Kanso Native Housing Summit

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

Speaker Photos

Sam Madison

Developer

Development Team

Joe Prince

Operations Manager

Customer Support and Data Operations

Rachel Majure

Account Manager

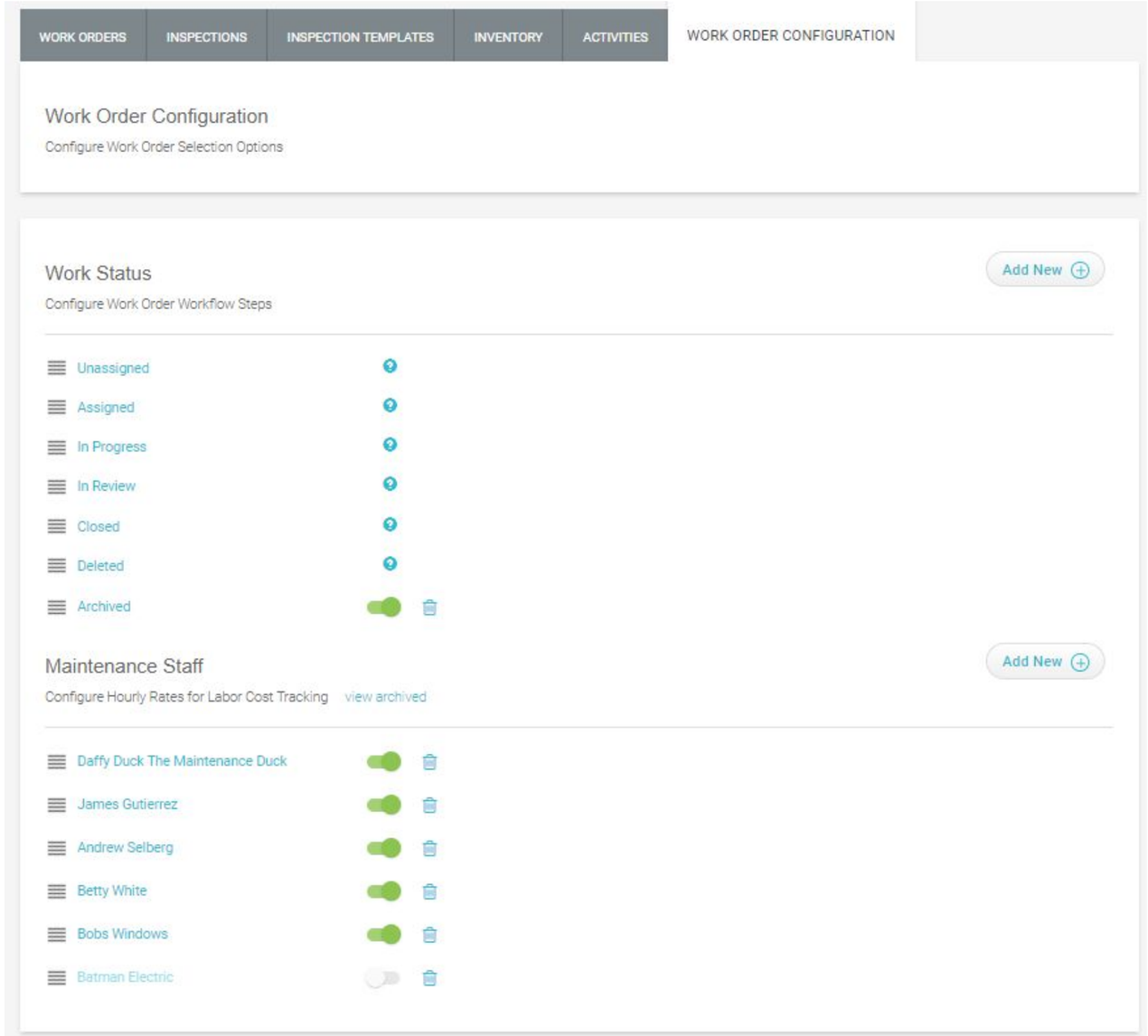
Customer Success Team

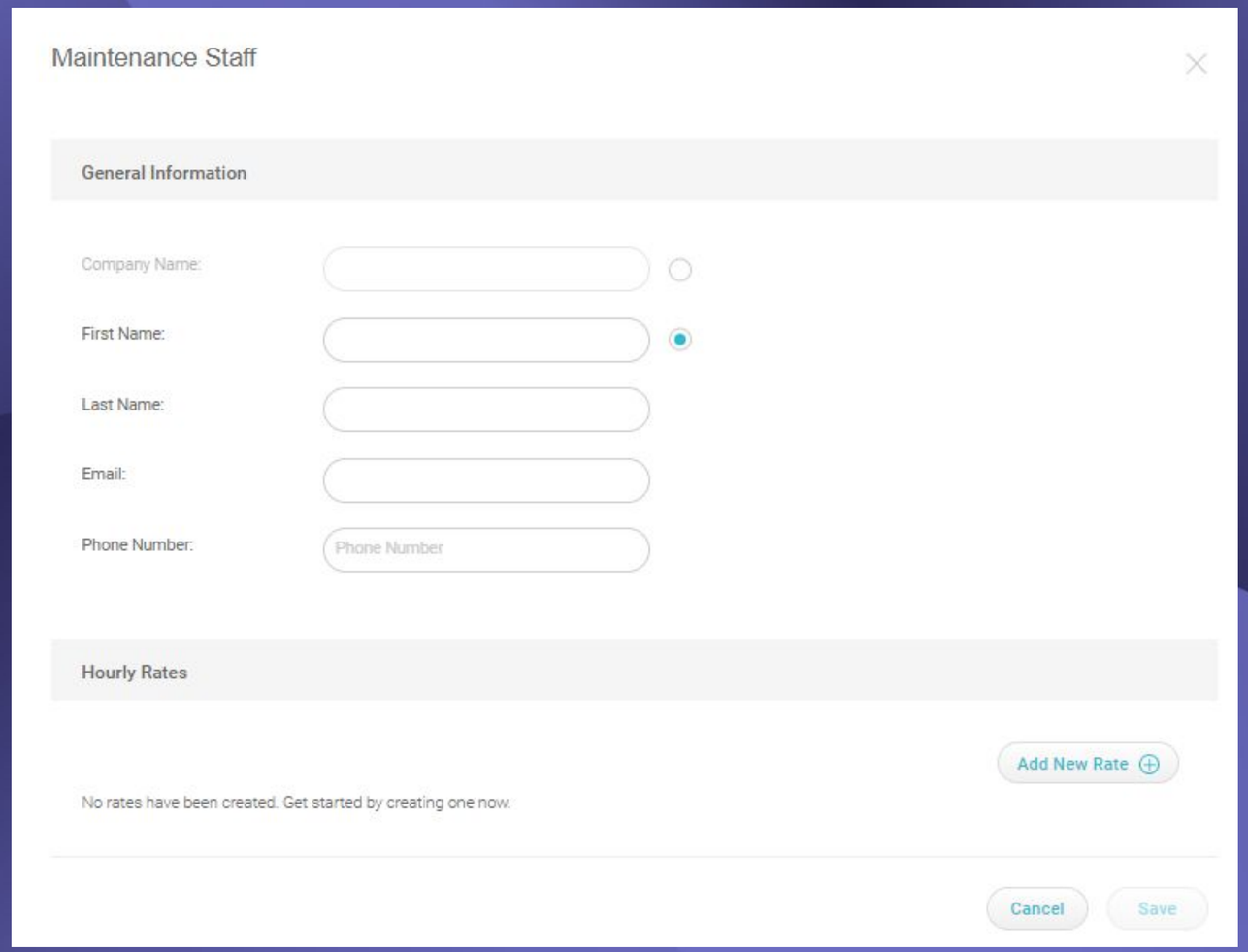
Session Outline

- Work Order Configuration
- Work Orders
- Inspection Templates
- Inspections
- Inventory
- Inspection App

Work Order Configurations

- Configure Work Order Workflow Steps
- Configure Maintenance staff members



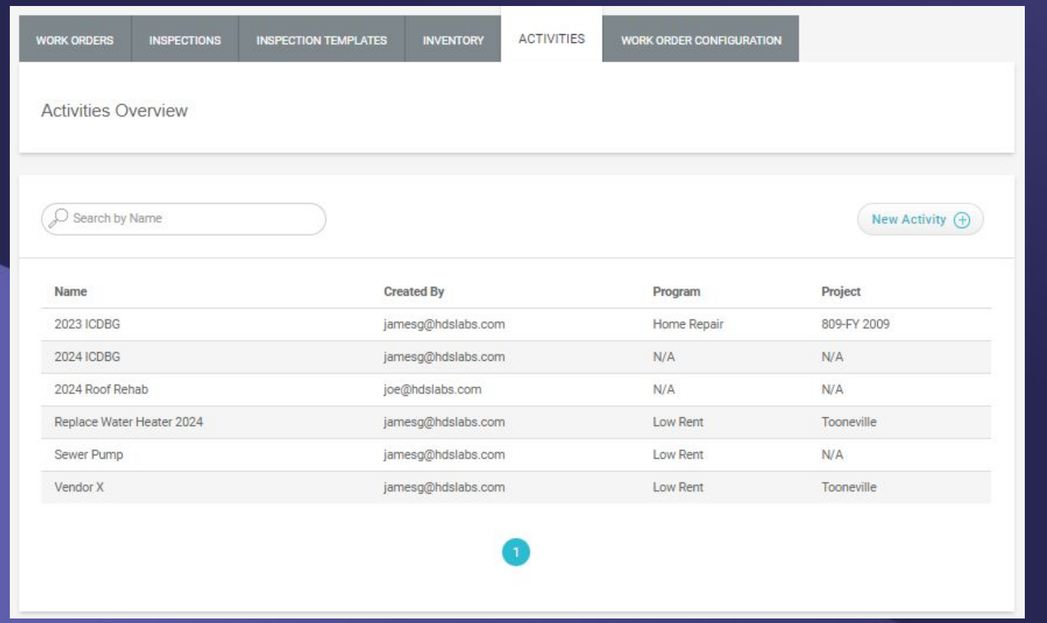


Adding a Maintenance Staff Member

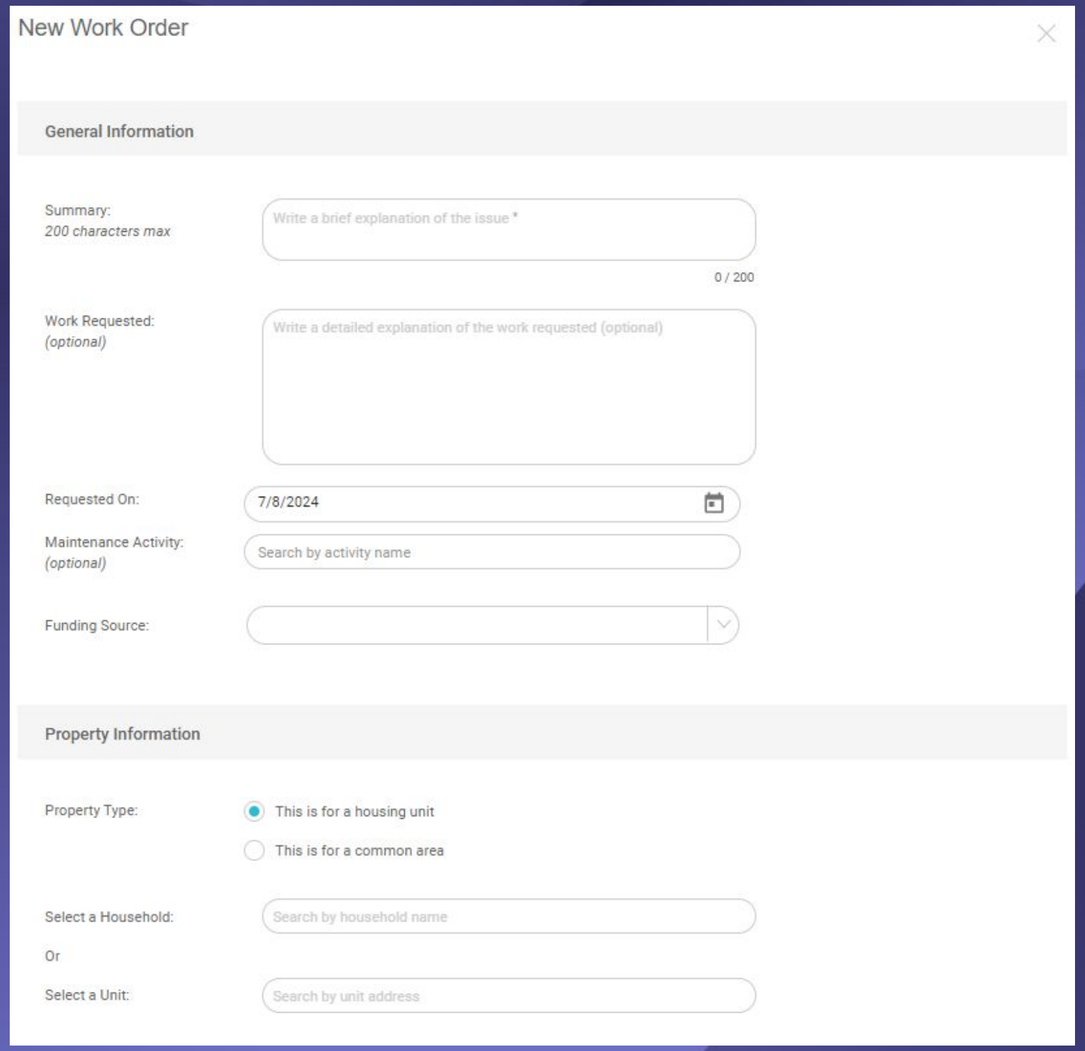
- The email address used will receive an alert when a WO is assigned to them
- Can add hourly rates for adding labor costs to work orders
  - Multiple hourly rates can be added. Normal, Overtime, Etc…

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



Working Through a New Work Order

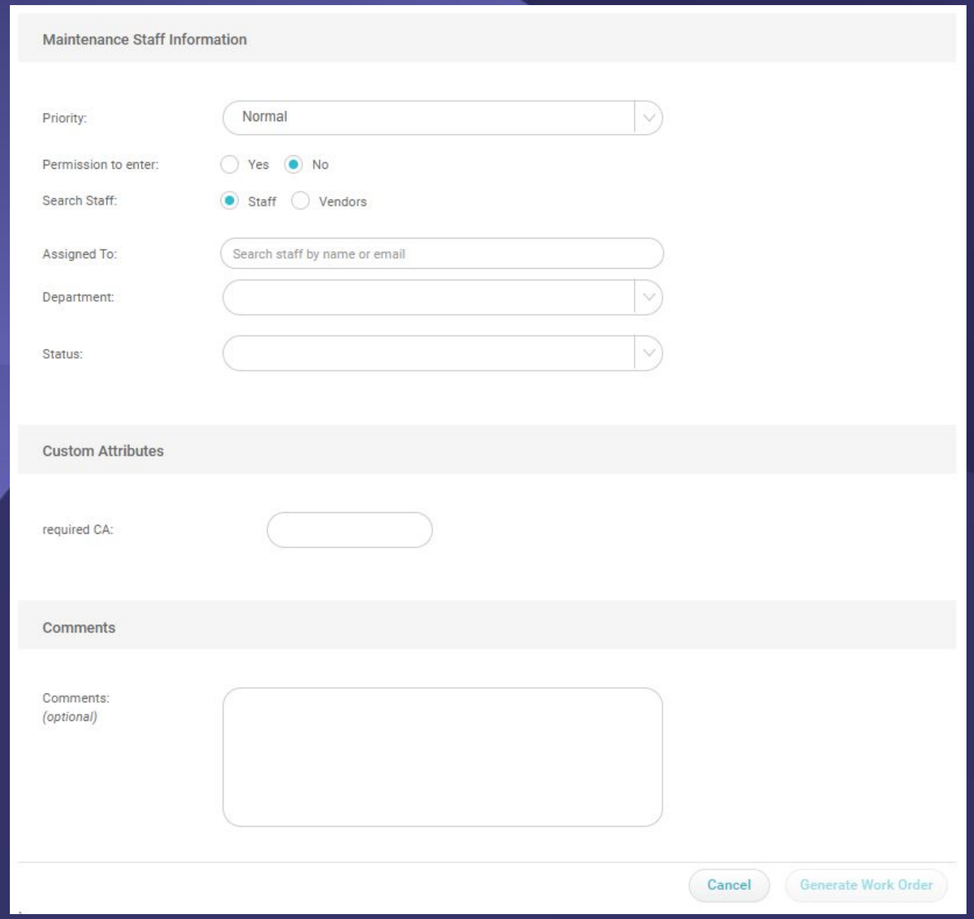


- Maintenance Activity is where to add an activity
- Funding Sources must be configured under set up
- Work orders can be generated for a unit or a common area

* Indicates required fields

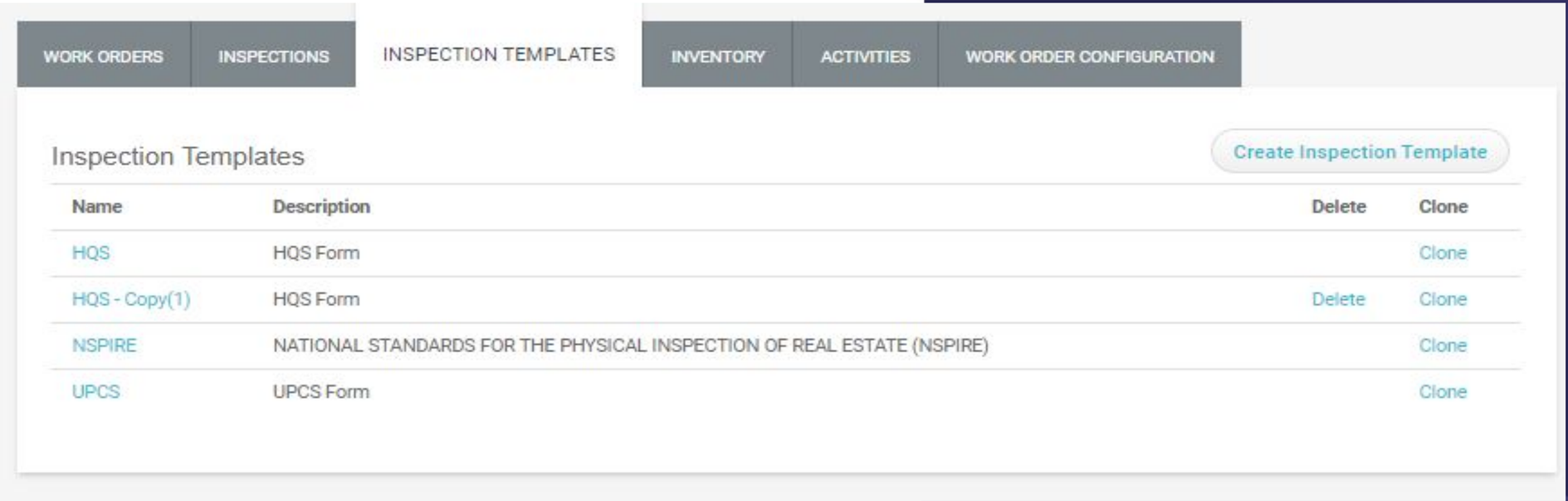
Working Through a New Work Order

- Email is sent to worker the WO gets assigned to



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

Inspection Templates:

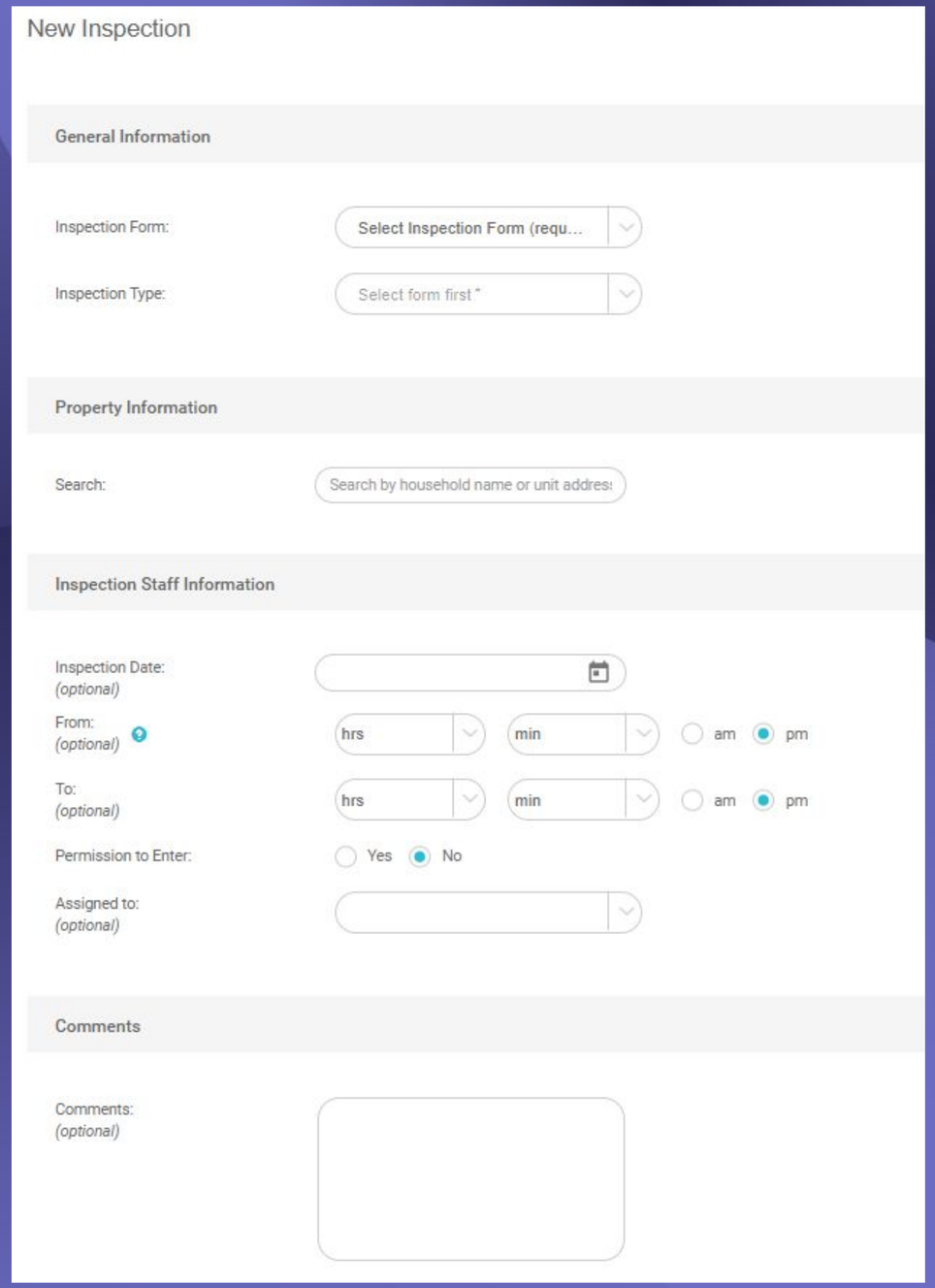


Standard Templates:

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

Create your own

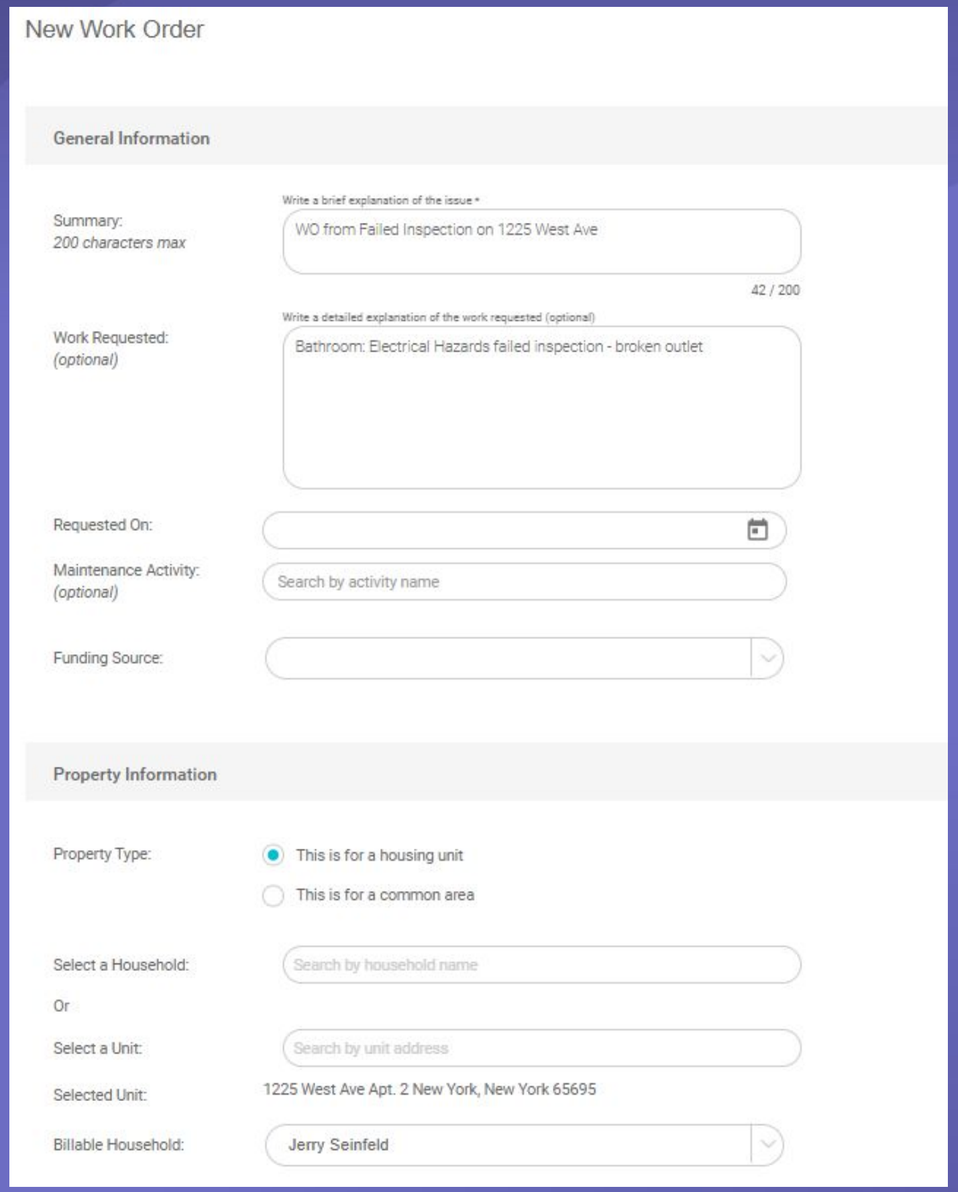
- Clone an existing template
- Build from scratch



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

Creating a WO from an inspection

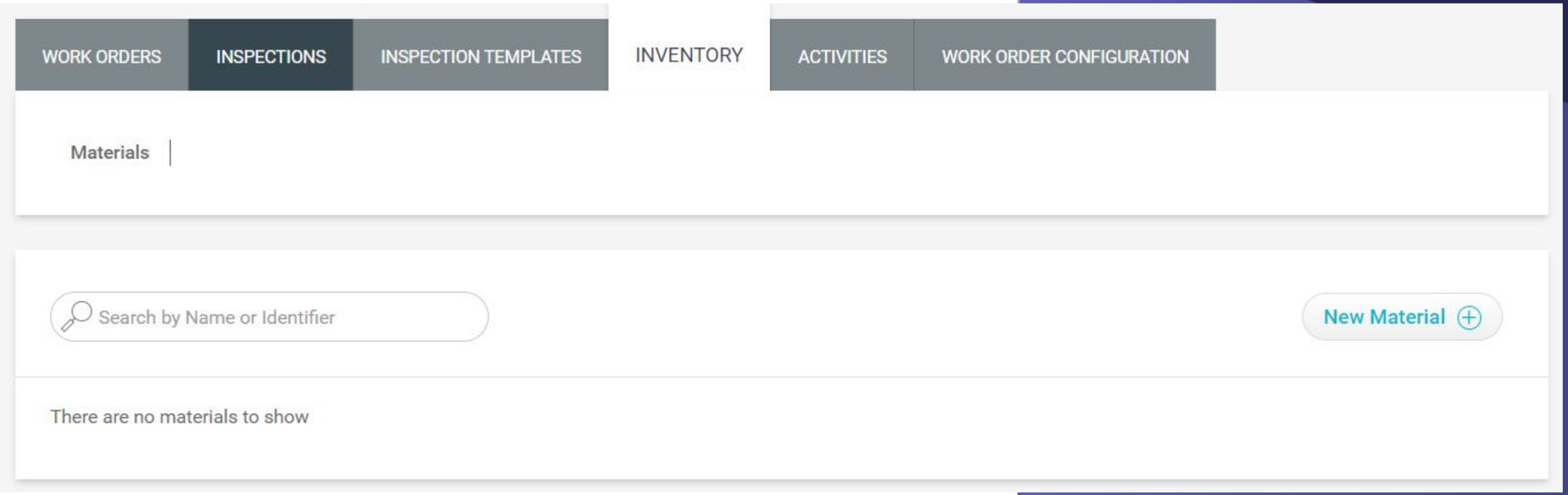


Automatically pulls on to WO:

- Summary
- Gives a description
- Unit
- Billable Tenant

Basic Inventory:

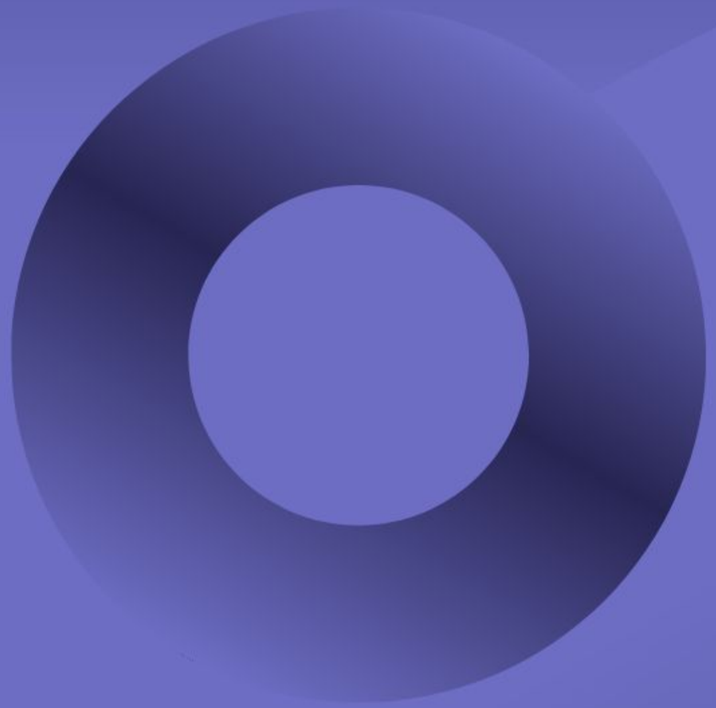
Used for tracking commonly used materials on work orders



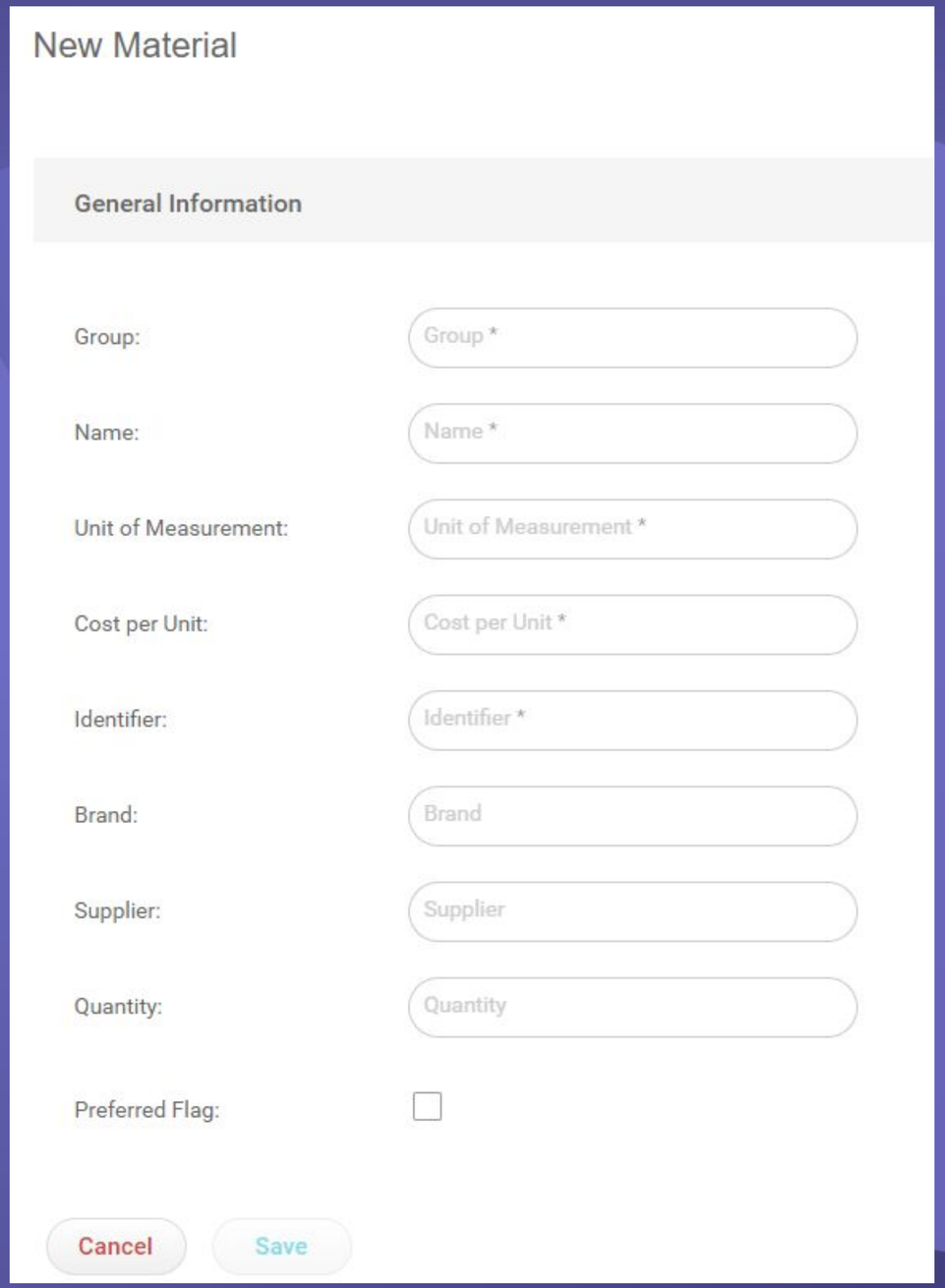
*Included with all packages

Adding New Materials

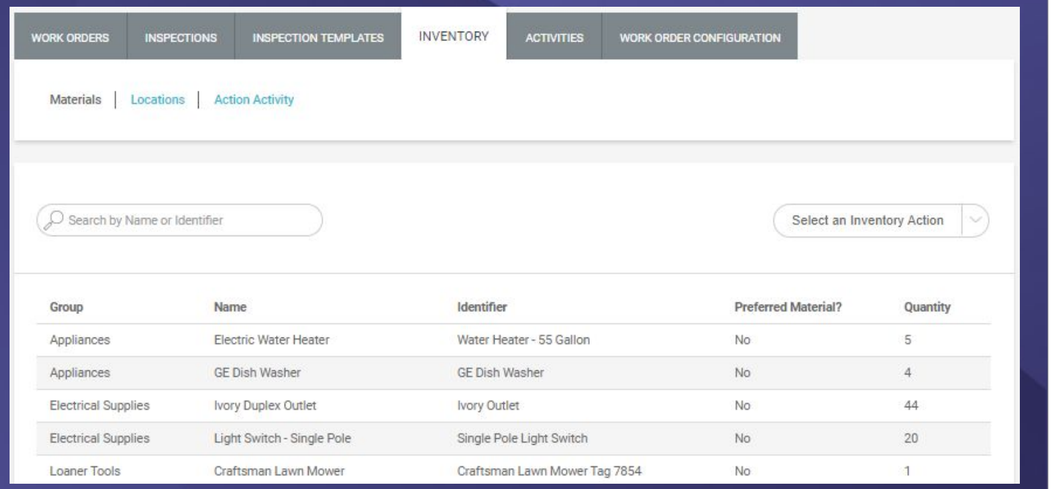
- Fill out required fields *



- Don’t include Quantity - there’s no way to track quantity with basic inventory



Enhanced Inventory



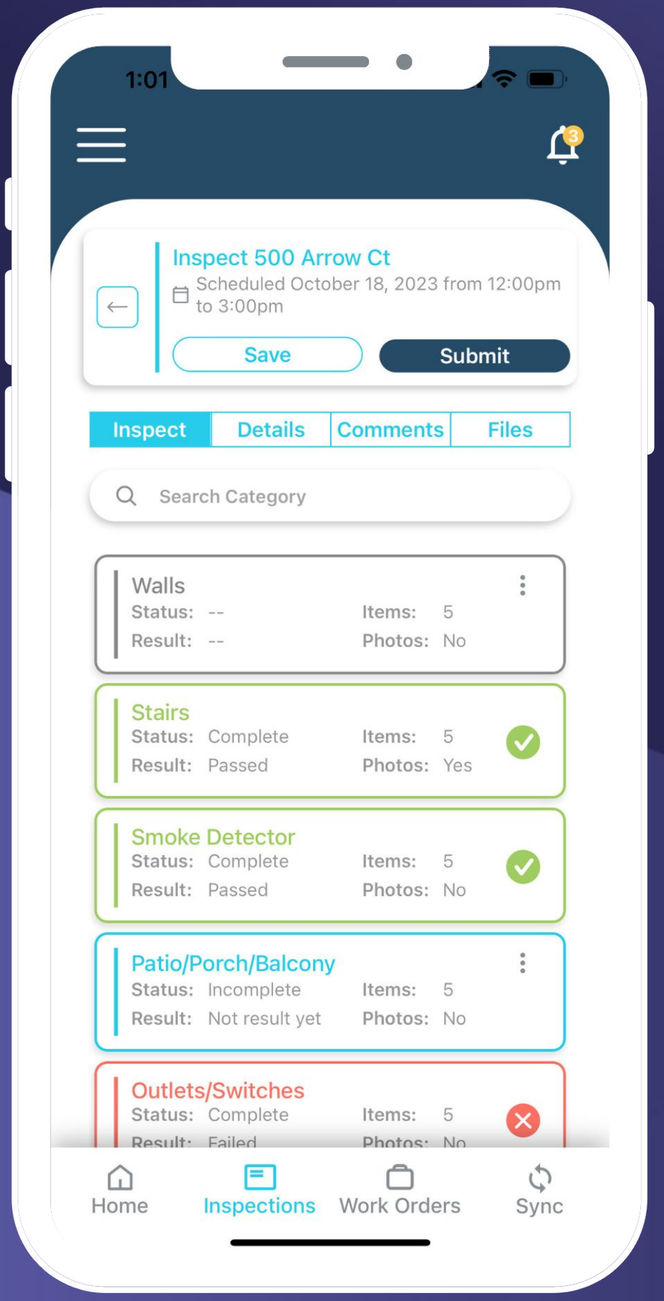
- Keep track of the materials that are kept in stock
  - Add new materials
  - Adjust materials in or out
  - Dispose of unusable materials
- Track the location where materials are located
- Track when and where materials were used

*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