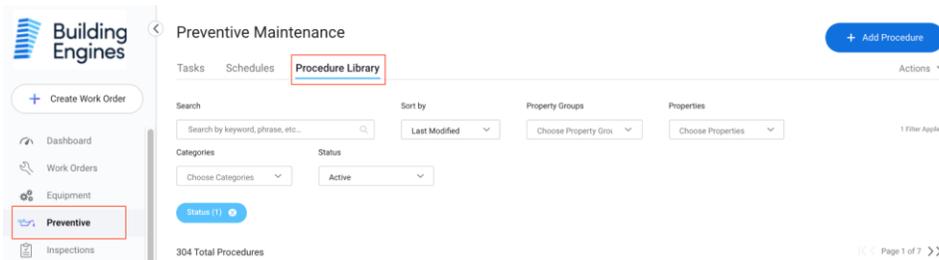
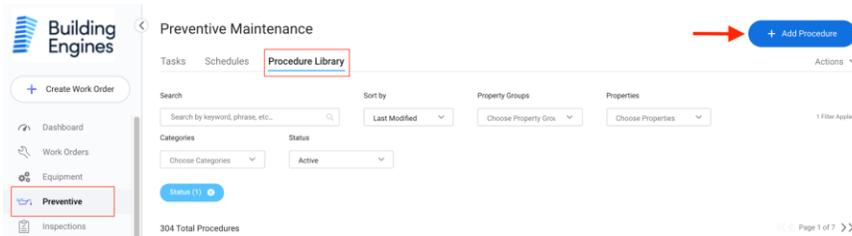


Adding and Editing Procedures

1. Click the Preventive tab and navigate to the Procedure Library feature.



2. To add a procedure, click the blue Add Procedure button in the top right corner of the page.



3. Enter the name of the new procedure. Choose a property or properties from your account and select a category for the procedure.

A screenshot of the 'Add PM Procedure' form. At the top, it says 'Draft' and 'All fields required unless marked as optional'. The form has several sections: 'Name' with a text input field; 'Properties' with a dropdown menu for 'Choose Properties' and a search bar; 'Procedure ID (Optional)' with a text input field; 'Estimated Labor (Optional)' with a text input field and a 'Hours' label; 'Notes (Optional)' with a text area; and 'Parts (Optional)' with a text area. At the bottom, there are 'Steps' and 'Files' tabs, and two buttons: 'Save Procedure' and 'Activate Procedure'.

4. You can enter a Procedure ID, estimated labor time in hours, Notes and any parts or materials needed for the task. These are all optional.

5. Click Simple Steps to enter one list of steps to perform the procedure OR Click Individual Steps to add each step to the procedure with the ability to check them off as you complete. Within Individual Steps you can create sections with their own steps

Add PM Procedure

Draft ⓘ All fields required unless marked as optional

Steps Files

Simple Steps Individual Steps

Enter steps to perform this procedure

Save Procedure

Activate Procedure

Add PM Procedure

Draft ⓘ All fields required unless marked as optional

Steps Files

Simple Steps Individual Steps

Add a Section to Get Started

+ Add Section

Save Procedure

Activate Procedure

6. To add a file to the procedure, click the Files tab next to Steps then click Add File to upload a file from your device.

Add PM Procedure

X

Draft ⓘ All fields required unless marked as optional

Notes (Optional)

Enter additional notes here

Parts (Optional)

Enter any parts, materials, or tools needed for this task

Steps

Files

+ Add File

Save Procedure

Activate Procedure

Add File

Upload File Browse Uploads

ⓘ Maximum file size is 25MB.

Upload File

Drop photos or documents to attach, or [browse](#)

Hide from Tenant

Category

Choose Category ▼

Notes (Optional)

Type additional notes or info.

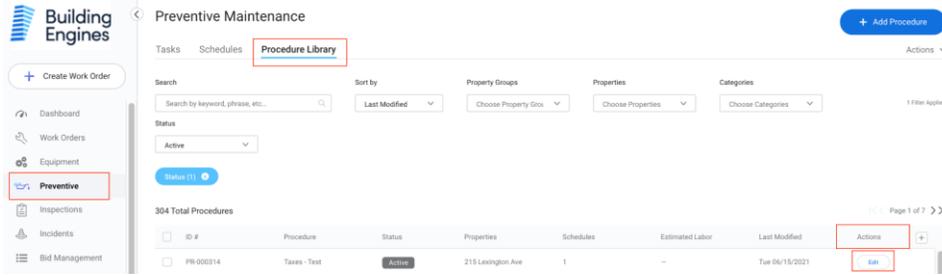
Submit

7. When all fields are complete, you can simply save the procedure without activating it by clicking the white Save Procedure button at the bottom of the page. OR you can save and activate the procedure by clicking the blue Activate Procedure button.

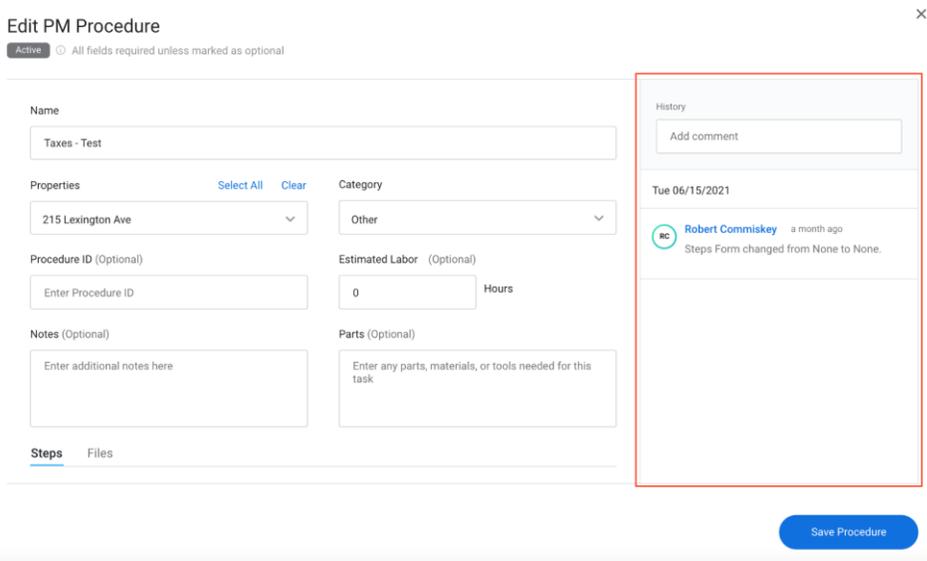
Save Procedure

Activate Procedure

8. To edit a procedure navigate to the Actions tab in the Procedures grid and click Edit on the row of the procedure you wish to edit.



9. View current information for the procedure and change fields like Name, Category, Property etc. On the right of the page, the editing history can be viewed.



10. Edit Individual Steps and Sections by clicking into the box or Add steps and sections by clicking the respective Add buttons within the steps tab. To edit Simple steps, click into the box and enter new information.

Edit PM Procedure

×

Active ⓘ All fields required unless marked as optional

Steps

Files

Simple Steps

Individual Steps



Taxes Due

1. Have you completed your taxes for property X?

Done

+ Add Step

+ Add Section

Save Procedure

Edit PM Procedure

×

Active ⓘ All fields required unless marked as optional

Steps

Files

Simple Steps

Individual Steps



Have you completed your taxes for property X?]

Save Procedure

11. Click the blue Save procedure at the bottom of the page after making any changes.

Save Procedure