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AssetPlanner®

Service Request Client User Quick Start Guide

2024

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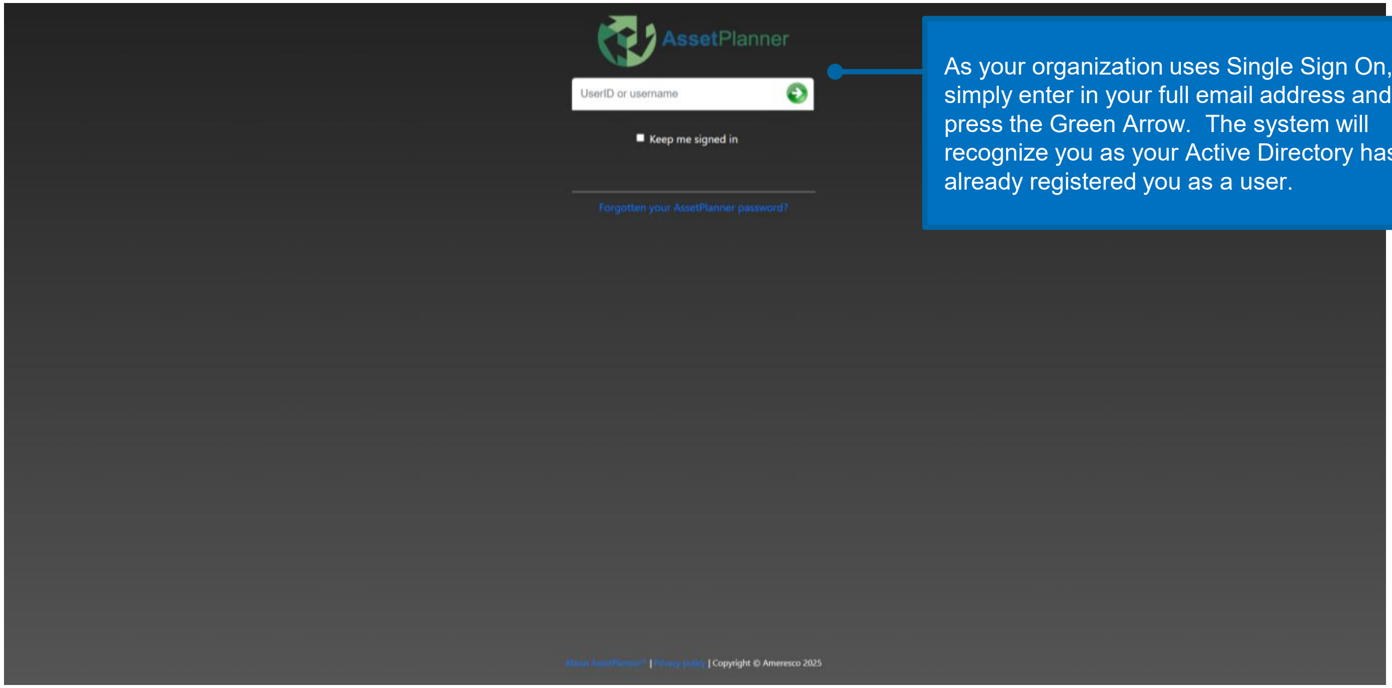
Web Link & Login

Web Link and Login

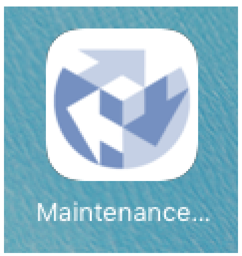
https://us.assetplanner.com/



As your organization uses Single Sign On, simply enter in your full email address and press the Green Arrow. The system will recognize you as your Active Directory has already registered you as a user.

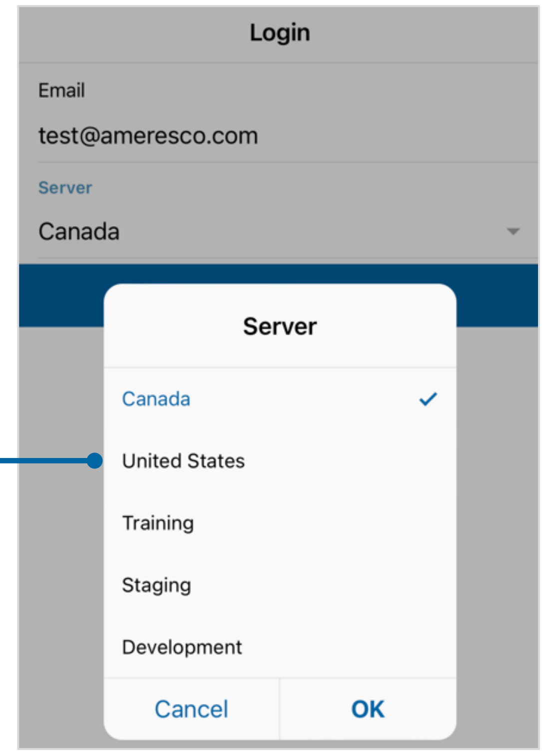
Mobile Application Login

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



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

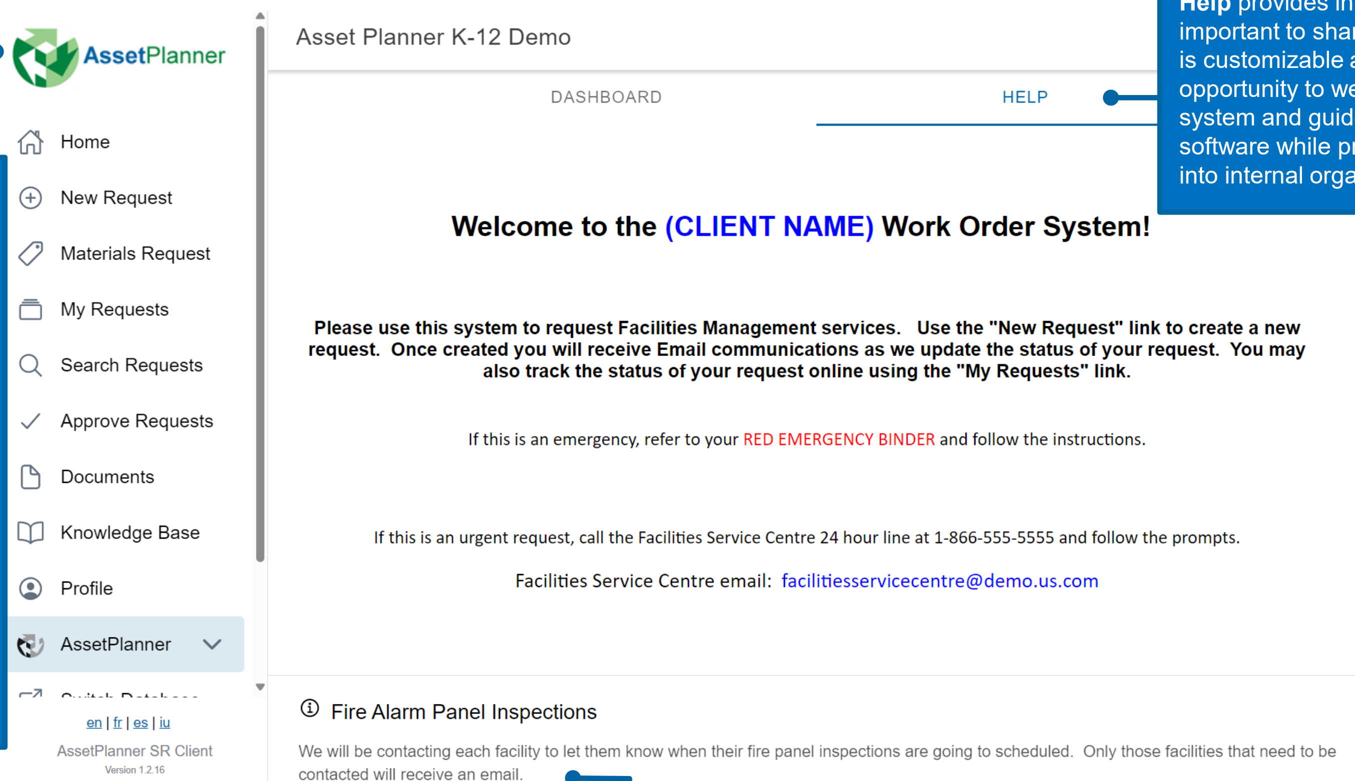
Ensure the correct server is selected. **Select Canada for Canadian users and United States for US users.



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.



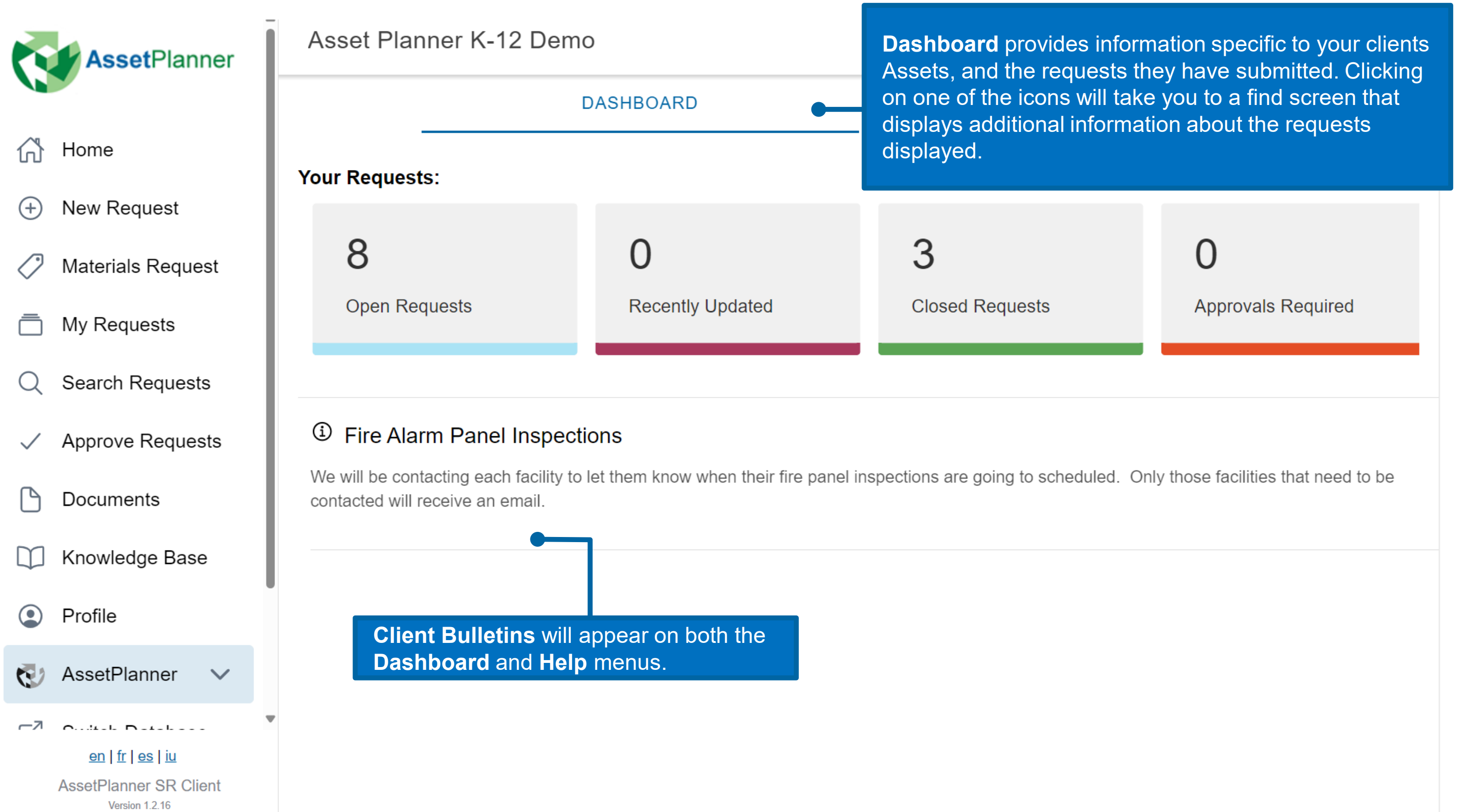
Help provides information that is important to share with your clients. It is customizable and includes the opportunity to welcome users to the system and guide their use of the software while providing them insight into internal organizational processes..

The **Navigator Bar** provides shortcuts and actions.

Your organization may customize by adding **links** to the bottom of the Navigation Bar.

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

Home Screen - Dashboard

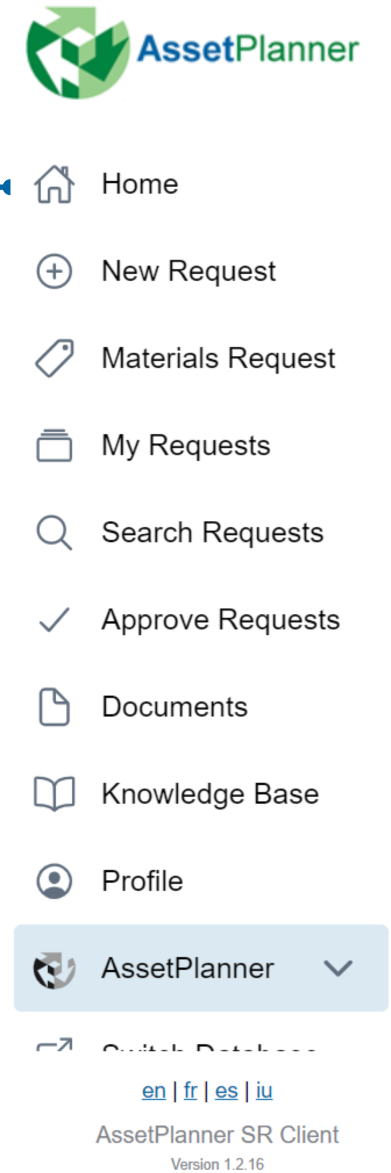


Dashboard provides information specific to your clients Assets, and the requests they have submitted. Clicking on one of the icons will take you to a find screen that displays additional information about the requests displayed.

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

Navigation Menu - Details

Home has the Dashboard and Help Tabs



Materials Requests will only work if configured in the database.

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

If Approvals are configured in your database, this is where SR Client approvers can go to approve their requests.

Documents and Knowledge Base provide repositories of information for your clients.

Profile allows client users to update their personal information and change their password.

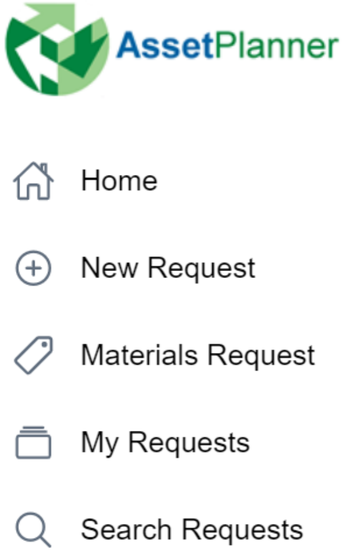
The AssetPlanner® drop down menu allows users that have access to multiple modules to switch modules.

Creating New Service Requests

Create A New Request

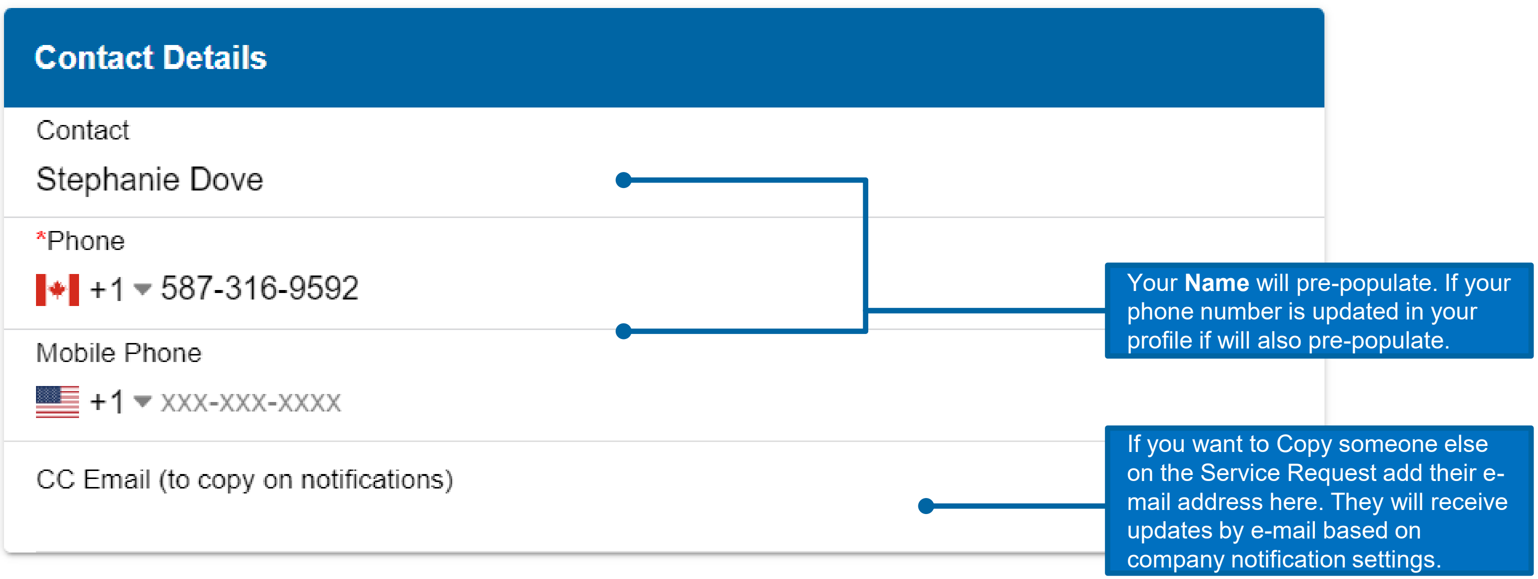
To Create a New Request use the ‘New Request’ Button on the Navigation Menu located on the left side of the screen.

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



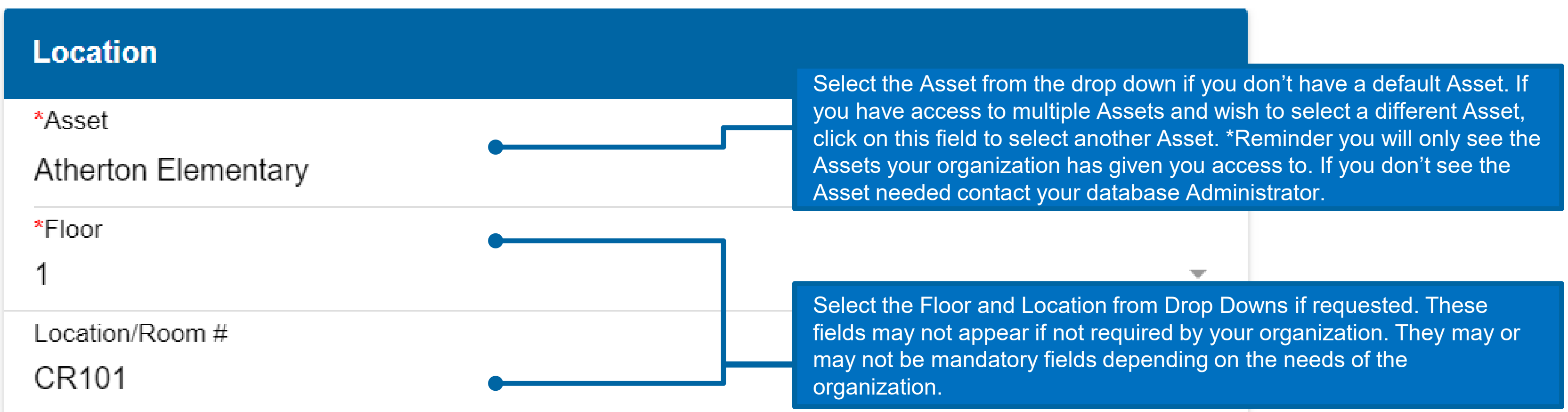
Contact Details

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.



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.



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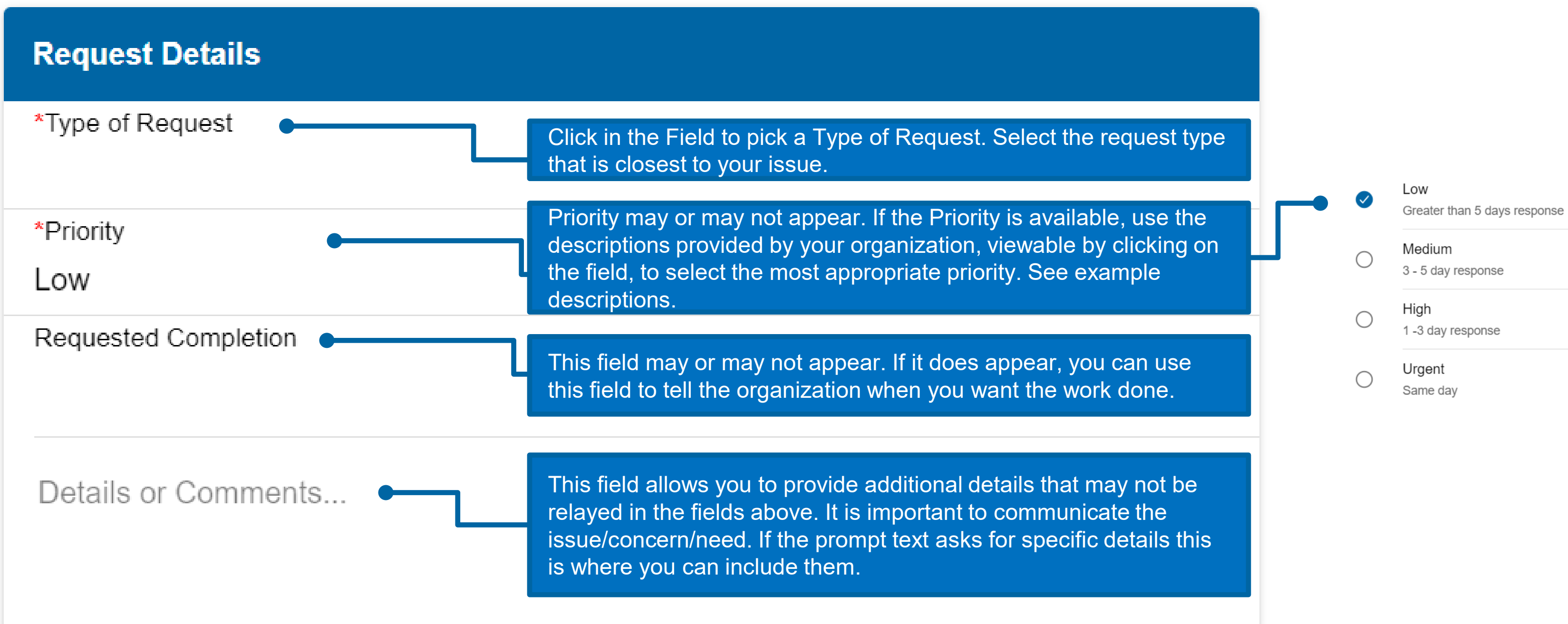
Service Request Type and Details

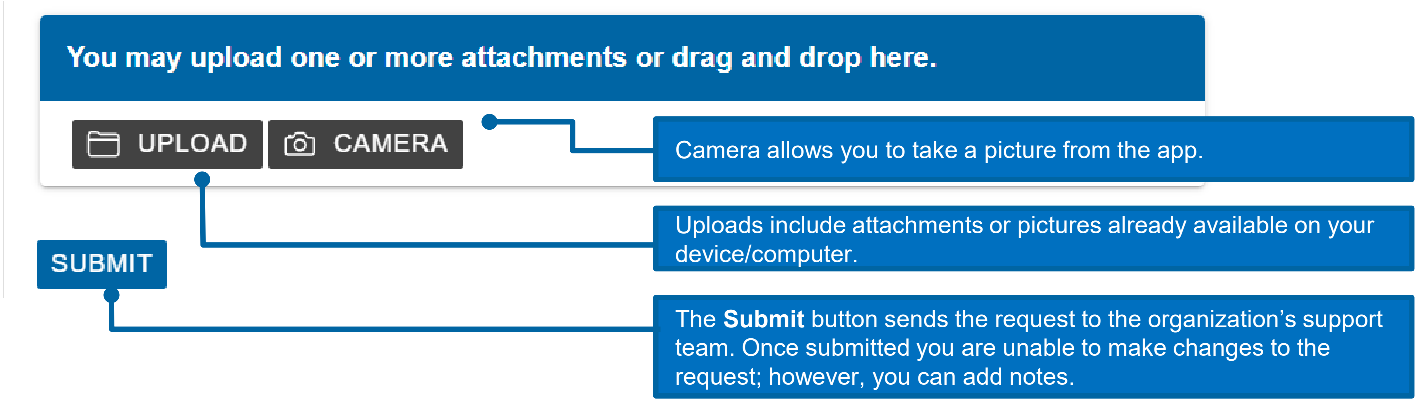
The Type of Request is a searchable field that allows you to provide an overview of the request you are making. Prompt Text will appear based on the Type of Request you Select. The Prompt Text will appear above the details or Comments and will guide you through additional information the organization 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.



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.

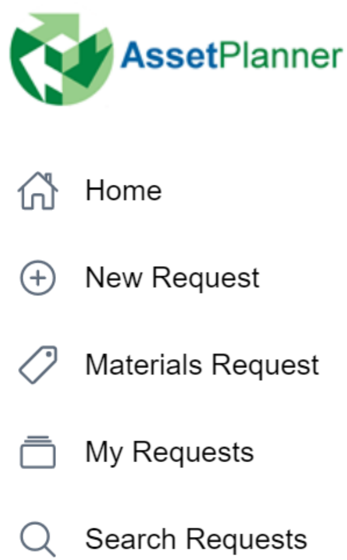


Searching Service Requests

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.

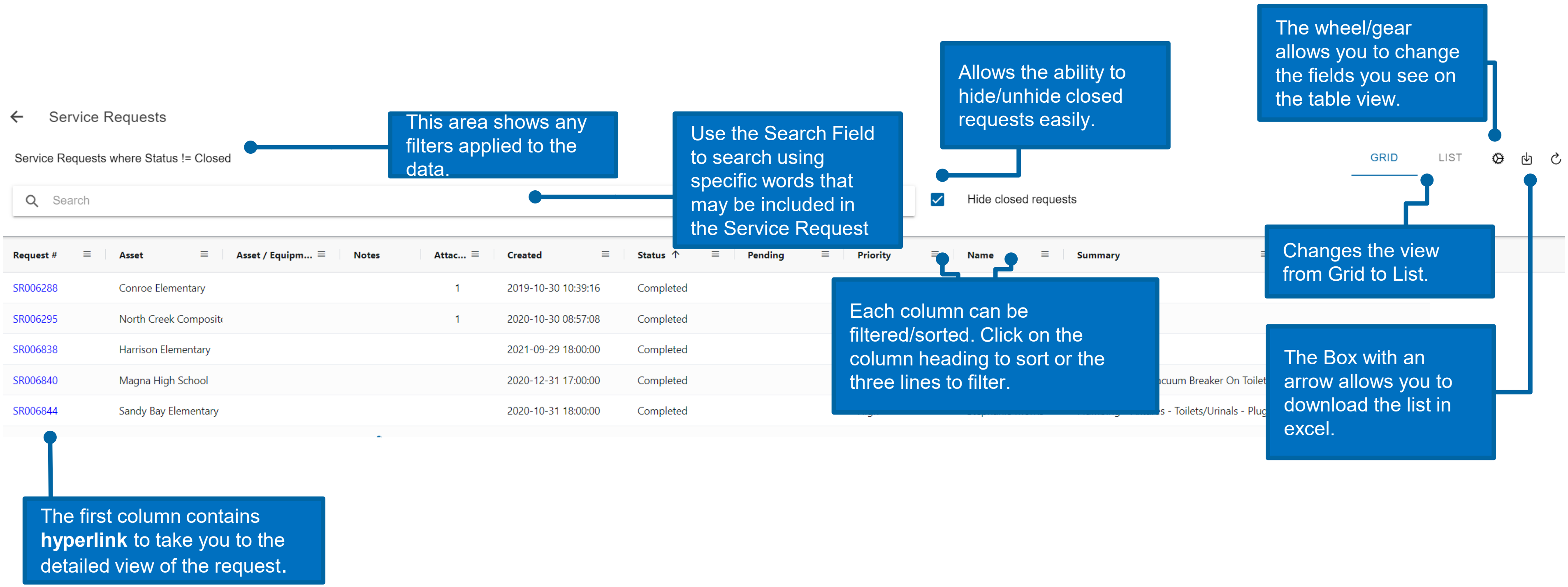
If enabled by the organization Search Requests may allow you to see requests submitted by others for your Assets. For clarification on the organizational process used by the organization speak to your database Administrator.



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

Finding/Sorting Service Requests

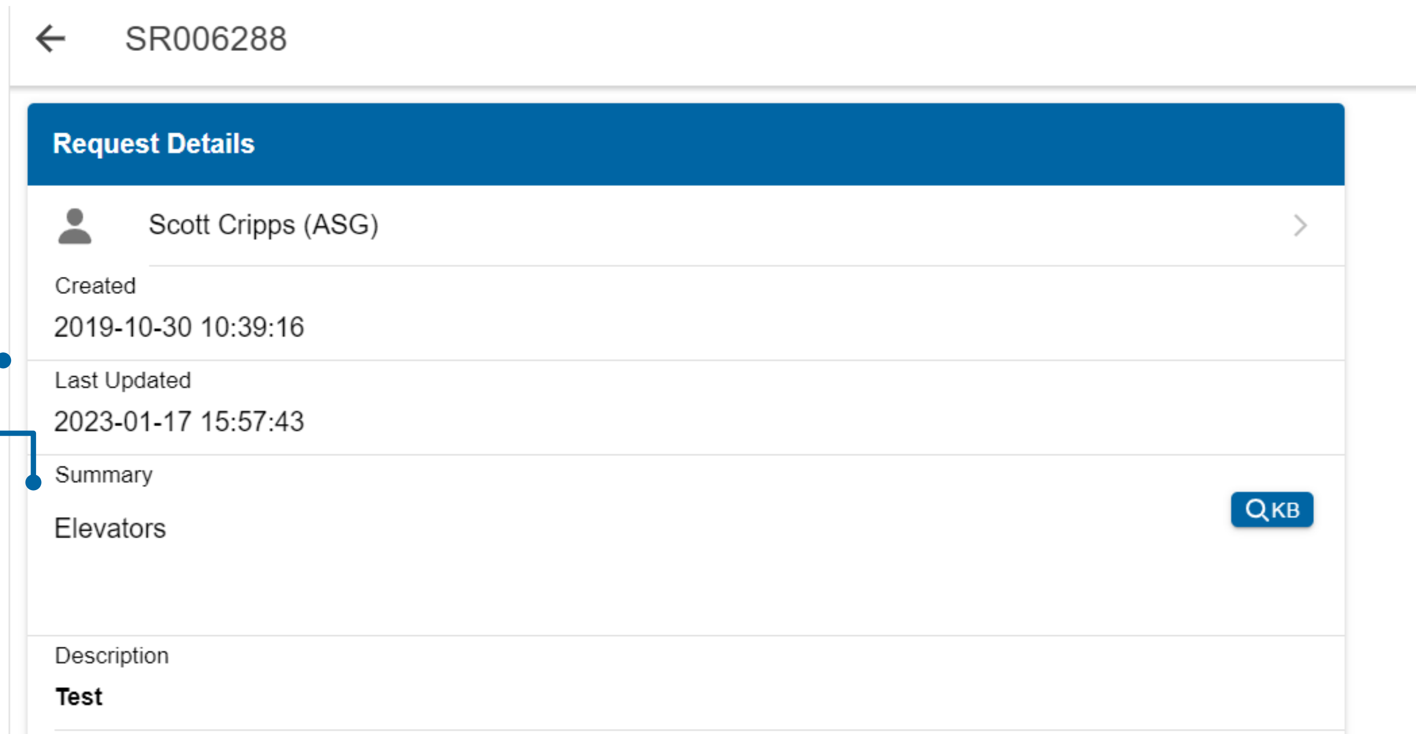
Open My Requests or Search Requests will bring up the screen below.



Service Request Details

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

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



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)

ADD

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

Attac hments

Attachments

- 2019-10-30 10:39:17

SR006288 Notes

ADD NOTE

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.

No Notes

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

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Bulletins

Bulletins

- 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 scheduled. Only those facilities that need to be contacted will receive an email.

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Thank You!

AssetPlanner™ Support Line:

1-855-583-2627

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