

## RETAIL PREVENTIVE MAINTENANCE TEMPLATE

# Preventive Maintenance Checklist

Plan recurring maintenance, verify asset condition, test critical systems, prevent avoidable breakdowns, and close every service task with evidence.

STORE / LOCATION

CHECKLIST DATE

REVIEWER

APPROVER

## 1. Preventive maintenance program setup and asset governance

### 1 Confirm the location, checklist date, reviewer, facilities owner, and final approver.

CRITICAL

METADATA + SIGN-OFF

NAME | Enter

TIME | :\_:\_

SIGNATURE | Sign

 **Execution tip:** Use named owners so overdue tasks and unresolved defects always have clear accountability.

### 2 Verify the asset register includes current asset IDs, locations, categories, models, serial numbers, and criticality ratings.

CRITICAL

ASSET REGISTER REVIEW

Current

Incomplete

Missing / expired

Attach record

 **Execution tip:** Sample physical asset tags against the register instead of relying only on spreadsheet completeness.

### 3 Confirm each maintainable asset has an approved preventive maintenance interval based on risk, usage, and manufacturer guidance.

SERVICE INTERVAL VERIFICATION

☐ Complete

☐ Incomplete

☐ N/A

Add evidence

 **Execution tip:** Document the source of each interval, such as regulation, warranty, manufacturer guidance, or internal policy.

### 4 Review recent failures, repeat repairs, missed services, downtime, and safety incidents before planning the maintenance cycle.

CRITICAL

RECORD REVIEW

Current

Incomplete

Missing / expired

Attach record

 **Execution tip:** Prioritize recurring failures because they may indicate that the current maintenance interval or task is ineffective.

### 5 Identify critical assets whose failure could affect safety, compliance, product quality, security, or store trading.

CRITICAL

RISK PRIORITY

Low

Medium

High / critical

Create action

 **Execution tip:** Assign criticality before setting SLAs so scarce maintenance resources are directed to the highest operational risk.

### 6 Capture the checklist start time, geo-location, and an approved reference photo of the location or plant area.

GEO-LOCATION + TIMESTAMP + PHOTO

Good condition

Monitor

Action required

Add live photo

 **Execution tip:** Use live evidence to verify the maintenance review was completed at the assigned location.

## 2. Maintenance schedule, work planning, and resource readiness

- 7 Compare all due preventive maintenance tasks with the approved daily, weekly, monthly, quarterly, and annual schedule.

CRITICAL

SCHEDULE MATRIX

| Finding | Owner | Priority | Due | Evidence |
|---------|-------|----------|-----|----------|
|         |       |          |     |          |

 **Execution tip:** Review both upcoming and overdue tasks so work can be planned before it disrupts store operations.

- 8 Confirm every scheduled task has an asset, task description, frequency, due date, owner, expected duration, and completion standard.

SCHEDULE DETAIL CHECK

☐ Complete
 ☒ Incomplete
 ☐ N/A
 [Add evidence](#)

 **Execution tip:** Avoid generic entries such as service equipment. Specify the exact asset and required maintenance activity.

- 9 Verify maintenance windows are planned around peak trading, deliveries, staff availability, safety controls, and required shutdowns.

PLANNING CHECKLIST

☐ Complete
 ☒ Incomplete
 ☐ N/A
 [Add evidence](#)

 **Execution tip:** Coordinate planned isolation with store teams early to prevent unapproved work during trading hours.

- 10 Confirm required tools, test equipment, PPE, permits, access equipment, and replacement parts are available before work begins.

CRITICAL

RESOURCE READINESS

☐ Complete
 ☒ Incomplete
 ☐ N/A
 [Add evidence](#)

 **Execution tip:** Check calibration and condition of measuring equipment, not only whether it is present.

- 11 Verify internal technicians and external vendors have the required competence, authorization, and site access.

CRITICAL

COMPETENCE + VENDOR CHECK

Current
Incomplete
Missing / expired
[Attach record](#)

 **Execution tip:** Match the planned work to the technician's certification, induction, and permit requirements.

- 12 Confirm contingency plans are available for delays, asset isolation, failed testing, unavailable parts, and emergency escalation.

CRITICAL

CONTINGENCY PLAN

| Finding | Owner | Priority | Due | Evidence |
|---------|-------|----------|-----|----------|
|         |       |          |     |          |

 **Execution tip:** Define who can approve temporary operation and what controls are required until permanent work is completed.

### 3. Exterior, structure, doors, and building fabric

- 13 Inspect roofs, gutters, downpipes, canopies, facades, signage supports, and weather seals for preventive maintenance needs.

CONDITION + PHOTO

Good condition

Monitor

Action required

Add live photo

 Execution tip: Look for early signs of corrosion, movement, blocked drainage, seal failure, or water staining before major damage develops.

- 14 Check exterior walls, expansion joints, sealants, paint, cladding, and structural interfaces for cracking or deterioration.

CRITICAL

CONDITION ASSESSMENT

Good condition

Monitor

Action required

Add live photo

 Execution tip: Mark the exact location and size of cracks so future inspections can confirm whether deterioration is progressing.

- 15 Inspect floors, tiles, thresholds, ramps, stairs, mats, and handrails for wear that requires planned repair.

CRITICAL

WALKTHROUGH CHECKLIST

☐ Complete

☐ Incomplete

☐ N/A

Add evidence

 Execution tip: Record minor defects before they become slip, trip, accessibility, or customer-safety risks.

- 16 Service entrance doors, automatic doors, shutters, closers, hinges, locks, and panic hardware according to schedule.

CRITICAL

FUNCTIONAL TEST + SERVICE DATE

Current

Incomplete

Missing / expired

Attach record

 Execution tip: Complete a full open and close cycle and record abnormal noise, resistance, delay, or failed safety sensors.

- 17 Inspect windows, glazing, mirrors, display glass, frames, films, and sealants for movement, damage, or moisture ingress.

VISUAL INSPECTION + PHOTO

Good condition

Monitor

Action required

Add live photo

 Execution tip: Use close and wide photos so the defect and its store location are both clear.

- 18 Confirm completed building repairs have permanent finishes, safe edges, correct weatherproofing, and documented closure evidence.

CLOSURE VERIFICATION

Verified

Retest needed

Failed closure

Add closure proof

 Execution tip: Do not close a task only because the area looks improved. Verify the repair against the original defect and standard.

## 4. Electrical systems, lighting, and backup power

- 19 Inspect electrical panels, breakers, isolators, labels, clearances, locks, and signs of heat, moisture, or damage. CRITICAL CRITICAL INSPECTION + PHOTO

Good condition Monitor Action required Add live photo

 Execution tip: Escalate heat damage, burning odor, water ingress, exposed conductors, and missing covers immediately.

- 20 Test general, task, emergency, exterior, display, and security lighting against the preventive maintenance plan. CRITICAL FUNCTIONAL TEST

Pass Partial Fail RESULT | Enter

 Execution tip: Record failed fittings by exact zone and confirm the replacement specification matches the approved standard.

- 21 Inspect sockets, plugs, power strips, extension leads, visible cables, chargers, and equipment connections for deterioration. CRITICAL CONDITION CHECKLIST

☐ Complete ☐ Incomplete ☐ N/A Add evidence

 Execution tip: Remove damaged portable electrical equipment from service until it has been repaired and retested.

- 22 Verify residual-current devices, ground-fault devices, surge protection, and other electrical safety devices are tested on schedule. CRITICAL TEST RECORD + RESULT

Current Incomplete Missing / expired Attach record

 Execution tip: Record the test date, device reference, result, tester, and any corrective action raised.

- 23 Test generators, UPS units, batteries, automatic transfer systems, fuel levels, and backup-power alarms. CRITICAL READING + FUNCTIONAL TEST

READING | Enter UNIT | Select Add live photo

 Execution tip: Run the approved test under realistic load where possible and record runtime, alarms, and recovery behavior.

- 24 Confirm electrical preventive maintenance records, thermography, inspection certificates, and corrective actions are current. DOCUMENT VERIFICATION

Current Incomplete Missing / expired Attach record

 Execution tip: Link each report to the correct panel or asset and verify that identified defects were closed.

## 5. HVAC, ventilation, refrigeration, and environmental control

- 25 Confirm HVAC units start, run, stop, and maintain the approved temperature across customer and staff areas.

CRITICAL

FUNCTIONAL TEST + TEMPERATURE

READING | Enter

UNIT | Select

Add live photo

 Execution tip: Check more than one zone because a single thermostat reading may hide uneven comfort or airflow.

- 26 Inspect and clean filters, grilles, diffusers, coils, drain pans, condensate lines, and accessible ductwork as scheduled.

SERVICE ACTIVITY + PHOTO

☐ Complete

☐ Incomplete

☐ N/A

Add evidence

 Execution tip: Photograph condition before and after cleaning when contamination or blockage is material.

- 27 Check thermostats, sensors, controllers, timers, remote monitoring, and alarm notifications for correct operation.

CRITICAL

CONTROL TEST

Pass

Partial

Fail

RESULT | Enter

 Execution tip: Compare displayed values with a calibrated reference reading to identify sensor drift.

- 28 Inspect HVAC and refrigeration equipment for unusual noise, vibration, leaks, odor, icing, corrosion, or overheating.

CRITICAL

CONDITION + OBSERVATION

Good condition

Monitor

Action required

Add live photo

 Execution tip: Record the operating state and duration when the symptom occurs so technicians can reproduce the fault.

- 29 Verify refrigerators, freezers, cold rooms, and temperature-controlled assets remain within approved ranges.

CRITICAL

TEMPERATURE READING + LOG

READING | Enter

UNIT | Select

Add live photo

 Execution tip: Take a direct product or calibrated reference reading when display values appear inconsistent.

- 30 Review service dates, refrigerant records, leak checks, recurring alarms, energy use, and overdue corrective work.

SERVICE RECORD REVIEW

Current

Incomplete

Missing / expired

Attach record

 Execution tip: Use recurring alarms and rising energy consumption as early indicators of declining asset performance.

## 6. Plumbing, water, drainage, and sanitation systems

31 Inspect visible pipework, valves, taps, fixtures, tanks, pumps, and joints for leaks, corrosion, movement, or damage.

CRITICAL

CONDITION + LIVE PHOTO

Good condition

Monitor

Action required

Add live photo

 Execution tip: Check during active use because intermittent leaks may not be visible when fixtures are idle.

32 Test water pressure, hot-water temperature, supply continuity, and shut-off valves against the approved standard.

CRITICAL

MEASUREMENT + FUNCTIONAL TEST

READING | | Enter

UNIT | | Select

Add live photo

 Execution tip: Record values at the point of use and identify the exact fixture or supply zone.

33 Inspect sinks, washrooms, staff facilities, floor drains, grease systems, and utility areas for drainage performance.

FUNCTIONAL TEST

Pass

Partial

Fail

RESULT | | Enter

 Execution tip: Run sufficient water to confirm drainage capacity, odor control, and absence of backflow.

34 Verify drains, traps, gullies, strainers, and accessible waste pipes are cleaned at the planned frequency.

CLEANING RECORD + CONDITION

Current

Incomplete

Missing / expired

Attach record

 Execution tip: Compare cleaning records with current odor, blockage, pest, and overflow indicators.

35 Check water-treatment, filtration, dosing, pump, and monitoring equipment where installed.

CRITICAL

EQUIPMENT TEST + READING

READING | | Enter

UNIT | | Select

Add live photo

 Execution tip: Record consumable condition, pressure or quality readings, alarm status, and next replacement date.

36 Confirm water leaks, blocked drains, hygiene risks, and recurring plumbing defects have work orders and verified closure.

CRITICAL

ACTION REVIEW

| Finding | Owner | Priority | Due | Evidence |
|---------|-------|----------|-----|----------|
|         |       |          |     |          |

 Execution tip: Track recurring leaks to root cause instead of repeatedly closing temporary repairs.

## 7. Fire, life safety, accessibility, and security systems

- 37 Verify fire alarm panels, detectors, call points, sounders, visual alarms, and fault signals are tested on schedule. CRITICAL SYSTEM TEST + RECORD

Current
Incomplete
Missing / expired
Attach record

 Execution tip: Record any isolated device, panel fault, zone impairment, or temporary control immediately.

- 38 Inspect extinguishers, hose reels, blankets, suppression systems, and inspection tags for condition and service status. CRITICAL EQUIPMENT CHECKLIST + SERVICE DATE

Current
Incomplete
Missing / expired
Attach record

 Execution tip: Check access, mounting, seals, gauges, tamper evidence, and the next due date.

- 39 Test emergency lighting, exit signs, evacuation doors, panic hardware, and route visibility. CRITICAL FUNCTIONAL TEST + PHOTO

Good condition
Monitor
Action required
Add live photo

 Execution tip: Complete the approved duration or function test and record failed units by exact location.

- 40 Inspect lifts, escalators, platform lifts, ramps, automatic doors, assistance devices, and accessibility controls. CRITICAL FUNCTIONAL TEST + SERVICE DATE

Current
Incomplete
Missing / expired
Attach record

 Execution tip: Confirm both normal operation and safety-device response, not only visible condition.

- 41 Test intrusion alarms, panic devices, access control, intercoms, emergency communication, and security-related maintenance points. CRITICAL SECURITY SYSTEM TEST

Pass
Partial
Fail
RESULT | Enter

 Execution tip: Coordinate tests to avoid false escalation and confirm alerts reach the intended monitoring contact.

- 42 Confirm statutory certificates, service reports, impairment plans, emergency contacts, and required contractor details are current. CRITICAL DOCUMENT VERIFICATION

Current
Incomplete
Missing / expired
Attach record

 Execution tip: Treat expired certificates or unapproved impairment as an open compliance risk until resolved.

## 8. Store fixtures, customer equipment, and operational assets

- 43 Inspect shelving, gondolas, display tables, counters, wall fixtures, and storage units for loose parts, wear, or instability. CRITICAL CONDITION + STABILITY CHECK

Good condition Monitor Action required Add live photo

 Execution tip: Apply an approved stability check and record damaged fixings, overloading, or sharp edges.

- 44 Service POS hardware, printers, scanners, payment devices, kiosks, queue systems, and customer-use technology. FUNCTIONAL TEST + ASSET ID

Pass Partial Fail RESULT | Enter

 Execution tip: Test the complete transaction or operating workflow instead of only powering the device on.

- 45 Inspect fitting rooms, mirrors, seating, trolleys, baskets, lockers, and customer-use equipment for safe condition. AREA CHECKLIST + PHOTO

Complete Incomplete N/A Add evidence

 Execution tip: Include movable items and hidden fixings that may be missed during routine cleaning.

- 46 Check ladders, steps, hand tools, cleaning machines, vacuum cleaners, and portable equipment for preventive maintenance needs. CRITICAL EQUIPMENT CONDITION + TAG

Good condition Monitor Action required Add live photo

 Execution tip: Verify inspection tags, guards, cables, wheels, brakes, and storage condition.

- 47 Confirm kitchen, food-service, water-heating, coffee, or specialist operational equipment is maintained where applicable. CRITICAL SERVICE CHECKLIST

Complete Incomplete N/A Add evidence

 Execution tip: Follow manufacturer cleaning, descaling, lubrication, and safety-test requirements for each asset.

- 48 Verify repaired assets have been function-tested, cleaned, returned to service, and updated in the asset history. REPAIR VERIFICATION + SIGN-OFF

NAME | Enter TIME | :\_ SIGNATURE | Sign

 Execution tip: Require the user or store owner to confirm the asset works in normal operating conditions.

## 9. Stockroom, receiving, waste, and material-handling equipment

49 Inspect stockroom racking, shelving, cages, pallet locations, and storage equipment for damage, movement, or overload.

CRITICAL

RACKING INSPECTION + PHOTO

Good condition

Monitor

Action required

Add live photo

Execution tip: Record upright, beam, anchor, guard, and load-sign damage separately so repairs are correctly scoped.

50 Service ladders, steps, trolleys, pallet jacks, lifting aids, dock equipment, and receiving tools according to schedule.

CRITICAL

EQUIPMENT CHECKLIST + SERVICE DATE

Current

Incomplete

Missing / expired

Attach record

Execution tip: Remove equipment from use when brakes, wheels, handles, guards, or load components are defective.

51 Check loading doors, dock seals, shutters, barriers, lighting, and communication devices for reliable operation.

CRITICAL

FUNCTIONAL TEST

Pass

Partial

Fail

RESULT | Enter

Execution tip: Test the full receiving workflow and confirm vehicle and pedestrian separation controls remain effective.

52 Inspect compactors, balers, waste bins, recycling equipment, and waste-room ventilation and drainage.

CRITICAL

CONDITION + SAFETY TEST

Good condition

Monitor

Action required

Add live photo

Execution tip: Verify guards, interlocks, emergency stops, cleanliness, and contractor collection arrangements.

53 Confirm pest-proofing, door seals, traps, drainage, waste containment, and cleaning equipment are maintained.

PEST AND HYGIENE CONTROL CHECK

Compliant

Partially compliant

Non-compliant

N/A

Execution tip: Link physical defects such as gaps or leaks to pest trends and sanitation findings.

54 Review repeated defects, missed servicing, misuse, overload, and operator-training gaps affecting back-of-house equipment.

ROOT-CAUSE REVIEW

Compliant

Partially compliant

Non-compliant

N/A

Execution tip: Do not treat every failure as a repair issue. Check whether process, training, or capacity is contributing.

## 10. Work orders, vendor performance, closure, and management sign-off

55 Confirm every overdue or failed preventive maintenance task has a work order, owner, priority, and due date.

CRITICAL

WORK-ORDER MATRIX

| Finding | Owner | Priority | Due | Evidence |
|---------|-------|----------|-----|----------|
|         |       |          |     |          |

 Execution tip: Create one traceable action for each distinct asset and failure so closure evidence is unambiguous.

56 Prioritize work using safety, compliance, operational impact, asset criticality, failure likelihood, and temporary controls.

CRITICAL

RISK MATRIX

| Finding | Owner | Priority | Due | Evidence |
|---------|-------|----------|-----|----------|
|         |       |          |     |          |

 Execution tip: Use defined priority criteria so similar failures receive consistent SLAs across locations.

57 Verify external vendors meet response times, attendance commitments, permit rules, service quality, and documentation standards.

VENDOR PERFORMANCE REVIEW

Current Incomplete Missing / expired Attach record

 Execution tip: Compare invoice or attendance records with actual arrival, completion, and first-time-fix performance.

58 Confirm replaced parts, consumables, warranties, test results, service notes, and asset-history updates are recorded.

SERVICE RECORD COMPLETION

Current Incomplete Missing / expired Attach record

 Execution tip: Capture part numbers and warranty details so repeat failures and future claims can be managed.

59 Verify completed work through functional testing, live closure evidence, user confirmation, and removal of temporary controls.

CRITICAL

CLOSURE VERIFICATION + PHOTO

Good condition Monitor Action required Add live photo

 Execution tip: Close the work order only after the original failure mode has been retested under normal operating conditions.

60 Record the overall preventive maintenance status, open risks, next review date, approve, comments, and signature.

CRITICAL

MANAGEMENT APPROVAL + SIGNATURE

|              |            |                  |
|--------------|------------|------------------|
| NAME   Enter | TIME   _:_ | SIGNATURE   Sign |
|--------------|------------|------------------|

 Execution tip: Summarize overdue critical work separately so leaders can see immediate risk without reading every task.

RUN THIS CHECKLIST DIGITALLY

## Turn every maintenance schedule into verified asset reliability

Use Taqtics to schedule recurring work by location and asset, capture readings and live evidence, create work orders, enforce SLAs, verify closure, and compare recurring failures and vendor performance across stores.

Try the Preventive Maintenance Checklist in Taqtics

Asset schedules Live evidence Meter readings Work orders SLA escalation Reliability dashboards