insurances Held
    - Qualifications held including trade certs, Police Checks and WWCC
    - History of jobs
      * Timeliness/responsiveness
      * Quality of works
      * Personability
      * Charge amounts
      * Efficiency
      * Best interests – where the tradesperson has notified of other potential issues/maintenance requirements
      * Who had previous communications with the company
    - Notes
    - Approved Service Provider number (required for them to update Maintain101 if their company information is not displaying) and individual PINs for the SP’s staff/trades people
  + Need to be able to view previous quotes and invoices of approved providers
  + Need to be able to query invoices and works and track the conversation
  + All communications and works are to be tracked against the Job, task and preferred supplier. This way it can be viewed from each of the relevant functions of the system
  + Approved Service Provider requires their own portal where they can:
    - report a new job request
    - update their details
    - upload photos of works
    - update progress of works
      * e.g. ordering goods/materials
      * estimated job completion of XXXX-XXXX days
      * council permit application in progress etc etc
    - view the contact details of centre requesting the job
    - view the contact details of Leopard42 Operations Manager
    - upload invoices / find information for sending an invoice to Leopard42
    - upload quotes

# QUOTATIONS

Leopard Operations Manager needs to be able to request quotes and attach them to the job and/or tasks. Therefore a quote request form needs to be inbuilt. (link to Xero?)

* Quote request can be sent to any approved provider in system.
* Alternately, they can be downloaded and emailed to an external not yet in the Maintain system

Costs and time quoted needs to be displayed against the Job and/or task, but quotes can only be viewed in full by opening the link. Operations Manager can attach as many quotes as they need to.

# PURCHASE ORDERS

When a quote is accepted, the Operations Manager needs to be able to convert it into a PURCHASE ORDER of which they can amend. It should also automatically convert the Service Provider to an Approved Provider with a default star rating of 5/5.

(The purchase order is intended to document what has been accepted within the quote and request the works/supplies)

The purchase order, once complete needs to be recorded in Xero and sent to the Approved Service Provider for acceptance.

# WORK/JOB ORDER PROCESS

1. Job Submitted -> Job number provided
2. Job being Assessed
   1. Further information required
   2. Attendance required
   3. Attendance request
   4. Attendance booked
   5. Attendance cancelled
      1. No longer required
      2. Schedule new time
   6. Reschedule required
   7. Quotes being obtained
3. Job cost ($$ would be checked at a Centre Level and then the Customer Entity Level where the Centre Level does not exist or it is above their threshold):
   1. Over $$$ - requires approval from:
      1. Customer rep(s)
      2. Finance?
      3. Shareholders
      4. Etc
   2. Within Service Agreement (less than $$$)
      1. Only Leopard42 Operations Manager approval
4. Job Assigned to XXXX (including landlords)

Within this status, it needs to show the estimated completion time and estimated cost as well as one of the below list (estimated cost only viewable by selected management within customer’s organization, but always visible to Approved Service Providers – $ to be completed and approved by Leopard42 Operations Manager after receiving quote):

* 1. Attendance required
  2. Attendance request
  3. Attendance booked
  4. Attendance cancelled
     1. No longer required
     2. Schedule new time
  5. Reschedule required

1. Job on hold – reasons:
   1. Further information required
      1. CM to provide
      2. Expert advice sought
      3. Upper Management direction required
      4. Financial Approval sought
      5. Legal advice being sought
      6. Legal proceedings on foot
   2. Permit required
      1. Permit Application submitted on dd/mm/yyyy to relevant authority
      2. Permit Denied
      3. Permit Denied and dispute in progress
      4. Permit Approved, Trades being booked and supplies being ordered
   3. Further materials required
      1. Materials currently unavailable – on back order/sourcing elsewhere
      2. Ordered, expected delivery dd/mm/yyyy

# SCHEDULING

1. Inbuilt calendar
   1. Bookings to be visible to:
      1. Service provider – Manager and who they delegate it to within their organization.
      2. Centre receiving service – Manager and 2IC
      3. Trade assigned - Manager of trade assigned
   2. Ability to reschedule bookings
      1. Service Provider can cancel an appointment
      2. Trade can request to reschedule appointment

- request goes to Centre receiving the service, but the Service Provider receives a notification within Maintain101

* 1. Calendar links to Outlook

# WORKS

1. Service Provider/Trade checks into VIZYTOR app on arrival (Maintain101 to plugin here) and enter in Job Number
2. Service Provider/Trade assesses work to be done to check against previous purchase order
3. If works required differ to Purchase Order, photographs to be uploaded as evidence, new description of works required and new estimate of costs requested of Service Provider to Approve. Notification of request for updated Job to be sent to Service Provider.
4. If work authorized to proceed, Trade can either:
   1. Complete works; or
   2. Order and be waiting on supplies to return and complete the works at another time (status of job will then update, notification to both the centre and Service Provider, and option for the Trade to reschedule appointment to undertake the works); or
   3. Have the works on hold while supplies are on back order (status of job will then update, notification to both the centre and Service Provider, and option for the Trade to reschedule appointment to undertake the works); or
   4. Works delayed – trade to complete reasons for delay (i.e. different trade required);
   5. Or job cancelled – trade to complete reasons for cancellation, but status not to be updated. The Service Provider needs to be the one to update this and ensure they are 100% certain the job cannot proceed.
5. Trade always needs to sign out of VIZYTOR when leaving site.
6. If works are completed, photographs of completed works can be uploaded, description made. Status to be updated and notification appears for Service Provider, Trade’s Manager and Centre receiving service.
7. Once the trade has updated the status and photos:
   1. Centre Manager needs to approve of the works – notification sent to Service Provider to advise
   2. Service Provider needs to approve of works.
8. (link to accounting system/HRMS101/VIZYTOR101) Hours worked on job (both onsite [pulled from VIZYTOR), additional hours undertaken to prepare (offsite), and materials required entered into MAINTAIN101 by maintenance person of Service Provider (where Service Provider undertakes the job without a trade)
9. Trade person, where Service Provider has approved their job, uploads their invoice (link to Xero/accounting system)