

Import an existing maintenance plan

If you already have a maintenance plan, you can recreate it on Commonview by **manually entering your existing tasks**.

This approach ensures your plan remains accurate while taking full advantage of forecasting, provisions, and contribution calculations.

How the import works

At this stage, importing an existing plan is done by **creating tasks one by one** from the [Tasks & Costs](#) page.

For each task in your existing plan, you should:

1. Create a new task on Commonview
2. Enter the task details (frequency, next due date, cost, etc.)
3. Set the [Funding status of upcoming work](#)

Although this requires some initial setup, it ensures your financial projections remain consistent with your historical funding.

Recreating tasks from your existing plan

When creating each task:

- Match the **task type** (servicing, repair, or end-of-life replacement)
- Use the **same frequency** as your existing plan
- Set the **next due date** to the next scheduled occurrence
- Enter the **current or future expected cost**

Repeat this process for all tasks in your plan.

Choosing the correct funding status

While importing an existing plan, special attention should be paid to the **Funding status of upcoming work**.

If the task has been **correctly funded so far** under your existing plan, we recommend selecting:

→ ***Partially funded so far***

This tells the system that:

- Contributions have already been collected in past years
- There is **no need to catch up** on missing funding
- Only the remaining provisions will be secured over future years

As a result, your future contributions will stay aligned with your existing plan, rather than increasing unexpectedly.

When to use “Not funded yet”

Choose **Not funded yet** only if:

- The task has **not been provisioned for previously**, or
- You want future years to **fully fund the upcoming expense**

This option will increase future contributions, as Commonview assumes no funds have been collected so far.

Key tips for a smooth import

- Take your time — accuracy here leads to better forecasts later
 - Focus on **next due dates**, not historical ones
 - Approved years are treated as fixed, so ensure funding status reflects reality
 - You can always review and adjust tasks before submitting a budget for approval
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Key points

Importing an existing maintenance plan means **recreating your tasks thoughtfully**, not starting from zero.

By selecting **“Partially funded so far”** where appropriate, you ensure the system respects the funding already in place and produces a maintenance plan that reflects your building’s real financial position.

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