CMMS Pro

Centralized Reporting & Maintenance Management System

User Manual

Edition 1.3 · July 2026

Contents

1. Welcome to CMMS Pro

CMMS Pro is a web-based Computerized Maintenance Management System for managing the day-to-day work of running a facility. It keeps your work orders, assets, locations, parts inventory, preventative maintenance, procurement, safety program, people, and reports in one place, accessible from any web browser or the companion Android app.

The platform is multi-tenant: each organization (a “tenant”) sees only its own data. Your administrator decides which features and pages you can see, so your screen may not show every module described in this manual.

> **Who this manual is for**
>
> This guide is written for everyday users — administrators, managers, technicians, contractors, and view-only staff. It explains what each part of the app does and how to use it. It does not cover server administration or deployment.

1.1 Editions of this manual

CMMS Pro is updated frequently. Screens and labels described here reflect the current release. If something on your screen differs, your organization may be on a newer or older build, or a feature may be turned off for your account or plan.

> **What’s new in Edition 1.3**
>
> This edition adds coverage of the **navigation search box** (find any page by typing), **resizable table columns**, the new **PM Parts Audit** report, the **Description** column on the Productivity Tracker, **Nearby** GPS-proximity sorting of the Assets and Locations lists on phones, a combined **coordinates** column in the Assets and Locations spreadsheet exports, the IT module’s **Network Map** with live device status, and **kiosk mode** for unattended wall-display dashboards.

2. Getting Started

2.1 Signing in

1. Open a web browser and go to your CMMS Pro web address (provided by your administrator).

2. The landing page describes the product. Click the login link to reach the application sign-in screen.

3. Enter your username and password, then select **Sign in**.

4. If you forget your password, use the **Forgot password** link beneath the sign-in button and follow the prompts.

> **Accounts are created for you**
>
> You cannot self-register from the login screen. An administrator at your organization creates your account and assigns your role. If you do not have credentials, contact your administrator.

2.2 The application layout

After signing in you land on the main application. The screen has these regions:

- **Left navigation rail** — a scrolling list of pages and dashboards grouped into sections. What appears here depends on your role, your plan, and the modules your administrator has enabled. The rail remembers your scroll position as you move between pages.
- **Navigation search** — a search box at the top of the rail filters the menu live as you type. Matching pages stay visible, groups containing a match expand automatically, and clearing the box restores the menu to its normal state. Typing a few letters is the fastest way to reach any page.
- **Top bar with quick links** — a row of up to eight customizable shortcut buttons to the pages you use most. Click the gear beside the bar to pick your own shortcuts; the selection is saved per user. The bar appears on every page.
- **Main content area** — the page you are currently viewing: lists, detail screens, forms, and dashboards.
- **Update banner** — when a new version of the app is available, a blue “A new version is available” banner appears at the top. Refresh your browser to load it.

On a phone or tablet the layout changes to an icon-based home menu with large tappable tiles — see Chapter 13, The Mobile Experience.

2.3 Resizable table columns

Every data table in the app has adjustable column widths on desktop. Hover over the boundary between two column headers — a thin tick marks each boundary — and drag. The dragged column and its right-hand neighbor trade space, spreadsheet-style, while the other columns stay put. Widths apply for your current session; reloading the page returns columns to their defaults. On phones and tablets, tables keep their touch-friendly automatic layout instead.

2.4 Plans: CMMS Pro and CMMS Lite

CMMS Pro is offered in two plans. Which one your organization subscribes to determines what you see:

- **CMMS Pro** — the full platform: every module in this manual, billed per seat (Chapter 11).
- **CMMS Lite** — an entry plan covering the core maintenance workflow: work orders, assets (up to 100), locations, parts inventory (up to 100 items), people and teams, vendors and contractors, and the dashboard, at a flat monthly rate.

On a Lite subscription, Pro-only pages appear in the navigation with a small amber PRO badge. Selecting one shows an upgrade prompt instead of the page; upgrading from the Billing page unlocks everything at once. Usage counters on the Assets and Parts pages show how much of the 100-item allowance is in use.

2.5 Roles and what they can do

Every user is assigned a role. Roles determine the broad level of access; your administrator can further fine-tune which individual modules each user sees through the Module Access controls.

Role	Typical use
Sysop	Platform operator. Sees all tenants and every feature; bypasses most access restrictions.
Administrator	Full control within one organization: manages people, settings, billing, and all modules.
Limited Administrator	Administrative access with a narrower scope set by the organization.
Manager	Oversees work, runs reports, reconciles time and productivity, manages safety audits and CAPA.
Technician	Performs work orders, logs time, consumes parts, records readings.
Contractor	Outside labor assigned to specific work orders.
Vendor	External service provider referenced on work orders.
Leaseholder	A tenant of a managed property (Real Estate module).
View Only	Read-only access. Does not consume a paid seat.
Other	General-purpose limited role.

Module Access

Beyond your role, administrators control page-by-page visibility from People → Module Access. If a page named in this manual is missing from your navigation, it is most likely turned off for your account rather than absent from the system.

3. Work Orders

Work orders are the heart of CMMS Pro. A work order records a job to be done — a repair, an inspection, a service request — against an asset or a location, and tracks it from creation through to closure, including the labor time spent and the parts consumed.

3.1 The work order lifecycle

Status	Meaning
Open	Created and awaiting or in progress.
Closed	Completed. Requires logged time and completion notes before it can be closed (see 3.6).
Cancelled	Abandoned without completion.

3.2 Finding your work

When you first open the Work Orders page after signing in, the list starts filtered to work assigned to you, so your own jobs are front and center. To see everything, change the **Assigned To** filter to All — your choice then sticks for the rest of your session. Filters also cover status, date range, completed-by, and free-text search, and the **Clear** button resets them.

3.3 Creating a work order

1. Open the Work Orders page from the navigation.
2. Choose to add a new work order.
3. Fill in the details: a title, the asset or location it applies to, a category, a priority, and an optional description.
4. Assign it: to a person or a team, and optionally a contractor or vendor.
5. Save. The work order opens in the **Open** status, ready to be worked.

Work orders can also be created automatically by other parts of the system — by preventative maintenance schedules, by the Part 139 airfield inspection module, by safety audit findings (Chapter 8), by CAPA actions, and by the inbound email receiver (see 3.8).

3.4 Logging time and consuming parts

On a work order's detail screen you can record the labor and materials used:

- **Time entries** — log hours worked, optionally categorized and attributed to an employee. The Time Logged table on the work order shows every entry.
- **Parts used** — consume parts from inventory. Stock is drawn from your warehouse bins, and the unit cost at the time of consumption is recorded for cost reporting.

- **Attachments and notes** — add photos, documents, and comments to keep a complete record.

3.5 Task timeline (mini-Gantt)

Every work order can carry a small task timeline. Add named tasks with a start and end date, and they render as bars on a shared date axis so you can see the planned sequence of a multi-step job at a glance. Click a bar to mark that task done; overdue tasks are highlighted and a marker shows today's date. The timeline also appears on the printed work order. Tasks remain editable even after a work order is closed.

3.6 Closing a work order

> **Time and completion notes are required to close**
>
> A work order cannot be closed until at least some labor time has been logged against it, and completion notes have been entered. If either is missing you will be prompted to supply it before the close can proceed. The completion notes are mirrored into the work order's comments so they are visible on screen and on the printout.

To close a work order, open it, confirm the time is logged, enter the required completion notes, then use the **Close Work Order** button and complete the close dialog. Closing certain work orders also triggers automatic follow-ups elsewhere — for example, closing a Janitorial/QC work order on a flagged restroom marks that restroom as freshly checked (see Chapter 12).

3.7 Photos, files, and drag-and-drop

Work orders accept photos and document attachments. You can add files with the file picker, or simply drag them from your desktop and drop them onto the work order's attachment area — a drop zone highlights as you drag. Drag-and-drop works across the app's file inputs, including photo uploads and data imports. When using the Android app, you can attach photos to work orders directly from your device camera or gallery.

3.8 Work orders from email

CMMS Pro can receive email and turn it into work order activity in two ways:

- **Replies to an existing work order** — when a message arrives with a subject containing a work-order reference in the form [WO #N], the system matches it to that work order and files the message against it.
- **Submitting a new work order** — a known user can email a dedicated intake address to open a new work order. The email subject becomes the work order title and the body becomes the description; the sender receives a confirmation reply with the new work order number. Staff then triage the priority and assign a location.

Your administrator configures the email addresses used for both flows.

4. Assets, Locations & Categories

4.1 Assets

An asset is any piece of equipment you maintain — a chiller, an air handler, a pump, a vehicle, a door. Each asset has its own record carrying its make, model, serial number, status, assigned user, location, barcode or NFC tag, warranty, and GPS coordinates. Because work orders, parts, preventative maintenance, and photos all attach to assets, the asset record becomes the complete service history for that piece of equipment.

- **Thumbnails** — the Assets list shows a photo thumbnail column so equipment is easy to identify at a glance.
- **Search and sort** — the list is searchable and sortable, and lists across the app sort naturally: item 2 comes before item 10, so numbered equipment reads in true numeric order.
- **GPS coordinates** — assets store latitude and longitude so they can appear on the Facility Map. Coordinates can be entered by hand as a single “latitude, longitude” pair, captured in bulk (Chapter 14), or captured live from your device’s GPS with the Capture button on the asset edit screen.
- **Nameplate scanning** — photograph an equipment data plate and CMMS Pro reads the make, model, serial, and power ratings from the image for review before they are written to the asset (see 5.4).
- **Historical photos** — beyond the identification photos, you can attach any number of dated photos to an asset without needing a work order, building a visual history (see 4.5).

4.2 Asset hierarchy

Assets can be nested: an electrical panel and its circuits, a chiller plant and its pumps, a parent machine and its components. On an asset’s detail page the Asset Hierarchy card shows a link up to the parent asset and a chip for each sub-asset — click either to walk the tree in both directions. Assets without a parent or children simply do not show the card.

4.3 Locations

A location is a place — a building, a room, an area, a restroom, a parking lot, or a leased property. Locations can be nested (a building containing rooms) using a parent/child relationship, and they too carry an address and GPS coordinates. Like assets, locations support photo thumbnails in their list view, and accept historical photos without a work order. The location detail page also lists the assets at that location with their descriptions.

Several modules extend locations by flagging them: restrooms for the Janitorial dashboard, properties for the Real Estate module, and parking lots for the parking views. A single location can serve more than one purpose.

Import and export

Locations can be exported to a spreadsheet and re-imported, making it easy to bulk-create or bulk-edit a facility's location hierarchy. The import matches rows by identifier, resolves parent relationships by name, and updates only the columns you fill in. Exports include both separate latitude/longitude columns and a combined coordinates column (see 9.8).

4.4 Categories

Categories organize your records. Each category has a type — asset, work order, time, or cost — and categories can be nested into hierarchies. Examples include a "HVAC – Preventative" work-order category, or an "AHU PM with Filter Change" category nested beneath it. Choosing accurate categories keeps reports and inventory forecasting meaningful.

4.5 Historical entity photos

Assets and locations each have a photo history that is independent of the small set of identification photos. Use the **Add Photos** control on an asset or location — or drag images onto it — to attach as many dated photos as you like, with no work order required. Photos taken on work orders for that asset or location are pooled in automatically, so the history shows both ad-hoc photos and work-order photos together. Common phone photo formats are accepted and converted as needed.

5. Parts & Inventory

The Parts & Inventory module tracks the materials you stock and consume. Parts are organized by a warehouse bin system and drawn down as work orders consume them.

5.1 Parts and stock

- **Part records** — each part has a name, SKU, category, unit of measure, minimum quantity, and barcode. Non-stock parts can be flagged as such.
- **On-hand quantity** — calculated from the inventory lots currently in stock. Consuming parts on work orders reduces the on-hand total.
- **Bin system** — stock is stored by Warehouse → Row → Bin. Bins are organized per building.

On the CMMS Lite plan, the inventory allowance is 100 part records; a counter on the page shows usage against the allowance.

5.2 Receiving and multi-location stock

You can view inventory across multiple locations and receive new stock directly to a chosen location, so parts are tracked where they physically live. Stock can also arrive through the Procurement module's receiving flow (Chapter 7), which posts received purchase-order lines into inventory.

5.3 Reorder forecast

The reorder forecast estimates upcoming part demand from your active preventative maintenance schedules. For accurate filter forecasting in particular, filter-change PM tasks should be tagged with the correct "Filter Change" category so the forecast counts them once per genuine service rather than once per unrelated inspection.

5.4 Invoice & photo import

CMMS Pro can read a supplier invoice or an equipment photo and turn it into structured data, which you always review before anything is saved. There are three modes, reached from the Invoice Import tab in Reports, from a work order, or from the Parts and Asset pages:

- **Parts invoice** — drop a PDF invoice and the line items are extracted and matched to your existing parts. Review the staging table, choose which lines create new parts, and commit to receive them into inventory.
- **Work-order invoice** — a contractor invoice tied to a work order posts its amount to that work order's contractor charges, records the invoice number, and attaches the PDF.
- **Asset nameplate** — a photo of an equipment data plate is read for make, model, serial, and power. Confirm each field, and the photo is filed to the asset.

Duplicate files are detected so the same invoice cannot be imported twice.

5.5 Electrical panel scanning

From an electrical panel asset, the **Scan Panel** tool reads a photo of the panel's breaker directory and proposes a child asset for each circuit. Review the list — edit names, deselect spares or blanks, and select all or none — then commit to create the circuit assets beneath the panel, inheriting its location and category. Re-scanning flags circuits that already exist so you are not duplicating them.

6. Preventative Maintenance

Preventative Maintenance (PM) schedules generate recurring work automatically so routine servicing is never forgotten. A PM schedule has a title, a starting date, a frequency (for example, every 30 days), a priority, and the asset, location, team, or person it applies to. The PM scheduler runs continuously in the background and spawns work orders as each schedule comes due.

6.1 Creating a PM schedule

1. Open the Preventative Maintenance page.
2. Create a new schedule and give it a clear title.
3. Set the target: the asset or location, and optionally the responsible team or person.
4. Set the frequency: the interval and unit (days, weeks, months) and the next due date.
5. Save and activate. Work orders will be created automatically when the schedule is due.

Tip: categorize filter-change PMs

If a PM involves changing filters, assign it the filter-change category so it feeds the reorder forecast correctly. PMs in the wrong category can distort parts demand projections.

Tip: give every schedule a next due date

The scheduler keys on each schedule’s next due date. A schedule saved without one will not spawn work orders until a date is set — the Generate Now button still works at any time for a one-off run. Auditing whether PM work is consuming the parts it should is the job of the PM Parts Audit report (see 9.5).

7. Procurement

The Procurement module manages money going out: it takes a purchase from request to approval to purchase order to receipt, and ties every dollar back to the work order, asset, location, supplier, and account code it belongs to. It appears as a single Procurement page with tabs for Dashboard, Requisitions, Purchase Orders, Receiving, Spend Analysis, and Setup.

7.1 The purchasing flow

1. **Requisition (PR)** — anyone with access drafts a purchase requisition listing what is needed, line by line, optionally tied to a work order, asset, or location.
2. **Approval** — submitted requisitions route through your organization's approval tiers. Approvers see the request, its lines, and its budget impact.
3. **Purchase order (PO)** — an approved requisition is issued as a numbered purchase order to the chosen supplier.
4. **Receiving** — as goods arrive, receipts are recorded against the PO. Received product lines post into parts inventory; service lines are acknowledged without quantities.
5. **Spend analysis** — every stage feeds the Spend Analysis tab, so spending can be sliced by supplier, work order, location, department, or account.

7.2 Suppliers: vendors and contractors

Purchases are attributed to one supplier, chosen from a combined list of your vendors and contractors:

- **Vendors** supply products — physical goods that are received into inventory with quantities.
- **Contractors** supply services — labor and services with no stock quantity; picking a contractor defaults new lines to service lines.

The Spend Analysis tab includes a Products versus Services split so you can see at a glance how spending divides between materials and outside labor.

7.3 Approvals, budgets, and account codes

- **Approval tiers** — configurable dollar thresholds decide who must approve a requisition. Each tier can name a role or a specific person.
- **Budgets** — budgets can be set globally or per location, department, or grant, each with a soft cap that warns and a hard cap that blocks submission when exceeded.
- **GL accounts and departments** — spending is coded to your organization's own account codes and departments, maintained on the Setup tab.

Setup is administrator-only

The Setup tab — approval rules, budgets, GL accounts, and departments — is visible only to administrators. Creating and submitting requisitions is open to any user granted the Procurement page.

7.4 Traceability

Requisition and purchase-order lines can reference a work order, asset, or location, so a repair part or contracted service is traceable from the job that needed it through to the receipt that closed it out. Spend Analysis rolls purchases up by work order, giving a forensic view of what a job actually cost to supply.

8. Safety Management (SMS)

The Safety Management module brings a facility safety program into the same system as the work it generates. It has three connected parts: safety audits, CAPA actions, and safety fields on incident reports. Access to Safety Audits and CAPA is granted per user through Module Access, and the module is part of the Pro plan.

8.1 Safety audits

A safety audit is a numbered checklist inspection (numbered SA-year-sequence). Create an audit with a title, a type (general, OSHA, facility, and so on), an optional scheduled date, and notes. On the audit's detail page, build the checklist: each item has a description, a result, a severity, and notes.

Item result	Meaning
pass	Inspected and satisfactory.
na	Not applicable or not inspected.
finding	A deficiency requiring corrective work.

Findings become work orders automatically

When you complete an audit, a corrective work order is created for every item marked **finding**, carrying the item's description and severity. High and critical findings are due same-day; others are due the next business day. Spawned work orders start unassigned so a dispatcher or supervisor can triage and route them. Each finding shows a link to its work order on the audit.

Audits move through draft, scheduled, in-progress, and completed statuses. A completed audit becomes a read-only record of what was inspected, what was found, and the work it generated. Managers can delete an audit if it was created in error.

8.2 CAPA actions

CAPA — Corrective and Preventive Action — tracks the follow-through on safety problems. Each CAPA action (numbered CA-year-sequence) has a title, a description, a type (corrective or preventive), an assignee, a due date, and a source: created manually, from an audit, or from an incident. A CAPA can optionally spawn its own work order when created.

The CAPA board lists actions with status chips (open, in progress, closed) and highlights overdue due dates. Click a row to expand it: open actions expose an inline editor for the description, status, assignee, and due date; closing an action records optional verification notes describing how the fix was confirmed, and closed actions expand to a read-only view of that record.

8.3 Incident safety fields

Incident reports (Chapter 15.6) gain a Safety Management panel with fields used by safety programs:

- **Near miss** — marks the incident as a near miss rather than an accident.
- **Non-punitive report** — marks the report as filed under a non-punitive reporting policy.
- **Root cause and investigation notes** — free-text findings from the investigation.
- **CAPA required** — flags that the incident needs a corrective or preventive action.

A **Create CAPA from Incident** button opens a new CAPA action linked back to the incident as its source, so the incident, its investigation, and its corrective action stay connected.

9. Reports

The Reports page is a tabbed hub that brings together the system's analytical views. The exact tabs you see depend on your permissions; Import / Export, for instance, is reserved for administrators and always sits at the far right.

9.1 Overview

The overview tab summarizes cost, labor, parts, and preventative-maintenance activity in a set of cards — a quick health check of your maintenance operation.

9.2 Labor by Technician

The Labor by Technician card totals logged hours and cost per person. Each technician row expands into a drill-down so you can see where the time went:

- **Technician** → **Team** — expand a technician to see their hours and cost broken out by the team each work order was assigned to. Work not tied to a team is grouped as Unassigned.
- **Team** → **Work-order type** — expand a team to split its hours and cost by work-order type, such as corrective or preventative.
- **Type** → **entries** — expand a type to list the individual work orders and time entries behind the numbers. Managers can edit an entry's hours in place.

Each branch expands independently, so opening one team does not collapse another, and the sub-totals at every level roll up to the technician's headline figures.

9.3 Assets & Parts

Lists each asset together with its associated parts, filtered to assets that actually have parts attached. Useful for understanding what materials each piece of equipment consumes.

9.4 Productivity Tracker

Joins labor hours to work performed so managers can see output per person or per row, with the ability to edit individual entries. Each row now includes a Description column showing the work order's description (long text is shortened on screen — hover to read it in full), so you can judge the work behind the hours without opening each work order. Access is gated by a productivity-reconciler permission.

9.5 PM Parts Audit

The PM Parts Audit tab finds preventative-maintenance work that was completed without consuming any parts. Choose a date range and a status (Closed is the default; Open and All are available) and select **Run**. The report lists every PM-generated work order in the range with zero parts recorded against it — date, work order number, title, the PM schedule that spawned it, status, and who completed it. Every row links through to the work order itself.

Why this matters

A filter-change PM closed with no filters consumed usually means the parts were never logged — which quietly starves the reorder forecast and understates job cost. Running this audit periodically keeps PM parts usage honest.

9.6 Time Reconciliation

Lists closed work orders whose logged hours fall at or below a chosen threshold, so managers can find and correct under-logged jobs. You can bulk-assign an employee and hours, and the completed-by name is shown for context.

9.7 Bulk GPS

An administrator tool for adding map coordinates to many locations and assets at once. See Chapter 14.

9.8 Import / Export

Administrators can import and export data here, including the Locations import/export described in Chapter 4. This tab is always positioned at the far right of the Reports hub.

The Assets and Locations exports include separate latitude and longitude columns plus a combined **coordinates** column formatted as a single “latitude, longitude” pair — the same format the app’s edit screens accept — so coordinates can be copied between the spreadsheet and the app without reformatting. Re-importing an exported file works unchanged; the combined column is informational and the importers read the individual columns.

10. People, Teams & Access Control

These administrative pages are grouped beneath the CMMS Admin section in the navigation.

10.1 People

The People page lists the users in your organization. Administrators create accounts, set roles, activate and deactivate users, and control what each person can see.

- **Module Access** — a per-user grid of toggles, organized into sections (Dashboards, Core, Parts & Inventory, Maintenance, Operations, Procurement, Safety, People & Admin, and more), that turns individual pages on or off for that user. CMMS Pro uses a deny-by-default model: managed users start with no access and are granted pages explicitly. Administrators and sysops bypass these restrictions.
- **Seat enforcement** — on subscription accounts, each active non-view-only user consumes a paid seat. View-only users are free. If you are out of seats, adding a user is blocked with a message pointing to the Billing page (see Chapter 11).

> **30-day reactivation lock**
> If a user is deactivated and then reactivated within 30 days, the action is blocked for ordinary administrators (a sysop can override). This prevents toggling accounts off and on to avoid seat charges. The block message states how many days remain.

10.2 Groups (Teams)

Teams group users for assignment and gating. Work orders can be assigned to a team rather than an individual, and some modules are restricted to specific teams — for example, the IT Department portal is limited to the IT team. Team assignment also drives the labor drill-down in Reports and can trigger optional new-work notifications (10.5).

10.3 Global Permissions

The Global Permissions page holds organization-wide permission settings. It sits inside the CMMS Admin navigation group alongside People, Groups, Billing, and Feature Request.

10.4 Feature Request

Use the Feature Request page to send a suggestion to the CMMS Pro team. Your name pre-fills, you confirm your company code, type your request, and submit. The message is emailed to the product team along with technical context that helps them follow up. This page is currently restricted to administrators.

10.5 Notification preferences

Each user can choose to be emailed when certain work-order events happen. These preferences are per-user and off by default, so notifications only arrive for the events a user opts into. The available notifications are:

- **New team work order** — a new work order is assigned to one of the user’s teams.
- **Note added** — someone adds a note to a work order assigned to the user.
- **Closed by someone else** — a work order assigned to the user is closed by another person.

A user is never emailed for their own actions — adding your own note, or closing your own work order, does not notify you. Notification emails are sent from your organization’s configured system address.

11. Billing & Plans

CMMS Pro offers two plans and two billing models. What your Billing & Seats page shows depends on your organization's plan and how it is billed.

11.1 CMMS Lite

CMMS Lite is the entry plan at a flat $20 per month. It covers the core maintenance workflow — work orders, assets, locations, parts inventory, people and teams, vendors and contractors, categories, and the dashboard — with an allowance of 100 assets and 100 inventory items. Pro-only pages remain visible in the navigation with an amber PRO badge; selecting one shows what the Pro plan adds and a one-click path to upgrade from the Billing page.

11.2 CMMS Pro: self-service (Stripe) accounts

Pro self-service accounts are billed by the seat through Stripe. Seats are priced in volume tiers — the more seats, the lower the per-seat rate — and all seats bill at the tier rate that matches the total count.

Seats	Price per seat / month
1 – 5	$49
6 – 10	$45
11 or more	$39

On the Billing & Seats page an administrator can see paid, used, and available seats, the subscription status, the next billing date, and the volume-rate table. The **Change paid seats** control adjusts your seat count: increasing seats charges an immediate prorated amount through Stripe and takes effect at once. Reducing seats requires first deactivating enough users to fall within the new count.

11.3 New customer sign-up

1. Choose a plan on the marketing site and start the 14-day free trial. Your payment method is collected securely by Stripe and is not charged until the trial ends; you can cancel anytime during the trial.
2. You are redirected to a welcome page that confirms your plan and trial.
3. Choose a company name and a unique short company code, then create your administrator username and password.
4. Your organization is provisioned and you are signed in automatically.

11.4 Invoiced accounts

Invoiced accounts are billed manually rather than by card. The system tracks seat usage but never enforces a limit or cuts off access. The Billing & Seats page for an invoiced account shows an "Invoiced account” banner, the current and peak seat counts for the month, a running total, and a table of monthly invoices.

- **High-water billing** — each month is billed on the highest number of seats reached during that month, using the same volume tiers shown above.
- **Downloadable invoices** — administrators can download each month’s invoice as a branded PDF, and can generate the current month’s invoice on demand from the Billing page.

12. Operational Dashboards

Dashboards present a wall of color-coded tiles for at-a-glance status across many items. They refresh when you navigate to them and when you use the Refresh button. Your administrator grants access to each dashboard individually.

12.1 Restrooms (Janitorial / QC)

The Restrooms dashboard shows one tile per restroom and tells you at a glance which restrooms are clean, overdue, or have a maintenance issue.

Tile appearance	Meaning
Green	Quality-checked within the current frequency window.
Red	Overdue, or never checked.
Yellow left half	Has an open maintenance work order (something other than a QC job).

A restroom is marked as freshly checked in two ways: tapping **Mark QC Pass** on its tile, or closing a Janitorial/QC work order on that restroom. The frequency window (how long a check stays “good”) is adjustable on the Dashboard Tuning admin page, where administrators can also flag which locations count as restrooms.

12.2 HVAC Equipment

The HVAC dashboard mirrors the restroom board but for equipment — chillers, compressors, rooftop units, and air handlers.

Tile appearance	Meaning
Green	Nothing to report — no open work orders.
Yellow	An open non-PM (corrective) work order is on the asset.
Red	Out of service — an open work order flagged out-of-service.
Pink left half	An open preventative-maintenance work order (shown over the base color).

Base color follows the precedence red, then yellow, then green; the pink half-overlay is added whenever an open PM exists. So an asset with both a corrective job and a PM shows yellow with a pink left half. Closing the relevant work order returns the tile to green. Administrators flag which assets are HVAC equipment, by pattern or by category.

12.3 Kiosk mode — dashboards on a wall display

Dashboards can run unattended on a wall-mounted monitor or TV. **Kiosk Mode**, available from the navigation rail, puts the app into a clean full-screen display view — the navigation and controls are hidden and the dashboards rotate automatically at a fixed interval, cycling through the boards chosen for that display. Sign in on the display device (a dedicated view-only account is recommended), start kiosk mode, and the rotation runs hands-free. This is ideal for a break-room or operations-center screen showing restroom and HVAC status all day.

12.4 Other dashboards

Depending on your organization, additional dashboards may be enabled, including airfield, parking, terminal, and ground-support views. These are controlled by Module Access like every other page.

13. The Mobile Experience

CMMS Pro adapts to phones and tablets, and is also available as an Android app. The app wraps the same system, so everything you do in a browser works on mobile.

13.1 The icon home menu

On a phone, signing in lands you on an icon-based home menu instead of the desktop dashboard: large tappable tiles for Work Orders, Assets, Locations, and the Facility Map. Each tile opens the full page — mobile uses the same screens and data as the desktop, just arranged for touch. A launcher button in the top bar returns you to the menu from any page.

13.2 Work orders on a phone

The work-order list renders as stacked cards on a phone: each card shows the title, a status badge, a priority pill, the due date, and the assignee. Tap a card to open the work order. The list starts on your own assigned work, and team groupings remain as section headers. Filter dropdowns use your phone's native pickers for clean touch selection.

13.3 Nearby — what's around you

On a phone, the Assets and Locations lists can sort themselves by how close each record is to where you are standing. A **Nearby** header appears at the top of the list showing the search radius, the accuracy of the GPS fix, and how many records are within range — tap it to re-locate. Records inside the radius float to the top, closest first, each with a green distance badge; everything else follows below an "Outside immediate area" divider in the usual order.

An asset without its own coordinates borrows them from its location (or that location's parents), so a well-plotted location hierarchy makes Nearby useful even before individual assets are pinned. Indoors, where GPS is less precise, the radius widens automatically with the fix accuracy. If location permission is denied or no fix is available, the list simply shows in its normal order.

13.4 Cameras and GPS

On mobile you can attach photos to work orders straight from the camera or gallery, scan barcodes and equipment nameplates with the camera, and capture live GPS coordinates onto assets and bulk GPS rows (requires the secure HTTPS address and location permission).

13.5 Installing the Android app

1. On the login screen, look for the "Get the App" Android badge beneath the sign-in button.
2. Tap it to download the app package (APK).
3. Approve installation from your browser when Android prompts you (you may need to allow installs from your browser in Android settings).
4. Open the app and sign in with your usual credentials.

14. Maps & GPS

14.1 The Facility Map

Assets and locations that carry GPS coordinates appear as pins on the facility map. A Layers panel lets you toggle categories of pins on and off, including open work orders, and — where those modules are in use — airfield inspection points and incident pins. Adding coordinates to a record makes it appear on the map. Each user can set their own default map centerpoint so the map opens where they work.

14.2 GPS on a record

Coordinates are entered as a single “latitude, longitude” pair on asset and location edit screens, or captured live from your device with the **Capture GPS** button. Capture requires the secure (HTTPS) address and browser location permission.

14.3 Bulk GPS entry

The Bulk GPS tool, found on the Reports hub (administrators only), lets you add coordinates to many records at once. It presents two tabs — Locations and Assets — listing only the records that are currently missing coordinates.

1. Open Reports and select the Bulk GPS tab.
2. Choose the Locations or Assets tab.
3. Enter coordinates per row as a “latitude, longitude” pair, or use the Capture button to read your device’s current GPS position.
4. A live check marks each row valid or invalid as you type. Latitude must be within ±90 and longitude within ±180.
5. Choose **Save All Filled**. Valid rows are saved and drop off the list on reload; invalid rows stay so you can fix them.

> **Capturing GPS on a phone or tablet**
> The Capture button uses your device’s location services and works on iOS and Android over a secure (HTTPS) connection. If capture fails, check that you granted the browser location permission and that you are on the secure (HTTPS) address, not an insecure one.

Plotted coordinates pay off across the app: records appear on the Facility Map, the mobile Nearby sort (13.3) can rank lists by distance, and spreadsheet exports carry a ready-to-use combined coordinates column (9.8).

15. Specialized Modules

CMMS Pro includes several optional modules built on the same work-order and location foundation. Your organization may use some, all, or none of them.

15.1 Fleet Vehicle Maintenance

The Fleet module manages vehicles — trucks, vans, carts, tugs, sweepers. Each vehicle is also an asset, so its work orders, parts, photos, and PM schedules all work automatically.

- **Vehicle records** — unit number, VIN (unique within your organization), license plate and state, year, type, purchase details, and in-service date.
- **Usage readings** — log odometer miles and engine hours over time; the latest reading is shown on the vehicle for quick reference.
- **Disposition** — track a vehicle's lifecycle status: in service, out of service, surplus, sold, totaled, or retired.
- **Repairs** — use the standard work-order system for all maintenance, drawing parts from the warehouse and logging labor.

15.2 Real Estate / Property Management

The Real Estate module turns CMMS Pro into a landlord and property-management tool. Properties are locations flagged as such, and the module adds tenants, leases, rent schedules, payments, and cost recovery.

- **Properties** — flagged locations, including multi-unit properties (parent/child) and land.
- **Lease types** — gross, single-net, double-net, triple-net, residential-full, and land.
- **Leaseholders** — a single tenant directory with full add, edit, and delete (a tenant with active leases cannot be deleted).
- **Rent & payments** — generate a rent schedule for a lease and record payments against it.
- **Cost recovery** — flag a work order as CAM-recoverable, then recover its cost to one chosen lease; the charge flows into that property's profit-and-loss view.

Real Estate appears as an expandable navigation group with a Dashboard of property tiles and a Leaseholders directory. Each property tile opens a detail screen with Leases, Payments, Costs, and P&L tabs.

15.3 IT Department Portal

The IT portal is a self-contained help-desk and asset-tracking area for the IT team. It includes an asset register, a software-license tracker with renewal reminders, a markdown knowledge base, and ticketing handled through the work-order system. Access is restricted to the IT team.

The portal also includes a **Network Map** — a live diagram of the devices the IT team registers (servers, switches, cameras, printers, kiosks, and so on). The system probes each device's network address on a regular cycle and colors it by reachability, so an unreachable device stands out at a glance and outages are spotted from the dashboard rather than from a complaint. Device records carry the address, type, and notes, and tie into the same asset and ticketing plumbing as the rest of the portal.

15.4 Part 139 Airfield Inspections

The Part 139 module supports FAA airfield inspections for aviation facilities. It automatically spawns work orders from inspection findings and provides a pin-walk map with satellite imagery so inspection points and resulting work can be tracked spatially.

15.5 FDOT Grant Compliance

The Grant Compliance module adds a grant-funded-asset compliance layer on top of the existing asset, work-order, and document plumbing. It tracks grant-funded assets, useful-life monitoring, annual physical inventory, disposal accounting, and produces auditor-ready document packages.

- **Grant assets** — flag assets as grant-funded through a dedicated intake form, recording grant number, funding source, federal participation percentage, useful-life, and placed-in-service date.
- **Useful-life monitoring** — the end of useful life is computed from the in-service date and useful-life span, with a manual override available when a grant amendment changes it.
- **Annual physical inventory** — record verification events against each grant asset to satisfy inventory requirements.
- **Audit documents** — upload typed documents (purchase orders, invoices, grant agreements, inspection reports, before/after photos, disposal records) to a dedicated store per asset.
- **Disposal accounting** — record a disposition and the module computes the federal share owed from the fair market value at disposition and the participation percentage, applying the applicable small-value threshold and selling-cost deduction, and flags early disposals.
- **Compliance status** — a computed status (compliant, attention, non-compliant) surfaces assets that are past useful life, overdue for inventory, missing documentation, or carry an outstanding disposal obligation.
- **Audit package** — export a combined PDF and Excel package with a per-asset document manifest, ready to hand to an auditor.

The module presents Dashboard, Inventory, and Reports tabs, plus a grant-asset intake form. A legal disclaimer notes that the module is a compliance aid, not legal, accounting, or audit advice; confirm figures against your own grant agreement.

15.6 Incident Reporting

The Incident Reporting system records incidents through a full create, review, approve/reject, and close workflow, and plots them on a facility map layer with their own pins. With the Safety Management module enabled, incidents also carry near-miss, root-cause, investigation, and CAPA fields — see Chapter 8.

15.7 Parking

The Parking page shows occupancy across lots. A dedicated Employee Parking card groups employee lots separately; those lots are excluded from the revenue-producing “spaces available” totals so they do not distort public-parking figures.

16. Tips & Troubleshooting

Situation	What to do
A page named in this manual is missing from my navigation.	It is likely turned off for your account. Ask an administrator to enable it under People → Module Access. The navigation search box only filters pages you already have.
A page shows an amber PRO badge and an upgrade prompt.	Your organization is on the CMMS Lite plan and that page is part of Pro. An administrator can upgrade from the Billing page.
Work Orders only shows my own jobs.	The list starts filtered to you each session. Set the Assigned To filter to All to see everything, including unassigned work — the choice sticks until you sign in again.
I cannot close a work order.	Log at least one time entry and enter the completion notes first. Closing is blocked until both are present.
I completed a safety audit but expected more work orders.	Only items whose result is set to finding spawn work orders. Pass and na items do not.
A PM schedule never creates work orders.	Check that the schedule is active and has a next due date set — a schedule without one will not spawn. Generate Now can always create the work order on demand.
I am told I am out of seats when adding a user.	Your subscription seat limit is reached. An administrator can add seats on the Billing & Seats page, or set a user to View Only (which is free).
Adding an asset or part is blocked on CMMS Lite.	The Lite plan includes 100 assets and 100 inventory items. Retire unused records or upgrade to Pro for unlimited records.
Reactivating a user is blocked.	The 30-day reactivation lock is active. Wait out the remaining days shown, or ask a sysop to override.
My column widths reset.	Resized column widths last for the current session by design. Reloading the page restores the default layout.
The app looks out of date after an update.	Refresh your browser. If the “new version available” banner appears, refresh to load it; a hard refresh clears stale files. On a phone, clearing the site data in your browser settings forces a clean reload.
A restroom tile is red but it was just cleaned.	Mark QC Pass on the tile, or close the Janitorial/QC work order for it. Red means overdue or never checked.
An HVAC tile shows yellow but I expected pink.	Yellow is a corrective (non-PM) work order. Pink marks a preventative-maintenance work order. An administrator can confirm the PM category is set correctly.
A scanned invoice or nameplate came back with a blank field.	Re-scan with a straight-on, well-lit photo. Extraction quality depends on image clarity; you can always correct any field before committing.

Situation	What to do
I did not get a notification email I expected.	Notifications are opt-in and per-user. Check your notification preferences, and note that you are never emailed for your own actions.
GPS Capture does nothing.	Grant the browser location permission and make sure you are on the secure (HTTPS) address.
The Nearby section does not appear on my phone.	Nearby needs location permission, a GPS fix, and records with coordinates. If nothing is plotted within range, the list shows in its normal order. Tap the Nearby header to retry the fix.

16.1 Getting help

If you are stuck, contact your organization's CMMS Pro administrator first — they manage accounts, roles, and which features are enabled. For product suggestions, use the Feature Request page (Chapter 10.4). For account-level or billing questions on self-service accounts, an administrator can also manage the subscription directly through Stripe's own portal where configured.

17. Glossary

Term	Definition
Asset	A piece of equipment or item you maintain; the anchor for work orders, parts, PM, and photos.
CAM	Common Area Maintenance — costs that can be recovered from a property tenant (Real Estate module).
CAPA	Corrective and Preventive Action — a tracked safety follow-up, closed with verification notes.
Dashboard	A board of color-coded tiles giving at-a-glance status (e.g., Restrooms, HVAC).
Finding	A safety-audit checklist item marked deficient; automatically spawns a corrective work order.
GL account	A general-ledger account code used to categorize procurement spending.
Grant asset	An asset flagged as grant-funded and tracked for useful-life, inventory, and disposal compliance.
Kiosk mode	A full-screen, hands-free display view that rotates dashboards on a wall monitor.
Lite / Pro	The two CMMS Pro plans. Lite covers the core workflow with record allowances; Pro includes every module.
Location	A place: building, room, area, restroom, lot, or property. Can be nested.
Module Access	Per-user controls that turn individual pages on or off.
Nameplate scan	Reading an equipment data plate from a photo to fill in asset fields for review.
Nearby	The mobile list mode that sorts assets and locations by distance from your current GPS position.
Network Map	The IT portal's live diagram of registered devices, colored by reachability.
PM	Preventative Maintenance — recurring scheduled work generated automatically.
PO	Purchase Order — a numbered order issued to a supplier from an approved requisition.
PR / Requisition	Purchase Requisition — a request to buy, routed through approval tiers before a PO is issued.
QC	Quality Check — a restroom cleaning/inspection pass.
Receiving	Recording the arrival of purchase-order goods; product lines post into inventory.
Safety audit	A numbered checklist inspection whose findings spawn corrective work orders.

Term	Definition
Seat	A paid user slot on a Pro subscription. Active non-view-only users consume seats.
Sysop	System operator — the platform-wide administrator across all tenants.
Tenant	An organization with its own isolated data within CMMS Pro.
VIN	Vehicle Identification Number — unique per vehicle within an organization (Fleet).
Work Order	A tracked job against an asset or location, with time, parts, and status.

— End of Manual —