



CAFM WAY USER GUIDE

CAFM Way Web App

The facility management workspace each company uses to run its buildings, teams, contractors, work orders, stores, finance and ERP link.

app.cafm-way.com · Last updated: 26 Sep 2026

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Getting started

This guide follows one company, **Oasis Facilities Management**, from its first sign-in to daily operations. Its account was created through the path described in the Platform Console guide. It manages **Oasis Business Park**: one area (North Campus), office towers A, B and C with floors and rooms, a visitor car park and a central garden.

Sign in

Who: any company user with web access (administrators, managers, supervisors, helpdesk, finance, procurement)

Where: `app.cafm-way.com`

- 1 Open `app.cafm-way.com`.
- 2 To change the language, use the language button in the top corner. It offers English, العربية, हिन्दी and اردو. Arabic and Urdu switch the whole screen to right-to-left.
- 3 Enter your email and password, then click **Sign In**. **Remember me** keeps you signed in on this browser.

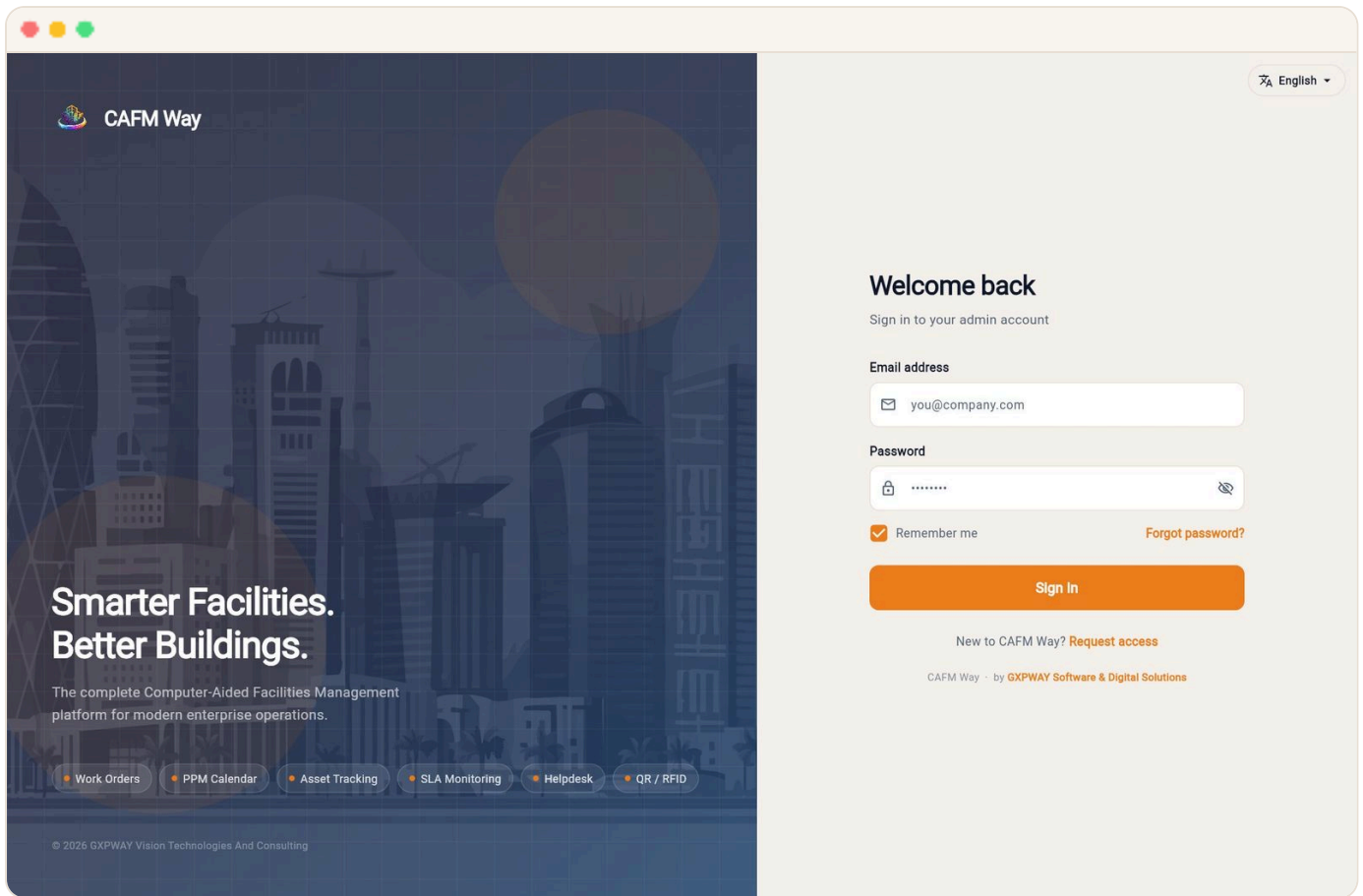


Figure 1 The sign-in page

NOTE

The first administrator's details arrive by email when CAFM activates the subscription. Everyone else gets an account from their administrator (see Add a user). **Request access** lets someone without an account ask to join.

Find your way around

The workspace has three fixed parts:

- **The sidebar** groups every screen by job. Each section folds and unfolds, and **Collapse** at the bottom narrows it to icons. You only see the screens your role allows.
- **The top bar** holds the search box, the language and dark-mode switches, notifications, settings and your account menu. Press **⌘K** (Ctrl+K on Windows) anywhere to search work orders, tickets, assets and locations.
- **The page** itself, with its own tabs and buttons.

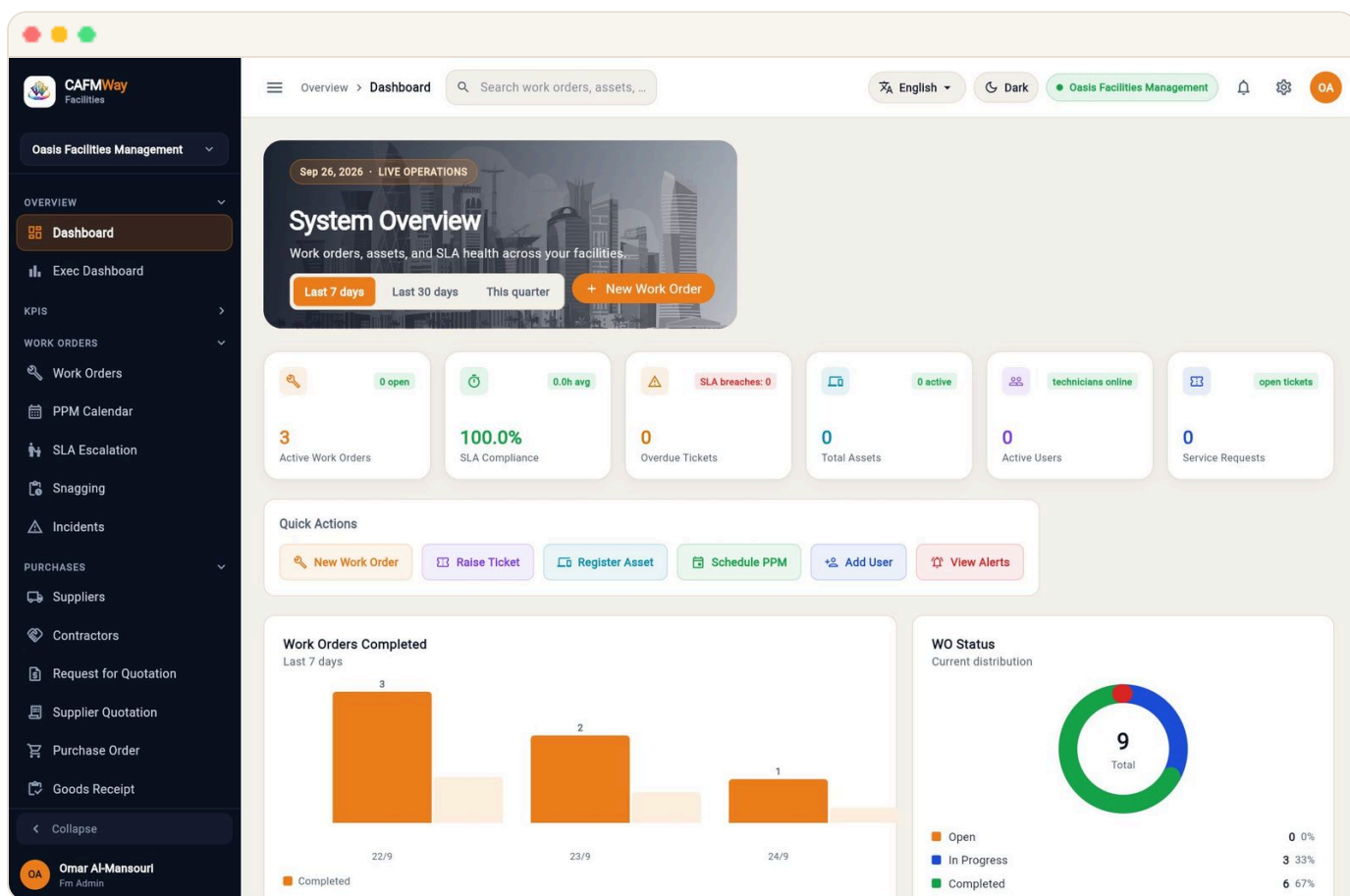


Figure 2 The dashboard and the sidebar

Sidebar section	What you do there	Covered in
OVERVIEW, KPIS	Dashboards and performance indicators	Dashboards & KPIs
WORK ORDERS	Work orders, PPM, SLA escalation, snagging, incidents	Work orders
PURCHASES	Suppliers, contractors, quotations, purchase orders, receipts, invoices, payments	Contractors, Purchasing & stores
ACCOUNTING & FINANCE	Ledger, budgets, fixed assets, tax, reports	Accounting
ASSETS & FACILITIES	Assets, locations, equipment, fleet	Locations & assets
INVENTORY	Items, warehouses, stock	Purchasing & stores
HEALTH & SAFETY	Permits, risk, checklists, observations, training, PPE	Health & safety
USERS	Users, roles, shifts, rosters, leave, organisation & SLA	Organisation & users
WORKPLACE	Space booking, waste, documents	Workplace
SYSTEM	Notifications, messages, settings, branding, integration, audit, subscription	ERP integration, Subscription

Recommended setup order

A new company already has a lot in place on day one: the facility hierarchy it registered, a standard department tree, work categories, SLA calendars, a priority matrix, a chart of accounts and the administrator's account. To be ready for work orders, complete these steps in order:

- 1 Organisation:** review departments and work categories, and add what is missing (Organisation & SLA).
- 2 People:** create users for supervisors, technicians, the helpdesk, finance and requestors (Users).
- 3 Places and equipment:** check the location tree, print QR labels and register assets (Locations, Assets).
- 4 Contractors:** add contractor companies, their contracts and their users (Contractors).
- 5 Stores and finance:** items, warehouses, suppliers and accounting settings (Purchasing & stores, Accounting).
- 6 Integration:** connect your ERP if you use one (ERP integration).

After that, requests and work orders can flow: Work orders, plus the Technician app and Requestor app guides.

Organisation and users

Set up who does the work and how work is classified. Most of this is ready-made for a new company; you review it and add what is specific to you.

Organisation & SLA at a glance

Who: FM administrators (needs the *manage permissions* right)

Where: USERS → **Organisation & SLA**

The page has six tabs, with a count on each:

Tab	Holds	Used by
Departments	The department tree, from the whole FM organisation down to leaf teams (HVAC, Electrical...)	Users belong to a department; teams own work categories
Job Ladder	Job levels and seats per department	Job titles when adding users
Classification	Work categories and sub-categories ("works")	Every ticket and work order is classified by these
Standard Tasks	A library of standard jobs, with permit flags	Linked to sub-categories and PPM
SLA Calendars	Working calendars and shift windows	SLA time counting
Priority Matrix	Priority = impact × urgency, and the SLA target per priority	Work-order priority and deadlines

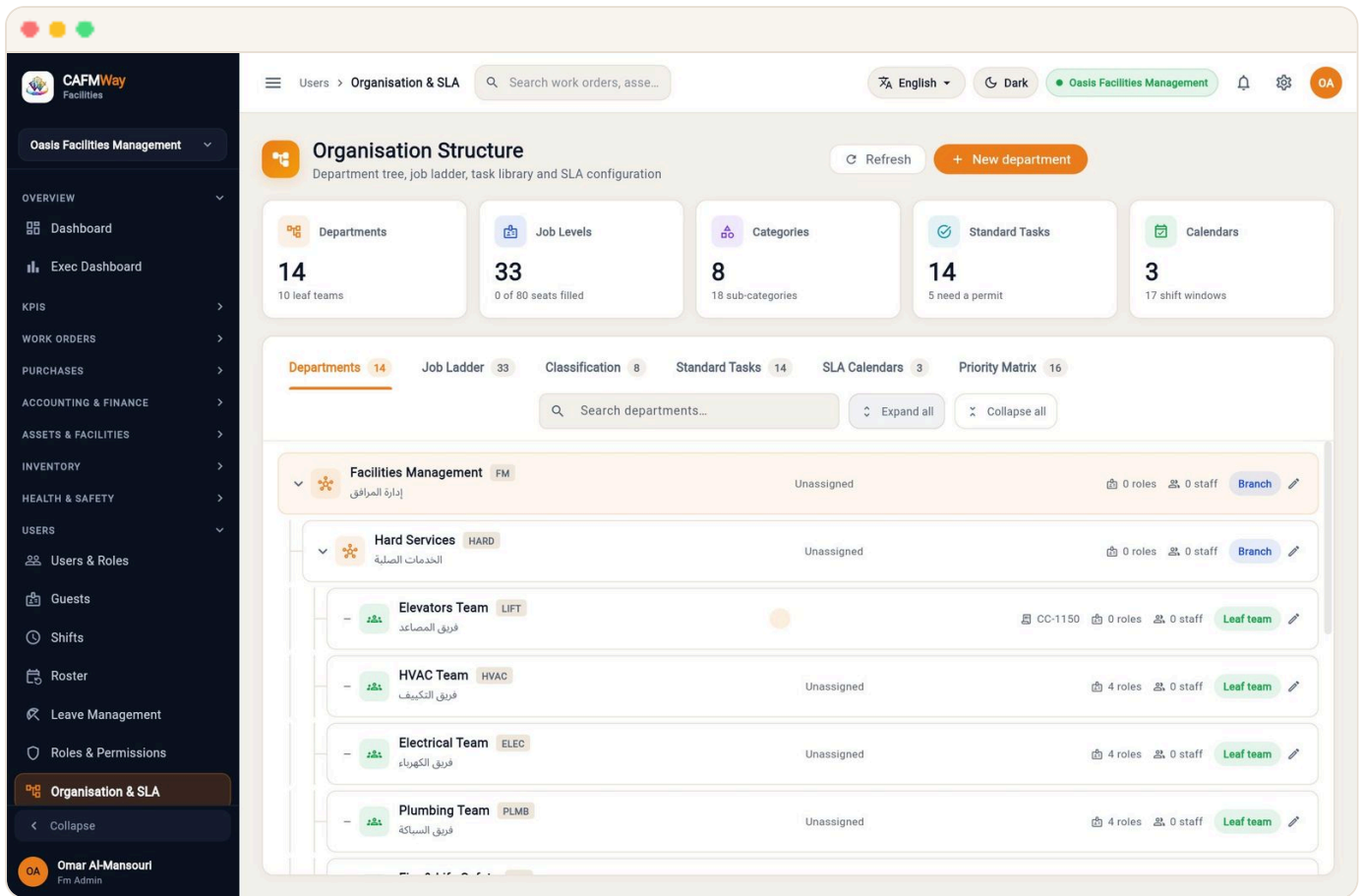


Figure 3 The department tree with the new Elevators Team under Hard Services

Add a department

- 1 On the **Departments** tab, click **New department**.
- 2 Choose the **parent** department. Choosing *Root department* creates a new top-level branch.
- 3 Enter a short **code** (for example `LIFT`), the English and Arabic names, and the **cost centre** used for accounting.
- 4 Optionally pick the department **manager**.
- 5 Click **Create department**.

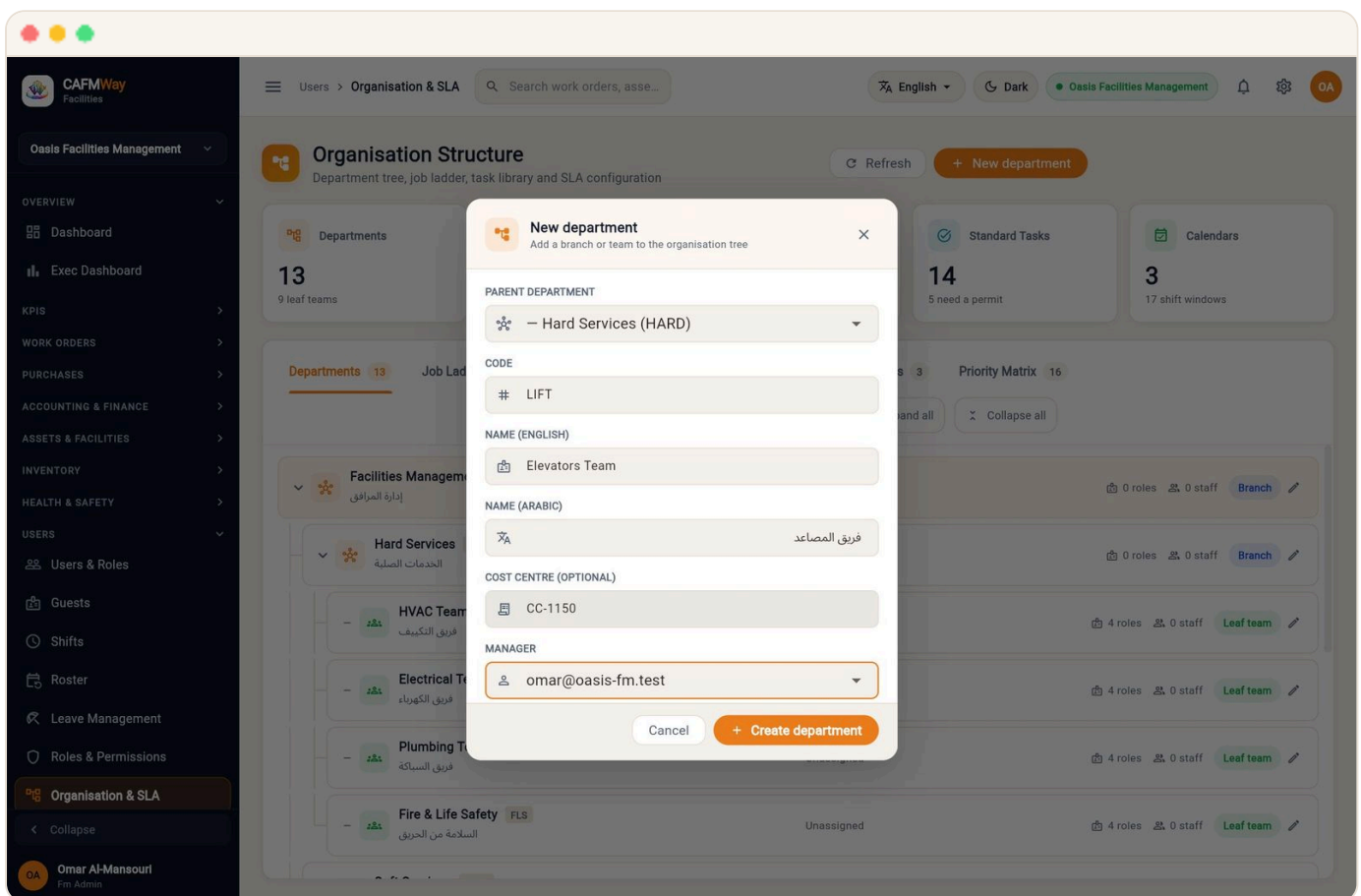


Figure 4 Creating the Elevators Team under Hard Services

The tree shows each department as a *Branch* (it has sub-departments) or a *Leaf team* (people and work sit here), with its role and staff counts. Use **Expand all** / **Collapse all** and the search box to find a team. Click the pencil on a row to edit it.

BUSINESS RULE

Codes must be unique under the same parent. The tree has a maximum depth; to classify work more finely, use categories rather than deeper departments.

Add work categories ("works")

Work categories answer *what kind of work is this?* Each category belongs to a department. That department's team receives the work, unless a contractor's contract covers the category (see Contractors).

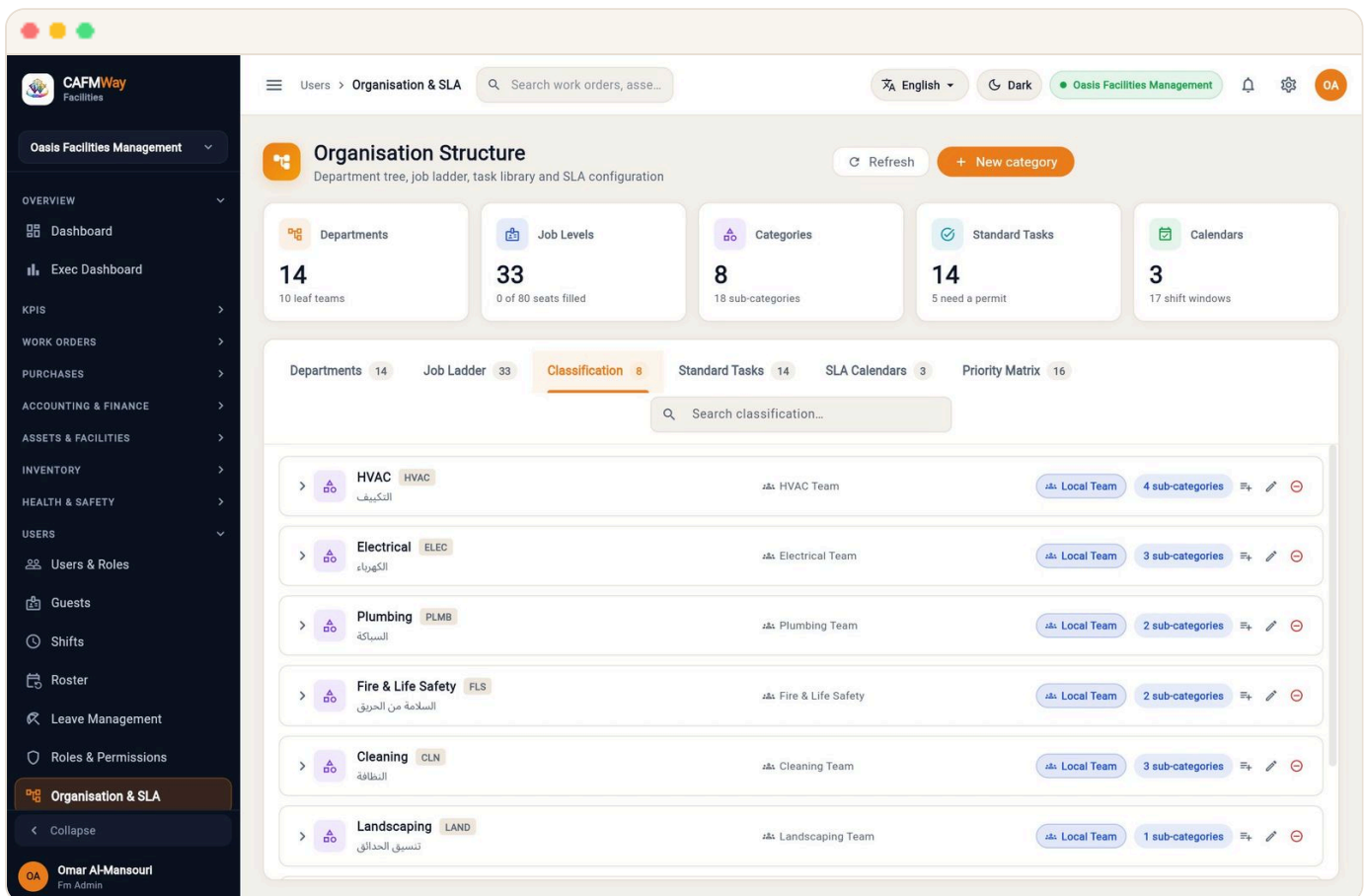


Figure 5 Work categories, each with its owning team and who executes it

Add a category

- 1 On the **Classification** tab, click **New category**.
- 2 Choose the owning **department**, enter a **code** and the English and Arabic names.
- 3 Leave the executor on **Local Team**. When a contractor's contract covers the category, the system routes the work to the contractor automatically (see Route work to the contractor).
- 4 Click **Create category**.

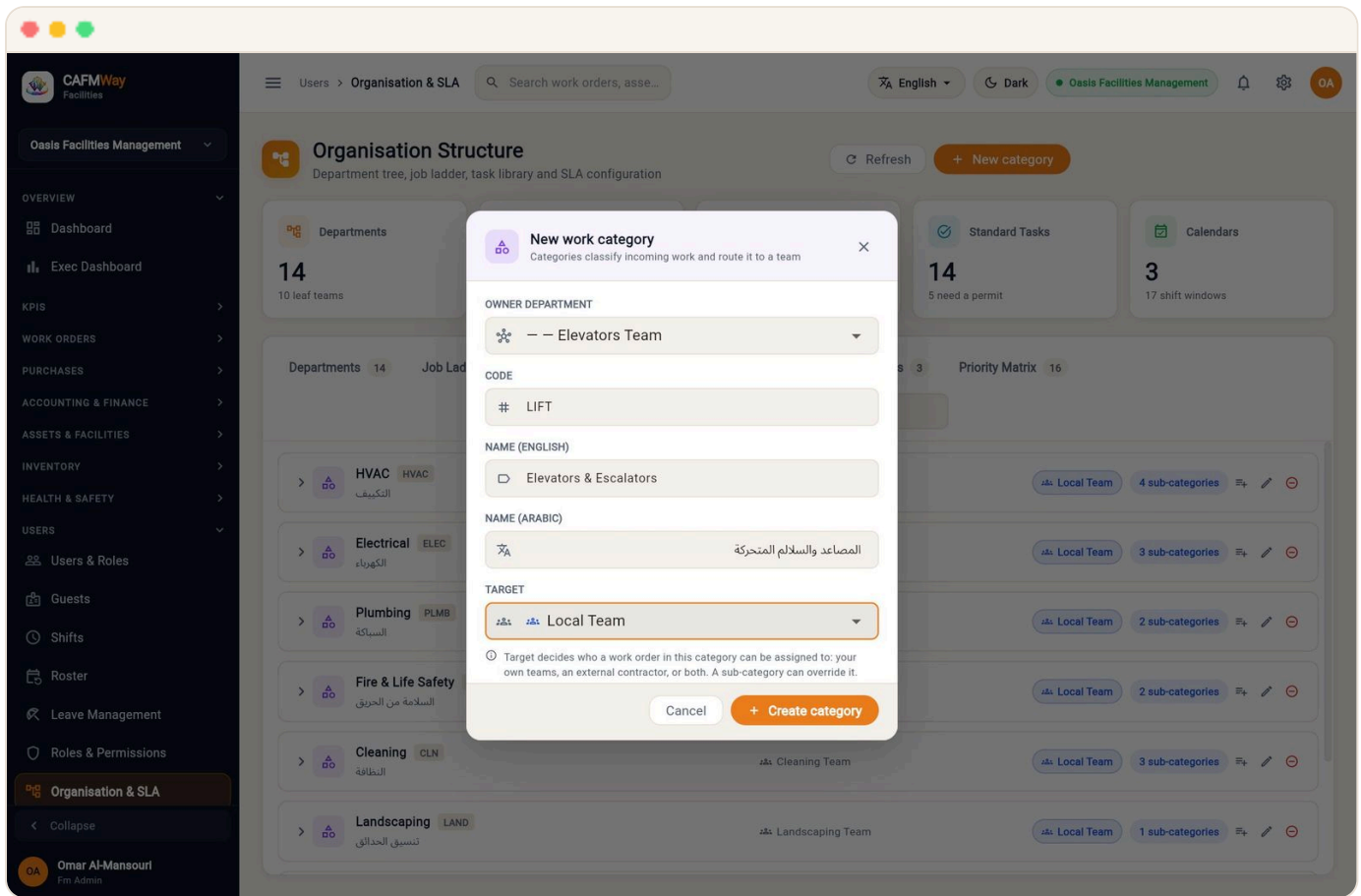


Figure 6 A new category: Elevators & Escalators, owned by the Elevators Team

Add sub-categories. Sub-categories are the level requesters and dispatchers actually pick, such as *Elevator breakdown*.

- 1 Click the **Add sub-category** icon on the category's row.
- 2 Enter a code and the English and Arabic names.
- 3 Set the **default urgency** (U1 is the most urgent) and the **minimum grade** of technician allowed to do the job.
- 4 Optionally link a **standard task**, and switch on **Requires an asset** or **Requires a permit** when the job always needs one.
- 5 Click **Create sub-category**.

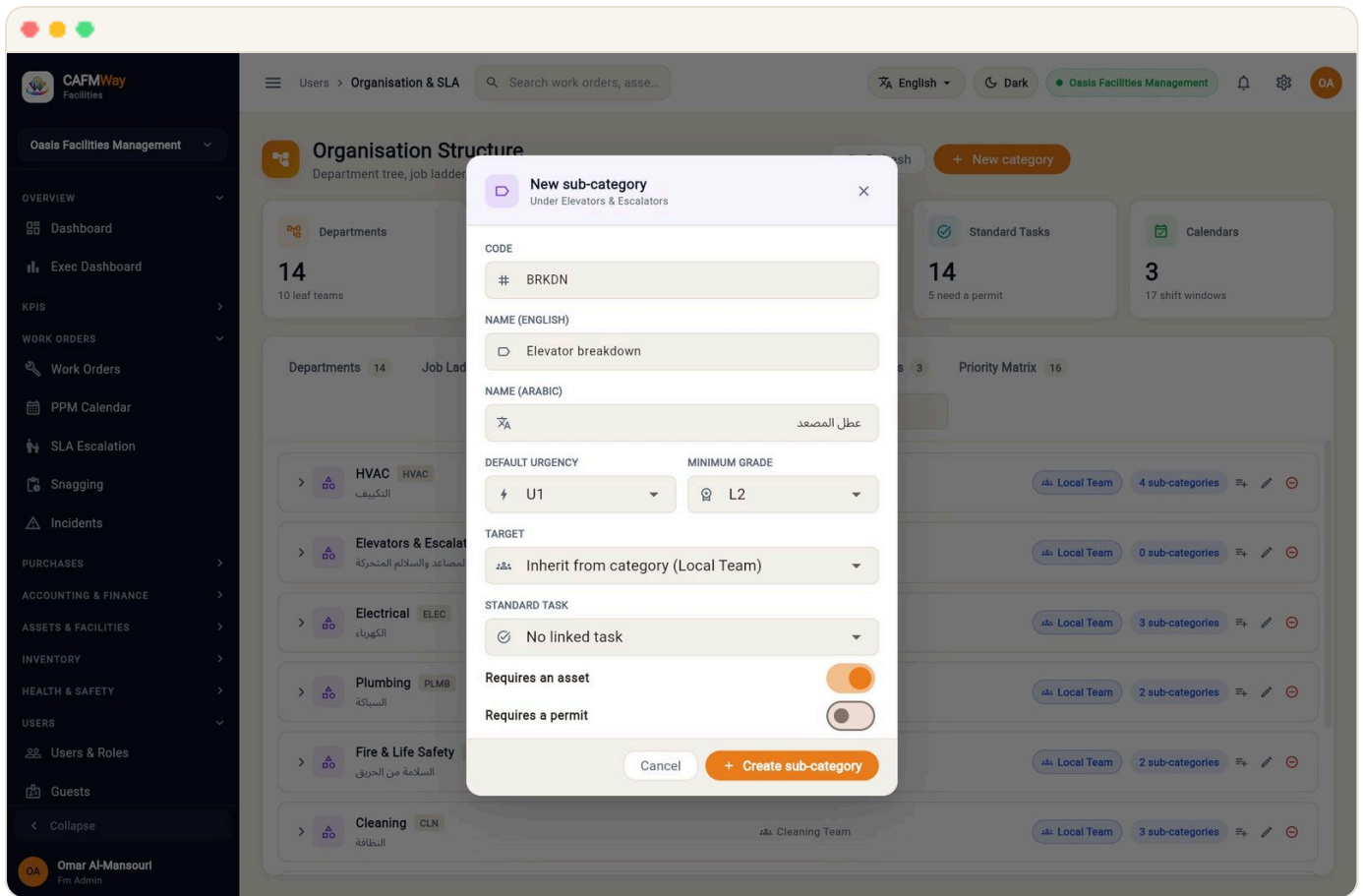


Figure 7 Elevator breakdown: urgency U1, asset required

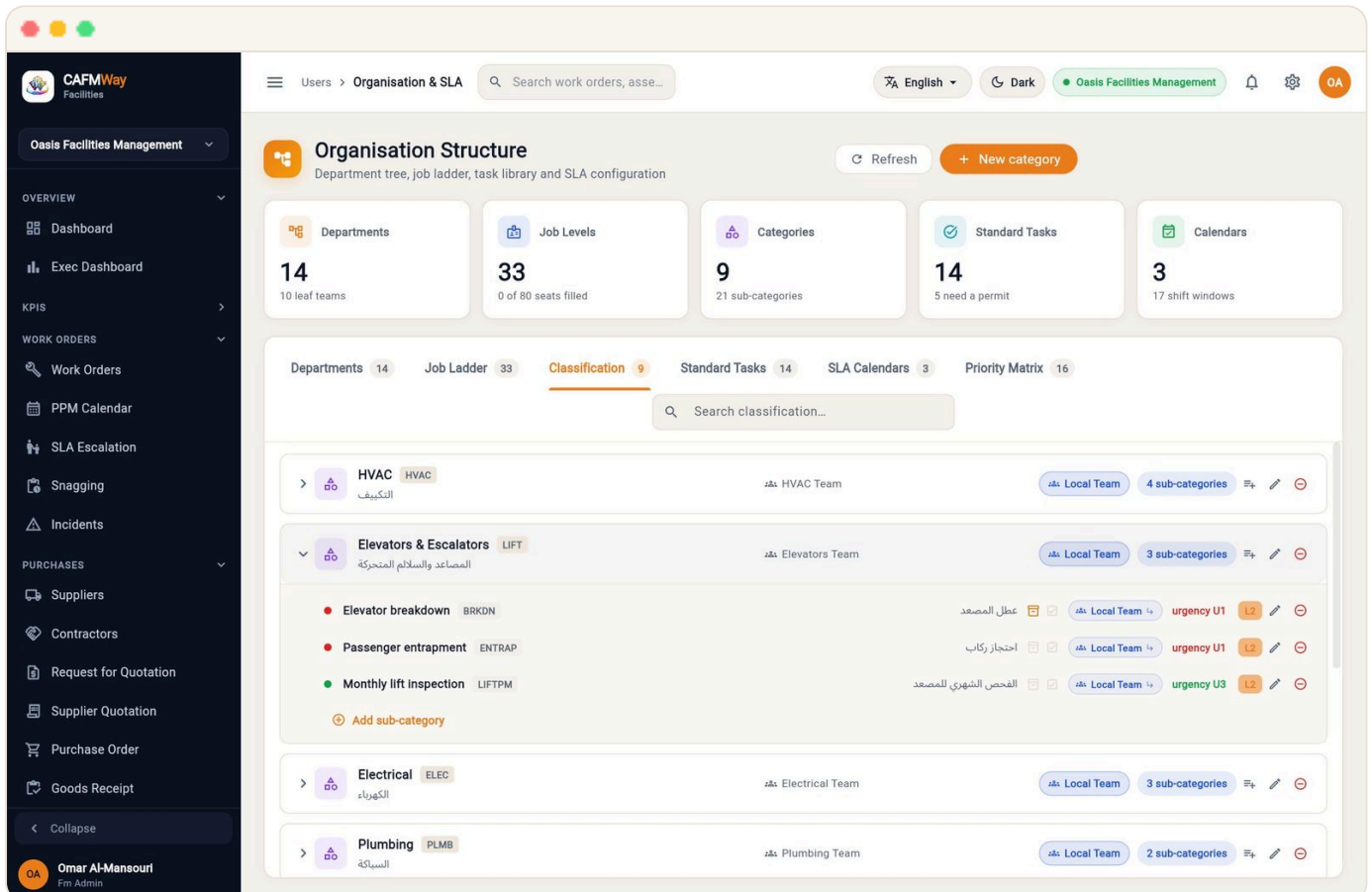


Figure 8 The new category expanded with its three sub-categories

EXAMPLE

Oasis added **Elevators & Escalators** with three sub-categories: *Elevator breakdown* (U1), *Passenger entrapment* (U1) and *Monthly lift inspection* (U3). Once Lift Tech Qatar's contract covered this category (see Route work to the contractor), lift work started going to the contractor instead of the in-house team.

Job ladder, standard tasks, SLA calendars and the priority matrix

These tabs come pre-filled and usually need only small changes.

- **Job Ladder:** job levels per department and how many seats each has. The job titles offered when you add a user come from here.
- **Standard Tasks:** reusable job definitions, such as *Filter replacement*, with an indication of which ones need a permit to work.
- **SLA Calendars:** the working hours and shift windows SLA clocks run against.
- **Priority Matrix:** how *impact* (how much of the site is affected) and *urgency* (how fast it gets worse) combine into a priority, P1 (critical) to P4 (low), and therefore the SLA target. Below the matrix, **SLA pause reasons** list the states in which the SLA clock stops.

The screenshot displays the CAFMWay Facilities web application interface. The left sidebar contains navigation menus for Overview, KPIs, Work Orders, Purchases, and a user profile for Omar Al-Mansouri. The main content area is titled 'Organisation Structure' and shows a summary of various configuration items: 14 Departments, 33 Job Levels, 9 Categories, 14 Standard Tasks, and 3 Calendars. Below this, a tabbed interface allows switching between different views, with 'Job Ladder' currently selected. The 'Job Ladder' view shows a search bar and two team configurations: HVAC Team and Electrical Team. Each team has a progress bar indicating staffing levels (0/10) and a list of job levels with their respective ranks and seat counts.

Team	Job Level	Rank	Seats	Grade
HVAC Team	Supervisor (مشرف)	rank 10	0 of 1 seats	L0 grade
	First Technician (فني أول)	rank 20	0 of 2 seats	L1 grade
	Technician (فني)	rank 30	0 of 4 seats	L2 grade
	Helper (مساعد)	rank 40	0 of 3 seats	L3 grade
Electrical Team	Supervisor (مشرف)	rank 10	0 of 1 seats	L0 grade
	First Technician (فني أول)	rank 20	0 of 2 seats	L1 grade

Figure 9 Job ladder

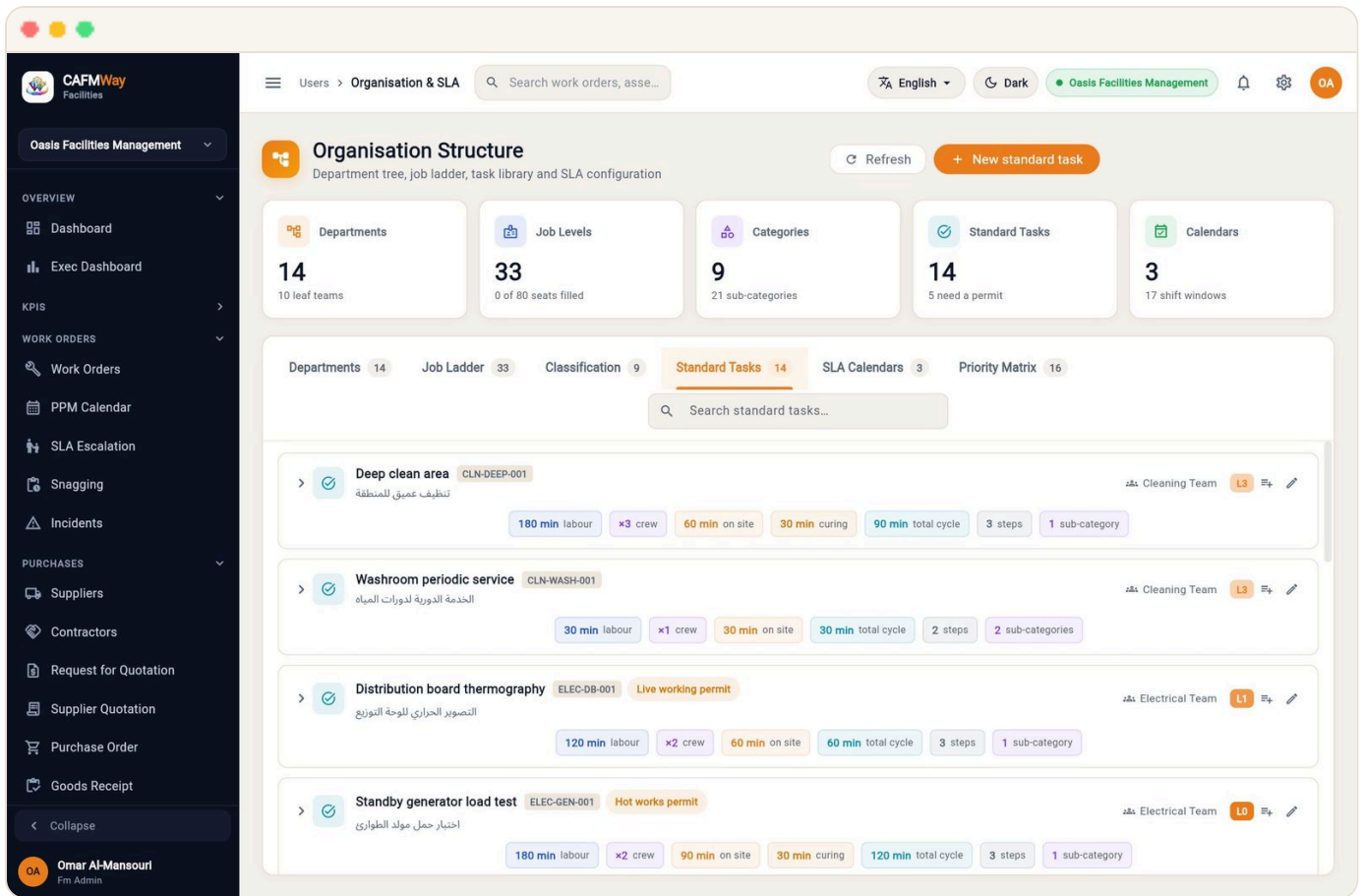


Figure 10 Standard tasks

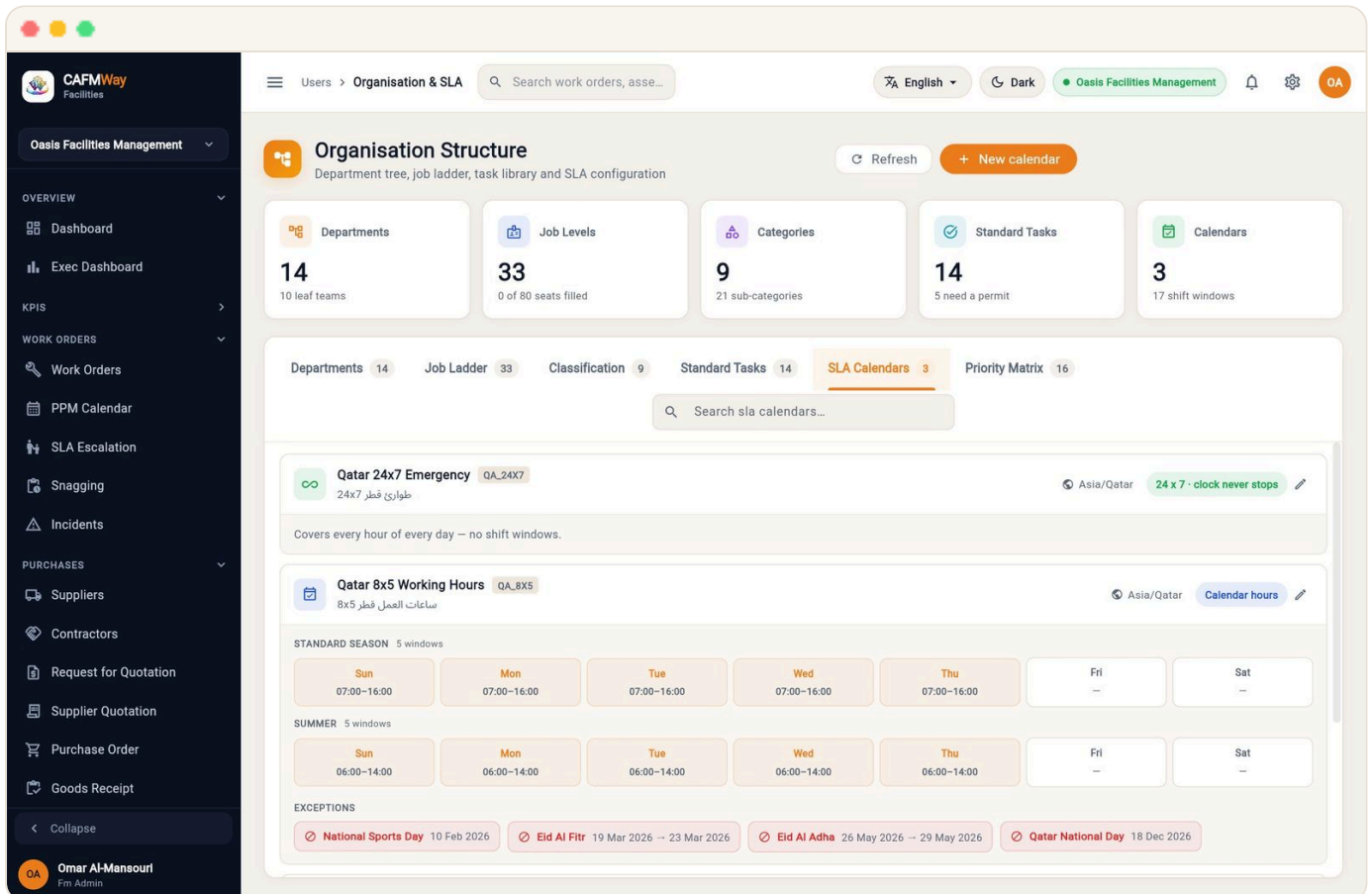


Figure 11 SLA calendars

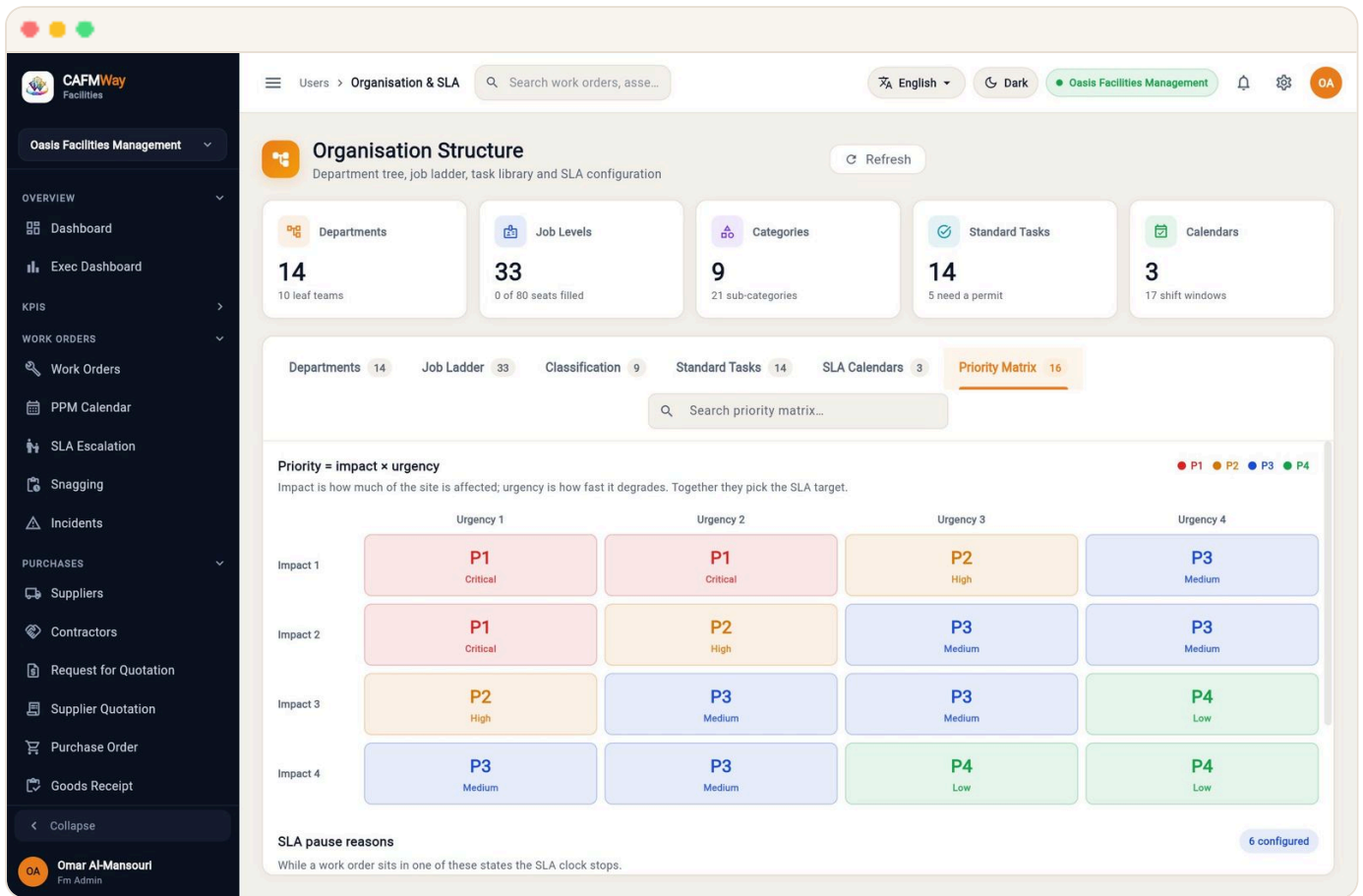


Figure 12 Priority matrix: impact × urgency

Users

Who: FM administrators
Where: USERS → Users & Roles

The list shows every account in the company with its role, department, status, last sign-in and two-factor state. The tiles at the top count all, active and inactive users and the roles in use. Filter by name, role or status, or click a role chip (for example **Technician**) to show only that role.

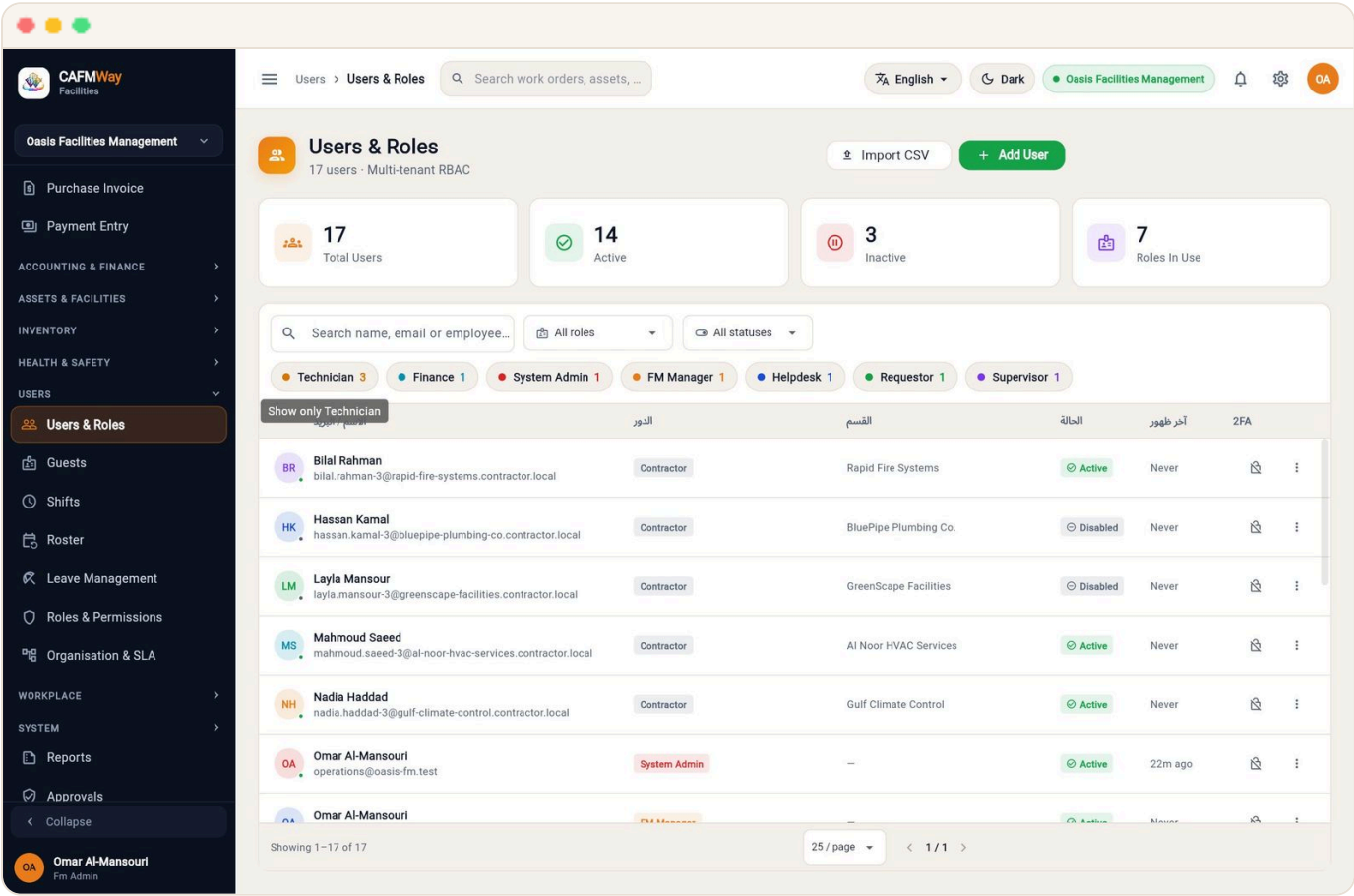


Figure 13 All users, including the contractor accounts

Users & Roles
3 users · Multi-tenant RBAC

3 Total Users 14 Active 3 Inactive 7 Roles In Use

Search name, email or employee... **Technician (3)** All statuses Clear

Technician 3 Finance 1 System Admin 1 FM Manager 1 Helpdesk 1 Requestor 1 Supervisor 1

الاسم / البريد	الدور	القسم	الحالة	آخر ظهور	2FA
خالد الكولري khalid@oasis-fm.test	Technician	HVAC Team	Active	Never	
فيصل الهاجري faisal@oasis-fm.test	Technician	Electrical Team	Active	Never	
يوسف إبراهيم yousef@oasis-fm.test	Technician	Elevators Team	Active	Never	

Showing 1–3 of 3 25 / page < 1 / 1 >

Figure 14 Filtered to technicians

NOTE

Contractor responsible persons also appear here with the role *Contractor*. They are created from the contractor's page (see Contractor users), and they count toward your user seats.

Add a user

1 Click **Add User**. A three-step form opens.

2 **Identity:**

- Enter the full name, phone, email (used to sign in), and a password twice.
- Choose the **Department**, then a **Job Title** from that department's job ladder.
- For technicians, add at least one **routing skill**: pick a work category (and optionally a sub-category), then click **Add this skill**. Routing skills decide which jobs the system suggests for this person.

The screenshot displays the 'Add New User' modal in the CAFMWay web application. The modal is titled 'Add New User' and shows 'Khalid Al-Kuwari - Technician' as the user being added. It is divided into three steps: 1. Identity, 2. Role & Access, and 3. Notifications. The 'Identity' step is currently active. It contains the following fields: Email (khalid.k@oasis-fm.test), Password, Confirm Password, Department (HVAC Team - HVAC - Routing), Job Title (Select job title), and Routing skills (Category). There is a note stating 'No job levels defined for this department'. At the bottom, there is a 'Notes (optional)' field and a 'Continue' button. The background shows the 'Users & Roles' management interface with a list of users and a sidebar with various system modules.

Figure 15 Step 1: identity, department and routing skills

3 **Role & Access:** choose the system role and the account status (Active, Inactive or Pending).

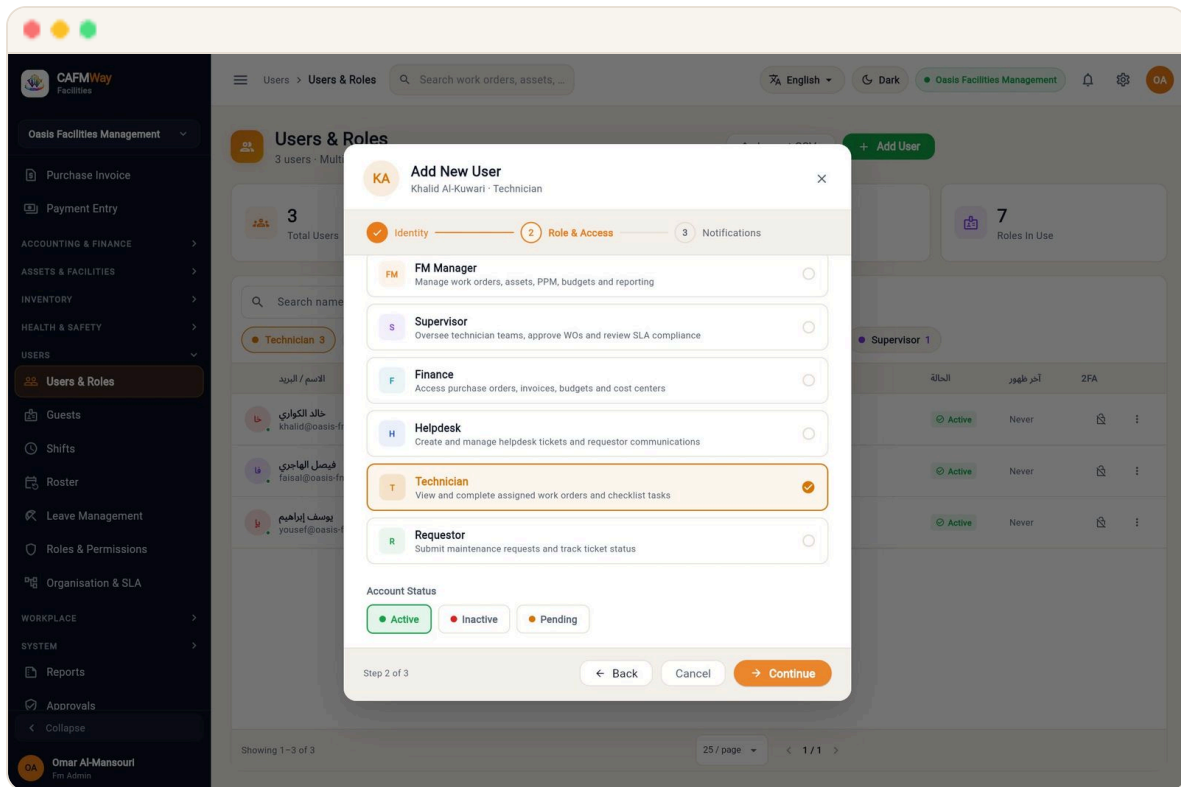


Figure 16 Step 2: role

Role	Typical user	Can
System Admin	IT / owner	Everything, including settings and permissions
FM Manager	Facilities manager	Work orders, assets, PPM, budgets, reports
Supervisor	Team leader	Oversee technicians, approve work orders, watch SLA
Finance	Accountant	Purchase orders, invoices, budgets, cost centres
Helpdesk	Call centre	Create tickets and talk to requesters
Technician	Field staff	See and complete assigned work (Technician app)
Requestor	Occupant / tenant staff	Raise and follow requests (Requestor app)

4

Notifications: check the summary and the onboarding options (welcome email, two-factor setup), then click **Create User**.

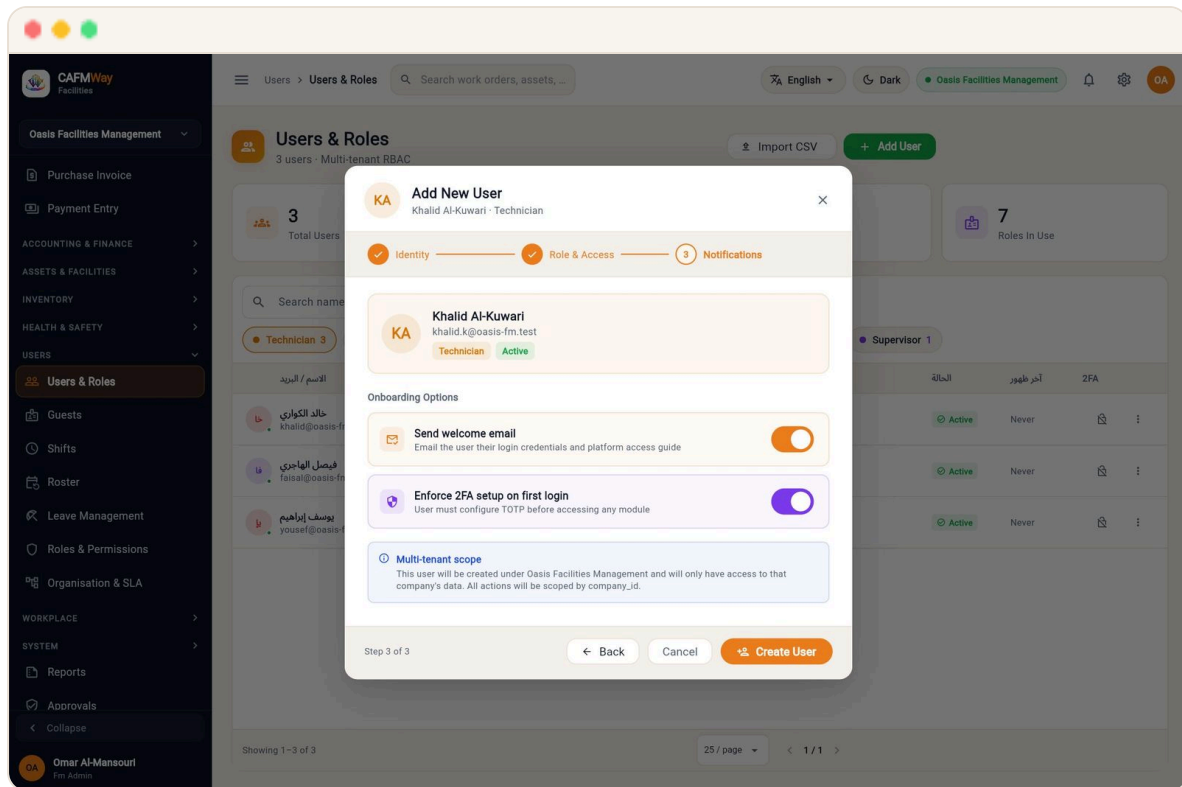


Figure 17 Step 3: onboarding options

The user gets the next employee number (for example EMP-0003). Technicians and requestors use their email or employee number to sign in to the mobile apps.

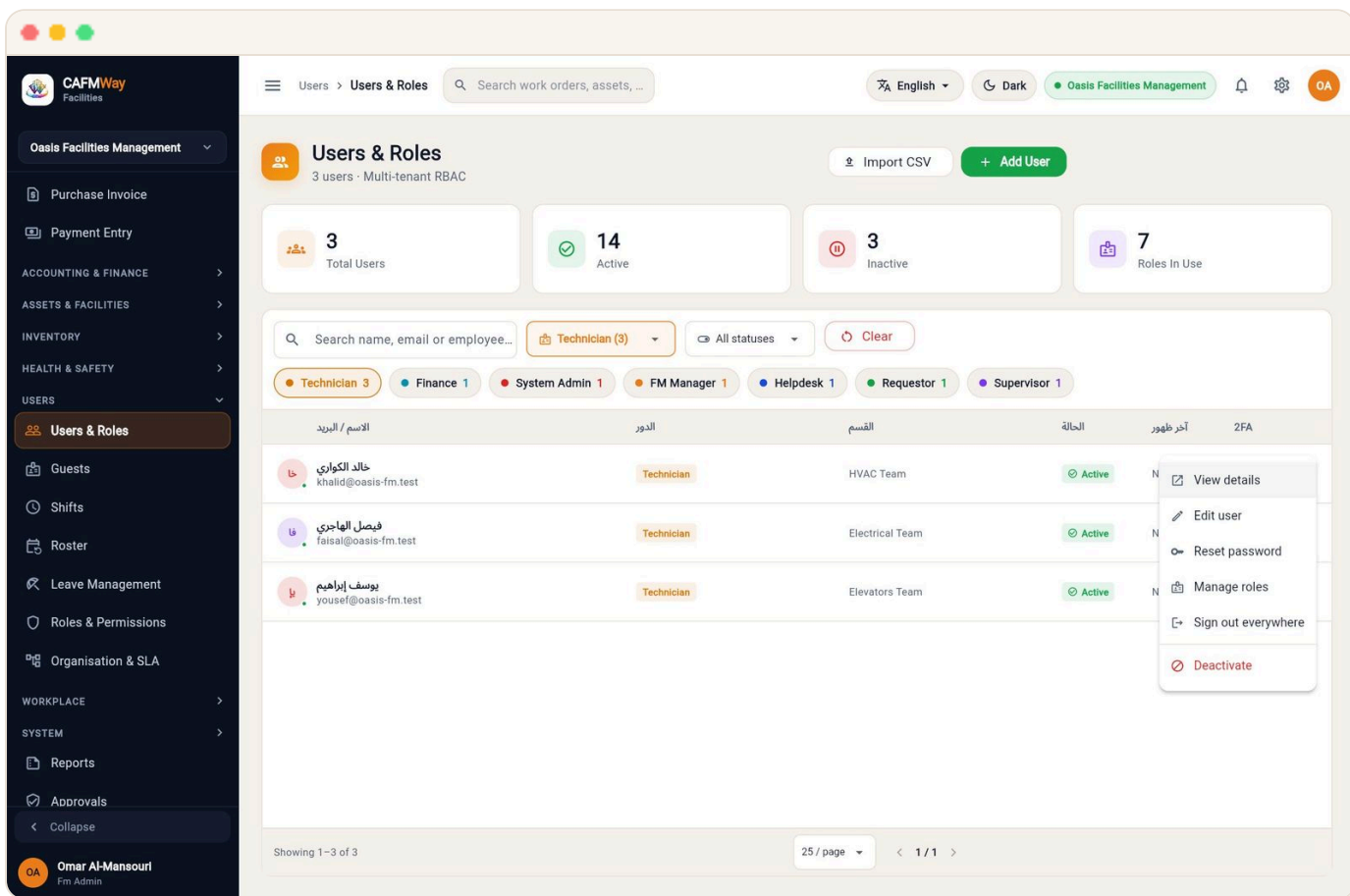
EXAMPLE

Oasis created its first team this way: خالد الكواري (HVAC technician, EMP-0003), مريم السليطي (supervisor), فيصل الهاجري (electrical technician), يوسف إبراهيم (lift technician), نورة الكعبي (helpdesk), حمد المري (requestor) and عائشة النعيمي (finance).

Manage a user

The  menu at the end of each row offers:

- View details
- Edit user
- Reset password
- Manage roles
- Sign out of all devices
- Deactivate



The screenshot displays the 'Users & Roles' management page in the CAFMWay web application. The interface includes a sidebar with navigation options, a top header with search and settings, and a main content area for managing users. A table lists three users, and a context menu is open for the first user, showing actions like View details, Edit user, Reset password, Manage roles, Sign out everywhere, and Deactivate.

الاسم / البريد	الدور	القسم	الحالة	آخر ظهور	2FA
خالد الكواري khalid@oasis-fm.test	Technician	HVAC Team	Active	N	
فيصل الهاجري faisal@oasis-fm.test	Technician	Electrical Team	Active	N	
يوسف إبراهيم yousef@oasis-fm.test	Technician	Elevators Team	Active	N	

Figure 18 The actions menu of a user

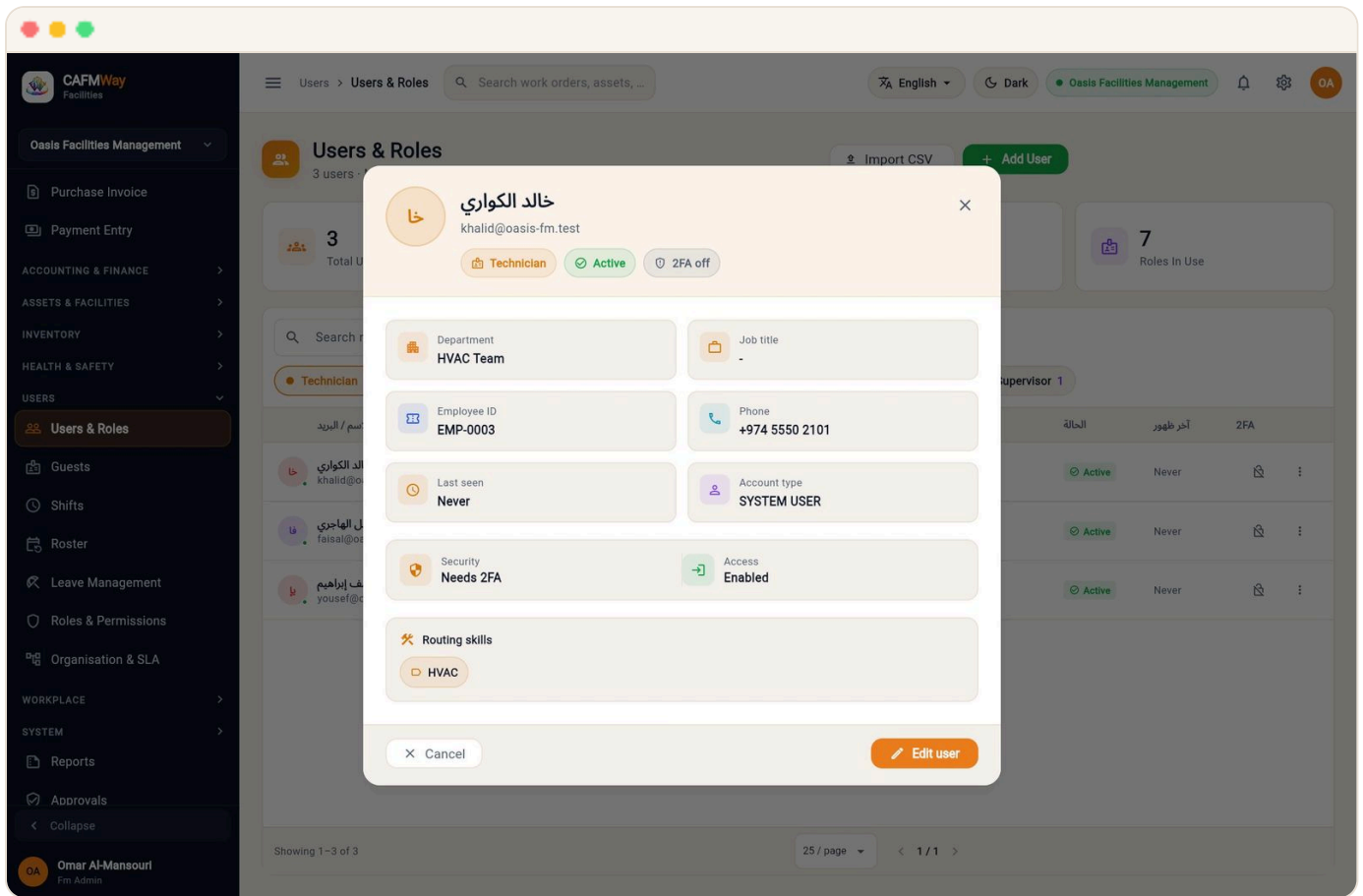


Figure 19 User details: department, employee number, security and routing skills

Roles and permissions

Who: FM administrators

Where: USERS → Roles & Permissions

The **Overview** tab links to every permission tool with a short explanation.

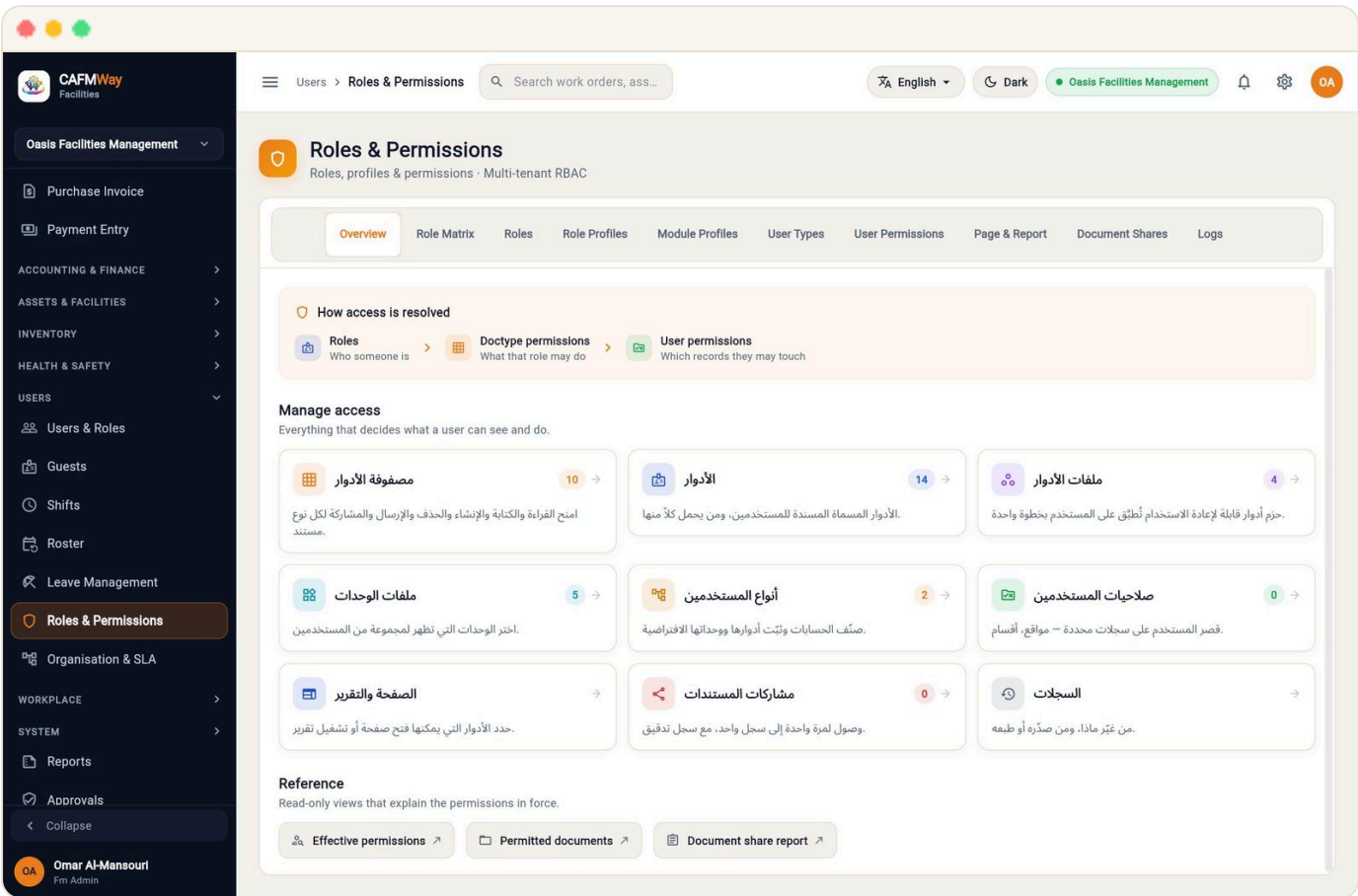


Figure 20 Roles & permissions overview

Tab	Use it to
Role Matrix	Tick what each role may do per document type: read, write, create, delete, submit, cancel, amend, report, import, export, print, email, share
Roles	See all 14 standard roles, their module and code; duplicate one to make your own
Role Profiles	Bundle roles to assign together
Module Profiles	Choose which modules a group of users can see: Full Access, Operations Only, Finance Only, Field Technician, Read-Only Auditor
User Types	Classify accounts, for example System User or Restricted User
User Permissions	Limit a user to specific records, for example one project
Page & Report	Choose which roles can open a page or report
Document Shares	One-off access to a single record
Logs	Who changed permissions, and who exported or printed what

The screenshot displays the 'Roles & Permissions' section of the CAFM Way web application. The 'Role Matrix' tab is selected, showing a table of permissions for various roles across different document types. The 'DocType' is set to 'Report'. The table includes columns for Role, Source, Level, Owner, and a series of checkboxes for permissions: Select, Read, Write, Create, Delete, Print, Email, Report, Import, Export, Share, and Set Perms. The roles listed are Report Viewer, Auditor, Finance Officer, FM Administrator, Procurement Officer, HSE Officer, FM Manager, Asset Manager, Helpdesk Agent, and Supervisor. The user 'Omar Al-Mansouri' is logged in as 'FM Admin'.

Role	Source	Level	Owner	Select	Read	Write	Create	Delete	Print	Email	Report	Import	Export	Share	Set Perms
Report Viewer	Standard	0	No	☒	☒	☐	☐	☐	☒	☐	☒	☐	☒	☐	☐
Auditor	Standard	0	No	☒	☒	☐	☐	☐	☒	☐	☒	☐	☒	☐	☐
Finance Officer	Standard	0	No	☒	☒	☐	☐	☐	☒	☐	☒	☐	☒	☐	☐
FM Administrator	Standard	0	No	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐
Procurement Officer	Standard	0	No	☒	☒	☐	☐	☐	☒	☐	☒	☐	☒	☐	☐
HSE Officer	Standard	0	No	☒	☒	☐	☐	☐	☒	☐	☒	☐	☒	☐	☐
FM Manager	Standard	0	No	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐
Asset Manager	Standard	0	No	☒	☒	☐	☐	☐	☒	☐	☒	☐	☒	☐	☐
Helpdesk Agent	Standard	0	No	☒	☒	☐	☐	☐	☐	☐	☒	☐	☐	☐	☐
Supervisor	Standard	0	No	☒	☒	☐	☐	☐	☒	☐	☒	☐	☒	☐	☐

Figure 21 Role matrix: permissions per role for a document type

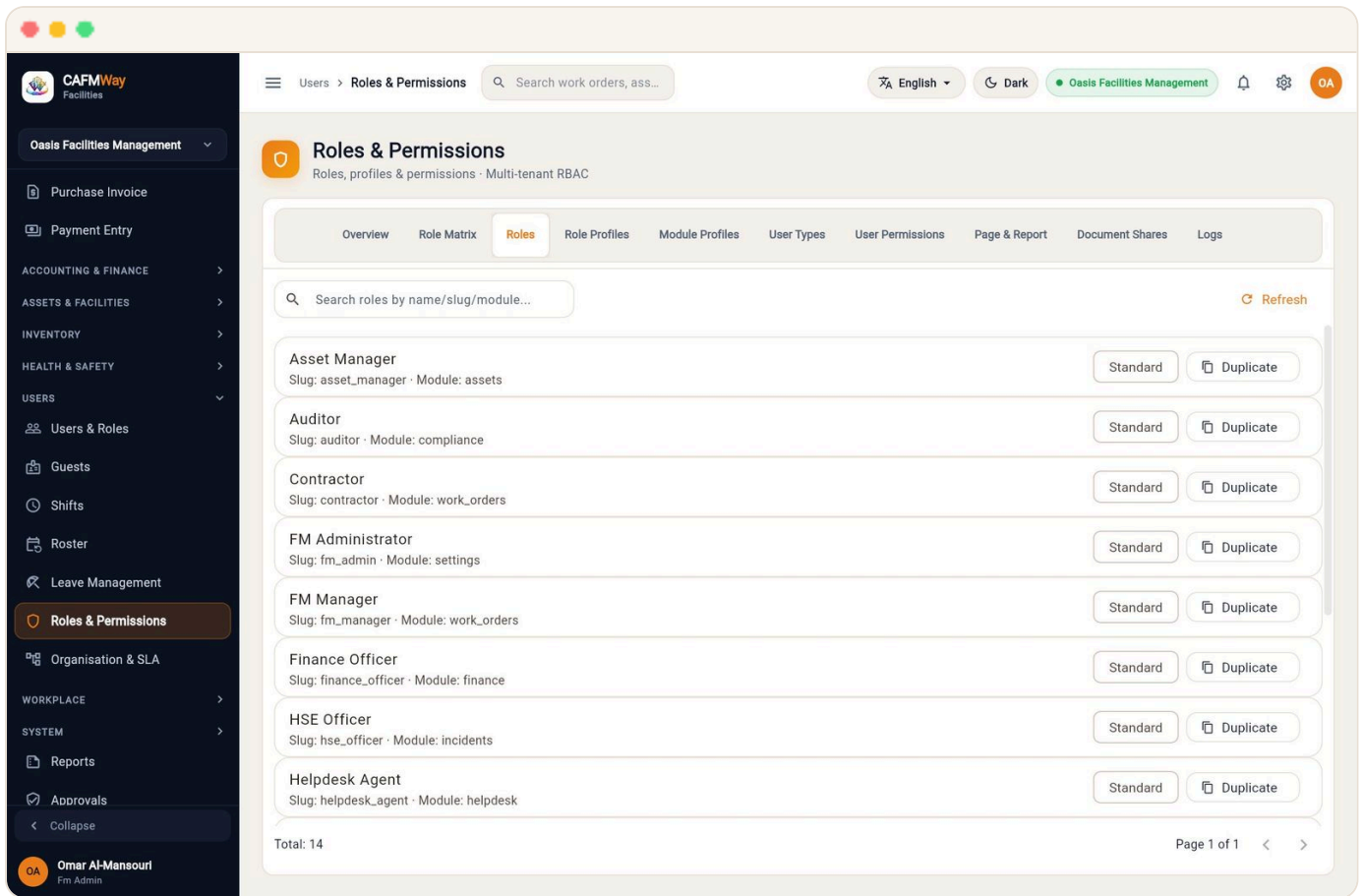


Figure 22 The standard roles

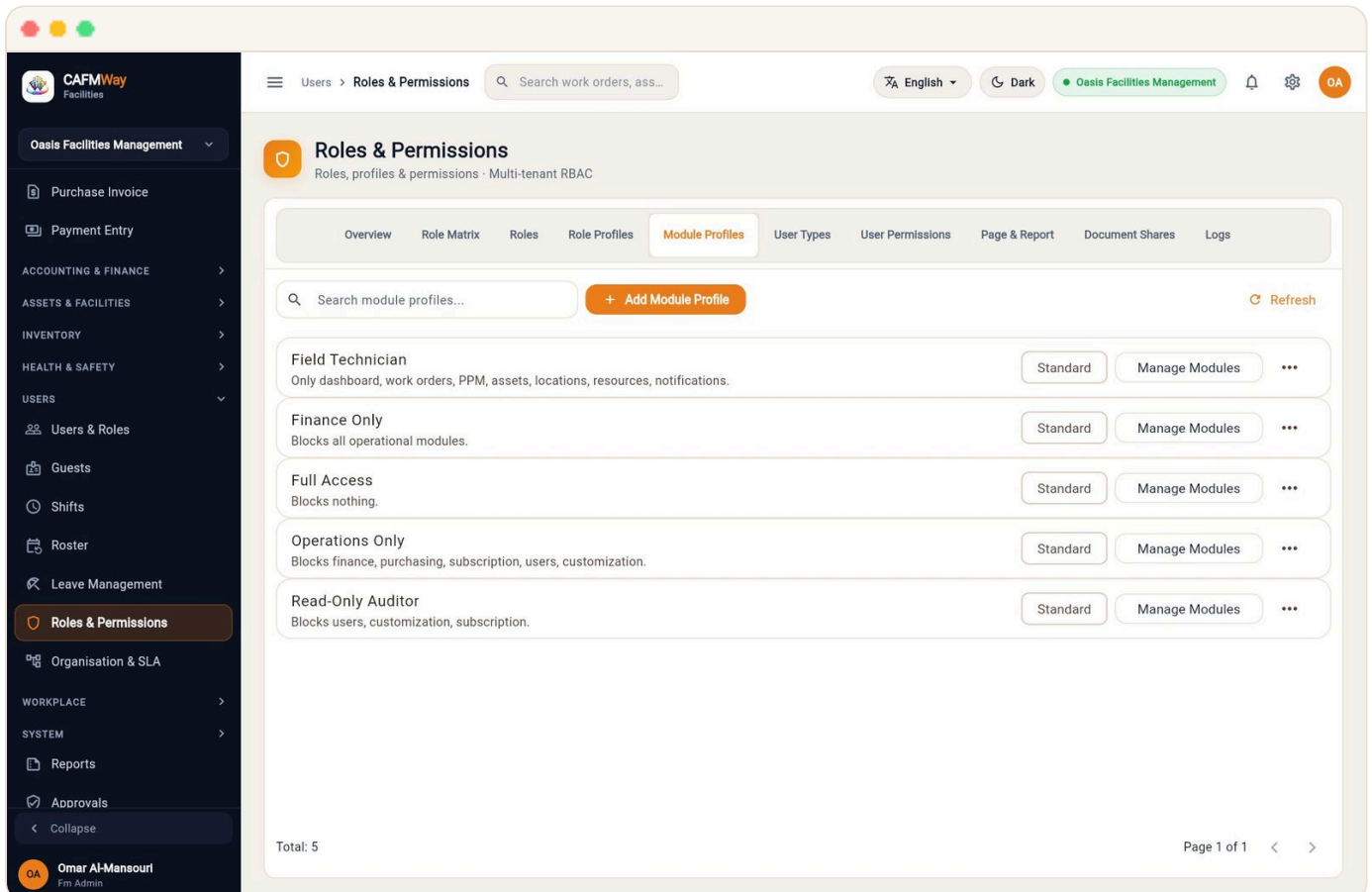


Figure 23 Module profiles

TIP

Change the standard roles as little as possible. When you need a variation, **Duplicate** a role and adjust the copy, so updates to the standard roles still reach you.

Locations and assets

Everything in CAFM Way happens *somewhere* and often *to something*. Locations and assets give each request and work order that context, and every one of them has a QR code that people can scan.

The location hierarchy

Who: FM administrators and managers
Where: ASSETS & FACILITIES → **Locations & Spaces**

Locations form a coded tree: **project > area > building > floor > room**, with open **spaces** (car parks, gardens) under an area. Every level gets a **coded ID** built from its parents. For example `OB-5140-AR1-B1-F1-R1` is the Reception room: project OB-5140, area 1, building 1, floor 1, room 1.

The chips above the tree compare what you use with what your subscription allows: areas, buildings, spaces and assets.

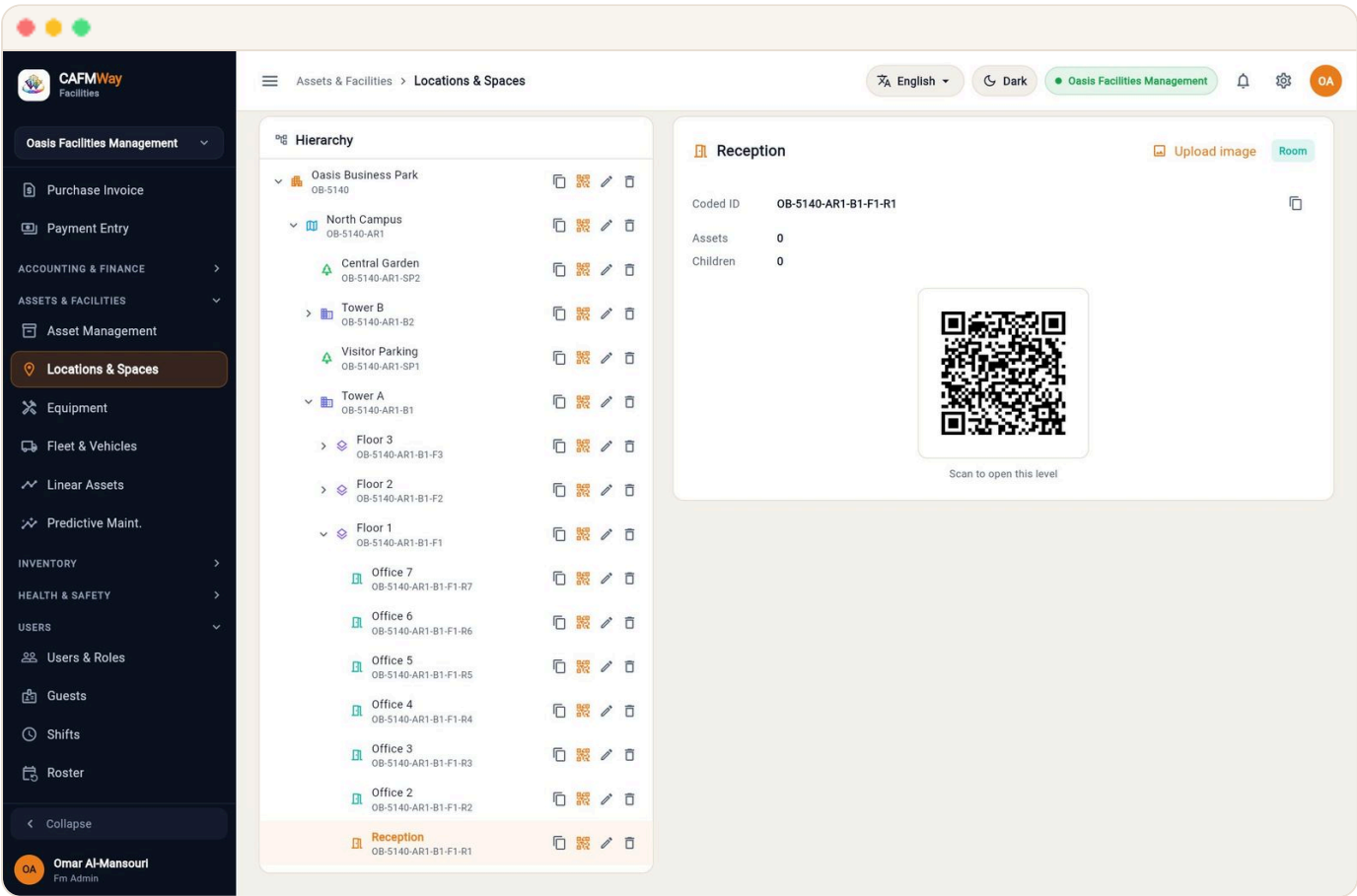


Figure 24 The tree and the selected room's coded ID and QR code

- Click the arrow on a level to open it. Click a level's name to see its coded ID, asset count, children and QR code on the right.
- The icons on each row: **Copy coded ID**, **View QR**, **Rename** and **Delete location**.
- **Upload image** attaches a photo or floor plan to the selected level.

NOTE

The structure a company entered when it registered is already here on day one. For Oasis that was Oasis Business Park › North Campus › Tower A and Tower B (three floors each), Visitor Parking and Central Garden.

Add a level

- 1 Click **Add Level**.
- 2 Choose the level type: **Area**, **Building**, **Floor**, **Room** or **Space**.
- 3 Choose where it sits, for example *Tower A > Floor 1*. The list only offers valid parents for the type you chose.
- 4 Enter the name and, optionally, a short code.
- 5 Optionally click **Upload image**, then click **Create**.

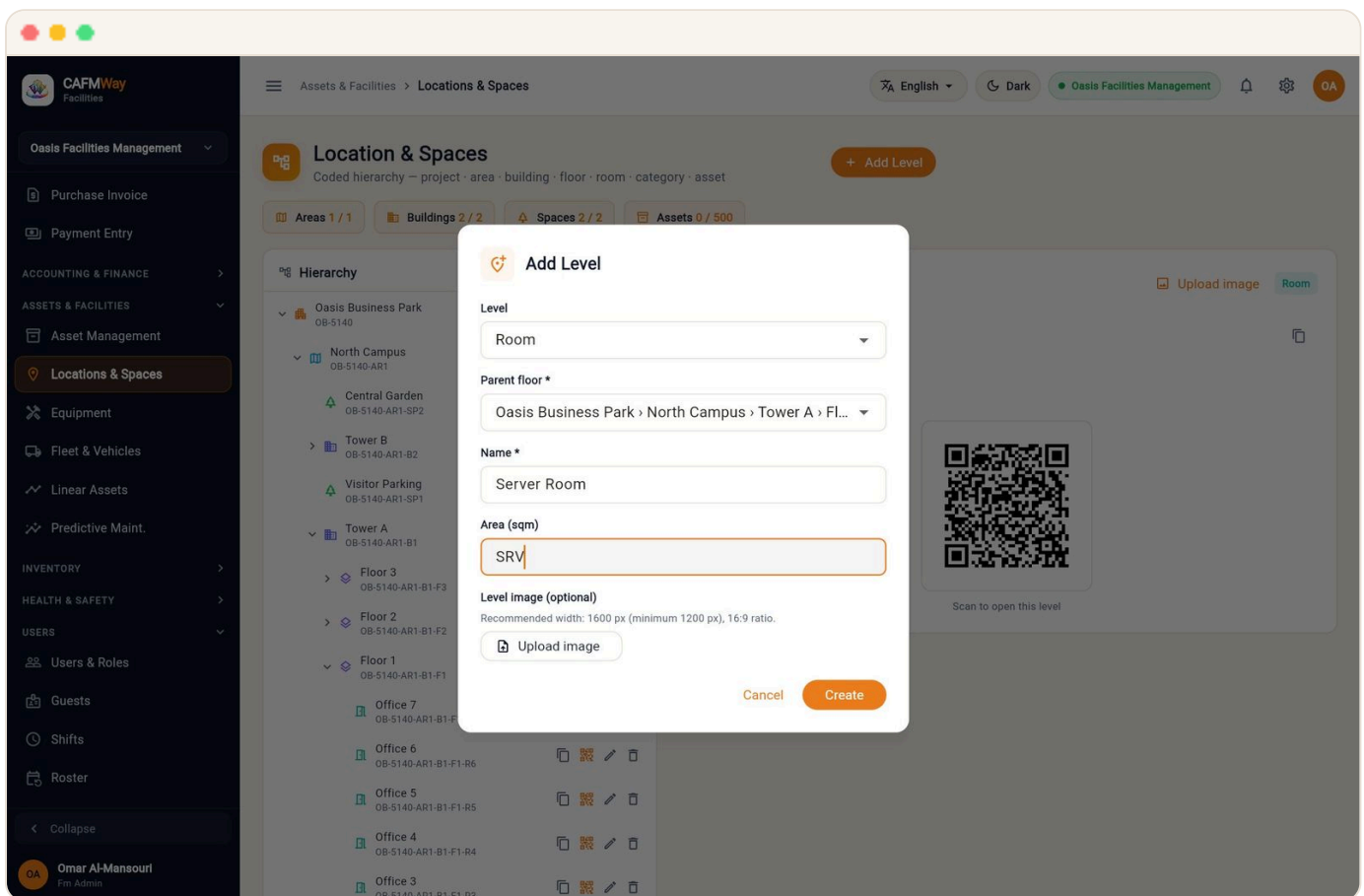


Figure 25 Adding a server room to Tower A, floor 1

The new level gets the next coded ID (the server room became `OB-5140-AR1-B1-F1-R8`).

When you go beyond your subscription

Rooms and floors are unlimited. Areas, buildings and open spaces are counted against your subscription. If you add one beyond the limit, it is saved but marked **Not submitted**, and a banner explains:

Created, but not usable yet. This facility is beyond your current plan, so nothing else in CAFM can see it until CAFM confirms payment. Send it for pricing under Subscription → Requests.

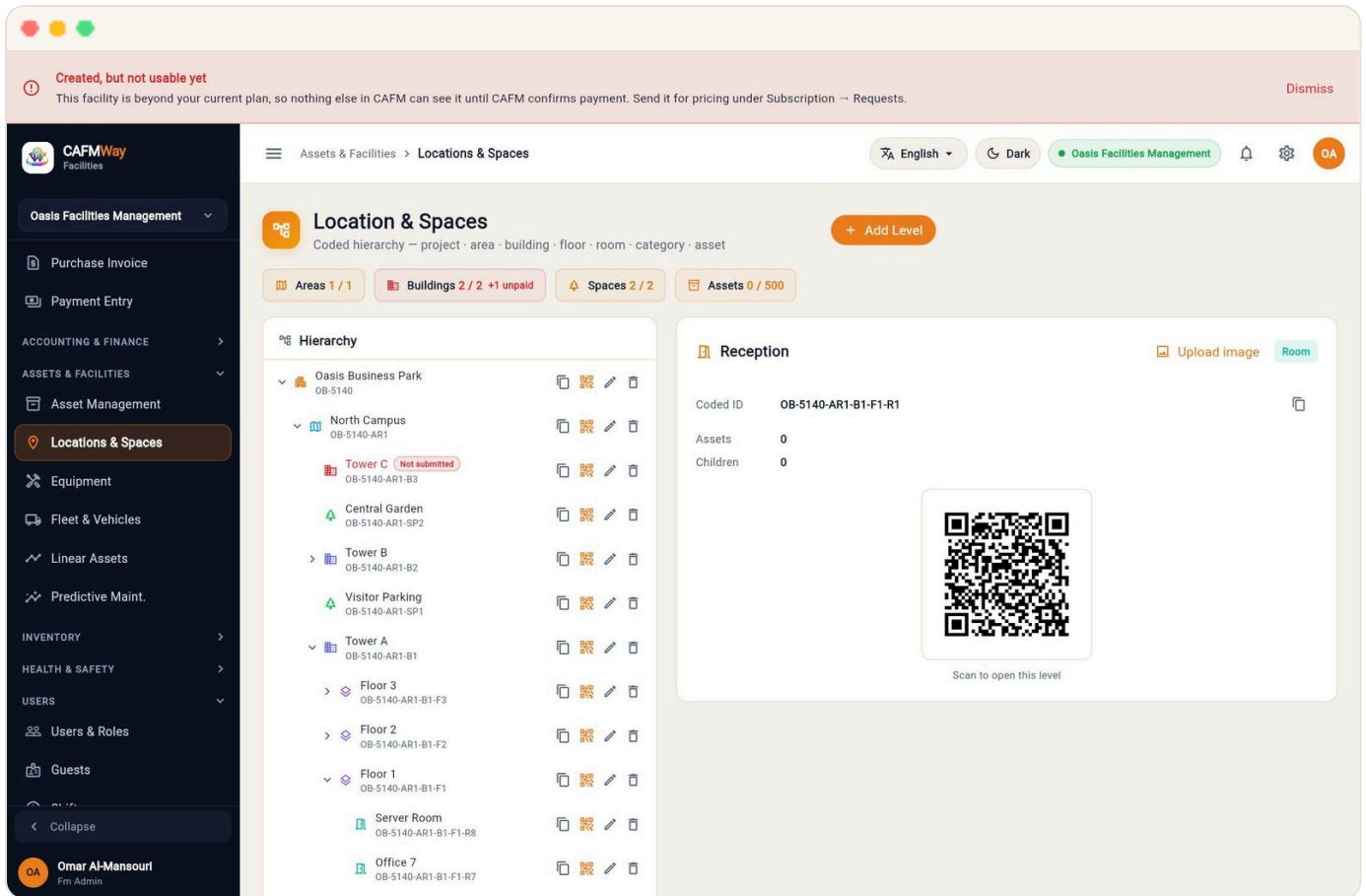


Figure 26 Tower C added beyond the limit: "Not submitted", and the building chip shows +1 unpaid

Send it to CAFM from **Subscription → Requests** (see Request more facilities). Once CAFM activates the request, the building becomes usable everywhere.

QR codes

Every location and every asset has a QR code. Scanning it with the Requestor app opens a request form that already knows where the problem is. In the Technician app, scanning shows the jobs for that place or asset.

- 1 Select a level and click the **View QR** icon to show its code, or select an asset to see its code on the **Overview** tab.
- 2 To print labels for many locations or assets at once, use the QR label report in the **Reports** centre.

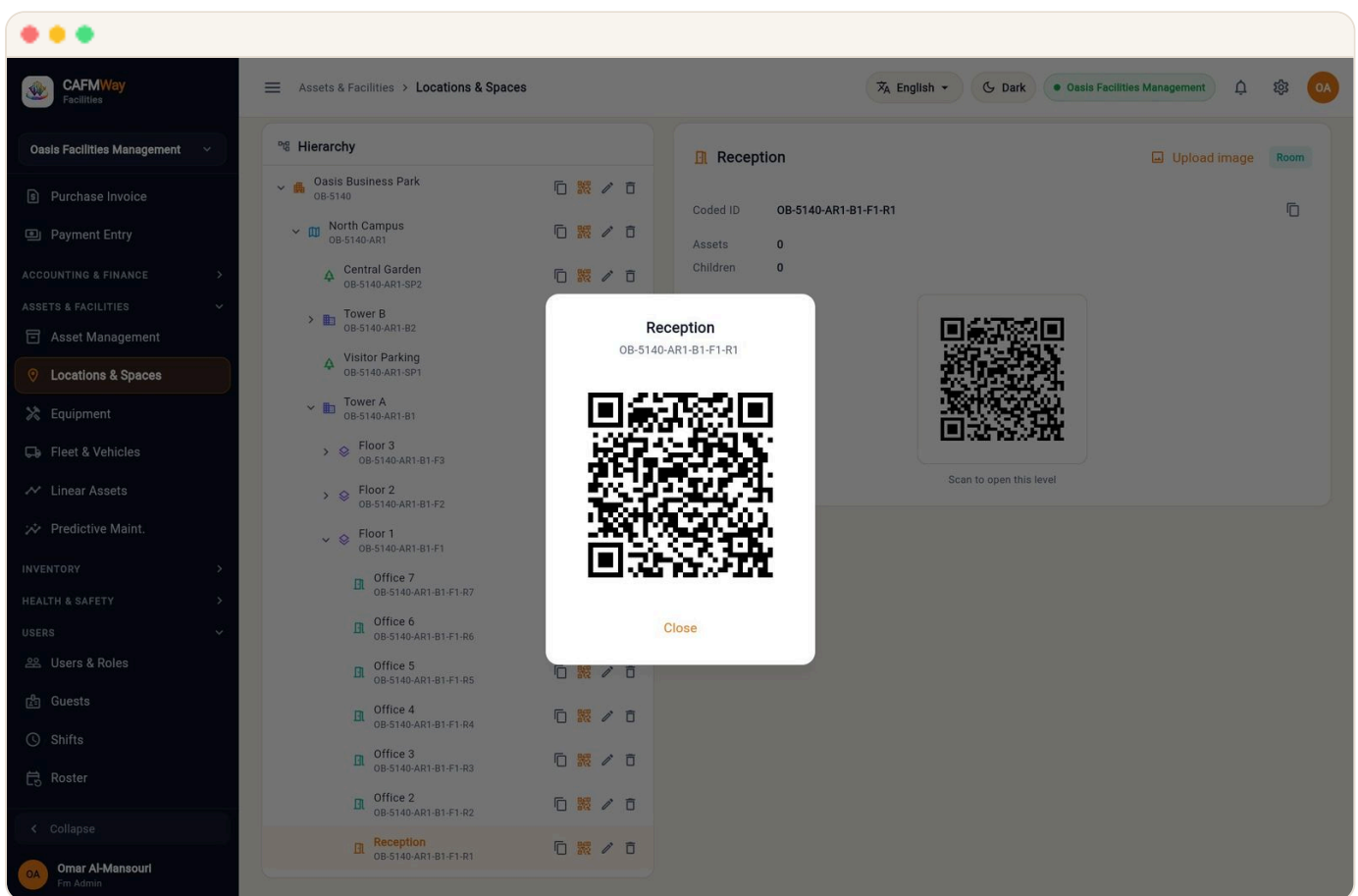


Figure 27 The QR code of a room, ready to print

TIP

Stick room QR labels by the door and asset labels on the equipment itself. Requests raised from a scan need no typing of locations.

Register an asset

Who: FM administrators, asset managers

Where: ASSETS & FACILITIES → **Asset Management**

1 Click **Add Asset**. The form has four steps.

2 **Basic information:**

- Choose the **location** (any level of the tree) and enter the asset name.
- Choose the **category** and **type**, for example *HVAC > Chiller*.
- Set the **criticality**, **status**, **condition** and **ownership**, and add notes.

The screenshot shows the 'Register New Asset' form in the CAFM Way web app. The form is titled 'Register New Asset' and includes a progress bar with four steps. The first step, 'Asset Identity, Category & Location', is active. The form fields include: Location (Oasis Business Park > North Campus > Tower A), Location Code (OB-5140-AR1-B1), Asset Name (optional) (Chiller CH-01 - Tower A Roof), Category (HVAC), Sub-category (Chiller), Criticality (Critical), Current Status (Operational), Condition (Good), and Ownership (Owned). A text area for Notes/Description contains the text 'Primary chiller serving Tower A. 400 TR, R-134a'. A 'Continue' button is at the bottom right.

Figure 28 Step 1: location, category, type and criticality

3 **Technical details:** manufacturer, model, serial number, installation and warranty dates, capacity, power supply, refrigerant, maintenance frequency, and the last and next service dates. Attach manuals, drawings or photos.

CAFM Way Facilities

Oasis Facilities Management

SLA Escalation

Snagging

Incidents

PURCHASES

Suppliers

Contractors

Request for Quotation

Supplier Quotation

Purchase Order

Goods Receipt

Purchase Invoice

Payment Entry

ACCOUNTING & FINANCE

ASSETS & FACILITIES

Asset Management

Locations & Spaces

Equipment

Collapse

Omar Al-Mansouri
Fm Admin

Assets & Facilities > Asset Management

English Dark Oasis Facilities Management

CAFM > Assets > New Asset

Register New Asset

Complete all sections to add this asset to the CAFM register

1 2 3 4

Technical Specifications

Manufacturer: Carrier

Model Number: 30XA-402

Serial Number: SN2024-7731-CH1

Purchase Date: DD/MM/YYYY

Installation Date: DD/MM/YYYY

Capacity / Rating: 400 TR

Power Consumption: 400V / 3-phase / 50Hz

Refrigerant Type: R-134a

Service Interval: Every 3 months

Last Service Date: DD/MM/YYYY

Next Service Due: DD/MM/YYYY

Attachments (Manuals, Drawings, Photos)

Upload manuals, drawings, or photos

Previous Continue

Figure 29 Step 2: technical details

4

Financial and lifecycle:

- purchase cost, salvage value, useful life and depreciation method, and the asset account
- the supplier, purchase order, installation date and installer
- the warranty provider, contract number and support contact

Assets & Facilities > Asset Management

English Dark Oasis Facilities Management

CAFWay Facilities

Oasis Facilities Management

SLA Escalation Snagging Incidents

PURCHASES

Suppliers Contractors Request for Quotation Supplier Quotation Purchase Order Goods Receipt Purchase Invoice Payment Entry

ACCOUNTING & FINANCE

ASSETS & FACILITIES

Asset Management

Locations & Spaces Equipment

Omar Al-Mansouri Fm Admin

CAFWay > Assets > New Asset

Register New Asset

Complete all sections to add this asset to the CAFM register

1 2 3 4

Financial Information

Purchase Cost (QAR) * 950000 Salvage Value (QAR) 95000 Useful Life (years) 20

Depreciation Method Straight-Line Ownership Owned

Cost Center None GL Account 1500 - Fixed Assets

Purchase & Installation

Supplier Carrier Gulf Trading PO Number PO-2024-0031 Delivery Date DD/MM/YYYY

Installed By Gulf Climate Control

Warranty Information

Warranty Status Warranty Expiry Date Warranty Provider

Figure 30 Step 3: cost, depreciation, purchase and warranty

5 Review, then click **Register Asset**.

Assets & Facilities > Asset Management

English Dark Oasis Facilities Management

CAFWay Facilities

Oasis Facilities Management

SLA Escalation Snagging Incidents

PURCHASES

Suppliers Contractors Request for Quotation Supplier Quotation Purchase Order Goods Receipt Purchase Invoice Payment Entry

ACCOUNTING & FINANCE

ASSETS & FACILITIES

Asset Management

Locations & Spaces Equipment

Omar Al-Mansouri Fm Admin

CAFWay > Assets > New Asset

Register New Asset

Complete all sections to add this asset to the CAFM register

1 2 3 4

Review Asset Information

IDENTITY

Asset Name Chiller CH-01 - Tower A Roof

Category HVAC

Sub-category Chiller

Status Operational

Criticality Critical

Ownership Owned

LOCATION

Location Oasis Business Park > North Campus > Tower A

Location Code OB-5140-AR1-B1

SPECIFICATIONS

Manufacturer Carrier

Model 30XA-402

Serial Number SN2024-7731-CH1

Purchase Date -

FINANCIAL

Purchase Cost QAR 950000

Depreciation Straight-Line

Useful Life 20 years

Figure 31 Step 4: review before registering

The asset gets a coded ID that extends its location's code with the category and type, for example **OB-5140-AR1-B1-HVC-CHL001**, and a QR label is ready to print. **Register Another** starts a new form, and

View Assets returns to the register.

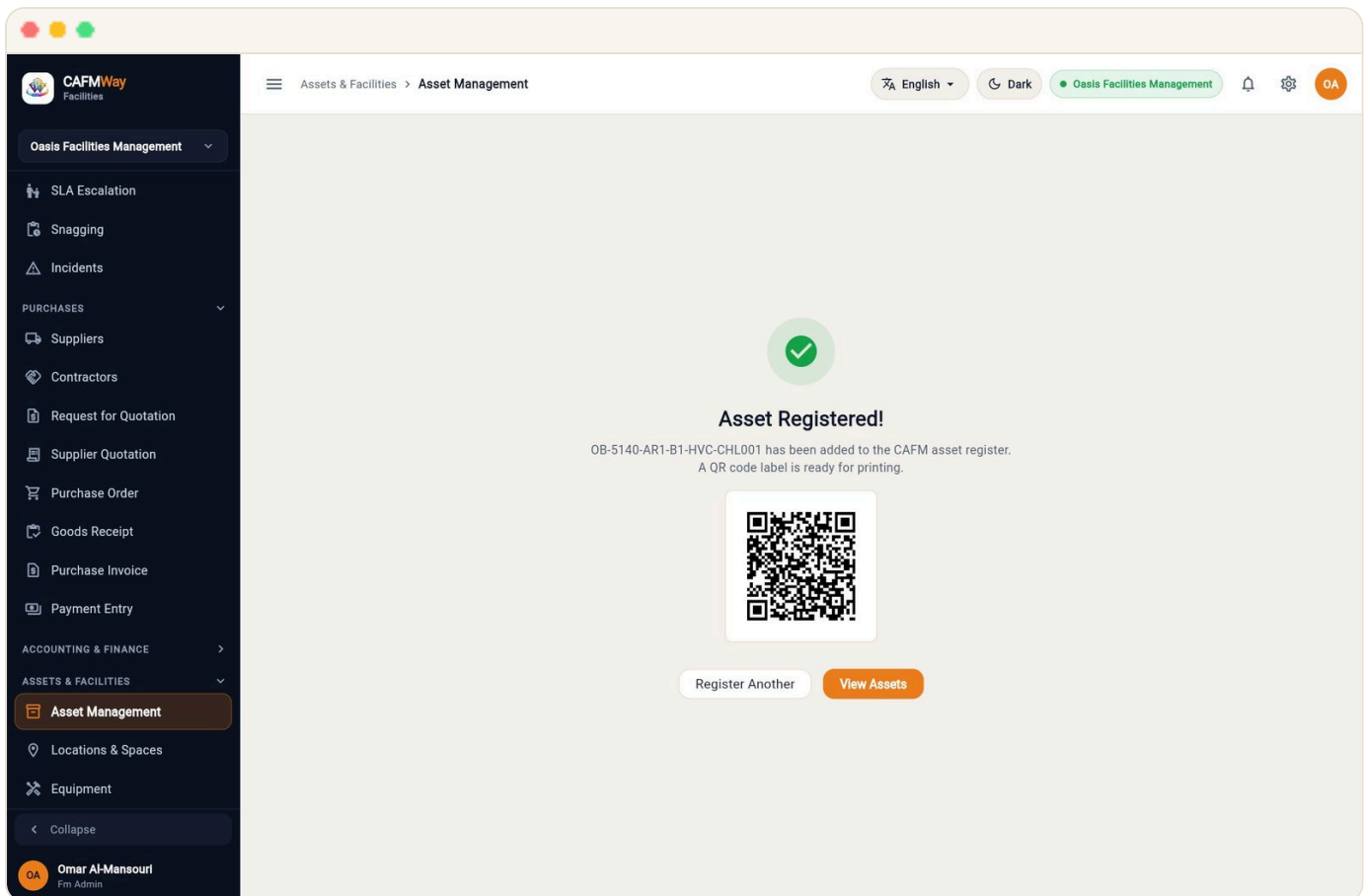


Figure 32 The asset is registered, with its QR label

TIP

For many assets at once, use **Bulk Add** or **Import Excel**. **Scan QR** finds an asset from its label.

The asset register

The register shows totals (all, operational, under maintenance, critical or down) and every asset as a card or a list. Filter by category, location or status, or search by name or code. **Export** downloads the list.

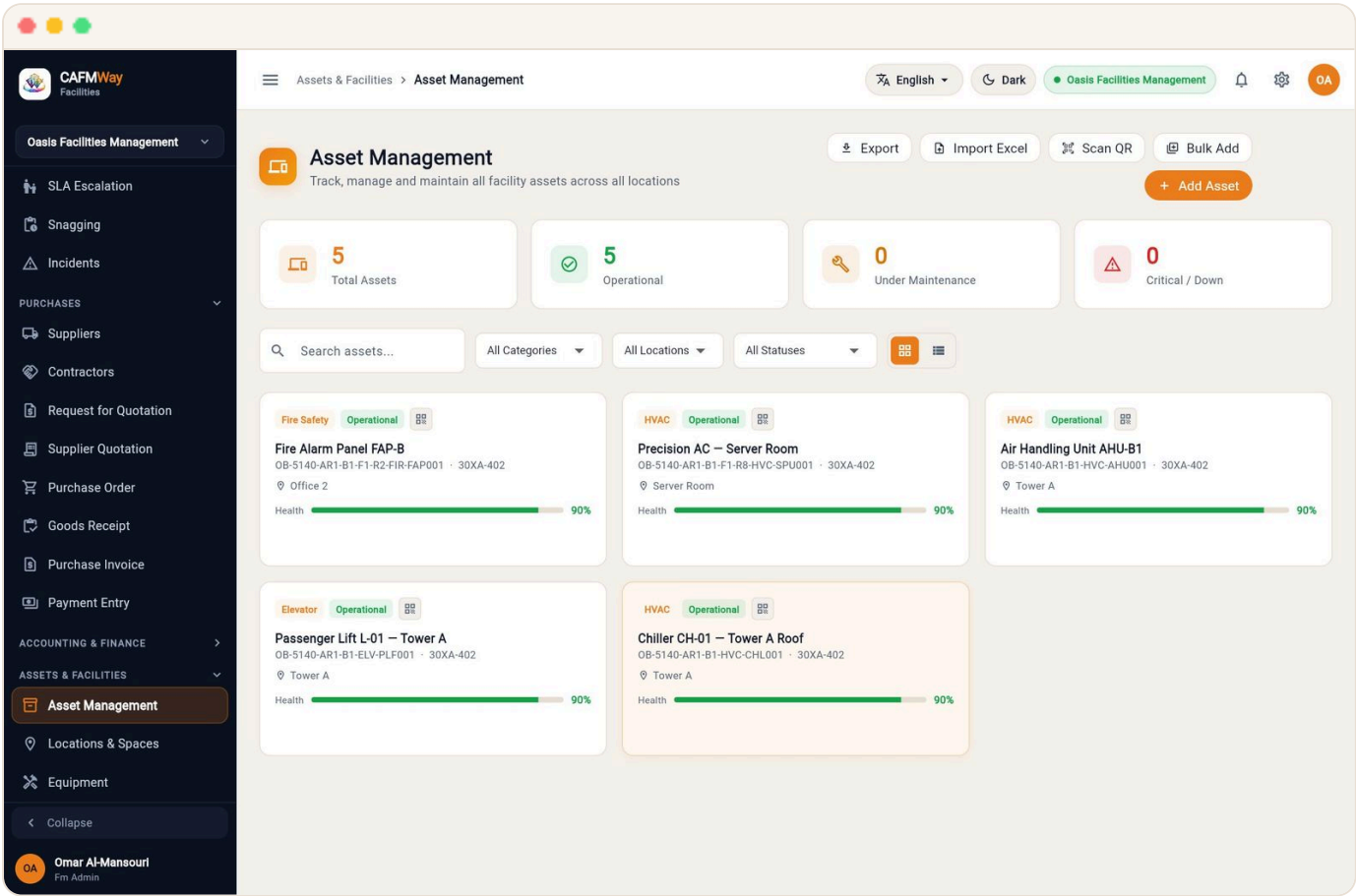


Figure 33 Asset cards

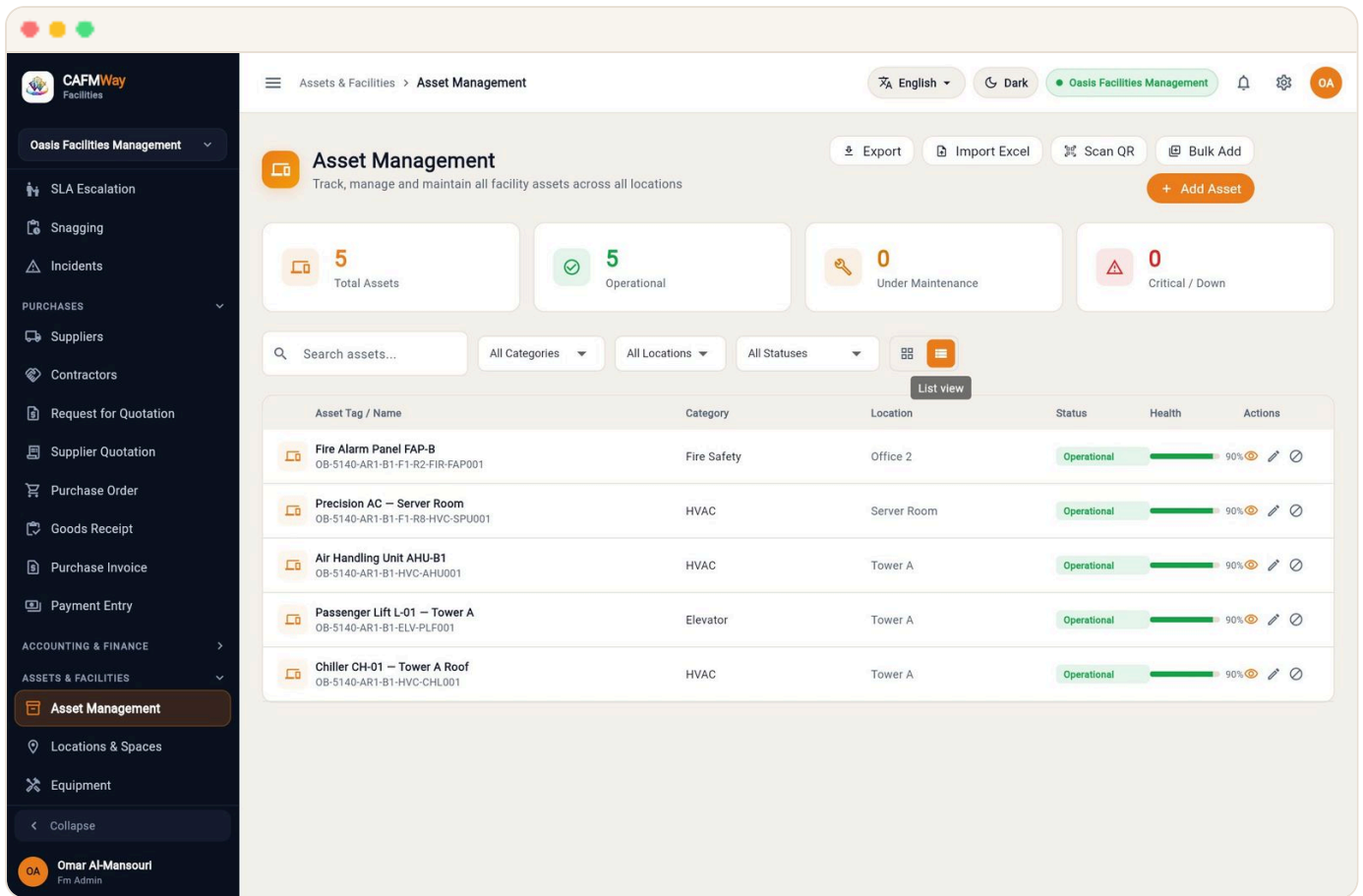


Figure 34 The same register as a list

Click an asset to open it. The header shows its ID, location, last maintenance, next PPM, open work orders and status. The buttons are **Export**, **Link WO** (link a work order), **Share** and **Edit Asset**. The tabs are:

- **Overview:** technical specifications and the QR code
- **Details**
- **Lifecycle:** cost, depreciation and warranty over time
- **Work Types:** which categories of work apply
- **Monitored Values:** meter or sensor readings
- **Documents**
- **Events:** the asset's history
- **Schedules:** its PPM plans

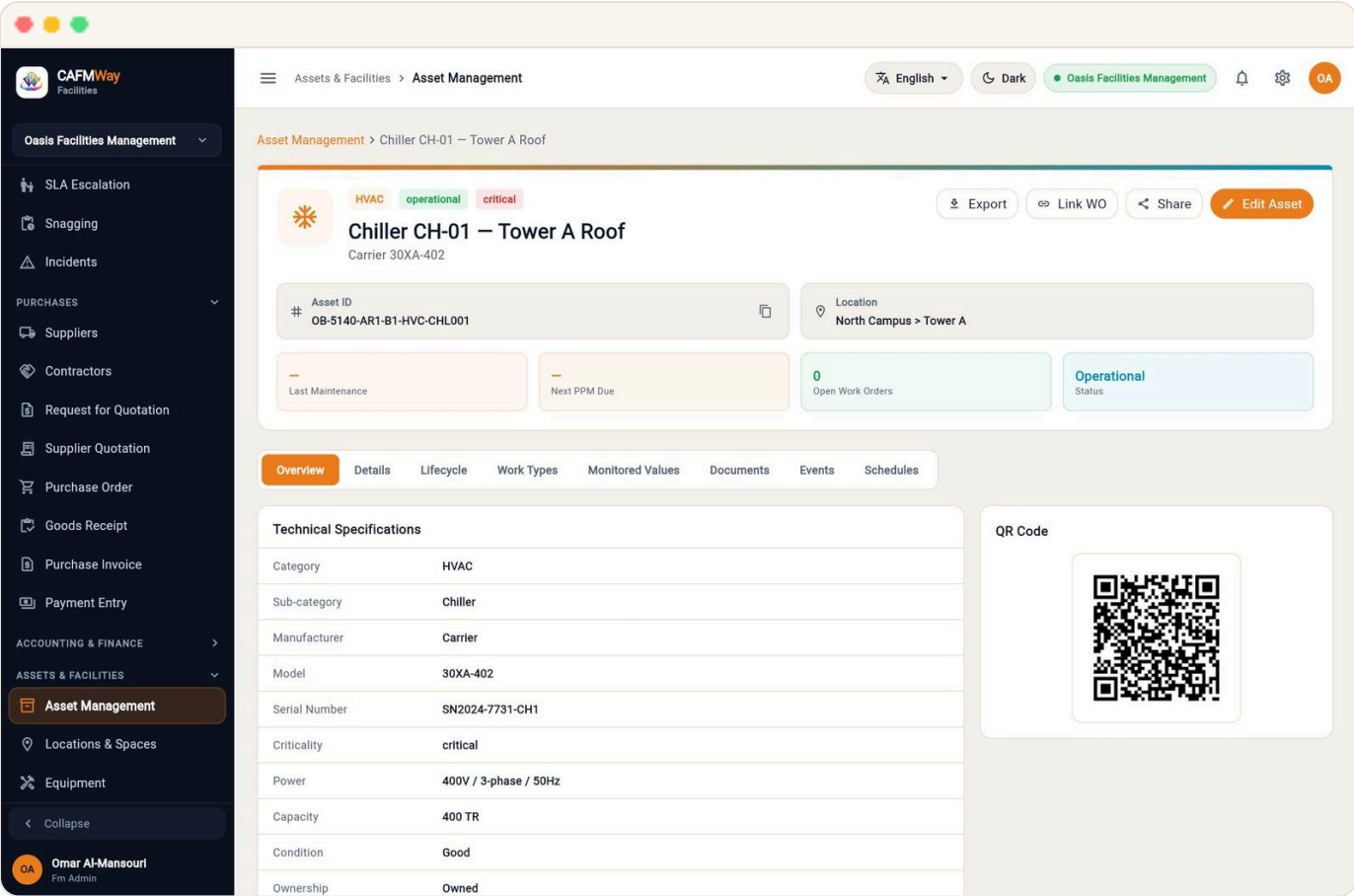


Figure 35 Asset overview

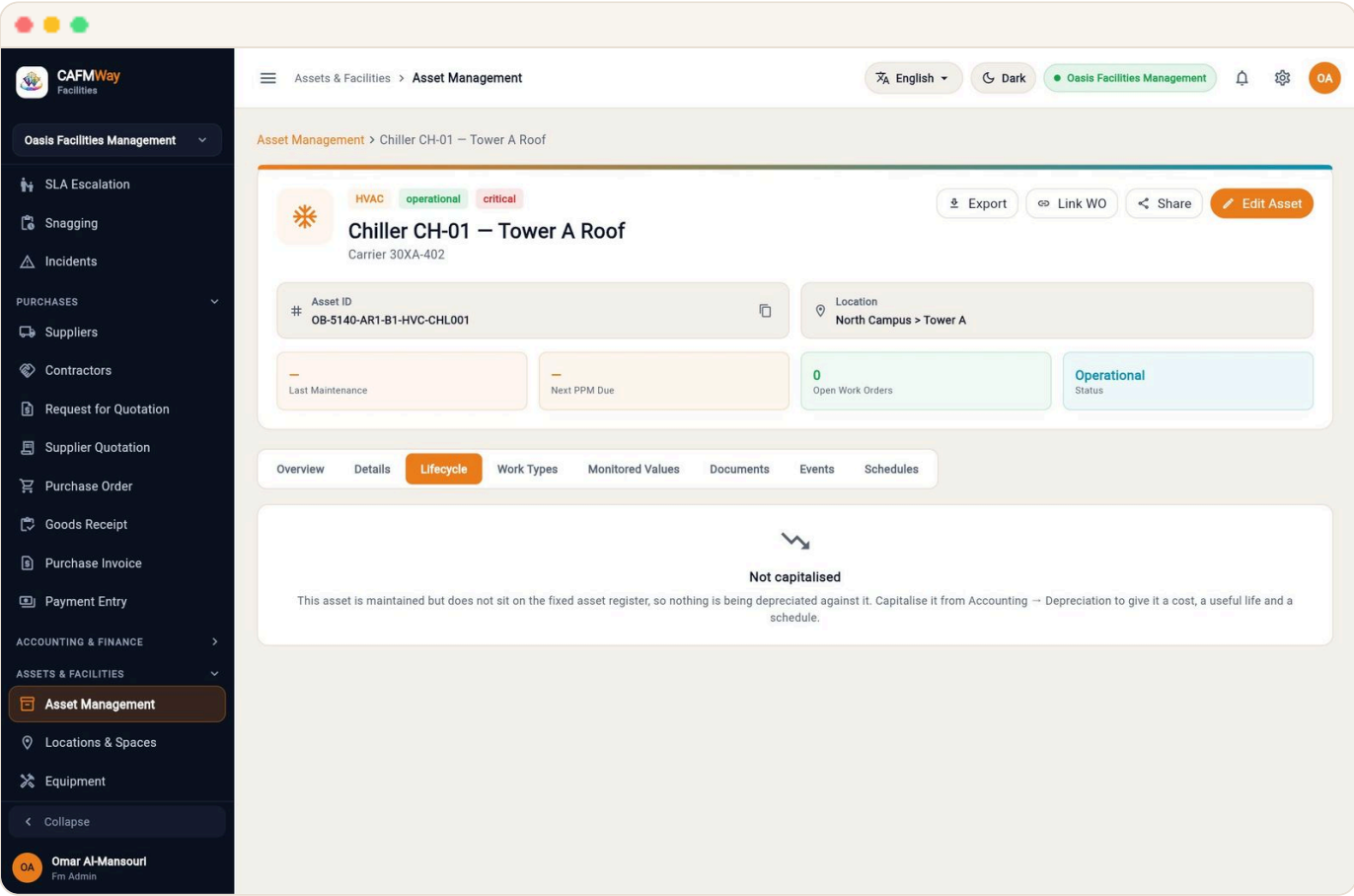


Figure 36 Lifecycle

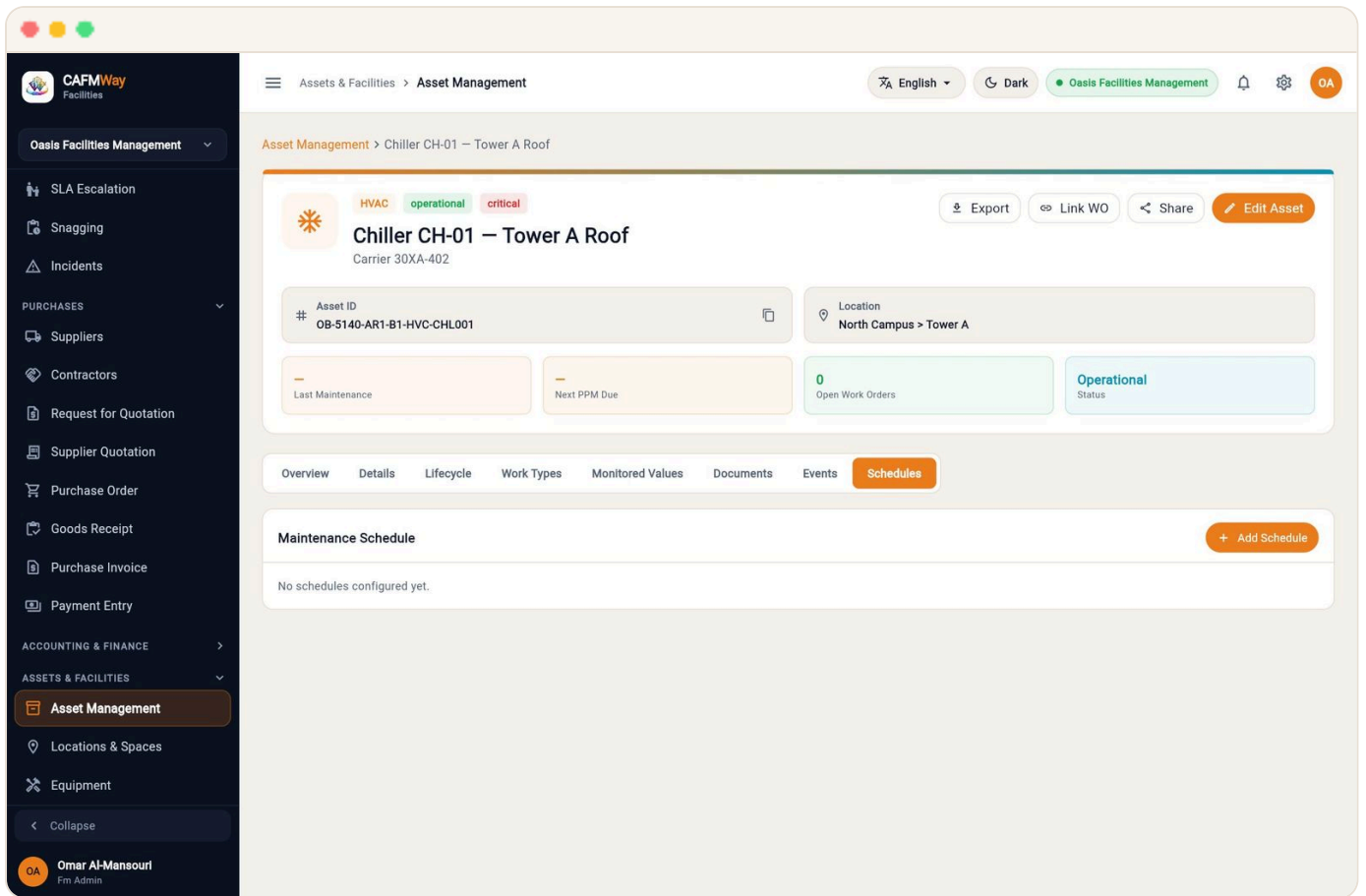
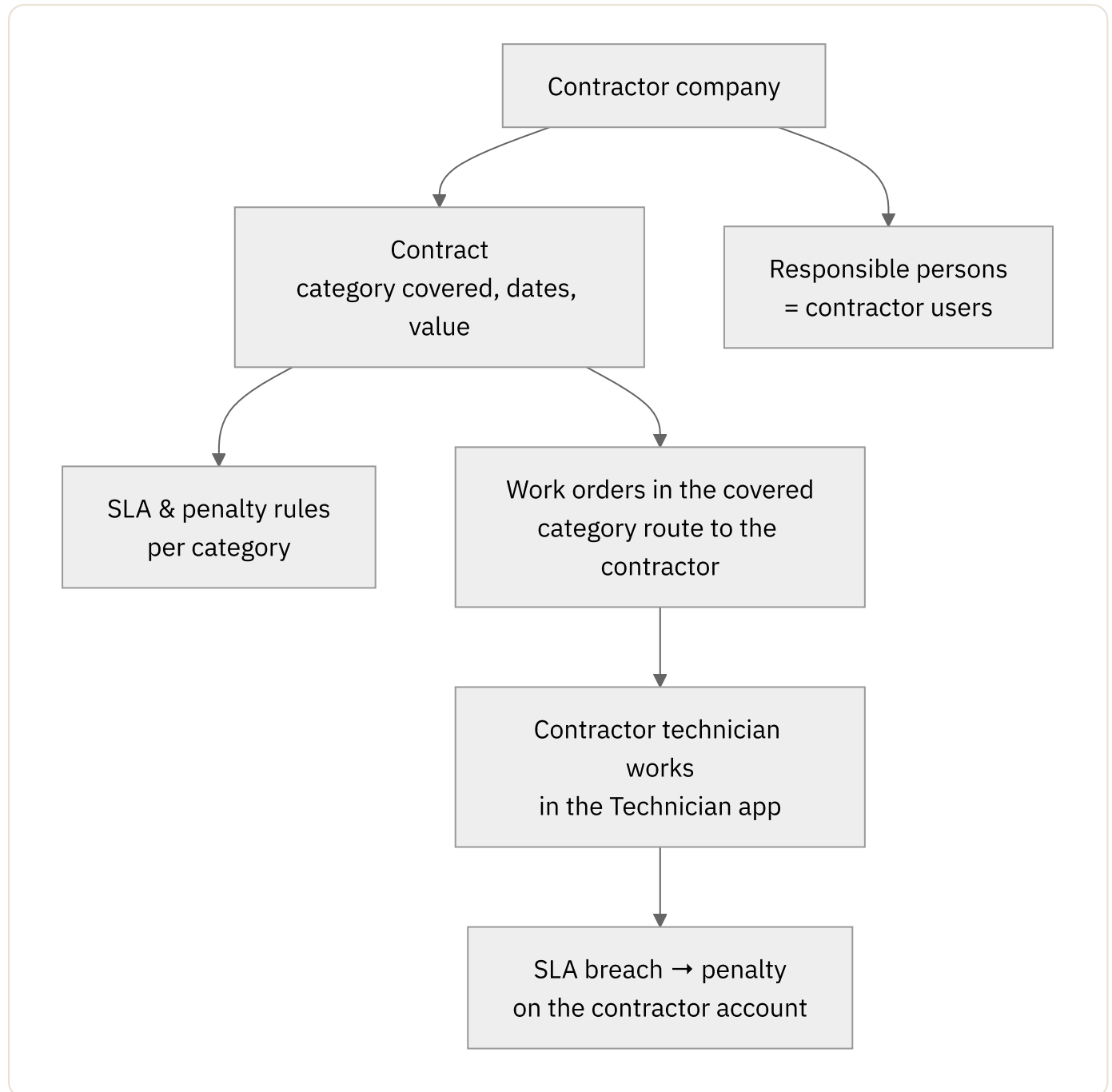


Figure 37 PPM schedules of the asset

Contractors

Contractors are outside companies that carry out part of your work: lift maintenance, fire systems, specialist HVAC. In CAFM Way a contractor is a company record with contracts, SLA and penalty rules, and its own users, who work in the Technician app like your own staff.



The contractors list

Who: FM administrators, managers, procurement

Where: PURCHASES → **Contractors**

Each card shows the company, its commercial registration number, status (**Active**, **Paused**, **Expired**, **Terminated**), trades, number of contracts, responsible persons and contract value. Search by name, or filter by trade and status.

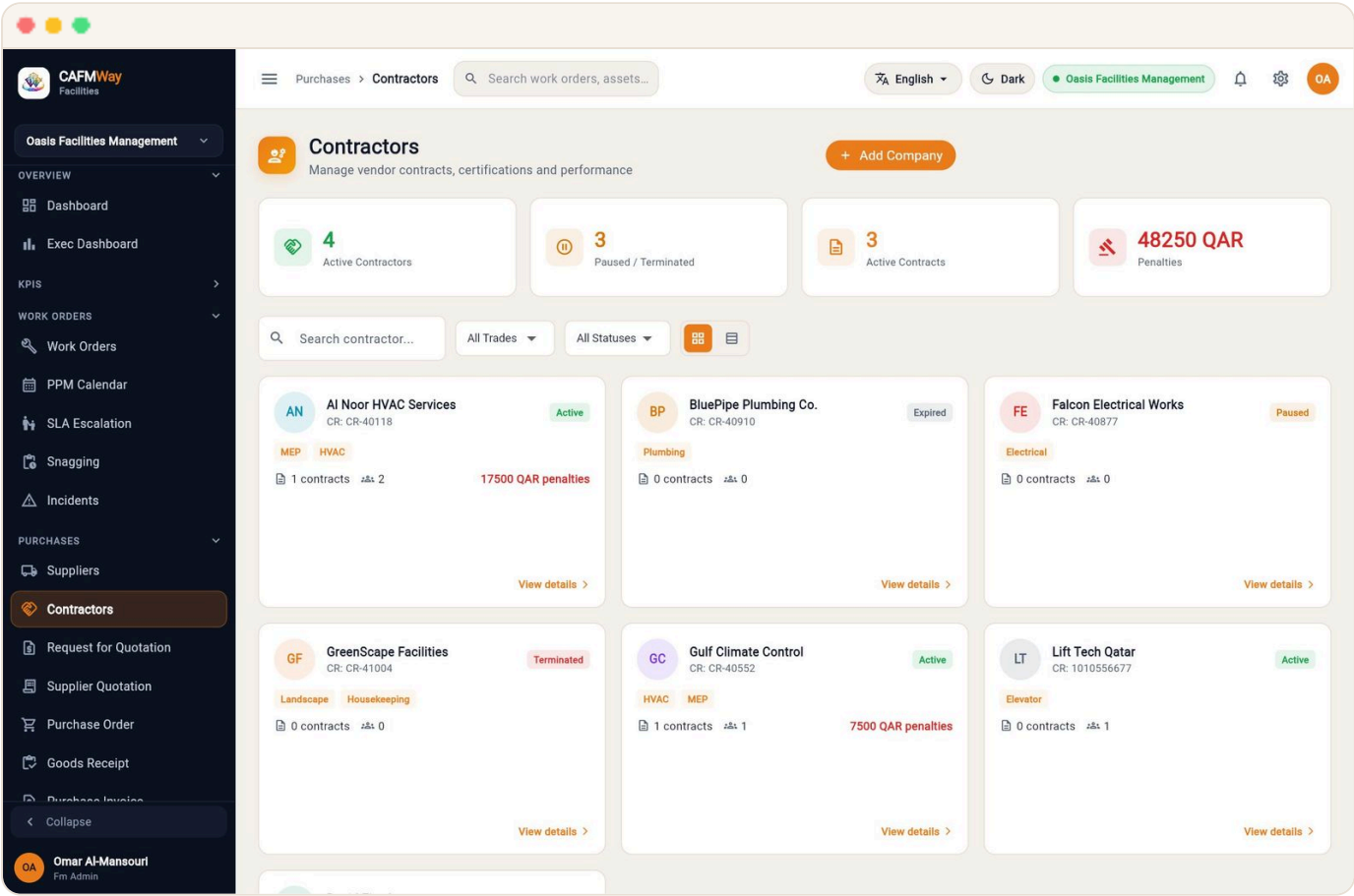


Figure 38 Contractor companies

Add a contractor company and its first contract

Adding a contractor is one guided form in four steps.

Step 1: Company and responsible persons

- 1 Click **Add Company**.
- 2 Enter the company name, CR number, account manager, phone, email, website and address.

The screenshot shows the CAFMWay web application interface. The left sidebar contains navigation menus for Overview, KPIs, Work Orders, and Purchases. The main content area is titled 'Add Company & First Contract' and includes a progress bar with four steps. The first step is active, showing the 'Company Basic Information' section with fields for Company Name, CR Number, Account Manager, Company Phone, Company Email, Website, and Company Address. The second section, 'Responsibles', includes a table for adding responsible persons with fields for Full Name, Username, and Email. A '+ Add Responsible' button is visible in the top right of the Responsibles section.

Figure 39 Company details

- 3 Under **Responsibles**, enter the first person. Each responsible person is a user who signs in to the Technician app:
 - the full name, **Username** and **Email**
 - a password, entered twice, and the phone number
 - the **Role**, as in the table below
- 4 Tick **Will receive service request** for the people who should be notified of new requests and work orders for this contractor.
- 5 Click **Add Responsible** to add more people now, or add them later from the company page. Then click **Continue**.

Figure 40 The first responsible person, who will sign in to the Technician app

Contractor role	Sees in the app
Technician	Their own assigned jobs
Supervisor	The team's jobs
Account Manager	The whole company: contracts, people, penalties and financials
Coordinator	Scheduling and dispatch for the company
Engineer	Technical review of the company's jobs

Step 2: Contract

- 1 Enter the **contract number**, a **title**, and the **start** and **end** dates. The date field has a keyboard icon to type the date instead of picking it.
- 2 Choose the **category** and **sub-category** the contract covers.
- 3 Attach the signed contract (PDF or image). Afterwards, check on the **Contracts** tab that the file is there. If it isn't, add it with **Attach file** on the contract card.
- 4 Enter the **contract value** and, optionally, a **ceiling on all penalties**.
- 5 Write the **penalty clause** (quoted on every penalty raised under this contract) and the **scope**: terms, inclusions and exclusions.

The screenshot displays the CAFMWay web application interface. On the left is a dark sidebar with navigation options: Overview (Dashboard, Exec Dashboard), KPIS, Work Orders (Work Orders, PPM Calendar, SLA Escalation, Snagging, Incidents), Purchases (Suppliers, **Contractors**, Request for Quotation, Supplier Quotation, Purchase Order, Goods Receipt, Purchase Invoice), and a user profile for Omar Al-Mansouri. The main content area is titled 'Purchases > Contractors' and features a search bar and a progress indicator with four steps. Step 2, 'First Contract Details', is active. The form contains the following fields:

- Contract Number ***: C-2026-014
- Contract Title ***: Annual Lift Maintenance – Oasis Business Park
- Start Date ***: 2026-10-01
- End Date ***: 2027-09-30
- Category ***: Elevator
- Sub Category ***: All
- Contract Attachment ***: Tap to select a file
- Total Value**: 180000
- Total Penalty Cap**: 18000
- Penalty Clause**: A penalty of QAR 500 applies for each hour an entrapment response exceeds 1 hour.
- Contract Details**: Preventive maintenance of 4 passenger lifts (monthly), 24/7 breakdown and entrapment response, spare parts under QAR 2,000 included.

At the bottom, there are 'Previous' and 'Continue' buttons.

Figure 41 Contract C-2026-014: annual lift maintenance, category Elevator

Step 3: SLA & penalties per category. For each category the contract covers, click **Add SLA Rule** (or edit the proposed rule):

- **SLA Time (hours):** the fix time
- **Response Time (hours)**
- **Penalty Basis:** for example a fixed amount per breach
- **Amount and Max per breach**
- the **penalty clause**

The screenshot shows the CAFMWay web application interface. On the left is a dark sidebar with navigation menus for Overview, Work Orders, and Purchases. The main content area is titled 'Add Company & First Contract'. A modal window titled 'Edit SLA Rule' is open in the center, displaying the following configuration:

- Category:** Elevator
- Sub Category:** All
- SLA Time (hours):** 4
- Response Time (hours):** 1
- Penalty Basis:** Fixed amount per breach
- Amount:** 500
- Max per breach:** 5000
- Penalty Clause:** QAR 500 for each breach of the 4-hour fix time on lift breakdowns.

At the bottom of the modal are 'Cancel' and 'Save' buttons. The background page shows a progress bar and a 'Continue' button.

Figure 42 4-hour fix time, 1-hour response, QAR 500 per breach

Step 4: Review. Check everything, then click **Save Company**.

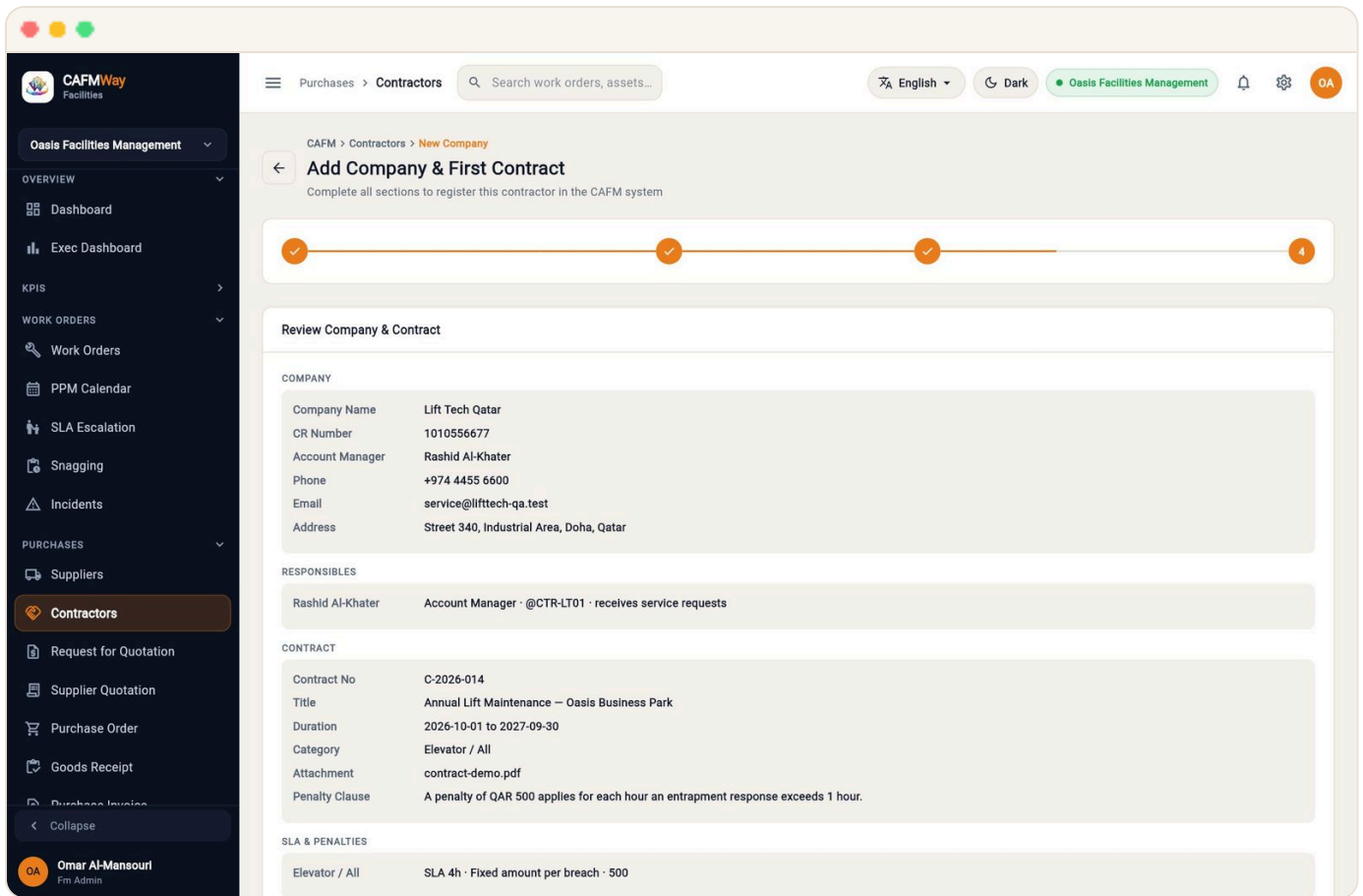


Figure 43 Review of company, responsible persons, contract and SLA

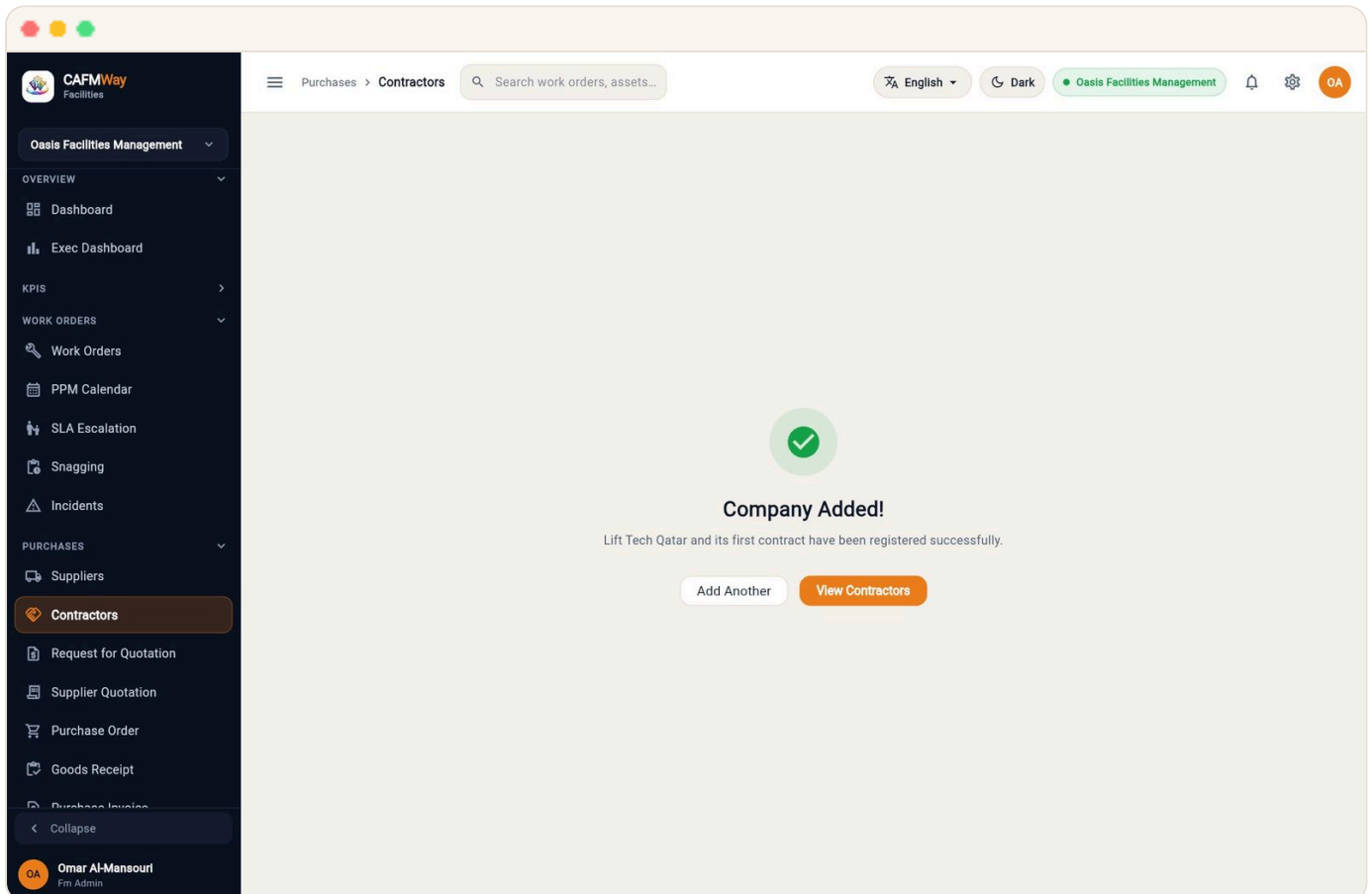


Figure 44 Saved

Route work to the contractor: covered classifications

The contract says which trade the contractor does. **Covered classifications** make CAFM actually send work to them. You add them by editing the contract after you save the company.

- 1 Open the contractor, go to **Contracts** and click the pencil on the contract.
- 2 Under **Covered Classifications**, click **Add Classification**.
- 3 Choose the work **category**, and optionally one **sub-category**, then click **Save**.
- 4 Check that the contract's start date is today or earlier and its status is active, then click **Save Changes**.

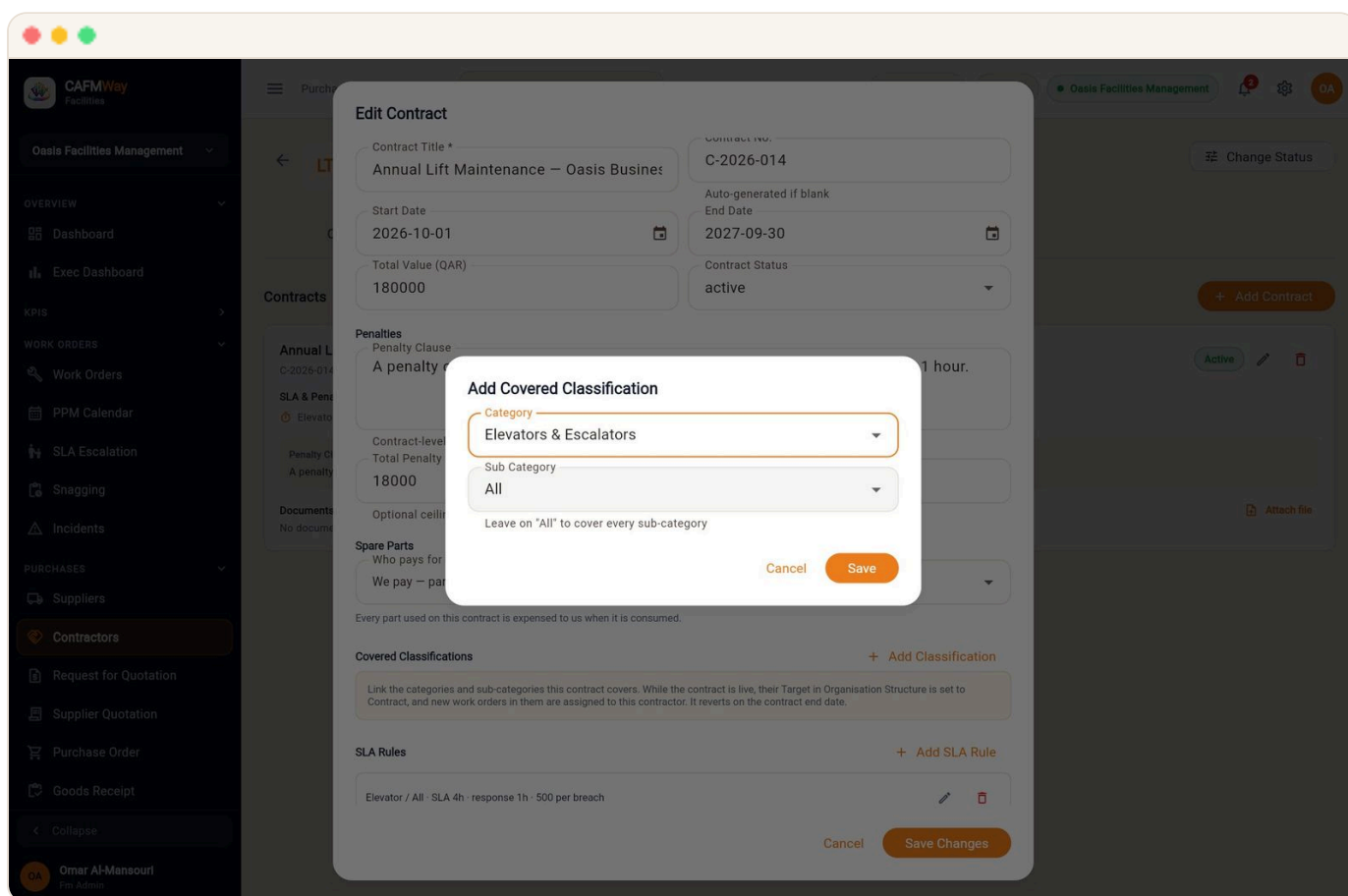


Figure 45 Covering the Elevators & Escalators category

Edit Contract

Contract Title * Annual Lift Maintenance - Oasis Business

Contract ID C-2026-014

Start Date 2026-10-01

Auto-generated if blank End Date 2027-09-30

Total Value (QAR) 180000

Contract Status active

Penalties

Penalty Clause A penalty of QAR 500 applies for each hour an entrapment response exceeds 1 hour.

Contract-level wording: SLA rules inherit it unless they define their own.

Total Penalty Cap (QAR) 18000

Optional ceiling on all penalties for this contract

Spare Parts

Who pays for spare parts We pay - parts billed to us

Every part used on this contract is expensed to us when it is consumed.

Covered Classifications + Add Classification

Elevators & Escalators / All

SLA Rules + Add SLA Rule

Elevator / All - SLA 4h - response 1h - 500 per hour

Cancel Save Changes

Figure 46 The edited contract: dates, penalties, covered classifications and SLA rules

While the contract is active and within its dates, the category's executor changes from **Local Team** to **Contract**, with a lock and the note *"Set by contract C-2026-014 · Lift Tech Qatar · until 2027-09-30. Reverts to Local Team when the contract ends."* New work orders in that category are routed to the contractor.

CAUTION

When you create a work order, the contractors offered are matched by **trade**: the category's English name must be exactly the same as one of the contractor's trades. Lift Tech Qatar's trade is *Elevator*, so Oasis renamed its lift category in English from *Elevators & Escalators* to **Elevator** (code and Arabic name unchanged). Check the names match before relying on contractor routing.

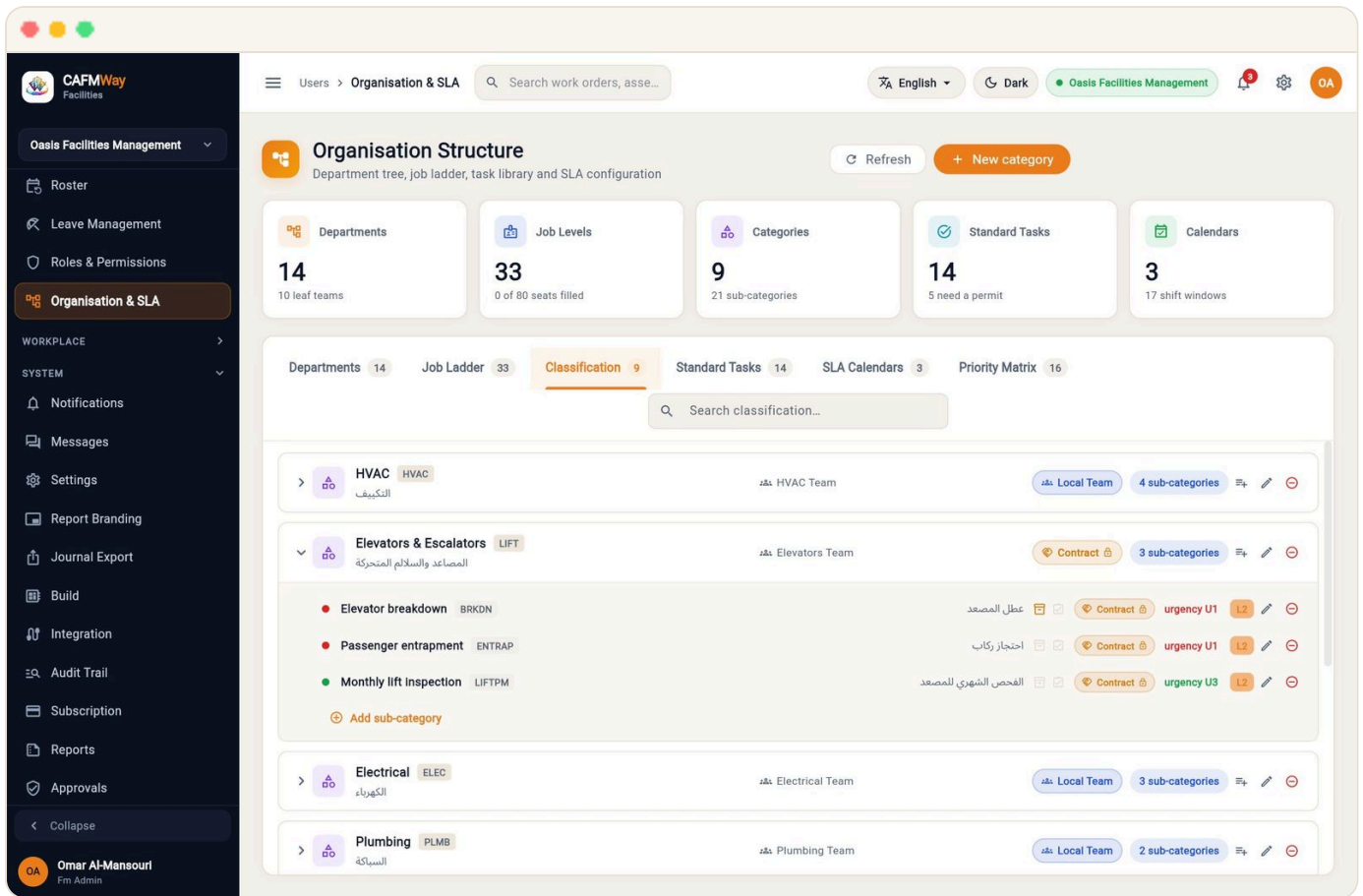


Figure 47 Organisation & SLA → Classification: the lift category and its sub-categories are now set by the contract

BUSINESS RULE

You don't switch a category to "Contract" by hand: the system derives it from active contracts. A contract dated in the future, a paused or expired contractor, or a cancelled contract gives the work back to the local team. Before you change a contractor's status, CAFM warns you if a category would be left without cover or if the contractor still has open work orders.

The contractor's page

Click a contractor to open its page. **Change Status** at the top pauses, reactivates, expires or terminates the company. The tabs:

Tab	Shows
Overview	Active contracts, responsible persons, penalties and amount outstanding; company information; categories covered
Responsibles	The contractor's users, with Add Responsible and Edit
Contracts	Every contract with its dates, value and file. Add Contract adds another, for example a second category
Penalties	Penalties raised for SLA breaches under this contractor's contracts
Financials	Contract values, penalties and what is outstanding
Work Orders	The work orders routed to this contractor

The screenshot shows the CAFMWay web application interface. On the left is a dark sidebar with the CAFMWay logo and a menu for 'Oasis Facilities Management' containing sections like Overview, Work Orders, Purchases, and Contractors. The main content area is titled 'Purchases > Contractors' and features a search bar. The contractor 'Lift Tech Qatar' is selected, with a status of 'Active' and a 'Change Status' button. Below the header are tabs for Overview, Responsibles (1), Contracts (1), Penalties (0), Financials, and Work Orders (0). The Overview tab is active, displaying four summary cards: Active Contracts (1), Responsibles (1), Penalties (0 QAR), and Outstanding (0 QAR). A 'Company Information' section lists details such as Company Name, CR Number, Account Manager, Phone, Email, Address, Website, and Status. A 'Categories Covered' section shows 'Elevator'.

Category	Value
Active Contracts	1
Responsibles	1
Penalties	0 QAR
Outstanding	0 QAR

Field	Value
Company Name	Lift Tech Qatar
CR Number	1010556677
Account Manager	Rashid Al-Khater
Phone	+974 4455 6600
Email	service@liftech-qa.test
Address	Street 340, Industrial Area, Doha, Qatar
Website	www.liftech-qa.test
Status	Active

Category
Elevator

Figure 48 Contractor overview: Lift Tech Qatar covers Elevator

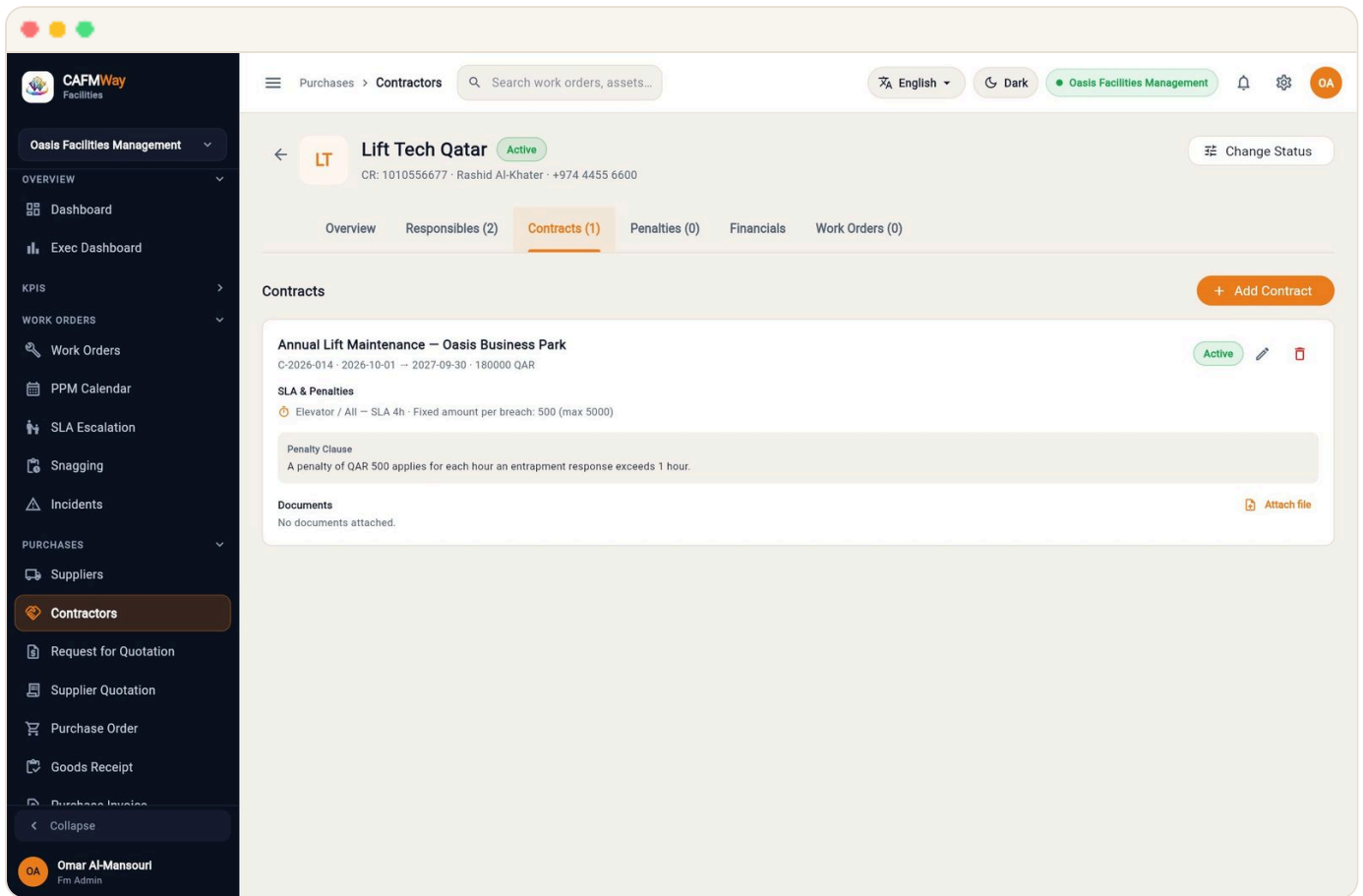


Figure 49 Contracts

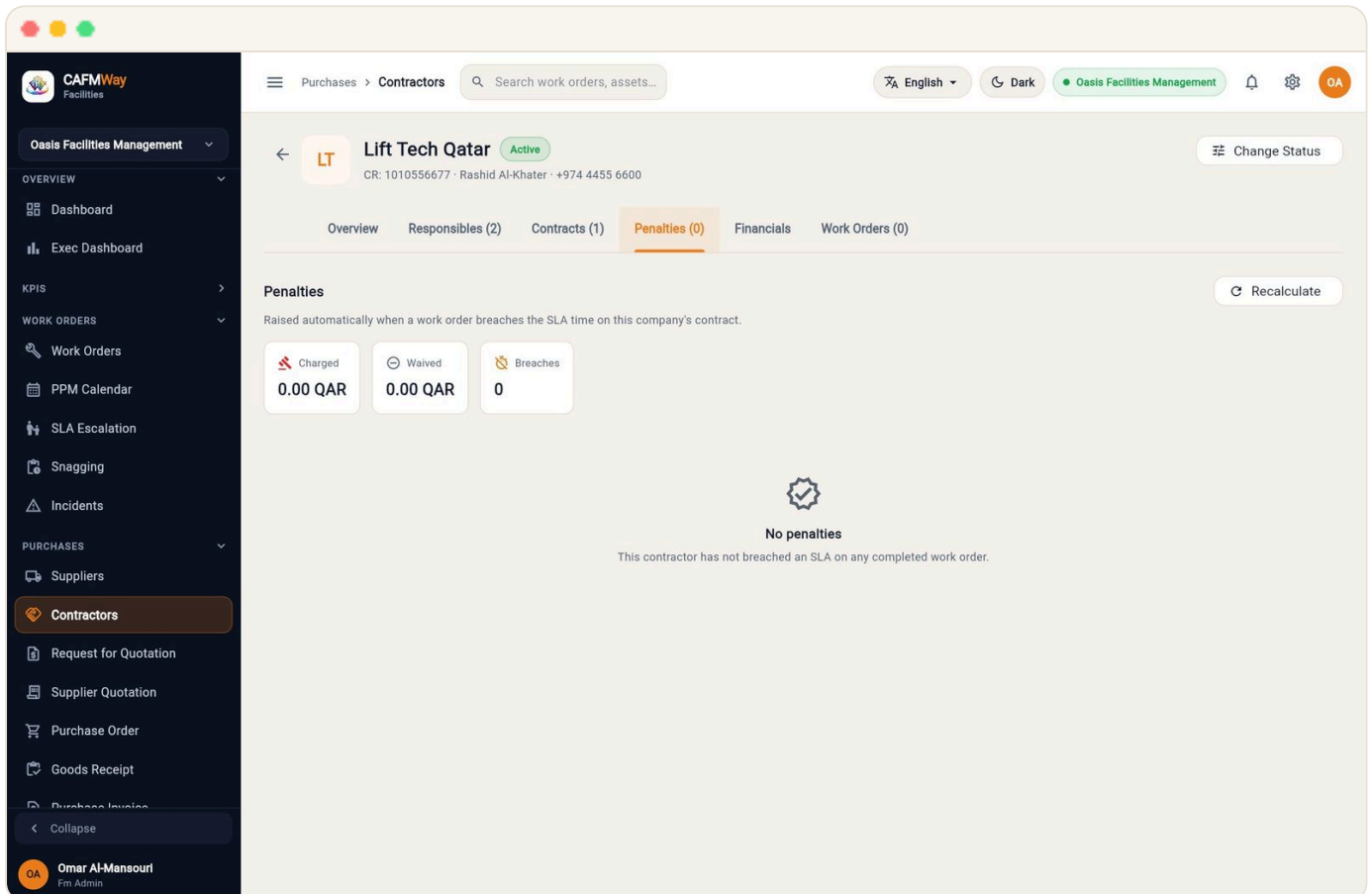


Figure 50 Penalties

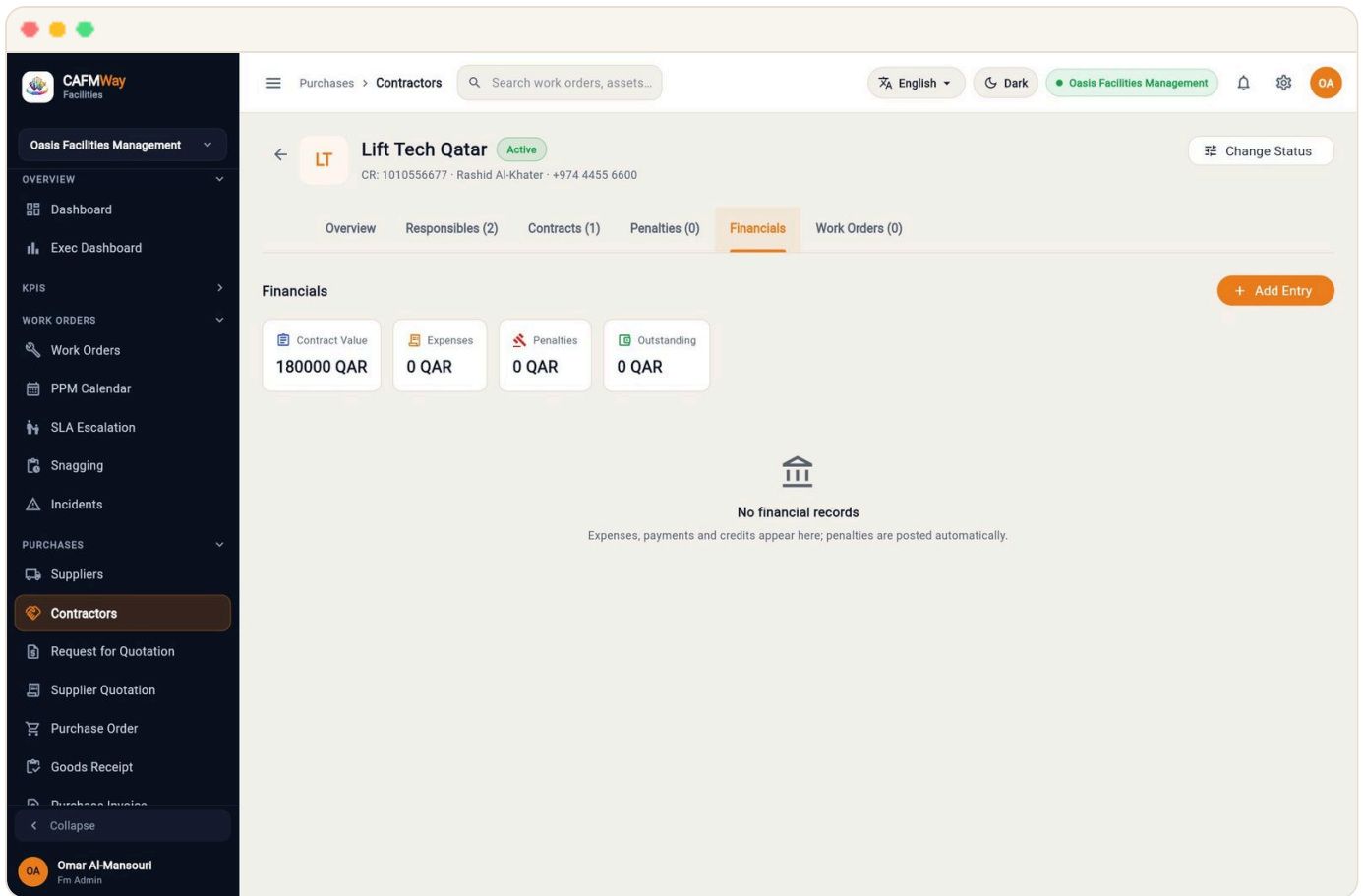


Figure 51 Financials

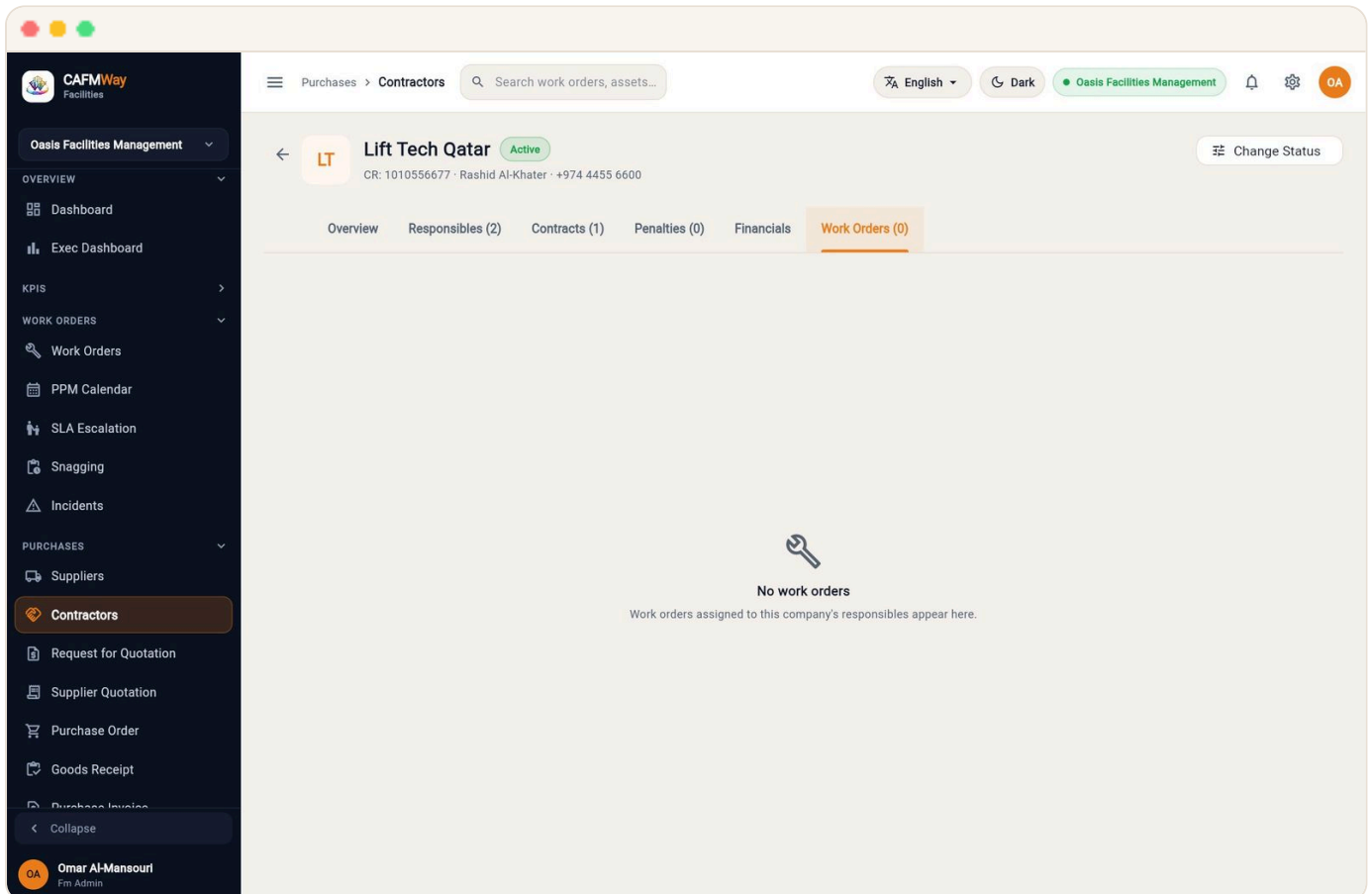


Figure 52 Work orders routed to the contractor

Contractor users

Contractor staff sign in to the **Technician app** with the username or email and password set here. They only see work for their own company.

- 1 Open the contractor and go to **Responsibles**.
- 2 Click **Add Responsible**.
- 3 Enter the name, username, email, password (twice) and phone, and choose the **role**.
- 4 Tick **Will receive service request** if this person should be notified of new work.
- 5 Click **Add Responsible**.

The screenshot displays the CAFMWay web application interface. On the left is a dark sidebar with a menu including 'Oasis Facilities Management', 'OVERVIEW', 'WORK ORDERS', and 'PURCHASES'. The main content area shows the 'Contractors' section with a list of contractors. 'Lift Tech Qatar' is selected, showing details like 'CR: 1010556677', 'Rashid Al-Khater', and '+974 4455 6600'. An 'Add Responsible' modal is open in the center, containing the following fields and options:

- Full Name ***: Text input with 'Sami Nasser'.
- Username ***: Text input with 'CTR-LT02'.
- Email**: Text input with 'sami@liftech-qa.test'.
- Password ***: Password input field.
- Confirm Password ***: Password input field.
- Phone**: Text input with '+974 5550 3402'.
- Role**: Dropdown menu set to 'Technician'.
- Will receive service request**: A checked checkbox with the text 'New service requests and work orders for this company are notified to this person.'

At the bottom of the modal are 'Cancel' and 'Add Responsible' buttons. The background shows a list of 'Responsibles' for the selected contractor.

Figure 53 Adding a contractor technician

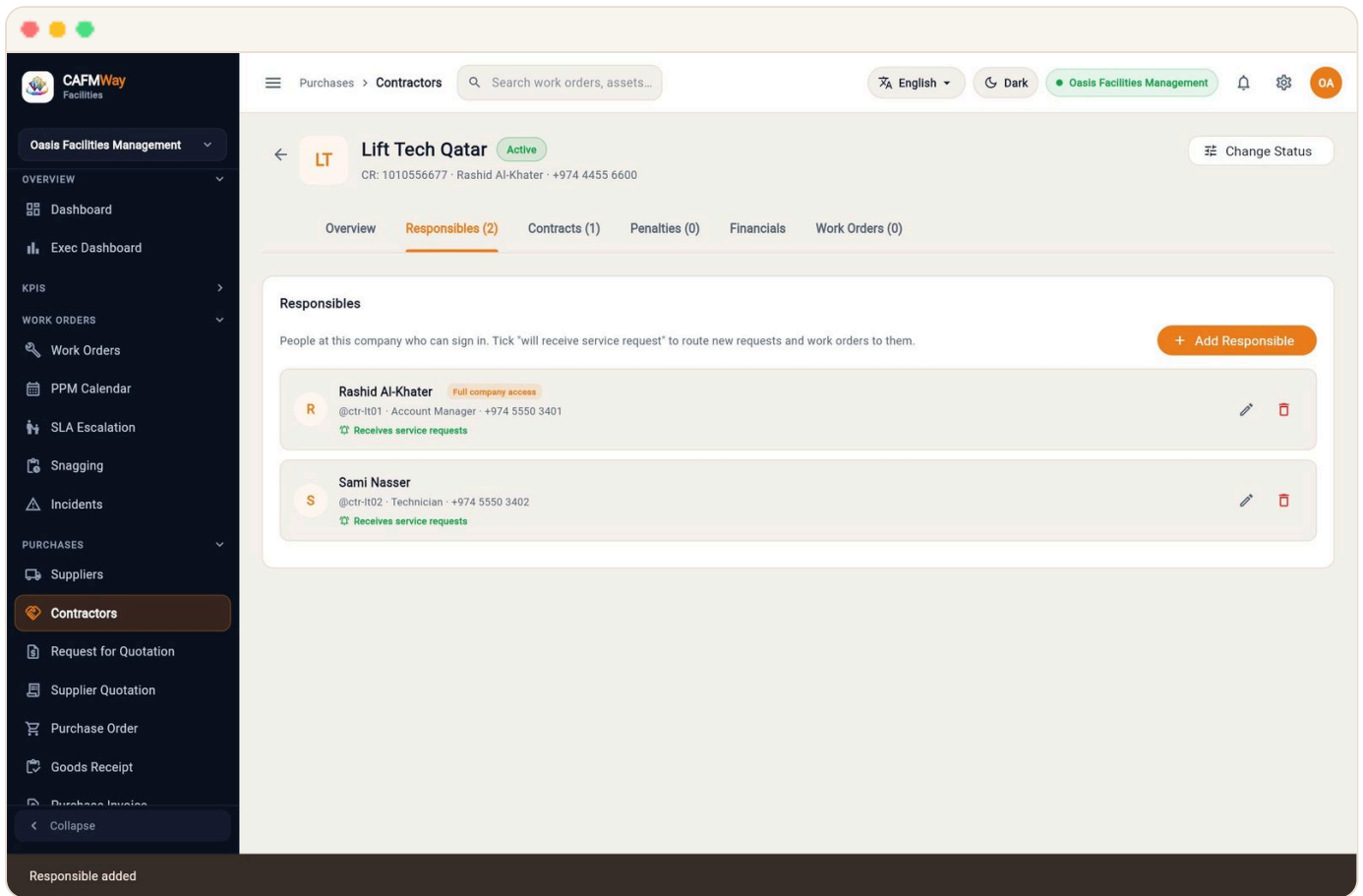


Figure 54 The contractor now has an account manager and a technician

Each contractor user also appears under **Users & Roles** with the role *Contractor* and a CTR employee number, for example **CTR-9129**, and uses one of your subscription's user seats. To stop a person's access, edit them here or deactivate them in **Users & Roles**.

EXAMPLE

Oasis registered **Lift Tech Qatar**:

- Contract C-2026-014: annual lift maintenance, 1 Sep 2026 to 30 Sep 2027, QAR 180,000, covering *Elevators & Escalators*.
- SLA: 4-hour fix time, with a QAR 500 penalty per breach.
- Users: Rashid Al-Khater (account manager) and Sami Nasser (technician).

From then on, a lift breakdown reported in Tower A becomes a work order for Lift Tech Qatar, Sami receives it in the Technician app, and a late fix raises a penalty on the contractor's **Penalties** tab. The Work orders section follows this example.

Work orders, helpdesk, PPM and SLA

This part covers maintenance work in the tenant web app: helpdesk tickets, work orders from creation to closure, contractor work, the SLA clock and its escalations, planned preventive maintenance (PPM), approvals, snags and incidents. It is written for helpdesk agents, supervisors, FM managers and FM administrators. Technicians and requesters do their part of the job in the mobile apps; see the Technician app guide and the Requestor app guide.

Work orders at a glance

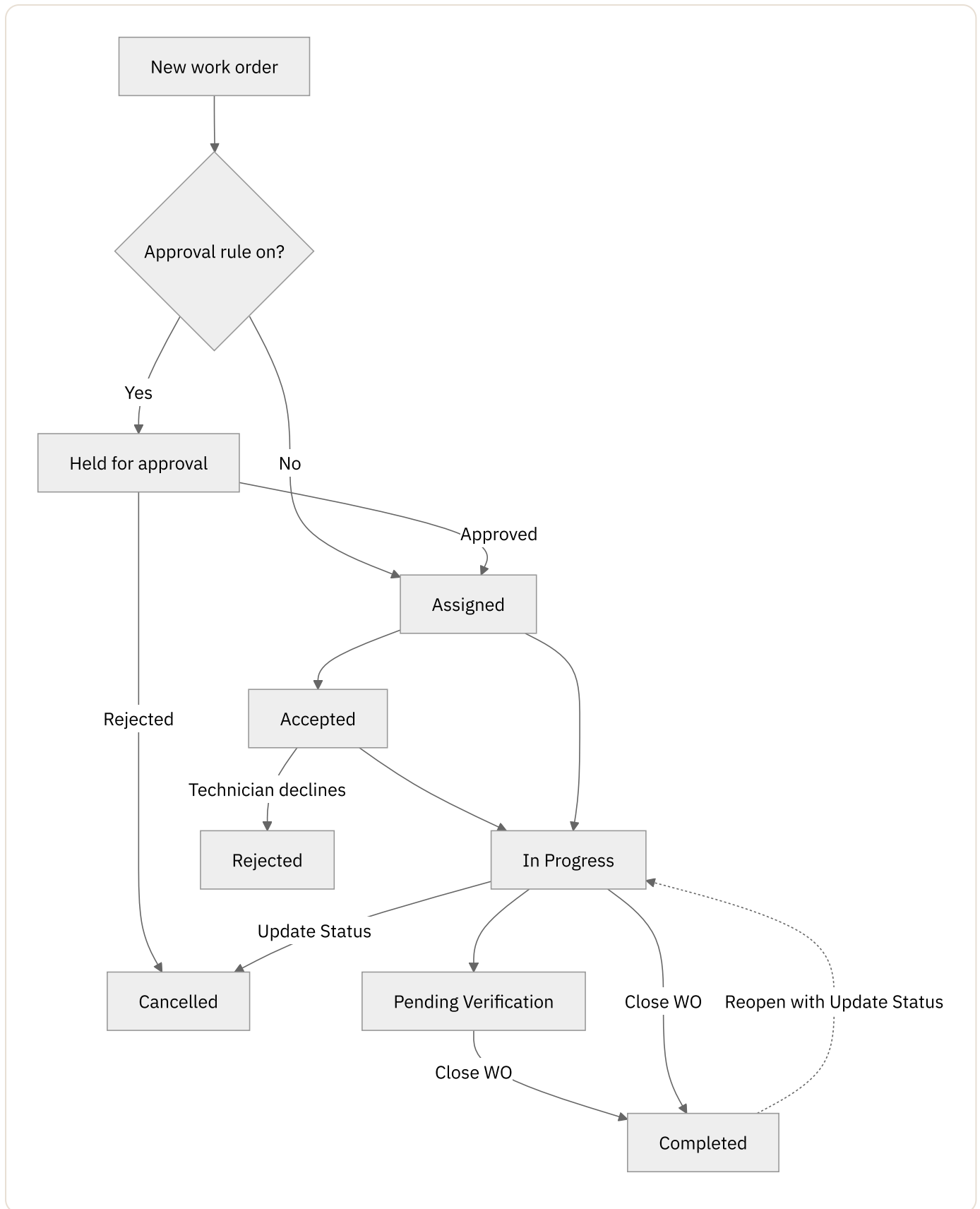
Who: everyone who raises, dispatches or follows maintenance work

Where: Sidebar → WORK ORDERS → **Work Orders, PPM Calendar, SLA Escalation, Snagging, Incidents**; Dashboard → **Quick Actions**

A work order is one job for one location or asset. It can start in five places:

- a helpdesk agent raises it from a ticket or directly in the web app,
- a requester raises a request in the Requestor app (a ticket and a work order are created together),
- a PPM plan generates it on its due date,
- an incident creates it as a corrective action,
- a technician raises it in the Technician app.

Every new work order starts in **Assigned**, even when nobody is assigned yet. From there it moves as shown below.



Status on screen	Meaning	Who moves it, and where
Assigned	The job exists and is waiting for the technician, team or contractor. It is also the status of an unassigned job.	Created by the web wizard, the Requestor app, a PPM plan or an incident.
Accepted	The technician has accepted the job but not started.	The technician taps Accept in the Technician app. In the web app, Update Status .
In Progress	Work has started. The first start is recorded as the response time for the SLA.	The technician taps Start Work in the Technician app. In the web app, Update Status .
Pending Verification	The technician says the work is done and asks for it to be checked.	The technician sends the job to the supervisor in the Technician app. In the web app, Update Status .
Completed	The job is closed. The SLA result is fixed and contractor penalties are worked out.	Close WO in the web app, Confirm Complete in the Technician app, or Update Status .
Cancelled	The job will not be done. Stock held for it is released.	Update Status in the web app, or an approver rejects a held work order.
Rejected	The technician declined the job, with a reason.	The technician declines in the Technician app. In the web app, Update Status .

NOTE

The list filter also offers **OCC Verification** and **SP Verification**. No screen moves a work order into these statuses yet, so they stay empty.

BUSINESS RULE

Update Status in the web app can set any status from any status. It is the way to reopen a completed, cancelled or rejected job, and every change is written to the job's timeline. There is no separate hold status. To stop the SLA clock while a job waits, put a hold on it from the SLA Escalation board (see "SLA targets, holds and breaches").

Work order list

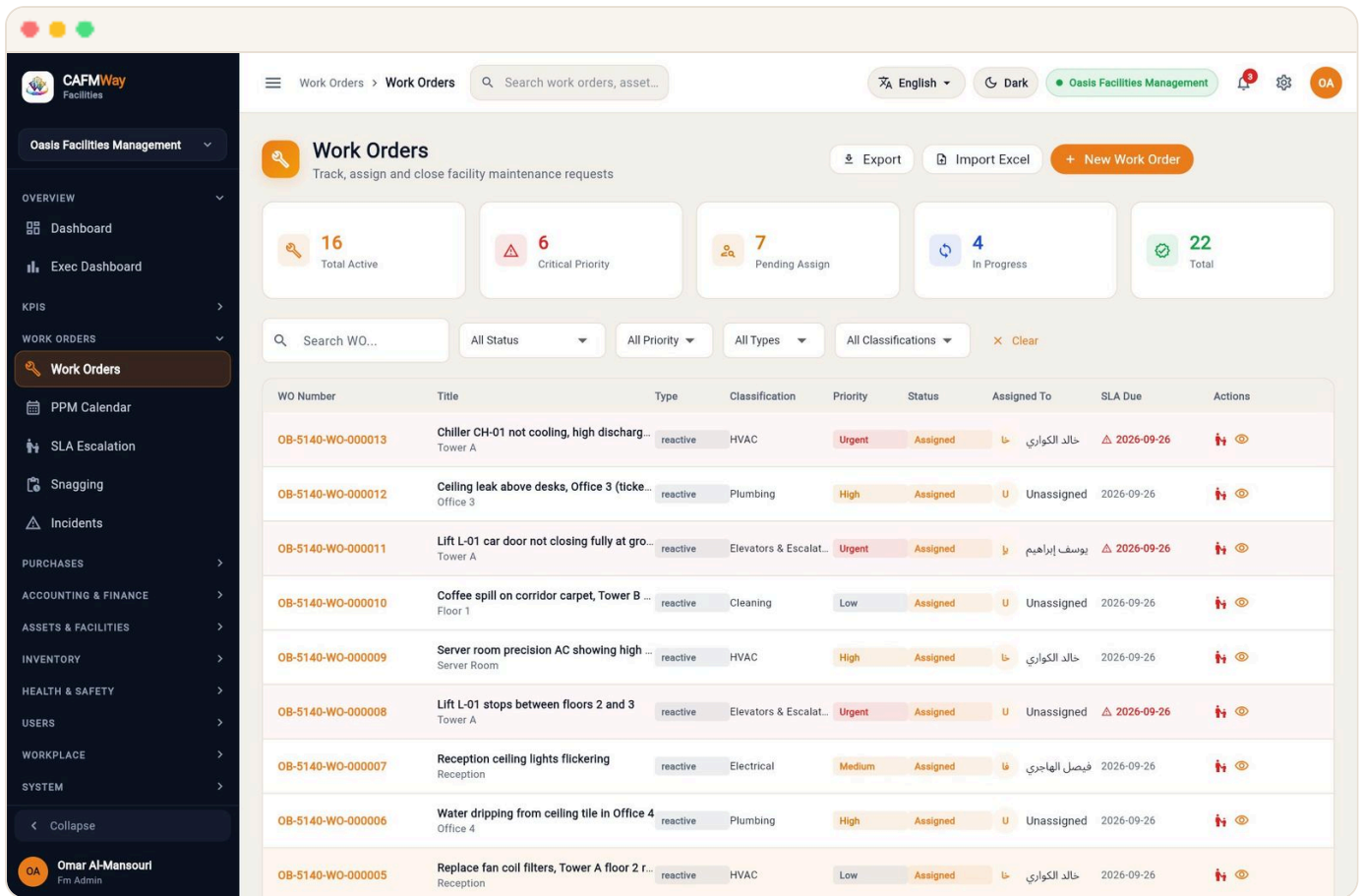


Figure 55 The Work Orders list with the KPI tiles, filters and the day's jobs.

The list shows the number, title, type, classification, priority, status, assignee and SLA due date of each job. The tiles at the top count **Total Active**, **Critical Priority**, **Pending Assign**, **In Progress** and **Total**. Use **Search WO...** to find a job by number, title or location, and the status, priority and classification filters to narrow the list. Click the eye icon (**View**) to open a job.

NOTE

The type filter (**Preventive**, **Corrective**, **Emergency**, **Inspection**) does not narrow the list yet. To find PPM jobs, search for the plan or asset name instead.

Raise and triage a helpdesk ticket

Who: Helpdesk Agent, Supervisor, FM Manager, FM Administrator

Where: Dashboard → **Quick Actions** → **Raise Ticket**

A ticket records what an occupant reported, before anyone decides what work is needed. The helpdesk logs it, replies to the requester, raises the work order that fixes the problem and resolves the ticket when the work is done. Tickets have no sidebar entry; you reach the list from the ticket form or from global search.

Log the ticket

- 1 On the Dashboard, under **Quick Actions**, click **Raise Ticket**. The **Raise New Helpdesk Ticket** form opens with four steps.
- 2 On **Request Details**, fill **Subject ***, choose **Category ***, **Priority *** and **Urgency**, and describe the problem in **Description**. Click **Continue**.

Figure 56 Step 1 of a new ticket for a ceiling leak, with category Plumbing, priority High and urgency Urgent.

- 3 On **Location & Asset**, pick the room in **Building / Floor / Zone ***. If one asset is involved, type its code in **Asset ID (optional)** or click **Scan QR**. Choose the **Impact / Affected Area**.

Click **Continue**.

The screenshot shows the 'Raise New Helpdesk Ticket' form in the CAFMWay web app. The progress bar at the top indicates four steps: 1. Request Details (completed), 2. Location & Asset (current step), 3. Requester Info, and 4. Review & Submit. The 'Location & Asset' section contains the following fields:

- Building / Floor / Zone ***: A dropdown menu with the selected value 'OB-5140-AR1-B1-F1-R3 – Office 3'.
- Asset ID (optional)**: A text input field with the placeholder 'e.g. AST-1042 – scan QR or type manually'.
- QR Scanner**: A button labeled 'Scan QR' with a QR code icon.
- Impact / Affected Area**: A dropdown menu with the selected value 'Single Room'.

At the bottom of the form, there are 'Previous' and 'Continue' buttons. The user's name 'Omar Al-Mansouri' and role 'Fm Admin' are visible in the bottom left corner.

Figure 57 Step 2 with Office 3 on Tower A Floor 1 selected and the impact set to a single room.

4

On **Requester Info**, enter the person who reported it: **Full Name ***, **Email Address**, **Phone Number**, **Department** and **Preferred Contact Method**. Click **Continue**.

The screenshot shows the 'Raise New Helpdesk Ticket' form in the CAFMWay web app, now at Step 3: Requester Info. The progress bar shows the first two steps completed. The 'Requester Information' section contains the following fields:

- Full Name ***: A text input field with the value 'Hamad Al-Marri'.
- Email Address**: A text input field with the value 'hamad@oasis-fm.test'.
- Phone Number**: A text input field with the value '+974 5550 1208'.
- Department**: A dropdown menu with the selected value 'Finance'.
- Preferred Contact Method**: Three radio buttons labeled 'Email', 'Phone', and 'WhatsApp'. The 'WhatsApp' button is selected.

Below the form, there is a note: 'The requester will receive automated updates via email as the ticket progresses.' At the bottom, there are 'Previous' and 'Continue' buttons. The user's name 'Omar Al-Mansouri' and role 'Fm Admin' are visible in the bottom left corner.

Figure 58 Step 3 with the requester Hamad Al-Marri from Finance, who prefers WhatsApp.

- 5 Check the summary on **Review & Submit**. The **Expected SLA Response** box shows the response and resolution times for the chosen priority. Click **Submit Ticket**.

CAFMMWay Facilities

Oasis Facilities Management

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- Snagging
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ASSETS & FACILITIES

INVENTORY

HEALTH & SAFETY

USERS

WORKPLACE

SYSTEM

< Collapse

OA Omar Al-Mansouri Fm Admin

Helpdesk > Tickets Search work orders, assets, ti...

English Dark Oasis Facilities Management OA

CAFMM > Helpdesk > New Ticket

Raise New Helpdesk Ticket

Request Details Location & Asset Requester Info Review & Submit

Review Your Ticket

Subject Water dripping from the ceiling in Office 3

Category Plumbing

Priority High

Urgency Urgent

Location 08-5140-AR1-B1-F1-R3 - Office 3

Asset Not specified

Requester Hamad Al-Marri

Email hamad@oasis-fm.test

Attachments None

Expected SLA Response

Response within 2 hours - Resolution within 8 hours

Previous Submit Ticket

Figure 59 The review step with the expected SLA response for a High priority ticket.

- 6 **Ticket Submitted!** shows the ticket number, for example SR-2026-0002. Click **Raise Another** for the next call, or **View All Tickets**.

CAFMMWay Facilities

Oasis Facilities Management

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HEALTH & SAFETY

USERS

WORKPLACE

SYSTEM

< Collapse

OA Omar Al-Mansouri Fm Admin

Helpdesk > Tickets Search work orders, assets, ti...

English Dark Oasis Facilities Management OA

Ticket Submitted!

SR-2026-0002 has been created and sent to the Helpdesk team.

Raise Another View All Tickets

Figure 60 The confirmation after SR-2026-0002 was submitted.

The helpdesk team is notified and the requester receives a "We received your request" email.

CAUTION

Choose **High** or lower for now. A ticket with priority **Critical** is refused with "Requested value 'critical' was not found."

NOTE

On the web form, **Attachments**, **Urgency** and **Impact / Affected Area** are not stored with the ticket, and the asset code is saved as a location remark. Add photos from the ticket page after it is created (**Attach**), or in the work order.

Work the ticket

The screenshot displays the CAFM Way Helpdesk Tickets interface. The left sidebar contains navigation options: Overview (Dashboard, Exec Dashboard), KPIs, Work Orders (Work Orders, PPM Calendar, SLA Escalation, Snagging), Incidents, Purchases, Accounting & Finance, Assets & Facilities, Inventory, Health & Safety, Users, Workplace, and System. The main content area shows the 'Helpdesk Tickets' section with a search bar and filters for status, category, and priority. Below the filters are four summary cards: 5 Open Tickets (5 total), 1 Critical Priority (Immediate action required), 0 Resolved Closed tickets, and 5 Total All time. The main table lists tickets with columns: Ticket #, Subject, Category, Priority, Status, Requestor, SLA, Assigned To, and Actions. The table contains five rows of tickets, each with a detailed description of the issue.

Ticket #	Subject	Category	Priority	Status	Requestor	SLA	Assigned To	Actions
SR-2026-0005	Flickering lights in the Floor 2 corridor Three ceiling lights in the Tower B, Floor 2 corridor flicker on and off	Electrical	Low	Open	Omar Al-Mansouri	2026-09-26	Unassigned	View
SR-2026-0004	Air conditioning not cooling at Reception The reception area on Tower A, Floor 1 has been warm since noon. The thermostat shows 27 C against a set point of 22 C.	HVAC	Medium	Open	Omar Al-Mansouri	2026-09-26	Unassigned	View
SR-2026-0003	Water is dripping from a stained ceiling tile above the meeting table in Office 4, Tower A Floor 2. We put a bucket under it.	Plumbing	High	Open	حمد المري	2026-09-26	Unassigned	View
SR-2026-0002	Water dripping from the ceiling in Office 3 Water is dripping from a ceiling tile above the desks in Office 3, Tower A, Floor 1. Staff moved their laptops. It started this morning at about 08:30 and a bucket is catching the water.	Plumbing	High	Open	Omar Al-Mansouri	2026-09-26	Unassigned	View
SR-2026-0001	Since this morning the air handling unit on Tower A is making a loud rattling noise and the offices on Floor 2 are warm (about 28 °C). Water is collecting under the unit.	HVAC	Critical	Open	حمد المري	2026-09-26	Unassigned	View

Figure 61 The Helpdesk Tickets list with open tickets from the web and from the Requestor app.

- 1 On **Helpdesk Tickets**, find the ticket with **Search ticket, subject, requestor...** or the status, category and priority filters, and click **View**.
- 2 The ticket page shows the priority, status and category, the **SLA Remaining** timer, the **Requester** card and the **Conversation Thread**.

- 3 To answer the requester, type in **Add Reply** and click **Send Reply**. The reply appears in the thread and in the requester's app.
- 4 To leave a note for colleagues only, tick **Internal note** before you click **Send Reply**. Internal notes are marked **INTERNAL** and are hidden from the person who raised the ticket.

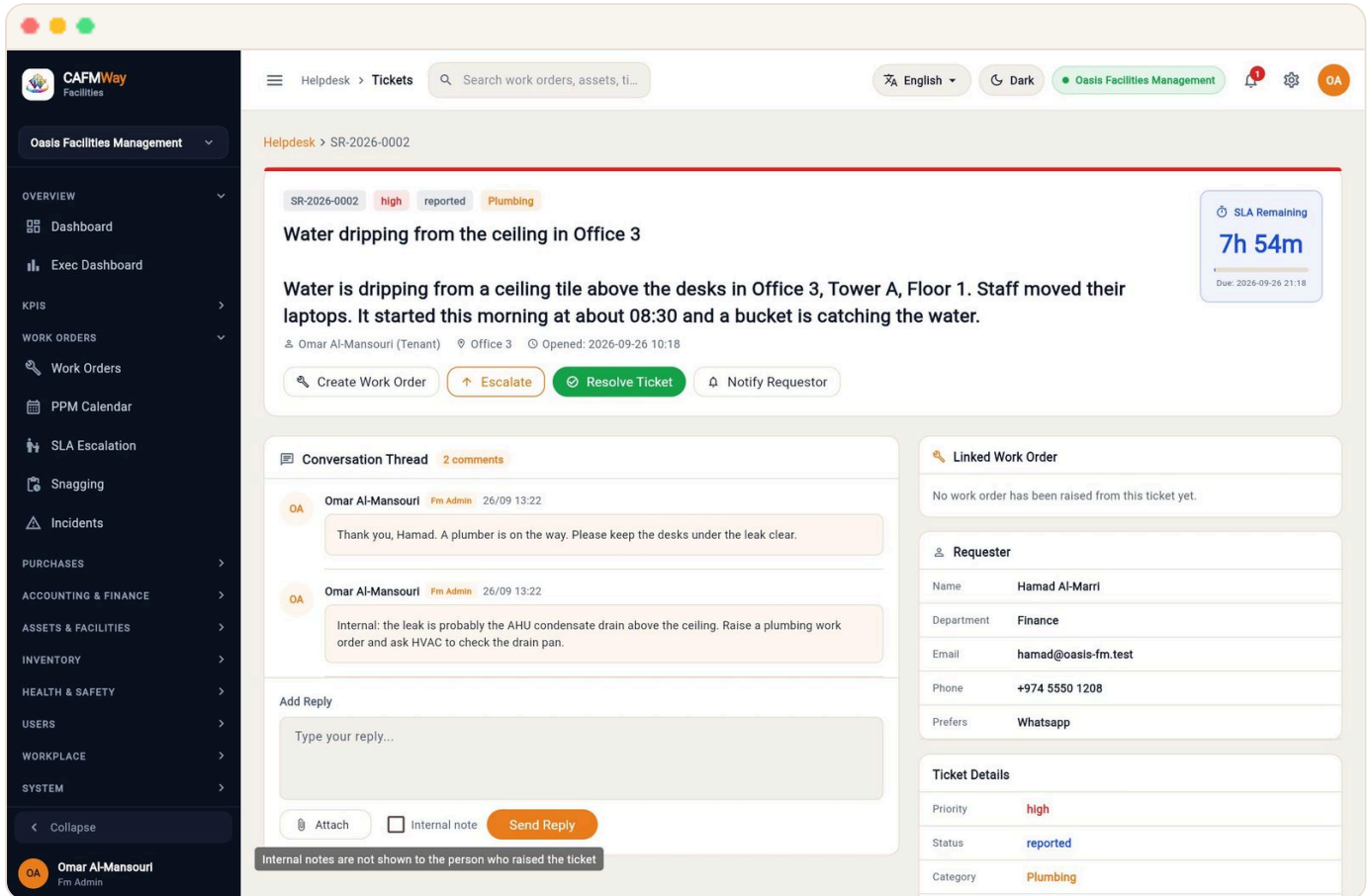


Figure 62 Ticket SR-2026-0002 with a reply to the requester and a note for the team.

BUSINESS RULE

A ticket logged in the web app is recorded as raised by the agent who logged it. On such a ticket the **Internal note** tick has no effect for that agent: the note is saved as a normal reply. Internal notes work on tickets raised by someone else, such as requests from the Requestor app.

Raise the work order

- 1 On the ticket page, click **Create Work Order**. The work order wizard opens empty.
- 2 Complete the wizard as described in "Create a work order". Put the ticket number in the title or description, for example
Ceiling leak above desks, Office 3 (ticket SR-2026-0002) , so the two can be found together.

- 3 After the work order is created you return to the ticket. Add a reply with the work order number, for example "Work order OB-5140-WO-000012 has been raised for the Plumbing Team."

NOTE

The work order raised this way is not linked to the ticket yet: the **Linked Work Order** card keeps saying "No work order has been raised from this ticket yet." Requests raised in the Requestor app are linked automatically. The ticket status does not follow the work order either; resolve the ticket yourself when the work is done.

Resolve the ticket

- 1 When the work order is completed, open the ticket and click **Resolve Ticket**.
- 2 Describe the fix in **Resolution Notes** and choose a **Resolution Category: Repair Completed, Replaced Equipment, No Issue Found, User Training or External Contractor**.
- 3 Click **Mark as Resolved**. The ticket becomes **Resolved**, the SLA box shows **Resolved**, and the requester is notified by email and can rate the service in the Requestor app.

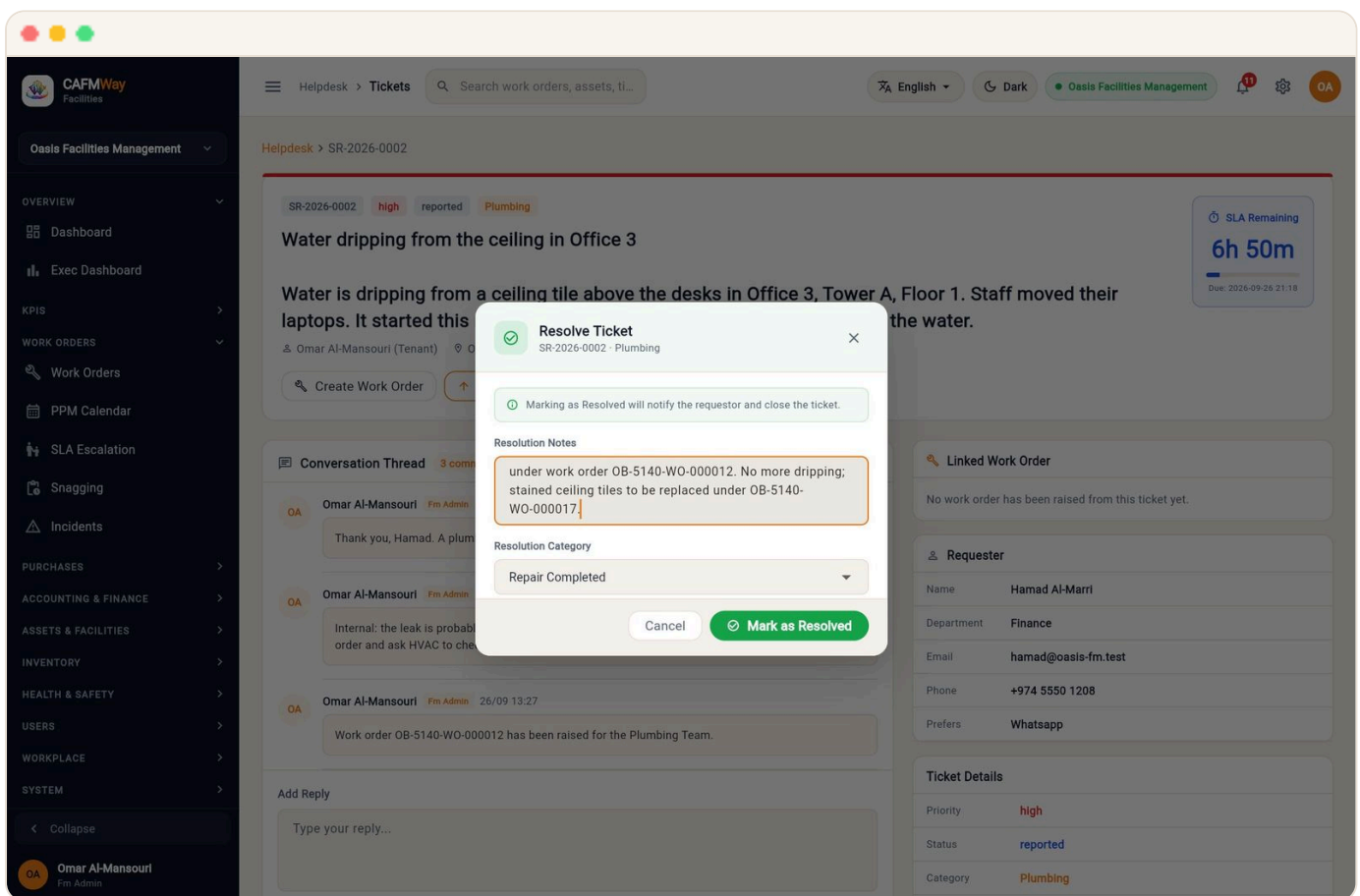


Figure 63 The Resolve Ticket dialog with the resolution notes for the Office 3 leak.

Helpdesk > Tickets

Search work orders, assets, ti...

English Dark Oasis Facilities Management

Helpdesk > SR-2026-0002

SR-2026-0002 high completed Plumbing

Water dripping from the ceiling in Office 3

Water is dripping from a ceiling tile above the desks in Office 3, Tower A, Floor 1. Staff moved their laptops. It started this morning at about 08:30 and a bucket is catching the water.

Omar Al-Mansouri (Tenant) Office 3 Opened: 2026-09-26 10:18

Create Work Order Escalate Resolve Ticket Notify Requestor

SLA Remaining Resolved Due: 2026-09-26 21:18

Conversation Thread 3 comments

Omar Al-Mansouri Fm Admin 26/09 13:22

Thank you, Hamad. A plumber is on the way. Please keep the desks under the leak clear.

Omar Al-Mansouri Fm Admin 26/09 13:22

Internal: the leak is probably the AHU condensate drain above the ceiling. Raise a plumbing work order and ask HVAC to check the drain pan.

Omar Al-Mansouri Fm Admin 26/09 13:27

Work order OB-5140-WO-000012 has been raised for the Plumbing Team.

Add Reply

Type your reply...

Linked Work Order

No work order has been raised from this ticket yet.

Requester

Name Hamad Al-Marri

Department Finance

Email hamad@oasis-fm.test

Phone +974 5550 1208

Prefers Whatsapp

Ticket Details

Priority high

Status completed

Category Plumbing

Figure 64 Ticket SR-2026-0002 after it was resolved.

NOTE

Escalate and **Notify Requestor** on the ticket page are not available yet. The requester is notified when you reply and when the ticket is resolved.

Create a work order

Who: anyone with the Work Order Create permission (Helpdesk Agent, Supervisor, FM Manager, FM Administrator)

Where: Sidebar → WORK ORDERS → **Work Orders** → **New Work Order**, or Dashboard → **Quick Actions** → **New Work Order**

The wizard has four steps: **Basic Info**, **Assignment**, **Schedule** and **Review**. The example raises a job on the Tower A chiller.

Step 1: Basic Information

- 1 Click **New Work Order**. The **Create Work Order** wizard opens.
- 2 Click **Scan / Lookup** in the **Scan Asset Or Location QR** box. In the dialog, scan the asset's QR label, type its code and click **Lookup**, or pick it from the **Assets** or **Locations** tab.

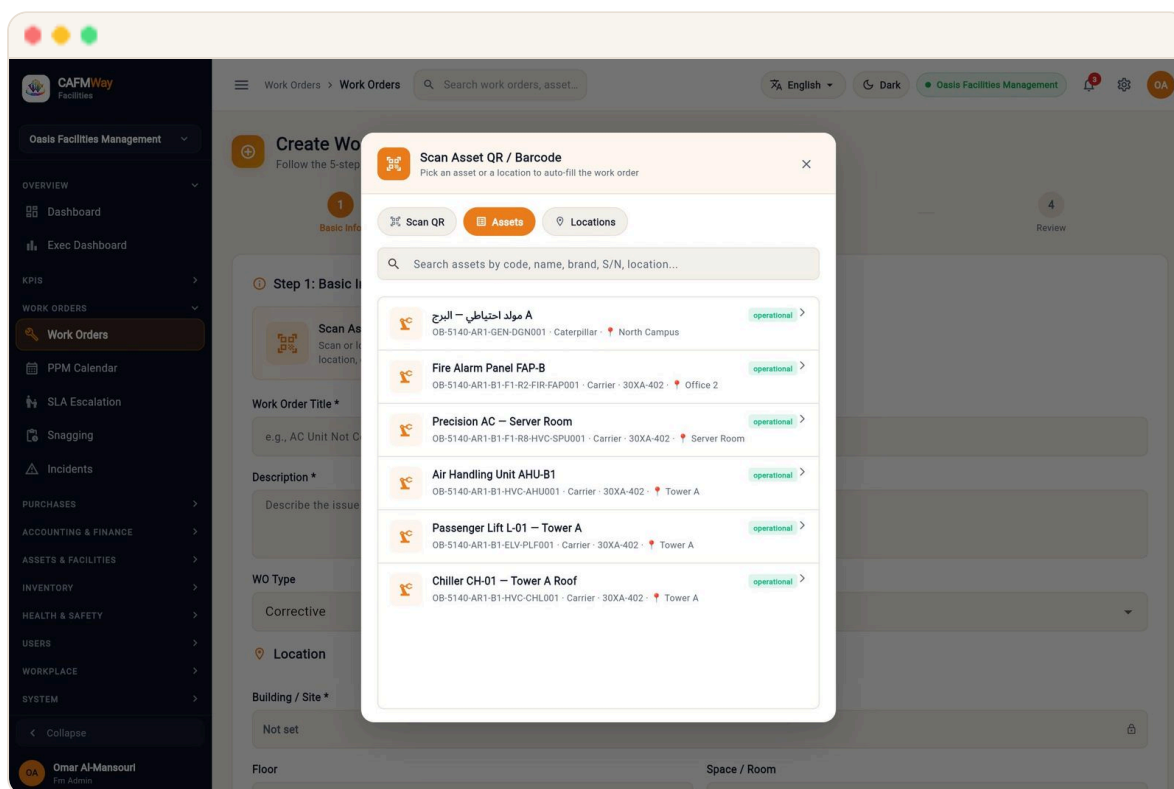


Figure 65 The asset picker with the Tower A assets, including Chiller CH-01 on the roof.

- 3 Picking an asset fills the title, description, location and priority for you, and shows **ASSET SCANNED** with the asset code. Picking a location shows **LOCATION SELECTED** and a "Service Required" title. Click **Change** to pick again.

- 4 Rewrite **Work Order Title *** and **Description *** so the technician knows what to do.
- 5 Choose the **WO Type: Corrective, Preventive, Emergency** or **Inspection**.
- 6 Choose the **Priority: Low, Medium, High** or **Critical**. Critical is shown as **Urgent** on the list.
- 7 The **Location** fields (**Building / Site ***, **Floor, Space / Room, GPS / QR Tag**) are filled from the asset or location and cannot be typed in.
- 8 Click **Next Step**.

The screenshot shows the 'Create Work Order' interface in the CAFMWay web application. The left sidebar contains a navigation menu with categories like Overview, KPIs, Work Orders, PPM Calendar, SLA Escalation, Snagging, Incidents, Purchases, Accounting & Finance, Assets & Facilities, Inventory, Health & Safety, Users, Workplace, and System. The 'Work Orders' section is currently active. The main content area is titled 'Create Work Order' and includes a 'Back to List' button. A progress bar at the top indicates four steps: 1. Basic Info (active), 2. Assignment, 3. Schedule, and 4. Review. The 'Step 1: Basic Information' section contains the following fields:

- ASSET SCANNED:** Chiller CH-01 — Tower A Roof (OB-5140-AR1-B1-HVC-CHL001 - Carrier - 30XA-402 - Tower A) with a 'Change' button.
- Work Order Title *:** Chiller CH-01 not cooling, high discharge pressure alarm
- Description *:** The BMS shows chiller CH-01 on the Tower A roof tripping on high discharge pressure since 10:40. Chilled water leaving temperature is 13 C against 7 C. Check the condenser fans and coil, reset the alarm and confirm stable operation.
- WO Type:** Corrective (selected from a dropdown menu)
- Priority:** High (selected from a dropdown menu)
- Location:** Auto-filled location from asset 'OB-5140-AR1-B1-HVC-CHL001' → Tower A
- Building / Site *:** Tower A
- Floor:** (empty field)
- Space / Room:** (empty field)

Figure 66 Step 1 filled in for Chiller CH-01, which tripped on high discharge pressure.

Field	What it does
Work Order Title *	Short name of the job, shown on every list. Required.
Description *	What is wrong and what to do. Required.
WO Type	Corrective and Emergency are saved as corrective work, Preventive as PPM work, Inspection as an inspection.
Priority	Sets the SLA targets (see "SLA targets, holds and breaches").
Building / Site *, Floor, Space / Room	Come from the scanned asset or picked location. A job needs one of them.
GPS / QR Tag	The code of the asset or location.
Attachments	Not available yet. Add photos on the Before & After tab after the job is created.

BUSINESS RULE

When the job is linked to an asset, it is saved with the priority that matches the asset's criticality, even if you change **Priority**. Chiller CH-01 is a critical asset, so its work orders are saved as **Urgent**.

Step 2: Assignment

The category and sub-category decide who may do the job. Each sub-category has a target that is shown as a chip next to **Assign To**:

Chip	Who is offered in Assign To
Local Team	Your own maintenance teams for that category and their members. A person without a skill record for the category is marked "· no skill record".
Contract	Active contractor companies that cover the category.
Both	Teams, technicians and contractors.

The target is set in Organisation & SLA. A live contract that covers the category overrides it: while the contract runs, the chip reads **Contract**, and it returns to the category's own setting when the contract ends.

- 1 Choose the **Category / Trade ***, for example **HVAC**.

- 2 Choose the **Sub-category**, for example **No cooling**. The chip and the list in **Assign To** update.
- 3 Open **Assign To** and pick a team or a person. The green note under the fields says how many qualified technicians and teams can take the sub-category.

The screenshot shows the 'Create Work Order' wizard in the CAFMWay application. The current step is 'Step 2: Assignment'. The 'Category / Trade' is set to 'HVAC' and the 'Sub-category' is 'No cooling'. The 'Assign To' dropdown is open, showing a list of potential assignees: 'HVAC Team' (1 in team), 'Hard Services' (1 in team), and two department members: 'خالد الكواري' and 'مريم السليطي', both marked as 'department member - no skill record'. A green note at the bottom states: '0 qualified technicians (plus 2 from the department) and 2 team(s) can take this sub-category, which requires grade L1 or more senior. Auto-assignment applies if none is selected.' Navigation buttons at the bottom include 'Previous', 'Save as Draft', and 'Next Step'.

Figure 67 The Assign To list for HVAC, No cooling: the HVAC Team, Hard Services and two department members.

- 4 Leave **Assign To** empty to let the system choose: it picks a technician with a skill for the category who has the fewest open jobs. If nobody qualifies, the job waits unassigned for a supervisor.
- 5 Click **Next Step**.

Figure 68 Step 2 with the job assigned to Khalid Al-Kuwari and the Local Team chip.

NOTE

Related Asset (optional) and **Related Contract (optional)** are not saved yet. The asset from step 1 is the one linked to the job.

Step 3: Schedule & SLA

- 1 Set **Due Date ***, the day the work is planned for.
- 2 **Estimated Duration** shows the time from the sub-category's standard task, for example "1.5h on site".
- 3 **SLA Profile** and **SLA Timeline Preview** are for information. The real targets come from the priority (and, for contractors, from the contract's SLA rule).
- 4 Click **Next Step**.

CAFWay Facilities

Oasis Facilities Management

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ACCOUNTING & FINANCE

ASSETS & FACILITIES

INVENTORY

HEALTH & SAFETY

USERS

WORKPLACE

SYSTEM

Collapse

Omar Al-Mansouri
Fm Admin

Work Orders > Work Orders

Search work orders, asset...

English Dark Oasis Facilities Management

Create Work Order

Follow the 5-step wizard to log a new work order

Back to List

Basic Info Assignment Schedule Review

Step 3: Schedule & SLA

Due Date *

2026-09-27

Estimated Duration

1.5h on site

HVAC-DIAG-001 · 90 labour min + crew 1 = 1.5h on site

SLA Profile

Standard (8h response)

SLA Timeline Preview

Created Now Response Resolution Closure

Select a sub-category to resolve targets

Previous Save as Draft Next Step

Figure 69 Step 3 with the due date and the estimated duration from the HVAC standard task.

Step 4: Review & Confirm

- 1 Check the summary: title, type, priority, category, sub-category, location, assignee and due date. If **Assign To** was empty, the assignee reads "Auto-assign".
- 2 Click **Create Work Order**. "Work order created successfully" appears and the job is at the top of the list with the status **Assigned**.

The screenshot displays the 'Create Work Order' wizard in the CAFMWay application. The left sidebar shows the navigation menu with 'Work Orders' selected. The main content area shows the 'Step 4: Review & Confirm' screen. The wizard progress bar at the top indicates that 'Basic Info', 'Assignment', and 'Schedule' are completed, while 'Review' is the current step. The form fields are as follows:

Field	Value
Title	Chiller CH-01 not cooling, high discharge pressure alarm
Type	Corrective
Priority	High
Category	HVAC
Sub-category	No cooling
Building	Tower A
Floor	—
Space	—
Assignee	خالد الكواري
Due Date	2026-09-27
SLA Profile	Standard (8h response)

At the bottom of the form, a notification states: "Notifications will be sent to the assigned technician and the requester upon creation."

Figure 70 The review step before the chiller work order is created.

The job is numbered from the project code, for example `OB-5140-WO-000013` . The assigned technician receives a "New work order assigned" notification. An unassigned job notifies the supervisors and managers who dispatch work.

NOTE

Save as Draft is not available. A work order is created in one go.

Internal path: assign, work and close

Who: Supervisor, FM Manager, FM Administrator; the technician in the Technician app

Where: Work Orders → open a job

This is the life of a job done by your own staff, using the chiller fault **OB-5140-WO-000013** assigned to Khalid Al-Kuwari (HVAC Team).

- 1 **Assign.** Pick the technician in **Assign To** when you create the job (see "Create a work order"). Khalid is notified and the job appears in his Technician app.
- 2 **Reassign.** To give the job to someone else, open it and click **Reassign**. Search by name, job title or team, pick the person, write a **Reason (optional)** and click **Reassign**. The new person is notified and the reason is kept on the timeline. Choose **Unassign — return to the queue** to take the job away from everyone.

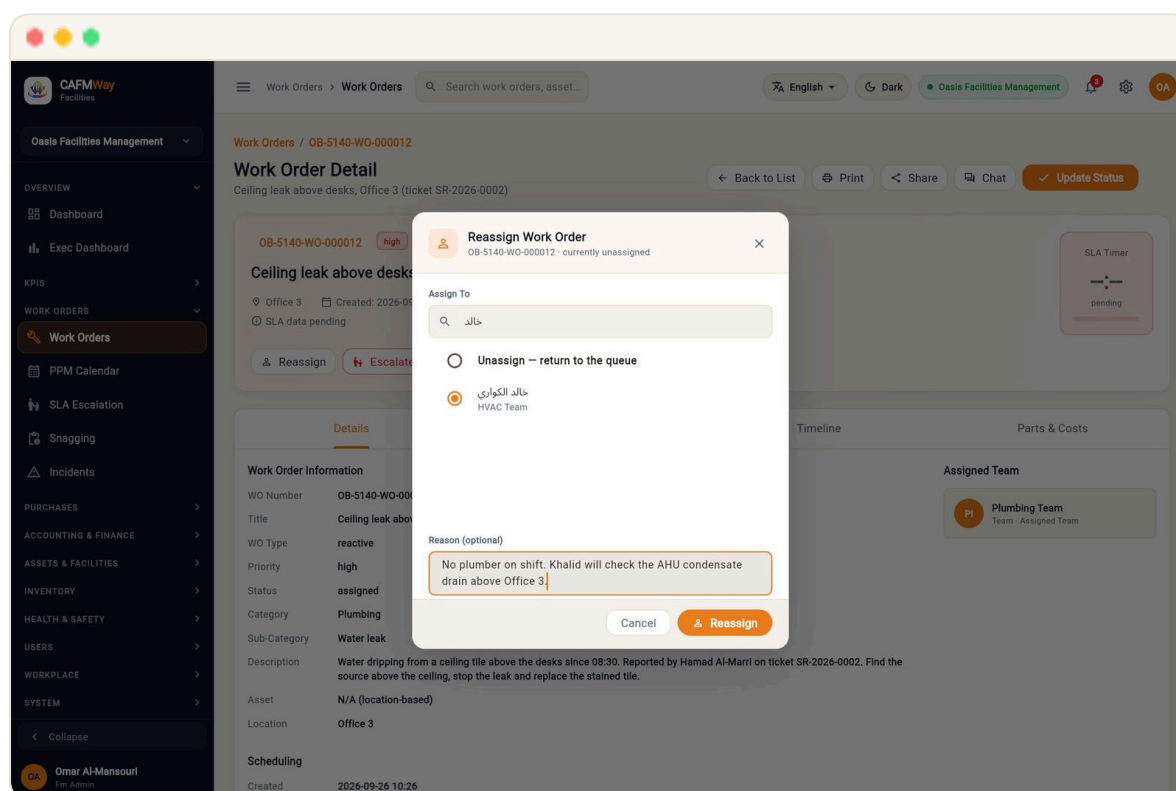


Figure 71 The Reassign Work Order dialog, moving the Office 3 leak to Khalid because no plumber is on shift.

- 3 **Accept and start.** Khalid accepts and starts the job in the Technician app; see the Technician app guide. The status becomes **Accepted**, then **In Progress**. If a technician cannot update the app, a supervisor can do it in the web app: click **Update Status**, choose **In Progress** in **New Status**, write a **Status Note** and click **Update Status**.

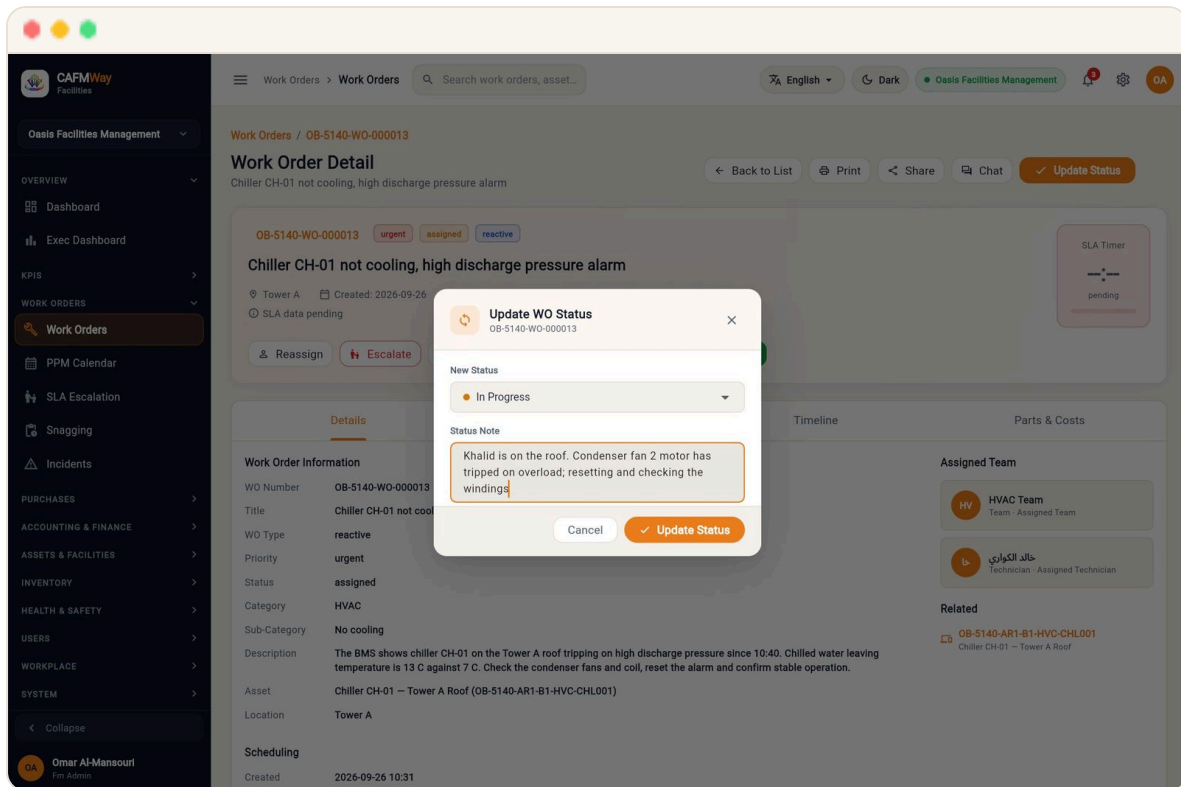


Figure 72 The Update WO Status dialog moving the chiller job to In Progress with a note from site.

4

Record progress. On the **Timeline** tab, click **Add Action** to add a note such as test results. Every status change, reassignment and note appears here with the person and time.

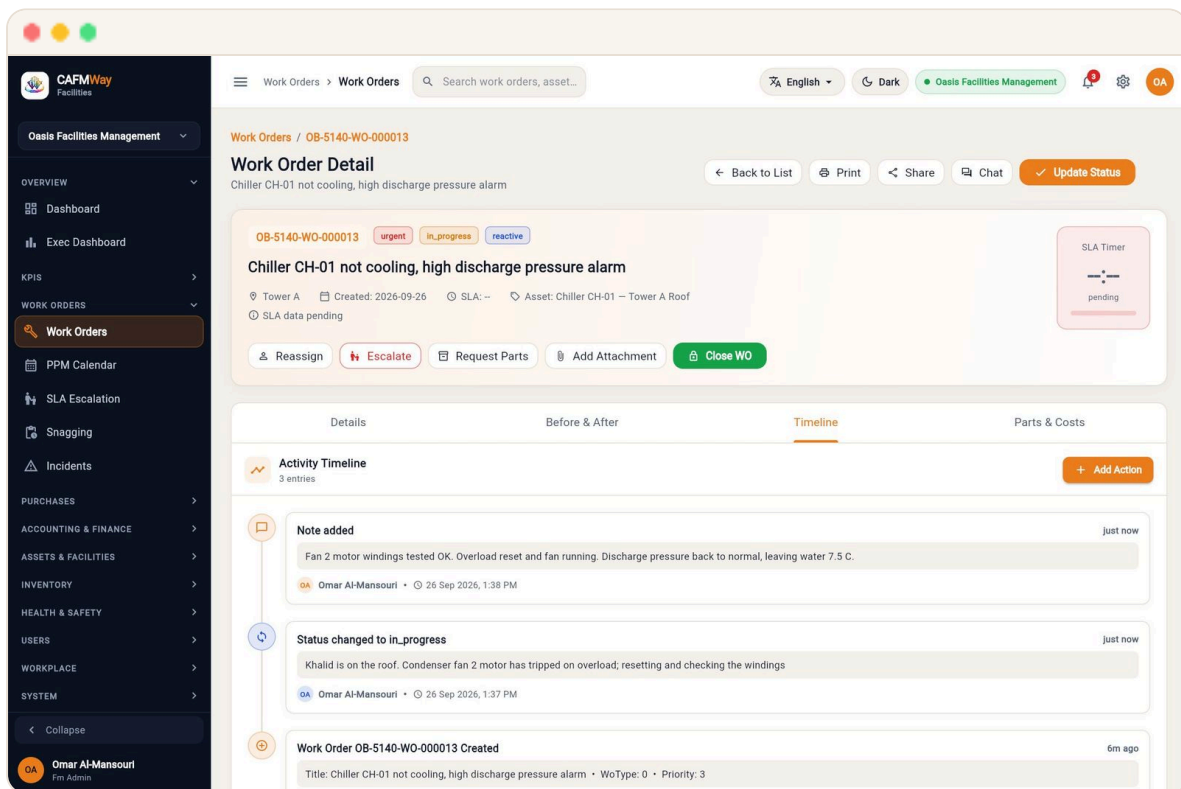


Figure 73 The chiller job's timeline with the creation, the status change and a progress note.

- 5 **Photos.** On the **Before & After** tab, add the before and after pictures with **Camera**. On a computer, **Camera** opens the file picker, so you can choose a saved photo. The technician usually takes them in the app.

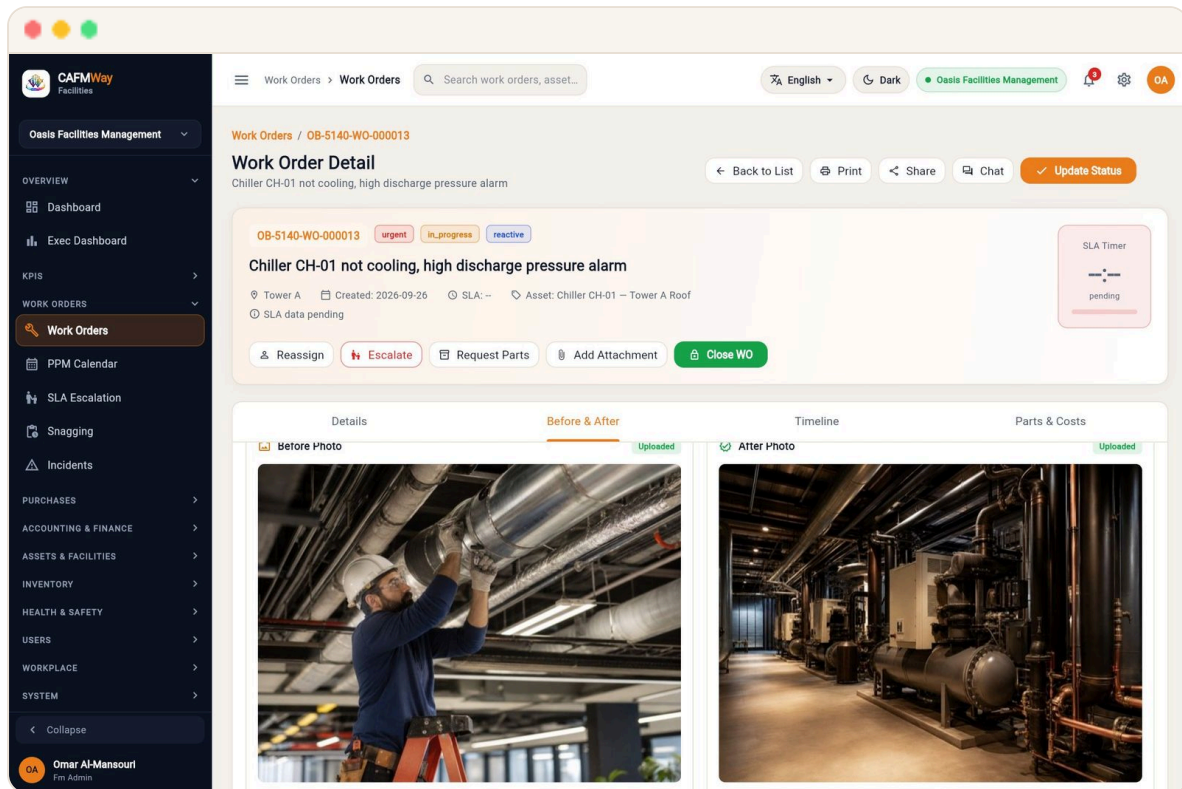


Figure 74 The Before & After tab with the before and after photos of the chiller job.

- 6 **Verification.** When the technician finishes, the job may come back as **Pending Verification**. The supervisor checks the work (here on the BMS) and closes it.
- 7 **Close.** Click **Close WO**. Describe the fix in **Resolution Notes**; **Close Time (Auto)** is set by the server. Click **Confirm & Close**. The message "Work order closed now. Actual time: ... (within SLA)" confirms the close and the status becomes **Completed**.

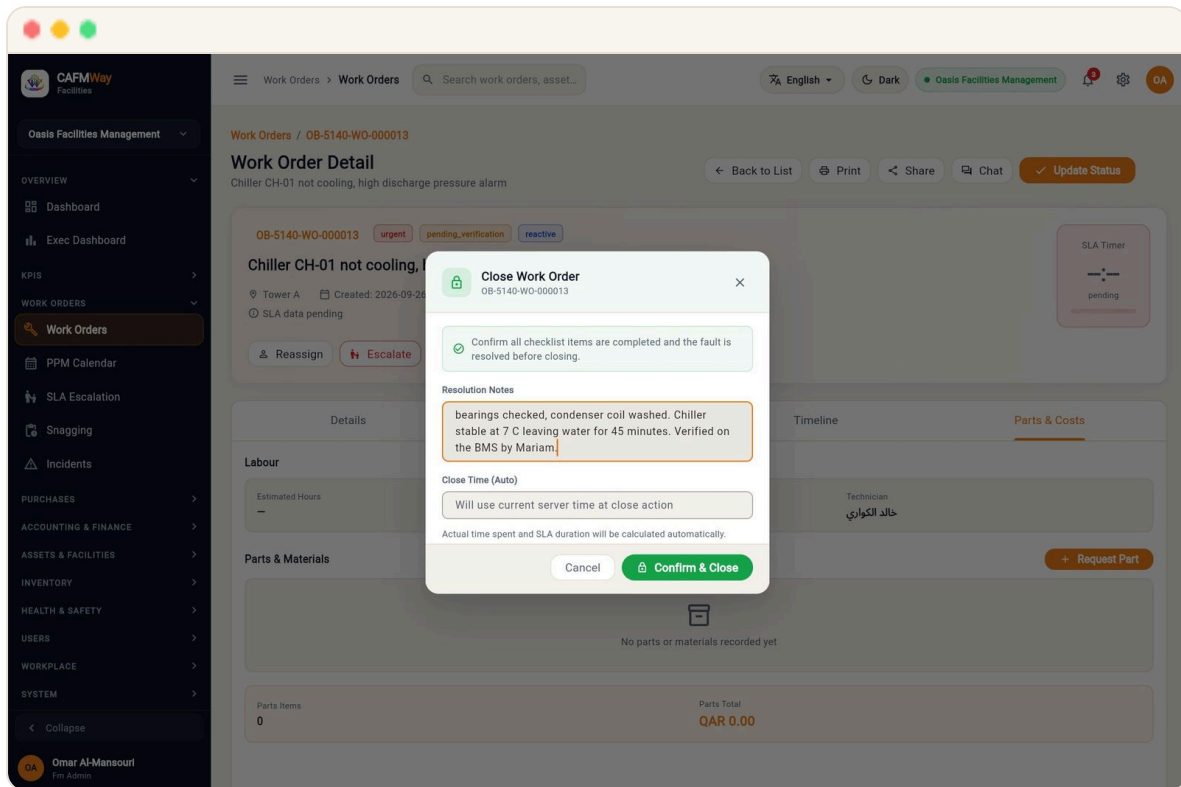


Figure 75 The Close Work Order dialog with the resolution notes for the chiller.

Closing a job stops the SLA clock and fixes the result, closes the technicians' time logs, notifies the requester and works out any contractor penalty.

CAUTION

Close WO clears the job's original description. Put anything from the description that must be kept into **Resolution Notes**.

NOTE

There is no **Verify** button in the web app. Close a job in **Pending Verification** with **Close WO**, or with **Update Status** → **Completed**.

TIP

Escalate (on the list and the detail page) adds an "Escalation" note with your reason to the timeline. It does not change the priority or notify anyone; the automatic SLA escalation does that (see "SLA targets, holds and breaches").

Contractor path: a lift breakdown

Who: Helpdesk Agent, Supervisor, FM Manager, FM Administrator; the contractor in the Technician app

Where: Work Orders → **New Work Order**

Lift Tech Qatar maintains the lifts under contract **C-2026-014** (Annual Lift Maintenance — Oasis Business Park). The contract covers the lift category (**Elevator**, code LIFT), promises a 1-hour response and a 4-hour fix for breakdowns, and charges QAR 500 for each breach. While the contract runs, lift work goes to Lift Tech, not to your own Elevators Team.

How the system decides who does the work

Each category and sub-category has a target: **Local Team**, **Contract** or **Both**. You set it under USERS → **Organisation & SLA** → **Classification**. A live contract that covers a category overrides the setting: the category shows **Contract** with the note "Set by contract C-2026-014 · Lift Tech Qatar · until 2027-09-30. Reverts to Local Team when the contract ends." When the contract ends, the category goes back to its own target without anyone editing it.

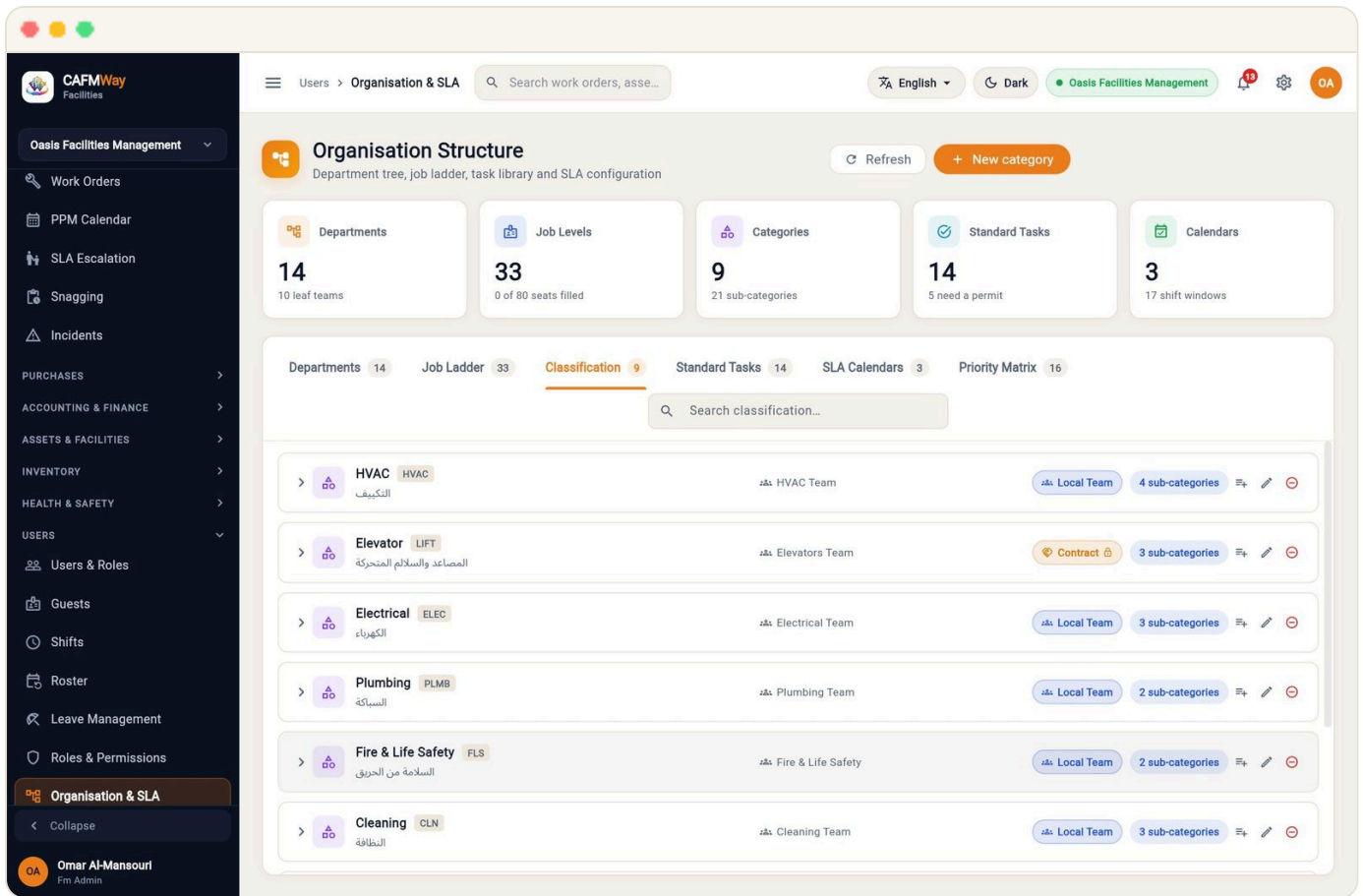


Figure 76 The Classification tab: HVAC and the other trades go to local teams, the lift category is set by contract C-2026-014.

Raise the lift work order

- 1 Click **New Work Order**, click **Scan / Lookup** and pick **Passenger Lift L-01 — Tower A**.
- 2 Write the title and description, for example
 Passenger Lift L-01 doors not closing, lift out of service . The lift is a critical asset, so the job is saved as **Urgent**. Click **Next Step**.
- 3 Choose the category **Elevator** and the sub-category **Elevator breakdown**. The chip next to **Assign To** reads **Contract**, and **Assign To** offers only the contractors that cover lifts: **Lift Tech Qatar**. Pick it.

Figure 77 Step 2 for the lift: the Contract chip, with Lift Tech Qatar as the only choice.

4

On **Step 3: Schedule & SLA**, the **SLA Profile** now shows the contract (**Annual Lift Maintenance — Oasis Business Park · C-2026-014**, 1h response, 4h resolution, 500 fixed) and the **SLA Timeline Preview** reads "From contract C-2026-014". **Estimated Duration** shows the contracted resolution time.

Figure 78 Step 3 with the lift contract's SLA: respond in 1 hour, resolve in 4 hours.

5

Click **Next Step**, check the review and click **Create Work Order**. The job, here OB-5140-WO-000020, is created for Lift Tech Qatar. Nobody at Oasis is assigned; the dispatch pool and Lift Tech's people are notified.

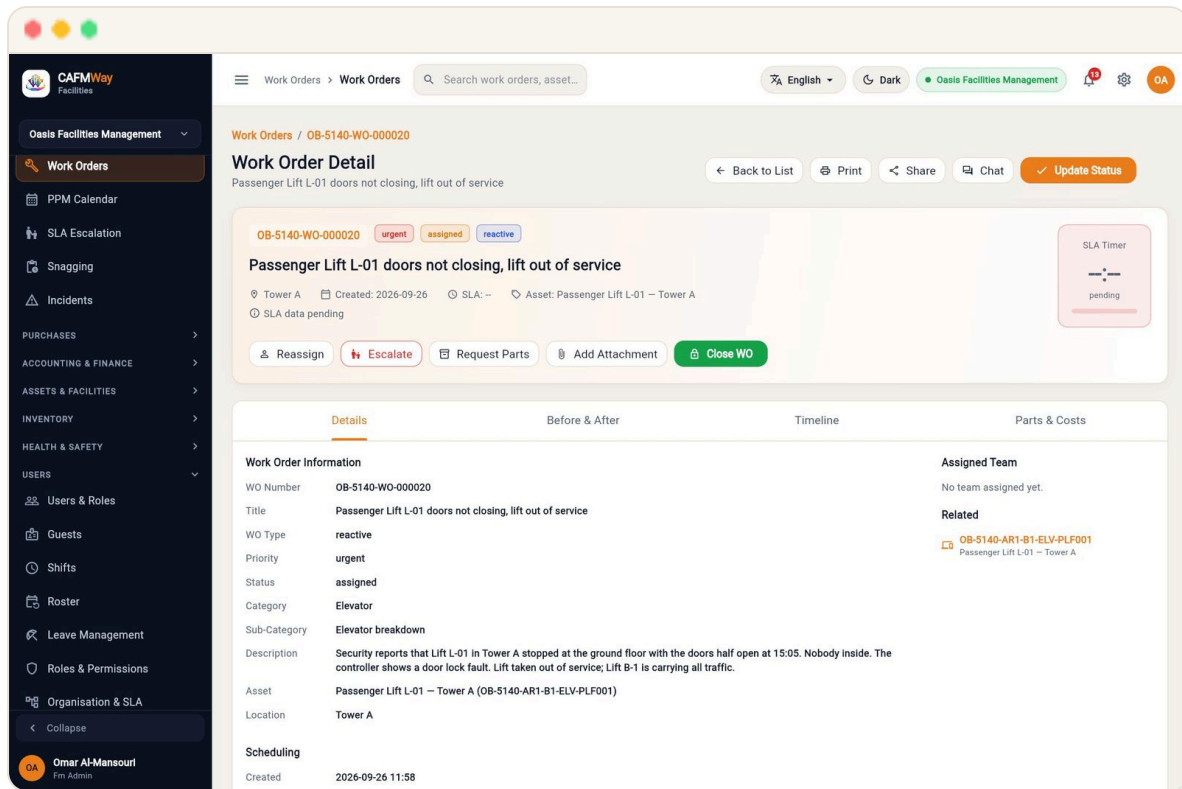


Figure 79 The lift work order after it was created for Lift Tech Qatar.

What the contractor does

Lift Tech's account manager, Rashid Al-Khater, sees the company's jobs in the Technician app and hands this one to his technician, Sami Nasser. Sami accepts, starts and finishes it there, with photos and the customer's sign-off; see the Technician app guide. You follow the job on the Work Orders list and on the **SLA Escalation** board. If Lift Tech is waiting for a part, put the job on hold with the reason **Waiting for spare parts** (see "SLA targets, holds and breaches").

When the job is completed, the system compares the response and completion times with the contract's SLA rule. A breach becomes a penalty against the contractor (here QAR 500 per breach). Penalties appear on the contractor's **Penalties** tab and in the **Contractor SLA Penalties** report.

Contractor SLA Penalties

EN AR Preview Print

From * 01 Sep 2026 To * 26 Sep 2026 Run

9 rows Generated 26 Sep 2026 11:42

Contractor	WO	Breach	Overdue (min)	Penalty
Al Noor HVAC Services	WO-CTR-0003	resolution	1,560	12,000.00
Al Noor HVAC Services	WO-CTR-0003	response	120	1,000.00
Al Noor HVAC Services	WO-CTR-0002	resolution	540	4,500.00
Gulf Climate Control	WO-CTR-0006	resolution	1,440	2,500.00
Gulf Climate Control	WO-CTR-0006	response	120	2,500.00
Gulf Climate Control	WO-CTR-0005	resolution	540	2,500.00
Rapid Fire Systems	WO-CTR-0009	resolution	1,560	15,000.00
Rapid Fire Systems	WO-CTR-0009	response	120	1,500.00
Rapid Fire Systems	WO-CTR-0008	resolution	540	6,750.00
TOTAL			727	48,250.00

Figure 80 The Contractor SLA Penalties report with the penalties charged in September.

NOTE

The job's detail page and the list do not show the contractor company yet: they read "No team assigned yet" and "Unassigned" until the contractor's manager hands the job to a technician. To give a job straight to a named contractor technician, use **Reassign** and search for the contractor's name, for example **Lift Tech**.

BUSINESS RULE

A contractor is offered only when the category's target is **Contract** or **Both** and the contractor's company is active and covers that category. A paused, expired or terminated contractor is never offered.

Cancel and reopen a work order

Who: Supervisor, FM Manager, FM Administrator

Where: Work Orders → open a job → **Update Status**

Cancel

- 1 Open the job and click **Update Status**.
- 2 In **New Status**, choose **Cancelled**. Write why in **Status Note**.
- 3 Click **Update Status**. The job becomes **Cancelled**, any stock reserved for it goes back to the store, and the technician's app shows the change.

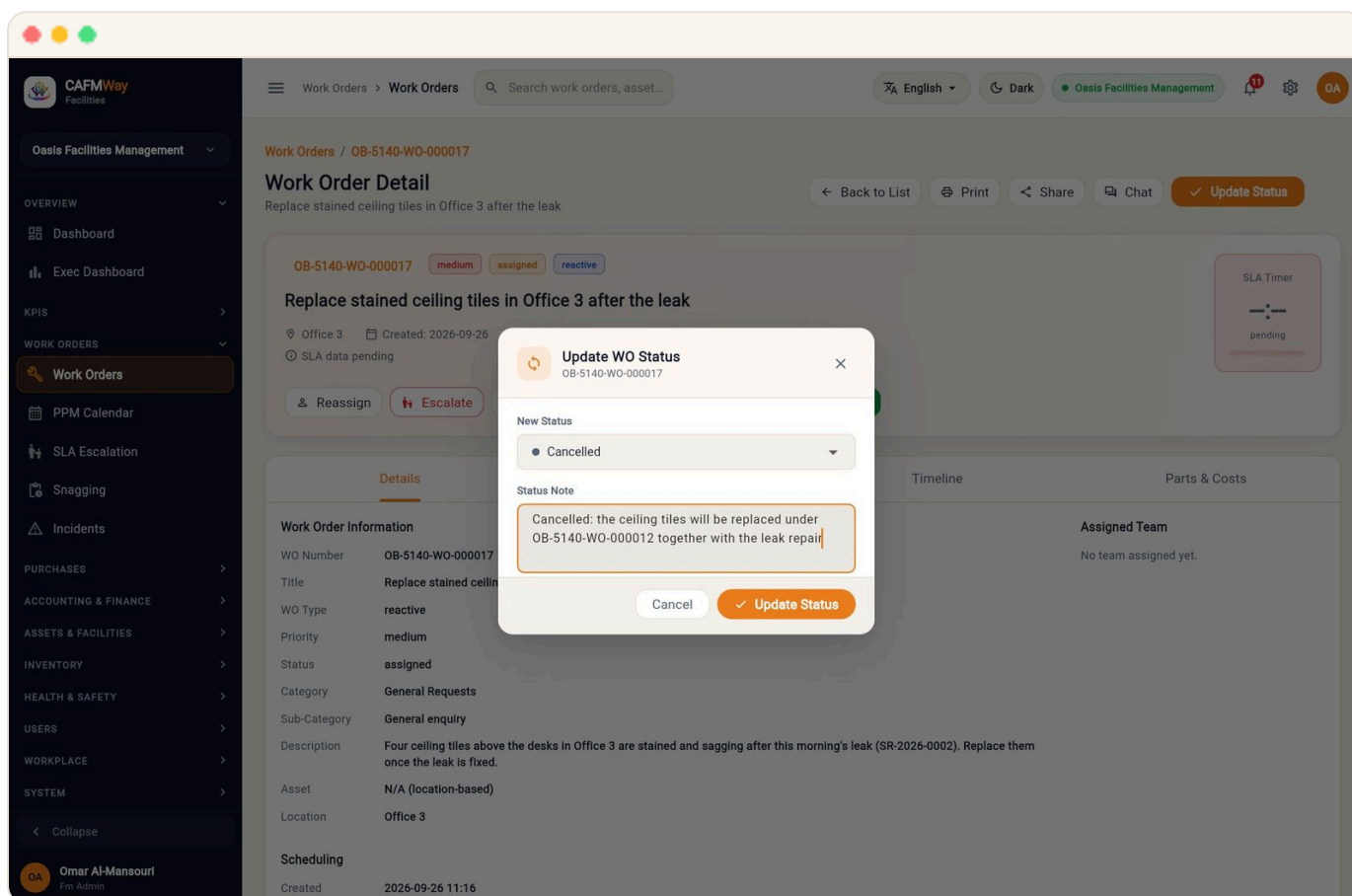


Figure 81 Cancelling the ceiling-tile job because the work will be done under another work order.

Reopen

- 1 Open the cancelled, rejected or completed job and click **Update Status**.
- 2 Choose the status the job should go back to, usually **Accepted** (the technician must restart it) or **In Progress**.

3 Write why in **Status Note** and click **Update Status**.

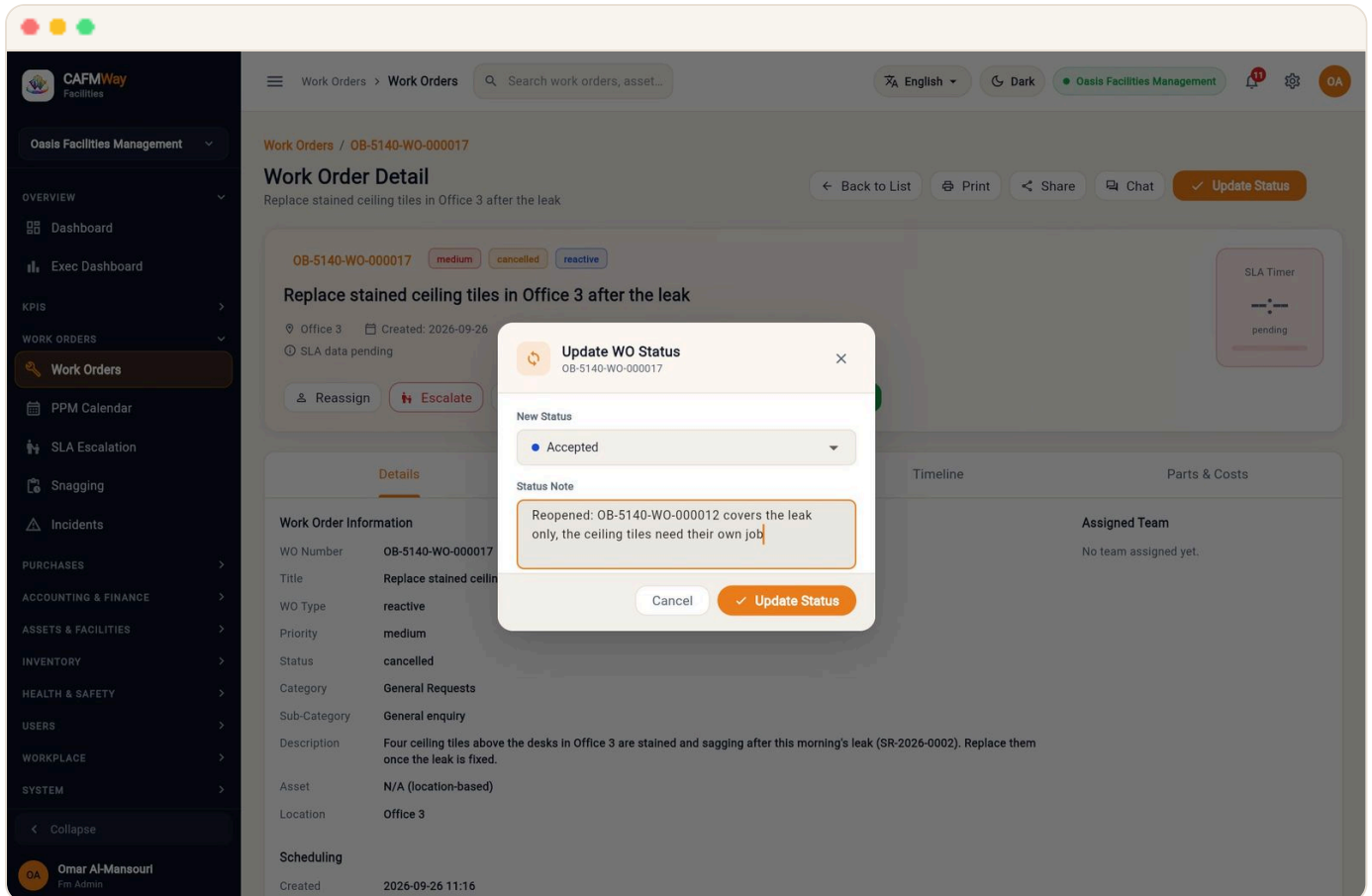


Figure 82 Reopening the ceiling-tile job as Accepted.

The screenshot displays the CAFMWay interface for a specific work order. The left sidebar contains navigation menus for Overview, KPIS, Work Orders, Purchases, Accounting & Finance, Assets & Facilities, Inventory, Health & Safety, Users, Workplace, and System. The main content area shows the 'Work Order Detail' for 'OB-5140-WO-000017'. The title is 'Replace stained ceiling tiles in Office 3 after the leak'. The status is 'accepted'. The timeline shows three entries: 'Status changed to accepted' (just now), 'Status changed to cancelled' (just now), and 'Work Order OB-5140-WO-000017 Created' (8m ago). The 'cancelled' entry has a note: 'Cancelled: the ceiling tiles will be replaced under OB-5140-WO-000012 together with the leak repair'. The 'accepted' entry has a note: 'Reopened: OB-5140-WO-000012 covers the leak only, the ceiling tiles need their own job'.

Figure 83 The timeline shows the cancellation and the reopening with their notes.

BUSINESS RULE

Reopening a completed job does not undo its completion time or its SLA result. If the fault came back, raise a new work order instead, so the first repair keeps its record. **Reassign** refuses completed and cancelled jobs; reopen them first.

The work order detail page

Who: anyone who can read work orders

Where: Work Orders → **View** (eye icon)

The screenshot displays the 'Work Order Detail' page in the CAFMWay web application. The left sidebar contains a navigation menu with categories like Overview, KPIS, Work Orders, Purchases, Accounting & Finance, Assets & Facilities, Inventory, Health & Safety, Users, Workplace, and System. The 'Work Orders' section is expanded, showing 'Work Orders' as the selected item. The main content area shows the details for work order 'OB-5140-WO-000013', titled 'Chiller CH-01 not cooling, high discharge pressure alarm'. The header of the detail page includes the work order number, status (urgent, assigned, reactive), location (Tower A), creation date (2026-09-26), SLA, and asset (Chiller CH-01 - Tower A Roof). Below the header, there are action buttons: Reassign, Escalate, Request Parts, Add Attachment, and Close WO. A 'Back to List' button is also present. The 'Details' tab is active, showing a table of work order information. The 'Assigned Team' section lists the HVAC Team and a technician, خالد الكواري. The 'Related' section shows a related work order, OB-5140-AR1-B1-HVC-CHL001.

Work Order Detail
Chiller CH-01 not cooling, high discharge pressure alarm

OB-5140-WO-000013 **urgent** **assigned** **reactive**

Chiller CH-01 not cooling, high discharge pressure alarm

Tower A Created: 2026-09-26 SLA: -- Asset: Chiller CH-01 - Tower A Roof
SLA data pending

Reassign Escalate Request Parts Add Attachment Close WO

Details Before & After Timeline Parts & Costs

Work Order Information

WO Number	OB-5140-WO-000013
Title	Chiller CH-01 not cooling, high discharge pressure alarm
WO Type	reactive
Priority	urgent
Status	assigned
Category	HVAC
Sub-Category	No cooling
Description	The BMS shows chiller CH-01 on the Tower A roof tripping on high discharge pressure since 10:40. Chilled water leaving temperature is 13 C against 7 C. Check the condenser fans and coil, reset the alarm and confirm stable operation.
Asset	Chiller CH-01 - Tower A Roof (OB-5140-AR1-B1-HVC-CHL001)
Location	Tower A

Scheduling

Created	2026-09-26 10:31
---------	------------------

Assigned Team

- HVAC Team
Team - Assigned Team
- خالد الكواري
Technician - Assigned Technician

Related

- OB-5140-AR1-B1-HVC-CHL001
Chiller CH-01 - Tower A Roof

Figure 84 The detail page of the chiller job, with the action buttons and the Details tab.

The header shows the number, status, priority and type, the location, the creation date and the asset. The buttons along the top are:

Button	What it does
Back to List	Returns to the list.
Print	Prints the Work Order Completion Certificate (see "Print and report work orders").
Share	Gives another user read, write, submit or share rights on this one job.
Chat	Opens a conversation about the job with the assigned technician.
Update Status	Moves the job to any status, with a note.
Reassign	Hands the job to another person or back to the queue.
Escalate	Adds an escalation note to the timeline.
Add Attachment	Opens the Before & After tab.
Close WO	Completes the job with resolution notes.

The tabs:

- **Details** — the work order information, the scheduling dates (**Created**, **Scheduled**, **SLA Deadline**, estimated and actual hours), the assigned team and technician, the linked ticket and asset, and **Additional fields** if your company added custom fields for work orders.
- **Before & After** — the before and after photos and the customer's sign-off, which the technician collects in the app.
- **Timeline** — every event on the job; **Add Action** adds a note.
- **Parts & Costs** — labour hours and the parts issued to the job, with their unit cost and total. Parts are requested by the technician in the Technician app and approved and issued under INVENTORY → **Material Requests**.

The screenshot displays the 'Work Order Detail' page for 'OB-5140-WO-000005'. The title is 'Replace fan coil filters, Tower A floor 2 reception'. The status is 'low', 'completed', and 'reactive'. The SLA Timer is 'pending'. The 'Parts & Costs' tab is active, showing a table of parts and a total cost of QAR 168.00.

PART NAME	QTY	UNIT COST	TOTAL
Panel filter G4 595x595x48 mm (FLT-G4-595)	4	QAR 42.00	QAR 168.00

Parts Items: 1, Parts Total: QAR 168.00

Figure 85 The Parts & Costs tab of a job that used four panel filters.

NOTE

The **SLA Timer** box in the header and the "SLA data pending" line are not filled in yet. Read the target on the **Details** tab (**SLA Deadline**) or on the SLA Escalation board. **Request Parts** and **Request Part** on this page do not create a request yet.

Print and report work orders

Who: anyone who can read work orders; reports need the Report permission

Where: work order detail → **Print**; Sidebar → **Reports**

Completion certificate

On the detail page, click **Print**. The app builds the **Work Order Completion Certificate** on your company letterhead and opens the browser's print dialog, where you can print it or save it as PDF. The certificate lists the job details, the asset, the work performed, the observations, every step of the workflow with who did it and when, and the photographs.

Oasis Facilities Management
WORK ORDER COMPLETION CERTIFICATE
Work order: 159ccf10-bdf9-4aa1-aca4-7892d959c5f3

WORK ORDER COMPLETION CERTIFICATE
OB-5140-WO-000013 · 26 Sep 2026
Oasis Facilities Management

DETAILS

Work order	OB-5140-WO-000013	Raised	26 Sep 2026 13:31
Description	Chiller CH-01 not cooling, high discharge pressure alarm	Completed	26 Sep 2026 13:46
Priority	urgent	Location	Tower A
Status	completed	Requested by	Omar Al-Mansouri

ASSET

Asset code	OB-5140-AR1-B1-HVC-CHL001	Model	Carrier 30XA-402
Asset	Chiller CH-01 — Tower A Roof	Category	HVAC

WORK PERFORMED

Condenser fan 2 motor overload reset, windings and bearings checked, condenser coil washed. Chiller stable at 7 C leaving water for 45 minutes. Verified on the BMS by Mariam.

OBSERVATIONS

Condenser fan 2 motor overload reset, windings and bearings checked, condenser coil washed. Chiller stable at 7 C leaving water for 45 minutes. Verified on the BMS by Mariam.

WORKFLOW

When	Event	By
26 Sep 2026 13:31	Work Order OB-5140-WO-000013 Created	Omar Al-Mansouri
26 Sep 2026 13:37	Status changed to in_progress	Omar Al-Mansouri
26 Sep 2026 13:38	Note added	Omar Al-Mansouri
26 Sep 2026 13:44	Work Order OB-5140-WO-000013 photos updated	Omar Al-Mansouri
26 Sep 2026 13:44	Work Order OB-5140-WO-000013 photos updated	Omar Al-Mansouri
26 Sep 2026 13:46	Status changed to pending_verification	Omar Al-Mansouri
26 Sep 2026 13:46	Work Order OB-5140-WO-000013 completed	Omar Al-Mansouri

PHOTOGRAPHS

Oasis Facilities Management · CR 184522
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Powered by CAFM Way

Generated 26 Sep 2026 10:48
by Omar Al-Mansouri
Page 1 of 2

Figure 86 The completion certificate of OB-5140-WO-000013 with the work performed and the workflow.

NOTE

Print on the detail page always produces the English certificate. For the Arabic layout, open **Work Order Completion Certificate** in the Report Centre, choose the job in **Work order ***, click **Run**, choose **AR** and click **Print**.

Work order reports

Open **Reports** and type **work order** in **Search reports....** The work order reports are:

CAFM Way User Guide — CAFM Way Web App

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Report	What it shows
Monthly Performance Summary	Volume, SLA, PPM compliance and the busiest assets for management.
Work Order Completion Certificate	The record of one completed job.
Work Order Status Register	Every work order in the period with status, priority and location.
Work Order SLA Compliance	Response performance against the SLA target, by building.
Work Order Priority Analysis	Volume and average age by priority, category and sub-category.
Work Order Assignment & Workload	Who is carrying what and how much is still open.
Backlog Ageing	Open work orders by age band.
Escalated Work Orders	Open work orders past their resolution target.
Pending Verification	Work reported complete and not yet verified.
Contractor Work Register	Work orders issued to each contractor.
Contractor SLA Penalties	Breaches charged against contractors, by contract.

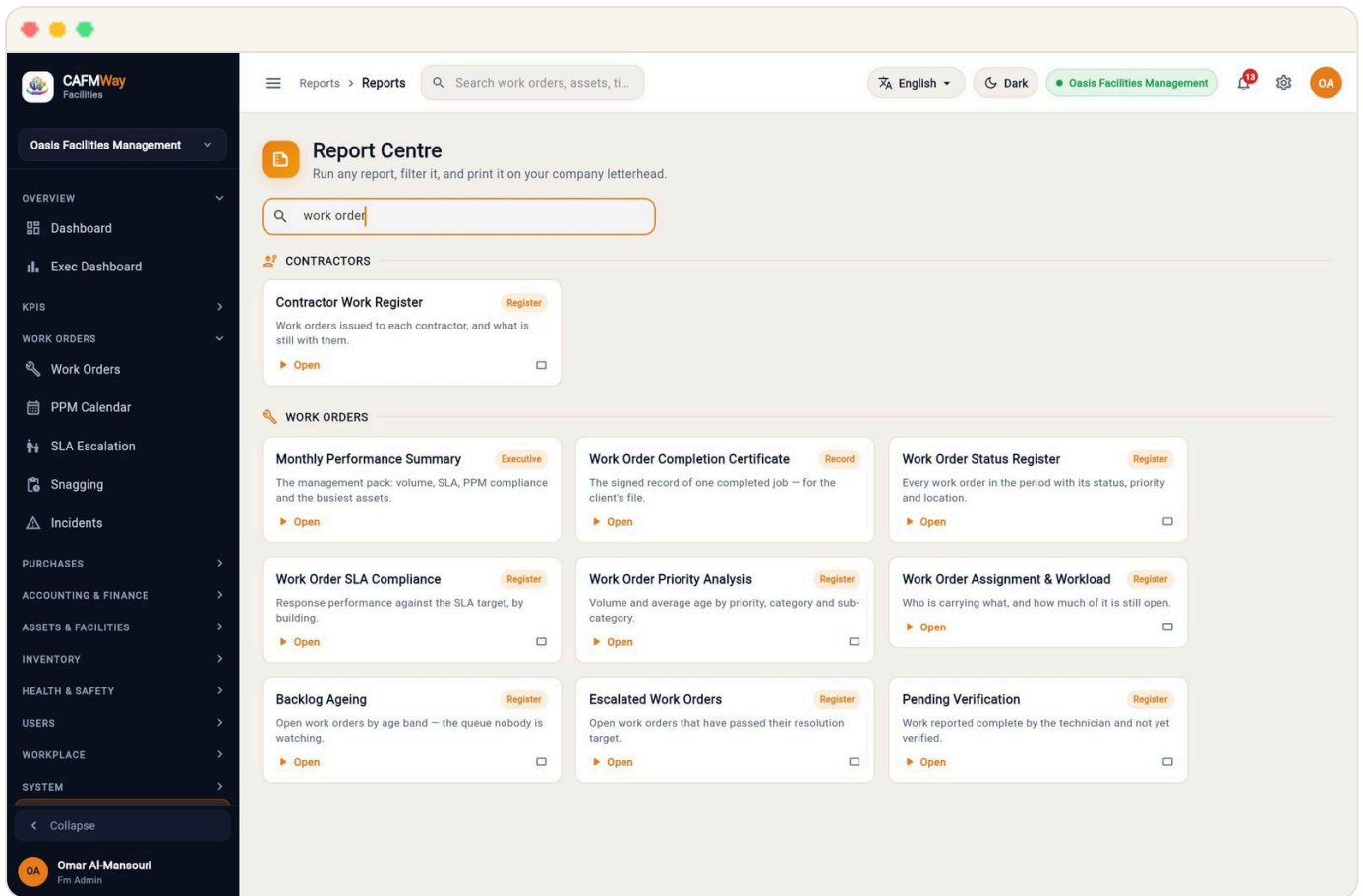


Figure 87 The work order reports in the Report Centre.

- 1 Click **Open** on a report.
- 2 Set the filters, for example **From ***, **To *** and **Status**, and click **Run**.
- 3 Switch the report language with **EN / AR**, check it with **Preview**, and click **Print** to print or save it as PDF.

Work Order Status Register

ENARPreviewPrint

From *
01 Sep 2026

To *
26 Sep 2026

Status
All

Run

32 rows11 groups

Generated 26 Sep 2026 11:37

WO	Description	Priority	Location	Raised	Status
OB-5140-WO-000010	Coffee spill on corridor carpet, Tower B Floor 1	low	Floor 1	26 Sep 2026	Cancelled
OB-5140-WO-000016	تسرب مياه من مغسلة دورة المياه في الطابق الثاني	medium	Floor 2	26 Sep 2026	Assigned
WO-CTR-0003	HVAC – callback, fault recurred	high	Floor 2	25 Sep 2026	In progress
WO-CTR-0008	Fire Safety – unit fault reported	high	Office 2	23 Sep 2026	Completed
OB-5140-WO-000018	Fit an anti-slip mat and a drip tray below the Office 3 AHU drain	medium	Office 3	26 Sep 2026	Assigned
OB-5140-WO-000017	Replace stained ceiling tiles in Office 3 after the leak	medium	Office 3	26 Sep 2026	accepted
OB-5140-WO-000012	Ceiling leak above desks, Office 3 (ticket SR-2026-0002)	high	Office 3	26 Sep 2026	Completed
WO-CTR-0002	HVAC – unit fault reported	high	Office 3	23 Sep 2026	Completed
OB-5140-WO-000006	Water dripping from ceiling tile in Office 4	high	Office 4	26 Sep 2026	Assigned
WO-CTR-0006	HVAC – callback, fault recurred	high	Office 6	25 Sep 2026	In progress
WO-CTR-0009	Fire Safety – callback, fault recurred	high	Office 6	25 Sep 2026	In progress
WO-CTR-0004	HVAC – planned service visit	high	Office 6	22 Sep 2026	Completed
OB-5140-WO-000004	Office 7 fan coil unit dripping water onto the carpet	high	Office 7	26 Sep 2026	pending_verification
WO-CTR-0001	HVAC – planned service visit	high	Office 7	22 Sep 2026	Completed
WO-CTR-0007	Fire Safety – planned service visit	high	Office 7	22 Sep 2026	Completed

Figure 88 The Work Order Status Register for September 2026.

TIP

Export on the Work Orders list opens the Work Order Status Register directly.

SLA targets, holds and breaches

Who: Supervisor, FM Manager, FM Administrator
Where: Sidebar → WORK ORDERS → **SLA Escalation**

Every work order gets two targets when it is created: a time to respond (the technician starts work) and a time to resolve (the job is completed). The clock runs around the clock from the moment the job is raised. It stops when the job is completed, cancelled or rejected, and pauses while the job is on hold.

Choosing the priority: the priority matrix

The company's rule for choosing a priority is kept under **USERS → Organisation & SLA → Priority Matrix**. **Priority = impact × urgency**: impact is how much of the site is affected (1 is the most), urgency is how fast the problem gets worse (1 is the fastest). The cell where they meet gives the priority: P1 Critical, P2 High, P3 Medium, P4 Low. Click a cell to change it. The same tab lists the **SLA pause reasons**.

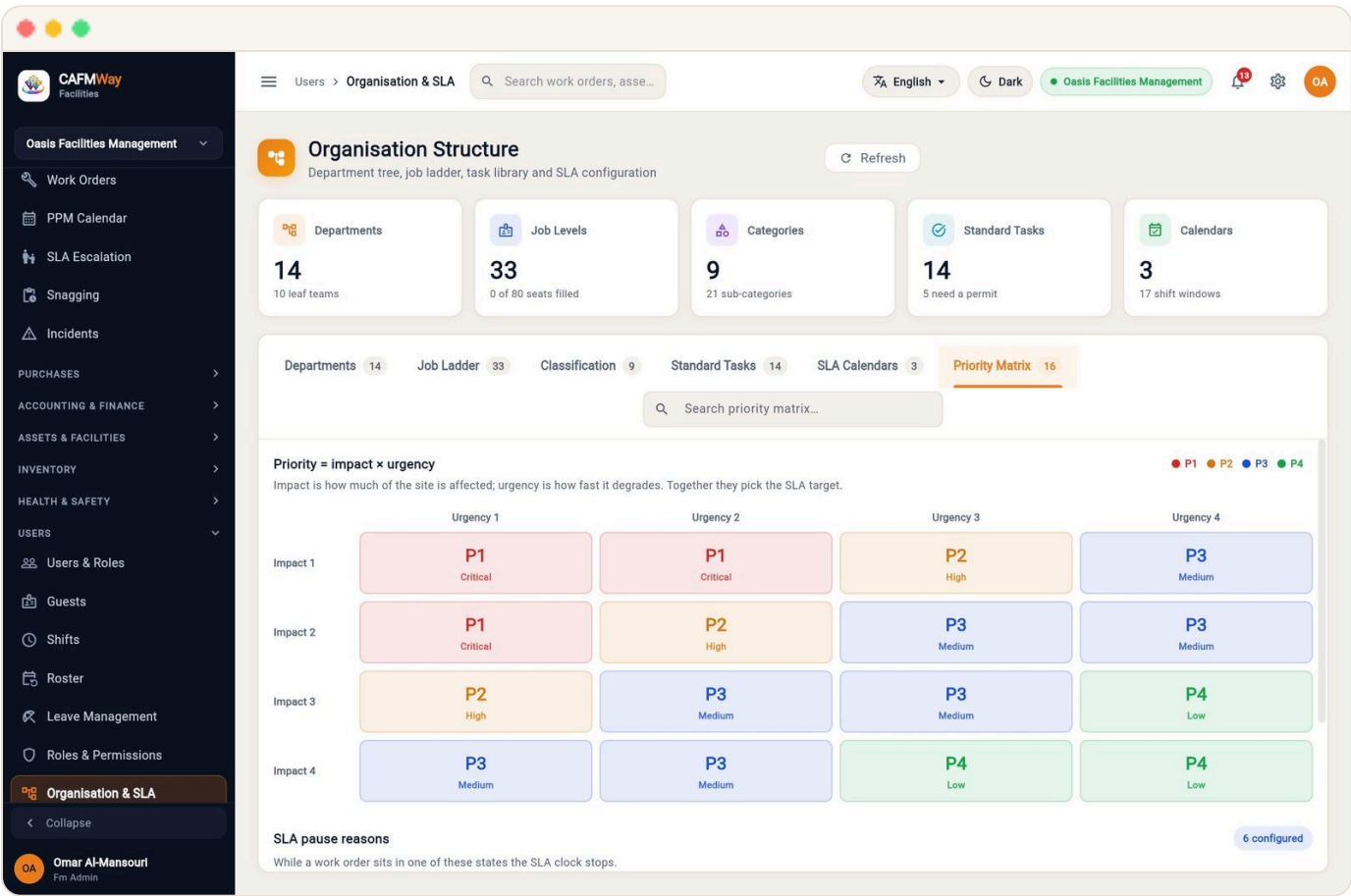


Figure 89 The priority matrix: impact 1 with urgency 1 or 2 gives P1 Critical, impact 4 with urgency 3 or 4 gives P4 Low.

NOTE

The web ticket and work order forms ask for the priority directly; they do not calculate it from the matrix. Use the matrix to decide which priority to pick. P1 Critical is the priority shown as **Urgent** on the work order list.

Targets by priority

Open the **Targets & escalation** tab. **THE PROMISE, BY PRIORITY** lists the targets:

Priority	Respond within	Resolve within	Warn at	Escalate to
Urgent (Critical on the wizard)	1 h	4 h	80%	Supervisor
High	2 h	8 h	80%	Supervisor
Medium	4 h	24 h	80%	Supervisor
Low	8 h	48 h	80%	Supervisor

To change a priority's targets, click **Edit**, change **Respond within (hours)**, **Resolve within (hours)**, **Warn at (% elapsed)** and **Escalate to (Supervisor, FM Manager or FM Admin)**, and click **Save**.

The screenshot displays the CAFMWay Work Order SLA & Escalation interface. The 'Targets & escalation' tab is active, showing a modal window for editing the 'URGENT' target. The modal contains the following fields:

- Respond within (hours):** 1
- Resolve within (hours):** 4
- Warn at (% elapsed):** 80
- Escalate to:** Supervisor

The background interface shows a dashboard with various metrics and a table of compliance data. The table includes columns for priority, compliance percentage, and a list of breaches.

Figure 90 Editing the Urgent targets: respond in 1 hour, resolve in 4 hours, warn at 80%.

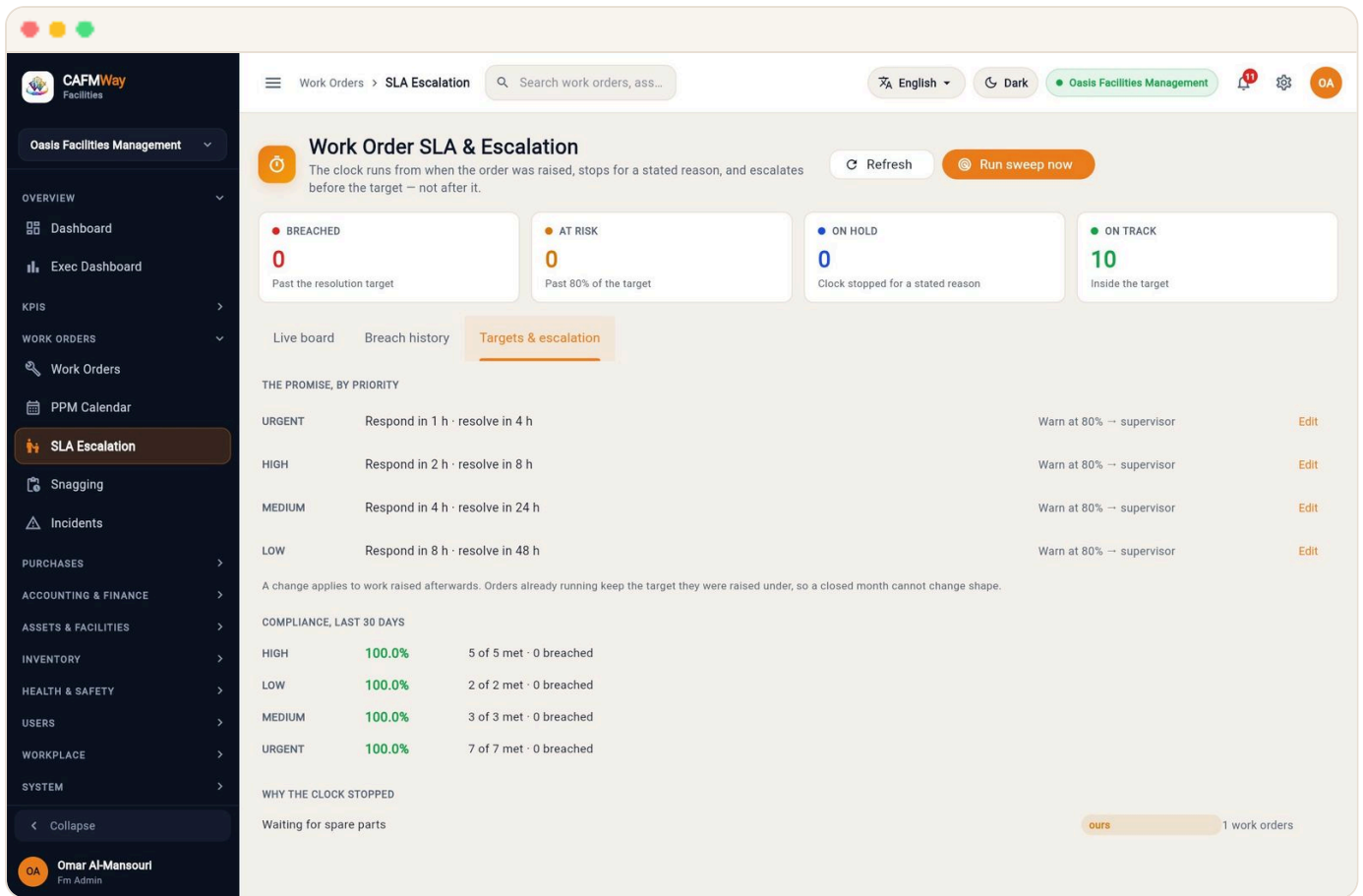


Figure 91 The Targets & escalation tab with compliance for the last 30 days and the reasons the clock stopped.

BUSINESS RULE

A change applies to work raised afterwards. Jobs already running keep the targets they were raised under. A contractor's own SLA (for example the 4-hour fix in the lift contract) is used for its penalties.

Live board

The **Live board** tab lists open jobs with the time left, most urgent first. The tiles count **BREACHED** (past the resolution target), **AT RISK** (past the warning percentage), **ON HOLD** and **ON TRACK**.

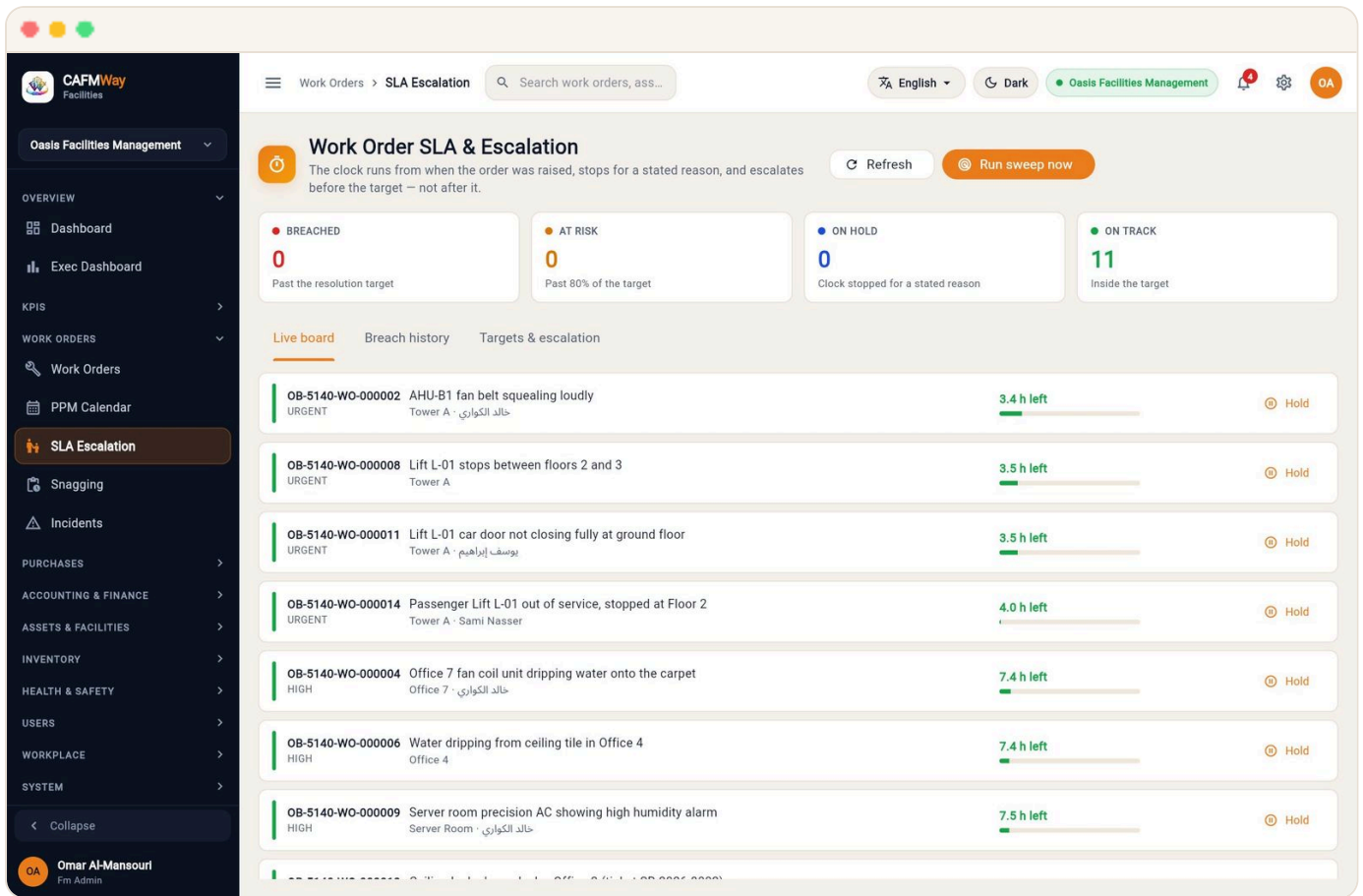


Figure 92 The live board with the time left on each open job.

Put a job on hold

When a job cannot move for a reason outside the technician's control, stop its clock:

- 1 On the **Live board**, click **Hold** on the job.
- 2 In **Stop the clock on ...?**, choose the **Reason**. Each reason says who carries the delay: **ours** (the service provider), **client** or **force majeure**. The reasons are **Safety hold**, **Waiting for quotation approval**, **Waiting for client access**, **Waiting for spare parts**, **Waiting for permit issue** and **Adverse weather stand-down**.
- 3 Add a **Note (optional)** and click **Hold**.

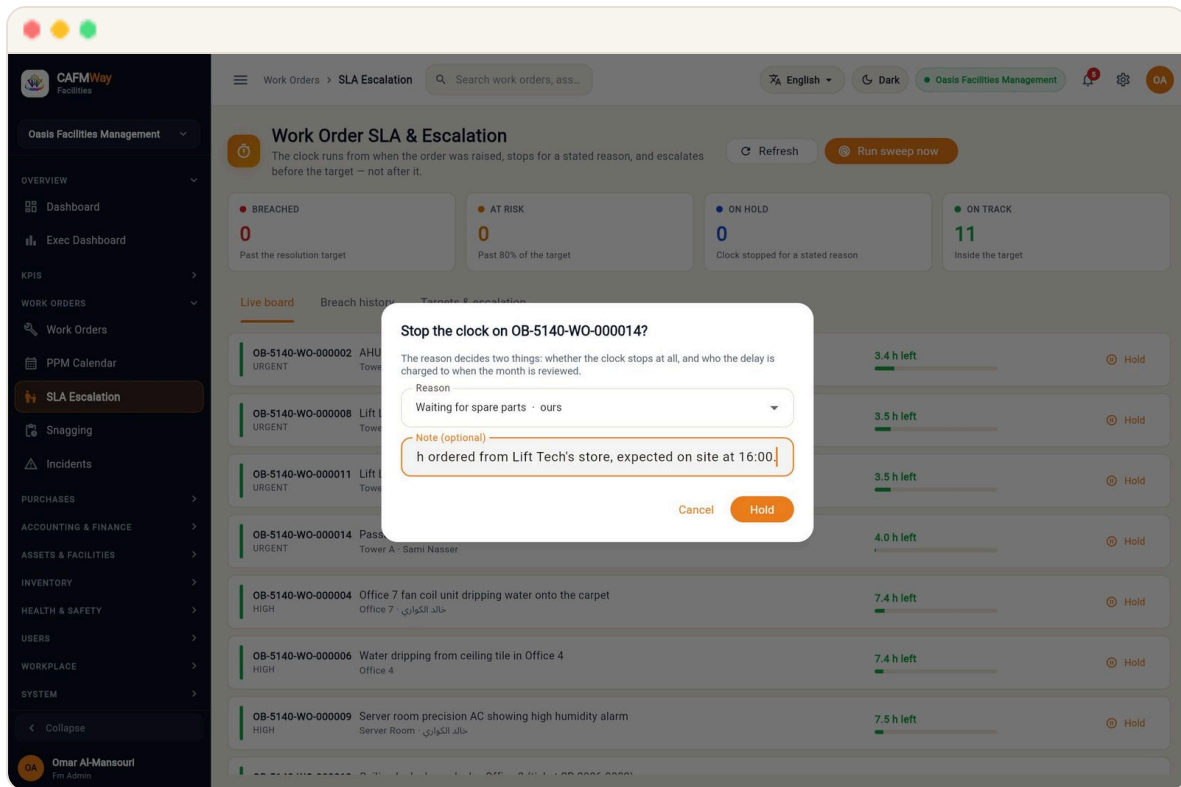


Figure 93 Holding the lift job while the door lock switch is on its way.

4

The job shows **On hold** with the reason, and the **ON HOLD** tile goes up.

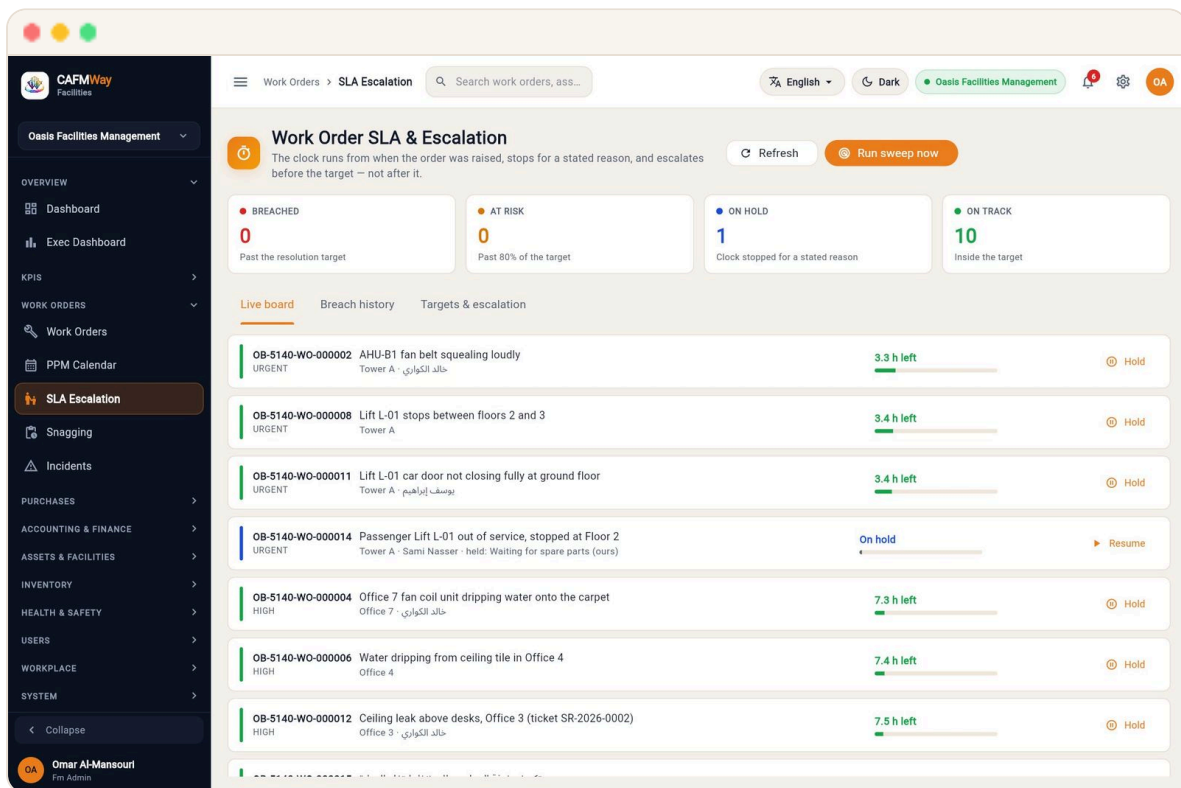


Figure 94 The live board with the lift job on hold for spare parts.

5

When work can continue, click **Resume**. The targets move out by the time the job was on hold ("Clock restarted. Targets moved out by ...").

WHY THE CLOCK STOPPED on the **Targets & escalation** tab sums the holds by reason for the month.

NOTE

Holds are placed from this board only; the mobile apps have no hold button. A hold does not change the job's status.

Breaches and escalation

The system checks all open jobs every 15 minutes (**Run sweep now** checks at once):

Level	When	Who is told
At risk	The warning percentage of the resolution time has passed	The technician and the supervisor
L1	A target has passed (response or resolution)	The technician, the supervisor and the escalation role
L2	Still open after a further step (half the resolution time, at least one hour)	The FM Manager
L3	Still open after another step	The FM Administrator

Each breach is kept on the **Breach history** tab with its type (response or resolution), how late it is and its level. When a job passes its resolution target, the **Live board** shows it as breached with a **Take it** button: click it to acknowledge the breach, and the escalation stops climbing. Notifications appear in the bell menu.

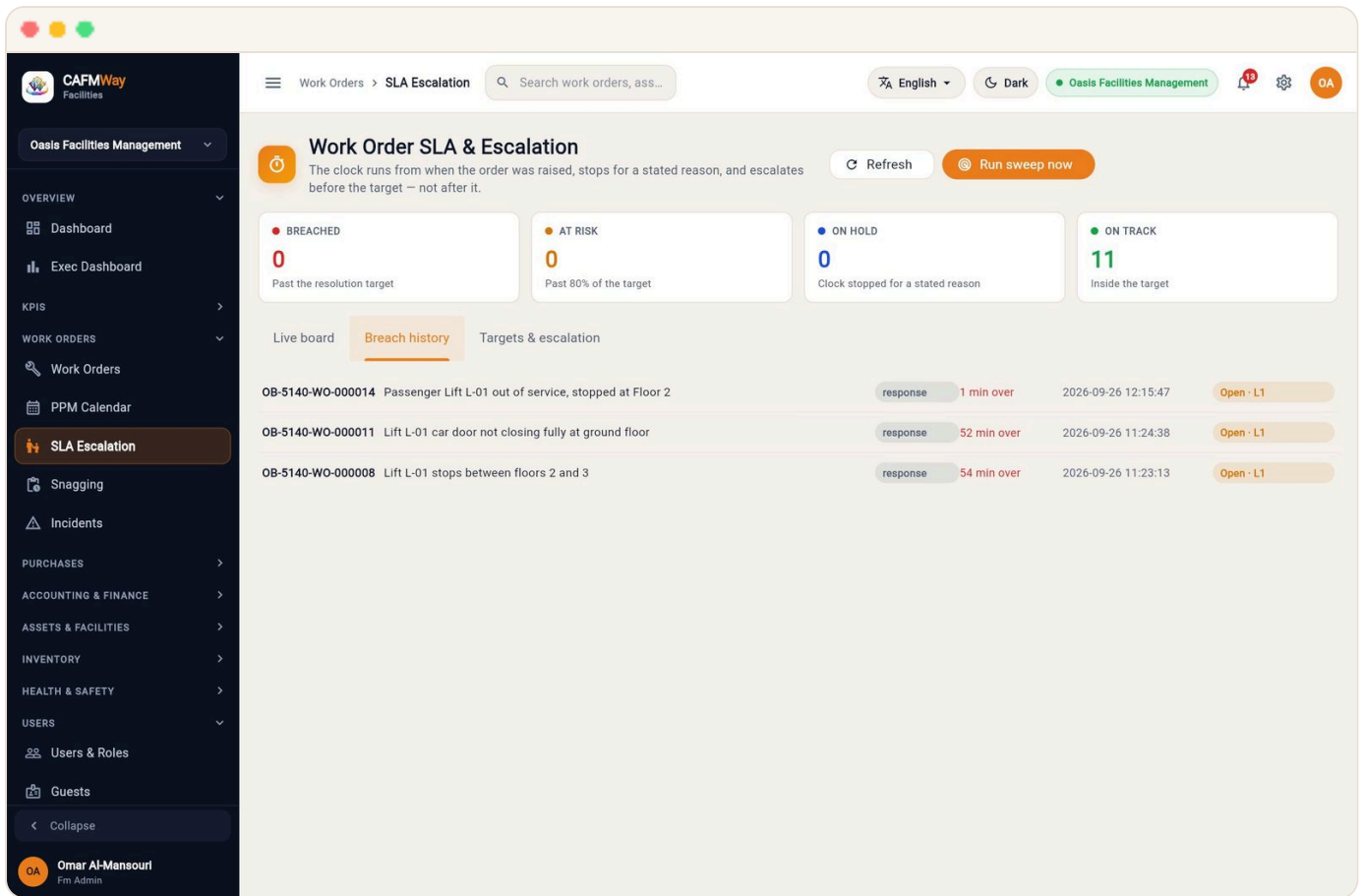


Figure 95 The breach history with three lift jobs that missed their 1-hour response target.

NOTE

A breach found more than 48 hours late is recorded but not announced, so an old backlog does not flood the notifications. The **Escalated Work Orders** and **Work Order SLA Compliance** reports show breaches over a period.

Planned preventive maintenance

Who: FM Manager, FM Administrator, Supervisor

Where: Sidebar → WORK ORDERS → **PPM Calendar**; Dashboard → **Quick Actions** → **Schedule PPM**

A PPM plan repeats a service on a set of assets or locations. Creating the plan generates the first work orders at once; the system then adds each new occurrence when its date comes.

Create a plan

The example services Chiller CH-01 every quarter.

- 1 On **PPM Calendar**, click **Schedule PPM**. The **Schedule PPM** dialog opens.
- 2 Type the **PLAN NAME**, for example `Chiller CH-01 quarterly service`.
- 3 Choose the **CATEGORY** and **SUB-CATEGORY**, for example **HVAC** and **Chiller planned service**. Technicians and contractors qualified for this classification see the plan.
- 4 In **REPEATS**, choose **Daily, Weekly, Monthly, Quarterly, Every 6 months, Yearly**, or **Every N days** (then type the number of days).
- 5 Set **FIRST DUE, GENERATE AHEAD** (how many occurrences to create now, 1 to 60) and **DURATION (MIN)**.
- 6 Under **TARGETS**, type part of a code or name in the filter and tick the assets or locations. The orange box shows how many work orders will be generated and on which dates.
- 7 Click **Create & generate**.

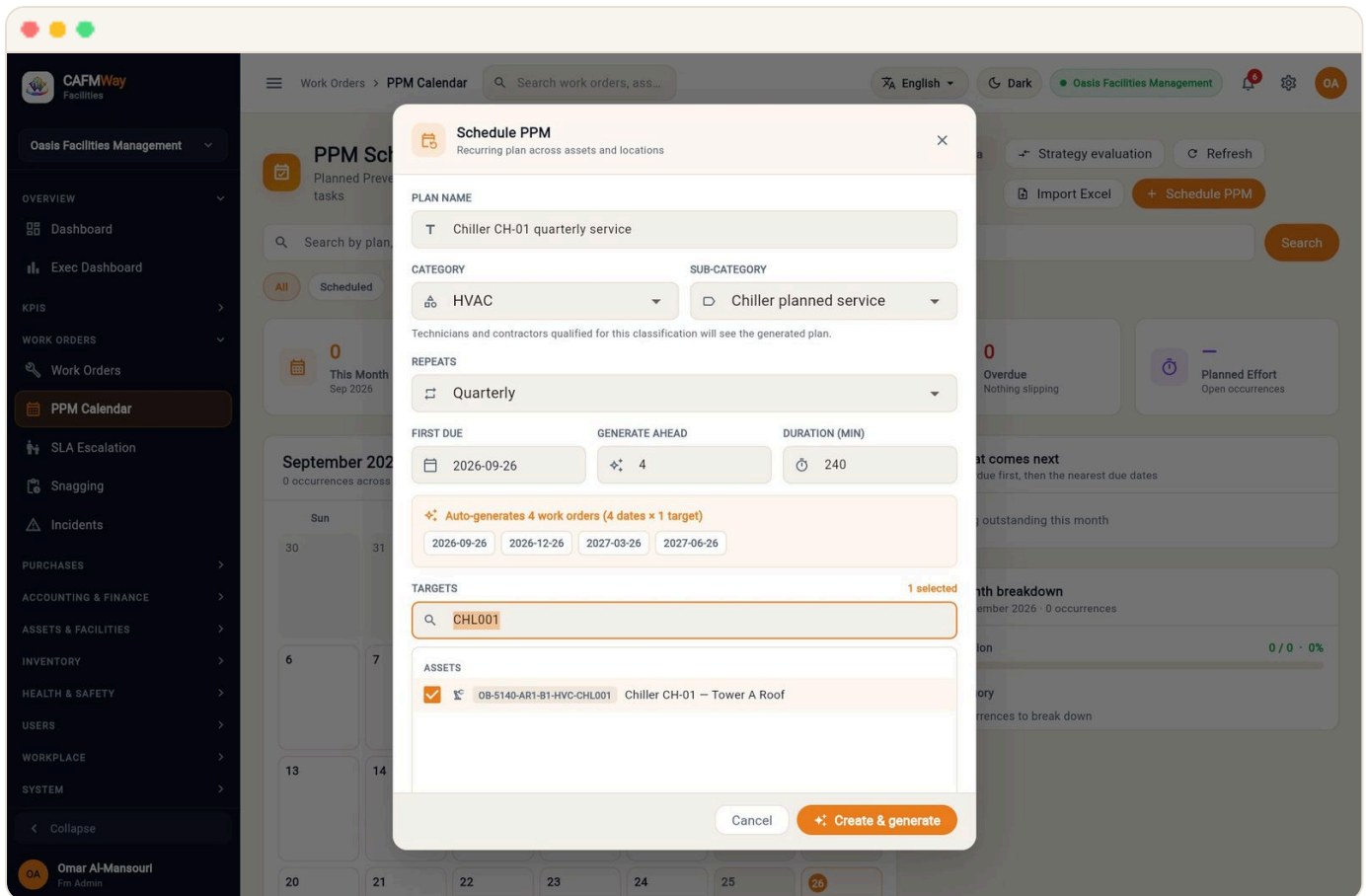


Figure 96 The Schedule PPM dialog for a quarterly chiller service with four dates and one target.

Each date and target gets a work order titled `[PPM] Chiller CH-01 quarterly service`, with type Preventive, priority Medium and status **Assigned**, numbered in a separate series (`WO-2026-0001`). The technician, the plan's owner and the dispatch pool are reminded three days before and on the due date ("PPM due today: ..."), and the job is reported as overdue after the date.

BUSINESS RULE

Generated PPM work orders have no technician. Open each one and use **Reassign** to give it to the technician who will do it, so it appears in the Technician app.

Use the calendar

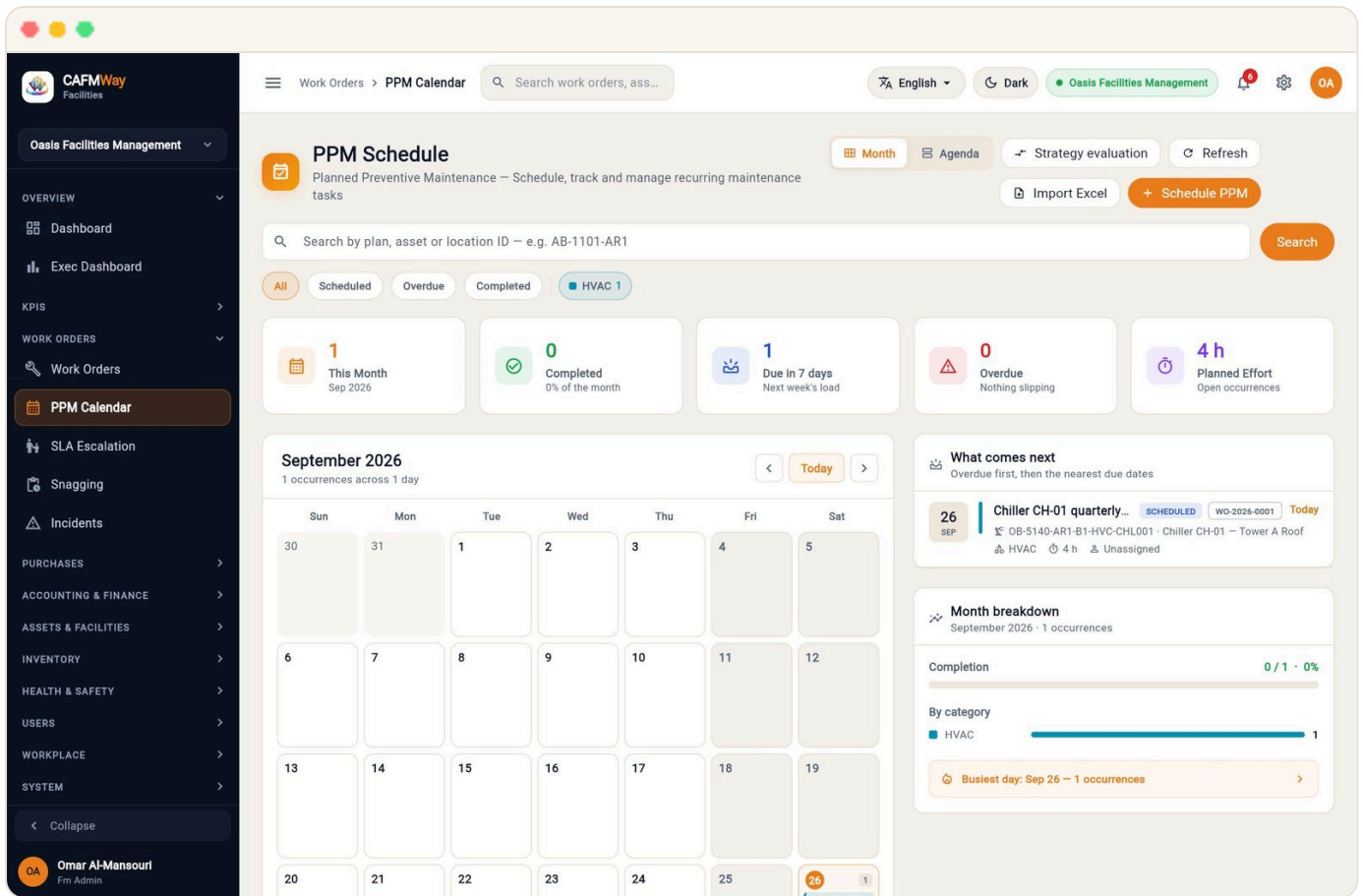


Figure 97 The PPM calendar for September with the first chiller visit on the 26th.

- **Month** shows the occurrences on a grid; **Agenda** lists them by day.
- The tiles show **This Month**, **Completed**, **Due in 7 days**, **Overdue** and **Planned Effort**.
- **What comes next** lists overdue visits first, then the nearest ones. **Month breakdown** shows completion and the split by category.
- Use the search box and the **All**, **Scheduled**, **Overdue** and **Completed** chips to filter.

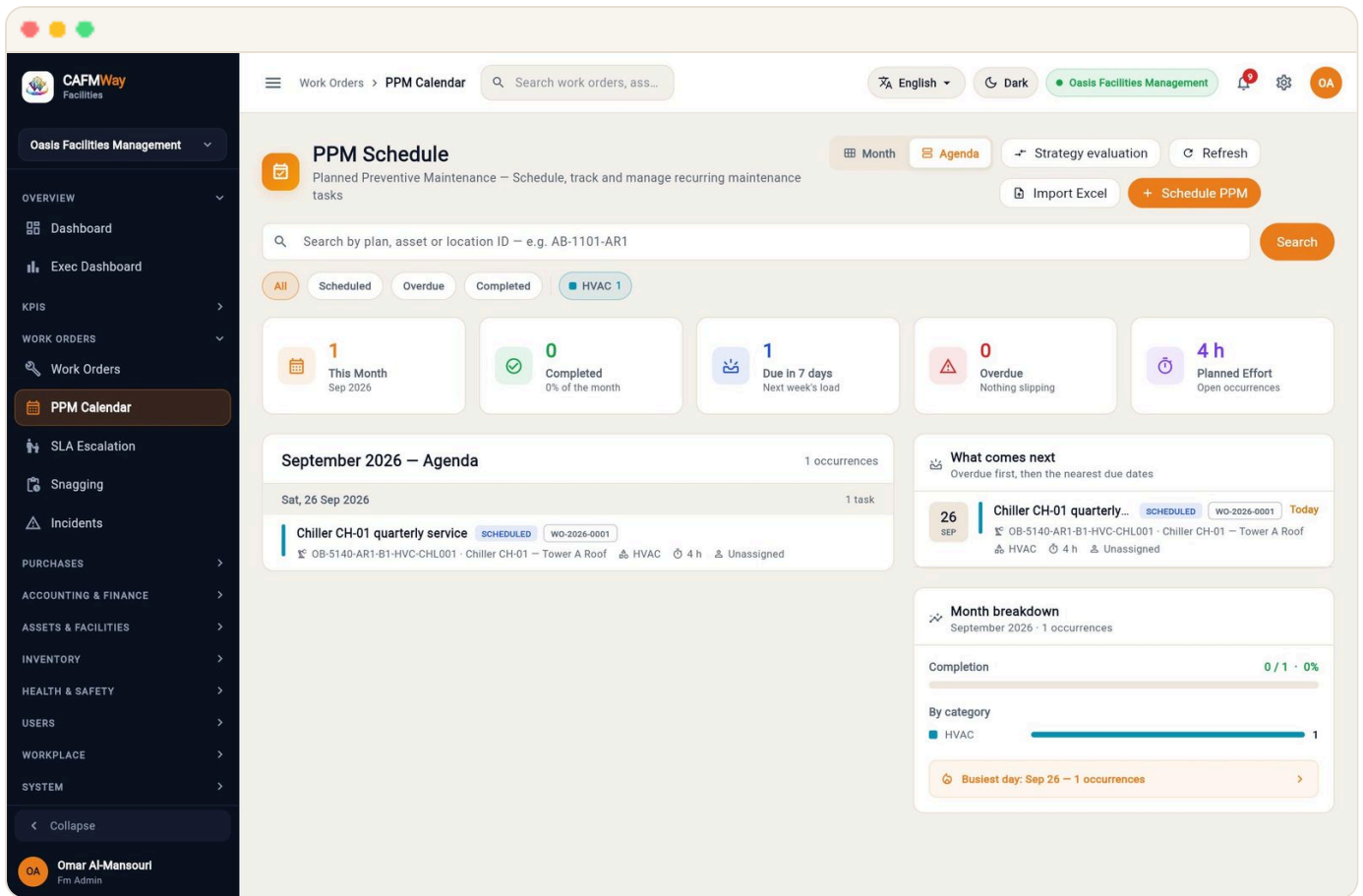


Figure 98 The agenda view of September with the chiller visit.

Click an occurrence to open it. The dialog shows the schedule, duration, asset and work order, and offers:

- **Open Work Order** — opens the generated work order, for example to reassign it.
- **Reschedule** — moves only this visit to another date, with a reason. The plan keeps its own rhythm.
- **Mark Done** — marks the visit as completed.

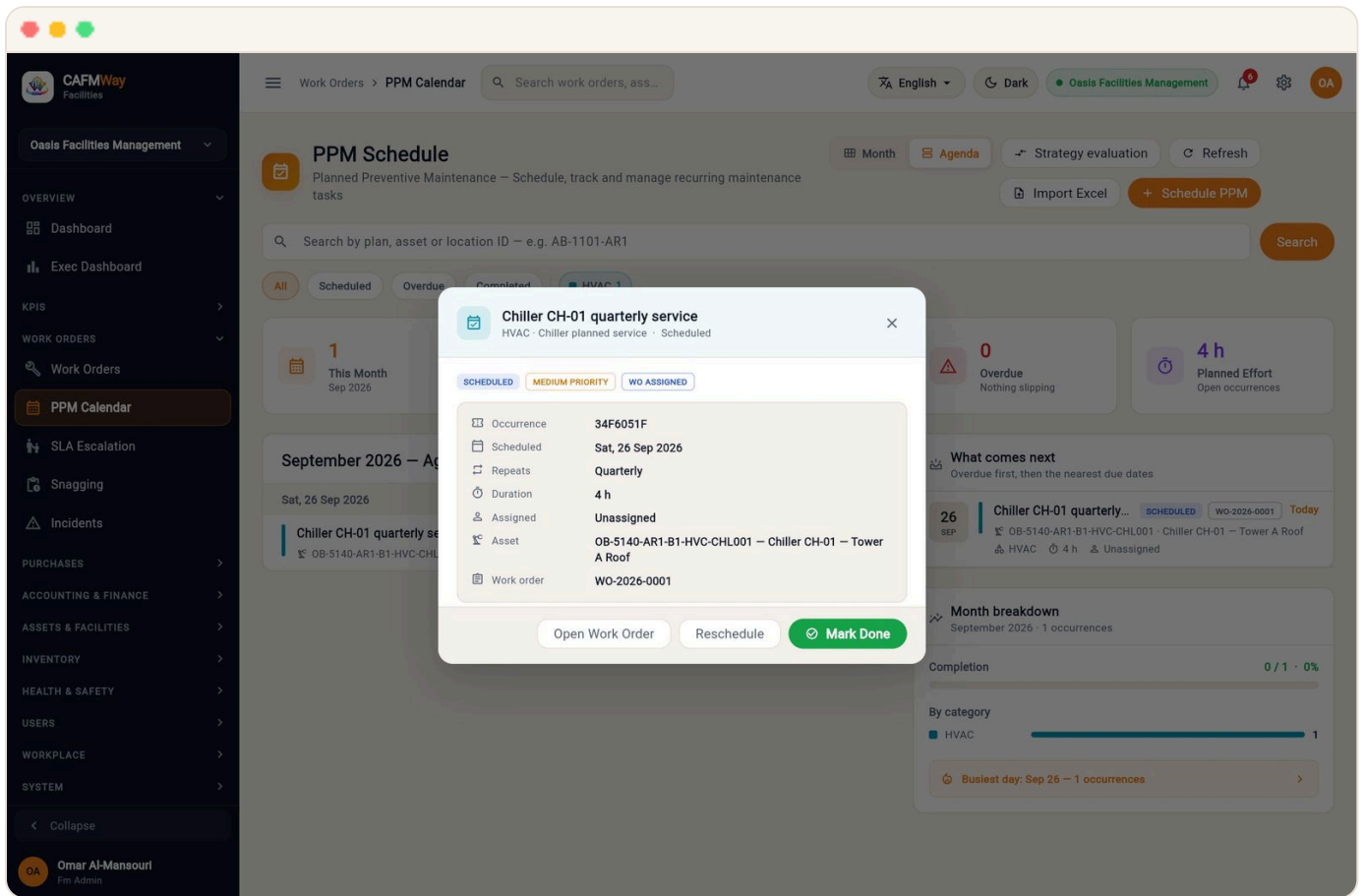


Figure 99 The occurrence dialog of the first chiller visit.

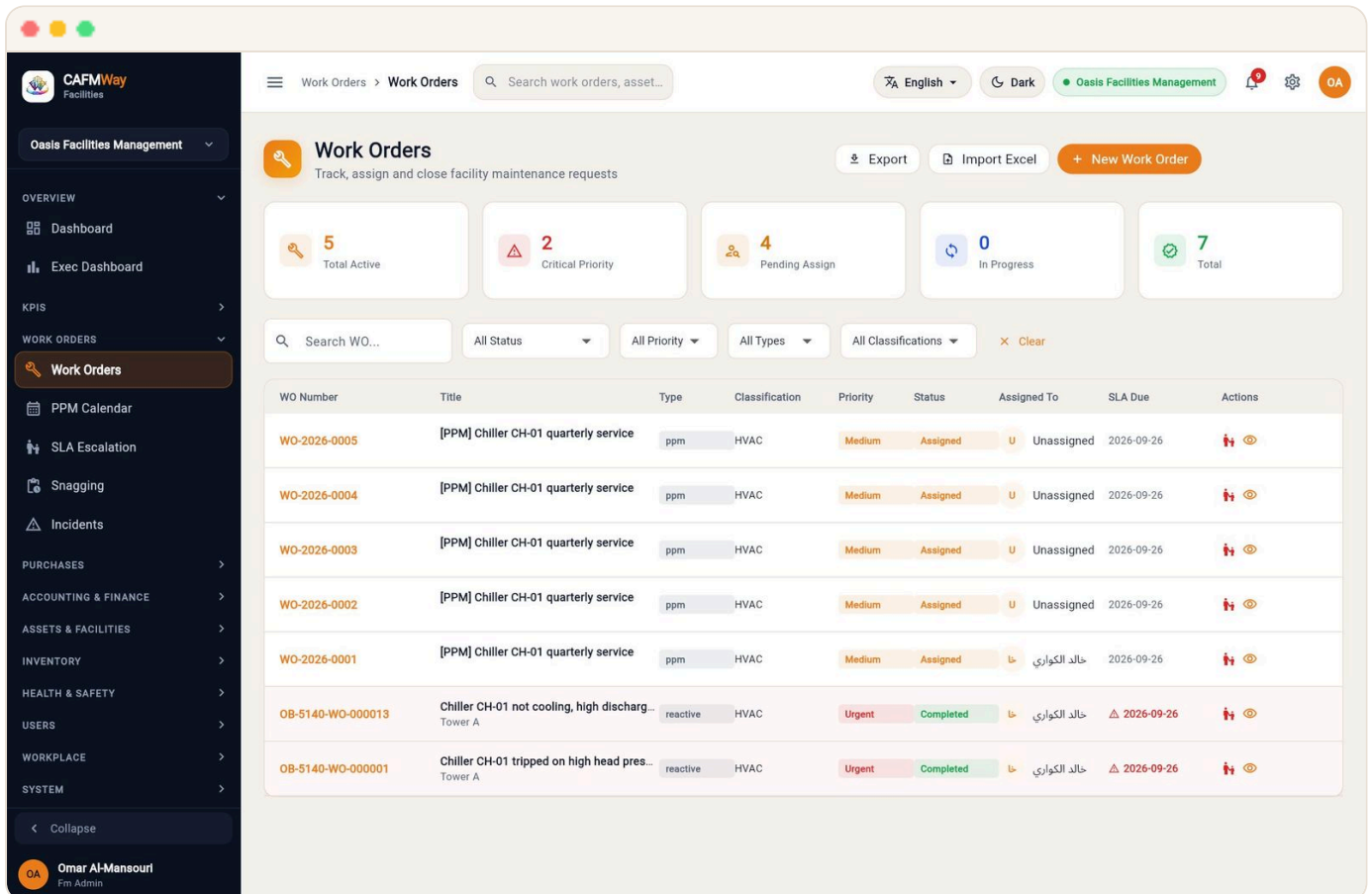


Figure 100 The chiller's work orders: the five generated PPM jobs and the earlier breakdown jobs.

NOTE

Rescheduling a visit does not move the date of its work order, and completing the work order does not mark the visit done. Update both. A plan cannot be edited or stopped from the calendar yet.

TIP

Import Excel loads many plans at once from a spreadsheet (plan name, category, frequency, start date, asset code). **Strategy evaluation** compares maintenance strategies by cost and failures per asset.

Request for Approval on work orders

Who: FM Administrator (rules); the named approvers (decisions)

Where: Sidebar → SYSTEM → **Settings** → **Approvals** tab; Sidebar → **Approvals**

Nothing needs approval until an administrator switches a rule on. With **Work order — raising** on, a work order raised by anyone who is not an approver is held: it exists but cannot be started, updated, reassigned or completed until an approver releases it.

Switch the rule on

- 1 Open **Settings** and click the **Approvals** tab. The **Request for Approval** section lists the actions that can be held, grouped by module.

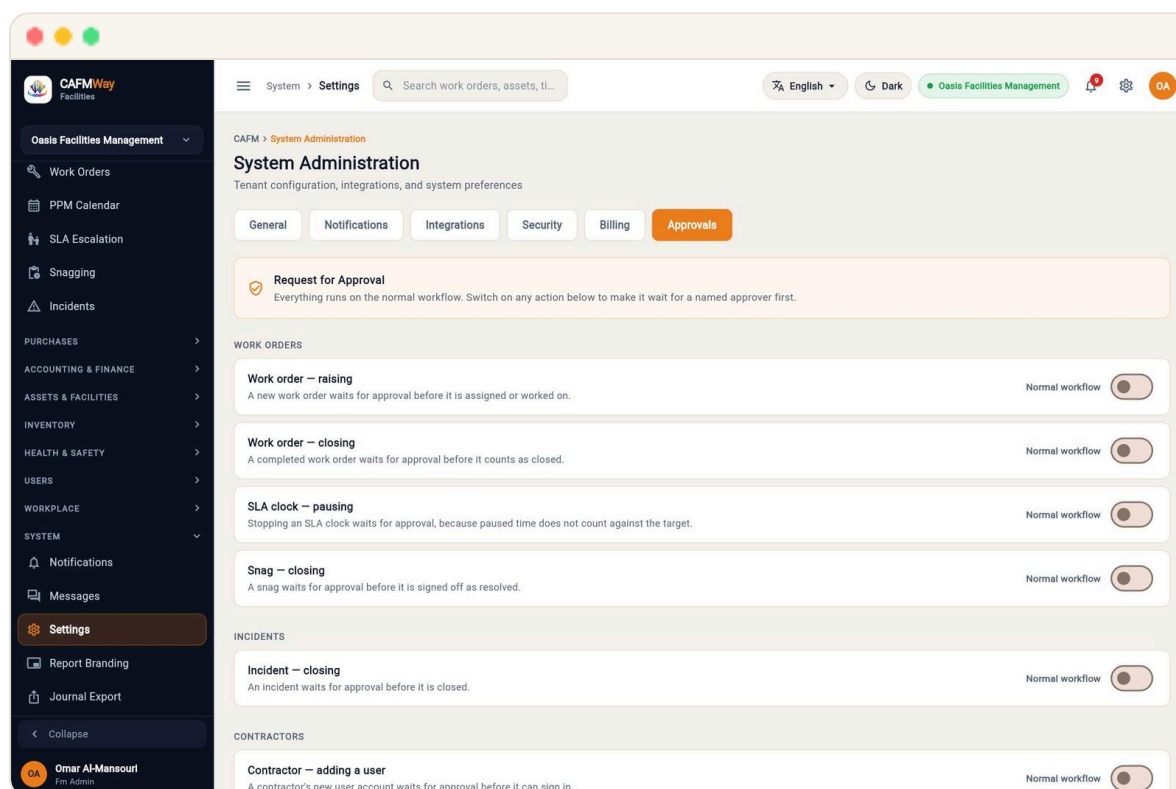


Figure 101 The Approvals tab of Settings with the work order rules.

- 2 Turn on the switch of **Work order — raising**. The rule editor opens.
- 3 Under **Who approves**, tick one or more people. Any one of them can release an item.
- 4 Optionally write a **Note for the requester (optional)**.
- 5 Click **Require approval**.

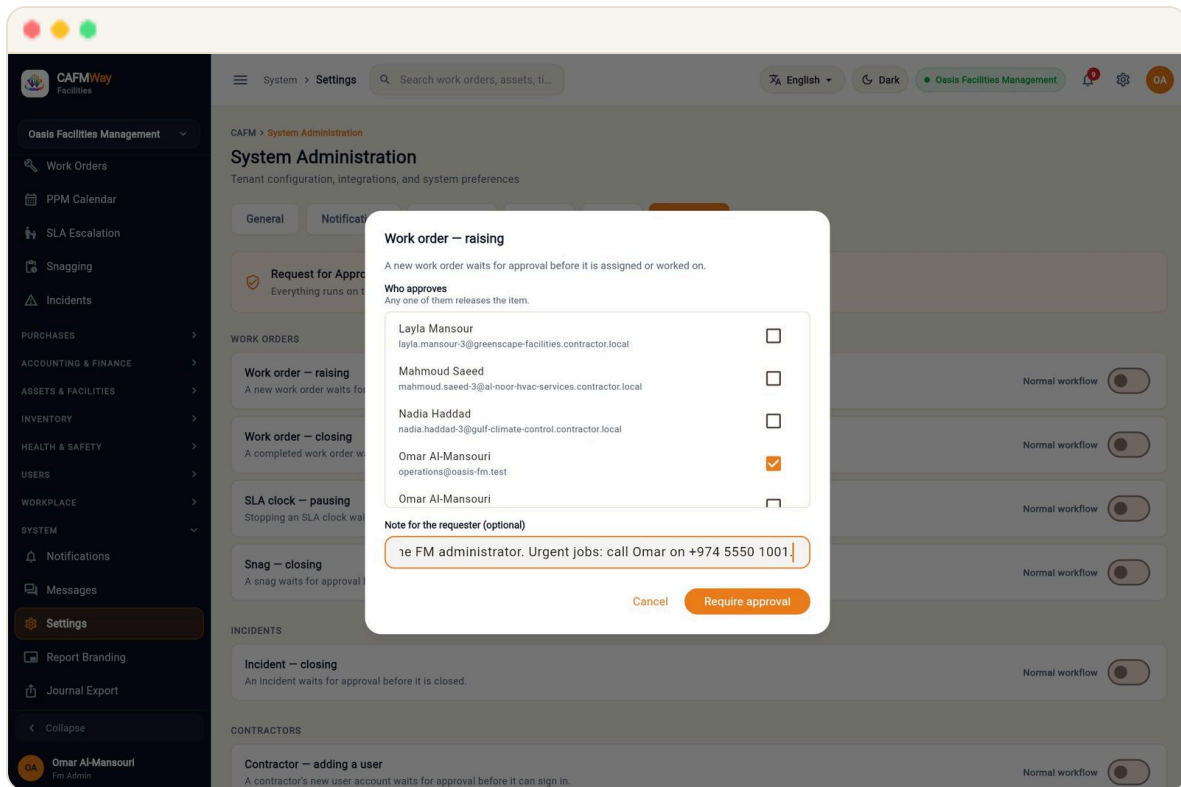


Figure 102 The rule editor with Omar Al-Mansouri as approver and a note for the requester.

Other work order rules work the same way: **Work order — closing** holds the close until approved, and **SLA clock — pausing** holds a hold request. Once a rule is on, **Add department rule** lets one department follow a different rule from the rest of the company.

CAUTION

In this release the switch does not stay visibly on after you save, and a saved rule cannot be switched off or edited from this tab. Plan the rule before you save it, and ask CAFM Way support to remove a rule you no longer need.

Raise a held work order

The helpdesk agent Noura Al-Kaabi raises

Replace stained ceiling tiles in Office 3 after the leak in the usual way. The work order is created and numbered, but it is held. Noura can follow it under **Approvals** → **Sent by me**, where it shows **Waiting**.

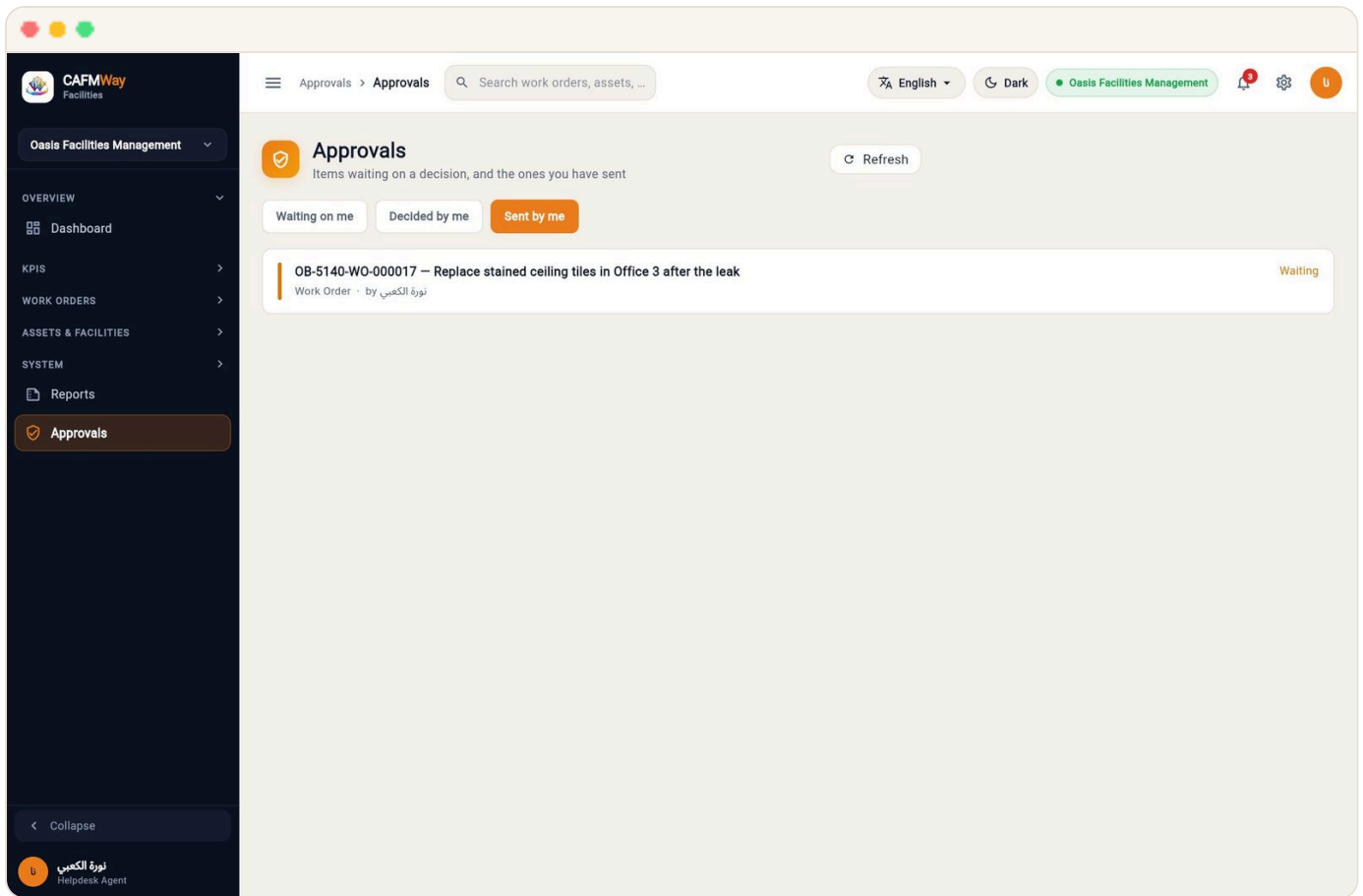


Figure 103 Noura's Sent by me list with the held work order waiting for a decision.

The approvers get an "Approval needed" notification. In the Technician app the job shows an "Awaiting approval" banner; in the Requestor app it shows "Awaiting approval".

NOTE

The web app still says "Work order created successfully" for a held work order and does not mark it on the list. Check **Sent by me** to see what is waiting.

Approve or reject

- 1 As an approver, open **Approvals** in the sidebar. **Waiting on me** shows the items you can decide, with a count.

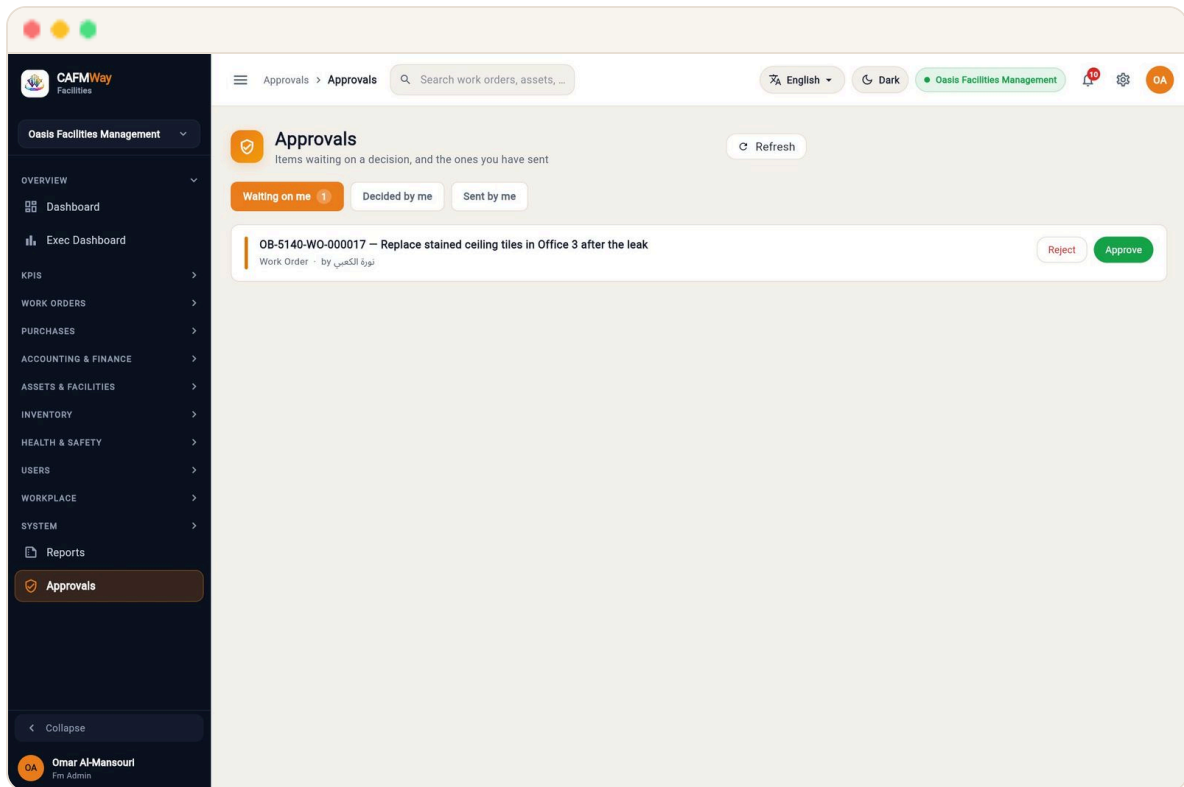


Figure 104 The approver's Waiting on me list with the ceiling-tile work order.

2

Click **Approve**. In **Approve this?**, add a **Note (optional)** and click **Approve**.

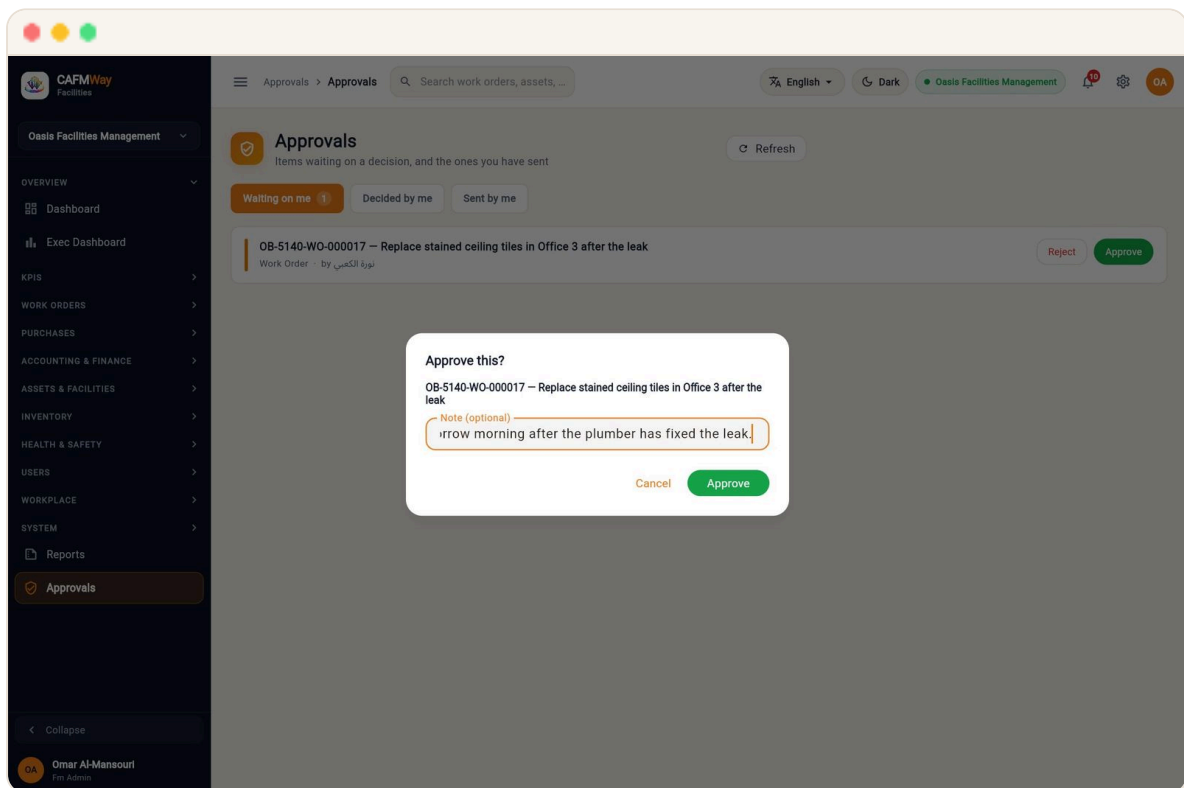


Figure 105 Approving the held work order with a note.

3

The item moves to **Decided by me** with your name and note. The requester is notified, the SLA clock starts from the approval and the technician can start work.

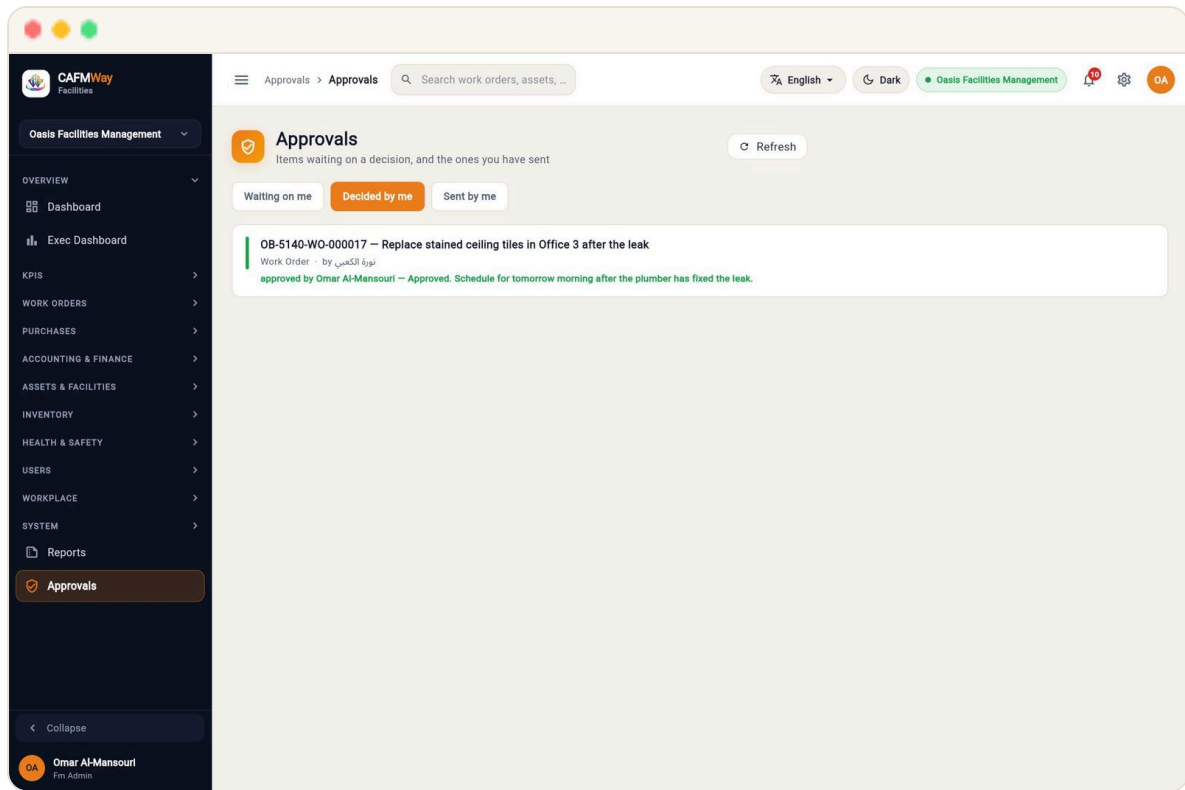


Figure 106 The decided item with the approver's note.

To refuse, click **Reject** and give a **Reason**. A rejected work order is cancelled.

BUSINESS RULE

An approver who raises a work order is not held by their own rule. The approver list of a request is fixed when it is raised; changing the rule later does not move requests already waiting. Switching a rule off does not release what is waiting; decide those items first.

Snagging

Who: Supervisor, FM Manager, FM Administrator

Where: Sidebar → WORK ORDERS → **Snagging**

Snags are defects found at handover or inspection that the builder or contractor must put right. Each snag has a number (SNG-2026-0008), a severity, a due date and, once closed, the hours it took to close.

- 1 Click **New**.
- 2 Fill **Title *** and **Description**.
- 3 Choose the **Severity (Low, Medium, High)** and the **Status (Open, In Progress, Closed)**.
- 4 Pick the person in **Assign To**, the place in **Location** and the **Due Date**.
- 5 Click **Create Snagging**. "Saved" appears and the snag is added to the list.

The screenshot shows the CAFMWay web application interface. On the left is a dark sidebar with navigation options: Overview, KPIs, Work Orders, Purchases, Accounting & Finance, Assets & Facilities, Inventory, Health & Safety, Users, Workplace, and System. The 'Snagging' option is highlighted. The main content area is titled 'Snagging' and shows a list of existing snags. A 'New Snagging' modal form is open in the center, containing the following fields: Title (handrail bracket, Tower C stair 2), Description (Handover inspection of Tower C: the second handrail bracket on stair 2 between Floor 1 and Floor 2 moves by hand. Contractor to re-fix with new anchors.), Severity (High), Status (Open), Assign To (Mervin Al-Sayid), Location (Oasis Business Park > North Campus), and Due Date (2026-09-29). At the bottom of the modal are 'Cancel' and '+ Create Snagging' buttons. The background shows a table of snags with columns for Number, Status, Severity, Location, Due Date, Hours to Close, and Actions.

Number	Status	Severity	Location	Due Date	Hours to Close	Actions
SNG-2026-0006	All	All				
SNG-2026-0004					51	
SNG-2026-0007						
SNG-2026-0005						
SNG-2026-0001						
SNG-2026-0003					6	
SNG-2026-0002						

Figure 107 A new snag for a loose handrail bracket found at the Tower C handover.

The screenshot shows the CAFMWay web application interface. On the left is a dark sidebar with navigation links: Overview (Dashboard, Exec Dashboard), KPIs, Work Orders (Work Orders, PPM Calendar, SLA Escalation), Snagging (selected), Incidents, Purchases, Accounting & Finance, Assets & Facilities, Inventory, Health & Safety, Users, Workplace, and System. The main content area is titled 'Snagging' and includes a search bar, filters for Status (All) and Severity (All), and a '+ New' button. Below these is a table of 8 snag records.

Number	Title	Severity	Status	Due	Hours to Close	Actions
SNG-2026-0008	Loose handrail bracket, Tower C sta...	High	Open	2026-09-29	—	✓ ✎ 🗑
SNG-2026-0006	Uneven skirting after cable works	Low	In Progress	2026-10-16	—	✓ ✎ 🗑
SNG-2026-0004	Door closer not self-latching — Roo...	Medium	Closed	2026-09-27	51	✎ 🗑
SNG-2026-0007	Damaged access panel in plant room	High	Open	2026-09-26	—	✓ ✎ 🗑
SNG-2026-0005	Cracked window seal — East facade	Low	Open	2026-10-13	—	✓ ✎ 🗑
SNG-2026-0001	Ceiling tile water staining — Level 3 ...	Medium	Open	2026-10-03	—	✓ ✎ 🗑
SNG-2026-0003	Loose floor tile at main entrance	High	Closed	2026-09-23	6	✎ 🗑
SNG-2026-0002	Chipped paint on stairwell handrail	Low	In Progress	2026-10-16	—	✓ ✎ 🗑

Figure 108 The Snagging list with the new snag open.

To close a snag, click the green tick in **Actions**. It closes at once and **Hours to Close** shows the time since it was raised. Use the pencil to edit a snag and the bin to delete it.

Oasis Facilities Management

OVERVIEW

Dashboard

Exec Dashboard

KPIS

WORK ORDERS

Work Orders

PPM Calendar

SLA Escalation

Snagging

Incidents

PURCHASES

ACCOUNTING & FINANCE

ASSETS & FACILITIES

INVENTORY

HEALTH & SAFETY

USERS

WORKPLACE

SYSTEM

Collapse

Omar Al-Mansouri
Fm Admin

Work Orders > Snagging

Search work orders, assets...

English

Dark

Oasis Facilities Management

Snagging

Defect tracking with photo evidence and completion time • 8 record(s)

+ New

Search...

Status: All

Severity: All

Refresh

Number	Title	Severity	Status	Due	Hours to Close	Actions
SNG-2026-0008	Loose handrail bracket, Tower C sta...	High	Closed	2026-09-29	0.01	
SNG-2026-0006	Uneven skirting after cable works	Low	In Progress	2026-10-16	—	
SNG-2026-0004	Door closer not self-latching – Roo...	Medium	Closed	2026-09-27	51	
SNG-2026-0007	Damaged access panel in plant room	High	Open	2026-09-26	—	
SNG-2026-0005	Cracked window seal – East facade	Low	Open	2026-10-13	—	
SNG-2026-0001	Ceiling tile water staining – Level 3 ...	Medium	Open	2026-10-03	—	
SNG-2026-0003	Loose floor tile at main entrance	High	Closed	2026-09-23	6	
SNG-2026-0002	Chipped paint on stairwell handrail	Low	In Progress	2026-10-16	—	

Figure 109 The snag closed, with its hours to close.

NOTE

Photos cannot be attached to snags yet.

Incidents

Who: Supervisor, FM Manager, FM Administrator, safety staff

Where: Sidebar → WORK ORDERS → **Incidents**

The incident register records accidents, near misses and other events, and the corrective work orders that follow from them.

- 1 On the **Register** tab, click **New**.
- 2 Fill **Incident Title ***, choose the **Type** (**Operational, Safety, Security, Environmental**), the **Severity** and the **Status**, and set **Occurred On**.
- 3 Pick the **Location** and, if relevant, the **Asset**.
- 4 Turn on **Near Miss** if nobody was hurt, or **Lost-time injury** and **Days lost** if someone could not work.
- 5 Describe what happened in **Description**.
- 6 Under **LINKED WORK ORDERS**, click **Add Work Order**, type what needs to be done and choose its **Priority**. Add as many as needed; each becomes a work order at the incident's location.
- 7 Click **Create Incident Management**. The incident is numbered, for example `INC-2026-0002`.

New Incident Management
Report, investigate and close incidents & near-misses

Near Miss ☒
Unplanned event that did not result in harm

Lost-time injury ☐
Someone was injured and could not work their next shift

Days lost
Working days the injured person was off

Attach scene evidence

Description
At 09:10 an accountant slipped on water pooled under the Office 3 ceiling leak but caught the desk and was not hurt. Wet-floor signs placed and the area mopped. Leak reported on SR-2026-0002.

What happened, where, and who was involved

LINKED WORK ORDERS
Raise one or more corrective work orders for this record. They inherit the selected location.

Work order 1 title
drip tray below the Office 3 AHU drain

Priority
Medium

What needs to be done

[+ Add Work Order](#)

[Cancel](#) [+ Create Incident Management](#)

Figure 110 The new incident form with the near miss details and a linked corrective work order.

Incident Management
Report, investigate and close incidents & near-misses • 2 record(s)

Filters: Status: All, Severity: All, Type: All, Near miss: All

[Refresh](#)

Number	Title	Type	Severity	Status	Near miss	Location	Actions
INC-2026-0002	Near miss: staff member slipped...	Safety	Minor	Open	Yes	Office 3	Edit Delete
INC-2026-0001	Compressor oil spilled on the roof...	Environmental	Minor	Open	Yes	Tower A	Edit Delete

Figure 111 The incident register with the new near miss.

Open an incident with the arrow icon to see its **Overview**, **Investigation**, **Response**, **Actions & CAPA** and **Work Orders** tabs. On **Work Orders**, **Generate corrective work order** raises another job; the linked jobs are listed with their status.

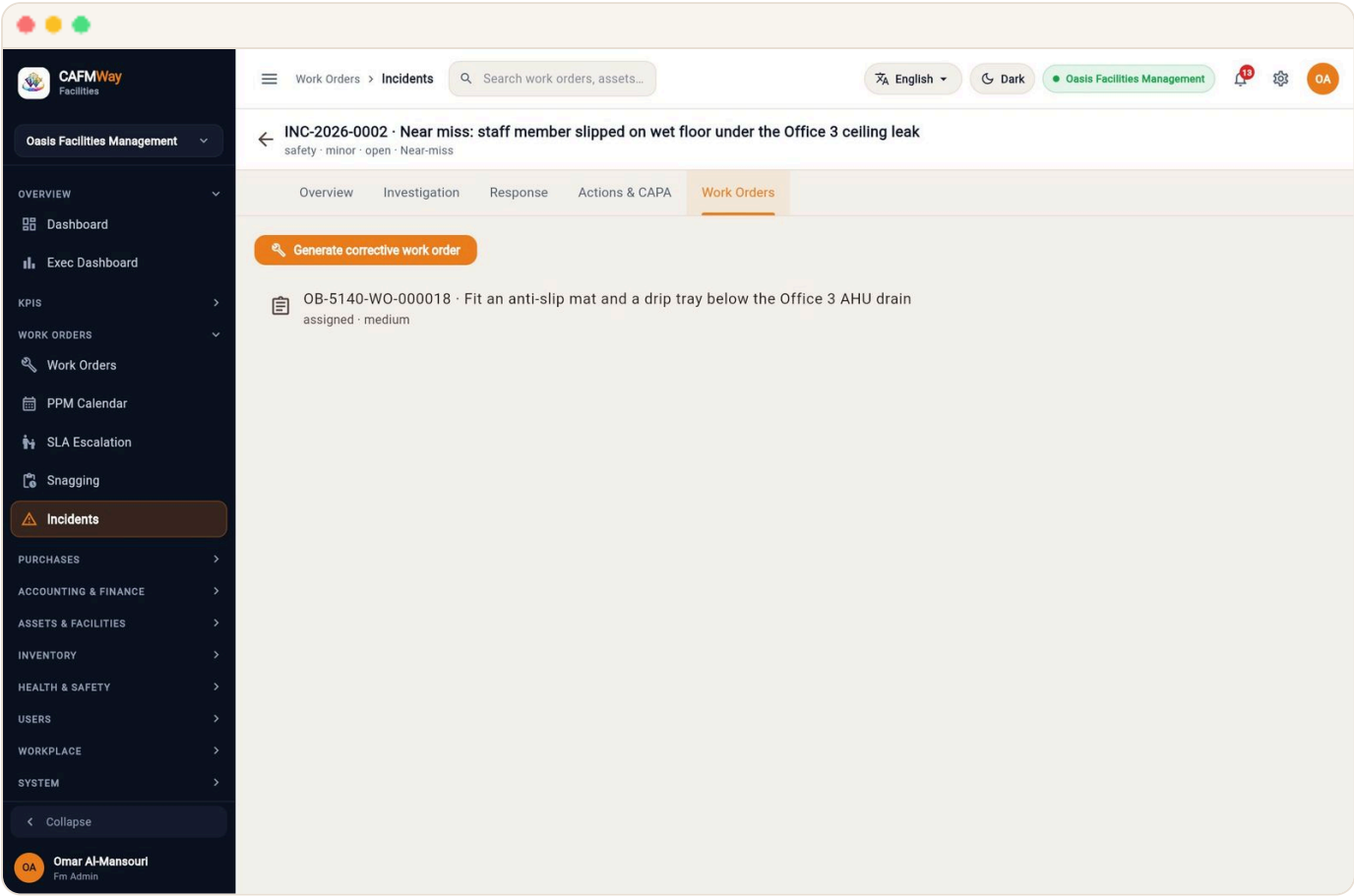


Figure 112 The Work Orders tab of the incident with its corrective work order.

TIP

The **Analytics** tab summarises incidents by type and severity, and the **Incident Register** report lists them for a period.

Purchasing and stores

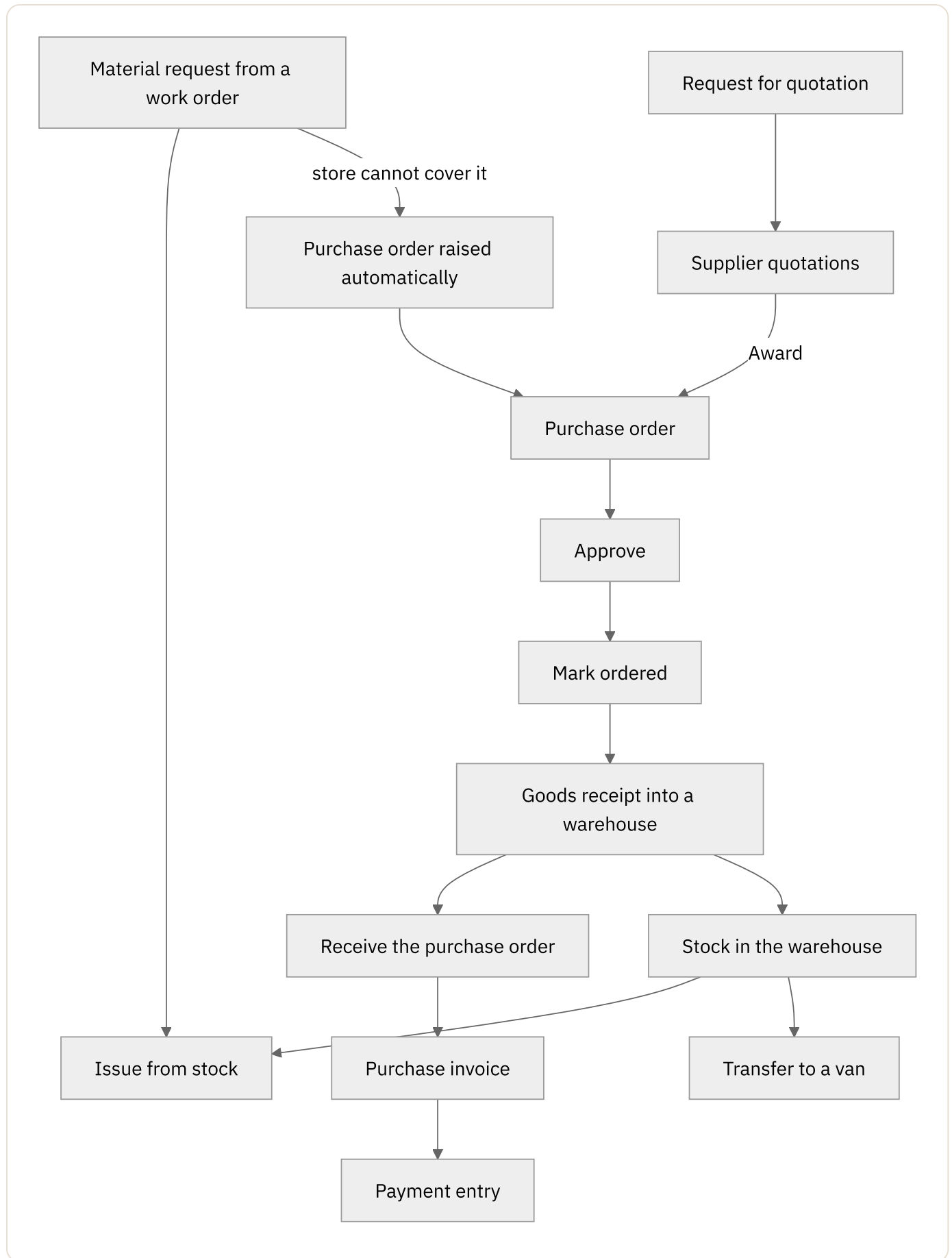
This part covers buying and holding spare parts: units of measure, the item catalogue, warehouses and technician vans, suppliers, the procure-to-pay chain from request for quotation to payment, and the stores work that follows (issues to work orders, transfers, counts, valuation and replenishment). It is written for storekeepers, buyers, FM managers and the company administrator.

Procure-to-pay at a glance

Who: FM Administrator and FM Manager (everything); Procurement Officer (suppliers, items, warehouses, RFQs, quotations, purchase orders, stock documents); Finance Officer (purchase invoices and payments); Supervisor (material requests, counting)

Where: Sidebar → **PURCHASES** and **INVENTORY**

The examples in this part follow one story at Oasis Facilities Management. The stores team loads its opening stock into the **Main Store - Industrial Area**, tops up the technicians' vans, and buys a quarter's worth of AHU filters, compressor capacitors and V-belts for the PPM programme:



Each document has its own statuses:

Document	Number	Statuses, in order	Posts to the ledger
Material request	on the work order	Requested → Approved → Authorised → Issued; or Ordered → Received when the store could not cover it; Rejected, Cancelled	Issue: yes
Request for quotation	RFQ-2026-0001	Draft → Submitted; Cancelled	No
Supplier quotation	SQ-2026-0002	Draft → Submitted → Ordered; Lost, Cancelled	No
Purchase order	PO-2026-0001	Pending Approval → Approved → Ordered → Received; Cancelled (rejected)	No
Goods receipt (stock document)	SE-2026-00005	Draft → Submitted; Cancelled (reversed)	Yes
Purchase invoice	PINV-2026-0010	Pending → Approved → Paid; Cancelled	Yes, on approval
Payment entry	PE-2026-0002	Draft → Submitted; Cancelled	Yes, on posting
Stock count	SC-2026-00001	Scheduled → Counting → Awaiting approval → Approved; Cancelled	Yes, on approval

Suggested order for a new company:

- 1 Units of measure, then suppliers, then items.
- 2 Warehouses, including one van per technician who carries stock.
- 3 Opening stock into the main store, then transfers to the vans.
- 4 From then on, buy through RFQ → quotation → purchase order → goods receipt → invoice → payment, and issue parts against work orders.

BUSINESS RULE

Stock is valued at a moving average per item and warehouse. A receipt changes the average; an issue, transfer or write-off takes stock out at the current average. Every valued movement posts to the general ledger at once (see Accounting).

TIP

Some purchasing lists are wider than the screen. If a row's action buttons are cut off at the right edge, collapse the sidebar with the menu button at the top left.

Units of measure

Who: FM Administrator, FM Manager, Procurement Officer

Where: Sidebar → INVENTORY → **Units of Measure**

Units are grouped into categories (Count, Weight, Volume, Length, Area, Time, Other). Each category has one base unit, and every other unit in the category states how many base units it holds.

- 1 Click **New unit**.
- 2 Enter the **Unit name** and **Symbol**, and choose the **Category**.
- 3 Tick **Base unit for this category** for the first unit of a category (for example **Piece**, **Metre**, **Kilogram**, **Litre**). For any other unit, enter the **Conversion factor** instead (1 Box = 12 Piece).
- 4 Tick **Whole numbers only** for units that cannot be split, such as pieces, boxes and rolls.
- 5 Add a **Description** and click **Create unit**.

The screenshot shows the 'New unit of measure' modal form. The form fields are as follows:

- Unit name ***: Box
- Symbol**: box
- Category**: Count
- Base unit for this category**: ☐ (unchecked)
- Conversion factor (1 Box = ? Piece)**: 12
- Whole numbers only**: ☒ (checked)
- Enabled**: ☒ (checked)
- Description**: Carton of 12 pieces, as filters are delivered.

The background shows the 'Units of Measure' page with a table listing units. The first unit is 'Piece' with a conversion factor of 1 and is marked as the 'BASE' unit.

Figure 113 The new-unit form for a box of 12 pieces

The list shows each unit's conversion, its rules and how many items use it.

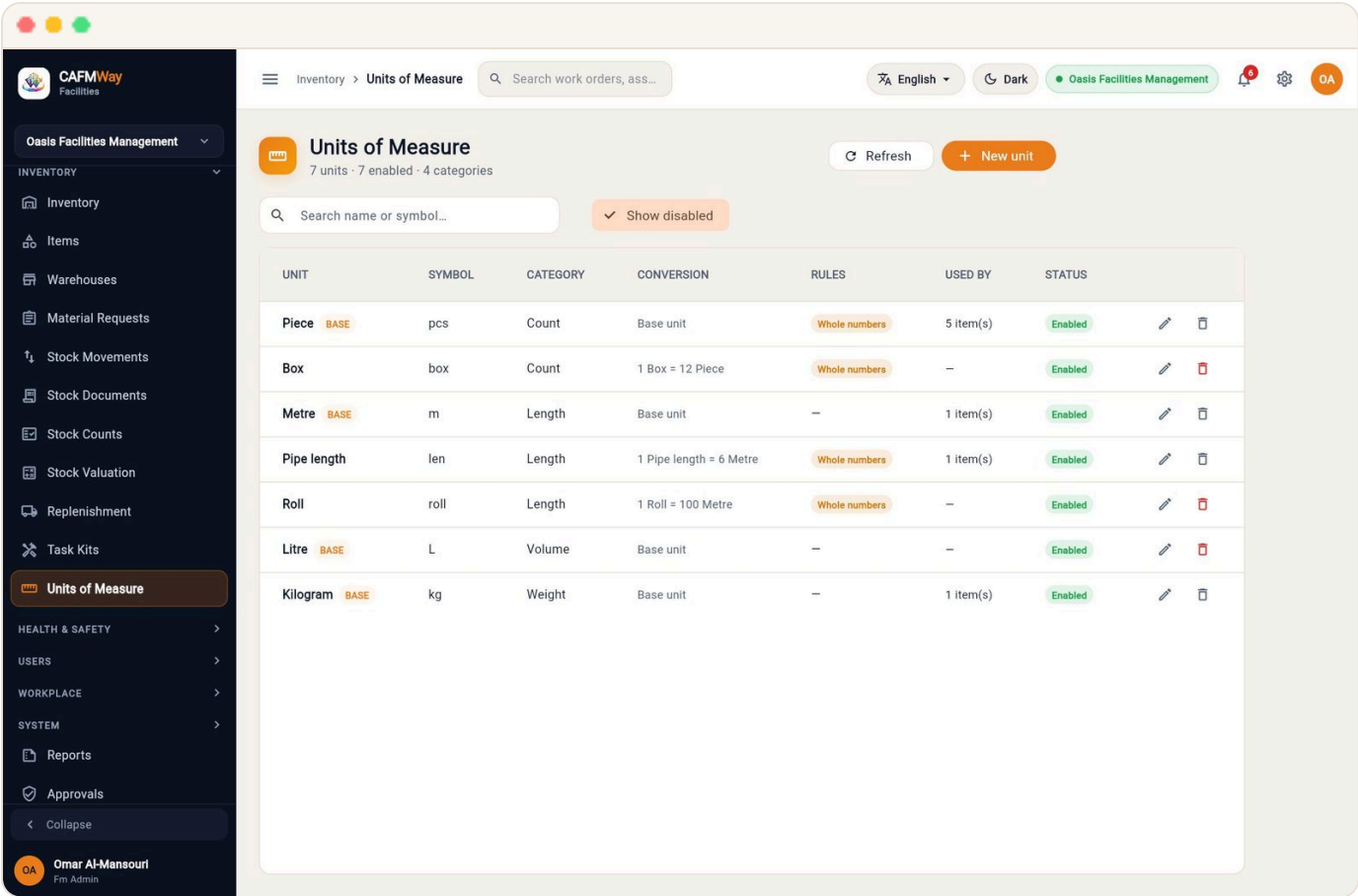


Figure 114 Units of measure: base units marked BASE, with Box, Pipe length and Roll converting to their base unit

BUSINESS RULE

Unit names are unique. Choosing a new base unit for a category replaces the old one. A unit that is used by an item cannot be deleted (the delete icon is greyed); untick **Enabled** instead, so it stays on existing items but is no longer offered.

NOTE

The conversion factor is for reference. Quantities are not converted between units on documents, so buy and stock each item in its own stock unit.

Suppliers

Who: FM Administrator, FM Manager, Procurement Officer, Finance Officer

Where: Sidebar → PURCHASES → **Suppliers**

Suppliers are the companies you buy goods from. Service contractors are kept separately under **Contractors**.

- 1 Click **New supplier**.
- 2 Under IDENTITY enter the **Supplier name**, a **Supplier code** (for example SUP-GHV) and a **Supplier group** (HVAC, Electrical, Plumbing).
- 3 Fill in CONTACT and ADDRESS: primary contact, email, mobile, address, city and country.
- 4 Under TAX enter the **Tax ID / VAT / CR**.
- 5 Under ACCOUNTING TERMS keep **Default currency** at QAR and enter the **Payment terms**, **Credit limit** and **Credit days**.
- 6 Under BANKING enter the bank name, account number, IBAN and SWIFT code.
- 7 Click **Create supplier**.

The screenshot shows the 'New supplier' form in the CAFMWay web application. The form is divided into several sections:

- Location:** Country (Qatar) and Postal code.
- TAX:** Tax ID / VAT / CR (CR 45872), Tax category, and Withholding category.
- ACCOUNTING TERMS:** Default currency (QAR), Payment terms (Net 30), Credit limit (100000), and Credit days (30).
- BANKING:** Bank name (Qatar National Bank), Account number (0013-458720-001), IBAN (QA58QNBA000000000013458720001), and SWIFT (QNBAQAQA).
- STATUS:** Radio buttons for Disabled, On hold, and Transporter.
- NOTES:** A text area for additional information.

 At the bottom right of the form are 'Cancel' and 'Create supplier' buttons. The left sidebar shows the navigation menu with 'Suppliers' highlighted under the 'PURCHASES' section. The top header includes the CAFMWay logo, user profile (Omar Al-Mansouri), and language/theme settings.

Figure 115 The supplier form for Gulf HVAC Supplies WLL, scrolled to the tax, terms and banking sections

To stop buying from a supplier for a while, open it with the pencil icon, tick **On hold** and choose a **Hold type (Block everything, Block invoices or Block payments)**. Al Noor Plumbing Materials is on hold while a pricing dispute is settled.

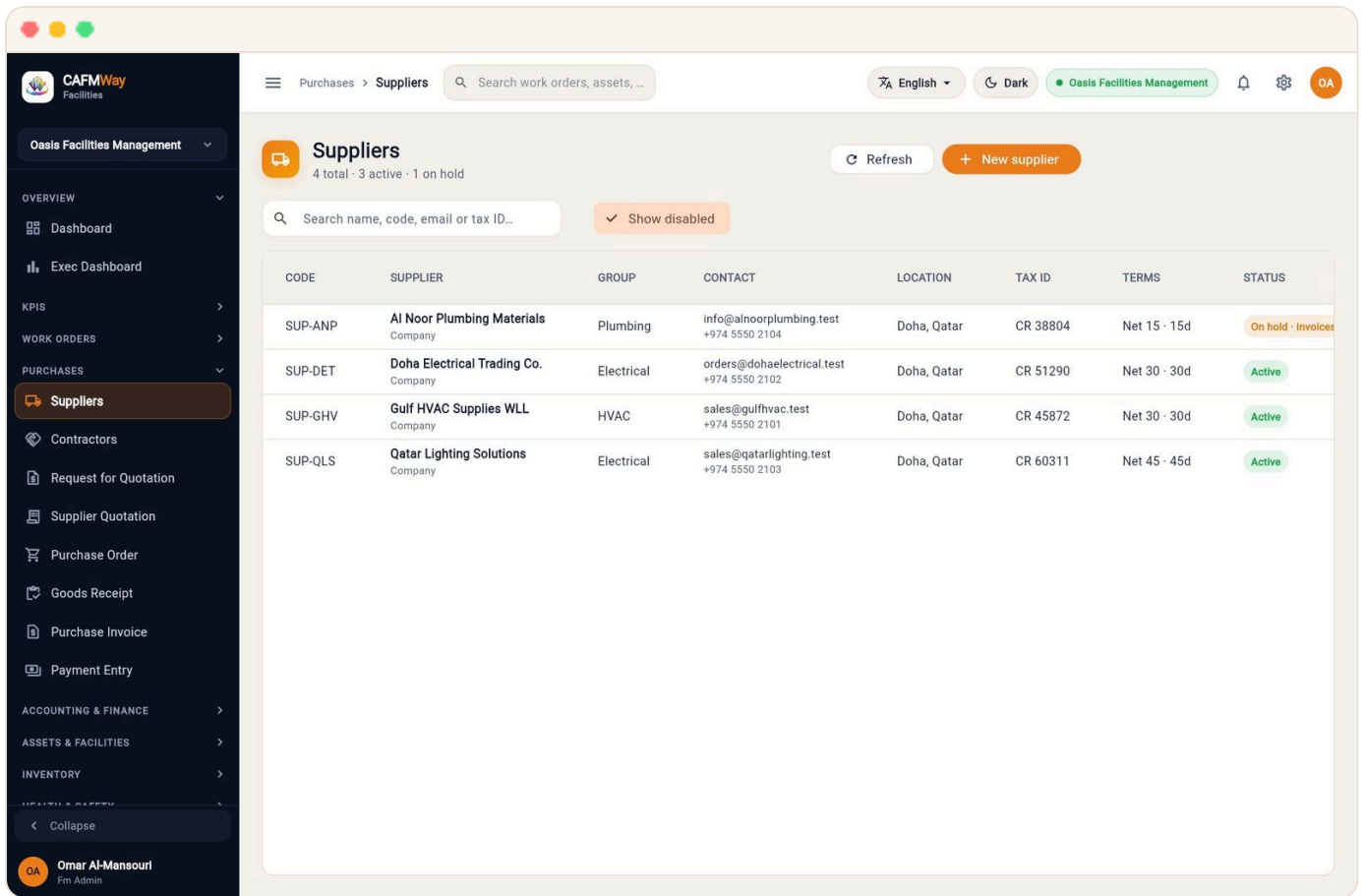


Figure 116 The suppliers list with three active suppliers and one on hold

BUSINESS RULE

Supplier codes are unique. A supplier that is on hold or disabled is not offered when you pick suppliers for an RFQ, a quotation or an item's default supplier. A supplier used by a purchase order or by an item cannot be deleted.

Items and spare parts

Who: FM Administrator, FM Manager, Procurement Officer; Supervisor can edit

Where: Sidebar → INVENTORY → **Items**

The item catalogue is used by every stock document, count and replenishment level. Oasis stocks eight parts:

Code	Item	Unit	Reorder level	Default supplier	Valuation rate (QAR)
FLT-G4-595	Panel filter G4 595x595x48 mm	Piece	20	Gulf HVAC Supplies WLL	42
CAP-35-5	Run capacitor 35+5 uF 440 V	Piece	8	Gulf HVAC Supplies WLL	38
CON-3P-32A	Contactor 3-pole 32 A, 230 V coil	Piece	6	Doha Electrical Trading Co.	95
LED-6060-40	LED panel 600x600 40 W 4000 K	Piece	15	Qatar Lighting Solutions	65
PVC-110-6M	uPVC drain pipe 110 mm x 6 m	Pipe length	6	Doha Electrical Trading Co.	58
REF-R410A	Refrigerant R410A	Kilogram	20	Gulf HVAC Supplies WLL	45
VBT-A42	V-belt A42	Piece	10	Gulf HVAC Supplies WLL	18
CBL-2.5-TE	Cable 2.5 mm ² twin and earth	Metre	150	Doha Electrical Trading Co.	3

- 1 Click **New item**.
- 2 Under IDENTITY enter the **Item code**, **Item name**, **Item group**, **Brand** and **Stock UOM**. Pick the unit from the suggestions that appear as you type.
- 3 Under CLASSIFICATION keep **Maintain stock** and **Purchase item** ticked for spare parts.
- 4 Under STOCK LEVELS enter the **Minimum level**, **Reorder level**, **Reorder qty**, **Safety stock** and **Maximum level**. Leave **Opening / current qty** empty; opening stock is entered with a

stock document (see Opening stock).

- 5 Under PURCHASING choose the **Default supplier** and enter the **Minimum order qty**, **Lead time (days)** and **Last purchase rate**.
- 6 Under VALUATION enter the **Valuation rate** and set **Valuation method** to **Moving average**.
- 7 Click **Create item**.

The screenshot shows the 'New item' form in the CAFM Way web application. The form is titled 'New item' and has a close button (X) in the top right corner. It is divided into several sections: 'Description' (a text input field), 'CLASSIFICATION' (checkboxes for 'Maintain stock', 'Purchase item', 'Sales item', 'Fixed asset', 'Batch tracked', 'Serial tracked', and 'Disabled'), 'STOCK LEVELS' (input fields for 'Opening / current qty', 'Reorder level', 'Safety stock', 'Minimum level', 'Reorder qty', and 'Maximum level'), 'PURCHASING' (a dropdown for 'Default supplier' set to 'Gulf HVAC Supplies WLL', and input fields for 'Minimum order qty', 'Lead time (days)', and 'Last purchase rate'), and 'VALUATION' (input fields for 'Valuation rate' and 'Standard selling rate', and a dropdown for 'Valuation method'). At the bottom right are 'Cancel' and 'Create item' buttons. The background shows the CAFM Way interface with a sidebar menu and a top navigation bar.

Figure 117 The item form for the G4 panel filter: stock levels, default supplier and valuation rate

The list shows the stock on hand across all warehouses. A red figure with a warning sign means the item is at or below its reorder level.

CODE	ITEM	GROUP	BRAND	UOM	STOCK	VALUATION	SUPPLIER
OB-5140-AR1-B1-HVC-AHU001	Air Handling Unit AHU-B1	HVAC	—	Unit	1	0.00	—
CBL-2.5-TE	Cable 2.5 mm2 twin and earth	Electrical	Ducab	Metre	288	3.00	Doha Electrical Trading
OB-5140-AR1-B1-HVC-CHL001	Chiller CH-01 — Tower A Roof	HVAC	—	Unit	1	0.00	—
CON-3P-32A	Contactor 3-pole 32 A, 230 V coil	Electrical	Schneider	Piece	6	95.00	Doha Electrical Trading
OB-5140-AR1-B1-F1-R2-FIR-FAP001	Fire Alarm Panel FAP-B	Fire Safety	—	Unit	1	0.00	—
LED-6060-40	LED panel 600x600 40 W 4000 K	Lighting	Lumina	Piece	28	65.00	Qatar Lighting Solution
FLT-G4-595	Panel filter G4 595x595x48 mm	Filters	AirPure	Piece	152	42.00	Gulf HVAC Supplies W
OB-5140-AR1-B1-ELV-PLF001	Passenger Lift L-01 — Tower A	Elevator	—	Unit	1	0.00	—
OB-5140-AR1-B1-F1-R8-HVC-SPU001	Precision AC — Server Room	HVAC	—	Unit	1	0.00	—
REF-R410A	Refrigerant R410A	Refrigerants	Chemours	Kilogram	23	45.00	Gulf HVAC Supplies W
CAP-35-5	Run capacitor 35+5 uF 440 V	Compressor spares	Ducati	Piece	31	38.00	Gulf HVAC Supplies W
VBT-A42	V-belt A42	Mechanical spares	Gates	Piece	40	18.00	Gulf HVAC Supplies W
PVC-110-6M	uPVC drain pipe 110 mm x 6 m	Plumbing	Aquaflow	Pipe length	10	58.00	Doha Electrical Trading

Figure 118 The items list with stock, valuation rate and default supplier

BUSINESS RULE

Item codes are unique. An item used on a purchase order or a material request cannot be deleted; tick **Disabled** instead.

NOTE

The valuation rate is used when opening stock is entered without a rate. After that, stock is always valued at the moving average, whatever **Valuation method** says.

NOTE

Each asset registered under Assets also appears in this list as a one-unit item carrying the asset code.

Warehouses and technician vans

Who: FM Administrator, FM Manager, Procurement Officer create; Supervisor can edit

Where: Sidebar → INVENTORY → **Warehouses**

A warehouse is any place stock is kept: a main store, a site store, a quarantine area for damaged stock, or a technician's van. Oasis uses five:

Code	Name	Type	Parent
MAIN	Main Store - Industrial Area	Main store	none
SITE-WB	West Bay Tower Site Store	Site store	MAIN
QRN	Quarantine - damaged and suspect stock	Quarantine	MAIN
VAN-01	Van 01 - Khalid	Van	MAIN
VAN-02	Van 02 - Yousef	Van	MAIN

- 1 Click **New warehouse**.
- 2 Enter the **Code** (it cannot be changed later), the **Name** and the **Arabic name (optional)**.
- 3 Choose the **Type**: Main store, Site store, Building, Van, Quarantine, Repair or Scrap.
- 4 Choose the **Parent warehouse**. A van draws its top-ups from its parent.
- 5 For a van, choose the **Custodian** (the technician who carries it) and enter the **Number plate (optional)**.
- 6 Click **Save**.

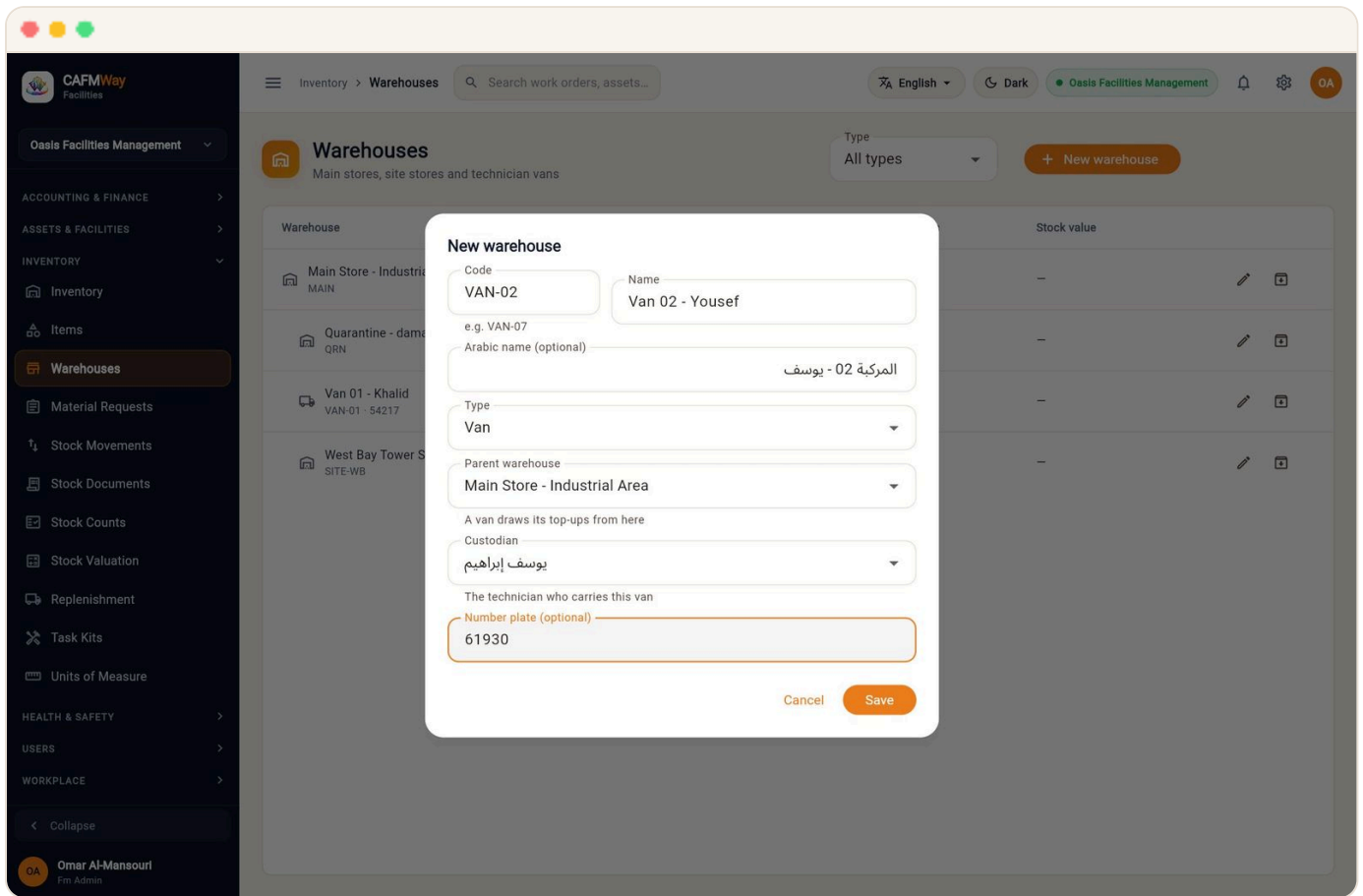


Figure 119 The new-warehouse form for Van 02, with custodian and number plate

The list shows the warehouses as a tree, with the number of items held and the stock value of each.

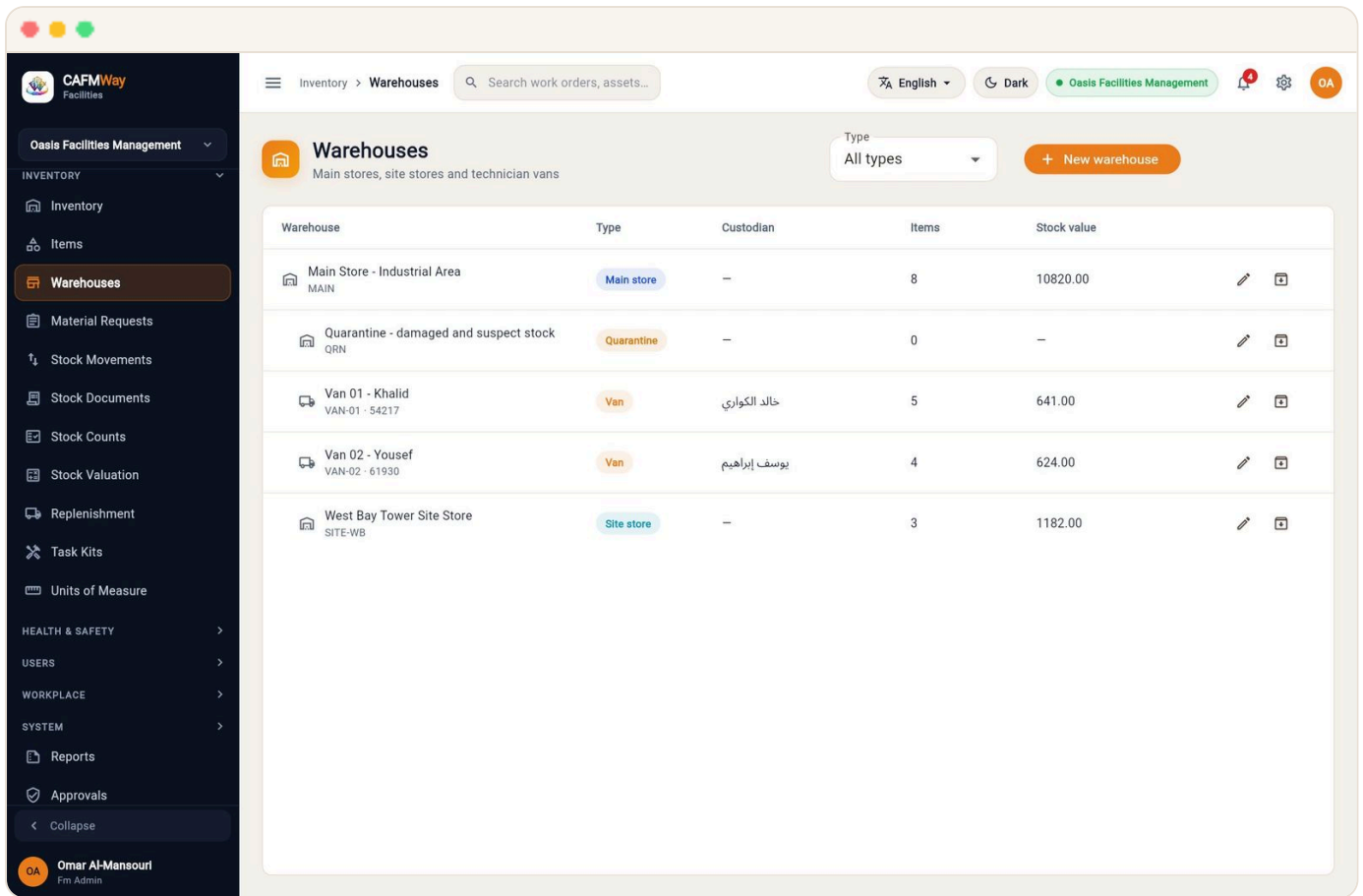


Figure 120 Warehouses: the main store with its site store, quarantine area and two vans

BUSINESS RULE

A van needs a custodian. A warehouse that still holds stock cannot be closed; transfer or write off the stock first. Closed warehouses are kept, not deleted.

Opening stock

Who: FM Administrator, FM Manager, Procurement Officer

Where: Sidebar → INVENTORY → **Stock Documents**

Enter what is already on the shelves when you start using CAFM Way as an opening document, one per warehouse.

- 1 Click **New document**.
- 2 Set **What happened** to **Opening — what was already there**.
- 3 Set **To** to the warehouse, for example **Main Store - Industrial Area**.
- 4 Click **Add a line** for each item, pick the **Item** by code or name and enter the **Qty**.
- 5 Enter **Remarks (optional)**, for example the date of the stock-take.
- 6 Keep **Post it now** ticked and click **Post**.

Item	Qty
FLT-G4-595 – Panel filter G4 595x595x48 mm	60
CAP-35-5 – Run capacitor 35+5 uF 440 V	12
CON-3P-32A – Contactor 3-pole 32 A, 230 V coil	6
LED-6060-40 – LED panel 600x600 40 W 4000 K	30
PVC-110-6M – uPVC drain pipe 110 mm x 6 m	10
REF-R410A – Refrigerant R410A	25
VBTA42 – V-belt A42	16
CBL-2.5-TE – Cable 2.5 mm2 twin and earth	300

Figure 121 Opening stock for the main store: eight items from the go-live stock-take

The opening lines are valued at each item's valuation rate, so the main store opens at 60 filters at QAR 42, 12 capacitors at QAR 38 and so on. The document posts to the ledger against retained earnings (see Accounting).

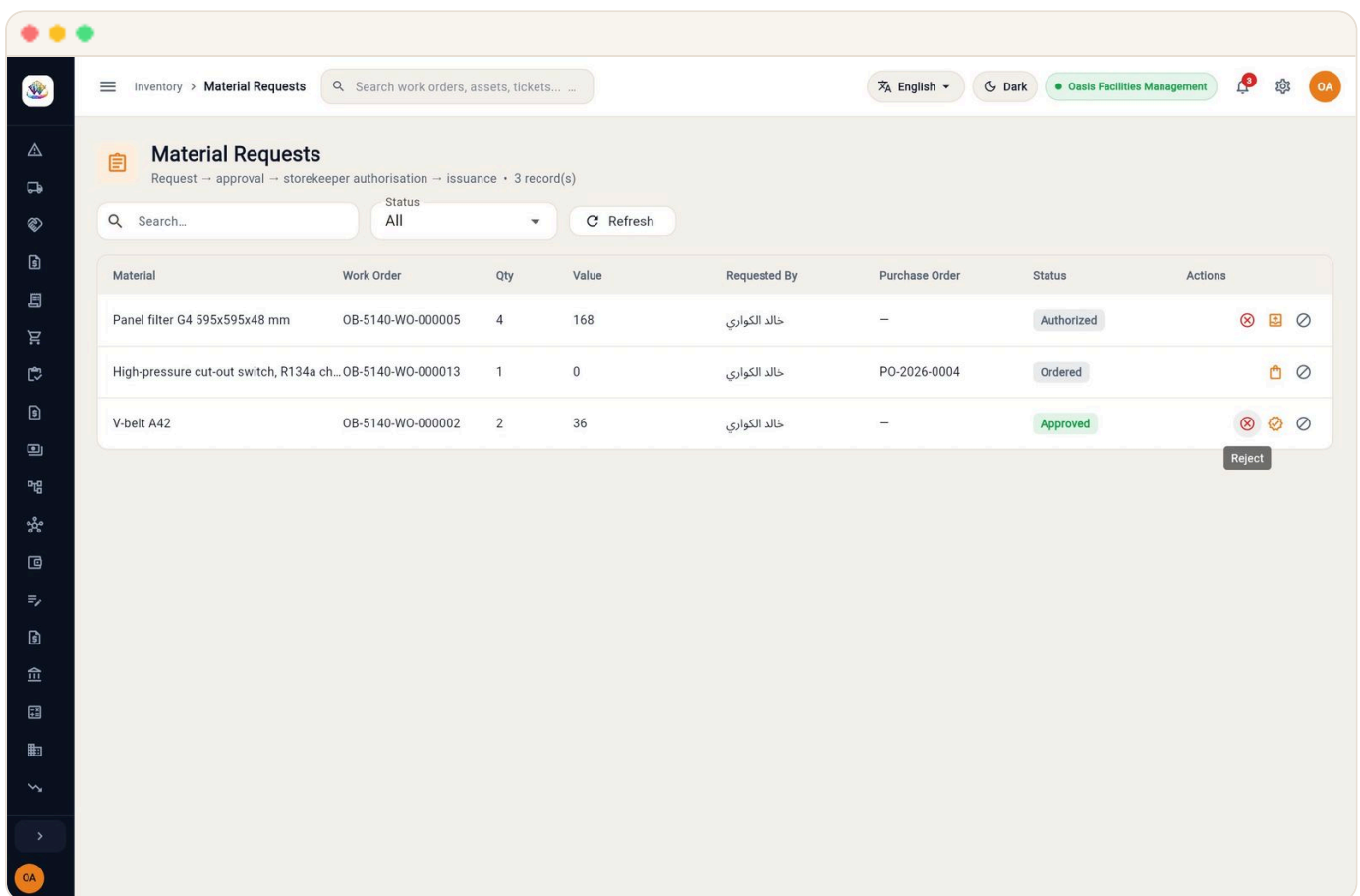
Material requests from work orders

Who: Supervisor (approves up to QAR 5,000), FM Manager and FM Administrator (no limit); the storekeeper authorises and issues

Where: Sidebar → INVENTORY → **Material Requests**

Technicians ask for parts from the **Parts** tab of a work order in the technician app (see the technician app part). The request lands here, where it is approved, authorised by the storekeeper and issued. If the stores hold the part, it is issued from stock; if not, a purchase order is raised automatically.

- 1 Open **Material Requests**. Each row shows the material, the work order, the quantity, its value, who asked, any linked purchase order and the status.
- 2 On a **Requested** row, click the tick icon (**Approve**). The stock is reserved for the job.
- 3 On the **Approved** row, click **Authorise**.
- 4 On the **Authorized** row, click **Issue**. The part leaves stock and is charged to the work order.



Material	Work Order	Qty	Value	Requested By	Purchase Order	Status	Actions
Panel filter G4 595x595x48 mm	OB-5140-WO-000005	4	168	خالد الكواري	—	Authorized	  
High-pressure cut-out switch, R134a ch...	OB-5140-WO-000013	1	0	خالد الكواري	PO-2026-0004	Ordered	 
V-belt A42	OB-5140-WO-000002	2	36	خالد الكواري	—	Approved	  

Figure 122 Material requests: filters authorised and ready to issue, a chiller switch on order, V-belts approved

Khalid asked for four G4 filters on OB-5140-WO-000005. When the storekeeper issues them, CAFM Way takes them from Khalid's van (the van of the assigned technician comes first, then a site store at the job's location, then the main store) and posts issue document SE-2026-00006. The work order shows the part at the van's average cost:

CAFWayFacilities

Oasis Facilities Management

Inventory

Items

Warehouses

Material Requests

Stock Movements

Stock Documents

Stock Counts

Stock Valuation

Replenishment

Task Kits

Units of Measure

HEALTH & SAFETY

USERS

WORKPLACE

SYSTEM

Reports

Approvals

Collapse

OA Omar Al-MansouriFm Admin

Work Orders > Work Orders

Search work orders, asset...

English

Dark

Oasis Facilities Management

3

OA

Work Orders / OB-5140-WO-000005

Work Order Detail

Replace fan coil filters, Tower A floor 2 reception

OB-5140-WO-000005 low assigned reactive

Replace fan coil filters, Tower A floor 2 reception

Reception Created: 2026-09-26 SLA: -- Asset: ...

SLA data pending

Reassign Escalate Request Parts Add Attachment Close WO

SLA Timer pending

Details Before & After Timeline Parts & Costs

Labour

Estimated Hours Actual Hours Technician

0.00 h خالد الكواري

Parts & Materials

+ Request Part

PART NAME	QTY	UNIT COST	TOTAL
Panel filter G4 595x595x48 mm (FLT-G4-595)	4	QAR 42.00	QAR 168.00

Parts Items 1 Parts Total QAR 168.00

Figure 123 The work order's Parts & Costs tab: four filters at QAR 42.00, QAR 168.00 in total

When the technician asks for a part that is not in stock, the request is marked **Ordered** and a purchase order is raised for it. Click **Open Purchase Order** on the row to complete it: fill in the supplier on **Order Details** and the price on the line, then approve it as described in Purchase orders.

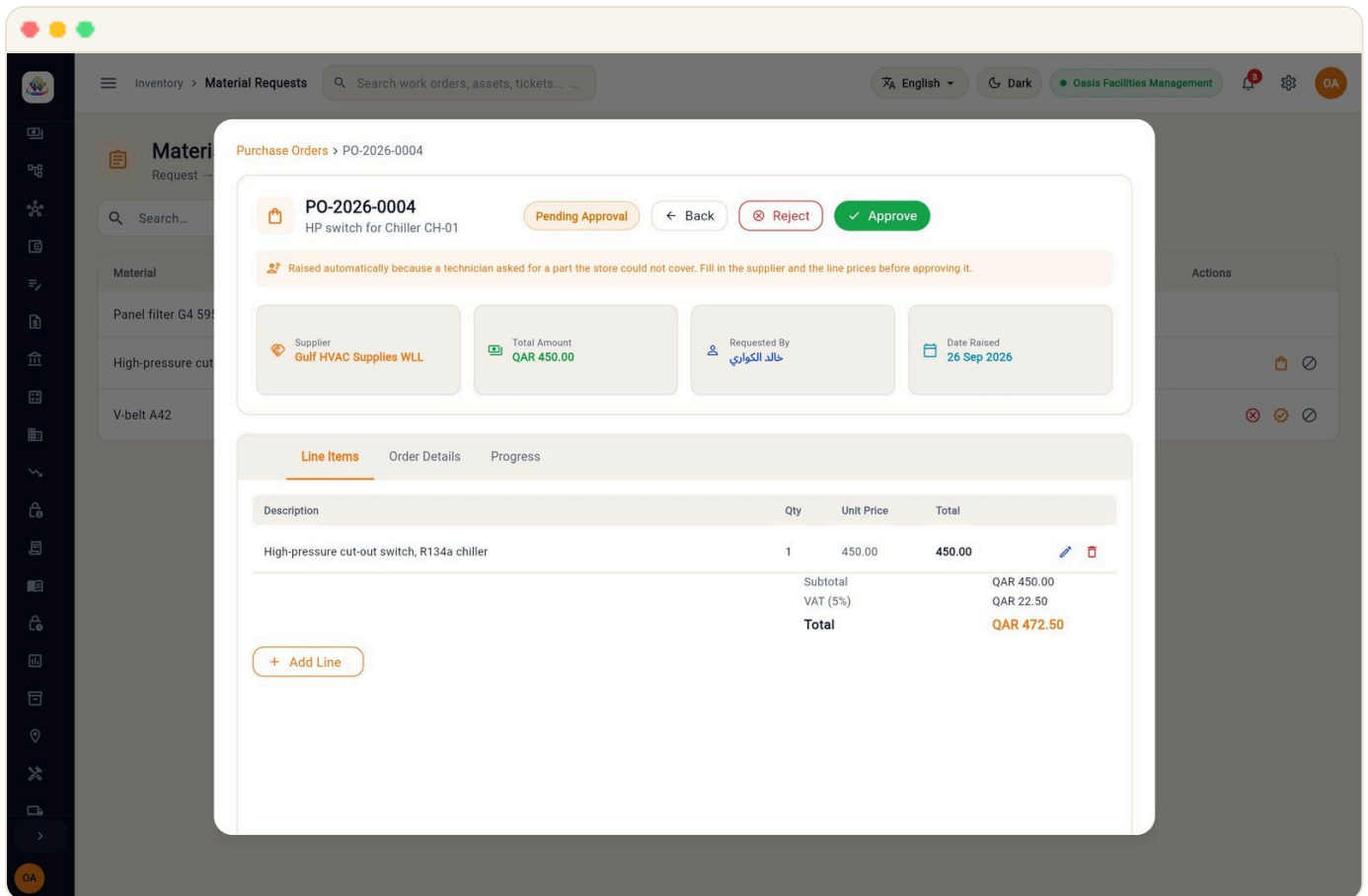


Figure 124 The purchase order raised automatically for a high-pressure switch, with supplier and price filled in

BUSINESS RULE

Approving or rejecting needs an approval limit at least equal to the request's value. Each step must follow the previous one: you cannot issue a request that has not been authorised. **Reject** and **Cancel** release any reserved stock. An issued request cannot be cancelled.

BUSINESS RULE

An issue needs enough stock in the chosen warehouse. The issue is posted to the ledger as materials consumed on the work order (see Accounting).

NOTE

Material requests are raised from the technician app. The **Request Part** button on the web work-order page is not available yet.

Request for quotation

Who: FM Administrator, FM Manager, Procurement Officer

Where: Sidebar → PURCHASES → **Request for Quotation**

An RFQ asks several suppliers to price the same list of items.

- 1 Click **New RFQ**.
- 2 Enter the **Subject** and the **Required by (YYYY-MM-DD)** date.
- 3 Under ITEMS enter each line's **Item name**, **Code**, **Qty** and **UOM**. Click **Add line** for more lines.
- 4 Under ASK THESE SUPPLIERS click each supplier you want to invite.
- 5 Enter a **Message for suppliers** and the **Terms**.
- 6 Click **Create RFQ**. The RFQ is saved as a draft.

The screenshot shows the 'New request for quotation' form in the CAFMWay web application. The form is titled 'New request for quotation' and has a close button (X) in the top right corner. It contains the following sections:

- Subject:** Q4 HVAC consumables for the PPM programme
- Required by (YYYY-MM-DD):** 2026-10-10
- ITEMS:** A table with 4 columns: Item name, Code, Qty, and UOM. It contains 3 rows of items:

Item name	Code	Qty	UOM
Panel filter G4 595x595x48 mm	FLT-G4-595	96	Piece
Run capacitor 35+5 uF 440 V	CAP-35-5	20	Piece
V-belt A42	VB-T-A42	24	Piece
- ASK THESE SUPPLIERS (3 selected):** A section with 3 selected suppliers: Doha Electrical Trading Co., Gulf HVAC Supplies WLL, and Qatar Lighting Solutions.
- Message for suppliers:** Please quote your best unit price, delivered to our Main Store in the Industrial Area, and state the delivery lead time.
- Terms:** Prices in QAR excluding VAT. Quotation valid for at least 30 days. Delivery within 10 days of the purchase order.
- Buttons:** Cancel and Create RFQ (highlighted in orange).

Figure 125 A new RFQ for 96 filters, 20 capacitors and 24 V-belts, sent to three suppliers

- 1 On the draft row, click the paper-plane icon (**Send to suppliers**). The status becomes **Submitted**.

Request for Quotation
3 total · 1 out with suppliers

Search RFQ number or subject...

RFQ	DATE	REQUIRED BY	SUBJECT	ITEMS	SUPPLIERS	RESPONSES	STATUS		
RFQ-2026-0003	2026-09-26	2026-10-12	Q4 PPM - AHU filters, capacitors a...	3	3	0 / 3	Cancelled		
RFQ-2026-0002	2026-09-26	2026-10-20	LED panels for the West Bay Tower...	1	2	0 / 2	Draft		
RFQ-2026-0001	2026-09-26	2026-10-10	Q4 HVAC consumables for the PP...	3	3	3 / 3	Submitted		

Figure 126 The RFQ list: one submitted with 3 of 3 replies, one draft and one cancelled

BUSINESS RULE

An RFQ needs at least one item, and at least one supplier before it can be sent. A cancelled RFQ cannot be edited. An RFQ that already has quotations cannot be deleted.

NOTE

Send to suppliers records that the RFQ has gone out; it does not email the suppliers. Send them the RFQ yourself and key their replies in as quotations.

Supplier quotations and award

Who: FM Administrator, FM Manager, Procurement Officer

Where: Sidebar → PURCHASES → **Request for Quotation** and **Supplier Quotation**

Record each supplier's reply against the RFQ, compare them and award the order.

- 1 On the submitted RFQ, click the green icon (**Record a supplier's quote**).
- 2 In **Which supplier is quoting?** choose a supplier marked **Awaiting their quote**.

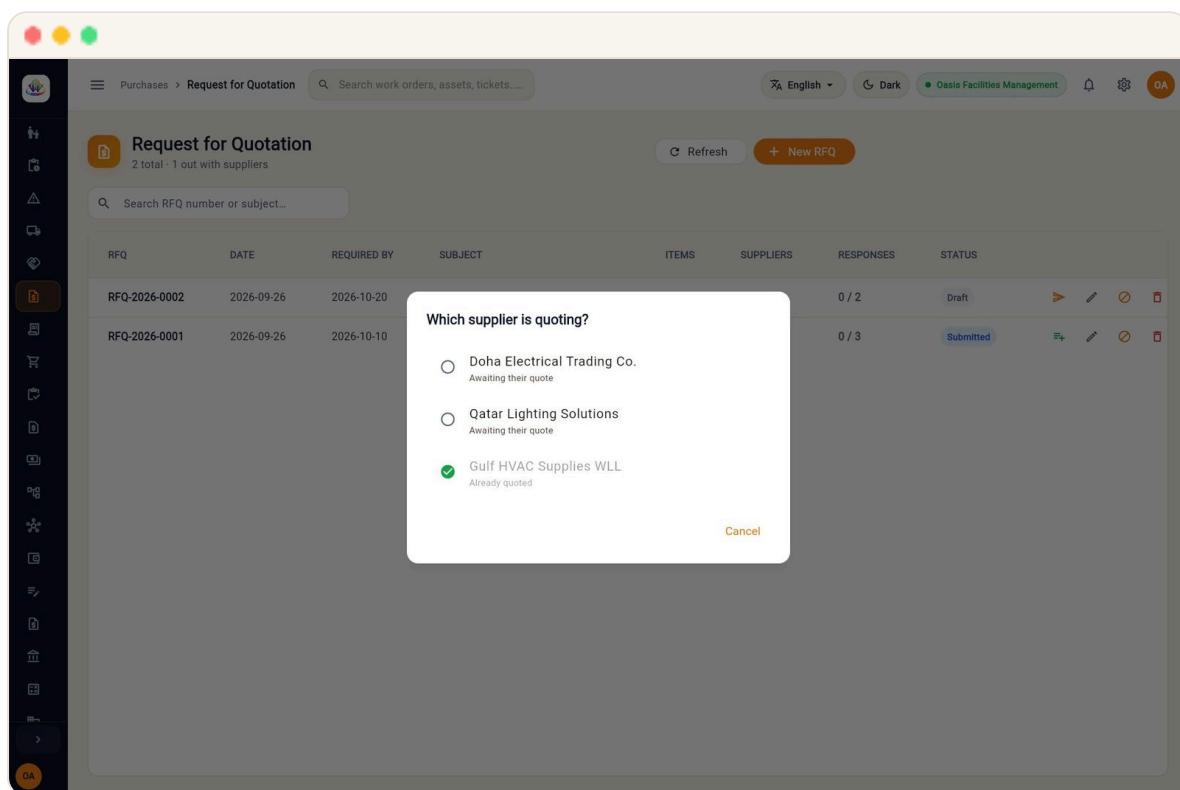


Figure 127 Choosing which supplier is quoting; Gulf HVAC has already quoted

- 3 The RFQ lines are copied into the quotation. Enter the **Supplier quote no.**, **Quotation date**, **Valid till** date, the **Rate** on each line and the **Payment terms**. The totals are worked out as you type.
- 4 Click **Save changes**.

New quotation

Supplier *
Doha Electrical Trading Co.

Supplier quote no.
DET-2026-0418

Quotation date (YYYY-MM-DD)
2026-09-27

Valid till (YYYY-MM-DD)
2026-10-27

Currency
QAR

ITEMS

Item name	Code	Qty	UOM	Rate	
anel filter G4 595x595x48 mm	FLT-G4-595	96	Piece	44	4224.00 ×
Run capacitor 35+5 uF 440 V	CAP-35-5	20	Piece	33	660.00 ×
V-belt A42	VB-T-A42	24	Piece	19	456.00 ×

Net total 5340.00 QAR

Net total 5340.00 QAR

Tax / VAT 0

Grand total 5340.00 QAR

Payment terms
Net 30

Terms
Prices in QAR excluding VAT. Delivery within 7 days of the purchase order.

Cancel Create

Figure 128 Doha Electrical's quotation: 44, 33 and 19 QAR per unit, QAR 5,340.00 in total

- 1 Repeat for each supplier. In **Supplier Quotation**, click **Submit** on each quotation once it is final.
- 2 Compare the grand totals in the list. On the winning quotation, click the cart icon (**Award and raise a purchase order**). The quotation becomes **Ordered**, the other quotations on the same RFQ become **Lost**, and a purchase order is created with the quotation's lines and prices.

Supplier Quotation
2 received · 1 converted to orders

Search quotation or supplier reference...

QUOTATION	SUPPLIER	AGAINST RFQ	THEIR REF	DATE	VALID TILL	ITEMS	GRAND TOTAL	STATUS
SQ-2026-0003	Qatar Lighting Solutions	RFQ-2026-0001	QLS-771	2026-09-27	2026-09-30	3	5700.00 QAR	Lost
SQ-2026-0002	Doha Electrical Trading Co.	RFQ-2026-0001	DET-2026-0418	2026-09-27	2026-10-27	3	5340.00 QAR	Ordered

Figure 129 Supplier quotations after the award: Doha Electrical ordered, Qatar Lighting lost

BUSINESS RULE

Only invited suppliers can quote on an RFQ, once each. An ordered quotation cannot be changed. A quotation past its **Valid till** date is shown as expired.

CAUTION

The row icons do not ask for confirmation, and **Delete** removes the quotation at once. Check which row you are on before you click.

Purchase orders

Who: Procurement Officer raises and may approve up to QAR 50,000; FM Manager, FM Administrator and Finance Officer approve without limit

Where: Sidebar → PURCHASES → **Purchase Order**

A purchase order is born in one of three ways: by awarding a quotation, automatically from a material request the store could not cover, or directly with **New Purchase Order**.

Raise a purchase order directly

- 1 Click **New Purchase Order**.
- 2 Enter the **Supplier**, a **Description** of what is being bought and the **Net amount**.
- 3 Click **Raise order**. The order is created as **Pending Approval**.

Figure 130 A direct purchase order for 60 LED panels from Qatar Lighting Solutions

- 1 Click **View** on the new order and, on **Line Items**, click the pencil icon (**Edit line**) to set the description, quantity and unit price. The total is recalculated.

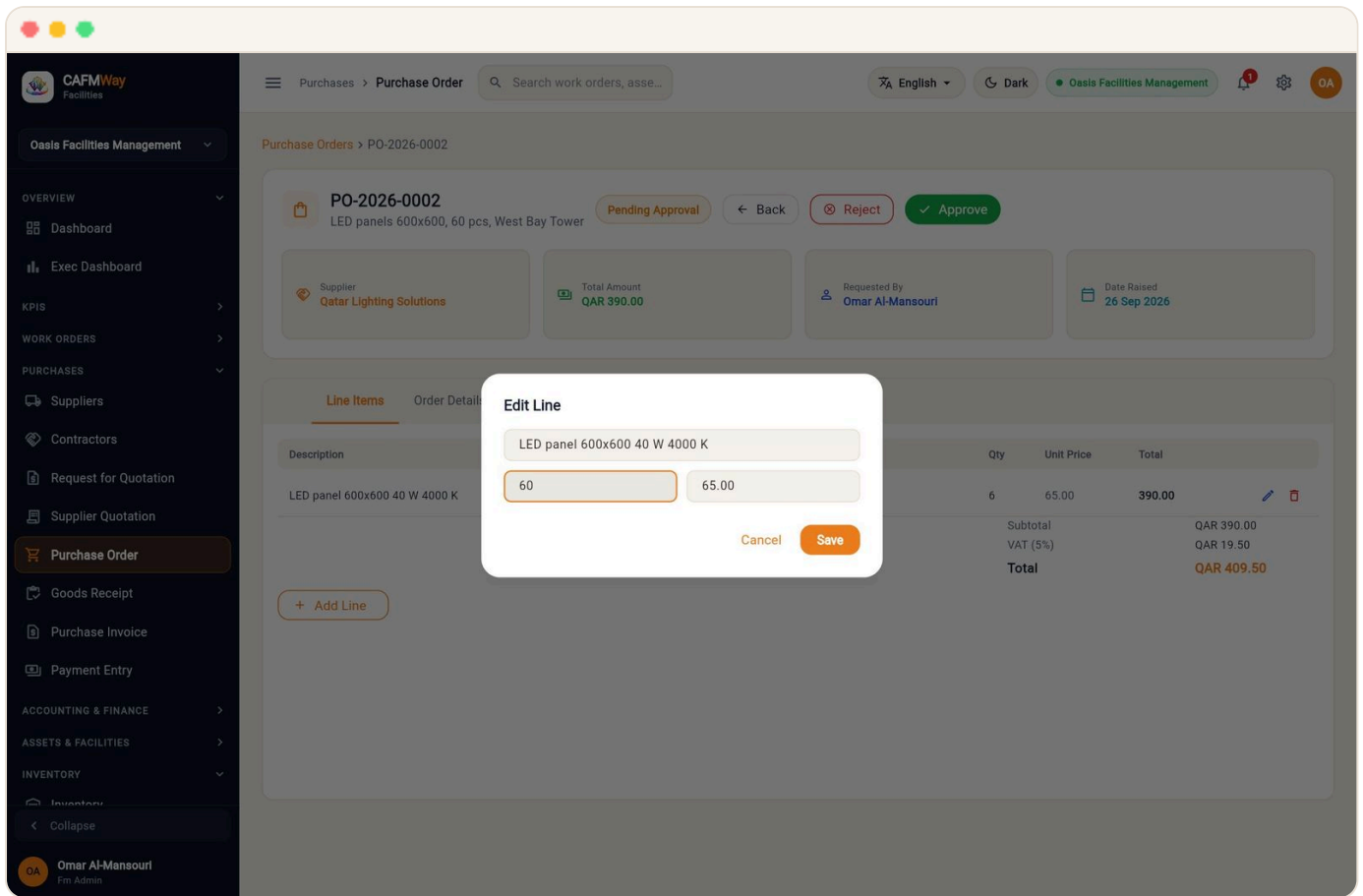


Figure 131 Editing the order line: 60 LED panels at QAR 65.00

Review and approve

- 1 Click **View** on the order. **Line Items** lists the lines; **Order Details** holds the supplier, title, notes, payment terms and terms and conditions (click **Save Changes** after editing them); **Progress** shows who raised, approved and ordered it.

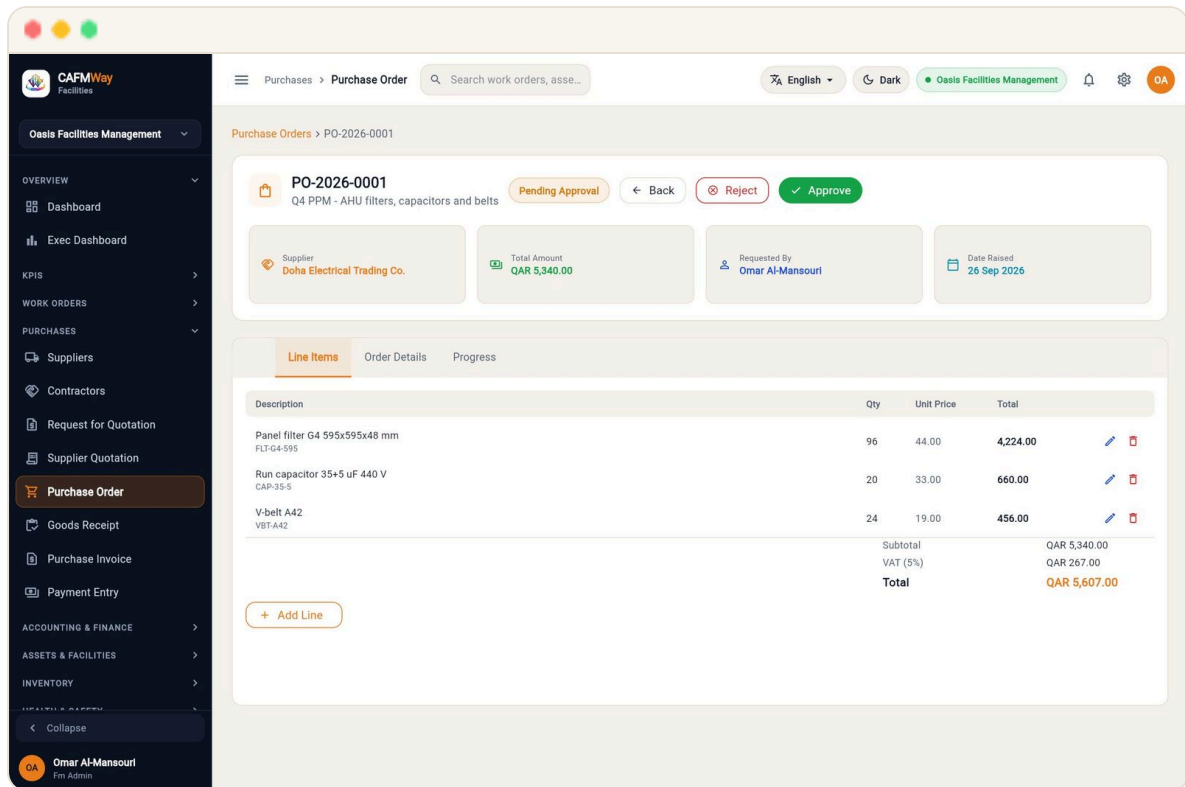


Figure 132 PO-2026-0001 from Doha Electrical, raised from quotation SQ-2026-0002, pending approval

- 2 Click **Approve** and confirm. The order can no longer be edited.

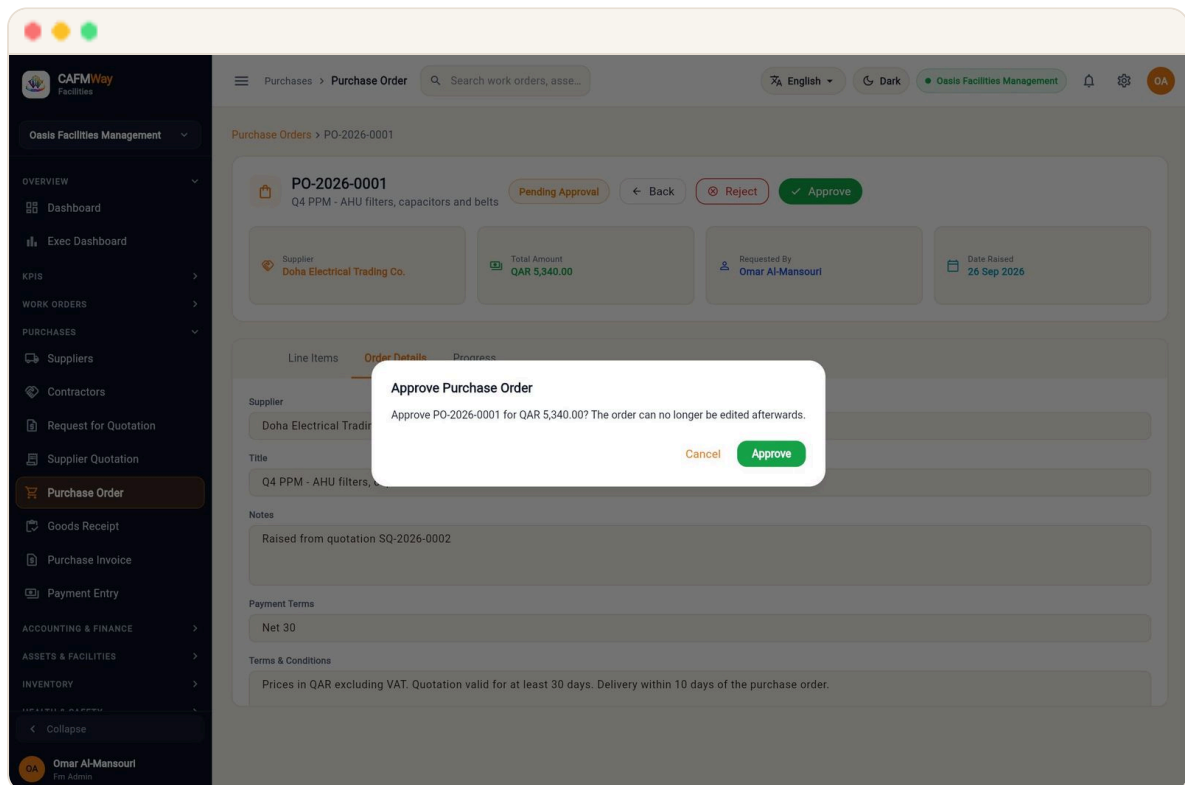


Figure 133 Confirming approval of PO-2026-0001 for QAR 5,340.00

- 3 To refuse an order instead, click **Reject** and confirm. The order is cancelled.

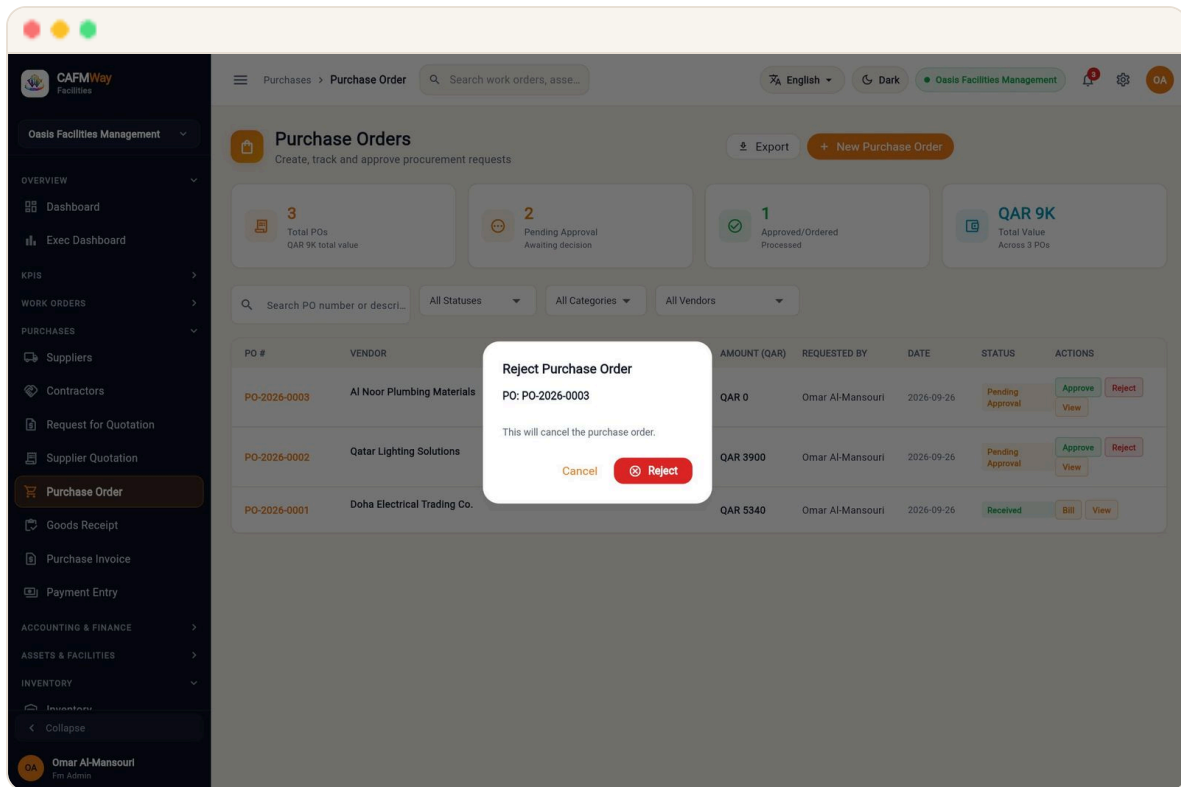


Figure 134 Rejecting a purchase order cancels it

BUSINESS RULE

An order needs at least one line and a unit price on every line before it can be approved. Your approval limit must cover the order total; above it, the approval button refuses with a message and a higher approver must sign.

NOTE

Your company can require a named approver for purchase orders above an amount in **Settings → Approvals (Purchase order — issuing)**. The approver then signs the request in **Approvals** before the order moves on. This applies to orders raised with **New Purchase Order**.

Send it and receive it

- 1 Once the order has been sent to the supplier, click **Mark Ordered** and then **Confirm Ordered**.

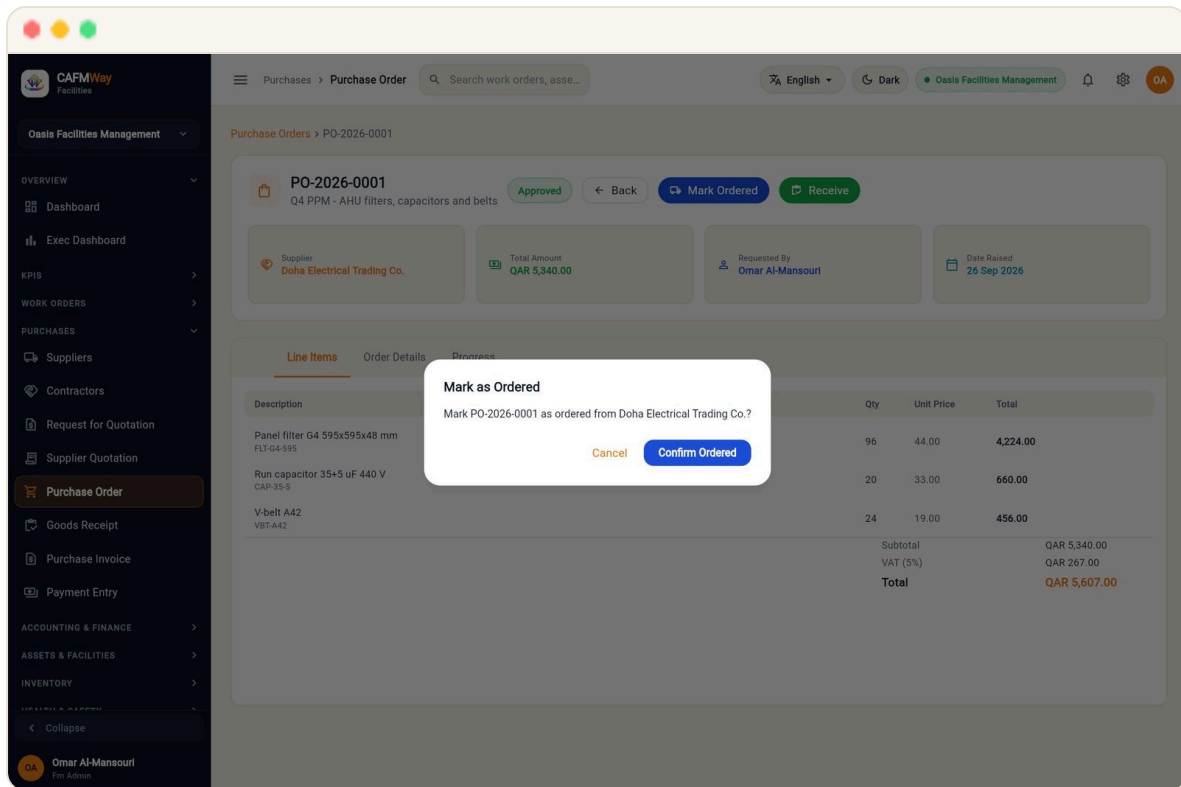


Figure 135 Marking PO-2026-0001 as ordered from Doha Electrical

2

When the goods arrive, first post the goods receipt into the warehouse (next section). Then click **Receive** on the order and confirm. The order becomes **Received** and **Progress** is complete.

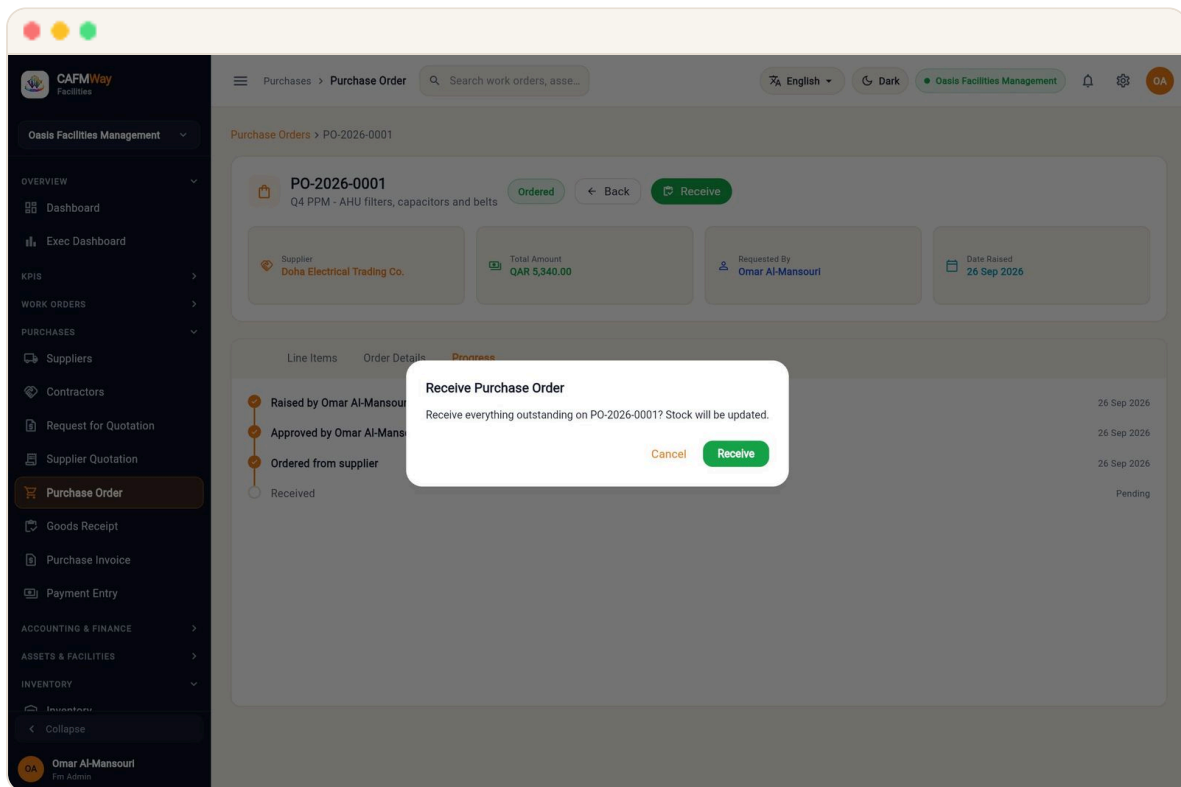


Figure 136 Receiving everything outstanding on PO-2026-0001

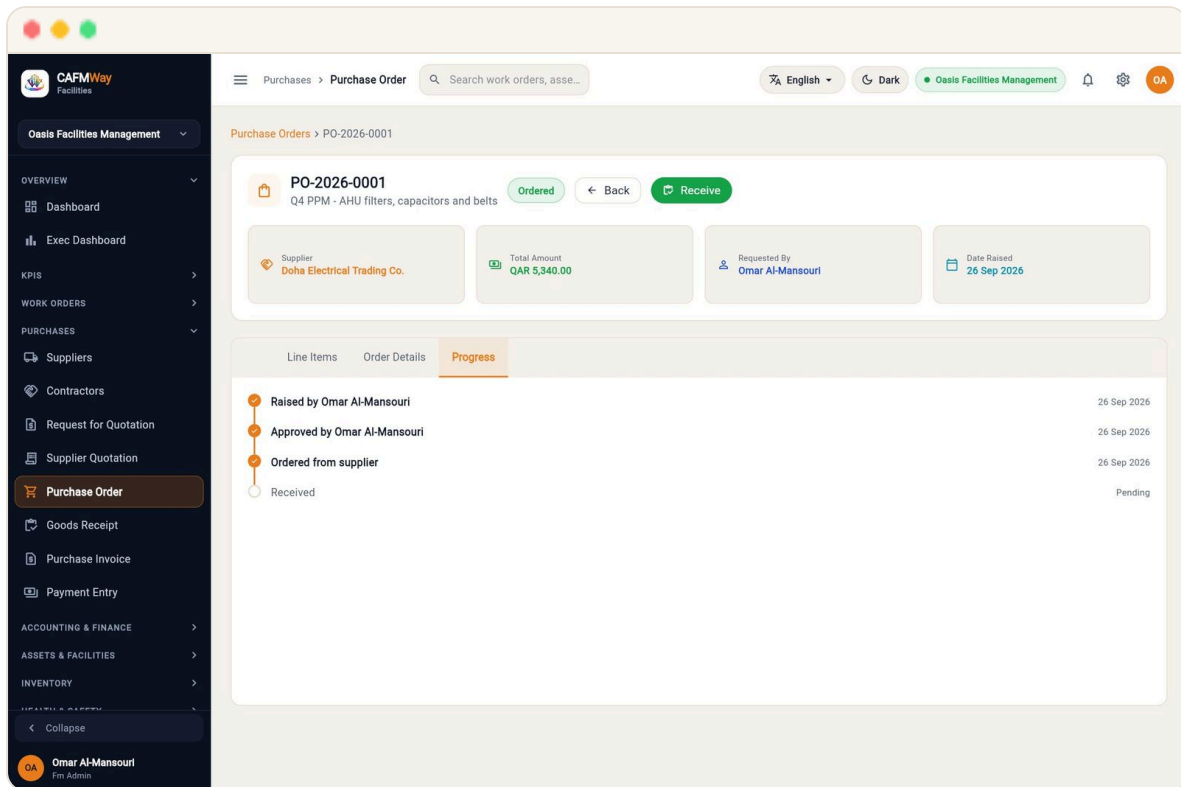


Figure 137 The order's progress: raised, approved, ordered, received

3

Click **Bill** on the order row. A draft purchase invoice is created for what is ordered and not yet billed, and a message gives its number.

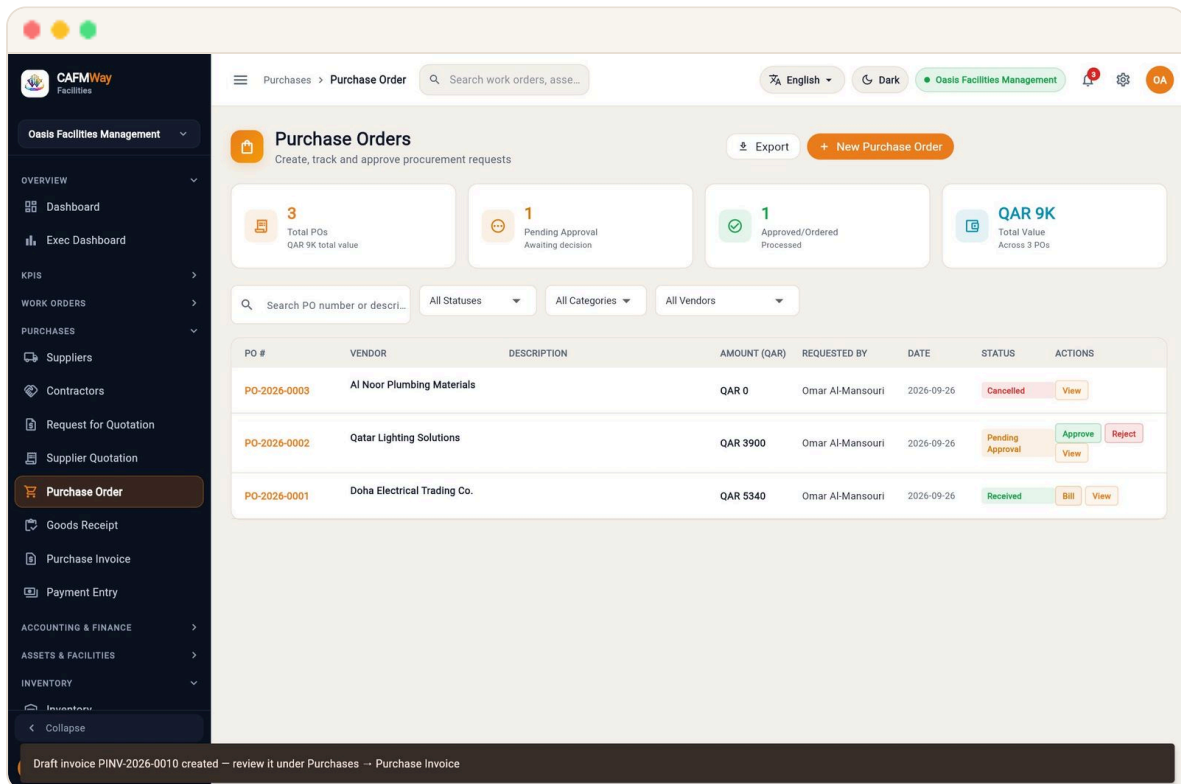


Figure 138 Draft invoice PINV-2026-0010 created from the purchase order

The list's cards count the orders by stage and total their value.

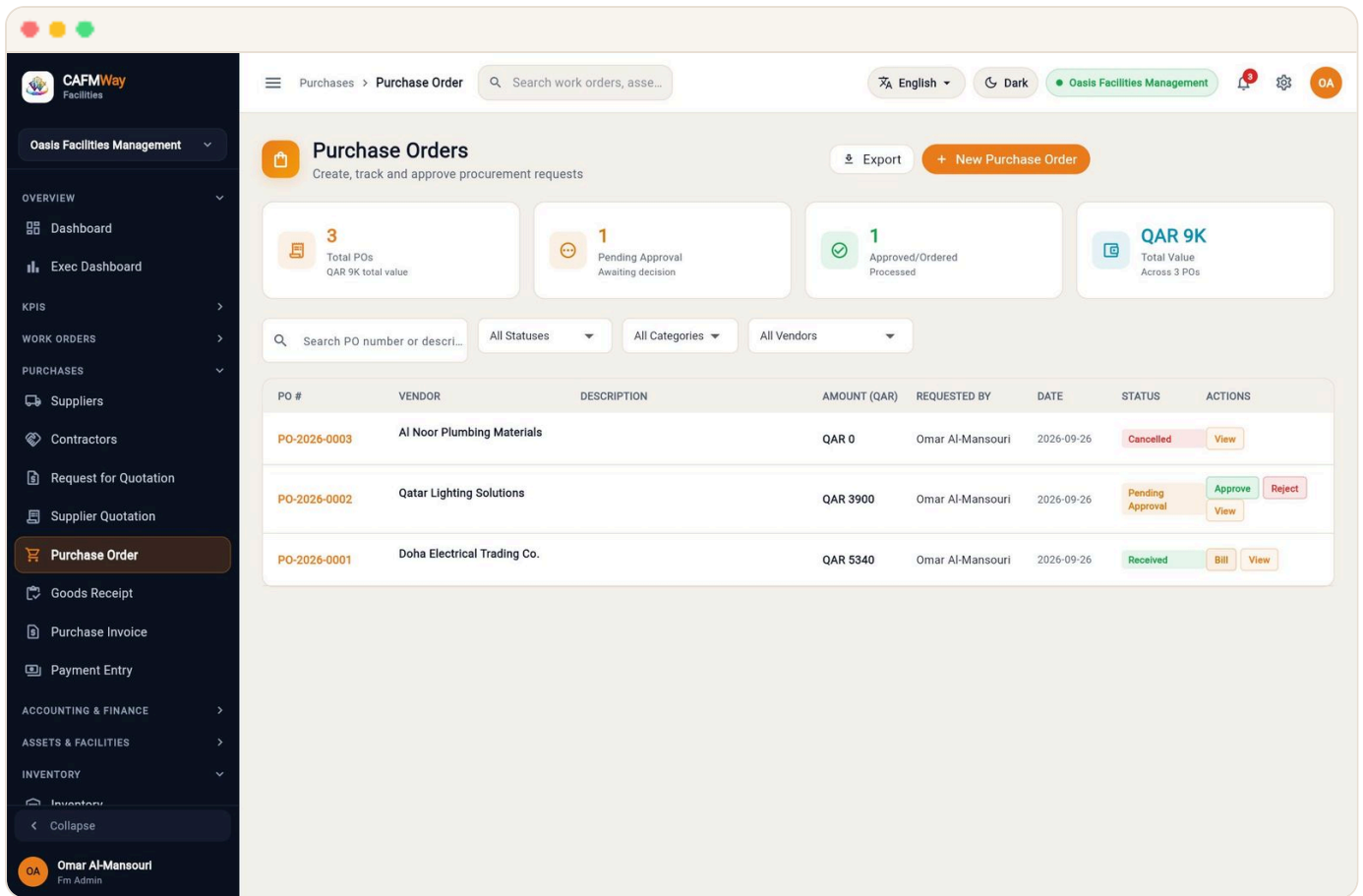


Figure 139 Purchase orders: one received, one pending approval, one cancelled

CAUTION

Receive on a purchase order closes the order; it does not put stock into a warehouse. Always post the goods receipt as well, or the stock will not appear in any store.

Goods receipt

Who: FM Administrator, FM Manager, Procurement Officer

Where: Sidebar → PURCHASES → **Goods Receipt** (the same page as INVENTORY → **Stock Documents**)

A goods receipt puts delivered goods into a warehouse at the price paid.

- 1 Click **New document**. **What happened** is already set to **Receipt — a delivery arrived**.
- 2 Set **To** to the receiving warehouse.
- 3 Click **Add a line** for each item delivered, and enter the **Qty** and the **Rate** (what was paid per unit, from the purchase order).
- 4 In **Remarks (optional)** enter the purchase order and delivery note numbers, for example
PO-2026-0001 - Doha Electrical delivery note DN-55812 .
- 5 Keep **Post it now** ticked and click **Post**. Untick it and click **Save draft** instead if someone else should check the receipt before it is posted.

The screenshot shows the CAFMWay web application interface. The left sidebar contains navigation menus for Overview, KPIS, Work Orders, Purchases, Suppliers, Contractors, Request for Quotation, Supplier Quotation, Purchase Order, Goods Receipt (highlighted), Purchase Invoice, Payment Entry, Accounting & Finance, Assets & Facilities, and Inventory. The main content area displays the 'Stock Documents' page with a 'New document' button. A modal window titled 'New stock document' is open, showing the following fields:

- What happened:** Receipt — a delivery arrived
- To:** Main Store - Industrial Area
- Lines:** A table with three rows of items:

Item	Qty	Rate
FLT-G4-595 — Panel filter G4 595x595x4...	96	44
CAP-35-5 — Run capacitor 35+5 uF 440 V	20	33
VBTA42 — V-belt A42	24	19
- Remarks (optional):** PO-2026-0001 - Doha Electrical delivery note DN-55812
- Post it now:** Ticked checkbox
- Buttons:** Cancel, Post

Figure 140 Receiving 96 filters, 20 capacitors and 24 V-belts into the main store

Click the receipt in the list to see what it wrote to the stock ledger. Each line shows the quantity added, the new average cost, the quantity after the receipt and the value:

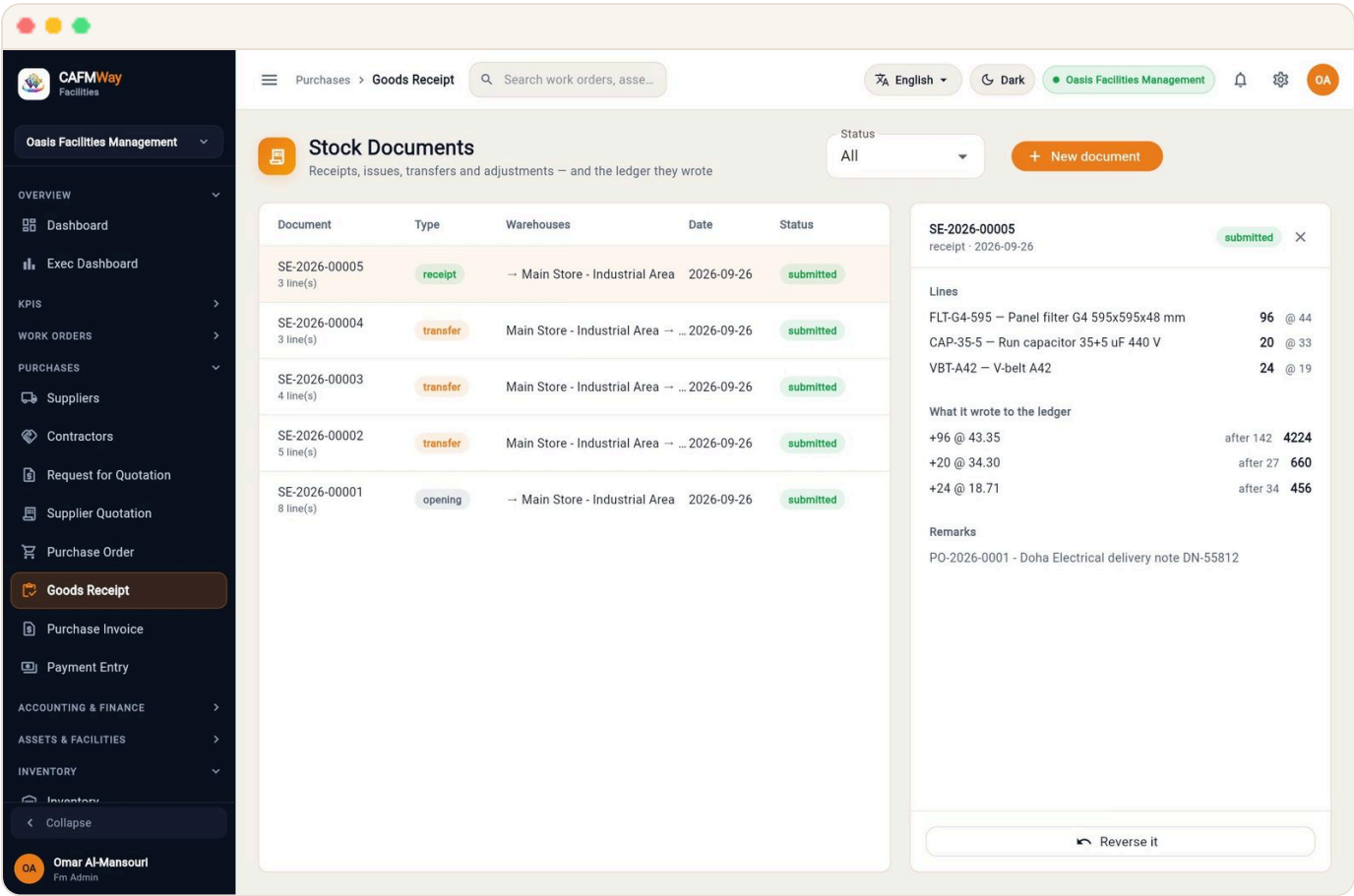


Figure 141 Receipt SE-2026-00005: the filters' average moved from 42.00 to 43.35

EXAMPLE

The main store held 46 filters at QAR 42.00 (QAR 1,932). Receiving 96 at QAR 44.00 (QAR 4,224) gives 142 filters worth QAR 6,156, an average of QAR 43.35.

BUSINESS RULE

A receipt needs a destination warehouse, at least one line and a rate on every line. It posts to the ledger as inventory against goods received not invoiced (see Accounting).

Purchase invoice

Who: FM Administrator, FM Manager, Finance Officer

Where: Sidebar → PURCHASES → **Purchase Invoice**

When the supplier's invoice arrives, complete the draft created by **Bill** and approve it.

- 1 Find the invoice (PINV-2026-0010, **Against PO PO-2026-0001**) and click the pencil icon.
- 2 Enter the **Supplier bill no.**, **Bill date (YYYY-MM-DD)** and **Due date (YYYY-MM-DD)**. Check the lines and rates against the paper invoice and add any **Tax / VAT**.
- 3 Click **Save changes**.

Edit purchase invoice

Supplier *
Doha Electrical Trading Co.

Supplier bill no.
DET-INV-30512

Bill date (YYYY-MM-DD)
2026-09-26

Due date (YYYY-MM-DD)
2026-10-26

Currency
QAR

ITEMS

Item name	Code	Qty	UOM	Rate	
Panel filter G4 595x595x48 mr	FLT-G4-595	96	Piece	44	4224.00 ×
Run capacitor 35+5 uF 440 V	CAP-35-5	20	Piece	33	660.00 ×
V-belt A42	VB-T-A42	24	Piece	19	456.00 ×

Net total 5340.00 QAR

Net total 5340.00 QAR

Tax / VAT 0

Grand total 5340.00 QAR

Payment terms
Net 30

Notes
Supplier invoice for PO-2026-0001, goods received on SE-2026-00005.

Cancel Save changes

Figure 142 The purchase invoice from Doha Electrical with bill number DET-INV-30512

- 1 Click the approve icon on the row. The invoice becomes **Approved** and is posted to accounts payable (see Accounting).

Purchase Invoice
10 invoices · 5340.00 outstanding

Search invoice, supplier bill no. or vend... Outstanding only

INVOICE	SUPPLIER	BILL NO.	AGAINST PO	BILL DATE	DUE	GRAND TOTAL	OUTSTANDING	STATUS
PINV-2026-0010	Doha Electrical Trading Co.	DET-INV-30512	PO-2026-0001	2026-09-26	2026-10-26	5340.00 QAR	5340.00	Pending
PINV-2026-0009	Gulf HVAC Supplies WLL	GHV-INV-7741	—	2026-09-20	2026-10-20	4800.00 QAR	0.00	Paid
INV-2026-0006	Doha Electrical Co.	—	—	—	2026-08-22	0.00 QAR	0.00	Paid
INV-2026-0005	Gulf HVAC Supplies	—	—	—	2026-07-03	0.00 QAR	0.00	Pending
INV-2026-0004	Al Rayyan Trading	—	—	—	2026-08-16	0.00 QAR	0.00	Paid
INV-2026-0008	Al Rayyan Trading	—	—	—	2026-09-17	0.00 QAR	0.00	Pending
INV-2026-0002	Doha Electrical Co.	—	—	—	2026-09-20	0.00 QAR	0.00	Approved
INV-2026-0007	Qatar Facility Services	—	—	—	2026-07-16	0.00 QAR	0.00	Approved
INV-2026-0003	Qatar Facility Services	—	—	—	2026-10-15	0.00 QAR	0.00	Pending
INV-2026-0001	Gulf HVAC Supplies	—	—	—	2026-07-24	0.00 QAR	0.00	Paid

Figure 143 Purchase invoices, with PINV-2026-0010 outstanding for QAR 5,340.00

TIP

Outstanding only hides invoices that are fully paid. **New invoice** records a bill that has no purchase order behind it, such as a service charge.

Payment entry

Who: FM Administrator, FM Manager, Finance Officer

Where: Sidebar → PURCHASES → **Purchase Invoice** and **Payment Entry**

- 1 On the approved invoice, click the money icon (**Pay this invoice**). A draft payment is created for the outstanding amount.
- 2 Open **Payment Entry** and click the pencil icon on the draft.
- 3 Enter the **Mode of payment**, **Bank account**, **Cheque / transfer no.** and **Reference date** (YYYY-MM-DD). Check the allocation under **ALLOCATE ACROSS OPEN INVOICES**; **Allocate oldest first** spreads the amount over the supplier's oldest invoices.
- 4 Click **Save changes**.

Edit payment entry

Supplier * Doha Electrical Trading Co. Amount paid * 5340 Currency QAR

Posting date (YYYY-MM-DD) 2026-09-26 Mode of payment Bank transfer Bank account Main Bank Account - QAR

Cheque / transfer no. QNB-TRF-884120 Reference date (YYYY-MM-DD) 2026-09-26

ALLOCATE ACROSS OPEN INVOICES Allocate oldest first

PINV-2026-0010
DET-INV-30512 - due 2026-10-26

Paid	Allocated	Unallocated
5340.00 QAR	5340.00 QAR	0.00 QAR

Outstanding 5340.00 Allocate 5340

Remarks
Payment of Doha Electrical invoice DET-INV-30512 (PO-2026-0001)

Cancel Save changes

Figure 144 The payment of QAR 5,340.00 by bank transfer, allocated to PINV-2026-0010

- 1 Click **Post payment** on the row. The payment becomes **Submitted**, the invoice becomes **Paid**, and the bank payment is posted (see Accounting).

Payment Entry
2 entries · 10140.00 paid

Search payment or reference number...

PAYMENT	SUPPLIER	DATE	MODE	REFERENCE	PAID	ALLOCATED	UNALLOCATED	STATUS
PE-2026-0002	Doha Electrical Trading Co.	2026-09-26	Bank transfer	QNB-TRF-884120	5340.00 QAR	5340.00 (1)	—	Submitted
PE-2026-0001	Gulf HVAC Supplies WLL	2026-09-26	Bank transfer	TRF-2026-09-0418	4800.00 QAR	4800.00 (1)	—	Submitted

Figure 145 Payment entries: two submitted bank transfers

BUSINESS RULE

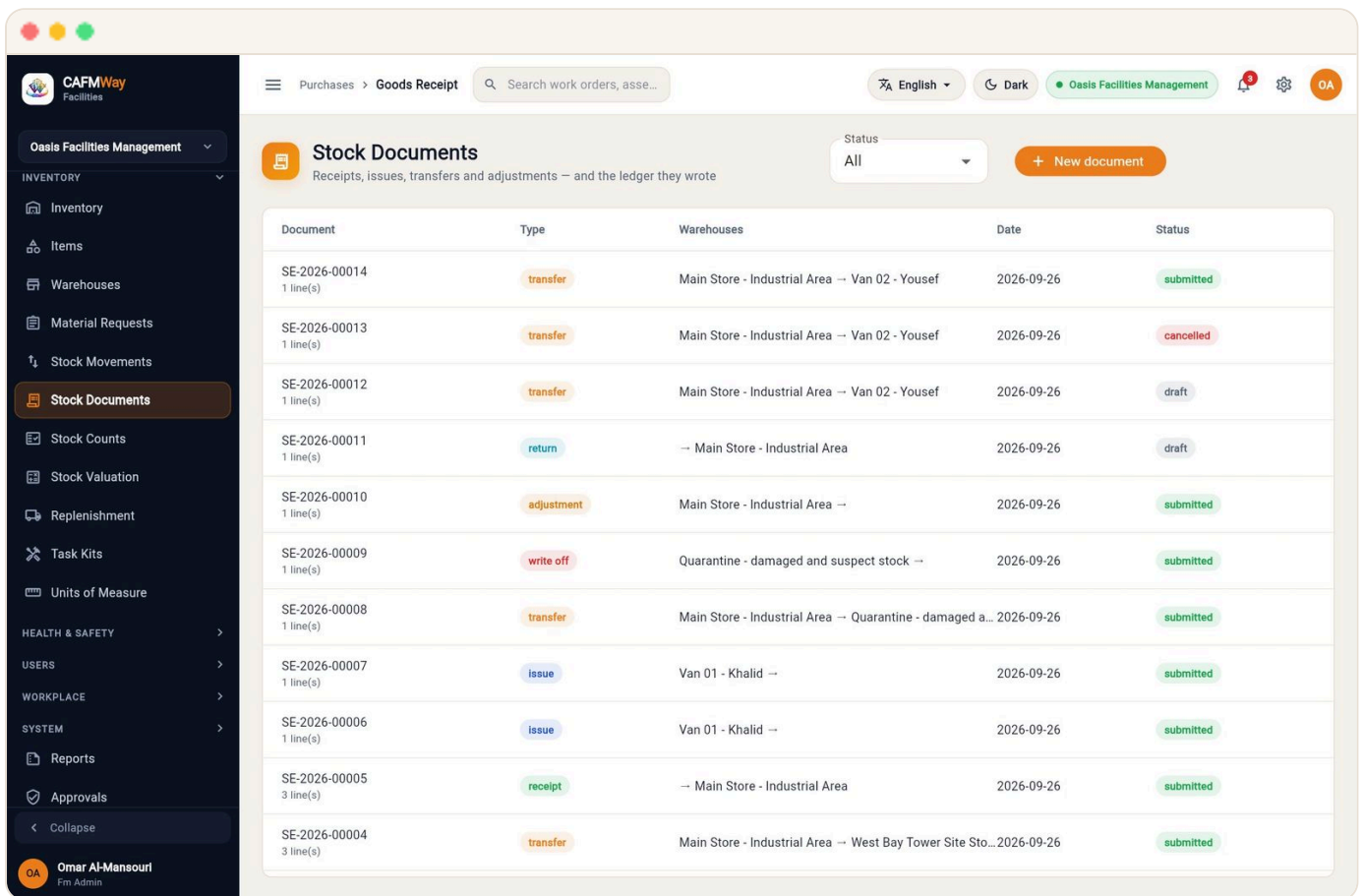
Only draft payments can be edited. **Cancel and restore the balances** puts the amount back on the invoices it settled.

Stock documents: transfers, adjustments, write-offs and reversals

Who: FM Administrator, FM Manager, Procurement Officer; Supervisor can view

Where: Sidebar → INVENTORY → **Stock Documents**

Every change in stock, apart from an issue to a work order, is recorded as a stock document. The list shows each document's type, the warehouses it moved stock between, its date and status.



The screenshot displays the CAFMWay web application interface. The left sidebar shows the navigation menu with 'Stock Documents' highlighted. The main content area is titled 'Stock Documents' and includes a search bar, a status filter dropdown set to 'All', and a '+ New document' button. Below this is a table listing various stock documents.

Document	Type	Warehouses	Date	Status
SE-2026-00014 1 line(s)	transfer	Main Store - Industrial Area → Van 02 - Yousef	2026-09-26	submitted
SE-2026-00013 1 line(s)	transfer	Main Store - Industrial Area → Van 02 - Yousef	2026-09-26	cancelled
SE-2026-00012 1 line(s)	transfer	Main Store - Industrial Area → Van 02 - Yousef	2026-09-26	draft
SE-2026-00011 1 line(s)	return	→ Main Store - Industrial Area	2026-09-26	draft
SE-2026-00010 1 line(s)	adjustment	Main Store - Industrial Area →	2026-09-26	submitted
SE-2026-00009 1 line(s)	write off	Quarantine - damaged and suspect stock →	2026-09-26	submitted
SE-2026-00008 1 line(s)	transfer	Main Store - Industrial Area → Quarantine - damaged a...	2026-09-26	submitted
SE-2026-00007 1 line(s)	issue	Van 01 - Khalid →	2026-09-26	submitted
SE-2026-00006 1 line(s)	issue	Van 01 - Khalid →	2026-09-26	submitted
SE-2026-00005 3 line(s)	receipt	→ Main Store - Industrial Area	2026-09-26	submitted
SE-2026-00004 3 line(s)	transfer	Main Store - Industrial Area → West Bay Tower Site Sto...	2026-09-26	submitted

Figure 146 Stock documents: opening, receipt, transfers, issues, a write-off, an adjustment, a draft and a reversal

What happened	Warehouses	Use it when
Receipt — a delivery arrived	To	Goods arrive from a supplier (see Goods receipt)
Transfer — stock moved between warehouses	From, To	You load a van or move stock to a site store
Adjustment — a count found a difference	From	A check finds more or less than recorded; enter a negative quantity for a shortfall
Write-off — stock was lost	From	Stock is damaged beyond use, lost or stolen
Opening — what was already there	To	You start using CAFM Way (see Opening stock)
Return — a part came back	To	An unused part comes back from a job; returns are recorded from the technician app, which knows the work order

Load a technician's van

- 1 Click **New document** and set **What happened** to **Transfer — stock moved between warehouses**.
- 2 Set **From** to **Main Store - Industrial Area** and **To** to the van.
- 3 Add the lines and quantities, enter **Remarks (optional)** and click **Post**.

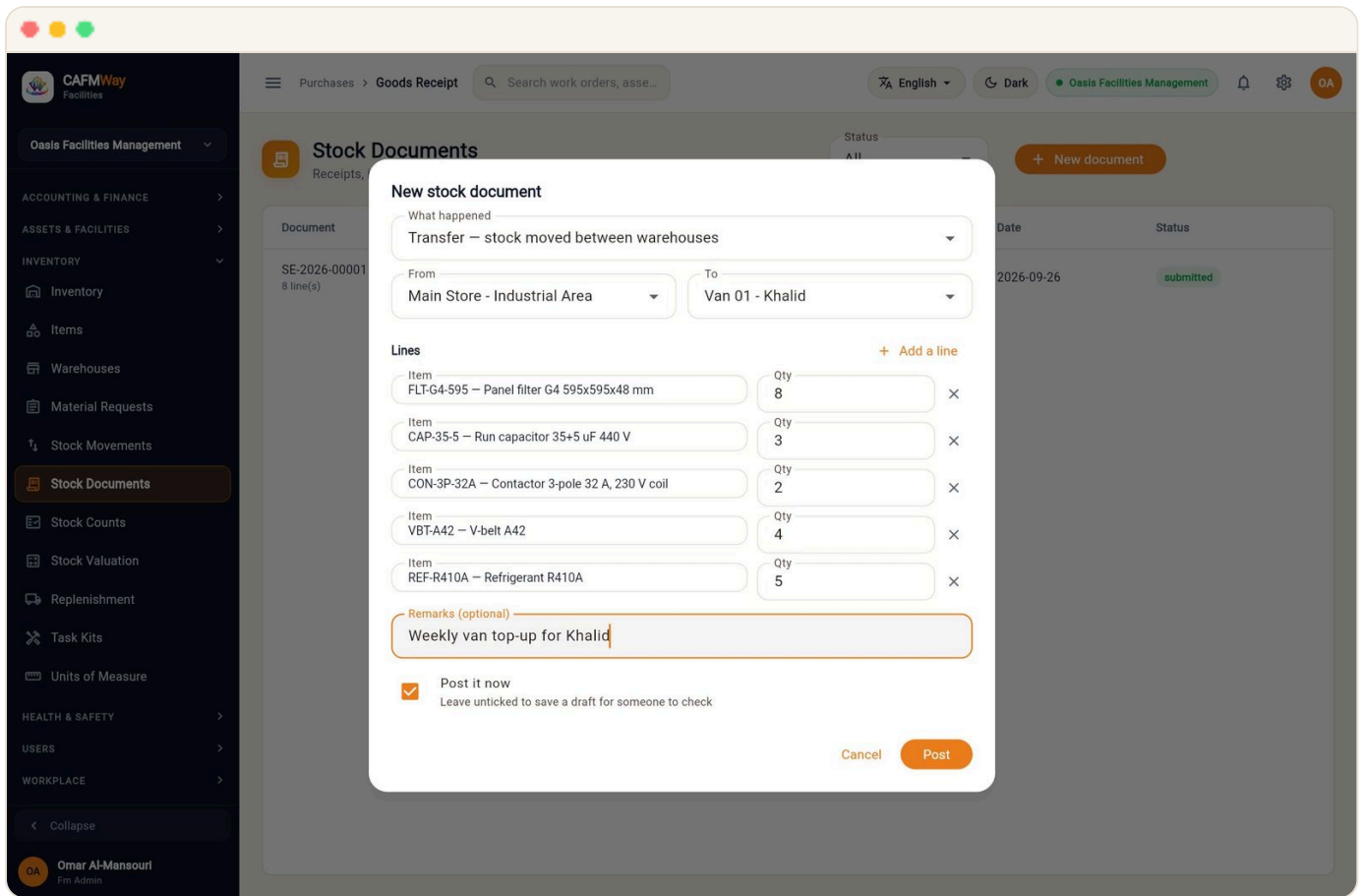


Figure 147 The weekly top-up of Van 01 from the main store

The stock moves at the main store's average cost. A transfer between two stores does not change the stock value, so it posts nothing to the ledger.

Write off damaged stock

Two LED panels arrived with cracked diffusers. They were first moved to the quarantine store with a transfer; when the supplier declined a replacement they were written off:

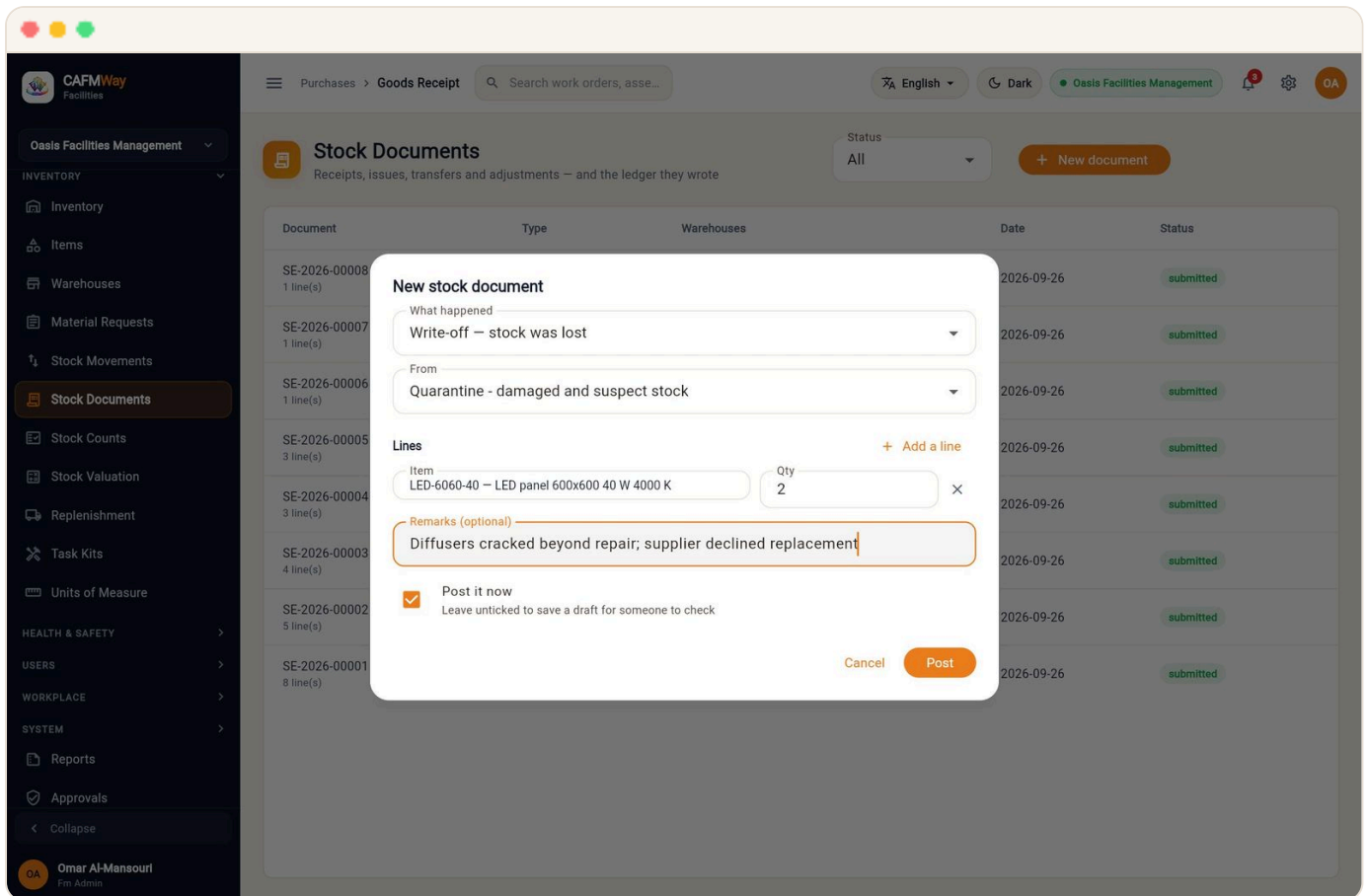


Figure 148 Writing off two LED panels from the quarantine store

Correct a quantity

A spot check found 12 m of cable missing from the main store. Post an adjustment with a negative quantity:

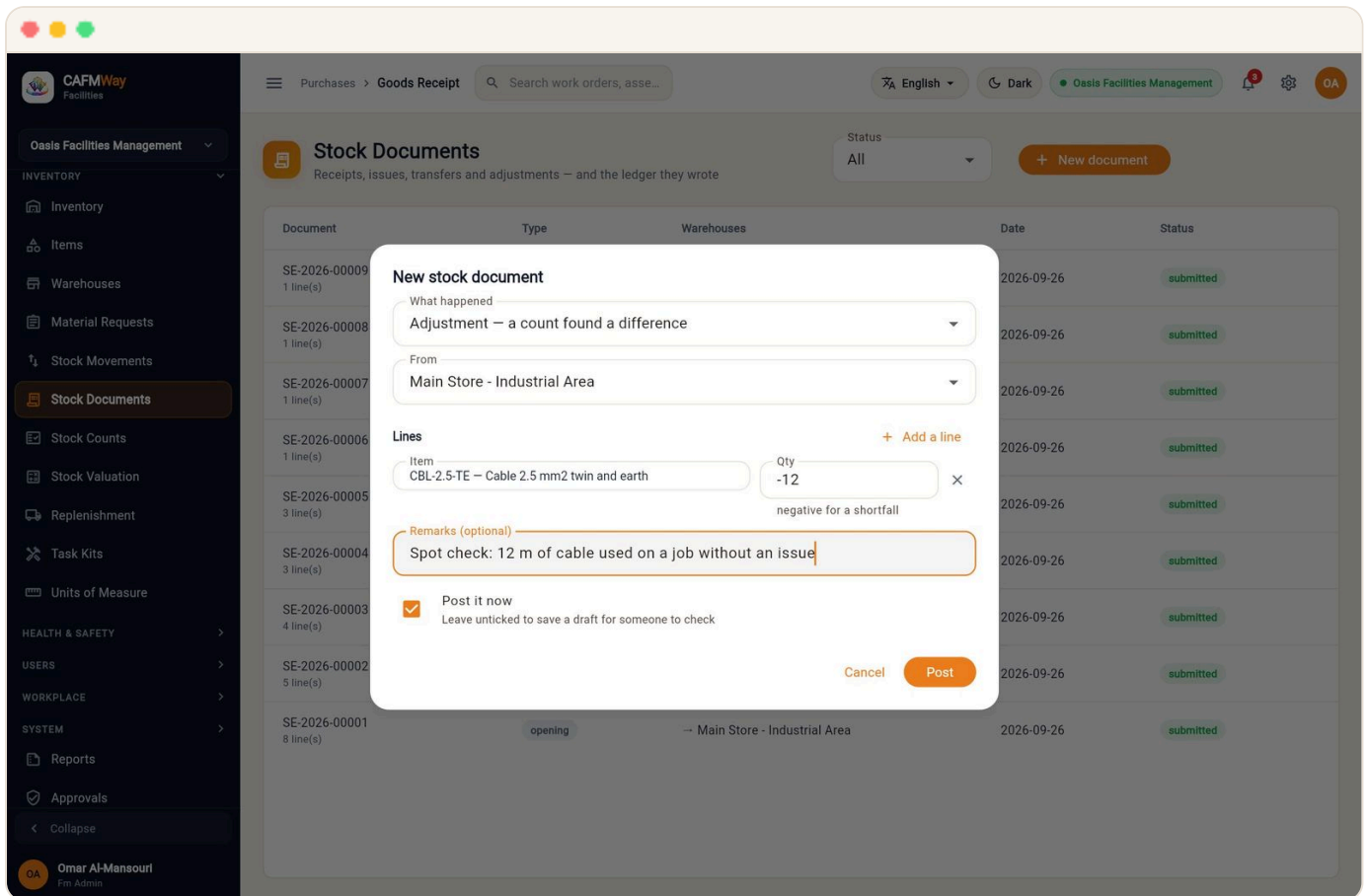


Figure 149 An adjustment of minus 12 metres of cable

Check and post a draft

A document saved with **Post it now** unticked stays a draft and changes nothing. Click it in the list, check the lines and click **Post it**.

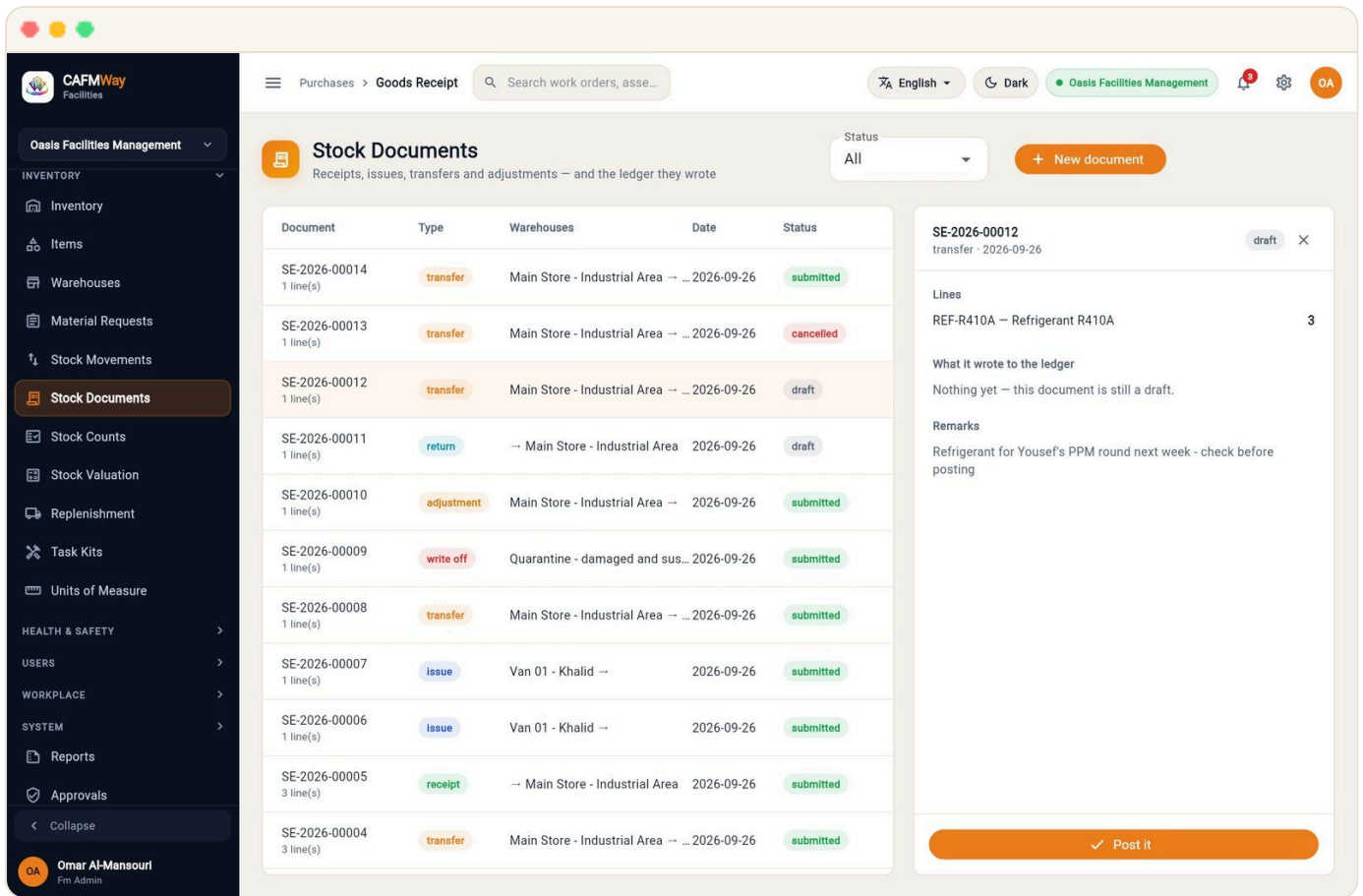


Figure 150 Draft transfer SE-2026-00012: nothing written to the ledger yet, with the Post it button

Reverse a posted document

Posted documents are never edited or deleted. To undo one, click it, click **Reverse it**, enter the **Reason** and click **Reverse it** again. A mirror-image document is posted and the original is marked **Cancelled**.

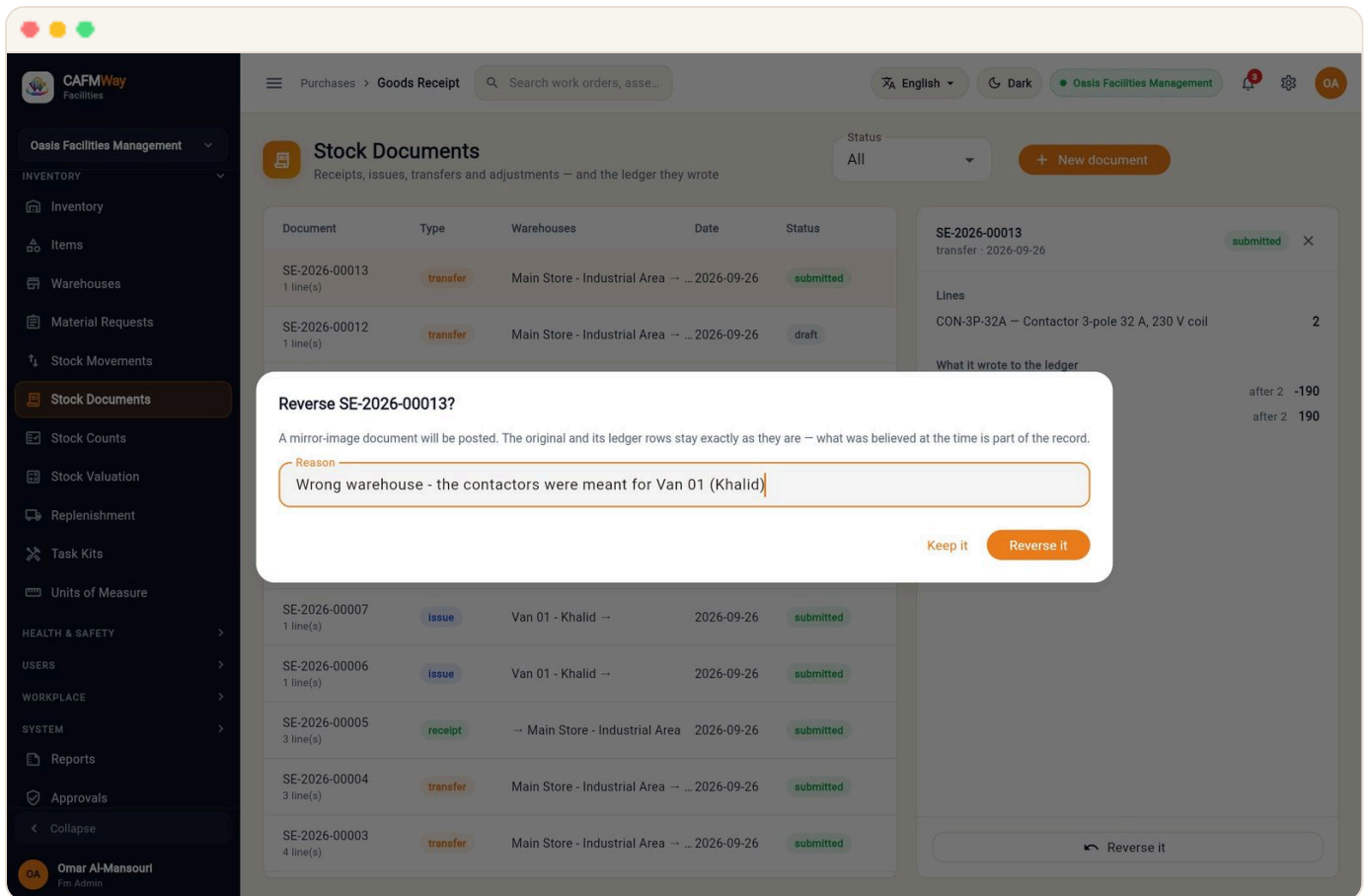


Figure 151 Reversing a transfer that went to the wrong van

BUSINESS RULE

A transfer needs two different warehouses. Only an adjustment may carry a negative quantity. Stock cannot go below zero: taking out more than is on hand is refused with a message that states how much is available in that warehouse. A document cannot be dated before a later movement of the same item.

CAUTION

Reverse only the original document. Do not reverse a reversal; post a new document instead.

The ledger entries for each type are listed in Accounting.

Stock counts

Who: FM Administrator, FM Manager, Procurement Officer schedule and approve; Supervisor can count

Where: Sidebar → INVENTORY → **Stock Counts**

A count compares what is on the shelf with what the system believes, and posts the approved difference as one adjustment. Counts are blind by default: the counter does not see the expected quantity.

Classify the items

The panel at the top shows how often each class should be counted: A every 30 days, B every 90 days, C every 365 days. Click **Reclassify** and confirm to rank the items by the value they consumed over the last year. **Schedule what is due** then schedules every count that is due under these cycles.

Count a van

- 1 Click **Schedule a count**. Choose the **Warehouse**, the **Type** (**Cycle — a slice of the warehouse, Full — everything, including nil, Spot — a quick check or Van — a technician's stock**), optionally an **ABC class (optional)**, keep **Blind count** ticked and click **Schedule**.

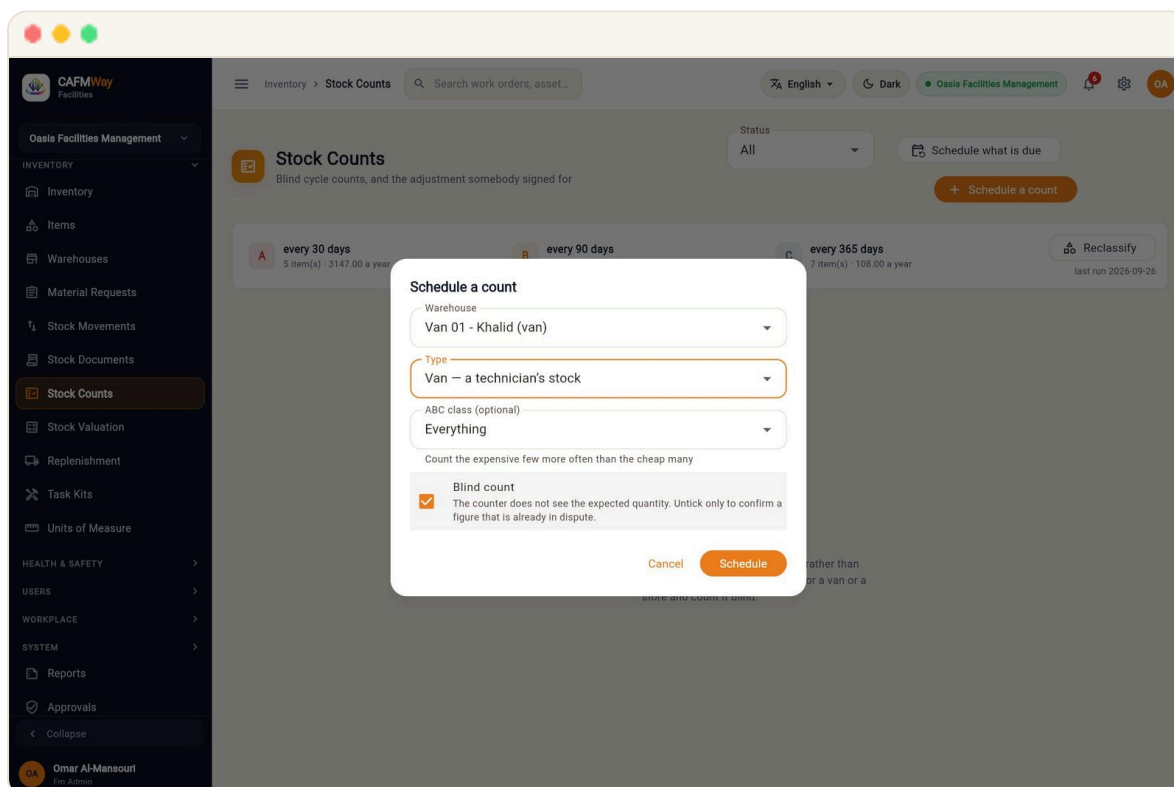


Figure 152 Scheduling a blind van count for Van 01

- 2 Click **Start** on the scheduled count and confirm. The system quantities are frozen at this moment.
- 3 Click the count to open the sheet. Enter the **Counted** quantity for each item and click **Save progress** as you go.

The screenshot displays the CAFMWay Stock Counts interface. The left sidebar contains navigation options: INVENTORY (Inventory, Items, Warehouses, Material Requests, Stock Movements, Stock Documents, Stock Counts, Stock Valuation, Replenishment, Task Kits, Units of Measure), HEALTH & SAFETY, USERS, WORKPLACE, and SYSTEM (Reports, Approvals, Collapse). The main content area shows the 'Stock Counts' section for 'SC-2026-00001 - Van 01 - Khalid'. It includes a status dropdown set to 'All', a 'Schedule what is due' button, and a '+ Schedule a count' button. The table below lists items and their counted quantities:

Item	Counted
CAP-35-5 - Run capacitor 35+5 uF 440 V	2
CON-3P-32A - Contactor 3-pole 32 A, 230 V coil	2
FLT-G4-595 - Panel filter G4 595x595x48 mm	3
REF-R410A - Refrigerant R410A	3
VBT-A42 - V-belt A42	

At the bottom right, there are buttons for 'Save progress' and 'Submit for approval'.

Figure 153 The blind count sheet for Van 01, with four of five lines counted

- 4 When every line is counted, click **Submit for approval**. The sheet now shows **Expected**, **Difference** and **Value** for each line and the total variance.

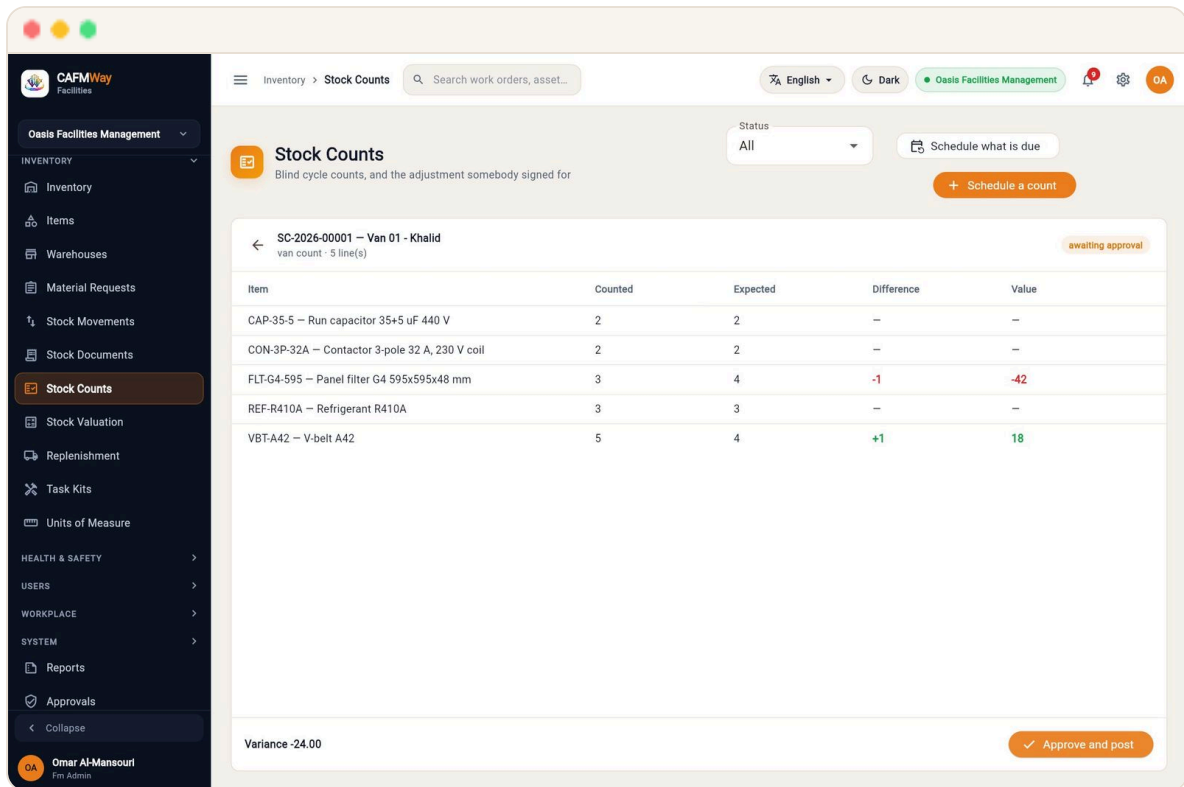


Figure 154 The submitted count: one filter short (-42) and one V-belt over (+18), variance -24.00

5

The approver clicks **Approve and post** and confirms. One adjustment document is posted for all the differences (SE-2026-00016, remark "Stock count SC-2026-00001") and the count becomes **Approved**.

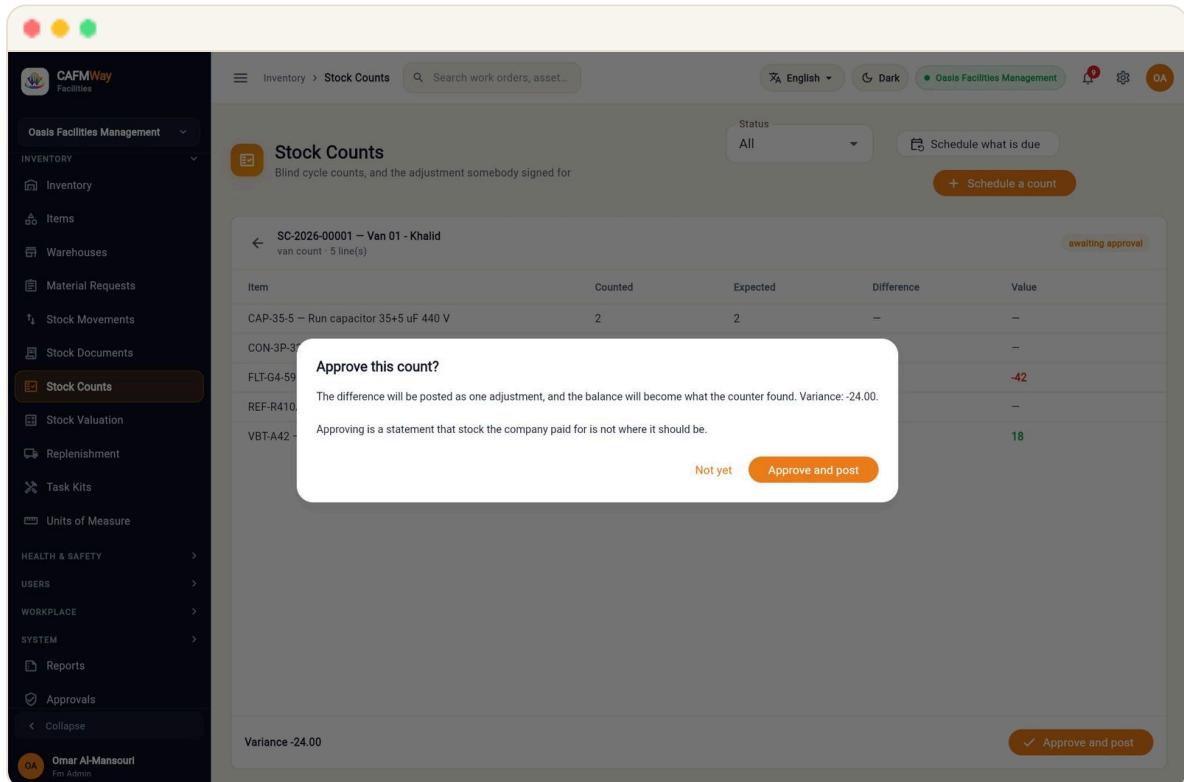


Figure 155 Confirming the count

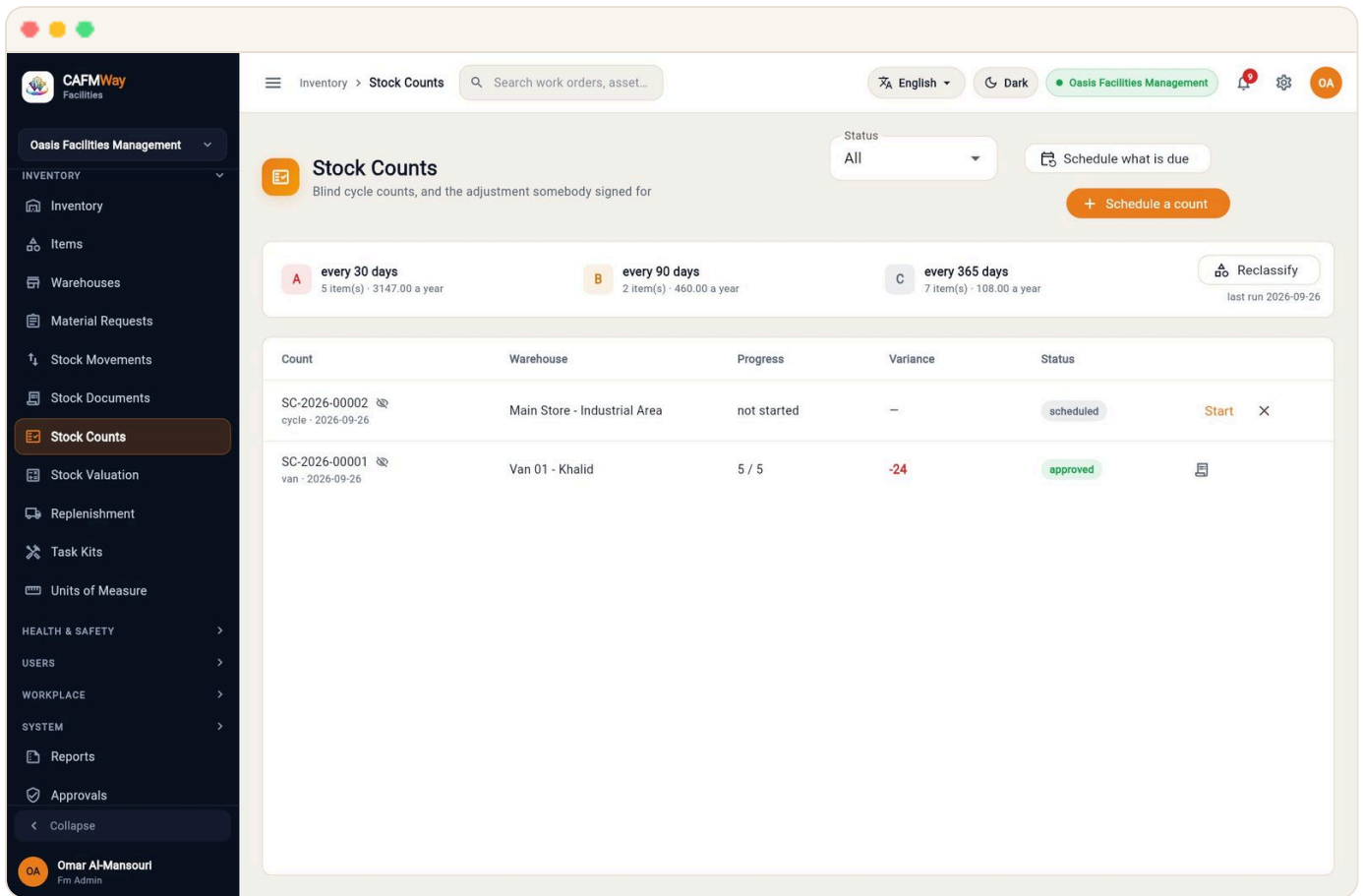


Figure 156 Stock counts: Van 01 approved with a variance of –24, the main store's A-class count scheduled

BUSINESS RULE

A warehouse can have only one open count at a time. Every line must be counted before the count can be submitted: an empty line means "nobody got to it", not "there were none". A count can be cancelled until it is approved. The difference posts to the stock count adjustment account (see Accounting).

Stock valuation

Who: FM Administrator, FM Manager, Finance Officer, Auditor

Where: Sidebar → INVENTORY → **Stock Valuation**

This screen shows what the stock is worth and how each value was reached. **STOCK VALUE** at the top is the total. The table lists every stock movement with its quantity, rate, the average after it and the value after it; **CURRENT VALUATION** on the right lists the current quantity, average and value of each item in each warehouse.

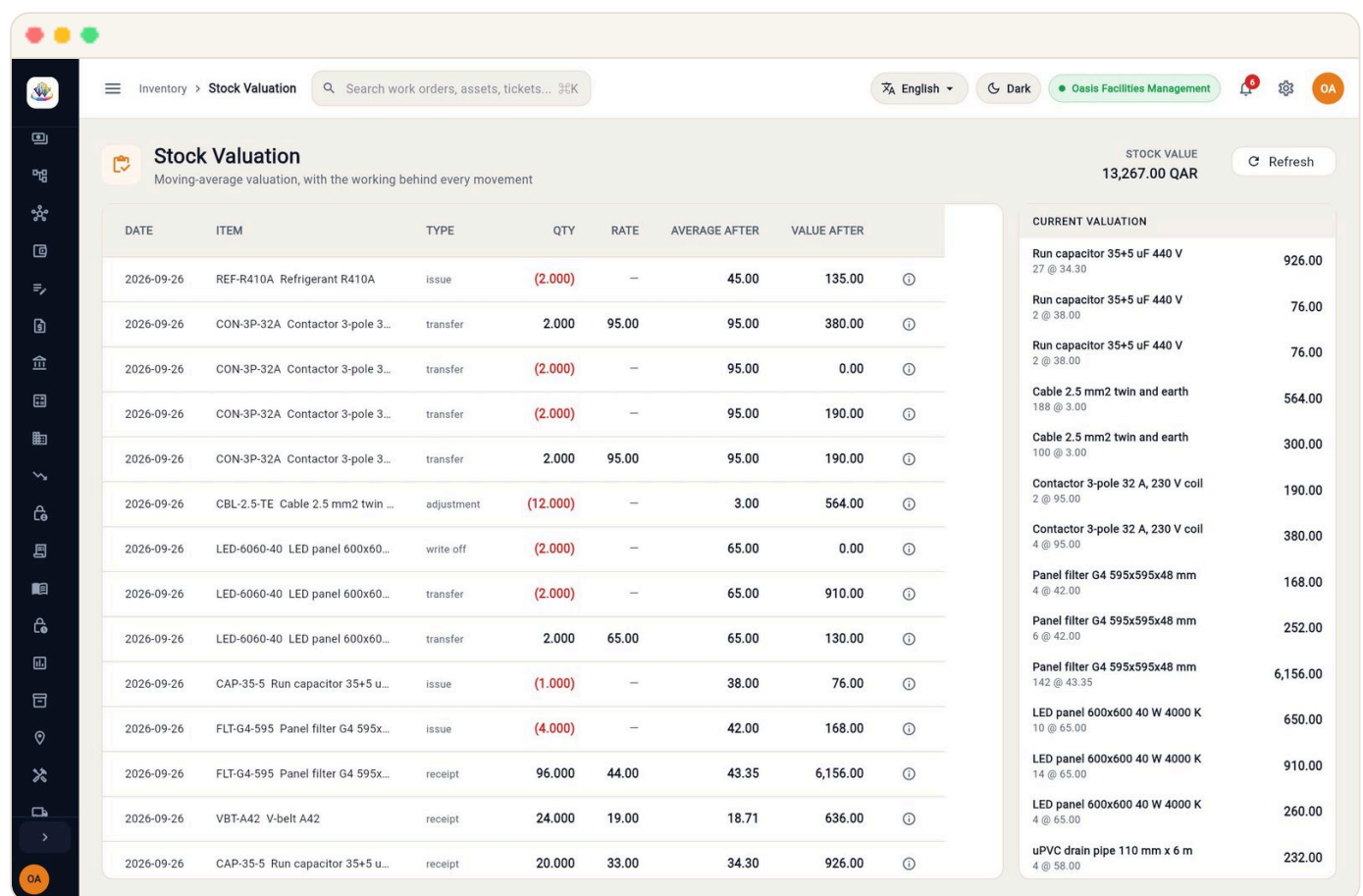


Figure 157 Stock valuation: QAR 13,267.00 in stock, with the movements and current values

Click the information icon at the end of a row to see how the moving average was worked out for that movement.

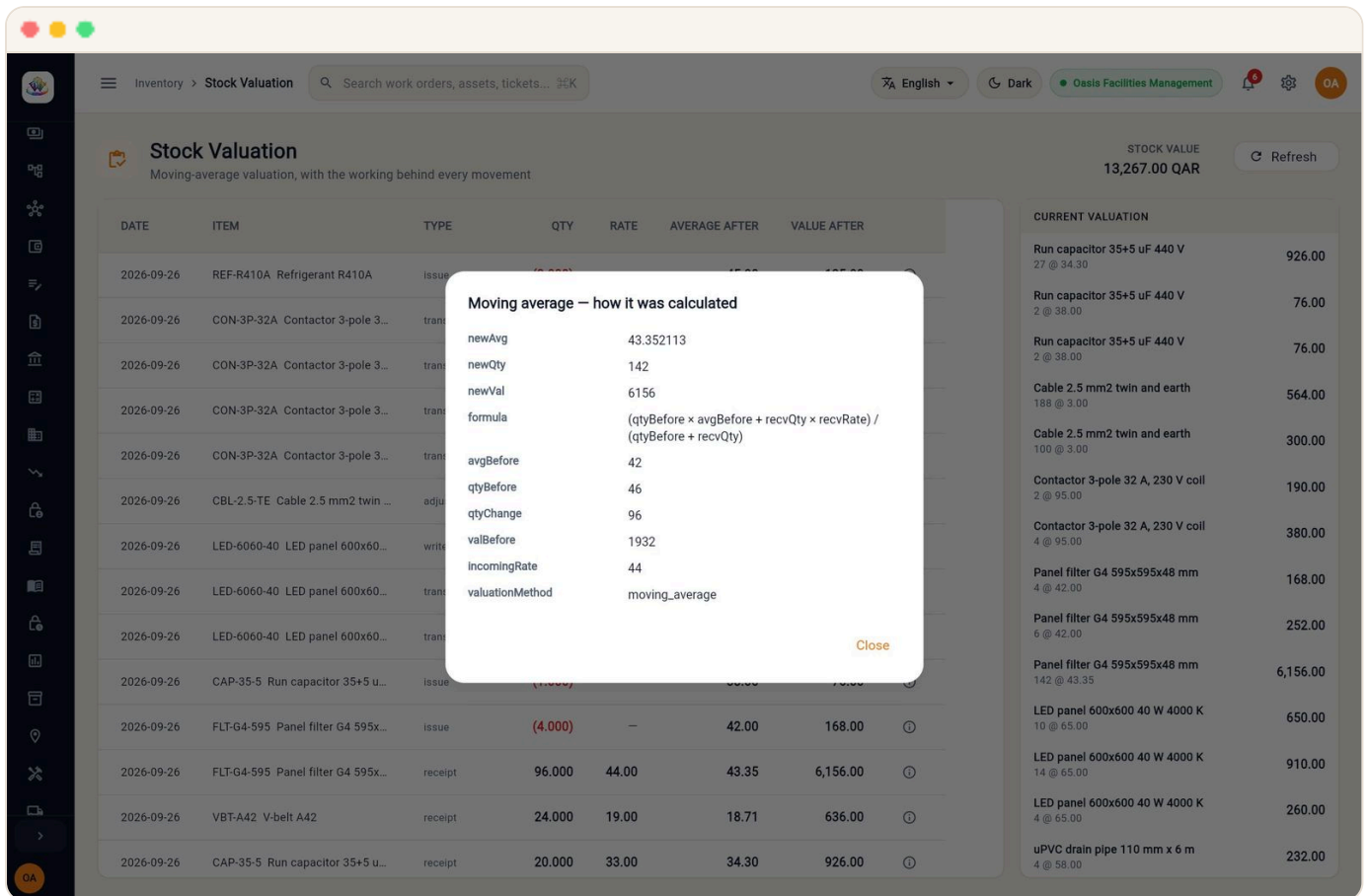


Figure 158 How the filter's average of 43.35 was calculated after the receipt

NOTE

The valuation method is always the moving average for each item in each warehouse. Receipts move the average; issues, transfers and write-offs take stock out at it.

Replenishment

Who: FM Administrator, FM Manager; Supervisor

Where: Sidebar → INVENTORY → **Replenishment**

Replenishment keeps vans and stores between a minimum and a maximum, and tells the storekeeper what to send.

Set the levels

- 1 Open the **Levels** tab and click **Set a level**.
- 2 Pick the **Item** and the **Warehouse**, and enter the **Minimum** and the **Maximum** (a top-up fills to the maximum). Optionally enter a **Minimum order quantity (optional)** and a **Source warehouse**; leave it at **Parent store** to top up from the warehouse's parent.
- 3 Click **Save**.

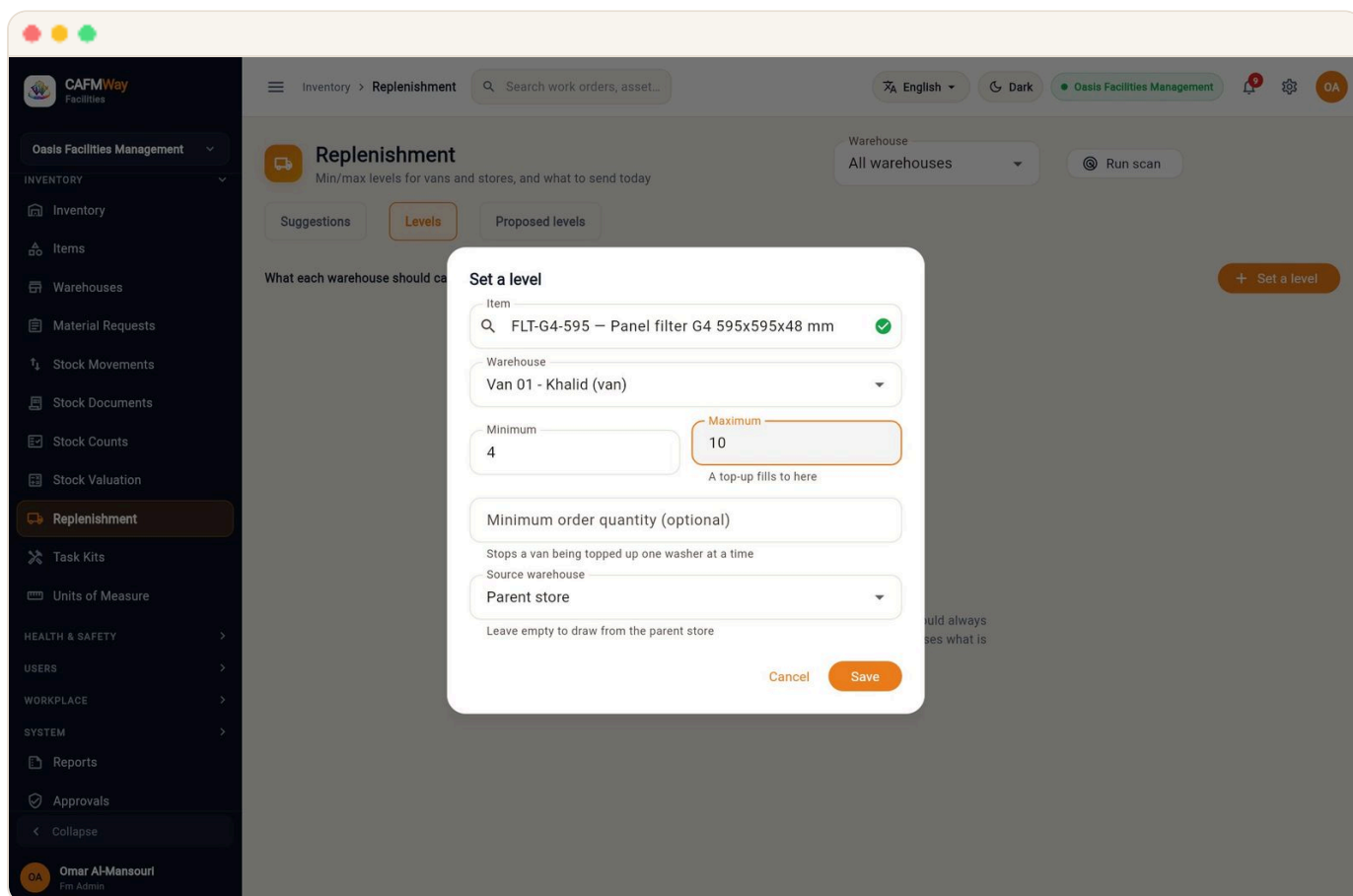
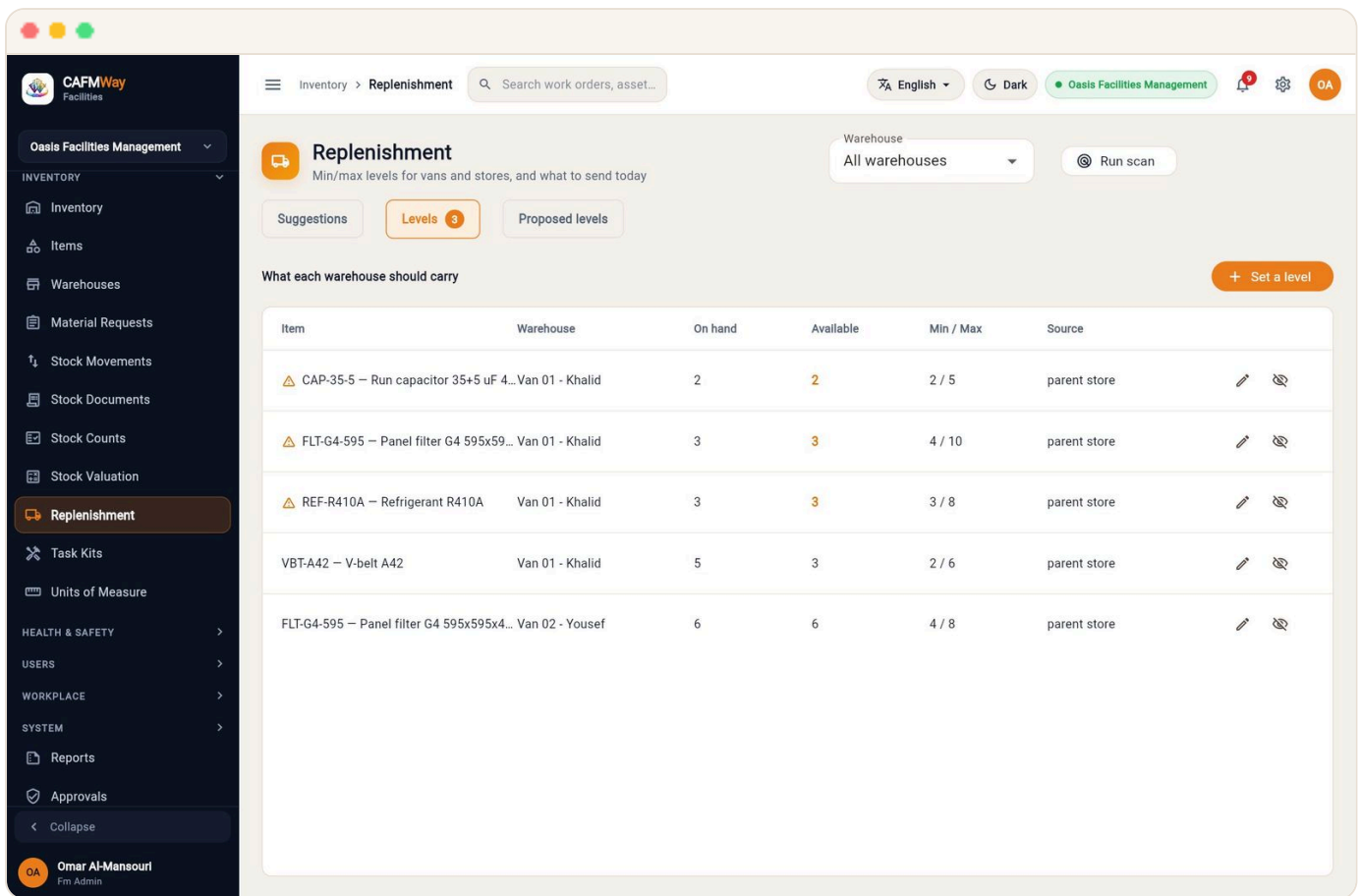


Figure 159 Setting filter levels for Van 01: minimum 4, maximum 10

The **Levels** tab shows on-hand and available stock (on hand less anything reserved for jobs) against each level. A warning sign marks items at or below their minimum.



The screenshot shows the CAFMWay web application interface. The left sidebar contains a navigation menu with categories like INVENTORY, HEALTH & SAFETY, USERS, WORKPLACE, and SYSTEM. The main content area is titled 'Replenishment' and shows a table of items with their current stock levels. The table has columns for Item, Warehouse, On hand, Available, Min / Max, and Source. A 'Levels' tab is selected, indicating items at or below their minimum. A 'Run scan' button is visible in the top right.

Item	Warehouse	On hand	Available	Min / Max	Source
⚠ CAP-35-5 – Run capacitor 35+5 uF 4... Van 01 - Khalid		2	2	2 / 5	parent store
⚠ FLT-G4-595 – Panel filter G4 595x59... Van 01 - Khalid		3	3	4 / 10	parent store
⚠ REF-R410A – Refrigerant R410A Van 01 - Khalid	Van 01 - Khalid	3	3	3 / 8	parent store
VBT-A42 – V-belt A42 Van 01 - Khalid	Van 01 - Khalid	5	3	2 / 6	parent store
FLT-G4-595 – Panel filter G4 595x595x4... Van 02 - Yousef		6	6	4 / 8	parent store

Figure 160 Levels for Van 01 and Van 02: capacitors, filters and refrigerant at or below the minimum

Scan and raise a request

- 1 Click **Run scan**. Each warehouse with items at or below their minimum gets a card on the **Suggestions** tab, for example "Van 01 - Khalid · 3 item(s) short — from Main Store - Industrial Area". The scan also runs every night.
- 2 Click **Raise one request** on the card and confirm with **Raise request**. One replenishment request (MR-2026-00001) is raised to move the shortfall from the source store to the van. It needs approval before anything moves.

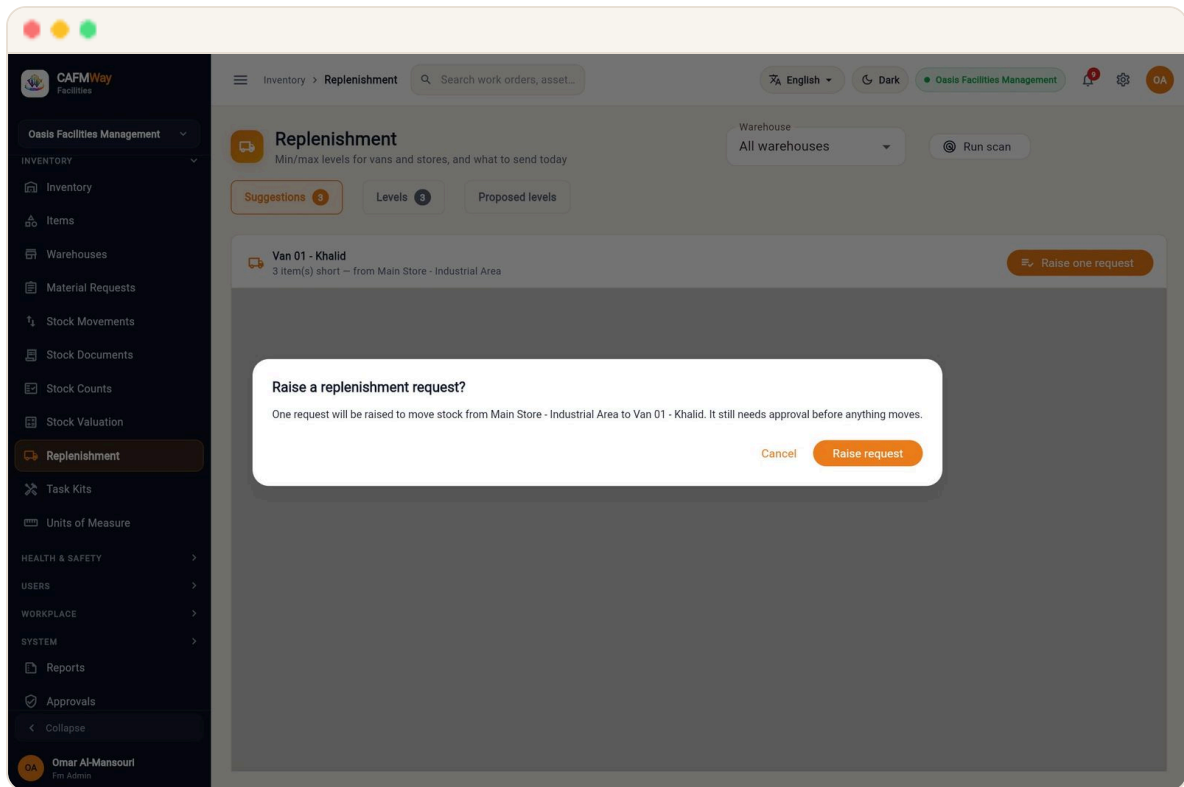


Figure 161 Raising one replenishment request for Van 01

3

When no warehouse is short, the tab shows **Nothing is short.**

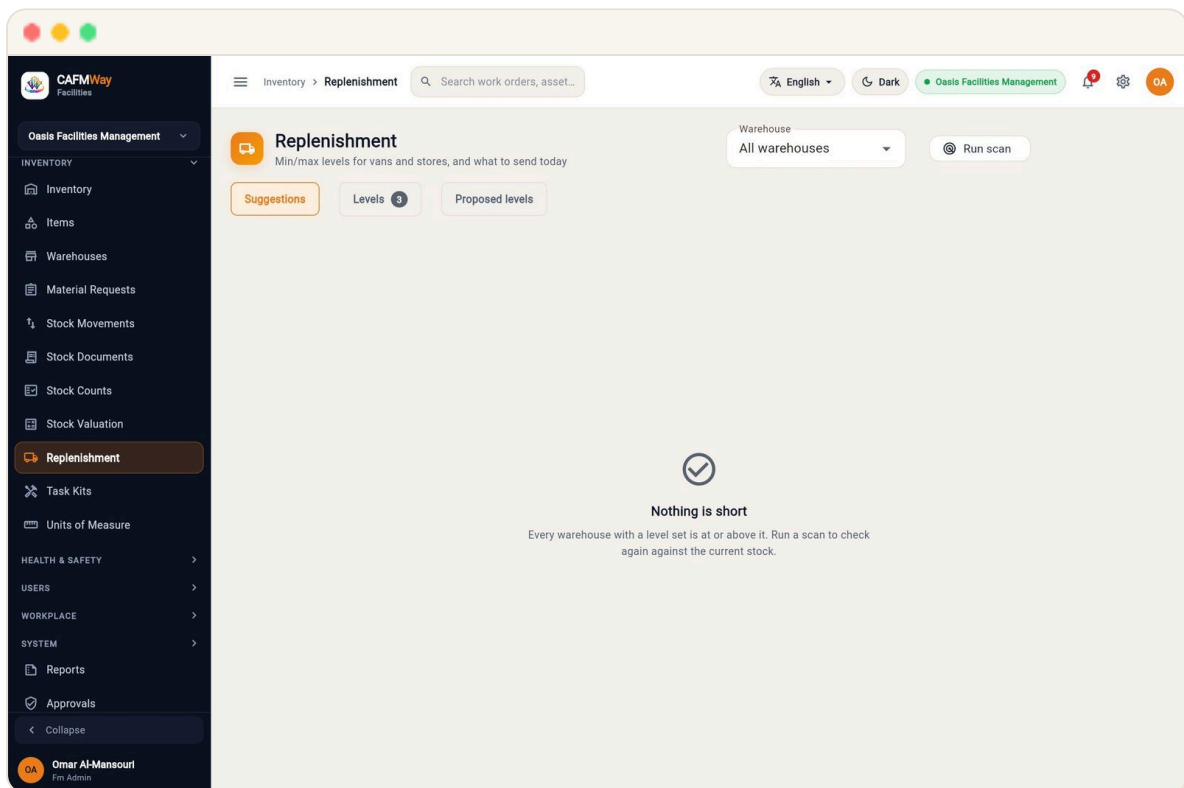


Figure 162 The Suggestions tab after the request was raised

BUSINESS RULE

The maximum must be at least the minimum, and a warehouse cannot be its own source.

NOTE

The **Proposed levels** tab, which works out levels from actual consumption, is not available yet. Until the replenishment request can be issued from this screen, load the van with a transfer (see Stock documents).

Task kits

Who: FM Administrator, FM Manager

Where: Sidebar → INVENTORY → **Task Kits**

A task kit says which parts one standard job consumes, so that planned maintenance can be forecast. Standard tasks are set up in the organisation settings.

- 1 On the **Kits** tab, click a task, for example **Replace AHU filter set**.
- 2 Click **Add a part**, pick the **Part**, enter the **Quantity for one job**, and untick **Always needed** for a part that is only sometimes needed (it is forecast but never reserved).
- 3 Click **Add**.

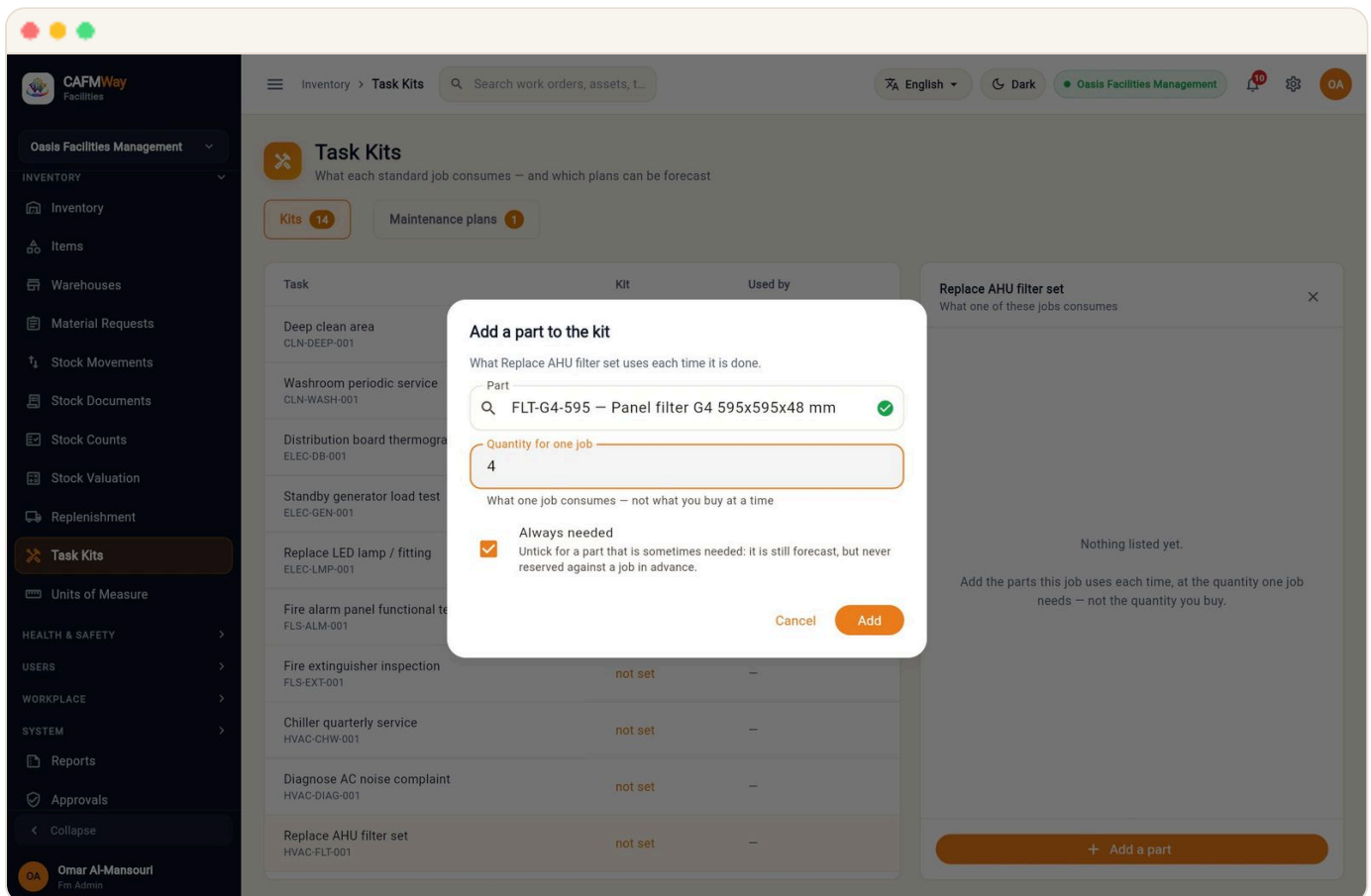


Figure 163 Adding four G4 filters to the AHU filter kit

The screenshot shows the CAFMWay web application interface. The left sidebar contains navigation links for Inventory, Items, Warehouses, Material Requests, Stock Movements, Stock Documents, Stock Counts, Stock Valuation, Replenishment, Task Kits (selected), Units of Measure, Health & Safety, Users, Workplace, System, Reports, Approvals, and a user profile for Omar Al-Mansouri. The main header includes a search bar and language/theme settings. The 'Task Kits' section is active, displaying a table of tasks and their associated kits. The 'Replace AHU filter set' kit is highlighted, showing its components: 4 Panel filters (FLT-G4-595) and 2 V-belts (VBT-A42).

Task	Kit	Used by
Deep clean area CLN-DEEP-001	not set	—
Washroom periodic service CLN-WASH-001	not set	—
Distribution board thermography ELEC-DB-001	not set	—
Standby generator load test ELEC-GEN-001	not set	—
Replace LED lamp / fitting ELEC-LMP-001	1 part(s)	—
Fire alarm panel functional test FLS-ALM-001	not set	—
Fire extinguisher inspection FLS-EXT-001	not set	—
Chiller quarterly service HVAC-CHW-001	not set	—
Diagnose AC noise complaint HVAC-DIAG-001	not set	—
Replace AHU filter set HVAC-FLT-001	2 part(s)	—

Replace AHU filter set
What one of these jobs consumes

FLT-G4-595 – Panel filter G4 595x595x48 mm	4 Piece	×
VBT-A42 – V-belt A42 sometimes needed – forecast, never reserved	2 Piece	×

+ Add a part

Figure 164 The AHU filter kit: four filters always, two V-belts sometimes

On the **Maintenance plans** tab, click **Link** (or **Change**) on a plan, choose the task in **This plan performs** and the warehouse in **Draws parts from**, and click **Save**. A plan can be forecast once its task has a kit.

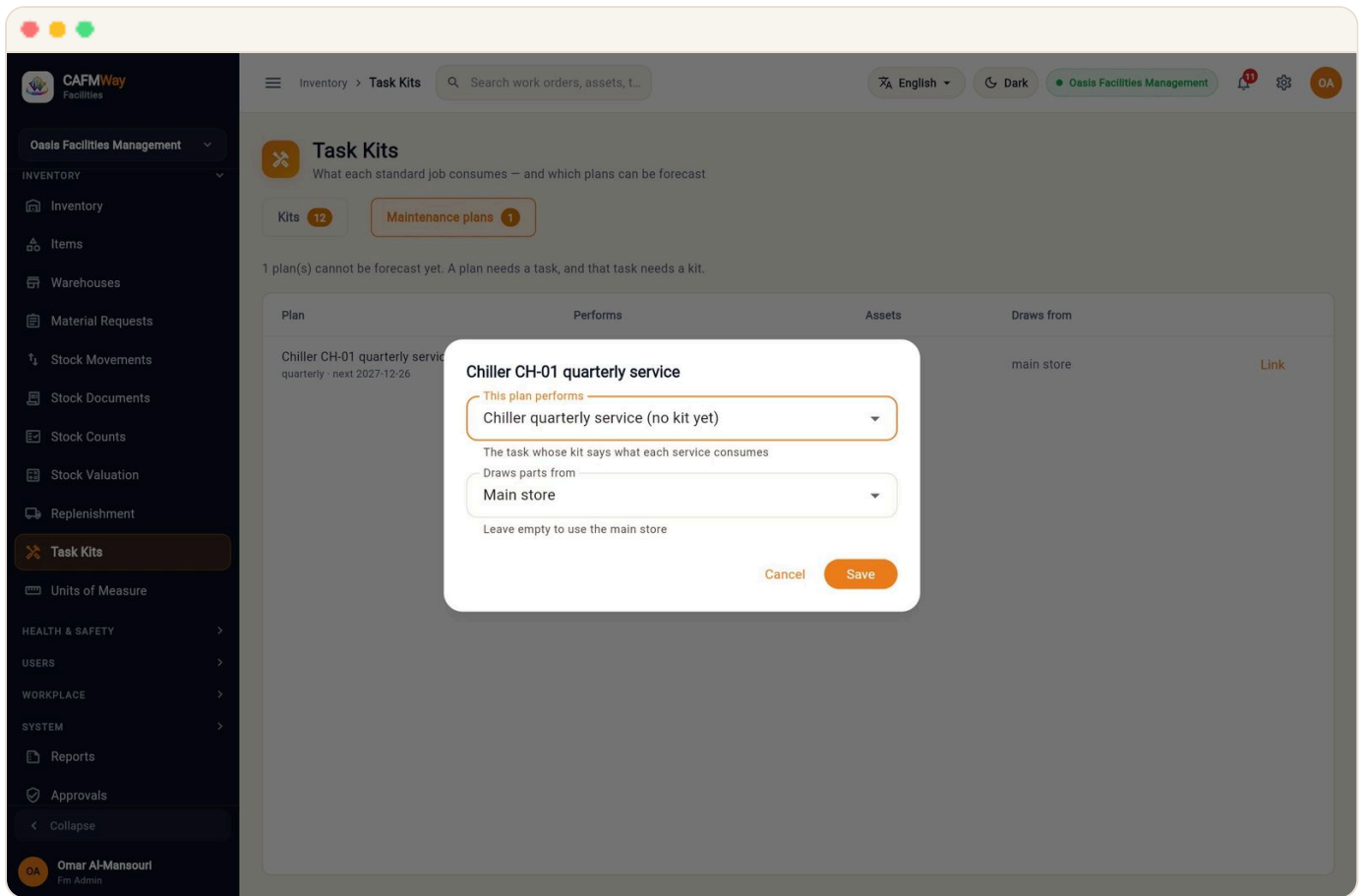


Figure 165 Linking the Chiller CH-01 quarterly service plan to its standard task

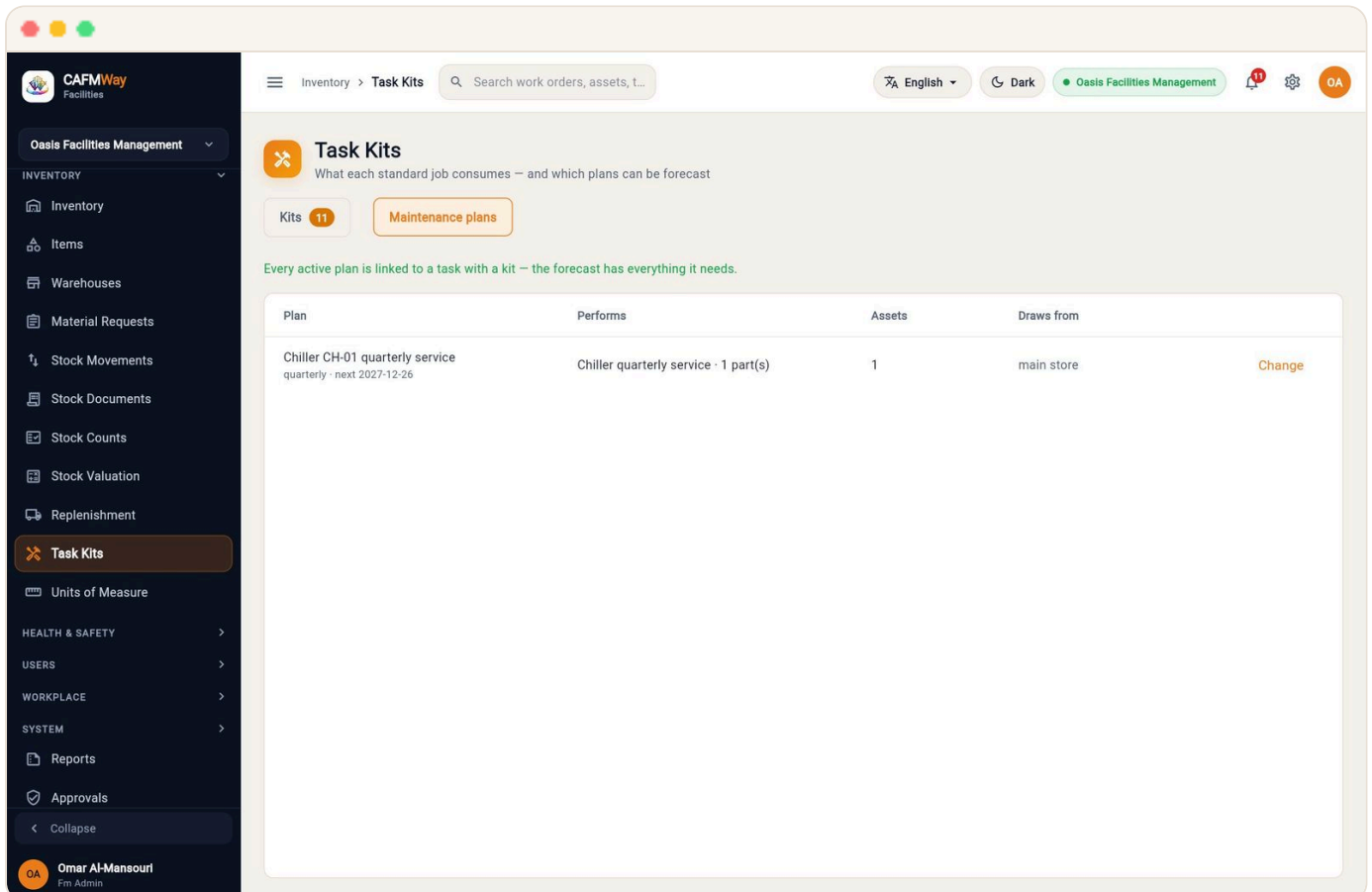


Figure 166 Every active plan linked to a task with a kit

Inventory overview and stock movements

Who: anyone with access to Inventory
Where: Sidebar → INVENTORY → **Inventory** and **Stock Movements**

Inventory gives a quick overview: the number of items, how many are critically low or low, the stock value, and a list of items that have reached their reorder point. **Stock List** below lists every item with its stock level bar.

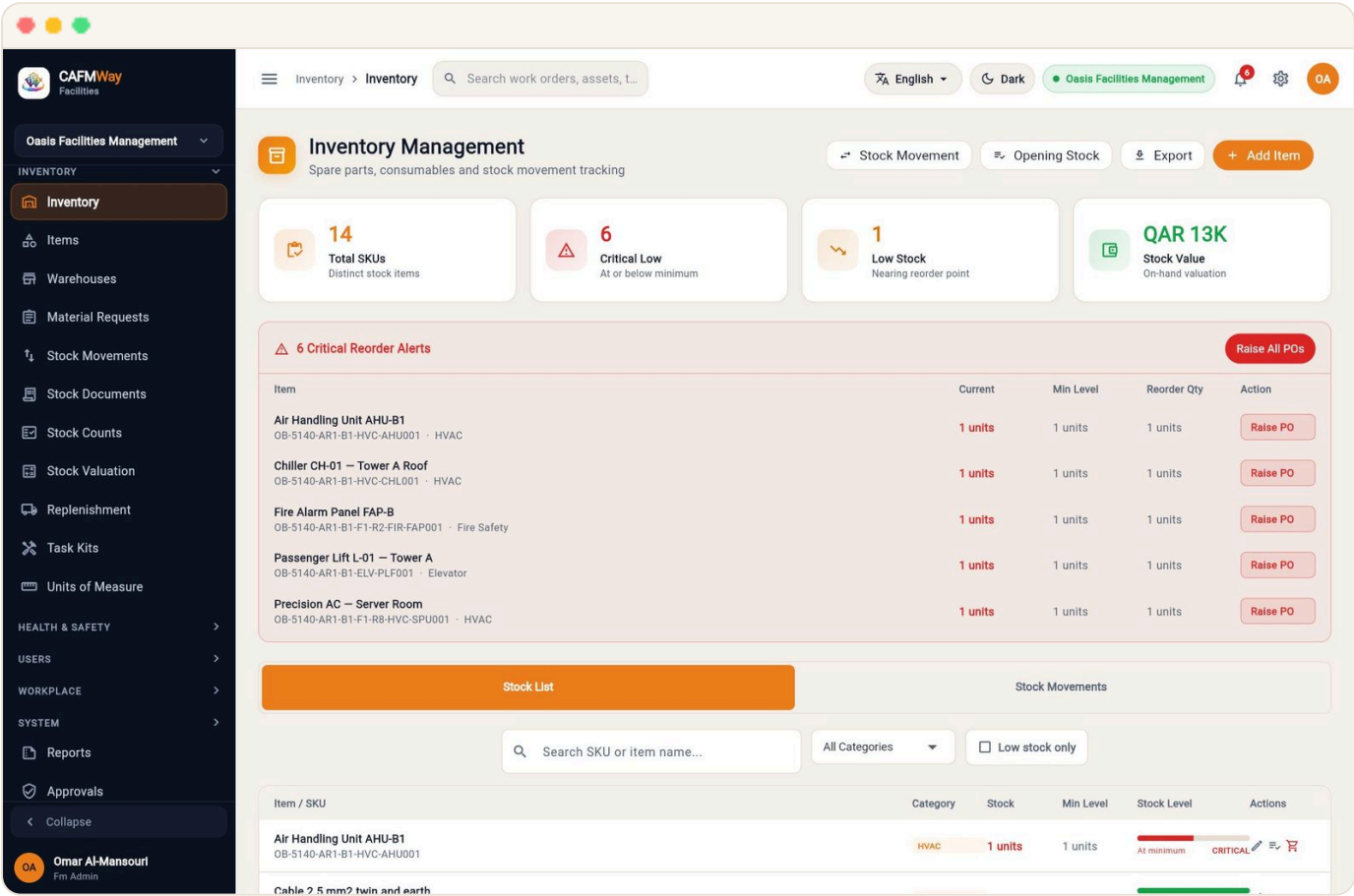


Figure 167 Inventory management: counts of low items and the reorder alerts

CAUTION

Change quantities with stock documents, not with the **Stock Movement** and **Opening Stock** buttons on this page. Those buttons change the item's total only, not the stock of any warehouse, and are not posted to the ledger. **Raise PO** only flags the item; raise the order under **Purchase Order**.

Stock Movements lists quantity changes made from the Inventory page. Movements recorded with stock documents, issues and counts are shown in **Stock Documents** and **Stock Valuation** instead.

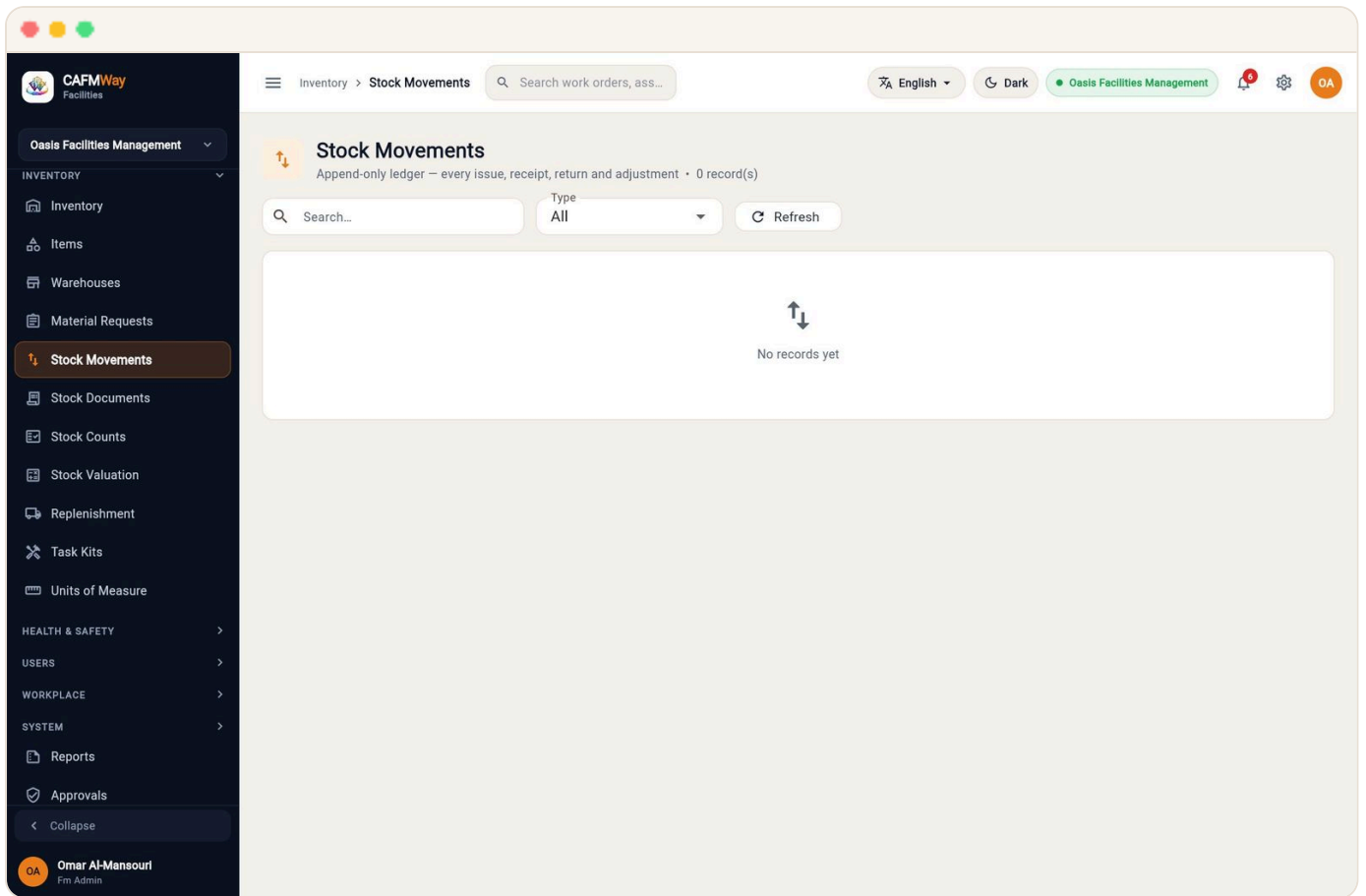


Figure 168 Stock Movements with no quantity changes made from the Inventory page

Accounting and finance

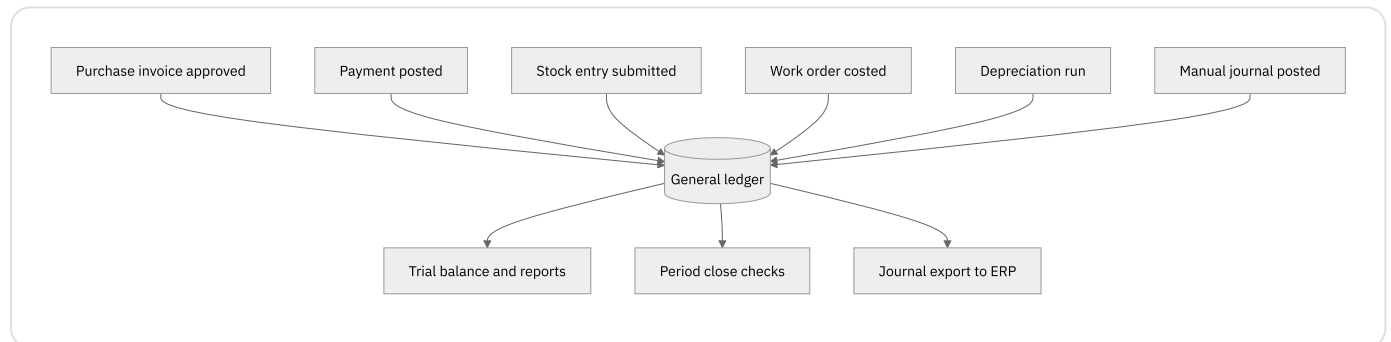
This part covers the ledger that sits behind CAFM Way: the chart of accounts, cost centres and budget, manual journals, how purchase invoices, payments, stock and work-order costs reach the general ledger, the month-end close and the financial reports. It is written for finance officers, FM managers and the company administrator.

Accounting at a glance

Who: FM Administrator, FM Manager, Finance Officer; Auditor (read only)

Where: Sidebar → **ACCOUNTING & FINANCE**, plus **PURCHASES** (invoices and payments) and **SYSTEM** → **Journal Export**

CAFM Way keeps one double-entry general ledger (GL) per company. You rarely type into it directly. Each operational document posts its own entry at the moment it is approved or submitted, and the ledger refuses anything that does not balance. Manual journals are kept for the few things no document produces: opening balances, accruals and corrections.



The rules below apply to every posting, whatever document it comes from:

Rule	What it means for you
Balanced	Total debits must equal total credits. Differences of up to 0.02 QAR are moved to 7900 Rounding Adjustment ; anything larger is refused.
Open period	The posting date must fall in an open fiscal month. A closed month refuses every posting.
Postable account	Group accounts (for example 2100 Current Liabilities) never take postings. Inactive accounts are refused.
Control accounts	Receivables (1120), inventory (1130), retention (1140, 2120), fixed assets (1210, 1220) and payables (2110) can only be posted by their own documents, never by a manual journal.
Dimensions	Some accounts demand a dimension. 5100 Direct Labour , 5200 Materials and Parts Consumed and 5300 Subcontractor Costs need a work order.
No editing	A posted entry is never changed or deleted. You correct it with a reversal, which posts a mirror-image entry.

Suggested order for a new company:

- 1 Review the chart of accounts and add the accounts you are missing.
- 2 Create cost centres and check the budget.
- 3 Post the opening balances as a journal entry.
- 4 Let the day-to-day documents post: purchase invoices, payments, stock entries.
- 5 At month end, post accruals, cost the completed work orders and run the period-close checklist.
- 6 Read the trial balance, profit and loss and balance sheet, then close the month.

NOTE

The ledger, reports and period close need the **Journal Entry** permission. Reopening a period, running depreciation, capitalising assets and bank reconciliation also need **Company** write access, which the seeded roles give only to the FM Administrator.

Chart of accounts

Who: anyone with Journal Entry read access to view; create and write to add or edit accounts

Where: Sidebar → ACCOUNTING & FINANCE → **Chart of Accounts**

Every company starts with a ready-made chart for a Qatari facilities-management contractor: about 60 accounts in seven groups (1000 Assets to 7000 Other), each with an English and an Arabic name. Control accounts carry a **Control** badge.

- 1 Open **Chart of Accounts**. The tree shows each account's **CODE**, **ACCOUNT**, the dimensions it **REQUIRES**, its **TYPE** and current **BALANCE**.
- 2 Click the arrow beside a group to expand it, or **Collapse all** to fold the tree.
- 3 Type in **Search by code or name...** to find an account. Switch on **Only accounts with a balance** to hide the empty ones.

CODE	ACCOUNT	REQUIRES	TYPE	BALANCE
> 1000	Assets		asset	0.00
> 2000	Liabilities		liability	0.00
> 2100	Current Liabilities		liability	0.00
2110	Accounts Payable Control		liability	0.00
2120	Retention Payable Control		liability	0.00
2130	Advances from Customers		liability	0.00
2140	Accrued Expenses		liability	0.00
2145	Goods Received Not Invoiced		liability	0.00
2150	Withholding Tax Payable		liability	0.00
2160	VAT Payable		liability	0.00
2170	Employee End of Service Benefits		liability	0.00
2180	Payroll Payable		liability	0.00
2200	Non-Current Liabilities		liability	0.00
> 3000	Equity		equity	0.00
> 4000	Revenue		revenue	0.00
> 5000	Direct Costs		expense	0.00
> 6000	Operating Expenses		expense	0.00

Figure 169 The chart of accounts with the Current Liabilities group expanded

Add an account

- 1 Click **New Account**.

- 2 Choose the **Parent group**, for example **6000 Operating Expenses**.
- 3 Enter the **Account code** (6250), **Name (English)** and **Name (Arabic)**.
- 4 Leave **Group account** off for an account that will receive postings.
- 5 Optionally choose **Lock to currency** so the account only accepts one currency.
- 6 Under **Mandatory dimensions**, pick the dimensions every posting must carry: **Department**, **Site**, **Contract**, **Work order** or **Asset**.
- 7 Click **Save**. The account appears in the tree under its parent.

The screenshot shows the 'New Account' dialog box in the CAFMWay application. The dialog is positioned over the 'Chart of Accounts' screen. The 'Parent group' is set to '6000 Operating Expenses'. The 'Account code' is '6250'. The 'Name (English)' is 'Waste Management and Disposal' and the 'Name (Arabic)' is 'إدارة النفايات والتخلص منها'. The 'Group account' toggle is turned off. The 'Lock to currency' dropdown is set to 'Any'. Under the 'Mandatory dimensions' section, the 'Site' dimension is selected with a checkmark. The background shows a list of accounts with columns for CODE, ACCOUNT, TYPE, and BALANCE.

Figure 170 The New Account dialog for 6250 Waste Management and Disposal with the Site dimension required

To change an account later, click its row. The dialog opens as **Edit** followed by the account code.

BUSINESS RULE

A posting to an account with a mandatory dimension is refused unless the dimension is filled in. This is what keeps cost attached to the building, contract or job it came from.

TIP

Keep new accounts inside the existing number ranges (4xxx revenue, 5xxx direct costs, 6xxx overheads). The financial reports group accounts by their type, so a wrongly placed account shows up in the wrong statement.

Cost centres

Who: users with Cost Center access (FM Administrator, FM Manager, Finance Officer)

Where: Sidebar → ACCOUNTING & FINANCE → **Cost Centers**

Cost centres are the organisational units your budget is split across, such as MEP & HVAC or Soft Services. Each card shows the centre's budget, what has been spent and how much of the budget is used.

- 1 Click **Add Cost Center**.
- 2 Enter a short **Code** and a **Name**.
- 3 Click **Create**. The new centre appears as a card.

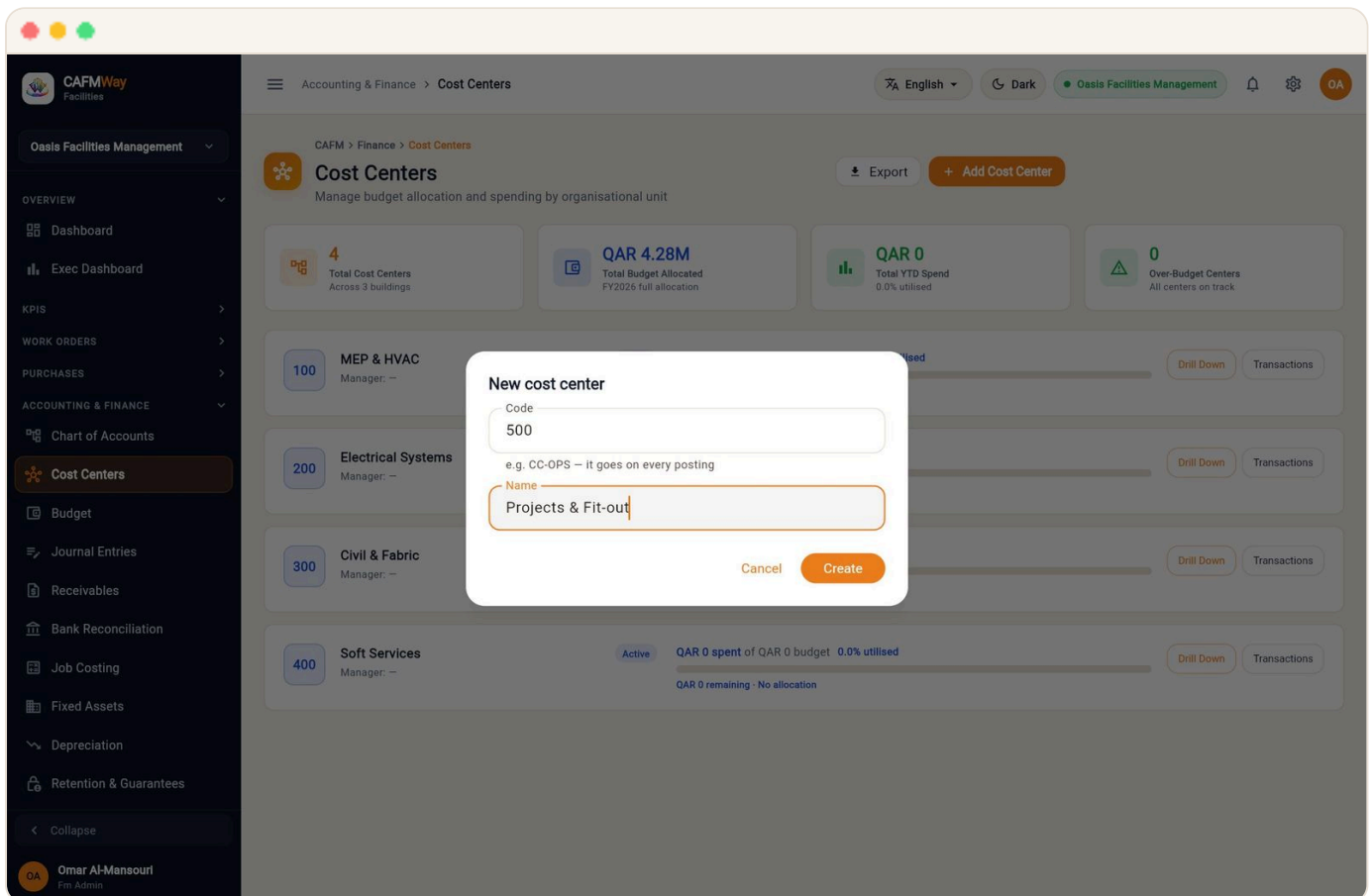


Figure 171 The New cost center dialog for centre 500 Projects & Fit-out

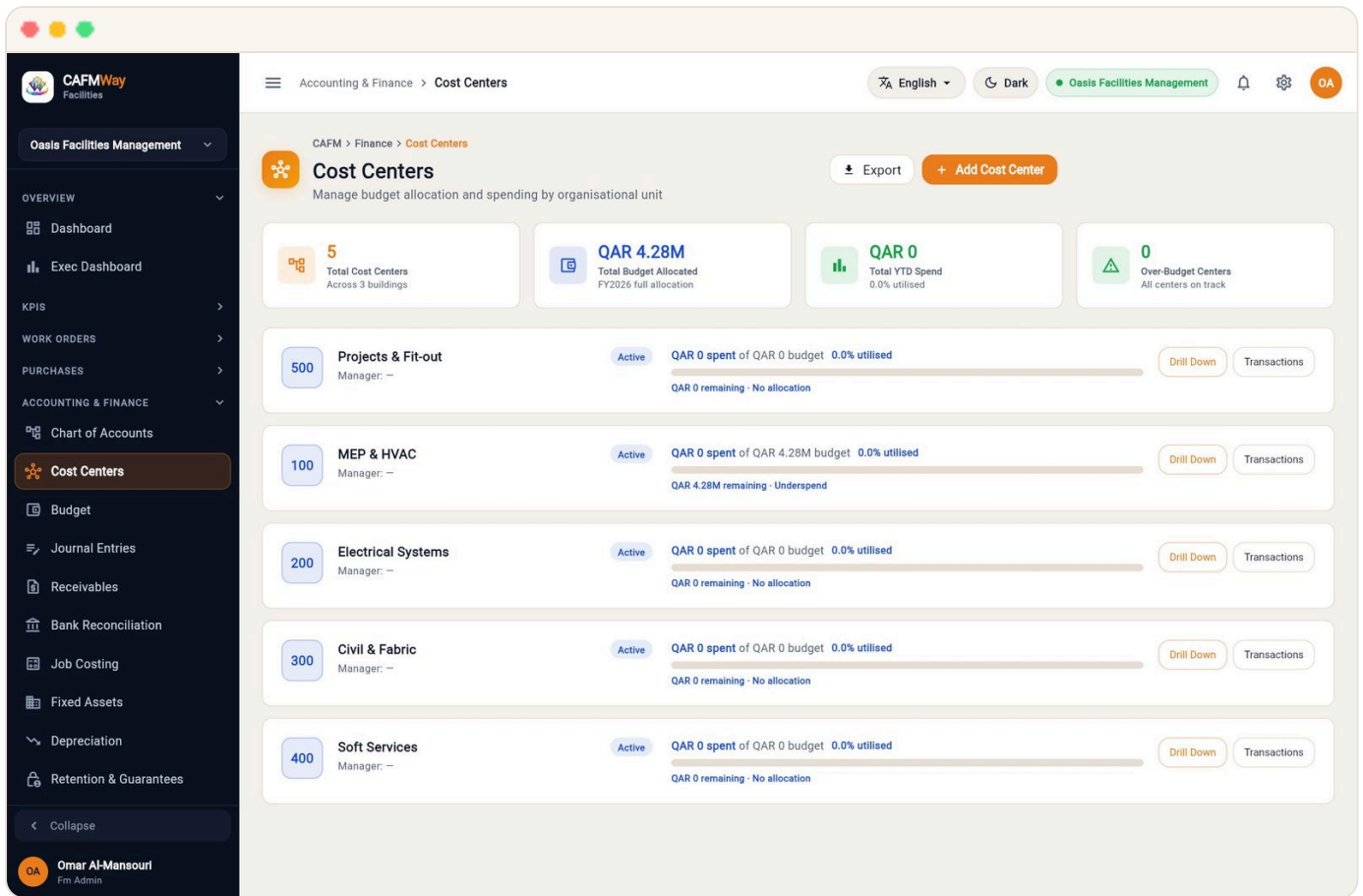


Figure 172 Five cost centres, with MEP & HVAC carrying a 4.28M budget

Click **Drill Down** on a card to see its budget, spend, remaining amount, utilisation and budget sub-items. **Export** downloads the list as a CSV file.

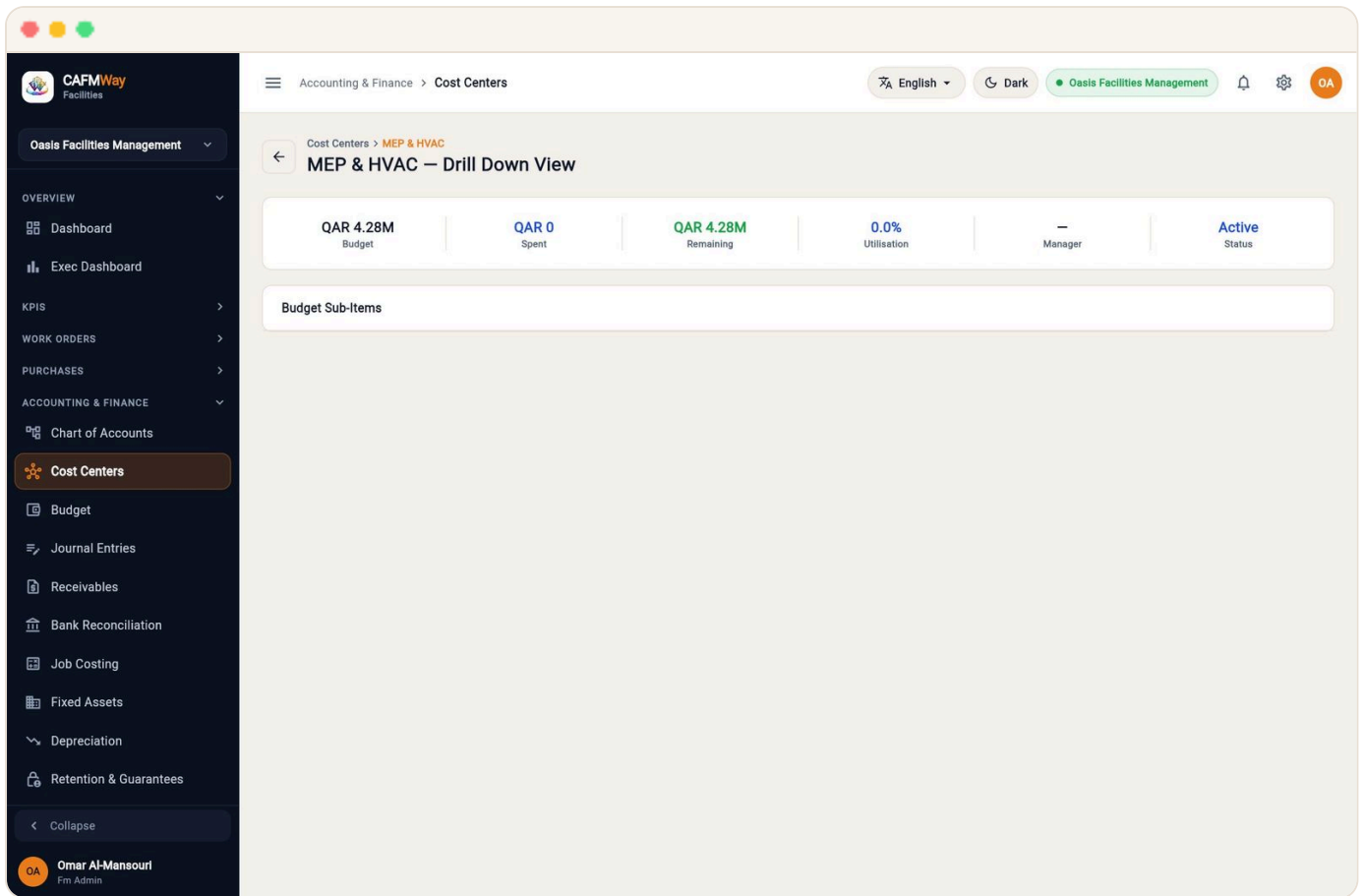


Figure 173 The drill-down view for the MEP & HVAC cost centre

NOTE

The **Transactions** button is not available yet. A centre you create here has no budget allocation or manager until one is linked to it, so it shows QAR 0 budget.

Budget and budget adjustments

Who: Budget read access to view and request; Budget write access to approve or reject
Where: Sidebar → ACCOUNTING & FINANCE → **Budget**

The **Budget Management** page tracks the year's facilities budget by category and by month, and compares it with actual spend. Actual spend counts goods received on purchase orders, materials issued from stores and approved supplier invoices. Purchase orders that are not yet received count as committed, not actual.

The tiles at the top show the total budget, actual spend to date, what remains and how many lines are over budget. Below them are **Budget by Category**, **Monthly Spend vs Budget** and **Variance Analysis**. Use **Q1**, **Q2**, **H1** or **YTD** to change the period.

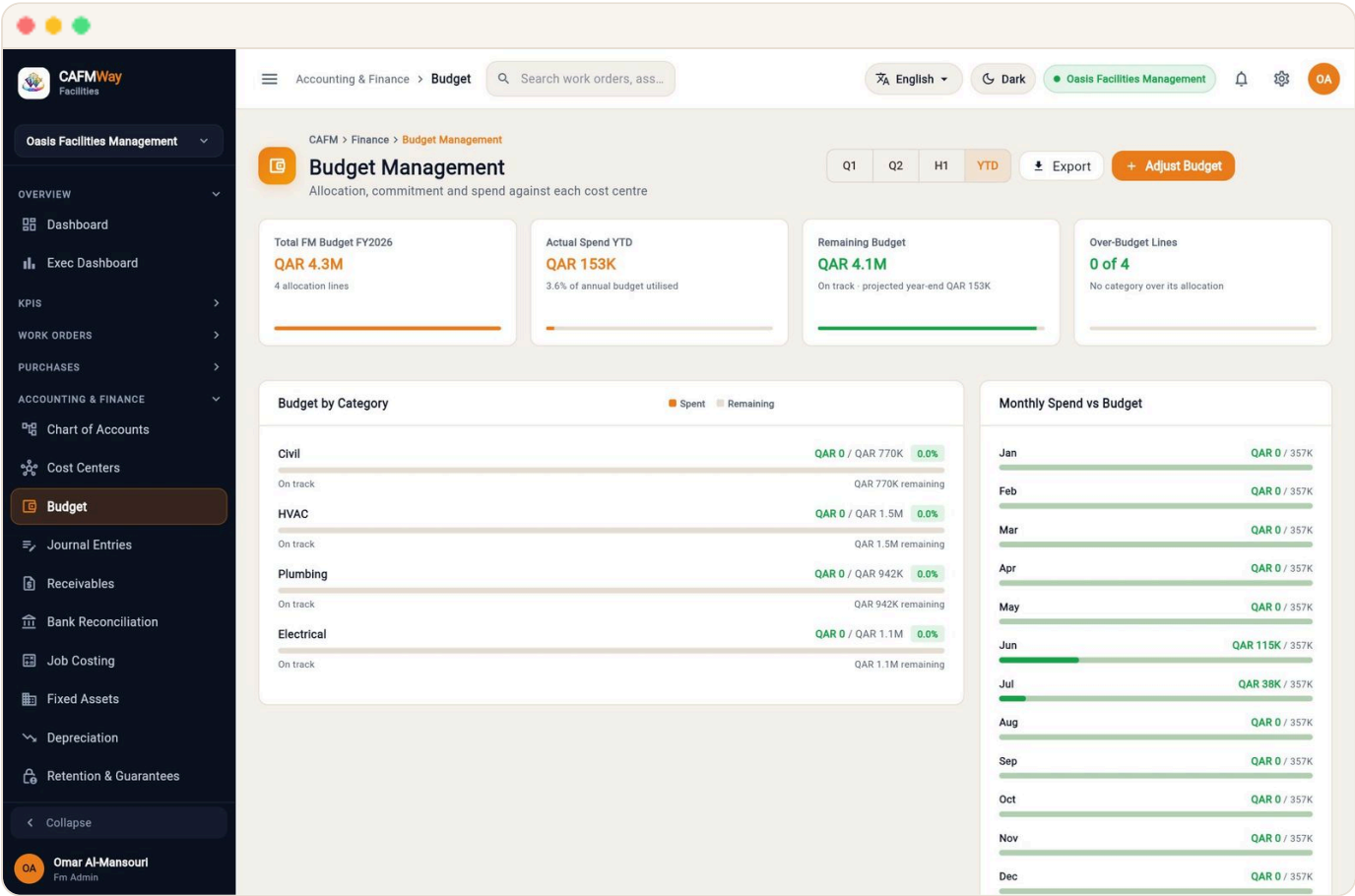


Figure 174 The budget page for FY2026 with 4.3M allocated across four categories

Request an adjustment

- 1 Click **Adjust Budget**.

- 2 Choose the **Adjustment Type: Reallocation** moves money between categories; **Budget Increase Request** and **Emergency Approval** raise the total.
- 3 For a reallocation, choose **From Category** and **To Category**.
- 4 Enter the **Amount (QAR)** and a **Justification**.
- 5 Click **Submit Request**. Nothing changes until the request is approved.

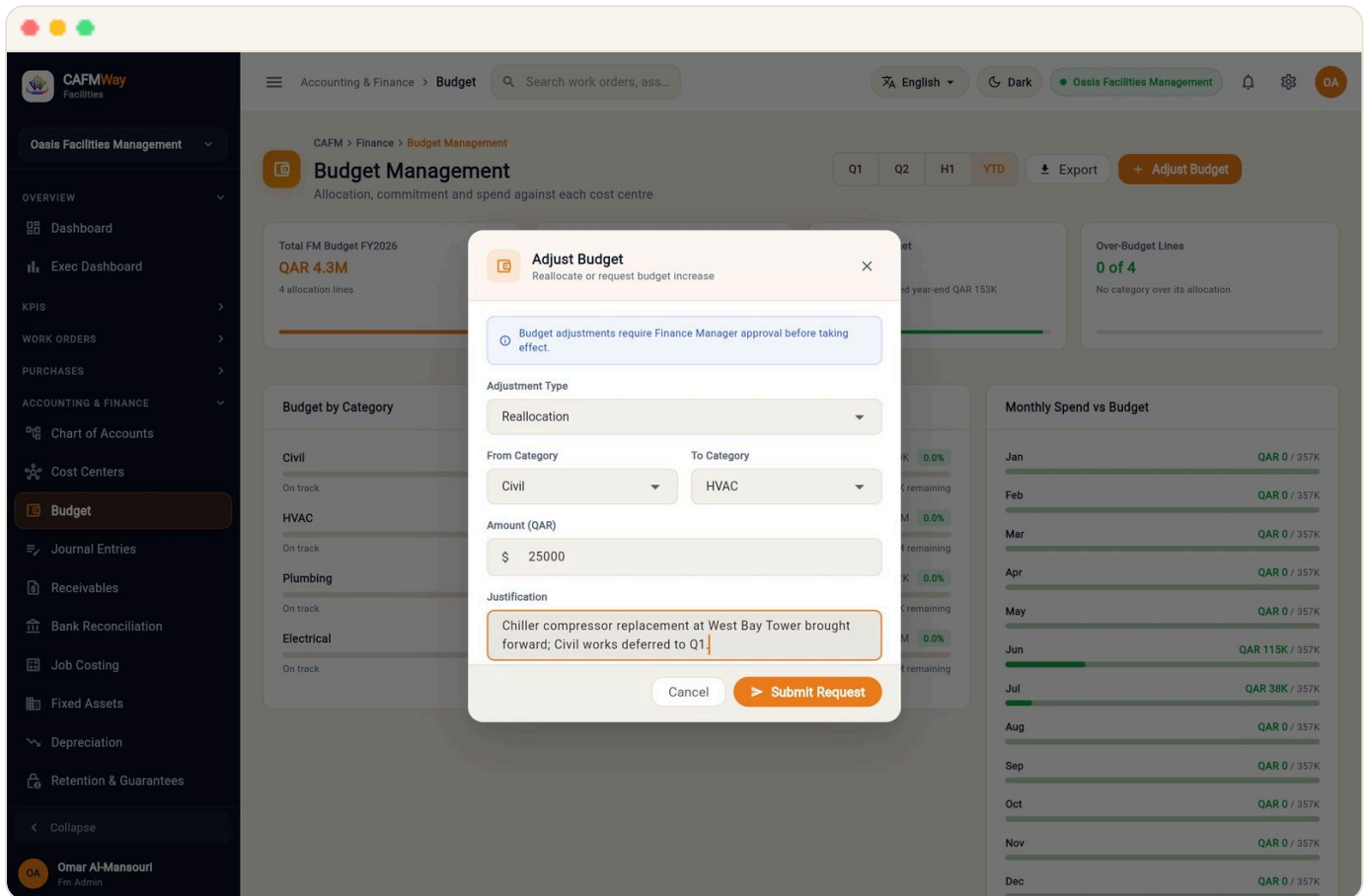


Figure 175 A reallocation of QAR 25,000 from Civil to HVAC, with its justification

Approve or reject an adjustment

- 1 Scroll to **Budget Adjustments**. Pending requests show a **PENDING** badge.
- 2 Click **Approve** or **Reject** on the request.

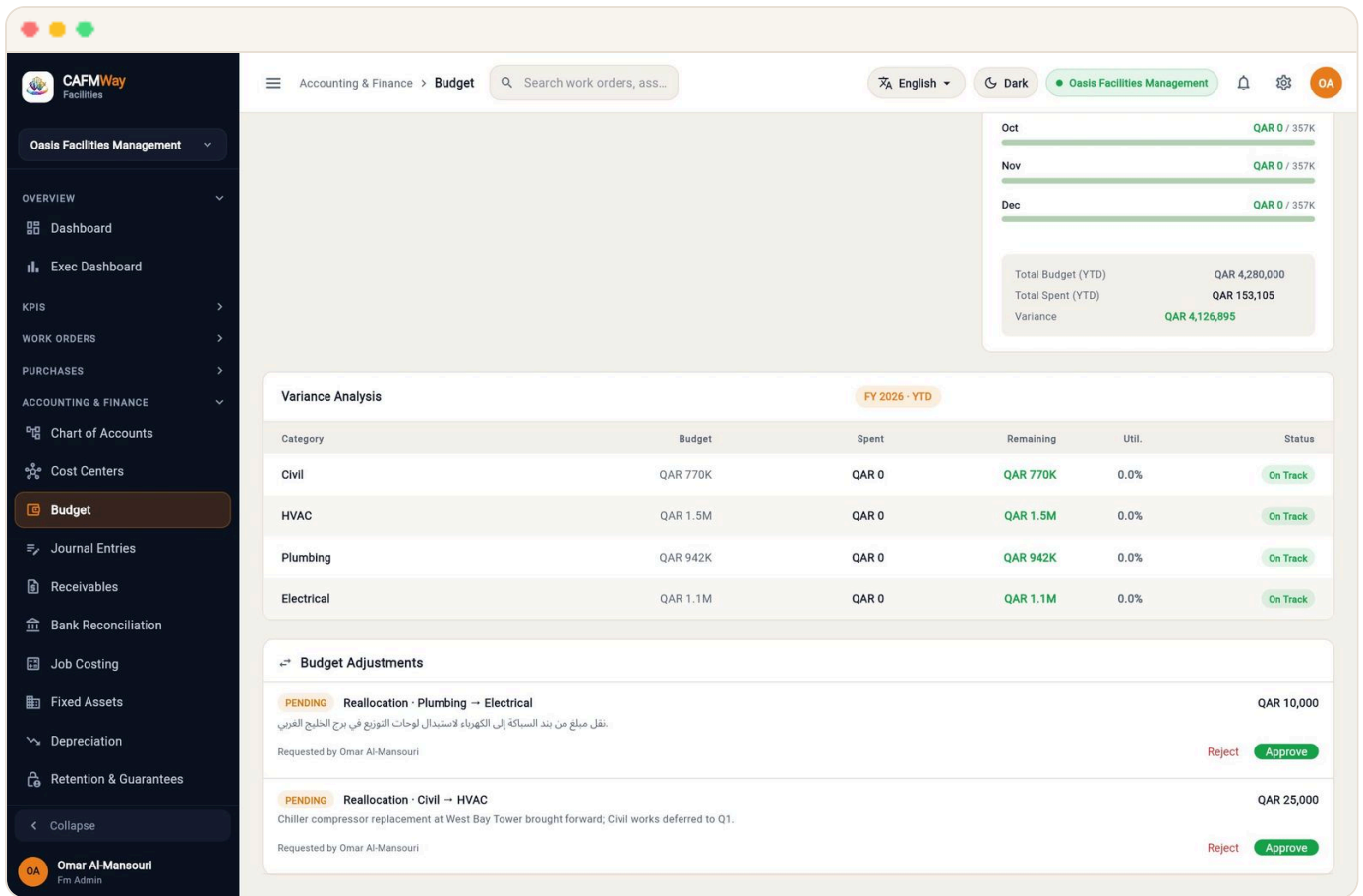


Figure 176 Two pending budget adjustments waiting for a decision

When you approve a reallocation, the amount moves between the two categories straight away. In the example, Civil drops from QAR 770K to QAR 745K and the request shows **APPROVED** with the approver's name.

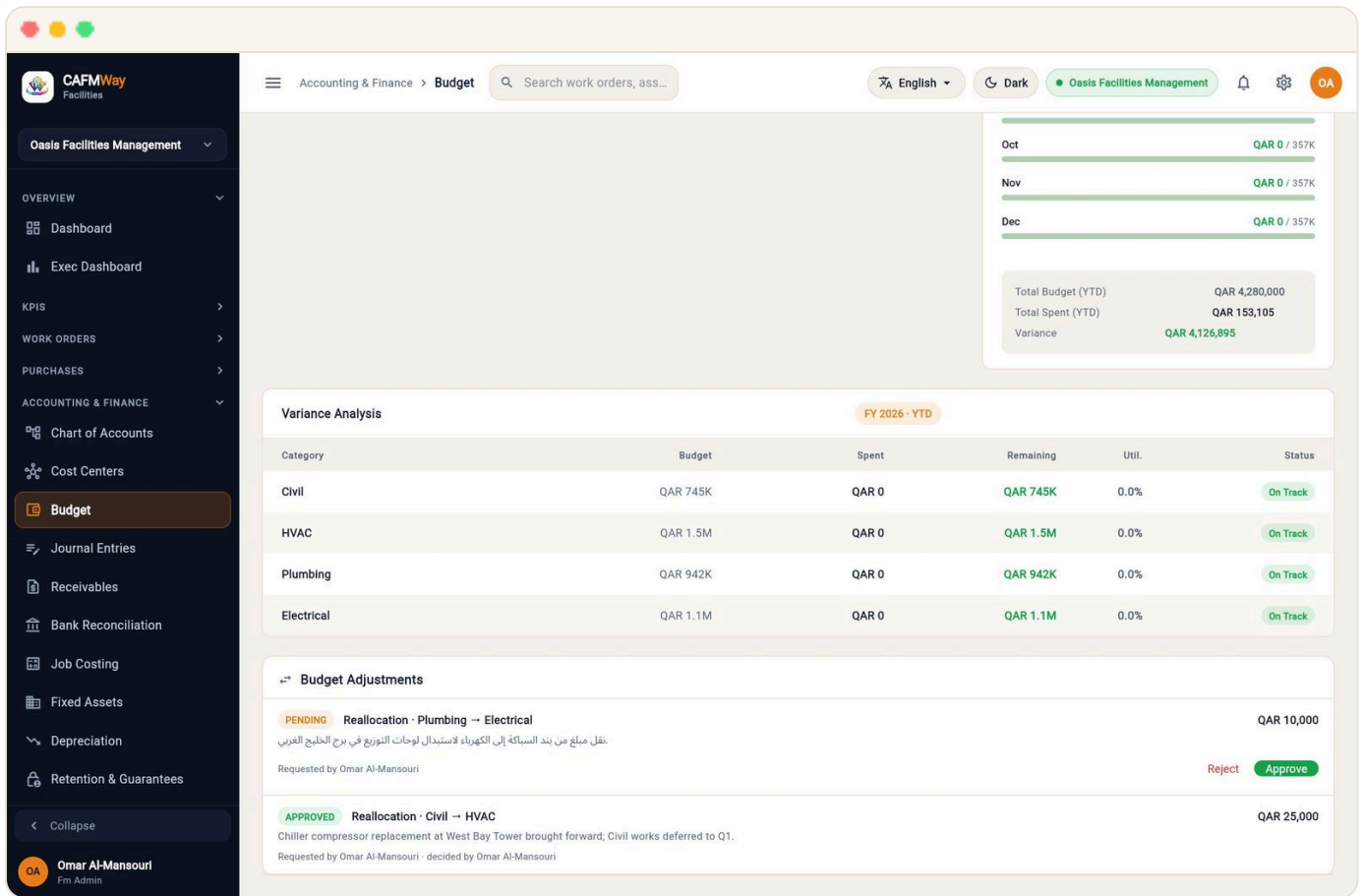


Figure 177 The approved reallocation and the reduced Civil budget in the variance table

CAUTION

Approve acts immediately, without a confirmation step. Check the amount and the categories before you click.

NOTE

Alerts are sent once when a category reaches 80%, 90% and 100% of its budget. A new budget year is set up by your administrator; there is no screen to create a budget from scratch.

Journal entries: draft, post and reverse

Who: Journal Entry create (new draft), write (edit a draft) and submit (post or reverse)

Where: Sidebar → ACCOUNTING & FINANCE → **Journal Entries**

Use a journal entry only for what no other document produces: opening balances, accruals, reclassifications and corrections. The editor shows a live balance, so you see whether the entry balances before anything reaches the ledger.

Post the opening balances

- 1 Click **New Entry**. The **New Journal Entry** editor opens with a **Draft** badge.
- 2 Set the **Posting date** to the first day of your first open month, for example 01/01/2026.
- 3 Set **Entry type** to **Opening balance** and keep **Currency** at QAR.
- 4 Enter a **Narration** that says what the entry is for.
- 5 For each line, choose the account in **Select account** and type the amount in **Debit** or **Credit**. Click **Add line** for more lines.
- 6 Watch the badge in the bottom-left corner. It reads **Balanced** when debits equal credits, or tells you how far out the entry is.
- 7 Click **Save draft** to keep it for later, or **Submit & Post** to post it now.

New Journal Entry Draft

Nothing is posted until you submit.

Posting date: 01/01/2026 Entry type: Opening balance Currency: QAR Narration: g balances brought forward from the previous system at 1 January 2026

#	ACCOUNT	DIMENSIONS	DEBIT	CREDIT
1	1111 Main Bank Account – QAR	Department: — Contract: — Work order: — Building: —	850000	Credit
2	1113 Petty Cash	Department: — Contract: — Work order: — Building: —	15000	Credit
3	3100 Share Capital	Department: — Contract: — Work order: — Building: —	Debit	500000
4	3200 Retained Earnings	Department: — Contract: — Work order: — Building: —	Debit	365000
TOTALS			865,000.00	865,000.00

[+ Add line](#)

Balanced Cancel Save draft Submit & Post

Figure 178 An opening-balance entry for bank, petty cash, share capital and retained earnings, balanced at 865,000.00

EXAMPLE

Opening balances, JE-2026-00001, 01/01/2026

Account	Debit (QAR)	Credit (QAR)
1111 Main Bank Account — QAR	850,000.00	
1113 Petty Cash	15,000.00	
3100 Share Capital		500,000.00
3200 Retained Earnings		365,000.00
Total	865,000.00	865,000.00

When the entry posts, a message confirms the voucher number and the row's status changes to **Submitted**.

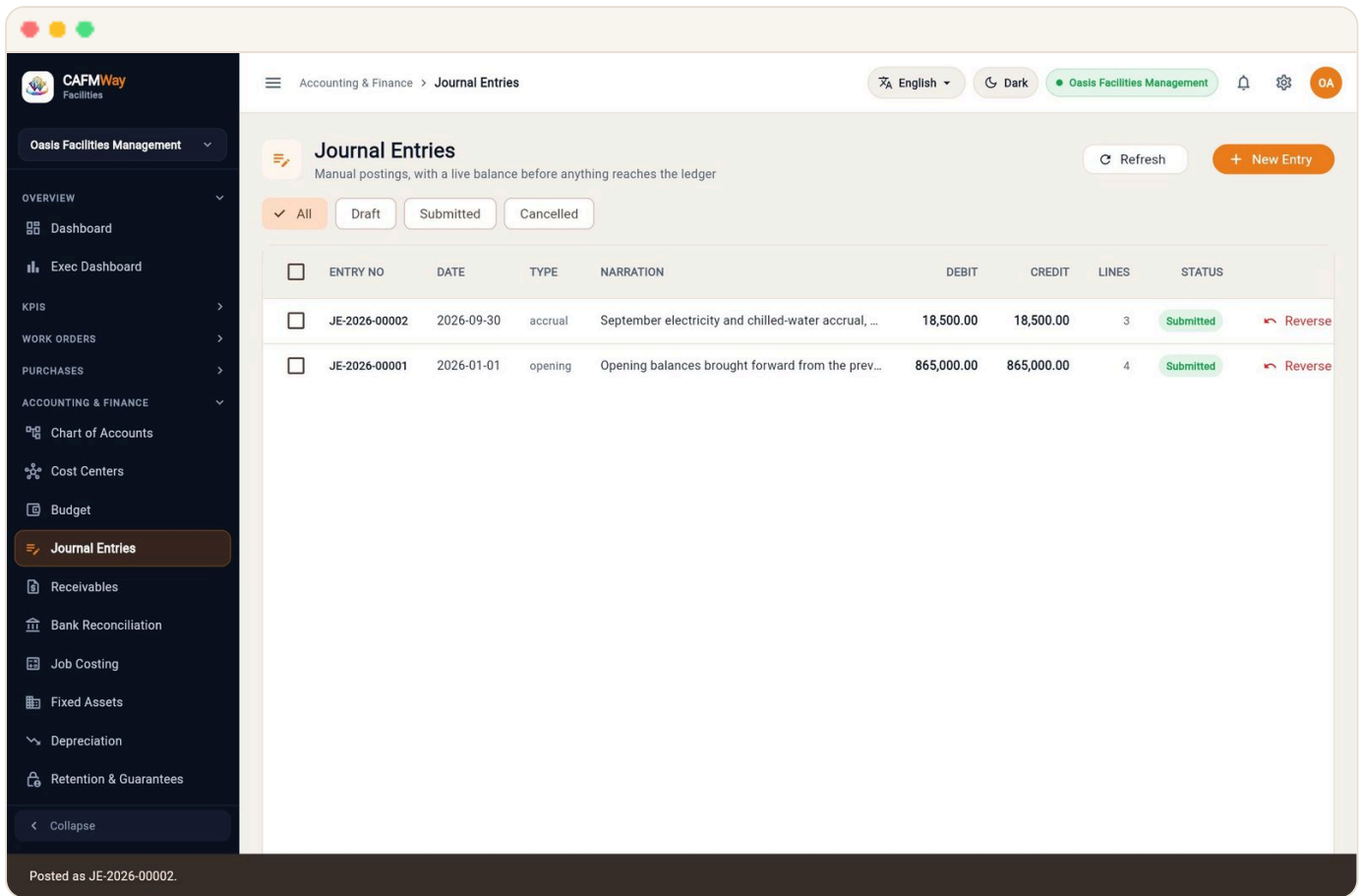


Figure 179 The confirmation "Posted as JE-2026-00002." after posting

Post an accrual that reverses itself

At month end you often know a cost but have no invoice yet. Accrue it, and let the entry reverse on the first day of the next month so the real invoice is not counted twice.

- 1 Click **New Entry** and set **Entry type** to **Accrual**.
- 2 Set the **Posting date** to the last day of the month.
- 3 Tick **Auto-reversing** and click **Reverse on...** to pick the reversal date. The button then shows the date, for example **Reverses 01/10/2026**.
- 4 Add the lines. When an account needs a dimension, its picker is marked with an asterisk, for example **Work order ***.
- 5 Click **Submit & Post**.

New Journal Entry (Draft)

Nothing is posted until you submit.

Posting date: 30/09/2026 Entry type: Accrual Currency: QAR Narration: city and chilled-water accrual, West Bay Tower, invoices not yet received

☒ Auto-reversing Reverses 01/10/2026

#	ACCOUNT	DIMENSIONS	DEBIT	CREDIT
1	6200 Rent and Utilities	Department: —, Contract: —, Work order: —, Building: —	12000	Credit
2	5300 Subcontractor Costs	Department: —, Contract: —, Work order: WO-CTR-0003, Building: —	6500	Credit
3	2140 Accrued Expenses	Department: —, Contract: —, Work order: —, Building: —	Debit	18500
TOTALS			18,500.00	18,500.00

+ Add line

☒ Balanced Cancel Save draft

Figure 180 A September utilities accrual with a subcontractor line tagged to work order WO-CTR-0003

EXAMPLE

Accrual, JE-2026-00002, 30/09/2026, reverses 01/10/2026

Account	Dimension	Debit (QAR)	Credit (QAR)
6200 Rent and Utilities		12,000.00	
5300 Subcontractor Costs	WO-CTR-0003	6,500.00	
2140 Accrued Expenses			18,500.00

Click any posted row to open it read-only. The header says the entry is posted and can only be corrected by a reversal.

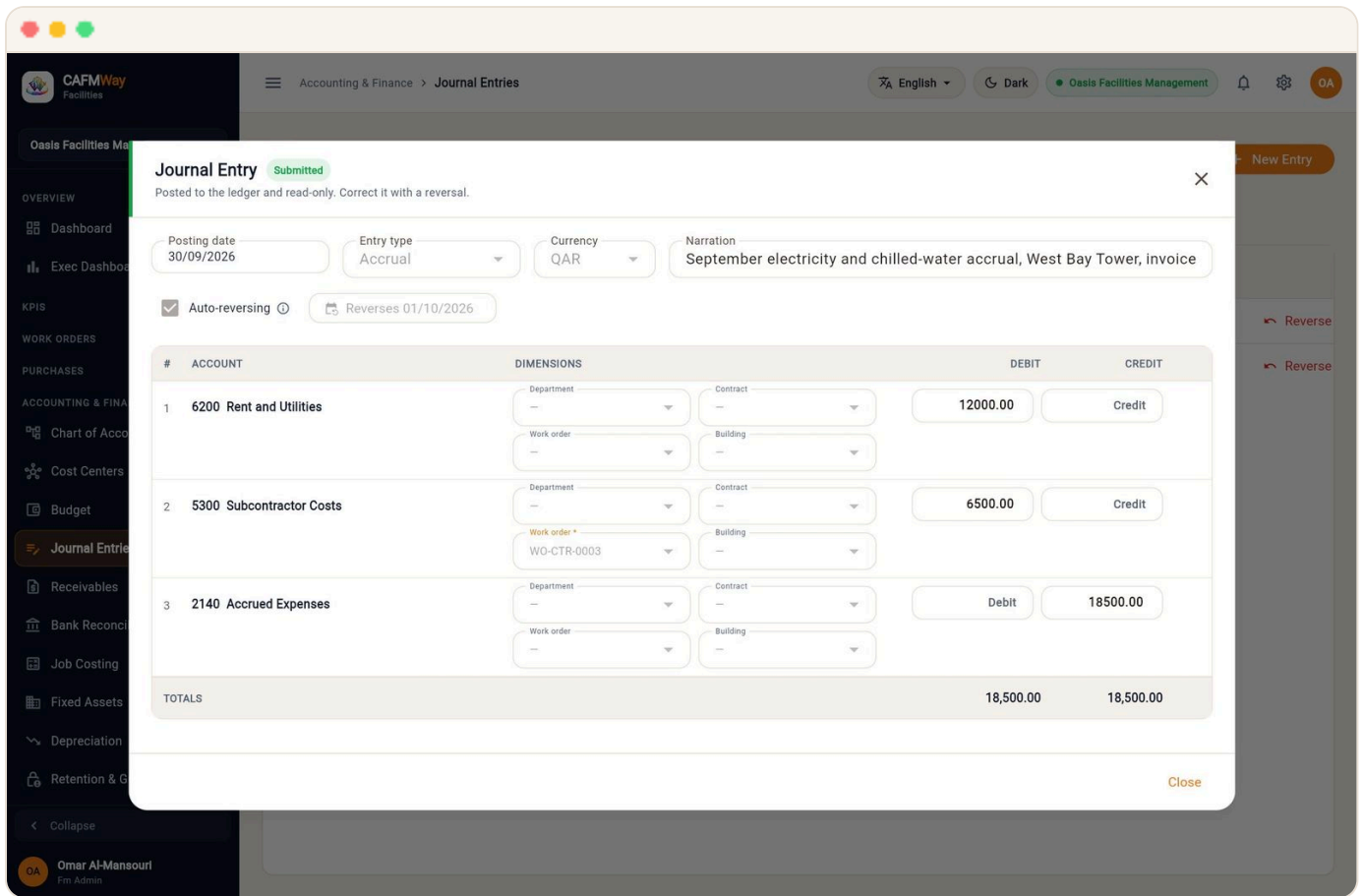


Figure 181 A posted accrual opened read-only

CAUTION

An accrual whose reversal date has passed blocks the period close (check 5) until it is reversed. Make sure your administrator runs the due reversals before closing the month.

When the ledger refuses an entry

If an entry breaks a rule, **Submit & Post** stops and the **Cannot post** dialog names the problem, the line it is on and how to fix it. The most common case is a manual journal to a control account.

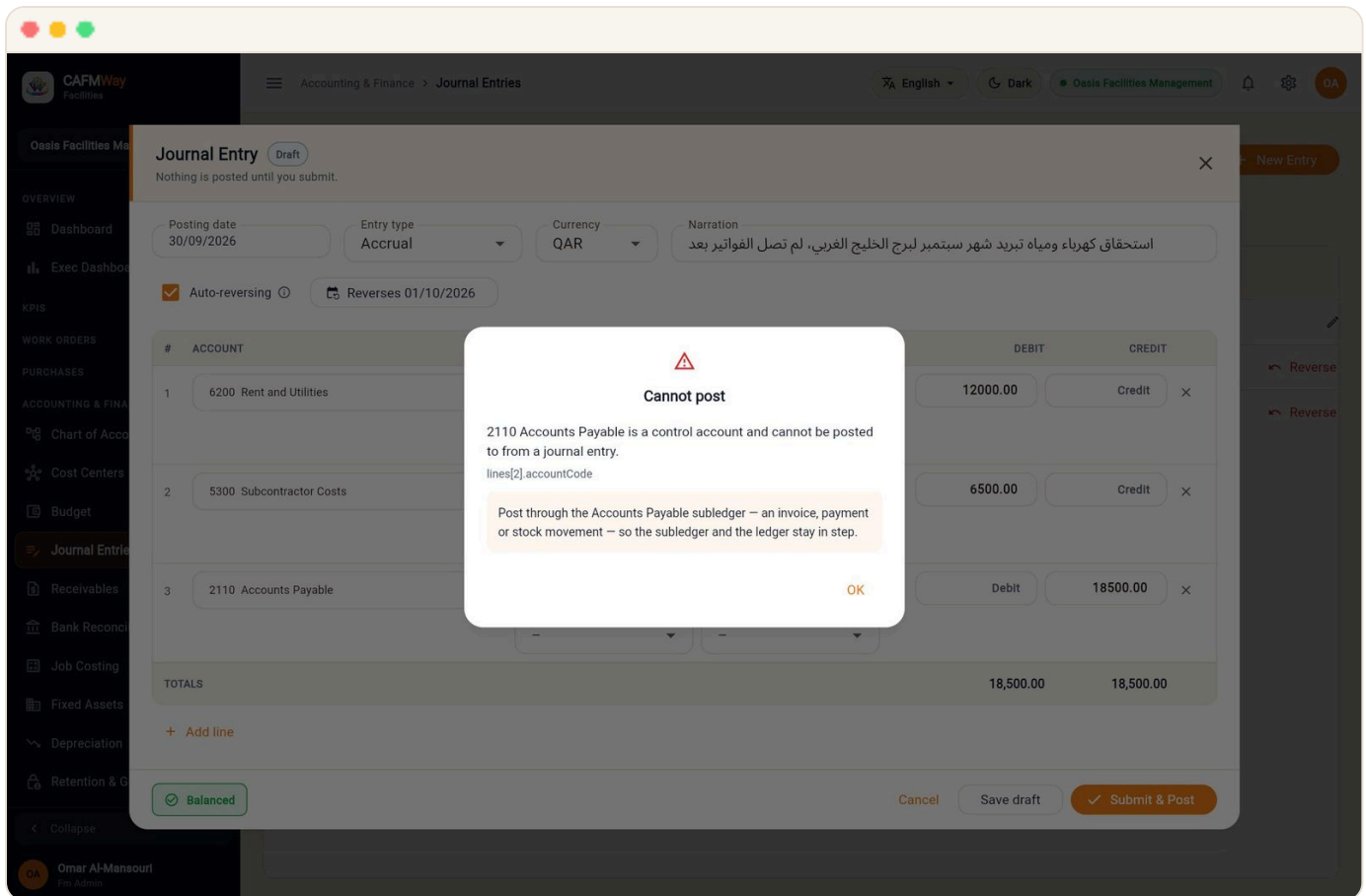


Figure 182 The ledger refusing a journal line to 2110 Accounts Payable, a control account

BUSINESS RULE

A journal is refused when it has fewer than two lines, has no narration, does not balance, uses a group or inactive account, misses a mandatory dimension, posts to a control account, or is dated in a closed or missing period. A manual journal can touch a control account only as an opening balance, and only before that account has any other postings.

Reverse a posted entry

You never edit a posted entry. To correct one, reverse it and post the right entry.

- 1 On the **Journal Entries** list, click **Reverse** on the row.
- 2 In the **Reason** box, say why it is being reversed.
- 3 Click **Post reversal**. A mirror-image voucher (numbered **REV-...**) is posted and the original shows **Cancelled**.
- 4 Post a new entry with the correct accounts.

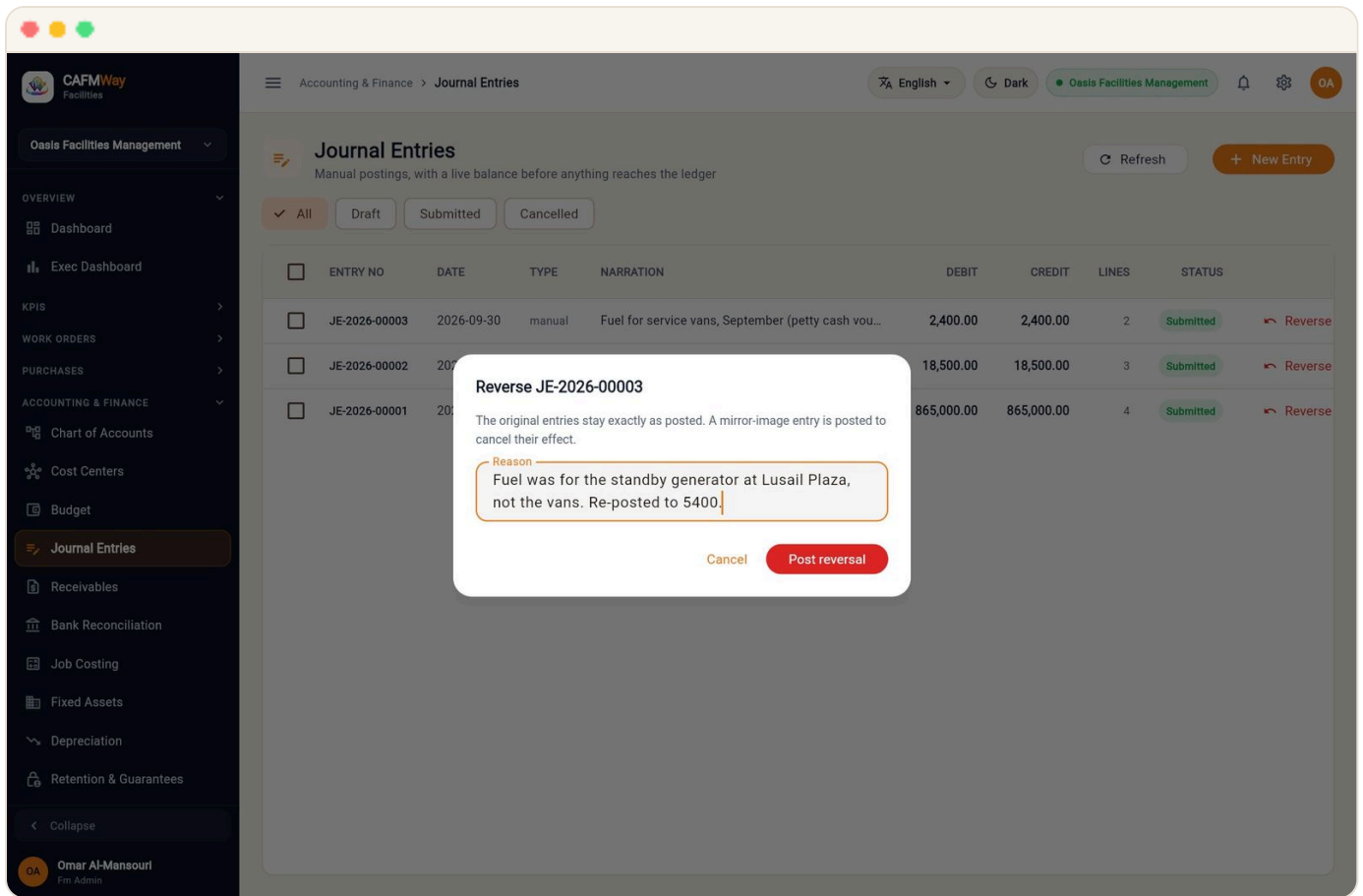


Figure 183 Reversing JE-2026-00003 with a reason

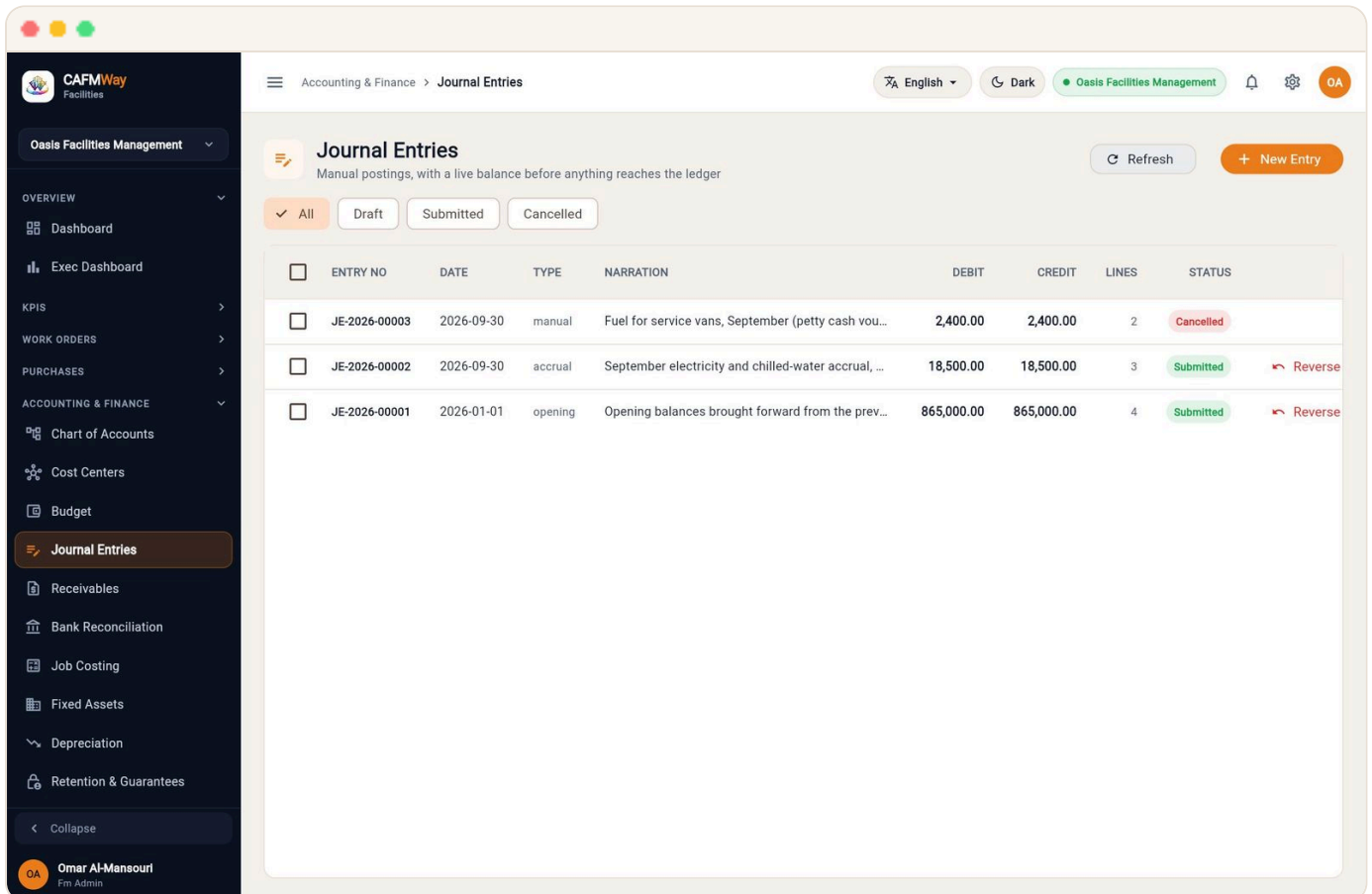


Figure 184 The list after the reversal: the corrected entry is Cancelled and the others remain Submitted

EXAMPLE

Correcting an entry posted to the wrong account

JE-2026-00003 charged generator fuel to **6300 Vehicle and Transport**. The reversal and the replacement entry look like this:

Voucher	Account	Debit (QAR)	Credit (QAR)
JE-2026-00003 (original)	6300 Vehicle and Transport	2,400.00	
	1113 Petty Cash		2,400.00
REV-2026-00001 (reversal)	6300 Vehicle and Transport		2,400.00
	1113 Petty Cash	2,400.00	
JE-2026-00004 (replacement)	5400 Equipment and Tool Hire	2,400.00	
	1113 Petty Cash		2,400.00

NOTE

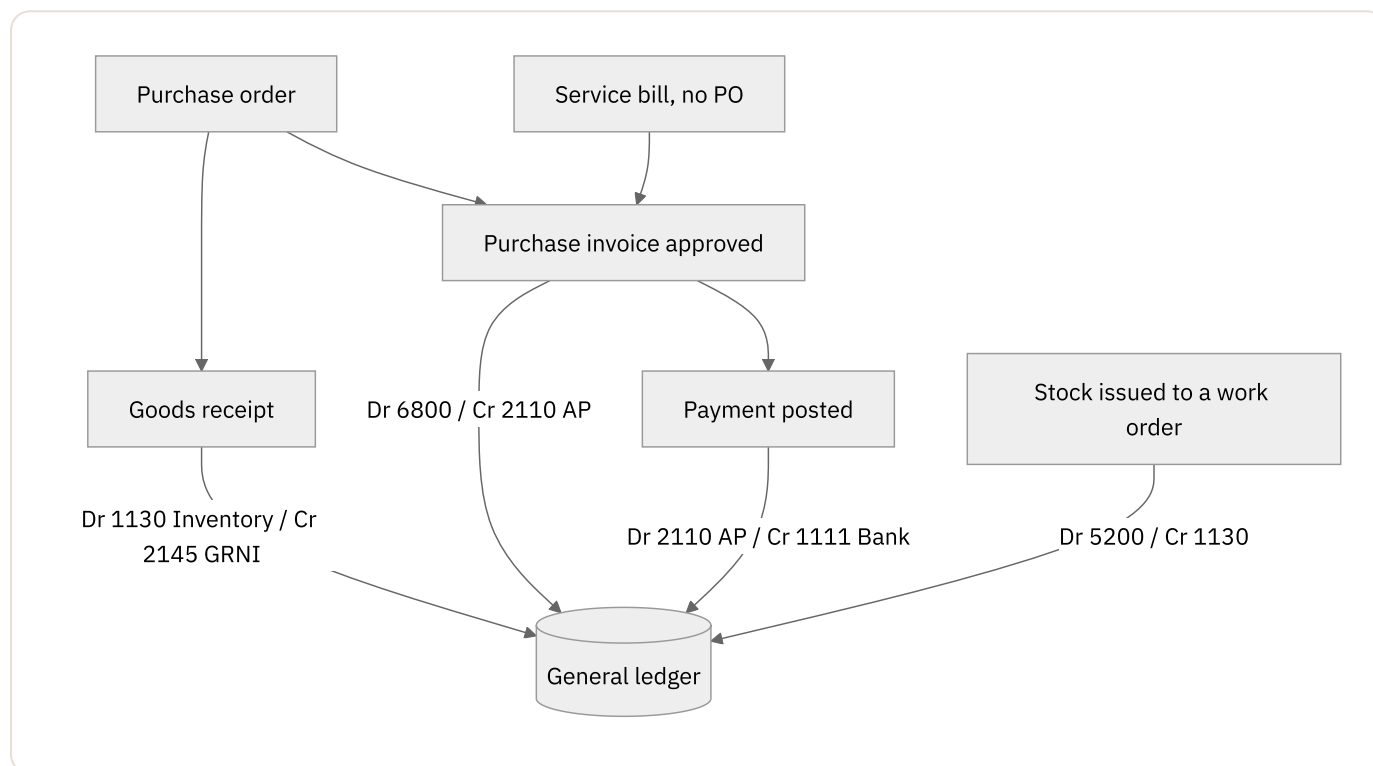
Use the filter chips **All**, **Draft**, **Submitted** and **Cancelled** to narrow the list. A draft stays editable (pencil icon) until you post it.

How operational documents reach the ledger

Who: the people who approve each document; finance reads the result in the General Ledger

Where: PURCHASES → **Purchase Invoice** and **Payment Entry**; INVENTORY stock entries;
ACCOUNTING & FINANCE → **Job Costing**

The purchasing and stores screens are described in their own parts of this guide. This section shows what each step writes to the ledger, so finance can follow a supplier bill from receipt to payment.



Purchase invoice approved

A purchase invoice posts when you click **Approve** on it in **Purchase Invoice**. It credits **2110 Accounts Payable** for the gross amount, with the supplier recorded as the party. The debits are:

- The net amount is debited to **6800 Other Administrative**. This is the case for service bills and, in the current version, also for invoices of goods received on a purchase order (goods receipts are not yet matched to invoices).
- Any VAT on the invoice is debited to **2160 VAT Payable**.

EXAMPLE

Service invoice PINV-2026-0009 from Gulf HVAC Supplies WLL, refrigerant recovery on Chiller No. 2, approved

Account	Party	Debit (QAR)	Credit (QAR)
6800 Other Administrative		4,800.00	
2110 Accounts Payable	Gulf HVAC Supplies WLL		4,800.00

EXAMPLE

Stock bought on purchase order PO-2026-0001 (goods QAR 5,340)

Step	Account	Debit (QAR)	Credit (QAR)
Goods receipt SE-2026-00005 submitted	1130 Inventory — Stores	5,340.00	
	2145 Goods Received Not Invoiced		5,340.00
Invoice PINV-2026-0010 approved	6800 Other Administrative	5,340.00	
	2110 Accounts Payable		5,340.00

CAUTION

Because the invoice does not clear **2145**, received stock ends up both in 1130 and in 6800, and 2145 keeps a credit balance. Until invoices are matched to goods receipts, finance should clear it at month end with a journal entry (Dr 2145, Cr 6800) for invoices of goods already received. Review 2145 in the General Ledger before closing a period.

Payment posted

A payment posts when you click **Post payment** in **Payment Entry**. It debits **2110 Accounts Payable** and credits the bank. If **Mode of payment** is **cash**, the credit goes to **1113 Petty Cash**; any other mode credits **1111 Main Bank Account — QAR**. Each invoice it is allocated to has its outstanding amount reduced, and becomes **Paid** at zero.

EXAMPLE

Payment PE-2026-0001 by bank transfer TRF-2026-09-0418, settling PINV-2026-0009

Account	Party	Debit (QAR)	Credit (QAR)
2110 Accounts Payable	Gulf HVAC Supplies WLL	4,800.00	
1111 Main Bank Account — QAR			4,800.00

Filter the General Ledger on **2110 Accounts Payable** to see both sides: the invoice credit and the payment debit that clears it.

The screenshot shows the 'General Ledger' interface with the following details:

- Account:** 2110 Accounts Payable
- Department:** All
- Contract:** All
- Asset:** All
- Filters:** All dates, Clear
- Summary:** DEBIT 4,800.00 QAR, CREDIT 4,800.00 QAR, Refresh
- Table:**

DATE	VOUCHER	TYPE	ACCOUNT	DIMENSIONS	REMARKS	DEBIT	CREDIT
2026-09-26	PAYM-20260926100002791	payment entry	2110 Accounts Payable	—	Settling PINV-2026-0009	4,800.00	—
2026-09-26	PURC-20260926095821136	purchase invoice	2110 Accounts Payable	—	Gulf HVAC Supplies WLL	—	4,800.00

Figure 185 The General Ledger filtered on 2110 Accounts Payable, showing the invoice and the payment

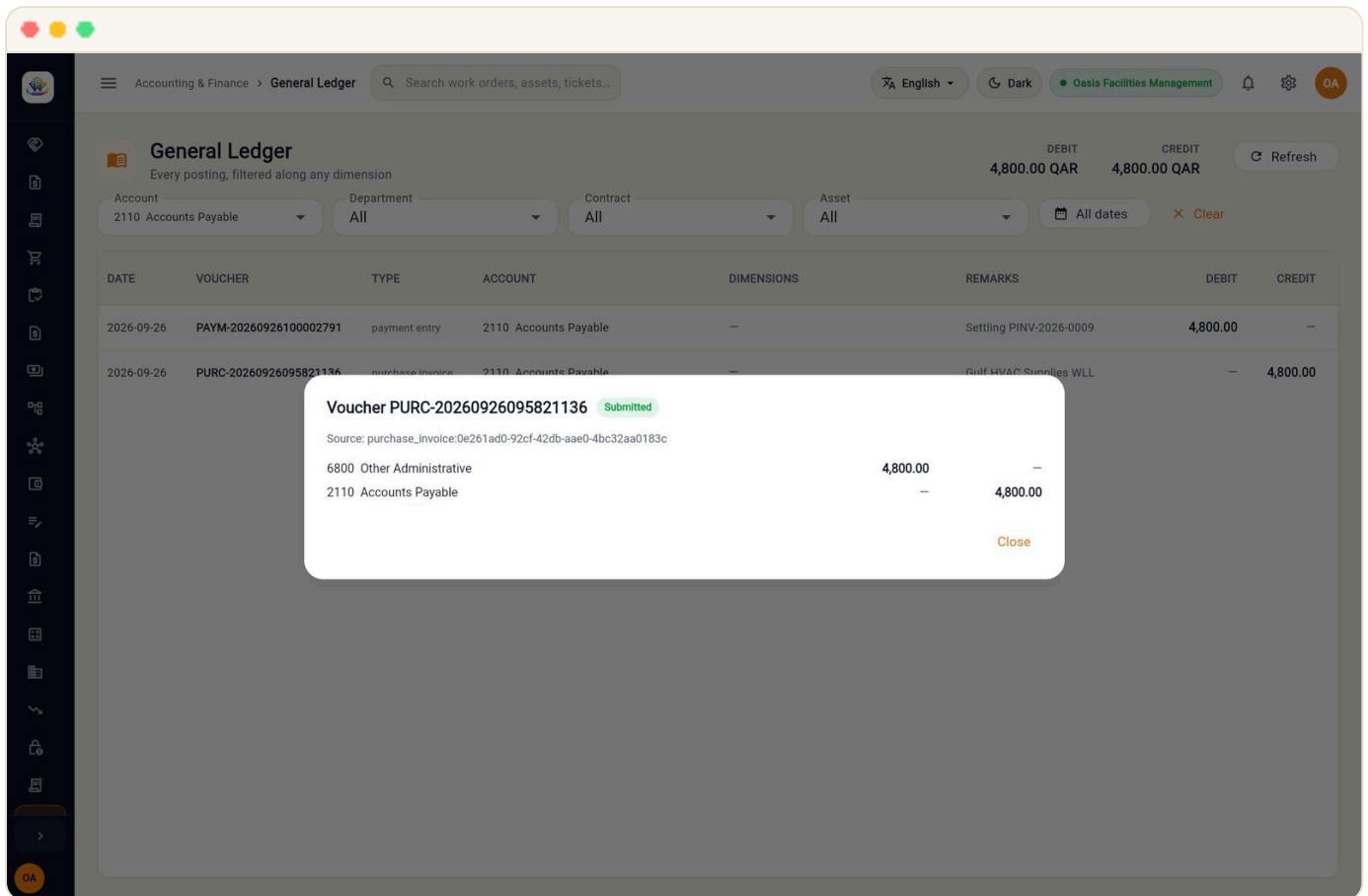


Figure 186 The purchase invoice voucher: Dr 6800 Other Administrative, Cr 2110 Accounts Payable

CAUTION

Cancelling an approved invoice or a posted payment does not reverse its ledger entry. The payables sub-ledger and the ledger then disagree, and period-close check 8 (subledger tie-out) shows the difference. Settle mistakes with the supplier through a new document instead of cancelling a posted one.

Stock movements

Every submitted stock entry posts at the value of the stock moved:

Stock entry type	Debit	Credit
Opening stock	1130 Inventory — Stores	3200 Retained Earnings
Receipt against a purchase order	1130 Inventory — Stores	2145 Goods Received Not Invoiced
Issue to a work order	5200 Materials and Parts Consumed (work order)	1130 Inventory — Stores
Return from a work order	1130 Inventory — Stores	5200 Materials and Parts Consumed
Write-off	6820 Stock Write-Off	1130 Inventory — Stores
Count adjustment, gain	1130 Inventory — Stores	6810 Stock Count Adjustment
Count adjustment, loss	6810 Stock Count Adjustment	1130 Inventory — Stores
Rotable sent for repair	1136 Rotables — Repair in Progress	1130 Inventory — Stores
Transfer between stores	no ledger entry (same account)	

EXAMPLE

Opening stock SE-2026-00001, main store

Account	Debit (QAR)	Credit (QAR)
1130 Inventory — Stores	8,389.00	
3200 Retained Earnings		8,389.00

Materials issued to a work order are also written to that work order's cost, so they appear in **Job Costing** without further action.

Work order labour: job costing

- **Who:** Journal Entry report access
- **Where:** Sidebar → ACCOUNTING & FINANCE → **Job Costing**

Labour is costed from the time technicians log on a work order, at the hourly cost rate of their job title (the seeded rate cards are Technician 55, First Technician 85 and Supervisor 120 QAR per hour).

- 1 Open **Job Costing**. The banner shows how many completed work orders are **not yet costed**.
- 2 Filter with **Work order number or title...** or pick a **Contract**.
- 3 Scroll the table to the right and click **Cost** on a work order. The labour is posted and the row fills in its **LABOUR**, **MATERIAL**, **SUBCONTRACT**, **OTHER** and **TOTAL** columns.
- 4 Click a row to see the cost breakdown: actual against estimate, how each cost was calculated and the ledger postings.

The screenshot displays the 'Job Costing' section of the CAFMWay web application. The interface includes a sidebar with navigation options like 'Contractors', 'Request for Quotation', 'Supplier Quotation', 'Purchase Order', 'Goods Receipt', 'Purchase Invoice', 'Payment Entry', 'Chart of Accounts', 'Cost Centers', 'Budget', 'Journal Entries', 'Receivables', 'Bank Reconciliation', 'Job Costing', 'Fixed Assets', and 'Depreciation'. The main content area shows a table of work orders with columns: WORK ORDER, ASSET / CONTRACT, STATUS, LABOUR, MATERIAL, SUBCONTRACT, OTHER, and TOTAL. The table lists nine work orders, all with a total cost of 0.00 QAR. The status of the work orders is 'In progress' for the first three and 'Completed' for the remaining six. A banner at the top right indicates '9 work order(s) not yet costed'.

WORK ORDER	ASSET / CONTRACT	STATUS	LABOUR	MATERIAL	SUBCONTRACT	OTHER	TOTAL
WO-CTR-0006 HVAC – callback, fault recurred	CT-2026-8036	In progress	–	–	–	–	0.00
WO-CTR-0003 HVAC – callback, fault recurred	CT-2026-6897	In progress	–	–	–	–	0.00
WO-CTR-0009 Fire Safety – callback, fault recurred	CT-2026-7292	In progress	–	–	–	–	0.00
WO-CTR-0008 Fire Safety – unit fault reported	CT-2026-7292	Completed	–	–	–	–	0.00
WO-CTR-0005 HVAC – unit fault reported	CT-2026-8036	Completed	–	–	–	–	0.00
WO-CTR-0002 HVAC – unit fault reported	CT-2026-6897	Completed	–	–	–	–	0.00
WO-CTR-0001 HVAC – planned service visit	CT-2026-6897	Completed	–	–	–	–	0.00
WO-CTR-0004 HVAC – planned service visit	CT-2026-8036	Completed	–	–	–	–	0.00
WO-CTR-0007 Fire Safety – planned service visit	CT-2026-7292	Completed	–	–	–	–	0.00

Figure 187 Job Costing listing nine work orders not yet costed

EXAMPLE

Labour on work order WO-CTR-0001: a technician logged 90 minutes

Cost = $90 \div 60 \times 55.00 = 82.50$ QAR

Account	Dimension	Debit (QAR)	Credit (QAR)
5100 Direct Labour	WO-CTR-0001	82.50	
5190 Labour Cost Absorbed			82.50

BUSINESS RULE

Each time log is costed once; clicking **Cost** again does not post it twice. All minutes are costed at the normal rate, and a work order whose technician has no matching rate card cannot be costed.

CAUTION

Costing is not automatic. Period-close check 1 blocks the month while any work order completed in it has no cost at all, so cost your completed work orders before month end.

Contractor financials

Amounts owed to and paid to contractor companies are kept on the contractor's own account: PURCHASES → **Contractors** → open the contractor → **Financials**. The tab shows contract value, expenses, penalties raised by the SLA engine and the outstanding balance. Use **Add Entry** to record an expense, a payment or a credit note.

The screenshot shows the CAFMWay web application interface. The left sidebar contains a navigation menu with categories like Overview, Work Orders, Purchases, and Contractors. The main content area displays the 'Financials' tab for 'AI Noor HVAC Services'. At the top, there are summary cards for Contract Value (420,000 QAR), Expenses (105,000 QAR), Penalties (17,500 QAR), and Outstanding (24,500 QAR). Below these, a table lists individual financial entries, including penalties for SLA breaches and a payment against a quarterly invoice.

Type	Description	Date	Amount (QAR)
penalty	SLA response breach - HVAC - 2h 0m late	2026-09-25	1000.00
penalty	SLA resolution breach - HVAC - 26h 0m late	2026-09-25	12000.00
penalty	SLA resolution breach - HVAC - 9h 0m late	2026-09-23	4500.00
payment	Payment against quarterly invoice	2026-09-06	63000.00
expense	Quarterly maintenance invoice	2026-08-12	105000.00

Figure 188 The Financials tab for AI Noor HVAC Services with SLA penalties, a payment and a quarterly invoice

NOTE

Contractor financial entries and SLA penalties are a separate running account. They do not post to the general ledger. To put a contractor's bill in the ledger, record it as a purchase invoice from the matching supplier.

General ledger enquiry

Who: Journal Entry read access

Where: Sidebar → ACCOUNTING & FINANCE → **General Ledger**

The General Ledger lists every posting line, newest first, with its date, voucher, type, account, dimensions, remarks and amount. The totals at the top show the debits and credits of what is currently listed.

- 1 Filter with **Account**, **Department**, **Contract** and **Asset**, or pick a date range with **All dates**.
- 2 Click **Clear** to remove the filters.
- 3 Click a line to open its voucher. The voucher shows every line of the entry, the source document it came from and, if it was reversed, **Reversed by** and the reversal number.

The screenshot shows the 'General Ledger' interface. At the top, there are filters for Account (1113 Petty Cash), Department (All), Contract (All), and Asset (All). The date range is set to 'All dates'. The totals show a DEBIT of 17,400.00 QAR and a CREDIT of 4,800.00 QAR. The table below lists the transactions:

DATE	VOUCHER	TYPE	ACCOUNT	DIMENSIONS	REMARKS	DEBIT	CREDIT
2026-09-30	JE-2026-00004	journal entry	1113 Petty Cash	—		—	2,400.00
2026-09-30	JE-2026-00003	journal entry	1113 Petty Cash	—		—	2,400.00
2026-09-26	REV-2026-00001	journal entry	1113 Petty Cash	—	Reversal of JE-2026-00003: الوفود...	2,400.00	—
2026-01-01	JE-2026-00001	opening balance	1113 Petty Cash	—		15,000.00	—

Figure 189 The General Ledger filtered on 1113 Petty Cash, including a reversal

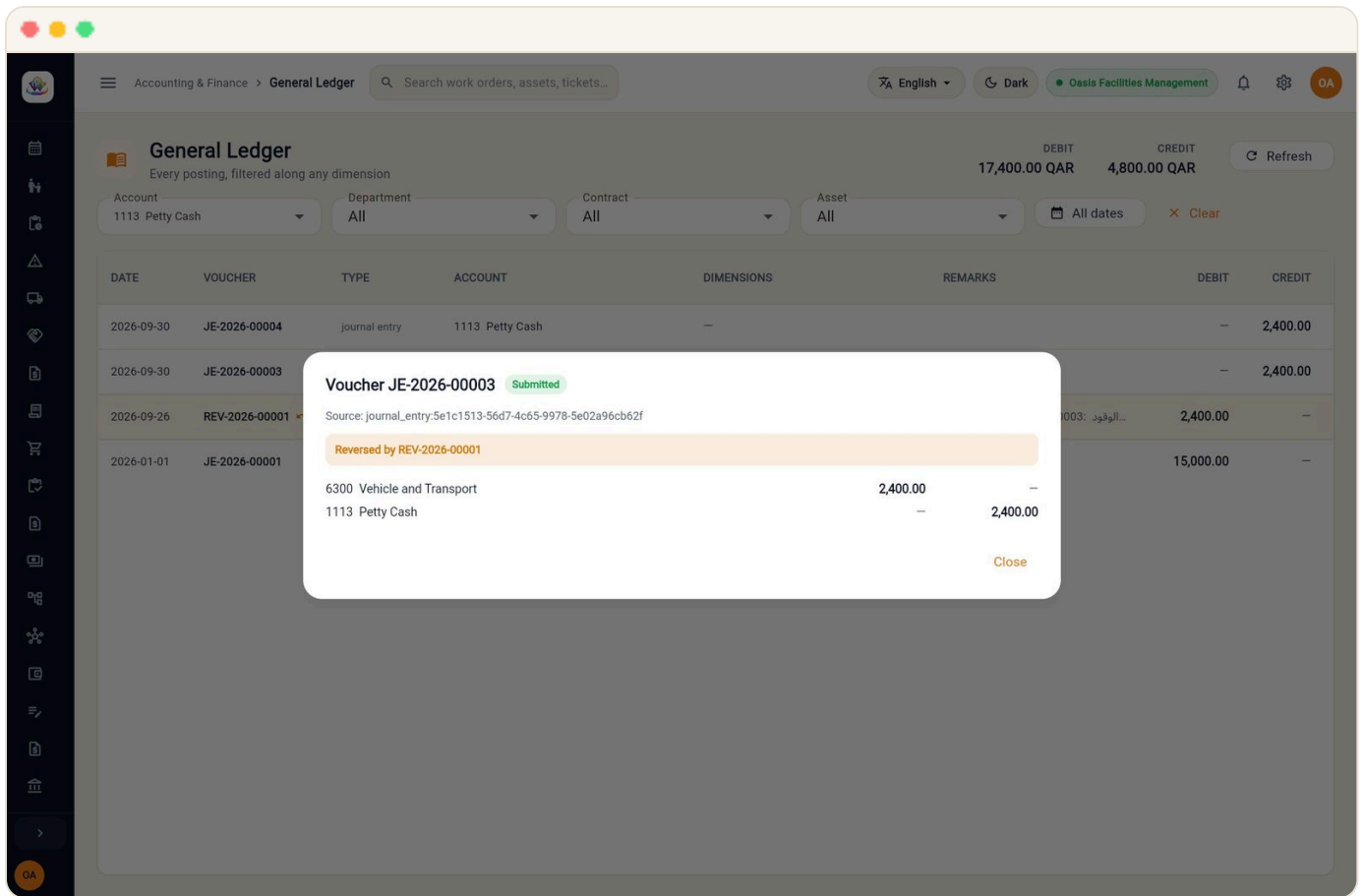


Figure 190 Voucher JE-2026-00003, reversed by REV-2026-00001

TIP

The table is wider than most screens. Scroll it sideways (shift + mouse wheel or a trackpad) to reach the **DEBIT** and **CREDIT** columns, or collapse the sidebar with the menu button.

Fixed assets and depreciation

Who: Journal Entry report access plus Company write access (FM Administrator)
Where: Sidebar → ACCOUNTING & FINANCE → **Depreciation** and **Fixed Assets**

The **Fixed Assets** register lists capitalised assets with their gross cost, accumulated depreciation and net book value. The **Depreciation** page shows the charges due up to a date and posts them.

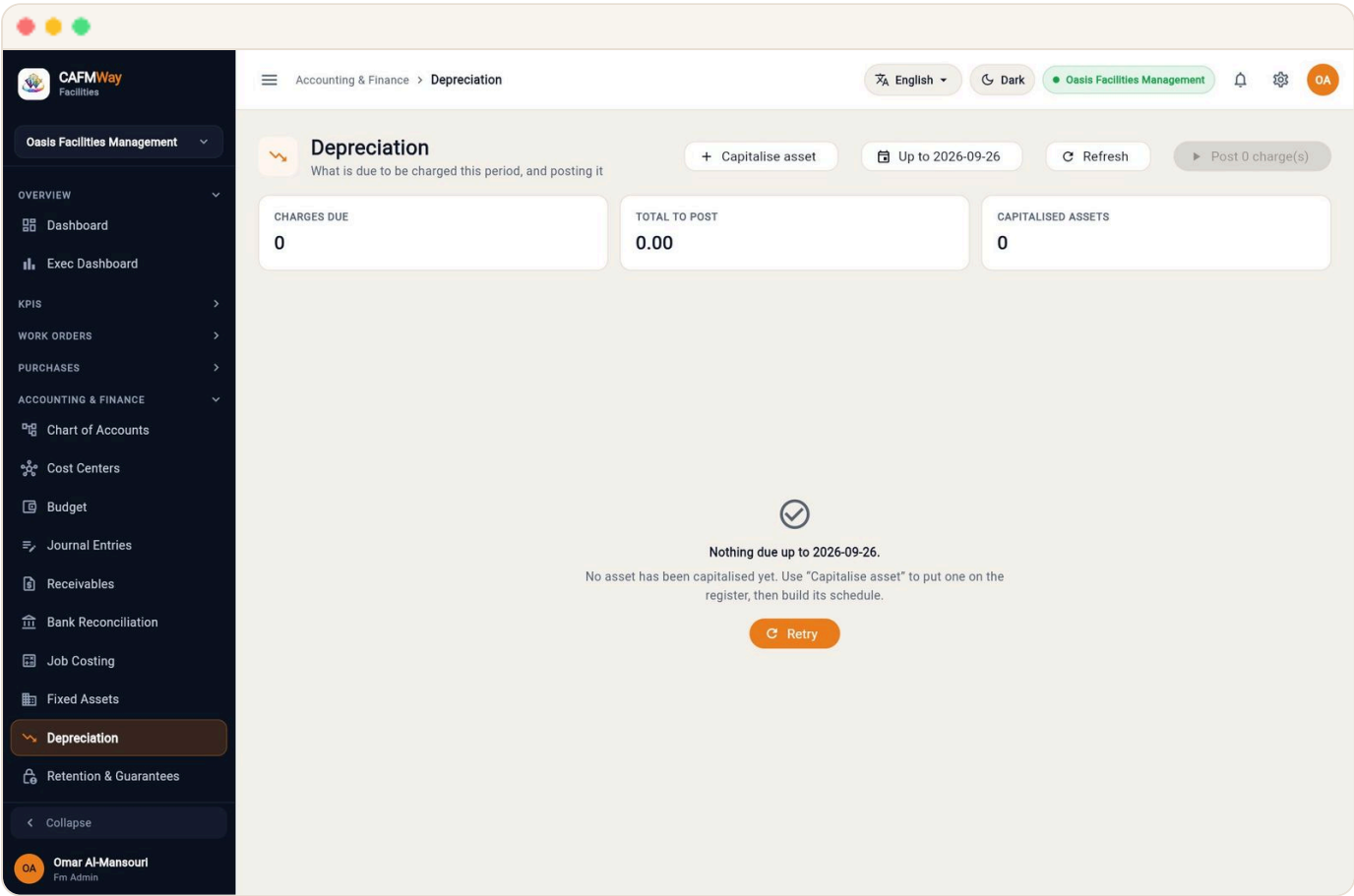


Figure 191 The Depreciation page with no charges due

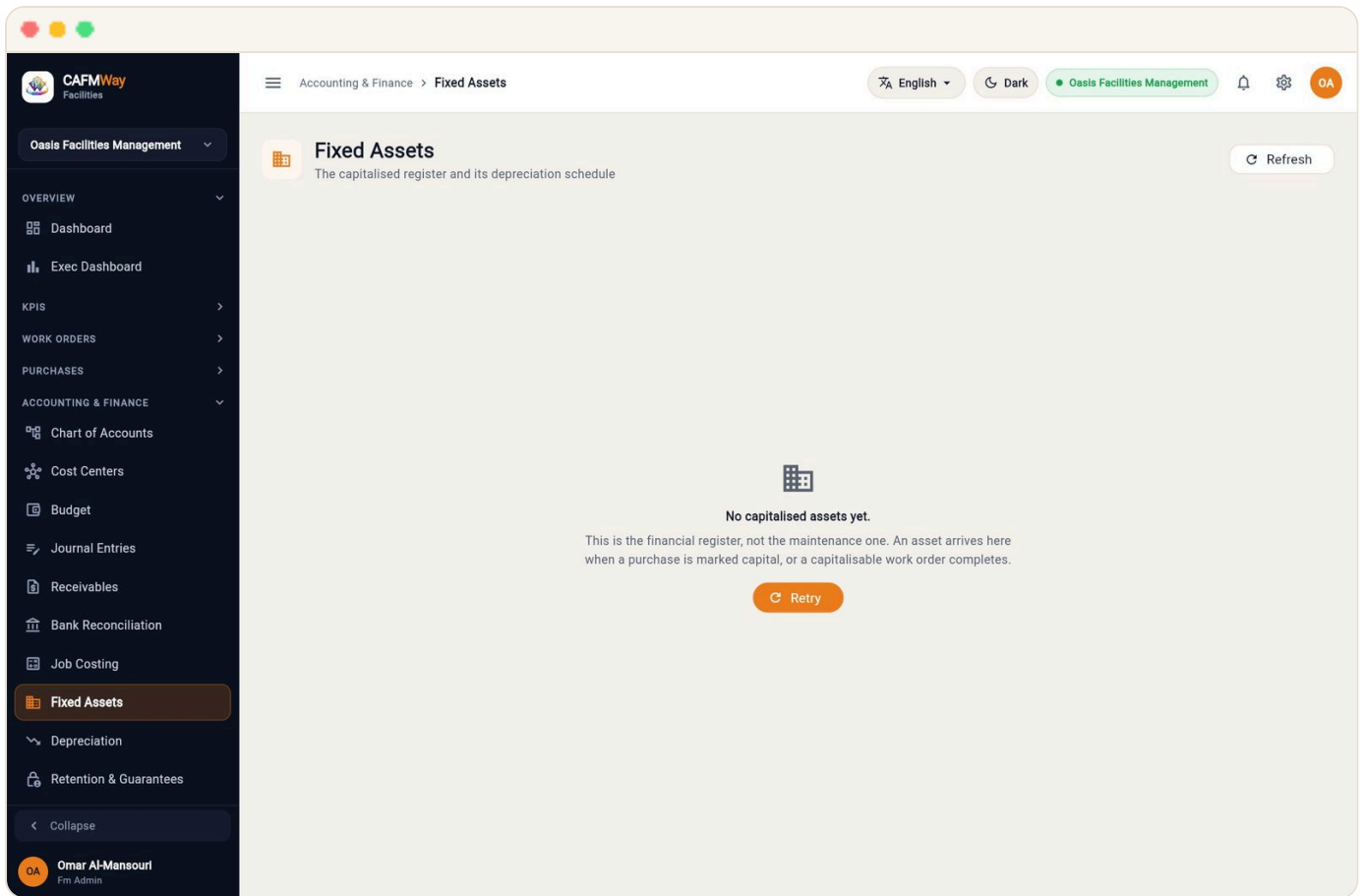


Figure 192 The Fixed Assets register, still empty

When assets are on the register, the Depreciation page lists every charge due up to the date on the **Up to** button, with the **CHARGES DUE** and **TOTAL TO POST** tiles above it.

- 1 Click the **Up to** button and choose the last day to charge, normally the month end.
- 2 Click **Post {n} charge(s)**.
- 3 In **Post the depreciation run?**, click **Post**. Each asset posts one voucher per month, dated to its own scheduled month. A charge that cannot post, for example into a closed month, is skipped and reported, and the rest still post.

EXAMPLE

Chiller No. 2: cost 180,000 QAR, residual 18,000 QAR, useful life 120 months, straight line

Monthly charge = $(180,000 - 18,000) \div 120 = 1,350.00$ QAR

Account	Debit (QAR)	Credit (QAR)
6400 Depreciation Expense	1,350.00	
1220 Accumulated Depreciation		1,350.00

NOTE

Adding an asset with **Capitalise asset** is not available yet, so the register and the depreciation run stay empty for now. Capitalising an asset will not post the purchase itself; that is posted by the supplier invoice.

Receivables

Who: Invoice access; receipts also need Payment Entry access

Where: Sidebar → ACCOUNTING & FINANCE → **Receivables**

Receivables holds customer invoices and receipts, on two tabs: **Invoices** and **Customers**. An invoice reaches the ledger when it is issued, not when it is drafted.

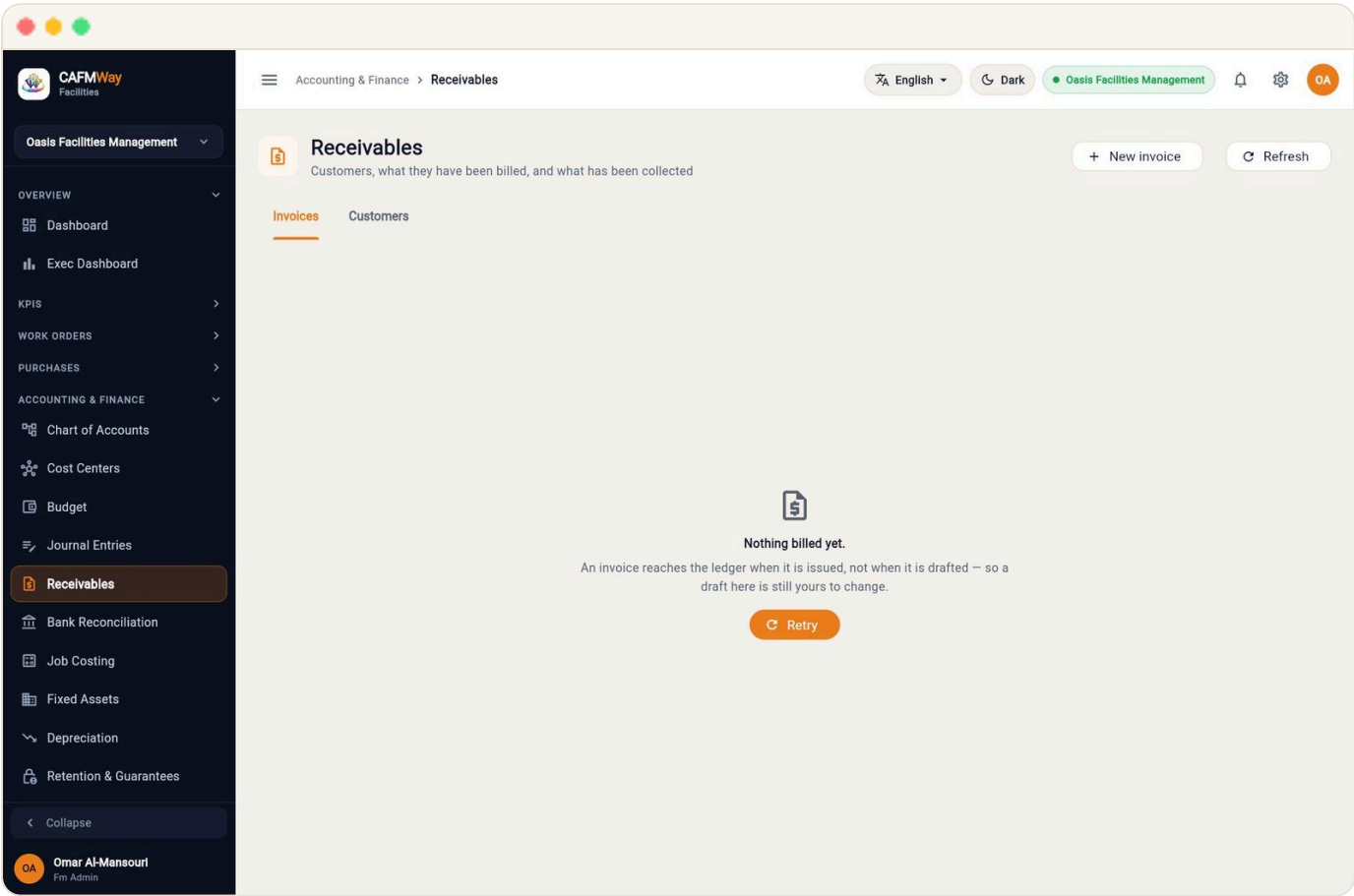


Figure 193 The Receivables page before any customer has been billed

EXAMPLE

What a customer invoice posts when issued: 100,000 QAR with 10% retention

Account	Debit (QAR)	Credit (QAR)
1120 Accounts Receivable	90,000.00	
1140 Retention Receivable	10,000.00	
4300 Project Revenue		100,000.00

A receipt then debits **1111** (or **1113** for cash) and credits **1120**. A credit note mirrors the invoice lines.

NOTE

Customers are added by your administrator; there is no screen to create one yet. Until a customer exists, **New invoice** shows "Add a customer before billing one."

Bank reconciliation

Who: Journal Entry read access to view; Company write access to import and sign off

Where: Sidebar → ACCOUNTING & FINANCE → **Bank Reconciliation**

The page shows the ledger balance of each bank and cash account and when it was last reconciled. Reconciliation matches the bank's statement lines to the postings already in the ledger. It posts nothing itself.

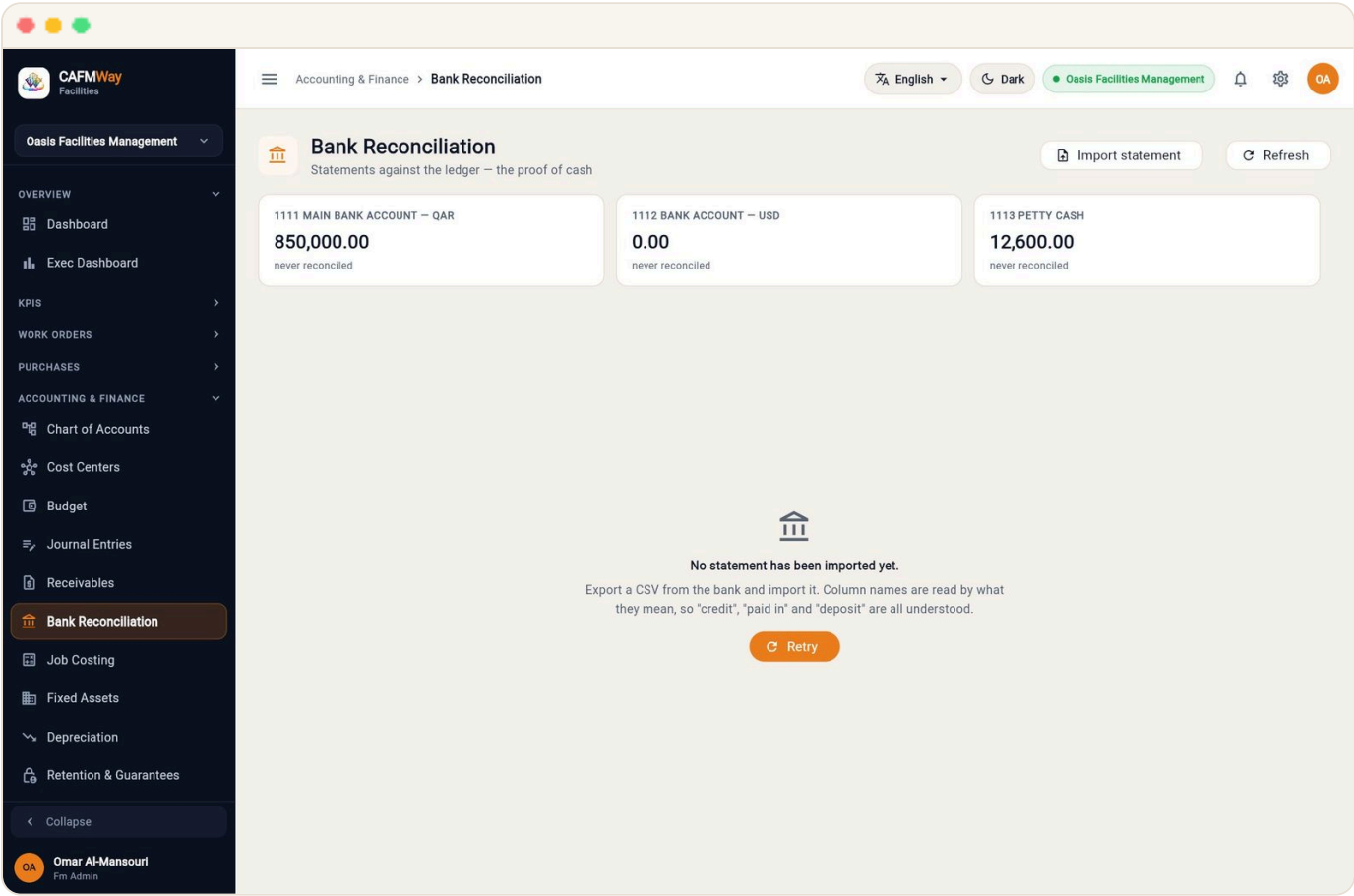


Figure 194 Ledger balances for the QAR bank, USD bank and petty cash accounts

NOTE

Import statement is not available yet. Until it is, use this page to check the ledger balance of each bank and cash account against the bank's statement.

Retention and guarantees

Who: Journal Entry report access

Where: Sidebar → ACCOUNTING & FINANCE → **Retention & Guarantees**

This read-only register shows retention held from you by customers (1140 Retention Receivable), retention you hold from suppliers (2120 Retention Payable) and active bank guarantees with their expiry dates. Retention appears when an invoice is posted with a retention percentage.

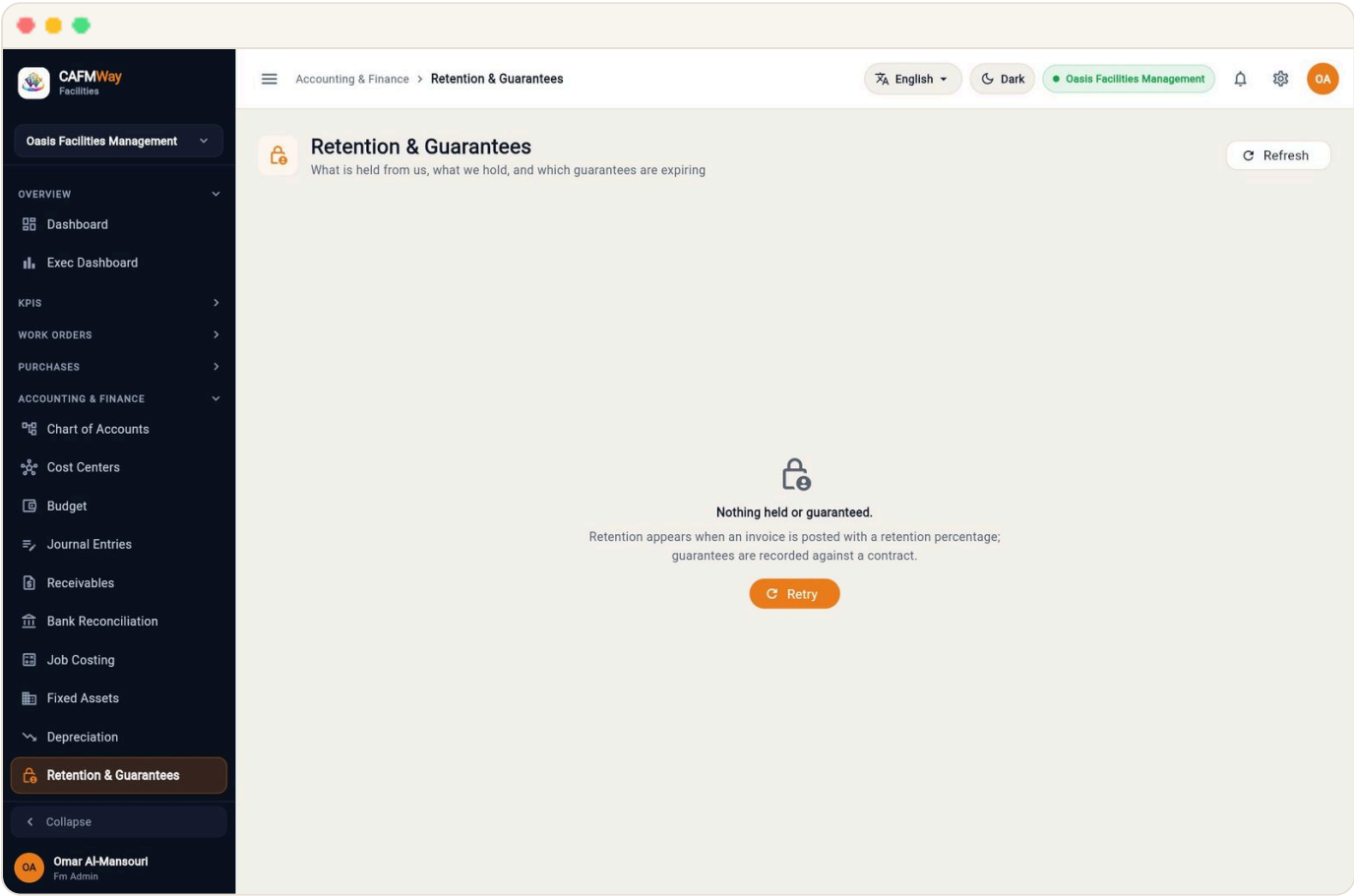


Figure 195 The Retention & Guarantees register with nothing held yet

Tax and withholding tax

Who: Journal Entry report access

Where: Sidebar → ACCOUNTING & FINANCE → Tax & WHT

The Tax page shows, for the month you pick:

- **WHT THIS MONTH:** withholding tax deducted from payments to non-resident service providers.
- **REMIT BY:** the deadline for paying it to the tax authority, the 16th of the following month through the Dhareeba portal, with the days remaining.
- **Deductions this month:** the payments behind the total.
- **Tax rules in force:** the dated rates the system applies: 5% WHT on services to non-residents, 0% VAT (structure only) and 10% corporate tax.

The screenshot shows the CAFMWay web application interface. The left sidebar contains a navigation menu with categories: PURCHASES, ACCOUNTING & FINANCE, and ASSETS & FACILITIES. The 'Tax & WHT' option is highlighted under ACCOUNTING & FINANCE. The main content area is titled 'Tax' and includes a subtitle 'Withholding tax register, monthly return and the dated rate rules'. It features a date selector for '2026-09' and a 'Refresh' button. The page displays three key sections: 'WHT THIS MONTH' showing '0.00', 'REMIT BY' showing '2026-10-16' with '20 day(s) remaining' and a note about the Dhareeba portal, and 'Deductions this month' showing 'No withholding tax deducted in this month'. Below these is a 'Tax rules in force' section with a table of rates.

QA_CORPORATE_TAX	10.00%	10% flat, applied to the profit share attributable to foreign ownership. Wholly Qatari/GCC-owned resident entities are generally exempt.	from 2019-01-01
QA_VAT_STANDARD	0.00%	Qatar signed the GCC VAT Framework Agreement but has never enacted domestic VAT legislation. Structure is in place, zero-rated until enactment.	from 2019-01-01
QA_WHT_SERVICES	5.00%	5% final WHT on service fees, royalties, interest and commissions paid to non-residents. Income Tax Law No. 24 of 2018, Article 9(2). Remit to the GTA by the 16th of the following month via Dhareeba.	from 2019-01-01

Figure 196 The Tax page for September 2026, remit by 16 October

BUSINESS RULE

WHT applies only to service fees paid to non-residents without a Qatar tax card. Payments to resident suppliers never show here.

Period close

Who: Journal Entry submit to close; Company write access as well to reopen (FM Administrator)

Where: Sidebar → ACCOUNTING & FINANCE → **Period Close**

Closing a month stops anything else from being posted into it. Before a month can close, ten checks run against it. Checks marked **BLOCKING** must pass; the others are warnings.

#	Check	Type
1	All completed work orders have costs posted	Blocking
2	No draft invoices dated in the period	Warning
3	Stock and adjustment journals posted (no draft journals)	Blocking
4	Depreciation run for the period	Blocking
5	Prior auto-reversing accruals reversed	Blocking
6	FX revaluation of foreign-currency balances	Warning
7	Bank reconciliation complete	Confirm manually
8	Subledger tie-out (AR, AP, inventory, retention, fixed assets)	Blocking
9	Trial balance sums to zero	Blocking
10	Budget variance reviewed	Information

Close a month

- 1 Open **Period Close** and pick the month in the list on the left. Each month shows its number of postings and whether it is **Open** or **Closed**.
- 2 Read the checklist. A failing check is red and says what is wrong.
- 3 Fix what blocks the close, then click **Re-run checks**.
- 4 When every blocking check passes, click **Close Period**.
- 5 Confirm with **Close period**. The month shows **Closed**.

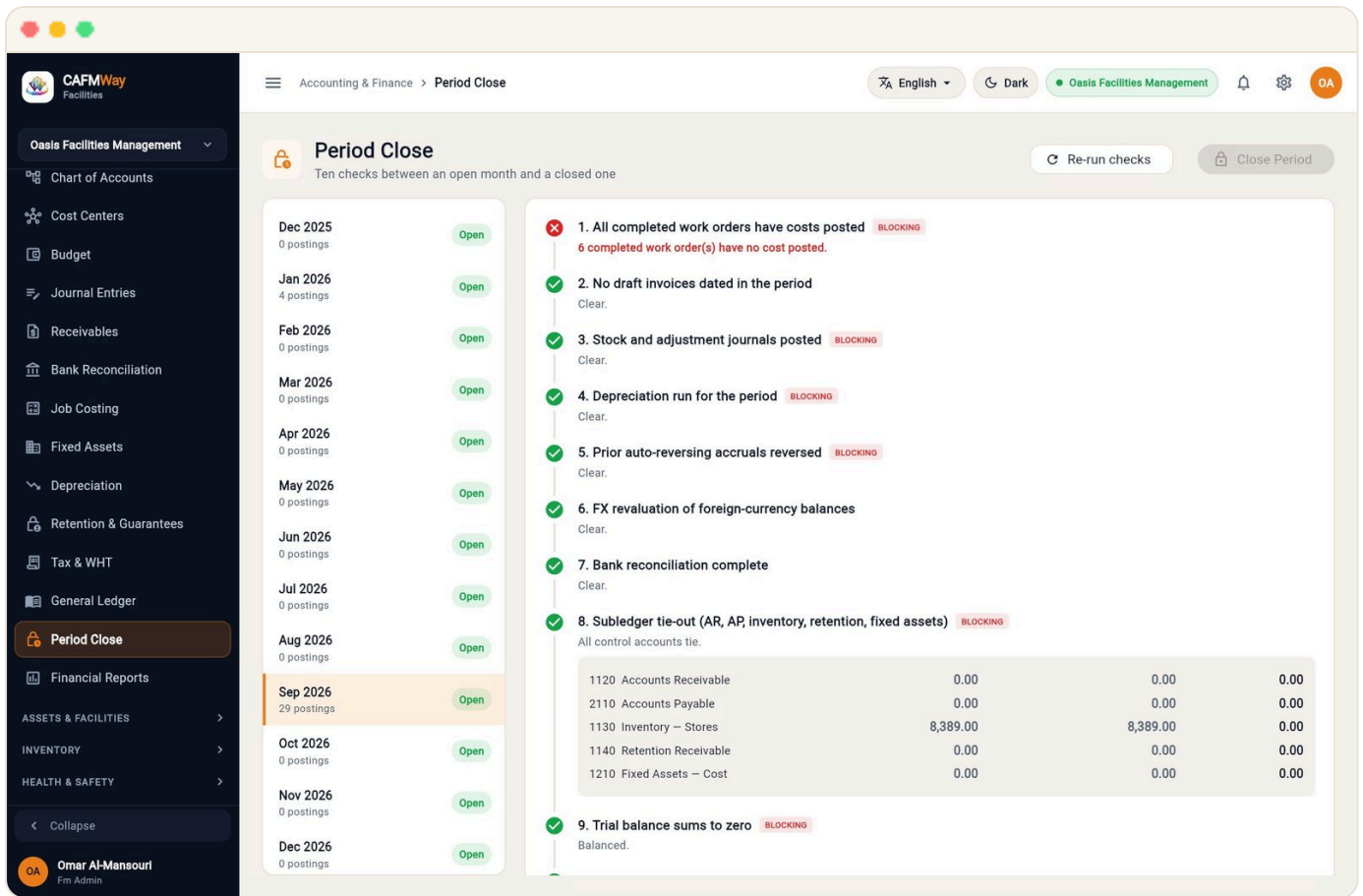


Figure 197 September 2026 blocked by check 1: six completed work orders have no cost posted

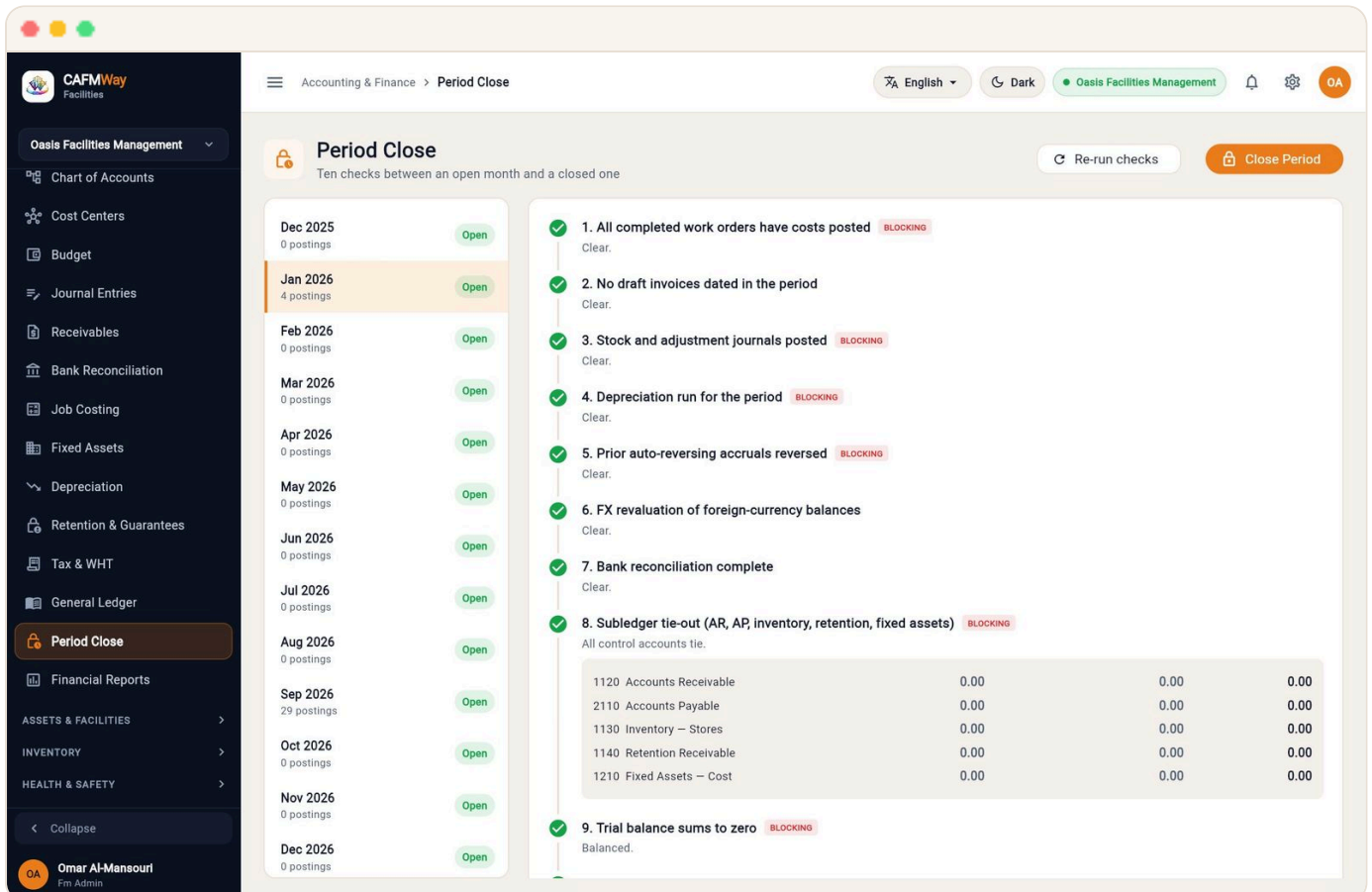


Figure 198 January 2026 with every check passing

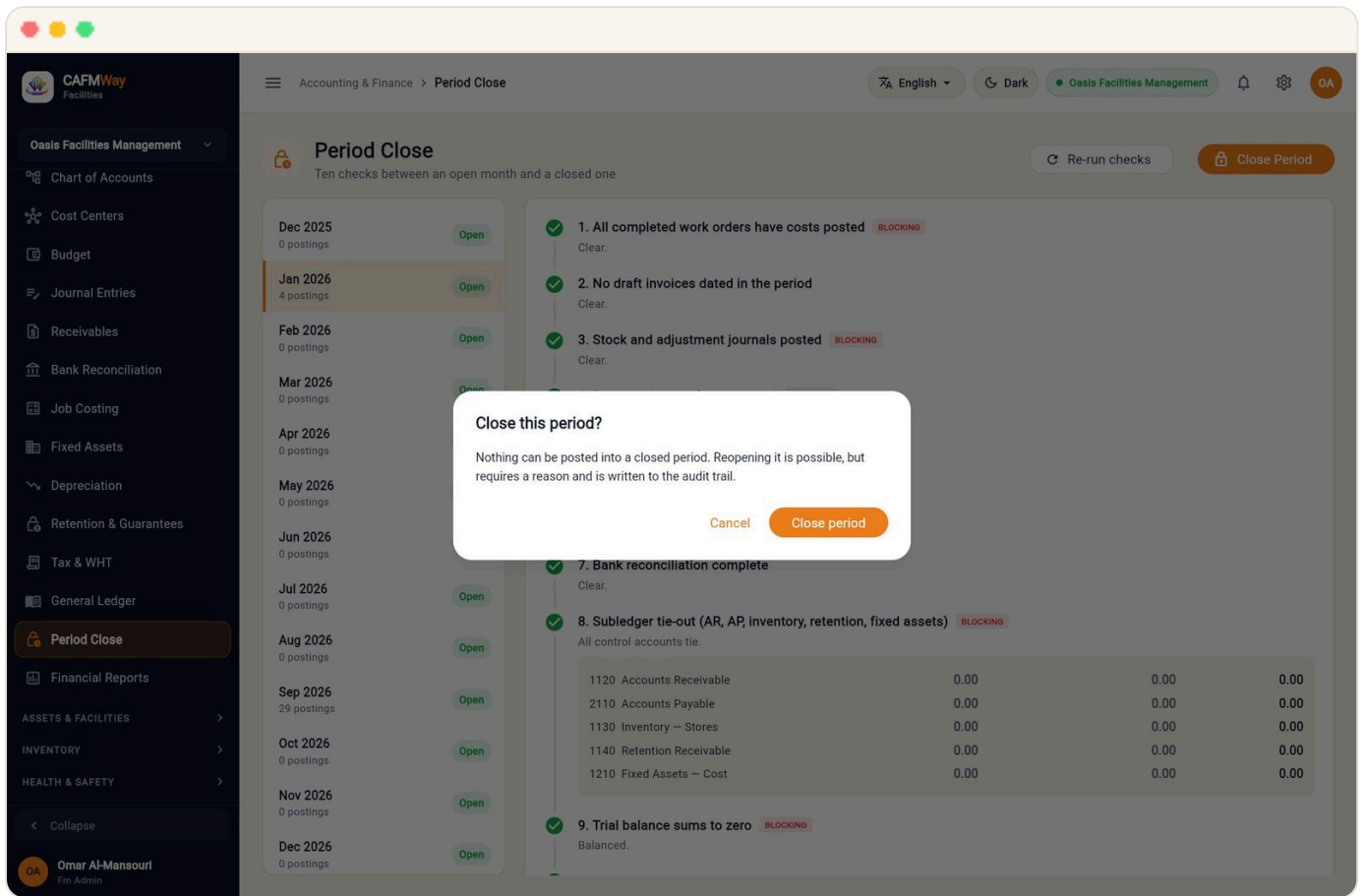


Figure 199 The confirmation before closing a period

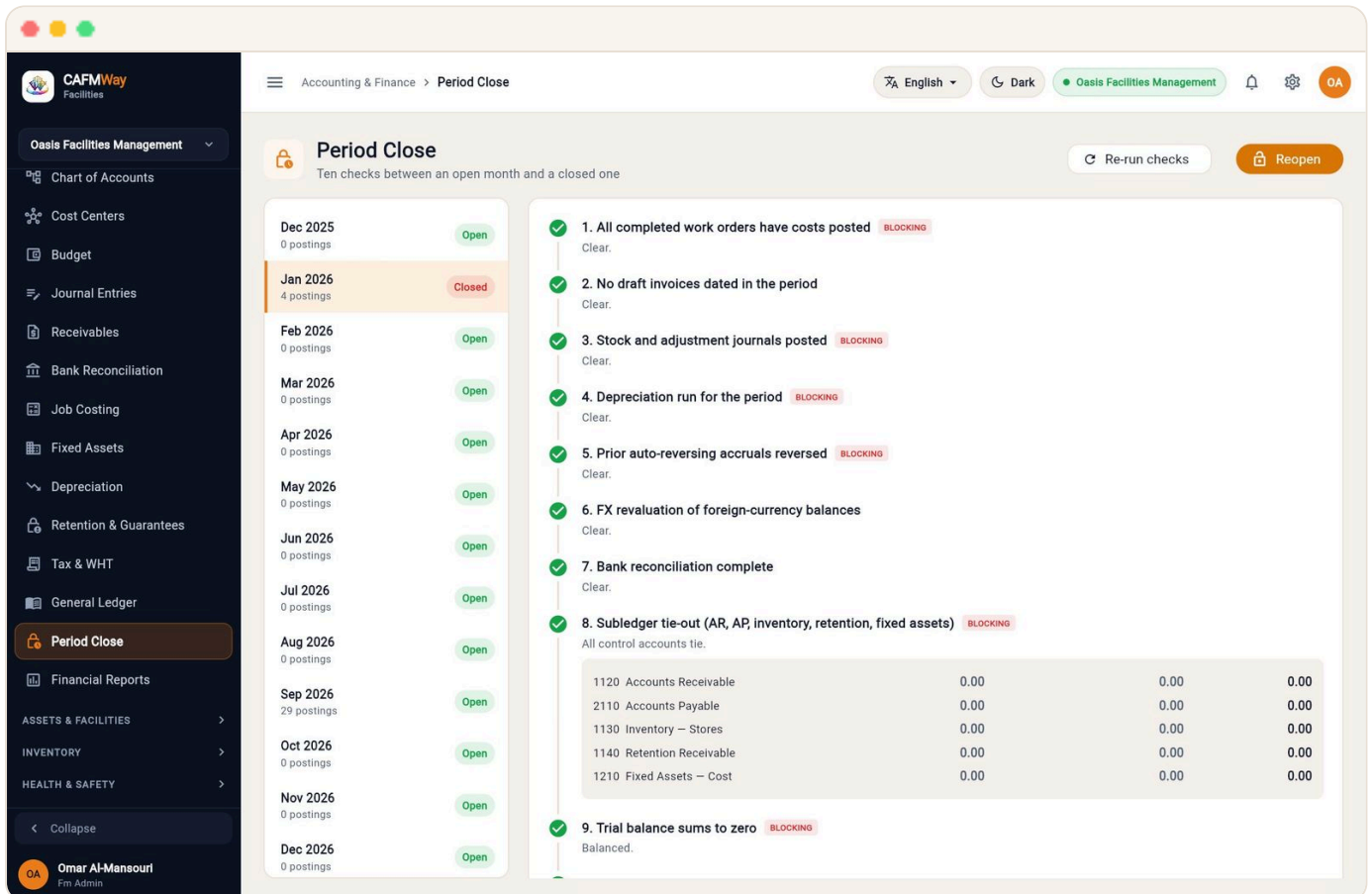


Figure 200 January 2026 closed, with the Reopen button available

TIP

After closing, click the month again to refresh the header. The **Reopen** button appears once the closed month is selected.

Reopen a month

- 1 Select the closed month and click **Reopen**.
- 2 Enter the **Reason**. Reopening is recorded against your name with this reason.
- 3 Click **Reopen**.

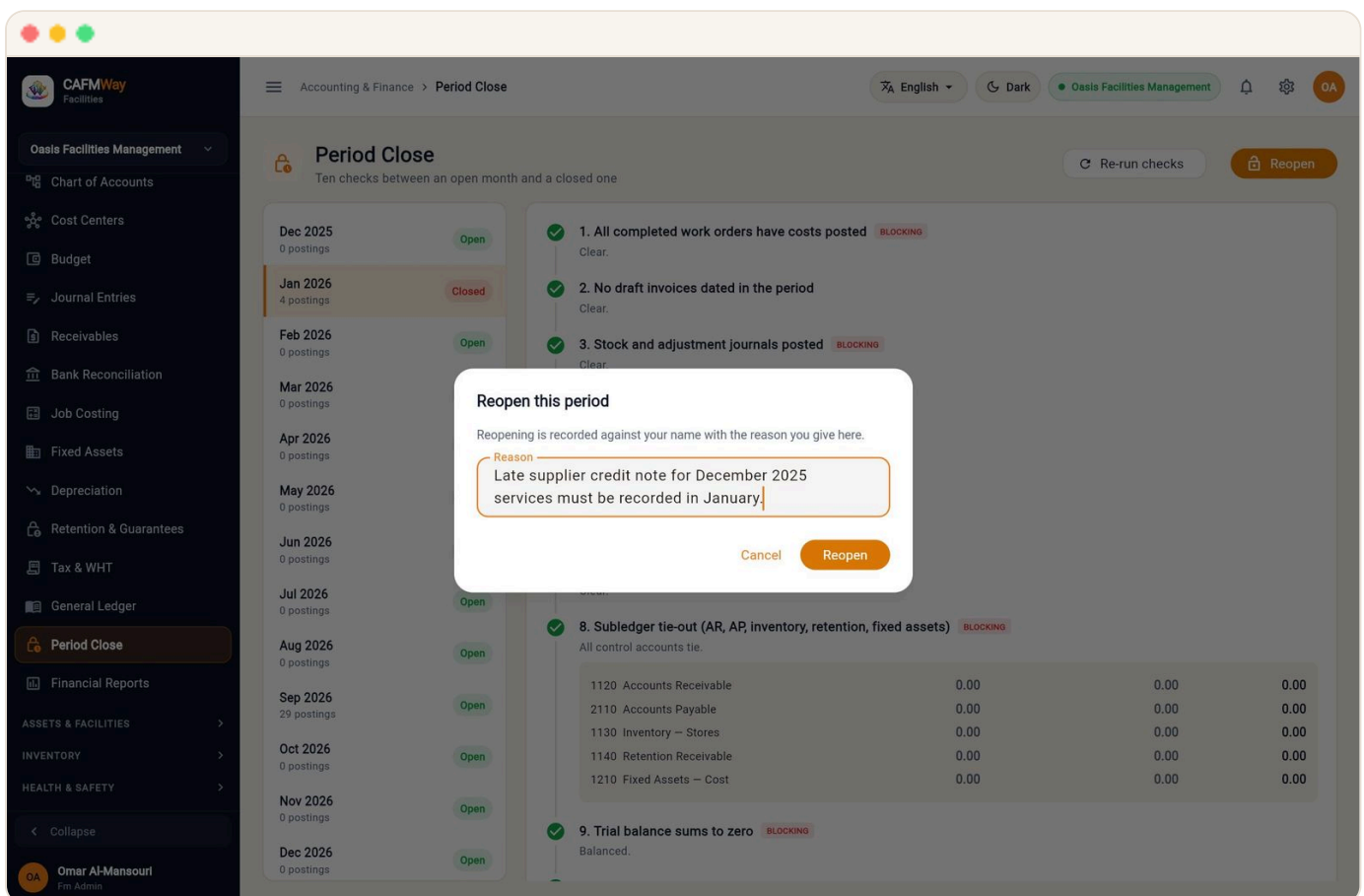


Figure 201 Reopening January 2026 with a reason

BUSINESS RULE

Postings dated in a closed month are refused. The year-end closing entry that moves the year's profit to retained earnings is run by your administrator.

Financial reports

Who: Journal Entry report access; **PPM ROI** and **Multi-year Spend** need Budget access

Where: Sidebar → ACCOUNTING & FINANCE → **Financial Reports**

All reports read the ledger for the date range shown at the top right. Click the range to change it.

Tab	What it shows
Trial Balance	Debit and credit balance of every account with postings, with a check that the totals agree
Profit & Loss	Revenue, costs and expenses, and the net result with its margin
Balance Sheet	Assets, liabilities and equity (including this year's result), with a check that they balance
Cash Flow	Operating, investing and financing movements in cash
Ageing	Outstanding supplier invoices (Payables) and customer invoices (Receivables) by age
Contract Profitability	Revenue, cost and margin per FM contract
Cost per m²	Maintenance cost per building divided by its floor area
PPM vs Reactive	Share of maintenance spend on planned and reactive work
PPM ROI	Preventive against reactive and corrective spend for the year
Multi-year Spend	Budget, actual and variance per year, with the categories that grew fastest

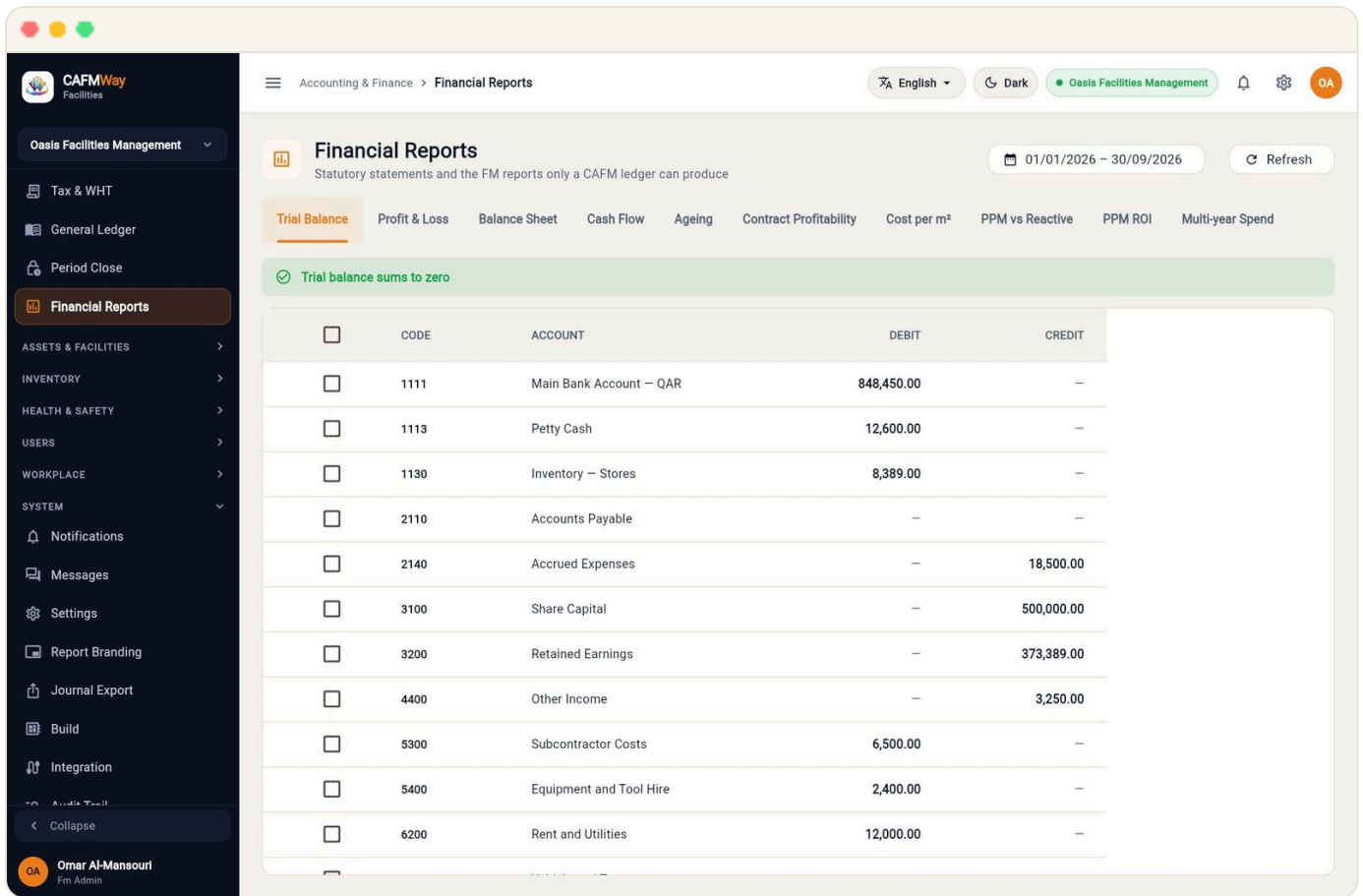


Figure 202 The trial balance to 30 September 2026, which sums to zero

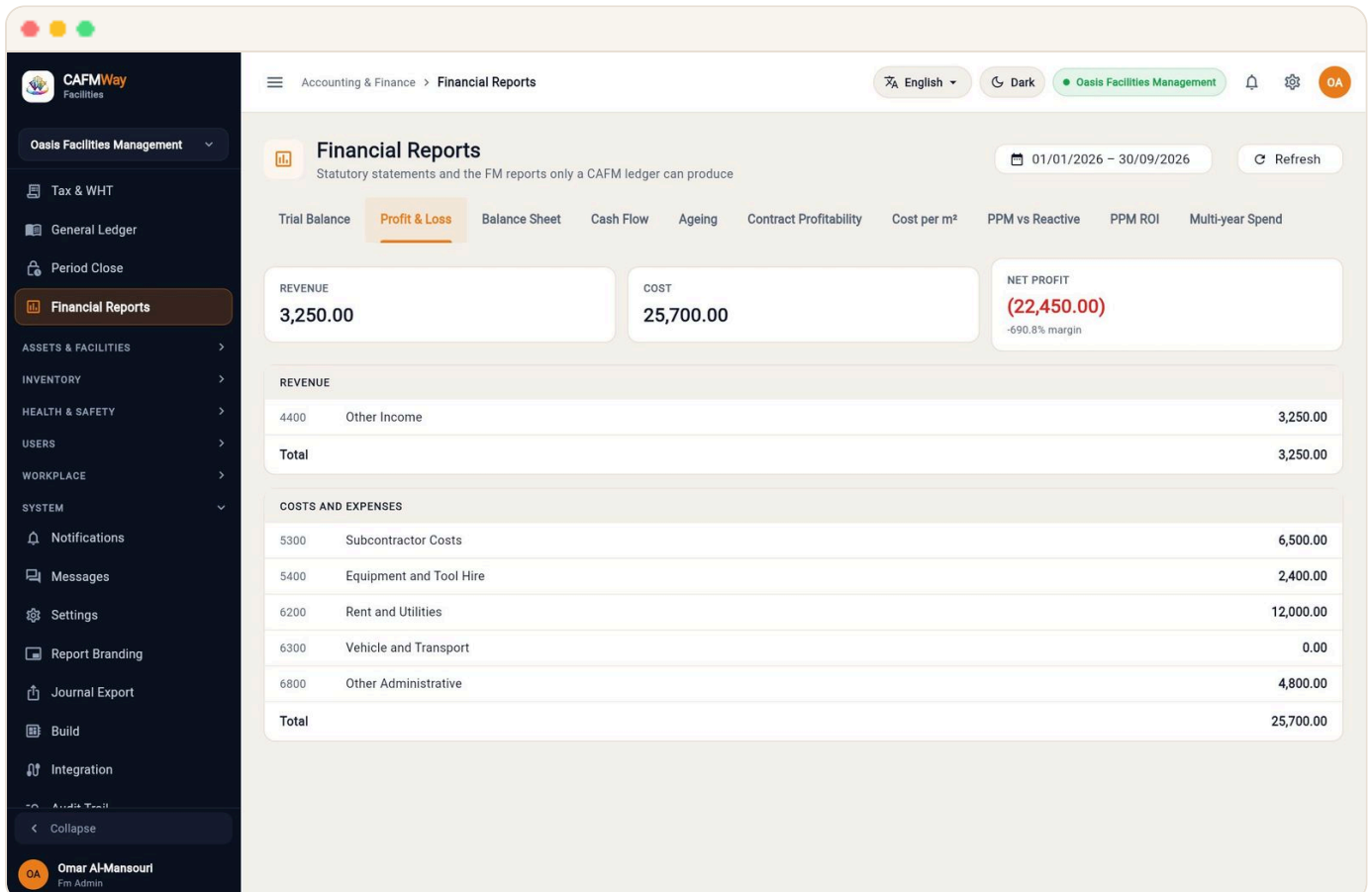


Figure 203 Profit and loss for January to September 2026

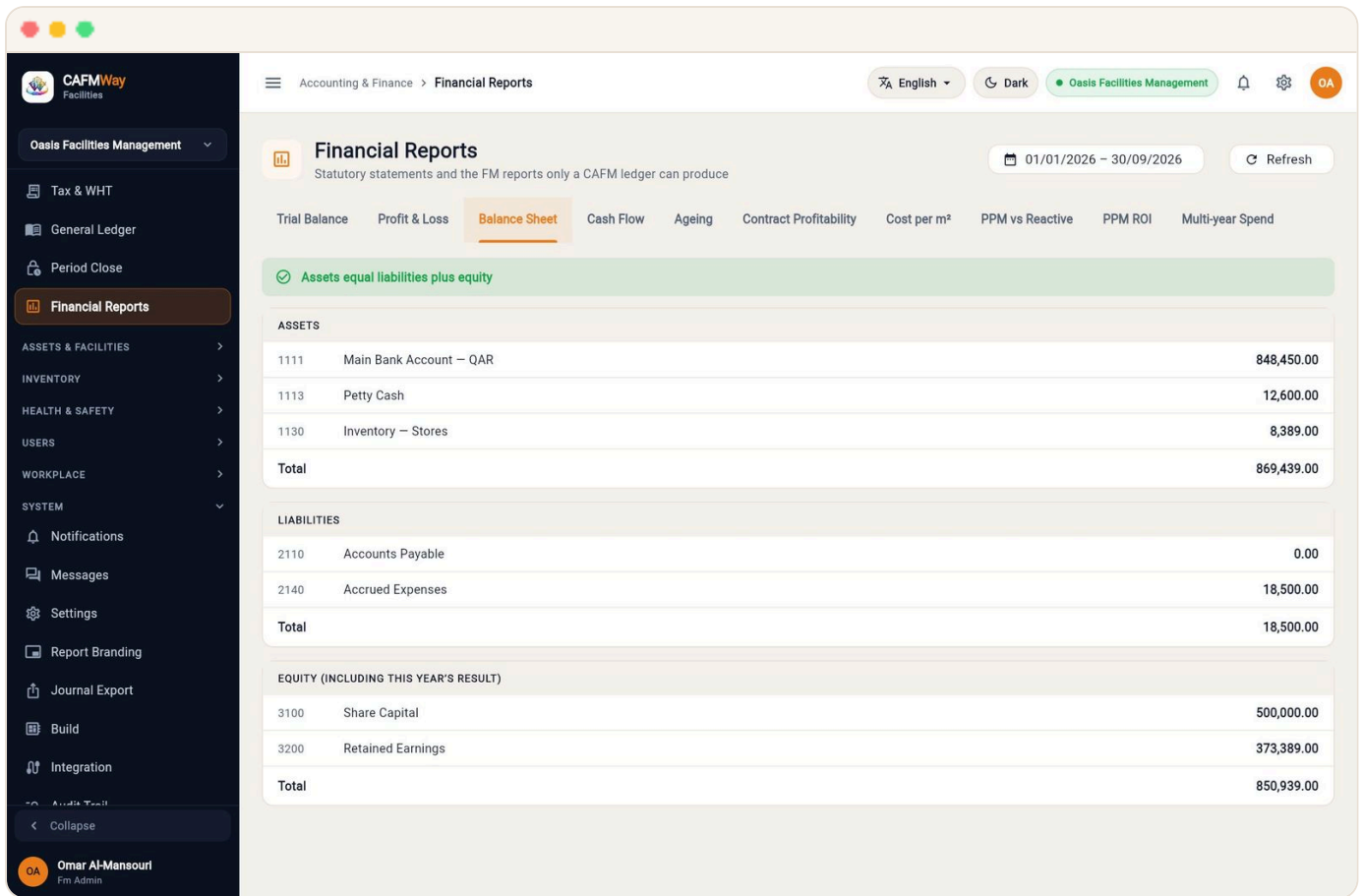


Figure 204 The balance sheet, with assets equal to liabilities plus equity

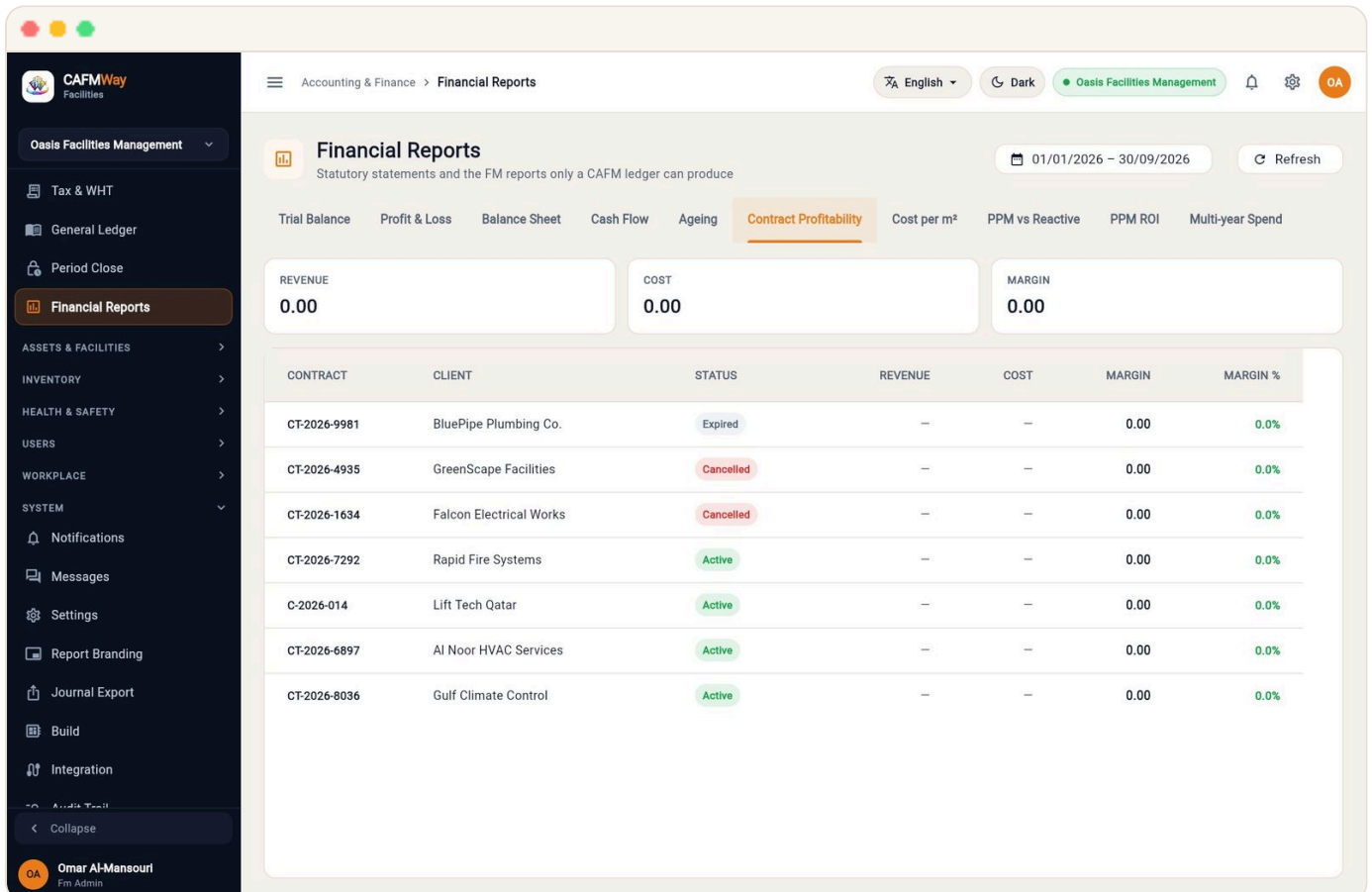


Figure 205 Contract profitability per FM contract

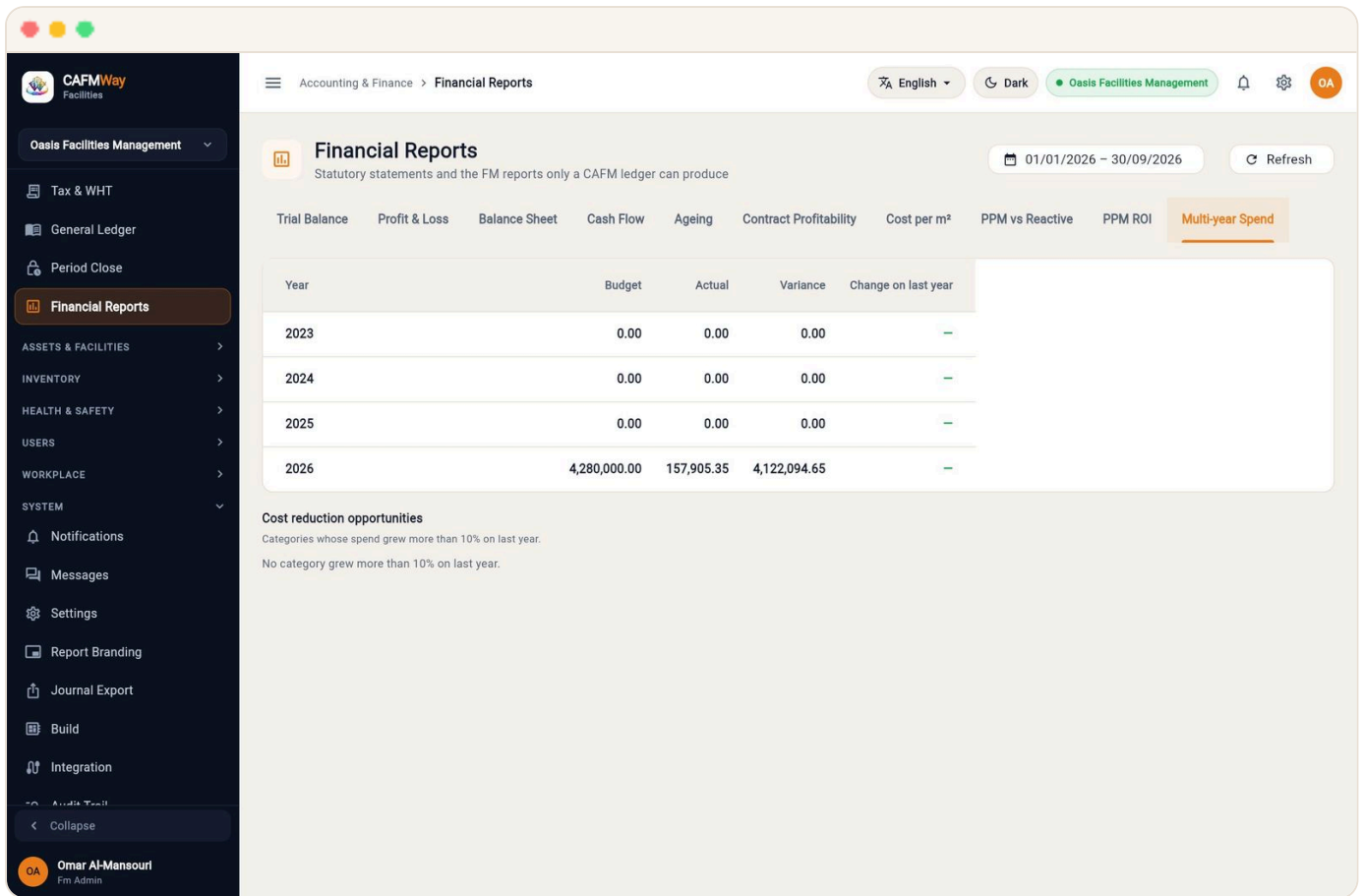


Figure 206 Multi-year spend comparing budget and actual per year

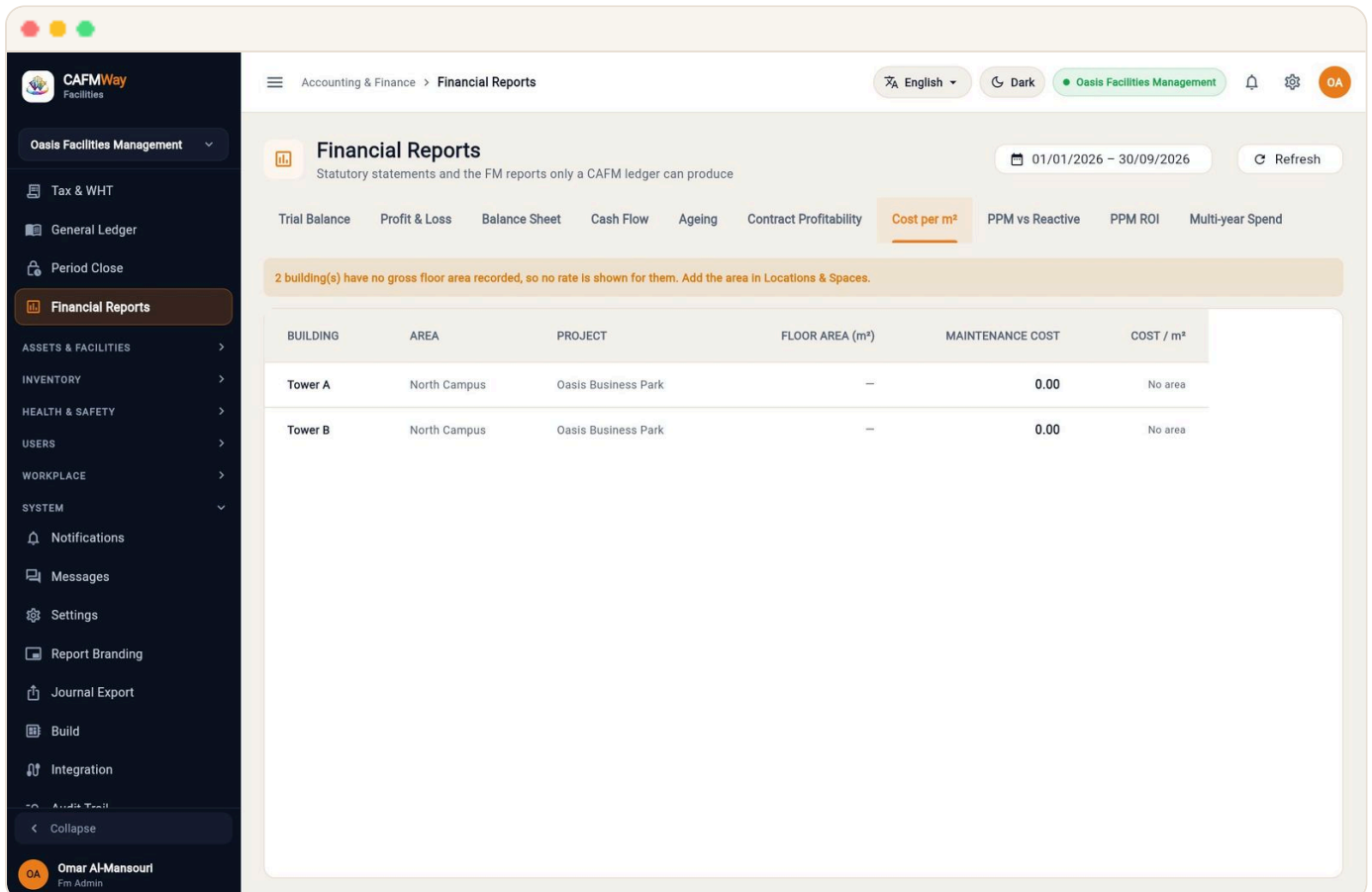


Figure 207 Cost per square metre, with a warning that two buildings have no floor area recorded

NOTE

Contract profitability fills in once revenue and cost carry a contract dimension. Cost per m² needs each building's gross floor area, entered under Locations & Spaces. **PPM vs Reactive** and **PPM ROI** currently compare material cost only.

CAUTION

The **Cash Flow** tab does not yet account for opening balances and opening stock, so it can show an out-of-balance banner. Use the Trial Balance and Balance Sheet as the reference for cash.

Journal export

Who: Finance Officer, FM Administrator

Where: Sidebar → SYSTEM → **Journal Export**

Journal Export collects the ledger postings of a date range into a batch that can be handed to an external ledger (ERPNext, SAP, QuickBooks, Xero or a CSV file). Sending a batch to a connected ERP is covered in the ERP integration part of this guide.

- 1 Click **New Batch**.
- 2 Choose the **Target system**.
- 3 Check the date range. It defaults to the current month.
- 4 Click **Create**. A message confirms how many entries the batch holds, and the batch appears as **Pending** with its entry count and debit and credit totals.

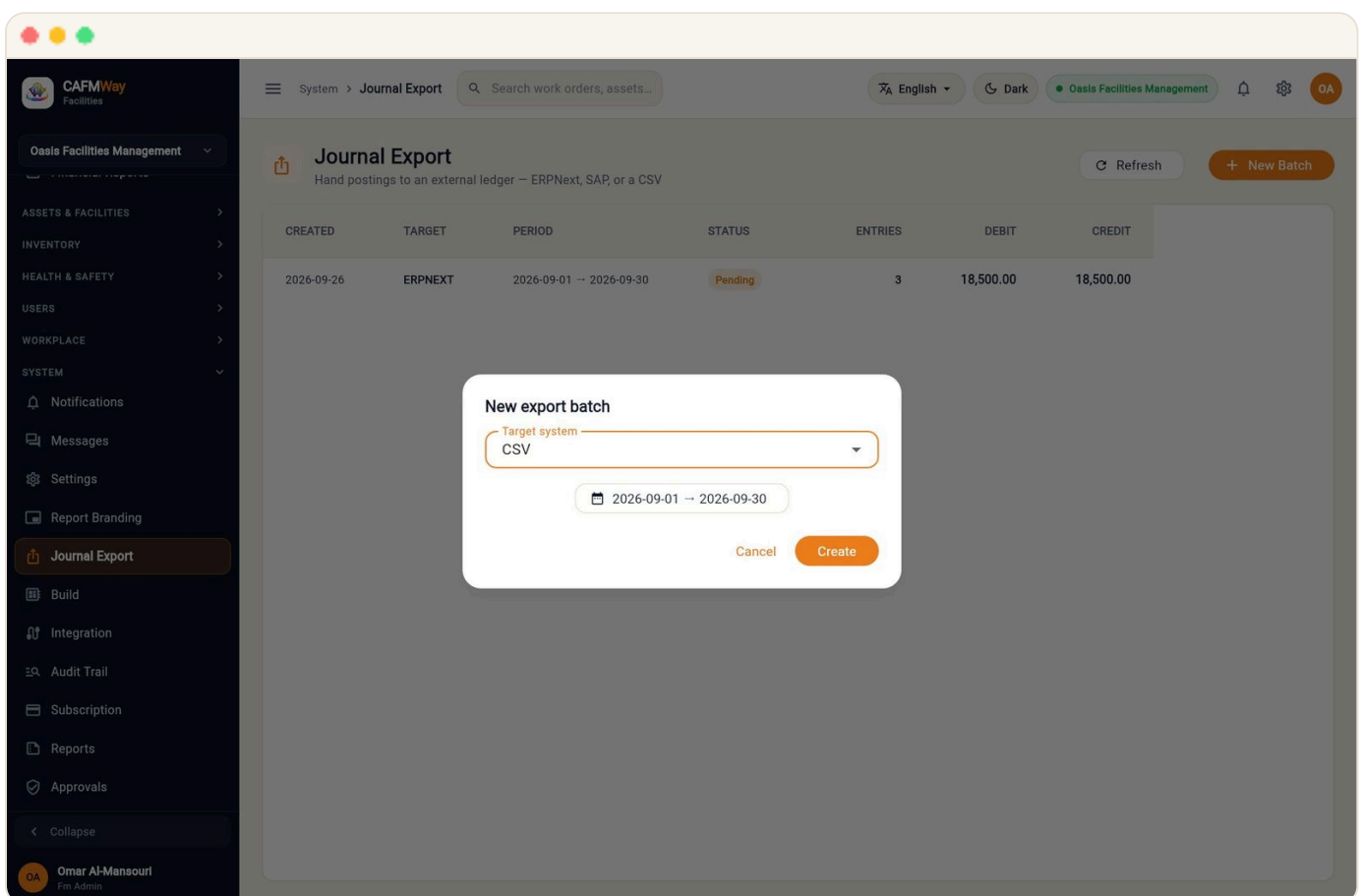


Figure 208 The New export batch dialog with CSV as the target

The screenshot displays the CAFMWay web application interface. On the left is a dark sidebar with a menu including 'Oasis Facilities Management', 'ASSETS & FACILITIES', 'INVENTORY', 'HEALTH & SAFETY', 'USERS', 'WORKPLACE', 'SYSTEM', 'Notifications', 'Messages', 'Settings', 'Report Branding', 'Journal Export' (highlighted), 'Build', 'Integration', 'Audit Trail', 'Subscription', 'Reports', and 'Approvals'. The main content area is titled 'Journal Export' with a subtitle 'Hand postings to an external ledger – ERPNext, SAP, or a CSV'. It features a search bar, 'English' language selector, 'Dark' theme toggle, and 'Oasis Facilities Management' status. Below the title are 'Refresh' and 'New Batch' buttons. A table lists two pending batches:

CREATED	TARGET	PERIOD	STATUS	ENTRIES	DEBIT	CREDIT
2026-09-26	CSV	2026-09-01 → 2026-09-30	Pending	29	43,689.00	43,689.00
2026-09-26	ERPNext	2026-09-01 → 2026-09-30	Pending	3	18,500.00	18,500.00

The bottom of the sidebar shows the user 'Omar Al-Mansouri' with the role 'Fm Admin'.

Figure 209 Two pending export batches for September 2026

CAUTION

A new batch can include postings that an earlier batch already carried. Agree with your ERP team which batch is sent for each period so nothing is posted twice.

ERP integration

This part explains how CAFM Way exchanges data with your organisation's ERP: ERPNext, Odoo, Oracle Fusion ERP Cloud or SAP S/4HANA. It is written for the FM administrator who sets up the connection, and for the finance team who needs to know what reaches the ledger and when.

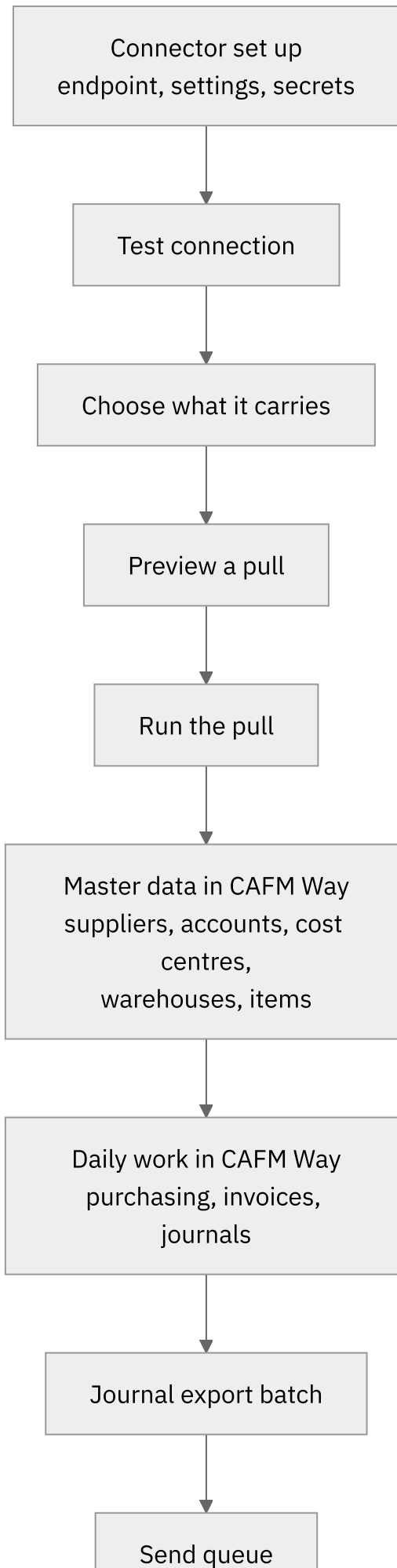
Integration at a glance

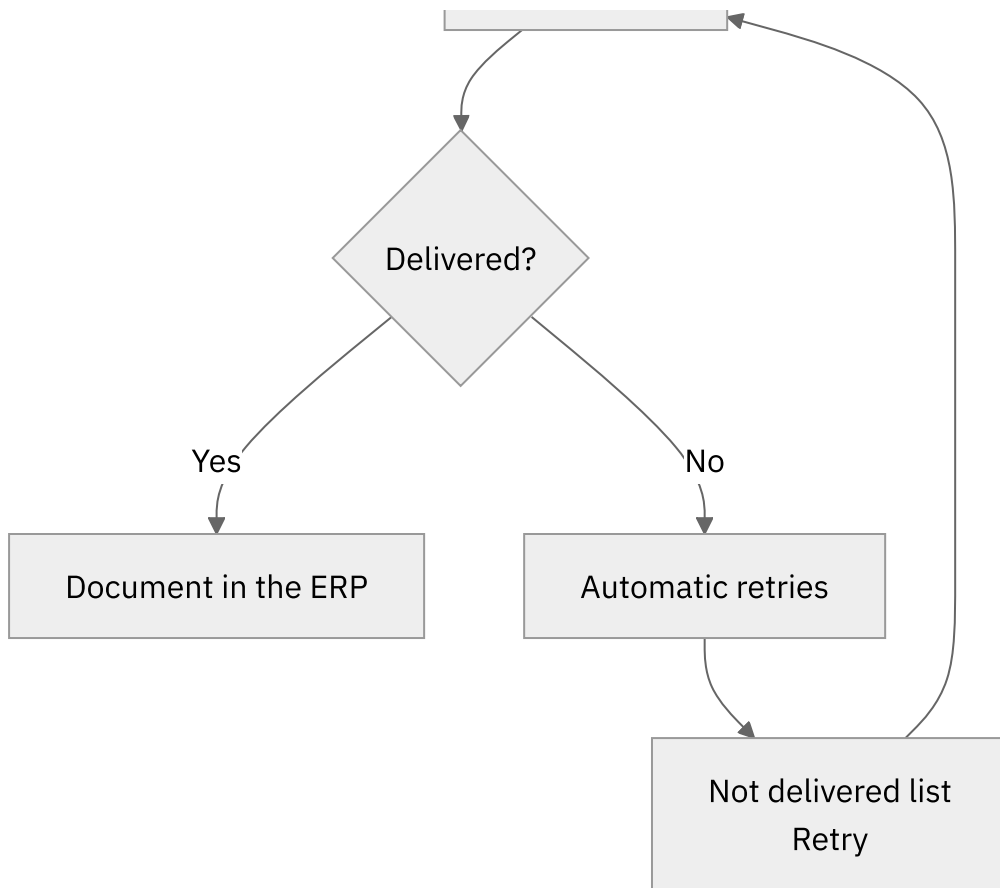
Who: FM Administrator, FM Manager (set up and monitor); Finance Officer (journal export)

Where: Sidebar → SYSTEM → **Integration**; Sidebar → SYSTEM → **Journal Export**

CAFM Way is the subledger for facilities work. It is not a second ERP. The integration follows one rule: **master data flows in, transactions flow out**. The ERP owns suppliers, the chart of accounts, cost centres, warehouses and items, and CAFM Way copies them. CAFM Way owns the facilities transactions and sends the finished accounting documents to the ERP. Each record has one owner, and the other side never overwrites the owner's fields.







What travels in each direction

Data	Direction	ERPNext	Odoo	Oracle Fusion	SAP S/4HANA
Suppliers	ERP → CAFM	Yes	Yes	Yes	Yes
Chart of accounts	ERP → CAFM	Yes	Yes	No	Yes
Cost centres	ERP → CAFM	Yes	Yes (analytic accounts)	No	Yes
Warehouses & stores	ERP → CAFM	Yes	Yes	Yes	Yes (plants)
Item groups	ERP → CAFM	Yes	Yes	No	No
Units of measure	ERP → CAFM	Yes	Yes	No	No
Items	ERP → CAFM	Yes	Yes	Yes	Yes (products)
Journal entries	CAFM → ERP	Yes, submitted	Yes, posted	Off until enabled	Off until enabled
Supplier invoices	CAFM → ERP	Yes, with VAT	Only invoices without VAT	No	Off until enabled, only without VAT

Stock quantities are never synchronised. CAFM Way keeps its own stock balances.

NOTE

The following are not available yet: purchase orders sent to the ERP (the switch exists, but no ERP accepts the document yet), purchase orders, supplier invoices or stock movements coming back from the ERP, budgets in either direction, and CAFM Way supplier or item changes sent back to the ERP. Nothing is sent automatically when a purchase order is approved or an invoice is posted.

NOTE

The **System** list on the Connection tab also offers Microsoft Dynamics 365 Finance & Operations. It is not offered when you add a connector, and it is not covered in this guide.

Add an ERP connector

Who: FM Administrator, FM Manager

Where: Sidebar → SYSTEM → **Integration**

A connector is one link to one ERP. Adding it only registers the ERP. Nothing is synchronised until you add credentials and choose what the connector carries.

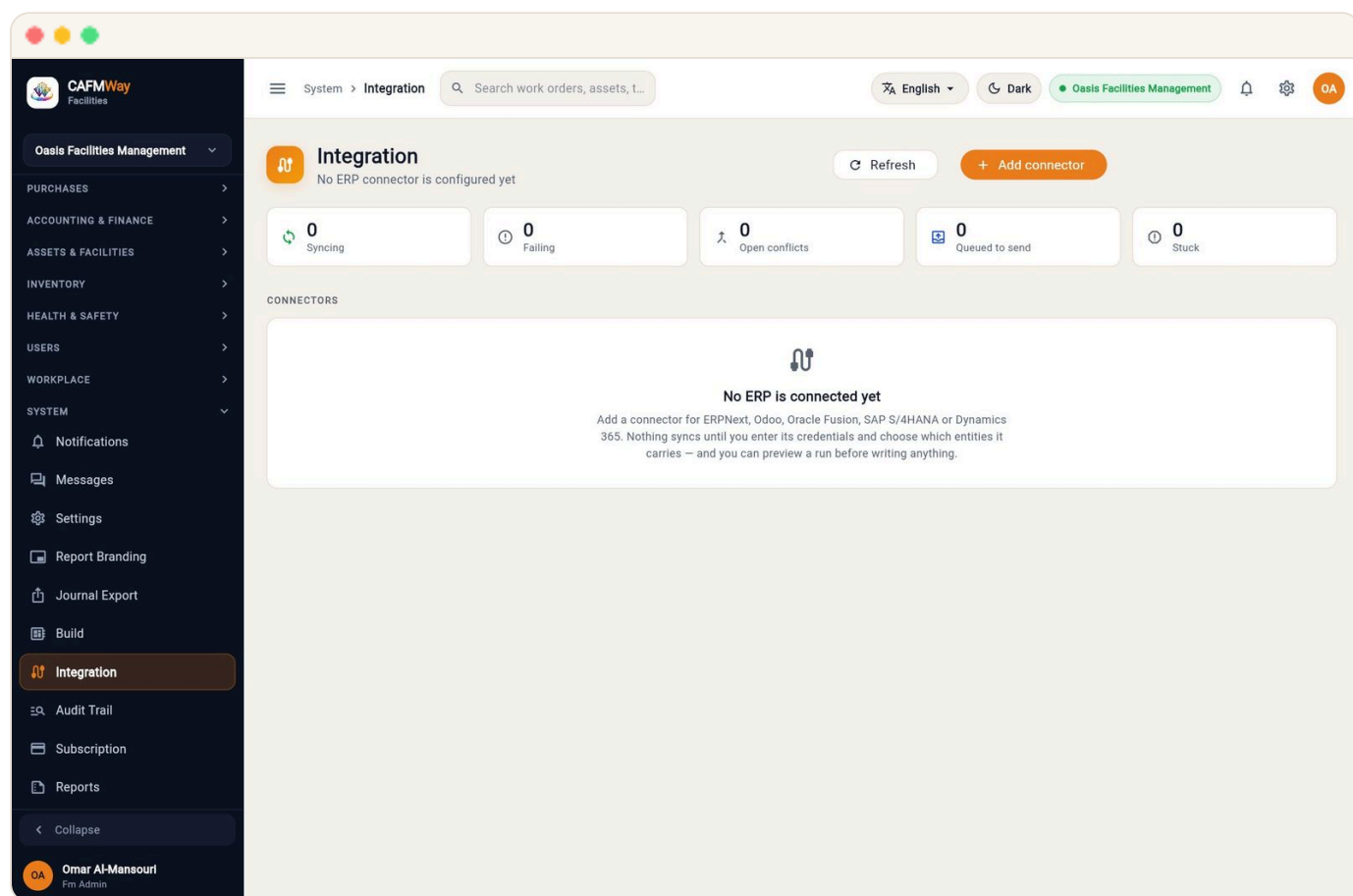


Figure 210 The Integration page before any connector exists, with the five status tiles at zero.

- 1 Open **Integration**. With no connectors, the page shows **No ERP is connected yet**.
- 2 Click **Add connector**. The **Add an ERP connector** dialog opens.
- 3 In **Name**, type a name your team will recognise, for example `Head office ERPNext`.
- 4 In **System**, choose **ERPNext**, **Odoo**, **Oracle Fusion ERP Cloud** or **SAP S/4HANA**.
- 5 In **Endpoint URL**, type the ERP's base address, for example `https://erp.oasis-fm.test`. Leave out any path after the host.
- 6 Click **Add**. The connector appears as a card with the status **Not syncing** and **Never synced**.

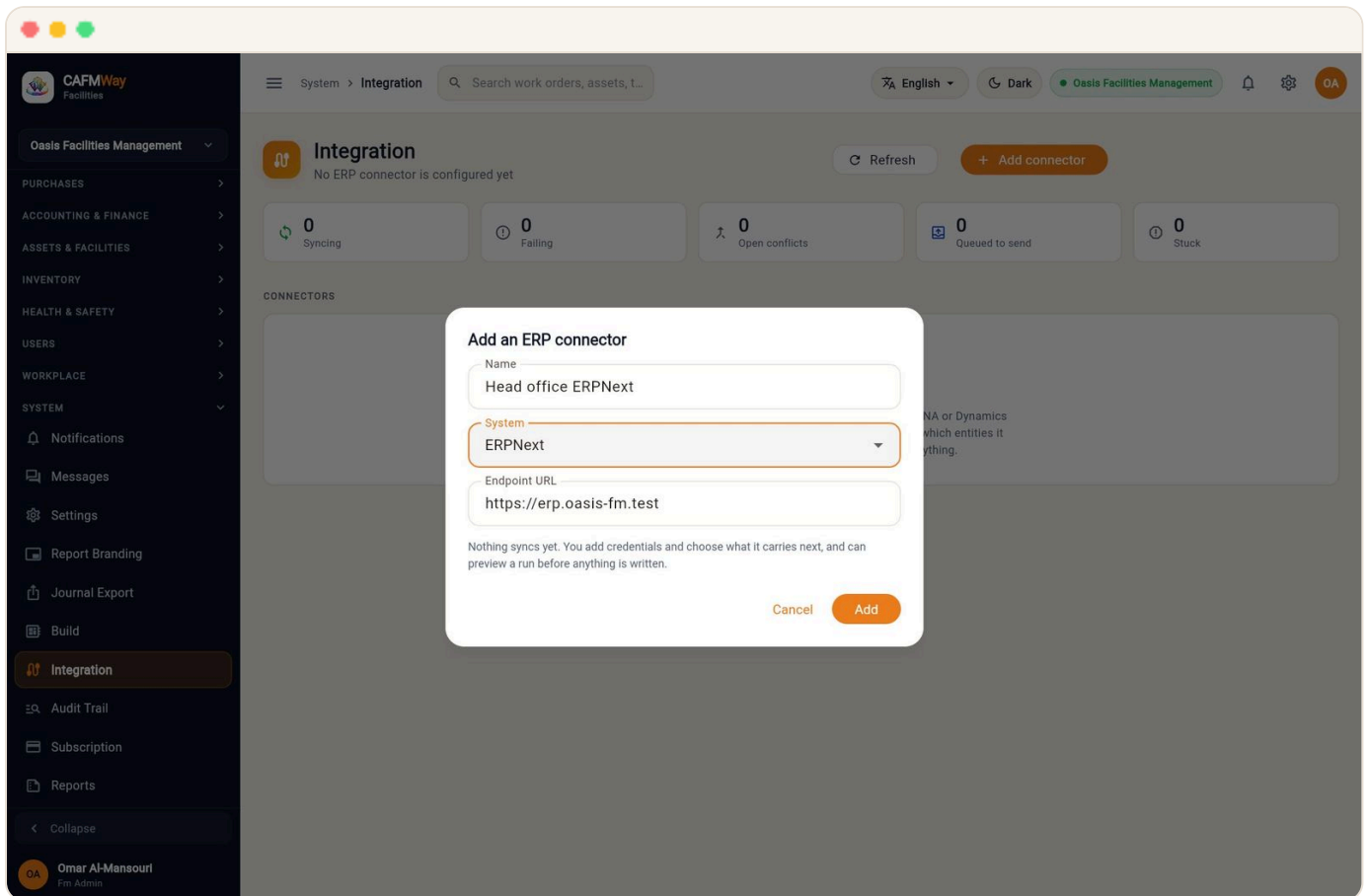


Figure 211 The Add an ERP connector dialog filled in for an ERPNext site.

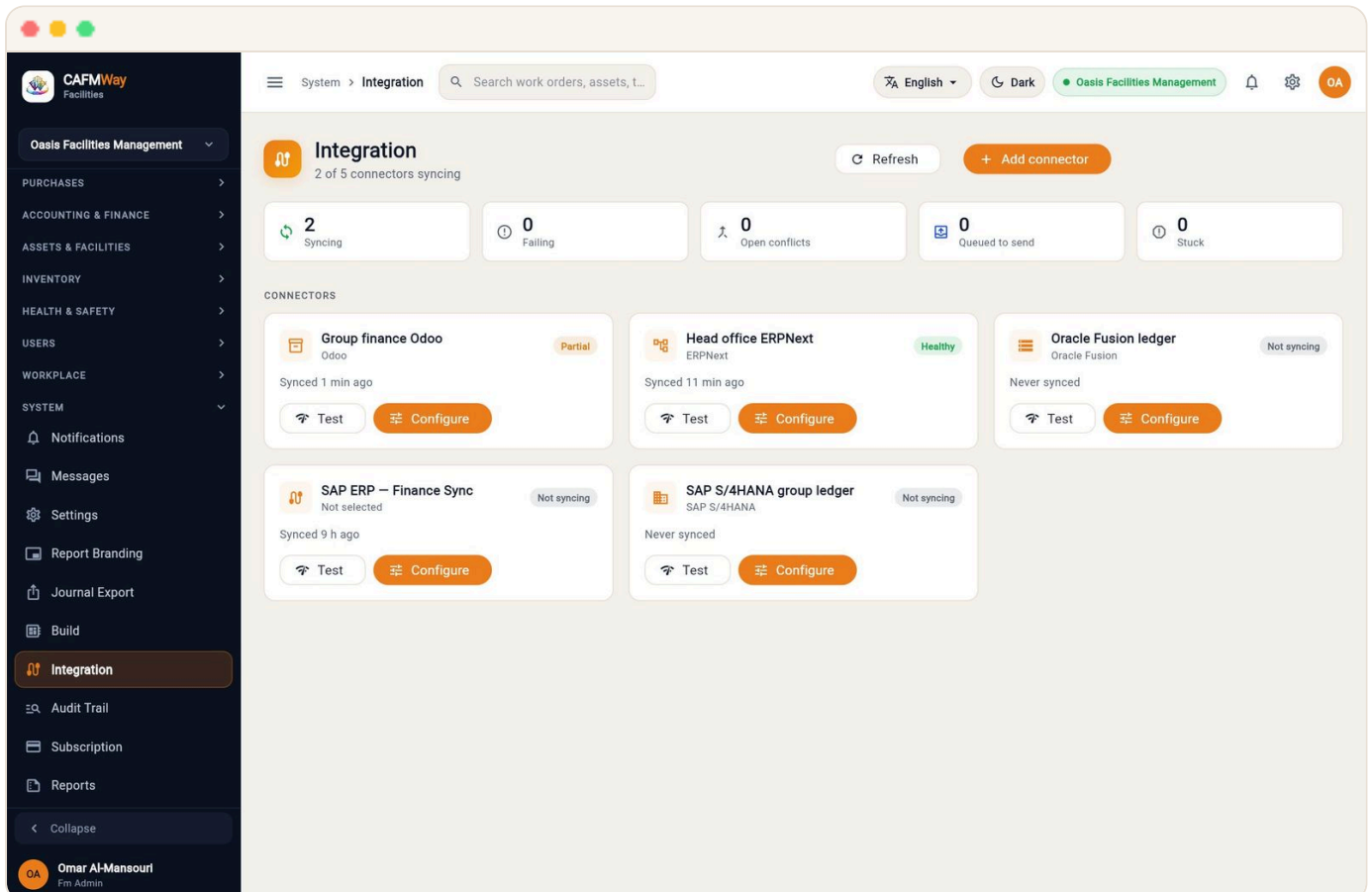


Figure 212 The connector list with one connector for each ERP.

BUSINESS RULE

The endpoint must be a full `http` or `https` address. Addresses on the server itself, link-local addresses and, on the hosted service, private network addresses are refused. An ERP inside your own network needs your CAFM Way installation to allow private addresses.

CAUTION

Connector names are unique within the company. There is no delete button for a connector. To stop a connector, turn off **Scheduled sync** and every entity switch.

Set up the connection

Who: FM Administrator, FM Manager

Where: Integration → connector card → **Configure** → **Connection**

The **Connection** tab holds the address, the ERP type, the schedule and the non-secret settings. Passwords and keys never go here; they go on the **Credentials** tab.

- 1 On the connector card, click **Configure**, then open the **Connection** tab.
- 2 Check **Endpoint URL** and **System**. Changing the system switches the adapter but does not move existing mappings.
- 3 Turn on **Scheduled sync** when you are ready for automatic runs. While it is off, nothing runs on its own and nothing is sent to the ERP, but you can still preview and run pulls by hand.
- 4 In **Poll every**, choose **5 minutes**, **15 minutes**, **30 minutes**, **Hourly**, **Every 4 hours** or **Daily**. Unchanged records cost almost nothing, so a short interval is fine.
- 5 In **Settings**, type the ERP's settings as JSON, one `"name": "value"` pair per setting. The tables below list the settings for each ERP.
- 6 Click **Save**. The message **Connection saved.** confirms it. If the JSON is not valid, the message **Settings must be valid JSON.** appears and nothing is saved.

BUSINESS RULE

Scheduled sync controls both directions. A document or journal is only queued for a connector whose **Scheduled sync** is on and whose entity switch for that document is on.

ERPNext

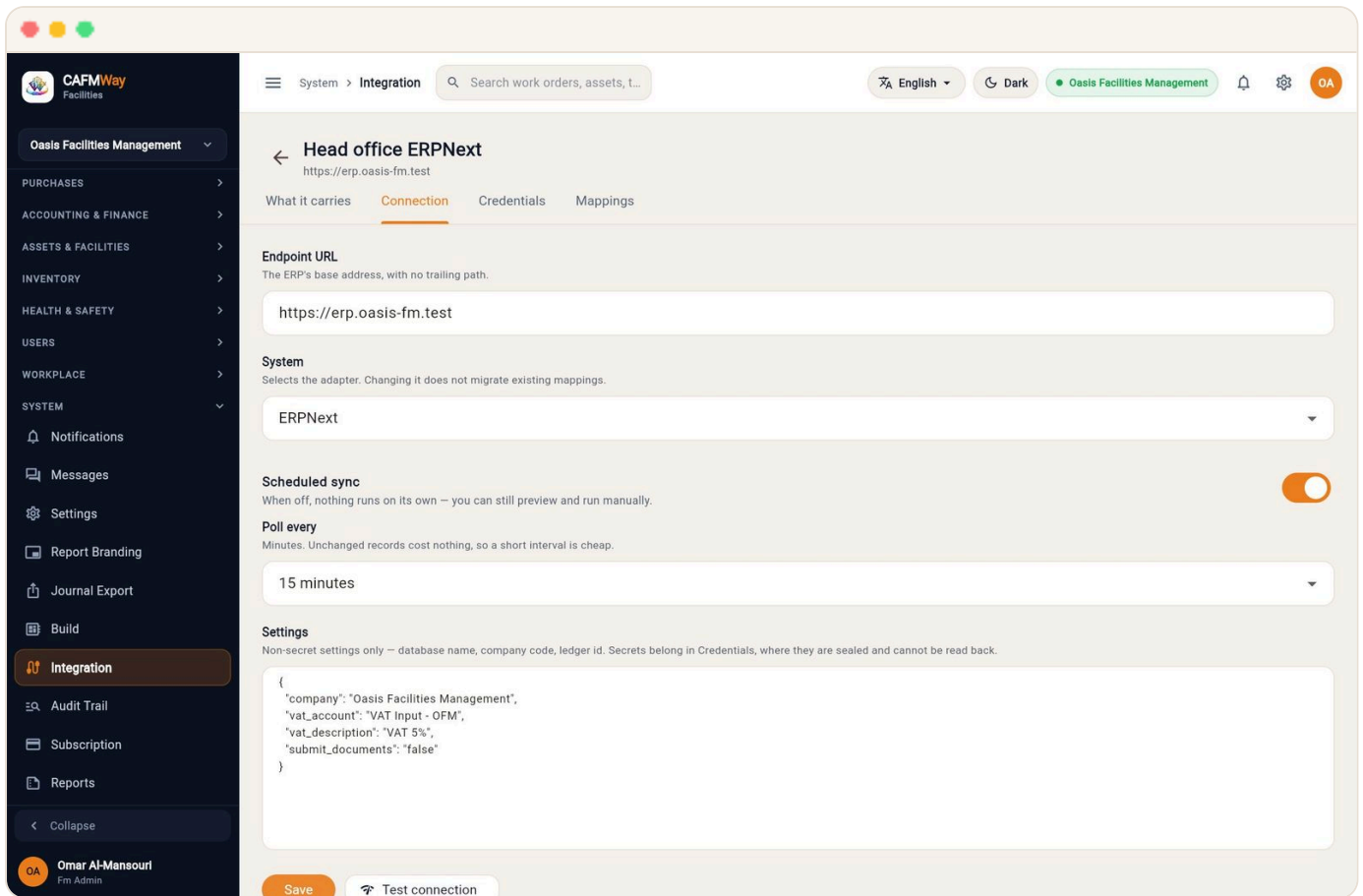


Figure 213 The Connection tab of an ERPNext connector with the company and VAT account settings.

Setting	Required	Meaning
company	For documents	The company name exactly as it appears in ERPNext. Every journal and invoice is posted to it.
vat_account	For invoices with VAT	The ERPNext tax account that receives the VAT line, for example VAT Input - OFM .
vat_description	No	The text on the VAT line. Default VAT .
submit_documents	No	true (default) submits journals and invoices in ERPNext. false leaves them as drafts for review.

Secrets: `api_key` and `api_secret` , generated in ERPNext under the integration user's **Settings** → **API Access**. Optional `webhook_secret` (see the tip under "Pull master data").

Odoo

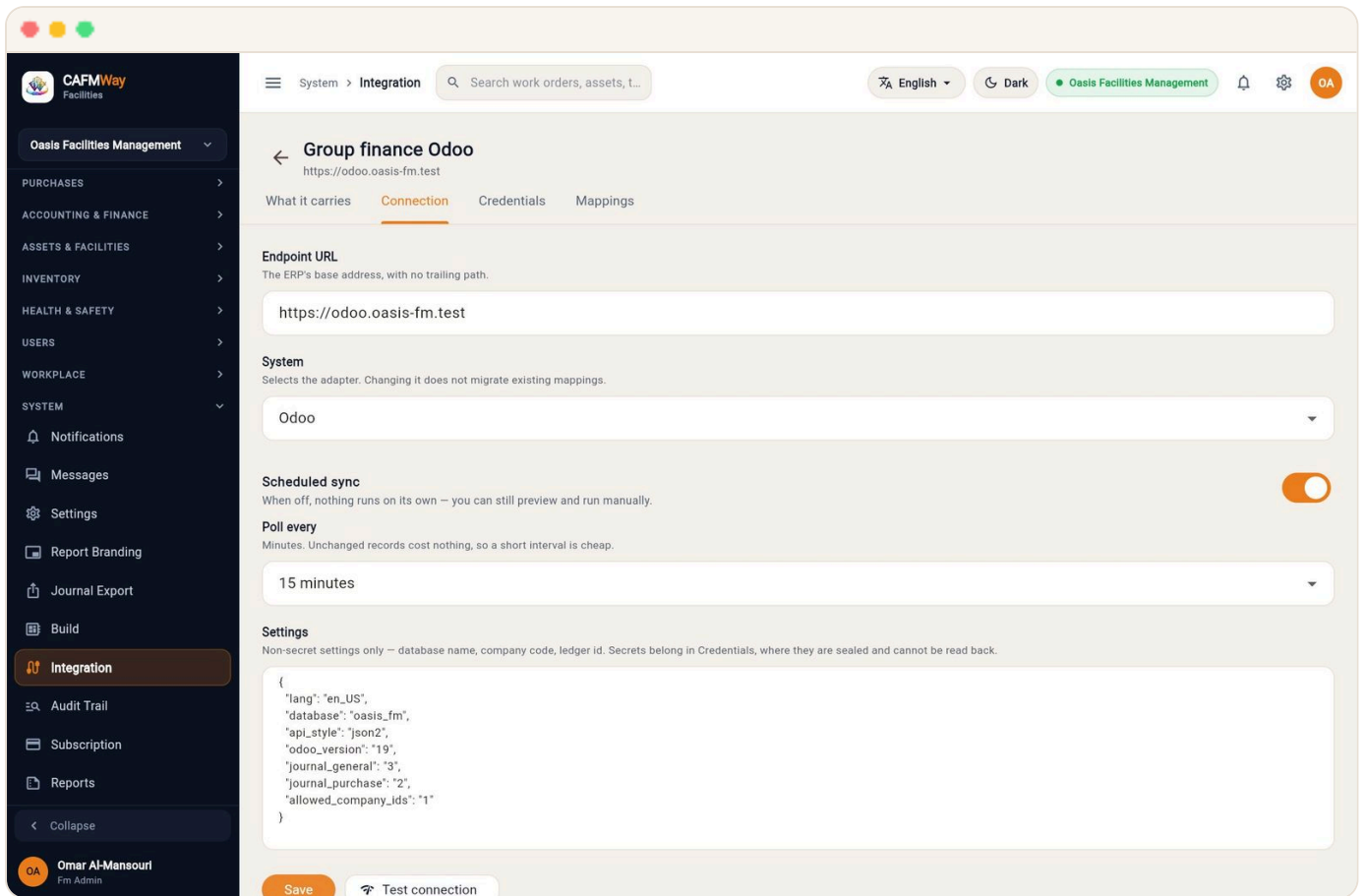


Figure 214 The Connection tab of an Odoo connector with the database, API style and journal settings.

Setting	Required	Meaning
<code>database</code>	Yes	The Odoo database name.
<code>api_style</code>	No	<code>json2</code> (default, Odoo 19 JSON-2 API) or <code>rpc</code> (older JSON-RPC).
<code>username</code>	With <code>rpc</code>	The Odoo login used with the RPC style.
<code>odoo_version</code>	No	Default <code>19</code> . Set <code>17</code> or lower for an older Odoo so that stockable items are written the old way.
<code>allowed_company_ids</code>	Multi-company	Comma-separated Odoo company ids, first one is the main company, for example <code>1</code> or <code>1,3</code> . Without it Odoo answers for the API user's default company.
<code>lang</code>	No	Language for names returned by Odoo. Default <code>en_US</code> .
<code>journal_general</code>	No	The id of the Odoo journal that receives journal entries. Default: the first general journal.
<code>journal_purchase</code>	No	The id of the Odoo journal that receives vendor bills. Default: the first purchase journal.
<code>submit_documents</code>	No	<code>true</code> (default) posts the entries. <code>false</code> leaves drafts.

Secrets: `api_key` (an Odoo API key of the integration user). Optional `webhook_secret`.

Oracle Fusion ERP Cloud

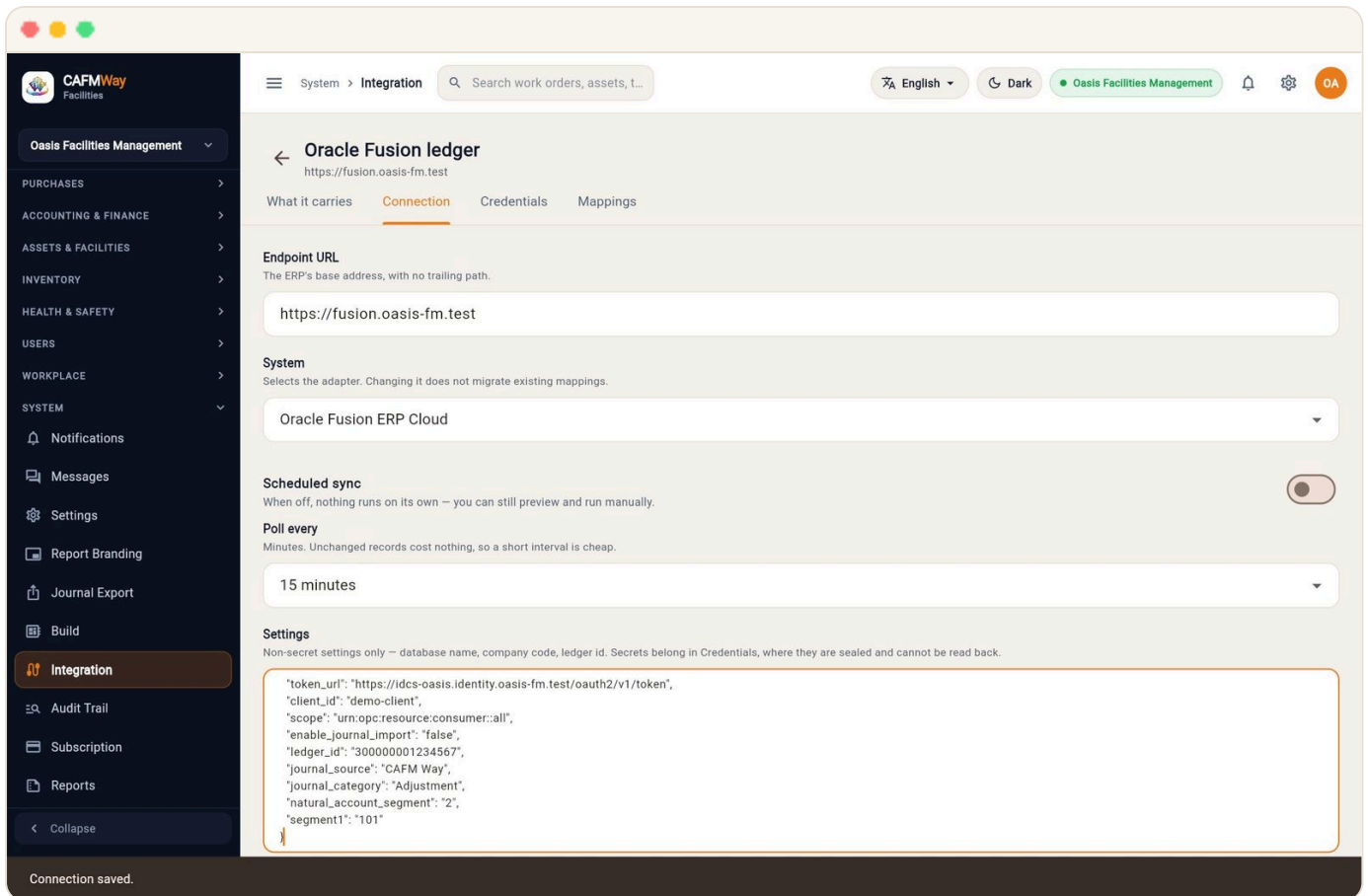


Figure 215 The Connection tab of an Oracle Fusion connector with OAuth and journal import settings.

Setting	Required	Meaning
<code>token_url</code> , <code>client_id</code>	For OAuth	The identity domain's token address and the confidential application's client id, for example <code>demo-client</code> . Store the client secret as the <code>client_secret</code> secret.
<code>scope</code>	No	OAuth scope. Default <code>urn:opc:resource:consumer::all</code> .
<code>username</code>	Instead of OAuth	Basic sign-in with the <code>password</code> secret. Use this only on test pods.
<code>enable_journal_import</code>	No	Default <code>false</code> . Journals are refused until this is <code>true</code> .
<code>ledger_id</code>	For journals	The target ledger's id in Fusion.
<code>fbdi_columns</code>	For journals	The column order of your pod's GL interface template.
<code>natural_account_segment</code>	No	Which chart-of-accounts segment carries the natural account. Default <code>2</code> .
<code>segment1</code> ... <code>segment30</code>	For journals	Fixed values for the other segments, for example the company segment <code>101</code> .
<code>journal_source</code> , <code>journal_category</code>	No	Default <code>Manual</code> and <code>Adjustment</code> .
<code>trust_account_codes</code>	No	Default <code>false</code> . When <code>true</code> , a CAFM Way account code that is not linked to a Fusion account is sent as the natural account as is.

Secrets: `client_secret` (OAuth) or `password` (basic).

CAUTION

Enable `enable_journal_import` only after your Oracle team has loaded a test batch with your pod's own template and checked it in Fusion. A wrong column order posts amounts to the wrong accounts without an error.

SAP S/4HANA

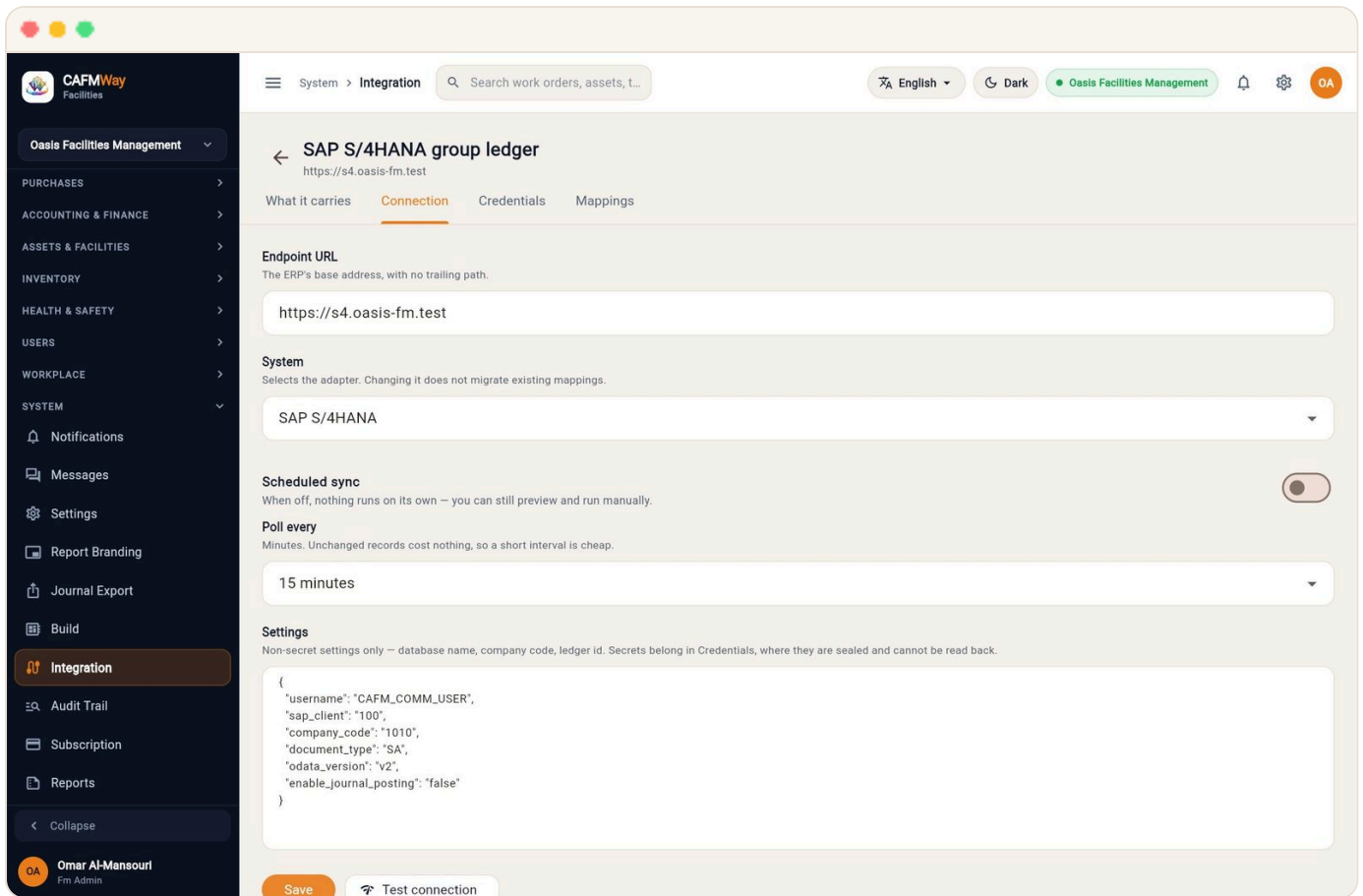


Figure 216 The Connection tab of an SAP S/4HANA connector with the communication user, client and company code.

Setting	Required	Meaning
<code>username</code>	For basic sign-in	The communication user. Store its password as the <code>password</code> secret. Without a username, the <code>access_token</code> secret is sent as a bearer token.
<code>sap_client</code>	Usually	The SAP client number, for example <code>100</code> .
<code>company_code</code>	For documents	The company code that journals and invoices post to, for example <code>1010</code> .
<code>odata_version</code>	No	<code>v2</code> (default) or <code>v4</code> .
<code>enable_journal_posting</code>	No	Default <code>false</code> . Journals and supplier invoices are refused until this is <code>true</code> .
<code>document_type</code>	No	The journal document type. Default <code>SA</code> .
<code>service_<entity></code> , <code>entityset_<entity></code> , <code>key_<entity></code>	No	Override the OData service, entity set or key for one entity when your release names it differently.

Secrets: `password` (with `username`) or `access_token`. The communication arrangement for each scenario, for example journal posting, must exist in SAP.

Store the credentials

Who: FM Administrator, FM Manager

Where: Integration → **Configure** → **Credentials**

Secrets are sealed on the server. After you save one, nobody can read it back, not even an administrator. The page only shows its name and the last four characters.

- 1 Open the **Credentials** tab. Under **Still needed**, a button is shown for each secret this ERP expects that is not stored yet.
- 2 Click the secret's button, for example **api_key**. A dialog opens.
- 3 Paste the value in **Value** and click **Replace**. The secret moves to the list with a masked hint such as `....91c2`.
- 4 Repeat for every secret the ERP needs. For a secret that has no button, click **Add another secret** and type its name and value.
- 5 To change a secret later, click its pencil icon (**Replace**). To delete it, click its bin icon (**Remove**).

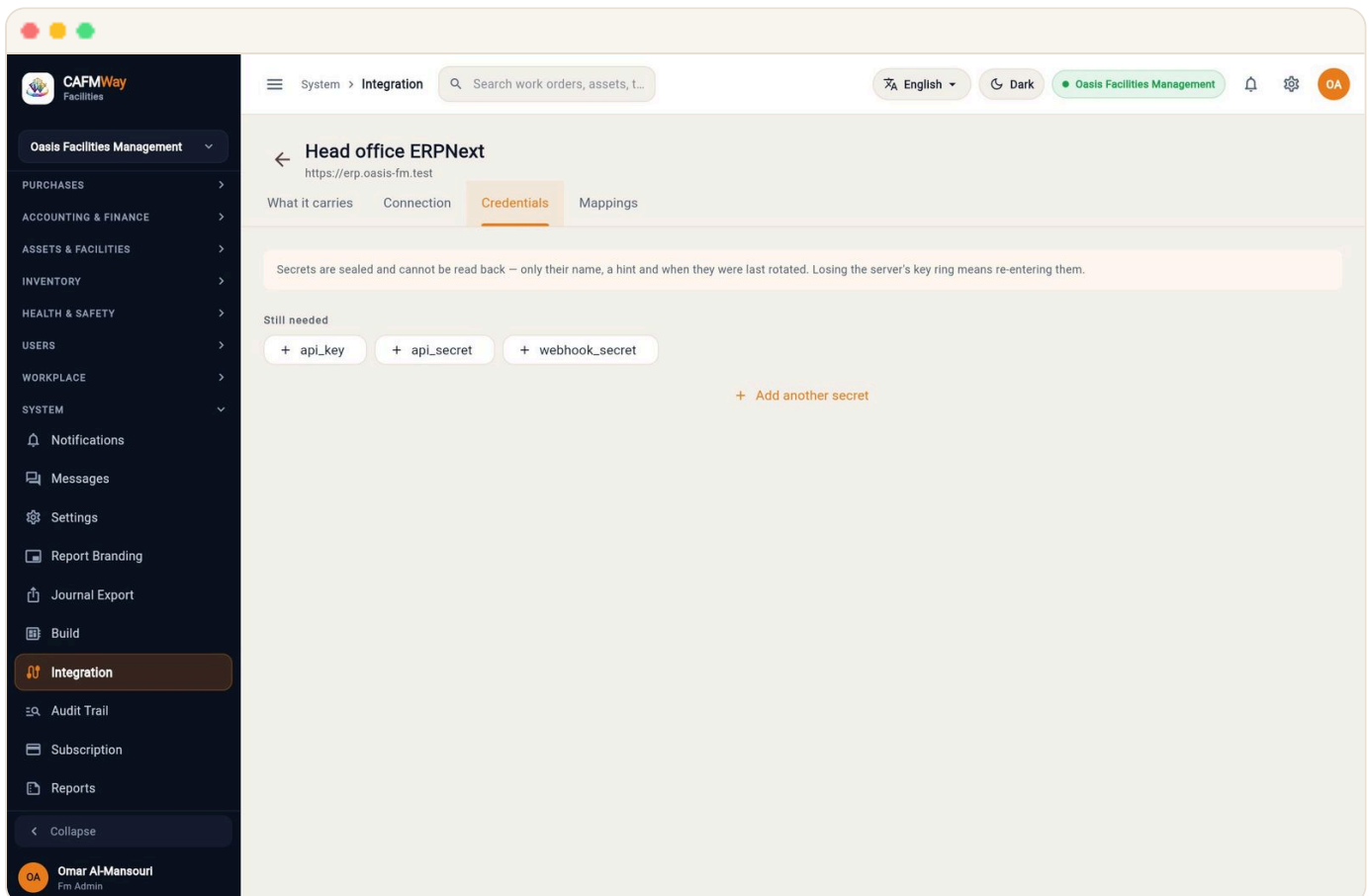


Figure 217 The Credentials tab of a new ERPNext connector listing the three secrets still needed.

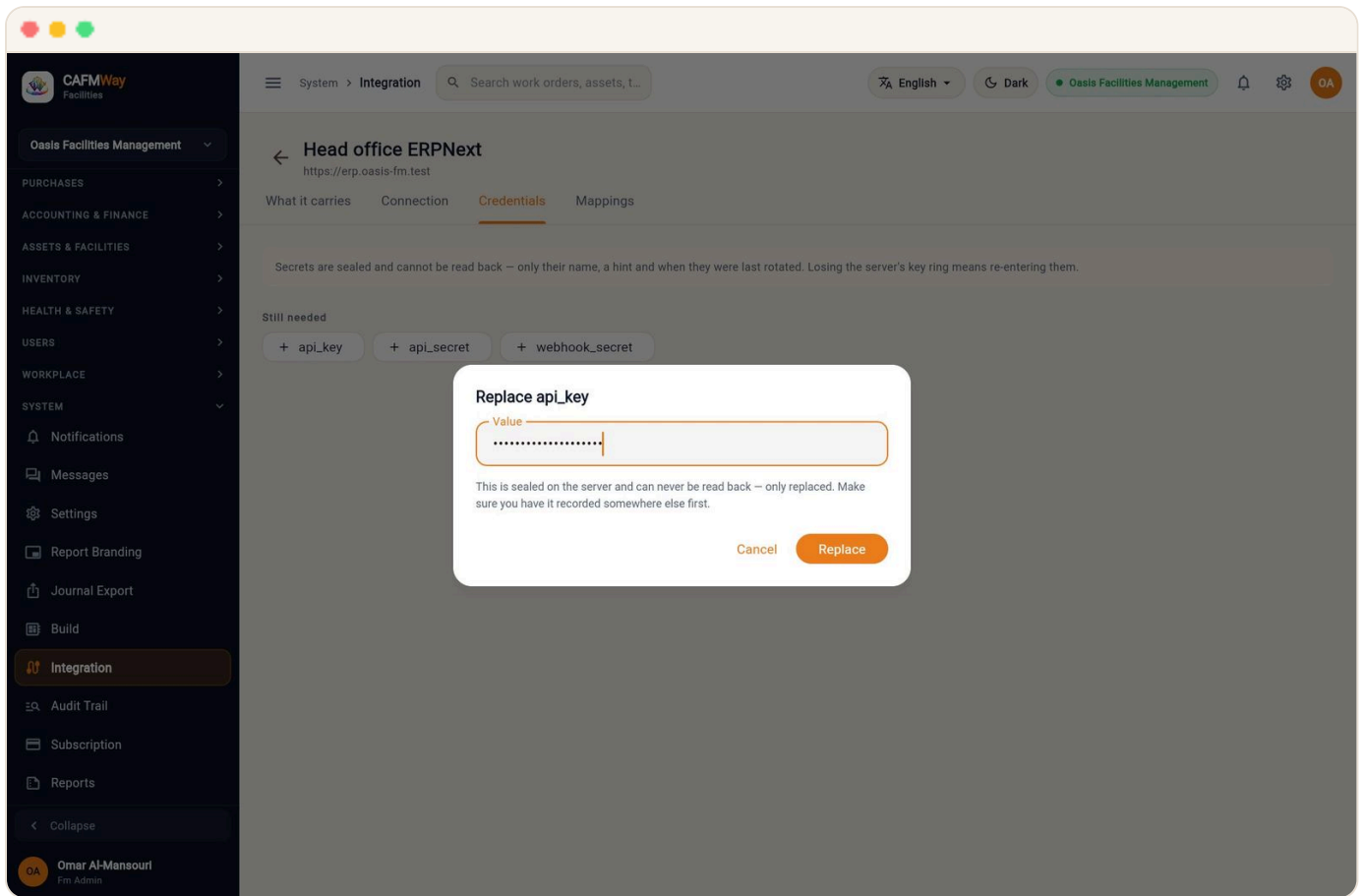


Figure 218 The secret dialog with the value masked.

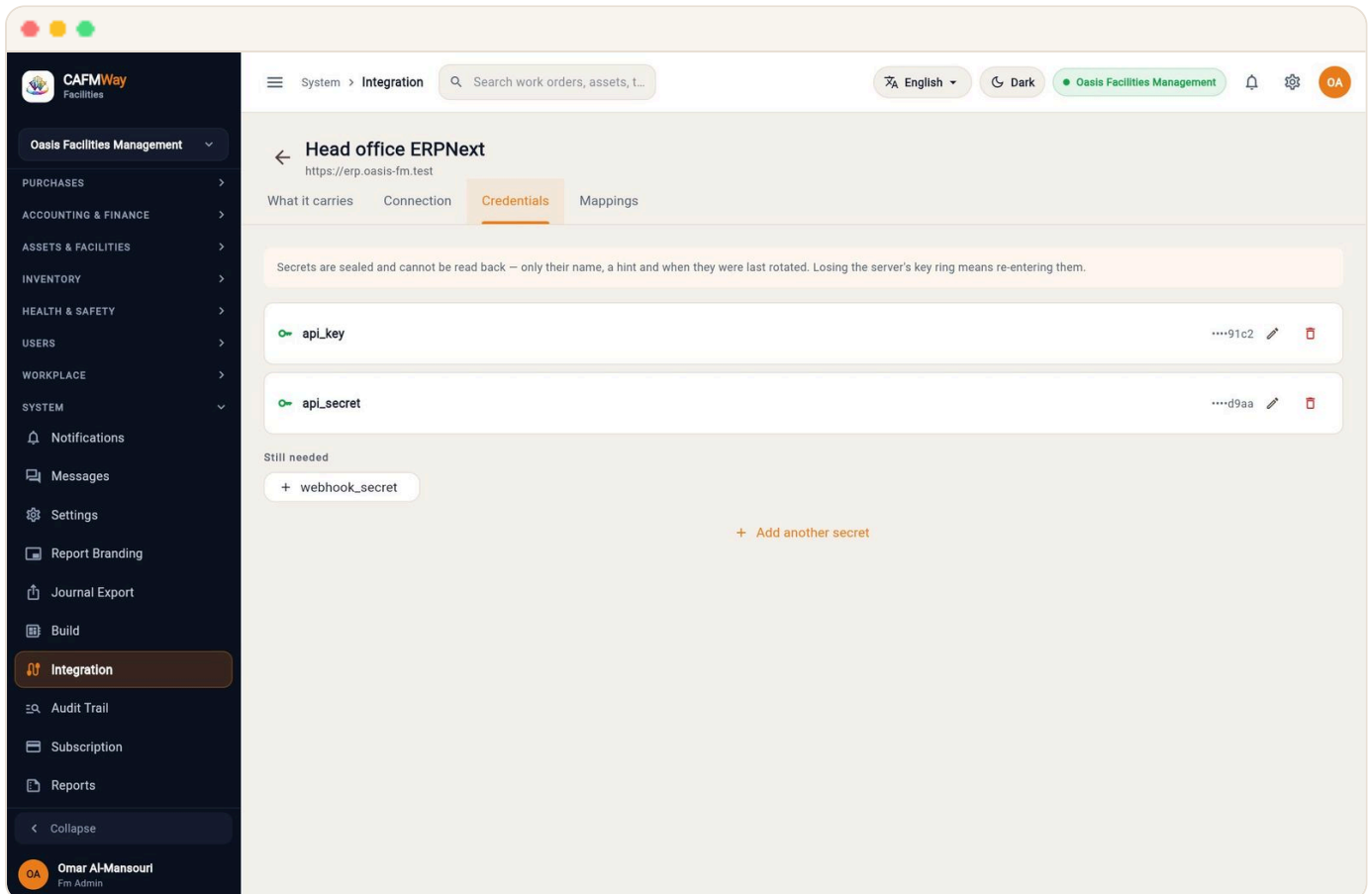


Figure 219 The Credentials tab after saving: each secret shows only its name and a masked hint.

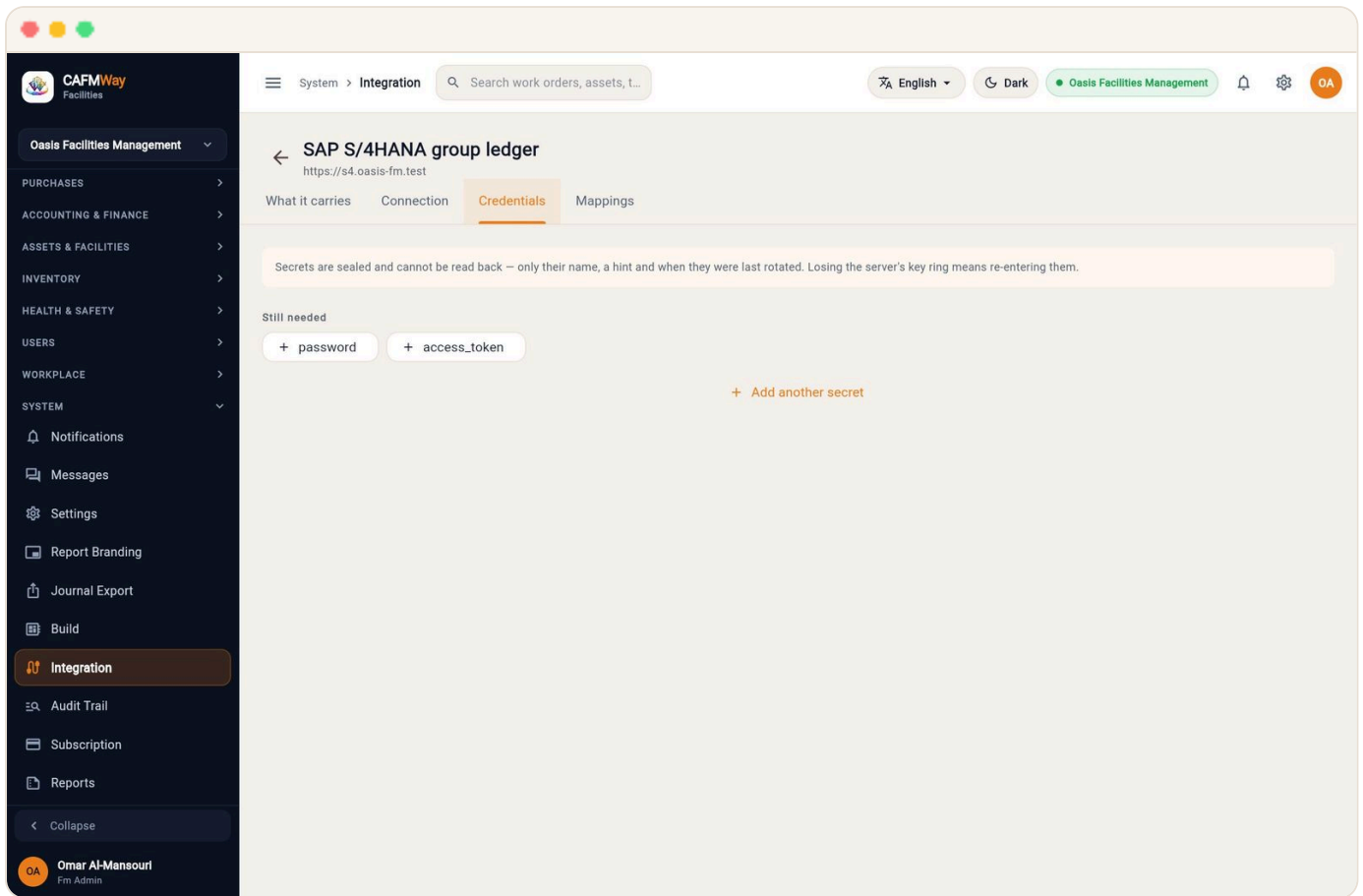


Figure 220 The Credentials tab of an SAP connector: the password is stored and the access token is still offered.

TIP

Keep a copy of every secret in your organisation's password manager. If the server's key ring is lost, the secrets must be entered again.

Test the connection

Who: FM Administrator, FM Manager

Where: Integration → connector card → **Test**, or **Configure** → **Connection** → **Test connection**

- 1 Click **Test** on the card, or **Test connection** on the Connection tab.
- 2 If CAFM Way reaches the ERP and the credentials work, the dialog shows **Connected**, the ERP version and **The credentials work**.
- 3 If not, the dialog shows **Could not connect** and the ERP's own reason. Correct the address, settings or secret, then test again.

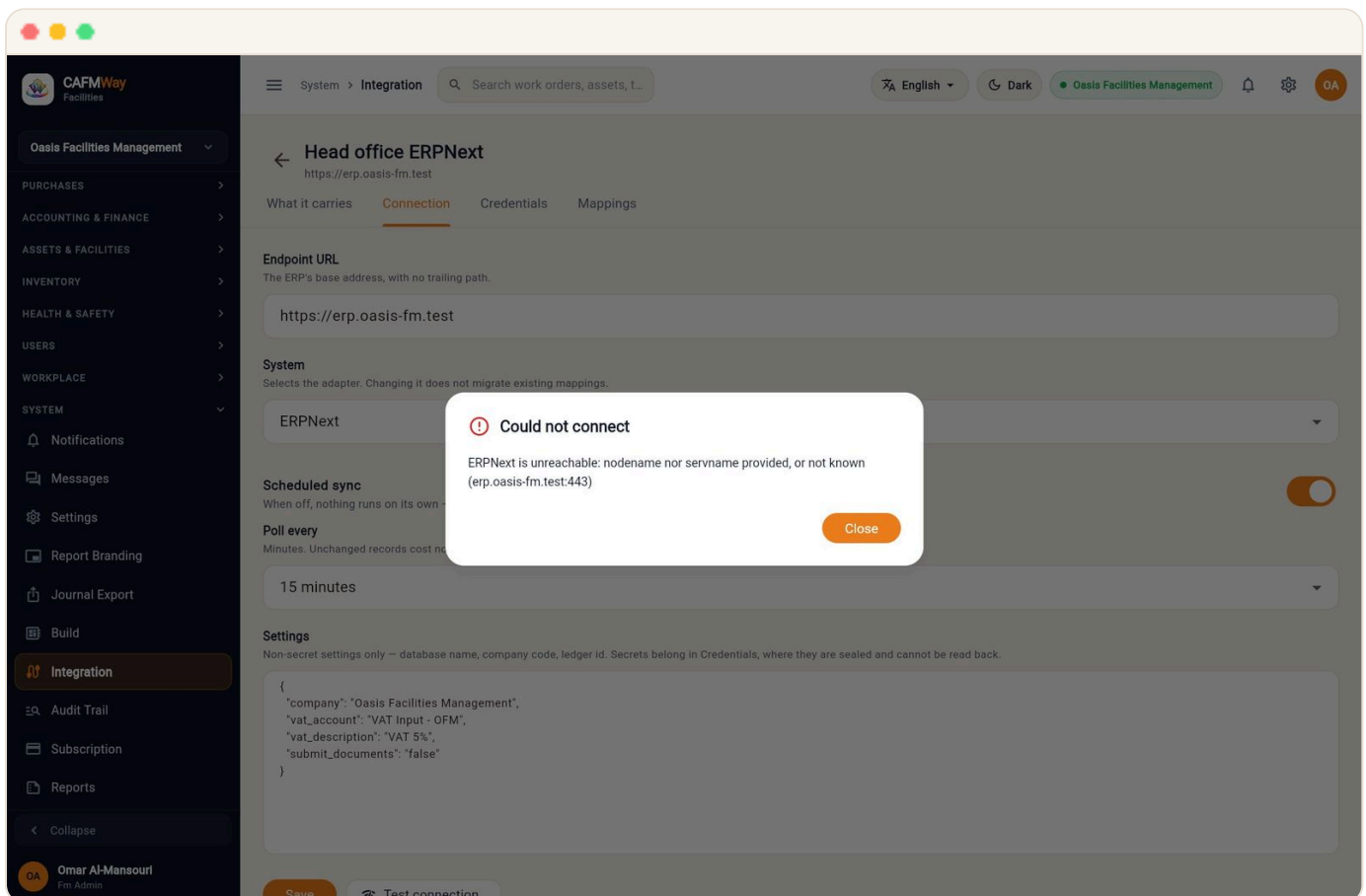


Figure 221 A failed test: the ERP host could not be found, so the dialog shows Could not connect with the reason.

The result of a test is saved on the connector. A failed test marks the card **Failing** and prints the reason on it. A successful test clears a paused connector.

Message after the ERP name	Usual cause
is unreachable: nodename nor servname provided, or not known	The host name in Endpoint URL does not exist, or DNS cannot resolve it.
has no 'client_secret' secret configured	A required secret is missing on the Credentials tab.
resolves only to addresses a connector may not reach	The host is on a private network that this installation does not allow.
HTTP 401 or 403 from the ERP	Wrong key, secret or password, or the integration user lacks rights in the ERP.

Map fields and translate codes

Who: FM Administrator, FM Manager

Where: Integration → **Configure** → **Mappings**

Each ERP adapter already knows the standard field names of its ERP. Use mappings only when your ERP differs from the standard.

- A **field mapping** says what this ERP calls one of CAFM Way's fields, for example a custom field that holds the VAT number.
- A **value mapping** translates a code, for example CAFM Way's unit `EA` is `Nos` in ERPNext and `Unit(s)` in Odoo.

Add a field mapping

- 1 Next to **FIELD MAPPINGS**, click **Add**. The **Map a field** dialog opens.
- 2 In **Entity**, choose the record type, for example `supplier`.
- 3 In **Our field**, type the CAFM Way field, for example `tax_id`.
- 4 In **Their field**, type the ERP field, for example `custom_vat_registration_no`.
- 5 In **Applies to**, choose **Both directions**, **Inbound only** or **Outbound only**.
- 6 In **Transform**, choose how the value is cleaned on the way: **None**, **UPPERCASE**, **lowercase**, **Trim spaces**, **Number**, **Yes / no** or **Date**.
- 7 Click **Save**.

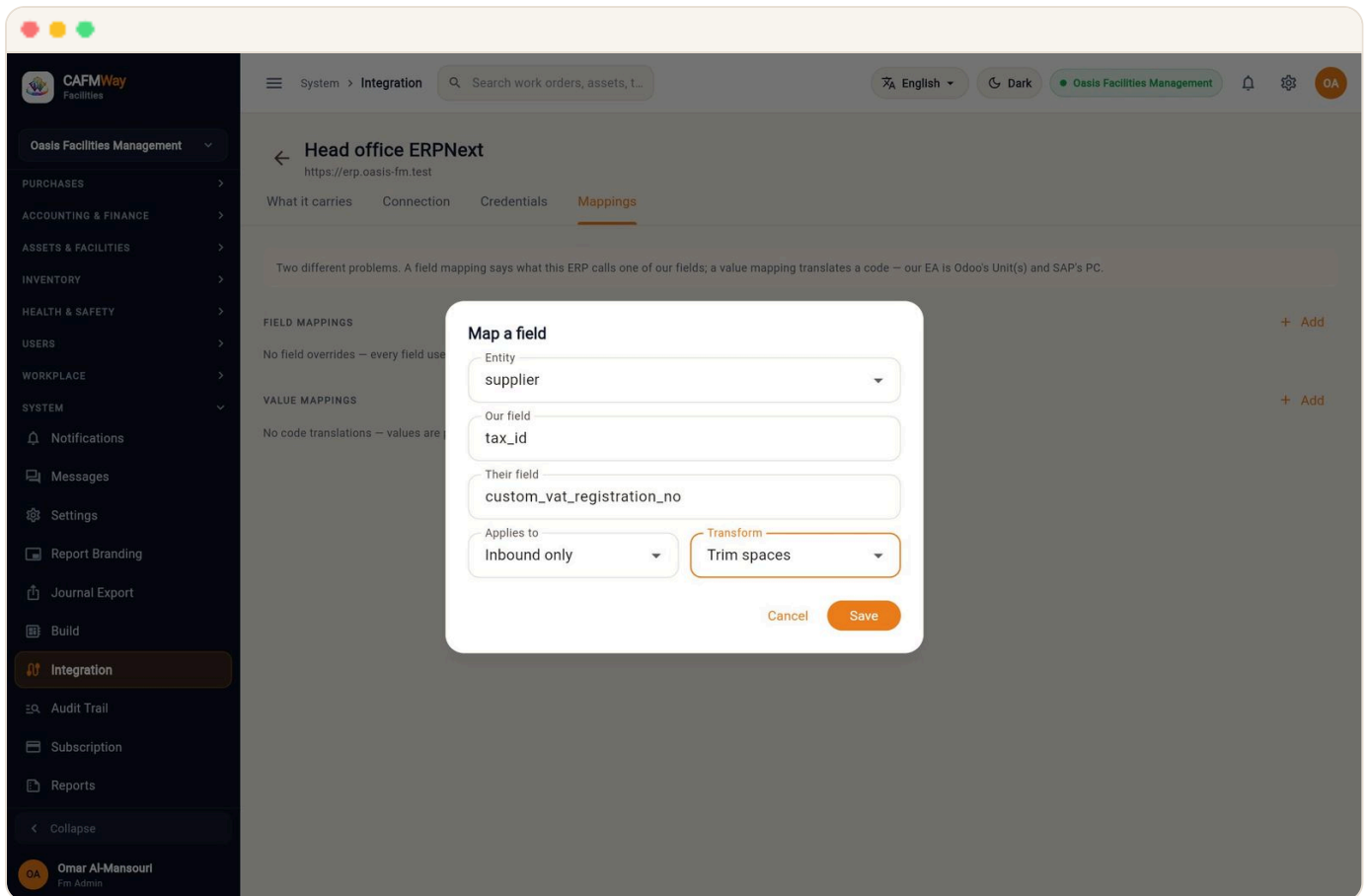


Figure 222 The Map a field dialog linking the supplier VAT number to a custom ERPNext field, inbound only, with spaces trimmed.

Add a value mapping

- 1 Next to **VALUE MAPPINGS**, click **Add**. The **Translate a code** dialog opens.
- 2 In **Kind of code**, choose **Unit of measure**, **Currency**, **Tax code**, **Payment terms**, **Supplier group** or **Warehouse type**.
- 3 In **Ours**, type the CAFM Way code, for example **EA**.
- 4 In **Theirs**, type the ERP code, for example **Nos**.
- 5 Click **Save**.

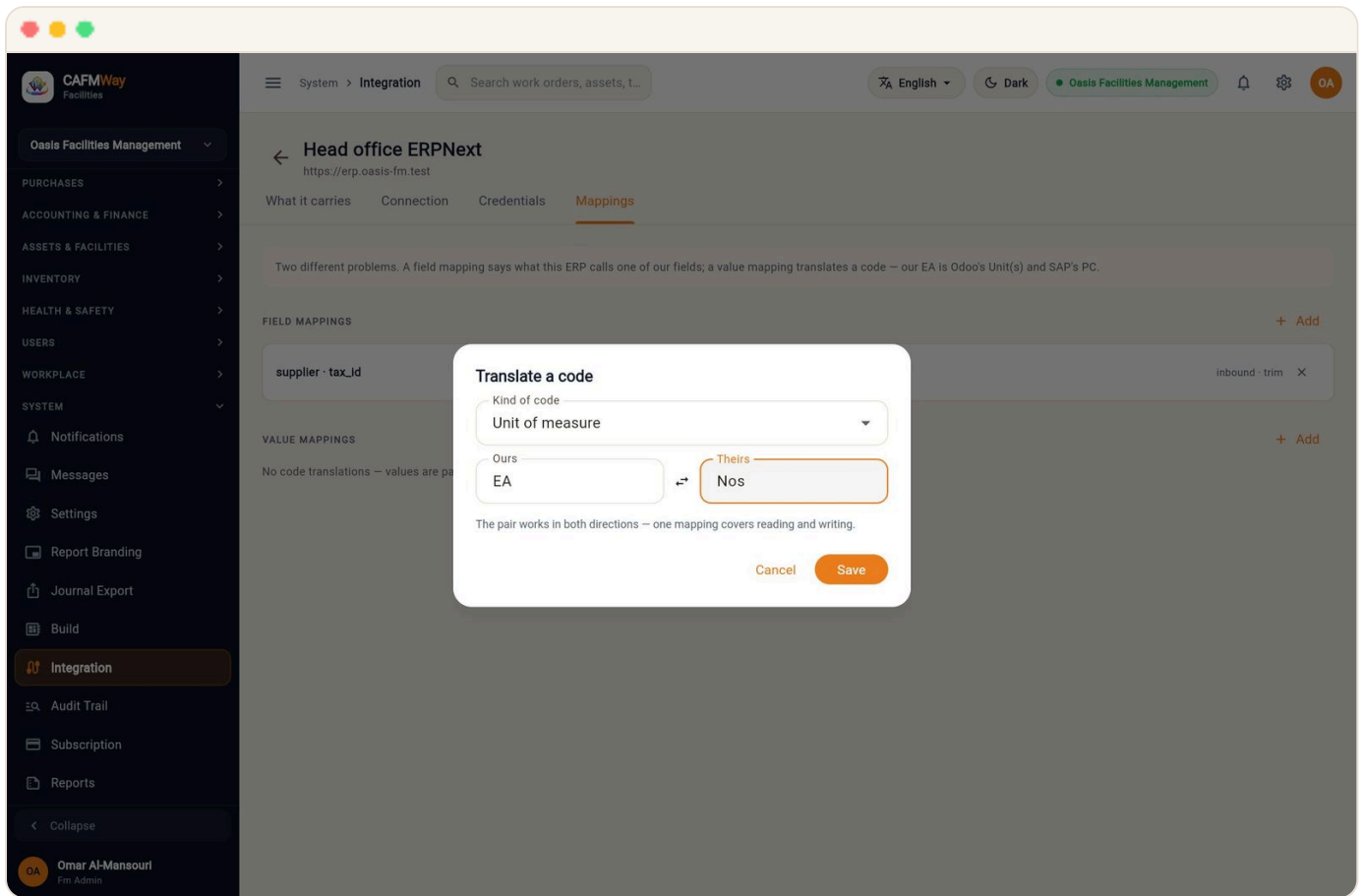


Figure 223 The Translate a code dialog mapping the CAFM Way unit EA to the ERPNext unit Nos.

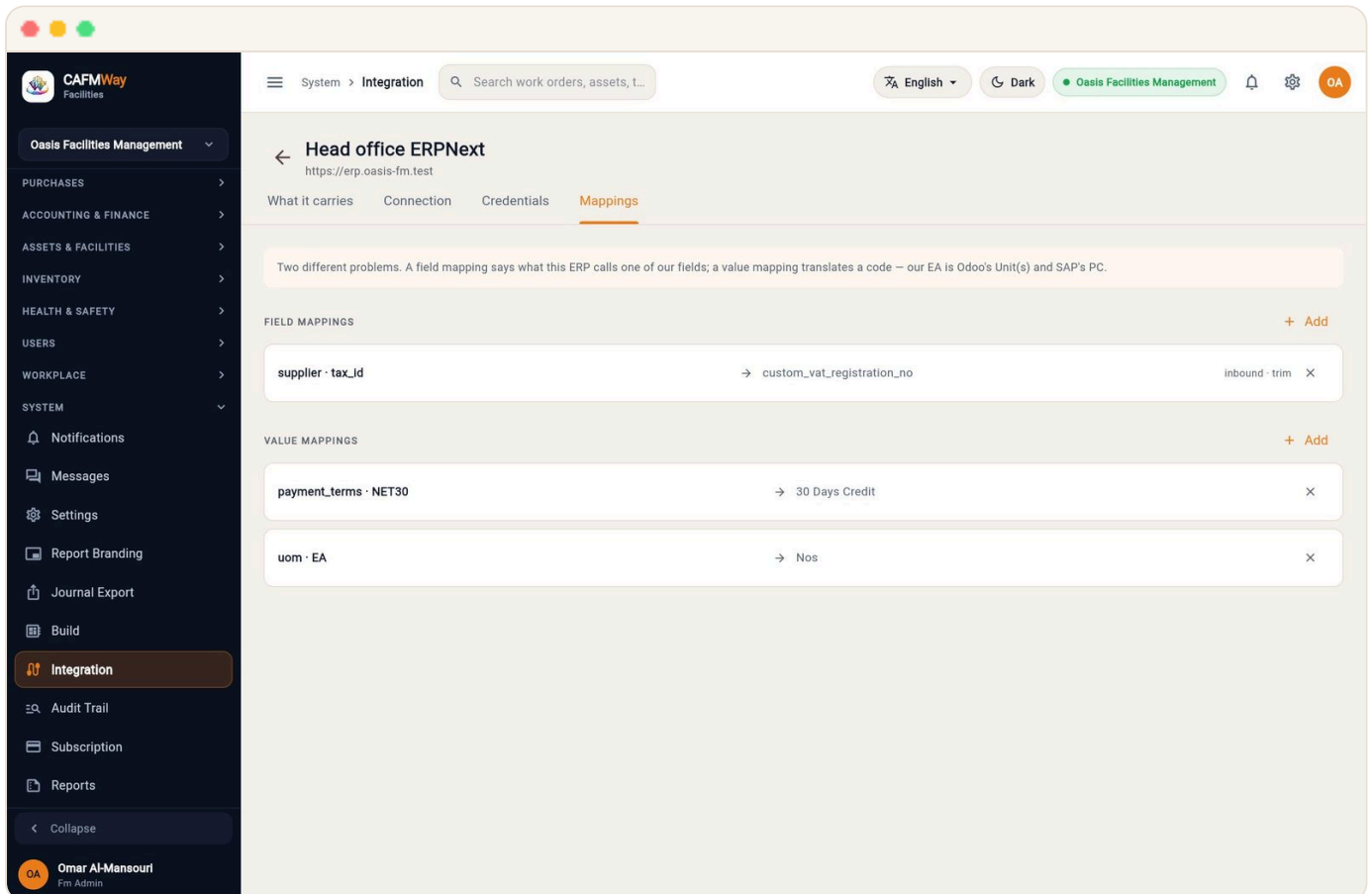


Figure 224 The Mappings tab with one field mapping and two value mappings.

To delete a mapping, click the ✕ at the end of its row.

BUSINESS RULE

A value mapping works in both directions. A code with no mapping is passed through unchanged. Saving a field mapping for the same entity, field and direction replaces the earlier one.

Choose what the connector carries

Who: FM Administrator, FM Manager

Where: Integration → **Configure** → **What it carries**

This tab lists every kind of record the integration knows. Each row has a switch, a status line, a direction and, for master data, **Preview** and **Run**.

- 1 Turn on the switch of each entity this connector should carry. The change is saved at once.
- 2 Leave the direction of master data at **ERP → CAFM**. Documents and journals show **CAFM → ERP**.
- 3 Read the status line under the name:
 - **Never synced:** the entity has not been pulled yet.
 - **Up to a date:** records changed up to that time have been pulled.
 - **Outbound only:** a document CAFM Way sends; it has no Preview or Run.
 - **This system does not carry it:** this ERP has no such data; the row is greyed out.

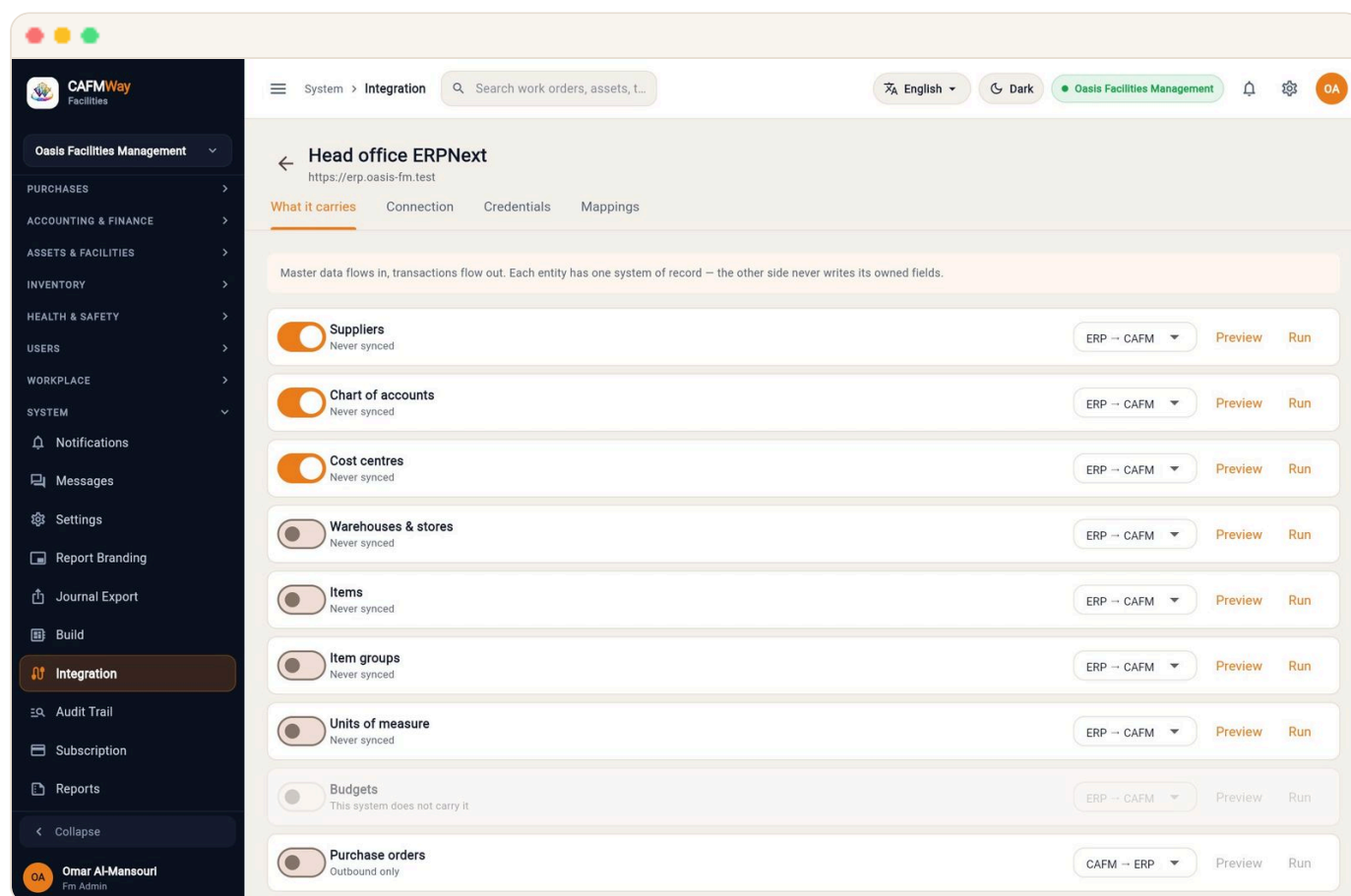


Figure 225 Master data rows of an ERPNext connector: suppliers, chart of accounts and cost centres switched on, ERP to CAFM.

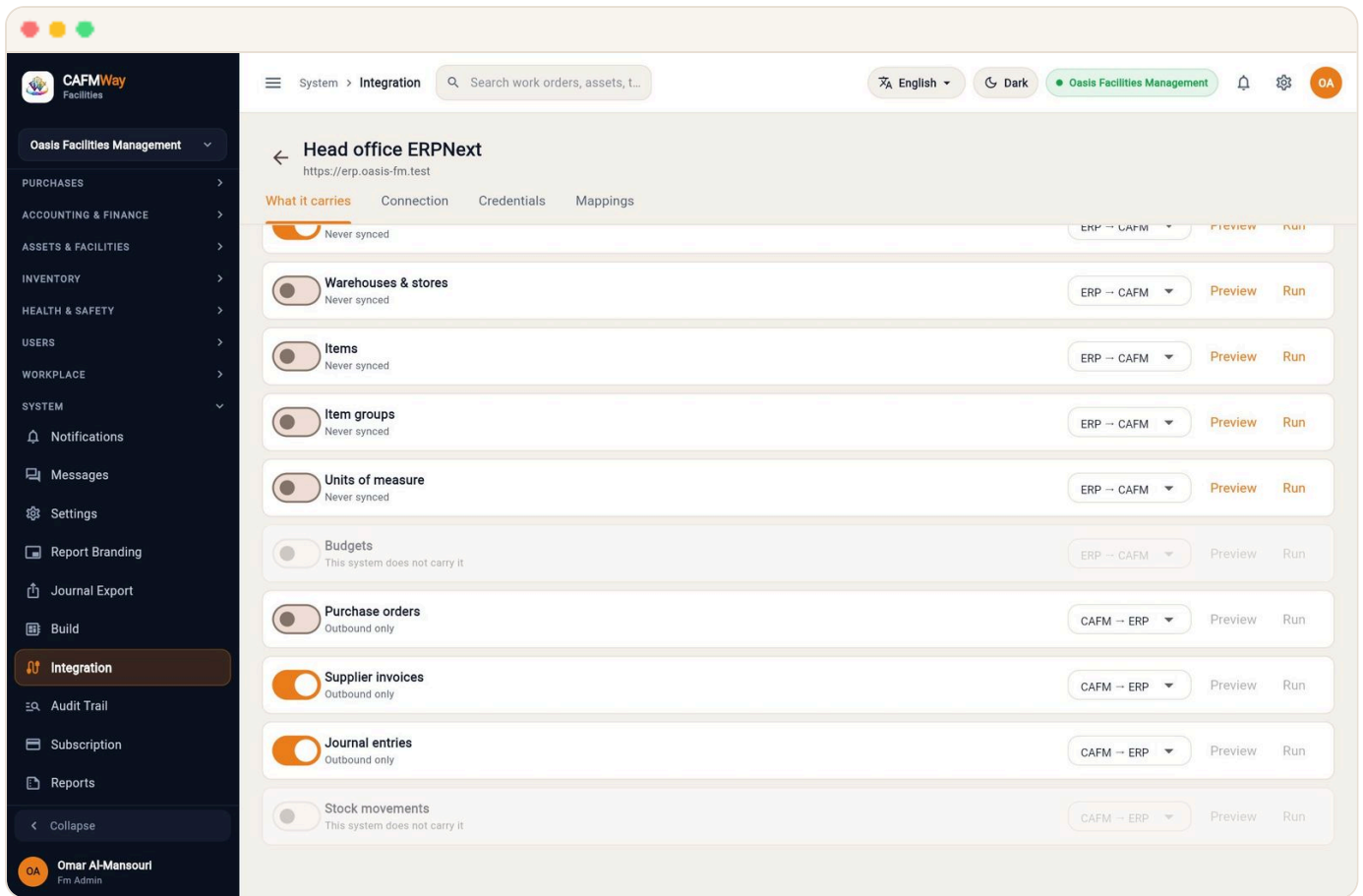


Figure 226 Document rows of the same connector: supplier invoices and journal entries switched on, CAFM to ERP.

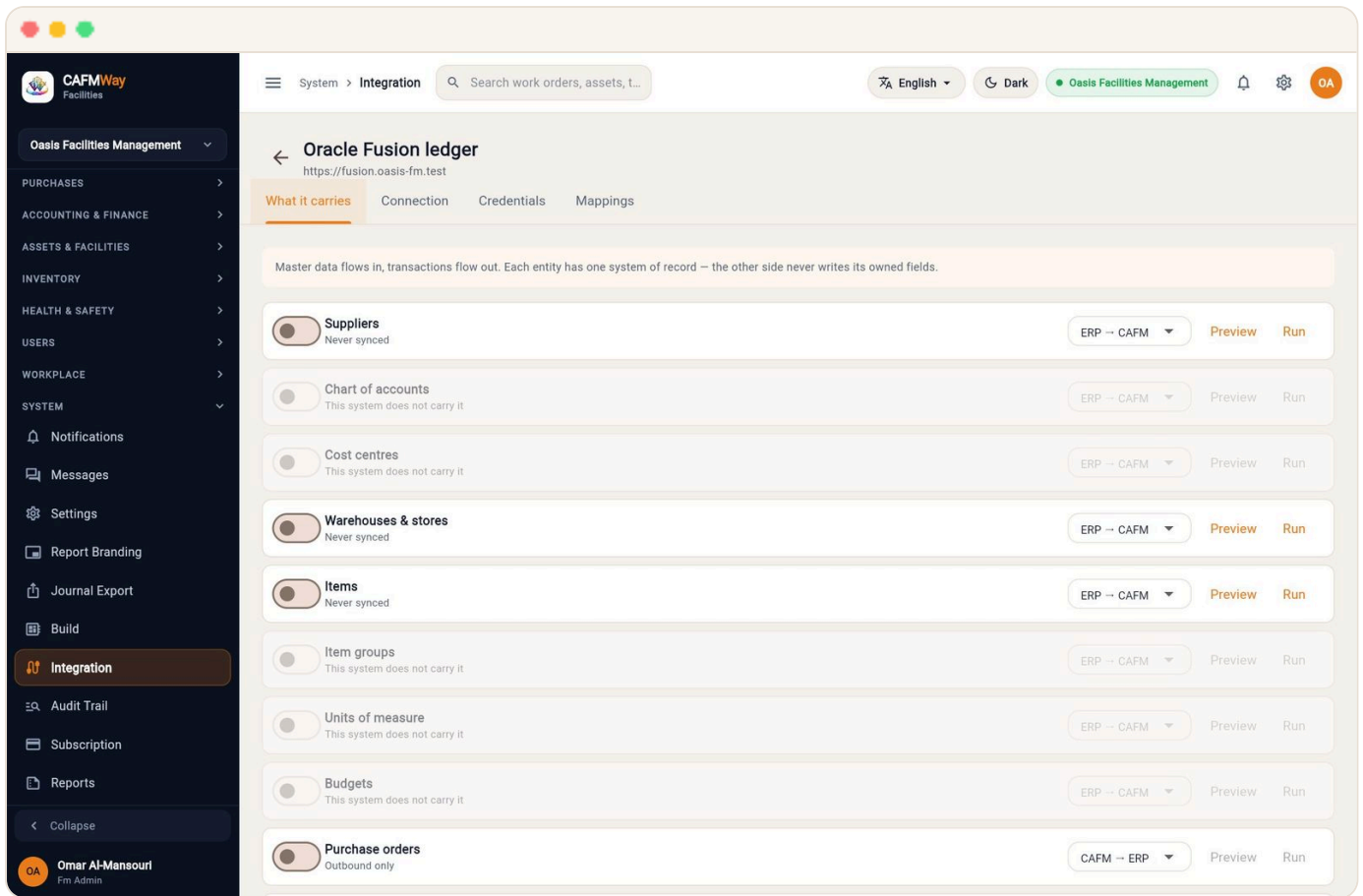


Figure 227 An Oracle Fusion connector: the chart of accounts, cost centres, item groups and units of measure are greyed out because this ERP does not carry them.

CAUTION

Choosing **Two-way** or **CAFM → ERP** on a master-data row does not send CAFM Way's suppliers, items or warehouses to the ERP. Master data is only received.

NOTE

Purchase orders can be switched on but are not delivered to any ERP yet. **Budgets** and **Stock movements** are greyed out for every ERP.

Pull master data from the ERP

Who: FM Administrator, FM Manager

Where: Integration → **Configure** → **What it carries** → **Preview / Run**

Always preview a pull before running it for the first time.

- 1 On the entity row, click **Preview**. CAFM Way reads the ERP and writes nothing. The dialog **Preview — nothing was written** shows:
 - **Received:** records the ERP returned.
 - **New:** records that would be created in CAFM Way.
 - **Updated:** linked records whose ERP values changed.
 - **Unchanged:** linked records with nothing new.
 - **Conflicts:** records changed on both sides.
 - **Failed:** records that cannot be applied, with the reason.
 - **Examples:** up to 20 sample records.
- 2 If the preview looks right, click **Run**. The dialog **Sync complete** shows the same counters for the real run.
- 3 Check the result in CAFM Way, for example PURCHASES → **Suppliers** or ACCOUNTING & FINANCE → **Chart of Accounts**.
- 4 For automatic pulls, turn on **Scheduled sync** on the Connection tab. At each interval CAFM Way pulls every switched-on entity in this order: units of measure, item groups, chart of accounts, cost centres, warehouses, suppliers, items.

If the ERP cannot be reached, the dialog is titled **Run failed** and shows the reason.

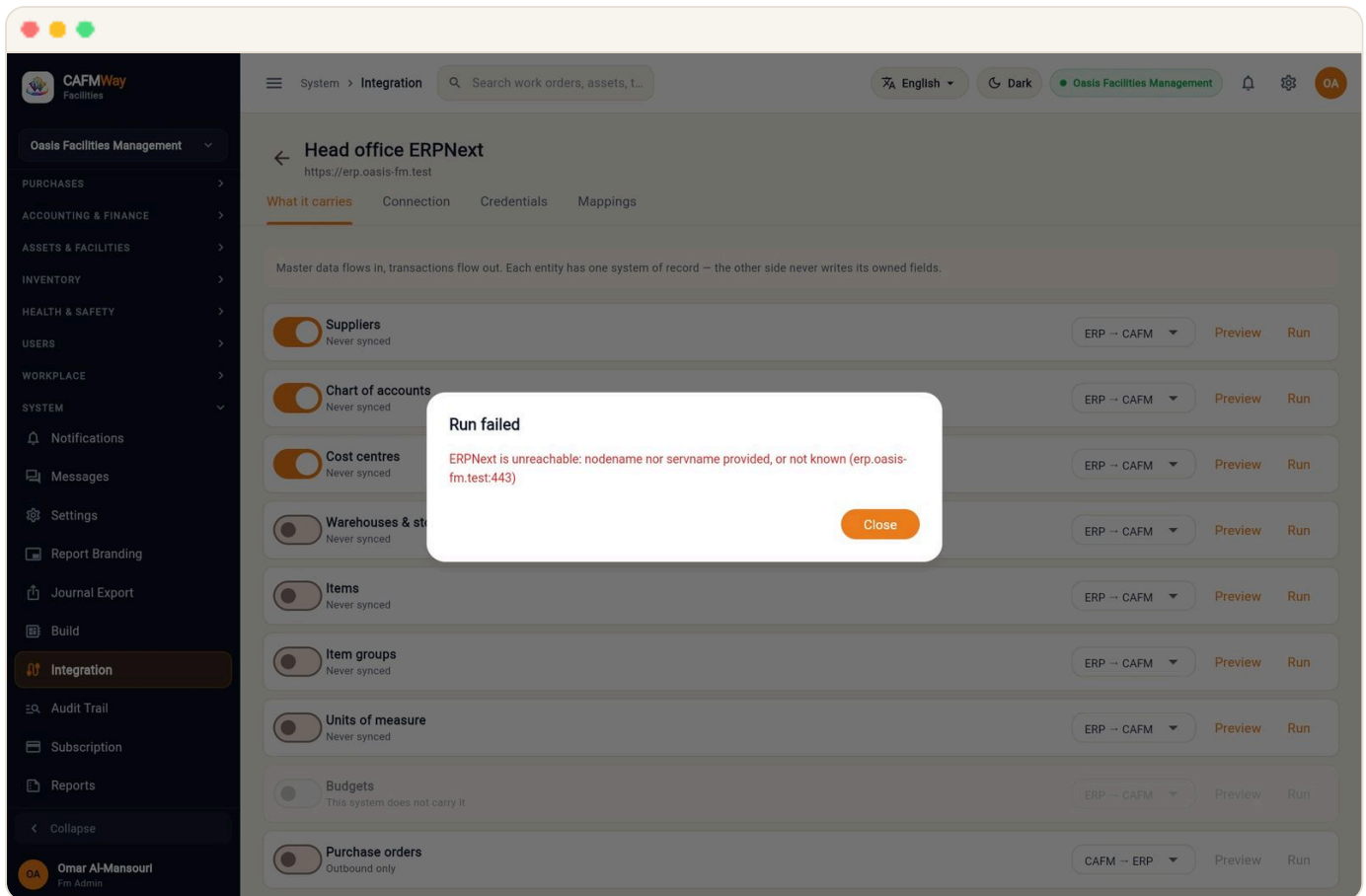


Figure 228 A preview against an ERPNext host that does not exist: Run failed, with the reason.

BUSINESS RULE

How incoming records are applied:

- Each ERP record is linked to one CAFM Way record by its ERP id. Renaming a record in the ERP updates the same CAFM Way record; it never creates a duplicate.
- A record whose content has not changed since the last pull is skipped without a write.
- A field the ERP leaves empty never blanks a value already in CAFM Way.
- If one record fails, the others are still applied, and the next pull tries the failed one again.
- Switching an entity off and on again keeps its position; it does not pull everything again.

CAUTION

If CAFM Way already has a record with the same code that is not linked to the ERP, for example a supplier created by hand before the integration, the incoming record fails. Rename or remove the local record, then run the pull again.

TIP

ERPNext and Odoo can call CAFM Way when a record changes, so the next pull starts within about a minute instead of waiting for the interval. Store a random `webhook_secret` on the Credentials tab and give your CAFM Way support contact the connector for the webhook address. The webhook only brings the pull forward; it never writes data itself. Oracle Fusion and SAP S/4HANA are pulled on the schedule only.

Send journals and documents to the ERP

Who: FM Administrator, FM Manager, Finance Officer

Where: Sidebar → SYSTEM → **Journal Export**; Integration → **What it carries**

Journal entries and supplier invoices leave CAFM Way through a send queue. Each item in the queue is one document for one connector. A background sender delivers the queue every 20 seconds.

A journal export batch collects a period's postings so that each posting is exported once:

- 1 On every connector that should receive journals, switch on **Journal entries** (CAFM → ERP) and turn on **Scheduled sync**.
- 2 Open **Journal Export** and click **New Batch**. The **New export batch** dialog opens.
- 3 In **Target system**, choose the ledger, for example **ERPNext**, and pick the period.
- 4 Click **Create**. The batch appears in the list with the status **Pending** and its entry count, debit and credit totals.

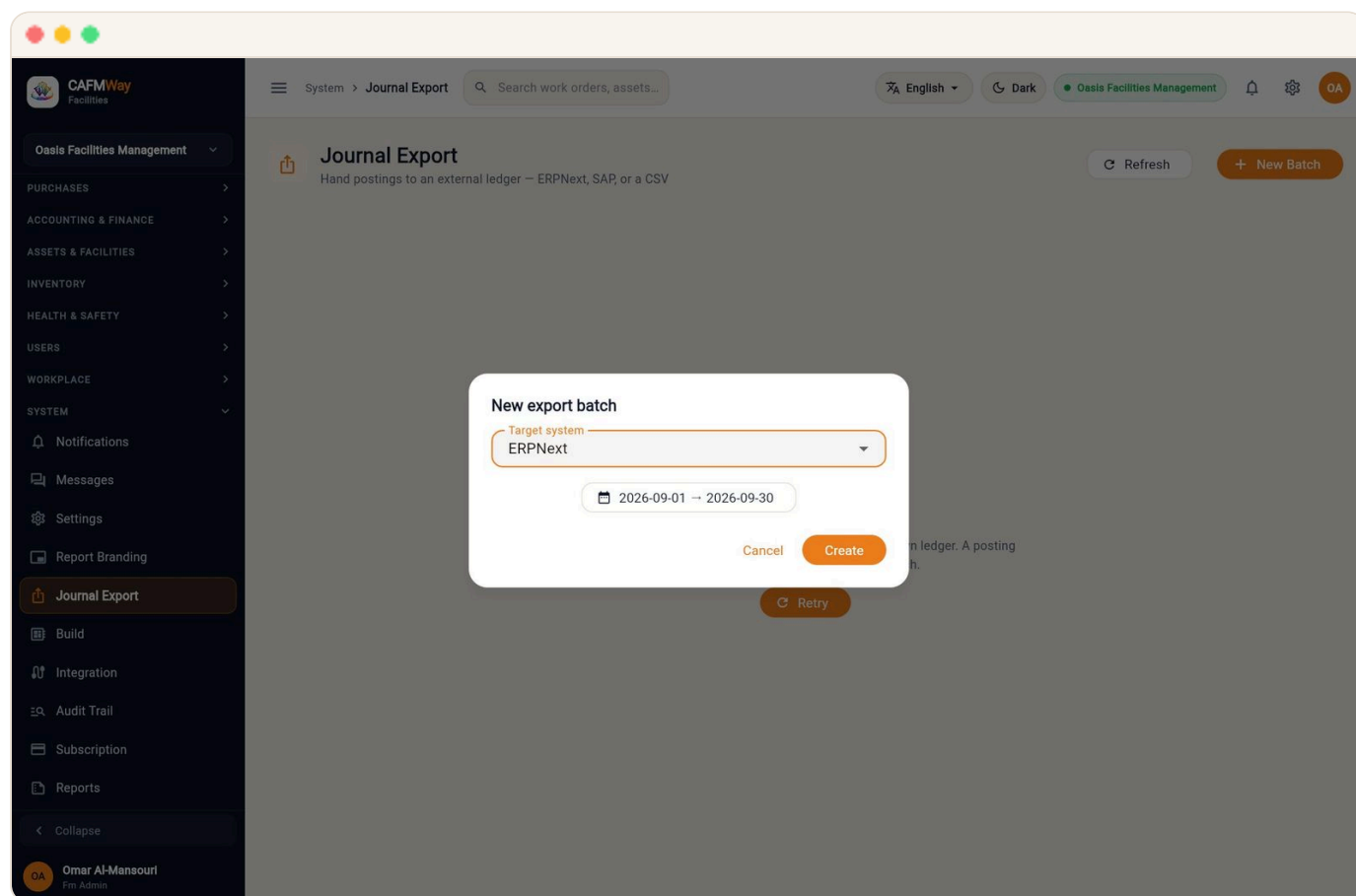


Figure 229 The New export batch dialog for September 2026 with ERPNext as the target.

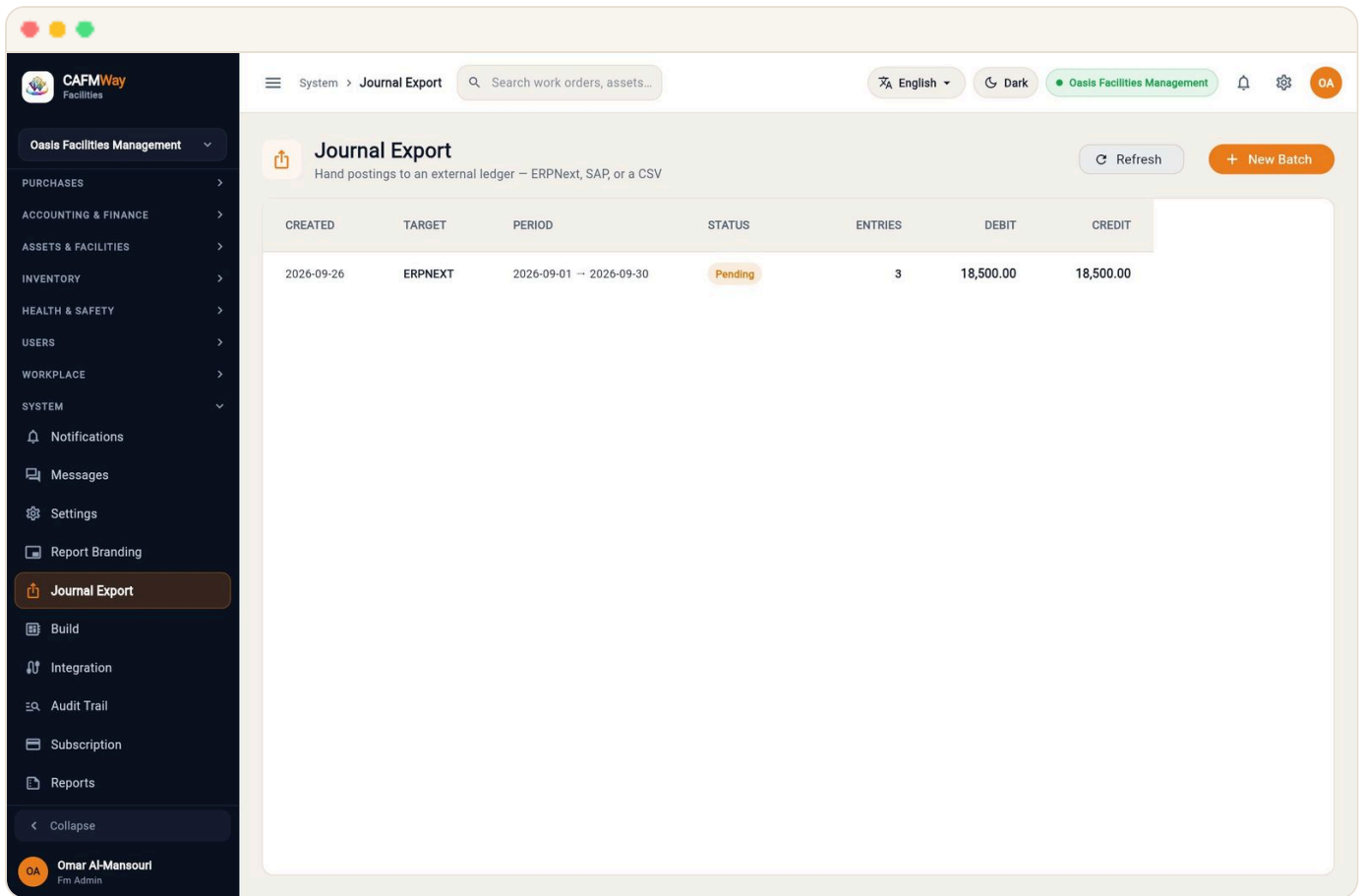


Figure 230 The Journal Export list with a pending September batch of three entries totalling 18,500.00.

When the batch is dispatched, CAFM Way groups its lines by voucher and queues one journal per voucher for every connector that has **Journal entries** switched on. The batch then shows **Dispatched**, and **Success** once the ERP has accepted every journal.

NOTE

The Journal Export page does not yet have buttons to dispatch a batch, confirm it or mark it failed, and there is no button to send a single supplier invoice. Your CAFM Way support contact carries out these steps for you until the buttons are added.

BUSINESS RULE

Before a journal leaves CAFM Way:

- It must balance at the currency's own precision (for example three decimals for KWD). An unbalanced voucher is refused.
- The company's base currency must be set in the accounting settings.
- Each line's account is the linked ERP account when the chart of accounts was pulled from the ERP; otherwise it is the CAFM Way account code. Odoo looks the account up by that code and refuses the journal if it has no such account. Oracle refuses an unlinked account unless `trust_account_codes` is `true`.
- ERPNext and Odoo receive company-currency amounts. Oracle and SAP receive transaction-currency amounts.

NOTE

Cost centres are not carried on exported journal lines yet. The ERP applies its own default cost centre to each line.

Monitor syncing, retries and failures

Who: FM Administrator, FM Manager
Where: Sidebar → SYSTEM → **Integration**

The top of the Integration page shows how many connectors are syncing or need attention. Click **Refresh** to reload the figures.

Tile	Meaning
Syncing	Connectors with Scheduled sync on and no fault.
Failing	Connectors whose last run or test failed.
Open conflicts	Records waiting in Held for review .
Queued to send	Documents waiting in the send queue.
Stuck	Documents that could not be delivered.

Each connector card shows a status chip, when it last synced, how many documents are queued, how many conflicts are open, and the last error in red.

Chip	Meaning
Healthy	Scheduled sync is on and the last run succeeded.
Partial	The last run had failures on some entities or records.
Failing	The last run or test failed. The reason is printed on the card.
Paused	After five failures in a row CAFM Way pauses the connector: 2 minutes after the fifth, 4 after the sixth, and so on up to 60 minutes. A successful test resumes it.
Behind	The last sync is older than twice the poll interval.
Not syncing	Scheduled sync is off.

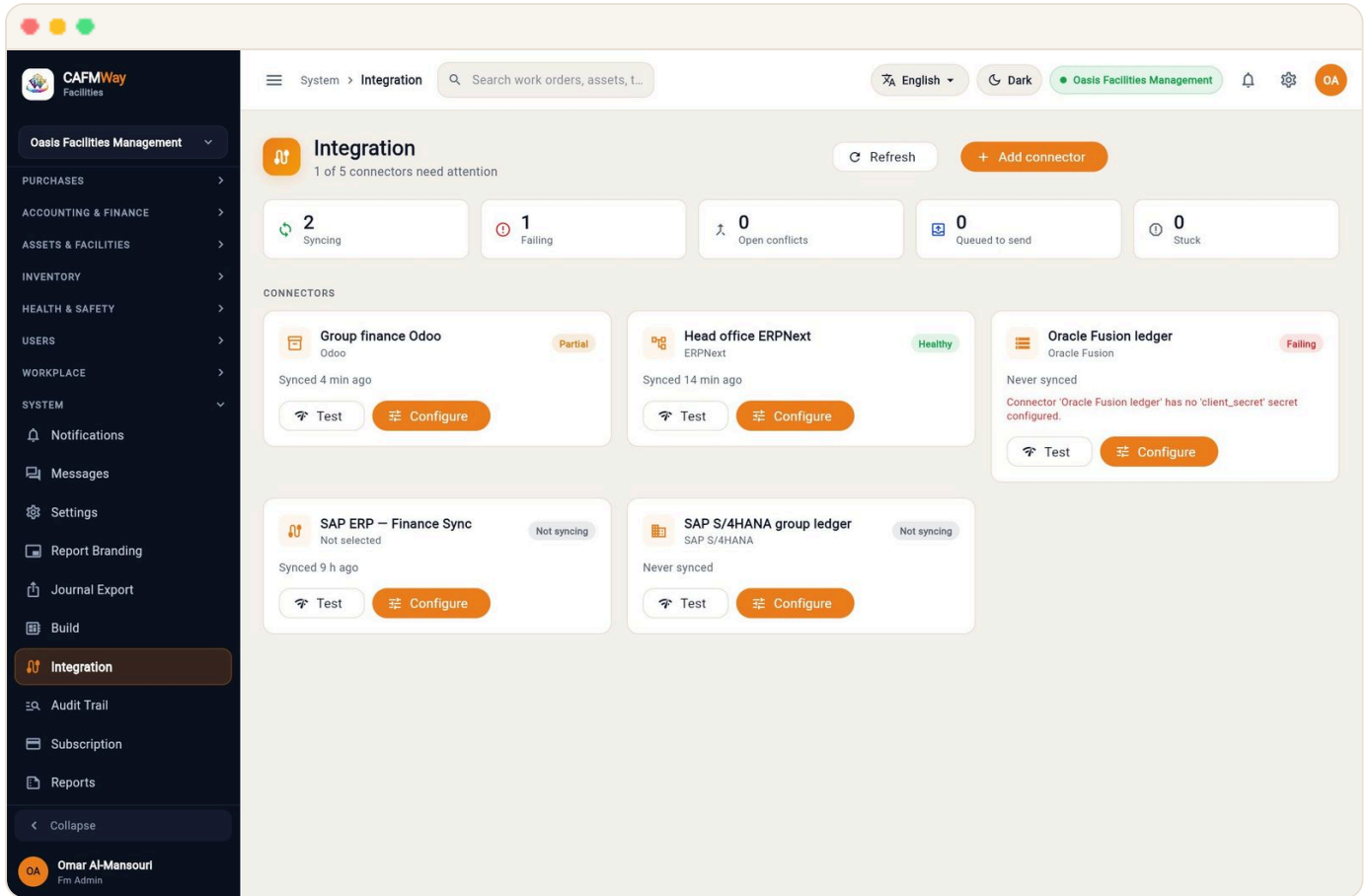
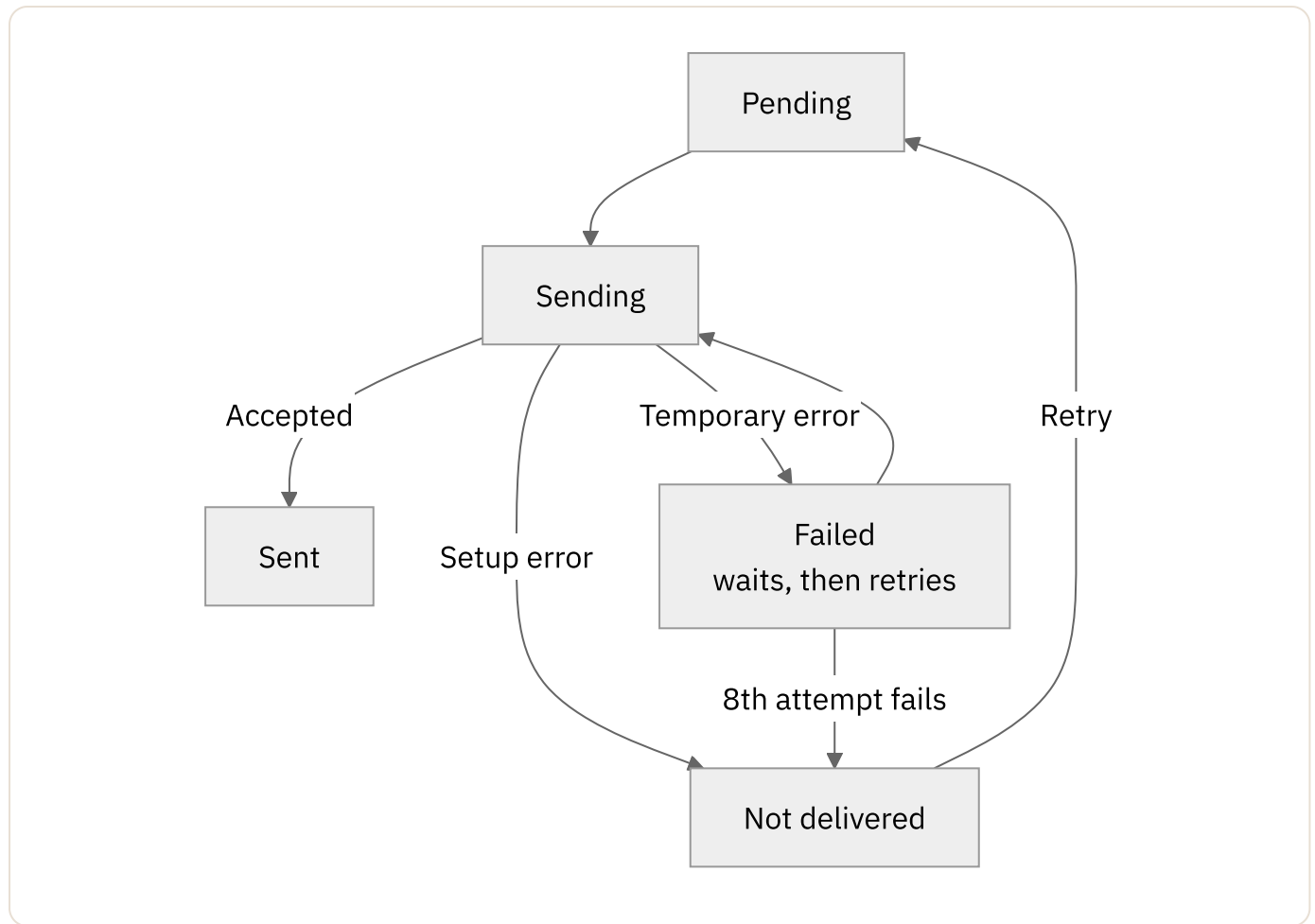


Figure 231 The Integration page with one Healthy, one Partial and one Failing connector; the Oracle card explains that its client secret is missing.

How the send queue retries



- A temporary error, such as a timeout or an ERP that is down, is retried after 30 seconds, 2 minutes, 10 minutes, 30 minutes, 2 hours and then every 6 hours.
- After 8 failed attempts, or at once on a setup error (a refused request, a missing secret, a missing setting such as `company`, or a switch such as `enable_journal_posting` that is off), the item moves to **Not delivered**.
- Each item carries a fixed identity, so a retry never creates a second queue entry for the same document.

Retry an item that was not delivered

- 1 On the Integration page, find the **Not delivered** section. It appears only when an item is stuck.
- 2 Read the error under the item. Fix its cause first, for example add the missing setting or secret.
- 3 Click **Retry**. The item returns to the queue with its attempt count reset, and the **Queued to send** tile goes up by one.

NOTE

The page lists only items that were not delivered. Pending, failed and sent items, and the run history of each pull, are not shown on screen yet.

Resolve conflicts

Who: FM Administrator, FM Manager

Where: Integration → **Held for review**

A conflict arises when the same record changed in CAFM Way and in the ERP since the last pull. CAFM Way does not guess; it holds the record for you.

- 1 On the Integration page, the **Held for review** section lists each held record with the fields that differ.
- 2 Click **Review**. A dialog compares **In CAFM** with **In the ERP**, changed fields first.
- 3 Choose one:
 - **Take theirs**: the ERP's values win. They are applied at the next pull, through the normal checks.
 - **Keep ours**: CAFM Way's values stay, and this ERP version is marked as seen.
 - **Ignore**: close the conflict without a decision.

BUSINESS RULE

A conflict can only be resolved once. Master data belongs to the ERP, so **Take theirs** is normally the right choice; correct the ERP if its values are wrong.

Worked examples

The three examples below follow what CAFM Way actually sends and receives. Names and numbers are demo data.

EXAMPLE

A supplier created in Odoo arrives in CAFM Way. The purchasing team in Odoo creates the vendor "Gulf HVAC Supplies WLL" with reference `SUP-GHV` , VAT number `QA300124578` , e-mail `accounts@gulfhvac.oasis-fm.test` and mobile `+974 5550 1842` . On the "Group finance Odoo" connector, **Suppliers** is switched on with **ERP → CAFM** and **Scheduled sync** runs every 15 minutes.

- 1 At the next interval CAFM Way reads Odoo partners with a supplier rank above zero, archived ones included.
- 2 **Preview** would show Received 1, New 1. The scheduled run creates the supplier and links it to the Odoo partner id.
- 3 The supplier appears in PURCHASES → **Suppliers** with code `SUP-GHV` .
- 4 If the partner is later archived in Odoo, the next pull marks the CAFM Way supplier as disabled.

Odoo field (<code>res.partner</code>)	CAFM Way supplier field
<code>id</code>	link to the ERP record
<code>ref</code> (or <code>OD00-</code> + id when empty)	Code
<code>name</code>	Name
<code>company_type</code> (<code>person</code> → individual)	Type
<code>email</code> , <code>phone</code> , <code>mobile</code>	E-mail, Phone, Mobile
<code>street</code> , <code>street2</code> , <code>city</code> , <code>zip</code>	Address lines, City, Postal code
<code>state_id</code> , <code>country_id</code>	State, Country
<code>vat</code>	Tax id
<code>active</code> = false	Disabled

EXAMPLE

A supplier invoice from CAFM Way becomes a Purchase Invoice in ERPNext. Supplier invoice PINV-2026-0012 from Gulf HVAC Supplies WLL, dated 28 September 2026, has two lines: 20 EA chiller filters at 150.00 and 10 kg of refrigerant R-410A at 95.00. Net 3,950.00, VAT 197.50, total 4,147.50 QAR. The "Head office ERPNext" connector has `company` = Oasis Facilities Management, `vat_account` = VAT Input - OFM, `vat_description` = VAT 5%, the value mapping EA → Nos, and **Supplier invoices** switched on (CAFM → ERP).

- 1 Suppliers were pulled from ERPNext first, so CAFM Way sends the ERPNext supplier id rather than its own code.
- 2 The invoice is queued and delivered as an ERPNext Purchase Invoice. With `submit_documents` at `true` it is submitted; with `false` it stays a draft.
- 3 ERPNext computes 3,950.00 from the items and adds the VAT as an "Actual" charge of 197.50, so the ERPNext total is 4,147.50, the same as in CAFM Way.

CAFM Way invoice	ERPNext Purchase Invoice
Supplier (linked)	<code>supplier</code>
Connector setting <code>company</code>	<code>company</code>
Posting date	<code>posting_date</code> , <code>bill_date</code>
Invoice number PINV-2026-0012	<code>bill_no</code>
Due date	<code>due_date</code>
Currency <code>QAR</code> (value mapping applied)	<code>currency</code>
Description	<code>remarks</code>
Line item code, description	<code>items[].item_code</code> , <code>item_name</code> , <code>description</code>
Line quantity, unit <code>EA</code>	<code>items[].qty</code> , <code>items[].uom</code> = <code>Nos</code>
Line rate	<code>items[].rate</code>
VAT amount 197.50	<code>taxes[]</code> : <code>charge_type</code> Actual, <code>account_head</code> VAT Input - OFM, <code>tax_amount</code> 197.50

An invoice without lines is sent as one line for the net total. An invoice with no lines and no total is refused.

EXAMPLE

The September accrual journal is posted to SAP S/4HANA. Journal `JE-2026-00002`, dated 30 September 2026 in QAR, accrues the month's costs: debit 6200 Rent and Utilities 12,000.00, debit 5300 Subcontractor Costs 6,500.00, credit 2140 Accrued Expenses 18,500.00. The "SAP S/4HANA group ledger" connector has `company_code` = `1010`, `document_type` = `SA`, **Journal entries** switched on (CAFM → ERP) and **Scheduled sync** on. The SAP team has validated a test document, and `enable_journal_posting` has been set to `true`.

- 1 The Finance Officer creates the September batch on **Journal Export**. It holds three entries, debit 18,500.00, credit 18,500.00.
- 2 On dispatch, the voucher is queued once for the SAP connector and sent to `API_JOURNALENTY_SRV` as one journal entry with three items.
- 3 SAP returns the accounting document number, and the queue item is marked sent.

CAFM Way journal	SAP journal entry
Connector setting <code>company_code</code>	<code>CompanyCode</code> (header and each item)
Connector setting <code>document_type</code>	<code>AccountingDocumentType</code> = <code>SA</code>
Voucher number <code>JE-2026-00002</code>	<code>DocumentReferenceID</code>
Remarks (cut to 25 characters)	<code>DocumentHeaderText</code>
Posting date	<code>DocumentDate</code> , <code>PostingDate</code>
Line account (linked SAP account, else the CAFM Way code)	<code>to_JournalEntryItem[] .GLAccount</code>
Debit or credit	<code>DebitCreditCode</code> <code>S</code> (debit) or <code>H</code> (credit)
Line amount in the transaction currency	<code>AmountInTransactionCurrency</code> : <code>amount</code> 12000.00, <code>currencyCode</code> QAR
Line reference (cut to 50 characters)	<code>DocumentItemText</code>

While `enable_journal_posting` is `false`, the journal is not sent. It goes straight to **Not delivered** with the message that SAP financial posting is disabled for this connector. Turn the setting on, then click **Retry**.

NOTE

An approved purchase order in CAFM Way is not created in the ERP yet. Only journal entries and supplier invoices are delivered today.

Dashboards and KPIs

This part covers the screens you look at before you act: the Dashboard, the Executive Dashboard, global search and the two KPI screens. It is written for FM managers, supervisors and helpdesk staff who start their day in the web app.

The Dashboard

Who: every user; the figures follow the records the user may read

Where: Sidebar → OVERVIEW → **Dashboard**

The Dashboard is the first page after sign-in. It shows the state of today's work and gives one-click shortcuts to the most common tasks.

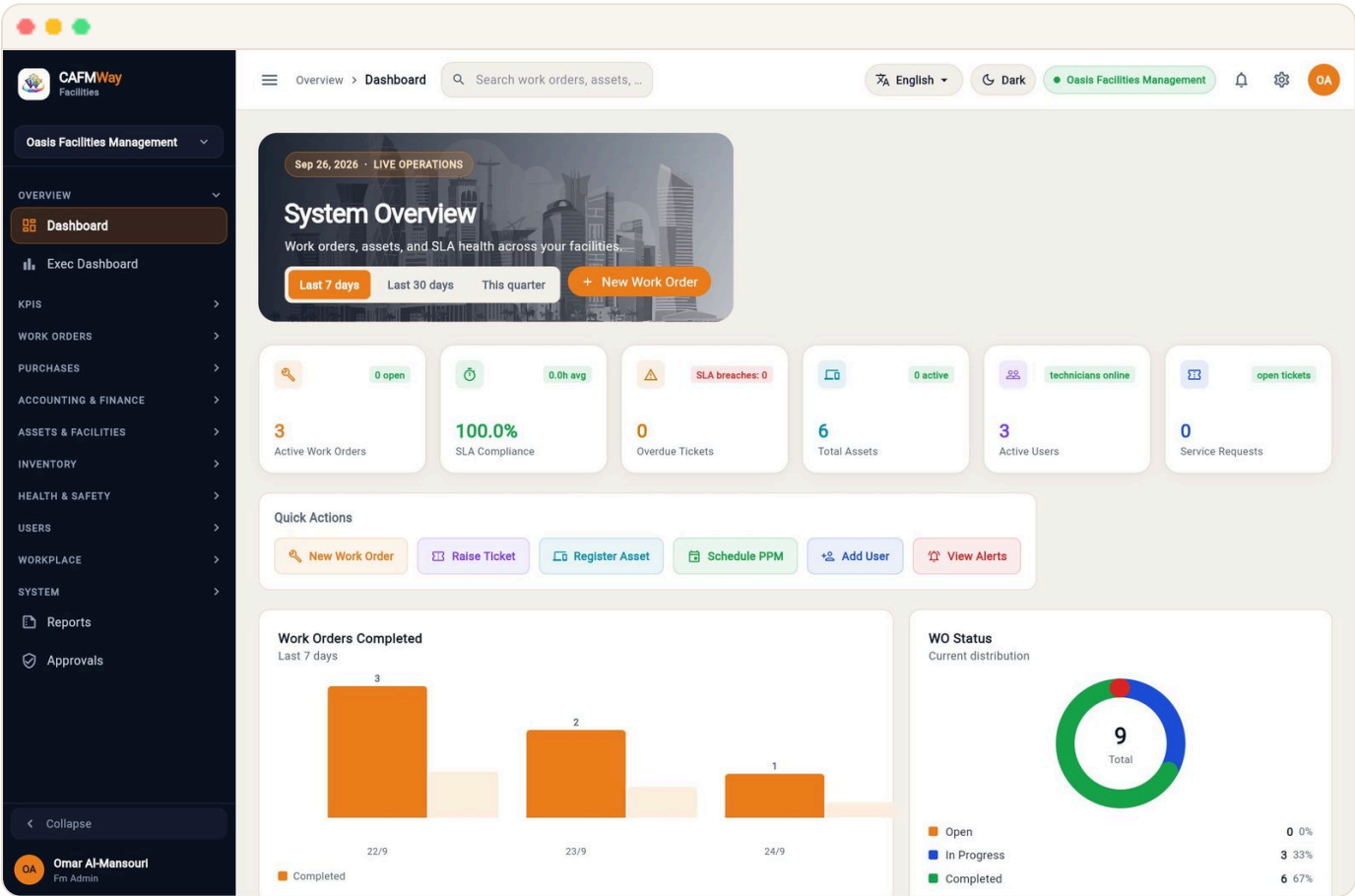


Figure 232 The Dashboard with the System Overview banner, six KPI cards, Quick Actions and the work order charts.

The page has four areas:

Area	What it shows
System Overview banner	Today's date, a period switch (Last 7 days , Last 30 days , This quarter) and a New Work Order button. The period changes the Work Orders Completed chart.
KPI cards	Active Work Orders , SLA Compliance , Overdue Tickets , Total Assets , Active Users and Service Requests , each with a small badge (open count, average time, SLA breaches, and so on).
Quick Actions	New Work Order , Raise Ticket , Register Asset , Schedule PPM , Add User , View Alerts .
Charts and lists	Work Orders Completed by day, WO Status (open, in progress, completed, overdue), Recent Activity with View All , and Active Alerts .

- 1 Choose the period in the banner. The **Work Orders Completed** chart redraws for that period.
- 2 Click a quick action to jump straight to the form. For example, **Register Asset** opens the asset wizard and **Schedule PPM** opens the PPM calendar.
- 3 Click **View Alerts** to open the alerts panel. It lists SLA breaches and critical issues; when there are none it reads **No active alerts**.
- 4 Click **View All** under **Recent Activity** to open the full work order list.

TIP

Raise Ticket opens the service request form, which has no entry of its own in the sidebar. Use this button, or the requestor app, to log a request on someone's behalf.

Find anything with search

Who: every user

Where: the search box in the top bar, or press **⌘K** (Ctrl+K on Windows)

Global search finds work orders, service requests, assets and locations by number, code or words in the title.

- 1 Click **Search work orders, assets, tickets...** in the top bar, or press **⌘K**. Before you type, the box offers quick links to **Work Orders, Assets, Reports** and **Settings**.
- 2 Type at least part of a number, code or title, for example **HVAC** or **chiller**. Results appear as you type, grouped by record type.
- 3 Use the arrow keys to move through the list and press **Enter** to open the selected record, or click it. Press **Esc** to close the box.

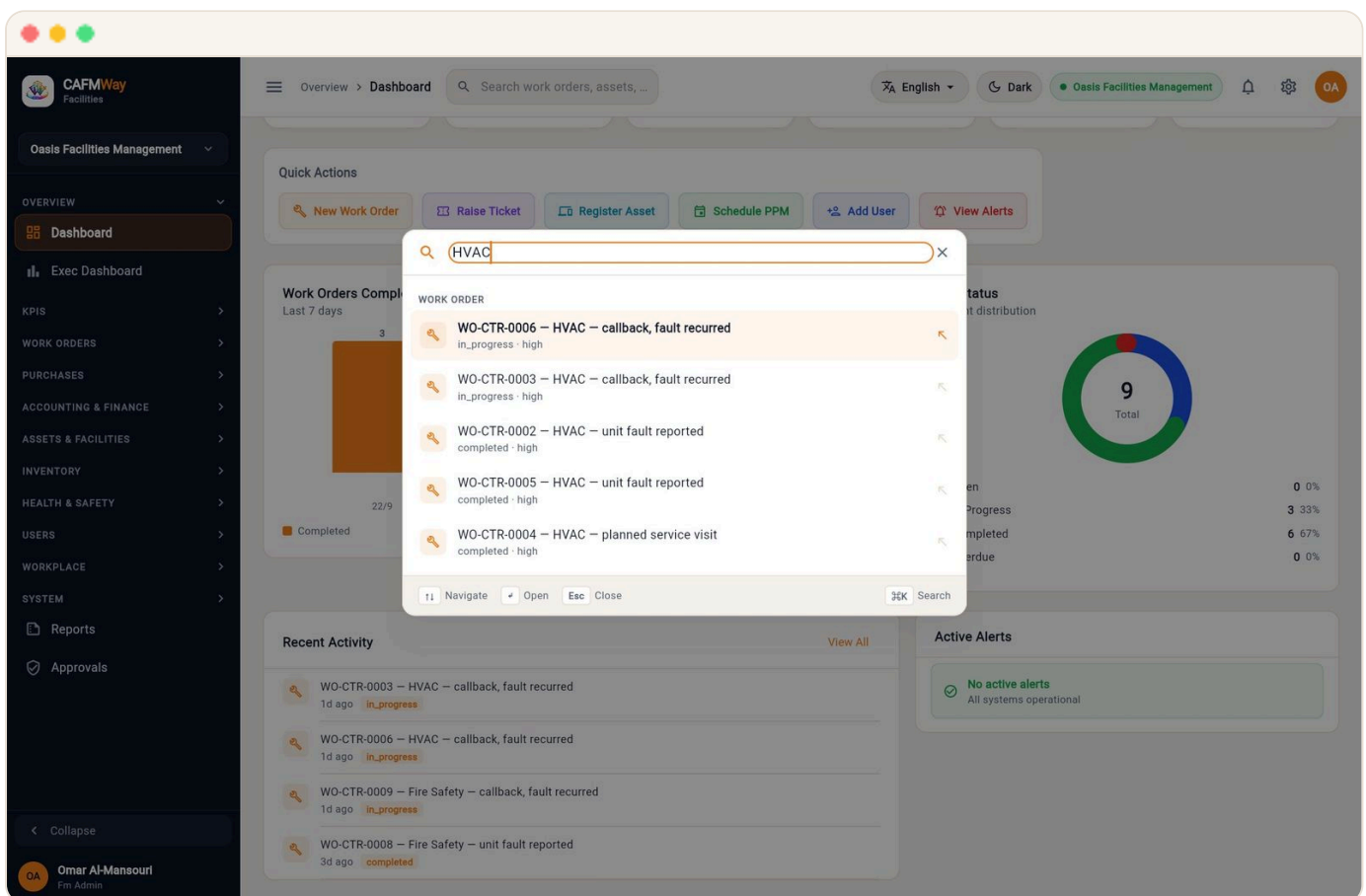


Figure 233 Global search listing the HVAC work orders that match the typed text.

TIP

An asset code such as `0B-5140-AR1-B1-HVC-CHL001` opens the asset directly. Location codes work the same way.

Executive dashboard

Who: FM Administrator, FM Manager and any role with the report permission on dashboards

Where: Sidebar → OVERVIEW → **Exec Dashboard**

The Executive Dashboard is a one-page summary for management: requests, work orders, SLA and spend for the financial year.

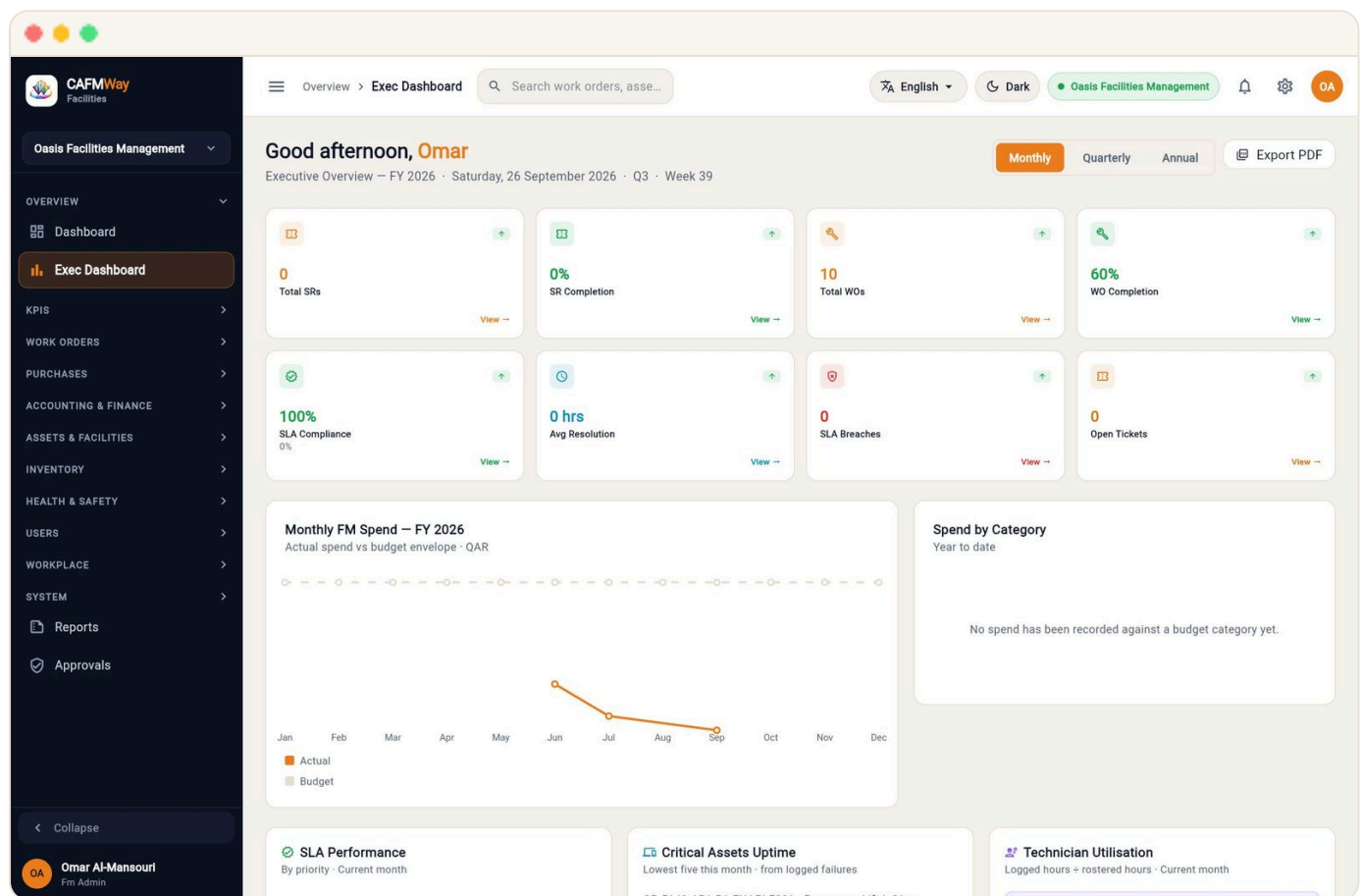


Figure 234 The Executive Dashboard: greeting, eight KPI tiles and the monthly spend chart.

- The eight tiles show **Total SRs**, **SR Completion**, **Total WOs**, **WO Completion**, **SLA Compliance**, **Avg Resolution**, **SLA Breaches** and **Open Tickets**. **View →** on a tile opens the matching list.
- **Monthly FM Spend** compares actual spend with the budget envelope month by month, in QAR. **Spend by Category** splits the year's spend by budget category.
- Lower down, **SLA Performance** (by priority, this month), **Critical Assets Uptime** (the five critical or high-criticality assets with the most logged downtime), **Technician Utilisation** (logged hours against rostered hours) and the **Department Performance Scorecard**.

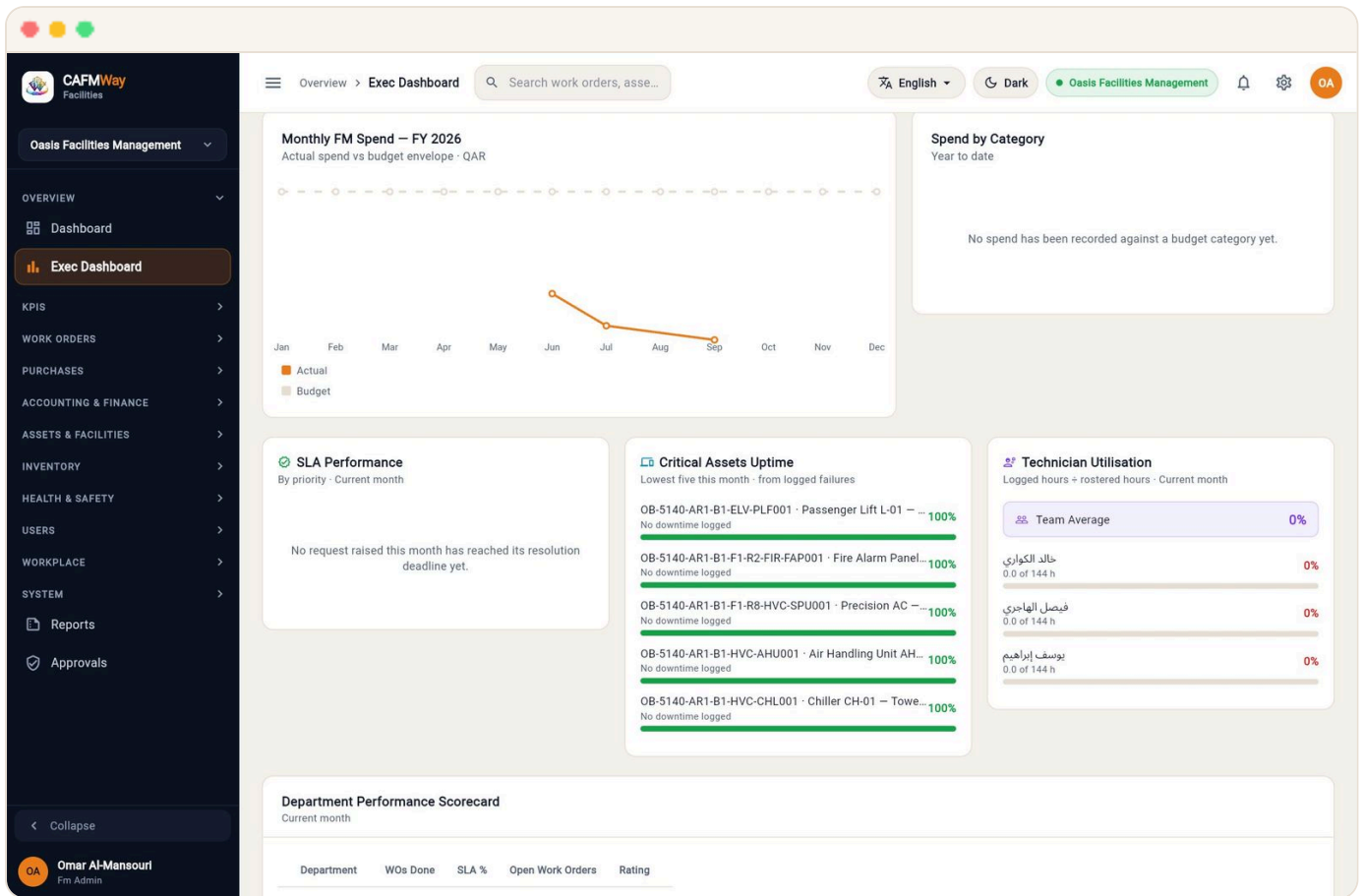


Figure 235 The lower half of the Executive Dashboard with SLA performance, critical asset uptime and technician utilisation.

Export PDF saves the tile figures as a one-page PDF for a management pack.

NOTE

The **Monthly**, **Quarterly** and **Annual** buttons are not connected to the figures yet; the tiles always show the current figures whichever button is selected.

NOTE

Technician Utilisation divides hours logged on work orders by the hours in each technician's roster (see Roster the team). A technician with no roster shows 0 %.

KPI Reports

Who: users with the analytics module
Where: Sidebar → KPIS → **KPI Reports**

KPI Reports shows the headline service figures for a chosen window and, below them, the **Report Catalogue**.

- 1 Pick the window at the top right: **1M**, **3M**, **6M**, **YTD** or **12M**. The cards reload for that window.
- 2 Read the cards: **Total SRs**, **SR Completion**, **Total WOs**, **WO Completion**, **SLA Compliance**, **Avg Resolution**, **SLA Breaches**, **Open Tickets**.
- 3 Scroll to the **Report Catalogue** and click **Open** on a report to run it. The catalogue is the same one the Report Centre uses (see Run and print a report). **Run History** lists reports you ran before.

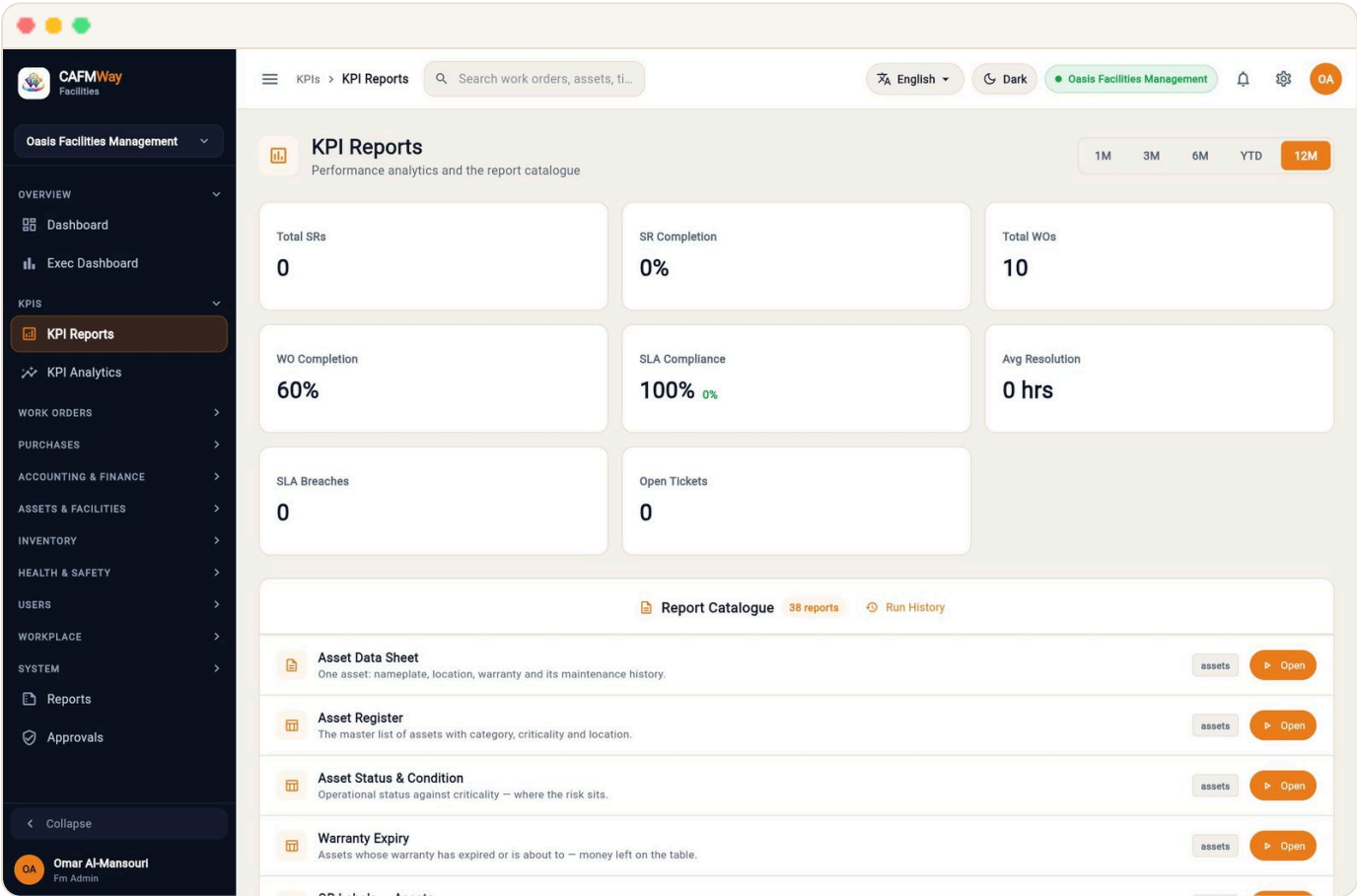


Figure 236 KPI Reports for the last 12 months, with the Report Catalogue below the cards.

KPI Analytics

Who: users with the analytics module and the report permission on dashboards
Where: Sidebar → KPIS → **KPI Analytics**

KPI Analytics adds rankings and trends to the same figures.

- **Technician Performance Rankings** ranks technicians by completion rate, with their work order count and mean time to repair (MTTR).
- **SLA Compliance Trend** plots compliance against the 95 % target over the chosen window.
- **Work Order KPIs by Category** gives, per work category, the active and closed counts, the SLA percentage and MTTR.

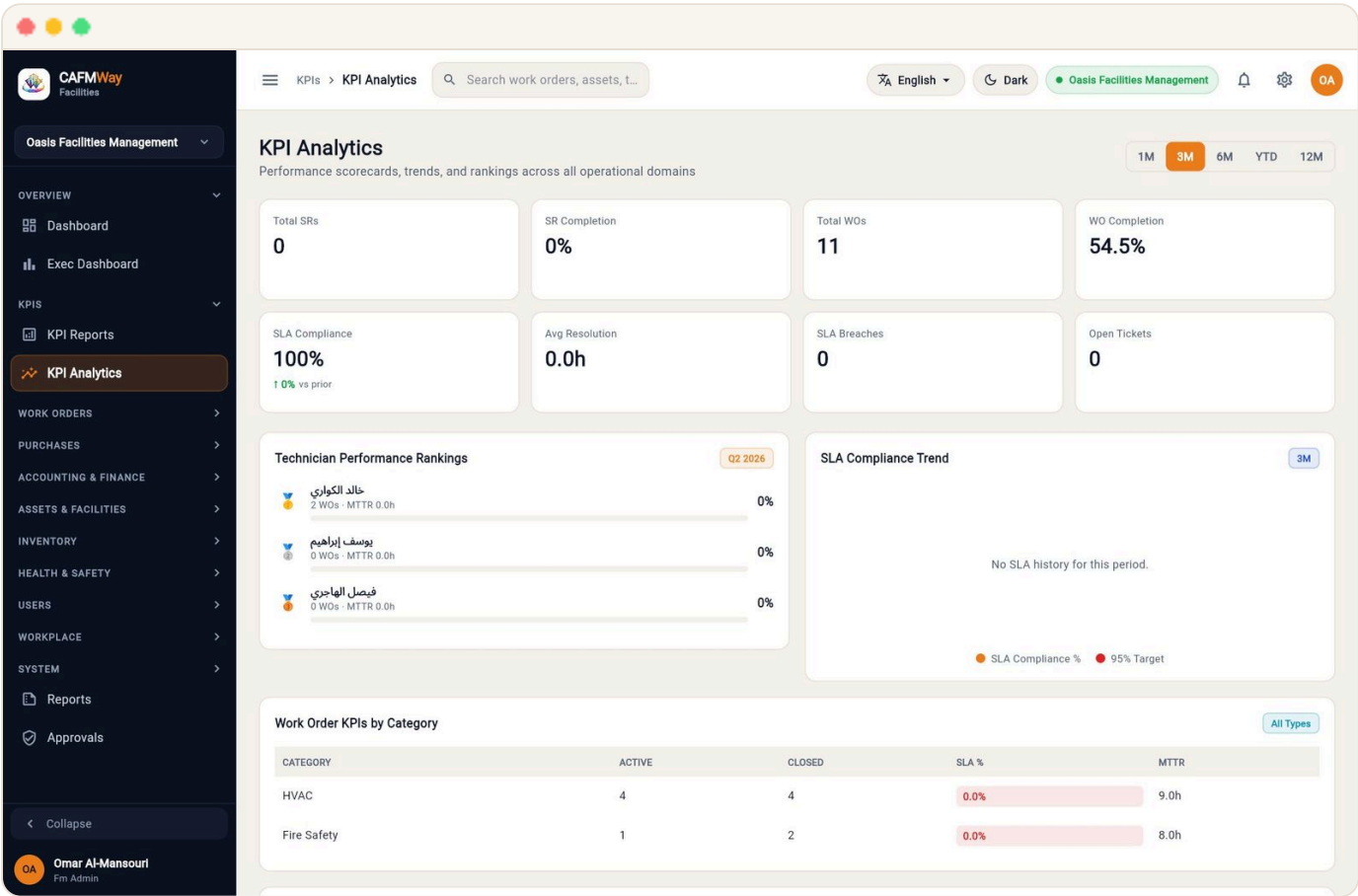


Figure 237 KPI Analytics with the technician ranking, the SLA trend and the category table.

NOTE

The badge on **Technician Performance Rankings** always reads "Q2 2026"; it does not follow the window you select.

Equipment, fleet and asset reliability

These screens sit under ASSETS & FACILITIES next to the asset register. They hold the things that are not building assets (tools and vehicles), long networks such as pipes and cables, and the failure history that drives predictive maintenance. They are used by the FM manager, the asset manager and supervisors.

Register a tool or piece of equipment

Who: users with the resources module (FM Administrator, FM Manager, Supervisor)

Where: Sidebar → ASSETS & FACILITIES → **Equipment**

Equipment is the pool of tools and portable plant your technicians borrow: test instruments, lifts, generators. Each item has a code, a name, a category and a status.

- 1 Open **Equipment**. The **Register** tab lists every item with its status.
- 2 Click **New**. The **New Equipment** form opens.
- 3 Enter a **Code** (for example `EQ-007`) and a **Name** (`Digital Manifold Gauge Set`). Both are required.
- 4 Enter a **Category**, for example `HVAC`, and choose a **Status**: Available, In Use, Maintenance or Retired.
- 5 Click **Create Equipment**. The item appears at the top of the list.

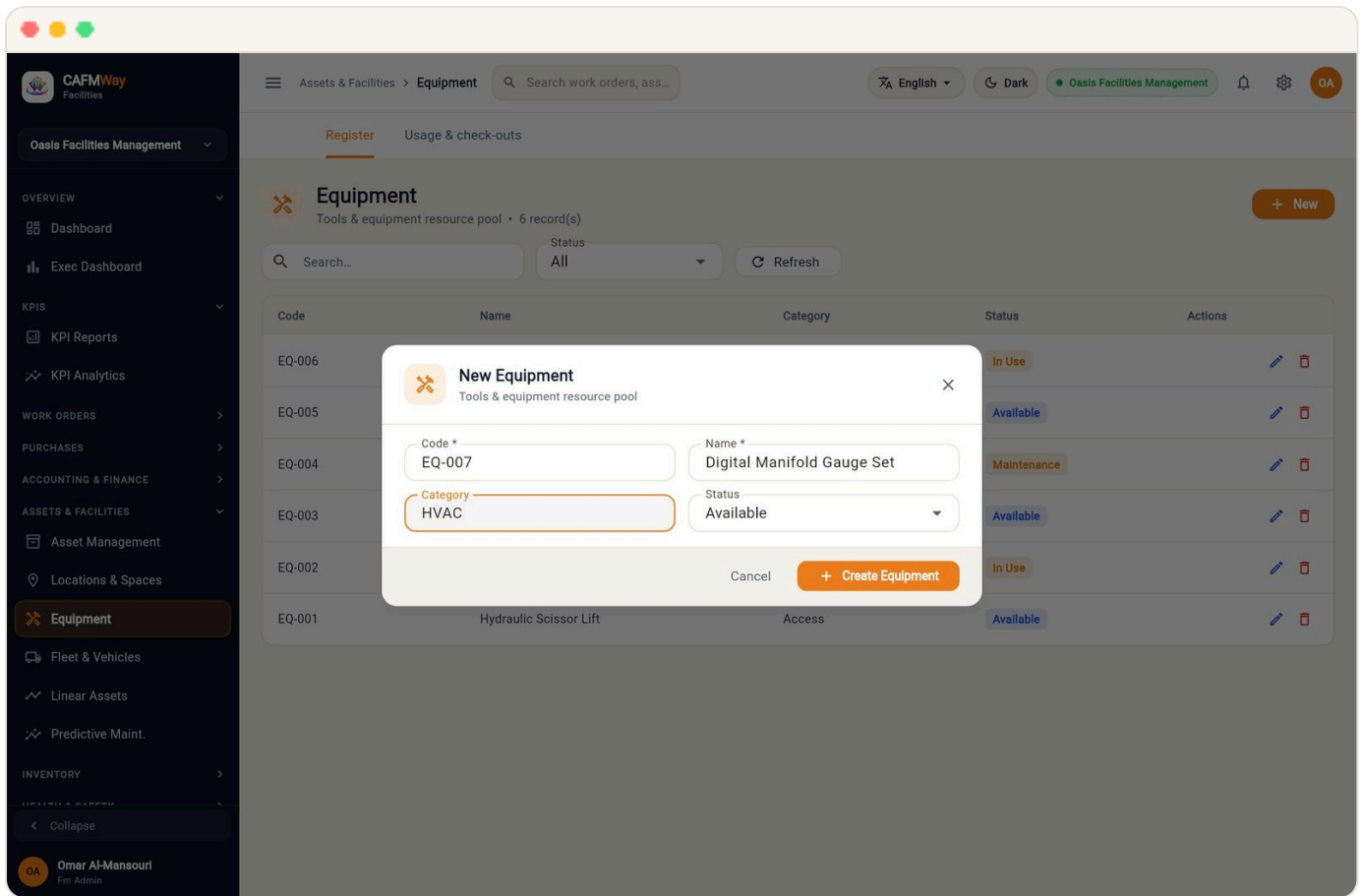


Figure 238 The New Equipment form filled in for a digital manifold gauge set.

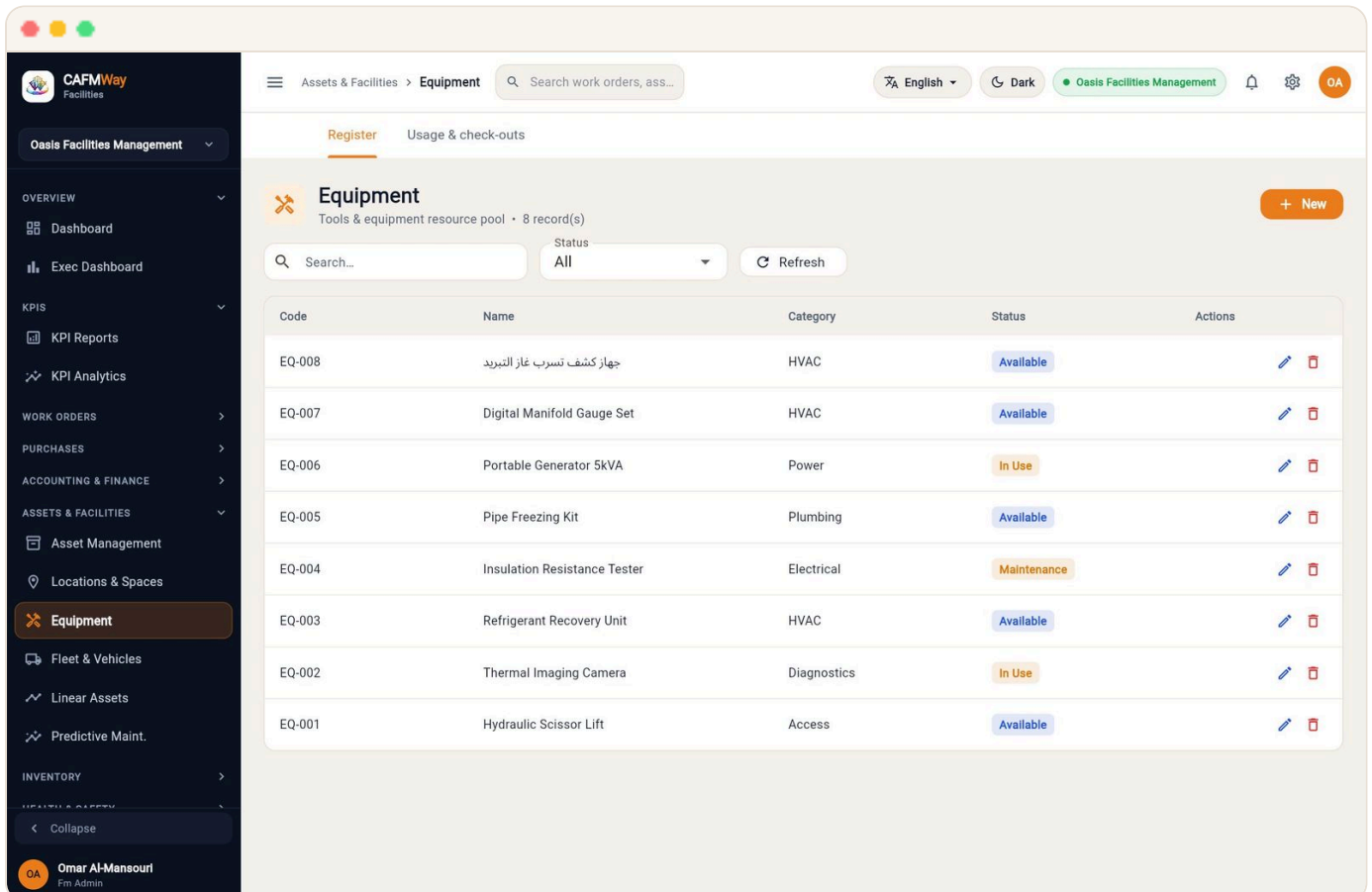


Figure 239 The equipment register with the two new HVAC instruments at the top.

Use the pencil icon on a row to change its status, for example to **Maintenance** when a meter goes for calibration, and the bin icon to delete it.

Usage and check-outs

The **Usage & check-outs** tab shows, for the chosen window (**Last 90 days** by default), how often each item was checked out, the hours it was out, its utilisation and how many days it has been idle. Technicians check tools out and back in from the technician app. When a tool is out, it appears under **Checked out now** with **Mark returned**, which a supervisor can use if the technician forgot to return it in the app.

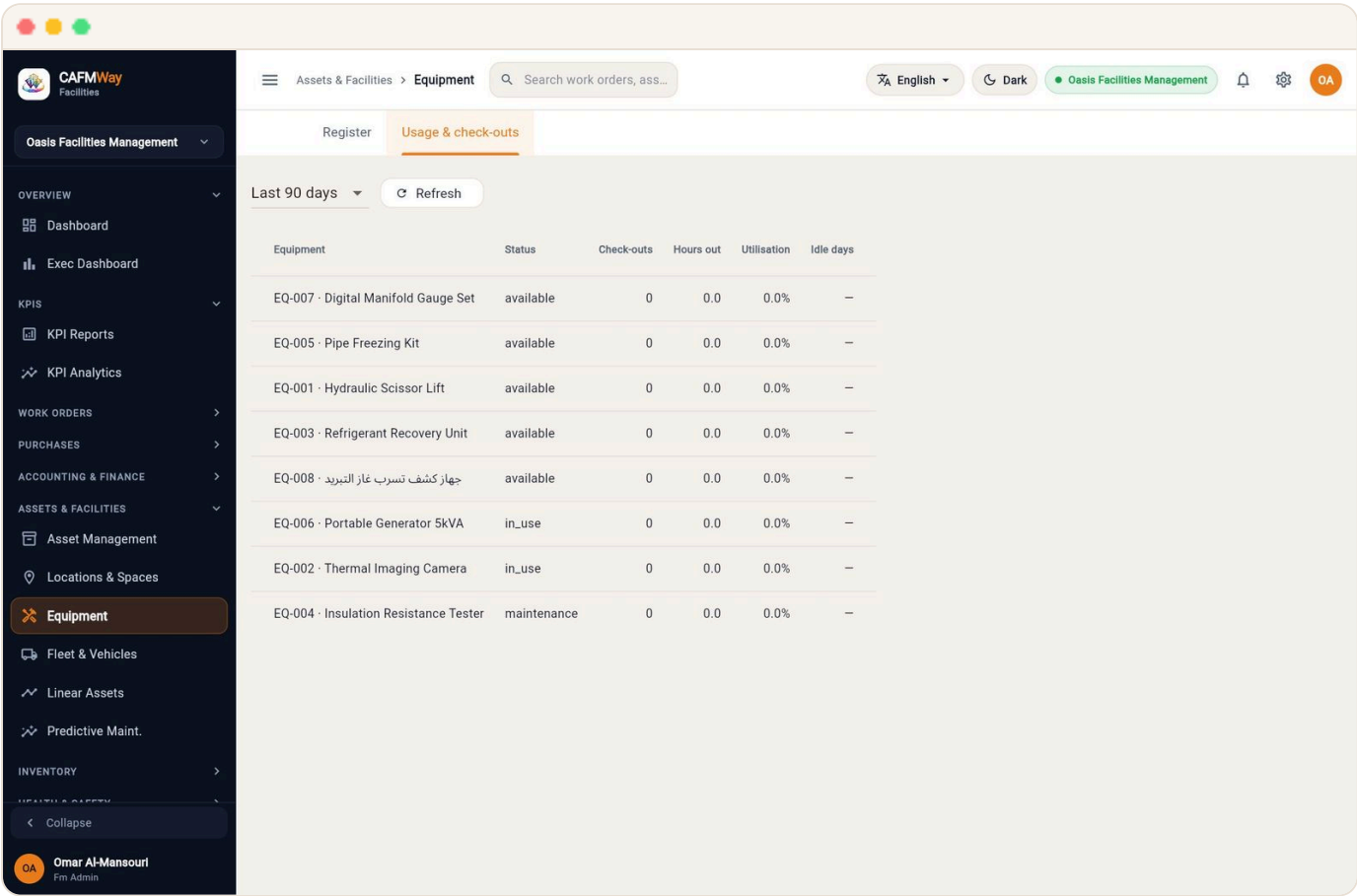


Figure 240 The Usage & check-outs tab listing each item's check-outs, hours out and utilisation.

Register a vehicle and log fuel

Who: users with the resources module

Where: Sidebar → ASSETS & FACILITIES → **Fleet & Vehicles**

The fleet register holds your service vehicles, the driver each one is assigned to and the next service date. Fuel fills logged against a vehicle give its consumption and cost per kilometre.

Register the vehicle

- 1 Open **Fleet & Vehicles** and click **New**.
- 2 Enter the **Plate No** (required), **Make**, **Model** and **Year**.
- 3 Choose a **Status** and enter the **Fuel Type**.
- 4 Click **Assigned driver** and pick the technician who drives the vehicle. Start typing a name to narrow the list. The assigned driver can log fuel for this vehicle from the technician app.
- 5 Enter the current **Odometer** reading and pick the **Next Service** date.
- 6 Click **Create Fleet & Vehicles**.

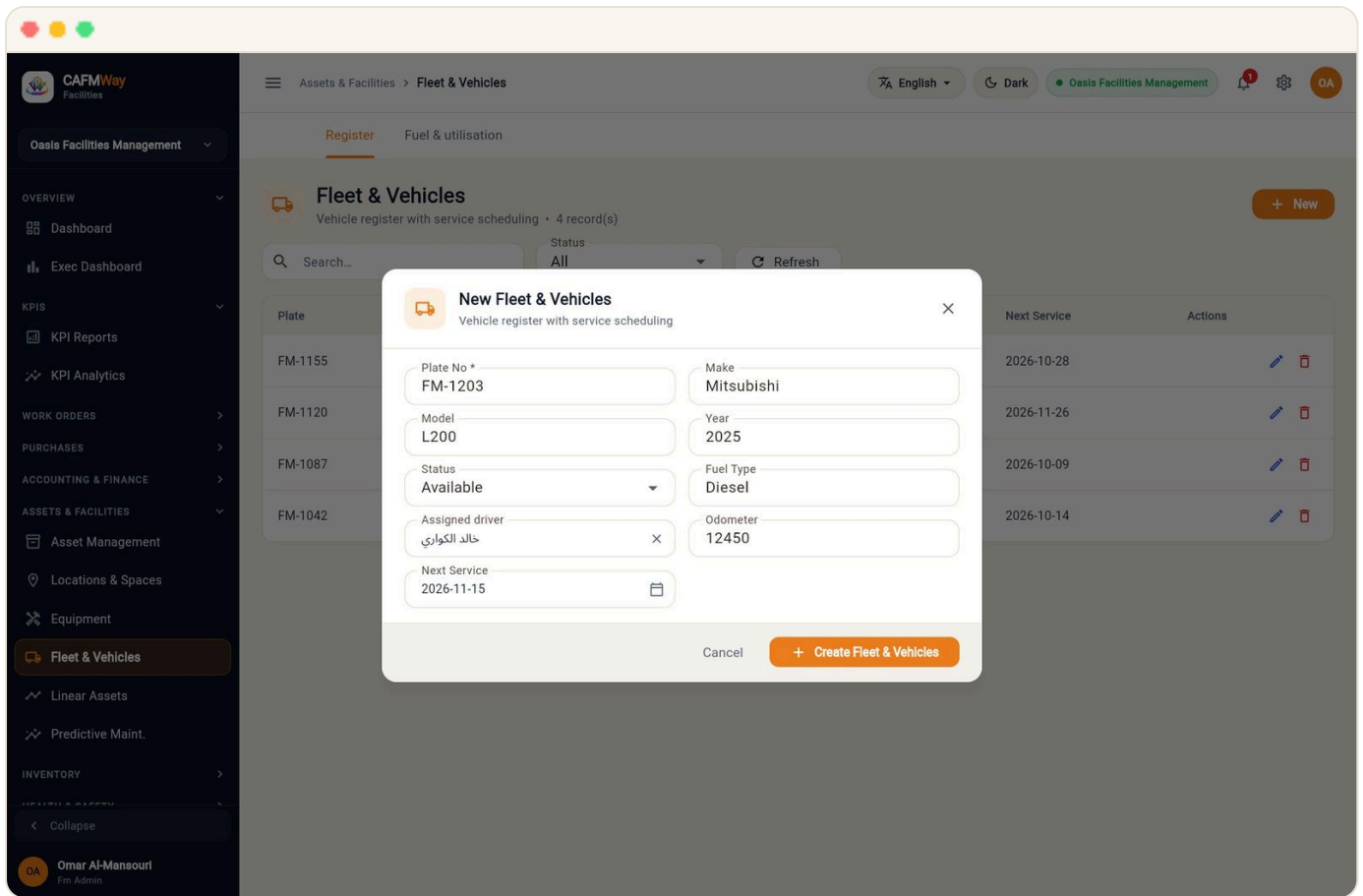


Figure 241 A new pick-up registered to Khalid Al-Kuwari with its odometer reading and next service date.

Log a fuel fill

- 1 Open the **Fuel & utilisation** tab. Each vehicle has a **Log fuel** button.
- 2 Click **Log fuel** on the vehicle's row. The dialog title shows the plate number.
- 3 Enter the **Litres**, the **Cost (QAR)**, the **Odometer (km)** at the pump and the **Station**. Litres are required.
- 4 Click **Save**.

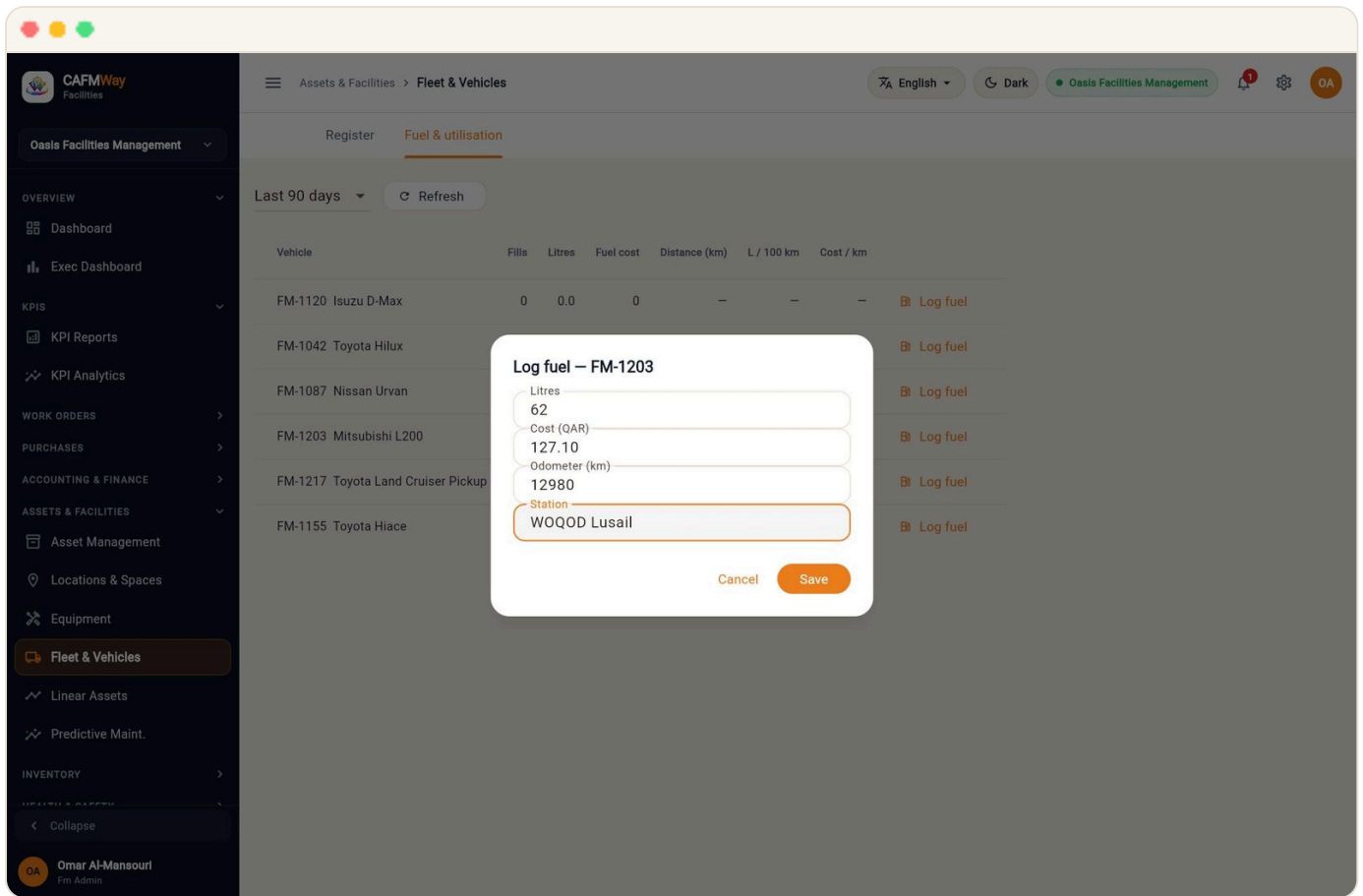


Figure 242 The Log fuel dialog for FM-1203 with litres, cost, odometer and station.

From the second fill onwards the table works out the **Distance (km)** between fills, **L / 100 km** and **Cost / km** for the window you choose.

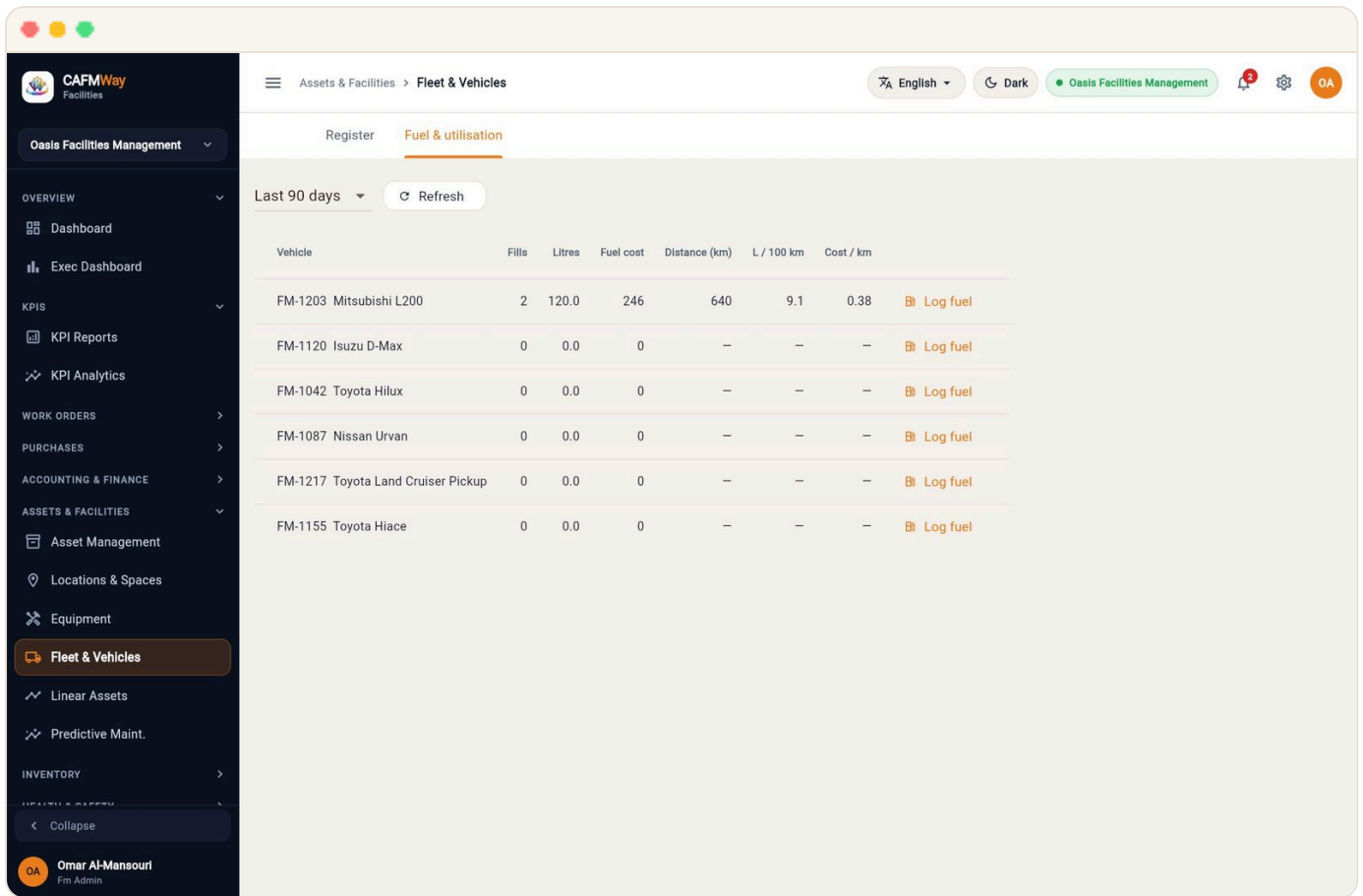


Figure 243 Fuel & utilisation after two fills on FM-1203: 640 km driven at 9.1 L/100 km and QAR 0.38 per km.

EXAMPLE

FM-1203 was filled with 62 L at 12,980 km and 58 L at 13,620 km. Distance = 640 km; consumption = $58 \div 640 \times 100 = 9.1$ L/100 km; cost per km = $(127.10 + 118.90) \div 640 = \text{QAR } 0.38$.

Record a linear asset

Who: users with the assets module

Where: Sidebar → ASSETS & FACILITIES → **Linear Assets**

Linear assets are networks measured by length rather than counted: roads, pipelines, cabling and drainage.

- 1 Open **Linear Assets** and click **New**.
- 2 Enter a **Code** and **Name**, both required, for example `LIN-PP-002` "Domestic water main – North Campus".
- 3 Choose the **Type**: Road, Pipeline, Cable or Drainage.
- 4 Enter the **Total Length (m)**, the **Unit** and a **Status** such as `Operational`.
- 5 Click **Create Linear Assets**.

The screenshot displays the CAFM Way web application interface. On the left is a dark sidebar with navigation options like 'Oasis Facilities Management', 'OVERVIEW', 'KPIs', 'WORK ORDERS', 'PURCHASES', 'ACCOUNTING & FINANCE', 'ASSETS & FACILITIES', 'INVENTORY', and 'HELP & SUPPORT'. The main area shows the 'Linear Assets' section with a '+ New' button. A modal window titled 'New Linear Assets' is open, containing the following fields:

- Code ***: LIN-PP-002
- Name ***: Domestic water main – North Campus
- Type**: Pipeline (selected from a dropdown)
- Total Length (m)**: 1320
- Unit**: m
- Status**: Operational

At the bottom of the modal are 'Cancel' and '+ Create Linear Assets' buttons. In the background, a table lists existing assets:

Code	Name	Type	Length (m)	Status	Actions
LIN-DR-001	Storm water drainage network	Drainage	1540	Operational	[Edit] [Delete]
LIN-CB-001				Operational	[Edit] [Delete]
LIN-PP-001				Operational	[Edit] [Delete]
LIN-RD-001				Operational	[Edit] [Delete]

Figure 244 The New Linear Assets form for the North Campus domestic water main, 1,320 m of pipeline.

The screenshot displays the 'Linear Assets' section of the CAFMWay web application. The left sidebar contains a navigation menu with categories like Overview, KPIs, Work Orders, Purchases, Accounting & Finance, Assets & Facilities, Inventory, and Reports. The 'Linear Assets' option is highlighted. The main content area shows a table of linear assets with columns for Code, Name, Type, Length (m), Status, and Actions. The table lists six records: LIN-CB-002 (Cable), LIN-PP-002 (Pipeline), LIN-DR-001 (Drainage), LIN-CB-001 (Cable), LIN-PP-001 (Pipeline), and LIN-RD-001 (Road). A search bar and a 'Type' filter dropdown are located above the table. The user's name 'Omar Al-Mansouri' is visible in the bottom left corner.

Code	Name	Type	Length (m)	Status	Actions
LIN-CB-002	كابلات الجهد المنخفض - البرج B	Cable	1750	تشغيلي	Edit Delete
LIN-PP-002	Domestic water main – North Campus	Pipeline	1320	Operational	Edit Delete
LIN-DR-001	Storm water drainage network	Drainage	1540	Operational	Edit Delete
LIN-CB-001	LV distribution cabling – Tower A	Cable	2100	Operational	Edit Delete
LIN-PP-001	Chilled water distribution loop	Pipeline	860	Operational	Edit Delete
LIN-RD-001	Main site access road	Road	1250	Operational	Edit Delete

Figure 245 The linear asset register with pipelines, cabling, drainage and the site road.

Use the **Type** filter to list one kind of network, for example all pipelines.

Predictive maintenance: log failures and readings

Who: asset manager, FM manager, supervisors

Where: Sidebar → ASSETS & FACILITIES → **Predictive Maint.**

Predictive maintenance scores each asset's risk of failing from its recorded history: how old it is, how hard it runs, how often it has failed, its latest condition readings and how critical it is. It then recommends an action, a maintenance interval, and an expected cost and downtime. The more failures and readings you record, the better the forecast. The screen has four tabs: **Risk Dashboard**, **Failure Patterns**, **Condition Monitoring** and **Failure Log**.

Record a failure

Record every breakdown, even small ones. The failure mode is what makes pattern analysis possible.

- 1 Open the **Failure Log** tab and click **New**.
- 2 Click **Asset** and pick the asset, for example **Chiller CH-01 — Tower A Roof**.
- 3 Choose the **Failure Mode** (Wear, Electrical, Mechanical, Corrosion, Blockage, Leak, Overheating, Control Fault, Operator Error, Other) and the **Severity** (Minor, Major, Critical).
- 4 Pick the **Failed On** and **Resolved On** dates and enter the **Downtime (hours)**.
- 5 Enter the **Repair Cost**. It feeds the predicted-cost estimate.
- 6 Describe the **Cause**, then click **Create Failure Log**.

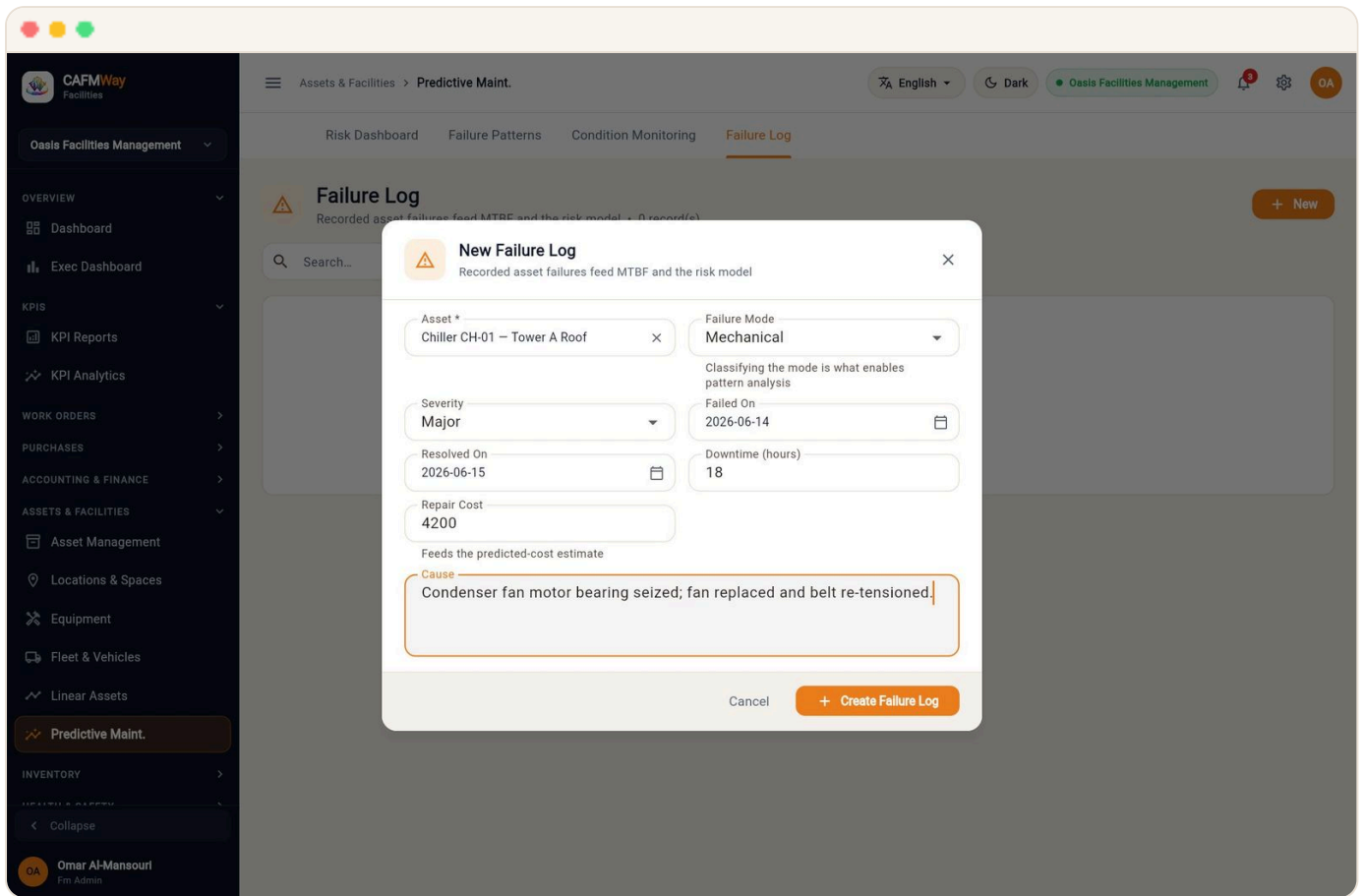


Figure 246 A mechanical failure on Chiller CH-01: condenser fan bearing seized, 18 hours down, QAR 4,200.

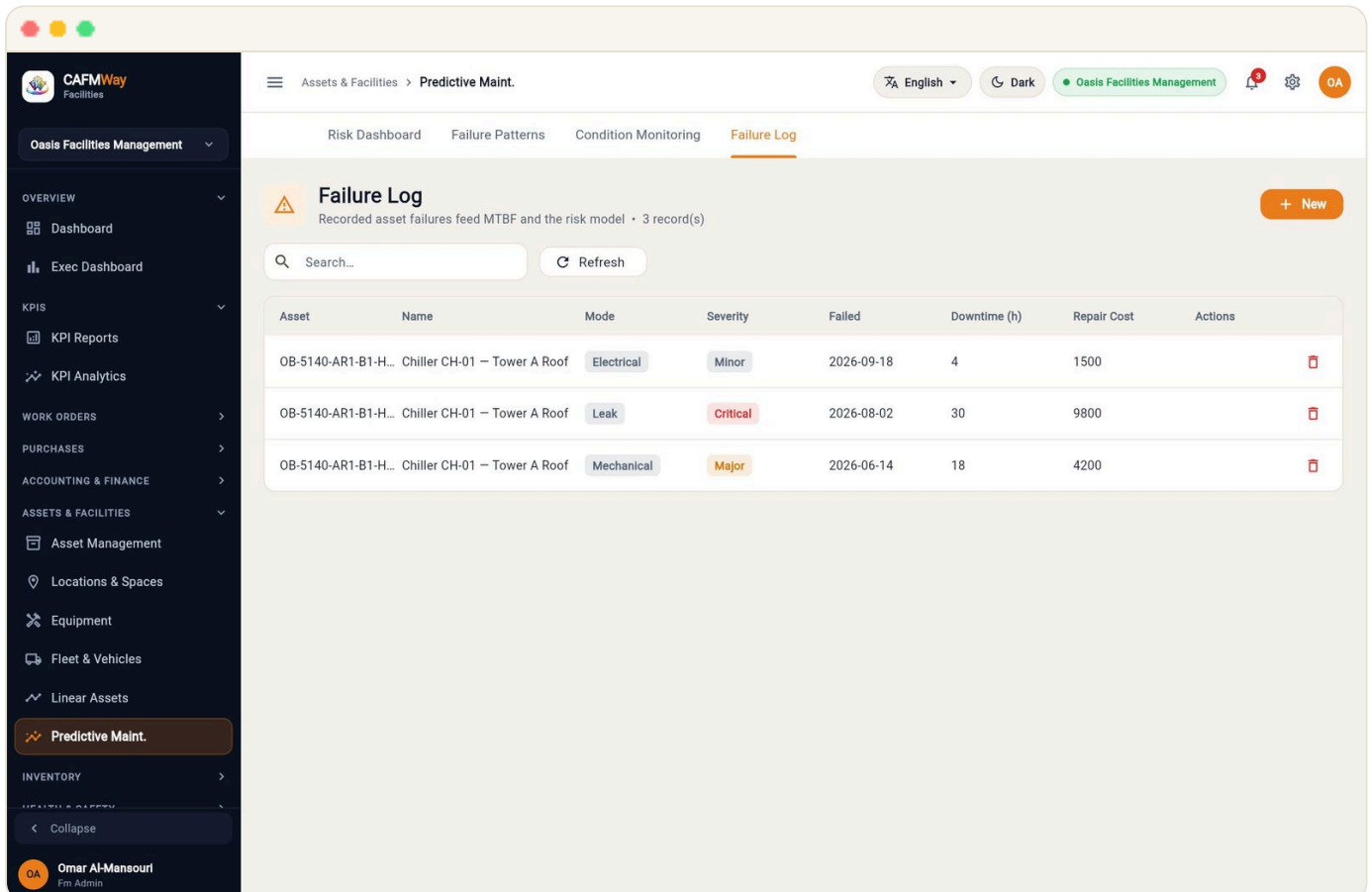


Figure 247 The failure log with three failures recorded on Chiller CH-01 this summer.

BUSINESS RULE

A failure record cannot be edited after it is saved. If you made a mistake, delete it and record it again.

Read the failure patterns

The **Failure Patterns** tab ranks failure modes over the last year by how often they occur, with the downtime and cost each one caused. Use it to see whether one mode (for example leaks) keeps coming back.

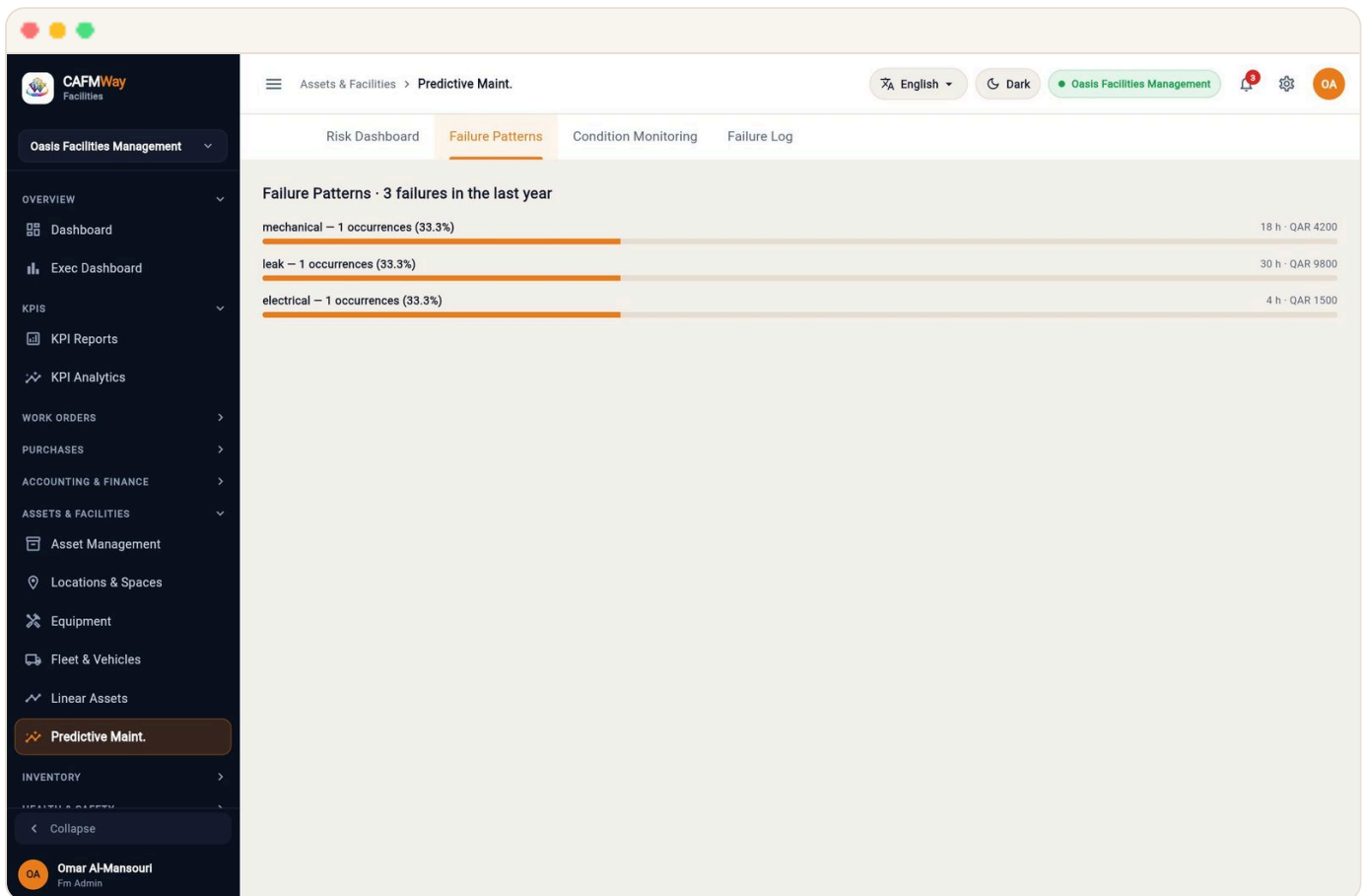


Figure 248 Failure Patterns: mechanical, leak and electrical failures, each one third of the total, with their hours and cost.

Record a condition reading

- 1 Open **Condition Monitoring** and click **New**.
- 2 Pick the **Asset**, type the **Metric** (for example `vibration`, `temperature`, `pressure`), the **Value** and the **Unit**.
- 3 Click **Create Condition Readings**. The reading is listed with its status and source (**manual** here, or an API feed).

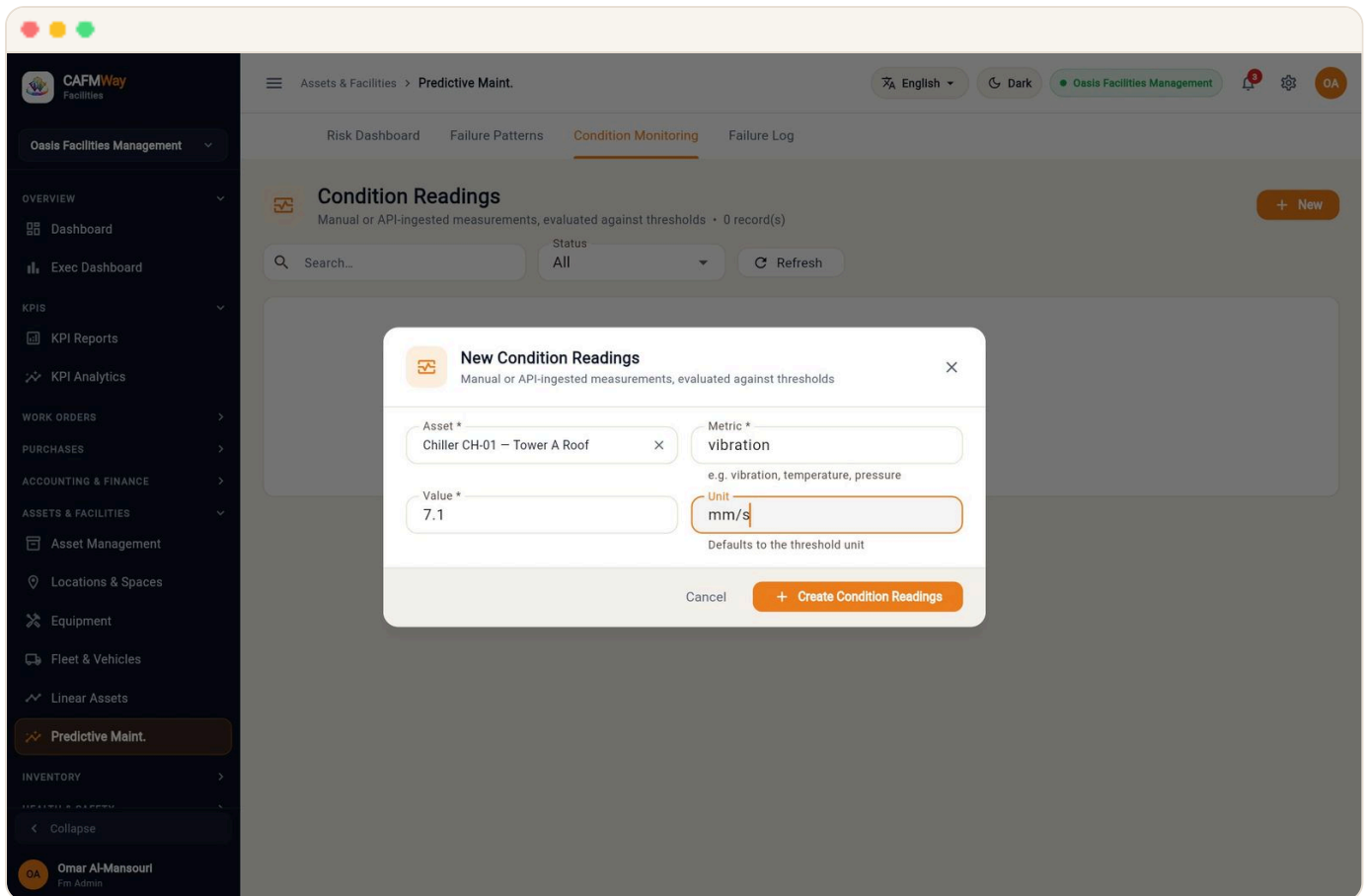


Figure 249 A vibration reading of 7.1 mm/s on Chiller CH-01.

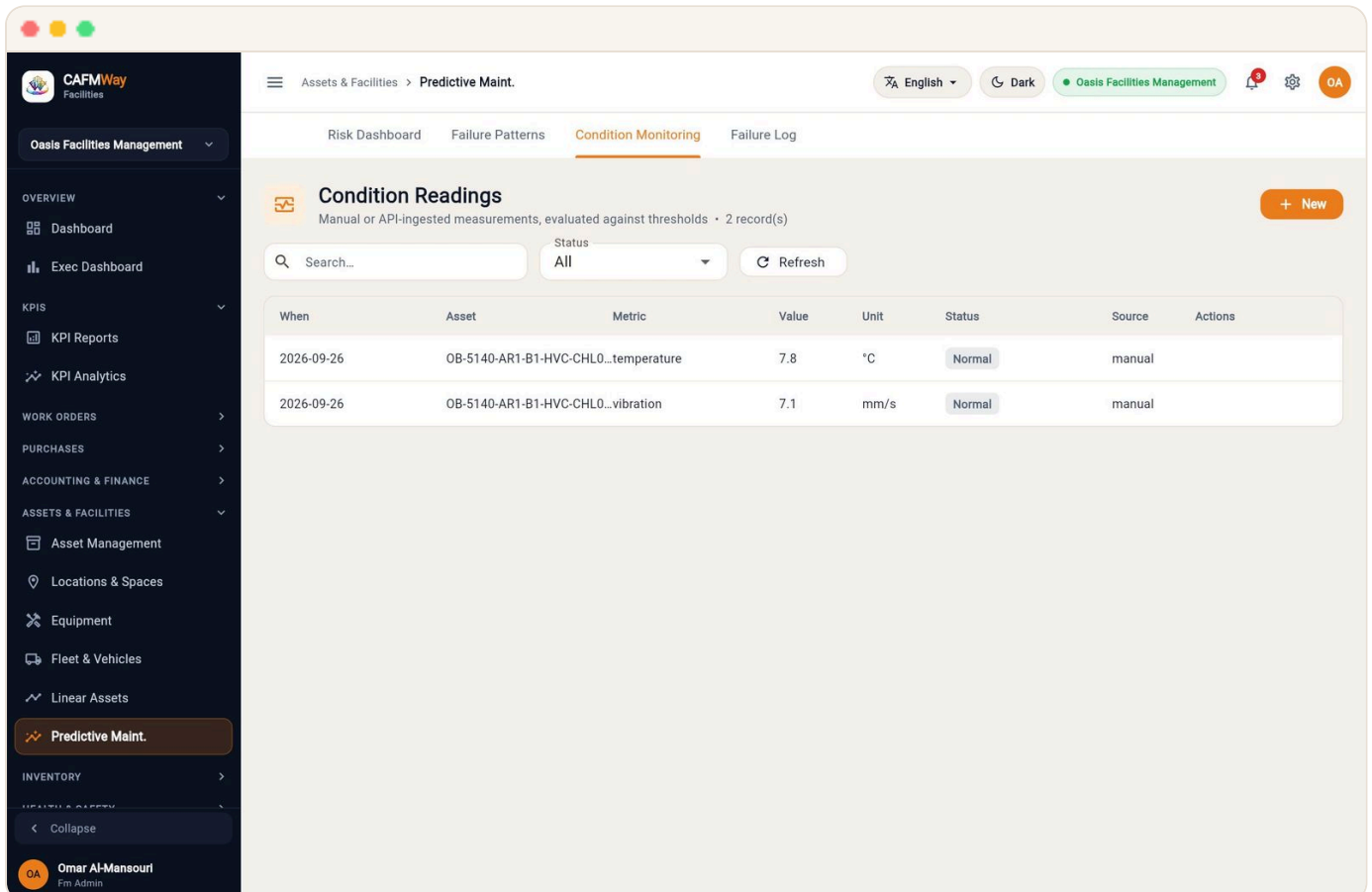


Figure 250 Condition readings for the chiller, each marked Normal.

BUSINESS RULE

A reading is a measurement: it can be recorded, never edited or deleted.

NOTE

A reading is judged against a threshold band for that metric (warning and critical limits). Threshold bands cannot be set from the web app yet, so every reading is currently marked **Normal** and **Condition Alerts** stays at 0.

The risk dashboard

The **Risk Dashboard** shows, for the next 30, 90 or 180 days, the **Assets at Risk**, **Condition Alerts**, **Predicted Cost** and **Predicted Downtime**, then a card per asset at medium or high risk with the recommended action.

The risk score runs from 0 to 100: up to 25 points for age against design life, 15 for operating hours, 30 for failure history (count and time between failures), 20 for the latest condition reading and 10 for criticality. At 40 points an asset becomes medium risk; at 70, high risk.

TIP

An asset with no commissioning or purchase date and no operating hours earns no age or usage points. Fill those in on the asset record, otherwise even a critical asset with several failures stays below the medium line and the dashboard reads **No assets currently at risk**.

NOTE

The model is deterministic and works only on what has been recorded. Machine learning and live IoT feeds are not part of it.

Health and safety

The HEALTH & SAFETY section holds the records an HSE officer keeps: permits to work, risk assessments, checklists, observations, training and PPE, with a dashboard that pulls them together. Incidents are covered in the work orders part of this guide. The worked example in this part follows one job: brazing the chilled water bypass on Chiller CH-01 in the Tower A roof plant room.

Safety dashboard

Who: HSE officer, FM manager
Where: Sidebar → HEALTH & SAFETY → **Safety Dashboard**

The Safety Dashboard is built only from your own records; nothing on it is typed in.

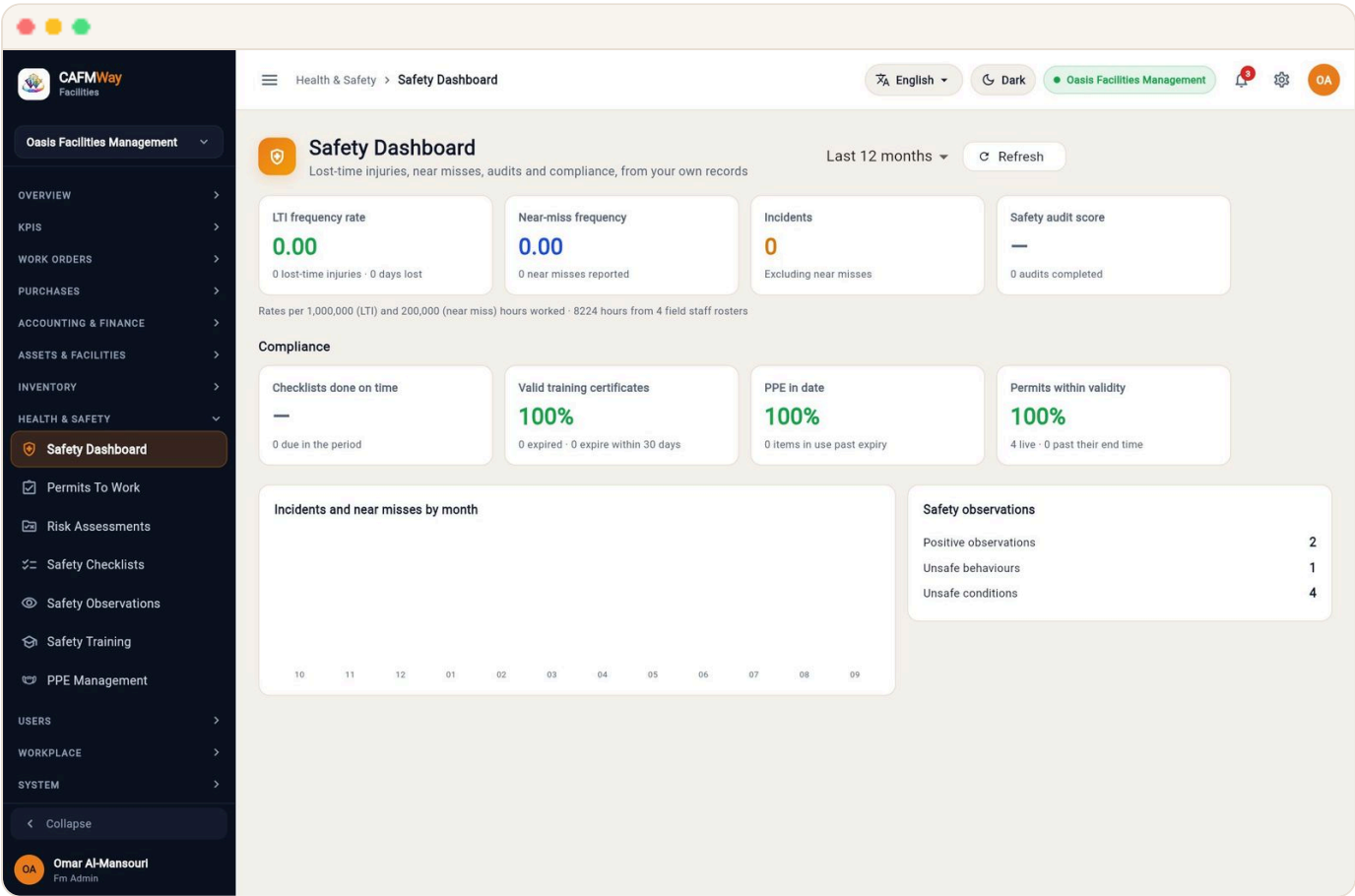


Figure 251 The Safety Dashboard: lost-time and near-miss rates, compliance tiles and the observation count.

Tile	How it is worked out
LTI frequency rate	Lost-time injuries per 1,000,000 hours worked. Hours come from the rosters of field staff.
Near-miss frequency	Near misses per 200,000 hours worked.
Incidents	Incidents in the period, not counting near misses.
Safety audit score	Average score of completed site-audit checklists.
Checklists done on time	Checklists due in the period that were completed by their due date.
Valid training certificates	Share of training certificates not expired; also counts those expiring within 30 days.
PPE in date	Share of issued PPE that has not passed its expiry.
Permits within validity	Share of live permits that have not passed their end date.

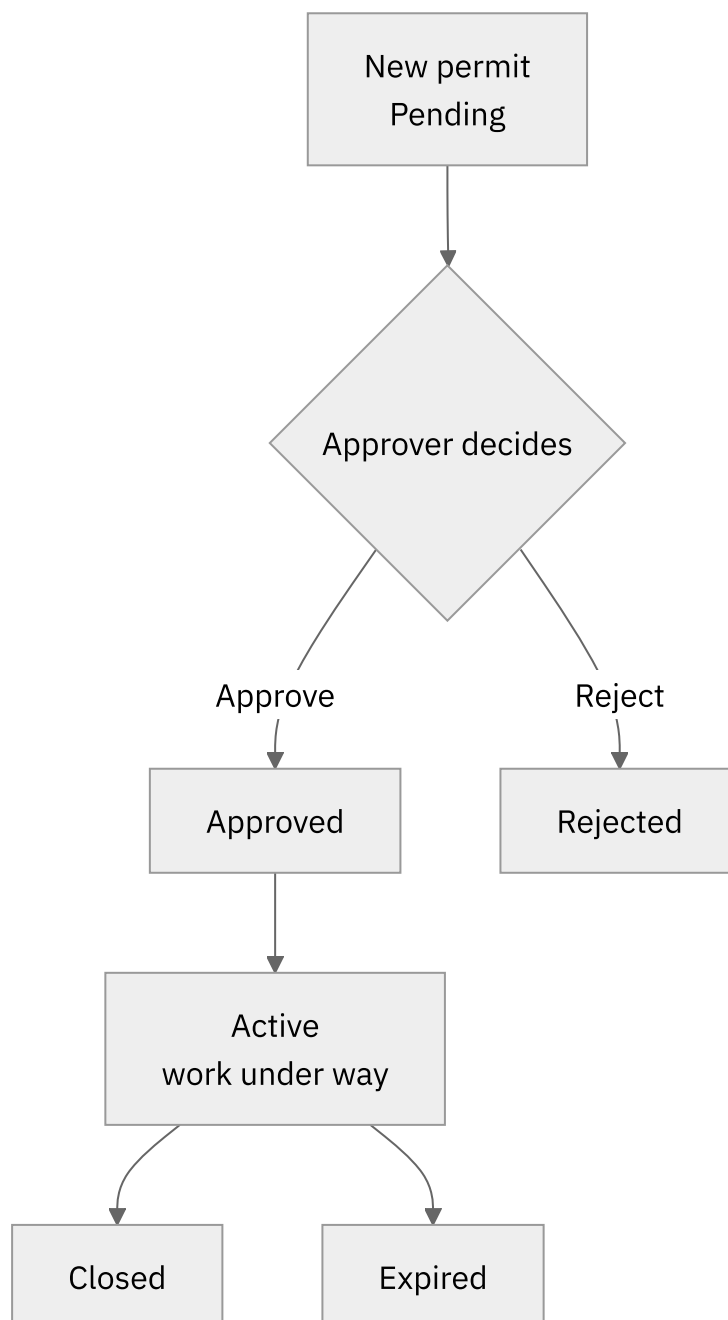
Choose the window (for example **Last 12 months**) at the top and click **Refresh** after you add records in another screen.

Issue a permit to work

Who: requester: any user with create permission on permits; approver: HSE officer or FM manager

Where: Sidebar → HEALTH & SAFETY → **Permits To Work**

A permit to work authorises dangerous work (hot work, confined space entry, work at height, electrical work) for a fixed period. The permit must be approved before the work starts and must be on site while the work is done.



Request the permit

- 1 Open **Permits To Work** and click **New**.
- 2 Enter a **Title** that names the work and the place, for example
Hot work – CH-01 plant room brazing.
- 3 Choose the **Type**: Hot Work, Confined Space, Height or Electrical.
- 4 Pick **Valid From** and **Valid To**.
- 5 In **Description**, write the scope of work and the precautions: fire watch, extinguishers, isolation, gas test.
- 6 Click **Create Permits To Work**. The permit gets the next number, for example
PTW-2026-0006, and the status **Pending**.

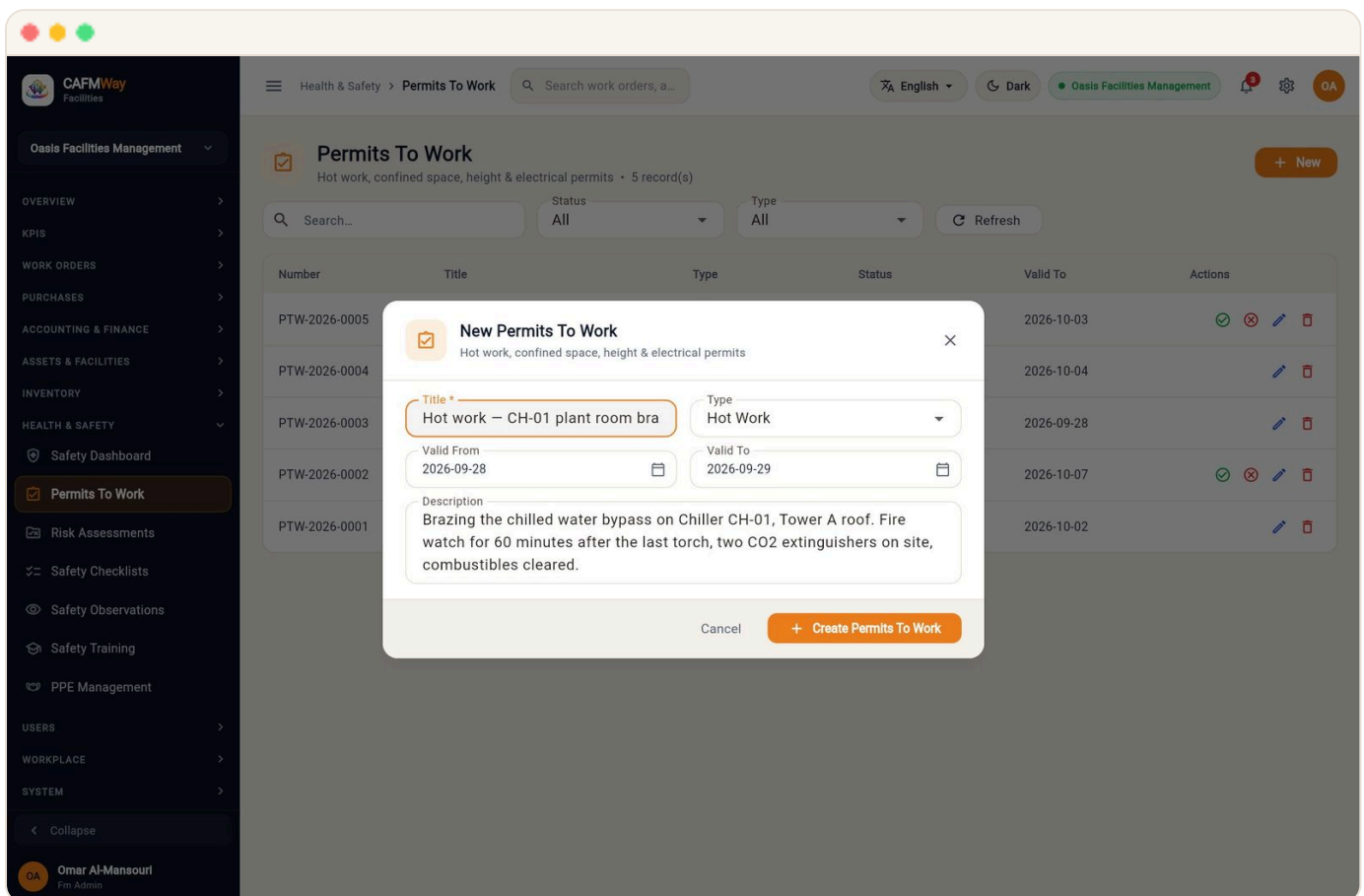


Figure 252 A hot-work permit request for brazing on Chiller CH-01, valid 28 to 29 September.

Approve the permit

- 1 In the list, find the permit with status **Pending**. Pending permits show two extra icons: a green tick (**Approve**) and a red cross (**Reject**).
- 2 Click **Approve**. The status changes to **Approved** at once, and the icons disappear. Click **Reject** instead to refuse the permit.

Permits To Work
Hot work, confined space, height & electrical permits • 6 record(s)

Search... Status: All Type: All Refresh

Number	Title	Type	Status	Valid To	Actions
PTW-2026-0006	Hot work – CH-01 plant room brazing	Hot Work	Pending	2026-09-29	Approve, Cancel, Edit, Delete
PTW-2026-0005	Cutting works – Car park deck	Hot Work	Pending	2026-10-03	Approve, Cancel, Edit, Delete
PTW-2026-0004	LV panel isolation – Tower B	Electrical	Closed	2026-10-04	Edit, Delete
PTW-2026-0003	Facade access – Level 8 window clean	Height	Active	2026-09-28	Edit, Delete
PTW-2026-0002	Tank entry – Basement water tank	Confined Space	Pending	2026-10-07	Approve, Cancel, Edit, Delete
PTW-2026-0001	Welding works – Roof plant room	Hot Work	Approved	2026-10-02	Edit, Delete

Figure 253 The permit list with PTW-2026-0006 pending approval.

Permits To Work
Hot work, confined space, height & electrical permits • 6 record(s)

Search... Status: All Type: All Refresh

Number	Title	Type	Status	Valid To	Actions
PTW-2026-0006	Hot work – CH-01 plant room brazing	Hot Work	Approved	2026-09-29	Edit, Delete
PTW-2026-0005	Cutting works – Car park deck	Hot Work	Pending	2026-10-03	Approve, Cancel, Edit, Delete
PTW-2026-0004	LV panel isolation – Tower B	Electrical	Closed	2026-10-04	Edit, Delete
PTW-2026-0003	Facade access – Level 8 window clean	Height	Active	2026-09-28	Edit, Delete
PTW-2026-0002	Tank entry – Basement water tank	Confined Space	Pending	2026-10-07	Approve, Cancel, Edit, Delete
PTW-2026-0001	Welding works – Roof plant room	Hot Work	Approved	2026-10-02	Edit, Delete

Figure 254 PTW-2026-0006 approved.

Start and close the work

- 1 When work starts on site, click the pencil icon on the permit.
- 2 Change **Status** to **Active** and click **Save Changes**.
- 3 When the work is finished and the area is safe, open the permit again and set **Status** to **Closed**. A permit that ran past its end date without being closed can be set to **Expired**.

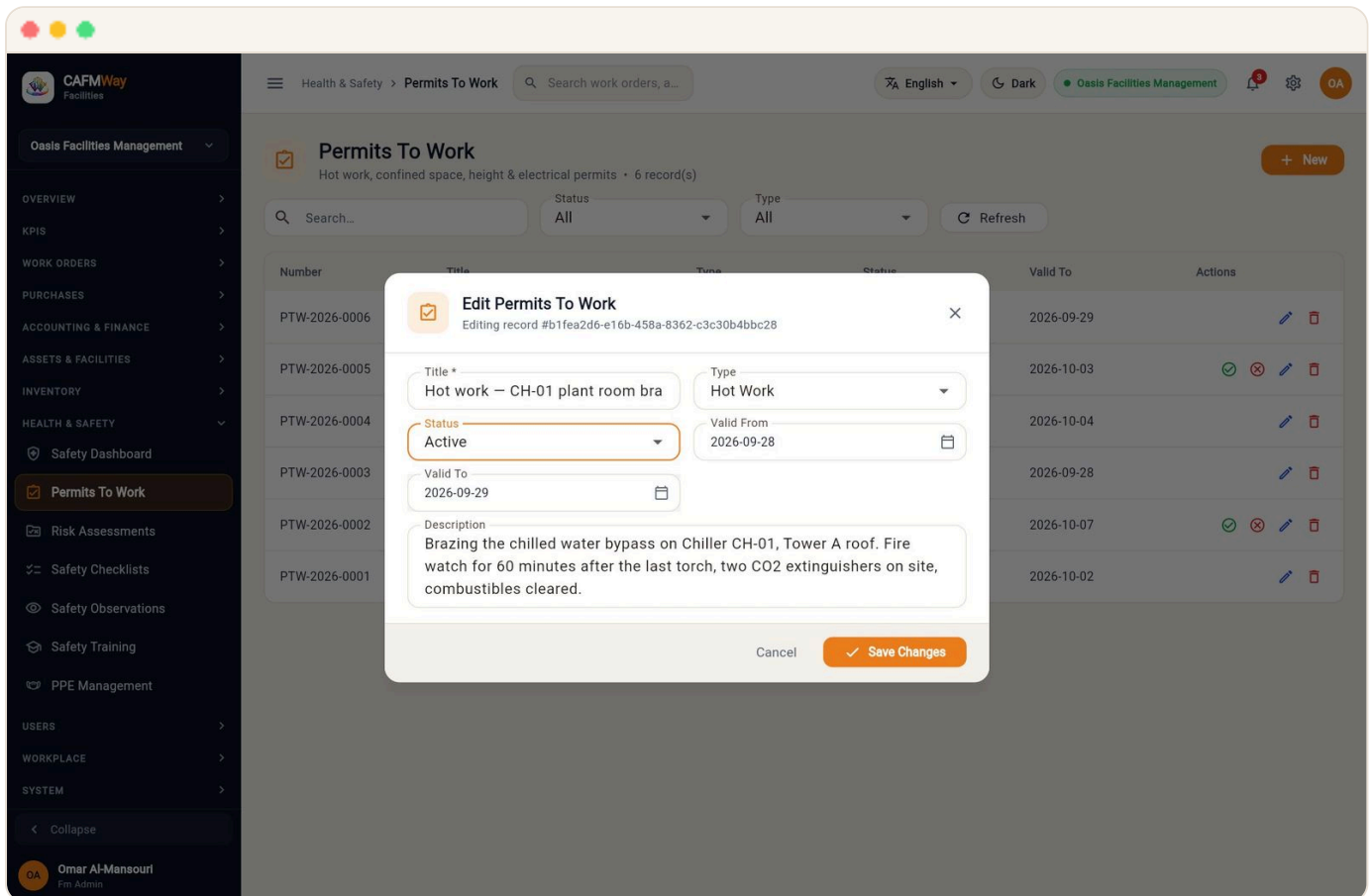


Figure 255 The permit opened for editing with the status set to Active.

BUSINESS RULE

Approve and Reject appear only while a permit is **Pending**. They take effect immediately, without a confirmation or comment, and record the approver.

TIP

To print the permit for the work site, use the **Permit to Work** report in the Report Centre (see Run and print a report).

NOTE

The permit form has no field for the location or the related work order. Name both in the title or description.

Assess a risk

Who: HSE officer, supervisor
Where: Sidebar → HEALTH & SAFETY → Risk Assessments

A risk assessment scores an activity by likelihood and severity, lists the controls, and records the risk that remains after them.

- 1 Open **Risk Assessments** and click **New**.
- 2 Enter a **Title** and describe the **Activity**.
- 3 Enter **Likelihood (1-5)** and **Severity (1-5)**.
- 4 List the **Controls** you will put in place.
- 5 Enter the **Residual Risk (1-25)** you expect once the controls are in place, and choose the **Status** (Open, Reviewed, Closed).
- 6 Click **Create Risk Assessments**. The assessment gets a number such as RA-2026-0006 .

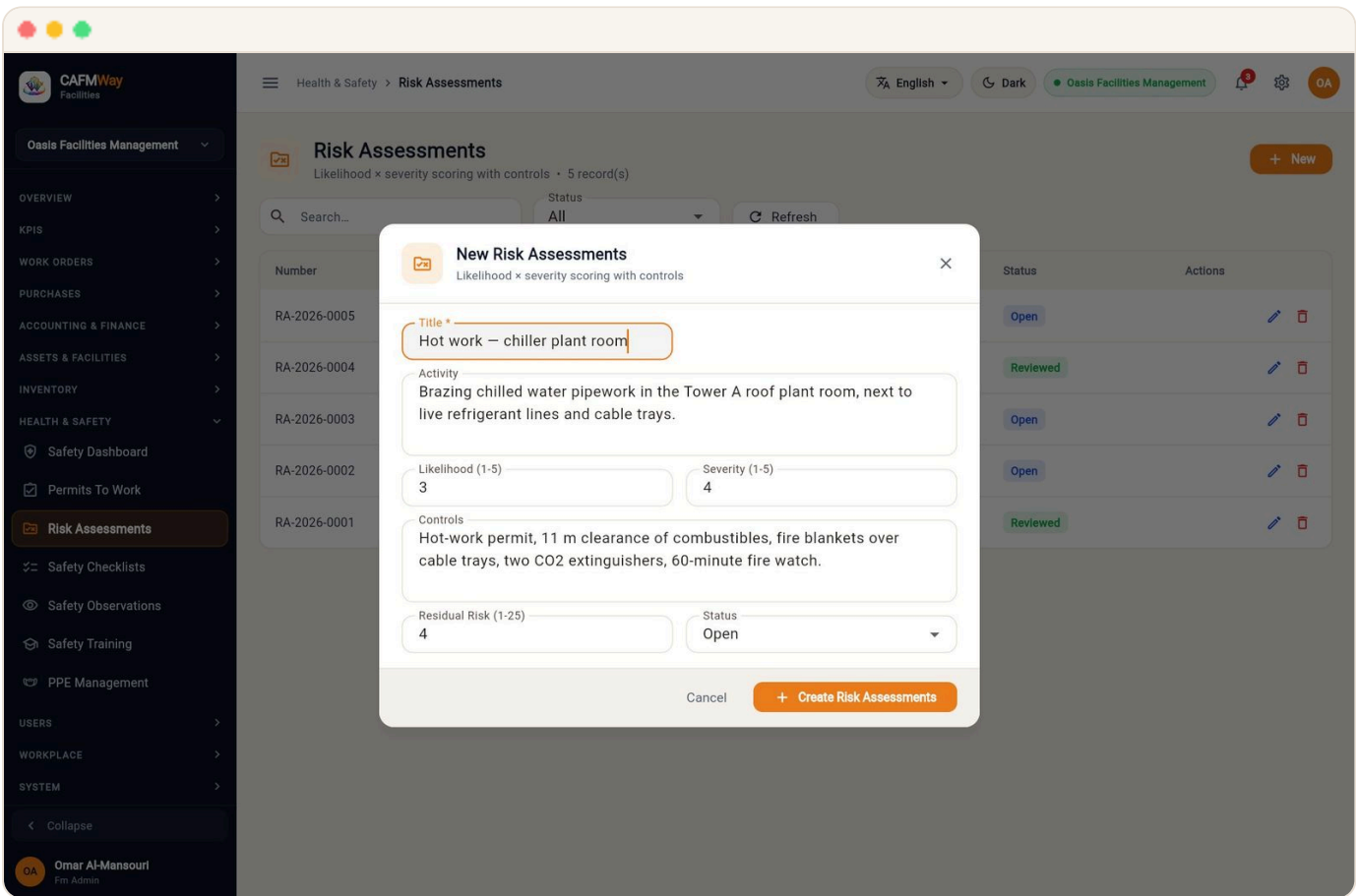
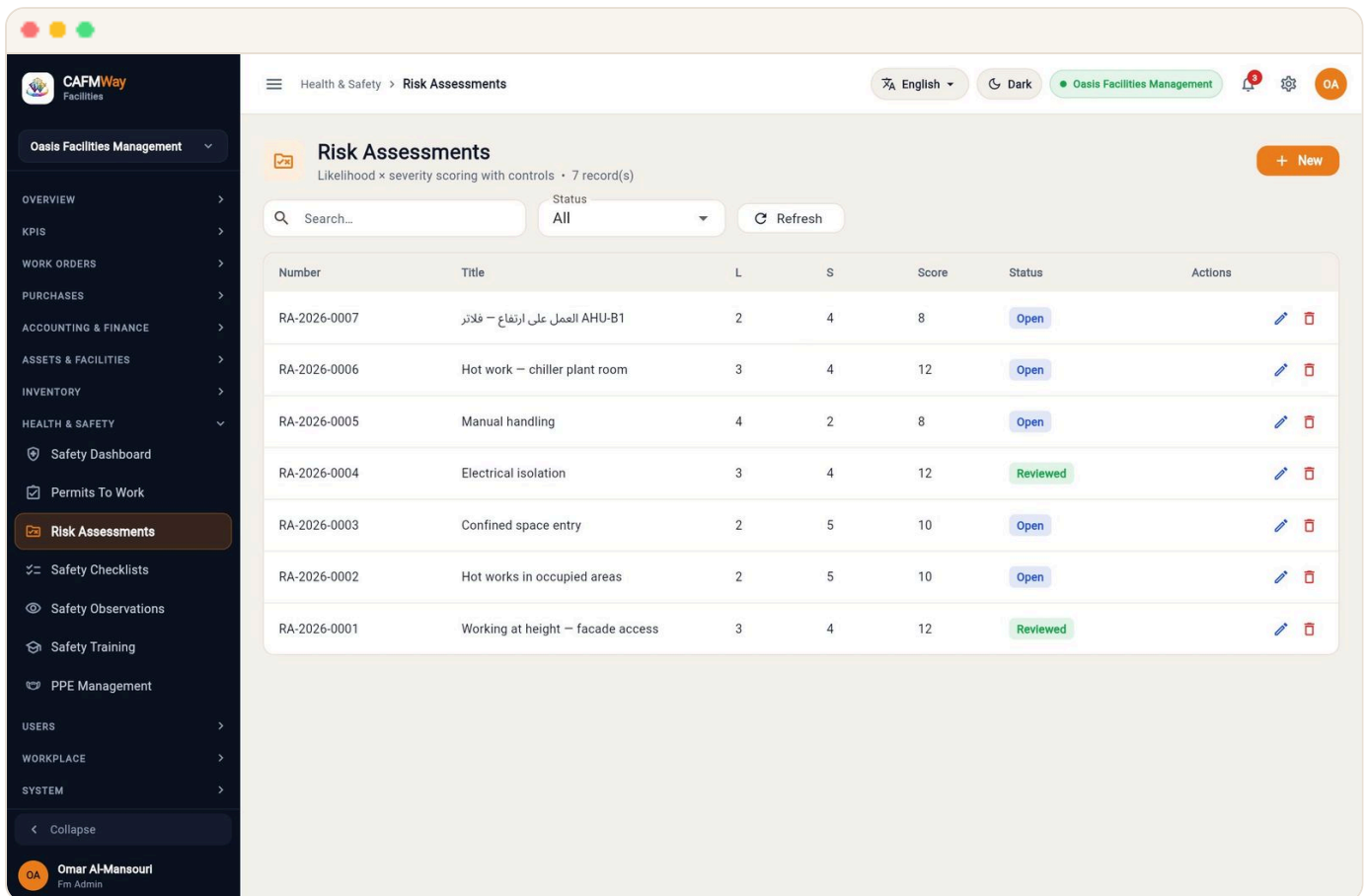


Figure 256 A risk assessment for hot work in the chiller plant room: likelihood 3, severity 4, with the controls listed.

The list shows **L** (likelihood), **S** (severity) and the **Score**, which the system works out as $L \times S$.



The screenshot shows the CAFMWay Risk Assessments interface. The left sidebar contains a navigation menu with categories like OVERVIEW, KPIS, WORK ORDERS, PURCHASES, ACCOUNTING & FINANCE, ASSETS & FACILITIES, INVENTORY, and HEALTH & SAFETY. The 'Risk Assessments' option is highlighted. The main content area displays a table of risk assessments with the following data:

Number	Title	L	S	Score	Status	Actions
RA-2026-0007	العمل على ارتفاع - فلاتر AHU-B1	2	4	8	Open	Edit Delete
RA-2026-0006	Hot work – chiller plant room	3	4	12	Open	Edit Delete
RA-2026-0005	Manual handling	4	2	8	Open	Edit Delete
RA-2026-0004	Electrical isolation	3	4	12	Reviewed	Edit Delete
RA-2026-0003	Confined space entry	2	5	10	Open	Edit Delete
RA-2026-0002	Hot works in occupied areas	2	5	10	Open	Edit Delete
RA-2026-0001	Working at height – facade access	3	4	12	Reviewed	Edit Delete

Figure 257 The risk assessment register with each activity's L, S and score.

EXAMPLE

Hot work in the plant room: likelihood 3 × severity 4 = score 12 before controls. With the permit, fire blankets, extinguishers and a fire watch, the residual risk is recorded as 4.

Record a safety checklist

Who: supervisors, HSE officer

Where: Sidebar → HEALTH & SAFETY → **Safety Checklists**

A safety checklist records the result of a pre-task check, an equipment inspection or a site audit: how many items were checked, how many passed and failed, the score, the findings and the corrective actions.

- 1 Open **Safety Checklists** and click **New**.
- 2 Under **CHECKLIST**, enter the **Title**, choose the **Type** (Pre Task, Equipment Inspection, Site Audit) and enter the **Inspector**.
- 3 Click **Location** and pick the place from Locations & Spaces, for example Tower A.
- 4 Under **RESULTS**, choose the **Status** (Draft, In Progress, Completed, Failed) and the **Due Date**.
- 5 Enter **Total Items**, **Passed Items**, **Failed Items** and the **Score (0-100)**.
- 6 Describe the **Findings** and the **Corrective Actions**, then click **Create Safety Checklists**.

New Safety Checklists
Pre-task, equipment inspection & site audit checklists with pass/fail scoring

CHECKLIST

Title *
Pre-task check – CH-01 hot work

Type
Pre Task

Inspector
Mariam Al-Sulaiti

Location
Oasis Business Park › North Campus › Tower A

Where the checklist applies (Locations & Spaces)

RESULTS

Status
Completed

Due Date
2026-09-28

Total Items
12

Passed Items
11

Failed Items
1

Score (0-100)
92

Findings
One of the two CO2 extinguishers was 2 weeks past its inspection date.

Corrective Actions
Extinguisher swapped with an in-date unit from the Tower A store before

Cancel **+ Create Safety Checklists**

Figure 258 A completed pre-task check for the CH-01 hot work: 12 items, 11 passed, score 92.

Safety Checklists
Pre-task, equipment inspection & site audit checklists with pass/fail scoring • 2 record(s)

Search... Status: All Type: All Refresh

Number	Title	Type	Inspector	Score	Due	Status	Actions
SCL-2026-0002	فحص معدات – المصعد L-01	Equipment Inspection	يوسف إبراهيم	85	2026-09-30	In Progress	Edit Delete
SCL-2026-0001	Pre-task check – CH-01 hot work	Pre Task	Mariam Al-Sulaiti	92	2026-09-28	Completed	Edit Delete

Figure 259 The checklist register with the pre-task check and a lift inspection still in progress.

NOTE

The checklist stores the totals and findings only; it does not hold the individual check items.

Record a safety observation

Who: anyone with access to the H&S section
Where: Sidebar → HEALTH & SAFETY → **Safety Observations**

Observations capture what people see on site: unsafe conditions, unsafe behaviour, and good practice worth recognising.

- 1 Open **Safety Observations** and click **New**.
- 2 Choose the **Type**: Unsafe Condition, Unsafe Behavior or Positive.
- 3 Write a **Description** (required) that says what was seen and where.
- 4 Leave **Status** as **Open**, then click **Create Safety Observations**.
- 5 When the hazard has been dealt with, edit the observation and set **Status** to **Actioned**, then **Closed** once it is checked.

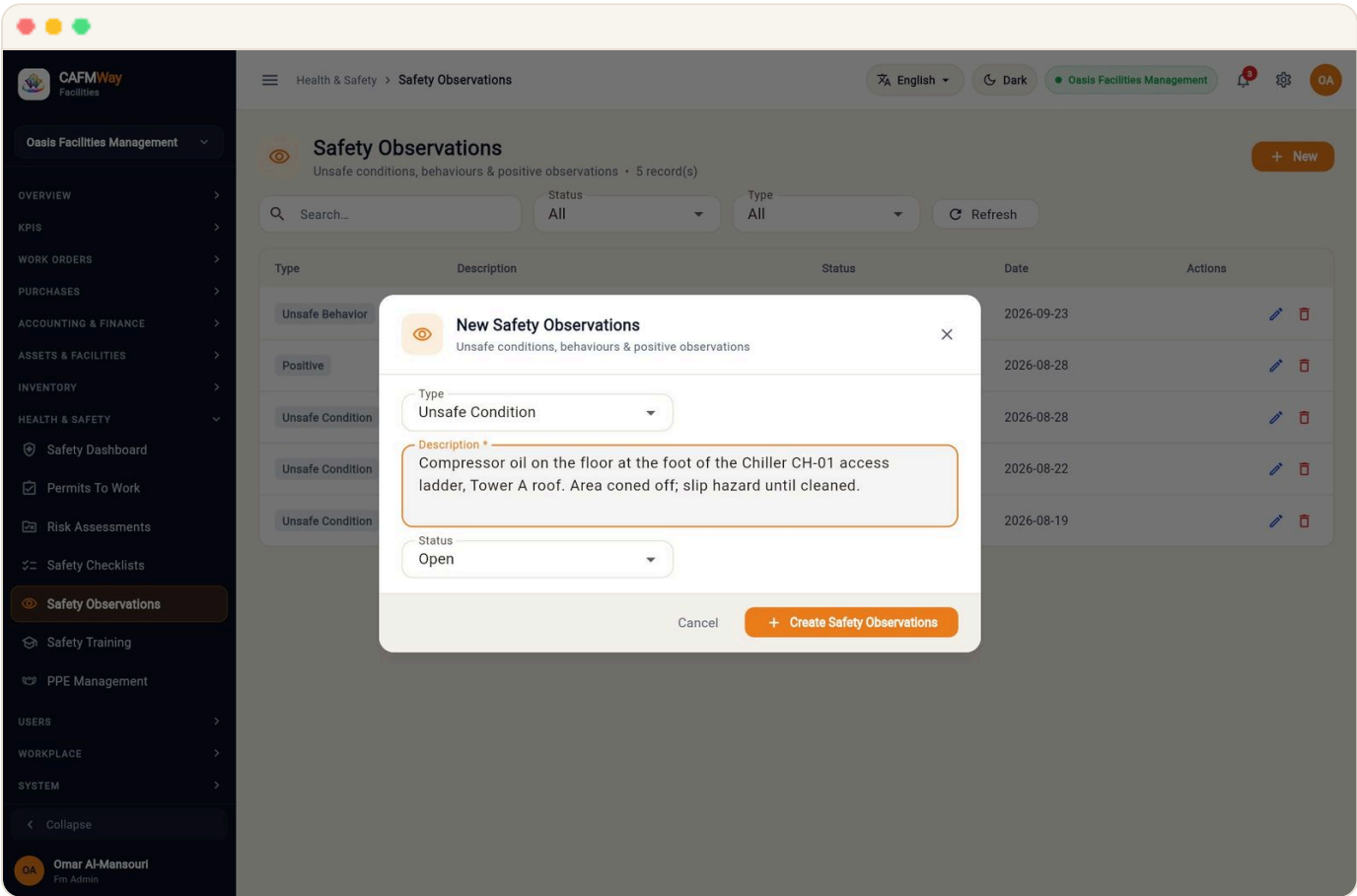


Figure 260 An unsafe-condition observation: compressor oil at the foot of the CH-01 access ladder.

The screenshot displays the 'Safety Observations' page in the CAFMWay web application. The left sidebar contains a navigation menu with categories like Overview, KPIs, Work Orders, Purchases, Accounting & Finance, Assets & Facilities, Inventory, Health & Safety, Users, Workplace, and System. The 'Health & Safety' section is expanded, showing 'Safety Observations' as the active item. The main content area has a header with 'Health & Safety > Safety Observations' and a '+ New' button. Below the header, there's a search bar and filters for Status (All) and Type (All). The table lists 7 records:

Type	Description	Status	Date	Actions
Positive	فريق التكيف ركب حواجز وعلامات تحذير حول فتحة التهوية المفتوحة في الـ	Open	2026-09-26	Edit Delete
Unsafe Condition	Compressor oil on the floor at the foot of the Chiller CH-01 acc...	Open	2026-09-26	Edit Delete
Unsafe Behavior	Technician not wearing eye protection during grinding	Closed	2026-09-23	Edit Delete
Positive	Team isolated and tagged panel correctly before work	Closed	2026-08-28	Edit Delete
Unsafe Condition	Trailing cable across walkway in plant room	Actioned	2026-08-28	Edit Delete
Unsafe Condition	Fire exit partially blocked by stored materials	Open	2026-08-22	Edit Delete
Unsafe Condition	Missing guard on workshop bench grinder	Open	2026-08-19	Edit Delete

Figure 261 The observation list with the new unsafe condition and a positive observation at the top.

The Safety Dashboard counts observations by type.

Record safety training

Who: HSE officer, HR

Where: Sidebar → HEALTH & SAFETY → **Safety Training**

Training records show who is trained in what and when each certificate runs out.

- 1 Open **Safety Training** and click **New**.
- 2 Under **TRAINEE & COURSE**, enter the **Employee** and **Course** (both required), the **Role / Position**, and choose the **Category** (Induction, Fire Safety, First Aid, Working At Height, Confined Space, Manual Handling).
- 3 Under **PROVIDER**, enter the **Training Provider**, **Trainer**, **Certificate No.**, **Training Hours** and **Score (0-100)**.
- 4 Under **STATUS & DATES**, pick the **Completed Date** and **Certificate Expiry**, and choose the **Status** (Scheduled, Completed, Expired).
- 5 Click **Create Safety Training**.

The screenshot shows the 'New Safety Training' form in the CAFM Way web app. The form is titled 'New Safety Training' and includes a subtitle 'Training & competency records with certificate expiry tracking per role'. The form is divided into several sections: 'TRAINEE & COURSE', 'PROVIDER', 'STATUS & DATES', and 'Notes'. The 'TRAINEE & COURSE' section contains fields for 'Employee *' (Khalid Al-Kuwari), 'Role / Position' (HVAC Technician), 'Course *' (Hot Work Safety & Fire Watch), and 'Category' (Fire Safety). The 'PROVIDER' section contains fields for 'Training Provider' (Doha Safety Training Centre), 'Trainer' (Hassan Kamal), 'Certificate No.' (DSTC-FW-2026-0412), 'Training Hours' (8), and 'Score (0-100)' (88). The 'STATUS & DATES' section contains fields for 'Completed Date' (2026-09-15), 'Certificate Expiry' (2027-09-15), and 'Status' (Completed). The 'Notes' section contains a text area with the text: 'Refresher due before the certificate expires; required for anyone acting as fire watch on hot-work permits.' The form has a 'Cancel' button and a '+ Create Safety Training' button.

Figure 262 Khalid Al-Kuwari's completed hot-work and fire-watch course, certificate valid to September 2027.

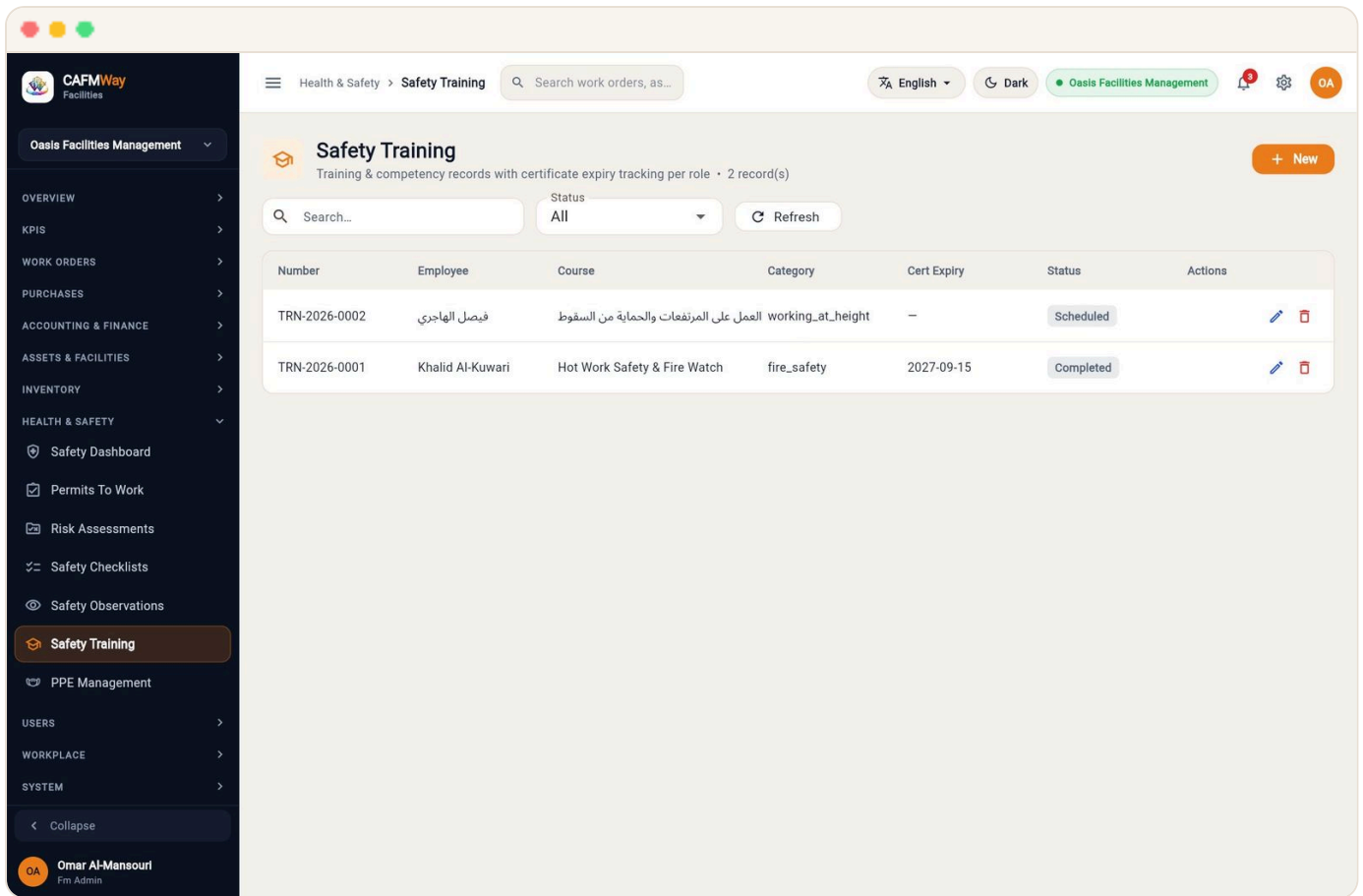


Figure 263 The training register with one completed course and one scheduled.

TIP

Record a course as **Scheduled** as soon as it is booked, with no dates. Change it to **Completed** and add the certificate details after the course.

Issue PPE

Who: storekeeper, HSE officer, supervisor

Where: Sidebar → HEALTH & SAFETY → **PPE Management**

PPE Management tracks each item of personal protective equipment issued to a person: what it is, which task it is for, its condition, and when it must be inspected, returned or replaced.

- 1 Open **PPE Management** and click **New**.
- 2 Under **ITEM DETAILS**, enter the **PPE Item** (required), choose the **Category** (Head, Eye, Hearing, Respiratory, Hand, Foot, Body, Fall Protection) and the **Task Type** (Hot Work, Height, General, Electrical, Confined Space), and enter the **Brand**, **Size** and **Serial No.**
- 3 Under **ISSUANCE**, enter **Issued To (name)**, **Quantity**, **Condition** (New, Good, Worn, Damaged), **Unit Cost (QAR)** and **Supplier**, and leave **Status** as **Issued**.
- 4 Under **DATES & INSPECTION**, pick the **Issued Date**, **Expiry Date** and **Next Inspection**. Leave **Return Date** empty until the item comes back.
- 5 Click **Create PPE Management**. The record gets a number such as `PPE-2026-0001`.

The screenshot displays the 'New PPE Management' form within the CAFM Way application. The form is divided into four main sections: ITEM DETAILS, ISSUANCE, and DATES & INSPECTION. The 'ITEM DETAILS' section includes fields for PPE Item (Auto-darkening welding helmet), Category (Eye), Task Type (Hot Work), Brand (3M Speedglas 9100), Size (Universal), and Serial No. (SG9100-448213). The 'ISSUANCE' section includes fields for Issued To (name) (Khalid Al-Kuwari), Quantity (1), Condition (New), Unit Cost (QAR) (1450), Supplier (Gulf Safety Supplies), and Status (Issued). The 'DATES & INSPECTION' section includes fields for Issued Date (2026-09-27), Expiry Date (2028-09-27), Return Date (Select date), and Next Inspection (2026-12-27). The form has a 'Cancel' button and a '+ Create PPE Management' button at the bottom right.

Section	Field	Value
ITEM DETAILS	PPE Item *	Auto-darkening welding helmet
	Category	Eye
	Task Type	Hot Work
	Brand	3M Speedglas 9100
	Size	Universal
	Serial No.	SG9100-448213
ISSUANCE	Issued To (name)	Khalid Al-Kuwari
	Quantity	1
	Condition	New
	Unit Cost (QAR)	1450
	Supplier	Gulf Safety Supplies
	Status	Issued
DATES & INSPECTION	Issued Date	2026-09-27
	Expiry Date	2028-09-27
	Return Date	Select date
	Next Inspection	2026-12-27

Figure 264 An auto-darkening welding helmet issued to Khalid Al-Kuwari for hot work.

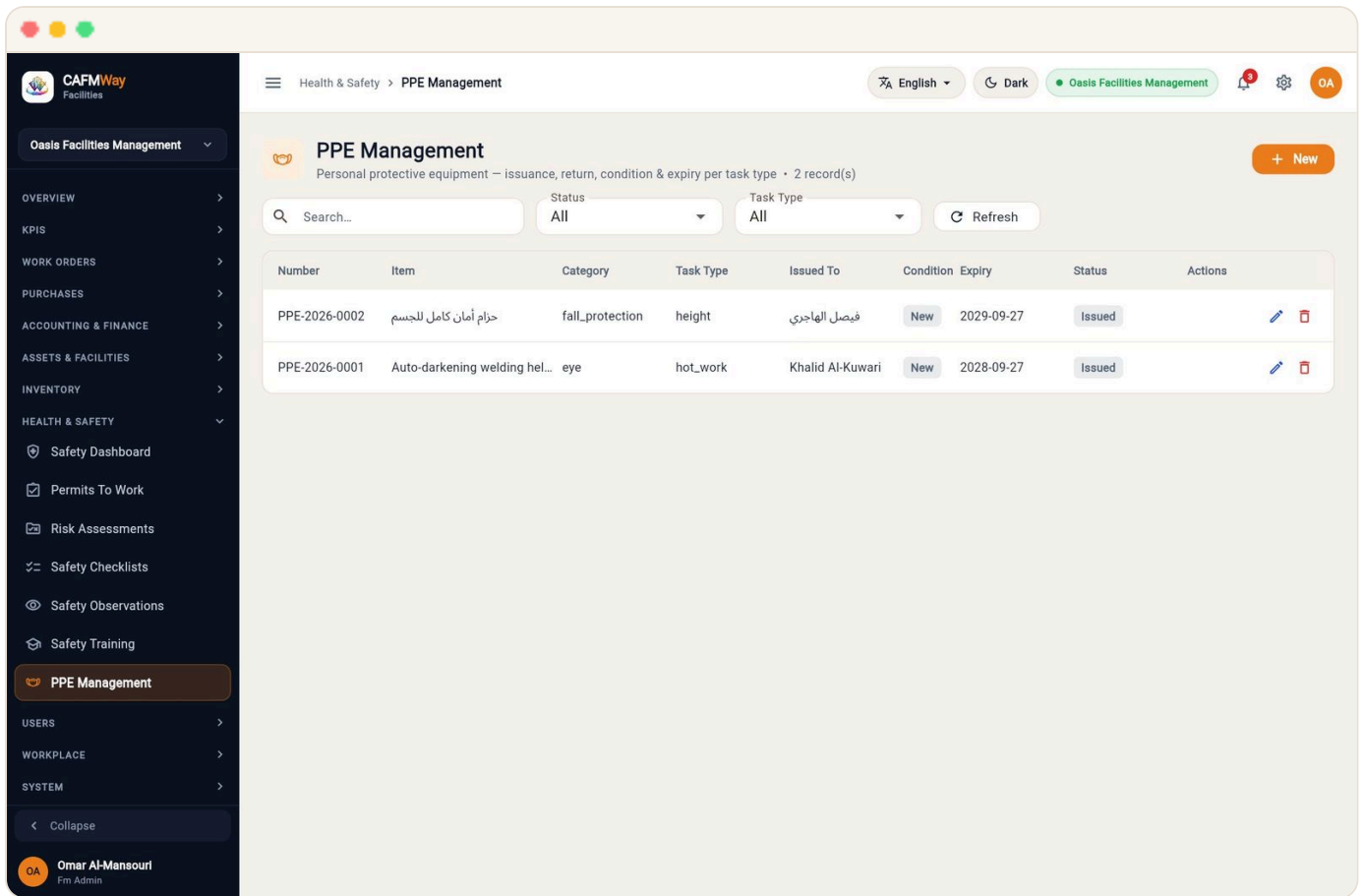


Figure 265 The PPE register with the welding helmet and a full-body harness.

When the item is returned, edit the record: set **Status** to **Returned**, pick the **Return Date** and update the **Condition**. Use **Lost** or **Expired** when that applies. Filter the list by **Task Type** to see, for example, everything issued for hot work.

People and shifts

The USERS section also holds guests, working patterns, rosters and leave. Users & Roles, Roles & Permissions and Organisation & SLA are covered in the administration part of this guide.

Give a guest a login

Who: users with the users module

Where: Sidebar → USERS → **Guests**

A guest login lets someone staying in or visiting a building (a hotel guest, a tenant, a visiting consultant) raise their own work orders from the requestor app for the length of their stay, instead of phoning the helpdesk.

- 1 Open **Guests** and click **New Guest**.
- 2 Enter the **FULL NAME** as it should appear on jobs, and the **EMAIL**. The guest signs in with this email or with the guest ID.
- 3 Enter the **PHONE** (optional) and choose the **LOCATION** the guest is staying in.
- 4 Set **STAY STARTS** and **STAY ENDS**. The login works only between these times: before the start the guest is told the access has not started, after the end that it has ended.
- 5 Enter a **PASSWORD** and repeat it in **CONFIRM PASSWORD**.
- 6 Click **Create Guest**. The **Guest created** box shows the **GUEST ID**, for example **G-4633**. Click the copy icon to copy it, then **Done**.

The screenshot shows the 'New Guest' form in the CAFMWay web app. The form is a modal window with the following fields:

- FULL NAME:** Jassim Al-Obaidli
- EMAIL:** jassim.guest@oasis-fm.test
- PHONE:** +974 5550 0141
- LOCATION:** Tower A - building
- STAY STARTS:** 26 Sep 13:00
- STAY ENDS:** 28 Sep 13:00
- PASSWORD:** (masked with dots)
- CONFIRM PASSWORD:** (masked with dots)

At the bottom of the form are two buttons: 'Cancel' and 'Create Guest'.

Figure 266 The New Guest form for a visiting consultant staying in Tower A.

The screenshot shows the 'Guest created' confirmation dialog in the CAFMWay web app. The dialog displays the following information:

- GUEST ID:** G-4633
- Instructions:** The guest signs in to the requestor app with this ID or their email, and the password you set. The password cannot be shown again – use "Set password" if it is lost.

At the bottom of the dialog is a 'Done' button.

The background shows the 'Guests' management page with a table of guests:

Guest ID	Name	Stay	Status
G-4633	Jassim Al-Obaidli	26 Sep 13:00 - 28 Sep 13:00	Checked in

Figure 267 Guest created: the guest ID G-4633 with the sign-in instructions.

Give the guest their ID and password in person or by a secure channel.

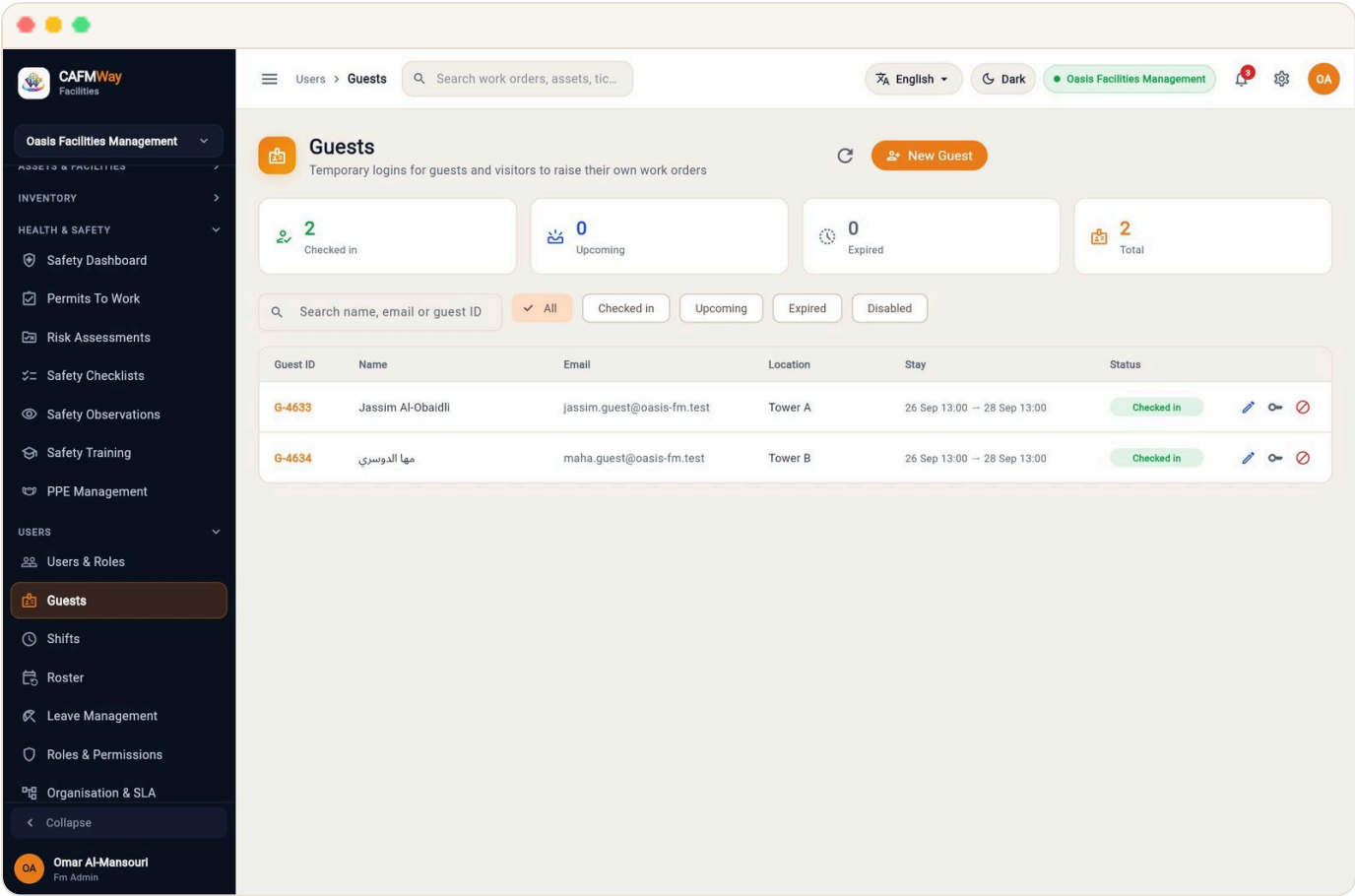


Figure 268 The guest list with two checked-in guests.

The counters at the top show guests **Checked in**, **Upcoming**, **Expired** and the **Total**; the chips filter the list the same way. On each row, the pencil edits the guest, the key icon (**Set password**) sets a new password, and the red icon (**End access**) ends the stay early.

BUSINESS RULE

The password cannot be shown again after the guest is created. If the guest loses it, use **Set password**.

Define shifts

Who: FM manager, supervisor
Where: Sidebar → USERS → **Shifts**

A shift is a working pattern: start time, end time and working days. Shifts are then assigned to people in the roster.

- 1 Open **Shifts** and click **New**.
- 2 Enter the **Shift Name**, for example HVAC Day Shift (Sun–Thu) .
- 3 Enter the **Start Time** and **End Time** as HH:MM in 24-hour time, for example 06:30 and 14:30 . An end time earlier than the start time means the shift runs past midnight.
- 4 Enter the **Working Days** as ISO day numbers separated by commas: Monday = 1 ... Sunday = 7. A Sunday-to-Thursday week is 7,1,2,3,4 . If you leave it empty, Monday to Friday is used.
- 5 Turn **Active** on, then click **Create Shifts**.

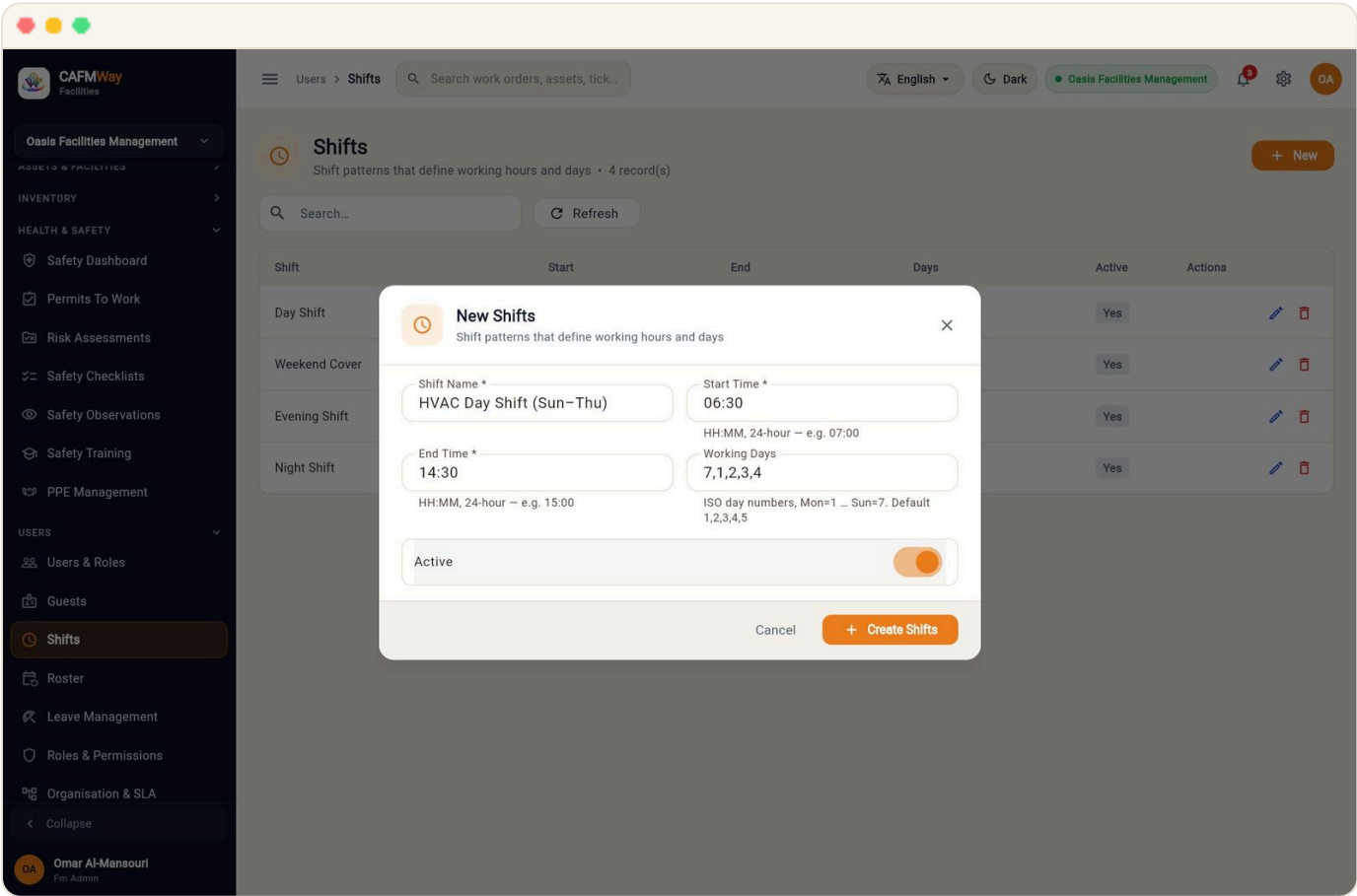


Figure 269 A new HVAC day shift from 06:30 to 14:30, Sunday to Thursday.

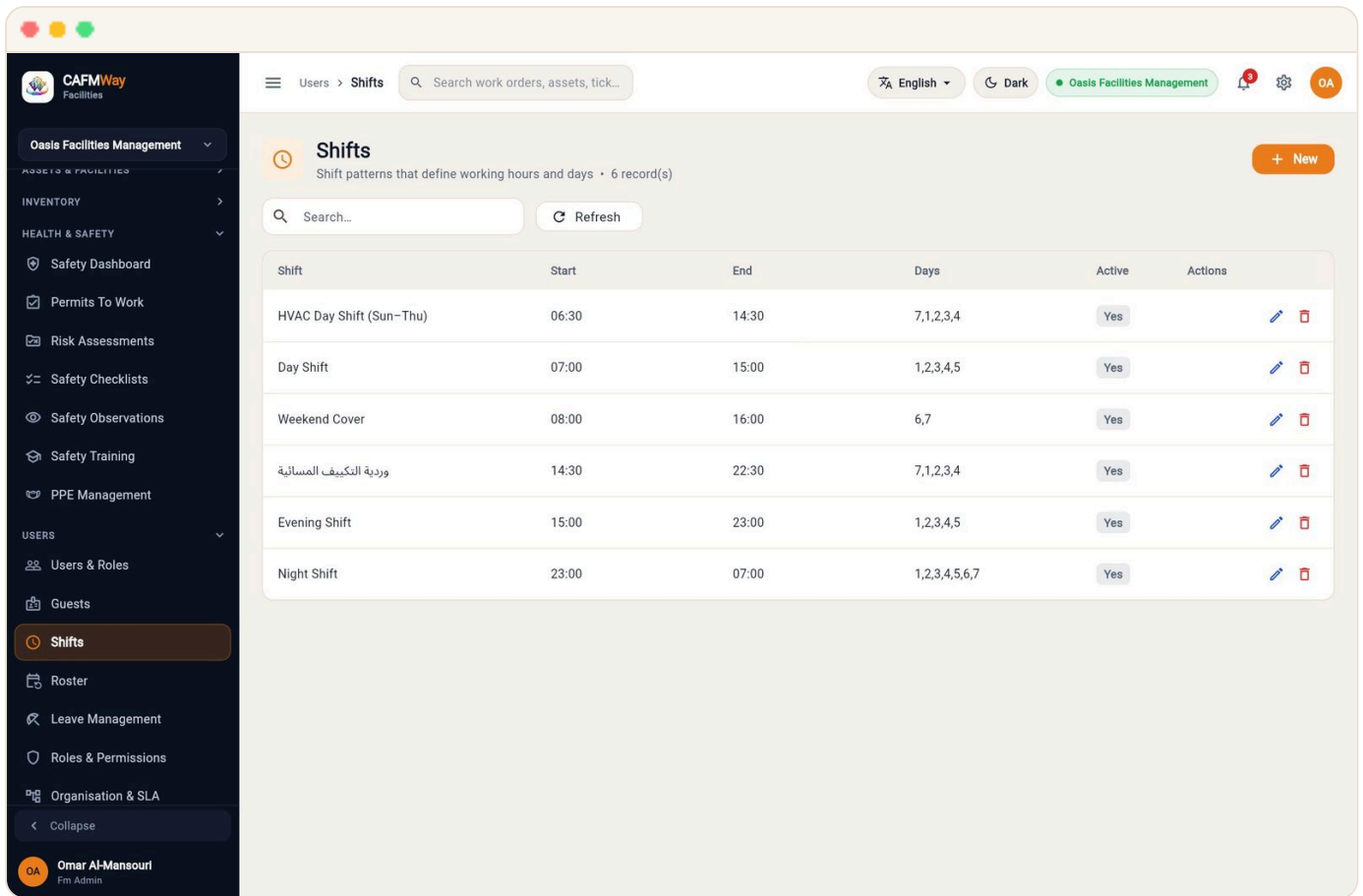


Figure 270 The shift list with the HVAC day and evening shifts beside the standard patterns.

CAUTION

Active is off on a new shift. Turn it on before you save, or the shift will not be offered for rostering.

BUSINESS RULE

The start and end times cannot be the same. A shift that is used in the roster cannot be deleted.

Roster the team

Who: FM manager, supervisor

Where: Sidebar → USERS → **Roster**

The roster assigns a shift to a technician from one date to another. The rostered hours feed technician utilisation on the Executive Dashboard and the hours-worked figure on the Safety Dashboard.

- 1 Open **Roster** and click **New**.
- 2 Click **Technician** and pick the person, for example Khalid Al-Kuwari of the HVAC team.
- 3 Click **Shift** and pick the shift, for example **HVAC Day Shift (Sun–Thu)**.
- 4 Pick the **From** date. Pick a **To** date, or leave it empty for an open-ended roster.
- 5 Click **Create Roster**.

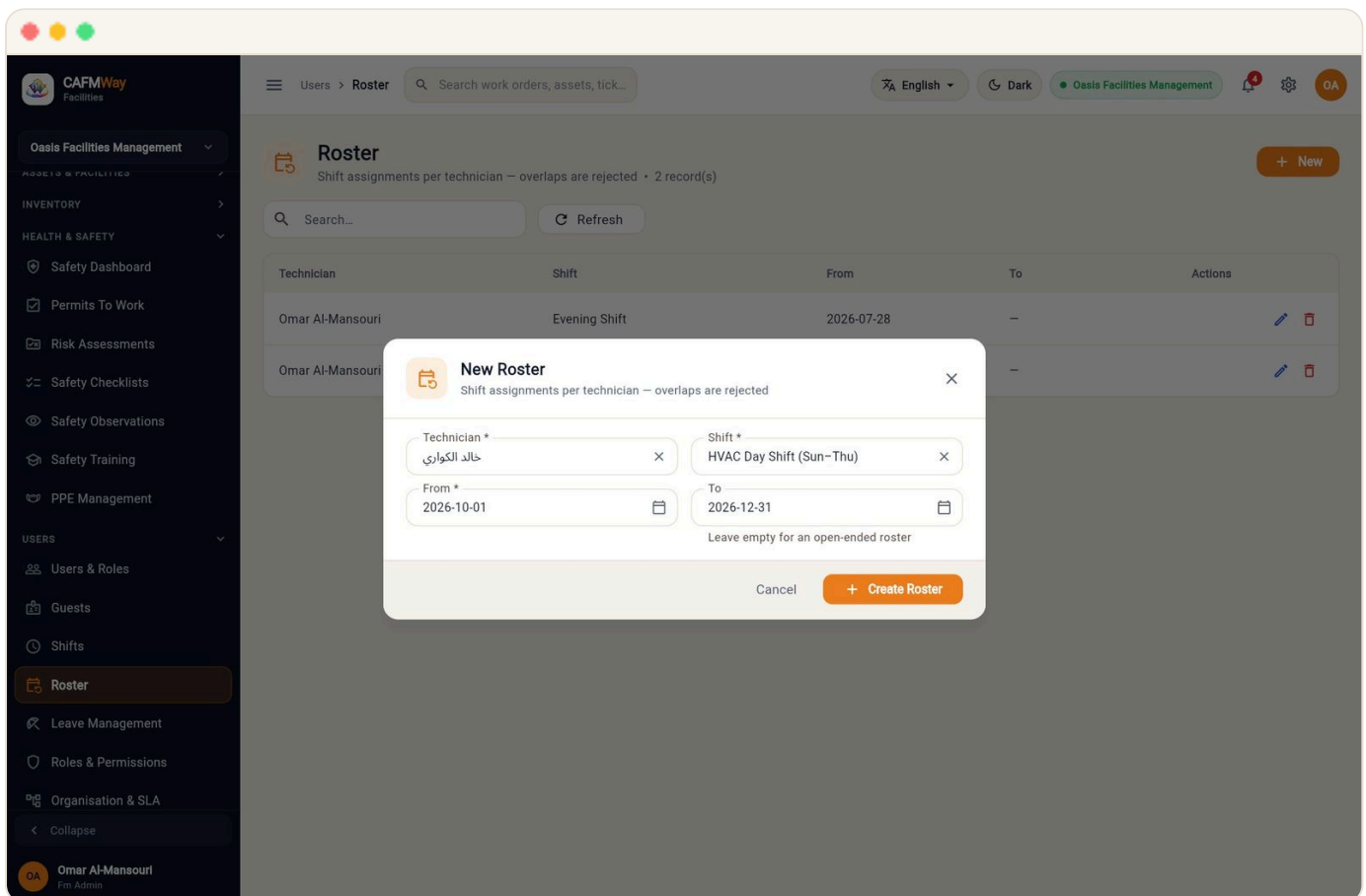


Figure 271 Khalid Al-Kuwari rostered on the HVAC day shift from 1 October to 31 December 2026.

Repeat for each member of the team. For the HVAC team in this example, Khalid Al-Kuwari covers the day shift and Faisal Al-Hajri the evening shift for the same quarter.

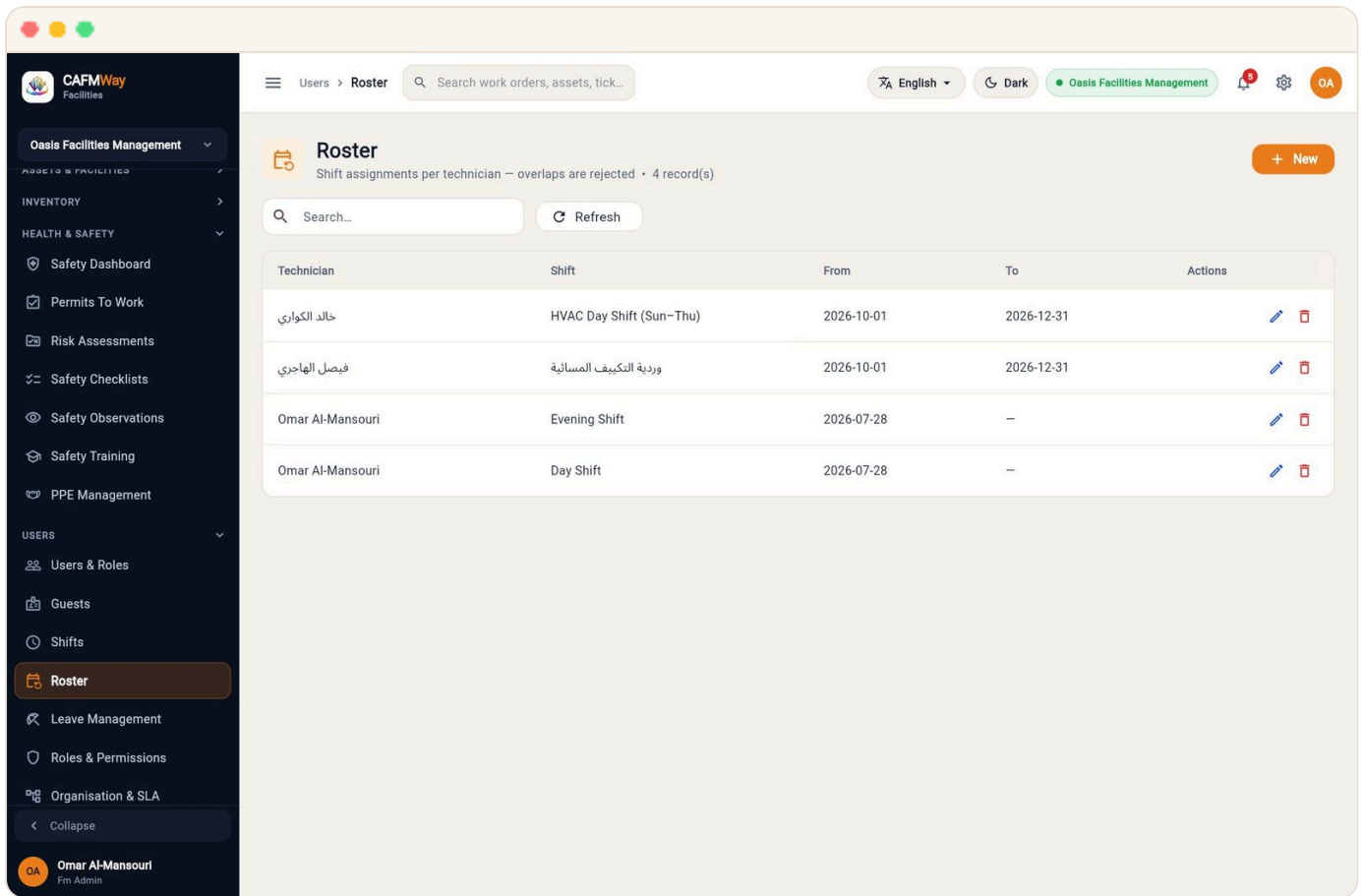


Figure 272 The roster with the HVAC day and evening shifts assigned for the fourth quarter.

BUSINESS RULE

A person can hold only one shift assignment for any date. If the dates overlap an existing assignment, the form shows "User already has a shift assignment overlapping this date range" and nothing is saved. End the old assignment (set its **To** date) first.

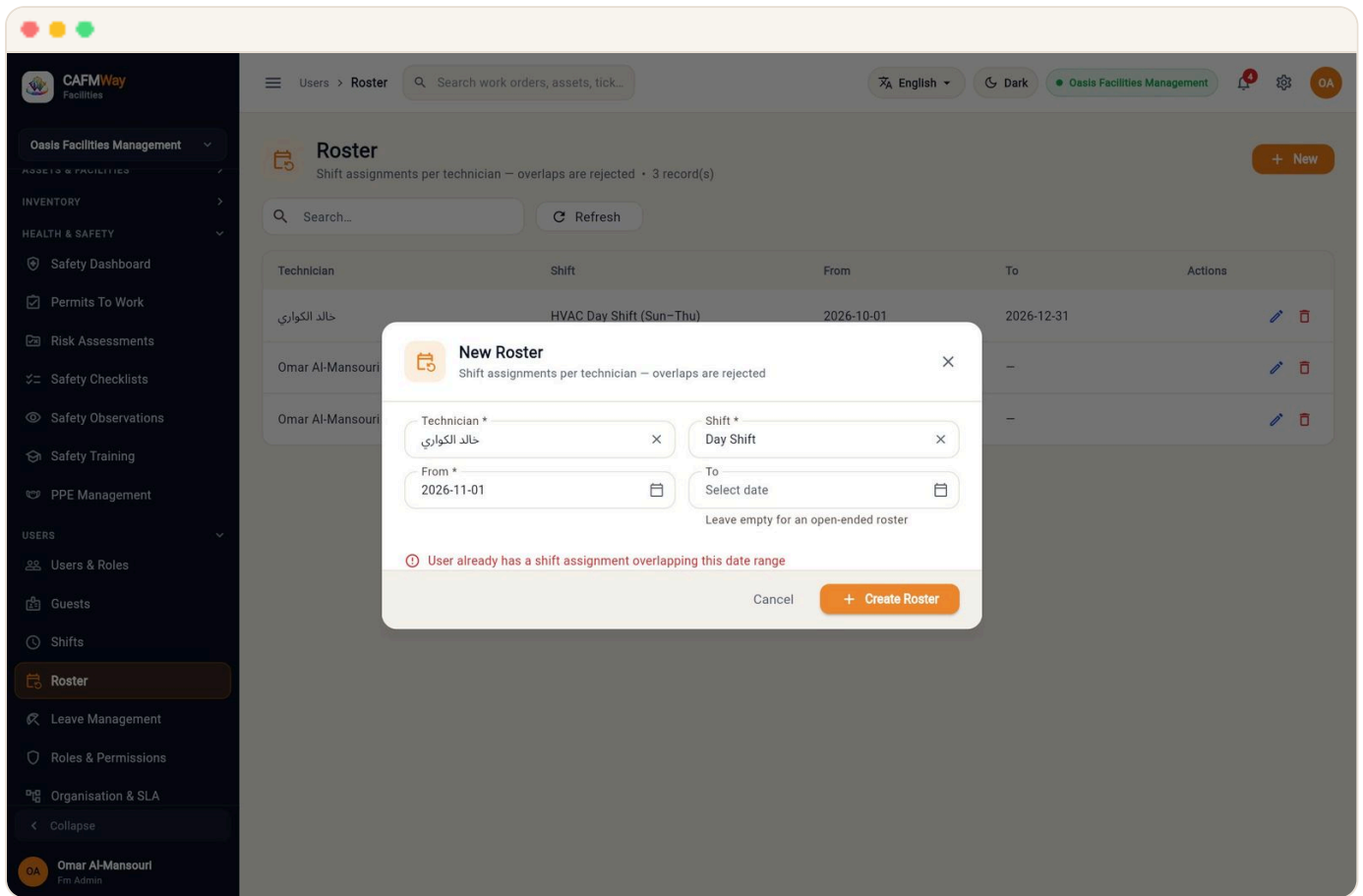


Figure 273 The overlap message when Khalid is given a second shift in the same period.

Request leave

Who: employees file their own leave; managers with write permission can file for others

Where: Sidebar → USERS → **Leave Management**

- 1 Open **Leave Management** and click **New**.
- 2 Click **Employee** and pick the person.
- 3 Choose the **Leave Type**: Annual, Sick, Unpaid or Emergency.
- 4 Pick the **From** and **To** dates, both required.
- 5 Write the **Reason**, including who covers the work, and click **Create Leave Management**.
The request is saved as **Pending**.

The screenshot displays the CAFM Way web application interface. On the left is a dark sidebar with a menu including 'Oasis Facilities Management', 'INVENTORY', 'HEALTH & SAFETY', and 'USERS'. The 'USERS' section is expanded, showing 'Users & Roles', 'Guests', 'Shifts', 'Roster', and 'Leave Management' (which is highlighted). The main content area is titled 'Leave Management' and shows a table of leave requests. A modal window titled 'New Leave Management' is open in the center, containing the following fields:

- Employee ***: خالد الكواري (Khalid Al-Kuwari)
- Leave Type**: Annual
- From ***: 2026-11-15
- To ***: 2026-11-19
- Reason**: Family travel. Faisal Al-Hajri covers HVAC call-outs for the week.

At the bottom of the modal are 'Cancel' and '+ Create Leave Management' buttons. The background table shows two records for Omar Al-Mansouri.

Figure 274 Khalid Al-Kuwari's annual leave request for 15 to 19 November, with Faisal covering HVAC call-outs.

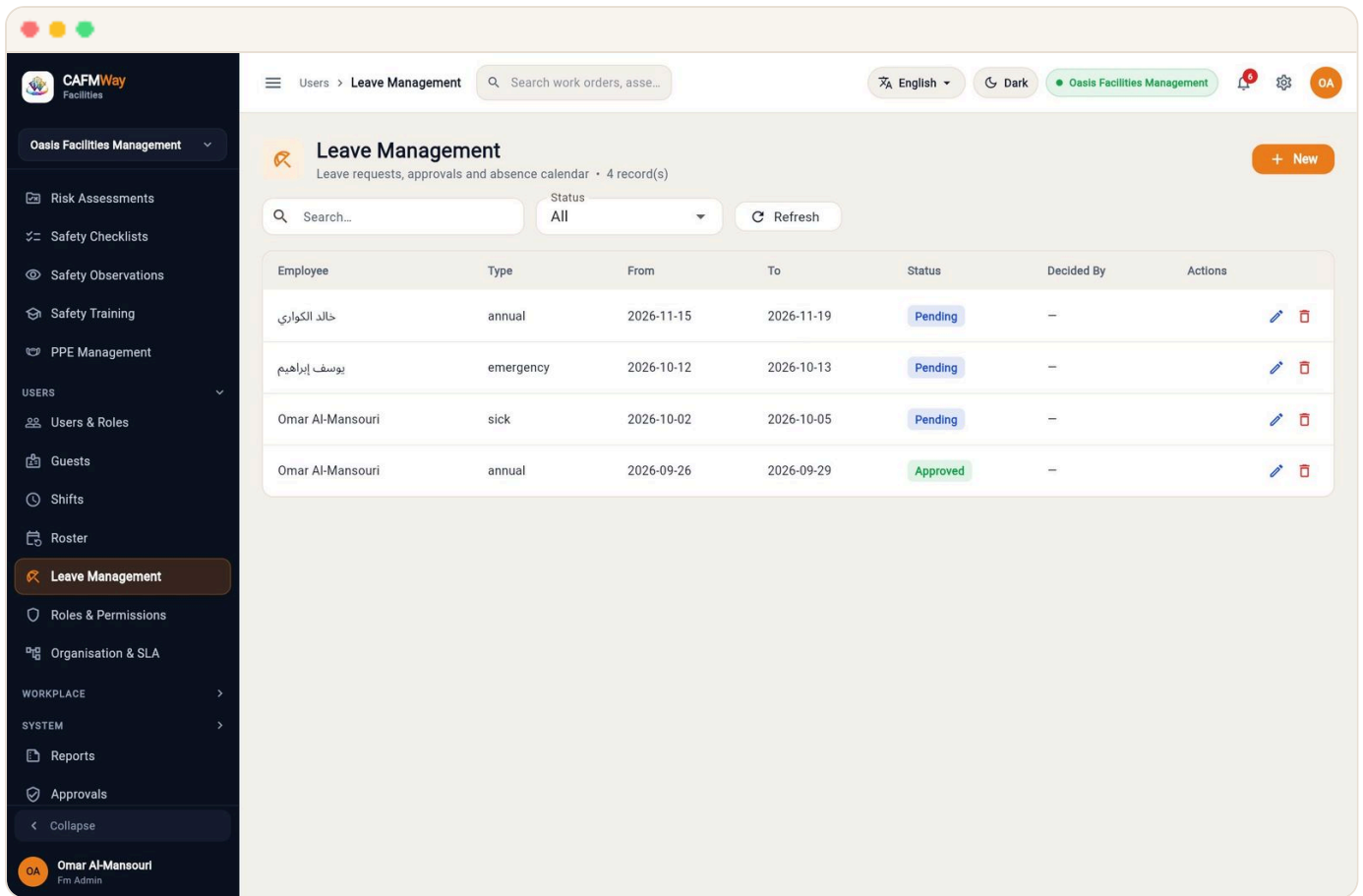


Figure 275 The leave list with the new pending requests.

BUSINESS RULE

The end date cannot be before the start date. A person cannot have two pending or approved leave requests that overlap. A pending request can be edited; once it is decided it cannot.

NOTE

Approving or rejecting a leave request is not available in the web app yet. Requests stay **Pending** and the **Decided By** column stays empty.

Workplace

The WORKPLACE section covers the services a facilities team runs for the people in the building: meeting room booking, waste collection and the document library.

Book a meeting room

Who: anyone with the resources module can book; FM manager or workplace coordinator approves

Where: Sidebar → WORKPLACE → **Space Booking**

Space Booking has three tabs: **Calendar** (a week of every bookable space), **Bookings** (the list, where bookings are approved) and **Bookable Spaces** (the catalogue of rooms, desks and facilities).

Add a bookable space

- 1 Open the **Bookable Spaces** tab and click **New**.
- 2 Enter the **Name**, choose the **Type** (Room, Desk, Facility) and enter the **Capacity**.
- 3 Turn **Active** on and click **Create Bookable Spaces**.

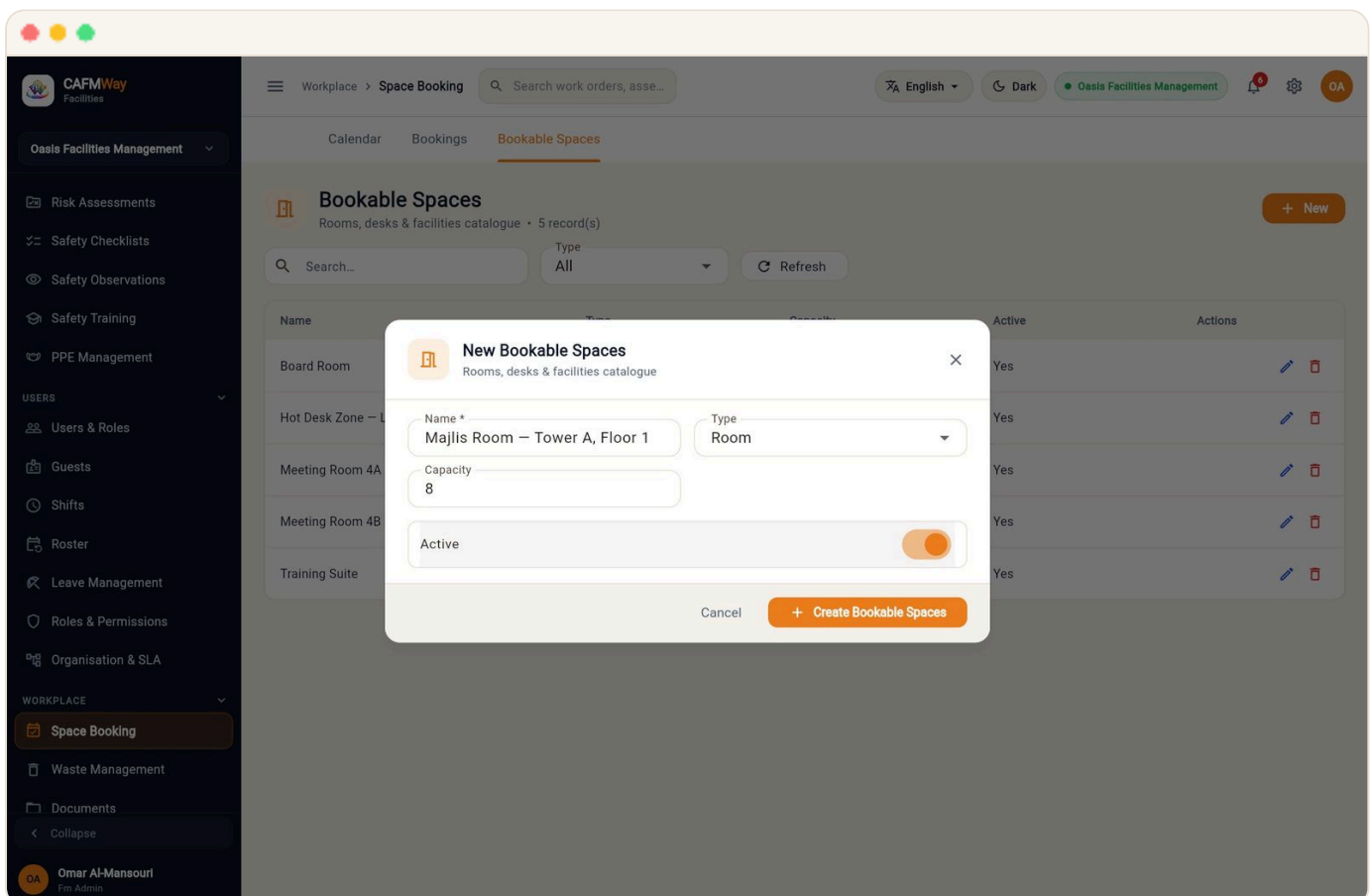


Figure 276 A new bookable room: the Majlis Room on Tower A, Floor 1, for 8 people.

Book a time slot

- 1 Open the **Calendar** tab. Use the arrows to move between weeks, or **This week** to come back.
- 2 Find the room's row and the day's column, and click **Book**. Past days have no **Book** link.
- 3 Enter the **Title** of the meeting.
- 4 Click **From** and **To** and set the times on the clock.
- 5 Click **Book**. The booking appears in the cell in orange (**Pending**).

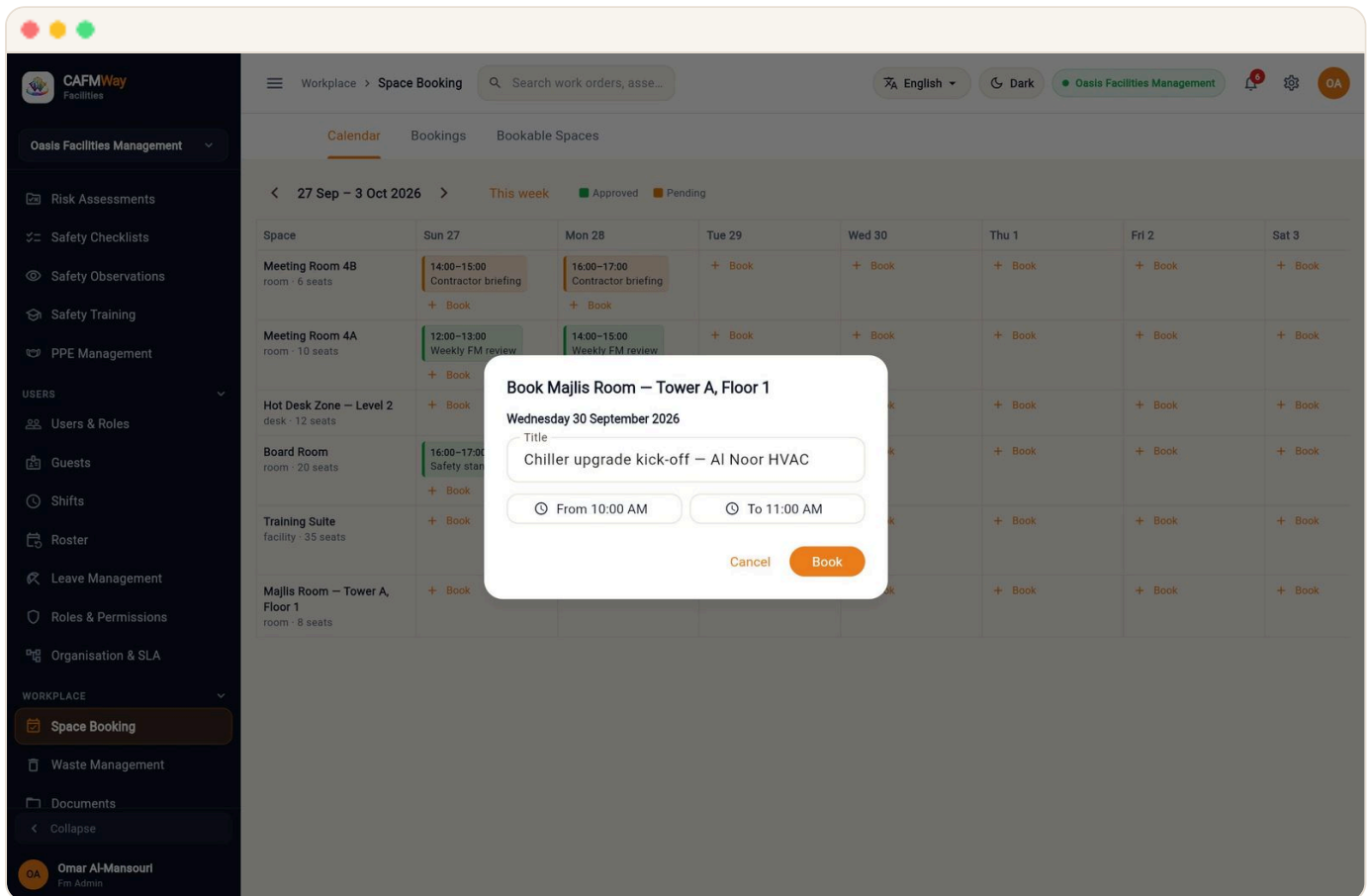


Figure 277 Booking the Majlis Room on Wednesday 30 September from 10:00 to 11:00.

Approve the booking

- 1 Open the **Bookings** tab. Pending bookings show a green tick (**Approve**) and a red cross (**Reject**).
- 2 Click **Approve**. The status changes to **Approved** and the calendar shows the booking in green.

Space Bookings
Reserve rooms, desks & facilities • 11 record(s)

Search... Status: All Refresh

Title	Space	From	To	Status	Booked By	Actions
Chiller upgrade kick-off – Al Noor H...Majlis Room – Tower ...		2026-09-30	2026-09-30	Pending	Omar Al-Mansouri	✓ ✕ 🗑
Safety stand-down	Board Room	2026-09-28	2026-09-28	Approved	Omar Al-Mansouri	🗑
Contractor briefing	Meeting Room 4B	2026-09-28	2026-09-28	Pending	Omar Al-Mansouri	✓ ✕ 🗑
Weekly FM review	Meeting Room 4A	2026-09-28	2026-09-28	Approved	Omar Al-Mansouri	🗑
Training session	Hot Desk Zone – Level 2	2026-09-28	2026-09-28	Rejected	Omar Al-Mansouri	🗑
Client walkthrough	Training Suite	2026-09-28	2026-09-28	Pending	Omar Al-Mansouri	✓ ✕ 🗑
Client walkthrough	Training Suite	2026-09-27	2026-09-27	Pending	Omar Al-Mansouri	✓ ✕ 🗑
Safety stand-down	Board Room	2026-09-27	2026-09-27	Approved	Omar Al-Mansouri	🗑
Contractor briefing	Meeting Room 4B	2026-09-27	2026-09-27	Pending	Omar Al-Mansouri	✓ ✕ 🗑
Training session	Hot Desk Zone – Level 2	2026-09-27	2026-09-27	Rejected	Omar Al-Mansouri	🗑
Weekly FM review	Meeting Room 4A	2026-09-27	2026-09-27	Approved	Omar Al-Mansouri	🗑

Figure 278 The bookings list with the new booking pending approval.

Calendar Bookings Bookable Spaces

< 27 Sep – 3 Oct 2026 > This week Approved Pending

Space	Sun 27	Mon 28	Tue 29	Wed 30	Thu 1	Fri 2	Sat 3
Meeting Room 4B room · 6 seats	14:00–15:00 Contractor briefing + Book	16:00–17:00 Contractor briefing + Book	+ Book	+ Book	+ Book	+ Book	+ Book
Meeting Room 4A room · 10 seats	12:00–13:00 Weekly FM review + Book	14:00–15:00 Weekly FM review + Book	+ Book	+ Book	+ Book	+ Book	+ Book
Hot Desk Zone – Level 2 desk · 12 seats	+ Book	+ Book	+ Book	+ Book	+ Book	+ Book	+ Book
Board Room room · 20 seats	16:00–17:00 Safety stand-down + Book	+ Book	+ Book	+ Book	+ Book	+ Book	+ Book
Training Suite facility · 35 seats	+ Book	12:00–13:00 Client walkthrough + Book	+ Book	+ Book	+ Book	+ Book	+ Book
Majlis Room – Tower A, Floor 1 room · 8 seats	+ Book	+ Book	+ Book	10:00–11:00 Chiller upgrade kick-off – Al Noor HVAC + Book	09:00–10:00 اجتماع تنسيق الصيانة الأسبوعي + Book	+ Book	+ Book

Figure 279 The week calendar with the approved bookings in the Majlis Room.

BUSINESS RULE

A room cannot be booked twice for overlapping times; the calendar refuses the second booking. The end time must be after the start time.

TIP

Book from the **Calendar** tab. The **New** form on the **Bookings** tab takes dates without times, so it cannot book a slot within one day.

Waste collection points and logs

Who: soft services supervisor, HSE officer

Where: Sidebar → WORKPLACE → **Waste Management**

Waste Management records where waste is collected and how much is collected each time, by type: general, recyclable, hazardous and organic.

Add a collection point

- 1 Open the **Collection Points** tab and click **New**.
- 2 Enter the **Code** and **Name**, for example **WP-006** "Tower A Roof — Used Oil & Filters".
- 3 Click **Location** and pick the place from Locations & Spaces.
- 4 Choose the **Waste Type** and click **Create Waste Collection Points**.
- 5 Click the QR icon (**Generate QR**) on the new row. The point gets a QR code that collectors can scan instead of choosing the bin from a list.

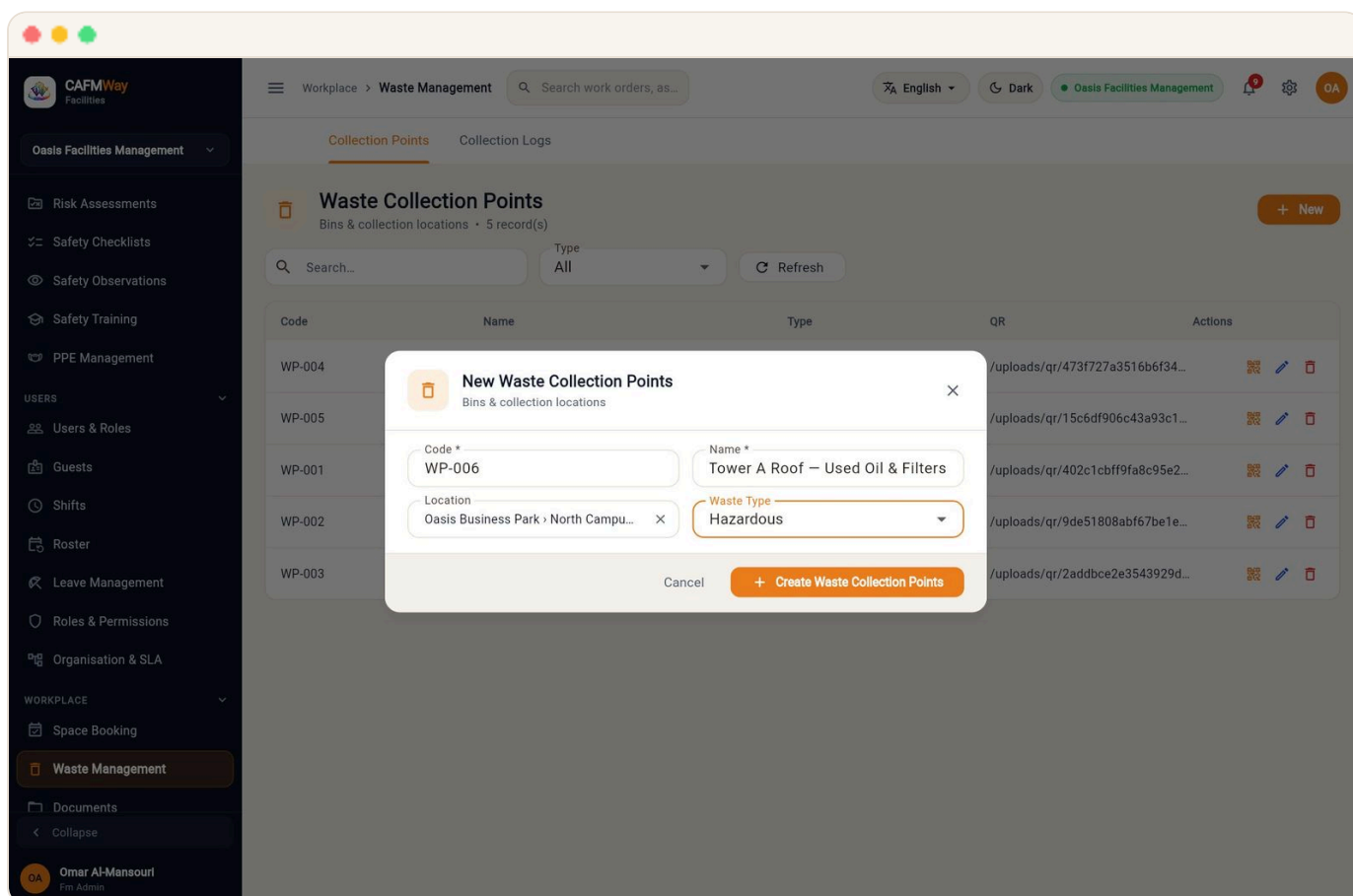


Figure 280 A new hazardous waste point on the Tower A roof for used oil and filters.

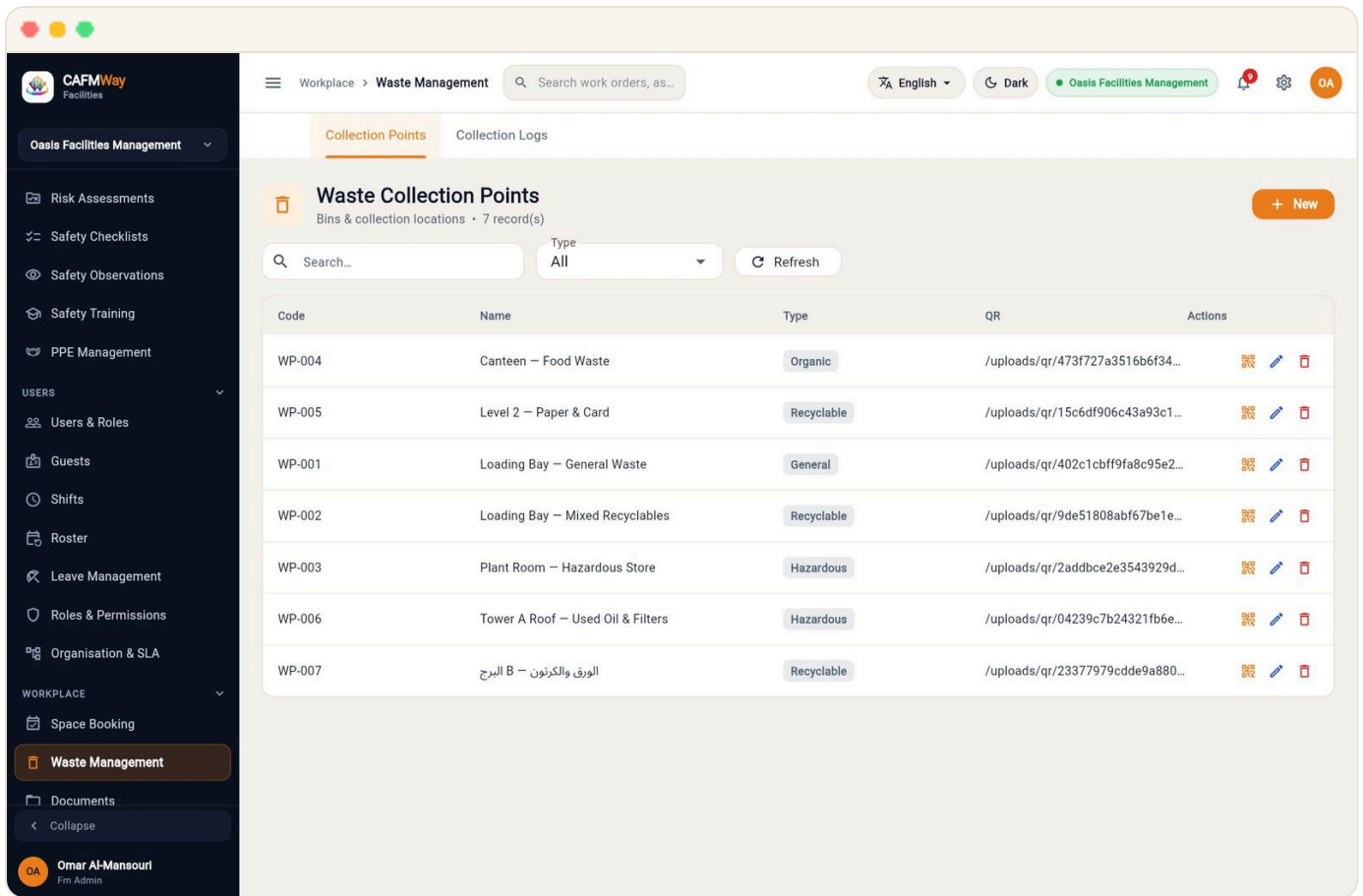


Figure 281 The collection points, each with its QR code generated.

Log a collection

- 1 Open the **Collection Logs** tab and click **New**.
- 2 Pick the **Collection Point**, choose the **Waste Type** and enter the **Weight (kg)** (required).
- 3 Pick the **Collected On** date and click **Create Waste Collection Logs**.

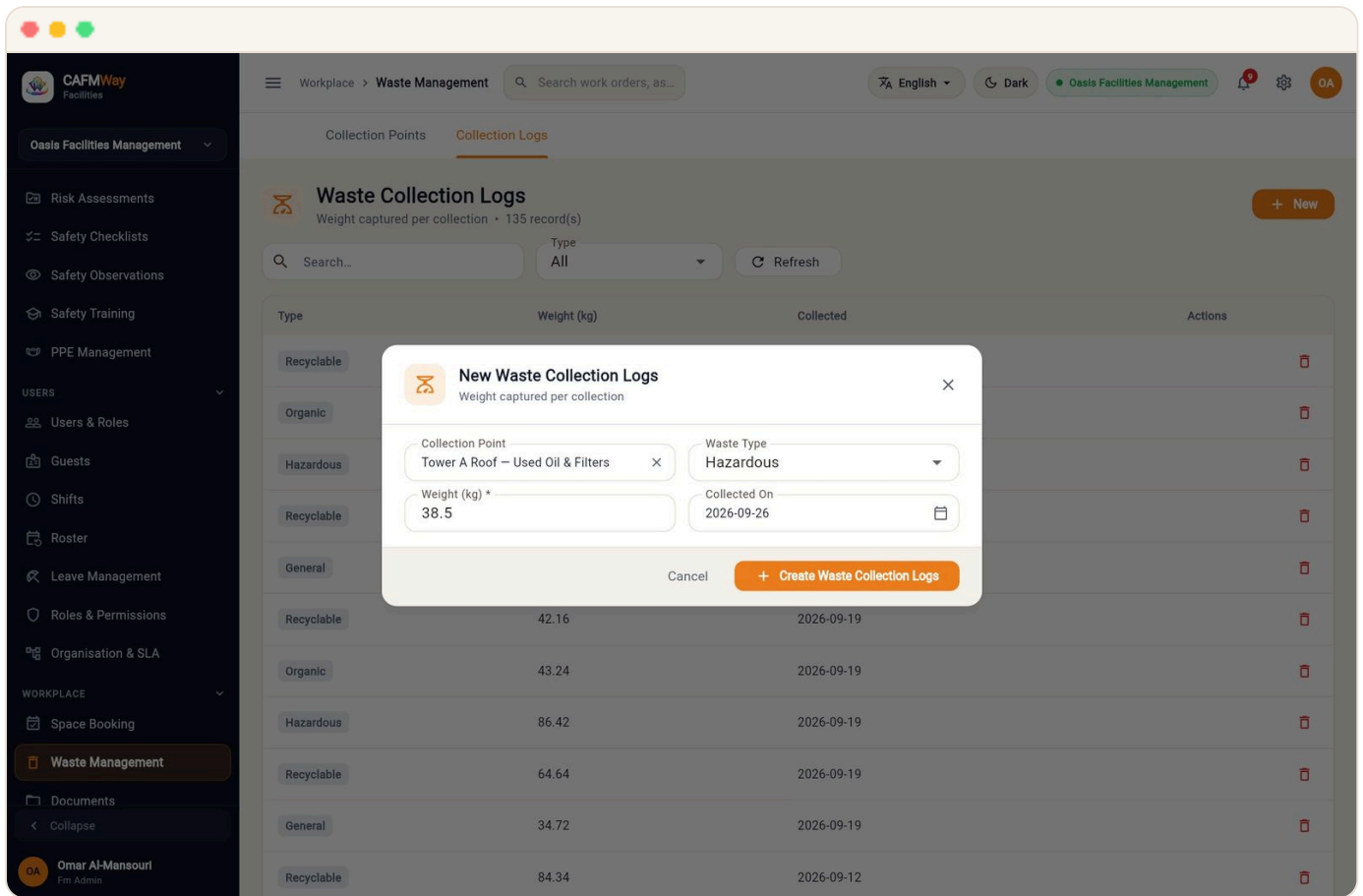


Figure 282 Logging 38.5 kg of hazardous waste from the Tower A roof point.

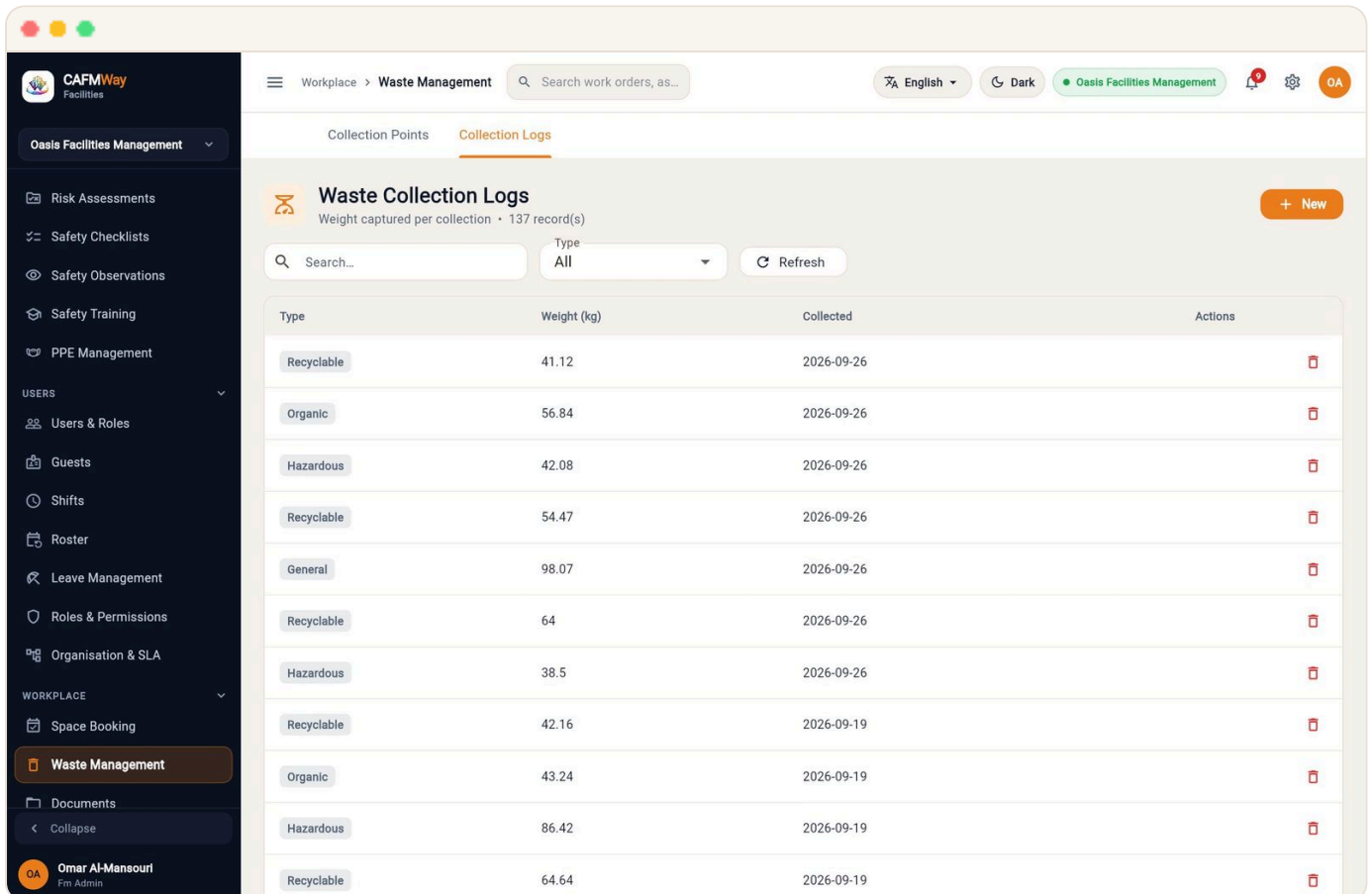


Figure 283 The collection log with the day's weights by type.

BUSINESS RULE

A collection log cannot be edited after it is saved; delete it and log it again if it is wrong.

Document library

Who: users with the resources module

Where: Sidebar → WORKPLACE → **Documents**

The document library is a register of controlled documents (procedures, manuals, drawings, certificates, contracts) with their category, version and tags.

- 1 Open **Documents** and click **New**.
- 2 Enter the **Title** (required) and the **Category**, for example **HSE**.
- 3 In **File URL** (required), paste the link to the file on your document server.
- 4 Enter **Tags (comma separated)** to make the document easy to find, for example **hse,hot-work,procedure**.
- 5 In **Linked Entity Type**, name the kind of record the document belongs to, for example **Permit**.
- 6 Click **Create Document Library**. The document is listed as version 1.

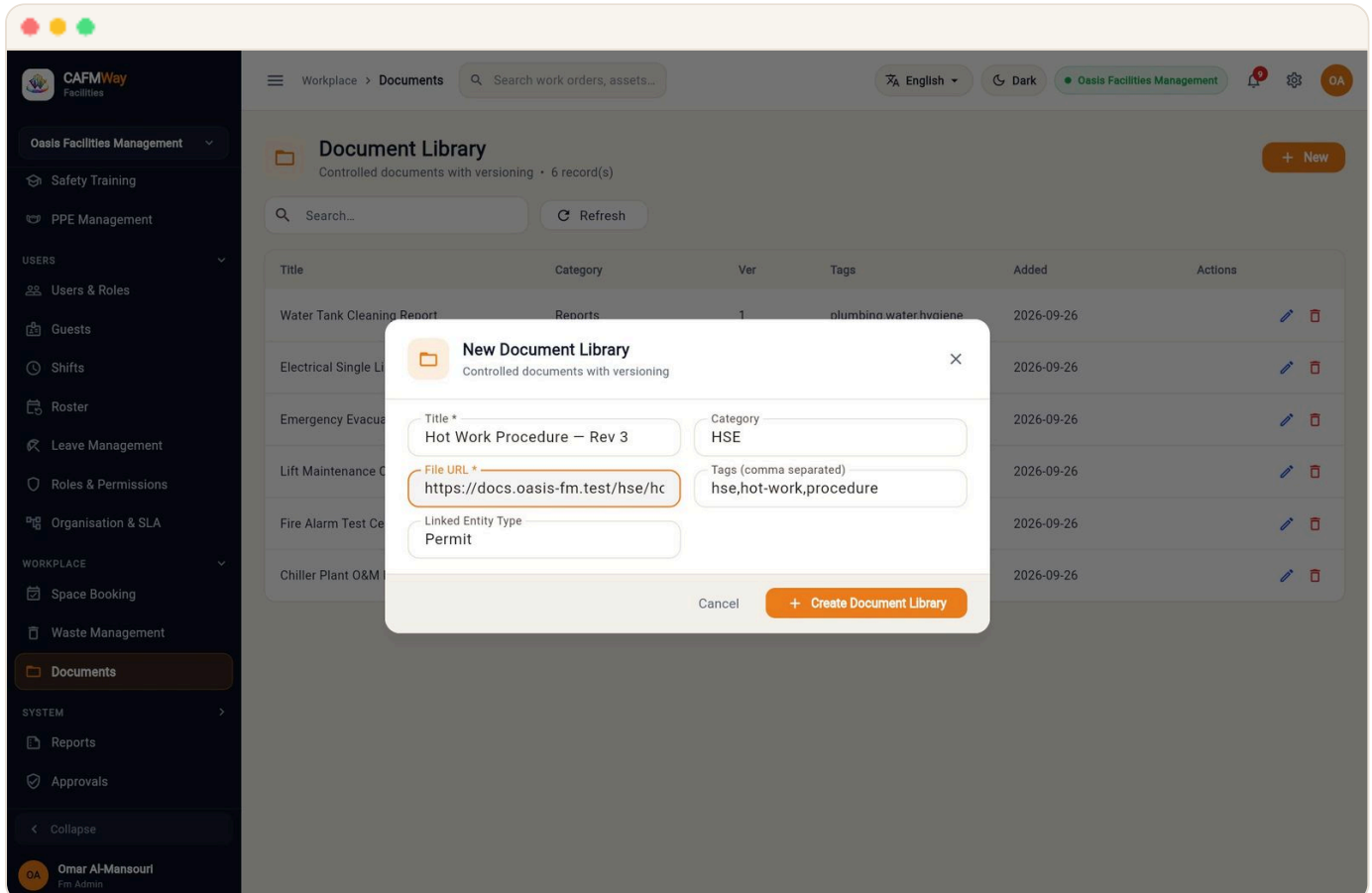


Figure 284 Registering the hot-work procedure, revision 3, in the document library.

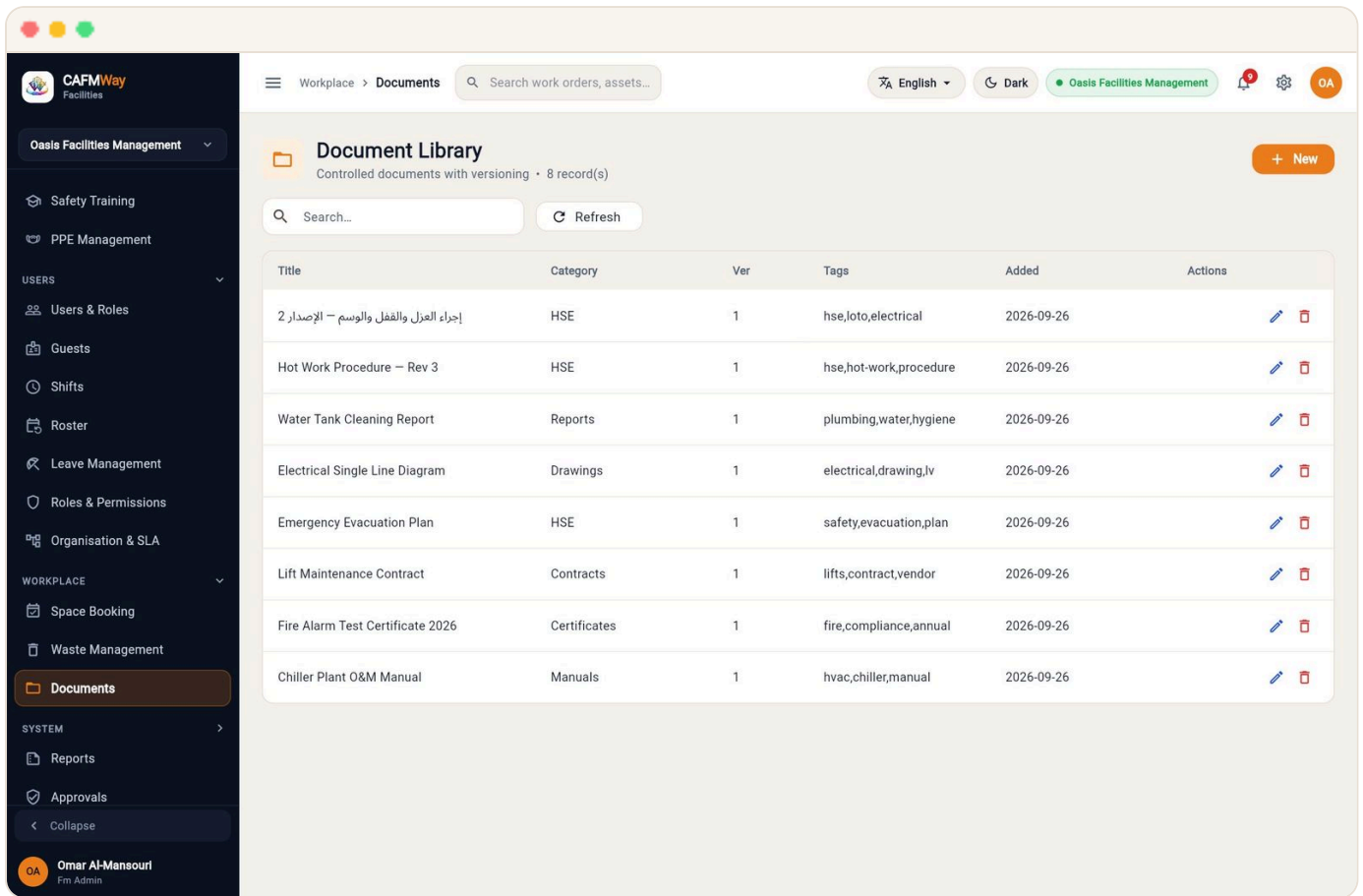


Figure 285 The document library with procedures, drawings, certificates and manuals.

NOTE

The library stores a link, not the file itself: upload the file to your document server first. Opening a document from the list and adding a new version are not available in the web app yet.

Documents attached to an asset are kept on the asset's **Documents** tab.

Notifications and messages

Notifications

Who: every user

Where: the bell in the top bar; Sidebar → SYSTEM → **Notifications**

CAFM Way notifies you about work that concerns you: new work orders waiting for assignment, jobs completed, mentions in messages, condition alerts and approvals.

- 1 The bell in the top bar shows the number of unread notifications. Click it to see the five most recent. Click **Mark all read** to clear the count, or **View all notifications** to open the full list.
- 2 On the **Notifications** page, switch between **All** and **Unread**.
- 3 Click a notification to open the record it is about. Once you have opened it, the notification is removed from the list. An orange dot marks unread items.
- 4 Click the × at the end of a row to delete that notification. **Mark All Read** marks the whole list read.

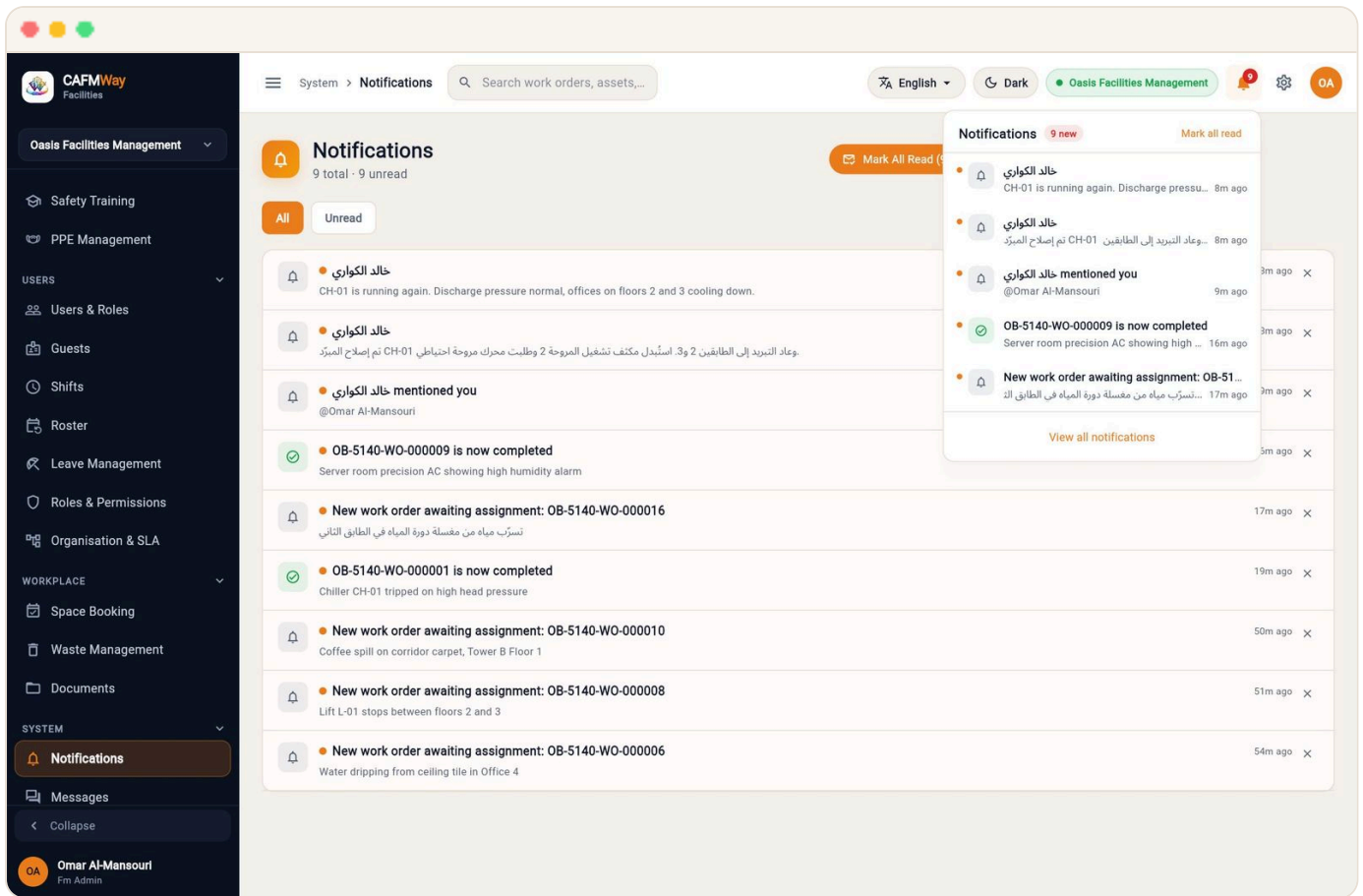


Figure 286 The bell panel with the latest five notifications.

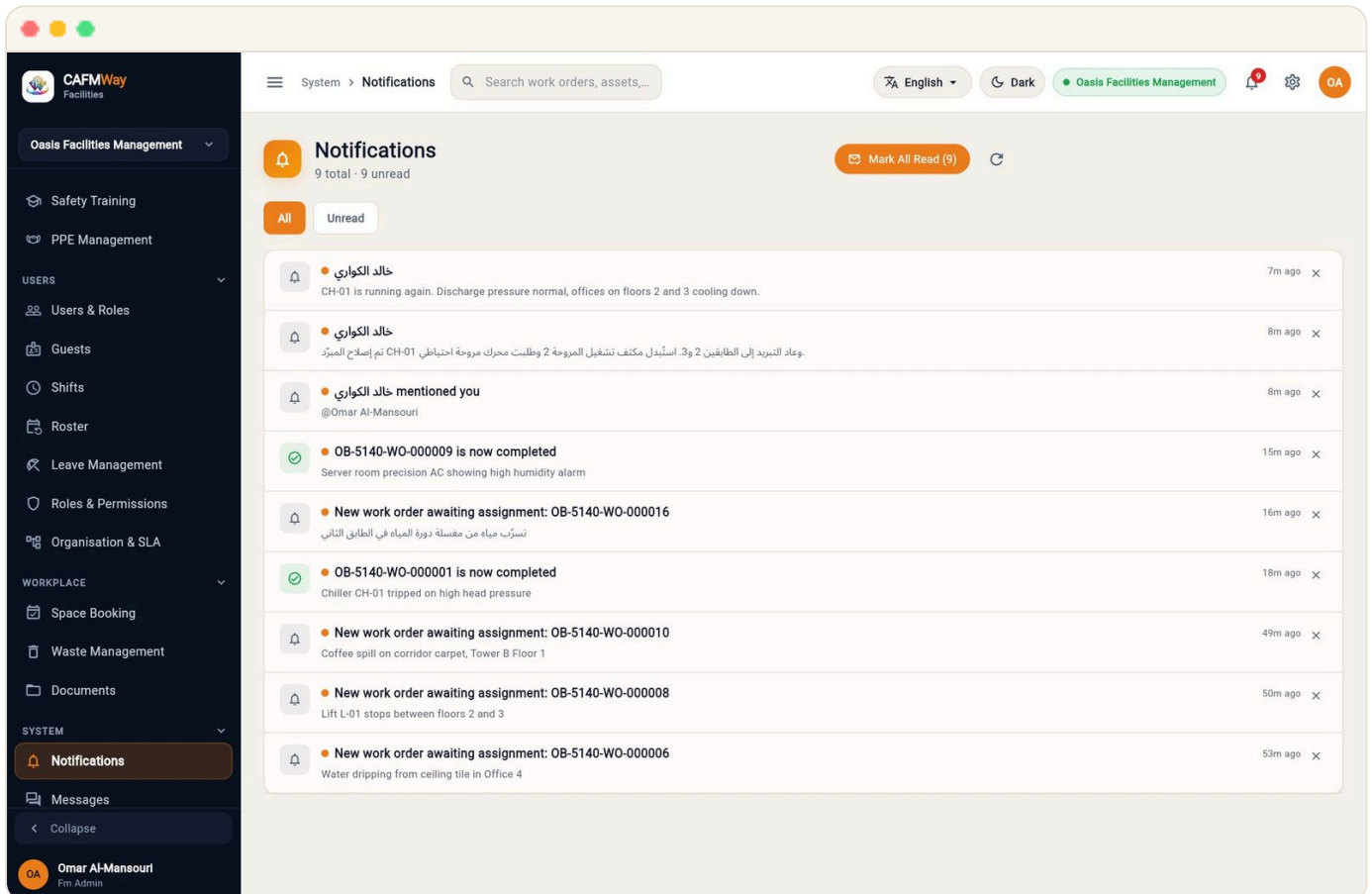


Figure 287 The Notifications page with unread work order and message notifications.

NOTE

Settings → **Notifications** does not yet let you choose which events notify whom or by which channel.

Send a message to a technician

Who: every user

Where: Sidebar → SYSTEM → Messages

Messages is the in-app chat. Each work order has its own conversation, and you can also start a direct conversation with anyone in the company. Technicians read and answer from the technician app.

- 1 Open **Messages**. The left column lists your conversations with the latest message and an unread count.
- 2 Click **New Message**.
- 3 Type a name or email in **Search people by name or email**, and tick the person, for example Khalid Al-Kuwari. Tick more than one person to start a group conversation.
- 4 Click **Start Chat**. The conversation opens on the right.
- 5 Type the message in **Type a message... use @ to mention someone** and click **Send**.

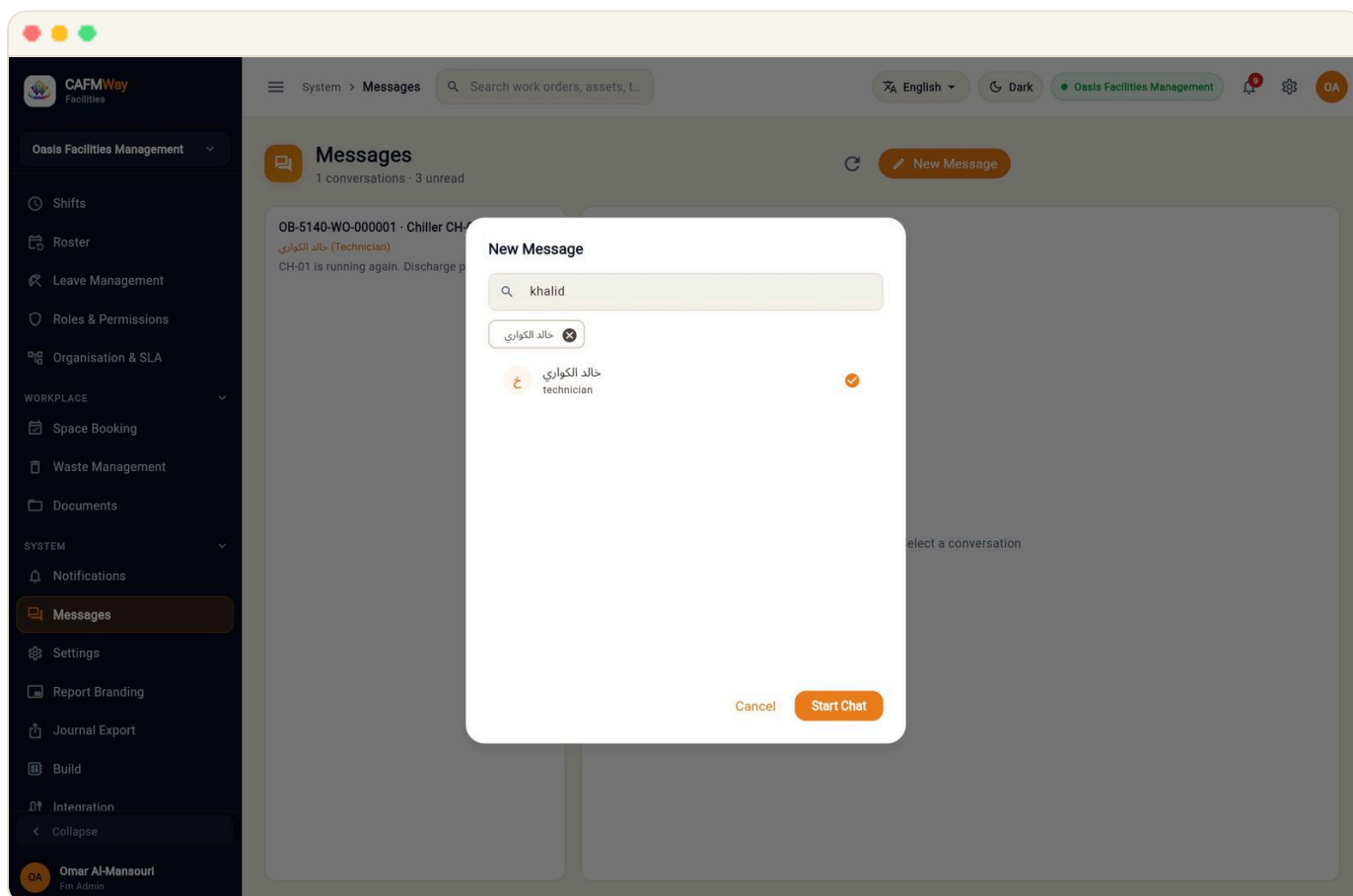


Figure 288 Starting a new conversation with Khalid Al-Kuwari.

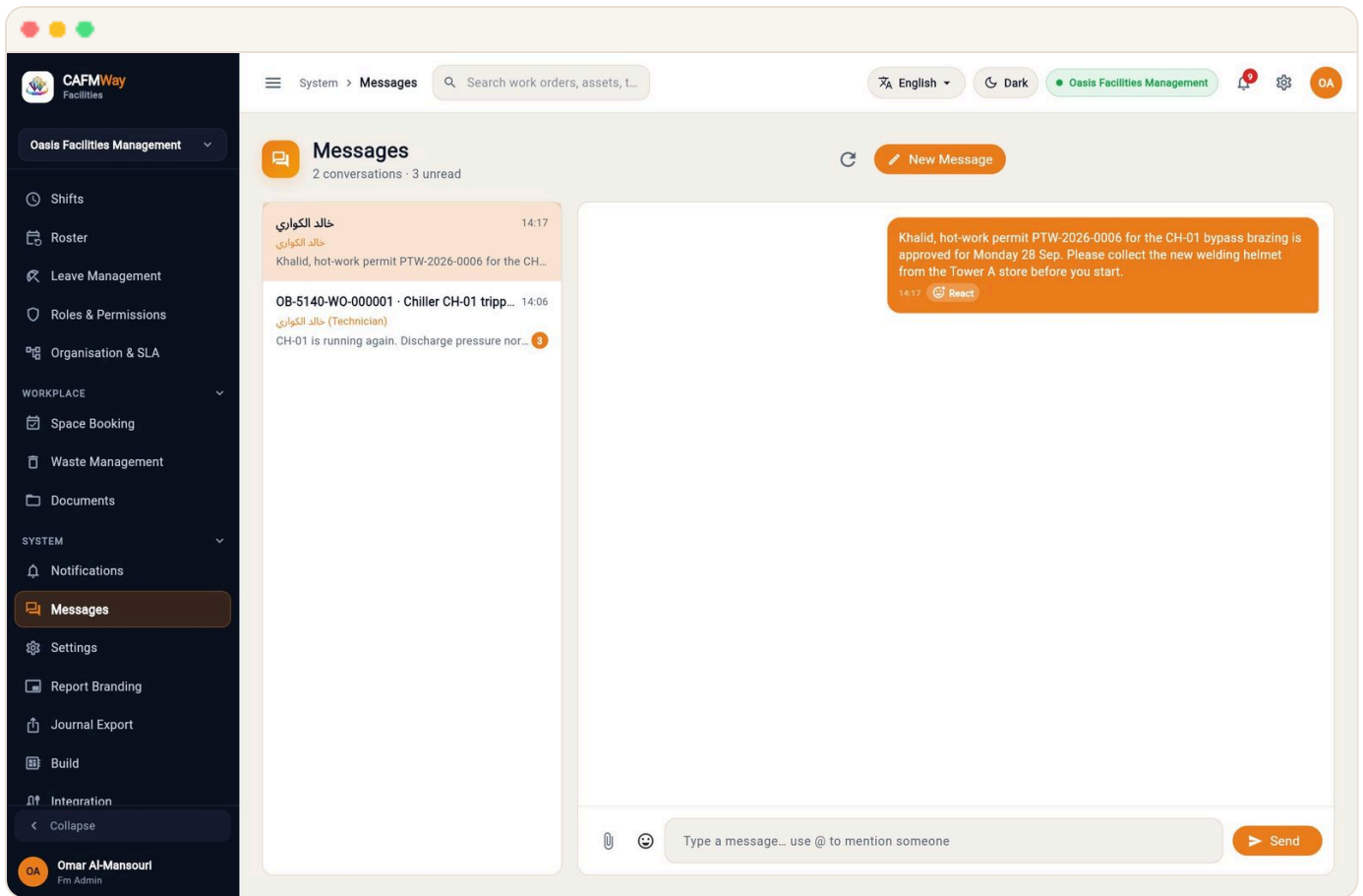


Figure 289 The conversation with the permit reminder sent to Khalid.

TIP

Type **@** followed by a name to mention someone; they get a notification. Use the paper clip to attach files and the smiley to add an emoji. Hover a message and click **React** to react to it.

Reports and branding

Run and print a report

Who: users with the analytics module; each report appears only if your role may read its data
Where: Sidebar → **Reports**

The Report Centre lists every report you are allowed to run, grouped by module: assets, contractors, contracts, finance, governance, health and safety, inventory, locations, planned maintenance, work orders. Each card has a template label that tells you what kind of page it prints:

Template	Prints
Register	A list of records with totals, for example the asset register or the training register.
Record	One record on its own page, for example a single permit or an asset data sheet.
Statement	Financial figures, for example the trial balance or contractor SLA penalties.
Labels	Sheets of QR stickers for assets or locations.
Calendar	A month grid, for example the PPM calendar.
Executive	A summary page for management.

A small page icon on a card means the report prints in landscape.

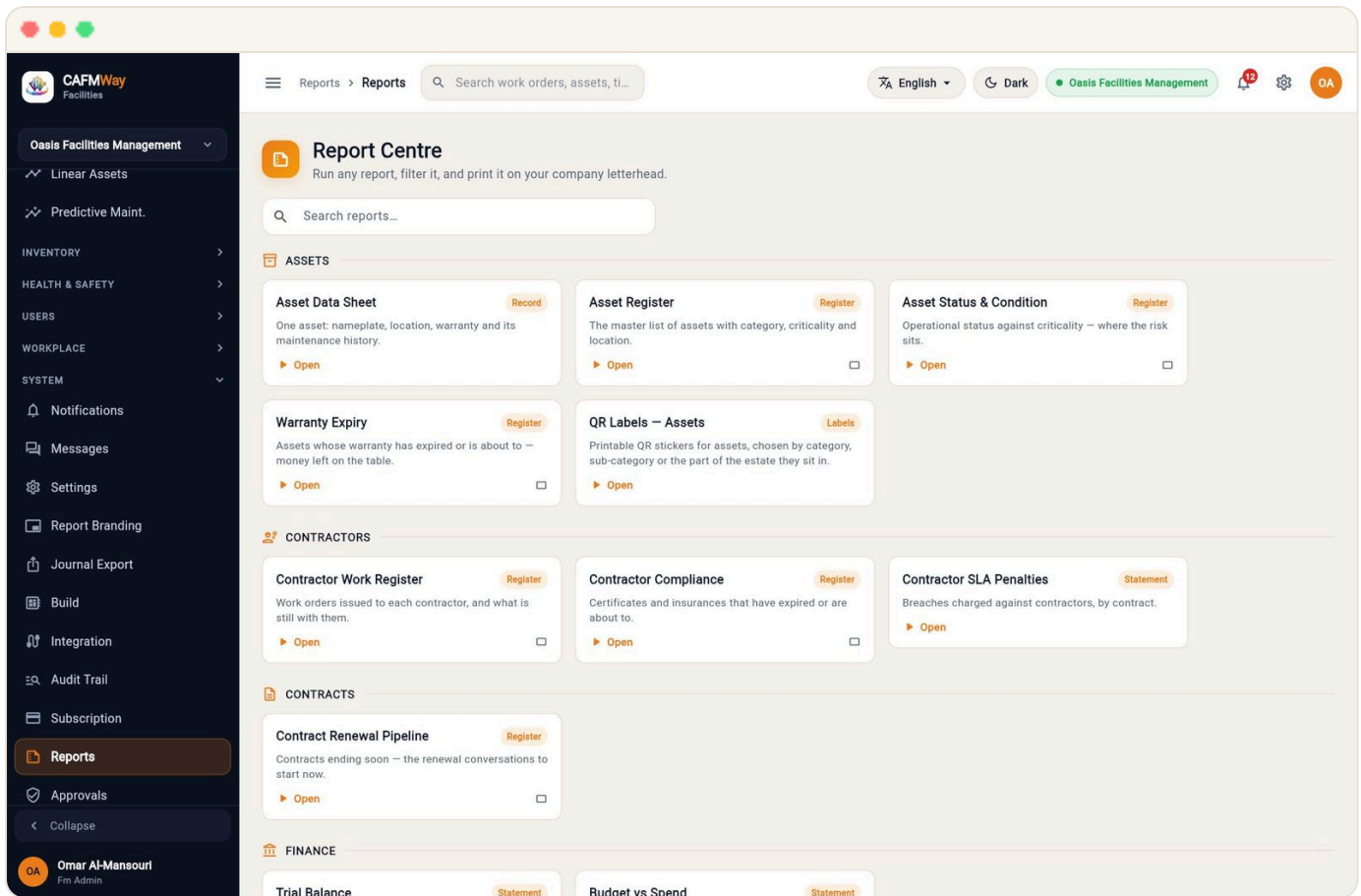


Figure 290 The Report Centre with the asset, contractor and contract reports.

Print the permit for the work site

- 1 Type in **Search reports...** to narrow the list, for example `permit`.
- 2 Click **Open** on **Permit to Work**. The report opens full screen.
- 3 Choose the **Permit** from the list, for example `PTW-2026-0006`, and click **Run**.
- 4 Choose the print language with **EN** or **AR** at the top.
- 5 Click **Preview** to see the printed page, with your company name and header from Report Branding, the scope of work and the signature blocks for the requester, approver and the person who closes the permit.
- 6 Click **Print** (or the printer icon at the bottom of the preview) to print or save the page as PDF.

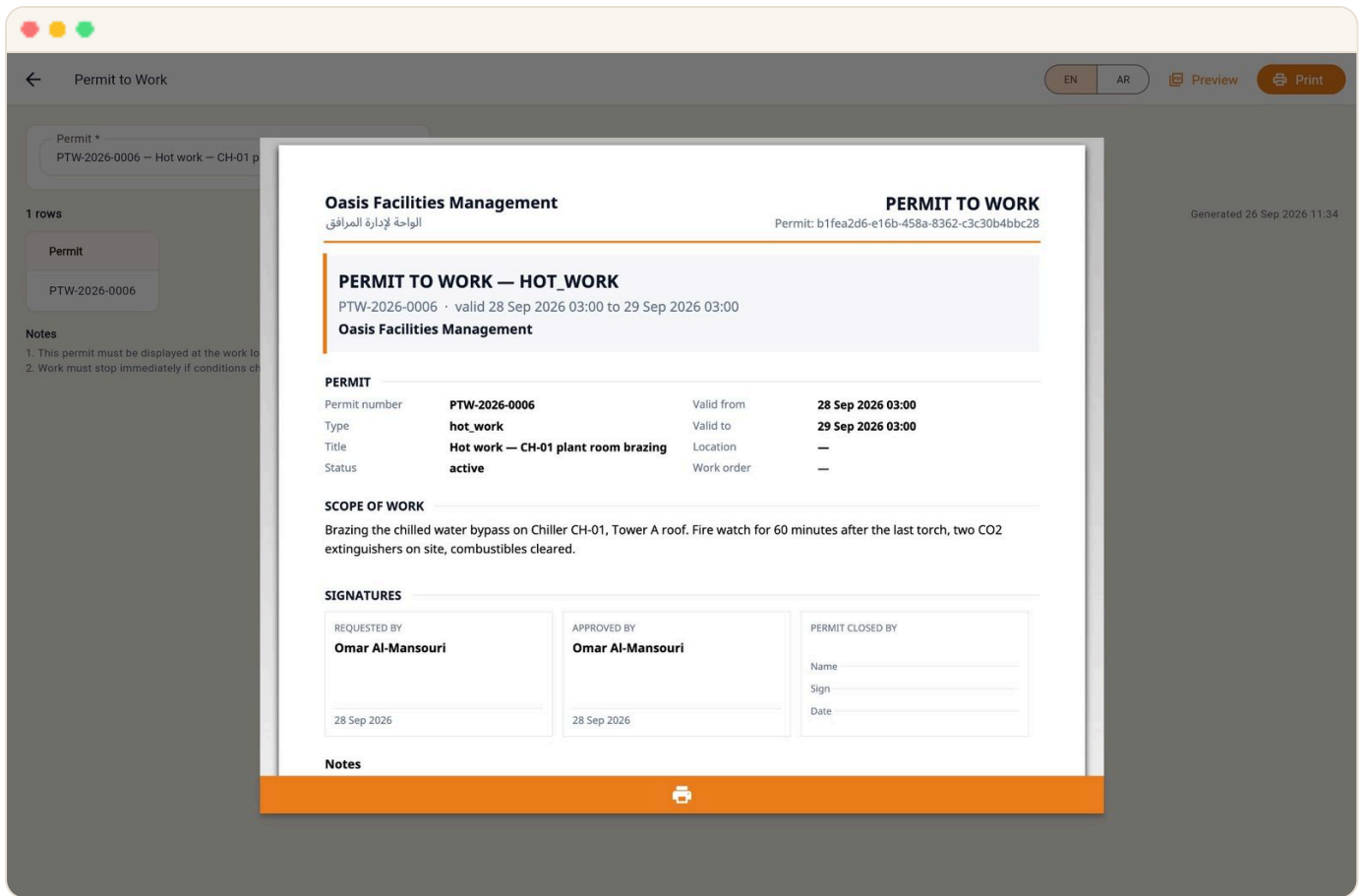


Figure 291 The printed permit to work for PTW-2026-0006 with the scope of work and signature blocks.

Run a register

Register reports list records and can have filters (dates, location, status) above the **Run** button. The result shows the row count, the grouping, and the time it was generated, followed by notes that explain the figures.

← Safety Training & Certification

EN AR Preview Print

Run

2 rows 2 groups Generated 26 Sep 2026 11:37

Employee	Course	Provider	Completed	Expires	Days left
Khalid Al-Kuwari	Hot Work Safety & Fire Watch	Doha Safety Training Centre	15 Sep 2026	15 Sep 2027	354
فيصل الهاجري	العمل على المرتفعات والحماية من السقوط	مركز الدوحة للتدريب على السلامة	—	—	—

Notes

1. A blank expiry means the certificate does not lapse.

Figure 292 The Safety Training & Certification register showing each person's course and days left on the certificate.

Click the arrow at the top left to go back to the Report Centre.

Brand your reports

Who: FM Administrator (settings module)

Where: Sidebar → SYSTEM → **Report Branding**

Report Branding sets what every printed report carries: your company name in English and Arabic, your legal name and commercial registration number, your logo, and the page settings. The **Live preview** on the right redraws a sample report as you change things. Choose a template (**Register, Record, Executive, Statement, Labels, Calendar**) and a language (**EN** or **AR**) to preview it.

- 1 On the **Identity** tab, check **Company name (English)**. It is printed in the header of every report.
- 2 Enter **Company name (Arabic)**, for example **الوحدة لإدارة المرافق**. It is used on Arabic reports.
- 3 Enter the **Legal name** and **CR number**. They are printed in the footer.
- 4 Click **Save**. The preview shows the new names.

The screenshot shows the CAFMWay web application interface. On the left is a dark sidebar with navigation options: Shifts, Roster, Leave Management, Roles & Permissions, Organisation & SLA, WORKPLACE (Space Booking, Waste Management, Documents), and SYSTEM (Notifications, Messages, Settings, **Report Branding**, Journal Export, Build, Integration). The main content area is titled 'Report Branding' and includes a search bar and a description: 'Your logo, name and page furniture on every printed report.' Below this is a note: 'Your company name and logo appear on every report. Custom colours, letterhead mode, footer text and signature blocks are part of the custom-branding module.'

The 'Identity' tab is active, showing fields for: Company name (English) [Oasis Facilities Management], Company name (Arabic) [الوحدة لإدارة المرافق], Legal name [Oasis Facilities Management], and CR number [184522]. A 'Save' button is at the bottom right of this section.

To the right is a 'Live preview' section with tabs for Register, Record, Executive, Statement, Labels, and Calendar. The 'Register' tab is selected, and the language is set to 'AR'. The preview shows a sample report titled 'التزام أواخر العمل بالتقافية مستوى الخدمة' (Service Level Commitment End of Work) for 'الوحدة لإدارة المرافق' (Facilities Management Unit). The report includes a table with columns: WOI, Description, Priority, Raised, Response time, and SLA. It shows data for 'LUSAIL TOWER A' and 'MSHEER PLAZA'. The footer of the preview includes 'Generated: 2024/08/26 14:20', 'By: Admin', 'Page 1 of 2', and 'Powered by CAFMWay'.

Figure 293 The Identity tab with the company's English and Arabic names and the Arabic preview.

1 On the **Page** tab, choose the **Paper size** and click **Save**.

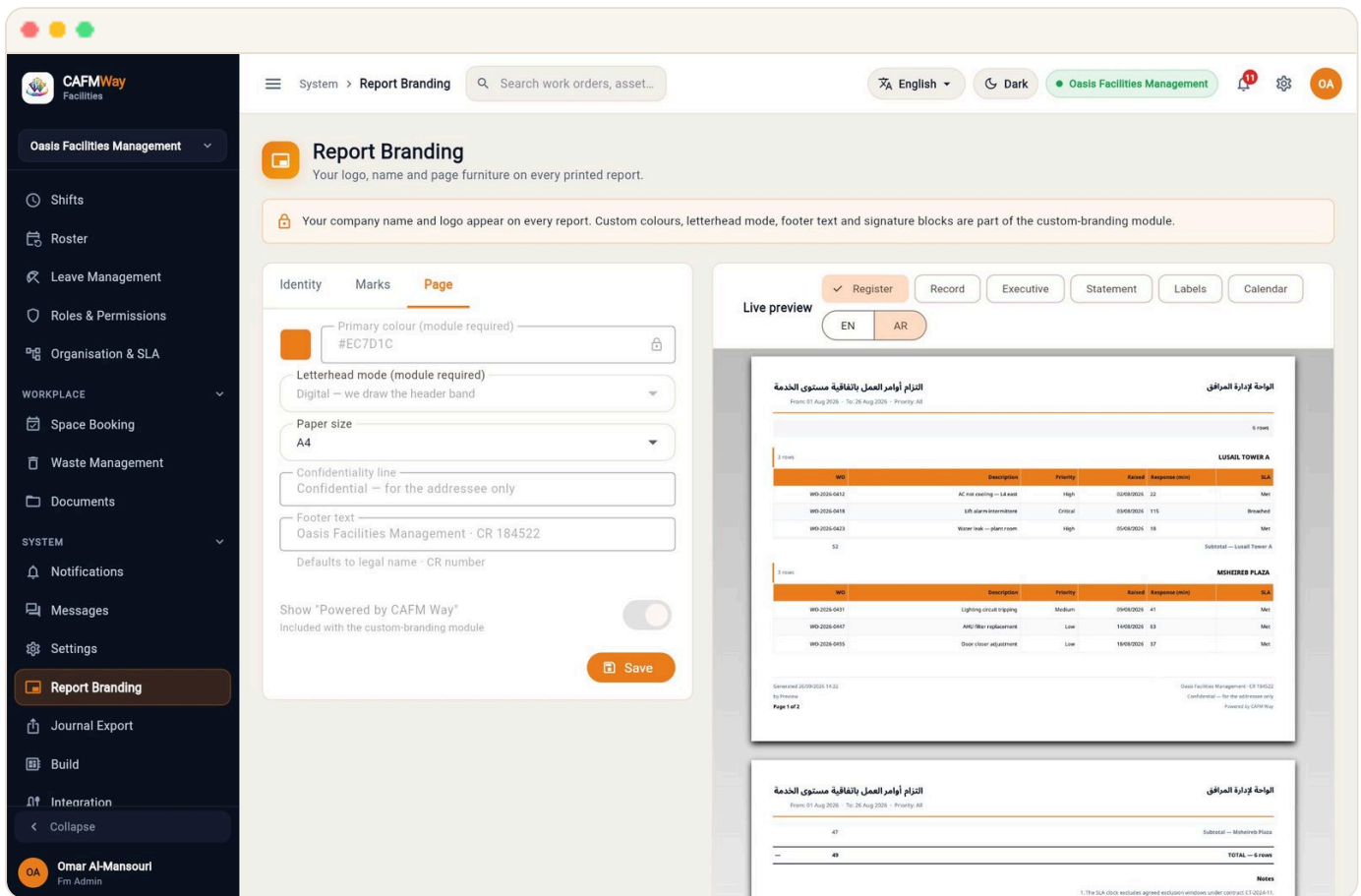


Figure 294 The Page tab: paper size is editable; colour, letterhead mode and footer text need the custom-branding module.

NOTE

Uploading a logo on the **Marks** tab is not working yet: the upload is refused. Company stamp, authorised signature, primary colour, letterhead mode, confidentiality line, footer text and the "Powered by CAFM Way" line are part of the custom-branding module and are locked without it.

Settings, custom fields and audit

System settings

Who: FM Administrator

Where: Sidebar → SYSTEM → **Settings**, or the gear icon in the top bar

System Administration gathers the company-wide settings and points to where the rest are kept.

Tab	What it holds
General	Company Profile (company name and plan), System Preferences (Dark Mode) , and Configured elsewhere , which tells you where priorities and SLA targets, depreciation methods, logo and report headers, and language are set.
Notifications	Where your notifications appear (the bell and the Notifications page; push notifications on phones once signed in to the mobile app).
Integrations	Links to Integration (ERP connectors) and Journal Export .
Security	Active Sessions : each signed-in browser or device with its IP address and last-seen date, with Revoke to sign it out. Who did what links to the audit trail and to users and roles.
Billing	Your plan; seats, invoices and payments are on the Subscription page.
Approvals	Which documents need approval before they take effect (see the approvals part of this guide).

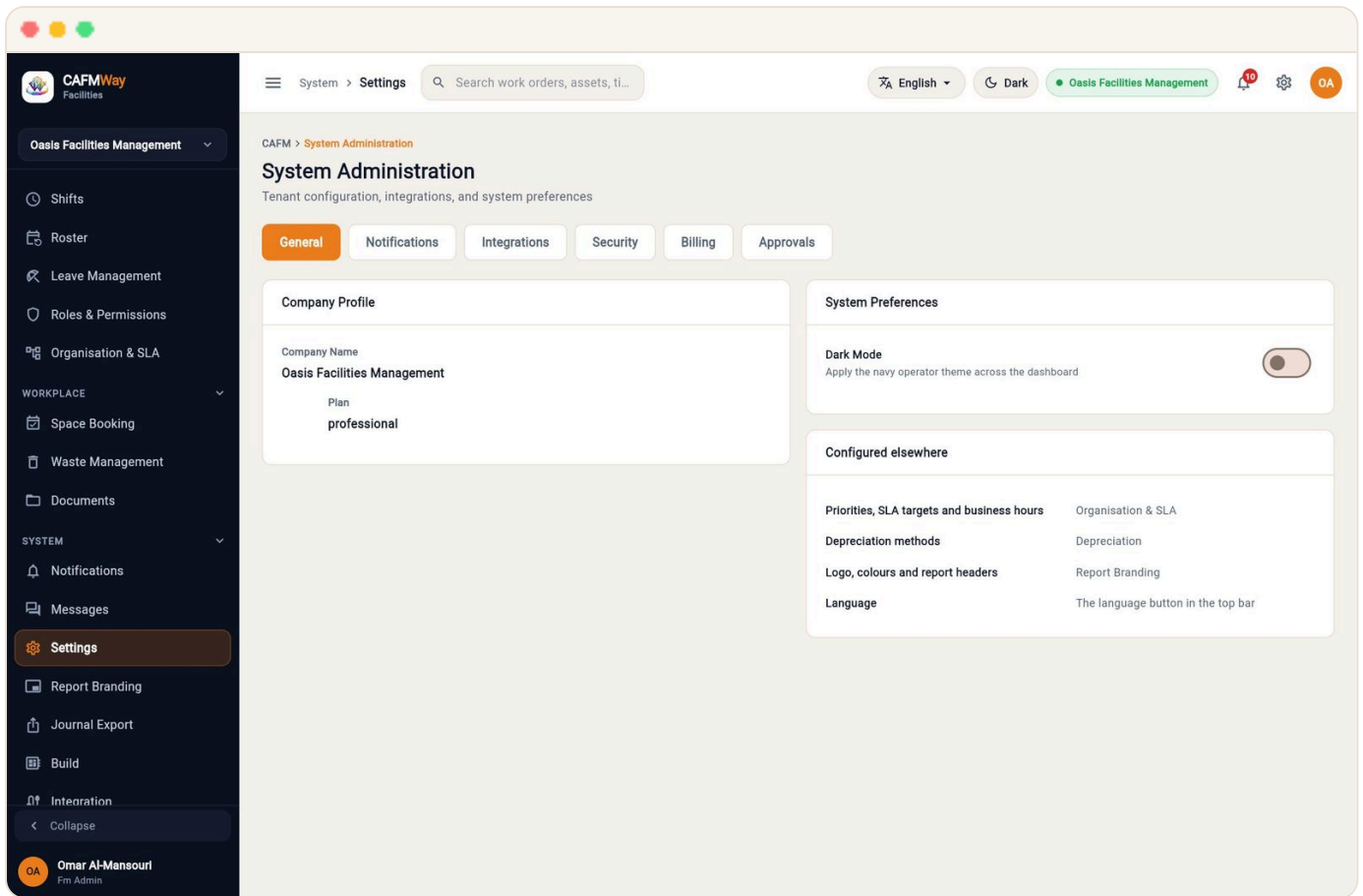


Figure 295 Settings, General tab: company profile, dark mode, and where other settings live.

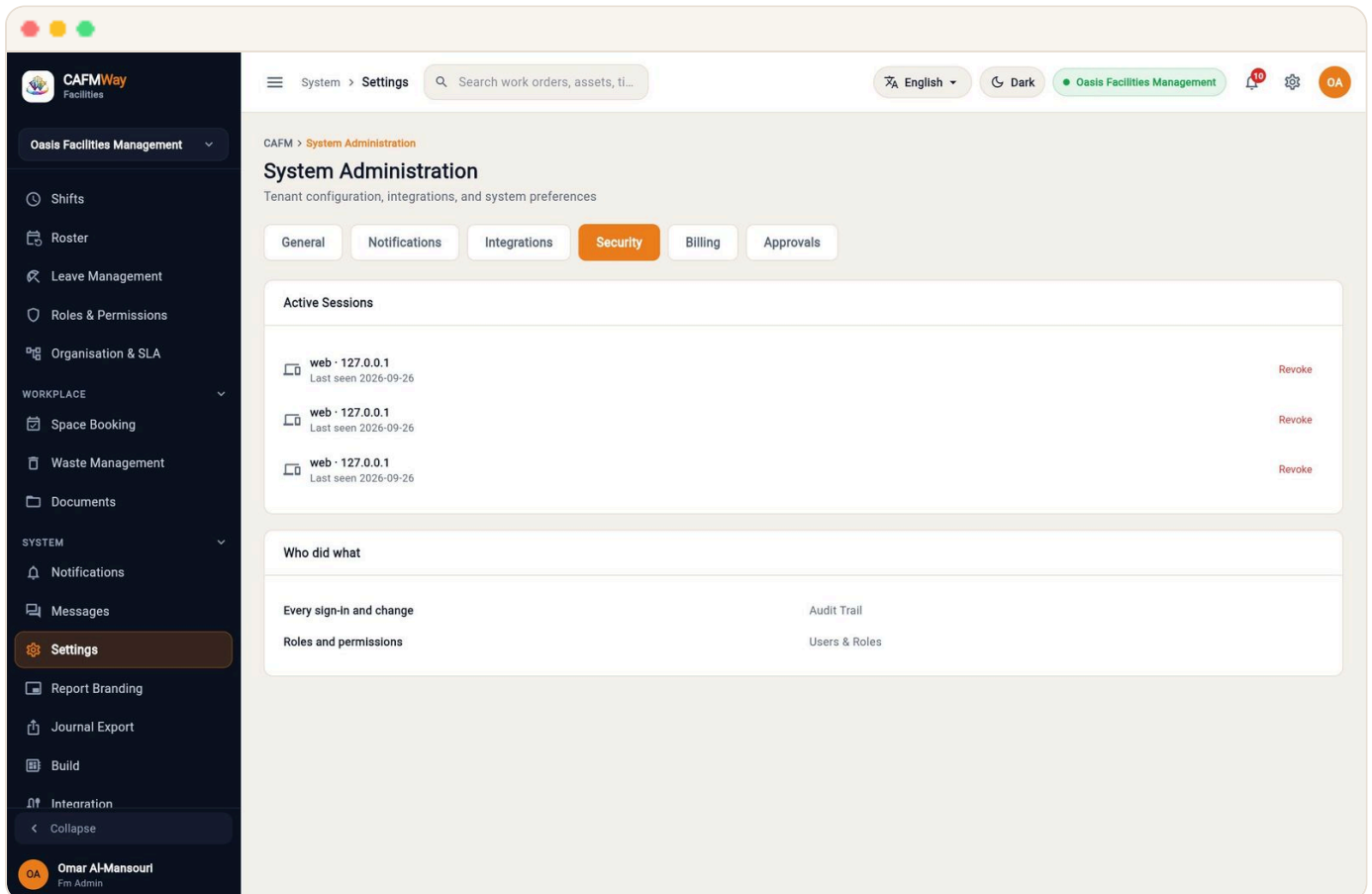


Figure 296 Settings, Security tab: active sessions with a Revoke button on each.

CAUTION

Revoke signs that session out immediately. Check the device and IP address before you use it.

Add your own fields (Build)

Who: FM Administrator (settings module)

Where: Sidebar → SYSTEM → **Build**

Build lets you add your company's own fields to the standard forms, for example the refrigerant type of a chiller. The fields belong to your company only and appear on its forms in the dashboard and in both mobile apps.

- 1 Open **Build**. The tiles show how many forms you have extended, how many custom fields exist, and how many forms are available. Search for a form with **Search a form or module**, or tick **Only forms I have extended**.
- 2 Click the form, for example **Asset**.
- 3 Click **Add field**.
- 4 Enter the **Label** people will read, for example `Refrigerant type`. The **Stored name** fills in from the label (lower case, digits and underscores); it cannot be changed later.
- 5 Choose the **Type**: Yes / No, Amount, Short text, Date, Date & time, Decimal, Whole number, Percentage, Choice list or Long text.
- 6 For a **Choice list**, type the **Choices**, one per line, at least two.
- 7 Optionally group fields under a **Section**, set the **Order**, and add a **Placeholder** or **Hint text**.
- 8 Turn on **Required** if the record cannot be saved without the field, or **Read-only** if people may see but not type into it. **Shown on the form** is on by default.
- 9 Click **Add field**.

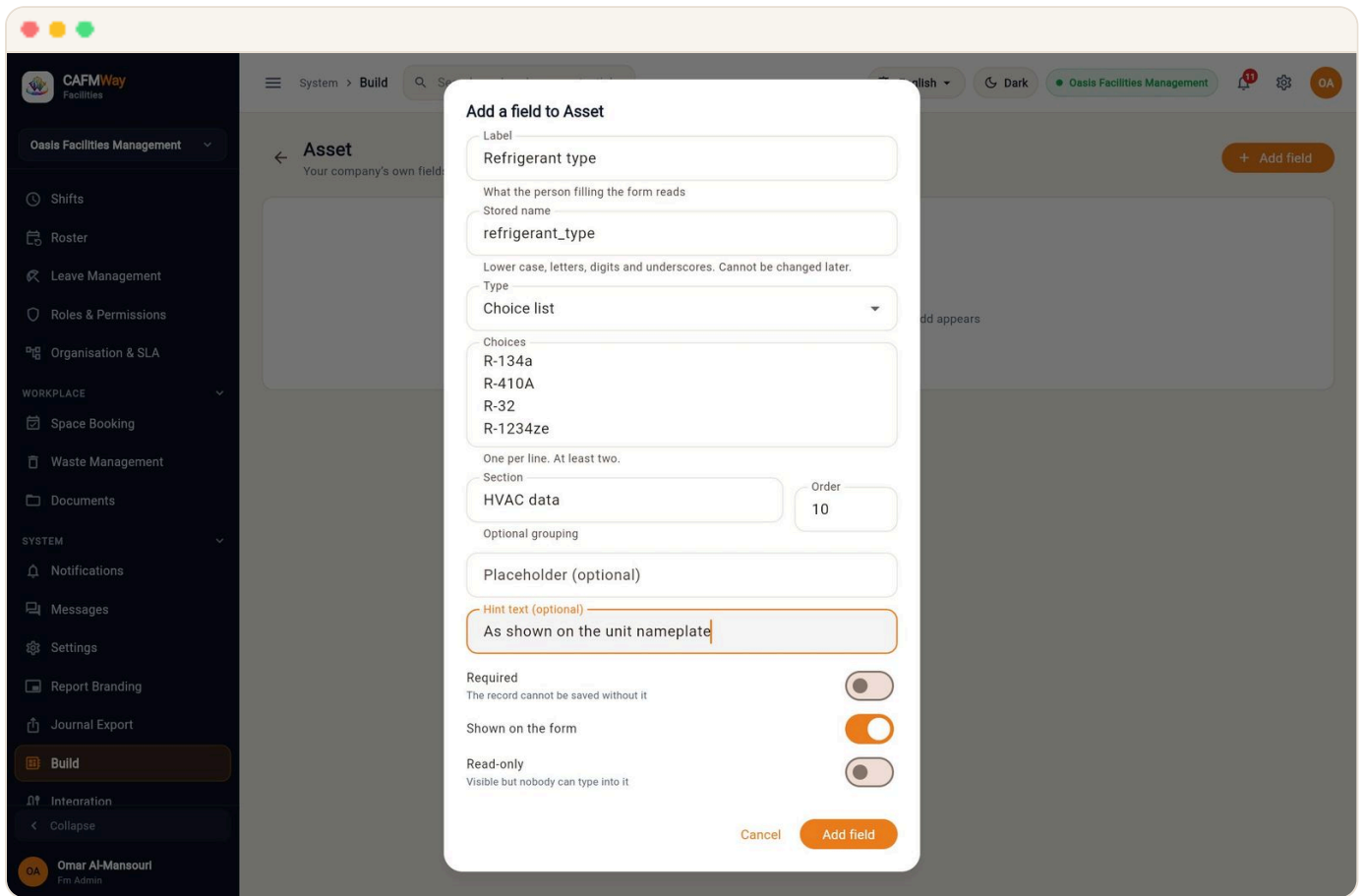


Figure 297 Adding a Refrigerant type choice list to the Asset form.

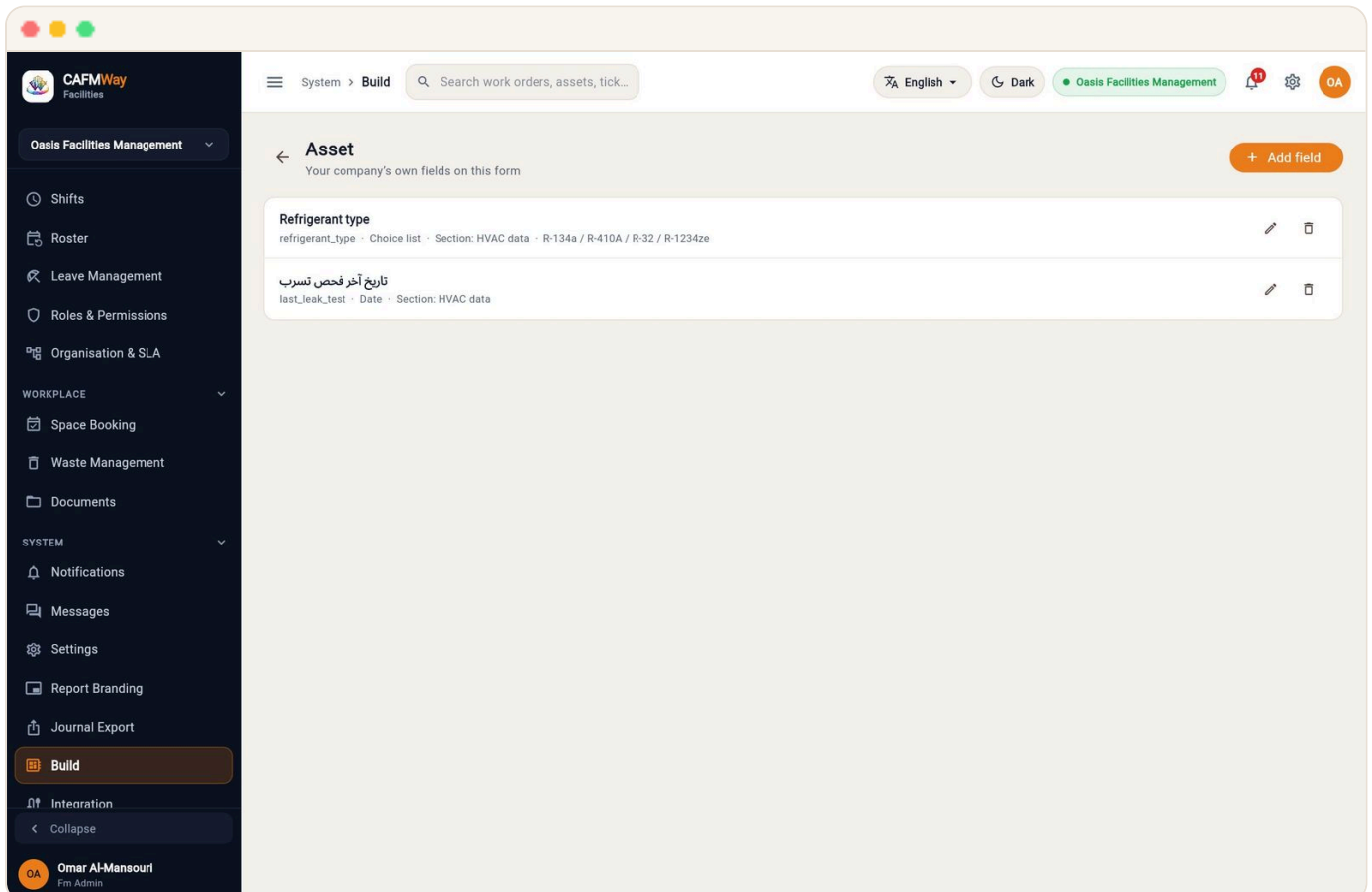


Figure 298 The Asset form's custom fields: refrigerant type and last leak test date.

The new fields appear on the asset's **Overview** tab under **Additional fields**. Fill them in and click **Save**.

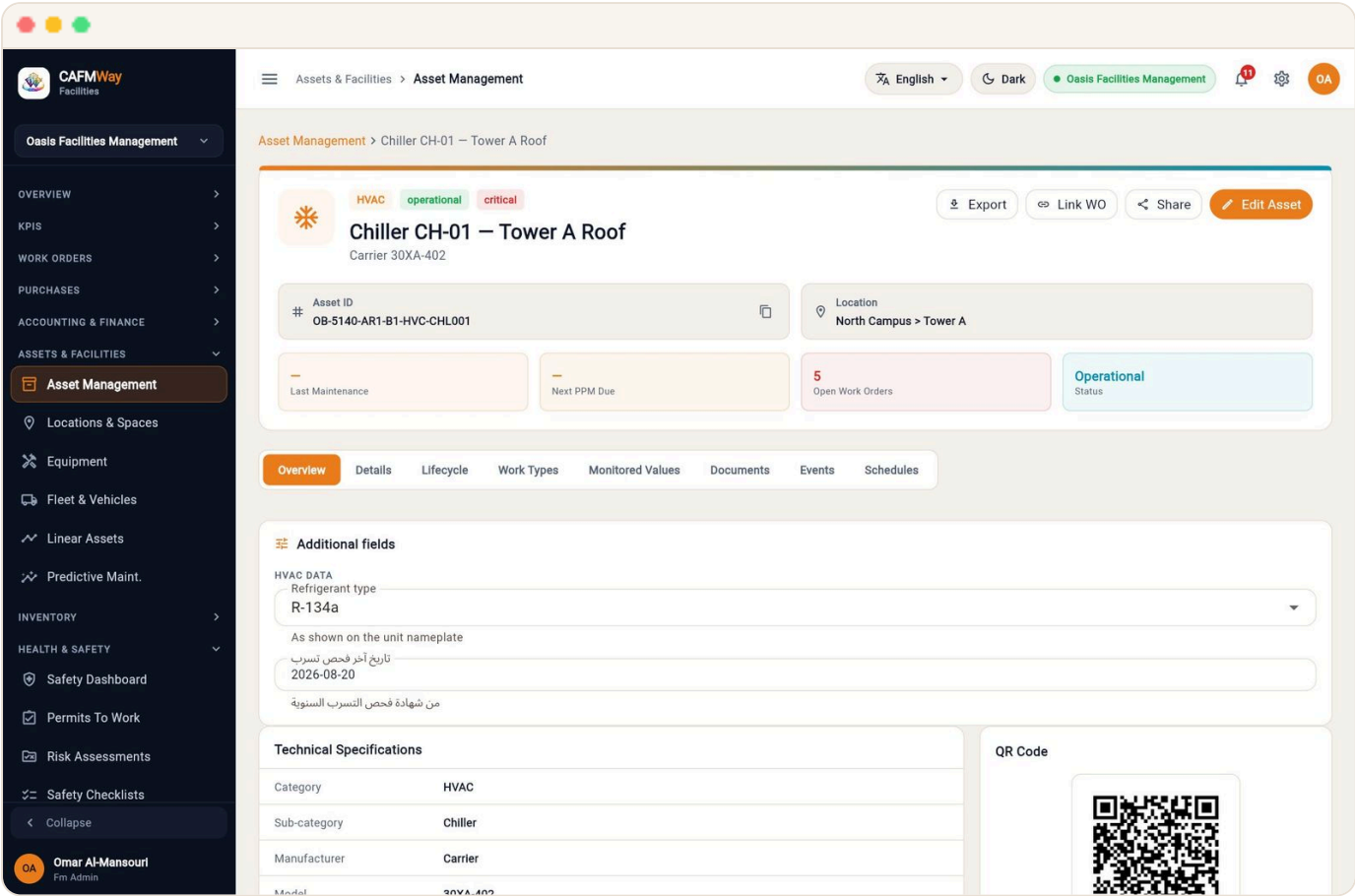


Figure 299 Chiller CH-01 with its refrigerant type and last leak test date filled in.

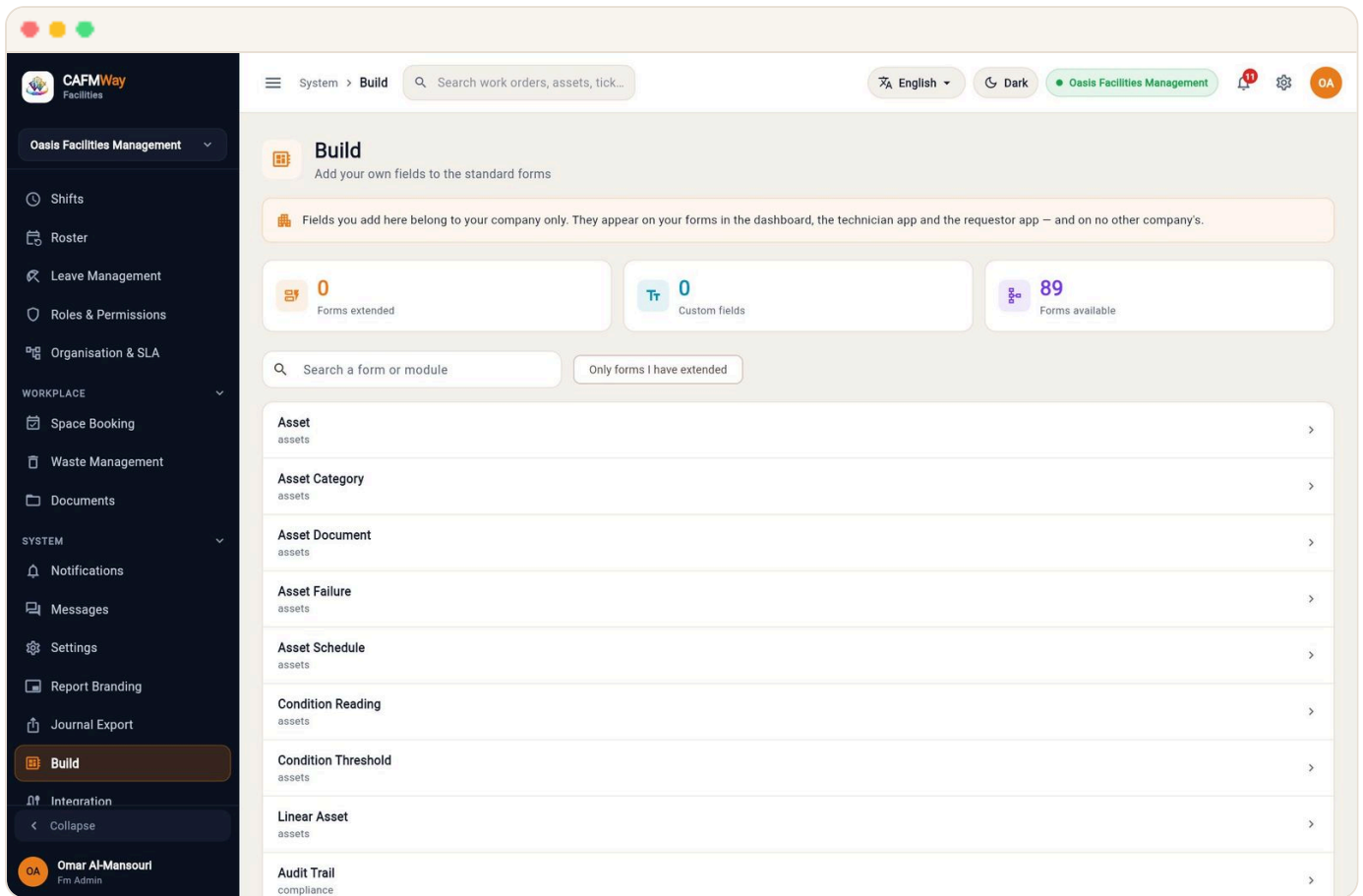


Figure 300 The Build screen listing the forms that can take custom fields.

NOTE

Custom fields are shown on asset and work order details. A field has one label, shown the same in both languages, so choose wording that suits both teams.

Audit trail

Who: FM Administrator, auditor (compliance module)

Where: Sidebar → SYSTEM → **Audit Trail**

The audit trail records who did what and when: record changes, status changes, sign-ins and profile updates. Records in the audit trail cannot be changed.

- 1 Open **Audit Trail**. The tiles show **Total Events Today**, **Approvals**, **Deletions** and **Failed Logins**.
- 2 Pick the day with the date button.
- 3 Narrow the list with **Search user, action, module...** and the **All Modules**, **All Users** and **All Actions** filters. **Clear** removes the filters.
- 4 Click a row to see the event: who, when, the IP address, the module and the full description.

The screenshot displays the CAFMWay Audit Trail interface. The left sidebar shows the navigation menu with 'SYSTEM' expanded and 'Audit Trail' selected. The main content area shows the 'Audit Trail' title and a subtitle 'Complete system activity log — every action, every user, every change'. Below this are four summary tiles: '50 Total Events Today', '0 Approvals', '0 Deletions', and '0 Failed Logins'. A table of activity logs follows, with columns for Time, User, Action / Detail, Module, and IP Address. The table lists various actions performed by Omar Al-Mansouri, including profile updates, status changes, and service request updates.

Time	User	Action / Detail	Module	IP Address
11:28:55	Omar Al-Mansouri	update User Omar Al-Mansouri updated by Omar Al-Mansouri	User	127.0.0.1
11:28:55	Omar Al-Mansouri	user_updated Omar Al-Mansouri Updated Own Profile	System	127.0.0.1
11:28:50	Omar Al-Mansouri	update User Omar Al-Mansouri updated by Omar Al-Mansouri	User	127.0.0.1
11:28:50	Omar Al-Mansouri	user_updated Omar Al-Mansouri Updated Own Profile	System	127.0.0.1
11:28:44	Omar Al-Mansouri	update User Omar Al-Mansouri updated by Omar Al-Mansouri	User	127.0.0.1
11:28:44	Omar Al-Mansouri	user_updated Omar Al-Mansouri Updated Own Profile	System	127.0.0.1
11:28:35	Omar Al-Mansouri	update Service Request SR-2026-0002 updated by Omar Al-Mansouri	Service Request	127.0.0.1
11:28:35	Omar Al-Mansouri	status_changed Status changed to completed	Service Requests	127.0.0.1
11:28:14	Omar Al-Mansouri	update User Omar Al-Mansouri updated by Omar Al-Mansouri	User	127.0.0.1
11:28:14	Omar Al-Mansouri	user_updated Omar Al-Mansouri Updated Own Profile	System	127.0.0.1
11:28:06	Omar Al-Mansouri	update User Omar Al-Mansouri updated by Omar Al-Mansouri	User	127.0.0.1

Figure 301 The audit trail for today, newest events first.

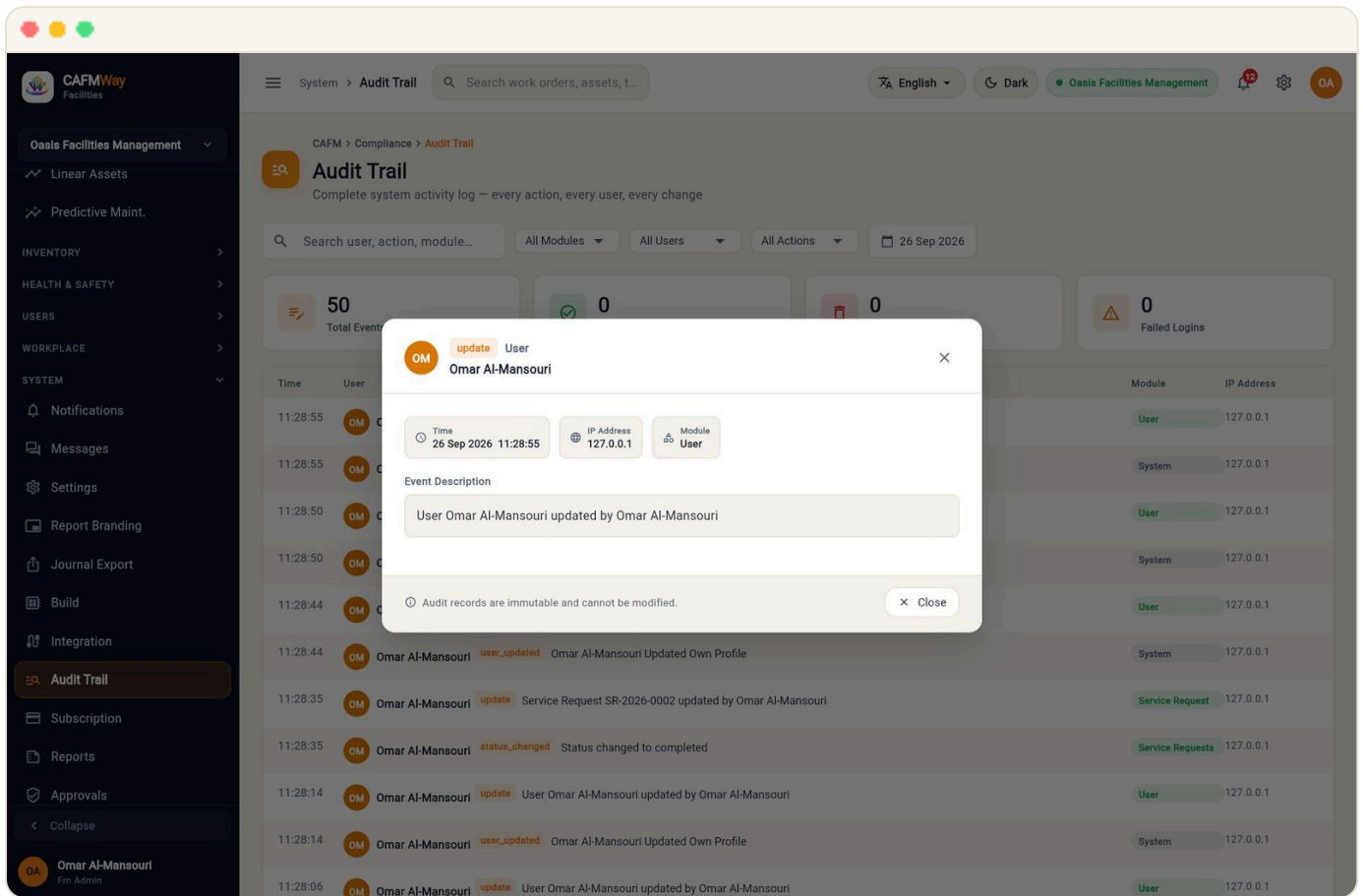


Figure 302 One audit event opened, showing the time, IP address, module and description.

NOTE

Search and the filters work on the latest events loaded for the day. For a full history over a period, run the **Audit Trail by User** or **Audit Trail by Module** report in the Report Centre.

Subscription

Your company's subscription sets how many people can sign in and how many areas, buildings and open spaces you can manage. You can see it and ask CAFM for more at any time.

Your subscription

Who: FM administrators

Where: SYSTEM → **Subscription**

The **Overview** tab shows:

- the current plan, the annual amount, the next payment date and the status
- **User Seats:** seats used out of seats paid for, and who is using them by role. Contractor responsible persons use seats too.
- **Facilities:** buildings and open spaces used out of those allowed

A **Finish setting up your workspace** banner lists anything left from the first-time setup. **Continue setup** opens the setup wizard.

The screenshot displays the 'Subscription' overview page in the CAFM Way web application. The left sidebar contains navigation links for 'Oasis Facilities Management' (Roster, Leave Management, Roles & Permissions, Organisation & SLA) and 'WORKPLACE' (Notifications, Messages, Settings, Report Branding, Journal Export, Build, Integration, Audit Trail). The 'Subscription' link is highlighted. The main content area shows the 'Tenant & Subscription' details for 'Oasis Facilities Management'. It includes a 'Manage Billing' button and tabs for 'Overview' and 'Requests'. A banner at the top indicates 'Finish setting up your workspace' with a 'Continue setup' button. Below this, the 'CURRENT PLAN' is shown as 'Professional' for 'USD 1,100 /yr', with 'Next payment Sep 26, 2027' and an 'Active' status. Usage statistics are listed: 14/25 Active Users, 15.3 MB Storage Used, and 0 API Calls. A progress bar shows the 'Upgrade in progress' status for '1 user', with steps: Submitted (checked), Reviewed, Offer sent, and Paid & activated. A green notification bar at the bottom states 'SUB-2026-0008 - offer sent. Check your email for the payment offer.' The bottom right section shows 'Facilities' usage: Buildings at 100% and Spaces at 100%.

Figure 303 The subscription overview

Request more user seats

- 1 Click **Request more user seats**.
- 2 Enter how many more people need to sign in, and optionally a note for the CAFM team.
- 3 Click **Send request**.

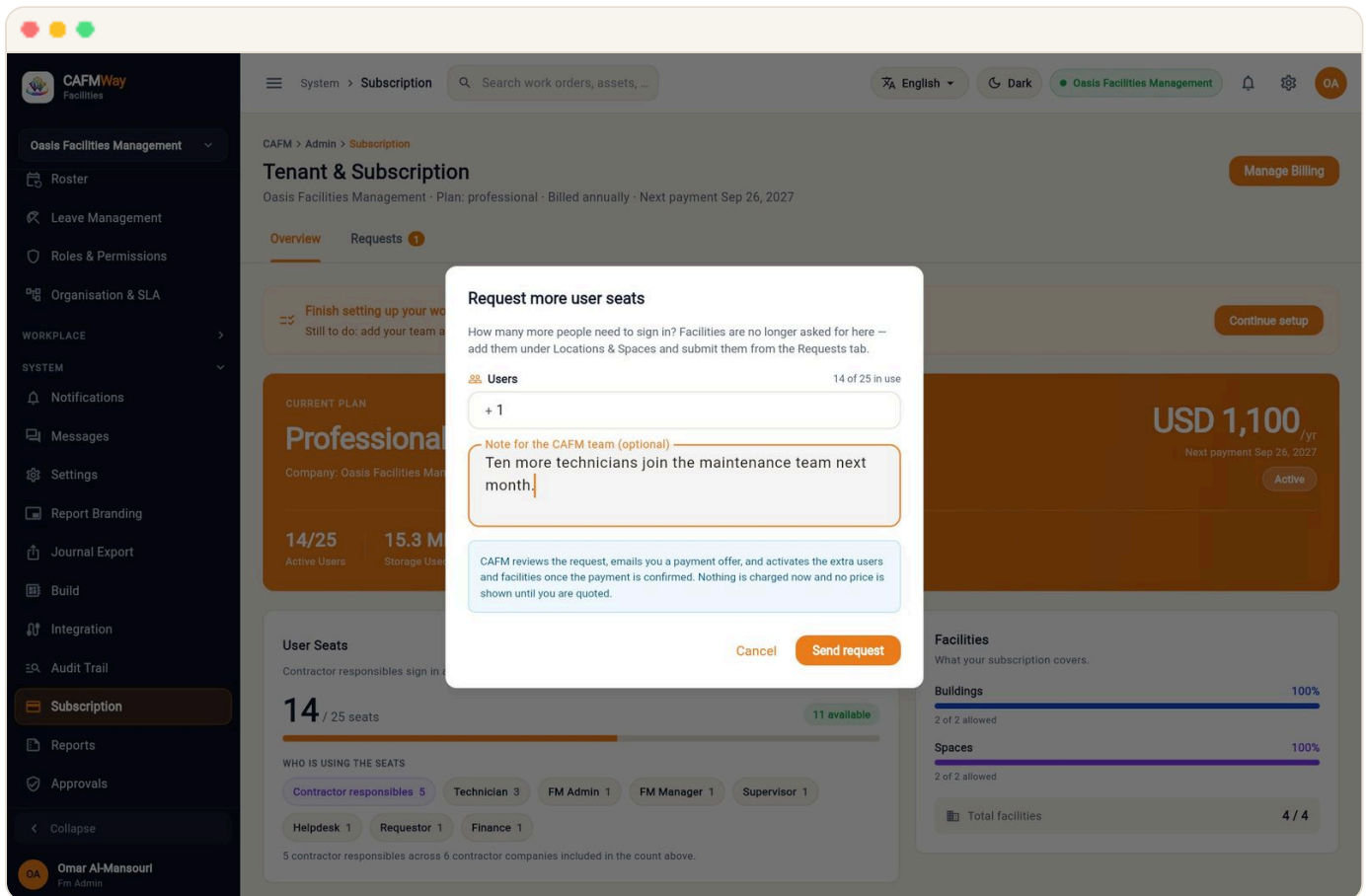


Figure 304 Asking for 10 more seats

CAFM reviews the request, emails you a payment offer, and raises your seat limit once the payment is confirmed. The button shows **Request pending** meanwhile.

BUSINESS RULE

Only one request for additional users can be open at a time.

Request more facilities

When you add an area, building or space beyond your limit (see Beyond your subscription), it waits on the **Requests** tab until you send it.

- 1

Open the **Requests** tab. Facilities not yet sent are listed. The small bin removes one you added by mistake.
- 2

Click **Submit request**, add an optional note, and click **Send request**.

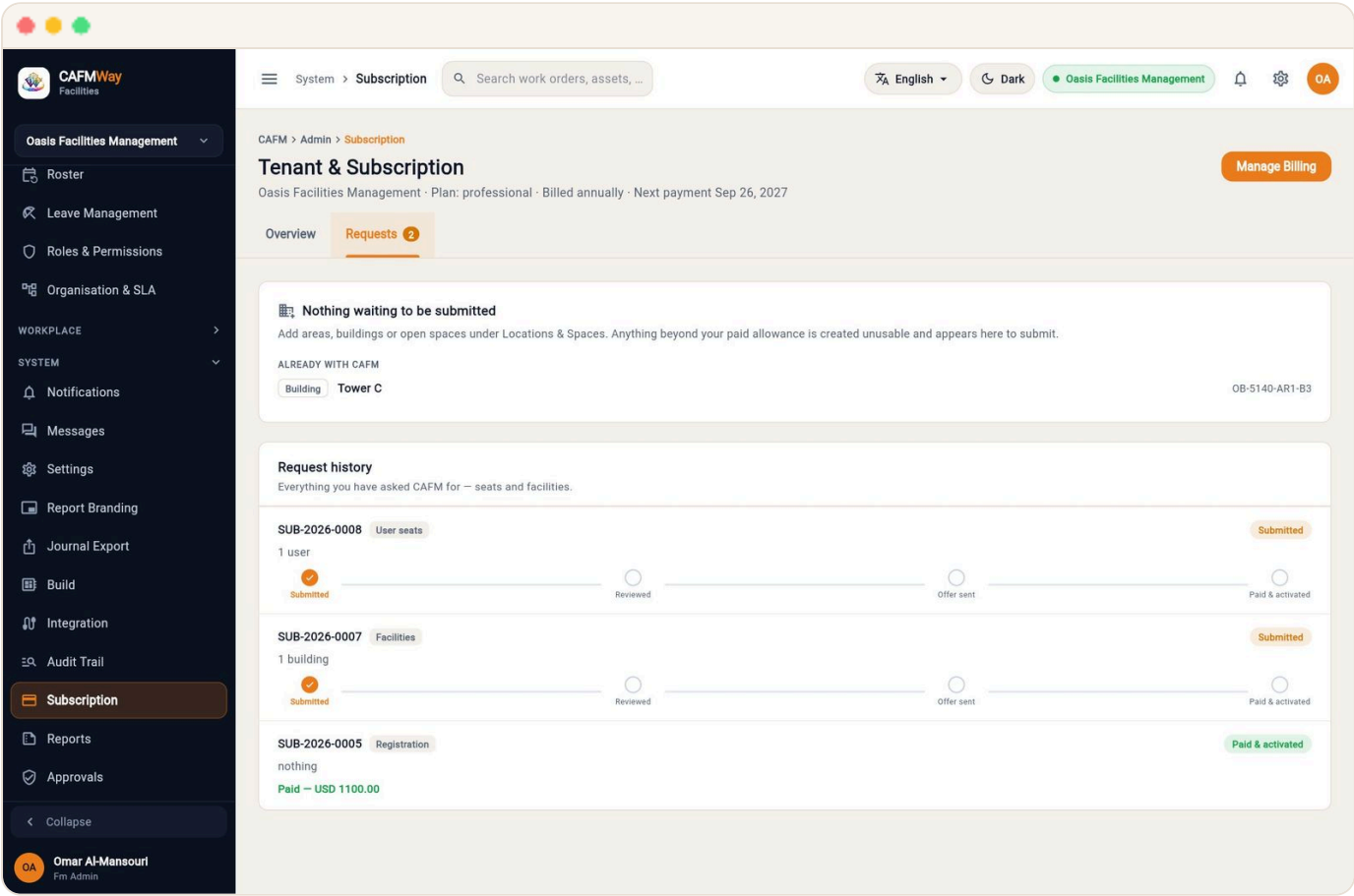


Figure 305 Facilities waiting to be sent to CAFM

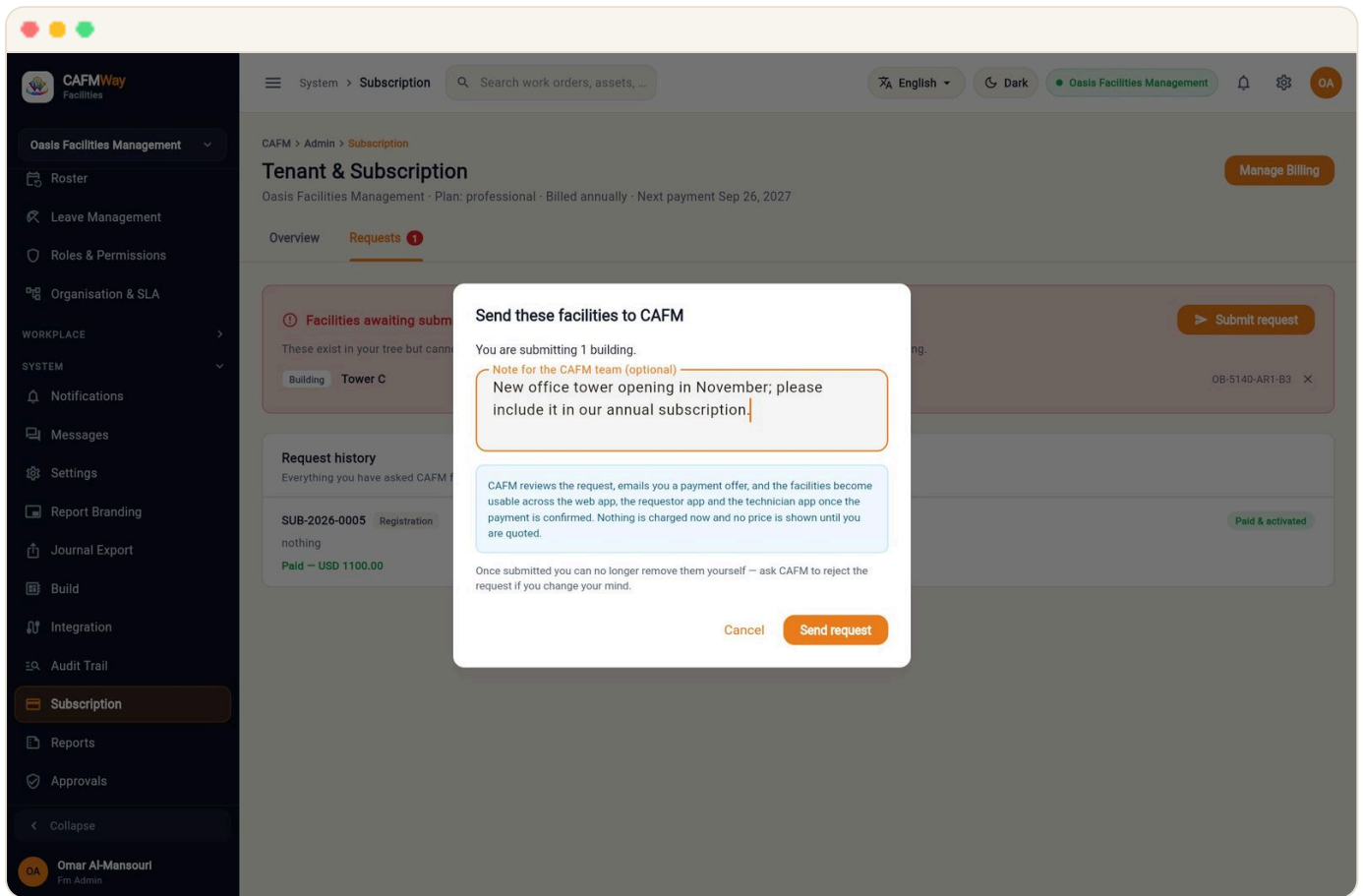


Figure 306 Sending Tower C for pricing

CAFM prices the request and emails a payment offer. After the payment is confirmed, the new facilities become usable across CAFM Way and an invoice is issued. If CAFM declines, the facilities come back to you as drafts.