Tumble Tracker

Staff Manual

For housing staff — properties, repairs, materials, maintenance, work orders and costs.

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1. Welcome

TumbleTracker keeps one record of every house your community looks after: who lives there, what needs fixing, what materials the job needs, which appliances are under warranty, and what it all cost. Everything is in one place, so nothing lives only in someone's truck or memory.

As **staff** you work with the houses day to day: log repairs, note materials, keep the maintenance schedule current, build work orders and record costs. This manual walks through each of those jobs.

How this manual is organised

Each chapter is one kind of job. Inside a chapter, every task is a short numbered list with a picture of the screen beside it. Button names are shown in **bold**, exactly as they appear on screen. A blue box is a tip; an amber box is a warning.

> Both manuals are online at tumbletracker.ca/manual/admin/ and tumbletracker.ca/manual/staff/. The **Download PDF** button at the top of the page saves a copy you can print or keep on a phone.

Who can do what

Every person in your community has one of three roles. The role decides what they can change, and it is shown, spelled exactly as in the table, on a badge at the bottom of the menu beside their name.

ROLE	CAN	CANNOT
Admin	Everything below, plus invite and remove users, change roles, delete a property, change the community name	—
Staff (Full)	Add and edit properties, tenants, photos, repairs, materials, appliances, maintenance, work orders and costs; import data; print reports	Delete a property, manage users or account settings
Staff (Read Only)	See every screen and print every report	Add, edit, delete or import anything

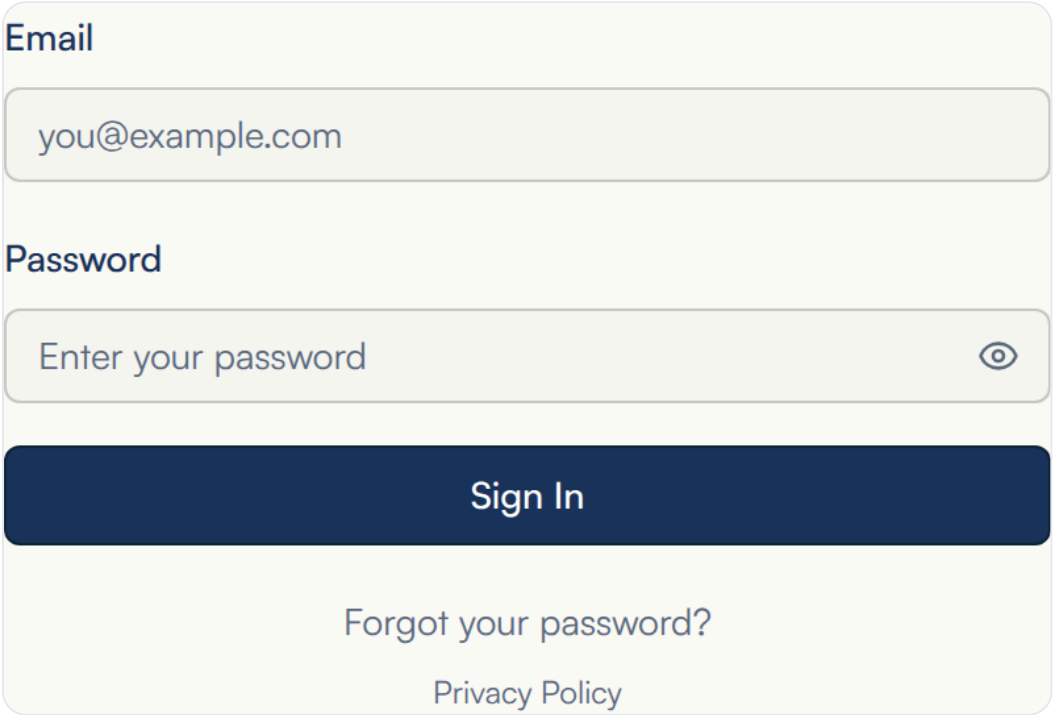
Need help? Email support@tumbletracker.ca.

2. Signing in

Accepting your invitation

You do not create your own TumbleTracker account. You are invited by email, and the invitation is what sets your password the first time.

1. Open the email titled **You've been invited to TumbleTracker** and click **Accept Invitation**. The link works for 10 days; if yours has expired, ask your administrator to invite you again.
2. Type your name in **Your Name**, then a password of at least 12 characters in **Password**, and the same password again in **Confirm Password**.
3. Click **Activate Account**. TumbleTracker confirms the account is active and shows a **Sign In** button — click it to sign in for the first time.



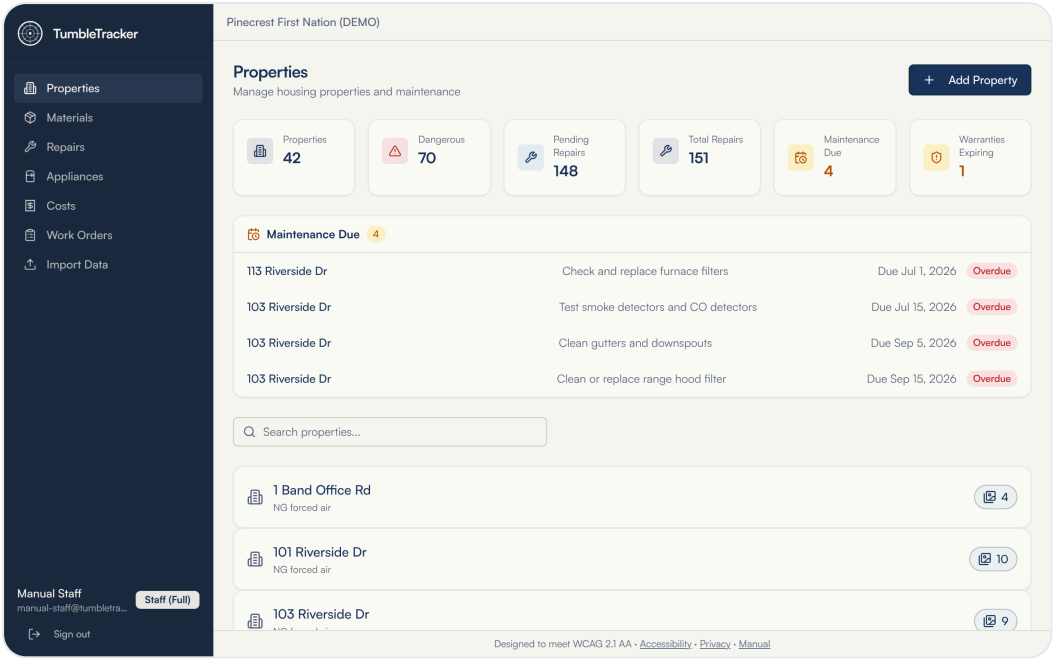
Once your account is active you sign in here.

> An invitation link works once. After you have activated your account, sign in with your email and password instead — the link in the email will not work again.

Signing in

1. Go to **tumbletracker.ca** and click **Sign In**.
2. Enter your email address and your password.

3. Click **Sign In**. You land on **Properties**, which lists every house in your community.



The Properties screen, the first screen after signing in.

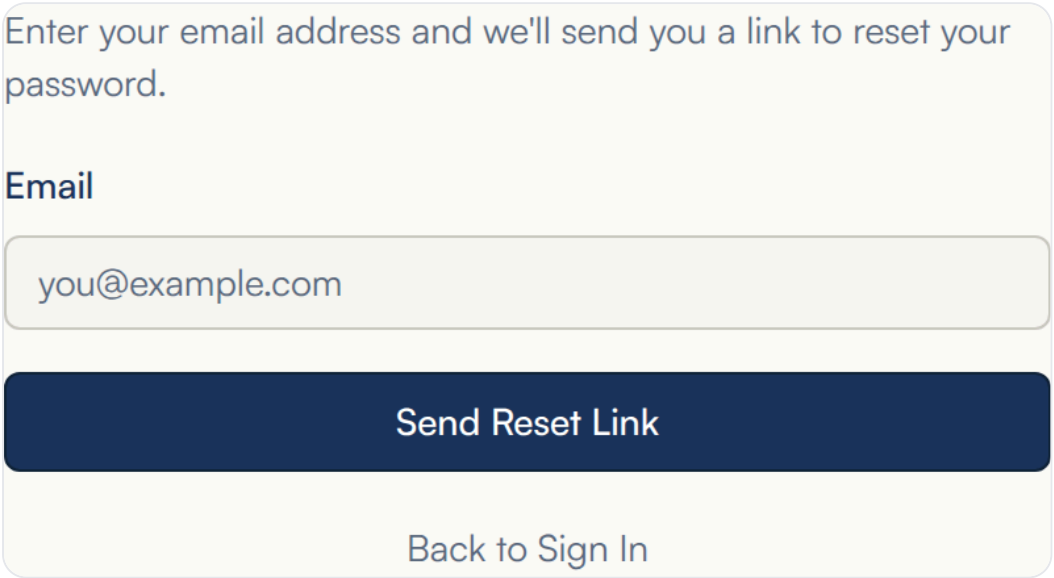
If you cannot sign in

When the sign-in does not go through, a red line under the form says why:

THE MESSAGE	WHAT IT MEANS
Incorrect email or password.	Check both and try again. TumbleTracker does not say which one is wrong. If you have forgotten your password, reset it (below).
Your account is not active. Ask your administrator, or write to support@tumbletracker.ca for help.	Your login has been suspended, or your invitation has not been accepted yet.
Your community's account is suspended. Write to support@tumbletracker.ca for help.	The whole community is paused, not only you.
Your demo has ended. Write to support@tumbletracker.ca to keep using TumbleTracker.	A trial community has reached its end date.
Too many attempts. Please wait a few minutes and try again.	Several tries in a row were refused. Wait, then try once more carefully.

If you forget your password

1. On the sign-in screen click **Forgot your password?**
2. Enter your email address and click **Send Reset Link**. TumbleTracker emails you a link that works for one hour.
3. Open the email and click **Reset Password**. Type a new password of at least 12 characters in **New Password**, repeat it in **Confirm Password**, and click **Reset Password**.
4. Click **Sign In** and sign in with your new password.

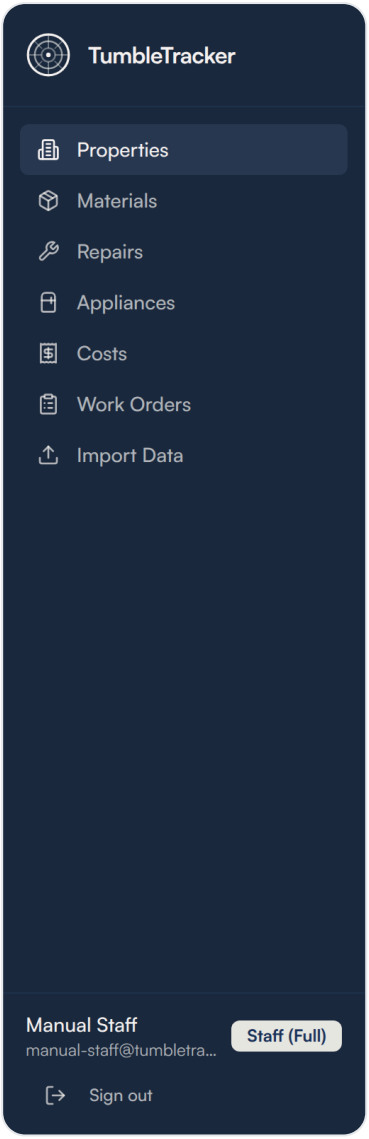


Asking for a reset link.

> A longer password is a safer password. A short phrase you will remember works better than a short word with numbers on the end.

Finding your way around

1. The menu on the left lists the main screens: **Properties**, **Materials**, **Repairs**, **Appliances**, **Costs**, **Work Orders** and **Import Data**.
2. Your name and your role badge are at the bottom of the menu. **Admin**, **Staff (Full)** or **Staff (Read Only)** tells you what you can change.
3. Click **Sign out** when you are done on a shared computer.



The menu, with the role badge at the bottom.

> On a phone the menu is behind the ☰ button at the top left.

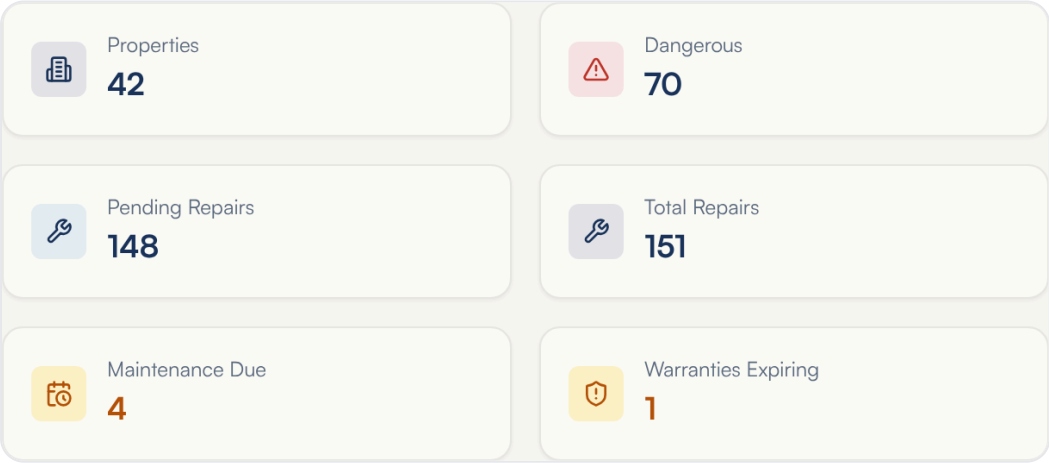
Where to find it: tumbletracker.ca → **Sign In**.

3. Your properties

Every house your community looks after is one property in TumbleTracker. The property is where everything else hangs: its repairs, its materials, its appliances, its photos, its costs and the people who live in it. **Properties** is the screen you land on when you sign in.

Reading the Properties screen

1. Six cards across the top count the whole community. **Properties** is how many houses are on your list.
2. **Dangerous** counts repair items ticked as dangerous that are not yet Completed — finishing the work takes an item off this card. **Pending Repairs** counts repairs still marked Pending; **Total Repairs** counts every repair ever logged, finished or not. Click any of the three and the **Repairs** screen opens already filtered to those items.
3. **Maintenance Due** counts scheduled tasks that are overdue or due in the next 14 days. The list under the cards names them; click a line to open that house's maintenance schedule. When nothing is due the strip reads ✓ **All maintenance on track**.
4. **Warranties Expiring** counts appliances whose warranty runs out within 90 days. Click it to open the **Appliances** screen showing just those.
5. Below that, **Search properties...** filters the list by address as you type, and each house shows its heating type, a **Wood Stove** badge if it has one, and — on the right — how many photos it has.

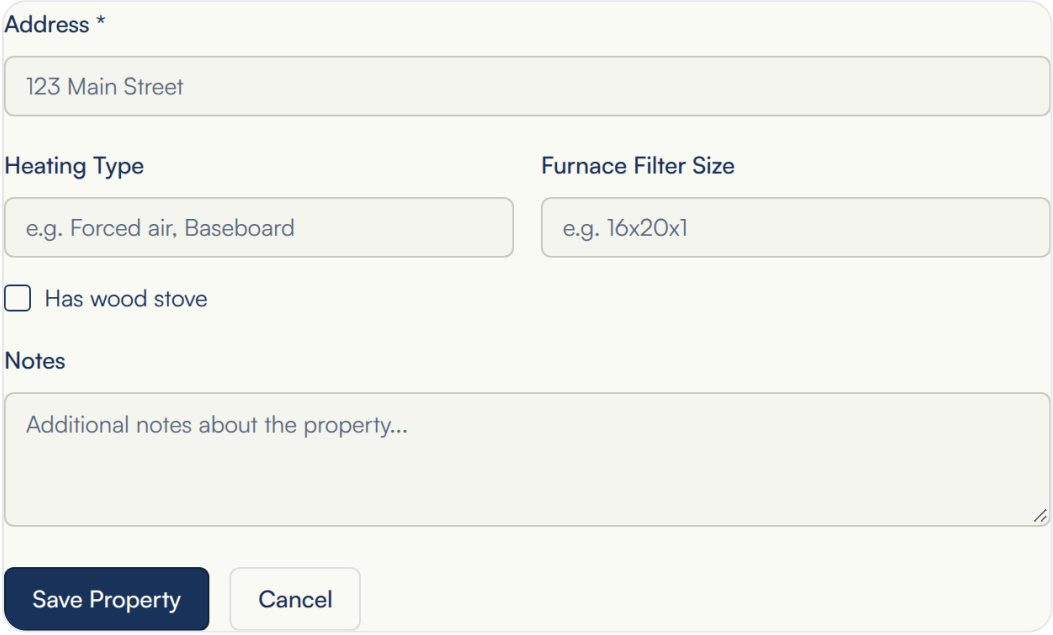


The six cards count the whole community, not one house. Four of them open a list.

> The photo count on the right of a house is a button. Click it to open that house straight at its photo gallery instead of scrolling down to it.

Adding a property

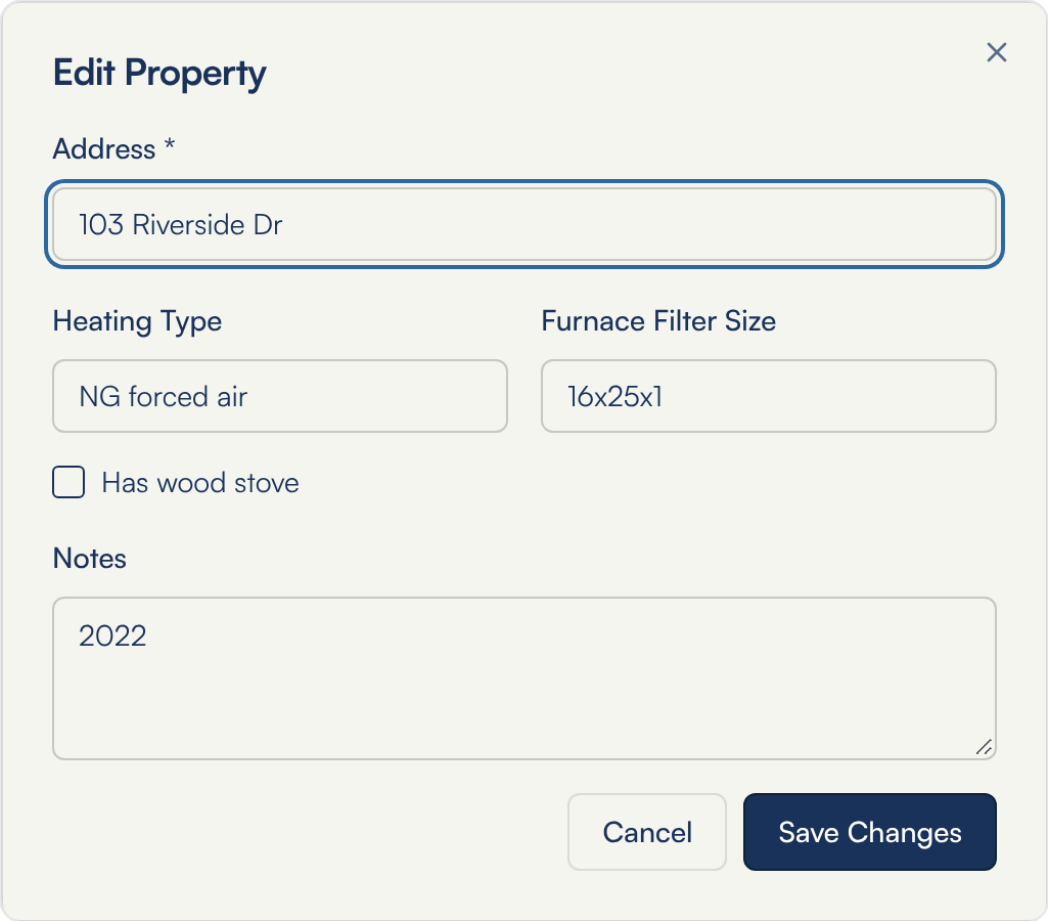
1. On **Properties**, click **Add Property** at the top right.
2. Type the street address in **Address**. It is the only thing TumbleTracker insists on, and it is how the house is named on every other screen and report. Each house needs its own address: if another house in your community already has it, TumbleTracker says *A house with this address already exists in this community.* and saves nothing.
3. Fill in **Heating Type** (for example *NG forced air*) and **Furnace Filter Size** (for example *16x25x1*) if you know them. Tick **Has wood stove** if there is one.
4. Add anything else worth knowing in **Notes**. It shows in a box just under the address.
5. Click **Save Property**. TumbleTracker opens the new house's page, ready for its repairs and photos.



Only the address is required.

Editing a property

1. Open the house and click **Edit** in the row of buttons beside the address.
2. The **Edit Property** window opens with the five details already filled in: **Address**, **Heating Type**, **Furnace Filter Size**, **Has wood stove** and **Notes**. Change what needs changing.
3. Click **Save Changes**. The heading and the notes box update at once; **Cancel** keeps what was there. Everything else recorded against the house — repairs, photos, costs — stays exactly as it was. An address another house already has is refused with the same sentence as when adding a house.

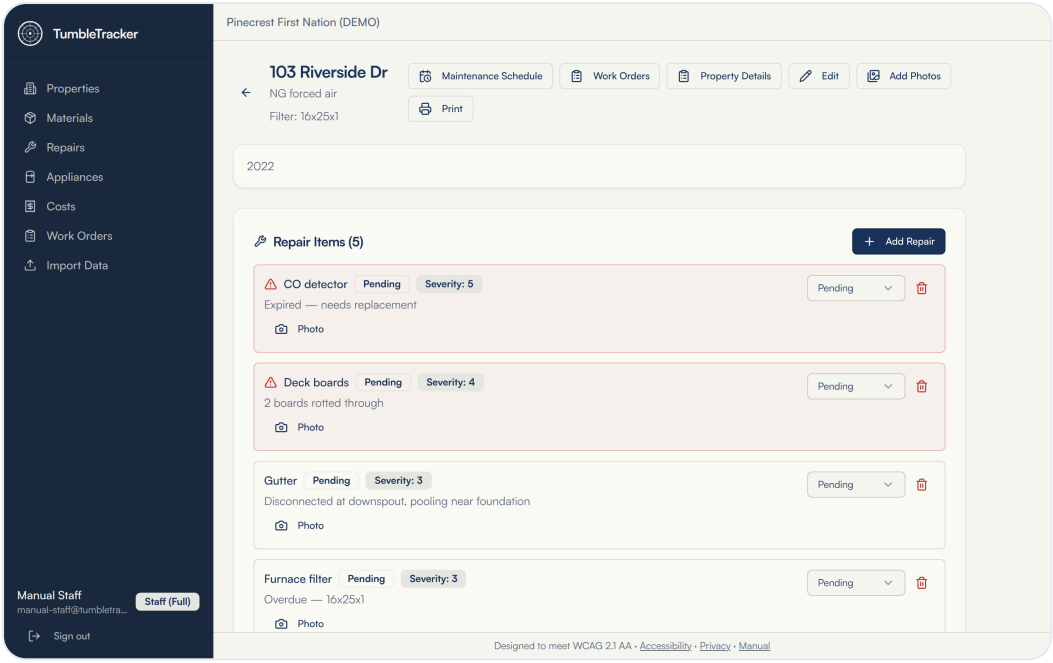


The same five details as when the house was added.

> The address is how the house is named on every report and in every import, so if you correct it, tell whoever keeps the spreadsheets.

Opening a property

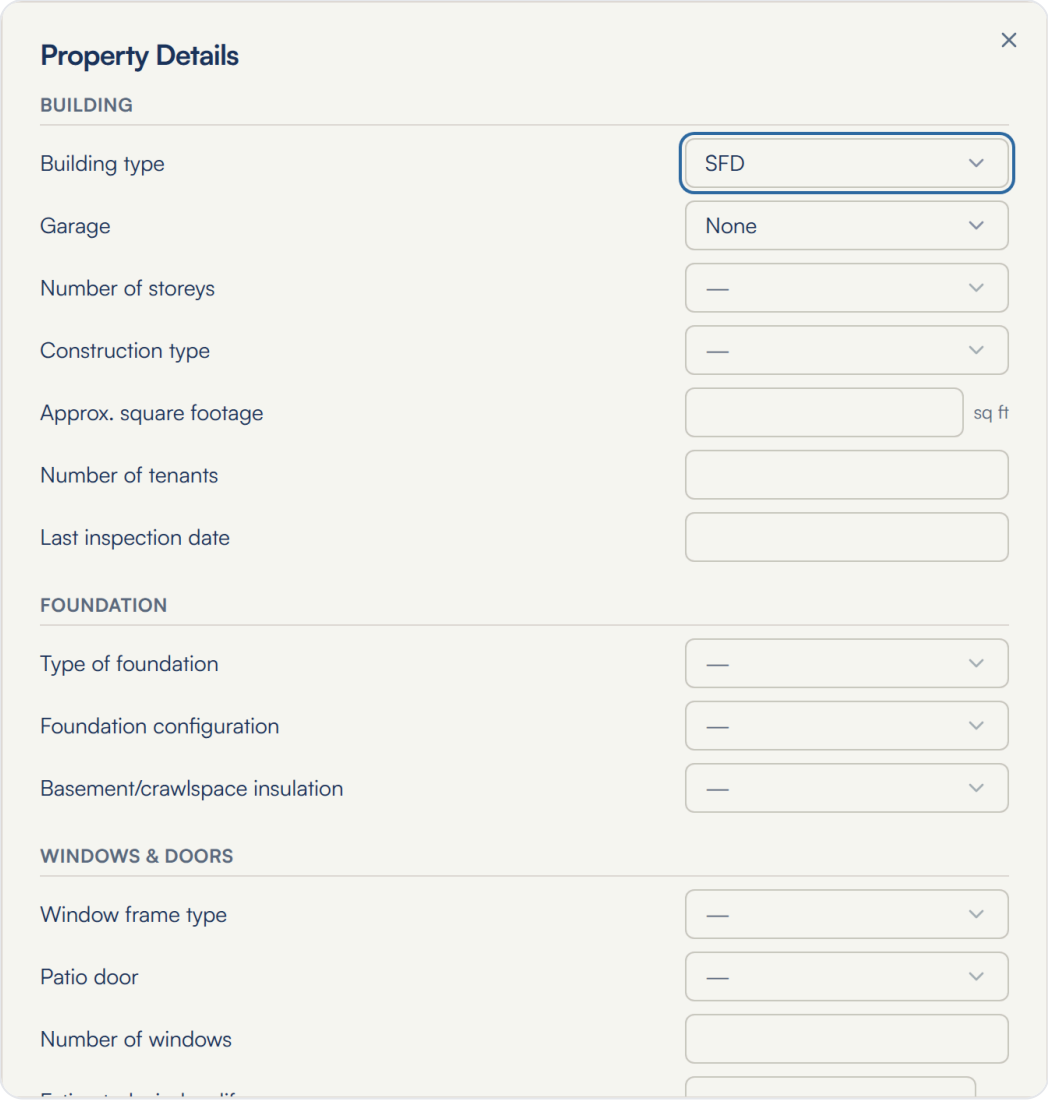
1. On **Properties**, click the house. Its address is the heading, with the heating type and filter size under it.
2. The row of buttons beside the address opens the rest of the house: **Maintenance Schedule**, **Work Orders**, **Property Details**, **Edit**, **Add Photos** and **Print**.
3. Down the page come the sections, each one a card with its own count: **Repair Items**, **Materials**, **Appliances**, **Costs**, **Photos** and **Tenants / Residents**. Each has its own chapter in this manual.
4. The back arrow beside the address returns you to **Properties**.



The top of a house's page, with its buttons and the first section.

The building record

1. On the house's page, click **Property Details**. This is the building's own record — what it is made of, not what is wrong with it. The window reads what is saved first; for a moment it may say *Loading the saved details...* before the sections appear.
2. Work down the eight sections: **Building**, **Foundation**, **Windows & Doors**, **Exterior / Walls**, **Roof**, **Water & Plumbing**, **Interior**, and **Heating, Ventilation & Safety**.
3. Each row is a dropdown, a number, or Yes / No; **Last inspection date** is a plain text box, so a date written any way (*March 6, 2025*) can be kept as it is. **Flooring present** and **Type of heating** let you tick more than one answer. A dropdown also shows a value already on file that is not one of its choices, so nothing recorded earlier is hidden.
4. Click **Save**. **Cancel** closes the window and keeps what was there before.
5. If the saved details cannot be read, the window says so and offers no **Save** — close it and try again in a moment. If someone else saved this house's details while you had the window open, your save is refused with *These details were changed after you opened them, so nothing was saved.* Close the window, open it again to see their changes, and make yours.



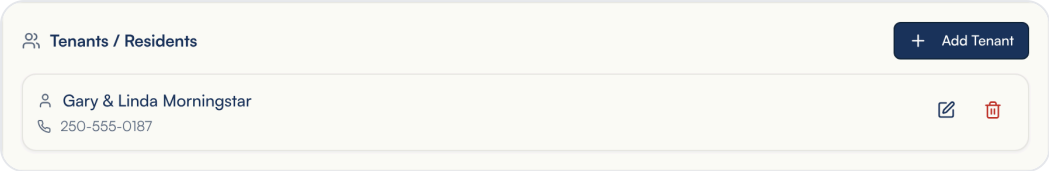
Fill in what you know; the window scrolls through all eight sections.

> A row you leave blank is skipped everywhere — on the screen and on the printed report. Filling in half of it is still worth doing. The water heater's type and install year are under **Water & Plumbing**; the window frame type is under **Windows & Doors**; the furnace install year is under **Heating, Ventilation & Safety**.

Tenants

1. Scroll to **Tenants / Residents** at the bottom of the house's page and click **Add Tenant**.
2. Type the **Name** — the only thing required — then **Phone**, **Email** and **Notes** if you have them.
3. Click **Add Tenant**. The person appears on a card with their phone and email under the name.

4. To change something, click the pencil on their card, edit, and click **Update**. To take someone off, click the red bin, then **Delete** when TumbleTracker asks **Remove this tenant?**



A house can have more than one tenant card.

> Tenant phone numbers are the fastest way to arrange access before a crew drives out. Keep them current.

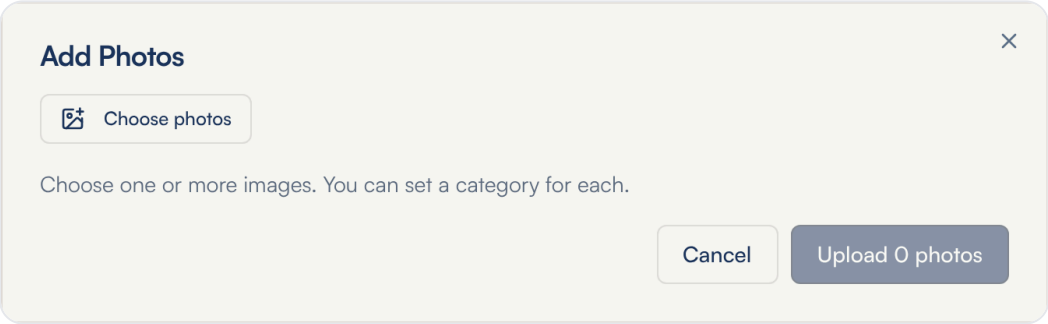
Where to find it: Properties in the menu → a house. New houses: **Properties** → **Add Property**.

4. Photos

A photo settles an argument that a paragraph cannot. TumbleTracker keeps photos in two places: on the house, sorted into categories, and on a single repair item (that one is in the **Repairs** chapter). This chapter is the house gallery.

Adding photos

1. Open the house and click **Add Photos** — either the button beside the address or the one on the **Photos** card. Both open the same window.
2. Click **Choose photos** and pick one or more pictures. Any image file is accepted, up to 20 MB each.
3. Each picture you chose gets a row with a **Category** dropdown and a box for an optional caption. If you chose several, **Set all to:** gives them all the same category in one go. The bin on a row drops that picture before anything is sent.
4. Click **Upload**. The button counts what it is about to send — **Upload 3 photos** — and tells you how far it has got while it works.



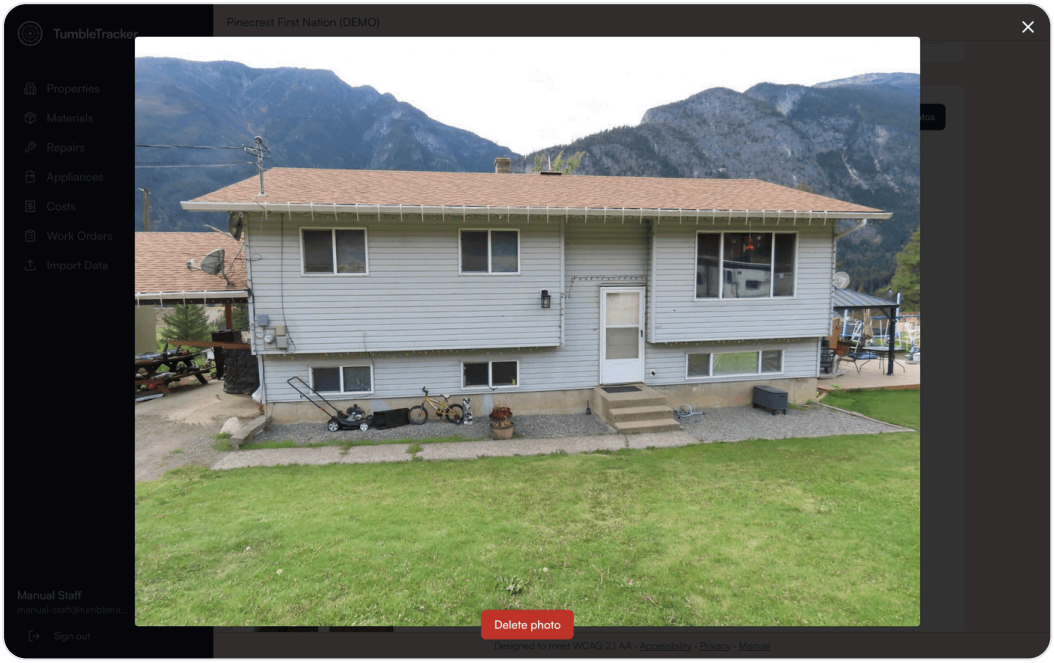
The window before any picture has been chosen.

> The fifteen categories are Front of House, Roof, Windows and Doors, Decks and Steps, Foundation, Exterior, Interior, Appliances, Flooring, Cabinetry, Electrical, Plumbing, Mechanical (HVAC/furnace), Yard/Site and General/Other. A photo you do not categorise lands in General/Other.

> Photos straight off a phone are fine. TumbleTracker shrinks each one in your browser before it is sent — which matters on a cellular connection in a truck — and stores it at no more than 1920 pixels on its longest side.

Opening a photo full size

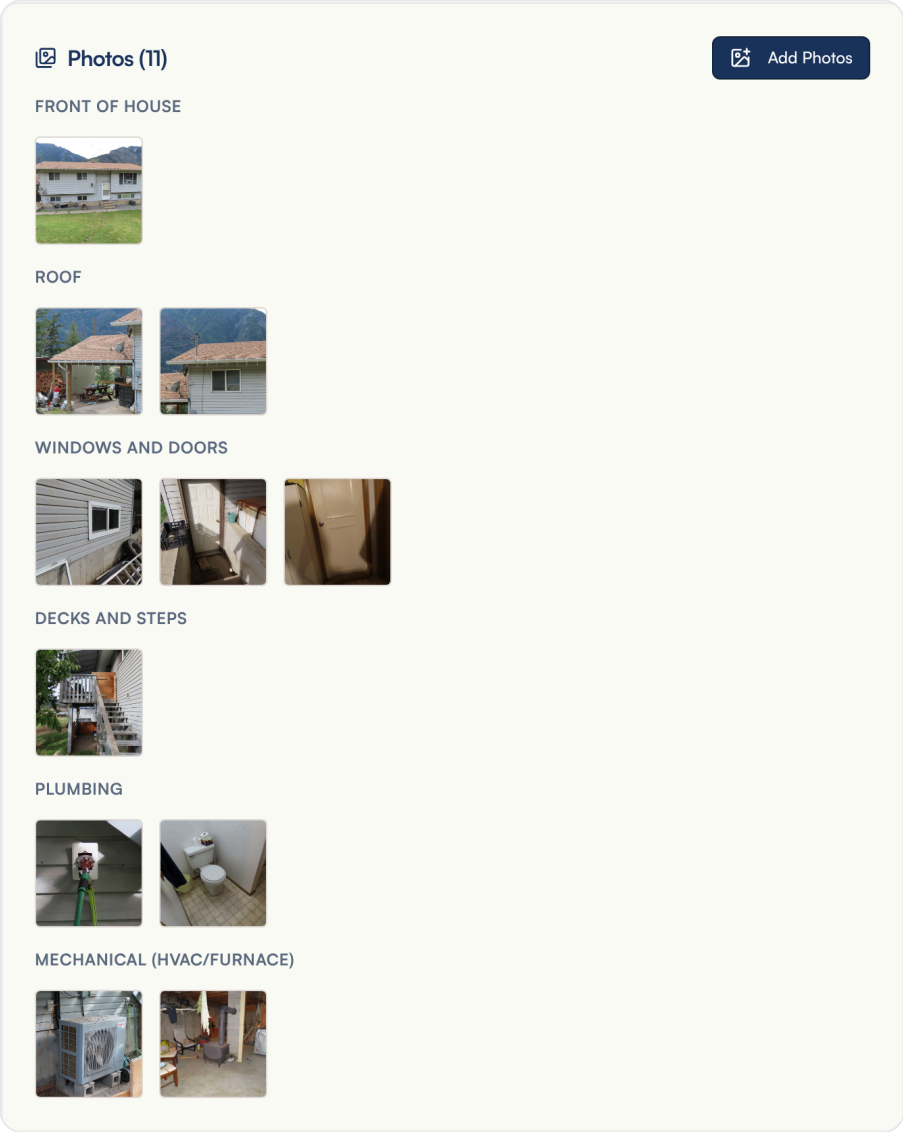
1. On the house's page, scroll to **Photos**. The gallery is grouped under the category headings, in the order above.
2. Click any thumbnail. The picture fills the screen over a dark background.
3. Close it with the **×** at the top right, by pressing **Esc**, or by clicking the dark background.



The full-size viewer. Esc closes it; **Delete photo** is here, not on the thumbnails.

Removing a photo

1. In the **Photos** gallery, click (or tap) the photo you want gone. It opens full size. The thumbnails themselves carry no delete button, so a slip of the finger in the gallery never starts a delete.
2. Below the picture, click the red **Delete photo** button. With a keyboard, **Tab** reaches it; a screen reader announces it as *Delete photo* followed by the photo's caption, or its file name when it has no caption. A read-only user does not see it.
3. TumbleTracker asks **Delete this photo?** Click **Delete** to remove it, or **Cancel** to keep it. Nothing is deleted until you click **Delete**.
4. If the delete cannot be done, a red **Delete failed** message says why and the gallery is read again — a photo someone else has already removed simply disappears.



Eleven photos on one house, grouped by category. Open a photo to delete it.

> Deleting a photo cannot be undone, and the count on the **Properties** list drops by one. If you are not sure, leave it — old photos cost nothing and prove what a house looked like on a given day.

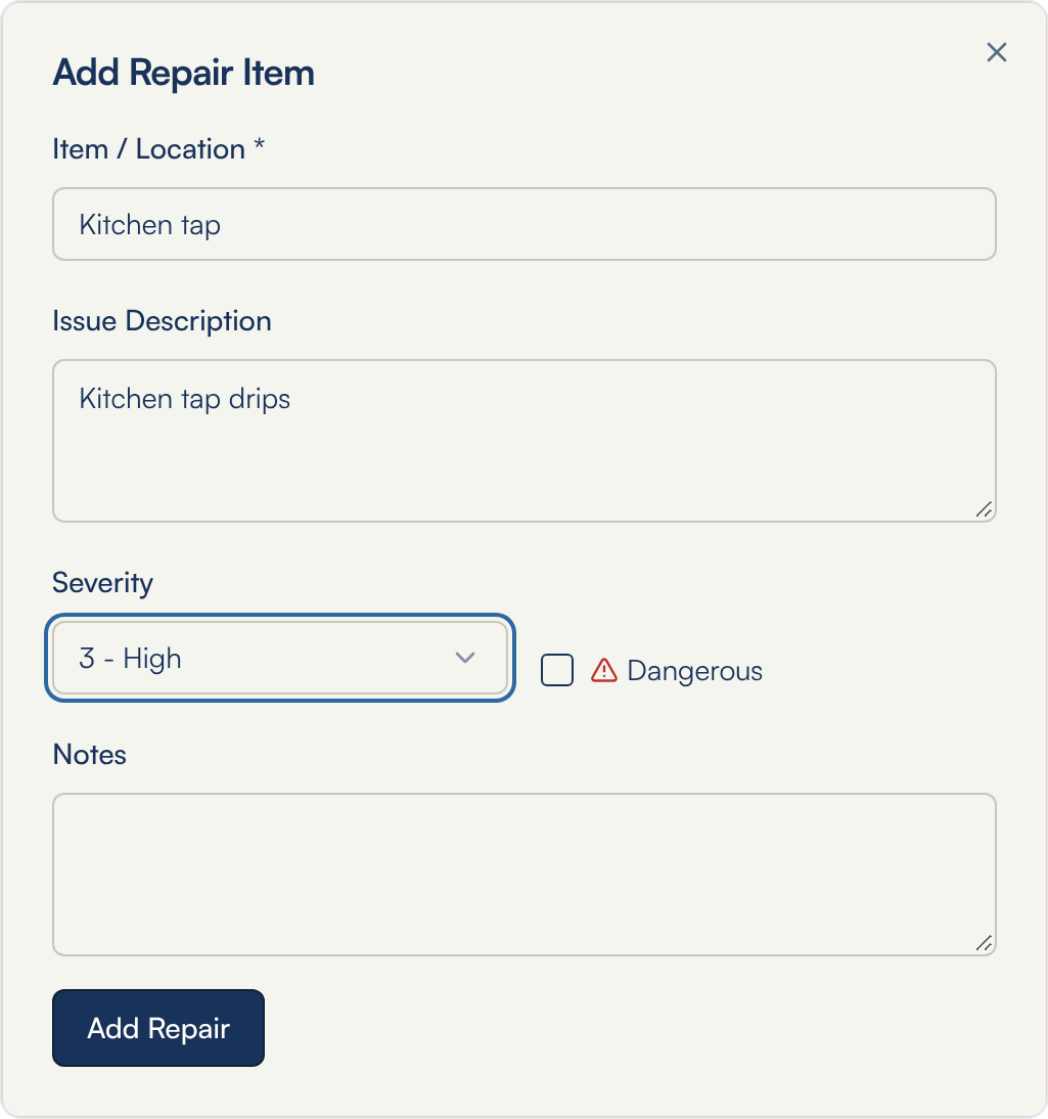
Where to find it: Properties → a house → **Photos**, or **Add Photos** beside the address.

5. Repairs

A repair item is one thing wrong with one house. It is logged once, it carries a severity and a status, and it stays on the house until someone marks it done. The counts on **Properties** are built from these items, so a repair that is never logged is a repair nobody can see.

Logging a repair

1. Open the house and click **Add Repair** on the **Repair Items** card.
2. Fill in **Item / Location** — what and where, such as *Kitchen sink* or *Front door*. It is the only field TumbleTracker insists on.
3. Describe what is wrong in **Issue Description**, and pick a **Severity**. New items start at **1 - Low**.
4. Tick **Dangerous** if the fault could hurt someone. Add anything else in **Notes**.
5. Click **Add Repair**. The item is added to **Repair Items** marked **Pending** — TumbleTracker sorts the list by **Dangerous** first and **Severity** next, so a new item lands wherever its flag and severity put it, not necessarily at the top. The **×** at the top right (or **Esc**) closes the window without saving anything.



Severity and Dangerous are two separate judgements.

Severity, and what Dangerous does

Severity is how bad the fault is. It sorts your work; it does not change anything else in TumbleTracker.

SEVERITY	USE IT FOR
1 - Low	Cosmetic, or it can wait for the next visit
2 - Medium	Should be fixed, but the house is fine meanwhile
3 - High	Getting worse, or the tenant is without something they need
4 - Urgent	Book it now — damage is spreading
5 - Critical	The house is not fit to live in until this is done

From **3 - High** upward the item carries a **Severity: 3** badge on its row, so the bad ones stand out in a long list.

Dangerous is a separate tick, and it is the one that shows on the front screen. A dangerous item gets a red warning triangle, its row is tinted red, and it is counted on the **Dangerous** card on **Properties**.

> The **Dangerous** card counts flagged items that are not yet **Completed**. Marking the work Completed takes the item off the card; the tick itself stays on the row as a record. Click the card to see every open dangerous item in the community at once.

Moving a repair along

1. Find the item on the house's **Repair Items** card. The dropdown on the right of the row is its status.
2. Change it to **In Progress** when the work starts, and **Completed** when it is done. **Deferred** is for work you have decided to put off: it stays open — it can still go on a work order, and a dangerous deferred item stays on the **Dangerous** card. There is no Save button — the change is stored the moment you pick it, and TumbleTracker records the date you marked it Completed. Moving a Completed item back to another status clears that date.
3. The counts on **Properties** follow along: **Pending Repairs** drops as soon as an item leaves Pending, while **Total Repairs** stays the same.
4. To remove an item entirely, click the red bin beside the dropdown and confirm with **Delete**.

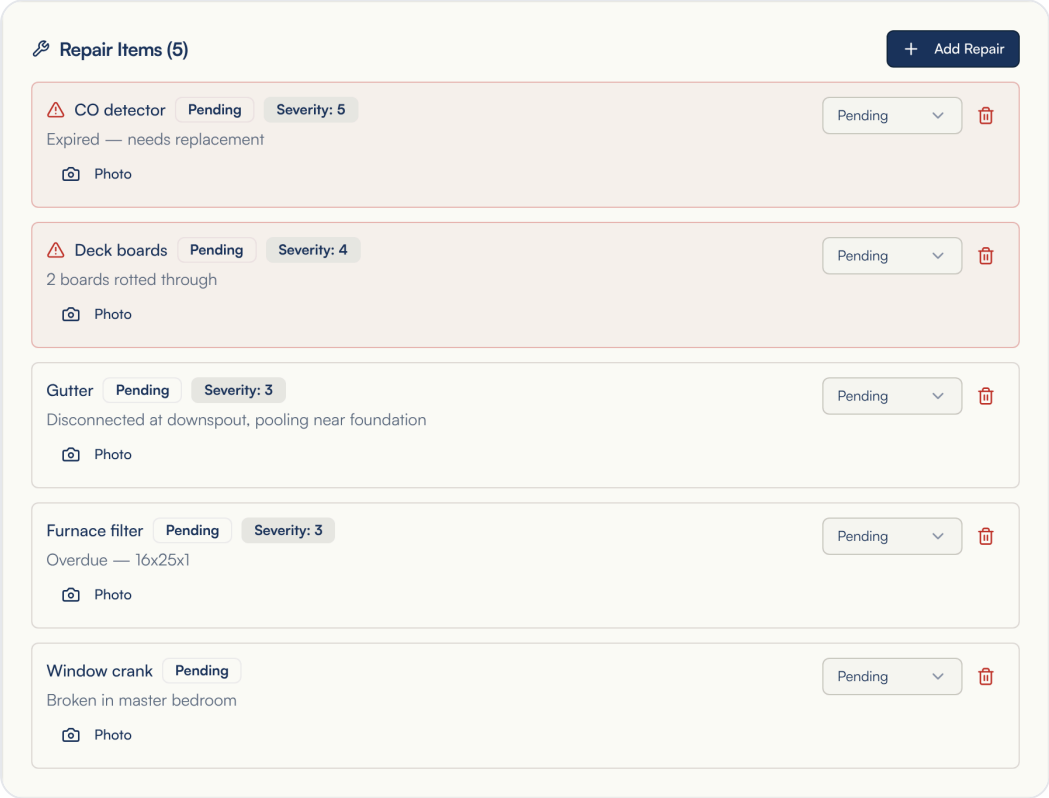
The status dropdown sits on the right of every repair row.

> Deleting a repair takes its photos and its history with it, and cannot be undone. If the work is finished, mark it **Completed** rather than deleting it — the record is worth keeping.

Attaching photos to a repair

1. Under the repair's description, click **Photo**.
2. Pick one image. It is sent as soon as you choose it — there is no separate upload step — and appears as a thumbnail under that repair. Repeat for more.

3. Click a thumbnail to see it full size; **Esc** closes it.
4. To remove one, open it full size, click the red **Delete photo** button below the picture and confirm with **Delete**. If a photo cannot be added or removed, a red message says why.

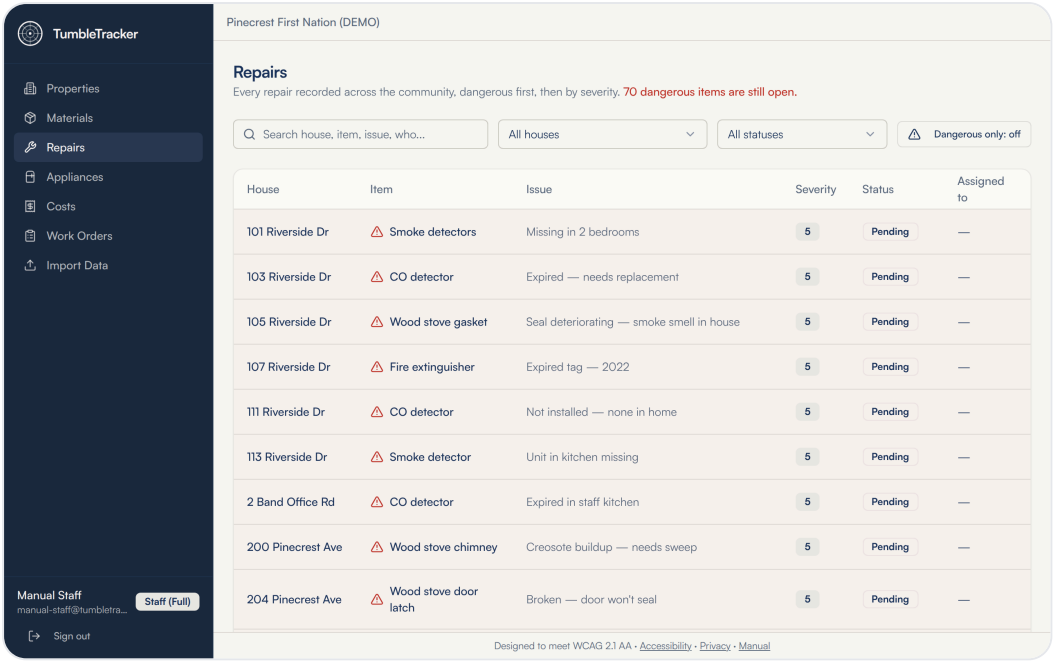


Each repair has its own **Photo** button.

> A repair photo belongs to the repair, not to the house gallery in the **Photos** chapter. Shoot the fault here; shoot the house there.

Every repair in the community

1. Click **Repairs** in the menu. Every repair item across all of your houses is listed, with the house it belongs to, dangerous items first and then by severity.
2. Narrow the list with the search box, the house dropdown, the status dropdown (**Open** is everything not yet Completed) and the **Dangerous only** button.
3. The three repair cards on **Properties** open this same screen with the matching filter already set. Click a house name in the list to open that house — status changes and edits are made there, on the house's own **Repair Items** card.



One list for the whole community; the house name is a link.

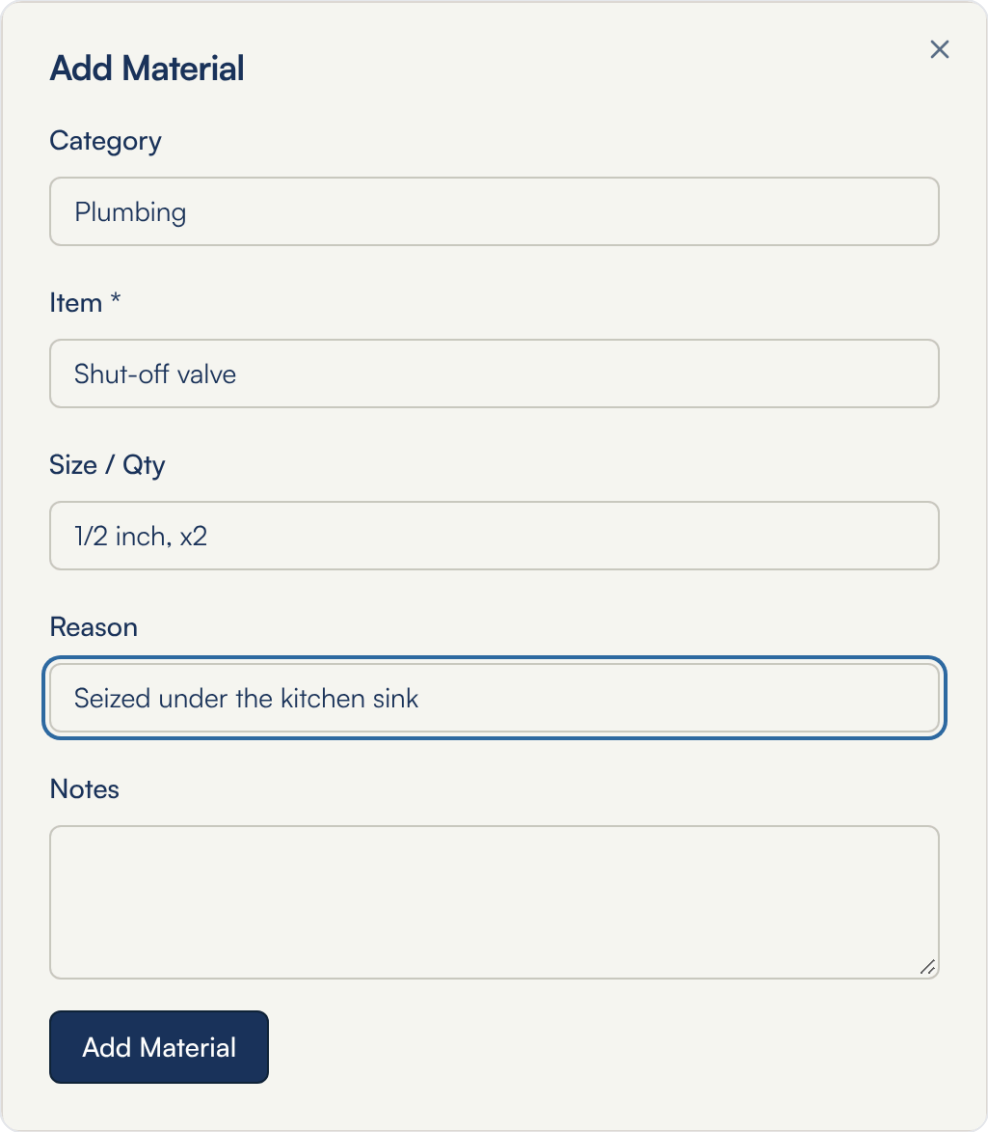
Where to find it: Properties → a house → **Repair Items**, or **Repairs** in the menu.

6. Materials

Materials is the list of what each house needs bought. You record it on the house while you are standing in it, and TumbleTracker adds it up across the whole community so one person can do one supply run instead of five.

Recording what a house needs

1. Open the house and click **Add Material** on the **Materials** card.
2. Put the kind of thing in **Category** — *Plumbing*, *Electrical*, *Furnace Filter*. This is what the community list groups by, so use the same wording every time.
3. Name the thing itself in **Item**. It is the only field TumbleTracker insists on.
4. Put either a size or a count in **Size / Qty** — *16x25x1* for a filter, *10* for ten outlet covers.
5. Say why in **Reason**, add anything else in **Notes**, and click **Add Material**. The **×** at the top right (or **Esc**) closes the window without saving.



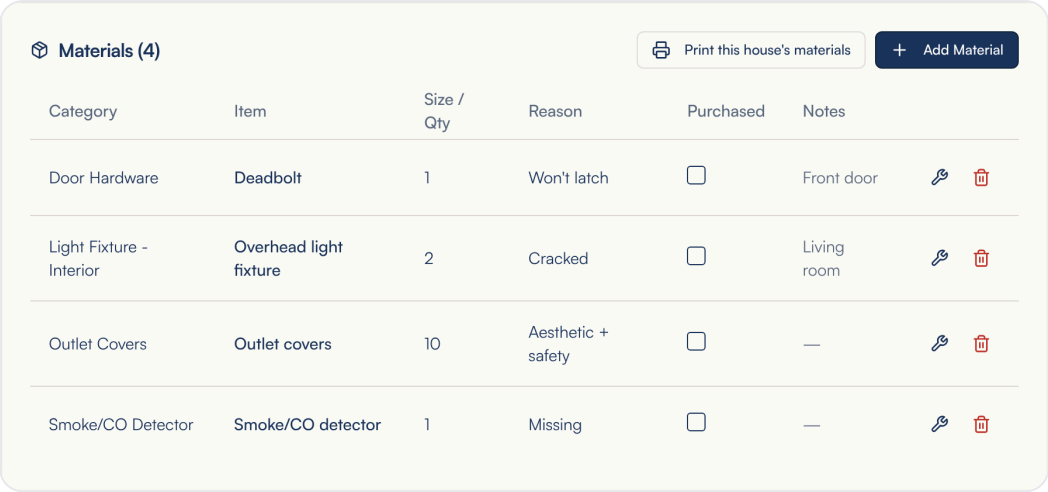
Category groups it; Item names it; Size / Qty counts it.

> **Size / Qty** is read two ways. Something shaped like a size — *16x25x1* — counts as one item of that size. A plain number — *10* — counts as ten. Anything vague, like *several*, counts as one and is flagged on the community list as *qty not specified, counted as 1*.

Marking a material purchased

1. Open the house's **Materials** card. Each row shows **Category**, **Item**, **Size / Qty**, **Reason**, **Purchased** and **Notes**.
2. Tick the box in the **Purchased** column once the thing has been bought. It is saved the moment you tick it. Untick it to put the item back on the outstanding list.
3. To correct a row, click the wrench, change what is wrong, and click **Save Changes**.

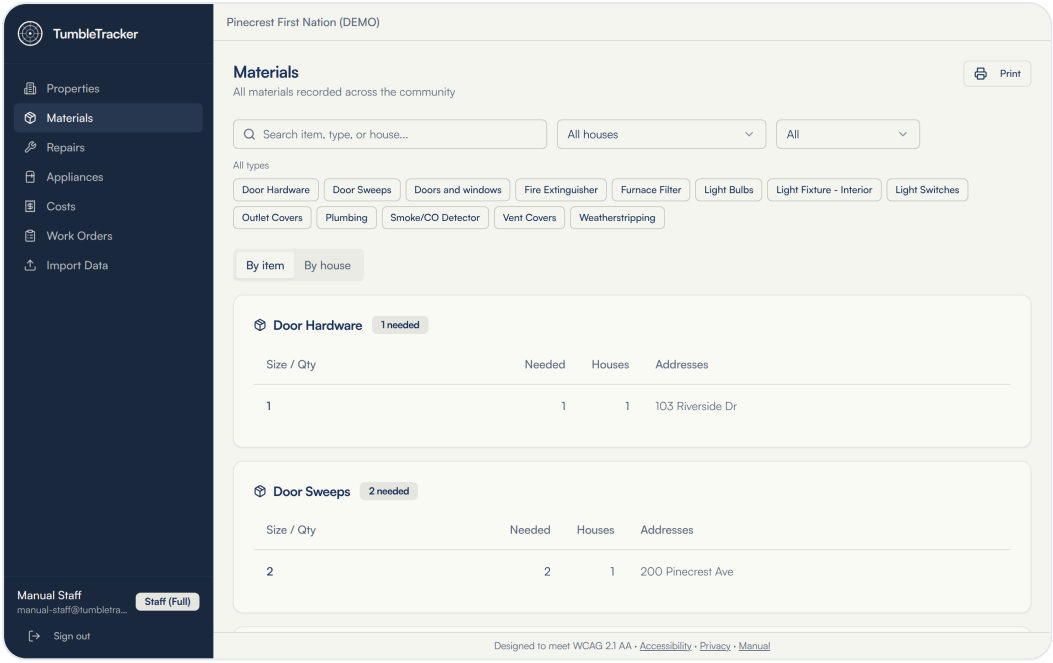
4. To drop a row, click the red bin and confirm with **Delete** when TumbleTracker asks **Delete this material?**



Four materials on one house, none of them bought yet.

The community materials list

1. Click **Materials** in the menu. This is every material from every house in one place.
2. Narrow it with the three controls at the top: **Search item, type, or house...**, the **All houses** dropdown, and the purchase filter — **All**, **Outstanding** or **Purchased**. The chips under them switch single item types on and off.
3. **By item** groups everything by kind, with a **needed** count on each heading and a table of the sizes, how many of each, and which houses they are for. This is your shopping list.
4. **By house** groups the same rows by address instead — what to drop off where, once the shopping is done.

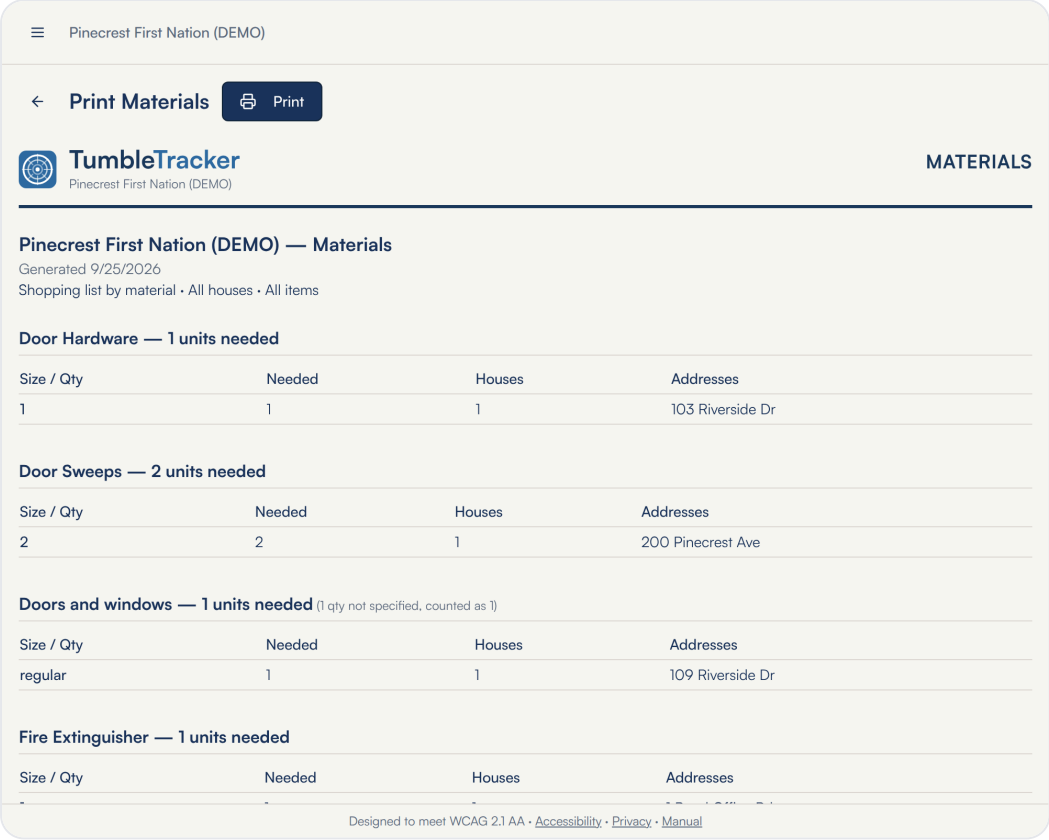


The community list, on the **By item** tab.

> Rows are grouped by their **Category**. A row with no category is grouped under its item name instead, so two spellings of the same thing become two groups. Consistency in that one field is what makes the shopping list add up.

Printing a materials sheet

1. For one house: open it and click **Print this house's materials** on the **Materials** card.
2. For the whole community: go to **Materials**, set the filters you want, and click **Print** at the top right. With item types selected the button reads **Print shopping list**.
3. Either way you land on **Print Materials**. The line under the heading says exactly what is on the sheet — for example *Shopping list by material · All houses · All items*.
4. Click **Print** to send it to a printer, or save it as a PDF from your browser's print window.



Pinecrest First Nation (DEMO)

Print Materials Print

TumbleTracker
Pinecrest First Nation (DEMO)

MATERIALS

Pinecrest First Nation (DEMO) — Materials
Generated 9/25/2026
Shopping list by material · All houses · All items

Door Hardware — 1 units needed

Size / Qty	Needed	Houses	Addresses
1	1	1	103 Riverside Dr

Door Sweeps — 2 units needed

Size / Qty	Needed	Houses	Addresses
2	2	1	200 Pinecrest Ave

Doors and windows — 1 units needed (1 qty not specified, counted as 1)

Size / Qty	Needed	Houses	Addresses
regular	1	1	109 Riverside Dr

Fire Extinguisher — 1 units needed

Size / Qty	Needed	Houses	Addresses

Designed to meet WCAG 2.1 AA · Accessibility · Privacy · Manual

The printable sheet carries the filters you set.

> Set the filter to **Outstanding** before you print a shopping list. Otherwise the sheet includes everything that has already been bought.

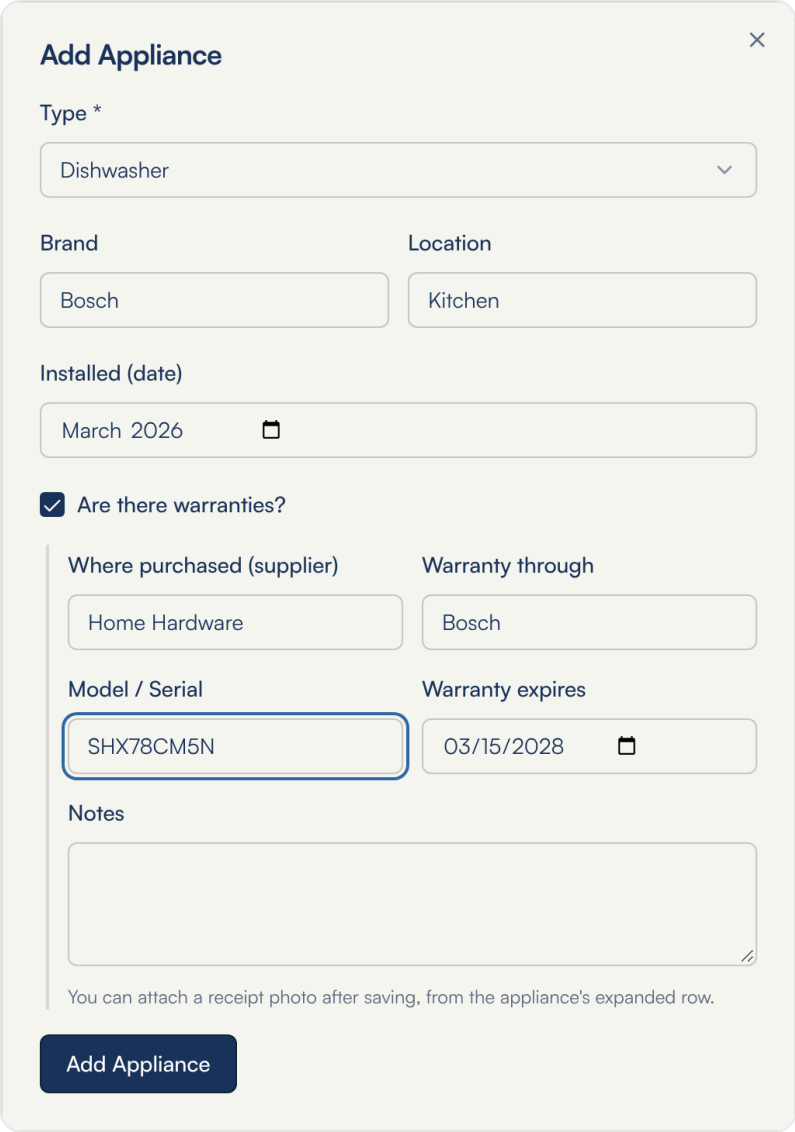
Where to find it: Materials in the menu for the whole community; **Properties** → a house → **Materials** for one house.

7. Appliances and warranties

Each house has an **Appliances** card for the furnace, the water heater, the stove and the rest. Record the warranty when the appliance goes in, and TumbleTracker watches the date for you: it labels the warranties that are running out and emails a reminder before they do.

Recording an appliance

1. Open the house and click **Add Appliance** on the **Appliances** card.
2. Pick the **Type** — *Furnace*, *Water Heater*, *Dishwasher* and so on. If it is not in the list, pick **Other** and a **Name** box appears for you to say what it is.
3. Fill in **Brand** and **Location** (*Kitchen*, *Basement*), and the month and year it went in under **Installed (date)**.
4. If it has a warranty, tick **Are there warranties?**. Five more boxes open: **Where purchased (supplier)**, **Warranty through** (the manufacturer or the dealer), **Model / Serial**, **Warranty expires** and **Notes**.
5. Click **Add Appliance**. The **×** at the top right (or **Esc**) closes the window without saving.

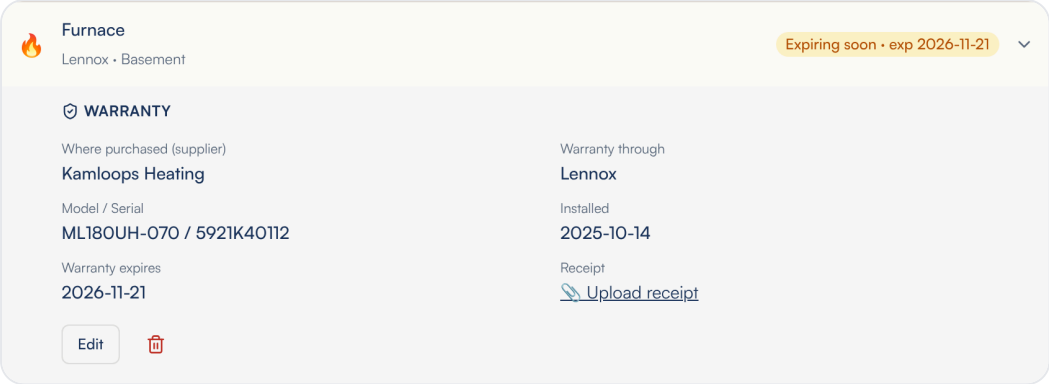


Tick **Are there warranties?** and the warranty boxes open.

> **Model / Serial** sits with the warranty boxes, so it only shows once **Are there warranties?** is ticked. The warranty company will ask for it, so copy it off the plate on the appliance while you are there.

Attaching the receipt

1. Save the appliance first — the receipt is added afterwards, and only to an appliance with a warranty recorded. On the **Appliances** card, click the appliance's row to open it.
2. Beside **Receipt**, click the underlined **Upload receipt** link and pick a photo of the receipt. It is sent as soon as you choose it.
3. Click **View receipt** to see it again, or **remove** to take it off.



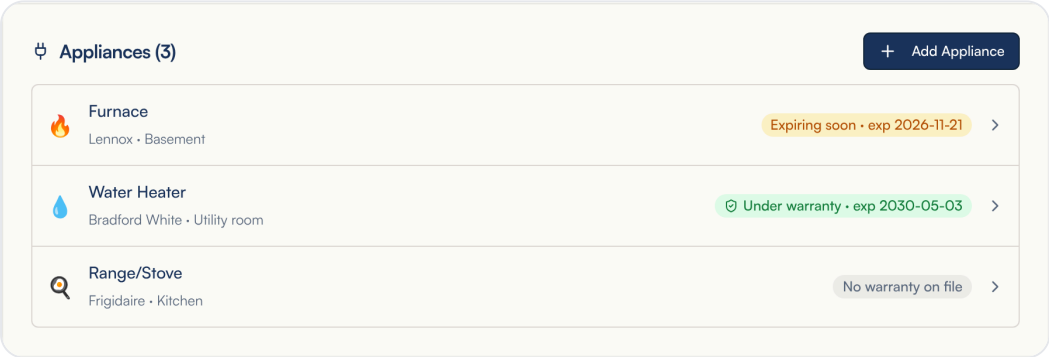
Click a row to open its warranty details.

Warranty labels

Every appliance row carries a label on the right, with the expiry date after it when there is one.

Expiring soon (amber) means the warranty runs out within the next 90 days. **Expired warranty** (also amber) means the date has passed.

Under warranty (green) means more than 90 days are left, or the warranty is recorded with no expiry date. **No warranty on file** (grey) means the warranty box was never ticked.



Amber means look at it now.

Warranty reminder emails

TumbleTracker checks the warranty dates once a day. When a warranty is 90 days from running out it sends a reminder, and it sends a second one at 30 days. Each goes once. If a warranty is already inside 30 days when it is first recorded, you get one reminder, not two. An expired warranty gets no email.

The reminders go to every active user in your community with the **Receive reminder emails (maintenance and warranties)** box ticked — the same people who get the maintenance reminders in the next chapter.

> Your administrator chooses who gets them, in **Manage Users**. If you want the reminders, ask them to tick **Receive reminder emails (maintenance and warranties)** for you.

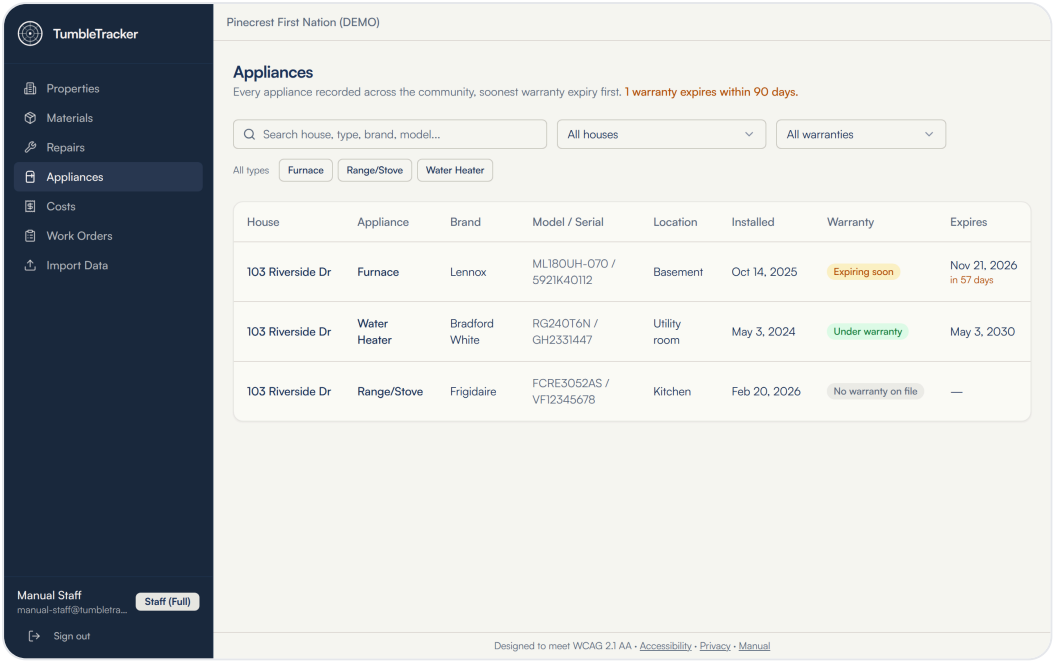
Editing or removing an appliance

1. Click the appliance's row on the house's **Appliances** card to open it.
2. Click **Edit** to change it. On an appliance with no warranty recorded, the same button reads **+ Are there warranties?**, and opens the window ready to add one. Click **Save Changes** when you are done.
3. To remove the appliance, click the red bin beside that button and confirm with **Delete**.

> Deleting an appliance removes its warranty details with it, and cannot be undone. When an appliance is replaced, add the new one first, then delete the old one.

Every appliance in the community

1. Click **Appliances** in the menu. Every appliance across all of your houses is listed with its house, the soonest warranty expiry first. The line under the heading tells you how many warranties expire within 90 days, and an **Expiring soon** row shows how many days are left.
2. Narrow the list with the search box, the house dropdown, the warranty dropdown (**All warranties**, **Expiring soon**, **Expired**, **Under warranty**, **No warranty on file**) and the type buttons under them.
3. The **Warranties Expiring** card on **Properties** opens this screen with **Expiring soon** already chosen.
4. This screen is for looking. To add, change or remove an appliance, click its house name to open the house and use its **Appliances** card.



One list for the whole community; the house name is a link.

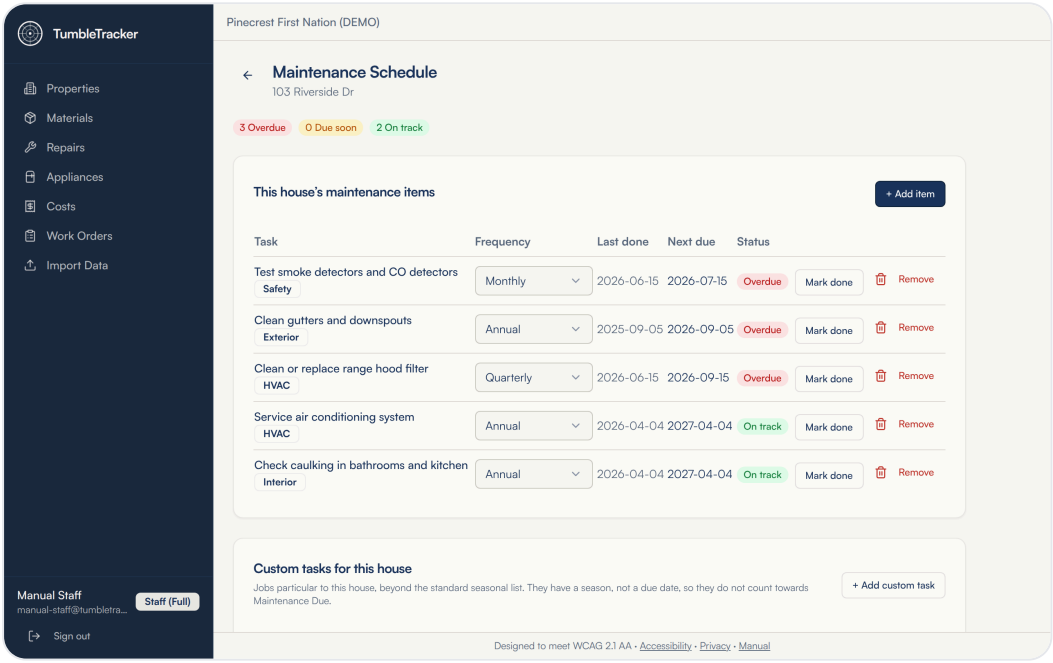
Where to find it: Properties → a house → **Appliances**, or **Appliances** in the menu.

8. Seasonal maintenance

Some jobs come round on a clock: smoke detectors every month, the furnace filter every quarter, the gutters every year. Each house has a maintenance schedule that holds those jobs, works out when each is next due, and flags the ones that are late.

Opening the schedule

1. Open the house and click **Maintenance Schedule** in the row of buttons at the top.
2. The card **This house's maintenance items** lists each job with its **Frequency**, when it was **Last done**, when it is **Next due**, and its **Status**. The three counts above the card add up the statuses.
3. **Overdue** (red) means the next due date has passed. **Due soon** (amber) means it falls within the next 14 days, or no due date is set. **On track** (green) is everything else.

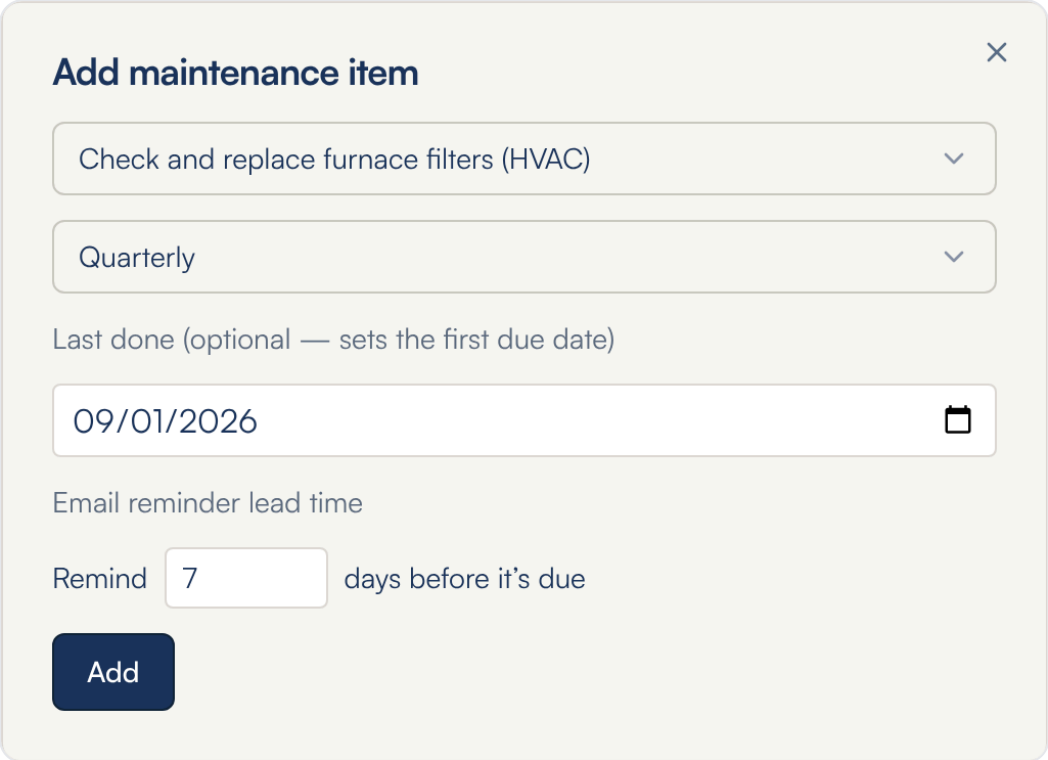


One house's schedule. Overdue and Due soon items also count towards **Maintenance Due** on **Properties**.

Adding a task

1. Click **+ Add item**. The **Add maintenance item** window opens.
2. Pick the job from the first dropdown (it reads *Choose a task* until you do). The list is TumbleTracker's standard seasonal list, without the jobs this house already has. For a job that is not on it, use **Custom tasks for this house** below instead.
3. Pick how often it comes round: **Weekly**, **Monthly**, **Quarterly**, **Semi-annual**, **Annual** or **Every 2 years**.

4. If you know when it was last done, enter the date. TumbleTracker counts the first due date on from it. Leave it empty and the job is due today.
5. Under **Email reminder lead time**, set how many days before it is due the reminder email goes. It starts at 7.
6. Click **Add**. The × at the top right (or **Esc**) closes the window without saving.



A last-done date sets the first due date.

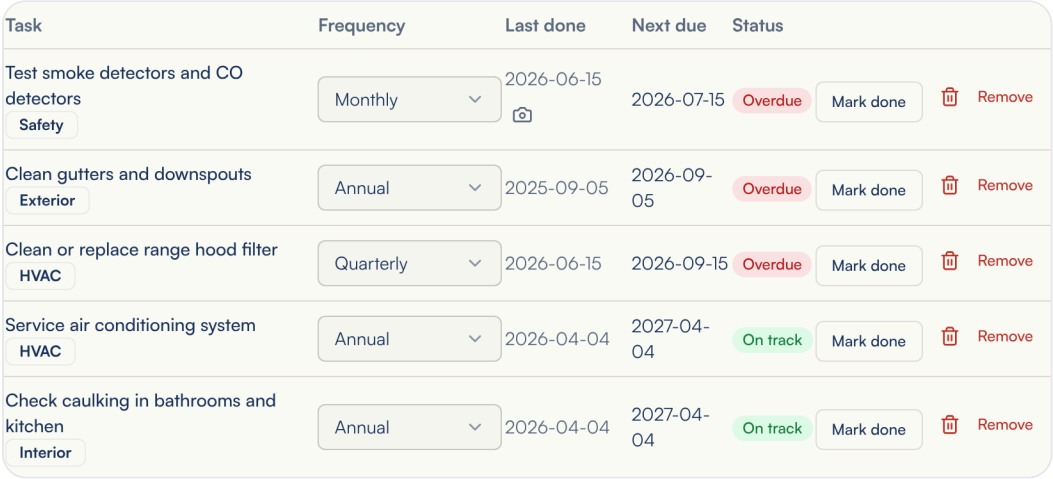
Marking a task done

1. Click **Mark done** on the task's row. There is no window and no Save button.
2. TumbleTracker records the job as done today under your name. **Last done** becomes today, and **Next due** moves on by one round of the frequency — a Quarterly job marked done today is next due three months from today.
3. The status and the counts at the top change to match.

> Changing a job's **Frequency** on its row is saved straight away, and **Next due** moves to match, counted on from the **Last done** date — a job last done 2026-06-15 and changed to Quarterly is next due 2026-09-15. A job that has never been done has no last-done date to count from, so its **Next due** stays as it is.

Photos on a maintenance item

1. Once a job has been marked done, a small camera button, **Add photo**, sits under the date in its **Last done** column.
2. Click it and pick one image — a photo of the new filter, the cleaned gutter. It is sent as soon as you choose it; there is no separate upload step. It appears as a thumbnail beside the camera. Repeat for more.
3. Click a thumbnail to see it full size; **Esc** closes it.
4. To remove one, open it full size, click the red **Delete photo** button below the picture and confirm with **Delete**. If a photo cannot be added or removed, a red message says why.



The camera under **Last done** adds a photo to that round of the job.

> Photos belong to the most recent **Mark done**. When you mark the job done again, the row starts a fresh, empty strip for the new round. A job that has never been marked done in TumbleTracker has no camera button yet.

Removing a task

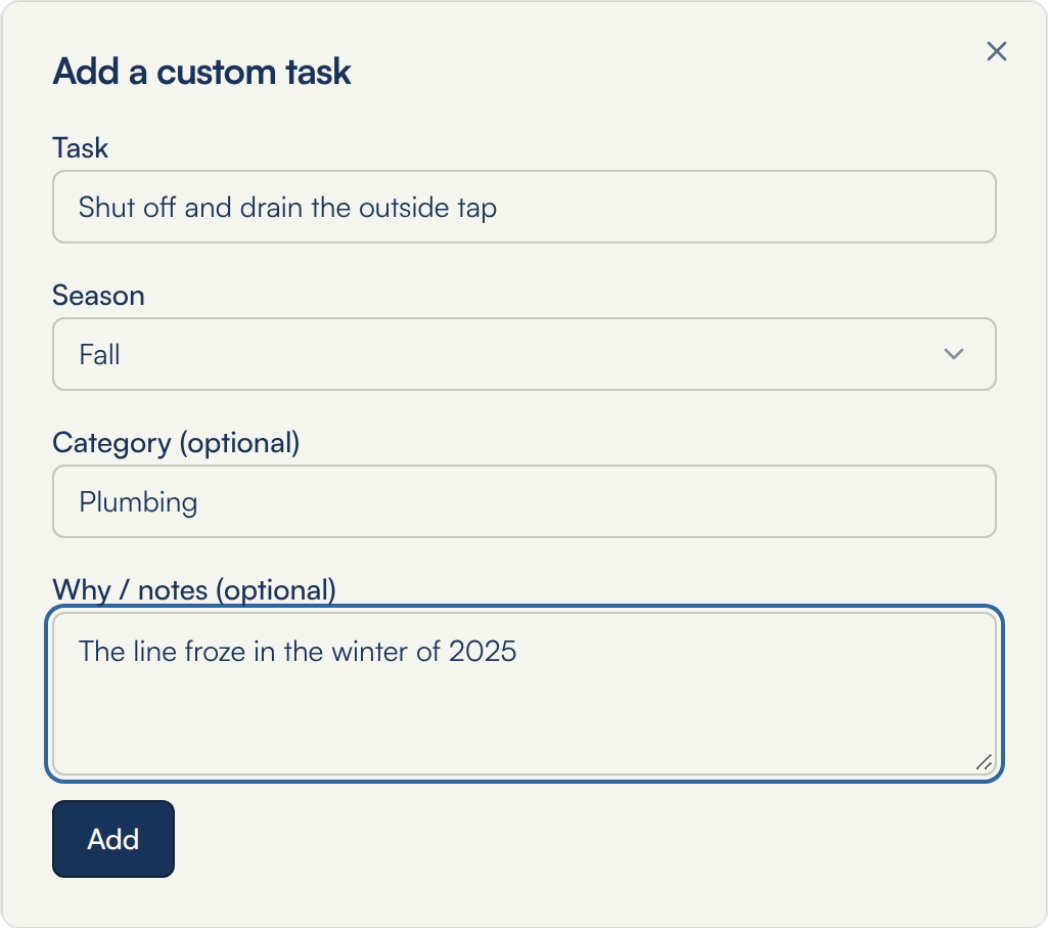
1. Click **Remove** on the task's row.
2. Confirm with **Delete**. The job comes off this house's schedule.

Custom tasks for this house

Some jobs belong to one house only — a pellet stove auger, an outside tap that freezes. The second card on the page, **Custom tasks for this house**, holds those. A custom task has a season, not a due date, so it never turns red and it does not count towards **Maintenance Due**.

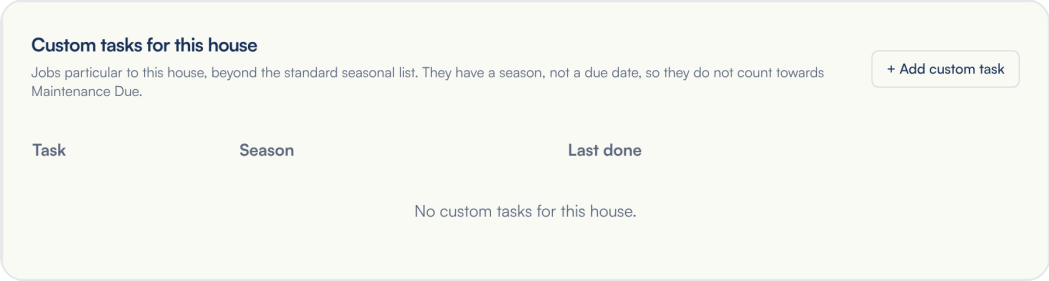
1. Click **+ Add custom task**. The **Add a custom task** window opens.

2. Describe the job in **Task**. It is the only box you must fill in — the **Add** button stays grey until you do.
3. Pick a **Season**: **Spring**, **Fall**, **Winter**, **Monthly**, **Quarterly**, **Annual** or **General**. It starts at General.
4. Add a **Category (optional)** such as *Plumbing* — left empty, it is filed under General — and anything worth knowing in **Why / notes (optional)**.
5. Click **Add**. The task appears on the card.



A custom task has a season instead of a frequency.

1. When the job is done, click **Mark done** on its row. **Last done** shows today's date and your name.
2. To take a custom task off the house, click **Remove** and confirm with **Delete**. This removes its record of past **Mark done** dates too.



The custom-task card, before any have been added.

Reminder emails

TumbleTracker checks every schedule once a day. When a job comes within its reminder lead time — 7 days unless you changed it — it goes into one email listing every job that has just come due, with its house and due date. Each job is emailed once. It is emailed again only after it is marked done or its frequency is changed, which starts the next round. Custom tasks are not emailed.

The emails go to every active user with the **Receive reminder emails (maintenance and warranties)** box ticked — the same list as the warranty reminders in the last chapter.

> If you want the reminders, ask your administrator to tick **Receive reminder emails (maintenance and warranties)** for you in **Manage Users**.

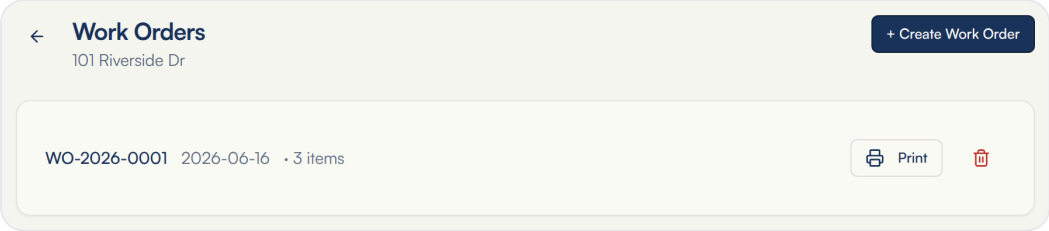
Where to find it: Properties → a house → **Maintenance Schedule**.

9. Work orders

A work order is the sheet you hand to whoever is doing the work. You tick the repairs, maintenance jobs and materials you want done at one house, and TumbleTracker numbers the sheet, lays it out for printing, and keeps a copy. Each work order also carries a status, so you can see which ones are still out and close them when the work is done.

Starting a work order

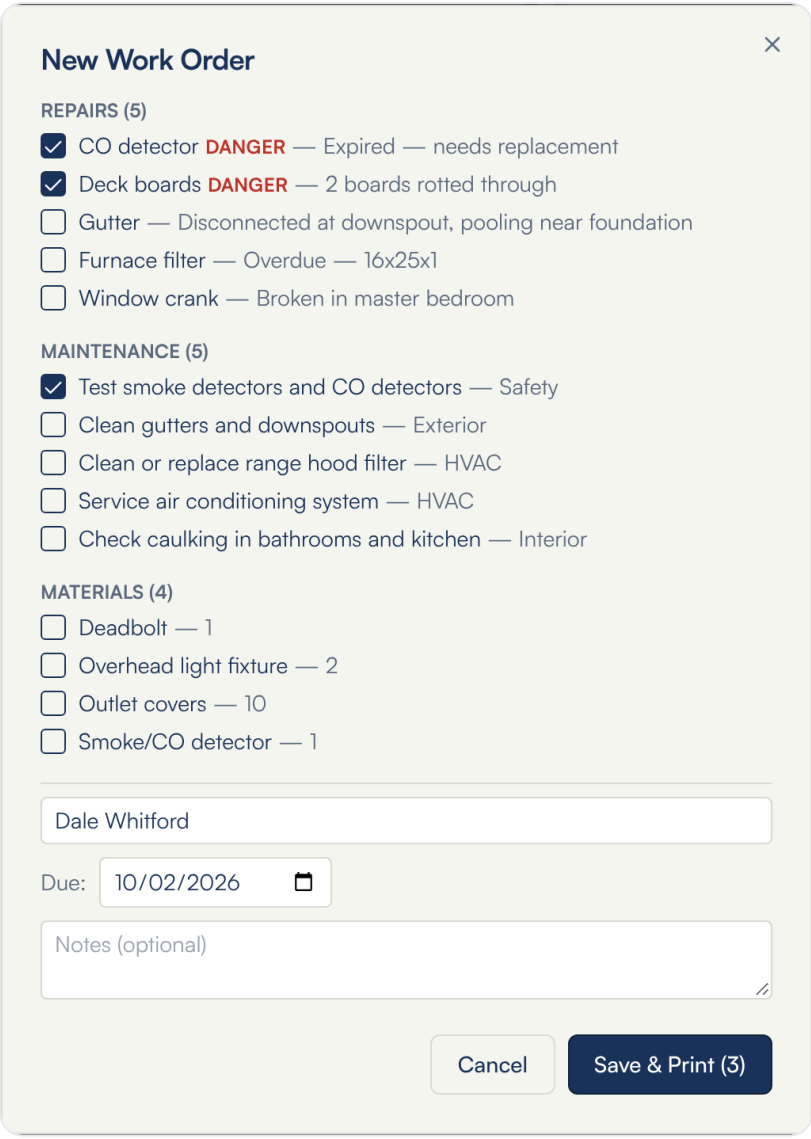
1. Open the house and click **Work Orders** in the row of buttons at the top.
2. The house's own work orders are listed with their number, the date issued and how many items each holds.
3. Click **+ Create Work Order**. The **New Work Order** window opens.



One house's work orders.

Choosing what goes on it

1. The window lists the house in three groups, each with a count: **Repairs**, **Maintenance** and **Materials**. Tick every line you want on the sheet.
2. **Repairs** shows every repair that is not yet **Completed** — **Pending**, **In Progress** and **Deferred** alike. Dangerous ones carry a red **DANGER**. A **Completed** repair is not offered.
3. **Maintenance** shows every job on the house's schedule, due or not. **Materials** shows everything on the house's materials list.
4. Type the worker's name in the first text box (it reads *Assigned to (worker name)* until you type), pick a **Due** date, and add anything they need to know in the *Notes (optional)* box. All three can be left empty.
5. Click **Save & Print**. The number on the button is how many lines you ticked; it stays grey until you tick at least one. **Cancel** closes the window without saving.



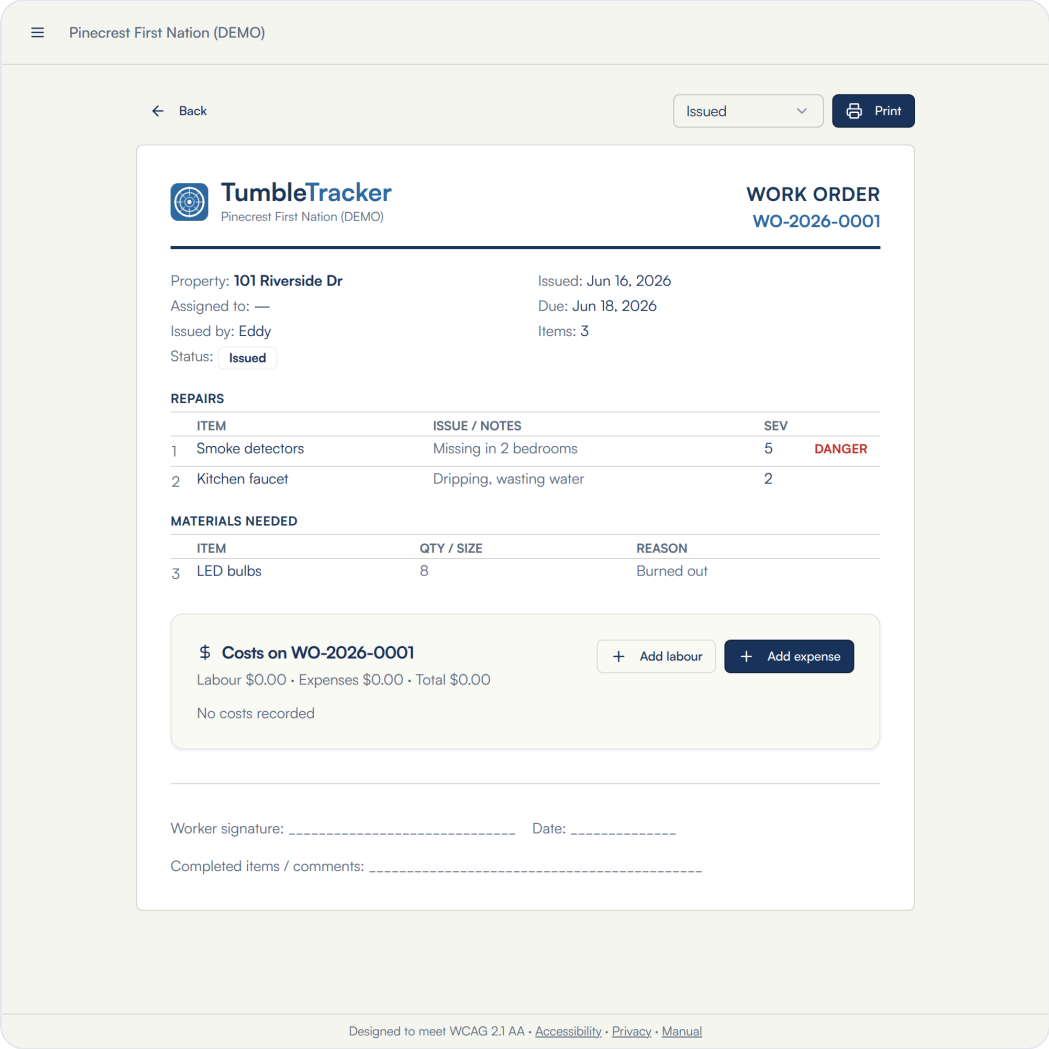
Tick what you want done; the button counts it.

A work order can hold only lines from its own house, as they are when you save it. If one of the ticked lines has been deleted in the meantime — in another tab, or by someone else — the work order is not saved and TumbleTracker says, for example, *One of the chosen repairs isn't on this property. Refresh the page and choose again.* (or the same for a maintenance task or a material). Nothing is written and no work-order number is used up: refresh the page and tick again.

A work order copies the lines as they are when you save it. Changing or finishing a repair later does not change a work order already issued — the sheet stays a record of what was handed out.

Printing a work order

1. **Save & Print** takes you straight to the finished sheet. To reach an older one, click **Print** beside it on the house's **Work Orders** screen or on the **Work Orders** list in the menu.
2. The sheet is numbered **WO-**, the year it was issued, and a running number — *WO-2026-0001* is the first one of 2026. It shows the house, who it is assigned to, who issued it, the dates, its **Status**, and the ticked lines in **Repairs**, **Maintenance** and **Materials needed**, with lines at the foot for the worker's signature and comments.
3. Click **Print** at the top right. The buttons, the status dropdown beside **Print** and the costs card are left off the paper; the status itself prints in the header. **Back** returns you to the house.

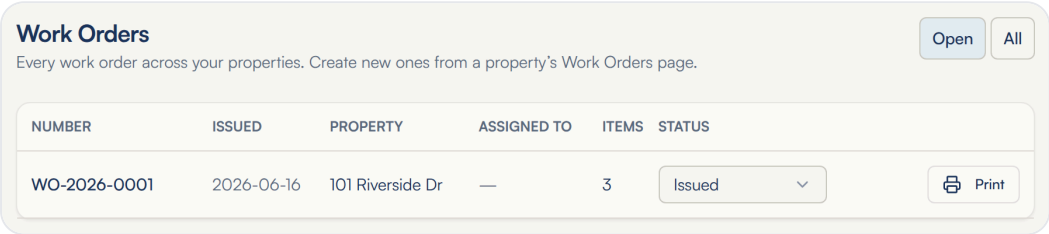


The work order as it appears on screen, before printing.

> The **Costs on** card under the lines, named with the work order's number, is where labour and expenses for this job are recorded; the **Costs** chapter covers it. Once costs are recorded, their total prints on the sheet.

Every work order in the community

1. Click **Work Orders** in the menu. Work orders across your houses are listed with their **Number**, the date **Issued**, the **Property**, who each is **Assigned to**, how many **Items** it holds, and its **Status**.
2. The **Open** and **All** buttons at the top right choose which ones you see. The list opens on **Open**: the work orders still **Issued** or **In Progress**. Click **All** to include the **Completed** and **Cancelled** ones.
3. Click **Print** on a row to open that sheet.
4. New work orders are started from a house, not from this list — open the house and use its **Work Orders** button.



The work orders still open, in one list.

Moving a work order along, and closing it

A new work order starts as **Issued**. Its status goes **Issued** → **In Progress** → **Completed**, or **Cancelled** for one that will not happen.

1. Open the status dropdown — beside **Print** at the top of the work order, or in the **Status** column of the **Work Orders** list in the menu.
2. Pick **In Progress** when the worker starts, and **Completed** when the sheet comes back signed. Pick **Cancelled** for a work order that will not be done. There is no Save button — the change is stored the moment you pick it.
3. A **Completed** or **Cancelled** work order is closed: the date it was closed prints beside its status, and it drops off the **Open** view of the list. Click **All** to see it again. Picking **Issued** or **In Progress** reopens it.

> Closing a work order does not close the work on the house. Mark each repair **Completed** on the house's **Repair Items** card, and click **Mark done** on each maintenance job in the **Maintenance Schedule** — a work order only copies those lines, as the tip above says.

1. To remove a work order issued by mistake, open the house's **Work Orders** screen, click the red bin on its row, and confirm with **Delete**.

> Deleting a work order cannot be undone. Delete only a work order that was never handed out — one a worker has in hand is your record of what they were asked to do. For one that was handed out but will not be done, set its status to **Cancelled** instead.

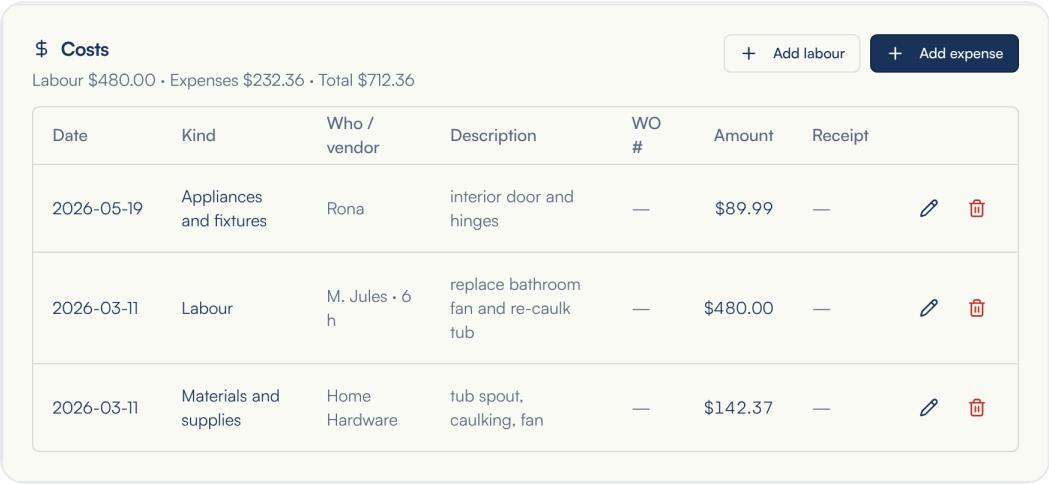
Where to find it: Properties → a house → **Work Orders**, or **Work Orders** in the menu.

10. Costs

TumbleTracker keeps two kinds of cost against each house. **Labour** is what your own crew's time cost. An **expense** is money paid out — materials, a contractor, a permit, the dump. Log them as the money is spent, and the **Costs** screen adds them up for one house or the whole community, for any period you choose.

Where you can log costs

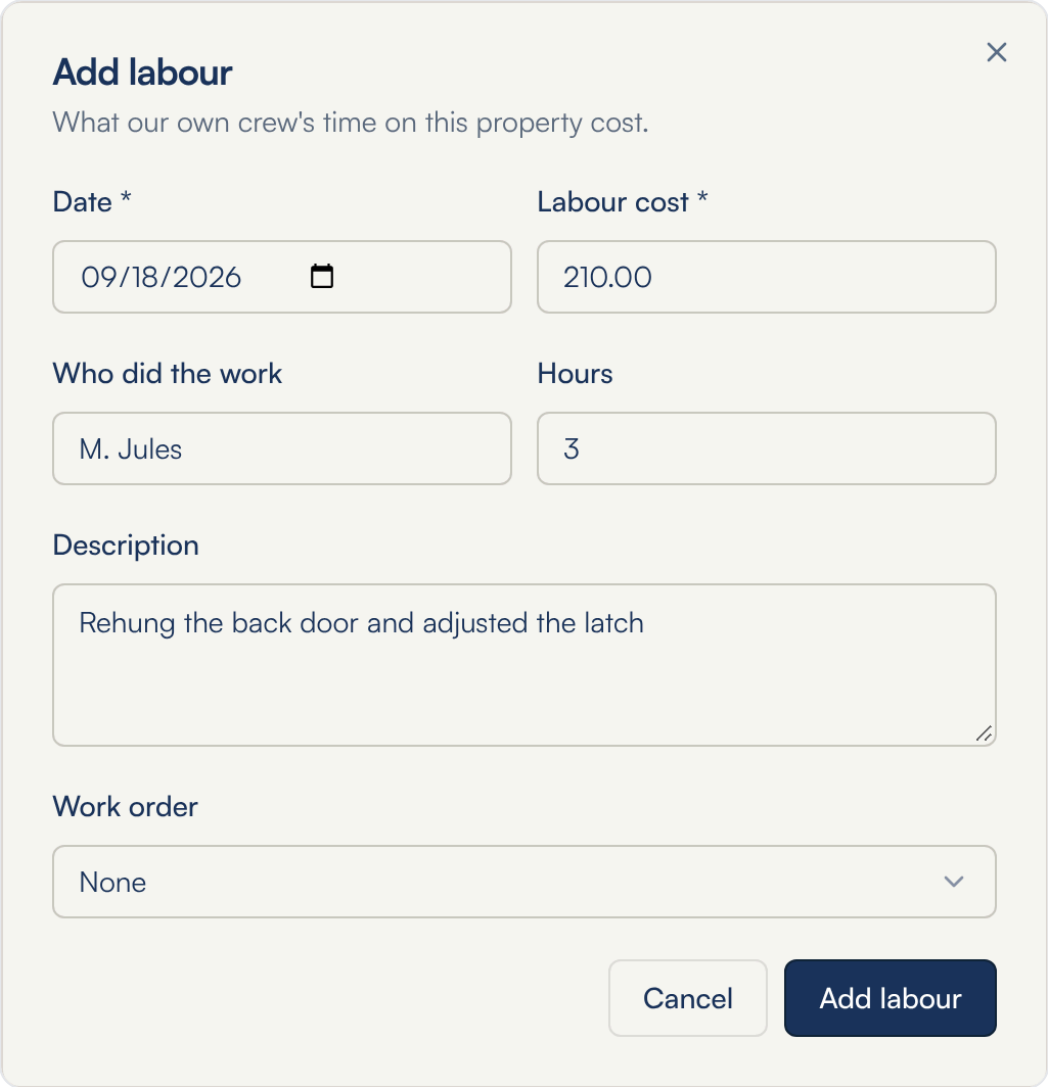
1. Open the house. Further down the page is the **Costs** card. The line under its heading totals everything ever spent on the house: labour, expenses and the two together.
2. Each entry is one row: the date, the kind (**Labour** or the expense category), who did the work or who was paid, the description, the work order number, the amount, and a paperclip if a receipt is attached. Newest entries come first. After ten rows a **Show all** button lists the rest.
3. A work order has the same card, headed **Costs on** and the work order's number. It shows only the costs for that job, and anything you add there is tied to that work order for you.



Every cost on the house, with the running total at the top.

Logging labour

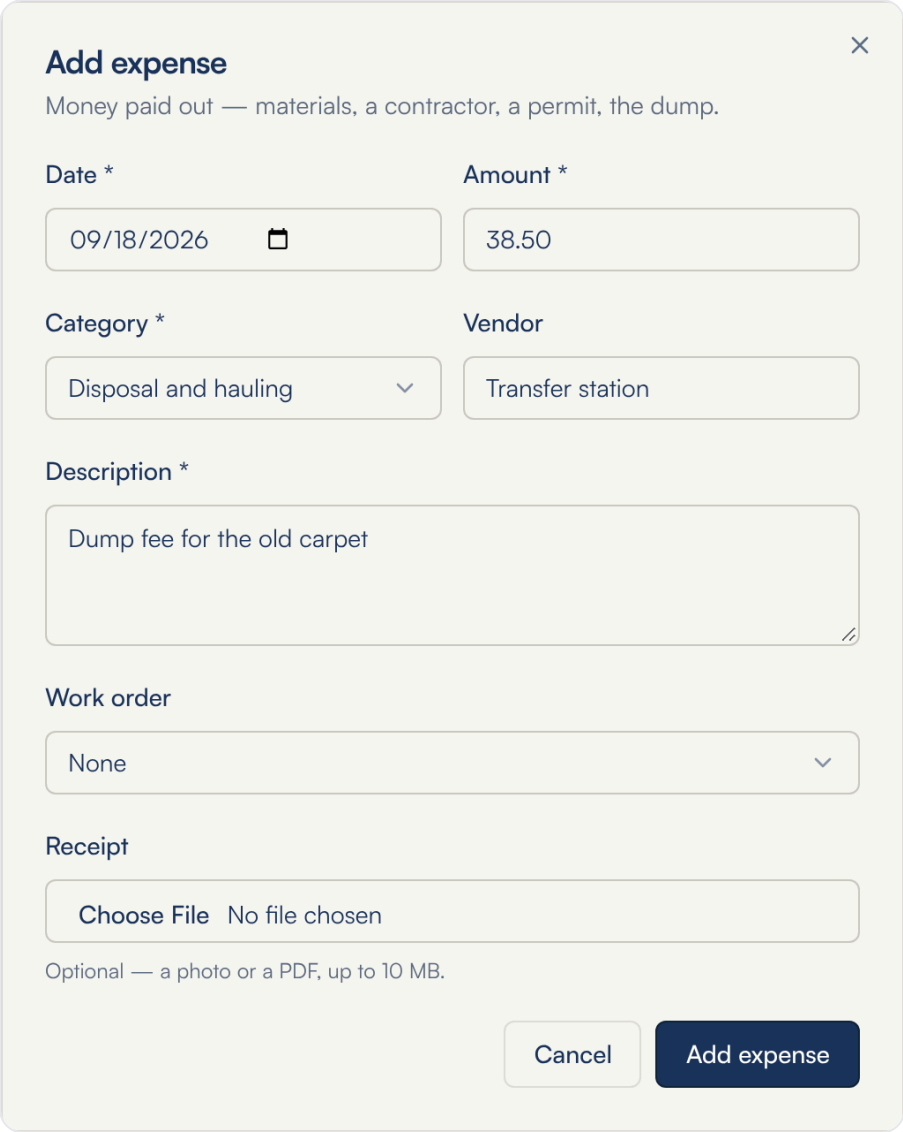
1. On the **Costs** card, click **Add labour**.
2. **Date** starts at today; change it to the day the work was done. Type what the work cost in dollars in **Labour cost**. These two are required.
3. **Who did the work** and **Hours** are optional. Hours go in quarter-hour steps; leave the box empty if you only know the dollar figure.
4. Say what was done in **Description** (optional). If the work was on a work order, pick it under **Work order**; otherwise leave it at **None**.
5. Click **Add labour**. **Cancel**, the **×** or **Esc** closes the window without saving.



The dollar figure is what counts; hours and name are optional.

Logging an expense

1. On the **Costs** card, click **Add expense**.
2. Set the **Date** and type the **Amount** in dollars.
3. Pick a **Category** — it starts at **Materials and supplies**. The report adds up expenses by these categories, so pick the closest one.
4. Type who was paid in **Vendor** (optional) and what the money was for in **Description**. The description is required on an expense.
5. Pick the **Work order** if there is one.
6. To attach the receipt, click **Choose File** under **Receipt** and pick a photo or a PDF of up to 10 MB. It is optional.
7. Click **Add expense**. The expense is saved first and the receipt is sent straight after.



Category, amount and description are required; the receipt is not.

CATEGORY	USE IT FOR
Materials and supplies	Lumber, filters, caulking, hardware — anything used up on the job
Contractor services	An outside trade's invoice — a plumber, an electrician, a roofer
Appliances and fixtures	A new stove, a water heater, a door, a light fixture
Equipment rental	A rented tool or machine
Permits, inspections and fees	Building permits, inspection fees
Disposal and hauling	Dump fees, bin rental, hauling away
Travel and mileage	Getting the crew or the materials to the house

CATEGORY	USE IT FOR
Other	Anything that fits none of the above

> If the receipt will not attach — a file over 10 MB, for example — the window stays open and says *The entry saved, but the receipt didn't attach*. The expense is already saved, so do not add it again: pick a smaller file and click **Save changes**.

Changing or removing an entry

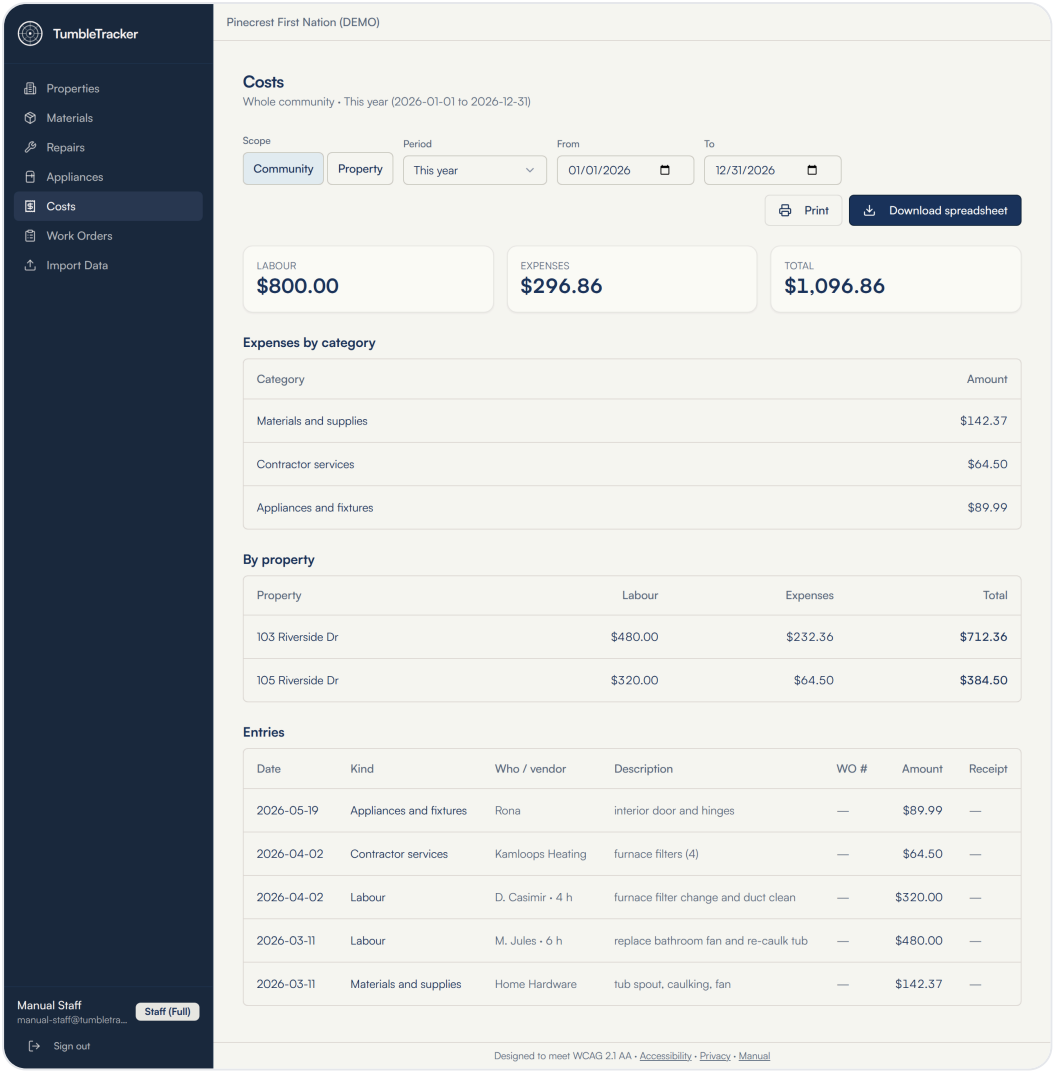
1. Click the pencil on the entry's row. The window opens with what was typed, headed **Edit labour** or **Edit expense**. Change it and click **Save changes**.
2. On an expense with a receipt, **View receipt** opens it and **Remove** takes it off. Choosing a new file replaces it. You can also open a receipt from the paperclip on the row.
3. To delete an entry, click the red bin on its row and confirm with **Delete**.

> A deleted entry is gone, receipt and all, and every total drops with it. If an amount was only typed wrong, correct it with the pencil instead.

> With read-only access you see the **Costs** card and the report, but not the **Add labour** and **Add expense** buttons, the pencil or the bin.

The Costs report

1. Click **Costs** in the menu. The report opens on the whole community for **This year**.
2. Under **Scope**, **Community** covers every house. Click **Property** and choose a house from the list to see just that one.
3. Pick a **Period**: **This month**, **Last month**, **This year**, **Last year** or **All time**. The **From** and **To** dates fill in to match. To report on any other stretch, type your own dates in **From** and **To**; the period then reads **Custom range**. Both ends are included.
4. The three tiles give **Labour**, **Expenses** and the **Total** for that scope and period. Under them, **Expenses by category** lists only the categories money was spent on, and **By property** (community scope only) splits the total house by house — click an address to open that house.
5. **Entries** lists every labour entry and expense behind the numbers, with nothing left out.



One community, one year, every dollar.

> If the **From** date is later than the **To** date, the report says *The "From" date is after the "To" date. Swap them to see the report.* Nothing is shown and nothing can be downloaded until you fix it. The report remembers your scope and period while the browser tab stays open.

Printing and downloading

1. Click **Print** to print the report on the screen, or save it as a PDF from the print window. The paper copy carries a **COST REPORT** heading with your community's name and the date; the buttons and boxes are left off.
2. Click **Download spreadsheet** for an Excel file of the same report. It is named for what it holds, such as *costs-community-2026-01-01-2026-12-31.xlsx*.

3. The file has four sheets: **Summary** (the totals and the categories), **By property** (community scope only, so a one-house report has three sheets), **Labour** and **Expenses**. Money is formatted as dollars and adds up like any other number in Excel.

> **Download spreadsheet** stays grey until there is a report to download — while no house is chosen, or while a date is half typed.

Costs on the property report

A house's printed report (next chapter) has a **Costs** section, ticked by default. It lists every entry ever recorded on the house under the heading **Costs (all time)**, with the totals beside it. The year you pick for that report does not narrow the costs — use the **Costs** screen when you need one year's figures.

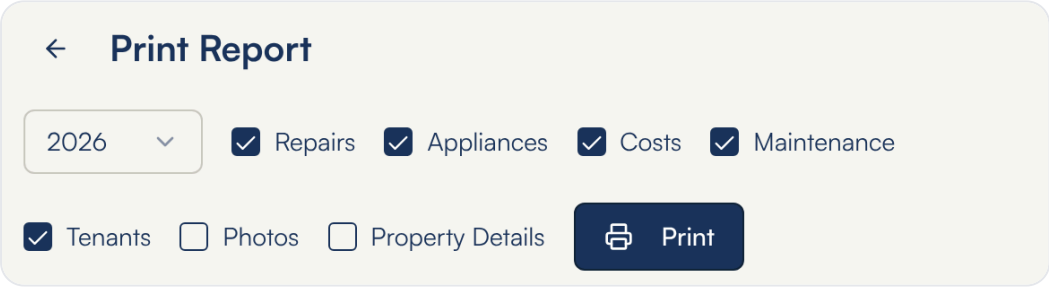
Where to find it: Properties → a house → **Costs**, a work order's page, or **Costs** in the menu.

11. Property reports

The property report is one house on paper: its repairs, appliances, costs, maintenance and tenants in a single printout. Use it for a site visit, a council meeting, or a file copy when the house changes hands. You choose which sections go in.

Printing a property report

1. Open the house and click **Print** in the row of buttons at the top.
2. The **Print Report** screen opens with the report laid out below a row of choices. Pick the year in the box on the left — it sets which year's maintenance checklist is shown.
3. Tick the sections you want. **Repairs**, **Appliances**, **Costs**, **Maintenance** and **Tenants** start ticked; **Photos** and **Property Details** start unticked. The report below changes as you tick.
4. Click **Print** on the right. Your browser's print window opens. Pick a printer, or choose **Save as PDF** as the destination to keep a file instead. **Print** stays grey until every ticked section has loaded, so a report is never printed half-filled.
5. The arrow at the top left takes you back to the house.



Tick what goes on the paper, then **Print**.

> The choices are not saved. Each time you open the report they start again from the ticks above. The year box, the ticks and the buttons never print.

What is in it

The report prints in this order. A section you unticked is simply left out.

SECTION	WHAT IT SHOWS
Heading	The TumbleTracker **PROPERTY REPORT** banner, the address, the date the report was made and the year you picked, and the heating type, filter size and wood stove if recorded

SECTION	WHAT IT SHOWS
Property Details	Every detail filled in under the house's **Property Details**, section by section
Repair Items	Every repair on the house, with its issue, status and whether it is dangerous
Appliances	Each appliance with its brand and model, location, install date and warranty
Costs (all time)	Every labour entry and expense ever recorded on the house, with the labour, expense and total figures in the heading — not only the year you picked
Maintenance Checklist	The seasonal checklist for the year you picked, grouped *Monthly*, *Quarterly*, *Spring*, *Fall*, *Winter*, *Annual* and *General*. A job marked done that year is ticked, with who did it and when; the house's custom tasks follow
Tenants / Residents	Each tenant's name, phone, email and notes
Photos	The house's photos, grouped by category, with their captions

≡ Pinecrest First Nation (DEMO)

Furnace filter	Overdue — 10x20x1	Pending	No
Window crank	Broken in master bedroom	Pending	No

Appliances (3)

Appliance	Brand / Model	Location	Installed	Warranty
Furnace	Lennox · ML180UH-070 / 5921K40112	Basement	2025-10-14	Expires 2026-11-21
Water Heater	Bradford White · RG240T6N / GH2331447	Utility room	2024-05-03	Expires 2030-05-03
Range/Stove	Frigidaire · FCRE3052AS / VF12345678	Kitchen	2026-02-20	None

Costs (all time) — Labour $480.00 · Expenses $232.36 · Total $712.36

Date	Kind	Description	WO #	Amount
2026-05-19	Appliances and fixtures	Rona · interior door and hinges	—	$89.99
2026-03-11	Labour	M. Jules · 6 h · replace bathroom fan and re-caulk tub	—	$480.00
2026-03-11	Materials and supplies	Home Hardware · tub spout, caulking, fan	—	$142.37

Maintenance Checklist — 2026

Monthly

- ☐ Check and replace furnace filters — HVAC
- ☐ Test smoke detectors and CO detectors — Safety
- ☐ Check under sinks for leaks — Plumbing
- ☐ Check fire extinguisher accessibility — General

Quarterly

- ☐ Clean or replace range hood filter — HVAC
- ☐ Flush hot water tank (if applicable) — Plumbing
- ☐ Test ground fault circuit interrupters (GFCIs) — Safety
- ☐ Inspect for signs of pests or rodents — Pest Control

Spring

- ☐ Inspect roof for winter damage — Exterior
- ☐ Clean gutters and downspouts — Exterior
- ☐ Inspect foundation for cracks — Exterior
- ☐ Check exterior drainage grading — Exterior
- ☐ Inspect and repair caulking around windows and doors — Exterior
- ☐ Service air conditioning system — HVAC
- ☐ Turn on exterior hose bibs — Plumbing
- ☐ Replace smoke detector batteries — Safety

Fall

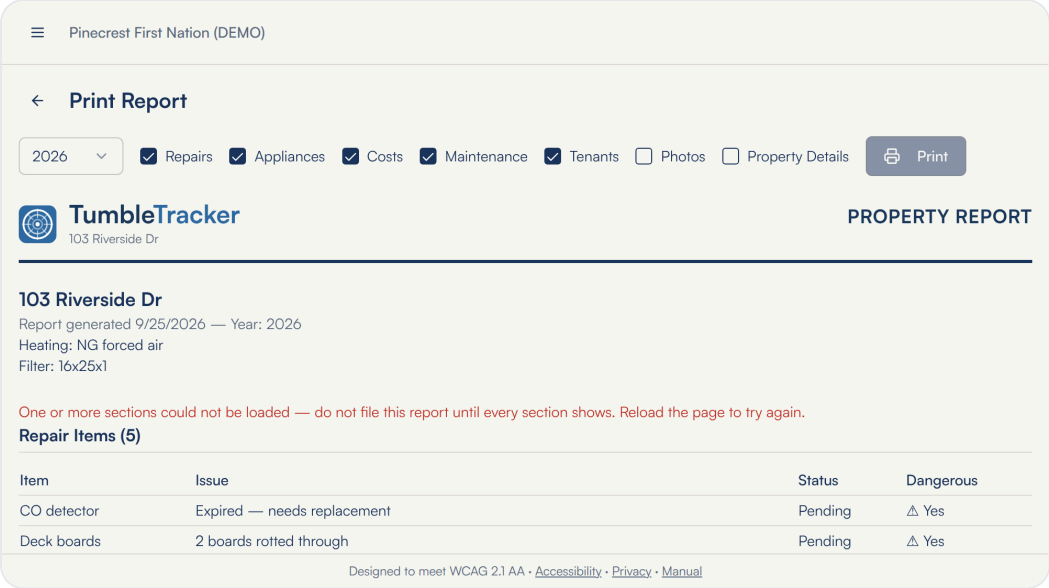
- ☐ Service furnace / heating system — HVAC
- ☐ Clean and inspect chimney and wood stove — HVAC
- ☐ Winterize exterior hose bibs — Plumbing
- ☐ Insulate exposed pipes in crawl spaces — Plumbing
- ☐ Clean gutters and downspouts (fall leaves) — Exterior
- ☐ Inspect and seal exterior gaps and cracks — Exterior
- ☐ Check weather stripping on doors and windows — Exterior

Designed to meet WCAG 2.1 AA · Accessibility · Privacy · Manual

The top of one house's report, with the default sections ticked.

If a section could not be loaded

1. When a ticked section cannot be fetched — a dropped connection, say — that section reads, for example, *Tenants / Residents could not be loaded.*
2. A red line under the heading says *One or more sections could not be loaded — do not file this report until every section shows. Reload the page to try again.* and **Print** stays grey.
3. Reload the page. If the section still will not load, untick it to print the rest, or try again later.



A section is missing, so **Print** is grey and the red line says why.

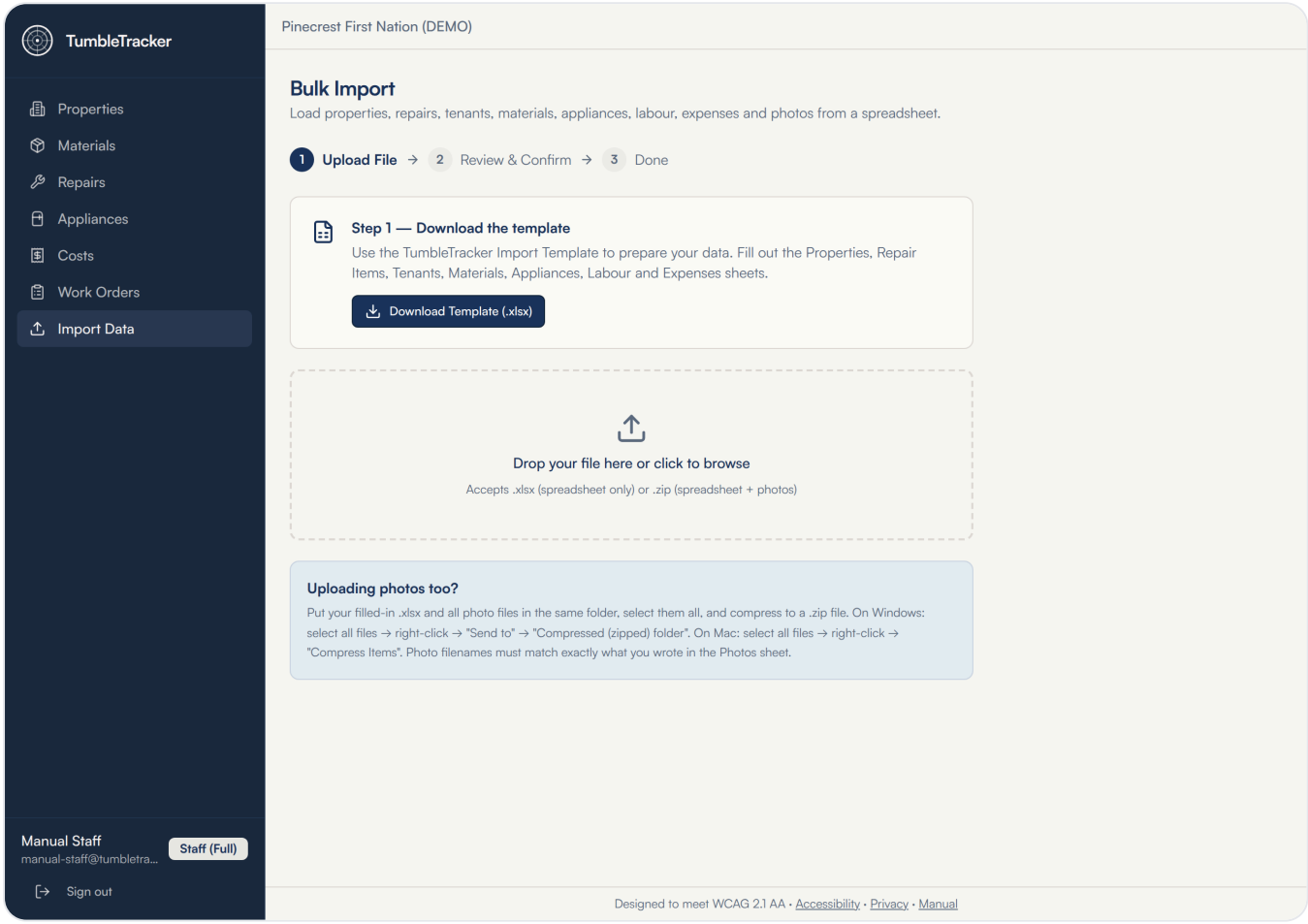
> The report prints tenants' phone numbers and email addresses. Treat the paper — and any PDF you save — as private, and untick **Tenants** when the copy is going to someone who should not have them.

Where to find it: Properties → a house → **Print**.

12. Importing data

When you already have your houses in a spreadsheet, you do not have to type them in one by one. Download TumbleTracker's template, copy your records into it, and upload it. TumbleTracker checks every row and shows you what it found before anything is saved.

> Anyone with full access can import. With read-only access, **Import Data** is not in the menu, and the import screen, if you reach it by its address, says your account cannot import data.



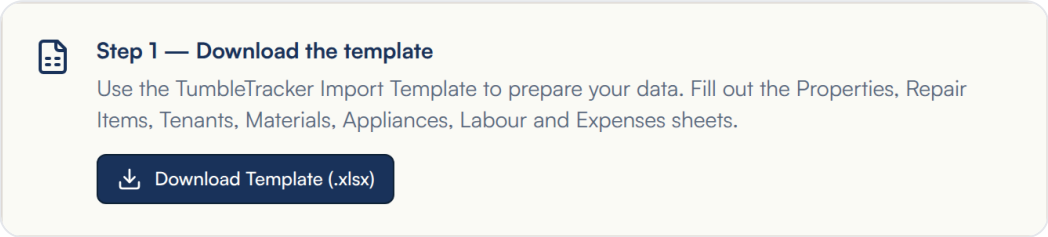
Three steps: upload, review, done.

Downloading the template

1. Click **Import Data** in the menu. The **Bulk Import** screen opens.
2. Click **Download Template (.xlsx)**. The file *TumbleTracker_Import_Template.xlsx* is saved to your computer. Open it in Excel or any spreadsheet program.
3. The first sheet, **Instructions**, explains the file: how to use it, what each of the nine sheets is for, a **COLUMNS** list for every sheet saying what each column takes and what the import

does with it, and the severity scale, *1 — Low* to *5 — Critical*. The nine sheets after it are the ones TumbleTracker reads. Do not rename them.

4. On every sheet, row 1 says what the sheet is for, row 2 holds the column headings and row 3 marks each column ★ **REQUIRED** or *optional*. Your data starts on row 4.
5. Keep the headings in row 2 as they are: TumbleTracker finds each column by its heading. A column with a heading it does not know is ignored. If one of its own columns has been renamed, the preview warns, for example *Column 'Notes' was not found on the Properties sheet — its values will be left blank.*



Always start from a freshly downloaded template.

> The template arrives with example rows already filled in on row 4 and below — *123 Example Street*, *456 Sample Avenue*, *789 Demo Crescent* and their repairs, tenants and costs. You can leave them there or delete them: any row that names one of those three addresses is ignored, and the preview says so with one warning per sheet, such as *3 example rows from the template (123 Example Street, 456 Sample Avenue, 789 Demo Crescent) ignored — they are not part of your community.* Do not use those addresses for a real house.

What goes on each sheet

Required columns are in bold. Fill in only the sheets you need; an empty sheet is skipped. Every sheet also ends with an optional **Row Ref** column — see *Updating what you imported before* below.

SHEET	ONE ROW PER	COLUMNS
Properties	house	**Property Address**, Heating Type, Furnace Filter Size, Has Wood Stove, Notes
Repair Items	repair	**Property Address**, **Item**, **Issue Description**, **Dangerous?** (Yes or No), **Severity** (1 to 5), Status, Assigned To, Date Completed, Notes
Tenants	tenant	**Property Address**, **Tenant Name**, Phone, Email, Notes

SHEET	ONE ROW PER	COLUMNS
Photos	photo	**Photo Filename**, **Property Address**, **Linked To**, Item Name, Caption / Notes
Custom Maintenance Items	custom task	**Property Address**, **Task Description**, Season, Category, Why / Notes
Materials	material	**Property Address**, Category, **Item**, Size / Qty, Reason, Notes
Appliances	appliance	**Property Address**, **Appliance Type**, Brand, Model / Serial, Location, Installed, Has Warranty, Where Purchased, Warranty Through, Warranty Expires, Notes
Labour	labour entry	**Property Address**, **Date (YYYY-MM-DD)**, **Cost ($)**, Hours, Employee, Description, WO Number
Expenses	expense	**Property Address**, **Date (YYYY-MM-DD)**, Category, **Amount ($)**, **Description**, Vendor, WO Number

Filling it in

1. **The address is what links the sheets.** Type it the same way, letter for letter, on every sheet. *103 Riverside Dr* and *103 Riverside Drive* are two different houses to TumbleTracker.
2. **Repair Items**, **Tenants**, **Photos** and **Custom Maintenance Items** must name a house on the **Properties** sheet of the same file. **Materials**, **Appliances**, **Labour** and **Expenses** may also name a house that is already in TumbleTracker.
3. **Status** is *Pending*, *In Progress*, *Deferred* or *Completed*. Left blank it is *Pending*. An older sheet that says *Complete* still imports as Completed; any other word becomes Pending, and the preview warns.
4. **Severity** is a number from 1 to 5 — the same scale as the **Repairs** chapter, where 5 is Critical.
5. **Season** on a custom task is *Monthly*, *Quarterly*, *Spring*, *Fall*, *Winter*, *Annual* or *General*. Left blank it is *General*.
6. Write dates as *YYYY-MM-DD*, such as *2026-04-14*. Write money as a plain number such as *162.75*; a dollar sign or a comma is fine too. A year on its own, such as *2019*, is not a date: an appliance's **Installed** is then left blank with a warning, and any other date column stops the row with an error.

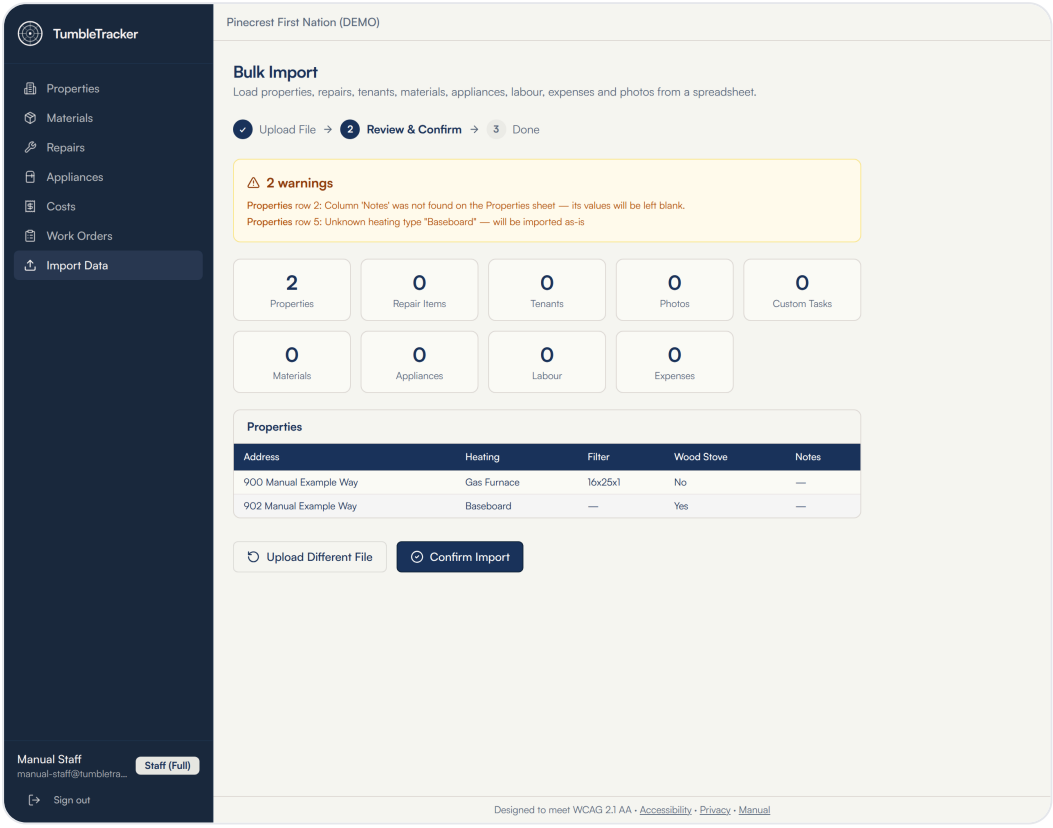
7. **Date Completed** on a repair is read like every other date, and it is kept only when the repair's **Status** is *Completed* — on any other status it is left blank, and the preview warns. A row that moves a repair back from Completed (with its Row Ref) clears the date it had.
8. A tenant's **Email** that is not an email address is left blank, and the preview warns.
9. Many columns have a dropdown in the template — heating type, status, severity, season, material category, appliance type, warranty and expense category among them. A value that is not on the list is not refused: the preview warns and the **COLUMNS** list on the **Instructions** sheet says what happens to it. **Dangerous?** and **Severity** are the exceptions — anything else there is an error.
10. An expense **Category** is one of the eight in the **Costs** chapter. Short words such as *materials*, *contractor*, *permit* or *dump* are understood; anything else is imported as *Other*.
11. **WO Number** is optional. It must be a work order already on that house; if it is not, the cost is still imported, just without the work order.

> To bring photos in, put the filled-in spreadsheet and the photo files in one folder and compress them into a *.zip* file, then upload the zip. Each photo's **Photo Filename** must match the file's name exactly. A photo is attached to a repair: set **Linked To** to *Repair Item* and **Item Name** to the repair's **Item** from the **Repair Items** sheet. A photo linked to a *Maintenance Task* is not imported: the preview lists it as a warning and skips it. Add it from the house after the import, once the job has been marked done (chapter 8). If one house has two repairs with the same **Item** (say two *Window* repairs with different issues), a photo naming that Item cannot tell which one it belongs to: it is left out with a warning. Give such repairs distinct Item names, or add the photo from the house afterwards.

Uploading and previewing

1. On the **Bulk Import** screen, drop your file on the dashed box, or click the box and pick it. It takes a *.xlsx* file, or a *.zip* of the spreadsheet with its photos, up to 90 MB.
2. TumbleTracker reads the file and moves to **Review & Confirm**. Nothing has been saved yet.
3. The count boxes say how many rows of each kind will be added. A row the import will leave alone is not counted — a repair or custom task already on that house, an appliance, labour entry or expense that repeats one, or a row that repeats an earlier row of the file — and a warning names each one. Below the boxes are tables of the **Properties**, and the first ten **Repair Items** and **Materials**, as they will be imported.
4. A red box lists **errors**. While there is even one, there is no **Confirm Import** button — see *Fixing rejected rows* below.

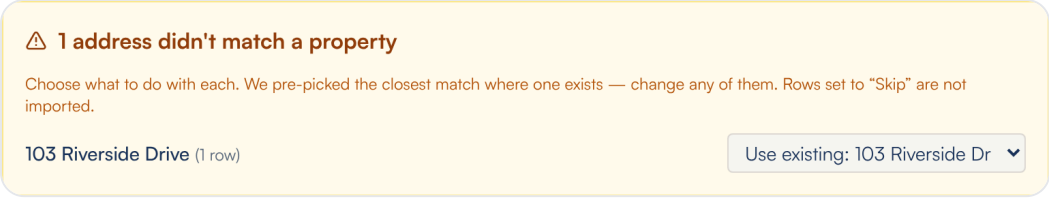
5. A yellow box lists **warnings**: rows that will import, but not quite as written — an unknown heating type imported as typed, a status that becomes Pending, a work order number that is dropped, a maintenance-task photo that is skipped, a column whose heading was not found. The template's example rows being ignored shows here too. Read them, then decide whether to fix the file first.



The preview: what will be imported, and anything to look at first.

Addresses that did not match

1. When a **Materials**, **Appliances**, **Labour** or **Expenses** row names an address that is neither on the **Properties** sheet nor already in TumbleTracker, the preview lists it in a yellow box headed **didn't match a property**, with how many rows use it.
2. Choose what to do with each one. **Use existing** puts the rows on a house you already have — TumbleTracker offers up to three close spellings and pre-picks the closest. When nothing is close, it pre-picks **Create new property**. **Create new property** adds a new house with that address. **Skip these rows** leaves them out.



A near-miss spelling, matched to the house you already have.

When the file has materials, the preview also asks how to bring them in. **Add** keeps each house's current materials list and adds these rows to it. **Replace** clears the materials list of every house on the sheet first, then adds these — use it when the sheet is the complete list. An item on the sheet that was already on the house's list and ticked **Purchased** (same item and size) keeps its tick. What **Replace** removed is kept in the account's records.

Updating what you imported before

The **Row Ref** column at the end of every sheet is your own reference for the row — a code from your old spreadsheet, or something like *H-12* or *T-12-1*. It is optional. Left blank, the row is added as usual. Give a row a Row Ref when you expect to send the same record again later with changes.

1. A Row Ref is used once per sheet, up to 100 characters. The same one twice on a sheet is an error.
2. When a later file carries a Row Ref your community already has, that row **updates** the record instead of adding another: filled cells replace what is stored, blank cells keep it, and photos are only ever added. A new address on a **Properties** row renames the house.
3. A row that matches a record already on file that has no Row Ref yet — the same house, repair, tenant and so on — gives that record its Row Ref and updates it the same way. This is how records imported before Row Refs existed, or typed in by hand, pick one up.
4. Before you confirm, a blue box headed, for example, **2 rows will update existing records** counts them, sheet by sheet, and lists each one: its **Sheet**, **Row**, **Row Ref**, the **Record** it changes (shown as *what is on file → what the row makes it* when the name changes) and **What happens** — *Updates it*, or *Takes reference H-103 and updates it* for a record taking its first Row Ref.

2 rows will update existing records

These rows carry a Row Ref that names a record on file, so they change that record instead of adding a new one: filled cells replace what is stored, blank cells keep it, and photos are only ever added. Nothing changes until you confirm.

2 of them are records already on file without a Row Ref: each takes the reference on its row.

Properties: 2 rows will update existing records

Sheet	Row	Row Ref	Record	What happens
Properties	4	`H-103`	103 Riverside Dr	Takes reference H-103 and updates it
Properties	5	`H-105`	105 Riverside Dr	Takes reference H-105 and updates it

Two houses already on file take their Row Refs. Nothing changes until you confirm.

> A Row Ref cannot move a record to another house, and it cannot give one house another house's address; the preview names the row and says why. Two tenants with the same name at one house need a Row Ref each, so a later file can tell them apart. Renaming a house and adding a new house at its old address takes two uploads: the rename first, the new house in the next.

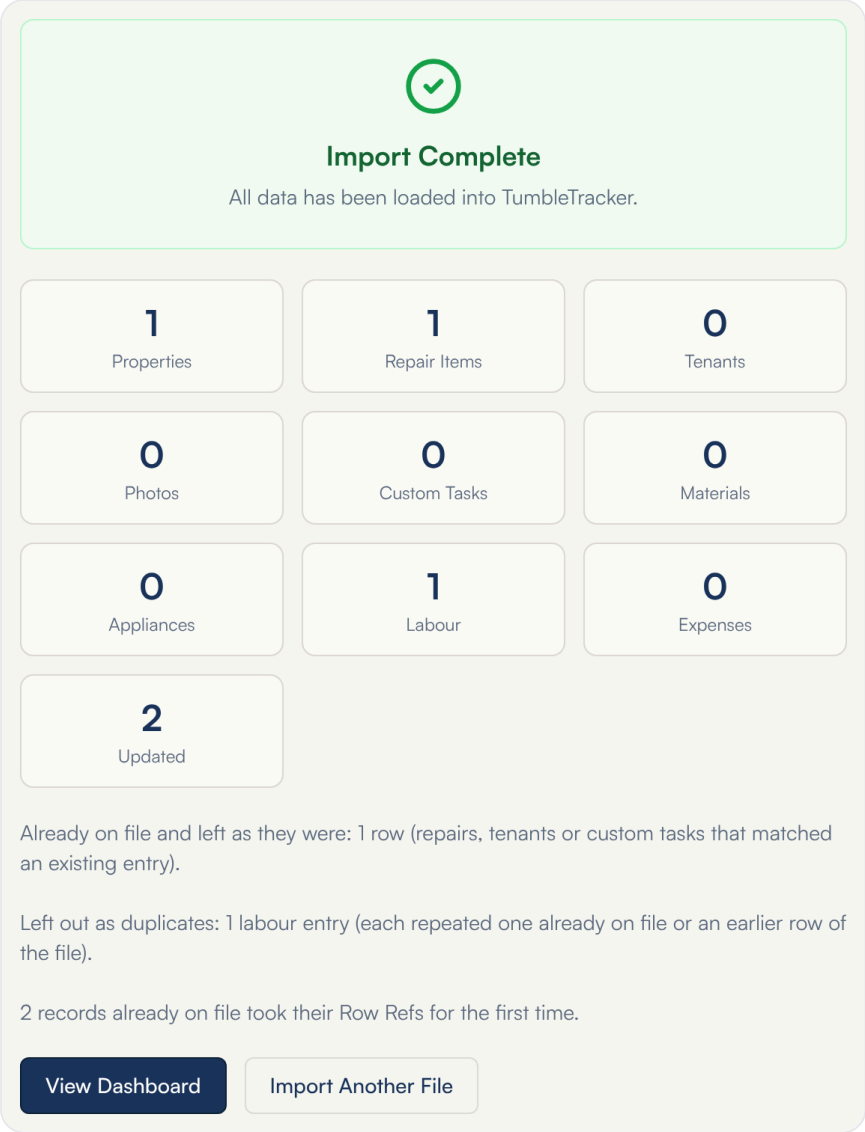
Fixing rejected rows

1. Each error names the sheet and the row, then the problem — for example *Repair Items row 7: "Deck Railing": Severity must be 1—5 (got: "6")*. The row number is the row number in your spreadsheet, counting the heading rows and any blank or example rows.
2. The usual causes: a required column left empty (the template's **Instructions** sheet says the same — a missing required field stops the import until it is fixed), **Dangerous?** not exactly *Yes* or *No*, a **Severity** outside 1 to 5, a date or an amount that is not one, or an address on **Repair Items**, **Tenants**, **Photos** or **Custom Maintenance Items** that is not on the **Properties** sheet.
3. Fix the rows in your spreadsheet and save it. Click **Upload Different File** and upload it again. The preview is checked afresh.

> A preview waits for at least an hour. If you leave it longer, **Confirm Import** answers *This import preview has expired. Upload the file again.* — upload the file again. **Confirm Import** also checks that it would still do exactly what the preview showed. If someone changed the community's records in between — added a repair the file also has, deleted a house it names — nothing is imported and it says *The records in this community changed since the preview … Upload the file again to see what it will do now.*

Import Complete

1. When the preview looks right, click **Confirm Import**. The screen shows **Import Complete** and a tile for how many of each kind were added. **Updated** counts the records a Row Ref changed.
2. Sentences under the tiles say what was left alone: *Already on file and left as they were* (repairs, tenants or custom tasks that matched one already there), *Left out as duplicates* (appliances, labour entries and expenses), how many records *took their Row Refs for the first time*, rows whose Row Ref *matched a record that already held those values — nothing needed to change*, and photos that were skipped.
3. Click **View Dashboard** to see your houses, or **Import Another File** to start again.



Done: what was added, what was updated, and what was left alone. (A fictional example community.)

Check before you import a file a second time. Without a Row Ref, a house already in TumbleTracker is reused, not doubled — but its heating, filter and notes are not updated from the sheet. A repair (same item and issue), a tenant (same name) or a custom task (same task) that is already on the house is left as it is. An appliance, labour entry or expense that repeats one already on the house is left out. A photo already on its repair is not added again, whatever its file name. Materials in **Add** mode have no such check: import the same materials twice and you get them twice. To change records you imported before, use **Row Ref**.

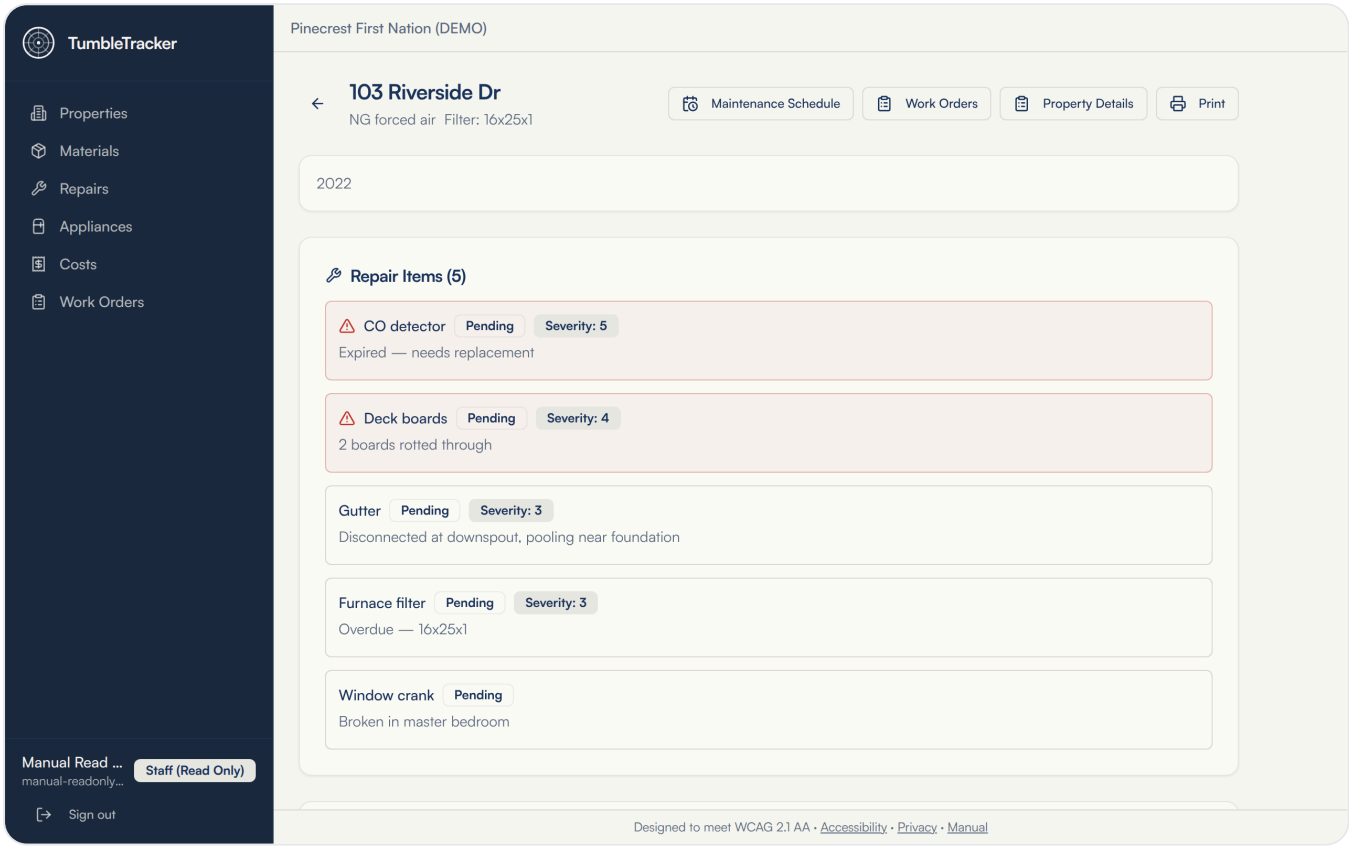
Where to find it: Import Data in the menu.

13. If you are read-only

You may need to see the houses without changing them — as a manager, a council member or an inspector. For that, your administrator gives you **Staff (Read Only)** access. This chapter is for you: what the screens look like, and what to do when you need to change something.

How to tell

Look at the bottom of the menu. Beside your name is a badge with your role: **Staff (Full)** for full access, **Staff (Read Only)** for read-only access.



The same house, read-only: every record, none of the buttons that change one.

What you can see

Everything. Every house, repair, material, appliance, maintenance schedule, work order, photo, tenant and cost is on your screen, the same as for anyone else in your community. The **Repairs**, **Materials**, **Appliances**, **Costs** and **Work Orders** screens in the menu work in full, with every search and filter.

You can print too: the property report, a work order, the materials sheets, and the costs report and its spreadsheet download.

What you cannot do

The buttons that add, change or delete are not on your screen. There is no **Add Property**, and on a house there is no **Edit**, **Add Photos**, **Add Repair**, **Add Material**, **Add Appliance**, **Add labour**, **Add expense** or **Add Tenant**. A repair shows its status as a label instead of a dropdown, and the **Purchased** tick on a material is greyed out. **Property Details** opens for reading, with a **Close** button instead of **Save**.

On the **Maintenance Schedule** there is no **+ Add item**, **Mark done** or **Remove**, and no **Add photo** camera button. On **Work Orders** there is no **+ Create Work Order** or delete bin, and a work order's status is a label, not a dropdown.

Import Data is not in your menu. If you open the import screen by its address, it says *Your account is read-only, so it cannot import data. Ask your community administrator to run the import, or to change your role.*

> If anything you try does reach the point of saving, it stops with *Your account can view but not change anything. Ask your administrator if something needs changing.*

Getting more access

Your community's administrator decides who has which role, and can change yours in **Manage Users**. It takes effect the next time your screen loads. If you do not know who your administrator is, email support@tumbletracker.ca and we will put you in touch with them.

Where to find it: your role badge is at the bottom of the menu, beside your name.

14. Screen reference

Every screen in TumbleTracker, in the order of the menu, with every button on it: what it does and who sees it. **All** means Admin, Staff (Full) and Staff (Read Only) alike; **Staff** in the *Who* column means Staff (Full). The chapter that explains a screen in full is named under its heading.

Properties

The first screen after you sign in. **Properties** in the menu. Chapter 3.

BUTTON	WHAT IT DOES	WHO
Add Property	Opens **Add New Property**	Admin • Staff
Properties card	Counts the houses on your list (not a link)	All
Dangerous card	Opens **Repairs** showing open dangerous items	All
Pending Repairs card	Opens **Repairs** showing Pending items	All
Total Repairs card	Opens **Repairs** showing every item	All
Maintenance Due card	Counts jobs overdue or due in the next 14 days (not a link)	All
Warranties Expiring card	Opens **Appliances** showing warranties expiring soon	All
A line under **Maintenance Due**	Opens that house's **Maintenance Schedule**	All
Search properties...	Filters the list by address as you type	All
A house	Opens the house's page	All
Photo count on a house	Opens the house straight at its photo gallery	All

Add New Property

Properties → **Add Property**. Chapter 3.

BUTTON	WHAT IT DOES	WHO
Back arrow	Returns to **Properties** without saving	Admin • Staff
Save Property	Saves the house and opens its page	Admin • Staff

BUTTON	WHAT IT DOES	WHO
Cancel	Returns to **Properties** without saving	Admin • Staff

A house's page

Properties → a house. Chapters 3 to 7 and 10.

BUTTON	WHAT IT DOES	WHO
Back arrow	Returns to **Properties**	All
Maintenance Schedule	Opens the house's maintenance schedule	All
Work Orders	Opens the house's work orders	All
Property Details	Opens the building record (read-only users get **Close**, not **Save**)	All
Edit	Changes the address, heating, filter size, wood stove and notes	Admin • Staff
Add Photos	Uploads photos to the house gallery	Admin • Staff
Print	Opens **Print Report** for the house	All
Repair Items: Add Repair	Logs a new repair	Admin • Staff
Repair: status dropdown	Sets Pending, In Progress, Deferred or Completed, saved at once	Admin • Staff
Repair: **Photo**	Attaches a photo to that repair	Admin • Staff
Repair: red bin	Deletes the repair after **Delete**	Admin • Staff
Materials: Print this house's materials	Opens **Print Materials** for this house	All
Materials: Add Material	Adds a material to the list	Admin • Staff
Material: **Purchased** tick	Marks it bought, saved at once	Admin • Staff
Material: wrench / red bin	Edits / deletes the row	Admin • Staff
Appliances: Add Appliance	Records an appliance and its warranty	Admin • Staff

BUTTON	WHAT IT DOES	WHO
An appliance row	Opens its details	All
Appliance: **Edit** (or **+ Are there warranties?**) / red bin	Edits / deletes the appliance	Admin · Staff
Appliance: **Upload receipt** / **remove**	Attaches / removes the warranty receipt	Admin · Staff
Appliance: **View receipt**	Opens the receipt	All
Costs: Add labour / **Add expense**	Logs a cost on the house	Admin · Staff
Cost: pencil / red bin	Edits / deletes the entry	Admin · Staff
Cost: paperclip / **Show all**	Opens the receipt / lists every entry past ten	All
Photos: Add Photos	Same as the button beside the address	Admin · Staff
A photo	Opens it full size	All
Photo viewer: red **Delete photo**	Deletes the open photo after **Delete**	Admin · Staff
Tenants / Residents: Add Tenant	Adds a tenant	Admin · Staff
Tenant: pencil / red bin	Edits / removes the tenant	Admin · Staff
Delete Property (foot of the page)	Deletes the house and everything under it	Admin

Maintenance Schedule

A house → **Maintenance Schedule**. Chapter 8.

BUTTON	WHAT IT DOES	WHO
Back arrow	Returns to the house	All
+ Add item	Adds a job from the standard list	Admin · Staff
Frequency dropdown on a row	Changes how often the job comes round, saved at once; **Next due** moves to match, counted from **Last done**	Admin · Staff
Mark done	Records the job done today and moves **Next due** on	Admin · Staff

BUTTON	WHAT IT DOES	WHO
Add photo (camera, under **Last done**)	Adds a photo to the latest **Mark done**; shown once a job has been marked done	Admin • Staff
Maintenance photo thumbnail / **Delete photo** in the viewer	Opens it full size / deletes it after **Delete**	All / Admin • Staff
Remove	Takes the job off the schedule after **Delete**	Admin • Staff
Custom tasks for this house: + Add custom task	Adds a job for this house only	Admin • Staff
Custom task: **Mark done** / **Remove**	Records it done today / removes it and its history	Admin • Staff

Work Orders (one house)

A house → **Work Orders**. Chapter 9.

BUTTON	WHAT IT DOES	WHO
Back arrow	Returns to the house	All
+ Create Work Order	Opens **New Work Order**; **Save & Print** saves it	Admin • Staff
Print on a row	Opens the work order sheet	All
Red bin on a row	Deletes the work order after **Delete**	Admin • Staff

Print Report

A house → **Print**. Chapter 11.

BUTTON	WHAT IT DOES	WHO
Back arrow	Returns to the house	All
Year box	Picks the year of the maintenance checklist	All
Section ticks	Put **Repairs**, **Appliances**, **Costs**, **Maintenance**, **Tenants**, **Photos**, **Property Details** in or out	All
Print	Opens your browser's print window; grey until every ticked section has loaded	All

Materials

Materials in the menu. Chapter 6.

BUTTON	WHAT IT DOES	WHO
Search item, type, or house...	Filters as you type	All
All houses	Narrows to one house	All
All / **Outstanding** / **Purchased**	Filters by whether it has been bought	All
Item type chips	Switch single item types on and off	All
By item / **By house**	Groups the list as a shopping list / a drop-off list	All
Print (**Print shopping list** with types chosen)	Opens **Print Materials** with the same filters	All

Print Materials

Materials → **Print**, or a house → **Print this house's materials**. Chapter 6.

BUTTON	WHAT IT DOES	WHO
Back arrow	Returns to **Materials**	All
Print	Opens your browser's print window	All

Repairs

Repairs in the menu. Chapter 5. For looking only; changes are made on the house.

BUTTON	WHAT IT DOES	WHO
Search house, item, issue, who...	Filters as you type	All
All houses	Narrows to one house	All
Status dropdown	**All statuses**, **Open (not Completed)**, **Pending**, **In Progress**, **Deferred**, **Completed**	All
Dangerous only	Shows only dangerous items; click again to switch off	All

BUTTON	WHAT IT DOES	WHO
A house name	Opens that house	All

Appliances

Appliances in the menu. Chapter 7. For looking only; changes are made on the house.

BUTTON	WHAT IT DOES	WHO
Search house, type, brand, model...	Filters as you type	All
All houses	Narrows to one house	All
Warranty dropdown	**All warranties**, **Expiring soon**, **Expired**, **Under warranty**, **No warranty on file**	All
Type chips	Switch single appliance types on and off	All
A house name	Opens that house	All

Costs

Costs in the menu. Chapter 10.

BUTTON	WHAT IT DOES	WHO
Community / **Property**	Reports on every house / on the house you choose	All
Period	**This month**, **Last month**, **This year**, **Last year**, **All time**	All
From / **To**	Your own dates (**Custom range**)	All
Print	Prints the report	All
Download spreadsheet	Saves the report as an Excel file	All
An address under **By property**	Opens that house	All

Work Orders (every house)

Work Orders in the menu. Chapter 9. New work orders start from a house.

BUTTON	WHAT IT DOES	WHO
Open / **All**	Shows only work orders still Issued or In Progress / every work order, Completed and Cancelled too	All
Status dropdown on a row	Sets Issued, In Progress, Completed or Cancelled, saved at once (read-only users see a label)	Admin • Staff
Print on a row	Opens the work order sheet	All

A work order sheet

Print on any work order, or **Save & Print**. Chapters 9 and 10.

BUTTON	WHAT IT DOES	WHO
Back	Returns to the house	All
Status dropdown beside **Print**	Sets Issued, In Progress, Completed or Cancelled, saved at once; the status and closed date print in the header (read-only users see a label)	Admin • Staff
Print	Prints the sheet (the buttons and costs card are left off)	All
Costs on: **Add labour** / **Add expense**	Logs a cost against this work order	Admin • Staff
Cost: pencil / red bin	Edits / deletes the entry	Admin • Staff

Import Data

Import Data in the menu. Chapter 12. Not in a read-only user's menu; opened by its address, the screen says the account is read-only and cannot import.

BUTTON	WHAT IT DOES	WHO
Download Template (.xlsx)	Saves the import template	Admin • Staff
Dashed drop box	Uploads a .xlsx or .zip and shows the preview	Admin • Staff
Blue **rows will update existing records** box	Lists the rows whose Row Ref changes a record on file (nothing to click)	Admin • Staff

BUTTON	WHAT IT DOES	WHO
Unmatched address choice	**Use existing**, **Create new property** or **Skip these rows**	Admin · Staff
Add / **Replace**	How imported materials meet each house's list	Admin · Staff
Upload Different File	Back to step 1; nothing is saved	Admin · Staff
Confirm Import	Saves everything in the preview	Admin · Staff
View Dashboard / **Import Another File**	After the import: to **Properties** / start again	Admin · Staff

On every screen

BUTTON	WHAT IT DOES	WHO
Skip to main content	Keyboard only: the first thing Tab reaches; jumps past the menu to the page	All
Open menu / **Close menu**	In a window narrower than 1024 pixels (a phone or tablet): the three-line button at the top left opens the menu; the × in it, a tap outside it or picking a screen closes it	All
Sign out	Signs you out (bottom of the menu)	All
Accessibility / **Privacy**	Open the accessibility statement / the privacy policy (foot of the screen)	All
Manual	Opens this manual in a new tab (foot of the screen)	All

When something cannot load

If a list or a page cannot be read from TumbleTracker — a dropped connection, say — it never shows up empty. In its place is a box saying *Couldn't load* and what, with a **Try again** button; a count on the **Properties** screen that could not be read shows a dash (**—**) instead of 0. *Not found* appears only when the thing really is gone. If **Try again** keeps failing, wait a minute or reload the page.

Need help? Email support@tumbletracker.ca.