ZYLERGY

ADMIN GUIDE

Zylergy Field

Admin Guide

For administrators and shop owners setting up and running Zylergy Field for an HVAC service shop

ZYLERGY

Zylergy, Inc.
Lewes, Delaware zylergy.com

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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 the people who set up and run a shop's Zylergy Field account. The administrator holds the **Admin** role and looks after users, roles, entitlements, shop settings, integrations, security and support access. The administrator also reviews the documents uploaded to the shop's library and publishes checklist templates. The shop owner works with the **Back office** role and sets up the shop's maintenance schedules, service plans and purchasing rules. In many shops the shop owner is also the administrator. The guide follows the order in which a new shop sets up, and assumes you know your shop's business and systems. Day-to-day work in the app and the web console, including the shop owner's dashboard, supervision and approvals, is described in the *Zylergy Field Operator Guide*.

How this guide is organized

- Chapter 1, "Administration overview," covers who sets up what, a setup checklist and where each setting is.
- Chapters 2 and 3 cover the shop record, customers and sites, the shared terminal, users, roles and entitlements.
- Chapter 4, "The Company Brain: the document library," covers documents, access levels, review and entitlements.
- Chapters 5 to 7 cover maintenance setup, the service-plan catalog and purchasing setup.
- Chapter 8, "Integrations and API," covers sign-in, parts suppliers, system-of-record integrations, connectors and the API.
- Chapters 9 to 12 cover data, privacy and security, audit and export, billing and subscription, and Zylergy support access.
- Appendix A describes what each role does. Appendix B lists the settings and where they are.
- The Glossary defines the terms used in this guide. The Index follows it.

Documentation set

DOCUMENT	NUMBER	FOR
Zylergy Field Quick Start Guide	ZY-FLD-QSG-01	New users: first sign-in and a first job
Zylergy Field Operator Guide	ZY-FLD-OPG-01	Everyday work in the app and the web console, and a reference for every screen
Zylergy Field Admin Guide (this guide)	ZY-FLD-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 Field 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-FLD-ADG-01), the revision (A) and the page number.

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1

CHAPTER 1

Administration overview

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- The administrator and the shop owner 1
- Setup checklist 2
- Where settings live 4
- Plan roles in your shop 5
- Roll out Zylergy Field to your shop 5

1.1 The administrator and the shop owner

Each person in your shop has one or more roles: **Admin**, **Back office** or **Field tech**. The administrator assigns them. Customers who use the customer portal hold the **Customer** role. Table 1-1 shows who usually sets up what.

Shop owner and administrator are two separate jobs. In a small shop one person often does both and holds the **Back office** and **Admin** roles.

Table 1-1 Who sets up what

JOB	ROLE	SETS UP
Administrator	**Admin**	Users and their roles, entitlements, the shop record and branches, the shared terminal, customer portal access, integrations and connectors, security, and Zylergy support access. Also reviews documents uploaded to the shop's library and publishes checklist templates.
Shop owner and office staff	**Back office** (the shop owner often also holds **Admin**)	Maintenance schedules and reminders, watch-list rules, the service-plan catalog, approval thresholds, pricing, sourcing and payment. Office staff also handle orders, returns and credits.
Technician	**Field tech**	Personal settings in the app only

Each person sets their own app settings in the app and their web console settings in **My settings**. Shop settings are in the web console only.

Each topic starts with a line that names the role and the surface (app or web console) for the task.

1.2 Setup checklist

Set up a new shop in this order.

Table 1-2 Setup checklist

STEP	TASK	WHO	COVERED IN
1	Sign in to the web console and open **Organization & access**	**Admin**	Chapter 2
2	Check the shop record: name, branches, billing contact	**Admin**	Chapter 2

STEP	TASK	WHO	COVERED IN
3	Connect your field-service system, if you use one, with your shop's own credentials to bring in customers, sites, units and jobs.	**Admin**	Chapter 8
4	Set up customers, sites and units that do not come from another system	**Back office**	Chapter 2
5	Invite people and assign their roles	**Admin**	Chapter 3
6	Give technicians the entitlements your shop holds	**Admin**	Chapter 3
7	Upload your shop's own manuals	**Back office** or **Admin**	Chapter 4
8	Review the uploads, set their access, and publish checklist templates for the models you service	**Admin**	Chapter 4, Chapter 5
9	Set maintenance schedules, reminders and watch-list rules	**Back office**	Chapter 5
10	Build and publish service plans	**Back office**	Chapter 6
11	Set approval thresholds, EPA 608 records, markup, pricing, sourcing and payment	**Back office**	Chapter 7
12	Turn on the shared terminal and customer portal access, if you use them	**Admin**	Chapter 2
13	Ask technicians to install the app and sign in	**Field tech**	*Zylergy Field Quick Start Guide*

1.3 Where settings live

Table 1-3 Where settings live

PLACE	WHO USES IT	WHAT IS THERE	COVERED IN
App: **Menu** > **Account, shop & role**	Each user, for themselves	Appearance, camera and scan, offline storage, notifications, units and formats	Appendix B
Console: **My settings**	Each user, for themselves	Appearance, density, landing page, email and digests, formats	Appendix B
Console: **Organization & access**	**Admin**	Users and roles, entitlements, shop record, shared terminal	Chapter 2, Chapter 3
Console: **Documents**	**Back office** and **Admin**. **Admin** handles review and access rules.	The document library, uploads, review, access and entitlements	Chapter 4
Console: **Maintenance**	**Back office**. **Admin** handles checklist templates.	Checklist templates, schedules and reminders, the watch list	Chapter 5
Console: **Service Plans**	**Back office**	The service-plan catalog	Chapter 6
Console: purchasing settings	**Back office**	Approval thresholds, certifications, markup, pricing, sourcing, payment	Chapter 7
Console: integration settings	**Admin**	System-of-record integrations, connectors, the API	Chapter 8

1.4 Plan roles in your shop

Before you invite anyone, decide who gets which role. Base the choice on the work each person does.

Table 1-4 Typical role plans

SHOP	ADMIN	BACK OFFICE	FIELD TECH
A shop owner and a few technicians	The shop owner	The shop owner	Each technician
A shop with an office	An office manager, an IT contact or the shop owner. Office staff who review uploaded documents or checklist templates also need **Admin**.	The shop owner, and office staff who handle scheduling, approvals, orders, returns and credits	Each technician. A lead technician can also be an order approver.
A larger shop with branches	A dedicated administrator	The shop owner, branch managers and the accounts team	Each technician

Decide these at the same time:

- **Approvers.** Who approves orders above your thresholds, and who backs them up (Chapter 7).
- **Reviewers.** Who reviews manuals uploaded to your shop's library. Reviewers need the **Admin** role (Chapter 4).
- **Entitlements.** Which manufacturer authorizations your shop holds. Zylergy can then assign the matching entitlements before technicians need the documents (Chapter 3).

1.5 Roll out Zylergy Field to your shop

Table 1-5 Rollout checklist

WHEN	WHO	DO THIS
Before technicians start	**Admin**	Complete steps 1 to 6 of the setup checklist. Check that each technician is invited with the **Field tech** role and has the right entitlements.

Before technicians start	**Back office**	Upload the manuals your shop relies on that are not in Zylergy's curated library.
Before technicians start	**Admin**	Review those uploads, and publish checklist templates for the models on the first routes.
First day	**Field tech**	Install the app from the App Store, sign in, allow the camera, and pack the day over Wi-Fi. The *Zylergy Field Quick Start Guide* covers a first job.
First day	**Back office**	Sign in to the console, choose the shop, and set **My settings**.
First week	**Back office**	Watch the work queue. Adjust schedules and reminders.
First week	**Admin**	Watch the review queue and publish the manuals technicians capture.
When ready	**Admin**	Turn on the shared terminal and invite customers to the customer portal.

2

CHAPTER 2

Account and shop

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- Sign in as an administrator 7
- Organization and access 8
- The shop record 9
- Customers, sites and units 9
- Turn on the shared terminal 10
- The customer portal 11
- Other shop settings 12
- Problems with the shop setup 12

The *shop* is your contracting company as it is set up in Zylergy Field, with its people, branches, customers and entitlements.

2.1 Sign in as an administrator

ADMIN · WEB CONSOLE

You sign in to the web console like any other user. For the steps, see the *Zylergy Field Operator Guide* (ZY-FLD-OPG-01), chapter “Back-office work in the web console.” With the **Admin** role, the console opens on the console home.

Shop settings are on **Organization & access**. Open it from your avatar. The top of **My settings** also points to it.

Use a current version of Google Chrome, Microsoft Edge, Safari or Firefox. Zylergy support can give you the web console address. The console signs you out after a period of inactivity.

2.2 Organization and access

Organization & access is the administrator's page for the shop (Figure 2-1).

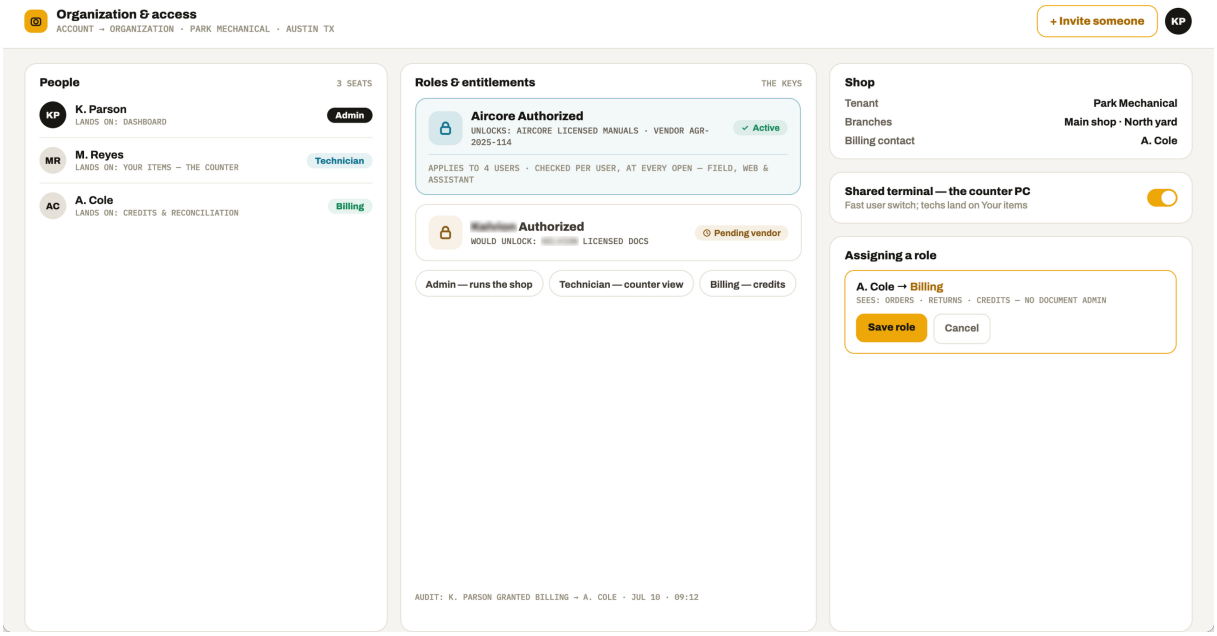


Figure 2-1 Organization and access. Sample data.

Table 2-1 What is on Organization and access

AREA	WHAT IT SHOWS AND DOES
People	The people in the shop, with each person's role and the page the console opens to, and the number of seats. To add a person, click **+ Invite someone** ("Invite someone" on page 14).
Roles & entitlements	The entitlements your shop holds or has applied for, what each one unlocks, and how many users hold it ("Entitlements" on page 15).
Shop	**Tenant** (the shop's name), **Branches** and **Billing contact** ("The shop record" on page 9).
Shared terminal — the counter PC	Turns fast user switching on or off ("Turn on the shared terminal" on page 10).
Role card	Appears when you change a person's roles, with buttons to save or cancel the change ("Assign or change a role" on page 15).

A note at the bottom of the page says that building owners sign in to the customer portal, not to the console.

2.3 The shop record

ADMIN · WEB CONSOLE

The shop record holds the shop's name, its branches and its billing contact.

Table 2-2 Shop record

FIELD	WHAT IT IS
Tenant	Your shop's name as it appears in the app, the console and the customer portal.
Branches	Your shop's locations, such as a main shop and a yard.
Billing contact	The person who receives receipts, invoices and statements.

The shop's legal entity, billing entity and terms are recorded when the account is opened. For payment methods and certificates, see Chapter 7.

2.4 Customers, sites and units

BACK OFFICE OR ADMIN · WEB CONSOLE

Zylergy Field organizes your shop's equipment the way buildings are organized (Table 2-3). Customer and unit are required. Building, floor or zone, system and sub-assembly are optional.

Table 2-3 The equipment structure

LEVEL	WHAT IT IS
Customer	The person or business that owns or uses the equipment, from a homeowner to a portfolio operator
Site	A location the customer owns or operates
Building	A building at the site
Floor or zone	A floor or zone in the building
System	A system the unit belongs to
Unit	One piece of equipment, keyed by make, model and serial number
Sub-assembly	A part of the unit, such as a blower assembly

Within a site, you can also group units by location, system or type. Maintenance schedules and dashboards can be filtered by group.

Units and their structure come into Zylergy Field in three ways:

- **From your field-service system.** With a system-of-record integration (Chapter 8), customers, sites and equipment inventories are read from that system. Changes made in Zylergy Field are written back where the system allows it. Fields your system does not hold are stored in Zylergy Field.
- **From the field.** A technician who scans a unit that is not on the customer's site can add it. See the *Zylergy Field Operator Guide* (ZY-FLD-OPG-01), chapter "Identifying units."
- **In the web console.** The office enters or edits the structure by hand.

When a unit is added, it takes on its model's published checklist template. Its maintenance schedule starts from its install or in-service date ("Schedules and reminders" on page 30).

Shared records and requests to attach

Zylergy Field records a site and its units once, even when several contractors service the site. A shop can serve many customers, and a customer's site can be attached to more than one shop. Each shop sees only the records it is attached to and entitled to.

A technician from another shop may scan a unit at a site your shop created. That shop can then send a *request to attach*. Your shop approves or declines the request. If the customer holds the site record, the request goes to the customer in the customer portal instead.

Until the request is approved, the other shop sees only the unit's identity. Approval attaches that shop to the site with its own entitlements and no more. Approval does not override manufacturer content restrictions. The request, the decision, the approver and the time are recorded.

2.5 Turn on the shared terminal

The *shared terminal* is a desk computer, such as the one at the parts counter, set up for fast user switching. People switch to their own session with a tile and a 4-digit PIN instead of signing in with their email. Technicians who switch in see **Your items** first.

ADMIN · WEB CONSOLE

1. Open **Organization & access**.
2. Turn on **Shared terminal — the counter PC**.
3. On the shared computer, sign in.
4. Set up the computer as the shared terminal.
5. Ask each person who will use the terminal to set a 4-digit PIN.

RESULT

The shared computer shows a tile for each person (Figure 2-2). When the terminal is idle, it locks and shows the tiles again.

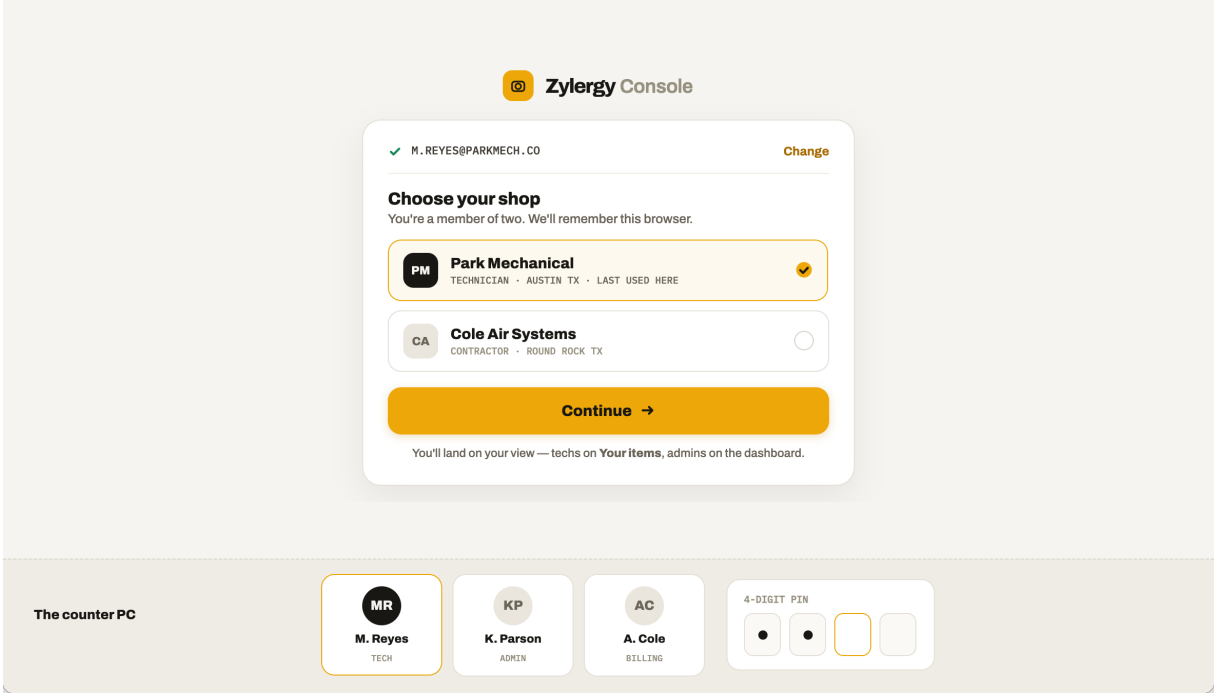


Figure 2-2 Console sign-in, with the shared terminal below. Sample data.

To stop fast user switching, turn the setting off. People then sign in with their email as usual.

2.6 The customer portal

ADMIN · WEB CONSOLE

The *customer portal* gives your customers read-only pages. Customers see their units, visit records and reports there. They also approve plans, quotes and requests to attach. In the console, the section is labeled **Owner Portal**. Customers sign in to the portal, not to the console, and see only their own sites.

A customer with several properties can switch between them. Your shop can send building owner and compliance reports to customers on a schedule. The *Zylergy Field Operator Guide* (ZY-FLD-OPG-01), chapter “The customer portal,” shows what customers see.

2.7 Other shop settings

These shop settings are also in the web console (Table 2-4).

Table 2-4 Other shop settings

SETTING	WHAT IT IS
Default label printer	The printer that return labels go to
Building owner report schedule	When building owner and compliance reports go to customers
Default delivery destination	Where parts orders ship unless the technician chooses another destination (“Delivery and returns defaults” on page 41)
Voice input	Whether technicians can use voice commands

2.8 Problems with the shop setup

Table 2-5 Problems with the shop setup

WHAT YOU SEE	WHY	WHAT TO DO
A technician scans a unit and sees it is not on the site’s roster	The unit has not been added to the customer’s site.	Let the technician add it from the field, or add it in the console. Then complete its details.
Units or customers are missing after you connect your field-service system	The integration has not finished reading, or the records are not in that system.	Check the status of the integration. Add any missing records in your field-service system or in the console.
Another shop asks to attach to one of your sites	A technician from that shop scanned a unit at the site.	Approve or decline the request. Until you approve, the other shop sees only the unit’s identity.
The shared terminal does not show someone’s tile	The person is not set up for the terminal.	Check the person under **People**. Ask them to set their PIN.
A customer cannot sign in to the customer portal	The customer has not been given access.	Give the customer access to the portal.

3 CHAPTER 3

Users and roles

IN THIS CHAPTER

- Roles 13
- Invite someone 14
- Assign or change a role 15
- Entitlements 15
- Approvers and certifications 16
- Audit of users and roles 16
- Problems with users and roles 16

Each person in your shop has one or more roles. The roles set what the person can do and where the web console opens for them. Entitlements set which licensed manufacturer documents a person can read.

3.1 Roles

Table 3-1 Roles in Zylergy Field

ROLE	WHO HAS IT	WHAT THEY DO
Admin	The administrator. In a small shop, often the shop owner.	Works in the web console: users, roles, entitlements, shop settings, integrations, security and support access. Reviews documents uploaded to the shop's library and publishes checklist templates.

Back office	The shop owner and the office staff, including the people who handle orders, returns and credits	Works in the web console: schedules, supervision, approvals, quotes, customers, service plans, purchasing, orders, returns, credits and reports.
Field tech	Technicians	Works in the app. Uses **Your items** in the web console for desk tasks, such as printing a return label.
Customer	Building owners, property managers and facility managers who use the customer portal. They are outside your shop's staff.	Uses the customer portal: sees their own units, visit records and reports, read-only, and approves what is waiting for them.

One person can hold more than one role. A shop owner who is also the administrator holds **Back office** and **Admin**, and can do what both allow.

In the web console, an Admin starts on the console home (**Dashboard**) and a Field tech starts on **Your items**. Each person can choose a different start page under **My landing** in **My settings**. Appendix A describes what each role does.

Roles apply across the product, including documents, checklists, orders, maintenance and condition data.

Customers are not part of your shop's staff. They use the customer portal with the **Customer** role, and they also approve work on the technician's device. Zylergy staff do not appear in your shop's list of people.

3.2 Invite someone

ADMIN · WEB CONSOLE

1. Open **Organization & access**.
2. Click **+ Invite someone**.
3. Enter the person's work email address.
4. Choose the person's roles.
5. Send the invitation.

RESULT

The person appears under **People** with their roles and receives an email with a join link. When they sign in for the first time, they join your shop.

If a person tries to sign in before they are invited, the app tells them it does not see their address at a shop yet. Zylergy support can resend invitations (Chapter 12).

3.3 Assign or change a role

ADMIN · WEB CONSOLE

1. Open **Organization & access**.
2. Under **People**, click the person.
3. Select the roles the person needs: **Admin**, **Back office** or **Field tech**.
4. Save the change.

RESULT

The person's roles change. The change is recorded with who made it and when.

When a person is removed from the shop, their records, such as service log entries and orders, stay in the shop's history.

3.4 Entitlements

Some manufacturer documents are licensed only to authorized service partners. In Zylergy Field, that authorization, for example a manufacturer's authorized-dealer status, is an *entitlement*. Entitlements control access to licensed documents. The administrator gives them to people as entitlement roles. Entitlement roles are separate from the four roles ("Roles" on page 13).

- **Your shop holds an entitlement only when Zylergy assigns it.** Zylergy assigns it based on the shop's agreement with the manufacturer.
- **You give your own technicians the entitlements your shop holds.** You cannot give anyone more than the shop holds.
- **Entitlement is checked every time a person opens a document**, in the app, in the web console and by the assistant. The assistant answers only from documents the person is entitled to read.

On **Organization & access**, **Roles & entitlements** lists each entitlement with what it unlocks, the agreement behind it, its status and how many users hold it. **Active** means the entitlement is in force. **Pending vendor** means your shop has applied and the manufacturer has not yet confirmed.

Give technicians an entitlement

ADMIN · WEB CONSOLE

1. Open **Organization & access**.
2. Under **Roles & entitlements**, click the entitlement.
3. Select the people who should hold it.
4. Save the change.

RESULT

The selected people can read the documents the entitlement unlocks the next time they open them. The change is recorded.

To apply for an entitlement your shop does not hold, contact the manufacturer and Zylergy. When the manufacturer confirms, Zylergy assigns the entitlement and its status changes to **Active**.

3.5 Approvers and certifications

Order approvers and EPA 608 certification records are set up with purchasing (Chapter 7).

3.6 Audit of users and roles

Zylergy Field records each role change, entitlement change and invitation, with who made it and when. Entitlement changes are recorded separately from Zylergy's own content operations. See Chapter 10.

3.7 Problems with users and roles

Table 3-2 Problems with users and roles

WHAT YOU SEE	WHY	WHAT TO DO
A person cannot sign in: "We don't see that address at a shop yet"	They have not been invited, or the invitation went to a different address.	Invite them with the address they use ("Invite someone" on page 14).
A person did not receive the invitation	The email was filtered, or the address was mistyped.	Check the address. Zylergy support can resend invitations.
A technician sees **Not entitled** on a manufacturer document	The technician does not hold the entitlement, or your shop does not.	If your shop holds the entitlement, give it to the technician. Otherwise, apply for it.

An entitlement shows **Pending vendor**	The manufacturer has not yet confirmed your shop's authorization.	Wait for confirmation. Zylergy assigns the entitlement when it arrives.
The console opens on the wrong page for a person	The start page follows the role, or the person's own choice.	Check the person's role. The person can set **My landing** to **Auto by role**.

4

CHAPTER 4

The Company Brain: the document library

IN THIS CHAPTER

- How the library works 19
- The document catalog 19
- Access levels 20
- Attach a document 21
- Review uploads and field captures 22
- Access rules for a document 23
- Entitlement for a document 25
- Manufacturer licensing 26
- What the assistant and checklists draw on 26
- Keep the library current 26
- Problems with documents 27

The *Company Brain* is your organization's knowledge in Zylergy: the manuals, records, notes and photos the product draws on, with controlled access. In Zylergy Field it is the *document library*. The library holds manufacturer and shop documents, each with an access level. The app shows it as **Manuals & documents**, and the web console as **Documents**. The assistant answers from the library and from each unit's service log, and checklists are derived from the library.

4.1 How the library works

- **Documents are attached to equipment models, not to units.** A manual added once serves all units of that model, for each user entitled to it. A document can apply to several models, and a model can have many documents. A document can also be noted for one serial number.
- **Each document has an access level** that sets who can see it (“Access levels” on page 20).
- **Documents are reviewed before use.** Uploads and field captures are held, checked and published before anyone can read them or the assistant can use them.
- **Newer revisions supersede older ones.** The current revision is shown by default. Earlier revisions are kept for history and audit.
- **Licenses can expire.** When a license expires, the document is no longer available. Its history is kept.
- **Access is recorded.** Each time someone opens a licensed document, Zylergy Field records the shop, the entitlement and the time.
- **Schematics follow their document.** Diagrams taken from a document have the same access as the document.

4.2 The document catalog

The catalog lists the documents available to your shop (Figure 4-1).

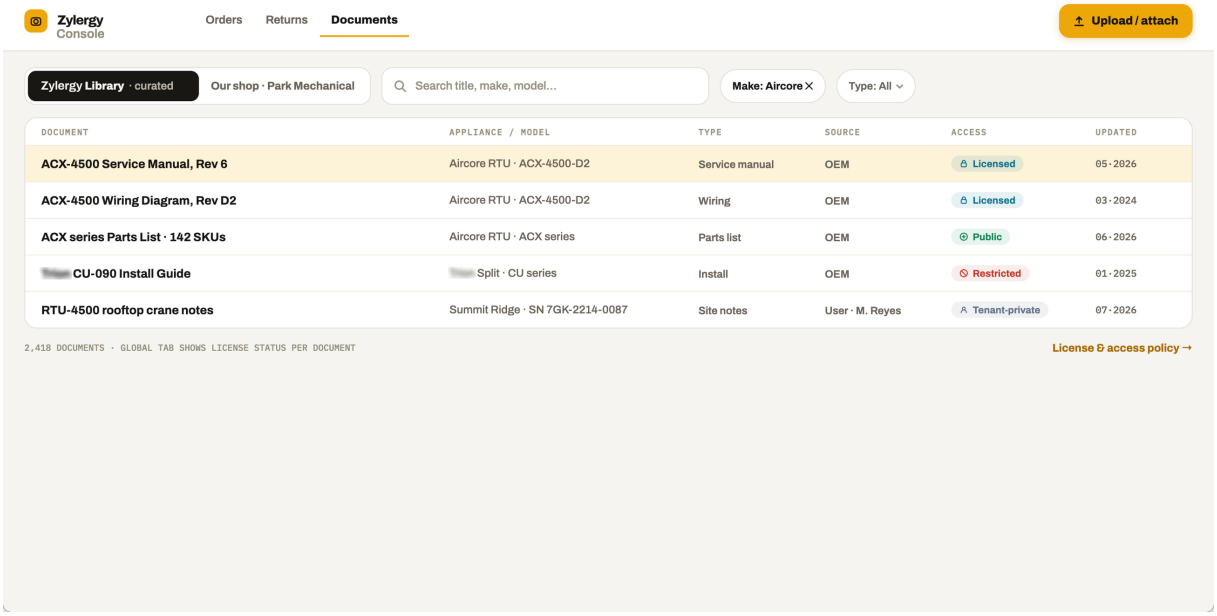


Figure 4-1 The document catalog. Sample data.

BACK OFFICE OR ADMIN · WEB CONSOLE

Table 4-1 What is in the document catalog

AREA	WHAT IT SHOWS AND DOES
Library tabs	The curated document library from Zylergy, and your shop's own documents.
Search and filters	Search by title, make or model. Filter by make and type.
Columns	**Document**, **Appliance / model**, **Type**, **Source**, **Access**, **Updated**.
Upload / attach	Adds a document ("Attach a document" on page 21).
License & access policy	Opens the access rules ("Access rules for a document" on page 23).

The curated tab shows the license status of each document for your shop.

4.3 Access levels

Table 4-2 Document access levels

ACCESS LEVEL	WHO CAN READ IT	SET BY
Tenant-private	Your shop only. This is the default for documents your shop uploads. Use it when there is no license basis to share the document.	Your shop
Shared to firm	All your shop's crews and office.	Your shop
Public	Anyone using Zylergy Field. Used for freely distributable documents.	Zylergy, after verification
Licensed	Only people who hold the named entitlement, in any shop. Others see the title and can request access.	Zylergy, under a manufacturer's agreement

Before a document is published as public or licensed, Zylergy verifies its source, license and revision. When your shop reviews a document, it is published for your shop only.

4.4 Attach a document

Use **Attach a document** to add your shop's own manuals, wiring diagrams, parts lists or site notes to the library (Figure 4-2).

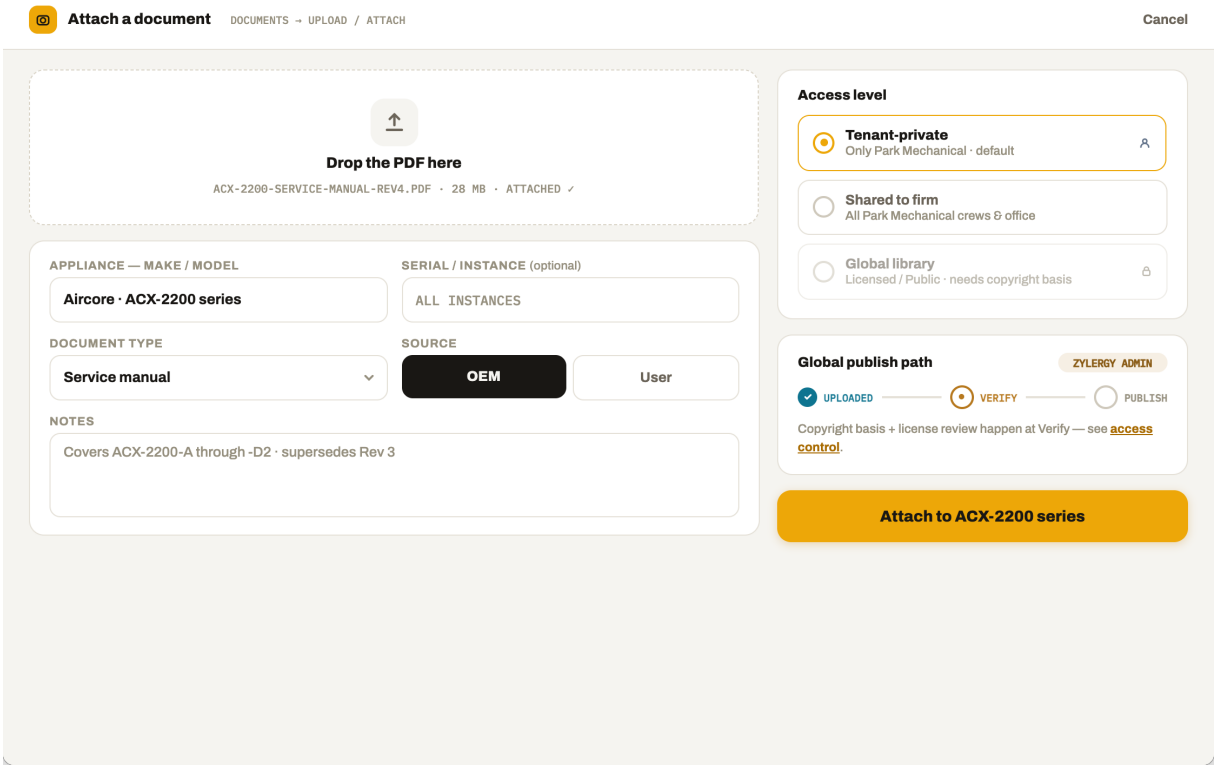


Figure 4-2 Attach a document. Sample data.

BACK OFFICE OR ADMIN · WEB CONSOLE

1. Click **Documents**.
2. Click **Upload / attach**.
3. Drop the PDF into **Drop the PDF here**.
4. Under **Appliance — make / model**, enter the model or series the document covers.
5. If the document is for one unit only, enter its serial number under **Serial / instance**.
6. Choose the **Document type**.
7. Choose the **Source**: **OEM** or **User**.
8. Add notes, for example which revisions the document covers or replaces.
9. Under **Access level**, keep **Tenant-private**, or choose **Shared to firm**.
10. Click the attach button, which names the model.

RESULT

The document is uploaded and waits for review. Once an administrator reviews and publishes it, the document appears in the library for the model, with its access level.

The **Global library** option needs a copyright basis. Zylergy reviews the license before a document can be shared beyond your shop.

4.5 Review uploads and field captures

ADMIN · WEB CONSOLE

Technicians capture manuals in the field, and office staff upload them in the web console. Captures and uploads go to the review queue (Figure 4-3).

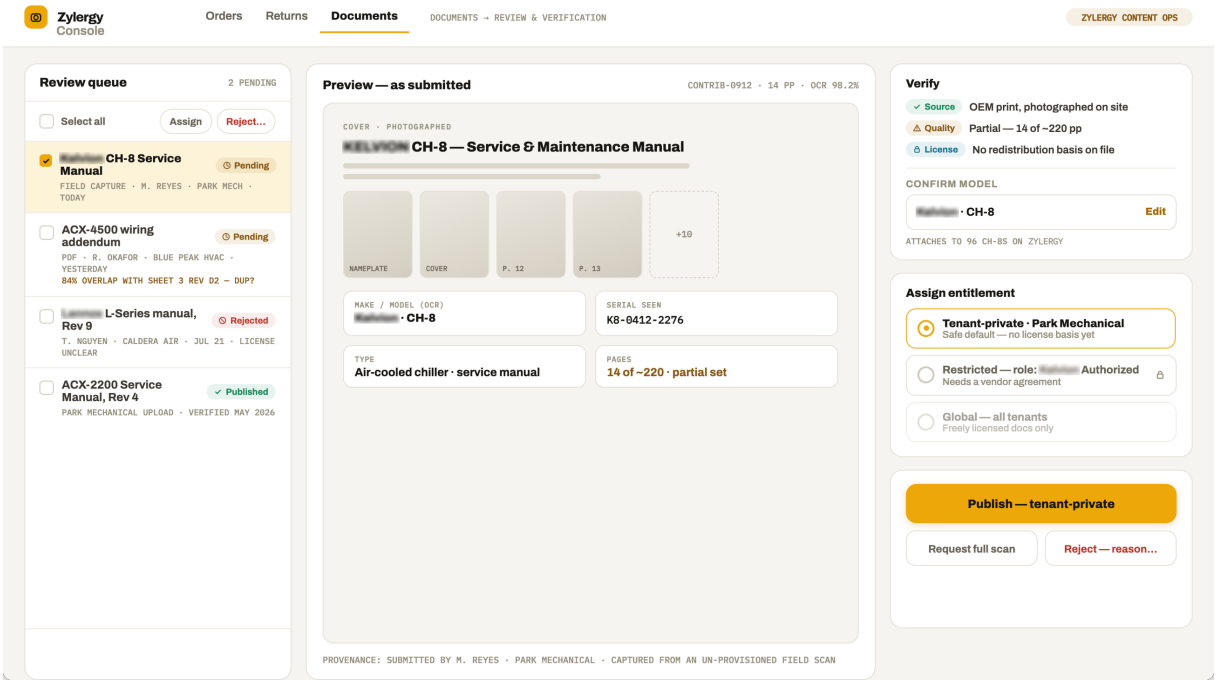


Figure 4-3 The review queue, with a field capture. Sample data.

Who reviews what:

- **An administrator reviews uploads to your shop's library.** In many shops the shop owner or office staff do this with the **Admin** role. The reviewer checks the source, quality and license basis, and confirms the model. The reviewer then publishes the document as **Tenant-private**, or rejects it with a reason. The *Zylergy Field Operator Guide* (ZY-FLD-OPG-01), chapter "Running the shop," describes the procedure.
- **Zylergy verifies documents before they are shared beyond your shop or published under a manufacturer's license.** Zylergy's content team confirms the source and license of a document that is to be public or restricted to a manufacturer's authorization.

Uploads from the console use the form in Figure 4-4. A capture from the field arrives with the form already filled in.

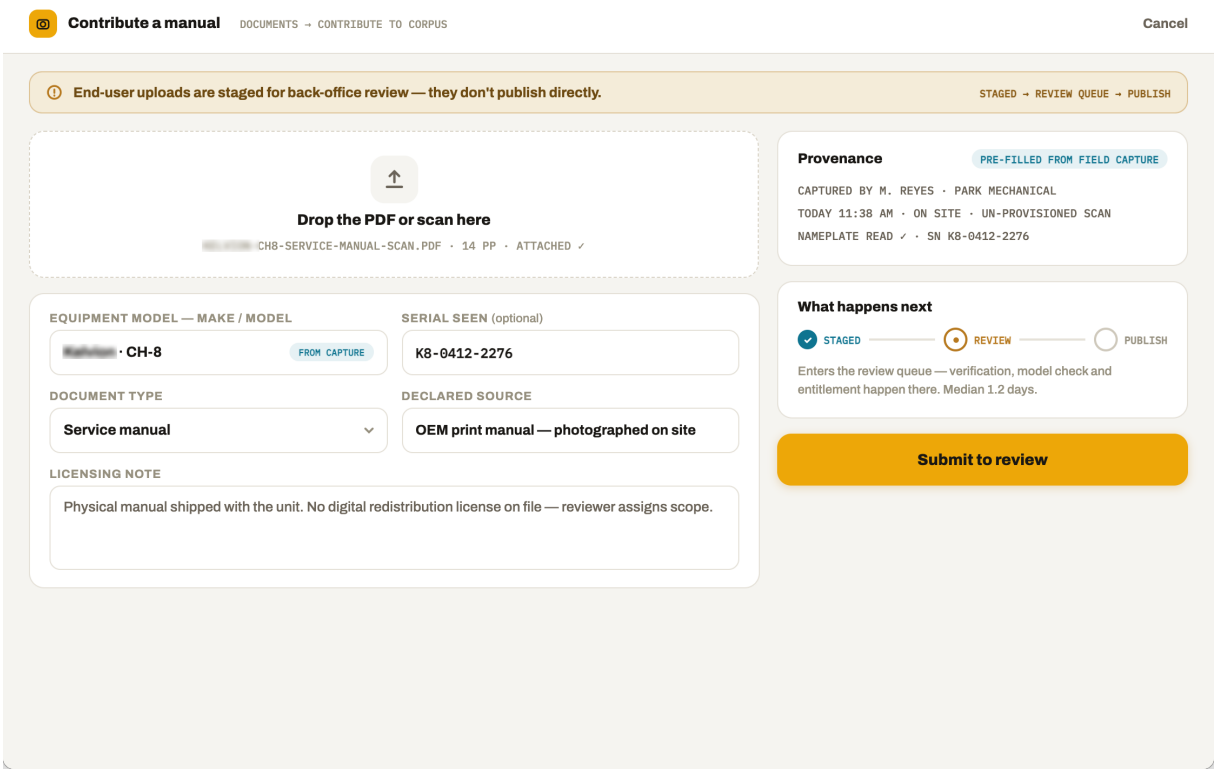


Figure 4-4 Contribute a manual, filled in from a capture. Sample data.

You can assign a review to a reviewer from the work queue. The review queue warns about likely duplicates. When you reject a submission, the submitter is notified with the reason. Each decision is recorded with the reviewer, the decision, the entitlement assigned and the time.

Field reports, the knowledge a technician captures at the point of repair, go through this review too. The *Zylergy Field Operator Guide* (ZY-FLD-OPG-01), chapter “Repairing a unit,” describes how technicians capture them. Each field report carries the contributor’s consent and rights. The assistant does not use a field report until it is published.

4.6 Access rules for a document

Each published document has an access page that shows who can see it and why (Figure 4-5).

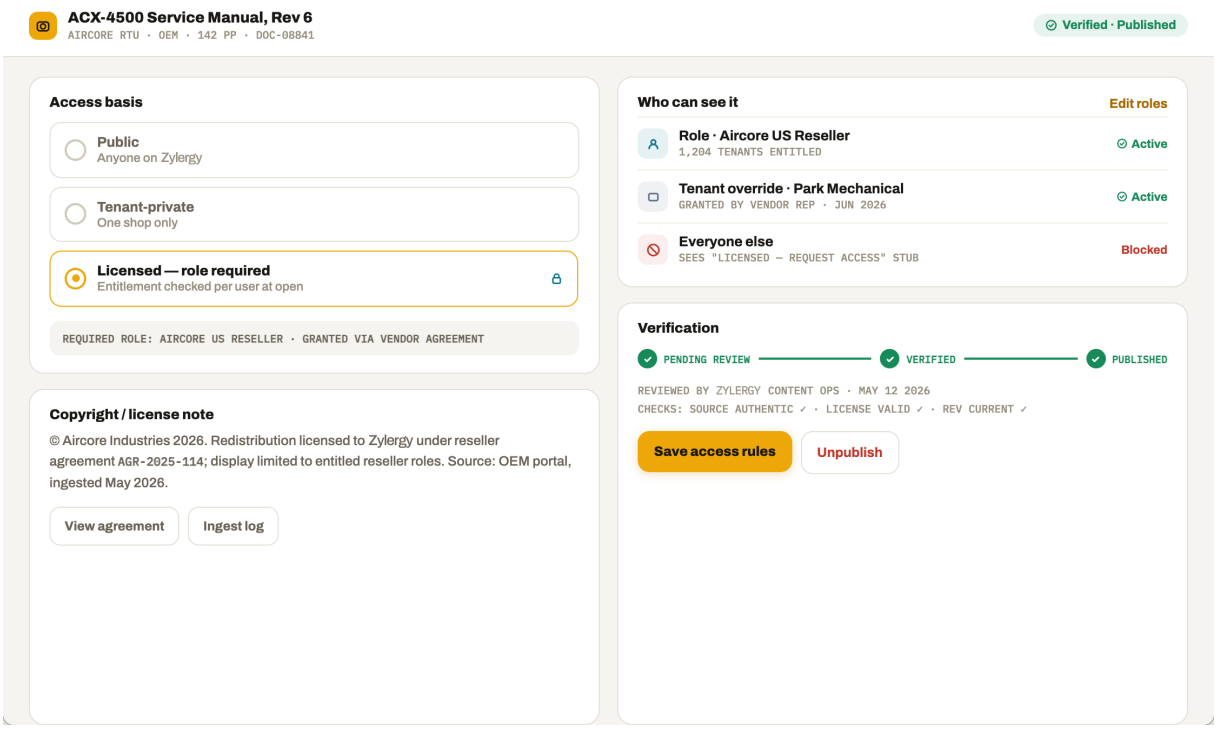


Figure 4-5 Access and copyright for a licensed manual. Sample data.

ADMIN · WEB CONSOLE

Table 4-3 What is on a document's access page

AREA	WHAT IT SHOWS AND DOES
Access basis	**Public**, **Tenant-private** or **Licensed — role required**, with the entitlement that is required.
Who can see it	Each entitlement or shop that can read the document, with its status. **Everyone else** sees a request-access prompt. To change the entitlements, click **Edit roles**.
Verification	The verification steps and the checks: source authentic, license valid, revision current.
Copyright / license note	The license under which the document is shown, with **View agreement** and **Ingest log**.
Save access rules, **Unpublish**	Save changes, or take the document out of the library.

A shop override appears under **Who can see it**, with the name of the person who granted it. For example, a manufacturer's representative can give your shop access to one licensed document. Changes to licensed documents follow the manufacturer's agreement.

4.7 Entitlement for a document

The entitlement page shows how one document is restricted and which models it applies to (Figure 4-6).

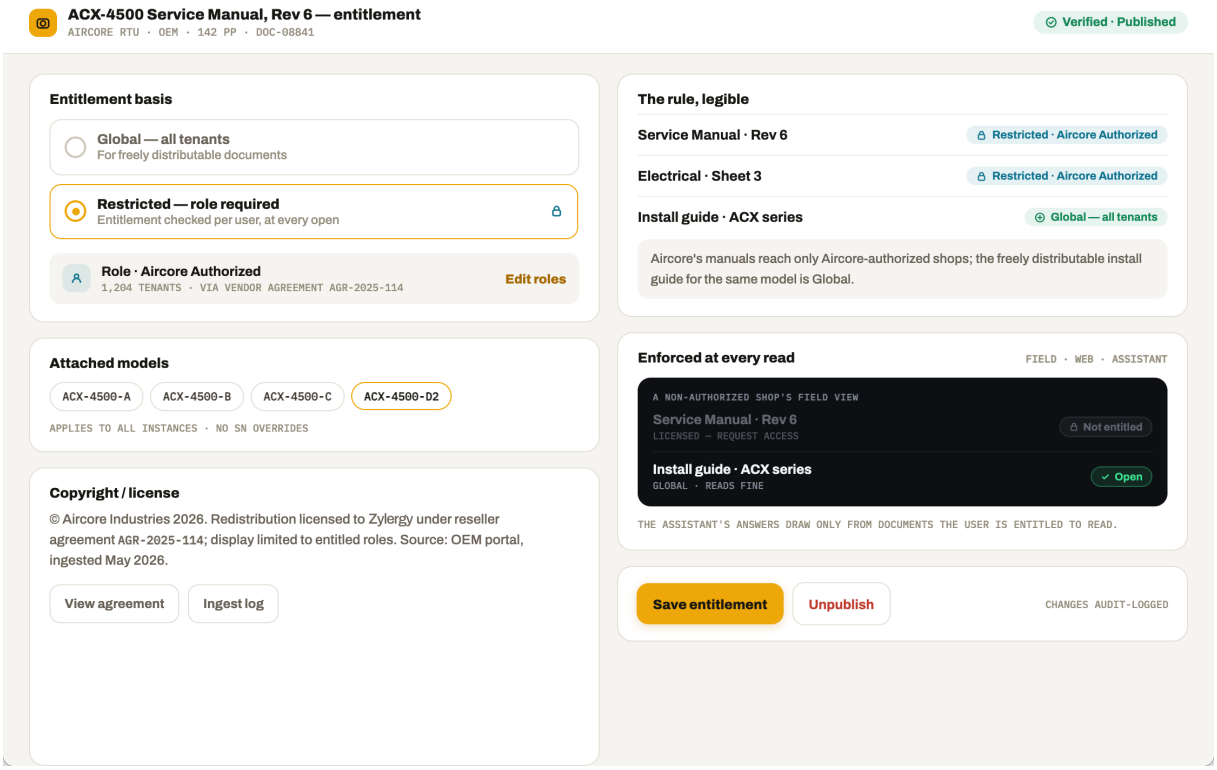


Figure 4-6 The entitlement page for a licensed manual. Sample data.

Table 4-4 What is on a document's entitlement page

AREA	WHAT IT SHOWS AND DOES
Entitlement basis	**Global — all tenants**, for freely distributable documents, or **Restricted — role required**, with the entitlement and the agreement behind it. To change the entitlement, click **Edit roles**.
Attached models	The models the document applies to. It applies to all units of those models.
The rule, legible	The rule in plain words, for this document and related ones.
Enforced at every read	What a person without the entitlement sees: the title, marked not entitled, with request access.
Copyright / license	The license note, with **View agreement** and **Ingest log**.

Save entitlement, **Unpublish**	Save changes, or take the document out of the library. Changes are recorded.

4.8 Manufacturer licensing

Manufacturer documents come into the library under licensing agreements between Zylergy and the rights holders. A manufacturer can restrict its documents to its authorized service partners. Zylergy assigns the matching entitlement to each shop that holds the authorization (“Entitlements” on page 15). Checklists derived from those documents carry the restriction too.

4.9 What the assistant and checklists draw on

Table 4-5 What the library feeds

CONTENT	USED BY	CONDITION
Manuals and service documents for the model	The assistant’s answers and citations, checklist derivation, the document library	Published, and the person is entitled to it
Schematics and illustrations taken from documents	The equipment context, conversation and checklists	Same access as their document
Parts lists and exploded diagrams	The parts catalog for the model	Same access as their document
The unit’s service log	The assistant (recurring faults, earlier work), the unit chart and the unit page	Your shop’s units, and shared records within entitlements
Field reports	The assistant	Reviewed and published, with consent
Web search results	Shown to the technician only, marked as unverified	Never used as a source until captured, reviewed and published

4.10 Keep the library current

ADMIN OR BACK OFFICE · WEB CONSOLE

- **A new revision of a manual.** Attach the new revision for the same model and note what it supersedes. When it is published, it becomes the current revision. The earlier revision

stays available for history and audit. Checklist templates derived from the earlier revision are drafted again from the new one and go to review (“Checklist templates” on page 28).

- **A document that should no longer be used.** Open its access page and click **Unpublish**. The document is removed from the library. Its history is kept.
- **Poor scans.** Scanned pages are read automatically, and poor scans are flagged for review. To ask for a better scan, click **Request full scan** in the review queue.
- **Duplicates.** The review queue warns when a submission overlaps an existing document. Reject duplicates with a reason.

4.11 Problems with documents

Table 4-6 Problems with documents

WHAT YOU SEE	WHY	WHAT TO DO
A technician’s captured manual stays in review	Nobody has reviewed it.	Review it, or assign the review from the work queue.
A document you uploaded is not visible to technicians	It has not been published, or its access level excludes them.	Publish it from the review queue. Check its access level.
A licensed document disappeared	Its license expired.	Ask Zylergy about the license. The document’s history is kept.
You cannot choose **Global library** for an upload	Sharing beyond your shop needs a license basis that Zylergy verifies.	Keep it **Tenant-private** or **Shared to firm**.
The assistant does not use a document you published	The model attachment is wrong, or the person asking is not entitled to it.	Check **Attached models** and the access rules.

5

CHAPTER 5

Maintenance setup

IN THIS CHAPTER

- Checklist templates 28
- Schedules and reminders 30
- Watch-list rules 32
- Condition-based maintenance 33
- Problems with maintenance setup 34

Zylergy Field runs maintenance from checklists derived from manufacturers' service manuals, and computes a schedule for each unit. For day-to-day scheduling and supervision, see the *Zylergy Field Operator Guide* (`ZY-FLD-OPG-01`), chapter "Running the shop."

5.1 Checklist templates

A *checklist template* is a versioned maintenance checklist for one equipment model. Zylergy Field drafts it from the model's service manual. A checklist that has not been approved is not scheduled or run.

Each item has:

- A task, such as checking a pressure or cleaning a coil.
- An interval, from the manual's stated cadence or a manufacturer default.
- A finding type: pass or fail, or a reading with its unit and acceptance range.
- A citation to the page of the manual it came from.

Your shop or Zylergy reviews, corrects and approves each template before it is used. In your shop, an administrator does this. In many shops the shop owner or office staff do it with the **Admin** role.

A template derived from a licensed manual carries the manual's restriction. Only shops entitled to the manual can use it.

Review and publish a checklist template

ADMIN · WEB CONSOLE

BEFORE YOU BEGIN

- The model's service manual is in the library.

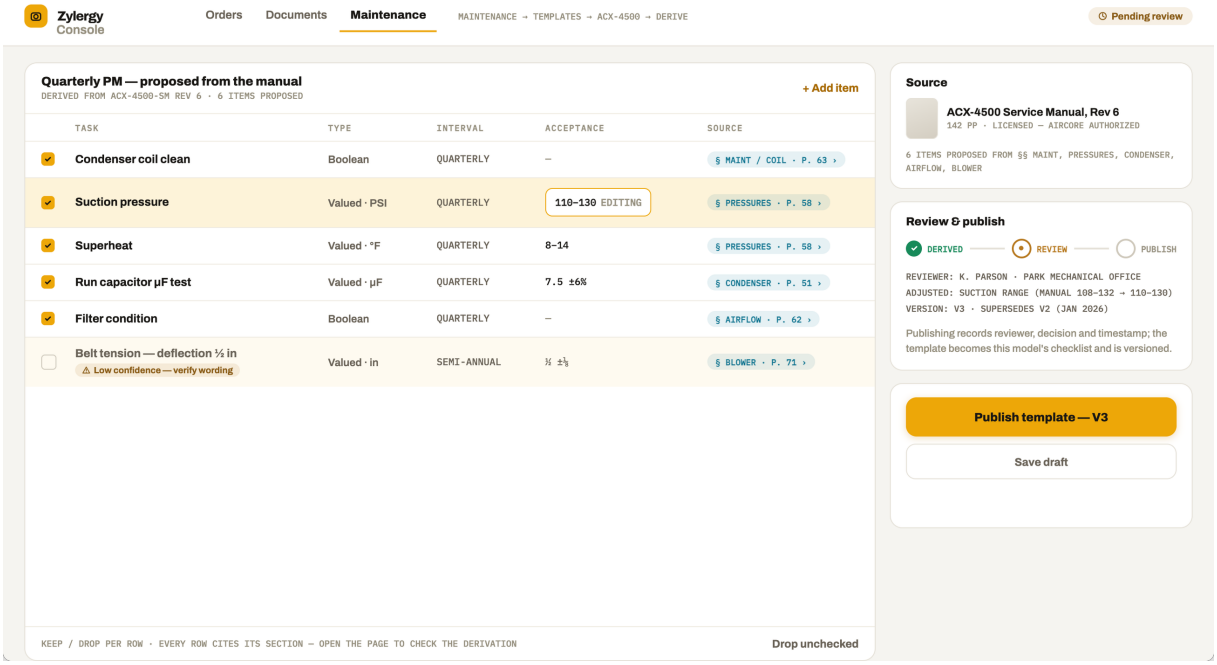


Figure 5-1 A checklist proposed from the manual, for review. Sample data.

1. Click **Maintenance**.
2. Open the template marked **Pending review** for the model. The proposed checklist shows each item with its type, interval, acceptance range and source section (Figure 5-1).
3. For each item, click its source. The manual page opens.
4. Check the item against the page.
5. Correct any wording, interval or acceptance range that needs it. Take extra care with items marked **Low confidence — verify wording**.
6. Clear the check box of any item you do not want, or click **+ Add item** to add one.
7. Click **Drop unchecked** to remove the cleared items.
8. Under **Review & publish**, check the reviewer, the adjustments and the version.
9. Click the publish button, which names the new version, or click **Save draft** to finish later.

RESULT

The template is published as the model's checklist, and the reviewer, the decision and the time are recorded. All units of the model use the new version for their next checklist.

A new version does not change completed work. Earlier checklists stay recorded against the version they were run under. When a manual is revised or a limit is corrected, review the new proposal and publish a new version.

Check each acceptance range against the manual before you publish. A wrong limit is used on all units of the model and can misdirect a technician.

5.2 Schedules and reminders

When a unit is added to your shop, it takes on its model's published template. Its schedule is created from its install or in-service date. Zylergy Field computes the next due date of each item from its interval and the date it was last completed.

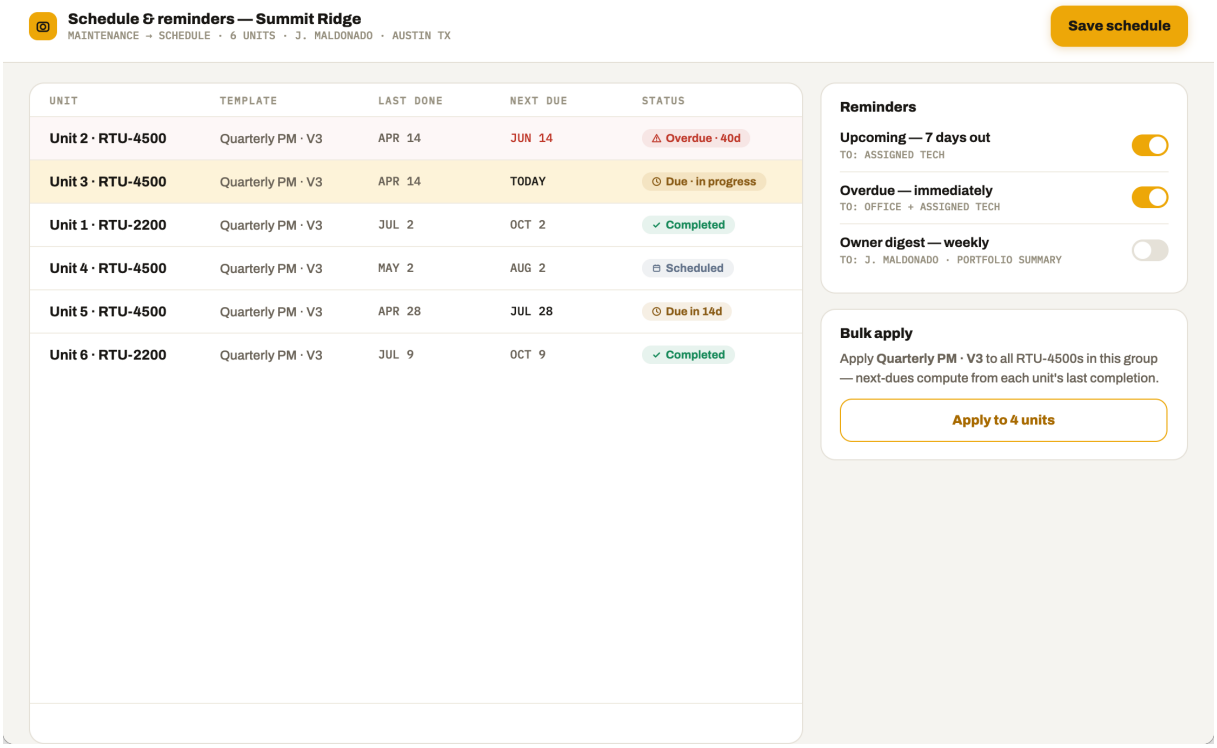


Figure 5-2 Schedule and reminders for a site. Sample data.

BACK OFFICE OR ADMIN · WEB CONSOLE

Table 5-1 Schedule settings

SETTING	WHAT IT DOES	WHERE
Interval	Fixed calendar intervals, or seasonal and manufacturer cadences where the manual specifies them. Comes from the template. You can override it for one unit.	The unit's schedule
Bring forward, defer, skip with a reason, override the interval	Adjusts one unit's schedule. Each change is recorded with its reason.	The unit's schedule
Bulk apply	Applies a template to several units of the model in a group. Next due dates are computed from each unit's last completion.	The site's schedule
Upcoming reminder	Reminds the assigned technician a set time before maintenance is due.	**Reminders**
Overdue reminder	Reminds the office and the assigned technician as soon as maintenance is overdue.	**Reminders**
Owner digest	A weekly summary to the building owner (your customer's contact), not to the shop owner.	**Reminders**

You turn reminders on or off for each site (Figure 5-2). To keep your changes, click **Save schedule**. Schedule views roll up by unit, group and customer, and they feed the maintenance dashboard.

Set up maintenance for new units

BACK OFFICE · WEB CONSOLE

BEFORE YOU BEGIN

- The unit's model has a published checklist template.

1. Add the unit to the customer's site, or let a technician add it from the field.
2. Open the unit page.

3. Check the unit's install or in-service date.
4. Open the site's schedule. The unit is listed with its template and next due date.
5. If the unit should follow a different interval, override it for this unit.
6. Click **Save schedule**.

RESULT

The unit's maintenance is scheduled. Reminders follow the site's settings, and the unit appears on the maintenance dashboard.

If a model has no published template yet, its units appear without a schedule until one is published. To set up several units of the same model at once, use **Bulk apply**.

5.3 Watch-list rules

The *watch list* flags units whose recorded maintenance history shows a trend toward trouble. It applies rules to recorded findings. It does not use live equipment data.

BACK OFFICE OR ADMIN · WEB CONSOLE

Table 5-2 Watch-list rules

RULE	FLAGS A UNIT WHEN	THRESHOLD
Overdue	Maintenance has been overdue for longer than the threshold	Number of days
Drift toward a limit	A reading moves toward its acceptance limit over successive visits	Number of visits
Repeated failure	The same pass or fail item fails on consecutive visits	Number of visits

You can set thresholds per model or for the whole shop. Each flag shows the history that raised it (Figure 5-3).

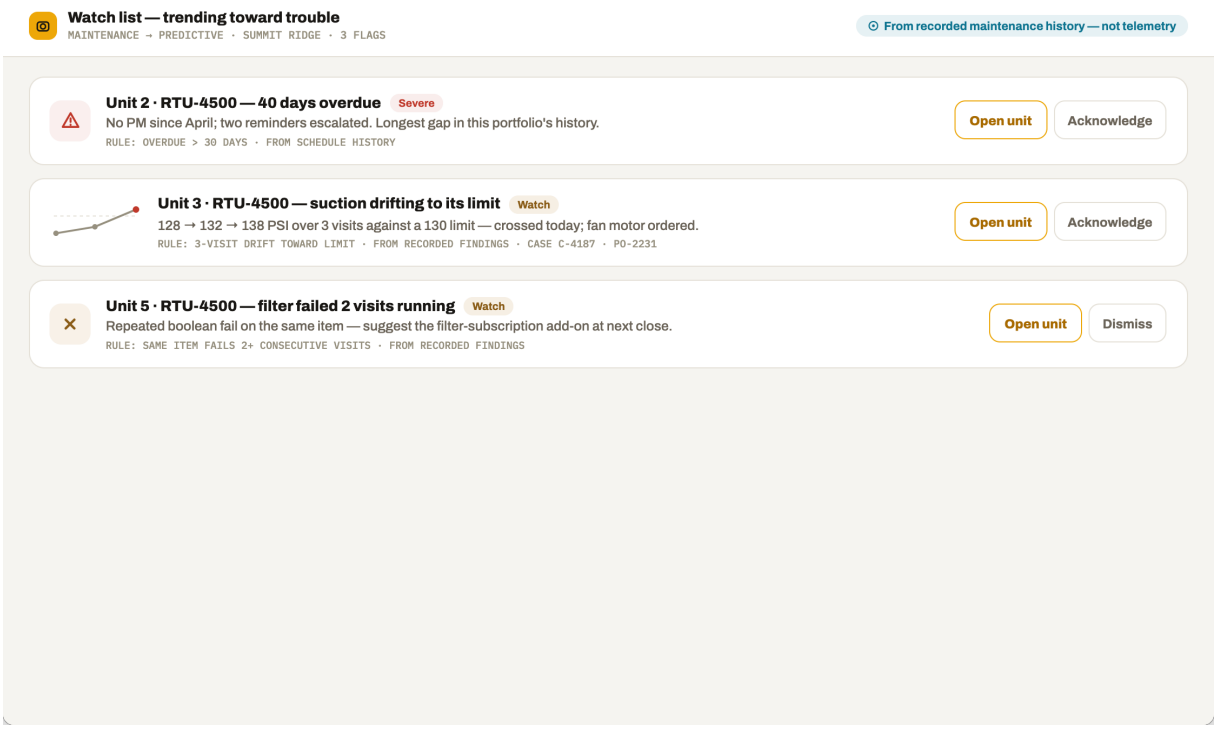


Figure 5-3 The watch list, with the rule behind each flag. Sample data.

When you acknowledge a flag, it is muted for a period.

5.4 Condition-based maintenance

For units connected to a building management system or a connected-equipment platform, Zylergy Field can raise maintenance from the unit's condition, in addition to its intervals.

ADMIN FOR CONNECTIONS, BACK OFFICE FOR MAINTENANCE SETTINGS · WEB CONSOLE

1. **Connect the source.** Zylergy provides the connector for the system that reports the units' operating data ("Connectors and the API" on page 46). An administrator enters your shop's API key for that system and maps each data stream to its unit. Readings missed while a connection is interrupted are filled in when it returns.
2. **Normal range.** Zylergy Field learns each unit's normal operating range from its model and refines it from the unit's own history. Departures from the range are flagged as anomalies and scored by severity. A sustained condition raises one flag, not one flag per reading.
3. **Sensitivity.** You can set anomaly sensitivity per model or per customer.
4. **Failure estimates.** For a connected unit, Zylergy Field estimates the risk of failure and the remaining useful life. It shows the signals behind each estimate and the version of the model that produced it.

5. **Condition-triggered work.** An anomaly or an estimate can raise a maintenance action for the unit. Interval schedules continue. Condition-based work is added to them and never removes them.
6. **Condition-aware checklists.** Items or limits can be added or adjusted for the unit's current condition. The items derived from the manual are never dropped.
7. **Recorded with the work.** The maintenance event records the condition or estimate that triggered it.

Only your shop and the customer can see condition data, anomalies and estimates, within their entitlements. Each access is recorded. Zylergy Field recommends the work. It does not send quotes or dispatch technicians automatically.

5.5 Problems with maintenance setup

Table 5-3 Problems with maintenance setup

WHAT YOU SEE	WHY	WHAT TO DO
A unit has no schedule	Its model has no published template, or the unit has no in-service date.	Publish the template. Check the unit's details.
Technicians see an old checklist	The new version has not been published, or the device has not synced.	Publish the new version. Ask the technician to connect.
A template is not available to your shop	It is derived from a licensed manual your shop is not entitled to.	Apply for the entitlement.
Too many watch-list flags	The thresholds are too sensitive for the model.	Adjust the thresholds for the model.
Condition-triggered work appears for a unit with no problem	Anomaly sensitivity is too high, or the unit's normal range is still being learned.	Adjust the sensitivity for the model or customer. Acknowledge the flag.
Reminders do not reach the customer	**Owner digest** is off for the site.	Turn it on under **Reminders**.

6

CHAPTER 6

Service-plan catalog

IN THIS CHAPTER

- How the catalog is organized 36
- Publishing and versions 36
- Sales signals and leads 36
- Problems with service plans 37

The service-plan catalog holds the maintenance agreements your shop offers its customers. Technicians present the plans from the catalog at the end of a visit, so all technicians offer the same options. The shop owner builds and publishes the plans. For the procedure, see the *Zylergy Field Operator Guide* (ZY-FLD-OPG-01), chapter “Running the shop.”

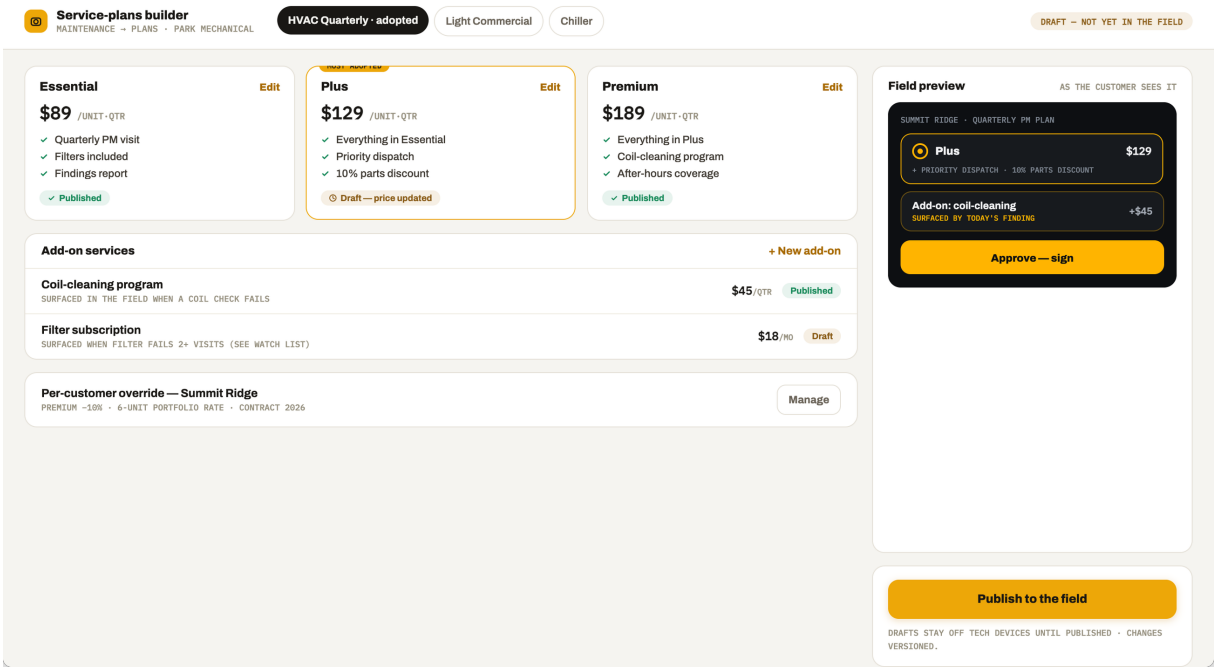


Figure 6-1 The service-plans builder. Sample data.

6.1 How the catalog is organized

BACK OFFICE · WEB CONSOLE

Table 6-1 Parts of the service-plan catalog

PART	WHAT IT IS
Segment	A catalog for a kind of customer or equipment, such as light commercial or chillers. Each segment has its own tab.
Tier	A plan level with its coverage, terms and price per unit and period. Each tier is **Published** or a draft.
Add-on service	An extra service with its own price, and the finding that triggers it in the field, such as a failed coil check or a filter that fails on repeated visits.
Per-customer override	Different terms for one customer, such as a portfolio rate.
Field preview	The offer as the customer sees it on the technician's device.

You can start from a template and adjust it. You can also describe an offer in plain words, and Zylergy Field drafts the tiers, coverage, terms and pricing. The draft can take into account the opportunities Zylergy Field finds in your customers' units. Review and adjust the draft before you publish it.

6.2 Publishing and versions

- Technicians do not see drafts. To send a plan to the field, click **Publish to the field** (Figure 6-1).
- Each published change creates a new version. The next offer a technician presents uses the new version.
- Each shop builds and presents only its own catalog. Other shops cannot see it.

6.3 Sales signals and leads

BACK OFFICE · WEB CONSOLE

Zylergy Field creates replacement opportunities and leads from repeat repairs. For connected units, it also uses the estimated failure risk and the remaining useful life. You set how sensitive

the repeat-repair rule is, per equipment category and repair type. For example, the rule can flag one kind of unit after two compressor replacements within a period, and another after three.

A *lead* is created with the unit's repair history when a technician passes a suggestion on, or when an opportunity is raised. If your field-service or CRM system is connected, the lead is written there. Won leads are reported back so that the rule can be tuned. Only the shop and the customer concerned see an opportunity.

6.4 Problems with service plans

Table 6-2 Problems with service plans

WHAT YOU SEE	WHY	WHAT TO DO
Technicians present old prices	The change is still a draft.	Click **Publish to the field**.
An add-on never appears in the field	Its trigger finding does not occur, or the add-on is a draft.	Check the add-on's trigger and status.
One customer sees the standard terms	No per-customer override is set for them.	Set the override under **Per-customer override**.

7 CHAPTER 7

Purchasing setup

IN THIS CHAPTER

- Approval thresholds and approvers 38
- EPA 608 certification records 39
- Markup and negotiated pricing 39
- Sourcing strategy and policy 40
- Payment methods 40
- Tax-exempt and resale certificates 41
- Net terms 41
- Delivery and returns defaults 41
- What technicians see for each setting 42
- Problems with purchasing 42

Purchasing settings control who approves which orders, who can order refrigerant-restricted parts, how prices are marked up and sourced, and how the shop pays. They are set in the web console.

7.1 Approval thresholds and approvers

BACK OFFICE · WEB CONSOLE

Orders that match a threshold are held for approval before they are placed.

Table 7-1 Approval threshold settings

SETTING	WHAT IT DOES
Threshold	An order amount, part categories, an individual technician, a customer type, or a combination of these.

Approver	The person who approves, set per team or per technician.
Backup approver	Receives the request if the approver does not respond within four business hours.

The approver receives a notification with the order details, and approves or rejects the order with an optional comment. Approvals and rejections are recorded with the approver, the comment and the time. These records are kept indefinitely.

7.2 EPA 608 certification records

BACK OFFICE · WEB CONSOLE

Refrigerant-restricted parts are flagged in the catalogs. A technician without an EPA 608 certification on file cannot add them to a cart.

- **Certification record.** Record each technician's certification type (Universal, Type I, Type II or Type III), certificate number and expiration date.
- **Renewals.** The technician and the office receive a reminder before a certification expires.
- **Authorizing an order.** The shop owner, or a person your shop designates, can authorize a restricted order for delivery to a certified team member. The authorization is recorded with the name of the person who gave it.

7.3 Markup and negotiated pricing

BACK OFFICE · WEB CONSOLE

- **Default markup.** Your shop sets the markup applied to parts on the customer's view. Technicians see your shop's cost, and the customer sees the marked-up price. A technician can change the markup for one line or for the whole quote.
- **Negotiated pricing.** If your shop holds a negotiated price or discount with a manufacturer or distributor for original parts, enter it per brand, part class or part number, with its effective dates. Your shop's quotes then use it instead of the standard price. Each quote and order shows which price basis was applied.
- **Quote documents** carry your shop's branding.

7.4 Sourcing strategy and policy

BACK OFFICE · WEB CONSOLE

When more than one supplier can provide a part, Zylergy Field recommends one for each cart line. The technician can choose another.

- **Default strategy.** Cheapest, fastest, or your preferred supplier.
- **Sourcing policy.** If your shop is bound by a manufacturer's authorized-channel agreement, map that manufacturer or part class to the permitted supplier. For those lines, the technician does not see a comparison. The line is pinned to the permitted supplier, and the reason is shown. Negotiated pricing applies to the pinned supplier. A policy applies only to your shop and that manufacturer's terms.
- **Reason for each line.** Each order shows why a line went to its supplier, such as price, availability or policy.

Distributor accounts your shop holds can be linked to your Zylergy Field account.

7.5 Payment methods

BACK OFFICE · WEB CONSOLE

Parts orders are paid with the shop's payment methods. Technicians place orders, but they do not see, change or carry payment details.

- **Card or ACH. Card** is the default. You can also use an **ACH** bank account. You enter the details in the payment processor's secure form. Zylergy never stores card details. Saved methods show only their last four digits.
- **Primary and secondary.** You can set a primary and a secondary payment method.
- **Expired or unverified methods.** When a card expires or a bank account cannot be verified, the shop owner is asked to update it.
- **Authorization.** When an order is placed, the payment method is authorized for the total. If it is declined, the order is not sent and the technician sees a message for the office.

Receipts and invoices for parts orders are emailed to the billing contact and kept with each order. Refunds for returned parts go back to the original payment method when the supplier confirms receipt.

7.6 Tax-exempt and resale certificates

BACK OFFICE · WEB CONSOLE

Upload your shop's tax-exempt or resale certificates, with the states they cover. Zylergy reviews each certificate before exempt status is applied.

When a certificate is active, the exemption is applied to orders for the states it covers and shown on each receipt. You receive a reminder before a certificate expires. Sales tax is calculated when an order is placed, from the ship-to address or the pickup branch.

7.7 Net terms

BACK OFFICE · WEB CONSOLE

Instead of paying by card for each order, your shop can apply for net terms and pay a monthly statement.

1. **Apply.** The application asks for the legal entity, consent to a business credit check or financial statements, trade references, ownership details and the credit limit you request.
2. **Decision.** You are notified of the decision. An approved account has a credit limit and moves to monthly statements. A declined application can be reviewed again later.
3. **Monthly statement.** A statement is issued at the start of each month for the previous month's orders, with line detail. Pay by ACH, wire or check.
4. **Over the limit.** An order that would exceed the credit limit can be paid with a card kept on file.
5. **Past due.** You receive reminders, and then new orders are put on hold, as your net-terms agreement sets out.
6. **Review.** The credit limit is reviewed once a year, or when you ask.

7.8 Delivery and returns defaults

BACK OFFICE · WEB CONSOLE

- **Default delivery destination.** Branch pickup, the shop or office, the customer site, or the technician's address.
- **Return policy.** Return windows, restocking fees and return shipping follow the supplier's and your shop's return policies. Fees can be waived, for example for defective parts.
- **Return credits.** Credits go back to your shop automatically when the supplier confirms receipt. Your office then finalizes the credit for the job or customer.

7.9 What technicians see for each setting

Table 7-2 Purchasing settings in the field

SETTING	WHAT THE TECHNICIAN SEES
Approval threshold	The order is held with a pending status that names the approver. The decision arrives as a notification.
EPA 608 record missing	Adding a restricted part is blocked, with a message to ask the office.
Markup	Cost. The customer's view of the quote shows the marked-up price.
Negotiated pricing	The negotiated price, with the basis shown on the quote.
Sourcing policy	No comparison for the covered parts. The line is pinned to the permitted supplier, with the reason.
Default strategy	The recommended source is preselected on **Choose source**.
Declined payment method	The order is not sent. The technician sees a message for the office.
Default delivery	The default destination is preselected on **Ship it where?**.

7.10 Problems with purchasing

Table 7-3 Problems with purchasing

WHAT YOU SEE	WHY	WHAT TO DO
Orders wait for approval longer than expected	The approver is not responding.	Check the approver and the backup approver.
Every order needs approval	A threshold is set too low or applies to everyone.	Review the thresholds.
A certified technician is blocked from a refrigerant part	Their EPA 608 record is missing or expired.	Record or renew the certification.
Orders are declined at payment	The payment method has expired or cannot be authorized.	Update the payment method.
Tax is charged on exempt orders	The certificate is not yet approved, or does not cover the state.	Check the certificate's status and states.

The comparison of sources is missing	A sourcing policy pins those parts.	No action is needed. If the policy is wrong, review it.

8

CHAPTER 8

Integrations and API

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- Sign-in 44
- Parts suppliers 45
- System-of-record integrations 45
- Connectors and the API 46
- Condition data sources 46
- Notifications and email 46
- Before you connect a system 47
- Problems with integrations 47

Zylergy Field connects to the systems your shop already runs, so that customers, sites, units, jobs and records match in both systems. Zylergy provides each connector. You connect it in the web console with your shop's own API keys or credentials, and Zylergy's engineers help during onboarding. You pay for the vendors' APIs, either through your subscription or directly to the vendor.

8.1 Sign-in

ADMIN · WEB CONSOLE

People sign in with their work email. A shop can send its people to its own single sign-on page. Single sign-on works with identity providers that use SAML 2.0 or OpenID Connect. Otherwise, the app asks for a 6-digit code. After the first sign-in, the app offers Face ID on the device.

8.2 Parts suppliers

Parts catalogs, prices, stock, ordering, order status, branch pickup and return acknowledgments come from the parts suppliers connected to Zylergy Field. Your shop does not set up these connections.

8.3 System-of-record integrations

ADMIN · WEB CONSOLE

Zylergy Field reads from and writes to your field-service software. Zylergy Field connects to ServiceTitan, BuildOps and Housecall Pro. Connect the one you use with your shop's own credentials.

Table 8-1 What a system-of-record integration exchanges

DIRECTION	DATA
Read from your system	Dispatch lists and each technician's jobs for the day. Equipment inventories per customer and site. Customer addresses, contacts and service agreements. Job number, customer reference and billing reference.
Write to your system	Parts ordered, with prices, the customer's markup and the supplier reference. Customer approvals with the PDF. Service recommendations and field notes. Sales leads. Equipment service history updates.

When an integration is on:

- The technician's route comes from your system's dispatch list, and the day's offline pack follows it.
- The equipment structure is read from your system. Edits in Zylergy Field are written back where your system allows it.
- The job number and customer come across to the cart, so technicians do not retype them.

The connection uses your system's own authorization where that system supports it. Each system has its own rules for resolving conflicts between the two systems.

8.4 Connectors and the API

ADMIN · WEB CONSOLE

A *connector* exchanges customer, site, equipment and record data with another contractor platform or with a field-service or asset-management system. Zylergy Field connects to the contractor platforms BuildOps and Procore. Connect each one with your shop's own credentials.

- **What is exchanged.** Customers, sites, the equipment list, and maintenance and repair records, in both directions, with conflict and merge handling.
- **The API.** Your developers can use the documented Zylergy Field API to read and write the same client data.
- **Entitlements still apply.** Synced data follows the isolation and entitlement rules of the rest of the product. It does not override manufacturer content restrictions.
- **No automatic dispatch.** Connectors move data. They do not send quotes or dispatch work.

Condition data, failure estimates and analytics are kept in Zylergy Field.

8.5 Condition data sources

ADMIN · WEB CONSOLE

Building management systems and connected-equipment platforms can send units' operating data to Zylergy Field through connectors. Zylergy Field converts the data from each source to a common form. The data is keyed to the unit by make, model and serial number at its site. Detection and estimates then work the same way for every source.

To connect a source, enter your shop's API key for that system in the connector Zylergy provides. Then map each data stream to its unit, when the unit is added or later. Each reading can be traced to a unit, a site and a source.

8.6 Notifications and email

Zylergy Field sends push notifications to the app and email from the console. Push notifications follow each person's settings in the app. Email follows **My settings** in the console.

8.7 Before you connect a system

- Decide which system holds the master records for customers, sites and equipment. Clean up duplicates there first.
- Decide whether technicians' routes should come from your system's dispatch list.
- Check who in your shop can authorize the connection in the other system.
- Plan what happens to records already entered by hand in Zylergy Field.

8.8 Problems with integrations

Table 8-2 Problems with integrations

WHAT YOU SEE	WHY	WHAT TO DO
Technicians' routes are empty	The dispatch list has not come across, or the technician has no jobs in your system.	Check the status of the integration and the jobs in your system.
A record differs between the two systems	A change in one system has not reached the other, or both changed.	Check which change is current. Apply the conflict rules for your system.
Condition data stops for a unit	The source connection is interrupted.	Check the connector. Readings are filled in when the connection returns.
Single sign-on fails for everyone	The identity provider settings changed.	Check the single sign-on settings.

9 CHAPTER 9

Data, privacy and security

IN THIS CHAPTER

- Your shop's data is separate 48
- Protection and access 49
- Records that cannot be changed 49
- Data on technicians' devices 49
- Photos and learning 50
- Customer approval records 50
- Retention 51

9.1 Your shop's data is separate

- **Isolation.** No shop can read another shop's units, customers, users, history, schedules, orders, prices or entitlements. Each shop's data is isolated, and the isolation is tested.
- **Shared documents only through entitlements.** Manufacturer documents in the curated library are shared across shops only through entitlements. Your shop's own documents stay private unless your shop shares them.
- **Shared sites only by approval.** A site serviced by several contractors is attached to each of them only after the customer or the creating contractor approves (Chapter 2). Each contractor sees only its own entitled part of the record.
- **Customers see only their own sites.** In the customer portal, a customer sees only their own sites and units, across the contractors that service them.
- **One set of access rules.** Roles and entitlements apply to documents, checklists, orders, maintenance and condition data alike.

9.2 Protection and access

- **Encryption.** Data is encrypted in transit and at rest.
- **Entitlement on every read.** Zylergy Field checks access to licensed content each time a document, schematic or derived checklist is opened in the app or the console, or used by the assistant.
- **Authentication.** Users sign in with their work email, through single sign-on or a one-time code. The app offers Face ID on the device.
- **Payment details.** Card and bank details are entered in the payment processor's secure form. Zylergy never stores them. Saved methods show only their last four digits.
- **Zylergy staff access.** Zylergy staff have their own accounts with multi-factor authentication. They see only the shops they are assigned to, and they do not appear in your shop's list of people. See Chapter 12.

9.3 Records that cannot be changed

The service log is *append-only*. Entries can be added but not edited or deleted. A correction is written as a new entry linked to the original, and both stay visible.

The maintenance record is also tamper-evident. Each maintenance event and schedule change is recorded with who made it and when. The record is protected so that a change after the fact can be detected. A building owner report or compliance report can therefore serve as evidence of what maintenance was done, when, by whom and with what result.

9.4 Data on technicians' devices

Table 9-1 What is stored on the device

DATA	STORED	CLEARED
The day's units: records, site structure, parts catalogs and frequently ordered parts	Overnight over Wi-Fi, automatically	When no longer needed
Manuals and schematics for packed units	When the technician packs	With the unit's job data
Active jobs	While the job is open	Never automatically
Closed jobs	After the job closes	Automatically 30 days after the job closes, or earlier by the technician
My regular appliances	Kept packed by the technician	Only by the technician

Work recorded offline: findings, log entries, orders, contributions	Until it is sent	When sent. Queued orders that are not sent expire after 7 days.

Nameplates are read on the device. Part photos are matched on the device for packed catalogs. Signing in needs a connection. Work already on the device opens read-only until the technician signs in. Zylergy support can rebuild a technician's offline pack (Chapter 12).

9.5 Photos and learning

Photos that technicians take and confirmed repair outcomes are used to fine-tune Zylergy's vision models. Your shop's customer agreement with Zylergy sets the terms for how your shop's data is used.

- **Capture photos.** Nameplate and part photos that technicians take help improve recognition. The setting **Help our vision models to become better at detecting parts** is on by default and applies to your whole shop. Only the **Admin** role can change it in the app's settings. Zylergy recommends leaving it on. Technicians do not see the setting. Images are screened to exclude faces, addresses and documents.
- **Part photos.** Confirmed part photos, and photos of wrong parts returned, are used to improve part matching. Customer names, addresses and job details are not stored with training images.
- **Repair outcomes.** When a repair is saved with whether the fix worked, the assistant uses it to weigh causes for that model.
- **Field reports.** Each field report carries the contributor's consent and rights, and is reviewed before it is used.

Each recommendation influenced by learned patterns, and each failure estimate, can be traced to the version of the model that produced it.

9.6 Customer approval records

When a customer approves an order on a technician's device, Zylergy Field records the approval with the customer's details, the time, and the device's location and network address. A copy is emailed to the customer. The record is kept with the order.

9.7 Retention

Table 9-2 How long data is kept

DATA	KEPT
Order history	While your shop's subscription is active
Approval and rejection records	While your shop's subscription is active
Queued orders not yet sent	7 days, then they expire
Closed-job data on devices	30 days after the job closes
Service log, maintenance history and audit records	While your shop's subscription is active

Your shop's data is kept while its subscription is active. For your data when your shop leaves Zylergy Field, see "Export" on page 53.

10 CHAPTER 10

Audit and export

IN THIS CHAPTER

- What is recorded 52
- Export 53

Zylergy Field records who did what and when for actions that affect your shop, your customers and the manufacturers whose documents you use.

10.1 What is recorded

Table 10-1 What Zylergy Field records

ACTION	WHAT IS RECORDED
Role changes and entitlement changes	Who changed what for whom, and when
Order approvals and rejections	Approver, decision, comment, time
EPA 608 overrides	Who authorized the order
Document review decisions	Reviewer, decision, entitlement assigned, time
Access to licensed documents	Shop, entitlement, time
Maintenance events	Checklist version, each finding, notes, photos, technician, time
Schedule changes	Change, reason, person, time
Requests to attach to a site	Requester, approver, decision, time
Order-line reassignments	Source, target, quantity, person, time
Return status changes	Each step, with time and actor
Zylergy support actions in your shop	Marked as performed by Zylergy support (Chapter 12)

Access to the audit trail and reports	Who opened them

Access to audit records and reports follows roles. Each access is also recorded.

10.2 Export

BACK OFFICE OR ADMIN · WEB CONSOLE

- **CSV.** You can export views in the console to CSV, such as order history, spend reports and the returns view.
- **Building owner and compliance reports.** A report covers a unit, a group or a customer over a date range. It shows maintenance performed, findings, out-of-spec items and their resolution, and maintenance missed or deferred. You can export a report as PDF or CSV. Customers can get their own reports in the customer portal.
- **Documents.** Signed approvals, receipts and invoices are available as PDF from each order.

When your shop leaves Zylergy Field, you can take a full export of your shop's data. Zylergy then deletes its copies and confirms the deletion in writing.

Produce a building owner or compliance report

BACK OFFICE · WEB CONSOLE

1. Open the reports area of the web console.
2. Choose a unit, a group of units or a customer.
3. Choose the date range.
4. Produce the report.
5. Export the report, or send it to the customer.

RESULT

The report shows the maintenance performed, the findings, the out-of-spec items and their resolution, and any maintenance missed or deferred, from the append-only record. Producing the report is recorded.

11

CHAPTER 11

Billing and subscription

ADMIN OR BACK OFFICE · WEB CONSOLE

Organization & access shows the number of seats your shop uses under **People**, and the shop's **Billing contact**. The billing contact receives receipts and invoices for parts orders. With net terms, the billing contact also receives the monthly statement (Chapter 7).

Parts orders are billed separately from the subscription, as described in Chapter 7.

12 CHAPTER 12

Zylergy support access

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- How support access works 55
- What support can do 56

To help you, Zylergy support can see your shop's console as your administrator sees it. This view is read-only. To make changes on your behalf, support needs your consent. Support actions are recorded.

Contact Zylergy support in the app under **Menu** > **Help**, or by email at support@zylergy.com. Support is available Monday through Friday, 8 a.m. to 6 p.m. US Central time.

12.1 How support access works

Table 12-1 Support access

MODE	WHAT SUPPORT CAN DO	WHEN
View as	See your shop's console read-only, as your administrator sees it. Export is turned off.	When a support person assigned to your shop opens it
Act as	Make changes in your shop on your behalf	Only with your administrator's consent, given in the product or by a ticket reference. Sensitive changes also need the approval of a support lead. The session ends automatically after a set time.

- Support staff can open only the shops they are assigned to.

- Each change support makes appears in your shop's history, marked as performed by Zylergy support.
- Each support action, including viewing, is recorded in Zylergy's own append-only record.

12.2 What support can do

Table 12-2 Support actions

ACTION
View your account read-only. Export is turned off.
Resend an invitation
Unlock a user
Reset multi-factor sign-in, where your users have it
Change a user's role
Re-run a failed import
Rebuild the data stored on a user's device for offline use
Refresh a supplier connection
Send notifications again
Apply a verified manufacturer grant while the manufacturer's own confirmation completes

Support needs your consent to change a user's role. A read-only view of your account does not need your consent.

Each action records the case it belongs to. Each action that touches your shop's data appears in your shop's history.

If the assistant or checklist derivation is turned off for a time, the assistant reports that it is temporarily unavailable, and the manuals stored on the device stay open. Checklist templates can then be entered by hand.

A

APPENDIX A

Roles reference

Table A-1 lists what each role does in Zylergy Field. The **Customer** role is for your customers: building owners, property managers and facility managers who use the customer portal. They stay outside your shop's staff.

A person can hold more than one role and can then do what each of them allows. A shop owner who is also the administrator, for example, holds **Back office** and **Admin**. The administrator invites people and assigns their roles ("Invite someone" on page 14).

Table A-1 What each role does

ROLE	WORKS IN	WHAT THEY DO
Admin	The web console	Invites people and assigns their roles. Gives technicians the entitlements the shop holds. Maintains the shop record, the shared terminal and customer portal access. Sets up integrations, connectors, condition data sources and the API. Gives consent for Zylergy support to act for the shop. Reviews and publishes documents uploaded to the shop's library, and sets document access rules. Reviews and publishes checklist templates. Contributes manuals. Reads units, visit records and the service log.

Back office	The web console	Schedules, defers, skips and overrides maintenance, and sees the maintenance dashboard for the whole shop. Works the watch list and sets its rules. Builds and publishes service plans and sets lead thresholds. Uses the shop owner's dashboard and leads. Produces building owner and compliance reports. Sets approval thresholds and approvers, and approves orders above the thresholds. Manages payment methods, net terms and tax certificates. Records EPA 608 certifications and authorizes restricted orders. Reports returns, reorders, prints return labels, applies return credits and reassigns order lines. Uses the order book, spend reports and CSV exports. Approves requests to attach to a site the shop created. Contributes manuals. Reads units, visit records and the service log.
Field tech	The app, and **Your items** in the web console	Uses the app to scan, open the unit chart, diagnose, repair, run maintenance and log the work. Places parts orders and captures the customer's approval. Approves orders above thresholds when set as an approver. Reports returns, reorders and prints return labels from **Your items**. Reassigns their own order lines and sees their own orders in the order book. Sees their assigned work on the maintenance dashboard. Presents service plans in the field. Contributes manuals. Reads units, visit records and the service log.
Customer	The customer portal, and the technician's device	Approves orders on the technician's device. Approves service plans. In the customer portal, sees their own units, the maintenance status of those units and their own reports, read-only, and approves requests to attach to their own sites.

B

APPENDIX B

Settings reference

IN THIS CHAPTER

- Personal settings in the app 59
- Personal settings in the web console 61
- Shop settings 62

Settings are in three places: the app, **My settings** in the web console, and the shop settings in the web console.

B.1 Personal settings in the app

In the app, personal settings are under **Menu** > **Account, shop & role** (Figure B-1). They affect only the person who sets them.

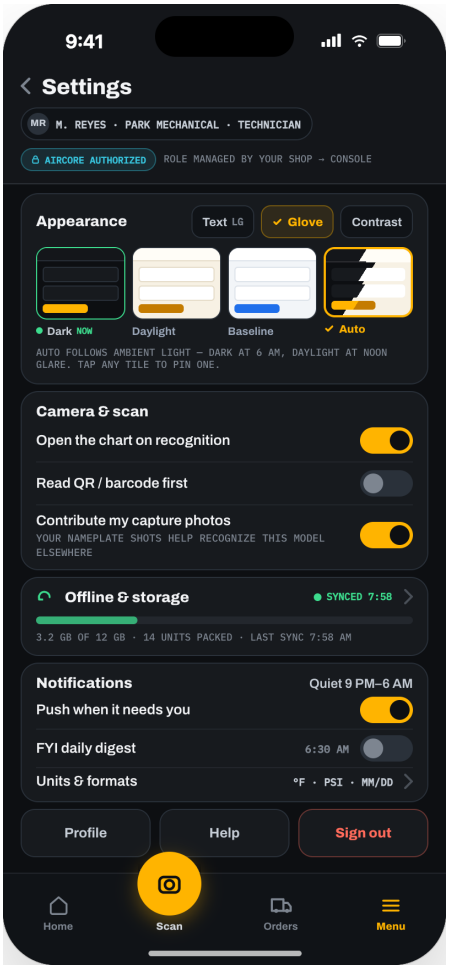


Figure B-1 Settings in the app. Sample data.

Table B-1 Personal settings in the app

GROUP	SETTING	VALUES
Appearance	**Text LG**, **Glove**, **Contrast**	On or off
Appearance	Color scheme	**Dark**, **Daylight**, **Baseline**, **Auto** (follows ambient light)
Camera & scan	**Read QR / barcode first**	On or off
Offline & storage	Offline storage	Opens storage management
Notifications	Quiet hours	A start and end time
Notifications	**Push when it needs you**	On or off
Notifications	**FYI daily digest**	On or off, with a time
Units & formats	Temperature, pressure, date	°F, PSI, MM/DD

B.2 Personal settings in the web console

In the web console, personal settings are under **My settings** (Figure B-2). They affect only the person who sets them.

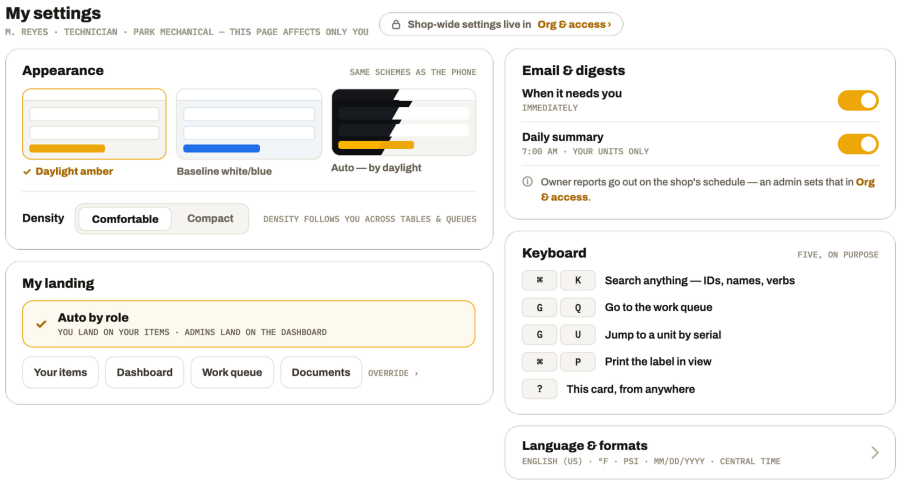


Figure B-2 My settings in the web console. Sample data.

Table B-2 Personal settings in the web console

SETTING	VALUES
Appearance	**Daylight amber**, **Baseline white/blue**, **Auto — by daylight**
Density	**Comfortable**, **Compact**
My landing	**Auto by role**, **Your items**, **Dashboard**, **Work queue**, **Documents**
Default approval view (approvers)	**Needs review**, **Everything**, your shop only
Email & digests	**When it needs you**, on or off. **Daily summary**, on or off, with a time.
Keyboard	The shortcut card (fixed)
Language & formats	English (US), °F, PSI, MM/DD/YYYY, time zone

B.3 Shop settings

Shop settings are in the web console and affect everyone in the shop. One shop setting is in the app: **Help our vision models to become better at detecting parts**, which only the **Admin** role can change (“Photos and learning” on page 50). Settings for people, entitlements, the shop record and the shared terminal are on **Organization & access**. Document settings are under **Documents**, schedules and checklist templates under **Maintenance**, and the service-plan catalog under **Service Plans**.

Table B-3 Shop settings

SETTING	ROLE	DESCRIBED IN
Users and roles	**Admin**	Chapter 3
Entitlement membership	**Admin**	Chapter 3
Tenant (shop name), **Branches**, **Billing contact**	**Admin**	Chapter 2
Shared terminal	**Admin**	Chapter 2
Customer portal access	**Admin**	Chapter 2
Customers, sites, units and groups	**Back office**	Chapter 2
Document access levels and entitlements	**Admin**. **Back office** users set the access level when they upload.	Chapter 4
Checklist templates	**Admin**	Chapter 5
Schedules, intervals and reminders	**Back office**	Chapter 5
Watch-list thresholds	**Back office**	Chapter 5
Anomaly sensitivity	**Back office**	Chapter 5
Service-plan catalog	**Back office**	Chapter 6
Lead thresholds	**Back office**	Chapter 6
Approval thresholds and approvers	**Back office**	Chapter 7
EPA 608 records	**Back office**	Chapter 7
Markup and negotiated pricing	**Back office**	Chapter 7
Sourcing strategy and policy	**Back office**	Chapter 7
Payment methods, tax certificates, net terms	**Back office**	Chapter 7
Default delivery destination	**Back office**	Chapter 7
Default label printer	**Admin**	Chapter 2

SETTING	ROLE	DESCRIBED IN
Building owner report schedule	**Back office**	Chapter 2
System-of-record integration	**Admin**	Chapter 8
Connectors, API and condition data sources	**Admin**	Chapter 8
Single sign-on	**Admin**	Chapter 8
Voice input	**Admin**	Chapter 2

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.

anomaly

A departure of a connected unit's operating data from its normal range, flagged once per sustained condition.

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.

assistant

The Zylergy Field feature that answers questions about the unit in front of you from that unit's manuals and service log only. It cites the page it used and says so when the documents do not cover a question. It needs a network connection.

back office

The people who work in the web console: planning, dispatch, quotes, customers, supervision and reports. The matching role is **Back office**. In Zylergy Field this is the shop owner and any office staff. In Zylergy Facilities it is facility managers, dispatchers and compliance staff. In Zylergy Solar it is sales and service coordination.

building management system (BMS)

An existing building system that monitors equipment and can supply condition data.

case

A repair job on one unit in Zylergy Field. A case keeps the diagnosis, repair steps and linked parts orders together, so that work can stop while parts are on order and resume later.

checklist template

A versioned maintenance checklist for one equipment model, proposed from the manufacturer's service manual and reviewed and published by an Admin. Technicians run checklists created from the published template.

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.

Company Brain

Your organization's governed knowledge in Zylergy: the manuals, records, notes and photos the product draws on, with access set by your administrator. Each product presents it where you work: the document library in Zylergy Field, the asset brain in Zylergy Facilities, and the manuals and history on the asset record in Zylergy Solar.

condition data

Operating data that a connected unit or an existing building system reports, used to flag anomalies, estimate failure risk and raise condition-based work.

confidence

How strongly the evidence supports an answer or a match, shown in words (for example **High confidence**) together with the sources it aligns with.

connected unit

A unit whose building management or connected-equipment system sends condition data to Zylergy Field.

connector

A connection, set up by Zylergy's engineers, that exchanges data between Zylergy Field and another business system, such as a contractor platform.

console home

The web console's **Dashboard** page: task strip, attention tiles, activity and Your items.

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.

customer portal

Read-only pages in Zylergy Field where your customers see their units, visit records and items waiting for their approval. Your shop administers it. The console section is labeled **Owner Portal**.

customer sign-off

The customer's approval of a quote or order: on the technician's device in Zylergy Field, electronically from a link or PDF in Zylergy Solar. A copy goes to the customer.

document library

The Zylergy Field part of the Company Brain: manufacturer and shop documents, each with an access level, shown as **Manuals & documents** in the app and **Documents** in the web console.

entitlement

Permission to read a manufacturer's licensed documents, held by a shop, for example as an authorized dealer, and assigned to people in the shop as entitlement roles by the administrator. Zylergy Field checks entitlements each time a document is opened or used by the assistant.

EPA 608

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

equipment context

The Zylergy Field view that lists a unit's documents, schematics and service history before you ask the assistant a question about it.

estimated failure risk

The estimate, for a connected unit, of how likely a component is to fail, shown with the signals behind it.

field report

Knowledge a technician captures at the point of repair, reviewed before others or the assistant can use it.

finding

A result recorded for one checklist item: pass, fail, not applicable, or a measured reading with its verdict.

lead

A replacement or service opportunity created from repeat repairs or a unit's condition, with the unit's repair history.

nameplate

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

offline

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

offline pack

The documents, catalogs, checklists and jobs that the app stores on your device for the day's work so they work without a signal.

order book

The console list of every open order line in the shop.

quote

The priced offer for a repair, with parts and labor, that the customer approves before work or parts are ordered.

reading

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

remaining useful life

An estimate, derived from operating data and failure history, of how long a component can keep operating before it is expected to fail.

request to attach

A request from a contractor to be attached to a site or unit record already held by a building owner or another contractor. It takes effect only when approved.

return

Sending a part back to the supplier from a completed order, recorded in Zylergy Field with a reason and a return method. A return has an RMA number.

RMA

Return merchandise authorization: the number that identifies a return.

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.

service log

The append-only history of a unit or site: repairs, diagnoses, maintenance visits, orders and returns, in one timeline.

service plan

A maintenance agreement your company offers its customers, built from tiers and add-ons in the web console and presented the same way by every technician.

shared terminal

A desk computer set up for fast user switching with tiles and a 4-digit PIN.

shop

Your contracting company as it is set up in Zylergy Field, including its people, branches and entitlements.

shop owner

The owner or principal of the contracting business. The shop owner works in the web console with the **Back office** role and often also holds **Admin**. Shop owner and administrator are separate jobs, even when one person does both.

sync

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

technician

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

unit

One piece of HVAC equipment at a customer site, such as a rooftop unit, identified in Zylergy Field by its nameplate.

unit chart

The Zylergy Field screen for one unit: identity, maintenance status, open work, documents, service log, and the actions **Find a part**, **Diagnose a fault** and **Run maintenance**. In the web console the same information is on the unit page.

unit page

The web console view of one unit; the same record as the unit chart.

visit

One scheduled trip by a technician to a site.

watch list

Units whose recorded maintenance history shows a trend toward trouble, such as a reading drifting toward its limit over several visits or the same item failing repeatedly. It is based on recorded findings, not on live equipment data.

web console

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

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.

Your items

The Zylergy Field list of desk tasks sent ahead from your phone, such as a return label to print, shown at the top of the web console.

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