



# AssetPlanner®

Service Request Client User Quick Start Guide

2024

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A vertical bar with a gradient from light blue at the top to orange at the bottom.

# Web Link & Login

# Web Link & Login

[www.AssetPlanner.com](http://www.AssetPlanner.com)

The screenshot shows the AssetPlanner login interface. At the top is the AssetPlanner logo. Below it is a login form with a text input field labeled 'UserID or username', a password input field, and a green arrow button. A blue callout box points to the password field with the text: 'Enter your **e-mail address** and the **password** provided to you by Ameresco and then click the **green arrow**.' Below the login fields is a checkbox labeled 'Keep me signed in'. A link 'Forgotten your AssetPlanner password?' is centered below the checkbox. Underneath is a section titled 'Enter a new password' with two input fields: 'Enter a new password' and 'Re-enter new password', followed by 'Save' and 'Cancel' buttons. A blue callout box points to the 'Enter a new password' field with the text: 'Upon logging in for the first time, you will be asked to create a new password for your account.' Below this is a section titled 'Reset your password' with the instruction: 'Please verify your email and press Send below. We will email you a link to reset your password.' It includes an input field 'Enter your email' and 'Send' and 'Close' buttons. A blue callout box points to the 'Enter your email' field with the text: 'Enter **email address** and click **Send** if you forget your password'. At the bottom left are links for 'About AssetPlanner™', 'Privacy policy', and 'Copyright © Ameresco 2020'.

AssetPlanner

UserID or username

Enter your **e-mail address** and the **password** provided to you by Ameresco and then click the **green arrow**.

☐ Keep me signed in

[Forgotten your AssetPlanner password?](#)

Enter a new password

Enter a new password

Re-enter new password

Save Cancel

Upon logging in for the first time, you will be asked to create a new password for your account.

Reset your password

Please verify your email and press Send below. We will email you a link to reset your password.

Enter your email

Send Close

Enter **email address** and click **Send** if you forget your password

[About AssetPlanner™](#) | [Privacy policy](#) | Copyright © Ameresco 2020

**Note:** The log in page support the Single Sign-on.



# Home Page & Navigation

# Home Screen – Help Tab

The help and dashboard screens are shown on the top right. Navigation of requests, documents and modules is available on the left side of the screen.

The screenshot displays the 'Asset Planner K-12 Demo' interface. On the left is a 'Navigator Bar' with a scrollable list of links: Home, New Request, Materials Request, My Requests, Search Requests, Approve Requests, Documents, Knowledge Base, Profile, AssetPlanner (selected), and Switch Database. Below these links are the links 'en | fr | es | it' and 'AssetPlanner SR Client Version 1.2.16'. The main content area is titled 'DASHBOARD' and 'HELP' (highlighted). It features a welcome message: 'Welcome to the (CLIENT NAME) Work Order System!'. Below this is a paragraph: 'Please use this system to request Facilities Management services. Use the "New Request" link to create a new request. Once created you will receive Email communications as we update the status of your request. You may also track the status of your request online using the "My Requests" link.' This is followed by two emergency instructions: 'If this is an emergency, refer to your RED EMERGENCY BINDER and follow the instructions.' and 'If this is an urgent request, call the Facilities Service Centre 24 hour line at 1-866-555-5555 and follow the prompts.' The contact information 'Facilities Service Centre email: [facilitieservicecentre@demo.us.com](mailto:facilitieservicecentre@demo.us.com)' is provided. A section titled 'Fire Alarm Panel Inspections' with an information icon contains the text: 'We will be contacting each facility to let them know when their fire panel inspections are going to be scheduled. Only those facilities that need to be contacted will receive an email.'

**The Navigator Bar** provides shortcuts and actions. Your organization may customize by adding links to the bottom of the Navigation Bar.

**Help** provides information that is important to share with your clients. It is customizable and includes the opportunity to welcome users to the system and guide their use of the software while providing them insight into internal organizational processes..

**Client Bulletins** will appear on both the Dashboard and Help menus.

# Home Screen - Dashboard

**Asset Planner K-12 Demo**

**Dashboard**

**Your Requests:**

Open Requests	Recently Updated	Closed Requests	Approvals Required
8	0	3	0

**Fire Alarm Panel Inspections**

We will be contacting each facility to let them know when their fire panel inspections are going to be scheduled. Only those facilities that need to be contacted will receive an email.

**Client Bulletins** will appear on both the **Dashboard** and **Help** menus.

**Dashboard** provides information specific to your clients Assets, and the requests they have submitted. Clicking on one of the icons will take you to a find screen that displays additional information about the requests displayed.

**AssetPlanner**

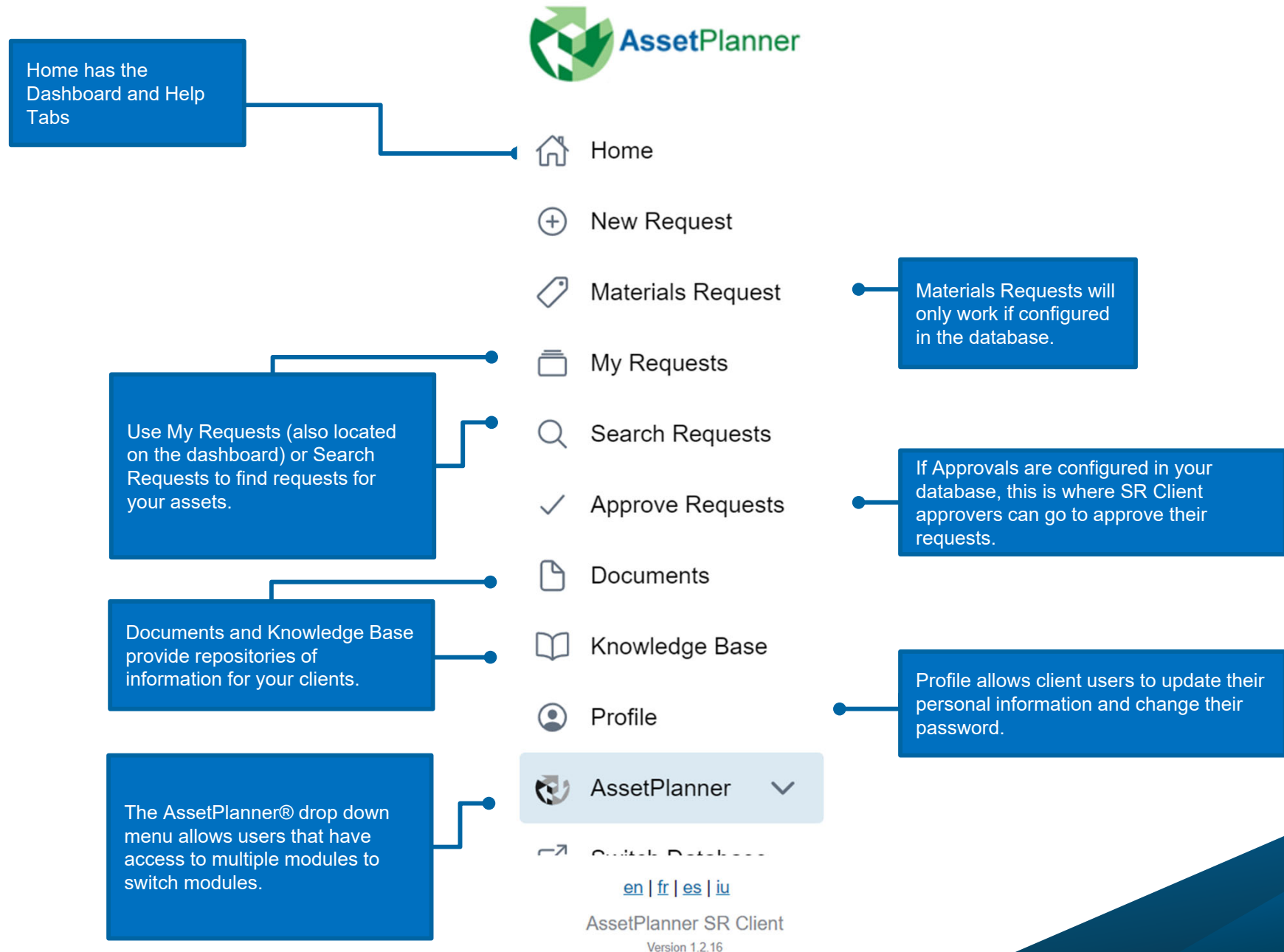
- Home
- New Request
- Materials Request
- My Requests
- Search Requests
- Approve Requests
- Documents
- Knowledge Base
- Profile
- AssetPlanner

en | fr | es | it

AssetPlanner SR Client

Version 1.2.16

# Navigation Menu - Details





# Creating New Service Requests

# Create A New Request

To Create a New Request use the 'New Request' Button on the Navigation Menu located on the left side of the screen.



Home



New Request



Materials Request



My Requests



Search Requests

Click **New Request** on the navigation bar on the Navigation bar.

# Contact Details

Enter your contact details if they don't pre-populate. Use the Copy E-mail function to include others on notifications pertaining to the request. Note that Fields that have an \* **asterisk** beside them are Mandatory fields and must be filled out.

The screenshot shows a 'Contact Details' form with the following fields:

- Contact**: Stephanie Dove
- \*Phone**: +1 587-316-9592 (with a Canadian flag icon)
- Mobile Phone**: +1 XXX-XXX-XXXX (with a US flag icon)
- CC Email (to copy on notifications)**: (empty)

Callout boxes provide additional information:

- A box pointing to the 'Contact' and 'Phone' fields states: "Your **Name** will pre-populate. If your phone number is updated in your profile it will also pre-populate."
- A box pointing to the 'CC Email' field states: "If you want to Copy someone else on the Service Request add their e-mail address here. They will receive updates by e-mail based on company notification settings."

# Asset & Location

Note that the available assets and locations can be adjusted by your organization. For example, your organization may limit your view so that you only see building assets. Likewise, organizations may choose to use a pre-populated list of room numbers or floor numbers. Be as specific as possible when indicating the Asset and Location.

Location	
*Asset	
Atherton Elementary	
*Floor	
1	
Location/Room #	
CR101	

Select the Asset from the drop down if you don't have a default Asset. If you have access to multiple Assets and wish to select a different Asset, click on this field to select another Asset. \*Reminder you will only see the Assets your organization has given you access to. If you don't see the Asset needed contact your database Administrator.

Select the Floor and Location from Drop Downs if requested. These fields may not appear if not required by your organization. They may or may not be mandatory fields depending on the needs of the organization.

# Service Request Type and Details

The Type of Request is a searchable field that allows you to provide an overview of the request you are making. Prompt Text will appear based on the Type of Request you Select. The Prompt Text will appear above the details or Comments and will guide you through additional information the organization may need. Note that as AssetPlanner is customizable the fields you see may vary organization by organization and Type of Request by Type of Request.

**Request Details**

\*Type of Request

Click in the Field to pick a Type of Request. Select the request type that is closest to your issue.

\*Priority

Priority may or may not appear. If the Priority is available, use the descriptions provided by your organization, viewable by clicking on the field, to select the most appropriate priority. See example descriptions.

Low

Requested Completion

This field may or may not appear. If it does appear, you can use this field to tell the organization when you want the work done.

Details or Comments...

This field allows you to provide additional details that may not be relayed in the fields above. It is important to communicate the issue/concern/need. If the prompt text asks for specific details this is where you can include them.

☒ Low  
Greater than 5 days response

☐ Medium  
3 - 5 day response

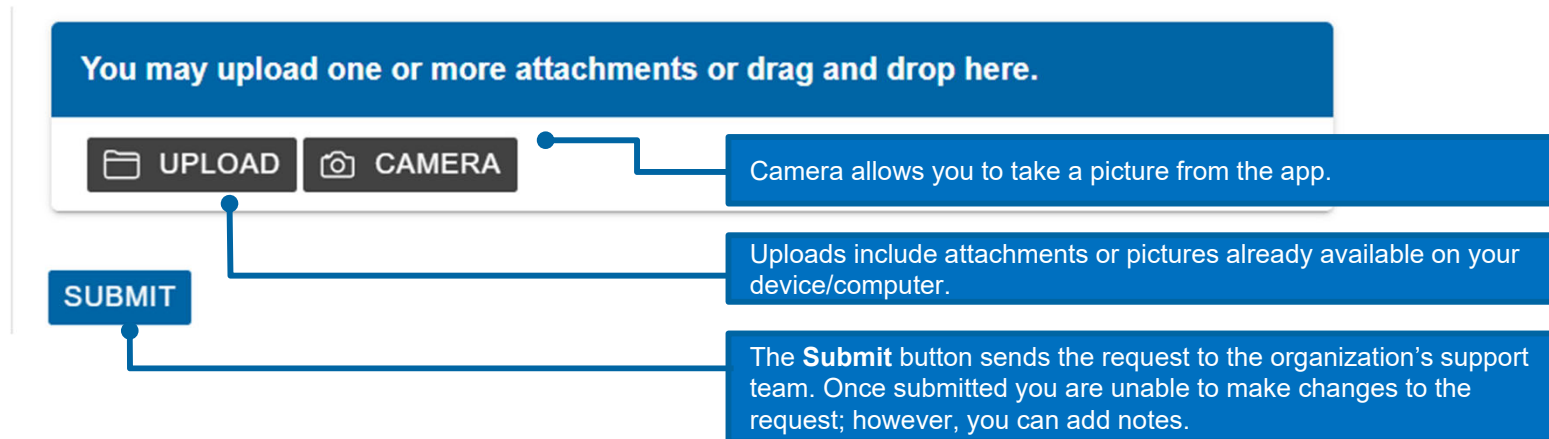
☐ High  
1 -3 day response

☐ Urgent  
Same day

# Attachments & Pictures

Attaching a document/picture or using the camera to capture the issue, can provide necessary information for those supporting your request. A picture says a thousand words.

To add an attachment/picture it must be saved on your device. To take a picture from the app you must be using a device with a camera.





# Searching Service Requests

# My Requests VS Search Requests


My Requests on the Dashboard and Navigation Bar allows you to see requests you have submitted. Search Requests is only available on the Navigation Bar.

If enabled by the organization Search Requests may allow you to see requests submitted by others for your Assets. For clarification on the organizational process used by the organization speak to your database Administrator.



 Home

 New Request

 Materials Request

 My Requests

 Search Requests

Use My Requests (also located on the dashboard) or Search Requests to find requests for your assets.

# Finding/Sorting Service Requests

Open My Requests or Search Requests will bring up the screen below.

The screenshot shows the 'Service Requests' interface. At the top, there's a breadcrumb 'Service Requests' and a filter 'Service Requests where Status != Closed'. Below this is a search bar. The main area is a table with columns: Request #, Asset, Asset / Equipm..., Notes, Attac..., Created, Status, Pending, Priority, Name, and Summary. The table lists five requests, all with a status of 'Completed'. Callouts provide the following information:

- This area shows any filters applied to the data.** (Points to the filter text 'Service Requests where Status != Closed')
- Use the Search Field to search using specific words that may be included in the Service Request** (Points to the search bar)
- Allows the ability to hide/unhide closed requests easily.** (Points to the 'Hide closed requests' checkbox)
- The wheel/gear allows you to change the fields you see on the table view.** (Points to the gear icon in the top right)
- Changes the view from Grid to List.** (Points to the 'GRID' and 'LIST' toggle)
- The Box with an arrow allows you to download the list in excel.** (Points to the download icon in the top right)
- Each column can be filtered/sorted. Click on the column heading to sort or the three lines to filter.** (Points to the column headers)
- The first column contains **hyperlink** to take you to the detailed view of the request.** (Points to the 'Request #' column)

Request #	Asset	Asset / Equipm...	Notes	Attac...	Created	Status	Pending	Priority	Name	Summary
<a href="#">SR006288</a>	Conroe Elementary			1	2019-10-30 10:39:16	Completed				
<a href="#">SR006295</a>	North Creek Compositi			1	2020-10-30 08:57:08	Completed				
<a href="#">SR006838</a>	Harrison Elementary				2021-09-29 18:00:00	Completed				
<a href="#">SR006840</a>	Magna High School				2020-12-31 17:00:00	Completed				
<a href="#">SR006844</a>	Sandy Bay Elementary				2020-10-31 18:00:00	Completed				


# Service Request Details

Clicking on the blue link in the Finding Grid / List will bring up the details of the service request.

← SR006288

The dates are shown first followed by the summary and description of the request.

### Request Details

 Scott Cripps (ASG) >

Created

2019-10-30 10:39:16

Last Updated

2023-01-17 15:57:43


Summary

Elevators

Q KB

Description

Test

AMERESCO 

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# Service Request Details - Communication

Notes are communication between the client and support teams. Click on Notes to open the Notes Screen.



Notes (0)



Materials Requested (0)



Pictures/Attachments (1)



Attachments  
- 2019-10-30 10:39:17

Attachments/Pictures can be added by pressing 'Add'.

ADD

Click 'Add Note' to send a communication to the Assigned Group/Individual. This note is kept with the service request and will be visible for others.

ADD NOTE

All Notes will be visible (if there are any) in the details area below the SR number. Notes will include the name of the individual that added them, the date and the time added.

# Service Request Details – Other

Other fields may appear based on the settings of the organization. In the Status/Assignment section you will be able to see the group, individual and Service Provider (if/as assigned). You will also see the status and scheduled date.

Status/Assignment
Status
Completed
Pending
Priority
Urgent
Requested Completion
Scheduled Start Date
2023-01-17 09:00:00
Actual Start Date
Date Completed
2023-01-17 15:57:00
Date Closed
Assigned Group
Assigned To
Anita Wilson
Assisted By
Anita Wilson
Service Provider

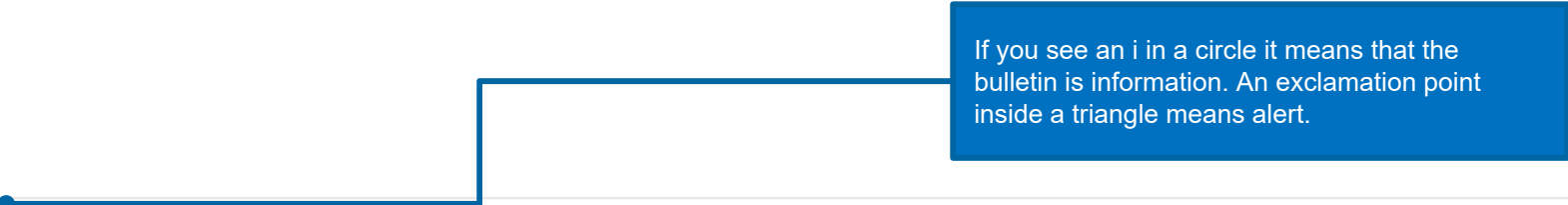
A vertical bar with a gradient from light blue at the top to orange at the bottom.

# Bulletins

# Bulletins

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- From time to time, the organization may display bulletins. These will appear on the Home screen (both Dashboard and Help screens). Bulletins provide important information or alerts.



If you see an i in a circle it means that the bulletin is information. An exclamation point inside a triangle means alert.

## Fire Alarm Panel Inspections

We will be contacting each facility to let them know when their fire panel inspections are going to be scheduled. Only those facilities that need to be contacted will receive an email.



# Thank You!

**AssetPlanner™ Support Line:**  
1-855-583-2627

**2024**