

Maintenance on CoolCare.

Building maintenance and repairs information can be stored in the system quickly and easily. Once saved, the status of each job can be easily viewed and managed throughout the maintenance lifecycle, allowing you to assign jobs, set deadlines and track progress.

To access the maintenance page:

- Click **Care Home**
- Select **Maintenance**
- Click the **+Insert** button at the top of the page
- This will open the **New Maintenance Job** page; fill out the details and click the **Save** button to create the task:
 - **Title** – Name of job
 - **Type** – Repair, purchase or check
 - **Reoccurring job** – setting a job as repeating, and how often it needs to be done
 - **Due Date** – the date the job should be completed by
 - **Make & Model** – details of the appliance the job is for
 - **Describe the Job** – a more detailed description of the job to be done

New Maintenance Job

Title Required

Type Required

Repair

Purchase

Check

Reoccurring job

Due Date

Make

Model

Describe the Job

Save

Once saved, this entry will now appear on the maintenance list under the **unassigned** tab.

managing maintenance tasks.

Once the initial entry has been completed, you can select the unassigned job to edit its entry. From this page you can:

- Add an assignee to the job by selecting the pencil icon next to **Assignee:** at the top right corner
 - Maintenance assignees are controlled by your Lookups in CoolCare, please see our *Adding and Amending Lookups* guide for more information
 - If the maintenance assignee has an email address assigned, they will receive an email notification of the task they have been assigned
- Update the title, make, model, and due date of the task
 - Fill in the details in the right hand box and then click the **Update** button
- Use the **Close Job** button to complete or cancel a job
 - If the job is reoccurring, closing this job will create a new one, giving you the opportunity to amend the new due date as needed

Boiler Check #7 @ Sam's Home

Sam Reynolds:

Assignee: Harry Scott

Type: Check

Title Required

Make

Model

Due Date

maintenance filter.

When looking at the maintenance page, the **Filter** options help you manage your maintenance jobs. You can also click the **Reoccurring Jobs** button to see any jobs set as reoccurring and how often they repeat.

filter types.

- **Unassigned** – shows all maintenance items not yet assigned
- **Overdue** – shows all maintenance tasks which have exceeded the review date
- **Active** – shows all maintenance jobs currently active
- **Closed** - shows all closed jobs

Maintenance

FILTER:

Job id	Title	Type	Home	Date Created	Reoccurrence
44	Fridge PAT Test	Check	Sam's Home	11/03/2025	-

