TaskMax Menus

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This article describes the various menus along the top of the main TaskMax window. There are other articles that cover the various processes within StrataMax, which can be viewed from the main TaskMax Online Help page.

File

The *File* menu contains the settings, configuration, and links to other StrataMax menus that relate to TaskMax, for the user's convenience.

Configure

This holds all configuration items for **TaskMax** and its connectivity to other StrataMax modules or menus. The **TaskMax** Configuration article explains this menu in great detail.

Email Template Setup

Please refer to the **Email Template Manager** article to learn how to manage email templates.

Specific Contact Email for Work Orders and Quotes

Each contact can include a specific email address, which will be used for its designed purpose. This includes being able to assign an email address to be used in TaskMax for Work Orders and Quotes. To use this feature, when creating or editing a Contact, ensure that the required email address is set for Work Orders.

Preview Orders

Select this option to preview all quotes and work orders before they are issued to the contractor. If enabled, a tick will appear next to this option.

Print Copy Orders Always

Tick this option to print a duplicate copy when a work order is issued.

Printer Setup

This option will open the *Printer Setup* screen. In this section the letterhead, template, printer and printer tray can be selected for the various documents that relate to work orders and quotes in **TaskMax**. This is also accessed via File / Configure. These documents are:

Work Orders
Used when the *Print* button is clicked in the *Work Order Entry* screen.

Quotation Requests

Used when the *Request Quote* button is clicked in the *Work Order Entry* screen.

Work Order Cancellation

Used when *Cancel Order* button is clicked in the *Work Order Entry* screen.

Quote Rejection - Received

When a quote is accepted, this will be used to notify any unsuccessful contractors with a quote with a status of *B-Received*.

Quote Rejection - Sent

When a quote is accepted, this will be used to notify any unsuccessful contractors with a quote with a status of *A-Sent.*

Quote Cancel - Received

Used when the *Cancel Quote* button is clicked in the *Quotes* screen, on a quote with a status of *B-Received*.

Quote Cancel - Sent

Used when the *Cancel Quote* button is clicked in the *Quotes* screen, on a quote with a status of *A-Sent.*

Originator To Advice

Used to notify the Work Order's *Originator* that the Work Order has been issued. The *Use Letter for Originator* box must be ticked in the **TaskMax** System Settings, as well as the tick box next to the Originator's address in the *Work Order Entry* screen.

Originator Cancellation Advice

Used to notify the Work Order's *Originator that the Work Order has been cancelled.* The *Use Letter for Originator* box must be ticked in the **TaskMax** System Settings, as well as the tick box next to the Originator's address in the *Work Order Entry* screen.

Copy To Advice

Used when the *Use Letter for Copy To Others* box is ticked in the **TaskMax** System Settings.

Quote Confirmation

Used when the *Print Confirmation* button is clicked in the *Quotes* screen to send a letter to recipients, along with the contractor's quote. The quote must have a status of *B-Received.*

Change a TaskMax Template

TaskMax templates are applied globally, which means all buildings will use the same templates for their TaskMax documents, available in this screen.

1. From the list of documents, select the document that needs a different template.
2. Click the ellipsis button *[...]* next to the *Template* name to choose a new template for the selected document.
3. In the *Template Selection* screen, select a template, and click the *Preview* button to preview it.
   - Click *Options > Preview Style* to chose either merge field numbers or names in the preview.
4. When the template has been decided, click the *Select as Global* button.

Change a TaskMax Printer and Paper Source.

A specific printer and paper source on the printer can be chosen for each document type in TaskMax. Meaning, for example, work orders can be printed on the office Hewlett Packard printer, whilst quotes can be printed on the Strata Manager's Canon printer. These steps can be completed for each TaskMax document.

1. In the *Printer Setup* screen, click the *Name:* drop-down menu to select a different printer.
2. By clicking the *Properties...* button, the printer's specific settings window will appear. This screen will differ between printers, depending on what features and capabilities it has.
3. Click the *Paper Source* drop-down menu to select a different tray or source. This list will differ between printers, depending on what features and capabilities it has.
4. Tick the *Save as Default* box to retain the above printer and paper source for all documents within the menu that *Printer Setup* was opened.
5. Choose the number of copies to be printed.
6. Once all options have been set as required, click *OK* to close the *Printer Setup* window.
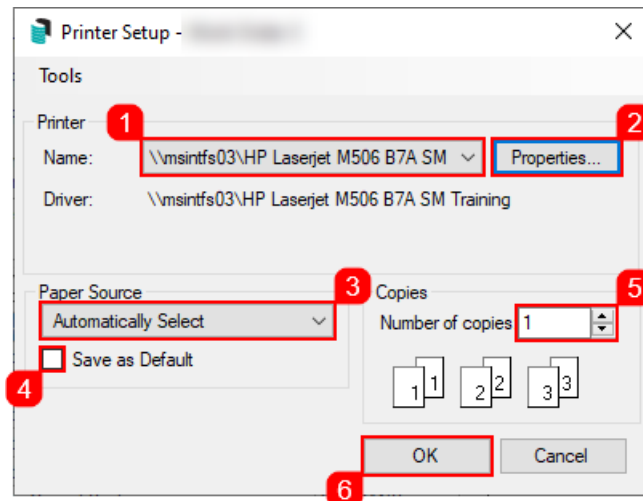
Work Order Instructions

The *Instructions* field is contextual and will change with each document that is selected from the list. The text here will print on the document selected, provided the template chosen contains merge *field 76* (see *Preview Style in the Template Selection screen,* mentioned above). This is a global field, meaning the text here will apply to all buildings.
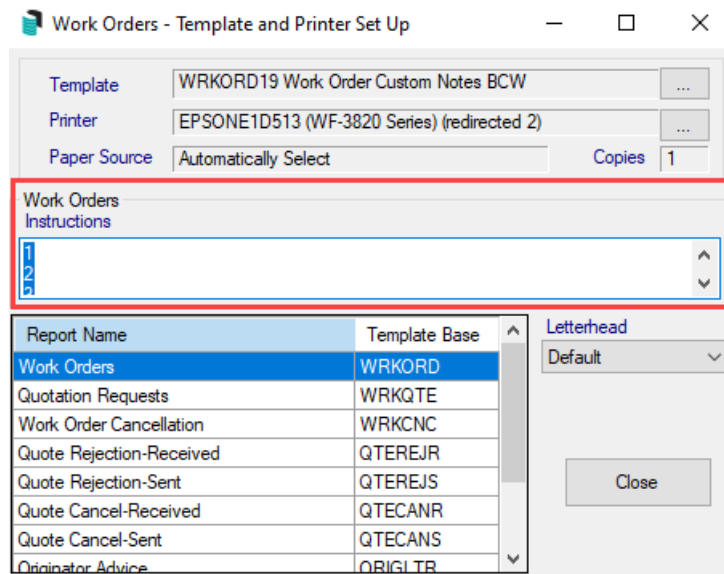
Process Periodic and Future

Clicking this option will process any active Periodic and Future work orders that have a due date on the StrataMax working date or prior. This must be done regularly as these are not issued automatically.

View Phone Log

This option displays details of phone calls made using the Contact function within StrataMax if a soft phone has been installed on the computer and integrated with StrataMax.

Account Manager Edit

This option is here for the user's convenience and opens the *Account Manager Edit* menu.

Creditor Invoices

This option is here for the user's convenience and opens the *Creditor Invoices* menu.

Change Password

This is a legacy option which is no longer used, and can safely be ignored.

Insurance Claim

This option is here for the user's convenience and opens the *Insurance Claims* menu.

Open Jobs Monitor

This option displays a list of jobs and the users that have them open. This checks all users logged into StrataMax in the client's office. Clicking the *Delete* button will not delete the work order from StrataMax - it will simply remove the entry in the list.

Update Periodic Issue Method

This is used to update the method by which contractors receive their work orders. This should be clicked if a periodic work order is active, and the *Issue Work Order by* field (15) in the ***Creditor Maintenance*** menu is updated for the contractor.

Compliance

This option is here for the user's convenience and opens the ***Compliance*** menu.

Alternate Letterhead List

This is a legacy option which is no longer used, and can safely be ignored.