



# EstateAegis

## The smarter way to manage private residences.

Bring your residences, team and clients together.

**Coastal Residence Care**

Menu Search residences, work and records...

COASTAL Powered by EstateAegis

**COASTAL RESIDENCE CARE**

**Your estate overview**

Property care, upcoming visits and recent updates.

**Action needed** 11

**Residences & Arrivals**

**RESIDENCES**  
2  
View details →

**UPCOMING ARRIVALS**  
1  
View details →

**SUBMITTED ARRIVALS**  
1  
View details →

**Inspections & Service**

**INSPECTION REPORTS**  
1  
View details →

**UPCOMING INSPECTIONS**  
0  
View details →

**WORK ORDERS**  
3  
View details →

**SERVICE REQUESTS**  
1  
View details →

**Work needing attention** 3

**Completed inspection reports** 1

**My profile**

**Notifications**

**Demo Administrator**  
Admin

Sign out

### One connected workspace for private residence care

Coordinate inspections, service work, arrivals and communication under your company's brand.

### A focused client experience

Clients review reports, plan arrivals, request service and respond to approval requests.

### Family access follows the home

Create a family, add residences and invite family members. Removing a linked member suspends that access.

### The household details your team needs

Residence managers, assets, documents, shopping and arrival preparation stay connected to the home.

### Your team, connected

Administrators, staff and vendors have their own accounts, with access relevant to their work.

### Messages in one place

Direct and company-wide conversations keep updates in the app. Email alerts notify recipients of new messages.

### Try the demonstration company

Contact [sales@estateaegis.com](mailto:sales@estateaegis.com) for login information.



## Professional reports. Clear follow-through.

COASTAL

**Coastal Residence Care**  
PRIVATE RESIDENCE INSPECTION

### Ocean Palm Residence

**INSPECTION REPORT**

|                  |                                      |
|------------------|--------------------------------------|
| Family           | Rivera Family                        |
| Inspected by     | Demo Administrator                   |
| Inspection date  | 2026-09-11                           |
| Completed        | Sep 11, 2026, 5:57 PM EDT            |
| Report reference | 00da17cf-4eee-48a8-9999-c75504069964 |

26  
PASS

1  
MONITOR

1  
ATTENTION

Overall condition: Action needed

**Walkthrough checklist**

**Water & Plumbing**

|                                                                                                      |           |
|------------------------------------------------------------------------------------------------------|-----------|
| Exercise main water shutoff valve                                                                    | PASS      |
| Run every sink faucet for 2-3 minutes                                                                | PASS      |
| <b>Run showers and tubs</b><br>Minor leak under the guest bathroom sink. Repair has been scheduled.  | ATTENTION |
| Flush every toilet                                                                                   | PASS      |
| Check under sinks for leaks                                                                          | PASS      |
| <b>Check water heater / mechanical room for leaks</b><br>Recheck filter condition at the next visit. | MONITOR   |

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### Your brand on every report

Your company name and logo lead the PDF. Powered by EstateAegis appears in the footer.

### Color-coded inspection findings

Monitor is yellow; Attention is red. Reports record the inspector and completion time.

### Automatic report delivery

Save the residence's recipient once. Complete and publish starts the report email.

### Turn findings into work

Create linked work from findings and follow its status. Internal notes stay out of client reports.

## Keep service work moving

### Updates stay with the job

Add dated notes and photos. Information requests notify the residence manager and main administrator.

### Approvals before spending

Record client approval or decline against a proposed work amount.

### Assignments through completion

Assign work and review submitted completion. Vendors see the jobs assigned to them.

### Schedules and recurring care

Coordinate staff visits and configure recurring inspections, due work and reminders.

## See how EstateAegis fits your team.

Watch the accompanying video, then contact us for demo access and a guided introduction.

772-237-1382 | [sales@estateaegis.com](mailto:sales@estateaegis.com)