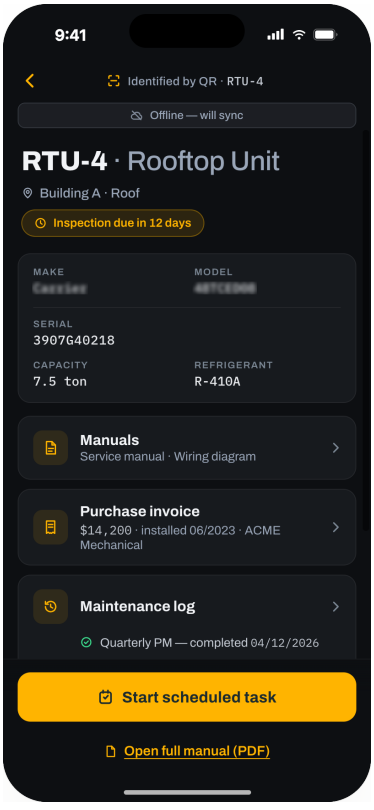
ZYLERGY

QUICK START GUIDE

Zylergy Facilities

Quick Start Guide

For facility managers and technicians using Zylergy Facilities on iPad, iPhone and the web console



SAMPLE DATA.

ZYLERGY

Zylergy, Inc.
Lewes, Delaware zylergy.com

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Release 1.0 · October 2026

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Revision history

REVISION	DATE	DESCRIPTION
A	October 2026	First issue for Release 1.0.

About this guide

Who this guide is for

This guide is for facility managers and technicians who are new to Zylergy Facilities. It takes you from your first sign-in through one complete job. The facility manager reads a rooftop unit's asset brain on the walk-through and routes its preventive maintenance from the office. A technician services the unit and captures proof. The facility manager then checks the compliance entry the job writes. The guide assumes you know how to run a building and service its equipment. Administrators should start with the *Zylergy Facilities Admin Guide*. For all daily tasks, see the *Zylergy Facilities Operator Guide*.

How this guide is organized

- Chapter 1, "Safety information," gives the safety messages for using Zylergy Facilities in a building.
- Chapter 2, "Before you start," explains what Zylergy Facilities does, how the app and the web console divide the work, and what you need before you sign in.
- Chapter 3, "Sign in and set up," covers your first sign-in on iPad or iPhone, camera access, the parts of the app and the web console, and device settings.
- Chapter 4, "Your first job," follows one preventive maintenance job from the walk-through to the compliance entry.
- Chapter 5, "Where to go next," points to your next tasks, tells you where to get help, and lists common problems.
- The Glossary defines the terms used in this guide. The Index follows it.

Documentation set

DOCUMENT	NUMBER	FOR
Zylergy Facilities Quick Start Guide (this guide)	ZY-FAC-QSG-01	New users: first sign-in and a first job
Zylergy Facilities Operator Guide	ZY-FAC-OPG-01	Everyday work in the app and the web console, and a reference for every screen
Zylergy Facilities Admin Guide	ZY-FAC-ADG-01	Administrators: account, users and roles, the Company Brain, integrations, data and security

Conventions

CONVENTION	MEANING	EXAMPLE
Bold	A label on the screen: a button, tab, menu item, field or status, written exactly as the screen shows it	Tap **Start the checklist**.
`Monospace`	A value you type or read: serial numbers, readings, codes, document numbers	Enter `118`.
A > B	A path through menus or settings	**Menu** > **Offline & pack**
Italic	The title of another document, or a term at the point where it is defined	*Zylergy Facilities Admin Guide*
Sample data.	Every screen in this guide shows sample data	Figure captions

Procedures are numbered steps. Do the steps in order. Each step is one action. Some procedures start with a **Before you begin** box that lists what must be ready first. Most end with a **Result** line that tells you what you see when the procedure worked. The line under a procedure title tells you who does the task and on which device.

This guide uses four kinds of notice:

⚠ WARNING

Indicates a hazardous situation which, if not avoided, could result in death or serious injury. A warning states the hazard, what can happen, and how to avoid it.

⚠ CAUTION

Indicates a situation which, if not avoided, could result in minor or moderate injury, damage to equipment, or the loss or corruption of records.

> NOTE
> Information that helps you complete the task or understand its result.

> TIP
> A faster or easier way to do something.

Send us your comments

To report an error or suggest an improvement to this guide, write to hello@zylergy.com. Include the document number (ZY-FAC-QSG-01), the revision (A) and the page number.

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1

CHAPTER 1

Safety information

IN THIS CHAPTER

- General safety messages 1
- Regulated and life-safety equipment 2
- Content in the app and in this guide 3

Read this chapter before you use Zylergy Facilities in a building. The safety messages in this chapter apply to the tasks in this guide. A message that applies to one step appears in the procedure, just before that step.

> NOTE
>
> Zylergy Facilities presents information from the equipment manufacturer's documentation and from your organization's records. It does not replace the manufacturer's instructions, applicable codes and regulations, your employer's safety procedures, or your training. Where they differ from what you see in the app, follow the manufacturer's instructions and your employer's procedures, and report the difference to your office.

1.1 General safety messages

⚠ WARNING

Hazardous voltage. Contact with energized parts can cause death or serious injury. Before you open any panel or service equipment, disconnect all power, including remote disconnects, follow your employer's lockout/tagout procedure, and verify with a meter that no voltage is present.

⚠ WARNING

Fall hazard. Work on roofs and at height can result in death or serious injury from a fall. Use the fall protection your employer requires. Do not use the app while climbing or moving near a roof edge; stop, secure your position, then use the device.

⚠ CAUTION

Refrigerant under pressure. Refrigerant can cause frostbite and injury, and venting it is prohibited. Only technicians certified under EPA Section 608 may handle refrigerant. Recover refrigerant as required by federal, state and local regulations.

⚠ CAUTION

Distraction near moving or energized equipment. Looking at a screen near rotating, energized or hot equipment can cause injury. Read the step, put the device in a secure place, then do the work.

⚠ CAUTION

Wrong equipment. Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

1.2 Regulated and life-safety equipment

Only qualified people may service or inspect elevators, fire pumps, fire dampers, fire alarm panels and similar systems. The messages below apply to any job on this equipment.

⚠ WARNING

Regulated work requires a qualified person. Elevator, fire protection and other regulated inspections and repairs must be performed by a person who holds the required credential. Zylergy Facilities records credentials and blocks unqualified assignments, but it does not authorize anyone to enter a hoistway, pit or machine room. Follow the access rules of the building and the requirements of the governing authority.

⚠ WARNING

Moving machinery and falls in the hoistway. Elevator equipment can start without warning, and the hoistway and pit present fall and crushing hazards that can cause death or serious injury. Only qualified elevator personnel may enter the machine room, hoistway or pit. Follow the elevator manufacturer's procedures and your employer's lockout/tagout procedure.

> **⚠ CAUTION**
>
> **Fire protection impairment.** Taking a fire pump, sprinkler system, damper or alarm out of service reduces the protection of the building and its occupants. Notify the building owner, the monitoring company and the authority having jurisdiction as your impairment procedure requires, and restore the system as soon as the work is complete.

1.3 Content in the app and in this guide

The guided checklist for a job is a short list of steps. Each step refers to the page of the manufacturer's manual it comes from. The checklist is not a full repair procedure. Before you do a step, read the manual page it cites, including any cautions on that page. If the app shows no caution for a step, check the manufacturer's documentation anyway. A caution can still apply.

When the app shows a reading as within its acceptance range, it has compared the reading with the range in the manufacturer's documentation. This is not a diagnosis of the equipment.

> NOTE
>
> The procedure text in figures is sample content. Always use the current manufacturer's documentation for the equipment you service.

2

CHAPTER 2

Before you start

IN THIS CHAPTER

- What Zylergy Facilities does 4
- The walk-through and the office 5
- What you need 5
- What works without a signal 6

2.1 What Zylergy Facilities does

Zylergy Facilities shows the details of each asset in your buildings and what is due on it. It also records who did each job, when, with what credential and with what proof.

- **Identify the asset.** Scan the asset's *QR tag* with your iPad or iPhone, or point the camera at the asset. You confirm the asset before anything opens.
- **Read the asset brain.** The *asset brain* shows the asset's identity and specifications, manuals, purchase invoice, maintenance log and compliance status.
- **See what is due.** The *work queue* lists preventive maintenance from the manufacturer's intervals, compliance obligations such as elevator inspections and refrigerant logs, and warranty events.
- **Route the work.** Create a work order from the queue. Route it to an in-house technician, to a contractor you work with, or to the marketplace. Work that needs a certified person cannot go to someone who has no matching credential on file.
- **Prove the work.** The technician follows a short guided checklist that links each step to its manual page, and captures photos and readings. The job cannot be completed until the required proof is in.
- **Keep the compliance record.** When a work order closes, Zylergy Facilities writes its *compliance entry*: who did the work and with what credential, when, what was done, and the proof. You can export an *audit pack* for an asset or a site at any time.

2.2 The walk-through and the office

You use the Zylergy Facilities app in the building and the web console in the office. Most facility managers use both.

Table 2-1 Where you work

PART	WHO USES IT	WHAT IT IS FOR
The Zylergy Facilities app on iPad or iPhone	Facility managers on the walk-through, in-house technicians and contractors' technicians	Scanning assets, reading their asset brains, and doing the work at the asset with proof.
The web console in a browser	Facility managers in the office, dispatchers, compliance officers and administrators	The work queue, work orders and routing, the compliance record and audit packs, the portfolio overview, and account administration.

On the *walk-through*, you go around the building with the app and scan each asset you pass. At each asset, the app shows the asset's details and what is due. In the office, the web console lists what is due across your building or your portfolio, with the most urgent items first.

The app uses the same layout, sign-in and settings as Zylergy Field and Zylergy Solar.

2.3 What you need

Table 2-2 What you need before you sign in

ITEM	DETAILS
An invitation from your organization	Your administrator adds you to Zylergy Facilities and sends a join link to your work email.
An iPad or iPhone	With iPadOS or iOS 26 or later. For scanning assets and doing the work at the asset.
The Zylergy Facilities app	Download it from the App Store and install it on your iPad or iPhone.
A computer with a supported browser	For the web console. Use a current version of Google Chrome, Microsoft Edge, Safari or Firefox.
A network connection for the first sign-in	Signing in needs a signal. After that, scanning, the asset brain and the guided checklist also work offline ("What works without a signal" on page 6).

Camera access	Used to scan QR tags and identify assets. You can search for an asset instead if you do not allow it.

2.4 What works without a signal

Mechanical rooms, roofs and elevator machine rooms often have no coverage. Without a signal, you can still scan a QR tag, open the asset brain, and follow a guided checklist with its readings and photos. Signing in and the web console need a signal.

While you are offline, the app shows **Offline — will sync** and saves your work on the device. When the connection returns, the app synchronizes the work, and the compliance entry is written.

3

CHAPTER 3

Sign in and set up

IN THIS CHAPTER

- Sign in for the first time 7
- Allow the camera 9
- Find your way around the app 10
- Sign in to the web console 10
- Display and device settings 11

3.1 Sign in for the first time

The sign-in screen asks only for your work email (Figure 3-1). What happens next depends on how your organization has set up sign-in.

ALL USERS · IPAD OR IPHONE · NEEDS A SIGNAL

BEFORE YOU BEGIN

- The Zylergy Facilities app is installed on your iPad or iPhone.
- Your organization has invited you, and you know the work email address the invitation was sent to.
- Your device has a network connection.

1. Open the Zylergy Facilities app.
2. In **Work email**, enter your work email address.
3. Tap **Continue**.
4. If your organization uses single sign-on, sign in on your company's sign-in page when it opens.
5. If the app asks for a 6-digit code, enter the code from your text message, email or authenticator app.
6. When the app offers Face ID for next time, choose whether to use it.

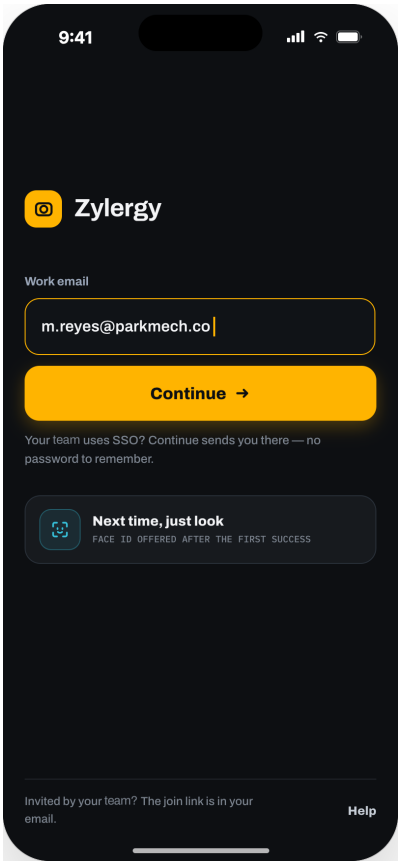


Figure 3-1 The sign-in screen. Sample data.

RESULT

You are signed in, and the app asks for camera access ("Allow the camera" on page 9).

> NOTE
>
> If the app says that it does not recognize your address, check the email address you entered. If it is correct, ask your administrator to invite you.

3.2 Allow the camera

Zylergy Facilities asks for camera access once, at first run (Figure 3-2). It asks for notification access later, when it first needs it.

ALL USERS · IPAD OR IPHONE

1. Read the first-run screen.
2. Tap **Enable the camera**.
3. When iPadOS or iOS asks for permission, allow camera access.

RESULT

The Home screen opens.

If you do not want to allow the camera now, tap **Not now — I'll type it in**. You can then find assets by searching for their asset ID, location or class. To allow camera access later, use the Settings app on your device.

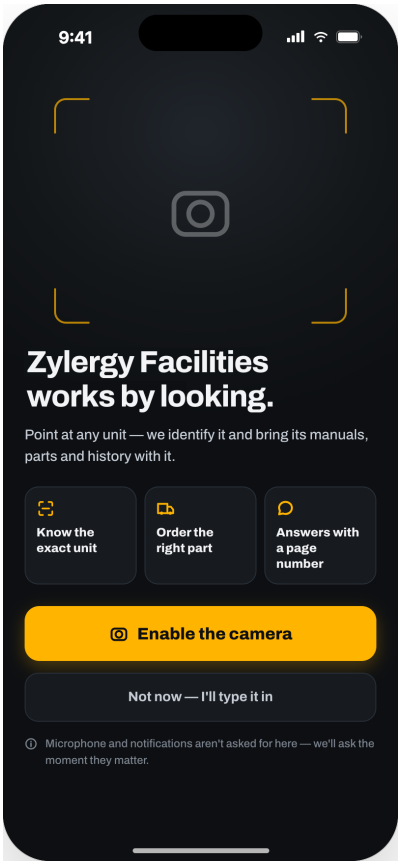


Figure 3-2 The first-run screen asks for camera access. Sample data.

3.3 Find your way around the app

Most work in the app starts when you scan the asset in front of you.

Table 3-1 The main parts of the app

PART	WHAT IT IS FOR
Home	The work orders assigned to you, work you paused under **Pick up where you left off**, and what changed since you last looked.
Scan	Opens the camera to scan a QR tag or identify an asset.
Your work orders	The work orders routed to you.
Menu	Manuals, notifications, your account and settings, and **Help**.
The asset brain	Opens after you scan and confirm an asset. Tasks on an asset start here.

3.4 Sign in to the web console

Facility managers, dispatchers, compliance officers and administrators work in the web console. Technicians do not need it for the first job.

FACILITY MANAGER, DISPATCHER, COMPLIANCE OFFICER, ADMINISTRATOR · WEB CONSOLE · NEEDS A SIGNAL

1. In a supported browser, go to the web console address your administrator gave you.
2. Enter your work email address.
3. Click **Continue**.
4. If your organization uses single sign-on, sign in on your company's sign-in page.
5. If the console asks for a 6-digit code, enter the code from your text message, email or authenticator app.
6. If you belong to more than one organization, choose the one you want to work in.
7. If you chose an organization, click **Continue**.

RESULT

The web console opens. The header shows the tabs **Overview**, **Queue**, **Assets**, **Compliance** and **Sites**, and the building you are working in.

3.5 Display and device settings

Your device settings are in **Menu**, under your account. They affect only you. Your administrator manages your roles and your organization's settings in the web console.

Table 3-2 Device settings

SETTING	WHAT IT DOES
Glove	Makes controls larger and easier to hit with gloves on.
Text LG	Uses a larger text size.
Contrast	Increases contrast for glare and low light.
Dark, **Daylight**, **Baseline**, **Auto**	Color schemes. **Auto** follows the ambient light, for example dark in a mechanical room and daylight in bright sun on the roof. Tap a scheme to keep it.
Read QR / barcode first	Looks for a QR tag or barcode before trying to identify the asset from what the camera sees.
Notifications	Push notifications when something needs you, an optional daily digest, and quiet hours.

4

CHAPTER 4

Your first job

IN THIS CHAPTER

- Scan and confirm the asset 13
- Read the asset brain and what is due 14
- Find the PM in the work queue 14
- Create the work order and review the task package 15
- Route the work order to the in-house technician 17
- Start the guided checklist 17
- Work through the checklist and record readings 18
- Capture proof and complete the job 19
- See the compliance entry 20

Your first job is the quarterly preventive maintenance (PM) on a rooftop unit, RTU-4 in the figures. Two people do it in four parts:

- **A. Walk-through (facility manager, app):** scan the rooftop unit's QR tag, confirm the asset, and read its asset brain and what is due.
- **B. Office (facility manager, web console):** find the PM in the work queue, create the work order, review the task package and route it to an in-house technician.
- **C. At the asset (in-house technician, app):** scan and confirm the asset, follow the guided checklist, record readings, capture proof and complete the job.
- **D. Office (facility manager, web console):** see the compliance entry the job wrote.

⚠ WARNING

Fall hazard. Work on roofs and at height can result in death or serious injury from a fall. Use the fall protection your employer requires. Do not use the app while climbing or moving near a roof edge; stop, secure your position, then use the device.

4.1 Scan and confirm the asset

On the walk-through, you identify each asset by scanning its QR tag. The asset brain opens only after you confirm the asset (Figure 4-1).

FACILITY MANAGER · IPAD OR IPHONE · WORKS OFFLINE

1. Tap **Scan**.
2. Point the camera at the asset's QR tag. The app shows the asset the tag is registered to: its asset ID, class and location.

> **⚠ CAUTION**
>
> **Wrong equipment.** Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

3. Compare the asset ID on the screen with the ID on the tag, and the make, model and serial number with the asset's nameplate.
4. If anything does not match, do not continue: scan again, or search for the asset by its asset ID, location or class.
5. If everything matches, confirm the asset.

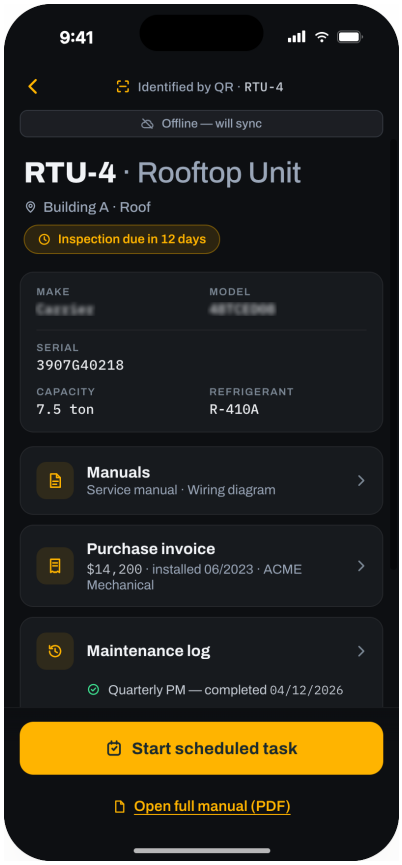


Figure 4-1 The asset brain for a rooftop unit identified by its QR tag. Sample data.

RESULT

The asset brain opens, marked **Identified by QR** with the asset ID.

If an asset has no tag, point the camera at the asset itself. If the app is not certain which asset it sees, it offers a choice of assets or a search. You confirm the asset in either case before the asset brain opens.

4.2 Read the asset brain and what is due

The asset brain shows the record, documents and history of one asset (Figure 4-1). On the walk-through, use it to see what is coming due.

Table 4-1 What is on the asset brain

AREA	WHAT IT SHOWS
Header	How the asset was identified, for example **Identified by QR**, and **Offline — will sync** when you have no signal.
Title and location	The asset ID and class, and where the asset is, for example a building and its roof.
Status	The asset's compliance status and the next item due.
Identity	**Make**, **Model**, **Serial**, and specifications such as **Capacity** and **Refrigerant**.
Manuals	The manuals and drawings for the asset, such as the service manual and the wiring diagram.
Purchase invoice	The invoice, with the purchase price, the installation date and the installer.
Maintenance log	Completed maintenance, newest first.
Start scheduled task	Starts the guided checklist for the work order assigned to you on this asset.
Open full manual (PDF)	Opens the asset's manual.

The maintenance intervals on the asset brain come from the manufacturer's documentation. The items due on the asset also appear in the work queue in the web console, so you do not need to write them down. The next part of the job happens there.

4.3 Find the PM in the work queue

The work queue lists the obligations for your building: preventive maintenance, compliance obligations and warranty events (Figure 4-2). An *obligation* is work that must be done on an asset by a due date. It comes from a governing authority, such as the manufacturer's interval or a code.

FACILITY MANAGER · WEB CONSOLE

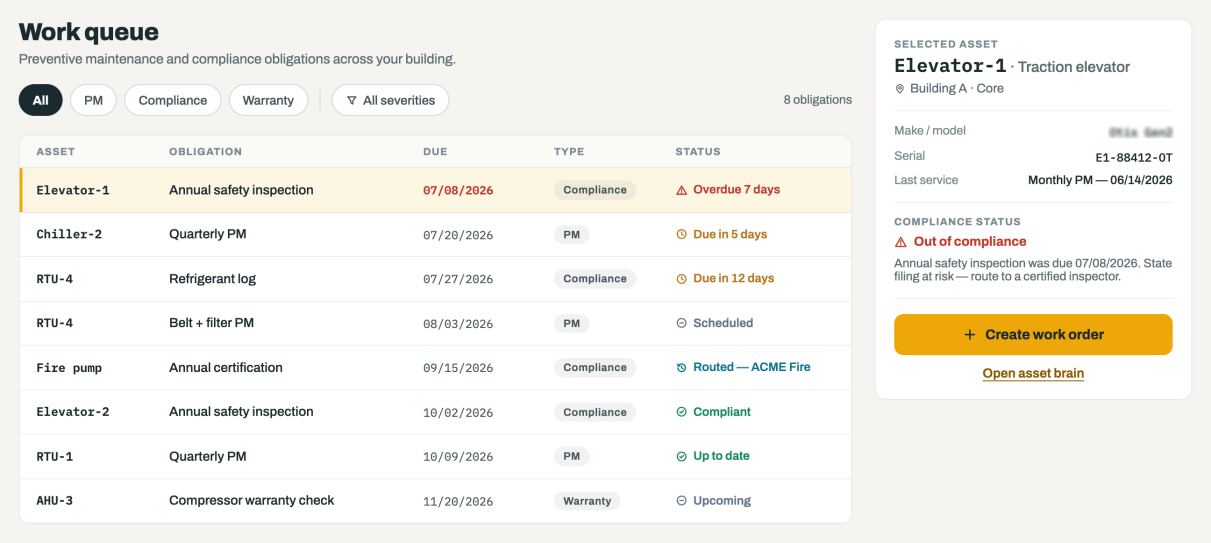


Figure 4-2 The work queue, with an overdue elevator inspection selected. Sample data.

1. In the header, check that the building selector shows your building.
2. Click **Queue**.
3. Click **PM** to show preventive maintenance only.
4. Select the row for the asset's PM. The side panel shows the asset under **Selected asset** and its status under **Compliance status**.

RESULT

The PM is selected, and the side panel offers **Create work order** and **Open asset brain**.

Each row shows the **Asset**, the **Obligation**, when it is **Due**, its **Type** and its **Status**. The type is **PM**, **Compliance** or **Warranty**. The status reads, for example, **Due in 5 days**, **Scheduled** or **Overdue 7 days**. Overdue items stand out from items that are only due soon.

4.4 Create the work order and review the task package

A *work order* assigns the work to someone. When you create one from the queue, Zylergy Facilities builds its *task package* from the asset brain. The task package holds the scope of the work and a short checklist. Each checklist item names the manual page it comes from (Figure 4-3).

FACILITY MANAGER · WEB CONSOLE

1. In the side panel, click **Create work order**. The **New work order** page opens with the asset, the obligation and its due date at the top.
2. Under **Task package**, read the scope.

3 Check the checklist items and the manual page each one cites.

RESULT

The task package is ready to go to the person who will do the work. The checklist appears on that person's device.

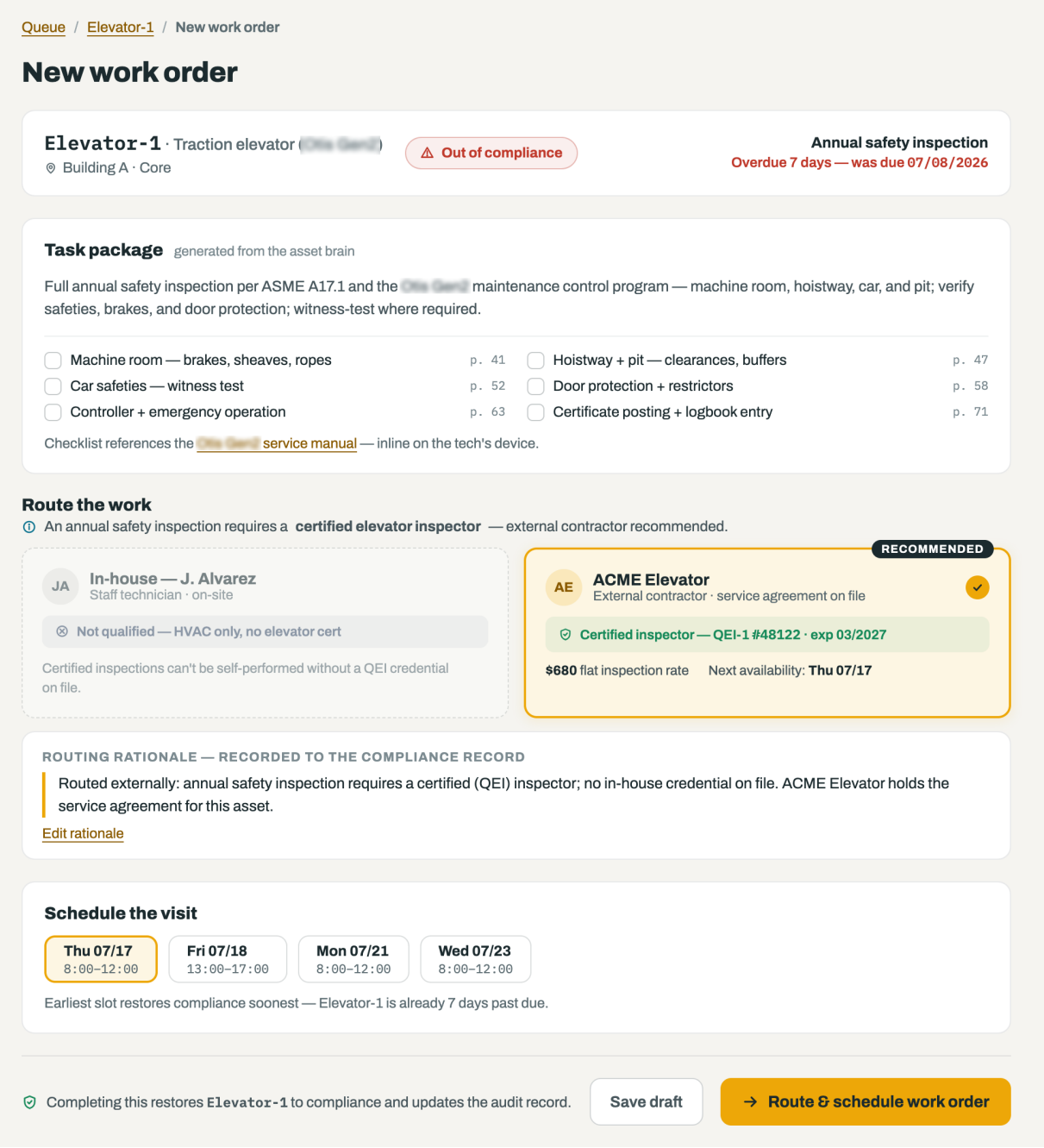


Figure 4-3 A new work order for an elevator inspection: the in-house technician is blocked and a certified contractor is recommended. Sample data.

4.5 Route the work order to the in-house technician

Routing assigns the work order to an in-house technician or to a contractor. Zylergy Facilities checks each option against the *credentials* the work requires. In Figure 4-3, an elevator inspection needs a certified inspector. The in-house technician is blocked, and a contractor with the credential on file is recommended. A quarterly PM on a rooftop unit needs no special credential, so you can route it to your own technician.

FACILITY MANAGER · WEB CONSOLE

1. Under **Route the work**, read the recommendation.
2. Select the in-house technician.
3. Under **Routing rationale — recorded to the compliance record**, read the reason for the choice.
4. If you want to change the reason, click **Edit rationale**.
5. Enter the new reason.
6. Under **Schedule the visit**, select a slot.
7. Click **Route & schedule work order**.

RESULT

The work order is routed and scheduled. In the work queue, the PM shows its new status, and the work order appears in the technician's app.

The *routing rationale* is written to the asset's compliance record and appears in the audit pack. If you are not ready to route, click **Save draft**. The work order is kept, and you can come back to it later.

4.6 Start the guided checklist

At the asset, the technician first scans and confirms the asset, as on the walk-through.

IN-HOUSE TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

BEFORE YOU BEGIN

- The work order has been routed to you.
- You are at the asset, with the fall protection your employer requires.

1. Tap **Scan**.
2. Scan the asset's QR tag.

> **⚠ CAUTION**
>
> **Wrong equipment.** Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

3. Compare the asset ID with the tag, and the make, model and serial number with the nameplate.
4. If anything does not match, do not continue: search for the asset, and tell your facility manager.
5. If everything matches, confirm the asset. The asset brain opens.
6. Tap **Start scheduled task**.

RESULT

The guided checklist for the work order opens, with the title of the job at the top (Figure 4-4).

4.7 Work through the checklist and record readings

The *guided checklist* lists the steps of the job. Each step links to the manual page it comes from (Figure 4-4). A bar at the top shows how many steps are done.

IN-HOUSE TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

> **⚠ WARNING**
>
> **Hazardous voltage.** Contact with energized parts can cause death or serious injury. Before you open any panel or service equipment, disconnect all power, including remote disconnects, follow your employer's lockout/tagout procedure, and verify with a meter that no voltage is present.

1. For the first unfinished step, tap its manual page link.
2. Read the page.
3. Do the work the step describes.
4. Mark the step done.
5. Repeat steps 1 to 4 until you reach the step that asks for readings.

> **⚠ CAUTION**
>
> **Refrigerant under pressure.** Refrigerant can cause frostbite and injury, and venting it is prohibited. Only technicians certified under EPA Section 608 may handle refrigerant. Recover refrigerant as required by federal, state and local regulations.

6. Take the measurements the step asks for.
7. Enter each value, for example in **Suction (PSI)** and **Head (PSI)**. The app checks each value against the acceptance range shown under the fields.

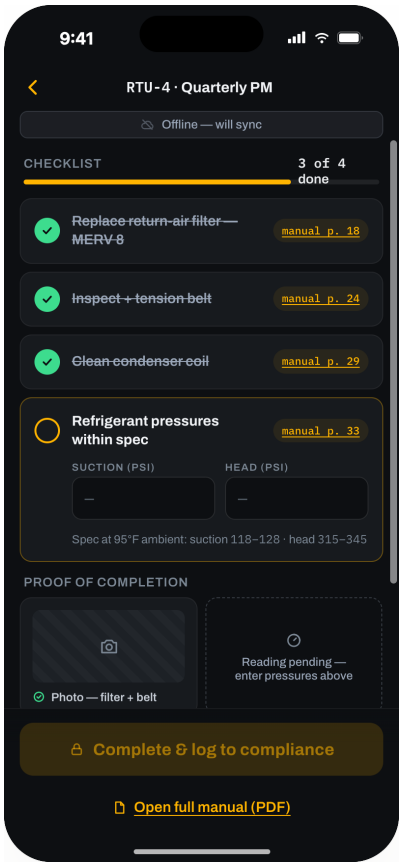


Figure 4-4 The guided checklist with the readings still to enter. Sample data.

RESULT

The steps are done and the readings are recorded on the device.

The *acceptance range* under a reading comes from the manufacturer's documentation, for example suction and head pressures at a given outdoor temperature. If a reading is out of range, record the value you measured and tell your facility manager.

4.8 Capture proof and complete the job

Proof is the set of photos and readings a job requires. The *verification gate* keeps a job from being completed until its proof is captured. Under **Proof of completion**, each tile shows one item of proof and whether it has been captured. **Complete & log to compliance** shows a lock and stays unavailable until all items are in (Figure 4-4).

IN-HOUSE TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

1. Under **Proof of completion**, tap the photo tile.
2. Take the photo the tile asks for, for example of the new filter and belt.
3. Check that the reading tile shows your readings.
4. Tap **Complete & log to compliance**.

RESULT

The job is verified and its outcome is written to the asset's compliance record. If you are offline, the job is held on the device and sent when you are back online.

Your facility manager, and later an auditor, sees the proof you captured.

4.9 See the compliance entry

Back in the office, the facility manager checks the result on the compliance record (Figure 4-5). Zylergy Facilities wrote the entry when the job closed.

FACILITY MANAGER · WEB CONSOLE

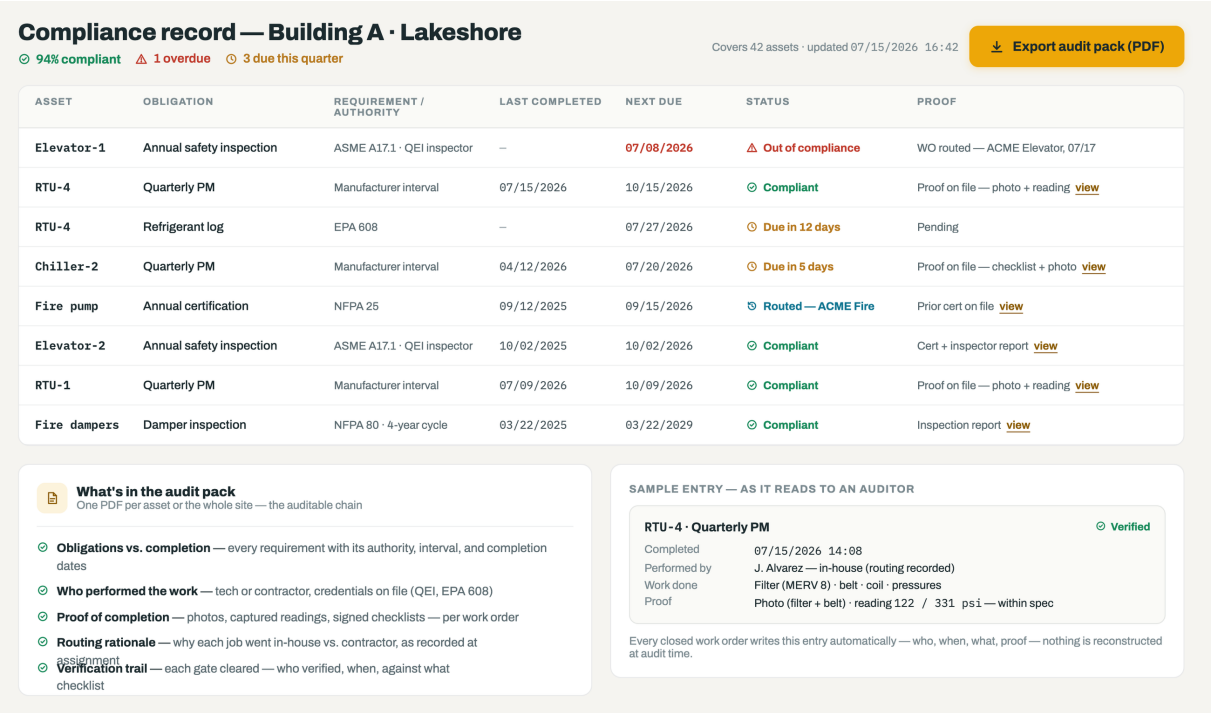


Figure 4-5 The compliance record with a completed quarterly PM. Sample data.

1. Click **Compliance**.
2. Find the row for the asset's PM. The row shows **Compliant**, the date in **Last completed**, the new date in **Next due**, and the proof on file.

3 In the **Proof** column, click **view**.

RESULT

The compliance entry shows when the work was completed, who performed it, the work done and the proof, marked **Verified**.

The *compliance record* holds the compliance entries for the building. It is append-only, so entries can be added but not edited or deleted. When an auditor, an insurer or the building owner asks for proof, click **Export audit pack (PDF)**. The audit pack shows the obligations against their completion, who did the work, the proof, the routing rationale and the verification trail.

You have completed your first job. The next person who scans RTU-4 sees today's work in its maintenance log.

5 CHAPTER 5

Where to go next

IN THIS CHAPTER

- Common next tasks 22
- Get help 23
- Troubleshooting 23

5.1 Common next tasks

Table 5-1 Where each task is covered

TO DO THIS	SEE
Identify an asset by pointing the camera at it, or work hands-free	*Zylergy Facilities Operator Guide* (ZY-FAC-OPG-01), chapter “The walk-through”
Route work to a contractor or the marketplace, and award a bid	*Zylergy Facilities Operator Guide* (ZY-FAC-OPG-01), chapter “Creating and routing work orders”
Export an audit pack, a regulatory pack or an attestation	*Zylergy Facilities Operator Guide* (ZY-FAC-OPG-01), chapter “The compliance record and audit packs”
See compliance across all your sites	*Zylergy Facilities Operator Guide* (ZY-FAC-OPG-01), chapter “Portfolio overview”
Receive and bid on work as a contractor	*Zylergy Facilities Operator Guide* (ZY-FAC-OPG-01), chapter “For contractors”
Invite people, tag assets, add manuals, and set schedules and obligations	*Zylergy Facilities Admin Guide* (ZY-FAC-ADG-01)

5.2 Get help

- In the app, tap **Menu** > **Help**.
- For your account, your roles or the assets you can see, ask your administrator.
- For a problem with the product, contact Zylergy support in the app (**Menu** > **Help**) or at support@zylergy.com, Monday through Friday, 8 a.m. to 6 p.m. US Central time.

5.3 Troubleshooting

Table 5-2 Troubleshooting

WHAT YOU SEE	WHY	WHAT TO DO
“Sign-in needs a signal”	Signing in needs a network connection.	Move to where you have coverage, or use Wi-Fi. Work already on the device opens read-only until you sign in.
No camera view on **Scan**	Camera access is not allowed.	Search for the asset instead, or allow camera access for Zylergy Facilities in the Settings app on your device.
The asset on the screen does not match the tag or the nameplate	The tag is on the wrong asset, or the asset record is wrong.	Do not continue. Search for the asset by its ID or location, and tell your facility manager so the tag or the record can be corrected.
The QR tag will not scan	The tag is damaged, dirty or not registered.	Search for the asset by its ID, location or class. Tell your facility manager so the tag can be replaced or registered.
Complete & log to compliance is unavailable	Proof is still missing.	Check each tile under **Proof of completion** and capture what it asks for.
You cannot see an asset or a work order	Your access does not include that asset.	Ask your administrator. You see only the assets you are authorized for.

Glossary

acceptance range

The range a measured reading must fall within to count as in spec, for example `110–130 PSI`. Each range comes from the manufacturer's documentation.

administrator

The person who manages users, sign-in, settings, integrations and support access, and reviews documents uploaded to the company's library. The matching role is **Admin**. In a small company the shop owner may also be the administrator.

append-only

A record that can be added to but never edited or deleted. A correction is written as a new entry linked to the original.

asset

A serviceable piece of equipment in a building, such as a rooftop unit, chiller, air handler, elevator or fire pump, registered in Zylergy Facilities.

asset brain

Everything Zylergy Facilities knows about one asset in one place: identity and specifications, manuals, purchase invoice, maintenance log and compliance status. You open it by scanning the asset's QR tag.

asset record

The registry entry for one piece of equipment: make, model, serial number, location, who owns it, specifications and history. In Zylergy Facilities the asset brain is built on the asset record.

attestation

A scheduled statement of an operation's compliance status, produced from the compliance record for a building owner or an authority.

audit pack

A PDF that Zylergy Facilities exports for an asset or a site. It shows obligations against completed work, who did the work and with what credential, the proof captured, the routing rationale and the verification trail.

award

The facility manager's choice of the bid that wins a marketplace work order. The awarded contractor gains access to the asset.

bid

A contractor's offer to carry out a work order published to the marketplace.

building selector

The control at the right of the web console header that shows and changes the building you are working in.

citation

A link from an answer, a repair step or a checklist item to the page of the document it came from. Tap a citation to open the page with the passage highlighted.

compliance entry

The record Zylergy Facilities writes automatically when a job closes: who did the work and with what credential, when, what was done, and the proof.

compliance officer

The person who owns regulatory packs and attestations across a portfolio. Works in the web console with the **Back office** role.

compliance record

All compliance entries for an asset or a site, shown on the **Compliance** tab of the web console. It is append-only.

contractor

An outside company, such as an elevator or mechanical service firm, that carries out work routed to it under a service agreement, with access limited to the assets it is authorized for.

credential

A certification a person must hold to perform regulated work, such as a QEI elevator inspector credential or EPA 608 certification. Zylergy Facilities uses credentials on file to decide who can be assigned a job.

dispatcher

The person who schedules and routes work.

EPA 608

The US Environmental Protection Agency certification required to handle refrigerants under Section 608 of the Clean Air Act.

facility manager

The person who runs maintenance and compliance for a building or portfolio, walking the building with the app and working in the web console.

governing authority

The code, standard or regulation an obligation comes from, such as ASME A17.1 or NFPA 25.

guided checklist

The step-by-step checklist a technician follows on the Zylergy Facilities app, with links to the manual pages for each step and the proof the step requires.

in-house technician

A technician employed by the facility operator, as opposed to a contractor's technician.

lockout/tagout

The procedure of isolating equipment from its energy sources, locking and tagging the isolation point, and verifying zero energy before work begins.

manufacturer's documentation

Installation, operation, service and parts documents published by the equipment manufacturer.

marketplace

The Zylergy Facilities function through which qualified contractors receive requests for proposal, submit bids and are awarded work.

nameplate

The plate or label on equipment that carries its make, model, serial number and ratings.

obligation

A maintenance, inspection, compliance or warranty requirement on an asset, with a due date and a governing authority. Obligations feed the work queue.

offline

Working without a network connection. Work you record offline is saved on the device and synchronized when the connection returns.

preventive maintenance (PM)

Scheduled maintenance carried out at set intervals to keep equipment in service, such as a quarterly PM.

proof

The photos and readings a technician must capture before a Zylergy Facilities job can be completed.

QR tag

A label with a QR code bound to one asset record. Scanning it opens that asset.

reading

A measured value recorded for a checklist item, such as suction pressure, checked against its acceptance range as you enter it.

regulatory pack

A compliance pack assembled for a regulation or authority across sites, as distinct from the audit pack for one asset or site.

role

What a user can do in Zylergy: **Admin**, **Back office**, **Field tech** or **Customer**, given per user by the administrator. A user can hold more than one role.

routing

Assigning a work order to an in-house technician or a contractor. Zylergy Facilities blocks assignments that would give certified work to someone without the required credential.

routing rationale

The recorded reason for a routing decision. It is written to the compliance record and appears in the audit pack.

site

A location that groups assets: a building or campus in Zylergy Facilities, a homeowner's property in Zylergy Solar.

sync

The transfer of changes between your device and Zylergy when a connection is available.

task package

The scope, checklist and manual pages that Zylergy Facilities generates from the asset brain for a work order, so the person doing the work has what they need.

technician

A person who works at the equipment with the app. The matching role is **Field tech**.

verification gate

The check that keeps a job from being completed until its proof has been captured.

verification trail

The sequence of proof and approvals behind a completed job, as shown in the audit pack.

walk-through

The facility manager's round of the building with the app on iPad or iPhone, scanning assets and reviewing what is due at each one.

web console

The browser-based part of a Zylergy product, used by the back office instead of the app.

work order

An assignment of work on an asset or site to a technician or contractor.

work queue

The list of work that needs attention, sorted so the most urgent comes first: in Zylergy Facilities, obligations and due work; in Zylergy Field, approvals, reviews, exceptions and overdue maintenance.

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