CMMS PRO

Centralized Reporting & Maintenance Management System

User Manual

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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, 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.

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 three regions:

- **Left navigation rail —** a scrolling list of pages and dashboards grouped into sections. What appears here depends on your role and the modules your administrator has enabled.
- **Main content area —** the page you are currently viewing. This is where lists, detail screens, forms, and dashboards display.
- **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.

The navigation remembers your scroll position, so clicking through pages will not snap the list back to the top.

2.3 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.
Technician	Performs work orders, logs time, consumes parts, records readings.

Role	Typical use
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 before it can be closed (see 3.4).
Cancelled	Abandoned without completion.

3.2 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 — for example, by the Part 139 airfield inspection module, by preventative maintenance schedules, and by the inbound email receiver (see 3.6).

3.3 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.

3.4 Closing a work order

> **Time is required to close**
> A work order cannot be closed until at least some labor time has been logged against it. If you try to close one with no time entries, you will see: “Time must be logged before this work order can be closed.” Add a time entry first, then close.

To close a work order, open it, confirm the time is logged, then use the Close Work Order button and complete the close dialog. Closing certain work orders also triggers automatic follow-ups elsewhere in the system — for example, closing a Janitorial/QC work order on a flagged restroom marks that restroom as freshly checked (see Chapter 10).

3.5 Photos on the mobile app

When using the Android app, you can attach photos to work orders directly from your device camera or gallery, the same way you would in a browser.

3.6 Work orders from email

CMMS Pro can receive email and turn it into work order activity. 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. Messages that do not match an existing work order are handled as a fallback so nothing is lost. Your administrator configures the email address used for this.

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 by column.
- **GPS coordinates —** assets store latitude and longitude so they can appear on the Facility Map. Coordinates can be entered by hand, captured in bulk (Chapter 11), or captured live on a mobile device.

4.2 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.

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.

4.3 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.

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.

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.

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.

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.

7. 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.

7.1 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.

7.2 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.

7.3 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. Access is gated by a productivity-reconciler permission.

7.4 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.

7.5 Bulk GPS

An administrator tool for adding map coordinates to many locations and assets at once. See Chapter 11.

7.6 Import / Export

Administrators can import and export data here. This tab is always positioned at the far right of the Reports hub.

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8. People, Teams & Access Control

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

8.1 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 first), 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 9).

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.

8.2 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.

8.3 Global Permissions

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

8.4 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.

9. Billing & Seats

CMMS Pro offers two billing models. Which one applies to your organization determines what the Billing & Seats page shows.

9.1 Self-service (Stripe) accounts

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 – 9	$49
10 – 19	$39
20 or more	$29

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.

9.2 New customer sign-up

1. Pay for the desired number of seats through the Stripe payment link on the marketing site (a 30-day trial applies).
2. You are redirected to a welcome page that confirms your seats 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.

9.3 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.

10. 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.

10.1 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”) defaults to four hours and is adjustable on the Dashboard Tuning admin page, where administrators can also flag which locations count as restrooms.

10.2 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.

10.3 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.

11. Maps & GPS

11.1 The Facility Map

Assets and locations that carry GPS coordinates appear as pins on the facility map. Map layers also show airfield inspection points and incident pins where those modules are in use. Adding coordinates to a record makes it appear on the map.

11.2 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 (requires a secure connection and location permission).
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.

12. 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.

12.1 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.

12.2 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.

12.3 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.

12.4 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.

12.5 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.

12.6 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.

13. The Android App

CMMS Pro is available as an Android app in addition to the website. The app wraps the same system, so everything you do in a browser works in the app.

13.1 Installing

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.

The app supports attaching photos to work orders from your camera or gallery. Live GPS capture (Chapter 11) also works on mobile over the secure connection.

14. 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.
I cannot close a work order.	Log at least one time entry first. Closing is blocked until labor time is recorded.
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).
Reactivating a user is blocked.	The 30-day reactivation lock is active. Wait out the remaining days shown, or ask a sysop to override.
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.
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.
GPS Capture does nothing.	Grant the browser location permission and make sure you are on the secure (HTTPS) address.

14.1 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 8.4). 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.

15. 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).
Dashboard	A board of color-coded tiles giving at-a-glance status (e.g., Restrooms, HVAC).
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.
PM	Preventative Maintenance — recurring scheduled work generated automatically.
QC	Quality Check — a restroom cleaning/inspection pass.
Seat	A paid user slot on a 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 —

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