



Maintaining your Homes for Future Generations

A deep dive on how to create work orders and
inspections

July 30, 2024, at 2:45 P.M.

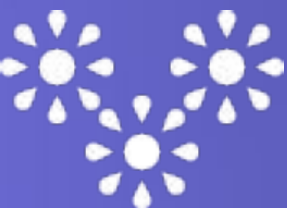
Kanso Training Room



Zach Lenart

Account Executive

Sales & Marketing





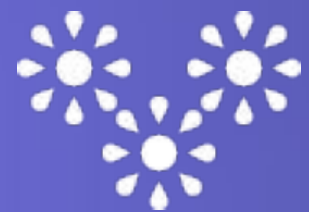
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Developer
Development Team



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Account Manager
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Session Outline

Work Order Configuration

Work Orders

Inspection Templates

Inspections

Inventory

Inspection App

- Configure Work Order Workflow Steps
- Configure Maintenance staff members

The screenshot displays the 'Work Order Configuration' interface. At the top, a navigation bar includes 'WORK ORDERS', 'INSPECTIONS', 'INSPECTION TEMPLATES', 'INVENTORY', 'ACTIVITIES', and 'WORK ORDER CONFIGURATION'. Below this, the main content area is divided into two sections:

- Work Status:** This section is titled 'Work Status' and includes the subtitle 'Configure Work Order Workflow Steps'. It features a list of status options: Unassigned, Assigned, In Progress, In Review, Closed, Deleted, and Archived. Each status has a corresponding toggle switch and a plus icon for adding new configurations. An 'Add New +' button is located in the top right corner of this section.
- Maintenance Staff:** This section is titled 'Maintenance Staff' and includes the subtitle 'Configure Hourly Rates for Labor Cost Tracking' and a link to 'view archived'. It lists several staff members: Daffy Duck The Maintenance Duck, James Gutierrez, Andrew Selberg, Betty White, Bobs Windows, and Batman Electric. Each staff member has a toggle switch and a trash icon. An 'Add New +' button is also present in the top right corner of this section.

Work Order Configurations

Maintenance Staff



General Information

Company Name:

First Name:

Last Name:

Email:

Phone Number:

Hourly Rates

[Add New Rate](#)

No rates have been created. Get started by creating one now.

[Cancel](#)

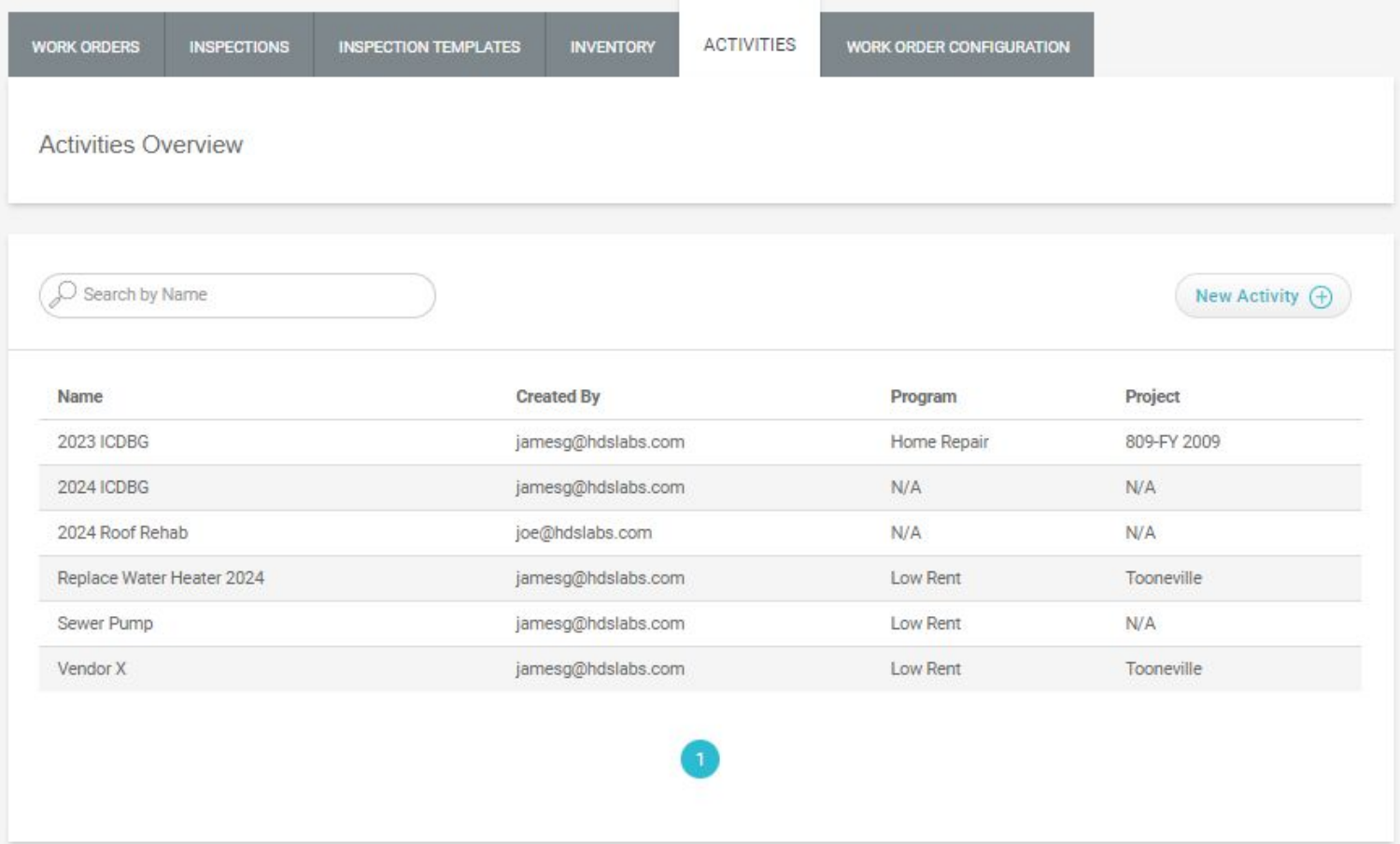
[Save](#)

Adding a Maintenance Staff Member

- The email address used will receive an alert when a WO is assigned to them
- Can add hourly rates for adding labor costs to work orders
 - Multiple hourly rates can be added. Normal, Overtime, Etc...

Activities

- Can be used for grouping work orders
- Can create an “activity” for a Grant for budget tracking purposes
- A specific type of project/activity that you want to track



Name	Created By	Program	Project
2023 ICDBG	jamesg@hdslabs.com	Home Repair	809-FY 2009
2024 ICDBG	jamesg@hdslabs.com	N/A	N/A
2024 Roof Rehab	joe@hdslabs.com	N/A	N/A
Replace Water Heater 2024	jamesg@hdslabs.com	Low Rent	Tooneville
Sewer Pump	jamesg@hdslabs.com	Low Rent	N/A
Vendor X	jamesg@hdslabs.com	Low Rent	Tooneville

Working Through a New Work Order

New Work Order ✕

General Information

Summary: 200 characters max 0 / 200

Work Requested: (optional)

Requested On:

Maintenance Activity: (optional)

Funding Source:

Property Information

Property Type: This is for a housing unit
 This is for a common area

Select a Household:

Or

Select a Unit:

- Maintenance Activity is where to add an activity
- Funding Sources must be configured under set up
- Work orders can be generated for a unit or a common area

* Indicates required fields

Working Through a New Work Order

- Email is sent to worker the WO gets assigned to

The screenshot shows a web form titled "Maintenance Staff Information". It contains the following fields and options:

- Priority:** A dropdown menu with "Normal" selected.
- Permission to enter:** Radio buttons for "Yes" and "No", with "No" selected.
- Search Staff:** Radio buttons for "Staff" and "Vendors", with "Staff" selected.
- Assigned To:** A search input field with the placeholder text "Search staff by name or email".
- Department:** A dropdown menu.
- Status:** A dropdown menu.
- Custom Attributes:** A section with a "required CA:" label and an empty input field.
- Comments:** A section with a "Comments: (optional)" label and a large text area.

At the bottom right of the form, there are two buttons: "Cancel" and "Generate Work Order".

*Once required fields are filled out the generate work order button will light up

Inspection Templates:

Name	Description	Delete	Clone
HQS	HQS Form		Clone
HQS - Copy(1)	HQS Form	Delete	Clone
NSPIRE	NATIONAL STANDARDS FOR THE PHYSICAL INSPECTION OF REAL ESTATE (NSPIRE)		Clone
UPCS	UPCS Form		Clone

Standard Templates:

- HQS Form
- NSPIRE (NATIONAL STANDARDS FOR THE PHYSICAL INSPECTIONS OF REAL ESTATE)
- SCOT Form
- UPCS Form

Create your own

- Clone an existing template
- Build from scratch



Working through an Inspection

- Choose the inspection template you want to use
- Choose the unit you are inspecting and select the household if applicable
- Inspections are broken up by area
 - Keep in mind that you only need to include areas that failed
 - Include all necessary comments
- Can add pictures or documents if necessary
- Can Create a work order from failed inspection

New Inspection

General Information

Inspection Form:

Inspection Type:

Property Information

Search:

Inspection Staff Information

Inspection Date:
(optional)

From: am pm
(optional)

To: am pm
(optional)

Permission to Enter: Yes No

Assigned to:
(optional)

Comments

Comments:
(optional)

Creating a WO from an inspection

New Work Order

General Information

Summary: 200 characters max
Write a brief explanation of the issue*
WO from Failed Inspection on 1225 West Ave
42 / 200

Work Requested: (optional)
Write a detailed explanation of the work requested (optional)
Bathroom: Electrical Hazards failed inspection - broken outlet

Requested On:

Maintenance Activity: (optional)
Search by activity name

Funding Source:

Property Information

Property Type:
 This is for a housing unit
 This is for a common area

Select a Household:

Or

Select a Unit:

Selected Unit: 1225 West Ave Apt. 2 New York, New York 65695

Billable Household:

Automatically pulls on to WO:

- Summary
- Gives a description
- Unit
- Billable Tenant

Basic Inventory:

Used for tracking commonly used materials on work orders

The screenshot displays a software interface for managing inventory. At the top, there is a horizontal navigation bar with several tabs: 'WORK ORDERS', 'INSPECTIONS', 'INSPECTION TEMPLATES', 'INVENTORY', 'ACTIVITIES', and 'WORK ORDER CONFIGURATION'. The 'INVENTORY' tab is currently selected. Below the navigation bar, the page title 'Materials' is visible. A search bar with a magnifying glass icon and the placeholder text 'Search by Name or Identifier' is located on the left. On the right side of the search bar, there is a button labeled 'New Material' with a plus sign icon. Below the search bar, the text 'There are no materials to show' is displayed, indicating that no materials are currently listed in the inventory.

*Included with all packages

Adding New Materials

- Fill out required fields *
- Don't include Quantity - there's no way to track quantity with basic inventory

New Material

General Information

Group:

Name:

Unit of Measurement:

Cost per Unit:

Identifier:

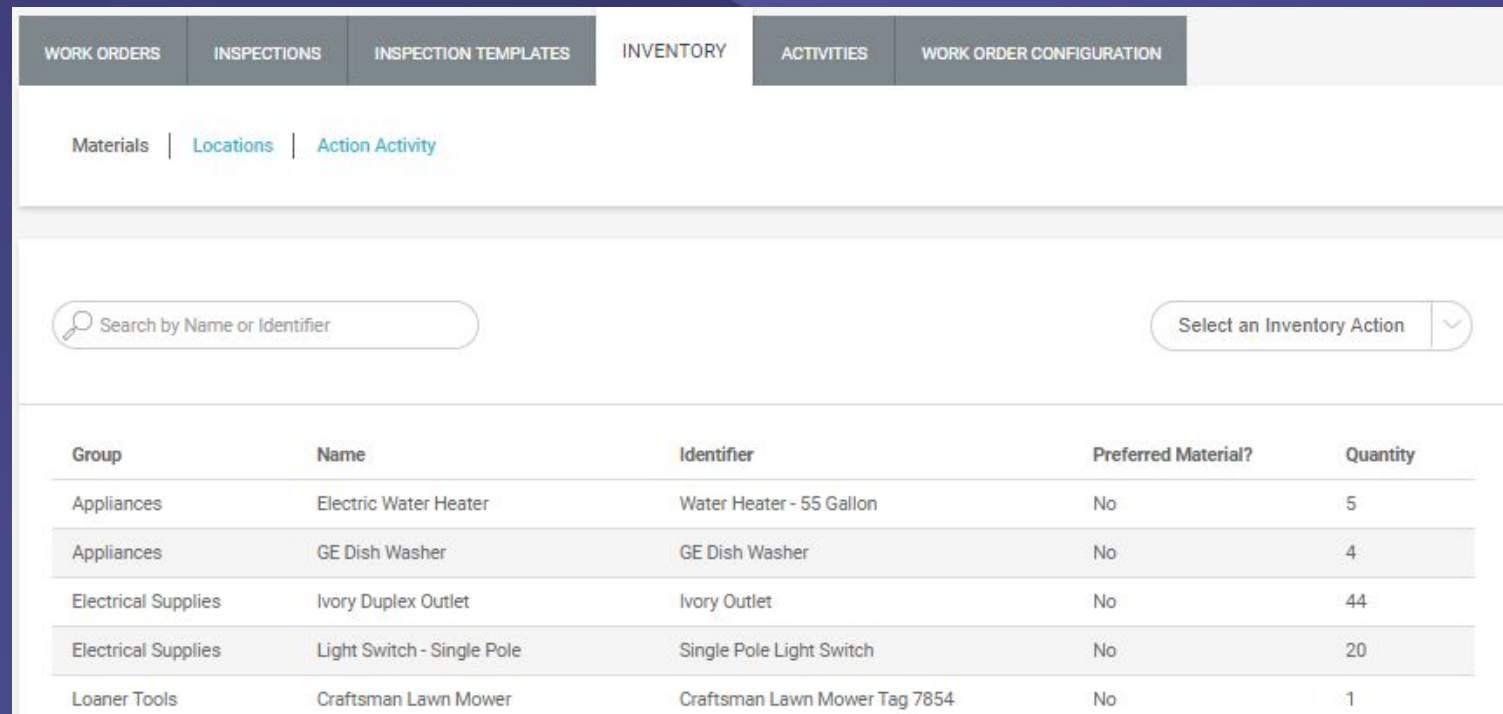
Brand:

Supplier:

Quantity:

Preferred Flag:

Enhanced Inventory



Group	Name	Identifier	Preferred Material?	Quantity
Appliances	Electric Water Heater	Water Heater - 55 Gallon	No	5
Appliances	GE Dish Washer	GE Dish Washer	No	4
Electrical Supplies	Ivory Duplex Outlet	Ivory Outlet	No	44
Electrical Supplies	Light Switch - Single Pole	Single Pole Light Switch	No	20
Loaner Tools	Craftsman Lawn Mower	Craftsman Lawn Mower Tag 7854	No	1

- Keep track of the materials that are kept in stock
 - Add new materials
 - Adjust materials in or out
 - Dispose of unusable materials
- Track the location where materials are located
- Track when and where materials were used

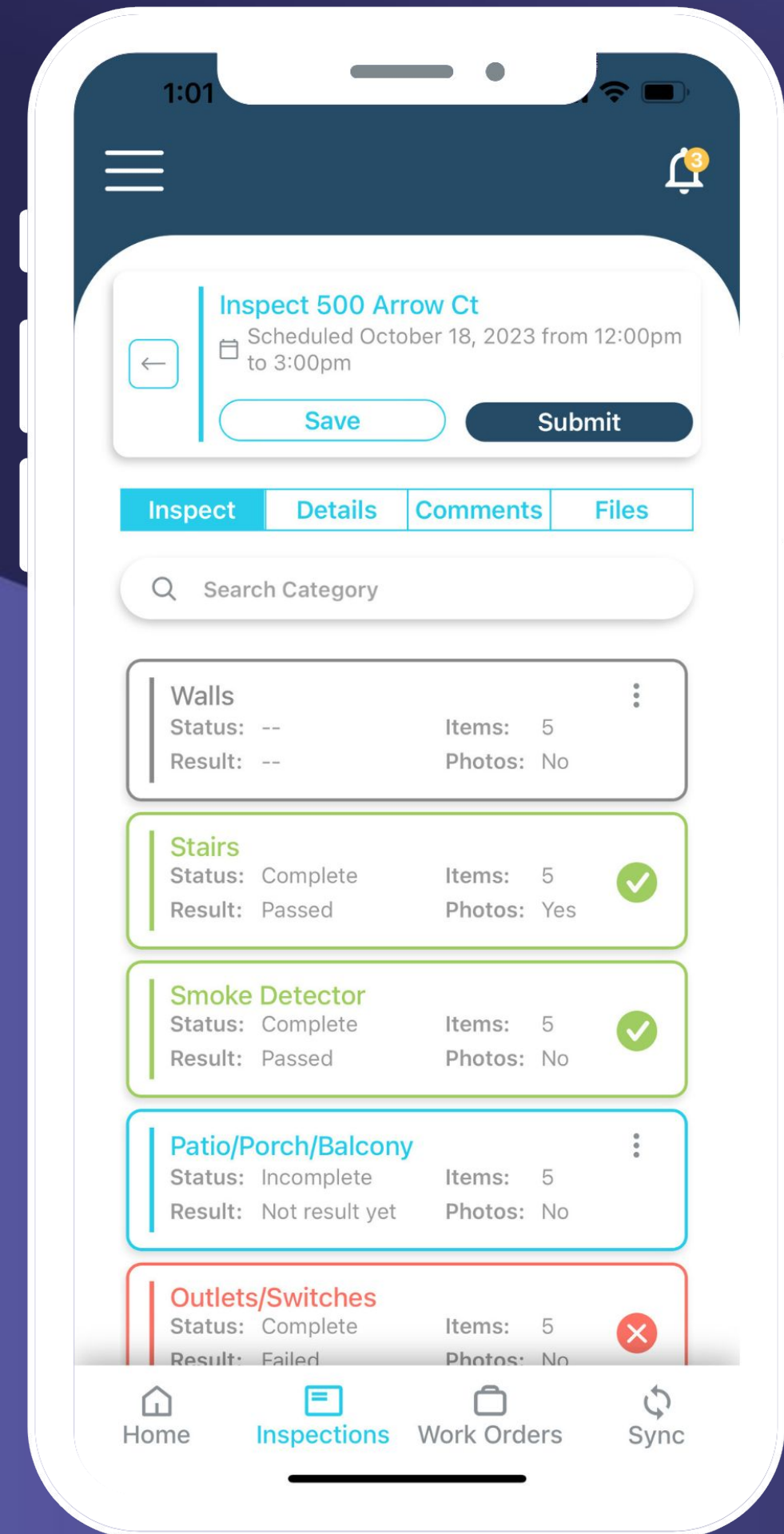
*Included with premium packages

Kanso - Mobile

Maintenance Inspections

Currently in Apple and Android store review process.

- Current inspections application is outdated, and for some, not fully functional, and only available in the Apple app store.
- For the last year we have focused on building a sustainable, easy to update, easy to navigate inspection application for any device.
- We intend to add the work order functionality to this same app in the future, no longer necessary to keep two separate application!



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Wednesday morning's Summit agenda is:

- Kanso Accounting Process for Compliance & Stakeholder Reporting - 9:00am - Main Room
- Getting the most from Kanso - 9:00am - Kanso Trainings
- Kanso Training, Self-Guided Teaching & Support Tools - 10:15am - Main Room
- Closing Out your Books with Kanso - 10:15am - Kanso Trainings
- Lunch - 12:00 pm

After Hours Event details:

4:30pm - Welcome Reception - Rockies Stadium