TaskMax Configuration

The configurations for TaskMax can be set in *File > Configure*. The configuration settings are split into three categories; User, System, and DocMax Settings. Once the settings have been amended, TaskMax will need to be reopened to allow the changes to take effect.

> All settings under *System* and *DocMax Settings* are global settings and will affect all users.

Configure

User Settings

User Settings

These settings will only apply to the current logged in user.

Show Building Notes
If enabled, when TaskMax is opened, a prompt will display the option to view TaskMax Notes or Building Notes. Building Notes are entered in the ***Building Information***.

Set User as Job Manager
If enabled, the *Job Manager* will be defaulted to the StrataMax user.

Test Job Details Printing
If enabled, TaskMax will check to ensure the number of lines entered in the work order 'Job Details' field does not exceed the allowed lines for the template. If the number of lines used exceeds the allowed lines, the following message will appear: 'The text in Job Details may exceed the space provided on printed Work Order'.

Include Building Name on Work Order Email Subject
If enabled, the building name will also be added to the subject line of the email when any work order is sent by email.

Auto Insert Invoice Date on Finalise Work Order (if blank)
If enabled, TaskMax will insert today's date when the job is finalised and only if the date field is blank.

Prompt For OK To Pay
If enabled, this will prompt a message: 'Do you wish to proceed with payment?' when a 'Y' is entered into the 'OK to pay?' field.

Selection Status 'Current' to include 'Periodic'

If enabled, the default list in the *Current Work Orders* screen will include *Periodic Work Orders*.

Email Receipt

If enabled, an email receipt will be requested from the email server when the work order has been received by the contractor.

Job Description Lines

This is a variable setting that will limit the number of lines that will appear in the 'Job Description' field of the work order. This is used on certain templates that have limited space.

Confirm On Close

If enabled, the message: 'Are you sure you want to close TaskMax?' will appear when closing *TaskMax*.

User View Options upon Building Selection

Select to either view jobs managed by the user or all users.

Default View Status

Select the status of jobs to view upon opening *TaskMax*.

Always Use Default View

Will observe the above settings and always display jobs with that status.

Display Settings

Quote Display Fields

Add the fields required for the *Quotes* section. Click the field to display a selection list, tag the ones needed, click *OK*.

Work Order Display Fields

Add the fields required for the *Work Orders* section. Click the field to display a selection list, tag the ones needed, click *OK*.

> **Note:** The order in which the fields are tagged will be the order when the columns are displayed.

System Settings

System Settings

Quotes Due Days

Enter default number of days allowed until quote is due.

Quotes Deadline Days

Enter default number of days until the deadline for the quote is due.

Print Notes Default

This is an internal settings, which relates to notes that are added to a job. The notes are not intended to print on work orders, and this setting can be safely ignored.

Use Letter for Originator

If enabled, a preset letter is sent to the *Originator* in addition to the work order/quote request. This setting relates to the Originator's address field, which must be entered when creating a new Job/Work Order.

Advise Job Manager of Activity

If enabled, the Job Manager will receive an email notification if any quotes or work orders are altered by another user. The email address for each Job Manager will need to be set.

Include Finish Date on Periodics

If enabled, this will include the finish date on periodic work orders. This will only apply to templates that includes the finish date, e.g. *WRKORD08* or *WRKORD10*.

Use Roll Service of Notice Address First

If enabled, where the work order *Originator* is a lot owner, and the *Roll* button is used, the *Service of Notice Address* will be used from the **Roll**.

Restrict Invoice Date when Finalising Work Order <=Current Month End +30 days

If enabled, this will restrict the invoice date to the end of the current month +30 days. For example, if the building is in January 2020, the work order can only be finalised as long as the date is not past 02/03/2020 (last day of the current month is 31/01/20 + 30 days (Feb only has 28 days).

Show Payment Authority Details Always

If enabled, when the *New* or *Open* button is clicked in *Work Orders* screen in TaskMax, information from the **Building Information** fields *Invoice Approval Required*, *Payment Authority Required*, *Payment Authority Limit* & *Payment Authority Conditions* will display.

Auto Create Creditor Commitments

Create a creditor commitment once a job has been saved and finalised – this must be ticked if Service Fees are being charged.

Common Prop as Default Prop Affected

Default to Common Property as the Property affected when entering a job.

Notify Account Manager Always

If ticked all work orders will have the *Notify Manager Always* tick box enabled by default.

Use Letter for Copy to Others

To send a preset letter to others nominated rather than the work order/quote request.

Subject List Enabled

If enabled, any entries manually typed in to the Subject line will be added to the Select list. If this feature is not enabled, the Subject description can be manually typed in but not selected from the drop down list.

Send Reject Letter to unsuccessful contractors

If enabled, TaskMax will automatically display a rejection letter to unsuccessful contractors for quotes. The user can chose at the time whether or not to send/print it.

Set current work order owner when issuing

This setting is no longer used and can safely be ignored.

Allow Finalise NOT OKToPay

If enabled, this allows the work order to be finalised without adding Invoice details in TaskMax. This setting is often used when finalising old work orders.

Work Order Conditions Overlay

This setting is no longer used and can safely be ignored.

Service Fees Setup for TRMax and GLMax processing

The below setup should only be used if the Work Order upon Finalisation should be included with the individual expenses. For Service Fees that can be applied at the time of issue for a Work Order or Quote, please see the *Disbursements* article.

Managers Account

Select the global creditor for the Body Corporate Manager.

Service Fee - Fixed Amount / Percentage

Select whether the *Service Fee* is charged based on a fixed rate or percentage of invoice amount.

Service Fee Rate

Relates to the above setting. Enter an amount or percentage if service fee is to be charged. The service fee will charge when the work order is finalised. If work orders are finalised from TaskMax, the setting *Auto Create Creditor Commitments* must be ticked. If work orders are finalised from *Creditor Invoices*, the setting *Auto Create Creditor Commitments* should be unticked.

Process Service Fee to

Enter the expense account code to debit for service fees.

GLMax Invoice Code

Select the GLMax Invoice Code used for the *TRMax* recovery record.

Service Fee Clearing Account

Select the clearing account for service fees. This is only required if the *Process Service Fee To* field (two settings above) has been entered.

Service Fee ticked for new Work Orders

Ticking this setting will automatically tick the *Service Fee* box in the Job Entry screen, when a new job is created.

Send to DocMax

Work Orders to DocMax

Enable Saving Work Orders to DocMax

Work orders will be saved to DocMax when issued.

DocMax Category

Select the DocMax Category for work orders.

Send Work Orders to StrataMax – Internet Group

This refers to the StrataMax Portal Document Group. Simply select the group if required.

Number of Days to Remain Available

Only applies if the above option is set. Select the number of days the work order will remain on the StrataMax Portal.

Invoices

Overwrite Document Title/Description/Subject

If ticked and selecting an invoice document from DocMax to attach to a work order, the title and description fields will overwrite the DocMax properties of selected record.

Quotes

Overwrite Document Title/Description/Subject

If ticked and selecting a quote document from DocMax to attach to a work order, the title and description fields will overwrite the DocMax properties of selected record.

Alerts

There are other fields that can prompt the User to view UI-building-specific information. For example, Asbestos.

In **_Building Information_**, Asbestos Present. If there is known asbestos on-site when flagging this field as a Y, this screen will be provided.