BEACON HELP · GUIDE

Maintenance

Logging, triaging, pricing, scheduling and completing jobs



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FOR
Maintenance managers, area support managers and nursery managers

ONLINE
help.beacon.earlytree.co.uk

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Screenshots show a fictional nursery group and people.

Contents

Maintenance: logging, triaging, pricing, scheduling and completing jobs. These steps match Beacon 2026.11; for another version, see help.beacon.earlytree.co.uk. Beacon runs at your organisation's own address.

About maintenance 6

- Where jobs come from 6
- Statuses 7
- RAG colours 7
- Who can do what 7
- Guides in this area 8

Maintenance: the maintenance board 9

- Purpose 9
- Before you start 9
- Open the board 9
- Read a card 11
- Open a job 12
- Common problems 12
- Related guides 12

Maintenance: logging a maintenance job 13

- Purpose 13
- Before you start 13
- Log a job 13
- If the job needs a contractor 14
- Common problems 15
- Related guides 16

Maintenance: moving a job through its statuses 17

- Purpose 17
- Before you start 17
- Triage new jobs 17
- Move a job 17
- Common problems 18
- Related guides 19

Maintenance: a job's page, details, owner and comments 20
Purpose 20
Before you start 20
Open a job 20
Change a job's details 21
Add a comment 22
Where a job came from 23
Common problems 23
Related guides 24

Maintenance: priority and RAG status 25
Purpose 25
Before you start 25
Priority 25
How Beacon works out the RAG colour 25
Override the colour 26
Common problems 27
Related guides 28

Maintenance: scheduling a job 29
Purpose 29
Before you start 29
Set the dates 29
Move a job's dates on the Calendar 31
Common problems 31
Related guides 31

Maintenance: quotes and cost estimates 32
Purpose 32
Before you start 32
Estimate the cost with a cost model 32
Record a quote 33
Accept or reject a quote 34
Record the actual cost 34
Common problems 34
Related guides 35

Maintenance: contractors 36
Purpose 36
Before you start 36
See the contractor list 36
Add a contractor 37
Update a contractor or mark them inactive 38
Common problems 39
Related guides 39

Maintenance: merging duplicate jobs 41
Purpose 41
Before you start 41
Merge a duplicate into this job 41
Undo a merge 42
Common problems 42
Related guides 43

Maintenance: checking and completing a job 44
Purpose 44
Before you start 44
Check the work 44
Sign it off 44
Reopen a job 45
Common problems 45
Related guides 46

Maintenance: the maintenance RAG report 47
Purpose 47
Before you start 47
Open and read the report 47
Common problems 48
Related guides 48

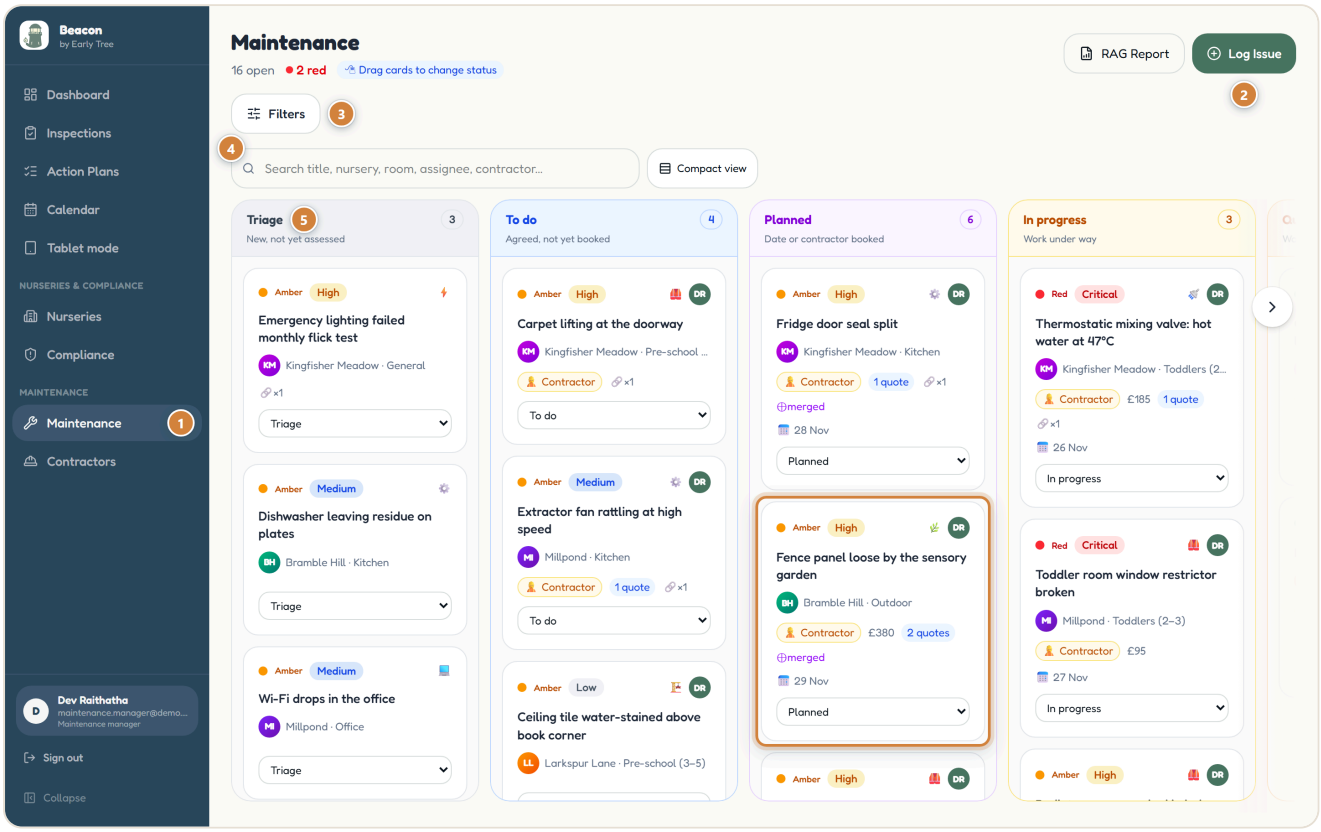
Reading the screenshots. The orange numbers 1 on a picture match the numbers in the step text, and an orange box marks the part of the screen a step is about. Every guide is also online, with search, at

help.beacon.earlytree.co.uk.

MAINTENANCE

About maintenance

Beacon's maintenance area is where every repair and job across your nurseries is reported, sorted, priced, booked and signed off. Each job is a **ticket** on the maintenance board, and moves from left to right as the work gets done.



The maintenance board. Each card is one job.

Where jobs come from

- **Logged by hand.** Anyone who can log maintenance selects **Log Issue** on the board. See Logging a maintenance job.
- **From an inspection.** When an inspector submits an inspection, every maintenance note they recorded (on the desktop checklist, or with **Log maintenance** in the room summary in tablet mode) becomes a ticket in **Triage**, linked to the inspection. Its priority comes from the note's severity: Urgent becomes **Critical**, Required becomes **High**, anything else **Medium**. See Inspections.
- **From an action plan.** When a report is signed off, actions in the Maintenance category that are assigned to the maintenance manager get a ticket of their own. The action is then looked after here, and closes by itself when the ticket is completed. See Action plans.
- **From the compliance calendar.** If your organisation uses Nina, she raises a ticket when a statutory or planned check is coming due or is overdue. See Compliance and certificates.

Statuses

Status	What it means
Triage	New. Nobody has looked at it yet. Every new job starts here.
To do	Agreed. It needs doing but isn't booked.
Planned	A date or contractor is booked. Beacon needs a planned date before a job can move here.
In progress	Work is under way. Beacon needs an estimated start and end date before a job can move here.
Quality check	The work is done and being checked.
Completed	Checked and closed. Completed jobs are hidden from the board unless you tick **Show completed tickets** under **Filters**.

RAG colours

Every ticket has a red, amber or green (RAG) colour, so the jobs that need attention stand out. Beacon works it out for you; see Priority and RAG status.

Who can do what

What you can do in maintenance depends on your **maintenance access**, which is set separately from your inspection role when your area support manager gives you access (see Administration).

Maintenance access	What you can do
None	You don't see maintenance at all.
Read-only	See the board, tickets and the RAG report. Room leaders and auditors usually have this.
Contributor	Everything above, plus log new jobs. Nursery managers usually have this.
Manager (full)	Everything: move jobs between statuses, edit them, record and decide quotes, merge duplicates, comment, and keep the contractor list. Area support managers and maintenance managers always have this.

People who only look after one nursery see that nursery's jobs; people with group-wide access see every nursery, plus group-wide jobs that don't belong to one nursery.

The contractor list is kept by people with **Manager (full)** maintenance access. See Contractors.

Guides in this area

- The maintenance board
- Logging a maintenance job
- Moving a job through its statuses
- A job's page: details, owner and comments
- Priority and RAG status
- Scheduling a job
- Quotes and cost estimates
- Contractors
- Merging duplicate jobs
- Checking and completing a job
- The maintenance RAG report

MAINTENANCE

Maintenance: the maintenance board

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Maintenance manager Area support manager Nursery manager Everyone with maintenance access	**Maintenance**	A minute or two	Maintenance access: Read-only or above

Purpose

The board shows every open maintenance job you can see, in one column per status, so you can tell at a glance what is waiting to be looked at, what is booked, what is under way and what needs checking. It is where most maintenance work starts.

Before you start

- You have maintenance access. If **Maintenance** isn't in your menu, ask your area support manager.
- You only see the nurseries you look after. Group-wide users see every nursery and group-wide jobs.

Open the board

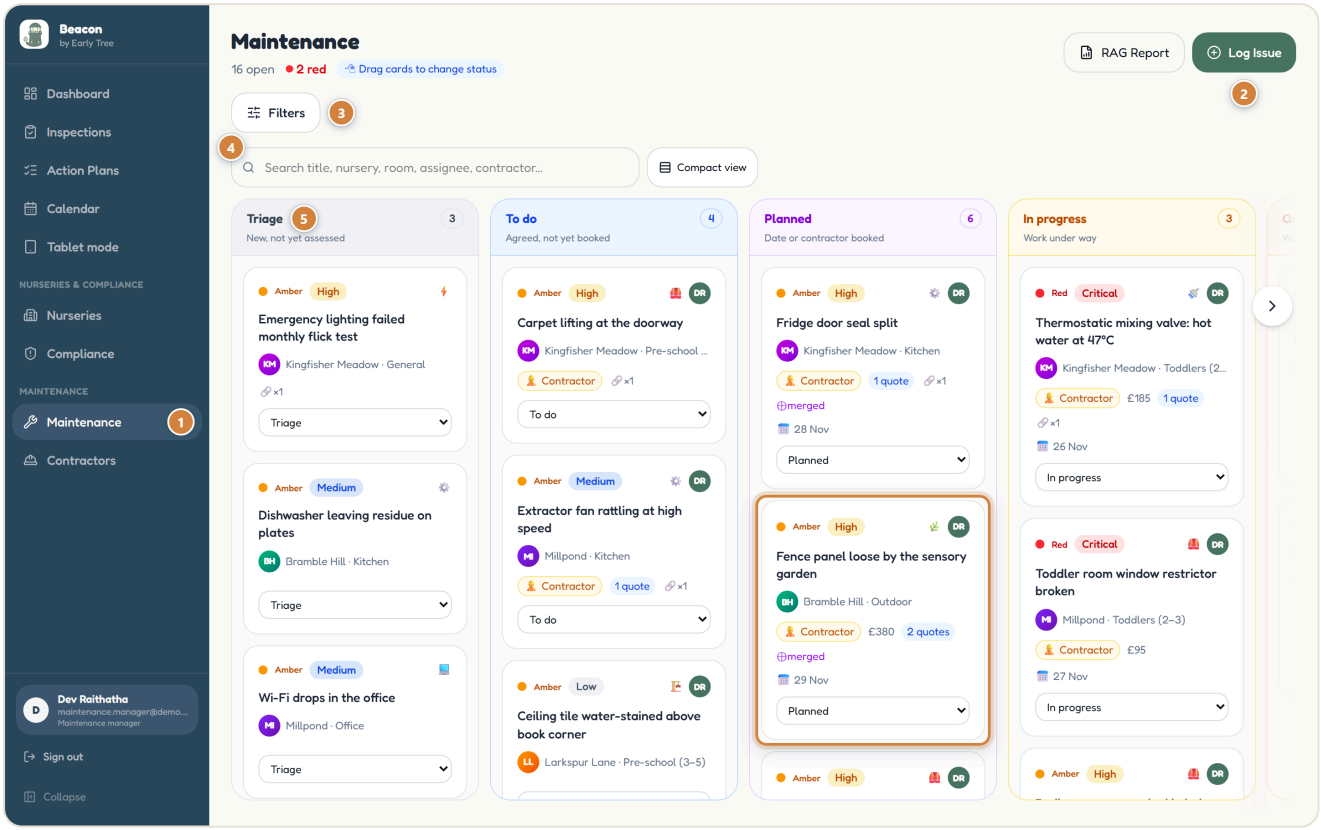
1. In the menu, select **Maintenance** 1. The board opens with every open job you can see.
2. Read the line under the heading: how many jobs are **open**, and how many are **red**. If you can move jobs, it also says **Drag cards to change status**.
3. To report a new job, select **Log Issue** 2. See Logging a maintenance job.
4. To narrow the board, select **Filters** 3. In the **Filter maintenance** window:
   - **Nurseries**: select one or more nurseries.
   - **Owner**: choose people from **Add an owner...**.
   - **Show completed tickets**: completed jobs are hidden until you tick this.
   - **Category**: select one or more categories, such as **Plumbing** or **Safety**.
   - **Planned date**: jobs whose planned date falls in the range.
   - **Contractor on site**: jobs whose estimated start and end dates overlap the range.

   Close the window when you're done. Each filter you've set shows as a chip next to **Filters**; select a chip's cross to remove it, or **Clear all** to remove them all.

5 To find a job quickly, type in the search box 4. It matches the title, nursery, room, owner, contractor and category, and says how many jobs match.

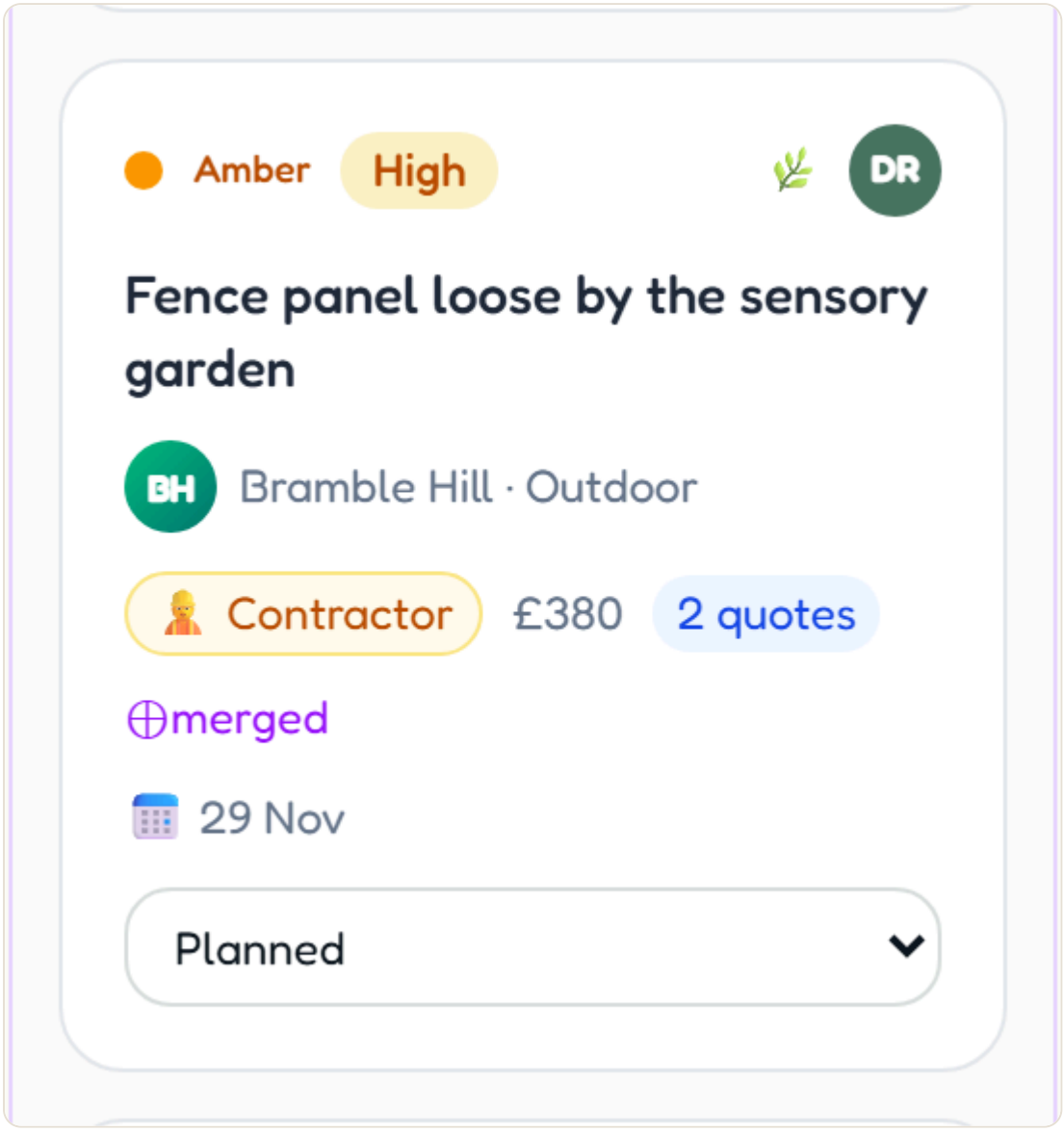
6 Each column 5 is a status, with a count of the jobs in it and a one-line reminder of what it means (for example "New, not yet assessed"). A long column scrolls on its own. Scroll sideways, or select the arrow at the edge of the board, to see **Quality check** and **Completed**.

7 Select **Compact view** to show each card on fewer lines when the board is busy. Beacon remembers your choice on this device. **Full view** puts it back.



The board, filtered and searched from the top. The highlighted card is one job.

Read a card



A ticket card.

From the top, a card shows:

- the **RAG colour** (red, amber or green) and the **priority** (Low, Medium, High or Critical);
- a small category symbol, and the owner's initials (or a builder symbol if a contractor is needed but nobody owns it);
- the **title**, then the nursery and room;
- **Contractor** if the job needs an outside contractor, the estimated cost, the number of quotes (for example **2 quotes**), a link symbol with a count if the job came from an inspection, and **merged** if duplicates were merged into it;
- the planned date;
- if you can move jobs, a status list you can use instead of dragging.

Open a job

Select a card to open the job's own page, with its details, quotes, status buttons and history. See A job's page: details, owner and comments.

What you should see

> The board shows only the jobs that match your filters and search, with each column's count updated. The filters are part of the page address, so you can bookmark a filtered board or send the link to a colleague who can see the same nurseries.

Common problems

Maintenance isn't in my menu, or it takes me back to the dashboard.
Your maintenance access is **None**. Ask your area support manager to give you access.

The board says "Read-only · You can add new items".
You have Contributor access: you can log jobs, but only someone with Manager access can move or change them. See Logging a maintenance job.

A job I know about isn't on the board.
Check the filter chips and the search box, and tick **Show completed tickets** under **Filters** if it may have been finished. A job merged into another one no longer appears on its own.

The open count here doesn't match the RAG report.
The board's count leaves out jobs in **Quality check**; the report counts them as open. Both are right for what they measure.

I can't drag cards.
Only people with Manager maintenance access can move jobs. On a touch screen, press and hold a card before dragging it.

Related guides

- About maintenance
- Logging a maintenance job
- Moving a job through its statuses
- Priority and RAG status
- The maintenance RAG report

MAINTENANCE

Maintenance: logging a maintenance job

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Nursery manager Maintenance manager Area support manager	**Maintenance** › **Log Issue**	2 minutes	Maintenance access: Contributor or Manager

Purpose

Report anything that needs fixing, replacing or checking, so that it reaches the maintenance team, gets a priority, and is tracked until it's done. A job logged here goes straight into **Triage** for the maintenance team to look at.

If the problem puts children or staff at risk now, make the area safe and follow your nursery's own procedure first, then log it with priority **Critical**.

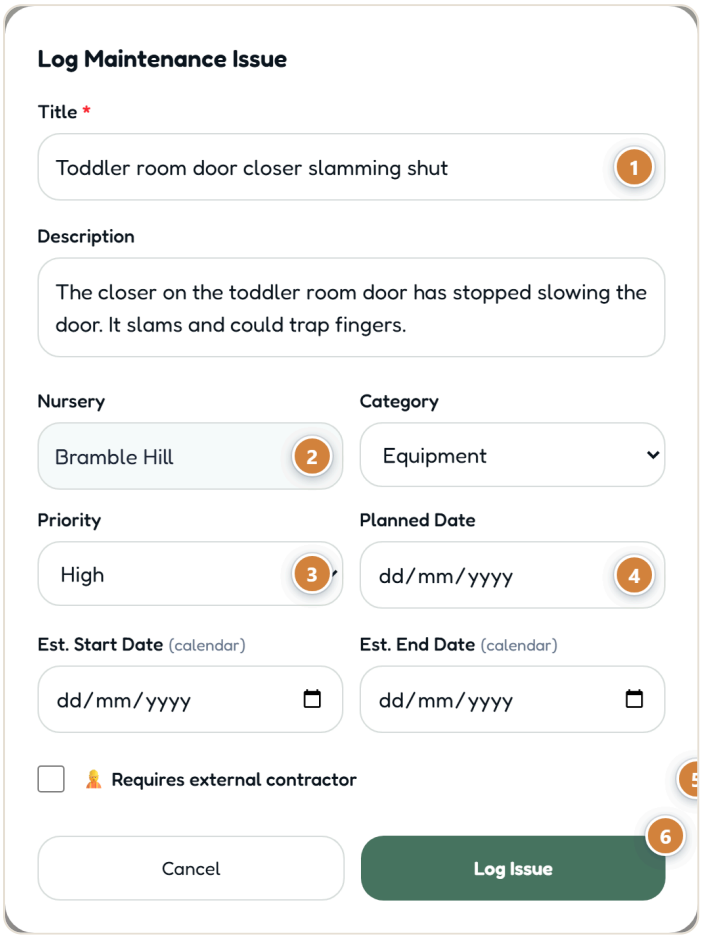
Before you start

- You have **Contributor** or **Manager (full)** maintenance access. With Read-only access there's no **Log Issue** button; ask your nursery manager to log it for you.
- Know which nursery it's at. If you only look after one nursery, Beacon fills it in for you.
- Search the board first, in case someone has already logged the same thing.

Log a job

1. In the menu, select **Maintenance**, then **Log Issue** at the top right.
2. Type a short, clear **Title** 1, for example "Toddler room door closer slamming shut". It's the only field you must fill in.
3. Add a **Description**: where exactly, what's wrong, and anything you've done to make it safe.
4. Check the **Nursery** 2. If you look after one nursery it's shown and can't be changed. Group-wide users choose one, or **Group-wide** for a job that isn't at one nursery.
5. Choose a **Category** (General, Electrical, Plumbing, Structural, Equipment, Safety, Grounds, IT, External Contractor or Other).
6. Choose a **Priority** 3: **Low**, **Medium** (the default), **High** or **Critical**. Critical jobs always show as red.

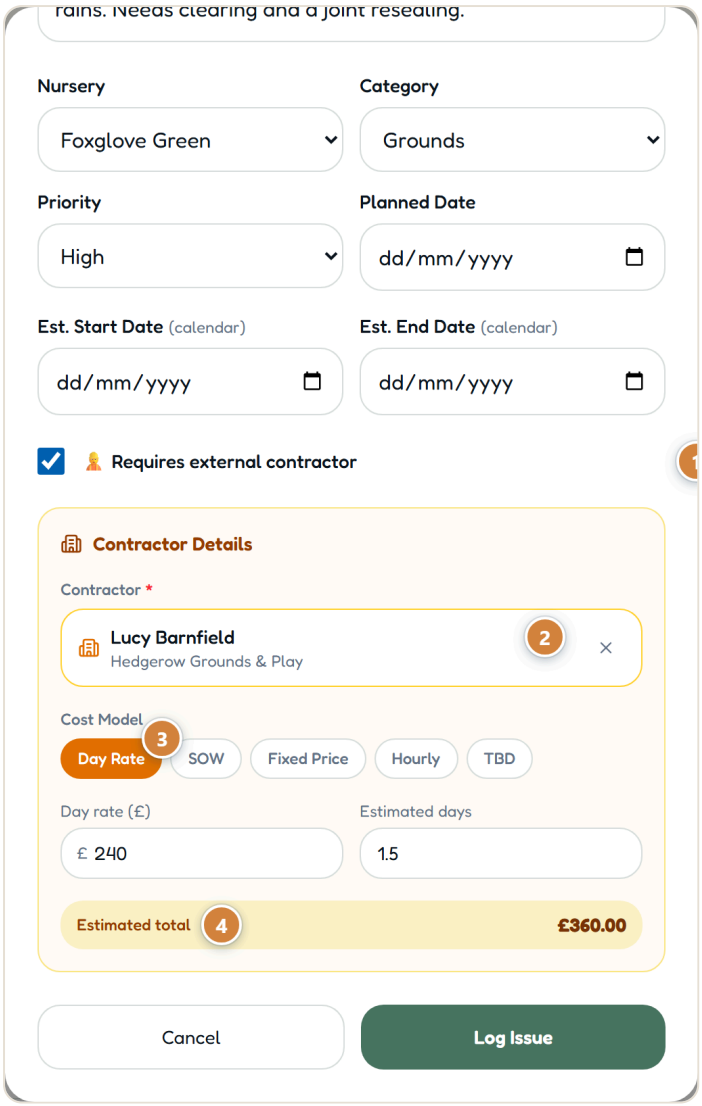
7. If you know when it should be done, choose a **Planned Date** 4. If the work already has dates, add **Est. Start Date** and **Est. End Date**: these put it on the Calendar.
8. If an outside contractor will be needed, tick **Requires external contractor** 5 (see below).
9. Select **Log Issue** 6.



Logging a job. A nursery manager's nursery is filled in for them.

If the job needs a contractor

1. Tick **Requires external contractor** 1. A **Contractor Details** section opens.
2. Under **Contractor**, type a name to search your contractor list and select one 2. If they aren't listed, select **Add new contractor** and fill in their name, company, email and phone.
3. Under **Cost Model** 3, choose how they charge: **Day Rate**, **SOW** (an agreed statement of work), **Fixed Price**, **Hourly** or **TBD** if you don't know yet.
4. Fill in the figures for that model. Beacon shows the **Estimated total** 4: day rate times days, hourly rate times hours, or the agreed or fixed price.



A job that needs a contractor, with a day-rate estimate.

What you should see

Beacon says **Maintenance item created** and the job appears in the **Triage** column of the board, with its RAG colour and priority. Its activity starts with "Item created and added to Triage". Someone with Manager access then triages it (see Moving a job through its statuses).

Common problems

There's no Log Issue button.
Your maintenance access is Read-only. Ask your nursery manager or area support manager.

"Choose a contractor before setting a … cost".
A cost model other than TBD needs a contractor. Choose one, or set the cost model to **TBD**.

"Failed to create item", or a message about your nursery.
Check the title isn't empty. If you look after one nursery, you can only log jobs for it: only group-wide users can log a group-wide job.

The contractor search says "No contractors found".
Only people with Manager (full) maintenance access can see the contractor list. Leave **Requires external contractor** unticked and say who you'd suggest in the description; the maintenance team can add the contractor when they triage the job.

I can't choose a room.
Rooms aren't on the Log Issue form. Say where in the description; the maintenance team can set the **Area/Room** when they edit the job.

Related guides

- The maintenance board
- Priority and RAG status
- Quotes and cost estimates
- Contractors

MAINTENANCE

Maintenance: moving a job through its statuses

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Maintenance manager Area support manager	**Maintenance**	Seconds per job	Maintenance access: Manager (full)

Purpose

A job's status says where it has got to, so everyone can see what's waiting and what's done. Keep statuses up to date as the work moves on: the board, the RAG colours, the Calendar and the RAG report all depend on them.

Before you start

- You have **Manager (full)** maintenance access. Area support managers and maintenance managers always do. Everyone else can look but not move jobs.
- To move a job to **Planned**, it needs a **Planned Date**. To move it to **In progress**, it needs an **Est. Start Date** and an **Est. End Date**. See Scheduling a job.

Triage new jobs

Check the **Triage** column ("New, not yet assessed") every day. For each new job:

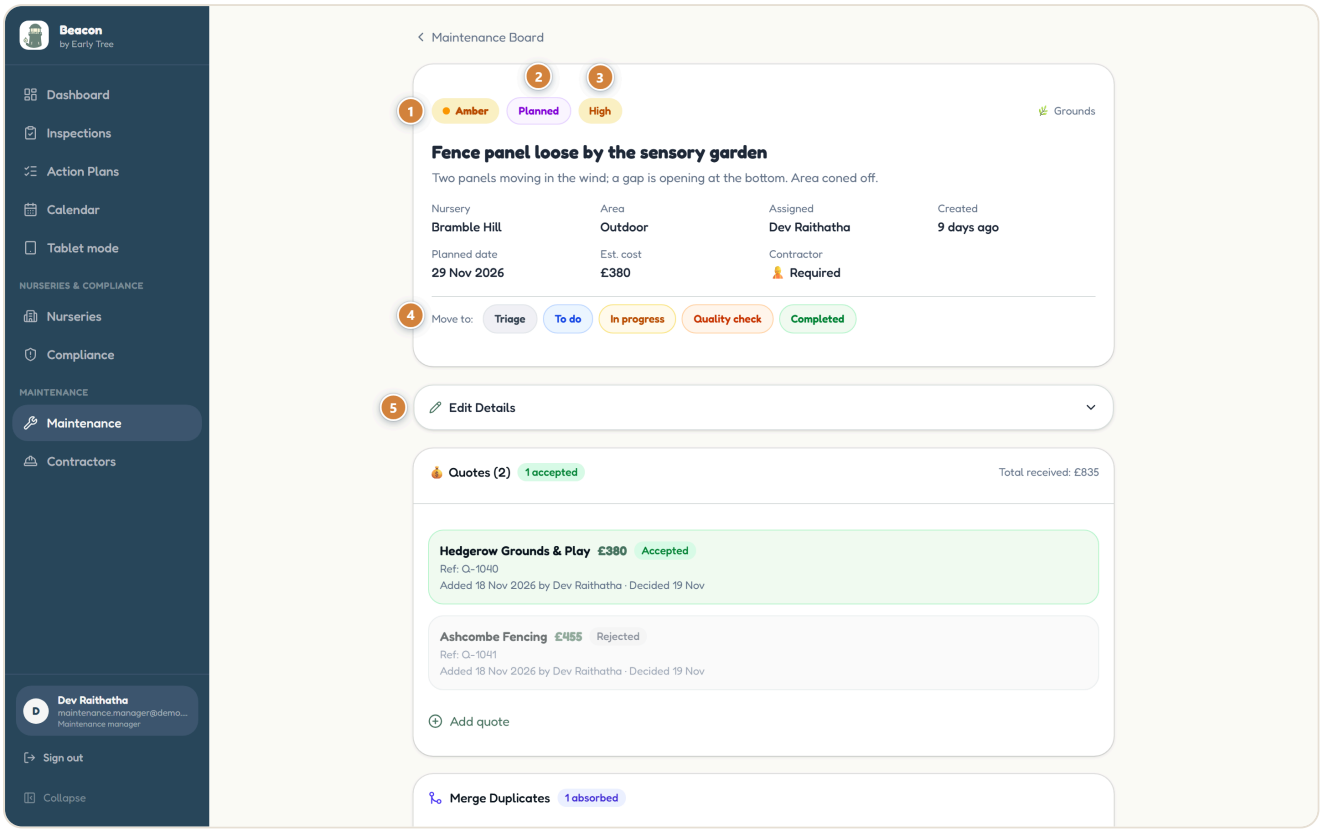
1. Open it and read the description. If it's the same as another job, merge it (see Merging duplicate jobs).
2. Check the priority and category, and set an owner and the area or room, under **Edit Details** (see A job's page).
3. Move it on: to **To do** if it's agreed but not booked, or to **Planned** once you've booked a date or a contractor.

Move a job

There are three ways to move a job. They all do the same thing.

1. **On the board, drag the card** into another column. On a touch screen, press and hold the card first.
2. **On the board, use the status list** at the bottom of the card, and choose the new status.

3 **On the job's page, use Move to** 4 : select the status you want.



A job's page. Move to (4) changes the status; the RAG colour (1), status (2) and priority (3) are at the top.

Small jobs that are done on the spot can go straight from **Triage**, **To do** or **Planned** to **Quality check** or **Completed**, without passing through **In progress**. Beacon allows it and notes "quick completion, skipped In Progress" in the job's history.

What you should see

> Beacon says **Moved to** and the new status, the card moves to that column, and the job's history records the change with your name and the time. Moving a job to **Completed** also records today as its completed date (see Checking and completing a job).

Common problems

"Set a planned date before moving this to Planned."
Open the job, select **Edit Details**, fill in **Planned Date**, save, and move it again.

"Set an estimated start and end date before marking this In Progress."
Open the job, select **Edit Details**, fill in **Est. Start Date** and **Est. End Date**, save, and move it again. See Scheduling a job.

"Manager access required to update items".
You have Contributor access. You may see the **Move to** buttons on a job's page, but only someone with Manager (full) access can change a job. Ask your maintenance manager.

The card jumped back to its old column.
The change wasn't saved: the message at the bottom of the screen says why. Fix that and try again.

Related guides

- The maintenance board
- Scheduling a job
- Checking and completing a job
- Priority and RAG status

MAINTENANCE

Maintenance: a job's page, details, owner and comments

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Maintenance manager Area support manager Everyone with maintenance access (to read)	**Maintenance** › **a job**	A few minutes	Maintenance access: Read-only to view; Manager (full) to change or comment

Purpose

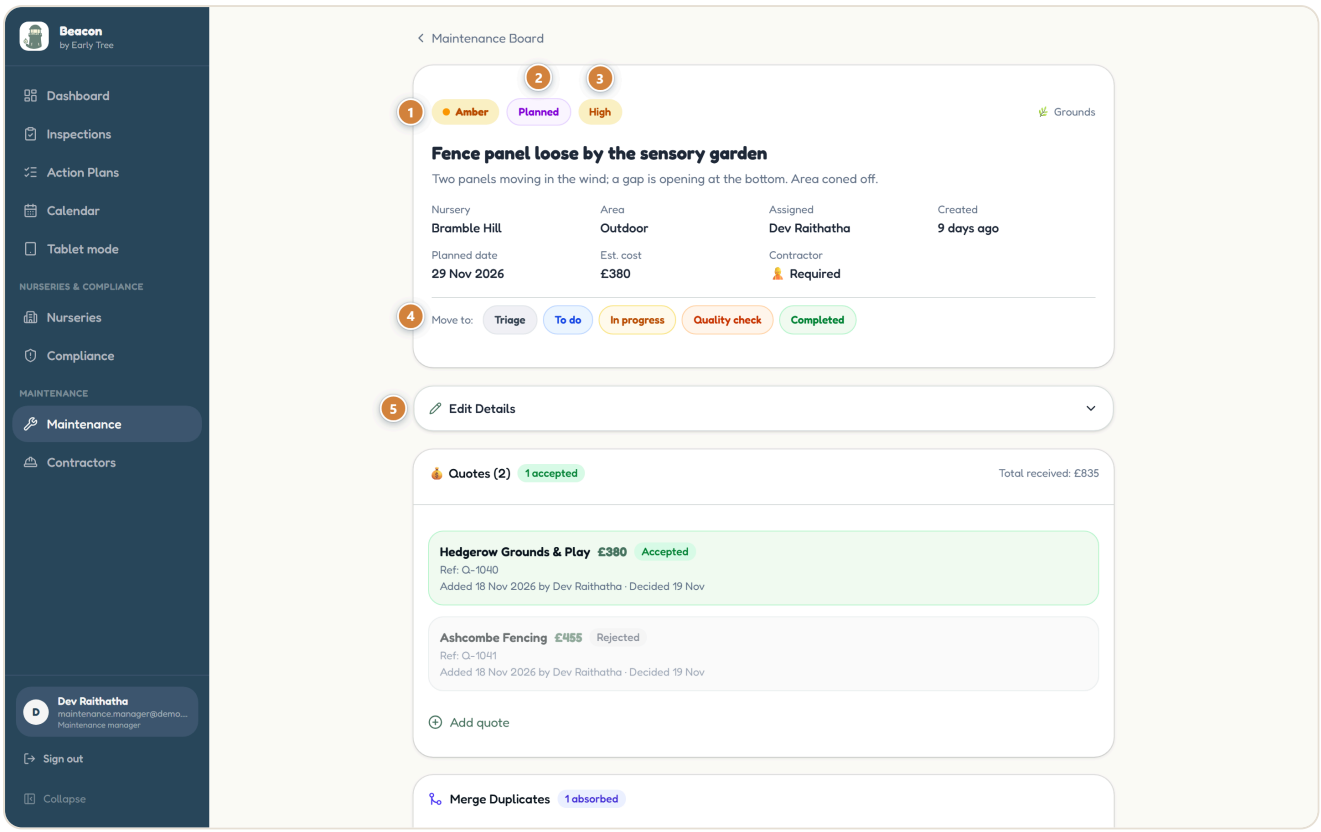
Every job has one place that holds everything about it: what's wrong, where, who owns it, when it's planned, what it costs, its quotes, the inspection it came from, and a history of every change and comment. Keeping it up to date means nobody has to chase anyone for news.

Before you start

- You can open any job you can see on the board.
- To change a job or add a comment you need **Manager (full)** maintenance access.

Open a job

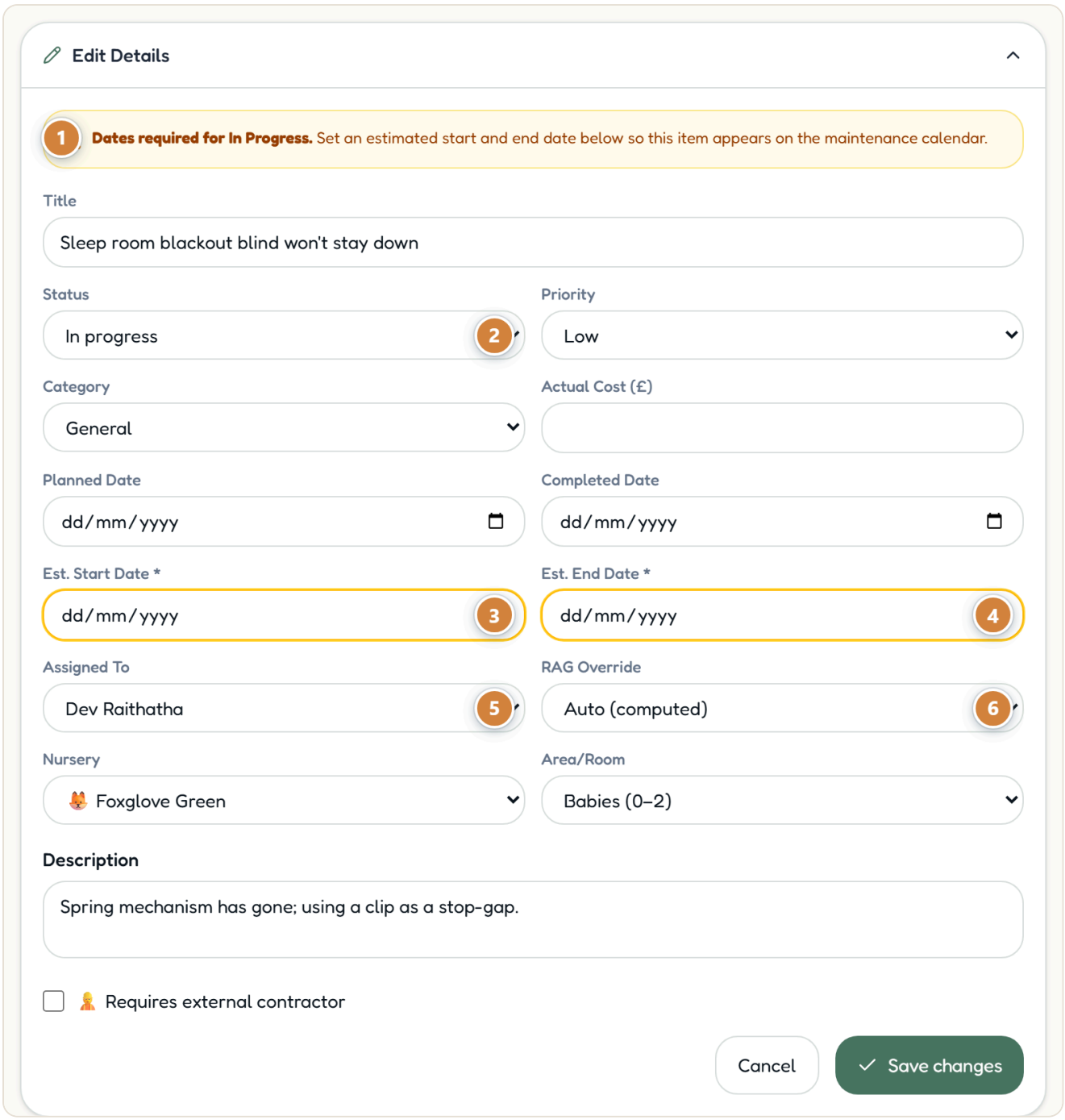
1. On the board, select the job's card. The job's own page opens, with its RAG colour, status and priority at the top, then the description, nursery, area, owner, dates and costs, the **Move to** buttons, **Edit Details**, quotes, any linked inspections, **Merge Duplicates** and **History & Comments**.
2. To go back, select **Maintenance Board** at the top of the page.



A job's page.

Change a job's details

1. On the job's page, select **Edit Details**. The form opens.
2. Change what you need: **Title**, **Status** 2, **Priority**, **Category**, **Actual Cost (£)**, **Planned Date**, **Completed Date**, **Est. Start Date** 3 and **Est. End Date** 4.
3. Choose the owner under **Assigned To** 5. Choose **Unassigned** to clear it.
4. Leave **RAG Override** 6 on **Auto (computed)** unless you have a reason to set the colour yourself (see Priority and RAG status).
5. Check the **Nursery** and choose the **Area/Room**. Choose **Group-wide** for a job that isn't at one nursery.
6. Edit the **Description** if needed. Tick **Requires external contractor** to choose the contractor and cost model (see Quotes and cost estimates); a change of contractor or cost is recorded in the history.
7. Select **Save changes**.



Edit Details. The warning (1) appears when a job is In Progress without its programme dates.

What you should see

Beacon says **Saved** and the page shows the new details. A change of status, priority or owner is added to the **History & Comments** list with your name and the time.

Add a comment

Use comments for news that isn't a field: "Contractor booked for Thursday morning", "Parts on order".

1. On the job's page, scroll to **History & Comments**.
2. Type in **Add a comment or update…** and select the send button, or press Ctrl+Enter.
3. To bring a colleague in, type @ and choose them from the list. Where your organisation has email switched on, they're emailed a link to the job.
4. If your organisation uses Nina, mention @Nina to ask her about the job; her reply appears in the history.

What you should see

> Your comment appears in the history, with your name and the time. The history also shows every status, priority, owner and cost change, quotes, merges and links to inspections, oldest first.

Where a job came from

If a job was raised by an inspection, the job's page has an **Inspection History** card listing the inspection (with the nursery, date and the maintenance note's title and severity). Select the nursery name to open that inspection's report. The card on the board shows a link symbol with a count. Jobs raised from an action plan say so in their history: "Raised from action item …". See About maintenance.

Common problems

There's no Edit Details or Move to on the page.
Your maintenance access is Read-only. You can read the job but not change it.

I can see Edit Details, but saving says "Save failed", or a comment says "Failed to post comment".
You have Contributor access: the page shows the controls, but only someone with Manager (full) access can change a job or comment on it. Ask your maintenance manager to make the change.

"Choose a contractor before setting a … cost".
A cost model other than TBD needs a contractor. Choose one under **Contractor**, or set the cost model to **TBD**.

A colleague isn't in the @ list.
Only active people with a working role are listed (not the read-only auditor). Ask an administrator to check their account.

"That person can't be given work at this nursery".
The owner must have a working role at the job's nursery, or group-wide. Choose someone else, or ask an administrator to give them the nursery.

Related guides

- The maintenance board
- Moving a job through its statuses
- Scheduling a job
- Quotes and cost estimates

MAINTENANCE

Maintenance: priority and RAG status

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Maintenance manager Area support manager Nursery manager	**Maintenance** › **a job** › **Edit Details**	1 minute	Maintenance access: Manager (full) to change

Purpose

Priority says how serious a job is. The RAG colour says whether it needs attention now. Together they make sure dangerous or late jobs stand out on the board, on the Calendar and in the RAG report.

Before you start

- Anyone with maintenance access can see priorities and RAG colours. Changing them needs **Manager (full)** access.

Priority

Priority	Use it for
Critical	A risk to children or staff, or something that stops the nursery running safely. Always red.
High	Needs doing soon. At least amber until it's checked.
Medium	The default for a new job.
Low	Can wait for a convenient time.

Jobs from an inspection take their priority from the inspector's note: **Urgent** becomes Critical, **Required** becomes High, anything else Medium.

How Beacon works out the RAG colour

Beacon checks these rules in order and uses the first that fits:

1. **Green** if the job is in **Quality check** or **Completed**: the work is done.
2. **Red** if the priority is **Critical**.
3. **Red** if the planned date has passed (by UK date, so a job due today isn't late until tomorrow).
4. **Amber** if the priority is **High**.
5. **Amber** if the planned date is within the next 7 days.

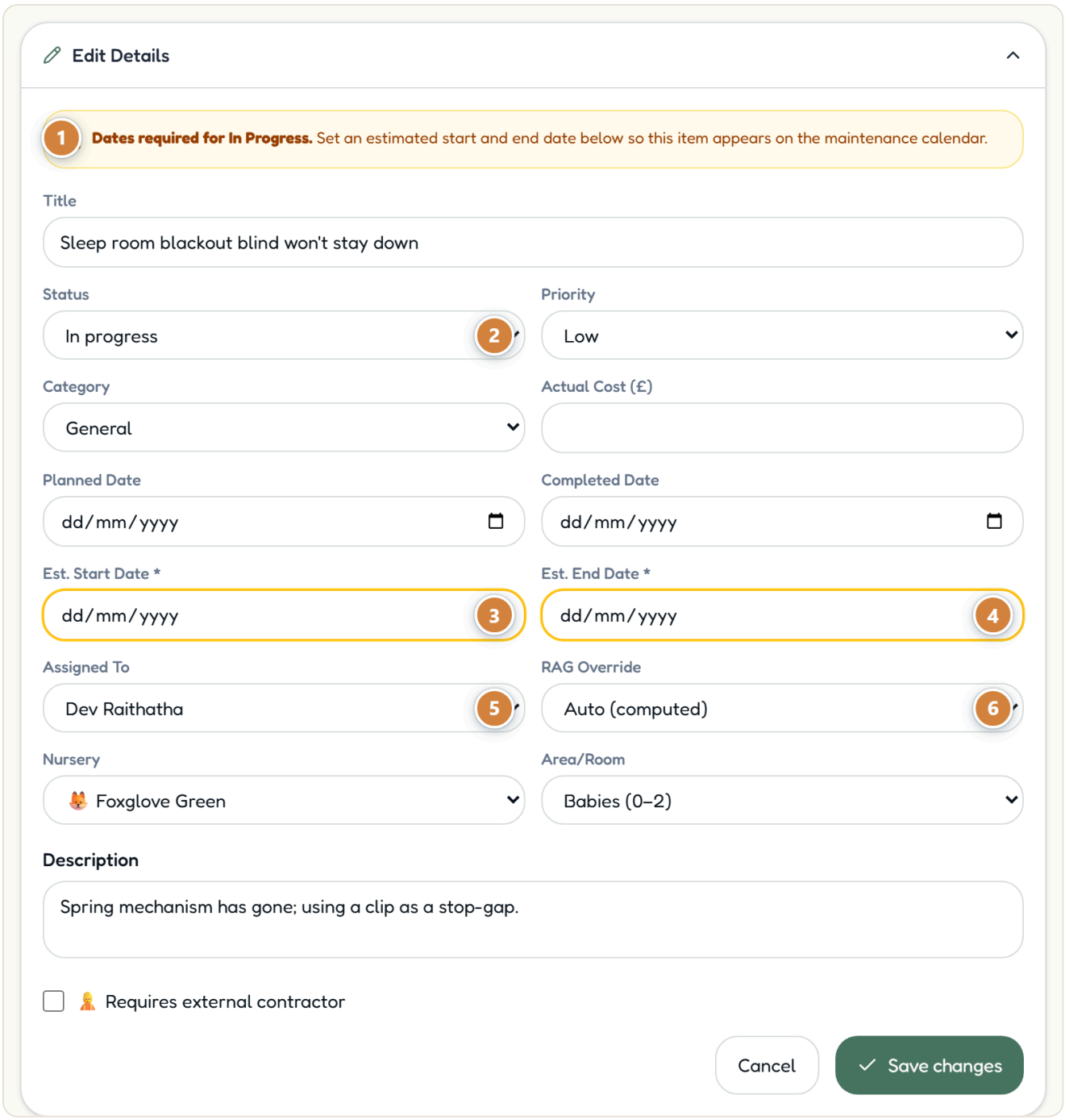
6. **Amber** if the job is in **Triage** or **To do** with no planned date: nobody has booked it yet.
7. **Green** otherwise.

The colour updates by itself as dates pass and statuses change.

Override the colour

Occasionally you know something Beacon doesn't: a high-priority job that's safely contained, say, or a low-priority one that's become urgent.

1. Open the job and select **Edit Details**.
2. Under **RAG Override**, choose **Green**, **Amber** or **Red**.
3. Select **Save changes**.
4. Explain why in a comment, so the next person understands.



RAG Override (6) is on Auto (computed) unless someone sets it.

What you should see

The job shows the colour you chose everywhere: its card, its page, the Calendar and the RAG report. It stays that colour until someone sets **RAG Override** back to **Auto (computed)**.

Common problems

A job stays red after the work was booked.
Check its priority (Critical is always red) and its planned date (a date in the past is red). Update the planned date, or move the job on. If it's still red, check whether someone set a **RAG Override**.

A job stays the same colour whatever happens.
Someone has overridden it. Set **RAG Override** back to **Auto (computed)**.

A new job is amber even though it's low priority.
It's in Triage or To do without a planned date. Give it a planned date, and it turns green if that's more than a week away.

Related guides

- The maintenance board
- Scheduling a job
- The maintenance RAG report

MAINTENANCE

Maintenance: scheduling a job

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Maintenance manager Area support manager	**Maintenance** › **a job** › **Edit Details**	1 minute	Maintenance access: Manager (full)

Purpose

Dates tell everyone when a job will happen. Beacon uses two kinds:

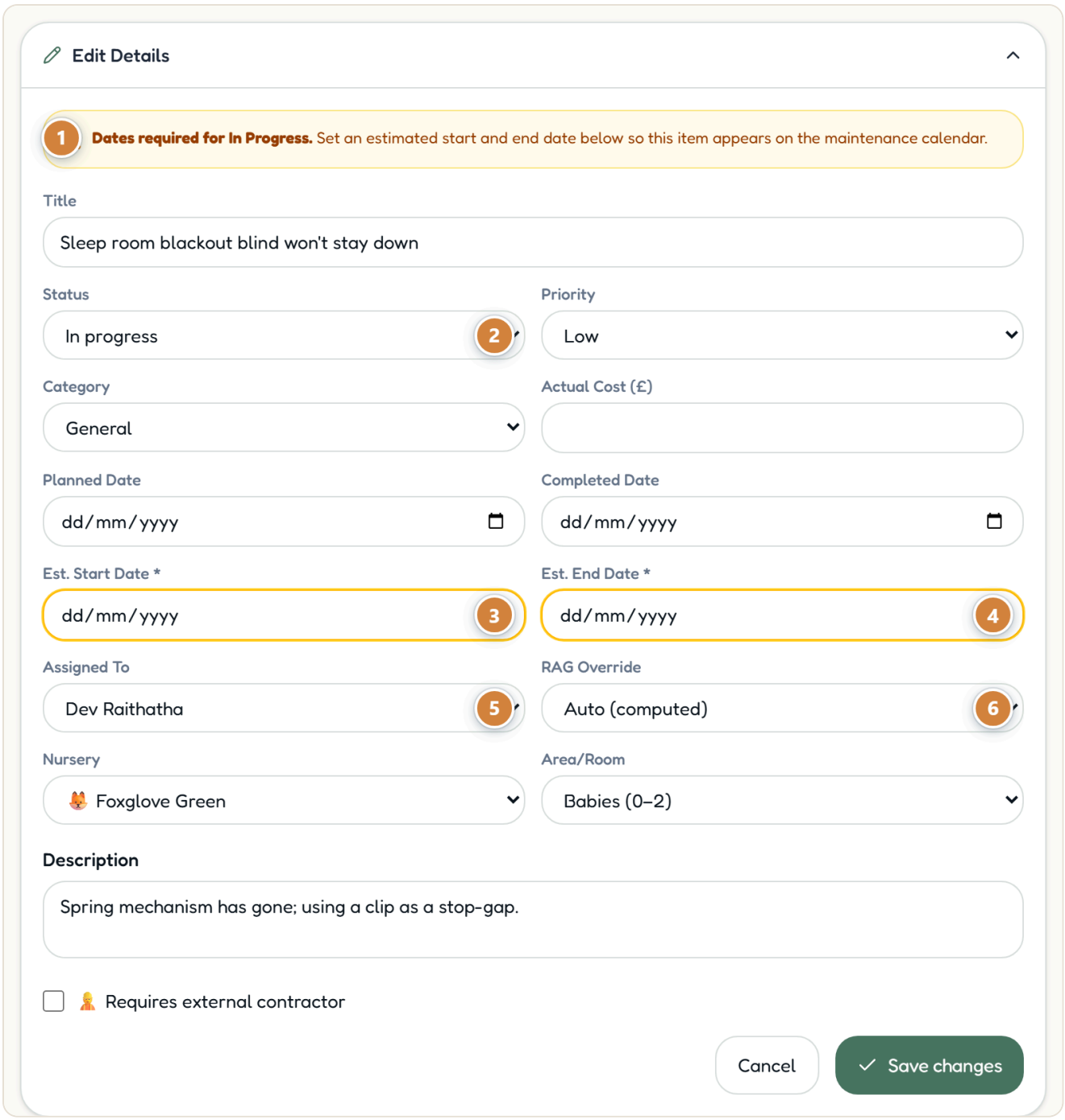
- **Planned Date**: the day the job should be done by. It drives the RAG colour (red once it has passed) and the board's **Planned date** filter, and Beacon won't let a job move to **Planned** without it.
- **Est. Start Date** and **Est. End Date**: the programme window when work, usually a contractor's, is on site. They put the job on the Calendar as a bar across those days, and drive the board's **Contractor on site** filter. Beacon won't let a job move to **In progress** without them.

Before you start

- You have **Manager (full)** maintenance access.
- Agree the dates with the contractor or whoever is doing the work.

Set the dates

1. Open the job and select **Edit Details**. If the job is **In progress** without dates, a warning says **Dates required for In Progress** (1).
2. Set the **Planned Date**.
3. Set **Est. Start Date** (3) and **Est. End Date** (4). For a one-day job, use the same date for both.
4. If the job is booked, change **Status** (2) to **Planned**, or to **In progress** once work starts.
5. Select **Save changes**.



Programme dates are required before a job can be In progress.

What you should see

Beacon says **Saved**. The planned date shows on the job's card and page, and the RAG colour updates. The job appears on the **Calendar** across its start and end dates, until it's completed. See Calendar.

Move a job's dates on the Calendar

Area support managers can drag a maintenance job's bar along the Calendar to move its start and end dates together. Beacon says **Dates updated**. Other people change the dates in **Edit Details**.

Common problems

A job isn't on the Calendar.
It has no **Est. Start Date**, or it's completed. A planned date on its own doesn't put a job on the Calendar.

I can't drag a job on the Calendar.
Only area support managers can. Change the dates in **Edit Details** instead.

"Set an estimated start and end date before marking this In Progress."
Set both dates in Edit Details, save, then move the job.

"Set a planned date before moving this to Planned."
Set the **Planned Date** in Edit Details, save, then move the job. Edit Details also warns **Date required for Planned** if you choose Planned without one.

Related guides

- Moving a job through its statuses
- Priority and RAG status
- Calendar

MAINTENANCE

Maintenance: quotes and cost estimates

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Maintenance manager Area support manager	**Maintenance** › **a job** › **Quotes**	2 minutes per quote	Maintenance access: Manager (full)

Purpose

Keep the money side of each job in one place: what you expect it to cost, the quotes you've had, which one you accepted, and what it actually cost. The RAG report adds these up into spend and budget figures for the group.

Before you start

- You have **Manager (full)** maintenance access.
- Have each quote to hand: the supplier, the amount and their reference.

Estimate the cost with a cost model

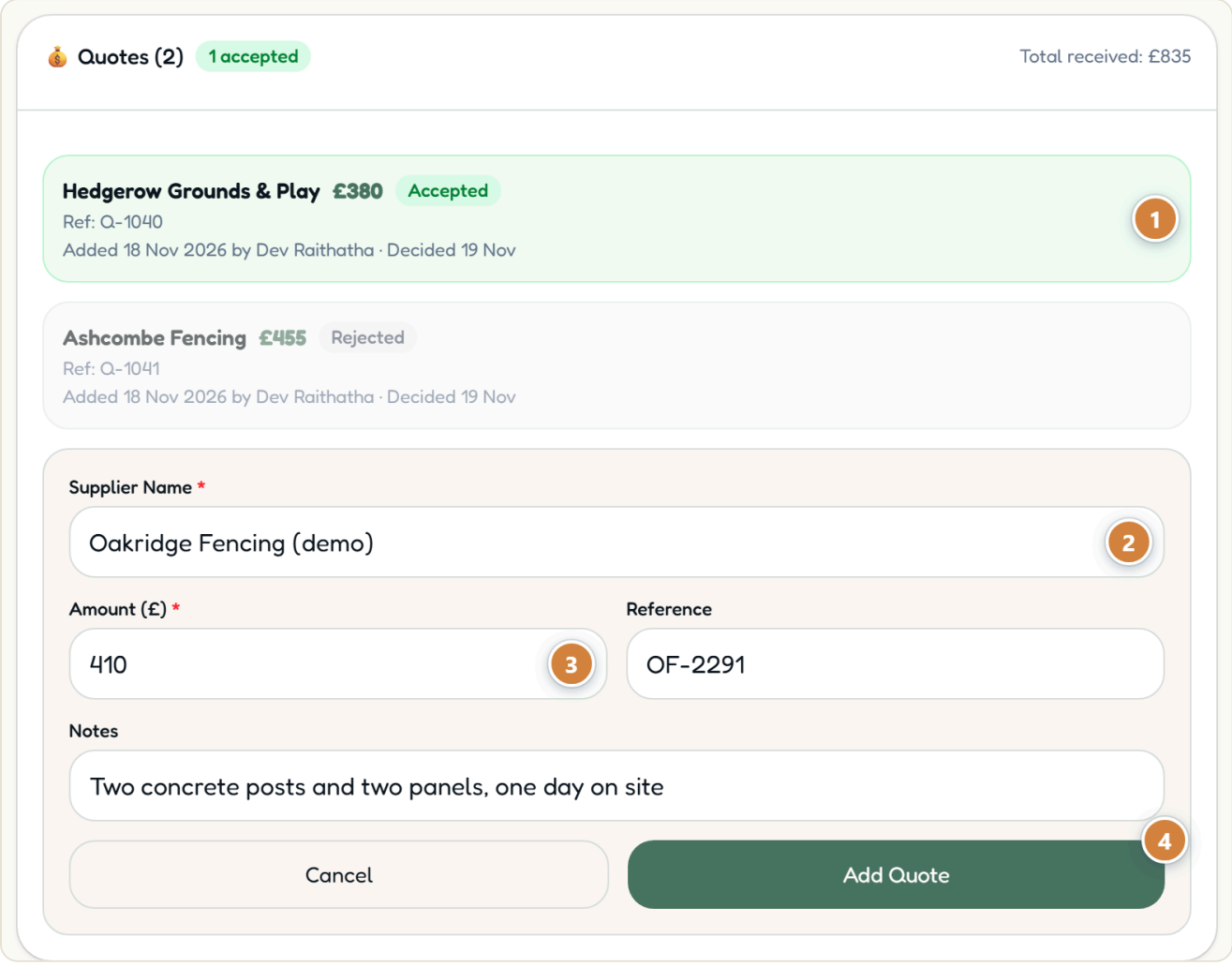
When a job needs a contractor, tick **Requires external contractor** (when logging the job, or in **Edit Details**) and choose a **Cost Model**:

Cost Model	How the estimate is worked out
Day Rate	**Day rate (£)** times **Estimated days**
Hourly	**Hourly rate (£)** times **Estimated hours**
SOW	The **SOW value (£)** agreed in a statement of work
Fixed Price	The **Fixed price (£)** quoted
TBD	No estimate yet

Beacon shows the **Estimated total** as you type, and saves the contractor, the cost model and the figures with the job, with the total as its **Est. cost**. A cost model other than **TBD** needs a contractor. See Logging a maintenance job.

Record a quote

1. Open the job's page from the board and scroll to **Quotes**. Any quotes already recorded are listed, with accepted ones in green 1.
2. Select **Add quote**.
3. Type the **Supplier Name** 2 and the **Amount (£)** 3. Both are required.
4. Add the supplier's **Reference** (or your purchase order number) and any **Notes**, such as what's included.
5. Select **Add Quote** 4.
6. Repeat for each quote.



Recording a third quote. The accepted quote is green; rejected ones are greyed.

Accept or reject a quote

1. On a quote that's still **Pending**, select **Accept** or **Reject**.
2. Add a comment saying why, if it isn't obvious (for example "cheapest that can come this week").

If your organisation uses Nina, **Compare with Nina** appears once a job has two or more quotes. She compares them and posts her thoughts in the job's history; the decision is still yours.

What you should see

> Beacon says **Quote added**, or **Quote accepted** or **Quote rejected**. The quote shows its status and the date it was decided, the card heading counts the accepted quotes, and **Total received** adds up every quote. Each quote and decision is recorded in the job's history. Accepted quotes for open jobs count towards **Quoted (open)** in the RAG report.

Record the actual cost

When the work is paid for, open **Edit Details**, type the **Actual Cost (£)** and select **Save changes**. The RAG report uses actual costs for its spend figures.

Common problems

There's no Add quote, Accept or Reject.
You need Manager (full) maintenance access.

I accepted a quote, but the job's Est. cost didn't change.
Accepting a quote doesn't change the estimate. If the accepted price is different, update the cost model figures in Edit Details, or record the **Actual Cost (£)** when it's paid.

I accepted the wrong quote.
A decided quote can't be changed back to pending. Add the right quote again, accept it, and explain in a comment.

"Failed to save quote".
Check the supplier name and amount are filled in, and the amount is a number of pounds, 0 or more.

I'm a nursery manager and I can see Add quote, but saving fails.
Recording and deciding quotes needs Manager (full) maintenance access. Send the quote to your maintenance manager.

Related guides

- Logging a maintenance job
- Contractors
- The maintenance RAG report

MAINTENANCE

Maintenance: contractors

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Maintenance manager Area support manager	**Maintenance** › **Contractors**	2 minutes	Maintenance access: Manager (full)

Purpose

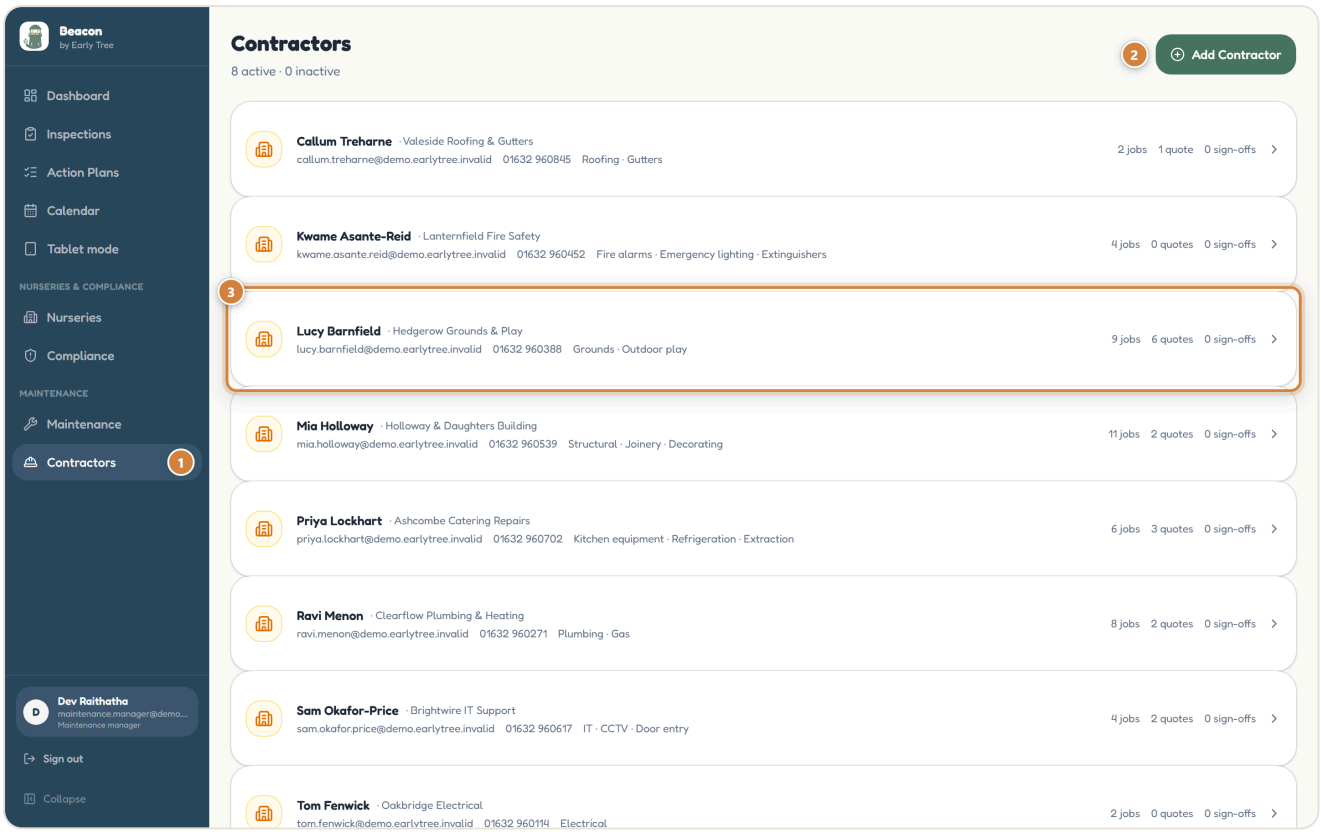
Keep one list of the contractors your organisation uses, with their contact details and trades, so that anyone booking a job picks the right firm and you can see what each one has done for you.

Before you start

- You have **Manager (full)** maintenance access, as area support managers and maintenance managers always do. Nobody else sees **Contractors** in the menu.
- Have the contractor's name, company, email, phone and trades.

See the contractor list

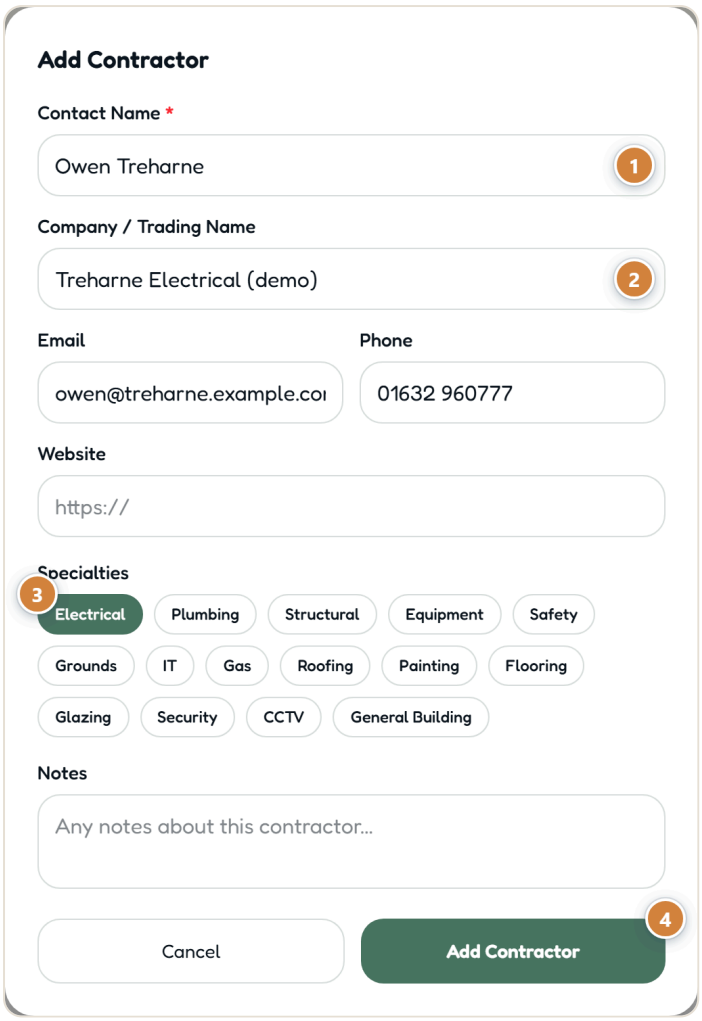
1. In the menu, under **Maintenance**, select **Contractors** 1. The page lists every contractor, active ones first, with how many are active and inactive.
2. Each row 3 shows the contact name and company, email, phone, up to three trades, and how many jobs, quotes and sign-offs they have.
3. Select a row to open the contractor's page.



The contractor list.

Add a contractor

1. Select **Add Contractor** 2 at the top right.
2. Type the **Contact Name** 1. It's the only field you must fill in.
3. Type the **Company / Trading Name** 2, and their **Email**, **Phone** and **Website**.
4. Under **Specialties**, select each trade they cover 3, for example **Electrical** or **Roofing**. Select one again to remove it.
5. Add any **Notes**, such as insurance or how to book them.
6. Select **Add Contractor** 4.

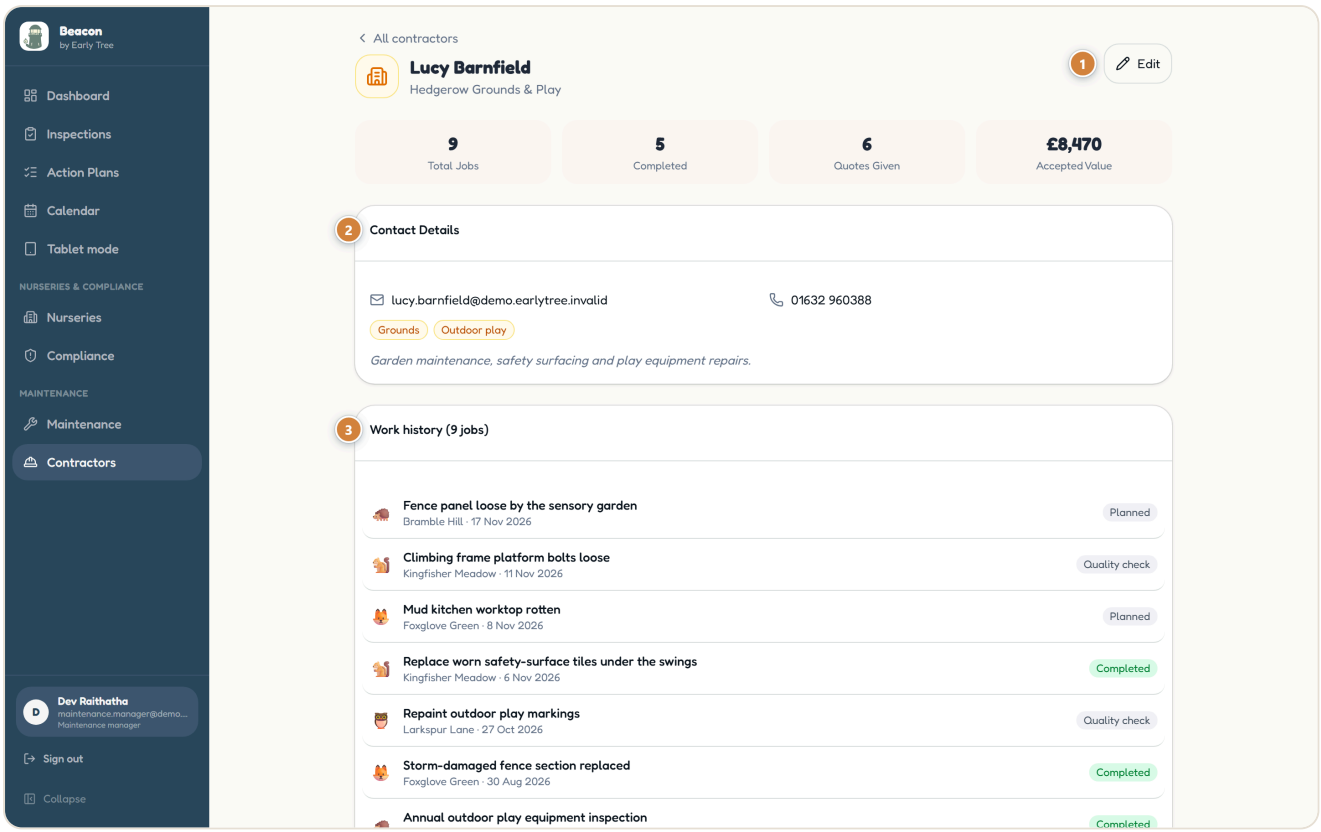


Adding a contractor.

People logging a job can also add a contractor on the spot, from **Add new contractor** in the contractor search (see Logging a maintenance job).

Update a contractor or mark them inactive

1. Open the contractor's page. It shows their totals (**Total Jobs**, **Completed**, **Quotes Given**, **Accepted Value**), their **Contact Details** 2, their **Work history** 3 and their sign-off history.
2. Select **Edit** 1.
3. Change their **Name**, **Company**, **Email**, **Phone**, **Specialties** or **Notes**.
4. To stop using a contractor without losing their history, untick **Active**.
5. Select **Save Changes**.



A contractor's page, with their work across every nursery.

What you should see

The contractor appears in the list (inactive ones at the bottom, under **Inactive**) and can be chosen when logging or editing a job. Their page lists every job they're linked to, with its nursery, date and status.

Common problems

Contractors isn't in my menu.
You need Manager (full) maintenance access. Ask your area support manager.

A contractor's counts are lower than I expected.
The counts only include jobs where that contractor is chosen, and quotes recorded against them. Quotes recorded on a job by supplier name aren't counted here. If you look after one nursery, the work history only shows that nursery's jobs.

I can't delete a contractor.
Contractors can't be deleted, so their history is kept. Untick **Active** instead.

Related guides

- Logging a maintenance job

- Quotes and cost estimates
- About maintenance

MAINTENANCE

Maintenance: merging duplicate jobs

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Maintenance manager Area support manager	**Maintenance** › **a job** › **Merge Duplicates**	1 minute	Maintenance access: Manager (full)

Purpose

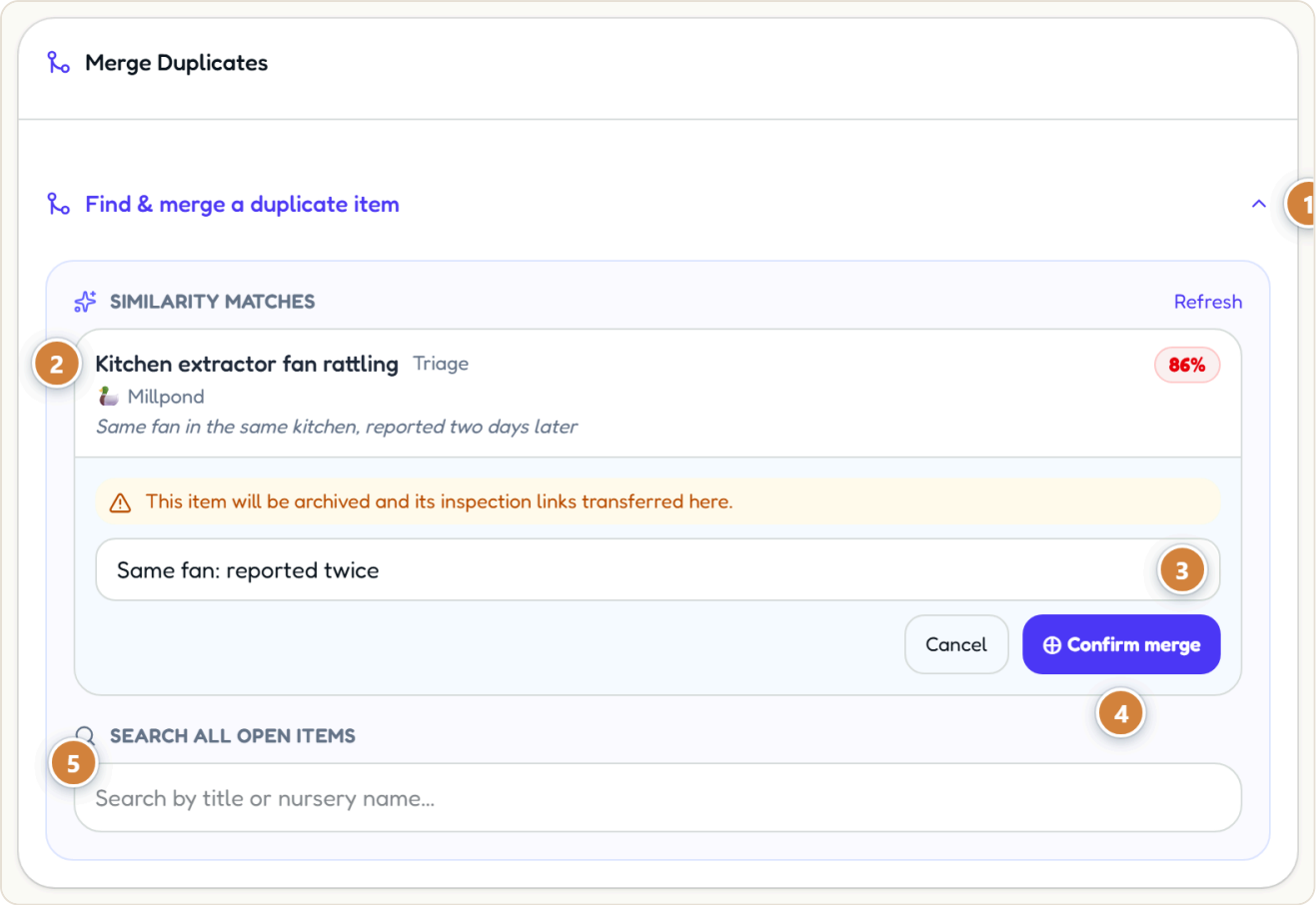
The same problem often gets reported twice: once from an inspection and once by the nursery, or by two members of staff. Merging keeps one job to track, with everything that pointed at either, so nobody books the work twice.

Before you start

- You have **Manager (full)** maintenance access.
- Decide which job to keep. Merge **into** the one with the most information (quotes, dates, owner, comments): the other one is archived.
- Check the two jobs really are the same problem. If you get it wrong, you can undo the merge (see Undo a merge).

Merge a duplicate into this job

1. On the board, select the job you're keeping to open its page.
2. Scroll to **Merge Duplicates** and select **Find & merge a duplicate item** 1.
3. Beacon looks for likely duplicates and lists them, each with how closely it matches and why 2. If the one you want isn't there, search for it by title or nursery name under **Search all open items** 5.
4. On the duplicate, select **Merge** →. Beacon warns: "This item will be archived and its inspection links transferred here."
5. Add a **Reason for merge** 3 if it helps, for example "Same fan: reported twice".
6. Select **Confirm merge** 4, or **Cancel** if you picked the wrong one.



Merging a duplicate. Nothing is merged until you select Confirm merge.

What you should see

> Beacon says the job was **merged successfully**. The duplicate disappears from the board, and the job you kept shows it under **Previously absorbed**, with a count of absorbed jobs and **merged** on its card. Both jobs' histories record the merge. Any inspections linked to the duplicate are now linked to the job you kept, and any action plan items it was tracking close when the job you kept is completed.

Undo a merge

On the job you kept, under **Previously absorbed**, select **Undo** next to the merged job, then **Undo merge**. It becomes a separate job again, with its own quotes and comments, and any inspections it brought with it are linked back to it. (For merges made before this option arrived, the inspection links stay on the job you kept.) Select a job's title under **Previously absorbed** to open it.

Merges and undos are recorded in both jobs' histories and in the audit log.

Common problems

There's no Merge Duplicates card.

You need Manager (full) maintenance access.

"Source item is already merged".

That duplicate has already been merged into another job. Open that job instead.

The duplicate's quotes and comments aren't on the job I kept.

A merge moves inspection links, not quotes or comments. They're still on the merged job: select its title under **Previously absorbed**. Add any quotes you need again on the job you kept.

I merged the wrong job.

Undo the merge from **Previously absorbed** on the job you kept.

Related guides

- A job's page and comments
- Quotes and cost estimates
- The maintenance board

MAINTENANCE

Maintenance: checking and completing a job

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Maintenance manager Area support manager	**Maintenance** › **a job**	A few minutes	Maintenance access: Manager (full)

Purpose

A job isn't finished until someone has checked the work. Moving a job through **Quality check** to **Completed** records that it has been checked, closes it, and closes any action plan items that were waiting on it, so the nursery's action plan is up to date without anyone having to chase it.

Before you start

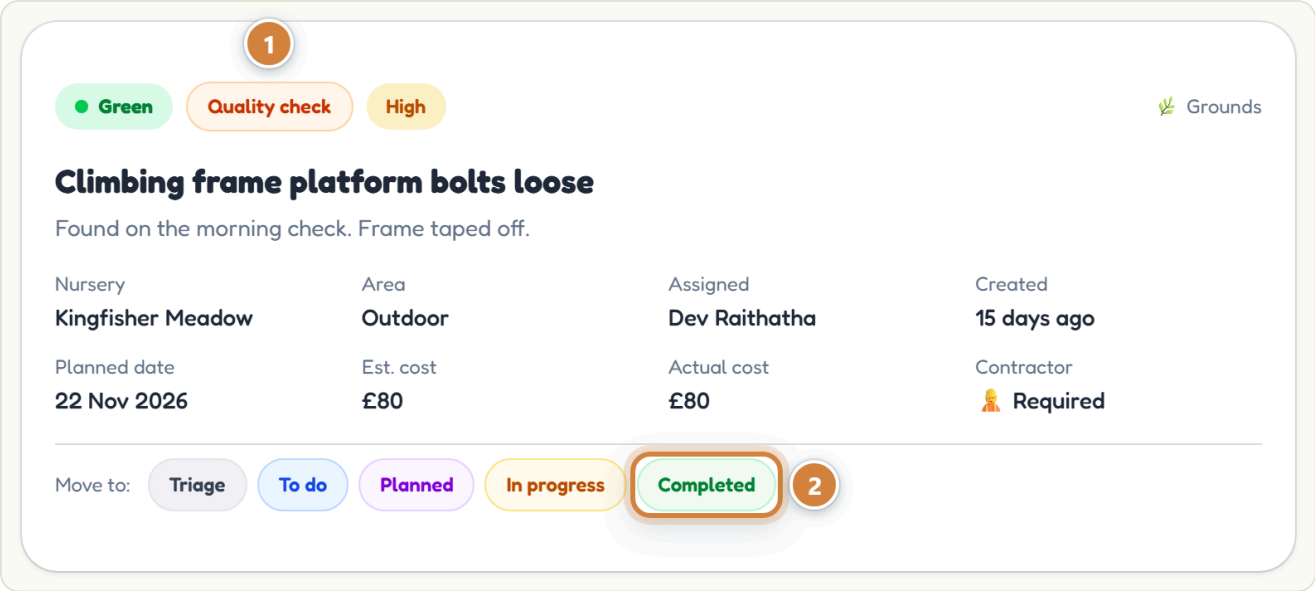
- You have **Manager (full)** maintenance access.
- The work has been done. Ideally someone at the nursery has looked at it.

Check the work

1. When the contractor or your team says the work is done, move the job to **Quality check** 1 (see Moving a job through its statuses). Jobs in Quality check show as green: the work is done, and only the check is left.
2. Check the work, or ask the nursery manager to. Add what you found as a comment, for example "Checked by the nursery manager, bolts tight, frame back in use".
3. If it isn't right, move it back to **In progress** and say what's wrong in a comment.
4. Record the **Actual Cost (£)** in **Edit Details**, if you know it.

Sign it off

1. On the job's page, under **Move to**, select **Completed** 2.



Completing a job that has been checked.

What you should see

> Beacon says **Moved to Completed**. Beacon records today as the job's completed date, and the job leaves the board (tick **Show completed tickets** under **Filters** to see it). It counts in the **Work Completed** figures of the RAG report.
>
> If the job was tracking an action plan item (for example a maintenance action from a signed-off inspection), that item is closed as **Verified** at the same time, and its activity says so. See Action plans.

Reopen a job

If the problem comes back soon after, open the completed job (tick **Show completed tickets** under **Filters** on the board) and move it back to the right status. Any action plan items that Beacon closed when the job was completed are reopened, so they show as outstanding again.

Common problems

The action plan item is still open after the job was completed.
Only items linked to this job close by themselves. Beacon also checks every day and closes any it missed. If one is still open the next day, ask your area support manager to check that it's linked to this job.

I can't find a completed job.
Tick **Show completed tickets** under **Filters** on the board, or search for it.

"Manager access required to update items".
You need Manager (full) maintenance access to complete a job.

Related guides

- Moving a job through its statuses
- A job's page and comments
- The maintenance RAG report

MAINTENANCE

Maintenance: the maintenance RAG report

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Maintenance manager Area support manager Nursery manager	**Maintenance** › **RAG Report**	5 minutes	Maintenance access: Read-only or above

Purpose

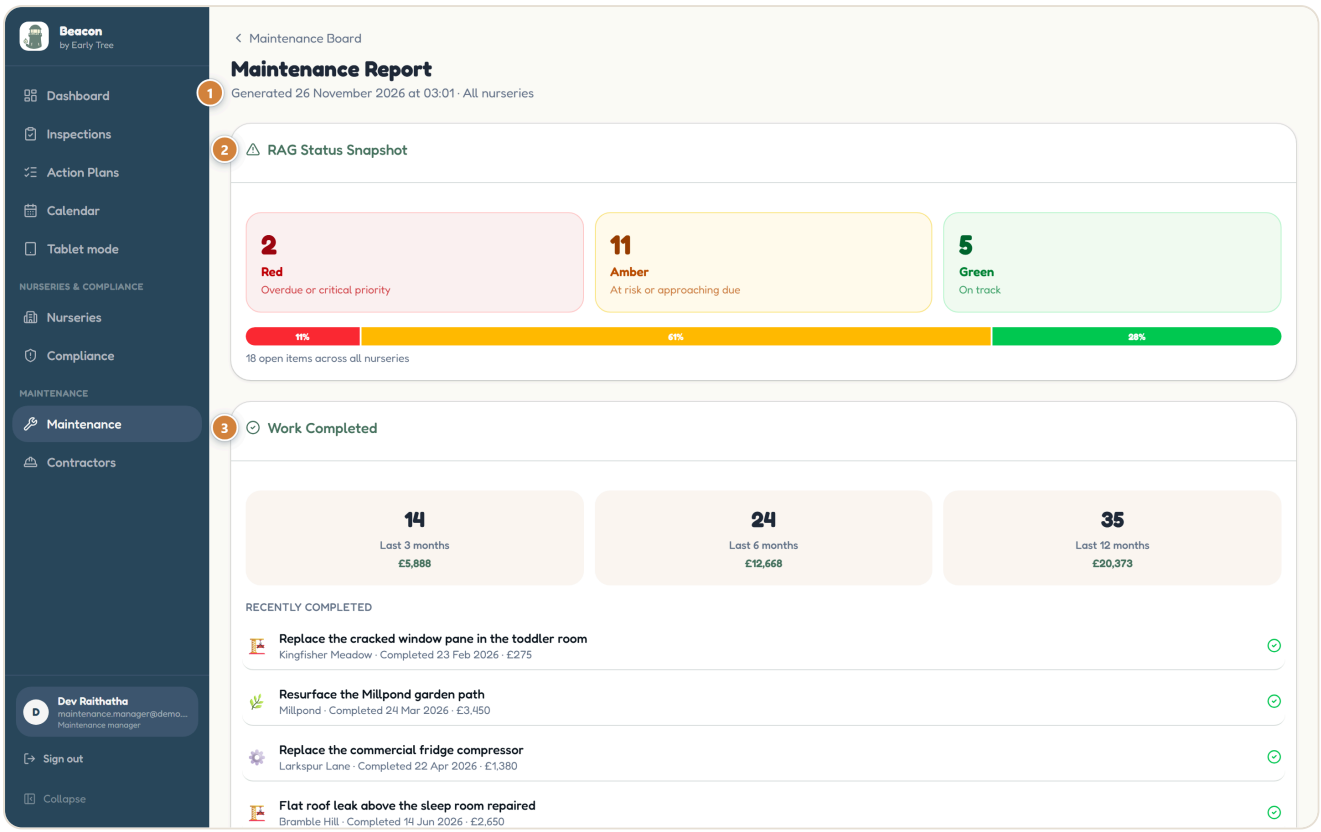
The report is a one-page summary of maintenance for the nurseries you can see: how many jobs are red, amber and green, what has been done and spent, what's still open, and roughly how long it will take to clear. Use it for monthly reviews, budget conversations and board reports.

Before you start

- You have maintenance access. The report covers the nurseries you can see: everything for group-wide users, your own nursery otherwise.
- The figures are only as good as the jobs: keep statuses, estimates and actual costs up to date.

Open and read the report

1. In the menu, select **Maintenance**, then **RAG Report** at the top right. The report is worked out when you open it, and says when (1) and which nurseries it covers.
2. **RAG Status Snapshot** (2): how many open jobs are **Red** (overdue or critical priority), **Amber** (at risk or approaching due) and **Green** (on track), as numbers and a bar.
3. **Work Completed** (3): jobs completed in the last 3, 6 and 12 months with what they cost, and the most recently completed jobs. Select one to open it.
4. **Budget & Costs**: **Spent** in the last 3 and 12 months (the actual cost where it's recorded, otherwise the estimate), **Quoted (open)** from accepted quotes on open jobs, the **Estimated pipeline** of open jobs, and **Spend by category (12 months)**.
5. **Open Work Pipeline**: open jobs by status, and **Open items per nursery** with how many are red and amber.
6. **Time to Completion Estimate**: the **Completion rate** (jobs completed per month, averaged over the last 3 months), the **Open items**, and **Est. months to clear** at that rate, with a short backlog summary.



The top of the maintenance RAG report.

What you should see

> Each section reflects your jobs as they are when you open the report. To keep a copy, use your browser's Print and choose to save as PDF.

Common problems

The report counts more open jobs than the board.

The report counts jobs in Quality check as open; the board's open count leaves them out.

Spend is lower than I expected.

Spend comes from jobs marked **Completed**, using the actual cost or the estimate. Record the **Actual Cost (£)** on each job when it's paid, and complete jobs when they're done.

Time to Completion Estimate says "Not enough history yet".

Beacon needs jobs completed in recent months to work out a rate. It appears once jobs start being completed.

Related guides

- Priority and RAG status
- Quotes and cost estimates

- Checking and completing a job