AssetPlanner™

Maintenance Planner Quick Start Guide

AMERESCO ASSET SUSTAINABILITY

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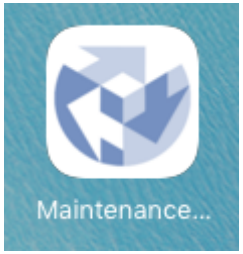
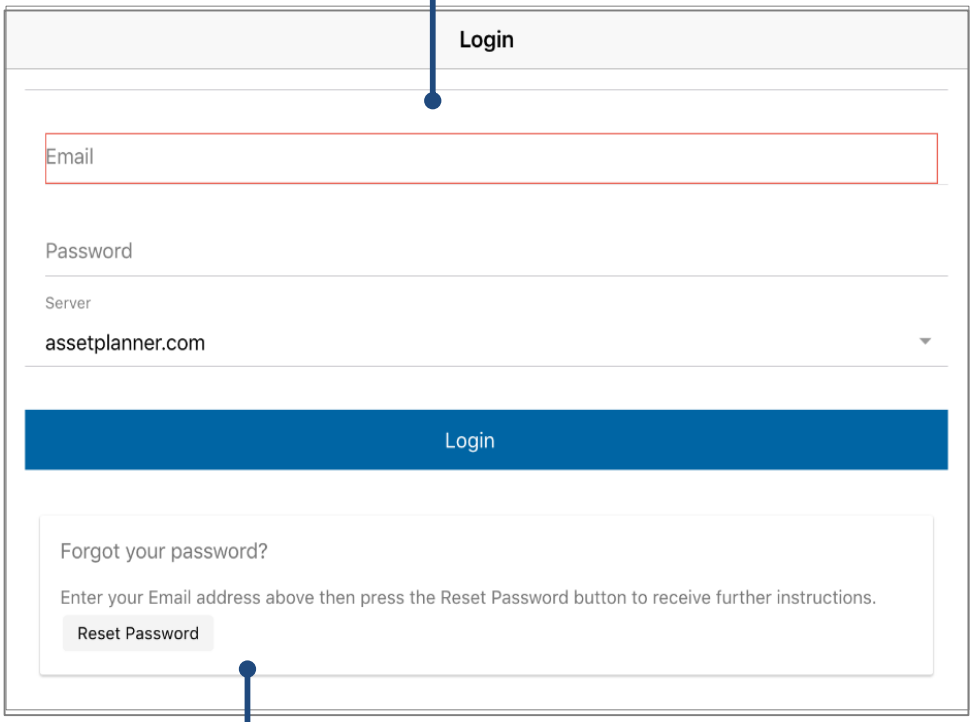
Getting Started:
Login

Login Page

Ensure that you have **MaintenancePlanner™** app downloaded in your device. This application is available on Apple and Android devices.



Enter your **e-mail address** and the **password** provided to you by Ameresco (same login info used on desktop view) and then click **Login**.



Tip: *If you ever forget your password you can click on the "**I forgot my password**" link. You will receive an e-mail with instructions on how to re-set your password.*

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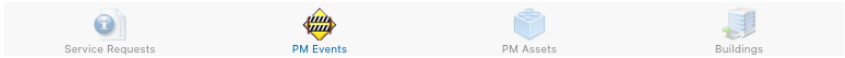
Navigating the App

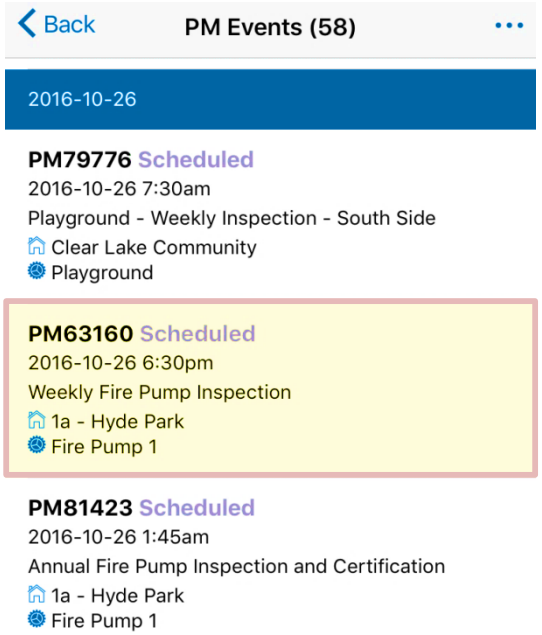
Navigating the App

MaintenancePlanner

MaintenancePlanner allows you to access your AssetPlanner Service Requests, Asset Components, and Asset Classes.

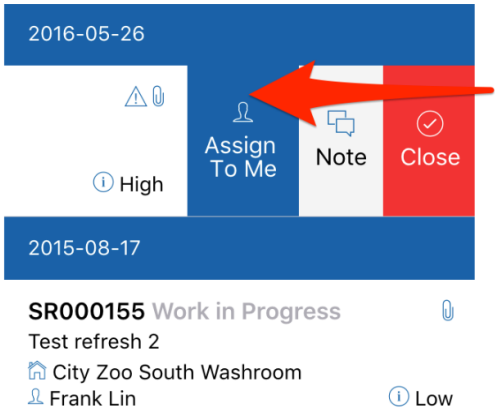


Events and requests assigned to you will appear as a slightly different color on the screen from all other open requests you have access to view.



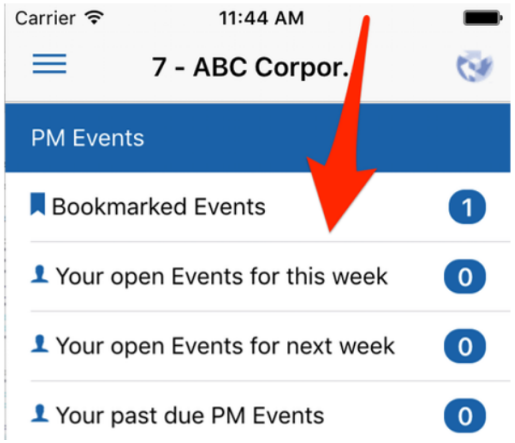
Swipe left/right

When viewing lists, slide an item right for actions and left for bookmarking.



Refresh Stats

On the dashboards, use the pull down gesture to refresh the data at any time.



ICONS DEFINED

- Facility
- Asset
- Category
- Attachment
- Asset Meter(s)
- Notes attached
- Urgent or High Priority
- Pending Approval

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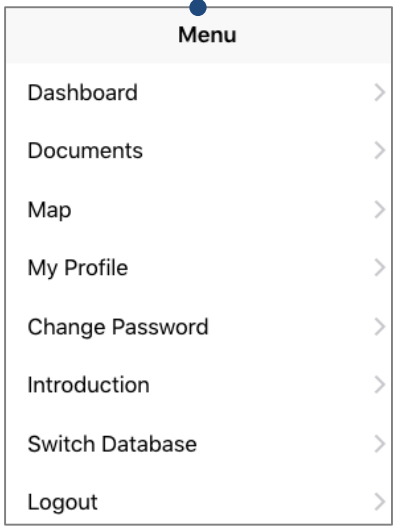
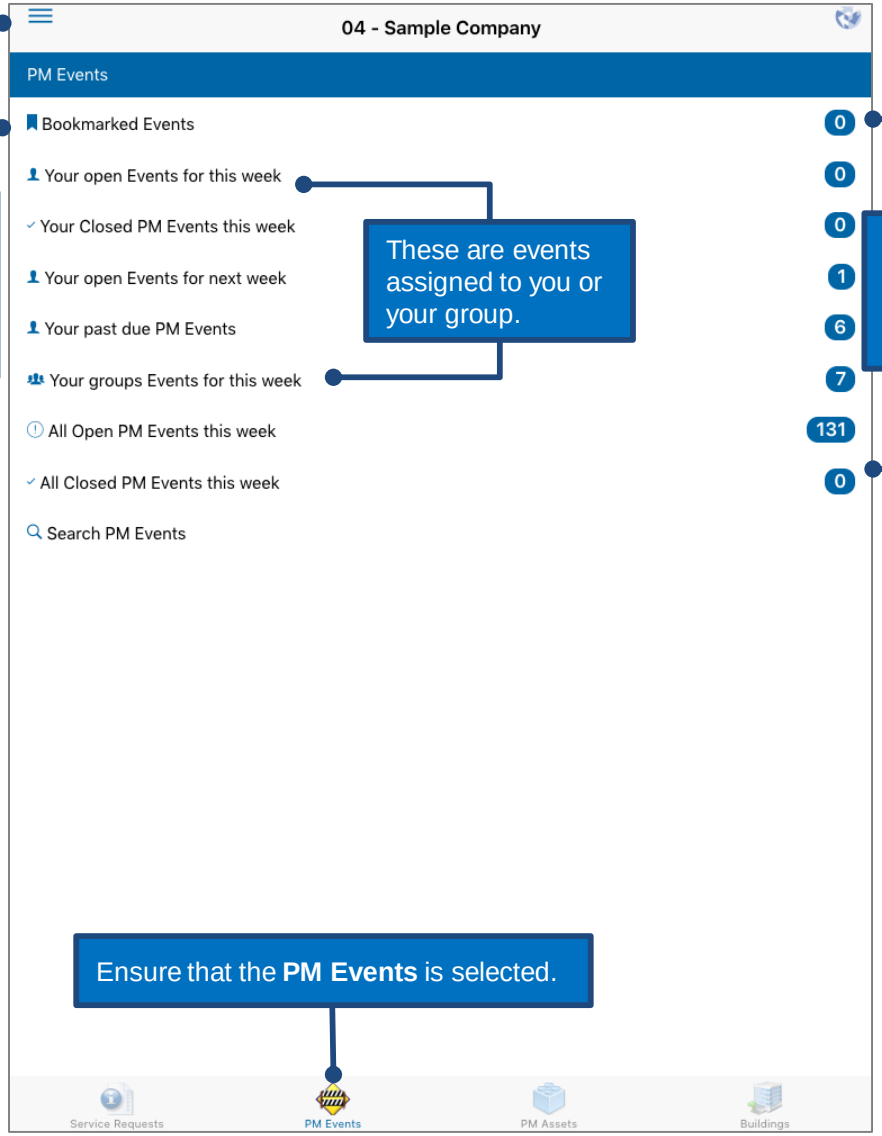
Preventative Maintenance

Preventative Maintenance Home Screen

Select the Menu icon to **Logout**, view **Documents**, **Change Password**, and **Switch Database** *(if you have access to multiple database).*



Any Assets that has been bookmarked will be listed here.



These are events assigned to you or your group.

The numbers on this side indicates how many PM events there are in each section.

Ensure that the **PM Events** is selected.

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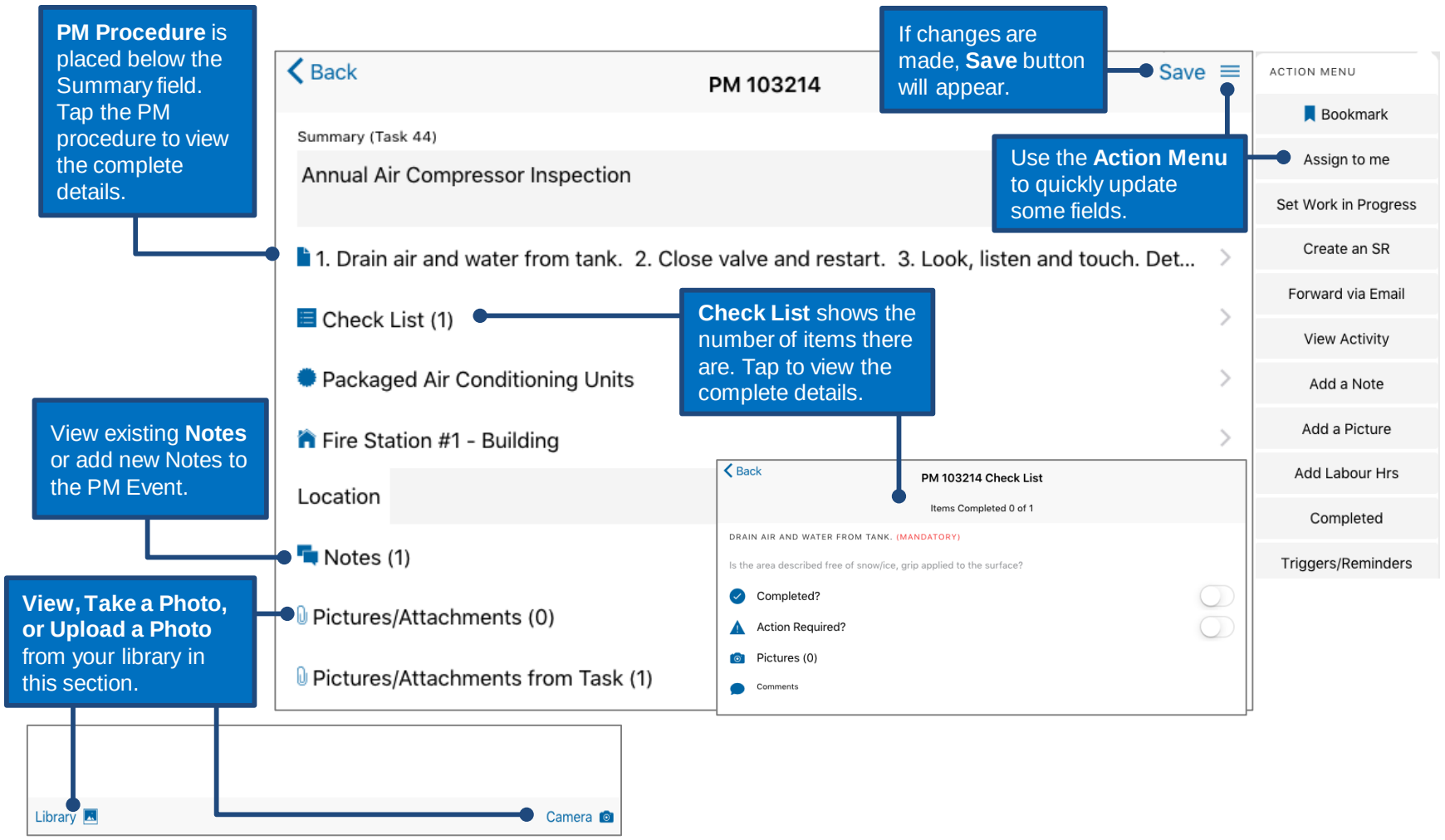
PM Event Page



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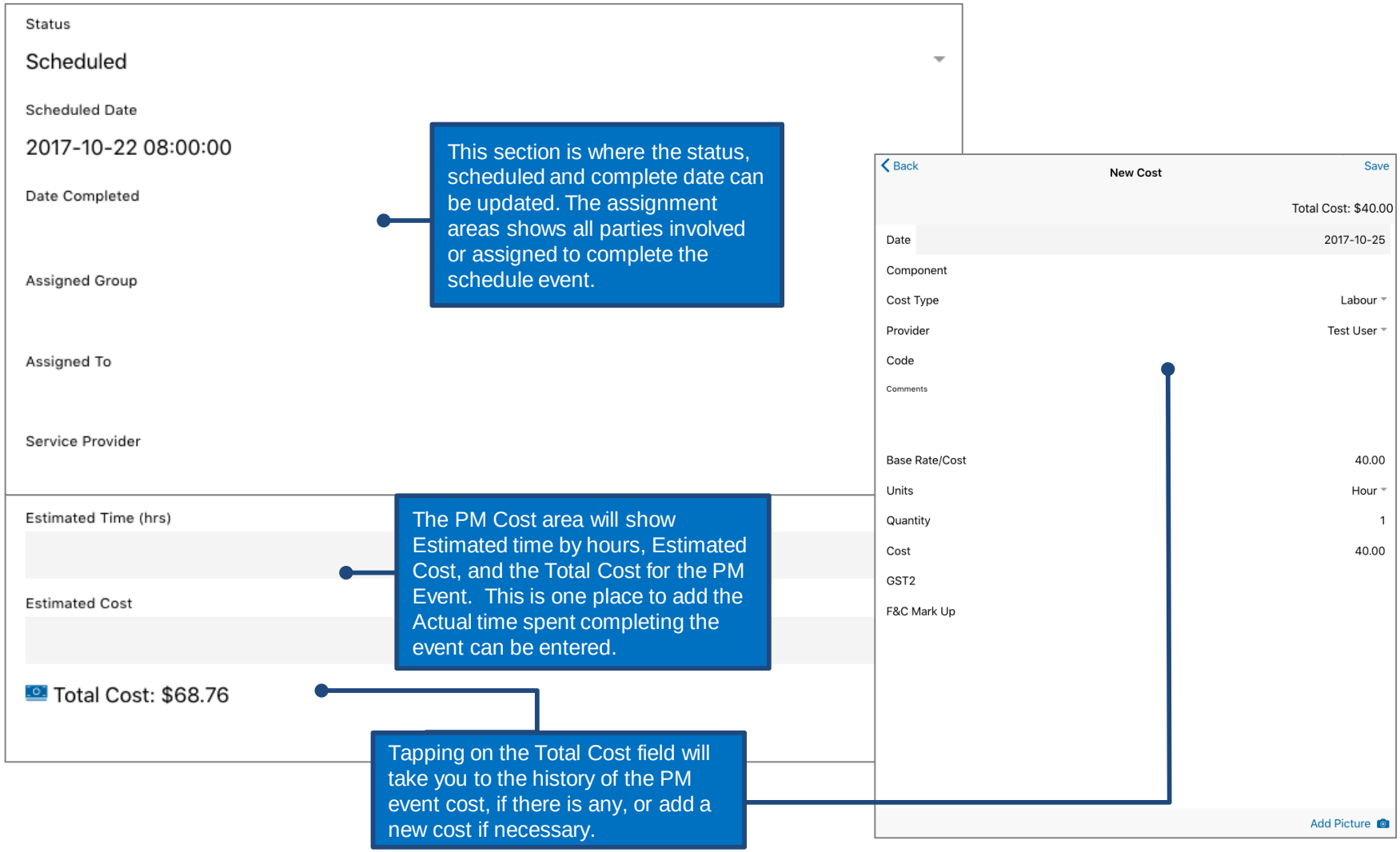
PM Event Page



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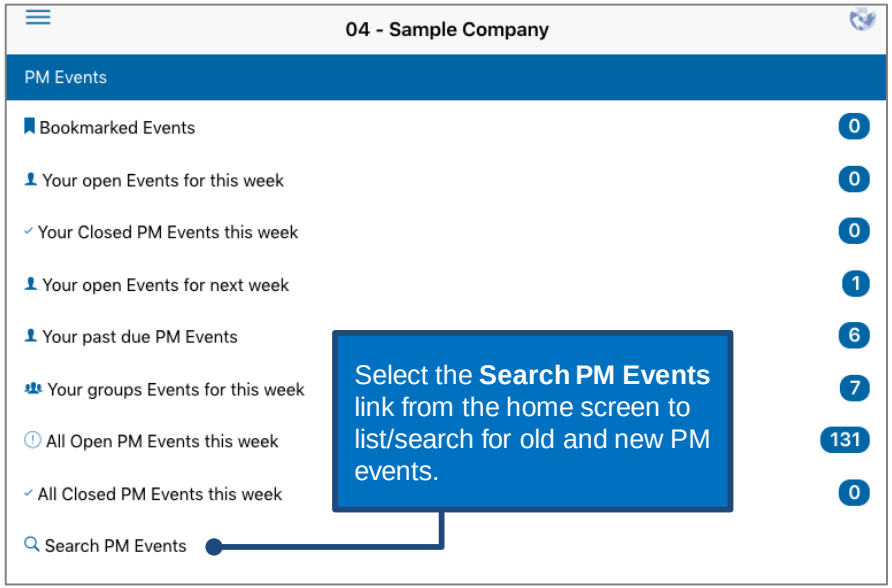
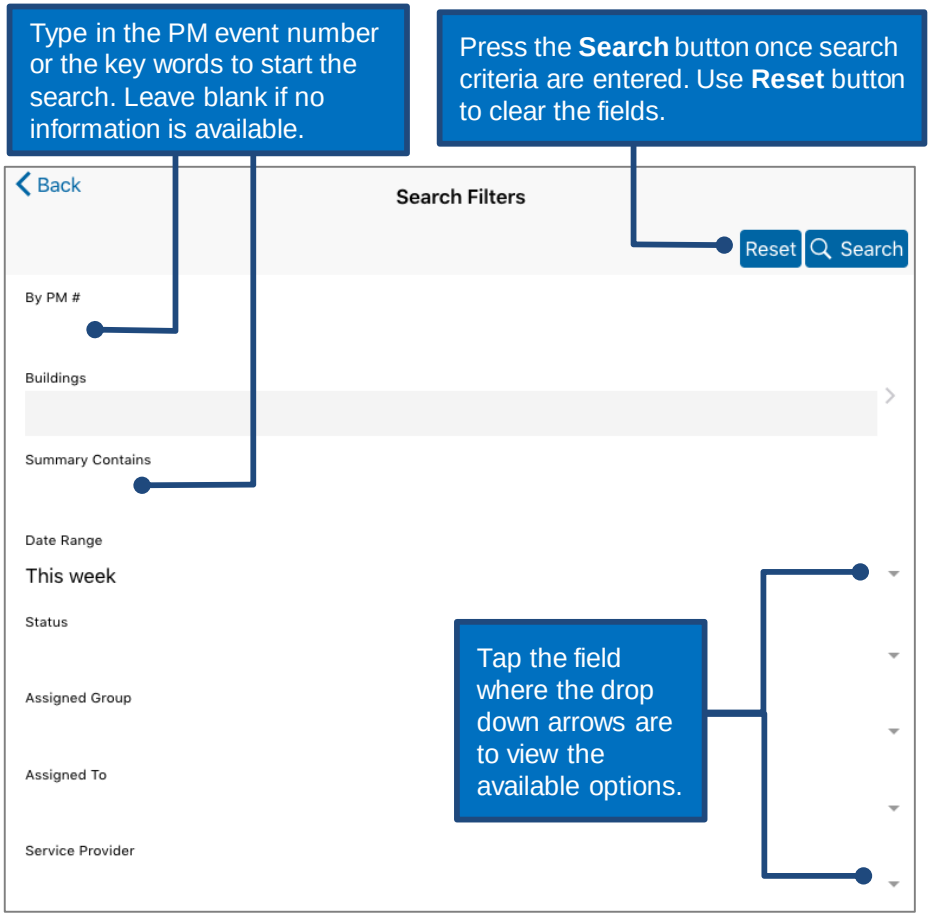
Search PM Events





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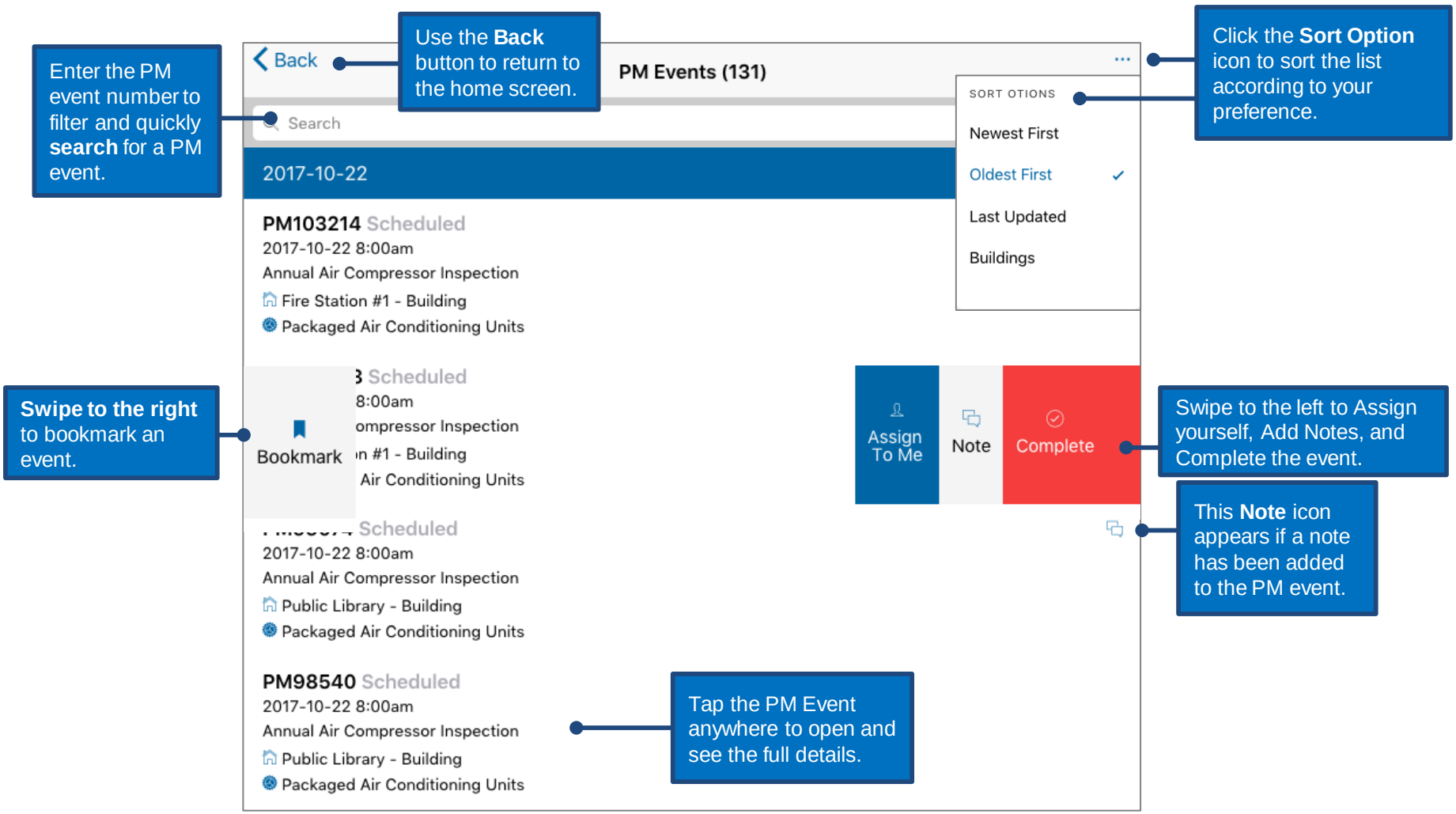
PM Events



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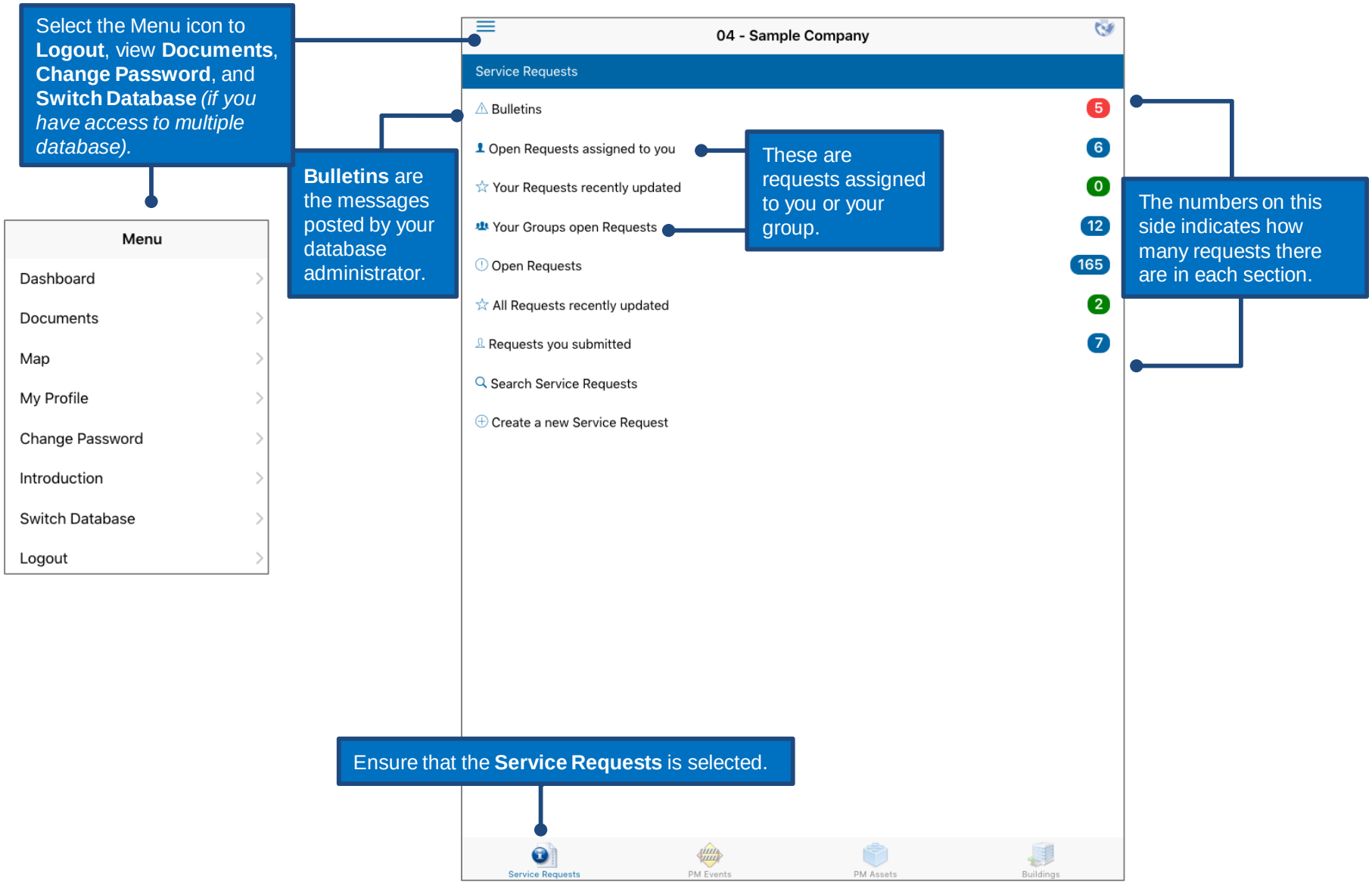
Service Requests

Service Requests Home Screen



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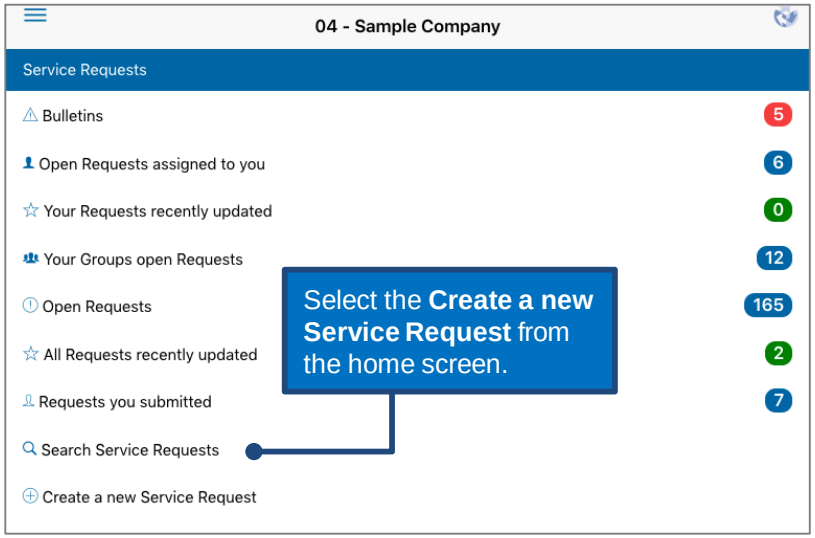
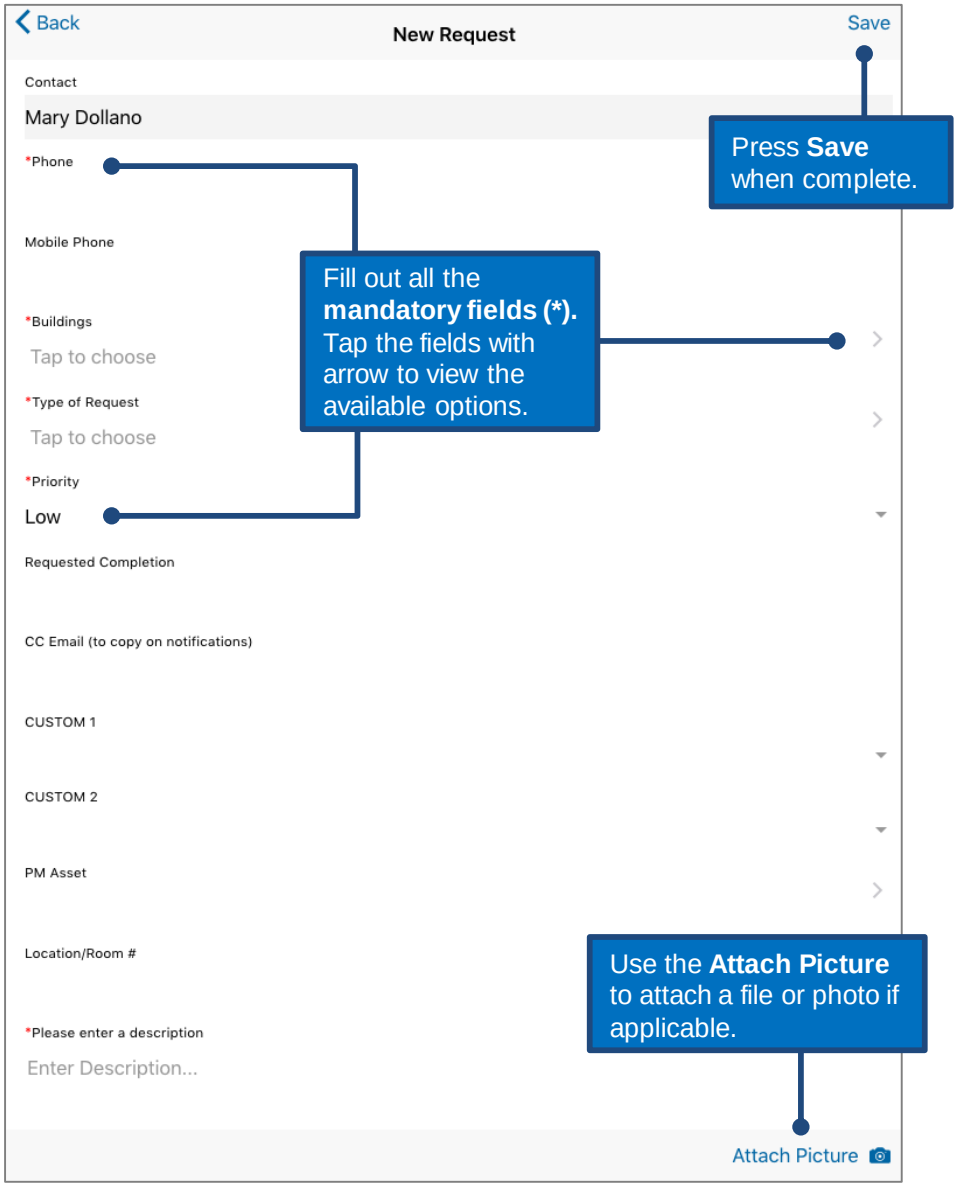
Create a Service Request





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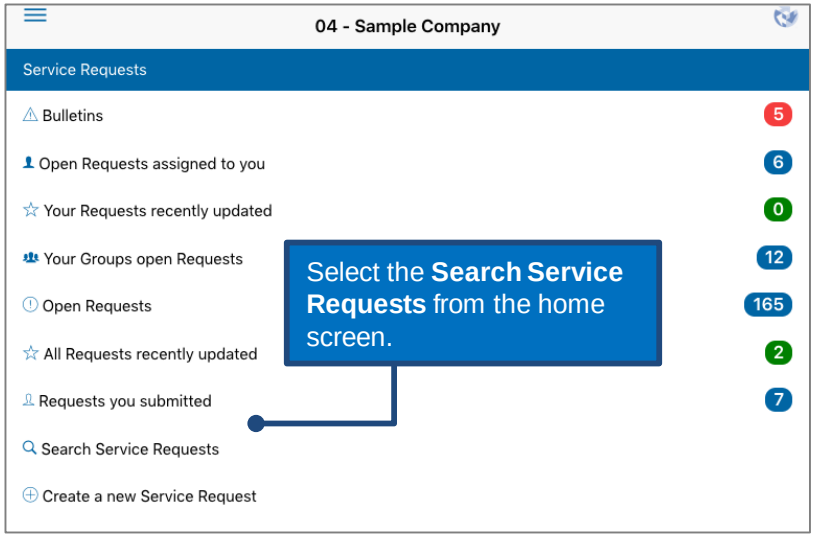
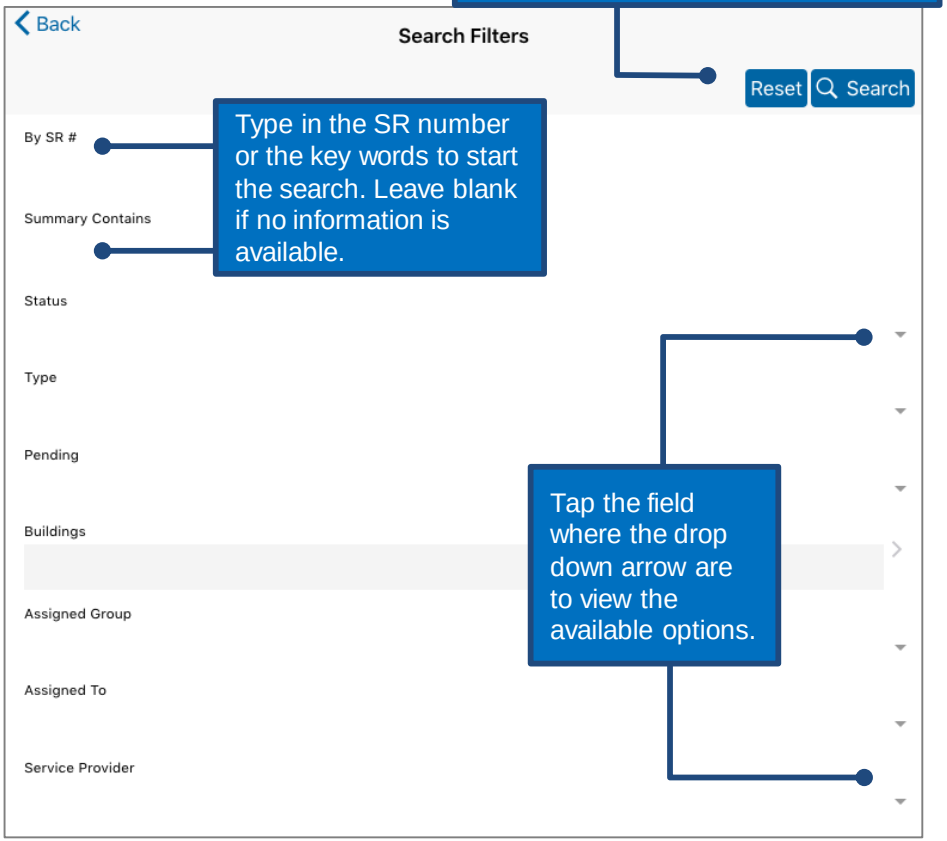
Search Service Request



Select the **Search Service Requests** from the home screen.

Use the **Back** button to return to the home screen.



Press the **Search** button once search criteria are entered. Use **Reset** button to clear the field.

Type in the SR number or the key words to start the search. Leave blank if no information is available.

Tap the field where the drop down arrow are to view the available options.

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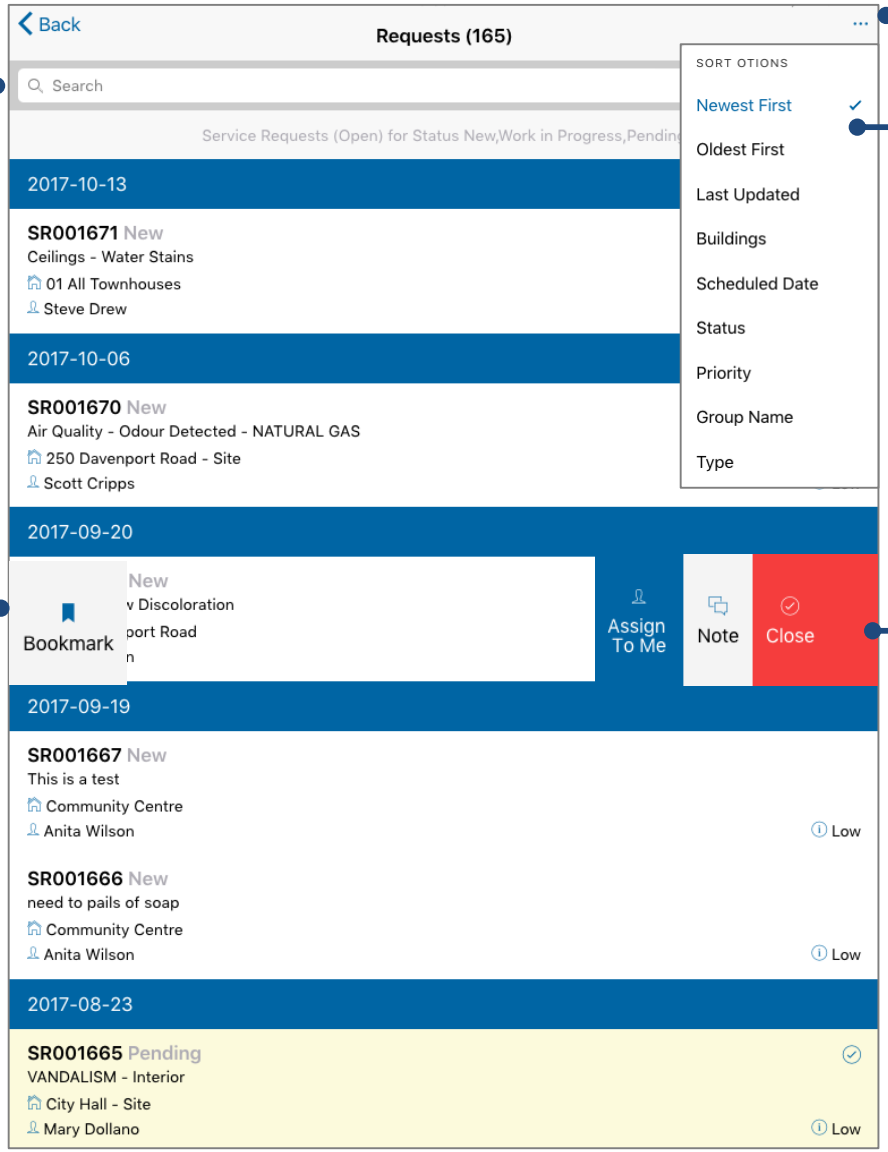
Service Requests

Enter the SR number to filter and quickly **search** for a Service Request.

Click the **Sort Option** icon to sort the list according to your preference.

Swipe to the right to bookmark a SR.

Swipe to the left to Assign to yourself, Add Notes, and Close the request.



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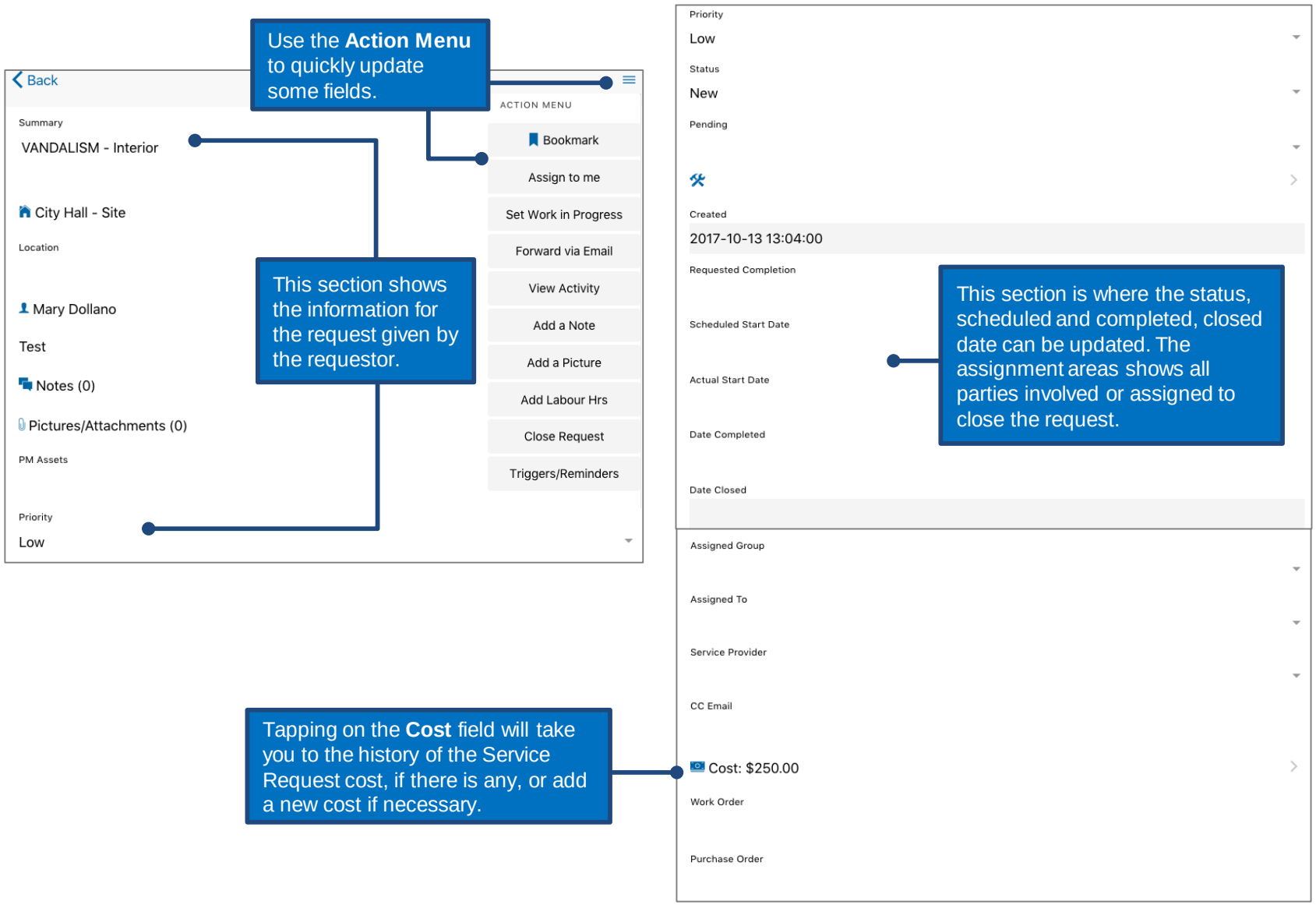
Service Request Page



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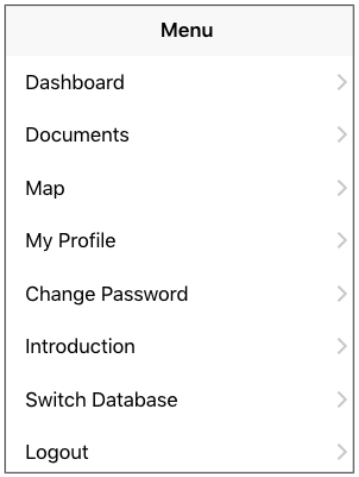
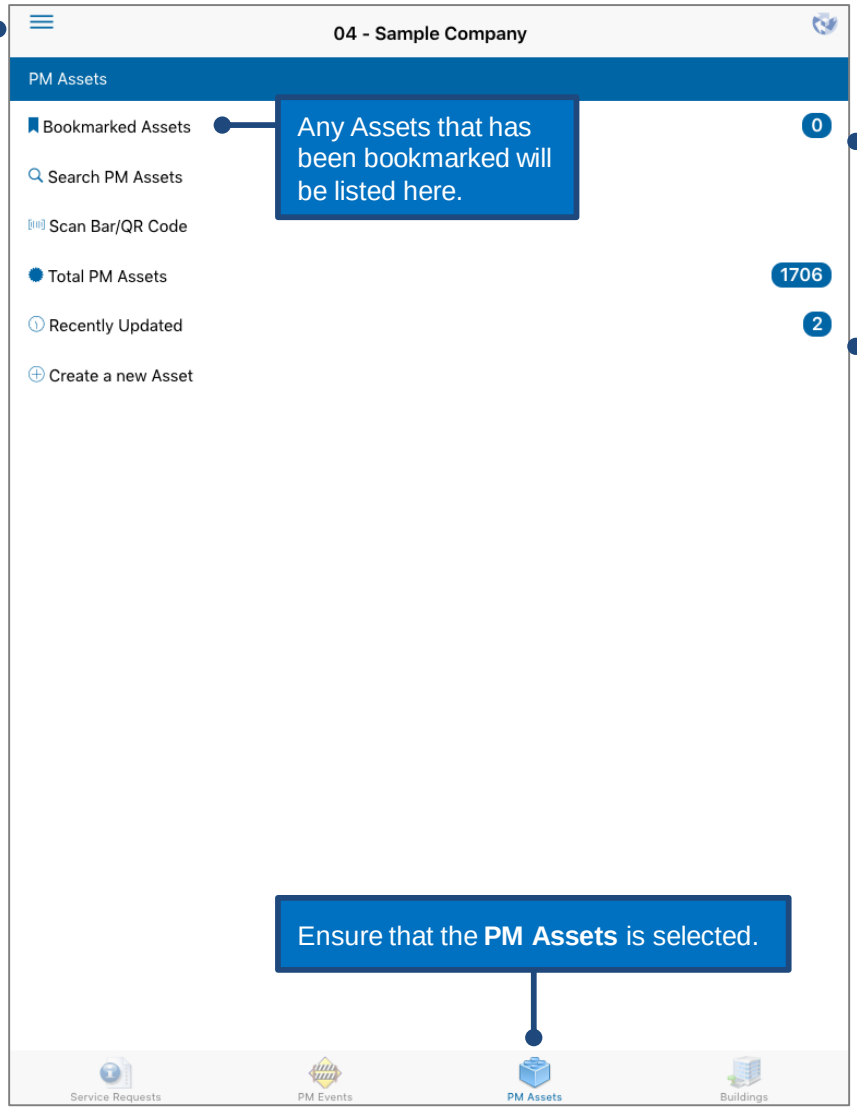
PM Assets

PM Assets Home Screen

Select the Menu icon to **Logout**, view **Documents**, **Change Password**, and **Switch Database** *(if you have access to multiple database).*





Any Assets that has been bookmarked will be listed here.

The numbers on this side indicates how many PM Assets there are in each section.

Ensure that the **PM Assets** is selected.

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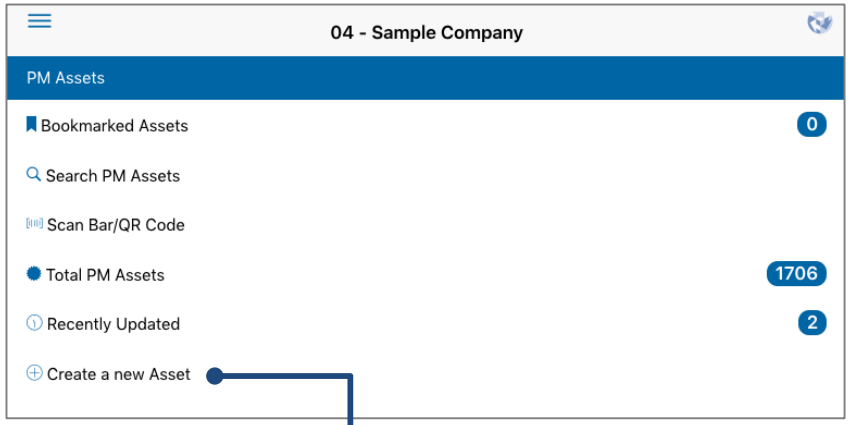
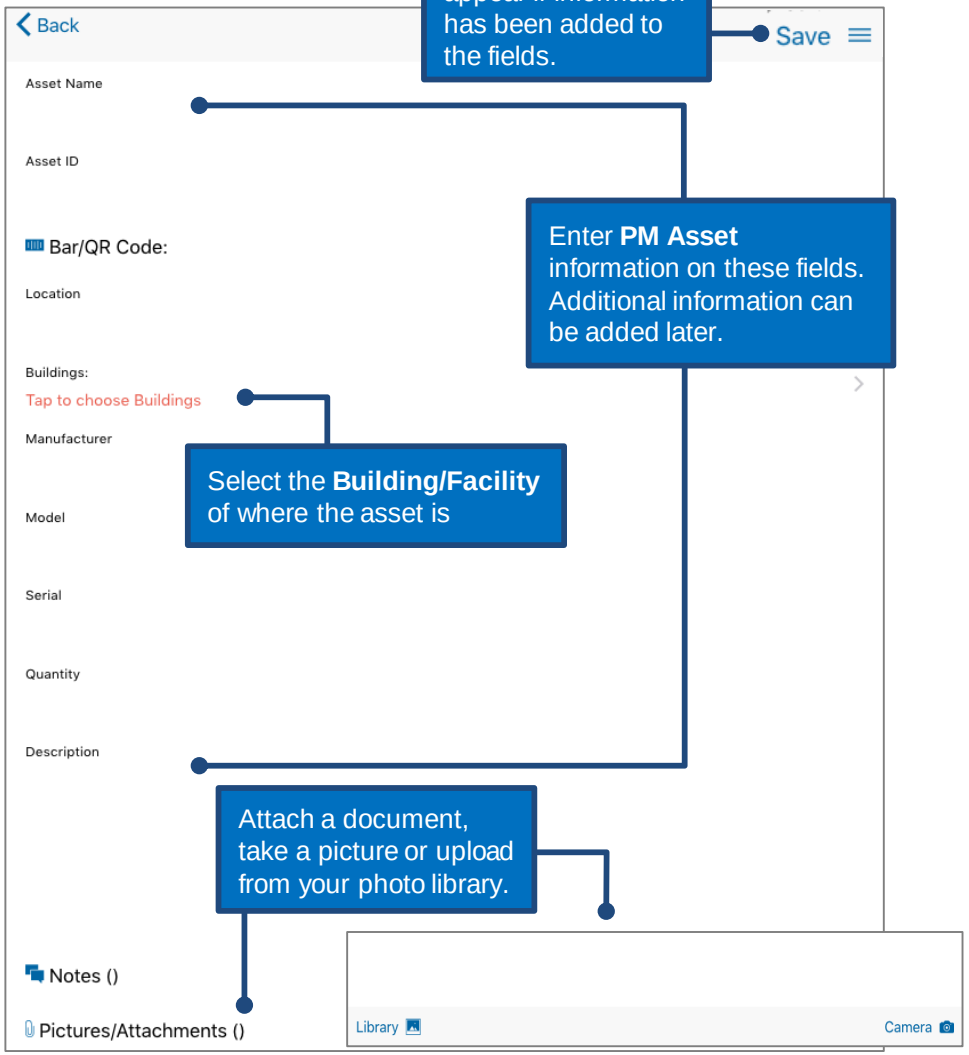
Creating PM Assets



Select **Create a new Asset** from the home screen.



Save button will appear if information has been added to the fields.

Enter **PM Asset** information on these fields. Additional information can be added later.

Select the **Building/Facility** of where the asset is

Attach a document, take a picture or upload from your photo library.

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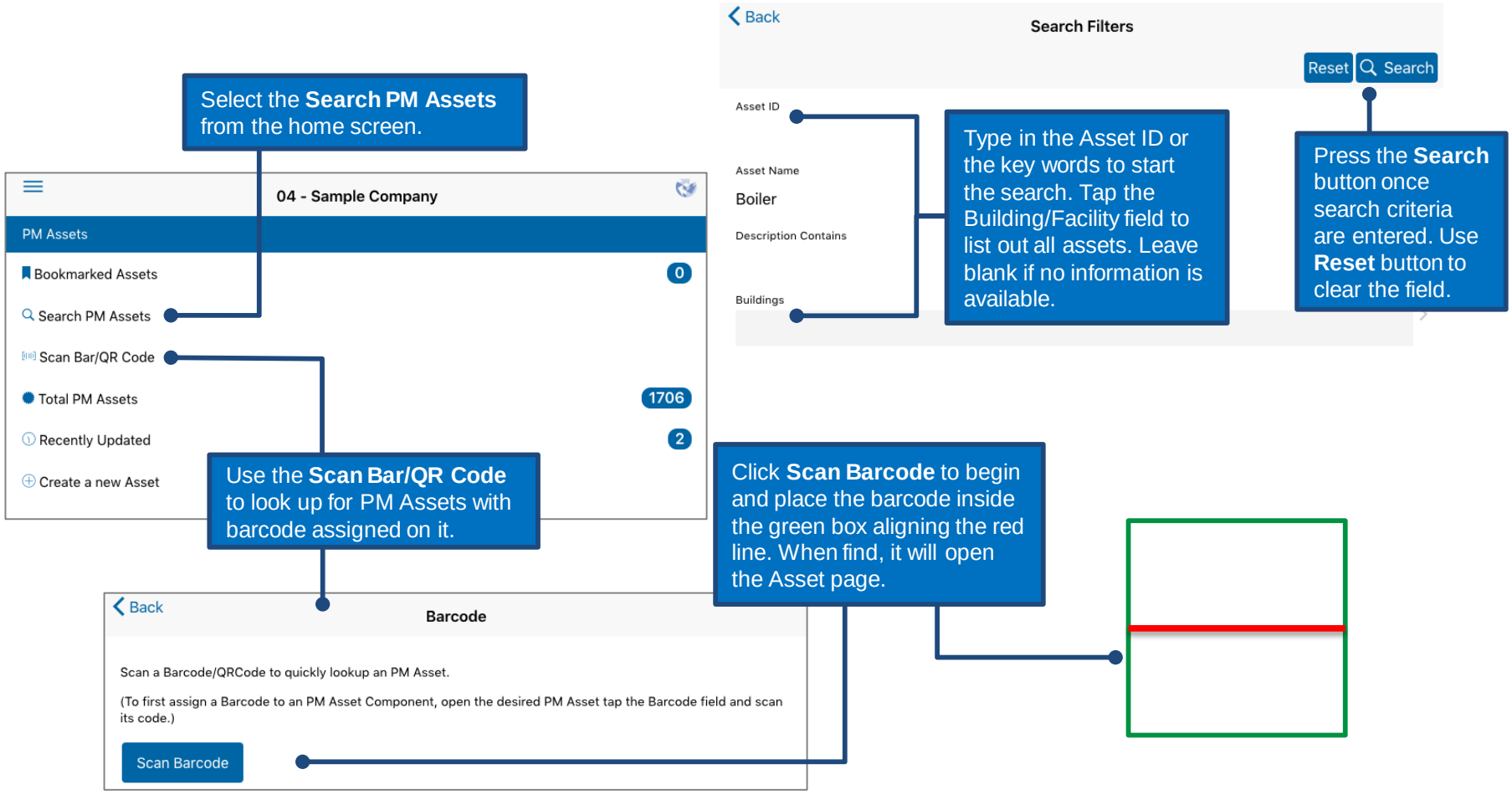
Search PM Assets



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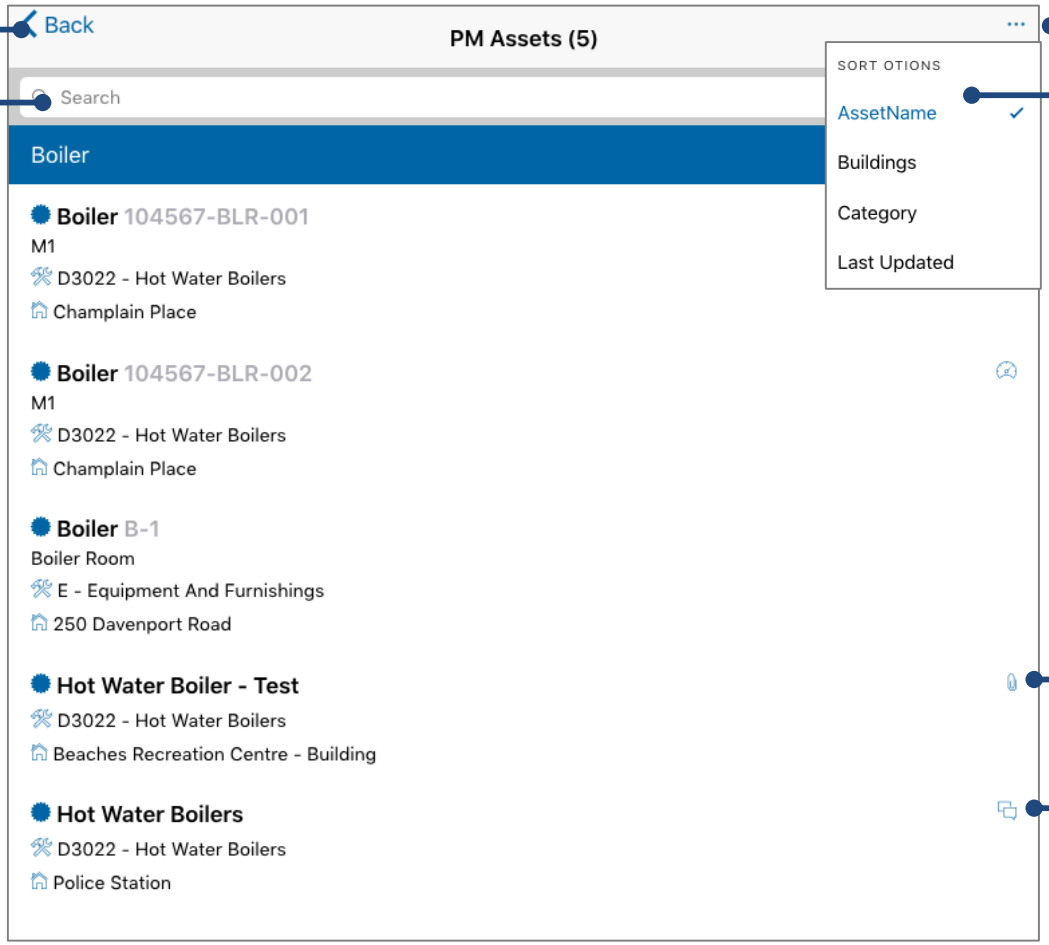
PM Assets Page

Use the **Back** button to return to the previous page.

Use the **Search** field to filter down your searching.



Click the **Sort Option** icon to sort the list according to your preference.

A **clip** indicates that there is a file or a picture attached to the asset.

This **Note** icon appears if a note has been added to the asset.

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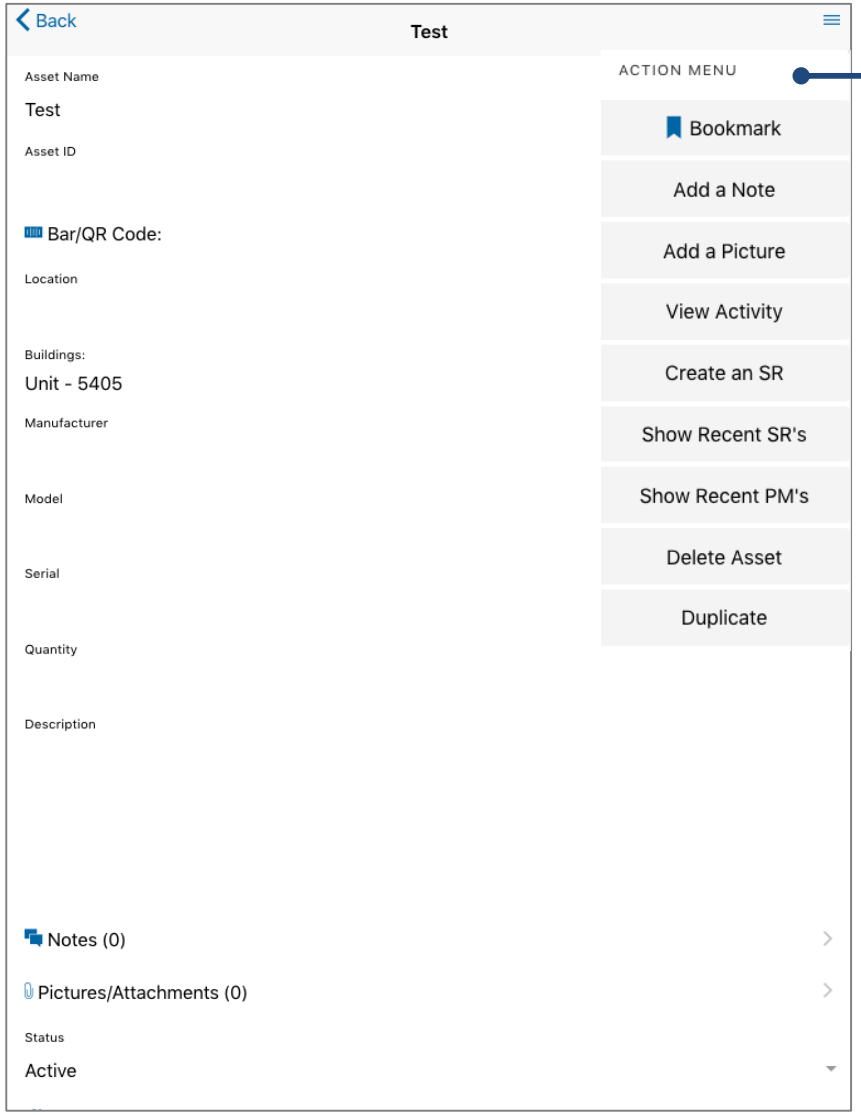
PM Assets Page

PM Asset information is stated in this page. Scroll down to view all the available fields. Additional information can be added on the existing assets.



Use the **Action Menu** to quickly update some fields.

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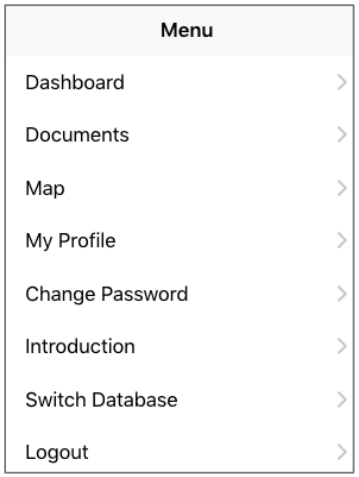
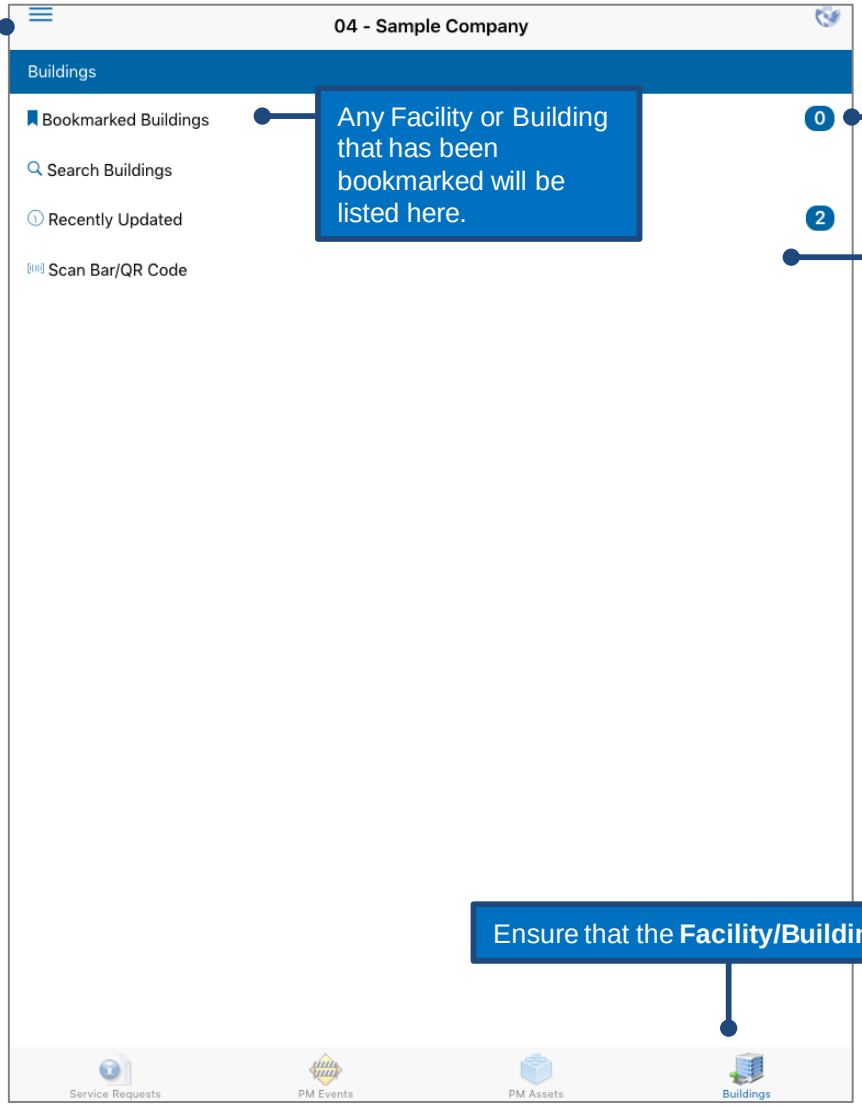
Facility/Asset Class

Facility/Building Home Screen

Select the Menu icon to **Logout**, view **Documents**, **Change Password**, and **Switch Database** *(if you have access to multiple database).*





Any Facility or Building that has been bookmarked will be listed here.

The numbers on this side indicates how many facilities there are in each section.

Ensure that the **Facility/Building** is selected.

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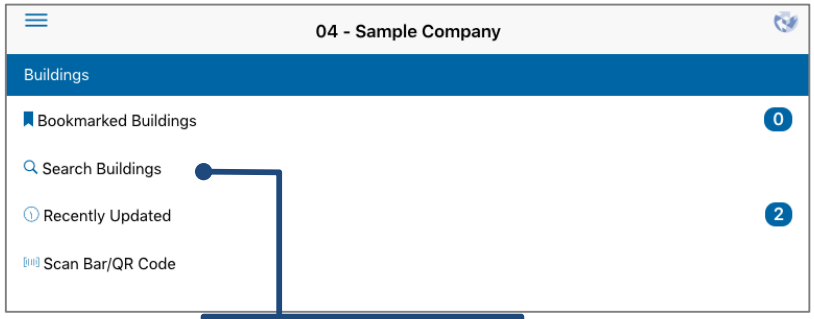
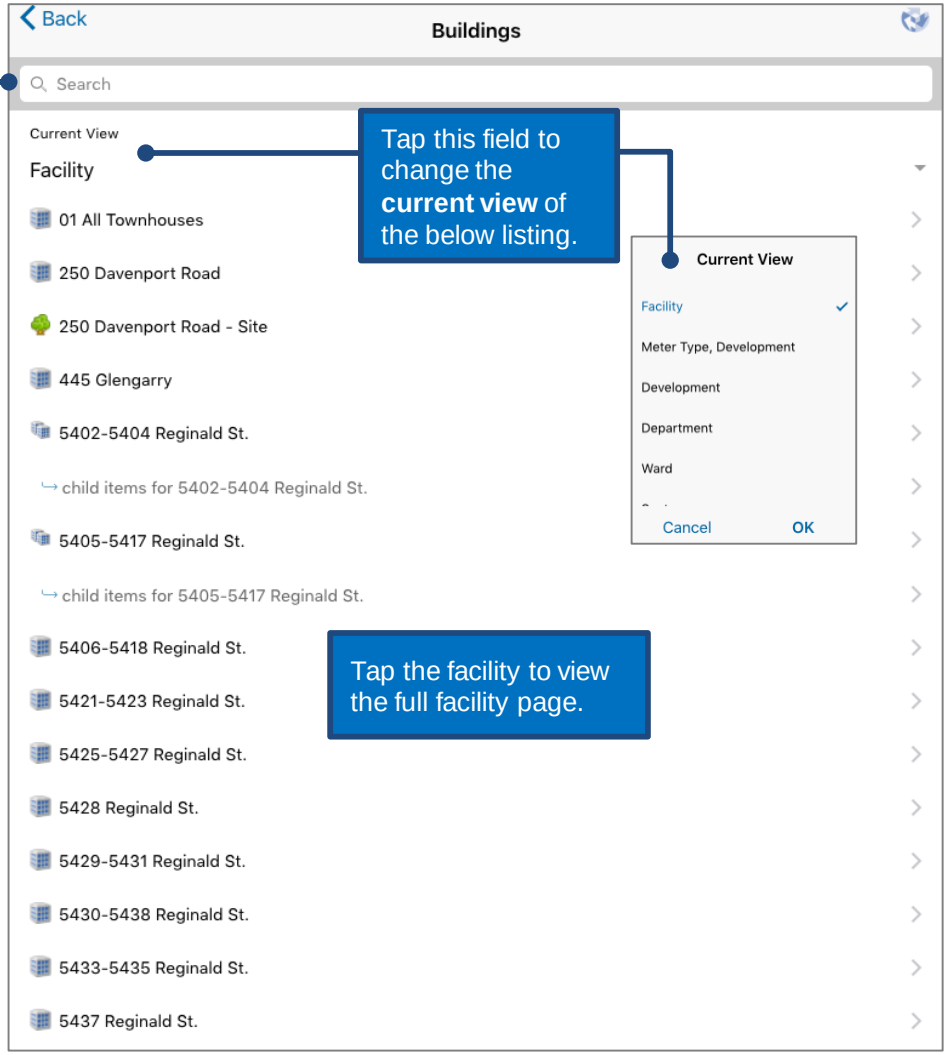
Search Facility/Building



Select the **Search Facility or Building** from the home screen.



Use the **Search** field to filter down your searching.

Tap this field to change the **current view** of the below listing.

Tap the facility to view the full facility page.

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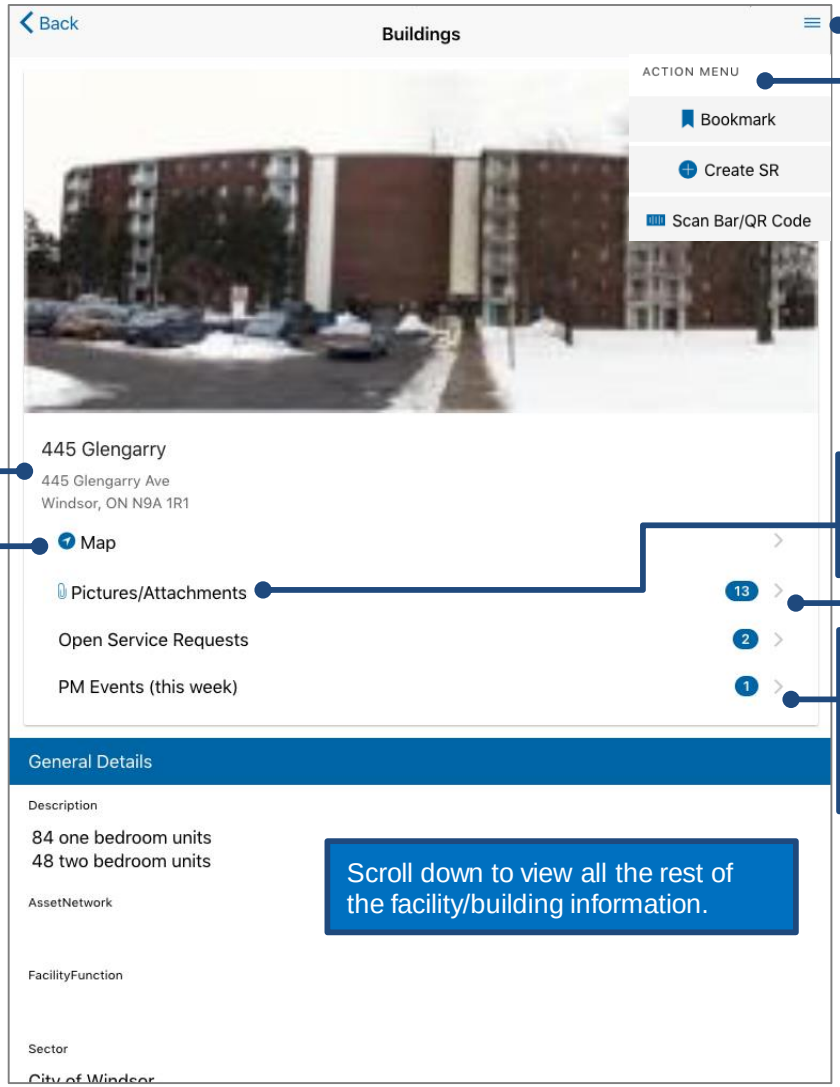
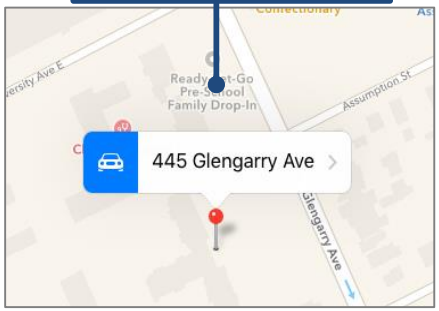
Facility/Building Page



Use the **Action Menu** to bookmark the facility, create an SR, or add or change the facility barcode.

These are the Facility name and it's address.

Open the **Map** to see where the facility is located. The location of the pin is based on the address entered in the facility information.



Attach a document, take a picture or upload from your photo library.

The number indicates how much items there are in each links. Tap the field to view the complete listing.

Scroll down to view all the rest of the facility/building information.

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