

Tracking Maintenance Activities

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Tracking Maintenance Activities

Why is it important?

Saves money long term

Preserves property values

Ensures building safety

Tracking Maintenance Activities

Barriers

No institutional memory

Accounting systems geared to single year

Accounting systems geared to \$\$ not activities

Work orders not component specific

No professional maintenance plan

Tracking Maintenance Activities

Tracking methods

Chisel and stone

Pen and paper

Computer – non-specific software

CMMS Software

- Too Complex
- Too Costly

Tracking Maintenance Activities

The Basics Required

Properties

Contacts

Assets

Schedules

Activities – Maintenance Procedures

Workorders

Tracking Maintenance Activities

Property List

F7 Dashboard > Properties

Properties

Name ↕	Type ↕	Year Constructed ↕	Address ↕	City ↕	State ↕
Arbi Coast HOA	Commercial	2018	150 Seabreeze Trail	Arbiston	SC
Crystal Cove Condominiums	HighRise	2020	789 Ocean Drive	Laguna Beach	CA
Ormond Lakes HOA	Resort	2010	1200 Lakeside Blvd	Ormond Beach	FL
Santa Lucia Ranch	PlannedDevelopment	2015	4321 Ranch View Dr	Santa Lucia	TX

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Tracking Maintenance Activities

Work Orders Combined Properties

F7 Dashboard > Schedules

Company Schedules Create Schedule

Search for schedules Location Filter Property Filter View

Name	Property Name	Asset Name	Location Name	Frequency	Assignee Name	Start Date	End Date	Est Time	
Annual	Ormond Lakes HOA	Chimney C	Ocean Breeze Center	Annually	Robert Johnson	Apr 15, 2025	Jul 22, 2026	2 hours	
Quarterly	Ormond Lakes HOA	Chimney Caps	Ocean Breeze Center	Quarterly	Robert Johnson	Apr 17, 2025	Jul 21, 2026	2 hours	
Annual	Ormond Lakes HOA	Main Door	Sunset Retreat	Annually	Robert Johnson	Apr 15, 2025	Jul 23, 2026	1 hour	
Annual	Arbi Coast HOA	LG 2 Ton	Seaside Pavilion	Daily	Alice Smith	Apr 16, 2025	Apr 18, 2025	2 hours	
Annual	Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Annually	Robert Johnson	Apr 17, 2025	May 20, 2026	2 hours	
Semi-Annual	Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Semiannually	Robert Johnson	Apr 17, 2025	Apr 20, 2026	2 hours	
Semi-Annual	Ormond Lakes HOA	Main Door	Sunset Retreat	Weekly	Robert Johnson	Apr 16, 2025	Jul 17, 2025	2 hours	
Cat dog	Arbi Coast HOA	Toytomi Convection Oven	Harbor View Center	Daily	Alice Smith	Apr 20, 2025	Apr 24, 2025	7 hours	
Replace	Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Daily	Robert Johnson	Apr 17, 2025	Apr 21, 2025	1 hour	
Replace	Ormond Lakes HOA	Main Door	Sunset Retreat	Daily	Robert Johnson	Apr 16, 2025	Apr 23, 2025	2 hours	

Property Filter: Ormond Lakes HOA (12) Arbi Coast HOA (4)

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Tracking Maintenance Activities

Select Single Property

F7 Dashboard > Properties > 58

Ormond Lakes HOA

Property Name

Ormond Lakes HOA

Address

1200 Lakeside Blvd

City

Ormond Beach

State

FL

Zip Code

32174

Country

USA

Property Type

Resort

Nr. of Units

0

Year Constructed

2010

Optional Note

A well-maintained community with scheduled HVAC and pool maintenance.

Assets Schedules Contacts Work-Orders

Tracking Maintenance Activities

Work Orders Single Property

Property Work Orders Create work order

Search for work orders Property Filter Priority Filter View

Property Name	Assets	Location	Priority	Type	Assigned to	Status	Due Date	
Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Routine	0	Robert Johnson	Open	May 5, 2025	
Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Routine	0	Robert Johnson	Open	May 4, 2025	
Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Routine	0	Robert Johnson	Open	May 3, 2025	
Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Routine	0	Robert Johnson	Open	May 2, 2025	
Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Routine	0	Robert Johnson	Open	May 1, 2025	
Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Routine	0	Robert Johnson	Open	Apr 30, 2025	
Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Routine	0	Robert Johnson	Open	Apr 29, 2025	
Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Routine	0	Robert Johnson	Open	Apr 28, 2025	
Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Routine	0	Robert Johnson	Open	Apr 27, 2025	
Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Routine	0	Robert Johnson	Open	Apr 26, 2025	

Tracking Maintenance Activities

Select Single Asset

Property Schedules

[Create Schedule](#)[View](#)

Name	Property Name	Asset Name	Location Name	Frequency	Assignee Name	Start Date	End Date	Est Time	
Annual	Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Annually	Robert Johnson	Apr 17, 2025	May 20, 2026	2 hours	
Semi-Annual	Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Semiannually	Robert Johnson	Apr 17, 2025	Apr 20, 2026	2 hours	
Replace	Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Daily	Robert Johnson	Apr 17, 2025	Apr 21, 2025	1 hour	
Monthly	Ormond Lakes HOA	Rooftop HVAC System	Lakeview Lodge	Monthly	Robert Johnson	Apr 15, 2025	Jan 7, 2026	2 hours	

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Tracking Maintenance Activities

View Asset Schedules / Procedures

Property Schedules Details Edit Schedule

Here you can find asset schedule details

Name * Annual	Property Name * Ormond Lakes HOA
Asset Name * Main Door	Location * Sunset Retreat
Frequency * Annually	Assignee Name * Robert Johnson
Start Date * Apr 15, 2025	End Date * Jul 23, 2026
Estimated Time * 1 hour	
Description * 1. Professional Maintenance: <ul style="list-style-type: none">Schedule regular maintenance visits by qualified HVAC technicians to perform comprehensive inspections, cleaning, and servicing of the unit.Professional technicians can identify potential issues early, recommend necessary repairs or adjustments, and optimize the performance of the HVAC system.	

Tracking Maintenance Activities

Adding New Asset

F7 Dashboard > Properties > 58 > Asset > Create

Property Assets Details

Here you can create a property asset

[Cancel](#) [Save Asset](#)

Name *
Rooftop HVAC

Location *
Lakeview Lodge

Estimated Life *
20

Acquired Date *
Apr 15, 2025

Barcode *
2144

Images *
Upload 

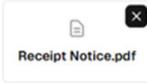
Type *
HVAC 2 Ton System

Property Name *
Ormond Lakes HOA

Cost *
\$20000

Serial Number *
SN-T124

Condition *
Good

Documents *
Upload 

Schedules

[Create Schedule](#)

Search for schedules [Location Filter](#) [Property Filter](#) [View](#)

Name	Property Name	Asset Name	Location Name	Frequency	Assignee Name	Start Date	End Date	Est Time	
Annual	Ormond Lakes HOA	Rooftop HVAC	Lakeview Lodge	Annually		-	-	1 hour	
Monthly	Ormond Lakes HOA	Rooftop HVAC	Lakeview Lodge	Monthly		-	-	1 hour	

Tracking Maintenance Activities

Create Contact

Property Contact Details

Create a contact

Company Name *

LemonJuice

First Name *

First Name

Contact Note *

Contact Note

Work Phone *

Work Phone

Property Name *

Ormond Lakes HOA

Last Name *

Last Name

Personal Phone *

Personal Phone

Email *

Email

 Create Contact

Cancel



Tracking Maintenance Activities

Contact List

F7 Dashboard > Contacts

✔ Contact updated successfully

➕ Create contact

Company Contacts

🔍 View

Search for contacts

Company Name ↕	Property Name ↕	First Name ↕	Last Name ↕	Contact Note ↕	Personal Phone ↕	Work Phone ↕	Email ↕	
LemonJuice	Arbi Coast HOA	John	Doe	New worker entry	8434991086	8434696373	johndoe@example.com	🗑️
LemonJuice	Arbi Coast HOA	Alice	Smith	Maintenance check scheduled	(555) 123-4567	(555) 123-4567	alice.smith@example.com	🗑️
LemonJuice	Arbi Coast HOA	Robert	Johnson	Scheduled visit for inspection	800-555-1212	404-867-5309	rjohnson@example.com	🗑️
LemonJuice	Ormond Lakes HOA	Robert	Johnson	Scheduled visit for inspection	8434991086	8434991086	rjohnson2@example.com	🗑️

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Tracking Maintenance Activities

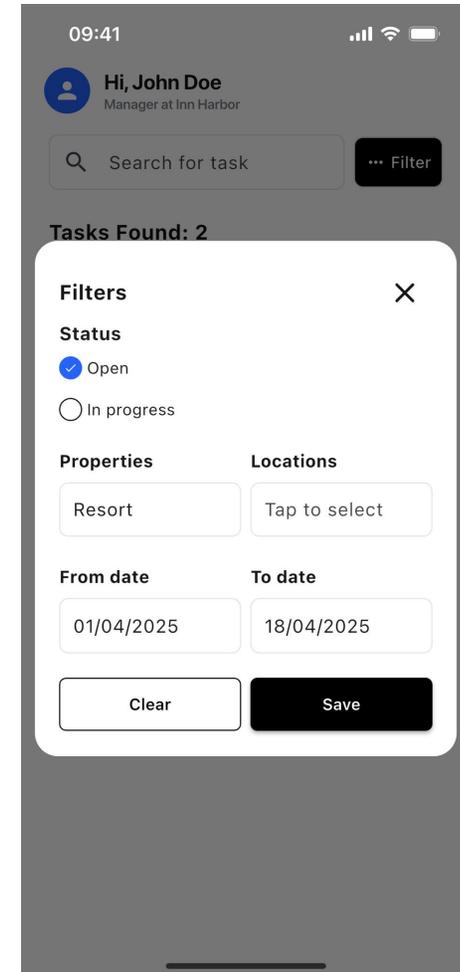
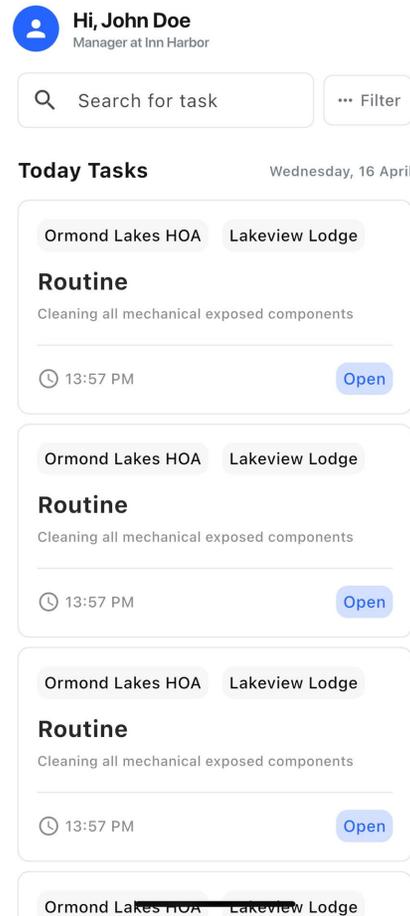
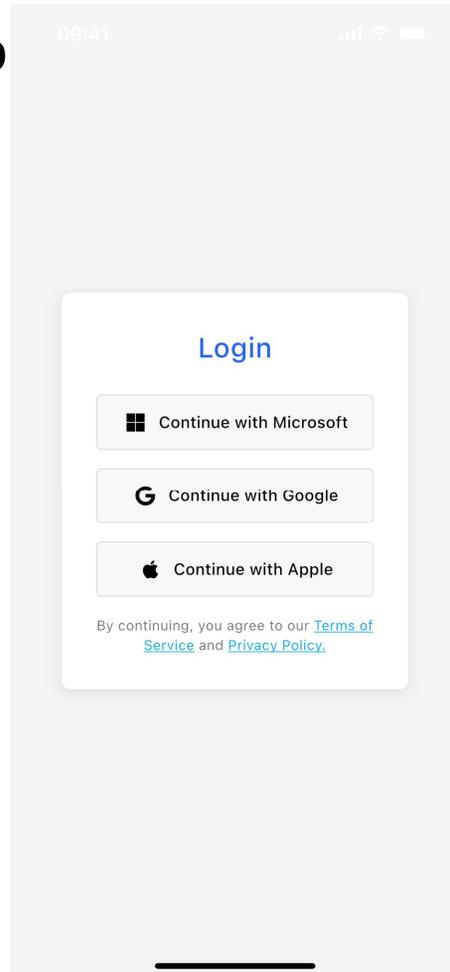
Dark Mode

The screenshot displays a web application interface in dark mode, specifically the 'Company Schedules' page. The interface includes a sidebar menu on the left, a search bar, filters, and a table of maintenance activities. The table has 12 rows of data, each representing a scheduled maintenance task. The columns are: Name, Property Name, Asset Name, Location Name, Frequency, Assignee Name, Start Date, End Date, and Est Time. The data is as follows:

Name	Property Name	Asset Name	Location Name	Frequency	Assignee Name	Start Date	End Date	Est Time
Annual	Ormond Lakes HOA	Chimney Caps	Ocean Breeze Center	Annually	Robert Johnson	Apr 15, 2025	Jul 22, 2026	2 hours
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Tracking Maintenance Activities

Phone App



Tracking Maintenance Activities

Phone App

 **Hi, John Doe**
Manager at Inn Harbor

Filter

Tasks Found: 2

Ormond Lakes HOA Lakeview Lodge

Routine
Cleaning all mechanical exposed components

13:57 PM Open

Ormond Lakes HOA Lakeview Lodge

Routine
Cleaning all mechanical exposed components

13:57 PM Open

09:41 Signal Wi-Fi Battery

< **Routine**

Ormond Lakes HOA Lakeview Lodge

Routine
Cleaning all mechanical exposed components

13:57 PM In progress

Asset Details

Name	Type
Rooftop HVAC System	HVAC 2 Ton System
Cost	Condition
\$2000.0	Good

Note
Cleaning all mechanical exposed components

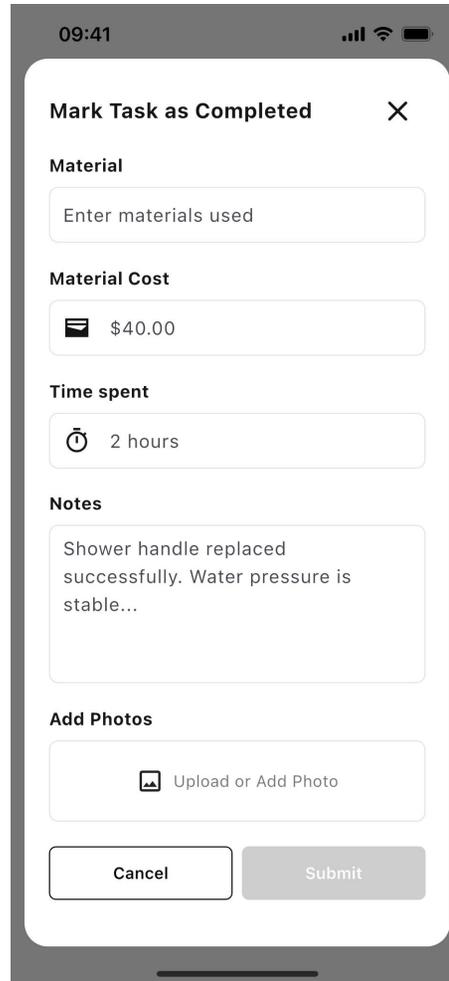
Mark Task as Completed

Task started!

Tracking Maintenance Activities

Phone App

Complete work order



09:41

Mark Task as Completed X

Material

Enter materials used

Material Cost

\$40.00

Time spent

2 hours

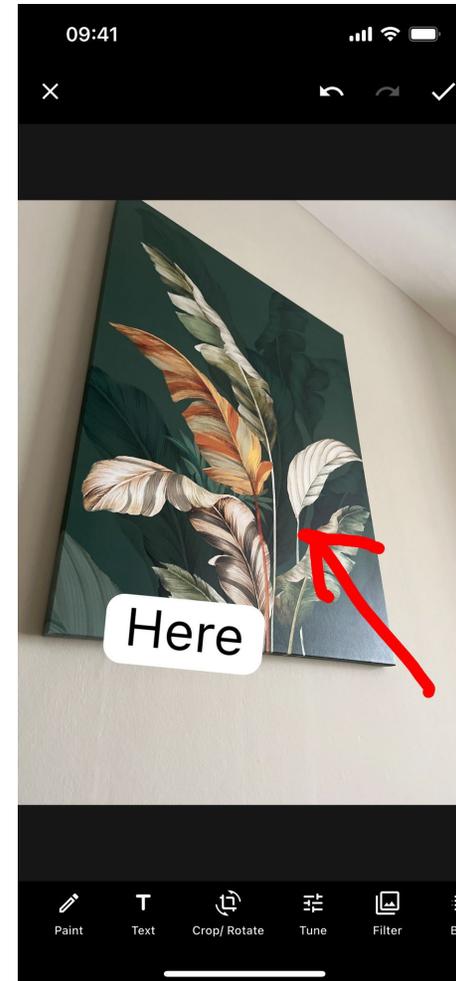
Notes

Shower handle replaced successfully. Water pressure is stable...

Add Photos

Upload or Add Photo

Cancel Submit



Tracking Maintenance Activities

The Goal

Document maintenance performed

Reduce long-term operating AND replacement costs

Tracking Maintenance Activities

Questions?

Comments?

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