



AssetPlanner™

Service Request Client Module Quick Start Guide



AMERESCO  ASSET SUSTAINABILITY

Confidential & Proprietary



SERVICE REQUEST

Home | New Request | My Requests | Search Requests | Documents | My Profile

Service Requests: | Service Request Client / New Request | Print

NEW SERVICE REQUEST

Step 1:
Please confirm your phone number select the Request Type, and set the Priority of your request.

If the Type of request you are making is not listed please choose the "Other" selection and provide details on the next page.

New Request

Contact information

Name: Mary Dollano

Phone: *

Mobile Phone:

CC Email:

Request Specification

Buildings: *

Type of Request: *

Priority: Low

Req. Completion Date:

CUSTOM 1:

CUSTOM 2:

Budget Number:

Asset: Type here to search for related Asset...

Location/Room #:

* denotes a required field.

Cancel Next >>

Click the **New Request** on the menu bar or on the quick link shown in the Navigator bar

Complete the fields that have an * **asterisk** beside them. These are information fields your support team requires to respond effectively to your request.

Select the **Type of Request** you need to submit. This is a list ready built templates that you can elaborate on in the next screen.

Click **Next** after completing the fields in this form.

This page allows you to elaborate on the details for the request you are submitting.

Service Request Client / New Request Print Help



NEW SERVICE REQUEST

Step 2:
Please provide as much information as possible to help us provide the quickest response to your request. Then press Submit to create your new request.

New Request

Details

Please indicate the Facility, Building and Room with the problem.
Are other outlets in your room experiencing the same problem, or just one?

Provide a brief explanation about the request you are submitting in this **Details** section following any guidelines that are asked in the prompt text shown above the detail text box.

If applicable, the requestor can include/attach up to 3 files or documents to support the request. Documents are sourced from your computer file after clicking on **Choose File**. Ex. Pictures, word documents, excel files, card drawings, etc.

Attachment: No file chosen (You may attach up to 3 files)

[attach another file](#)

After pressing submit, the database will inform you of the SR number that has been assigned to your new request. An email receipt may also be received after the SR has been created.

Service Request Client / New Request Print Help



NEW SERVICE REQUEST

Thank-You
We will contact you later regarding your request.

New Request

New Service Request Created

Service Request SR001669 has been created.

You may check on the status of your request at any time or provide more information to us by using the My Requests link above.

Finished

To complete the process, click **Submit** button and the request will be entered into the system.



SEARCH SERVICE REQUEST DATA

Some facilities may have more than one requestor.

The screenshot shows the 'Service Request Client / Search for Service Requests' interface. The top navigation bar includes 'Home', 'New Request', 'My Requests', 'Search Requests', 'Documents', and 'My Profile'. A left sidebar contains 'Service Requests' with sub-links for 'New Request', 'My Requests', 'Search Requests', 'Approve Requests', 'My Profile', and 'Switch Database'. The main area is titled 'Search Criteria' and contains the following fields: 'Service Request #' (text input), 'Status' (dropdown menu), a checked 'Hide Closed Requests' checkbox, 'Requestor Name' (text input), 'Work Order' (text input), 'Department' (dropdown menu), 'Facility' (dropdown menu), 'Location/Room #' (dropdown menu), 'Summary contains' (text input), 'Details contains' (text input), 'Starting Date' (calendar picker), and 'Ending Date' (calendar picker). At the bottom right are 'Search', 'Cancel', and 'Help' buttons. Three blue callout boxes provide instructions: one points to the 'Search Requests' link in the sidebar, another points to the 'Search' button, and a third points to the search criteria form.

Click the **Search Service Request** on the menu bar or on the quick links in the navigation bar.

You will be directed to a form where you will be provided with a number of filtering options.

Press **Search** when finish populating the filter fields to produce the list of service request that fit the filter criteria.

You can sort this table by clicking on any one of the column header, such as Date.

Use the **Print** button when ready to print the list.

Service Request Client / Search for Service Requests Print

Search Results Pages: < 1 2 3 5 >

Select all | Unselect | Select between | Display all | Export | Customize

Request	Date	Status	Priority	Buildings	Summary	Service Provider	Requestor
SR001669	2017-10-03 16:21:26	New	Low	250 Davenport Road	Electrical - No Po		Mary Dollano
SR001668	2017-09-20 13:37:12	New	Low	250 Davenport Road	Ceilings - New Discoloration		Anita Wilson
SR001667	2017-09-19 15:37:12	New	Low	Community Centre	This is a test		on
SR001666	2017-09-19 15:30:32	New	Low	Community Centre	need to pails of soap		on
SR001665			Low	City Hall - Site	VANDALISM - Interior		Dollano
SR001664			High	Recreation Centre	Ceilings - Water Stains		Anita Wilson
SR001663			Low	Community Centre	Ceilings - Water Stains		Anita Wilson
SR001662			Low	250 Davenport Road	Air Quality - Odour Detected - Moldy, Mildew, Damp Smell		Steve Drew

Export will produce an excel version of the data.

The **Customize** button allows you to add or remove different columns of information to your table.

The first column contains **hyperlink** to take you to the detailed view of the request.

The icons shown beside each request can visually identify what are the current status of the requests:

- New Status
- Pending
- Work in Progress
- Closed
- New Notes

Note: Status changes or addition of notes are generally followed up with an email notification to the requestor.

Customize Columns can be used to add or remove columns from your table.

The screenshot shows the 'Customize Columns' dialog box with the following components and callouts:

- Columns to Display:** A list of columns currently shown in the table, including Request, Date, Status, Priority, Buildings, Summary, Service Provider, and Requestor. A callout box states: "Items listed here are columns that are currently displayed in your table."
- Ordering:** Up and down arrow buttons are located to the left of the 'Columns to Display' list. A callout box explains: "Use the arrow **Up** and **Down** to change the order of which columns appear in your table."
- Buttons:** '<< Add' and 'Remove >>' buttons are positioned between the two column lists. A callout box instructs: "Use the **Add** and **Remove** button to move an item from left to right and right to left. **Highlight/Select** the item that you wish to move then press the Add or Remove button."
- Columns Available:** A list of columns that can be added to the table, including Actual Start Date, Assigned Group, Assigned To, Block, Budget Item, CUSTOM 1, CUSTOM 2, Category, CreatedBy, Date Closed, Date Completed, Department, Description, Estimated Cost, and Floor. A callout box notes: "Items listed here are the columns available for you to include in your table."
- Reset Settings:** A checkbox labeled 'Reset all users settings for this form' is present. A callout box says: "Press the **Save** button when changes are done."
- Default Buttons:** 'Company Wide Defaults: Save Reset to Default' and 'Personal Defaults: Save Reset to Default Cancel' are at the bottom. A callout box explains: "Use the **Reset to Default** button to change back to the original order of columns."

To view the request in its detailed view, click on one of the active links show in blue. It is always the first column on the left (See slide 14).

Request Details contains all the general information relating to the request you entered as well as information that will be updated by the Support Team such as Status, Date Completed.

Location/Assignments states where the request for service is required and whom the SR is assigned to.

Service Request SR001669

Request Details	Location / Assignment
Request #: SR001669	Buildings: 250 Davenport Road
Requestor: Mary Dollano	Location/Room #: CUSTOM 1
Date Submitted: 2017-10-03 16:21:26	CUSTOM 2
Submitted By: Mary Dollano	Work Order #:
Req. Completion Date	Group Assigned:
Date Completed:	Individual Assigned:
Status: New	Service Provider:
Attachments: <input type="button" value="Add"/>	

Description

Summary: Electrical - No Power At Outlet

Details: No. Sample only

Notes (0)

To provide more information or inquire about the status of this request, press the Add Note button and enter your comments. Comments you provide will be emailed to the assigned person(s).

Description contains the summary or template chosen to create the request along with the additional details you provided to support the request

Lists any **Notes** or comments that have been added to the request or provides the option to add a note to the request.



BULLETINS

From time to time, your service request support team may display Bulletins. These will appear below the welcome message on your log in screen.

Service Request Client / Home Print | Help

Welcome to the **(CLIENT NAME)** Service Request System!

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.

If this is an emergency, refer to your **RED EMERGENCY BINDER** and follow the instructions.

If this is an urgent request, call the Facilities Service Centre 24 hour line at 1-866-555-5555 and follow the prompts.

Facilities Service Centre email: facilitieservicecentre@demo.us.com

i 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.

Bulletins may be information that is used or needed on an ongoing basis. It may also be for the purpose of an alert to make you aware of an event or maintenance activity that will occur.