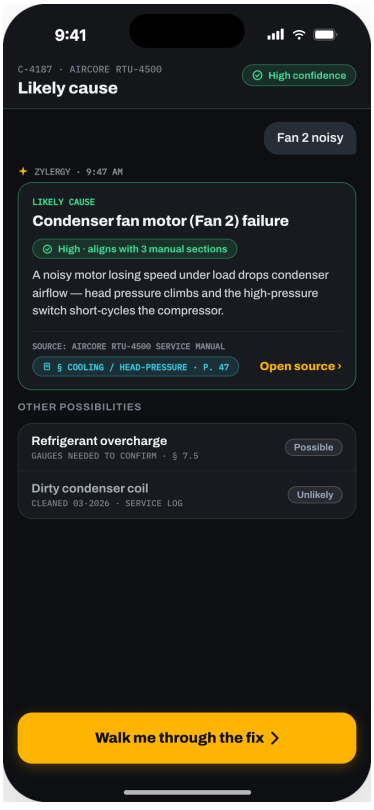
ZYLERGY

OPERATOR GUIDE

Zylergy Field

Operator Guide

For HVAC technicians and back-office staff using Zylergy Field on iPhone, iPad and the web console



SAMPLE DATA.

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 HVAC service technicians who use the Zylergy Field app on iPhone or iPad. It is also for the back office of a service shop (the shop owner and office staff), who work in the web console. Field work comes first: identifying units, diagnosing, repairing, ordering parts, running maintenance and presenting service plans. The back-office chapters follow, then the customer portal, a screen reference and troubleshooting. The guide assumes you know how to service HVAC equipment and how your shop runs its work. If you are new to Zylergy Field, start with the *Zylergy Field Quick Start Guide*. Administrators who set up the shop should use the *Zylergy Field Admin Guide*.

How this guide is organized

- Chapter 1, “Safety information,” gives the safety messages that apply when you use Zylergy Field at a job site.
- Chapter 2, “Getting to know Zylergy Field,” covers the app, the web console, the customer portal, navigation, search, notifications, offline work, personal settings and voice input.
- Chapters 3 to 11 cover field work: identifying units, diagnosing a fault, repairing a unit, finding and ordering parts, orders and returns, running maintenance, service plans, working offline and working on iPad.
- Chapter 12, “Back-office work in the web console,” covers the console that office staff and technicians use. Chapter 13, “Running the shop,” covers the shop owner’s dashboard, supervision and approvals. Chapter 14, “The customer portal,” shows what your customers see.
- Chapter 15, “Screen reference,” describes the screens shown in this guide. Chapter 16, “Troubleshooting,” lists symptoms, causes and remedies.
- 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 (this guide)	ZY-FLD-OPG-01	Everyday work in the app and the web console, and a reference for every screen
Zylergy Field Admin 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-OPG-01`), the revision (A) and the page number.

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1

CHAPTER 1

Safety information

IN THIS CHAPTER

- General safety messages 1
- Content in the app and in this guide 2

Read this chapter before you use Zylergy Field at a job site. The safety messages in this chapter apply to all tasks in this guide. A message that applies to a whole procedure appears under the procedure title. A message that applies to one step appears in the procedure, immediately before that step.

> NOTE
> Zylergy Field 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 Content in the app and in this guide

When the app's assistant gives repair steps, it carries over the cautions the manufacturer's manual gives for those steps. Treat them as you would treat the caution in the printed manual. If the app shows no caution for a task, a caution may still apply. Check the manufacturer's documentation.

If the documents available to you do not cover a question, the assistant says so instead of guessing. Do not treat an answer without a citation as manufacturer guidance. Use the manufacturer's documentation or ask your office.

Checklists are drafted from the manufacturer's service manual. Your shop or Zylergy reviews and approves each checklist before it is used. If an acceptance range or a step on a checklist differs from the manufacturer's current documentation, follow the documentation and report the difference to your office.

Voice commands, video walkthroughs and overlays on the camera view let you follow the guidance with fewer touches. They do not change the guidance, and they do not make it safe to look at a screen while you work on energized or moving 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

Getting to know Zylergy Field

IN THIS CHAPTER

- Who uses Zylergy Field 5
- The parts of Zylergy Field 6
- Sign in to the app 7
- The Home screen 8
- Navigation: the bottom bar and the Menu 9
- Search 11
- Notifications 12
- Working without a signal 13
- Personal settings 14
- Voice input 16

Zylergy Field puts the documents, parts information and service history for each HVAC unit on the technician's iPhone or iPad. The back office uses the web console to supply manuals, plan and supervise the work, and handle orders, returns and credits.

2.1 Who uses Zylergy Field

Your administrator gives each person in your shop one or more roles: **Admin**, **Back office** or **Field tech**. Your customers hold the fourth role, **Customer**, in the customer portal. Your role decides what you can see and do in Zylergy Field. In a small shop one person often does several jobs. The shop owner, for example, often holds **Admin** as well as **Back office**. Shop owner and administrator are still two separate jobs.

Table 2-1 People and roles in Zylergy Field

PERSON	ROLE	WORKS IN	MAIN WORK
Technician	**Field tech**	The app on iPhone or iPad, and Your items in the web console	Identifies units, diagnoses and repairs, orders and returns parts, runs maintenance checklists, presents service plans
Shop owner	**Back office**, often also **Admin**	The web console	The principal of the contracting business. Supervises the work, reads the shop owner's dashboard, approves quotes and orders, plans visits and maintenance, adds manuals to the library, builds service plans, and watches orders and spend.
Office staff	**Back office**	The web console	Takes on parts of the shop owner's work, such as orders, returns, return labels and credits.
Administrator	**Admin**	The web console	Manages users and roles, entitlements, shop settings, integrations, security and support access. Reviews manuals uploaded to the shop's library.

Customer at the unit	No role needed	The technician's device	Reviews and approves quotes, orders and service plans
Building owner, property manager or facility manager	**Customer**, outside your shop's staff	The customer portal (read-only)	Sees their units, visit records and reports, and approves what is waiting for them

When a task can belong to the shop owner or to office staff, this guide says "your office".

2.2 The parts of Zylergy Field

Table 2-2 Where each part of Zylergy Field runs

PART	RUNS ON	USED FOR	COVERED IN
The Zylergy Field app	iPhone and iPad with iOS or iPadOS 26 or later, from the App Store	Field work at the unit. Most of it works offline.	Chapter 3 to Chapter 11
The web console	A current version of Google Chrome, Microsoft Edge, Safari or Firefox. Your administrator gives you the console address.	Back-office work: documents, maintenance, orders, returns, credits, service plans, people and settings	Chapter 12 and the *Zylergy Field Admin Guide*
The customer portal	A web browser	Read-only pages where your customers, such as building owners, see their units and visit records and approve what is waiting for them. Your shop administers the portal. In the web console its section is labeled **Owner Portal**.	Chapter 14

The iPhone and iPad versions are the same app. On iPad, the larger display shows your work and the material you need side by side (Chapter 11).

2.3 Sign in to the app

The sign-in screen asks for your work email (Figure 2-1). What happens next depends on how your shop set up sign-in. For more on your first sign-in, see the *Zylergy Field Quick Start Guide*.

TECHNICIAN · IPHONE OR IPAD · NEEDS A SIGNAL

BEFORE YOU BEGIN

- The Zylergy Field app is installed.
- Your shop 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 Field app.
2. In **Work email**, enter your work email address.
3. Tap **Continue**.
4. If your shop 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.

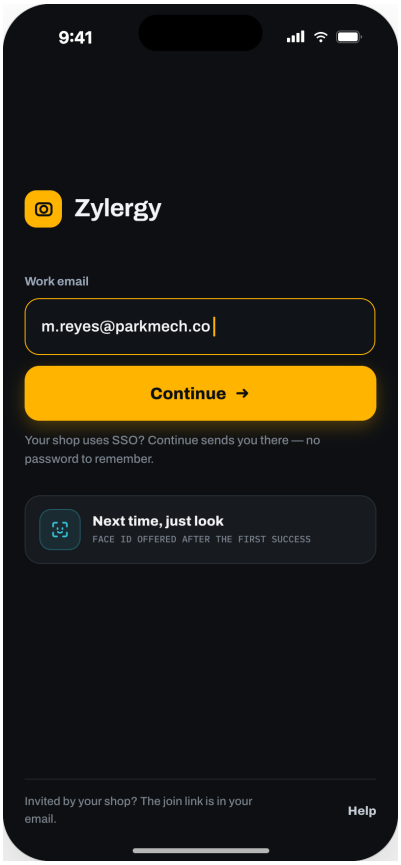


Figure 2-1 The sign-in screen. Sample data.

RESULT

You are signed in. On the first sign-in, the app asks for camera access. Then the Home screen opens.

If the app shows "We don't see that address at a shop yet — check it, or ask for an invite.", check the email address you entered. If it is correct, ask your administrator to invite you. If you have no signal, the app tells you that sign-in needs a signal. Work already on the device opens read-only until you sign in.

At first run, the app asks for camera access to read nameplates and parts (the *Zylergy Field Quick Start Guide* shows the screen). Tap **Enable the camera** and allow access when iOS asks. If you tap **Not now — I'll type it in**, you identify units by typing their details. You can allow camera access later in the iOS Settings app. The app asks for notification and microphone access when a feature first needs them.

2.4 The Home screen

The Home screen shows your day (Figure 2-2). It is the first tab of the bottom bar.

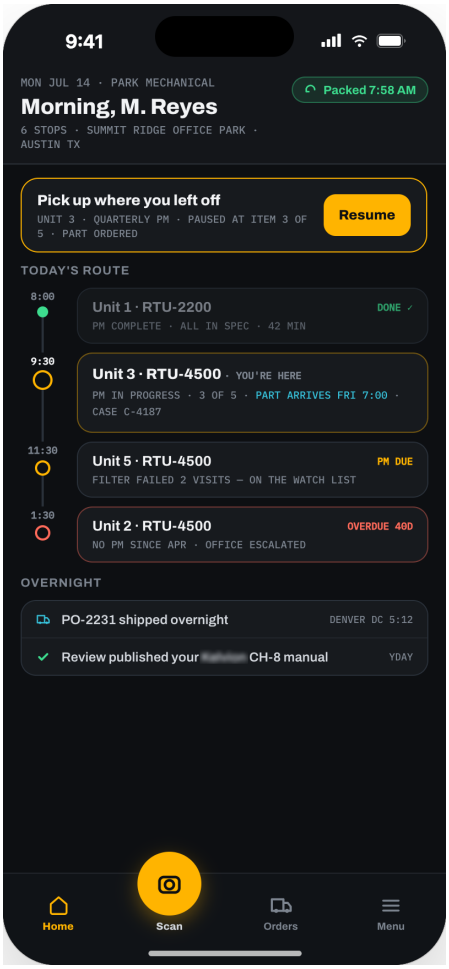


Figure 2-2 The Home screen: today's route and work to resume. Sample data.

Table 2-3 What is on the Home screen

AREA	WHAT IT SHOWS
Header	The date, your shop, the day's site, and when your offline pack was last packed (for example **Packed 7:58 AM**).
Pick up where you left off	Work you paused, such as a checklist stopped partway or a repair waiting for a part, with **Resume**.
Today's route	Your stops in order, with each unit's status: done, in progress, maintenance due, overdue, on the watch list. Tap a stop to open it.
Overnight	What changed since yesterday, such as an order that shipped or a manual that was published after review.
Bottom bar	**Home**, **Scan**, **Orders** and **Menu** ("Navigation: the bottom bar and the Menu" on page 9).

When nothing is scheduled, the Home screen offers to scan any unit. If your shop connects Zylergy Field to its field-service system, the route comes from that system's dispatch list (see the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01), chapter "Integrations and API").

2.5 Navigation: the bottom bar and the Menu

The bottom bar has four tabs. **Scan** is in the center. Tap it from any screen to identify the unit in front of you.

Table 2-4 The bottom bar

TAB	OPENS
Home	Your day ("The Home screen" on page 8).
Scan	The camera, ready to read a nameplate, a QR code or a tag (Chapter 3).
Orders	The orders board: parts arriving and returns in flight (Chapter 7).
Menu	Manuals, the service log, offline storage, notifications, your account and help (Figure 2-3).

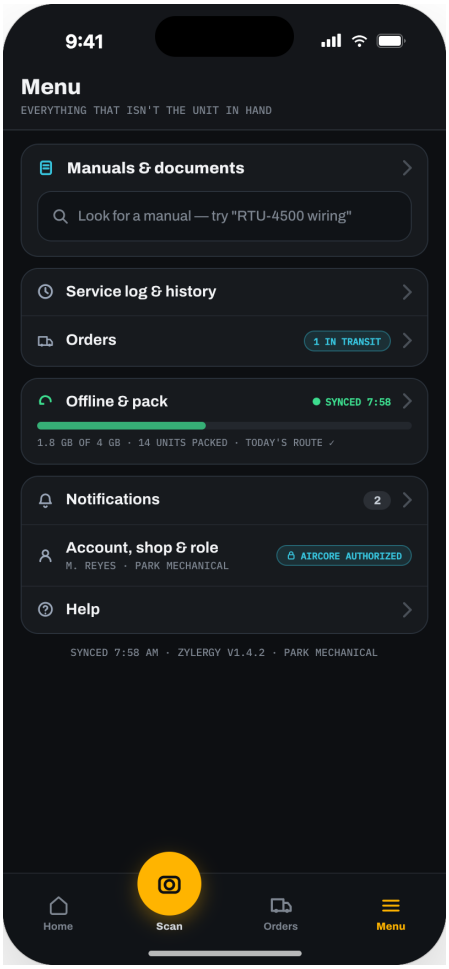


Figure 2-3 The Menu. Sample data.

Table 2-5 Menu rows

ROW	WHAT IT OPENS
Manuals & documents	The document library, with a search field. See “Read a unit’s manuals” on page 24.
Service log & history	The append-only history of the unit or of all your shop’s units (“Read the service log” on page 25).
Orders	Your orders, with a count of what is in transit.
Offline & pack	Packing and offline storage, with the time of the last sync (Chapter 10).
Notifications	What changed, with a count of what needs you (“Notifications” on page 12).
Account, shop & role	Your name, shop and entitlement roles, and your personal settings (“Personal settings” on page 14).

Help	In-app help.

The foot of the Menu shows the time of the last sync, the app version and your shop.

2.6 Search

Use search to find manuals, units, orders and repair cases (Figure 2-4). A manual opens at the page you searched for. A unit opens its chart, and an order opens its status.

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE FOR CACHED CONTENT

1. On the Home screen or the Menu, tap the search field.
2. Enter what you are looking for, such as a model and a topic, a serial number or an order number.
3. To narrow the results, tap a scope: **All**, **Manuals**, **Units**, **Orders** or **Cases**.
4. Tap a result to open it.

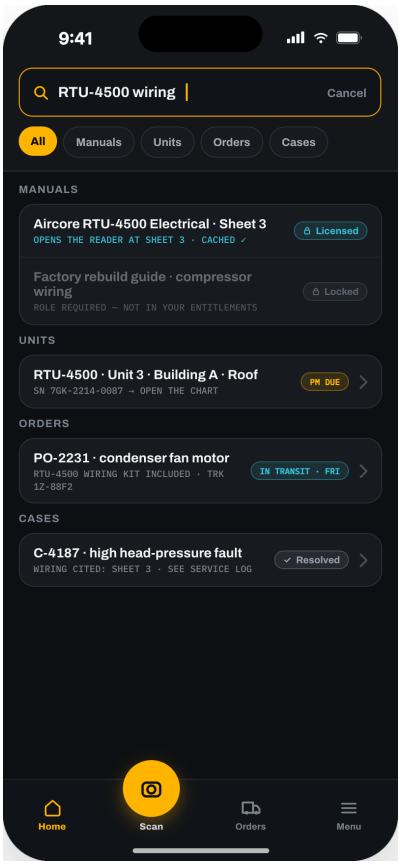


Figure 2-4 Search results grouped as manuals, units, orders and cases. Sample data.

RESULT

The manual, unit chart, order or case opens.

A document marked **Licensed** is available to you through an entitlement your shop holds. A document marked **Locked** needs an entitlement you do not have. Without a signal, search cov-

ers what is stored on the device. Results that depend on a live feed, such as order status, are marked as stale.

2.7 Notifications

The **What changed** screen lists the items that need you first, then the items that are only for your information (Figure 2-5). The badge on the bottom bar counts only the items that need you.

- **Needs you**: an order exception, a return label ready to print at the console, an approval waiting for a customer. These clear when you do the work.
- **FYI**: an order that shipped, a manual that was published, a unit added to the watch list. Swipe an item and tap **Clear** to remove it.
- When there is nothing, the screen reads “All quiet.”

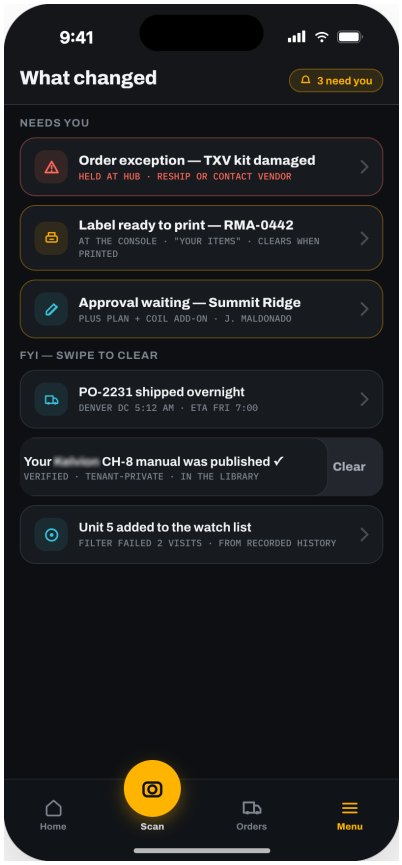


Figure 2-5 What changed: what needs you, then FYI. Sample data.

Table 2-6 Notifications Zylergy Field sends

NOTIFICATION	SENT TO	SENT WHEN
Order status	The technician who placed the order	An order is ready for pickup, in transit, or has an exception
Approval request	The approver your shop assigned	An order needs approval before it is placed (“Orders that need approval” on page 55)

Approval decision	The technician who placed the order	An approver approves or rejects the order, with any comment
Return label ready	The technician who reported the return	A prepaid label is ready to print at the console
Maintenance reminder	The assigned technician and the office	Maintenance is coming due or is overdue
Certification reminder	The technician and the office	An EPA 608 certification is about to expire
Document review	The person who submitted a manual	The manual was published, or rejected with a reason
Watch list	The assigned technician and the office	A unit is added to the watch list

Push notifications follow your personal settings for push, the daily digest and quiet hours (“Personal settings” on page 14). The list in the app keeps all notifications, including those sent while notifications were turned off.

2.8 Working without a signal

Zylergy Field keeps what you need for the day’s units on the device, in the *offline pack*. Work you record without a signal is saved on the device and synced when the connection returns. Table 2-7 lists what works offline. For packing and storage, see Chapter 10.

Table 2-7 What works without a signal

WORKS OFFLINE	NEEDS A SIGNAL
Reading a nameplate, confirming the unit, and opening the unit chart for units in your offline pack	Signing in
Manuals, schematics and parts catalogs in your offline pack	The assistant (you can still open the manuals stored on the device)
Matching a part from a photo	Live order status (the app shows the time of the last sync)
Building a cart and capturing the customer’s approval (the order is sent when you are back online and expires if it is not sent within 7 days)	Requests that go to other people right away, such as escalating a question to the office
Running a checklist and recording findings	
Saving to the service log and contributing a manual (sent when you are back online)	

2.9 Personal settings

Settings for your own device are under **Menu** > **Account, shop & role** (Figure 2-6). They affect only you. Your administrator sets your role. Your office and your administrator manage the shop's settings in the web console.

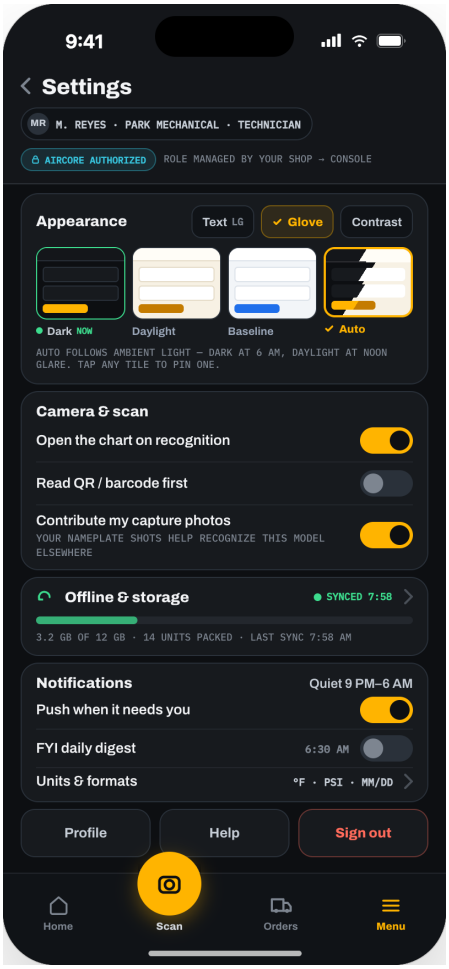


Figure 2-6 Settings in the app. Sample data.

Table 2-8 Personal settings in the app

SETTING	WHAT IT DOES
Text LG	Uses a larger text size.
Glove	Makes controls larger and easier to hit with gloves on.
Contrast	Increases contrast for glare and low light.
Dark, **Daylight**, **Baseline**, **Auto**	Color schemes. **Auto** follows the ambient light: dark early in the morning, daylight in bright sun. Tap a scheme to keep it.

Read QR / barcode first	Looks for a QR code or barcode before reading the nameplate text.
Offline & storage	Opens offline storage (“Manage offline storage” on page 83).
Notifications	Quiet hours, **Push when it needs you**, and **FYI daily digest** with its time.
Units & formats	Temperature, pressure and date formats.
Profile, **Help**, **Sign out**	Your profile, in-app help, and signing out of the app.

The header shows your name, your shop, your role, and the entitlement roles that give you access to licensed documents. It also points you to the web console for the settings your shop manages.

Change the color scheme

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE

1. Tap **Menu**.
2. Tap **Account, shop & role**.
3. Under **Appearance**, tap the scheme you want: **Dark**, **Daylight**, **Baseline** or **Auto**.
4. Optionally, turn on **Glove**, **Text LG** or **Contrast**.

RESULT

The app uses the scheme you chose until you choose another. In each scheme, status is shown by color, icon and text.

How your capture photos are used

When you scan a nameplate, the app reads the unit’s identity from the photo on the device. The setting **Help our vision models to become better at detecting parts** is on by default. While it is on, Zylergy also adds your nameplate and part photos to the images it uses to improve recognition. Customer names, addresses and job details are not stored with those images. The setting applies to your whole shop, and only your administrator can change it.

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. Administrators find the details in the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01), chapter “Data, privacy and security.”

2.10 Voice input

When your hands are busy, you can give spoken commands for common actions (Table 2-9). You can also describe a symptom to the assistant by voice (Chapter 4). The app asks for microphone access the first time you use voice input.

Table 2-9 Voice commands

COMMAND	WHAT IT DOES
Add to cart	Adds the part on the screen to the cart.
Confirm rating	Confirms the printed rating of an electrical part, such as microfarads and volts.
Mark as returned	Starts a return for the order on the screen.
Capture note	Records a spoken note on the current item or repair.
Search part	Searches the unit's parts catalog.
Request approval	Sends the current order for approval.

The app listens only when you start a command. The app answers with a tone or a short spoken response. Before a command changes an order or money, such as adding to a cart that will be charged, the app asks you to confirm with a second command or a tap. You can still use the on-screen controls.

3 CHAPTER 3

Identifying units

IN THIS CHAPTER

- Ways to identify a unit 17
- Identify a unit by its nameplate 18
- The unit chart 20
- Move around a site 24
- Read a unit's manuals 24
- Read the service log 25
- Units your shop has not set up yet 27
- Capture a manual for a unit without documents 28

Identify the unit before you start work on it. Its identity opens its manuals, parts catalog, checklists and service history.

3.1 Ways to identify a unit

Table 3-1 Ways to identify a unit

METHOD	USE IT WHEN	WORKS OFFLINE
Nameplate	The nameplate is readable. The camera reads make, model and serial number on the device.	Yes
QR / tag	The unit carries a QR code, data matrix or barcode tag.	Yes
Recents	You opened the unit recently.	Yes

Type it	The nameplate is missing, damaged or out of reach, or you already know the unit. You enter make, then model, then serial, with suggestions at each step.	Yes

Whichever method you use, you confirm the unit before its chart opens.

3.2 Identify a unit by its nameplate

The camera reads the unit's nameplate (Figure 3-1). Before the chart opens, you confirm that the app found the right unit.

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE

1. Tap **Scan**.
2. Point the camera at the unit's nameplate. When the app recognizes the unit, its make, model, serial number and location appear at the bottom of the screen.

> **⚠ 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 make, model and serial number on the screen with the nameplate.
4. If any of them does not match, do not continue: scan again, or tap **Type it** and enter the details.
5. If they match, tap **Open chart** to confirm the unit.



Figure 3-1 Scan, with the recognized unit at the bottom. Sample data.

RESULT

The unit chart opens, marked **Identified** (Figure 3-2).

If the light is poor, use the flashlight control on the camera view. If the app does not know the model, the recognition chip offers to capture it instead (“Capture a manual for a unit without documents” on page 28).

Identify a unit by its QR code or tag

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE

1. Tap **Scan**.
2. Tap **QR / tag**.
3. Point the camera at the code on the unit. The unit’s make, model, serial number and location appear at the bottom of the screen.

> **⚠ 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.

4. Compare the make, model and serial number on the screen with the nameplate.
5. If any of them does not match, do not continue: scan again, or tap **Type it** and enter the details.
6. If they match, tap **Open chart** to confirm the unit.

RESULT

The unit chart opens, marked **Identified**.

If most of your units carry tags, turn on **Read QR / barcode first** in your settings (Table 2-8).

Enter a unit’s details by hand

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE

1. Tap **Scan**.
2. Tap **Type it**.
3. Enter the make.
4. Choose the make from the suggestions.
5. Enter the model.
6. Choose the model from the suggestions.

7 Enter the serial number. The app warns you if the model or serial number range is not one it recognizes.

> **⚠ 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.

8 Compare the make, model and serial number on the screen with the nameplate.
9 If they match, tap **Open chart** to confirm the unit.

RESULT

The unit chart opens, marked **Identified**.

To return to a unit you opened earlier, tap **Recents** on the Scan screen and choose the unit. You still confirm it against the nameplate before you work on it.

3.3 The unit chart

You start each task on a unit from its *unit chart* (Figure 3-2). In the web console, this information is on the unit page (“The unit page” on page 101).

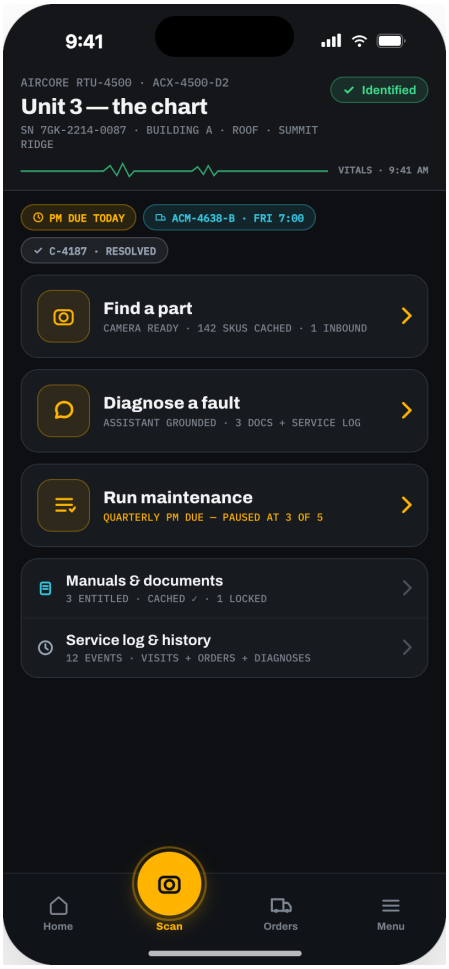


Figure 3-2 The unit chart for a rooftop unit with maintenance due today. Sample data.

Table 3-2 What is on the unit chart

AREA	WHAT IT SHOWS
Header	Make and model, unit name, serial number and location, and **Identified** once the unit is confirmed.
Status chips	What needs attention, such as **PM due today**, a part on order and its arrival, an open or resolved repair case, or **On the watch list**.
Find a part	Identify a part from a photo and order it (Chapter 6).
Diagnose a fault	Ask the assistant about a symptom, a procedure or a specification (Chapter 4).
Run maintenance	Open the checklist that is due, or resume one you paused (Chapter 8).

Manuals & documents	The documents for this unit that you are entitled to read, any that are locked to you, and whether they are stored offline (“Read a unit’s manuals” on page 24).
Service log & history	Visits, orders and diagnoses for this unit, as a timeline (“Read the service log” on page 25).

For units in your offline pack, the chart is stored on the device. Only the live order feed needs a signal, and it is marked when it is stale.

If your shop connects a unit’s building management or connected-equipment system to Zylergy Field (“Condition-based maintenance” on page 76), the chart also shows the unit’s current condition. It shows recent operating values, whether the unit is running inside its normal range, any anomaly flagged for it, and the estimated risk of failure with the signals behind it.

The equipment context view

When you tap **Diagnose a fault**, the app first lists what you are entitled to see about the unit (Figure 3-3). The list shows the unit’s documents with their access badges, the schematics and illustrations taken from them, and the service and repair history. **Ask about this unit** is at the bottom.

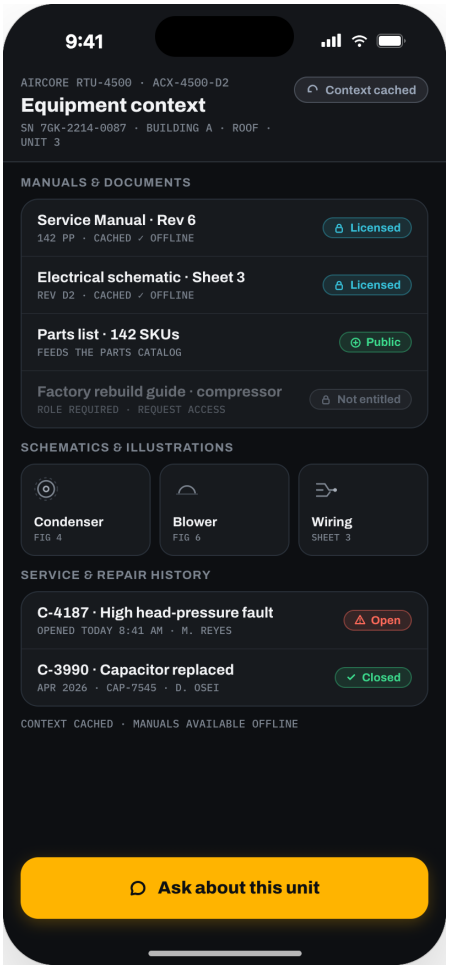


Figure 3-3 The equipment context for one unit. Sample data.

Table 3-3 Document badges

BADGE	MEANING
Licensed	A manufacturer document you can read because your shop holds the entitlement for it.
Public	A document anyone using Zylergy Field can read.
Not entitled	A document that needs an entitlement you do not hold. You see its title and can request access, but not its content.

3.4 Move around a site

Zylergy Field files each unit under its customer and site. If your shop records them, the unit is also filed under its building, its floor or zone, and its system, down to its sub-assemblies. From a unit's chart you can open the building it is in and see the other units there. From a building you can open any unit and its history. Your office maintains this structure in the web console, or it comes from your shop's field-service system. The structure for the day's sites is included in your offline pack.

3.5 Read a unit's manuals

The document library holds the manuals, schematics and parts lists for each model (Figure 3-4). You can open it from the unit chart (**Manuals & documents**), from the Menu or from a citation.

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE FOR CACHED DOCUMENTS

1. On the unit chart, tap **Manuals & documents**.
2. Choose **This unit** to see the unit's documents, or **All documents** to search the whole library.
3. Tap a document to open it.
4. Use the page controls to move through the document.

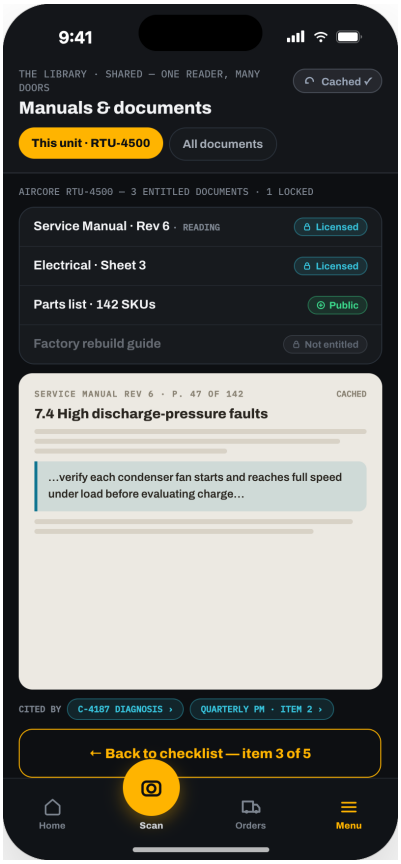


Figure 3-4 Manuals and documents for one unit. Sample data.

RESULT

The document opens. **Cached** means it is stored on the device and is available offline.

Under each document, the library shows where it is cited, for example by a diagnosis or a checklist item. Tap a citation to go there. If you opened the document from a checklist or a diagnosis, a button takes you back.

A document you are not entitled to read shows its title with **Locked** or **Not entitled**. Tap **Request** to ask for access. Your shop holds entitlements through its agreements with manufacturers. See the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01), chapter “The Company Brain: the document library.”

3.6 Read the service log

The *service log* is the append-only history of a unit. It lists repairs, diagnoses, maintenance, orders and returns by date (Figure 3-5). The assistant also cites this log.

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE

1. On the unit chart, tap **Service log & history**.
2. Choose **This unit**, or the tab for all units in your shop.
3. To filter, tap **All**, **Maint**, **Diag**, **Orders** or **Returns**.
4. Tap an entry to open it.



Figure 3-5 The service log for one unit, filtered by type. Sample data.

RESULT

The entry opens with its details: who did what, when, with the findings, sources and orders linked to it.

Entries cannot be edited or deleted. A correction is added as a new entry linked to the original.

3.7 Units your shop has not set up yet

If the app recognizes a unit that is not in your shop's records, it tells you why (Table 3-4).

Table 3-4 When the app recognizes a unit your shop has not set up

WHAT YOU SEE	WHAT IT MEANS	WHAT TO DO
The unit is recognized, but not on your shop's roster for the site	The model is known, but this unit has not been added to the customer's site.	Tap the option to add it to the site (on iPad, **Add to** and the site name). Your office may need to complete its details in the web console.
Another shop or the building owner already holds the record	The unit is already recorded in Zylergy Field by the building owner or by the contractor that created the site.	Request access to the existing record (see below).
No manuals yet for the model	The unit is recognized but the library has nothing for its model.	Capture the manual (see below).
The model is unknown	The app cannot match the nameplate to a known model.	Use **Type it**, or capture the unit and its manual.

A unit added to your shop gets its model's published checklist. Its maintenance schedule starts from its install or in-service date.

Request access to a unit someone else already holds

If the building owner or another contractor already recorded the unit you scanned, Zylergy Field offers to attach your shop to the existing record. It does not create a second record.

TECHNICIAN · IPHONE OR IPAD · NEEDS A SIGNAL

1. Identify and confirm the unit ("Identify a unit by its nameplate" on page 18). The app shows that an existing record matches the unit, with the site and the unit's identity only.
2. Choose to request access to the record.
3. Confirm the request.

RESULT

The request goes to the building owner through the customer portal, or to the contractor that created the site record. Until they approve it, you see only the unit's identity. Your shop has no access to the unit's history, documents or condition while the request is pending, or if it is declined. Requests and decisions are recorded.

When the request is approved, your shop is attached to the customer's site and sees the shared record within its own entitlements. The record is not copied.

3.8 Capture a manual for a unit without documents

When the library has no documents for a model, the assistant has nothing to answer from (Figure 3-6). You can look for the manufacturer's documents on the web. You can also capture the manual so that it is there next time.

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE (SENT WHEN YOU ARE BACK ONLINE)

1. On the screen that shows **No manuals yet for this model**, tap **Capture this manual**.
2. Attach the PDF, or photograph the manual's pages.
3. Confirm the model the manual belongs to.
4. Submit the manual.

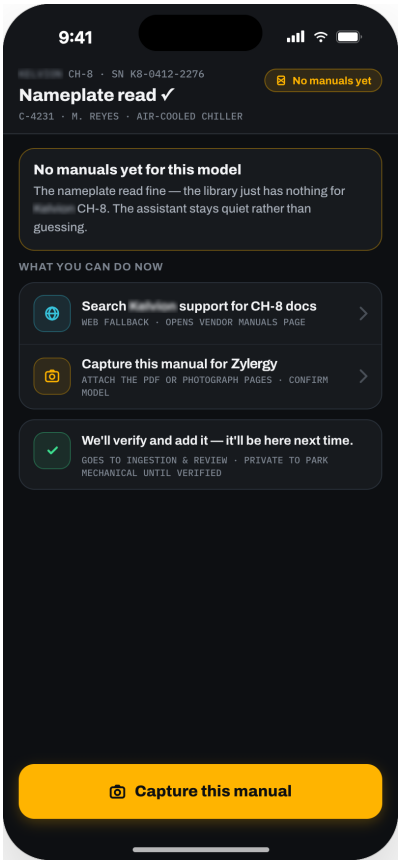


Figure 3-6 No manuals yet for a model. Sample data.

RESULT

The manual goes to review. **In review** shows on the unit until the manual is published. Without a signal, the submission waits on the device and is sent when you are back online.

An administrator in your shop reviews each captured manual. This is often the shop owner or a member of the office staff who holds the **Admin** role. Reviewed manuals join the shared library, which only licensed and approved contractors can use. Zylergy handles copyright and licenses, and removes a document when the rights holder asks. You get a notification when the manual is published, or when it is rejected, with the reason.

The web search option opens the manufacturer's support or manuals page. Web results are not verified manuals. The app keeps them separate from your library.

4

CHAPTER 4

Diagnosing a fault

IN THIS CHAPTER

- How the assistant works 29
- Ask about a unit 30
- Answer the assistant's questions 31
- Read the likely cause 32
- Open the cited source 33
- When the documents do not cover the question 35
- Diagnose by voice 35
- Documents you are not entitled to 36

The assistant helps you work from a symptom to a likely cause. It uses the manuals for the unit in front of you and the unit's service log. It shows the page it used for each answer, and it tells you when the documents do not cover a question.

4.1 How the assistant works

- **This unit only.** The assistant uses the documents for the unit's model that you are entitled to read and the unit's service log. If your shop has them, it also uses verified field reports and notes for that model. It cannot see documents you are not entitled to read.
- **Sources.** Each answer that draws on a document cites the document and page. Tap the *citation* to open the page with the passage highlighted.
- **Questions.** For a symptom, the assistant asks questions that separate one cause from another. It ranks the likely causes again after each answer or reading.
- **Confidence.** Each likely cause has a *confidence* level in words, such as **High confidence**, and the number of manual sections it aligns with. Confidence is calibrated against the outcomes of recorded repairs. When confidence is low, the assistant shows two or more plausible causes and asks you to open the sources. It may also decline to name a cause.

- **Recorded outcomes.** When a repair is saved with whether it worked, the assistant uses that outcome, along with the manuals, in later answers for that model.
- **Unit history.** The assistant takes repeat faults on the unit into account.
- **Condition data.** For a connected unit (“Condition-based maintenance” on page 76), recent operating values are one more input to the diagnosis.
- **Signal.** The assistant needs a network connection. Without a signal you can still open the manuals on the device. Ask the question again when you are back online.

4.2 Ask about a unit

You can describe a symptom, ask for a procedure, or look up a specification (Figure 4-1).

TECHNICIAN · IPHONE OR IPAD · NEEDS A SIGNAL

BEFORE YOU BEGIN

- The unit is identified and confirmed, and its chart is open.

1. On the unit chart, tap **Diagnose a fault**. The equipment context opens (Figure 3-3).
2. Tap **Ask about this unit**.
3. Tap **Describe a symptom**, **Ask for a procedure** or **Look up a spec**, or go straight to the input field.
4. Type your question, or tap the microphone and speak it.
5. Tap the send button.

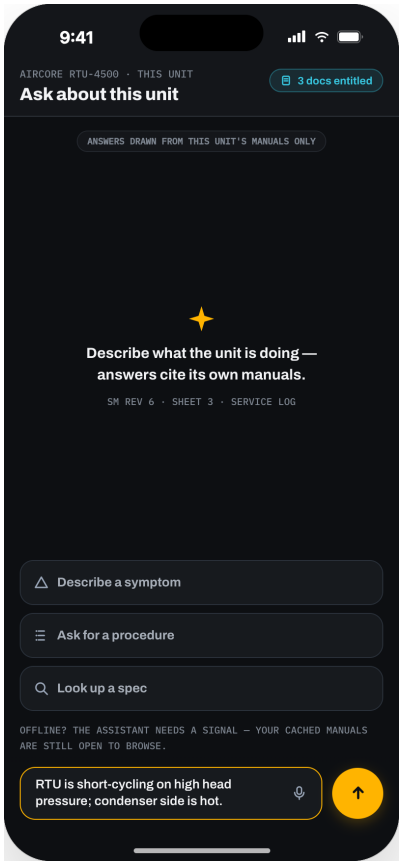


Figure 4-1 Ask about this unit. Sample data.

RESULT

The assistant reads the unit's manuals and log, then answers or asks a question to narrow the cause.

The header shows how many documents you are entitled to for this unit. The note under it says that answers come only from this unit's manuals.

4.3 Answer the assistant's questions

For a symptom, the assistant usually asks one or more questions before it names a cause (Figure 4-2). Each question shows the manual sections the assistant is working from, with a citation you can open.

TECHNICIAN · IPHONE OR IPAD · NEEDS A SIGNAL

1. Read the question.
2. Check the unit as the question asks.
3. Tap the quick answer that matches what you see, or type your own answer in **Or type what you see**.
4. If you have a reading, such as a pressure or a voltage, include it in your answer.

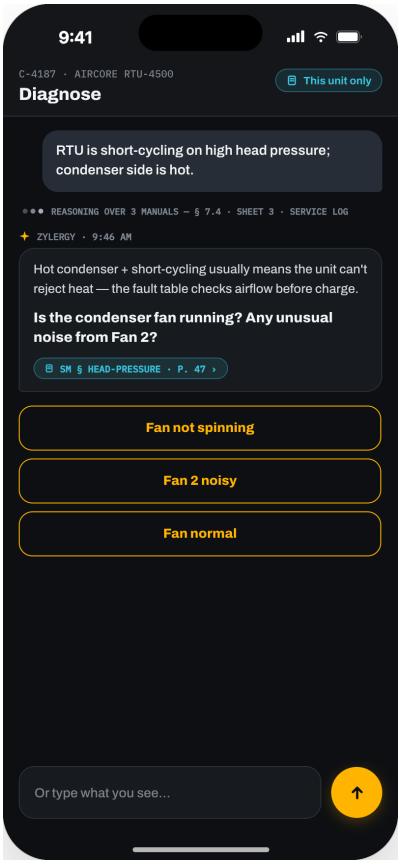


Figure 4-2 A clarifying question with quick answers. Sample data.

RESULT

The assistant ranks the likely causes again and either asks another question or shows the likely cause.

4.4 Read the likely cause

When the evidence is strong enough, the assistant shows the likely cause (Figure 4-3).

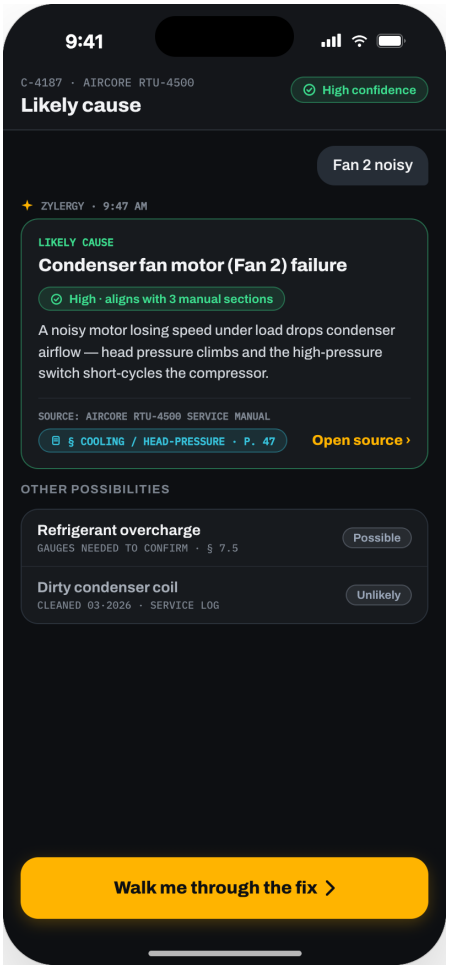


Figure 4-3 The likely cause, with its confidence and source. Sample data.

Table 4-1 What is on the likely-cause screen

AREA	WHAT IT SHOWS
Likely cause	The cause the evidence supports best, with a short explanation of why.
Confidence	The confidence in words, for example **High confidence**, and how many manual sections it aligns with.
Source	The document and section the answer comes from, with **Open source**.

Other possibilities	The other causes considered, each marked by how likely it is, for example **Possible** or **Unlikely**, with what would confirm or rule it out.
Walk me through the fix	Opens the cited repair steps (Chapter 5).

When confidence is low, the screen says so. It shows two plausible causes and asks you to open the sources to confirm. Check a cause against the unit and the cited page before you act on it.

If the repair is likely to need a part, the assistant lists the candidate parts with the diagnosis, ranked by likelihood. You can check stock or order the part before you start. A part is ordered only when you confirm it in the parts flow (Chapter 6).

4.5 Open the cited source

To check an answer, open the page it cites (Figure 4-4).

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE FOR CACHED DOCUMENTS

1. On the answer, tap **Open source** or the citation chip. The document opens at the cited page with the passage highlighted.
2. Read the passage and the text around it.
3. Use the page controls to read the previous or next page.
4. Tap **Back to diagnosis**.

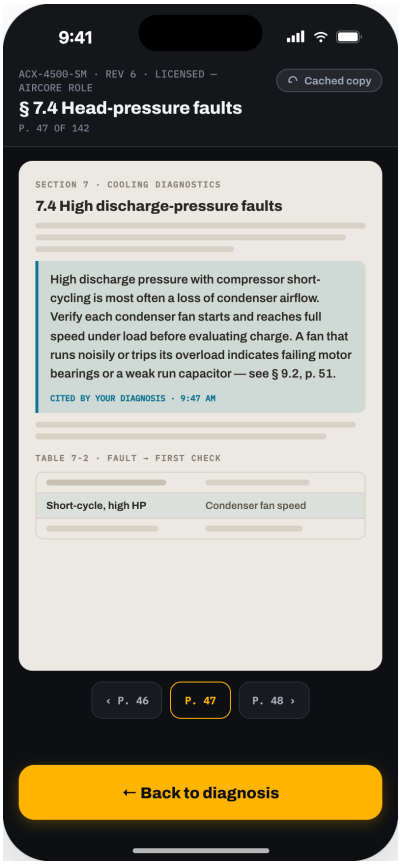


Figure 4-4 The cited page, with the passage highlighted. Sample data.

RESULT

You are back in the conversation where you left off.

Cached copy in the header means the page is stored on the device. A note under the page says that the highlighted passage is the one the answer used.

4.6 When the documents do not cover the question

If the documents available to you do not support an answer, the assistant says so (Figure 4-5). It offers these options:

- **Closest section**: opens the nearest section the manuals do have.
- **Escalate to the office with this thread**: sends the conversation to your office.
- **Search** the manufacturer's support site: opens the web page. Web results are not verified manuals.
- A document that might cover the question but is not in your entitlements is listed with **Request**.

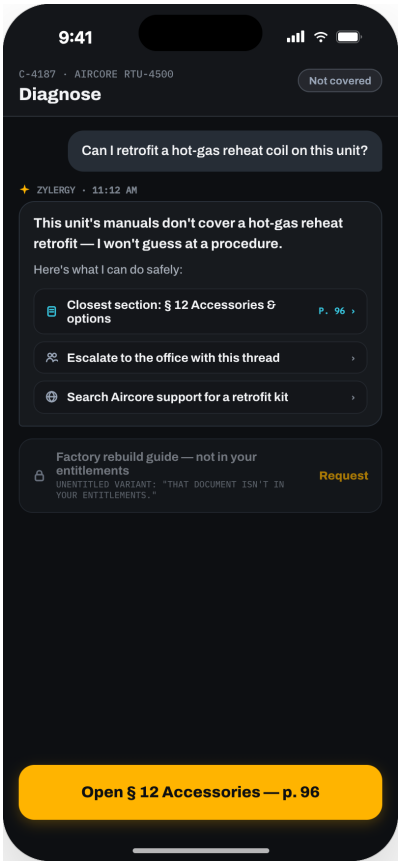


Figure 4-5 A question the manuals do not cover. Sample data.

The header shows **Not covered**. Treat the question as unanswered.

4.7 Diagnose by voice

When your hands are busy, for example inside a cabinet with gloves on, you can run the diagnosis by voice. Spoken answers give the ranked causes, citations and confidence that the screen shows. When the documents do not cover a question, the assistant says so by voice. Before it gives guidance that matters for safety or for the outcome of the repair, the assistant asks you to confirm by voice. You can switch back to the screen at any time.

> **⚠ 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.

4.8 Documents you are not entitled to

Some manufacturer documents are licensed only to shops that hold the manufacturer's authorization. Zylergy Field checks your entitlement each time a document is opened in the app or the web console, or used by the assistant. If you see **Not entitled** or **Locked**, the document exists, but you do not hold the entitlement role for it. Your administrator can tell you which entitlement roles your shop holds and assign you to them. See the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01), chapter "Users and roles."

> TIP
>
> On iPad, the conversation and the cited page sit side by side, so you can read the manual while you answer the assistant's questions. See "Diagnose beside the cited page" on page 88.

5

CHAPTER 5

Repairing a unit

IN THIS CHAPTER

- Follow cited repair steps 37
- Other ways to follow repair guidance 39
- When a step needs a part 40
- Resume a repair when parts arrive 41
- Save the repair to the service log 41
- Share what you learned 42
- Repeat repairs and replacement suggestions 43

From a likely cause, the assistant takes you through the repair one step at a time. Each step cites the page of the manual it comes from. If a step needs a part, the repair case waits until the part arrives. When you finish, save the repair to the unit's service log so that the next technician can see it.

5.1 Follow cited repair steps

The repair screen lists the steps from the manual, each with the page it comes from (Figure 5-1).

TECHNICIAN · IPHONE OR IPAD · NEEDS A SIGNAL TO OPEN · STEPS STAY ON SCREEN 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. On the likely cause, tap **Walk me through the fix**, or ask for the procedure.
2. Read the caution line above the steps. It shows the cautions the manual gives for this procedure, such as voltage and lockout before step 1, and whether refrigerant handling applies.
3. Read step 1.
4. If you need to check the page, tap the step's citation.
5. Do the step.
6. Tap **Mark step 1 done**. The step collapses and the next step becomes current.
7. Repeat for each step.

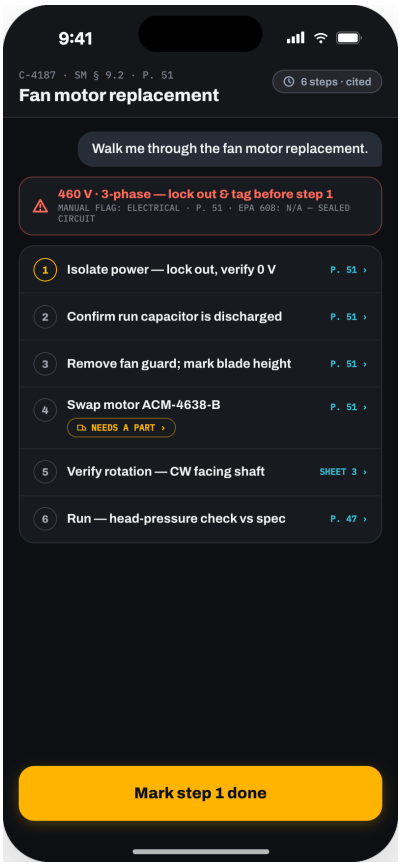


Figure 5-1 Cited repair steps, with the manual's caution. Sample data.

RESULT

Each step is checked off as done. When the last step is done, the app offers to save the repair to the service log ("Save the repair to the service log" on page 41).

> NOTE
>
> The steps come from the manufacturer's documentation for the unit. If a step or a value on the screen differs from the printed manual, follow the manual and report the difference to your office.

5.2 Other ways to follow repair guidance

For some content and devices, the repair guidance is also available in other forms (Table 5-1). Each form uses the documents you are entitled to and shows the citations. If a form is not available, the app shows the cited text steps.

Table 5-1 Forms of repair guidance

FORM	WHAT IT IS
Text steps	The cited steps described in “Follow cited repair steps” on page 37. Always available.
Video walkthrough	A video of the procedure, stepped with the text.
Interactive schematic	A schematic you can pan and zoom. Select a component to trace its circuit or assembly. The component links to the diagnosis, its parts and its procedures.
Overlay on the equipment	The schematic or the current step shown over the camera view of the unit.
Hands-free guidance	The steps read aloud and confirmed by voice, with smart glasses where supported.

⚠ 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.

5.3 When a step needs a part

If a step needs a part, the repair screen marks it **Needs a part**. Tap the marker to open the part hand-off (Figure 5-2).

TECHNICIAN · IPHONE OR IPAD

1. On the step marked **Needs a part**, tap the marker. The part is shown with the unit and case already filled in.
2. If the part is already on your truck, tap **On hand**.
3. If you need to order the part, tap **Find & order this part**. The parts flow opens for this unit, with the part selected (Chapter 6).

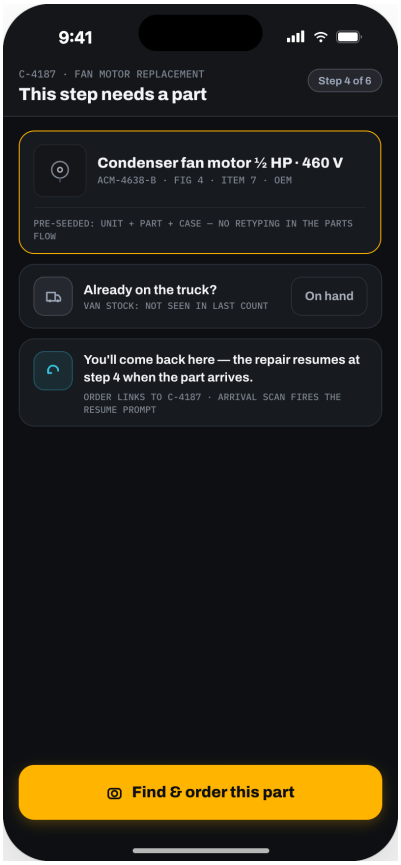


Figure 5-2 A step that needs a part, with the part already identified. Sample data.

RESULT

The order is linked to the repair case. The repair resumes at that step when the part arrives.

If parts ordering is not set up for your shop, the app shows the part reference so you can source it another way.

5.4 Resume a repair when parts arrive

A *case* keeps the diagnosis, the repair steps and the linked orders together. Work can stop while parts are on order and continue later at the step where it stopped.

TECHNICIAN · IPHONE OR IPAD

1. When the part arrives, open the notification, or tap **Resume** under **Pick up where you left off** on the Home screen.
2. Identify and confirm the unit (“Identify a unit by its nameplate” on page 18).
3. Continue from the step the repair stopped at.

RESULT

The repair continues at the step that needed the part, with everything you worked out still on the case.

5.5 Save the repair to the service log

When the repair is done, save it to the unit’s service log (Figure 5-3). The entry records the cause, the work done, the sources used and any part order. The next technician who scans the unit sees it.

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE (SENT WHEN YOU ARE BACK ONLINE)

1. Check **Cause**, and correct it if what you found differs.
2. Check **Done**, which describes the work and whether the fix worked.
3. Check **Sources** and **Part order**.
4. Tap **Add a note or photo — optional**.
5. Tap **Save to service log**.

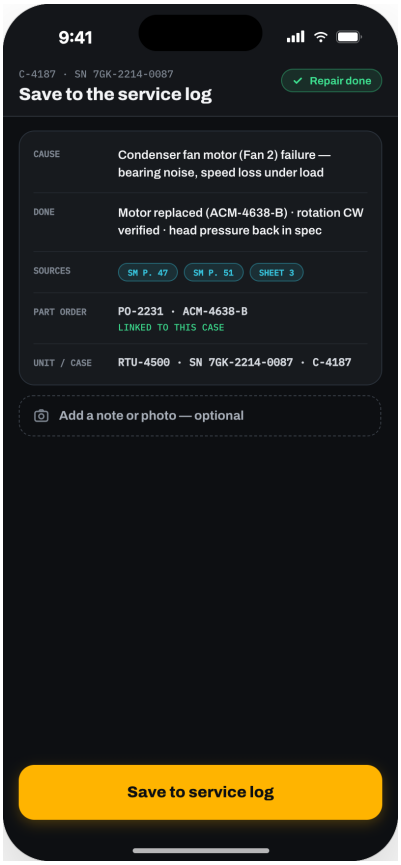


Figure 5-3 Save to the service log. Sample data.

RESULT

The repair is logged against the unit and is visible on the next visit. Without a signal, the entry is saved on the device and sent when you are back online.

Record whether the fix worked. The assistant uses that outcome when it weighs the same cause on this model later, for you and for other technicians.

5.6 Share what you learned

If a repair taught you something the manual does not say, you can record it as a field report. A field report describes what you saw and what worked, with photos or a short recording, and is tied to the unit's model. The app may prompt you to add one. The report records who contributed it and that you consented. It is reviewed like a manual before anyone else can see it or the assistant can use it.

5.7 Repeat repairs and replacement suggestions

If a unit has needed the same repair several times within a period your shop sets, the unit chart can suggest a replacement quote. It can also suggest one when a connected unit's condition data shows it nearing the end of its life. You can dismiss the suggestion, defer it or pass it to your office. If you pass it on, Zylergy Field creates a lead with the unit's repair history for your shop's sales staff. If your shop's field-service or customer relationship management (CRM) system is connected, the lead is also written there.

6

CHAPTER 6

Finding and ordering parts

IN THIS CHAPTER

- Browse the parts catalog 45
- Identify a part from a photo 46
- Compare OEM and compatible parts 49
- Choose a source 50
- Review the cart 51
- Get the customer's approval 52
- Choose delivery or pickup 53
- Place the order 54
- Orders that need approval 55
- Refrigerant-restricted parts 55
- Ordering offline 55

To order a part, photograph it or find it in the unit's parts catalog. The app matches a photo against the unit's own catalog. You choose a source, the customer approves the total on your device, and the order is placed for delivery or pickup. Table 6-1 lists the steps and their screens.

Table 6-1 Steps and screens in the parts flow

STEP	SCREEN
Open the unit's parts catalog	**Parts catalog**
Photograph the part and match it	Camera, then **Match found** or **A few possible matches**
Compare OEM and compatible parts	Part detail
Choose where it comes from	**Choose source**
Review the cart	**Cart**
Get the customer's approval	**Customer sign-off**

Choose delivery or pickup	**Ship it where?**
Place the order	**Order placed**

The sections below follow these steps.

6.1 Browse the parts catalog

Each unit has its own parts catalog, limited to its model and serial number range (Figure 6-1). Catalogs for the day's units are in your offline pack.

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE FOR PACKED UNITS

1. On the unit chart, tap **Find a part**.
2. To search, enter a part name, part number or figure reference in the search field.
3. To browse, tap an exploded diagram.
4. Tap a numbered callout on the diagram.
5. Tap a part to open its detail.

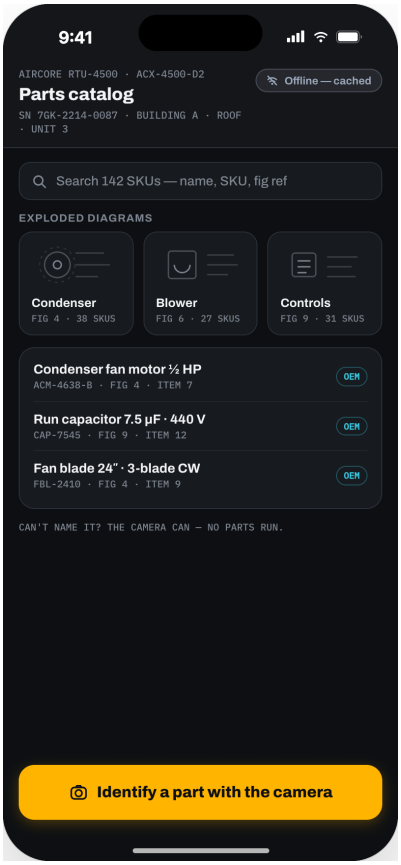


Figure 6-1 The parts catalog for one unit. Sample data.

RESULT

The part detail opens ("Compare OEM and compatible parts" on page 49).

The catalog lists parts by component group. Each part shows its original equipment manufacturer (OEM) equivalents and superseded parts. You can filter the list to the parts most often replaced on the model. If you cannot name the part, tap **Identify a part with the camera**.

6.2 Identify a part from a photo

The app matches your photo against this unit's catalog on the device. It works without a signal (Figure 6-2).

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE

1. On the parts catalog, tap **Identify a part with the camera**.
2. Fill the frame with the part, and include its label if you can.
3. Take the photo.
4. To add a second angle or a label shot, tap the add tile.
5. Take another photo.
6. Tap **Match**.



Figure 6-2 Photographing a part from two angles before matching. Sample data.

RESULT

The app shows either one confident match (Figure 6-3) or a few possible matches (Figure 6-4).

For parts where size matters, such as belts and gaskets, the app can ask for a photo with your hand in the frame for scale. The camera cannot reliably read ratings from the body of an electrical part, so the app asks you to confirm the printed ratings. It asks for microfarads and volts on capacitors, amperage and poles on contactors, and horsepower, RPM and voltage on motors.

Confirm a confident match

1. Compare your photo with the catalog part and the exploded view.
2. Read what the match is based on, for example frame size and mounting pattern.
3. If it is the right part, tap **This is it — choose a source**.
4. If you are not sure, tap **See other candidates**.

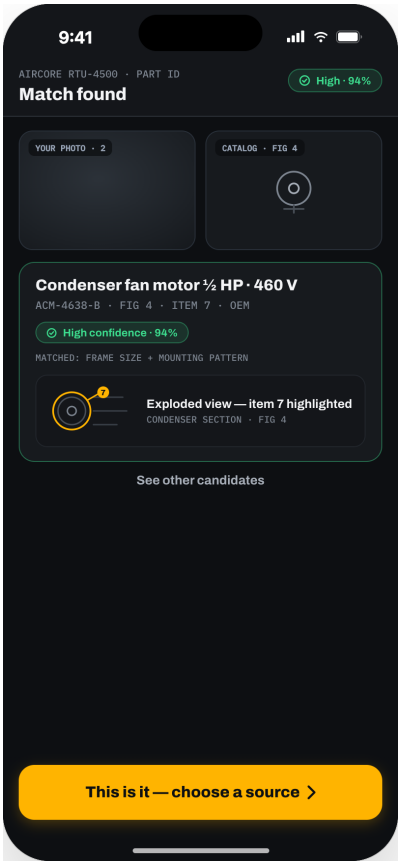


Figure 6-3 Match found: your photo beside the catalog part. Sample data.

RESULT

The part is confirmed and the source list opens (“Choose a source” on page 50).

Choose between possible matches

When the photo and label are not enough to be sure, the app shows a few candidates marked **Needs confirm** (Figure 6-4).

1. Read the reason under each candidate.
2. To check, tap **Open exploded diagram**, or tap **Add a label shot**.
3. If you chose **Add a label shot**, photograph the label.
4. Tap the candidate that matches the part on your bench.
5. Tap the confirm button, which names the part you chose.

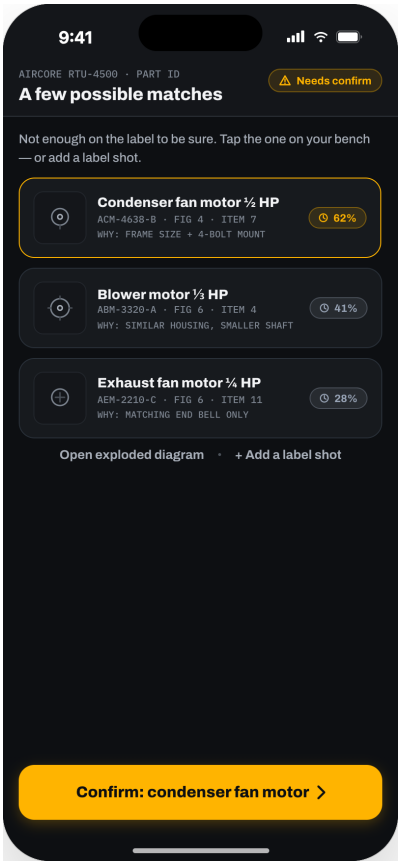


Figure 6-4 A few possible matches, each with why it was suggested. Sample data.

RESULT

The part is confirmed and its detail or source list opens.

If none of the candidates is right, choose the option for none of these. The app opens a search of the unit's catalog by part number, OEM number, description or aftermarket equivalent.

6.3 Compare OEM and compatible parts

The part detail shows the fitment tiers for the part (Figure 6-5).

- **OEM original**: the manufacturer's part, with its fit, warranty and any core return.
- **Compatible derivatives**: parts from other brands that fit, with the checks behind the claim, such as shaft, frame and mounting pattern.
- **Pairs with**: parts the manual says to replace together. Tap **Add** to put one in the cart. Kits of parts that are usually replaced together also appear here and can be expanded into single lines.
- The photo match and who confirmed it, saved to the case.

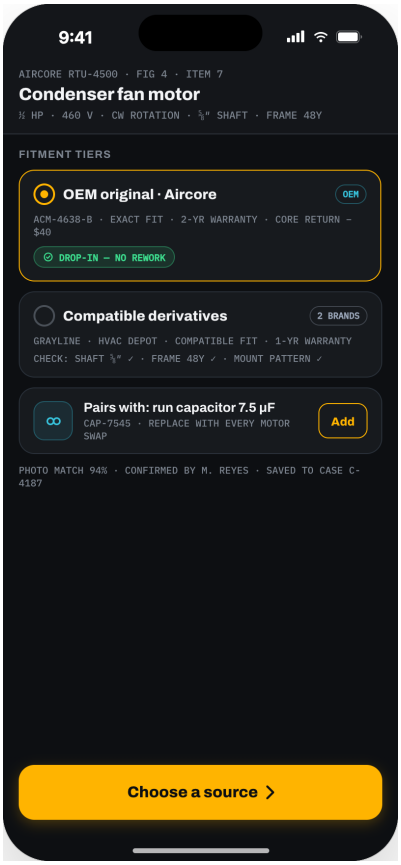


Figure 6-5 Part detail with its fitment tiers. Sample data.

The app suggests a compatible part only when the evidence for the equivalence is strong enough. When you accept, reject or defer a suggested part, your choice improves later suggestions. If a compatible part has a clear price or availability advantage, the detail says so.

Tap **Choose a source** to continue.

6.4 Choose a source

Choose source lists where the part can come from, with price, stock, delivery or pickup time, warranty and any core credit (Figure 6-6).

TECHNICIAN · IPHONE OR IPAD · NEEDS A SIGNAL FOR CURRENT STOCK

1. To sort the list, tap **Cheapest**, **In stock** or **Fastest**. The recommended source for your shop's strategy is selected.
2. Optionally, select a different source.
3. Tap **Add to cart**.

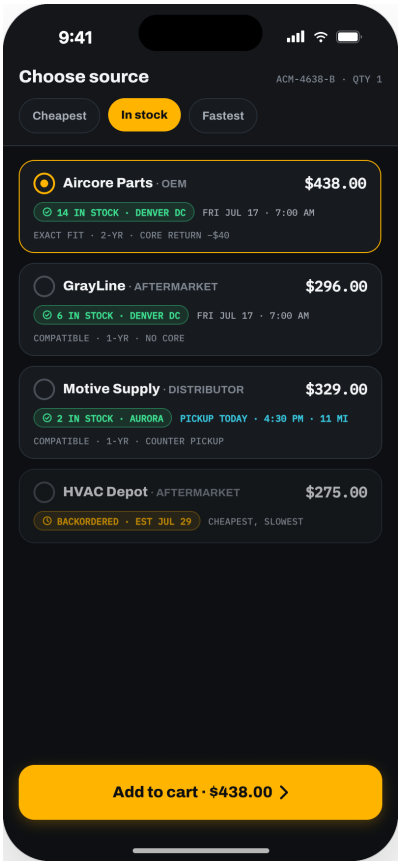


Figure 6-6 Choose source, sorted by stock. Sample data.

RESULT

The part is in the cart for the case.

Your office sets the shop's default strategy: cheapest, fastest or a preferred supplier. Some shops agree with a manufacturer to buy its parts only through a sanctioned supplier. For those parts the app does not show the comparison. The line is pinned to that supplier, and the app tells you that it is sourced per the agreement. A cart can mix parts from several suppliers, each with its own delivery or pickup.

6.5 Review the cart

The cart groups everything for one case or visit (Figure 6-7).

- Change a quantity with the stepper. Parts that belong together are marked.
- Core return credits are shown as their own lines.
- **Add another part — photograph it** returns to the camera.
- Tax is estimated in the cart and final when the order is placed, because it depends on where the order ships.
- **Review with customer** opens the customer's view of the total.

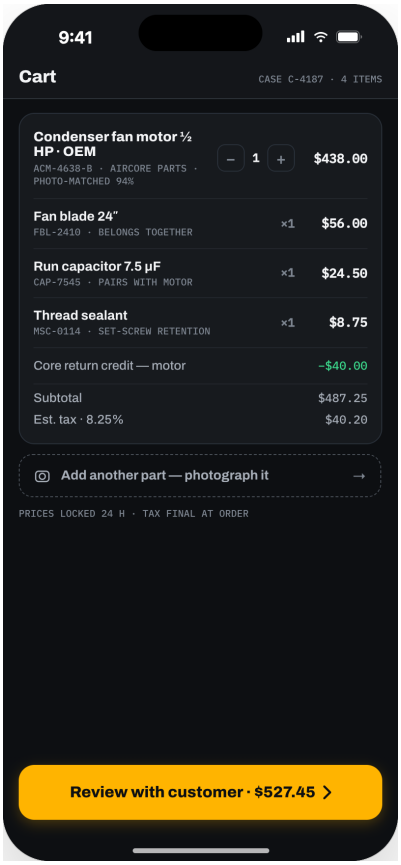


Figure 6-7 The cart for one case. Sample data.

A cart can hold many lines. It is kept if the app closes or the device restarts, and you can pause it while you work on another case. Before checkout, the case needs the customer's name and address. A job or purchase order (PO) number is optional. If your shop's field-service system is connected, these details come from the job.

The prices you see as a technician are your shop's cost. The customer sees the price with your shop's markup applied ("Get the customer's approval" on page 52). Your office sets the default markup. You can change the markup for one line or for the whole quote.

6.6 Get the customer's approval

Before an order is placed, the customer approves the total on your device (Figure 6-8). This is the *customer sign-off*.

TECHNICIAN AND CUSTOMER · IPHONE OR IPAD · WORKS OFFLINE

1. On the cart, tap **Review with customer**. The screen shows the customer's view: the site, the parts and the total with your shop's markup, without your cost.
2. Hand the device to the customer.
3. The customer reviews the total and approves it on your device, entering the details the screen asks for.
4. Take the device back.
5. Tap **Continue to delivery**.

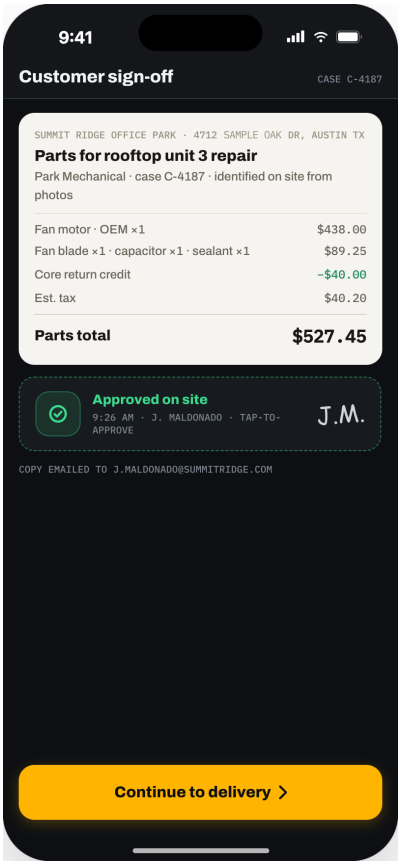


Figure 6-8 Customer sign-off, approved on site. Sample data.

RESULT

The approval is recorded with the time, and a copy is emailed to the customer.

The approval is stored with the order. You can open it later from the order detail. When the order replaces a returned part, the approval screen shows the returned amount, the new amount and the difference.

6.7 Choose delivery or pickup

Ship it where? sets where the order goes and how fast (Figure 6-9).

TECHNICIAN · IPHONE OR IPAD · NEEDS A SIGNAL

1. Choose a destination: **Customer site — dropship**, **Shop / office** or **My address**, or branch pickup where your supplier offers it.
2. Under **Speed**, choose **Overnight**, **2-day** or **Ground**.
3. Check the arrival time shown for your choice.
4. Tap **Place order**.

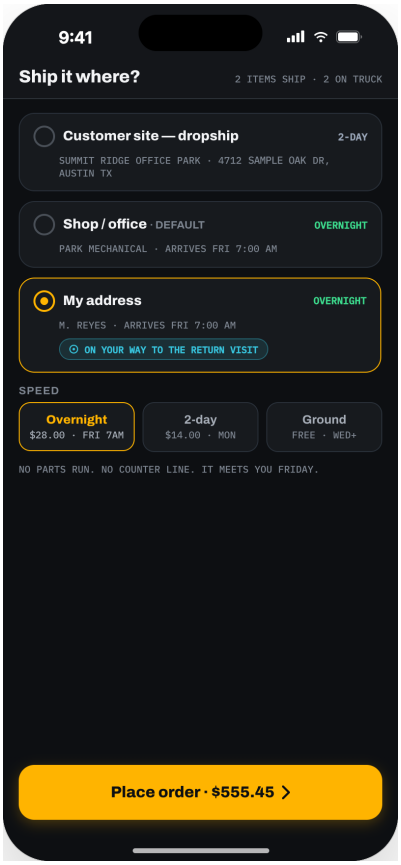


Figure 6-9 Ship it where? with destinations and speeds. Sample data.

RESULT

The order is placed (“Place the order” on page 54).

Your office sets the default destination. The screen shows which items ship and which are already on your truck.

For branch pickup, you get a pickup code and a QR code when the supplier acknowledges the order. They appear in the order detail and in an email. Show the code at the counter. When the counter scans it, the order is marked completed.

6.8 Place the order

When you tap **Place order**, Zylergy Field checks availability, authorizes your shop's payment method for the total, and sends the order to the supplier (Figure 6-10).

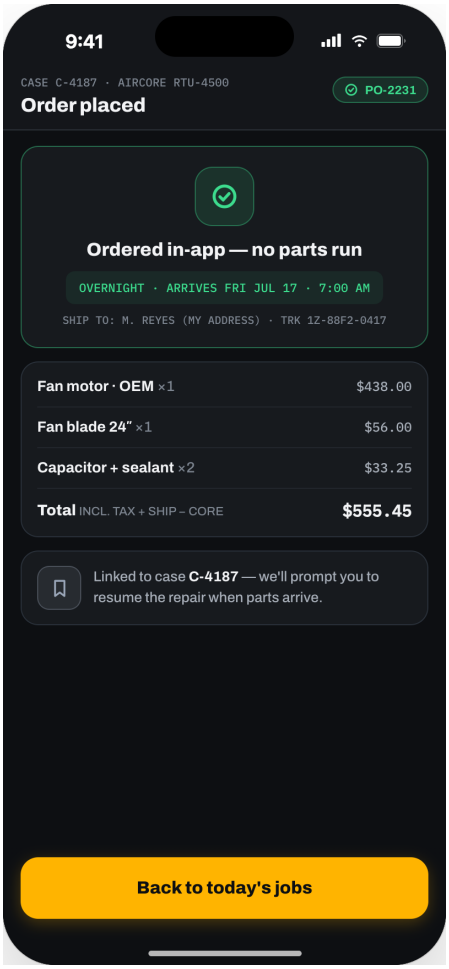


Figure 6-10 Order placed, linked to the repair case. Sample data.

The confirmation shows the order number, the arrival time and the lines ordered. The order is linked to the case, and the app prompts you to resume the repair when the parts arrive. A receipt is emailed to your shop's billing contact. Tap **Back to today's jobs** to return to your route.

If a line is on backorder, the app warns you before anything is charged. If the payment method is declined, the order is not sent, and the app shows a message for your office. Technicians cannot change payment methods. If the order needs approval, it waits for the approver first ("Orders that need approval" on page 55).

6.9 Orders that need approval

Your shop can require approval for some orders: above an amount, for some part categories, for some technicians or customer types, or a combination.

TECHNICIAN AND APPROVER ASSIGNED BY YOUR SHOP · IPHONE, IPAD OR WEB CONSOLE

1. Place the order as usual. If it needs approval, it is held with a pending status that names the approver.
2. Wait for the decision. The approver gets a notification with the order detail and approves or rejects it, optionally with a comment.
3. Open the decision notification.

RESULT

An approved order is placed. A rejected order stays unplaced, with the approver's comment.

If the approver does not respond within four business hours, the request goes to a backup approver. Approvals and rejections are recorded with the time, the approver and the comment. Approvers can also act from the work queue in the web console ("The work queue" on page 110).

6.10 Refrigerant-restricted parts

Some parts can be sold only to technicians certified to handle refrigerant. Zylergy Field flags them in the catalog.

> **⚠ 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.

If your shop does not have your EPA 608 certification on file, the app does not let you add a restricted part to the cart. Your office can authorize the order for delivery to a certified member of your team. The authorization is recorded. Your office keeps certification records, including type, number and expiration date. You get a reminder before your certification expires.

6.11 Ordering offline

You can identify a part, build the cart and capture the customer's approval without a signal. The order waits on the device and is sent automatically when the connection returns. An order that is not sent within 7 days expires. If you have been out of coverage for a long time, check your orders board.

7

CHAPTER 7

Orders and returns

IN THIS CHAPTER

- The orders board 57
- Order status 58
- Order history and reordering 59
- Reassign part of an order to another job 59
- Return a part 60
- How a return is credited 66

After you place an order, Zylergy Field tracks it through the supplier's feed until it arrives. You can act on an exception from the order line. To send a part back, report the return in the app. If the return needs a prepaid label, print it at the web console.

7.1 The orders board

The **Orders** tab shows what is arriving and which returns are in flight (Figure 7-1).

TECHNICIAN · IPHONE OR IPAD · STATUS NEEDS A SIGNAL

- **Mine**, **Crew** and **Firm** set whose orders you see.
- **Arriving** lists open orders with their arrival time. A backordered line shows its new date.
- **Returns in flight** shows each return's progress, for example reported and waiting for its label.
- **Order history** opens past orders.
- The header shows the time of the last sync. Without a signal, the board shows what is stored on the device, and arrival times are marked as stale.

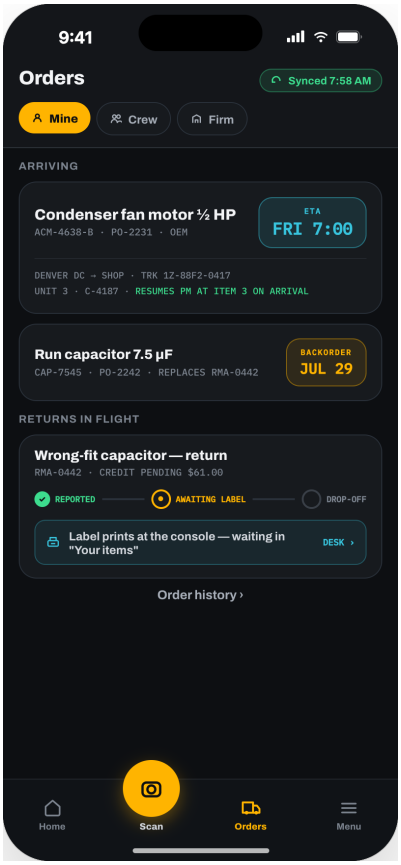


Figure 7-1 The orders board: parts arriving and a return in flight. Sample data.

7.2 Order status

Order status comes from the supplier's systems and is shown on each order line (Figure 7-2). You get a notification when an order is ready for pickup, in transit, or has an exception.

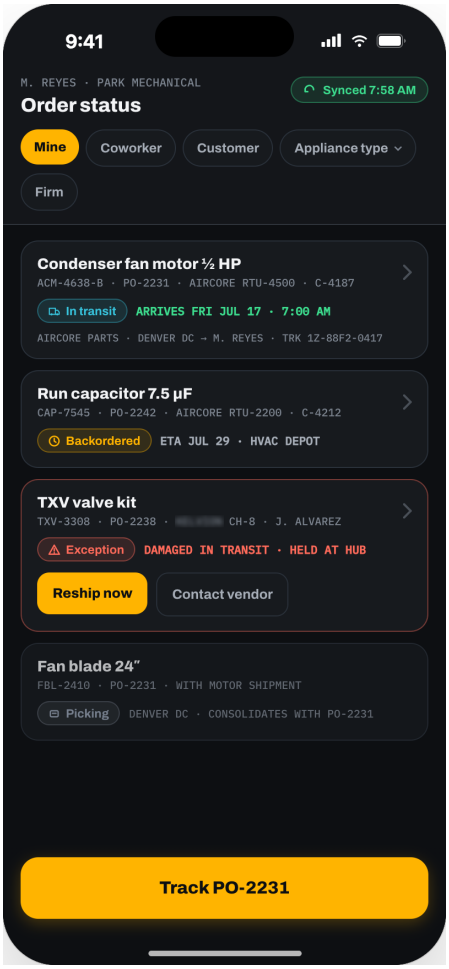


Figure 7-2 Order status, with an exception to act on. Sample data.

Table 7-1 Order statuses

STATUS	MEANING
Submitted	The order has been sent to the supplier.
Acknowledged	The supplier has accepted the order.
Picking	The supplier is picking the parts.
Ready for pickup	A branch-pickup order is waiting at the counter. Show your pickup code.
In transit	The order has shipped. The arrival time comes from the supplier's feed.

Backordered	A line is not in stock. The new date is shown.
Exception	Something went wrong, for example damaged in transit or held at a hub.
Completed	The order has been delivered or picked up.

Use the scope chips to see **Mine**, a **Coworker**'s, a **Customer**'s, an **Appliance type**, or the whole **Firm**. The **Appliance type** scope finds incoming parts for a kind of unit. Use it when a part ordered for one job is needed on another ("Reassign part of an order to another job" on page 59).

Act on an order exception

TECHNICIAN · IPHONE OR IPAD · NEEDS A SIGNAL

1. Open the order line marked **Exception**, from the notification or from **Orders**.
2. Read the exception detail.
3. To have the supplier send the part again, tap **Reship now**.
4. To speak to the supplier instead, tap **Contact vendor**.

RESULT

The reship is requested, or the supplier's contact options open. The line updates when the supplier responds. Your office also sees the exception in the work queue and can act on it there.

7.3 Order history and reordering

Order history lists your past orders. Search by order number, customer, part or unit, and filter by status. An order's detail shows its lines, the customer's approval as a PDF, the receipt and the status history.

To order the same part again, open the order and reorder from there. To return a part from a completed order, start the return from the order ("Return a part" on page 60). Order history is kept indefinitely.

7.4 Reassign part of an order to another job

When priorities change, you can move a part on order for one job to another job or another technician. Zylergy Field splits the order line and records the move. Each job is billed for what it received, and warranty records stay correct (Figure 7-3).

TECHNICIAN OR OFFICE STAFF · WEB CONSOLE

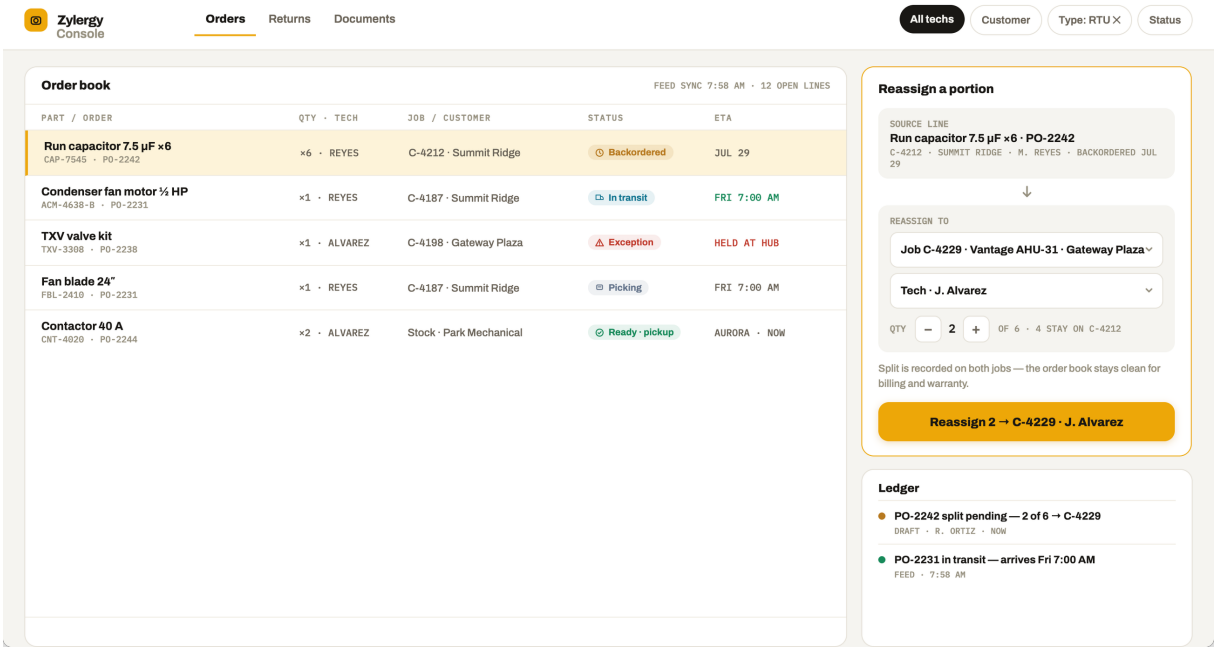


Figure 7-3 The order book, with part of a line being reassigned. Sample data.

1. In the web console, click **Orders**.
2. Click the order line you want to split.
3. Under **Reassign a portion**, choose the job to reassign to.
4. Choose the technician.
5. Set the quantity to move.
6. Click the reassign button, which names the quantity, job and technician.

RESULT

The split is recorded on both jobs and appears in the **Ledger**, with who made it and when. Cost and the customer's price move with the reassigned quantity.

7.5 Return a part

A return has five screens: find the order, choose what goes back, give the reason, choose how it goes back, and review the credit. When you submit the return on the last screen, the app shows its RMA number.

TECHNICIAN · IPHONE OR IPAD · NEEDS A SIGNAL TO SUBMIT

BEFORE YOU BEGIN

- The order is completed (delivered or picked up).
- You have the part, or know where it is.

Find the order

1. Tap **Orders**.
2. Start a return.
3. To find the order with the camera, tap **Scan to find**.
4. Photograph the nameplate and the part.
5. To browse instead, under **Or browse**, tap **Orders I placed**, **A coworker's**, **By customer** or **Whole firm**, or search by order number, part, unit or customer.
6. Tap the order.

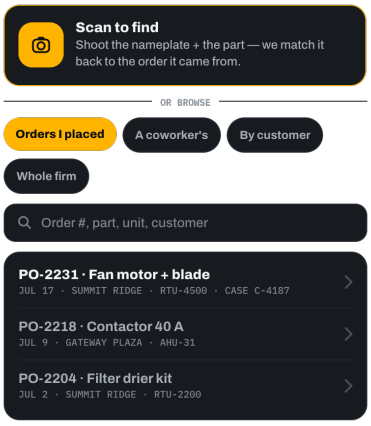


Figure 7-4 Find the order: scan the unit and part, or browse orders. Sample data.

RESULT

The order's lines open (Figure 7-5).

Scanning is optional. It is quickest when the unit is still in front of you.

Choose what goes back

1. Select each line that is going back.
2. Set the quantity for each line.
3. Tap **Choose a reason**.

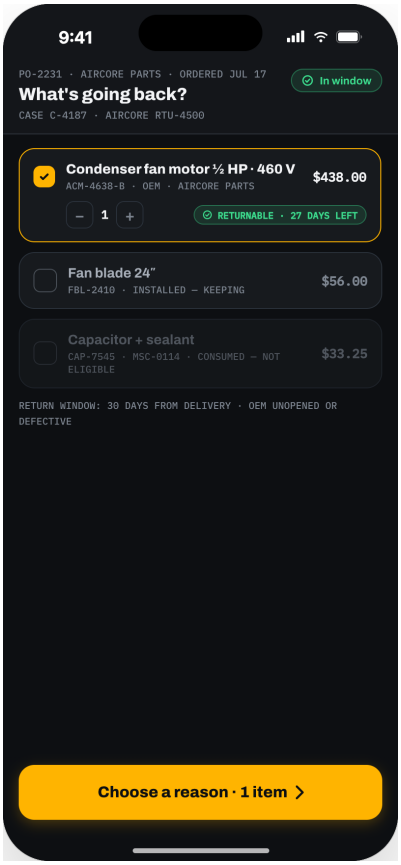


Figure 7-5 The **What's going back?** screen: the lines to return. Sample data.

RESULT

The reason screen opens.

Each line shows whether it can be returned and how long is left in the return window. Lines that were installed or consumed are not returnable. The supplier's and your shop's return policies set the return window and any fees.

Give the reason

1. Tap the reason: **Broken / defective**, **Wrong part**, **Doesn't fit**, **Not needed**, **Over-ordered** or **Other**.
2. Optionally, tap **Add a photo of the issue**. For a wrong part, the photo helps improve the part match.
3. To order a replacement in the same step, turn on **Also reorder a replacement now**.
4. Tap **How to return it**.

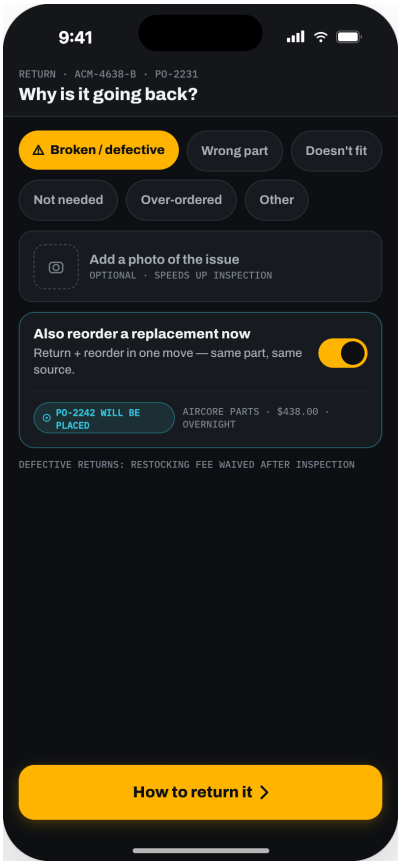


Figure 7-6 The **Why is it going back?** screen: reasons and reorder. Sample data.

RESULT

The return method screen opens.

A reason is required. A replacement ordered here is linked to the return. The customer approval for the replacement shows the returned amount, the new amount and the difference.

Choose how it goes back

1. Choose the return method:
   a. To take the part to a supplier counter, tap **Drop at a parts dealer**. No label is needed. You show the RMA number at the counter.
   b. To mail the part with a prepaid label, tap **Ship it back**.
2. Tap **Review credit**.

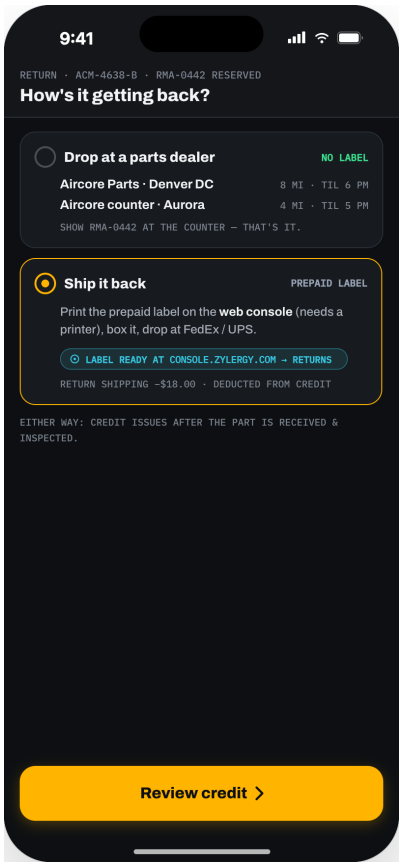


Figure 7-7 The **How's it getting back?** screen: the return methods. Sample data.

RESULT

The credit summary opens.

For **Ship it back**, the prepaid label and the ship-to address are generated with the RMA and appear in the order detail. Print the label at the web console (“Print a return label” on page 100). With either method, the credit is issued after the part is received and inspected.

Review the credit and submit

1. Read the credit summary: the part price, any restocking fee and return shipping, and the net credit.
2. Check the replacement, if you ordered one.
3. Tap **Submit return**.

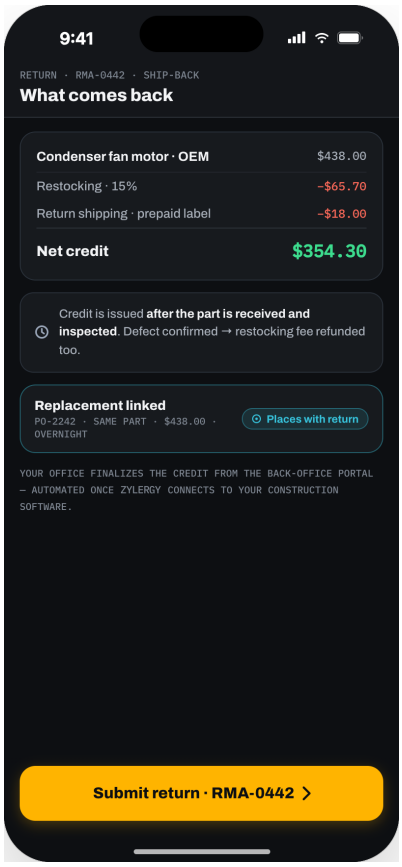


Figure 7-8 The **What comes back** screen: the net credit. Sample data.

RESULT

The return is reported and its RMA number is shown (Figure 7-9).

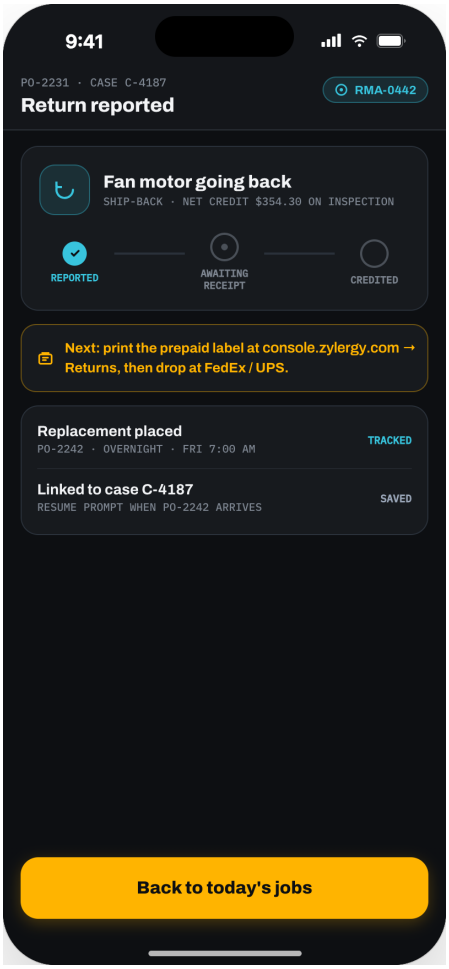


Figure 7-9 Return reported, with its progress and the next step. Sample data.

The confirmation shows the return's progress (**Reported**, **Awaiting receipt**, **Credited**) and the next step, for example printing the label at the console. If you reported a return by mistake, you can cancel it on the same business day. Tap **Back to today's jobs** to return to your route.

7.6 How a return is credited

Table 7-2 Return statuses

STATUS	MEANING
Reported	You submitted the return. For a shipped return, the RMA and label are being prepared.
Awaiting receipt	The part is on its way back to the supplier.
Credited	The supplier confirmed it received the part, and the credit has been issued.

A return is credited only when the supplier confirms that it physically received the part. You cannot mark a return as credited in the app. When the supplier confirms receipt, the credit goes back to your shop's original payment method automatically. Any restocking fee or return shipping under the return policies is deducted. Fees can be waived, for example for a defective part. The credit is itemized and confirmed by email.

Your office finalizes the credit for the job or customer in the web console ("Returns and credits" on page 103). If your shop's field-service system is connected, the credit is also written there.

8

CHAPTER 8

Running maintenance

IN THIS CHAPTER

- What is due 69
- The checklist 70
- Record a pass or fail finding 71
- Record a reading 72
- When a finding points to a part 73
- Complete and log the checklist 75
- Correct a logged finding 76
- Condition-based maintenance 76
- The watch list in the field 76

Scheduled maintenance in Zylergy Field runs from checklists. Each checklist is derived from the manufacturer's service manual. An administrator reviews and publishes it before use. The app checks each reading against its acceptance range as you enter it. A finding that points to a part can open the parts flow. The completed checklist is saved as one entry on the unit's service log.

8.1 What is due

Maintenance that is due appears on your route on the Home screen, as a status chip on the unit chart (for example **PM due today**), and on the unit's **Maintenance** screen (Figure 8-1).

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE

1. On the unit chart, tap **Run maintenance**.
2. Read what is due: the checklist name, its template version, the number of items, and when it was last completed.
3. Check the other units at the site, listed below with their status.
4. Tap **Start the checklist**.

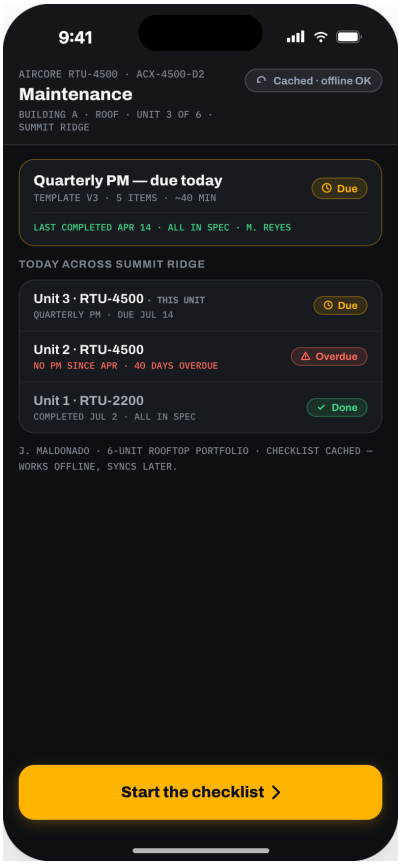


Figure 8-1 Maintenance due on the unit and at the site. Sample data.

RESULT

The checklist opens with its items listed (Figure 8-2).

Your office schedules maintenance in the web console. You get a reminder before maintenance comes due and when it is overdue. A checklist stored on the device works without a signal. The results are sent when you are back online.

8.2 The checklist

A *checklist template* is a versioned list of maintenance items for one equipment model (Figure 8-2). Each item says what to do, what kind of finding it needs and where in the service manual it comes from.

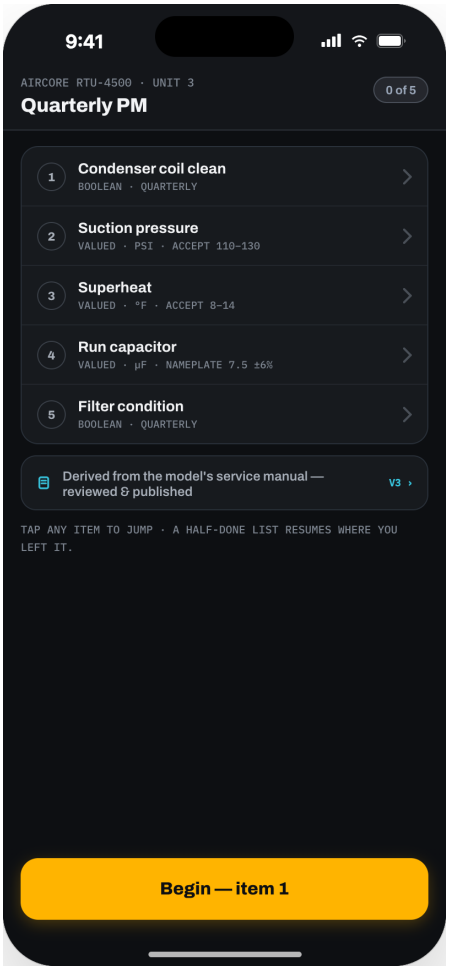


Figure 8-2 The checklist, with its items and ranges. Sample data.

Table 8-1 Checklist item types

TYPE	SHOWN AS	WHAT YOU RECORD
Pass or fail	**Boolean**	**Pass** or **Fail**. A fail asks for the reason.
Reading	**Valued**, with the unit and the acceptance range, for example **Valued · PSI · Accept 110–130**	The measured value. The app shows the verdict.
Not applicable	**N/A: skip** on any item	The reason the item does not apply

The note at the bottom of the list says that the checklist was derived from the model's service manual, reviewed and published. Tap **Begin — item 1** to start, or tap any item to go to it. If you stop partway through, the checklist resumes where you left off. The Home screen offers it under **Pick up where you left off**.

8.3 Record a pass or fail finding

A pass takes one tap. A fail asks for the reason (Figure 8-3).

TECHNICIAN · IPHONE OR IPAD · 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.

To record a pass:

1. Do the check described on the item.
2. Tap **Pass**.

To record a fail:

1. Do the check described on the item.
2. Tap **Fail**.
3. Under **Fail — capture the reason**, describe what you found.
4. Optionally, add a photo.
5. Tap **Save — next item**.

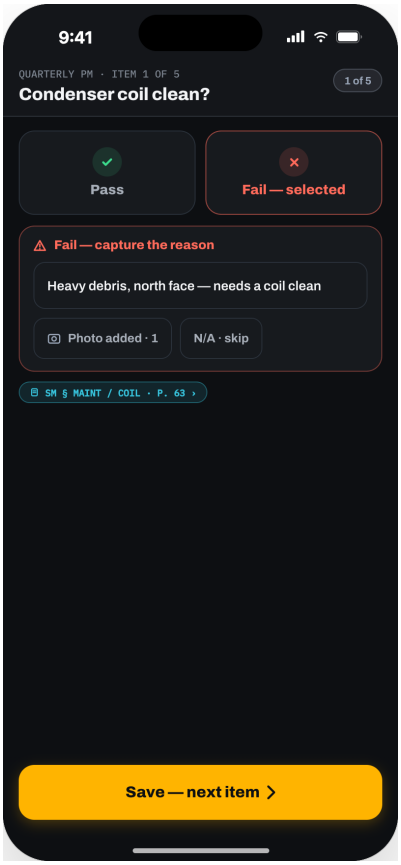


Figure 8-3 A failed item, with the reason and a photo. Sample data.

RESULT

Your finding is saved on the device and the next item opens.

If an item does not apply to this unit, tap **N/A: skip** and give the reason. The citation under each item opens the page of the service manual the item comes from.

8.4 Record a reading

A reading item shows the value you enter against its *acceptance range*, and its trend across earlier visits (Figure 8-4).

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE

1. Take the measurement the item asks for.
2. Enter the value. The app shows the reading against the item's acceptance range and marks the verdict.
3. If the reading is out of spec, tap **Photo** or **Add note** to record what you see.
4. Tap **Save reading**.

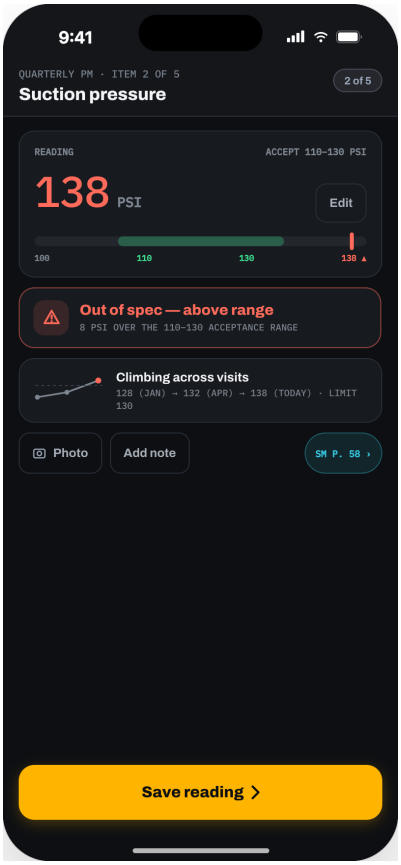


Figure 8-4 A reading above its range, with its trend. Sample data.

RESULT

The reading is saved with its verdict and the next item opens.

Table 8-2 Reading verdicts

VERDICT	MEANING
In spec	The reading is inside the acceptance range.
Attention	The reading is inside the range but close to a limit.
Out of spec	The reading is outside the acceptance range. It is flagged on the maintenance event.

Each verdict has a color, an icon and a label. The trend shows, for example, a pressure that has climbed at each quarterly visit. Your office sees this history too. Units that trend toward a limit can appear on the shop's watch list ("The watch list in the field" on page 76).

8.5 When a finding points to a part

When a reading is out of spec or a component has failed, the app can offer the part the finding points to (Figure 8-5). You can still finish the checklist.

TECHNICIAN · IPHONE OR IPAD

1. Read the primary candidate part and any alternative, such as a cheaper component to test first.
2. Choose what to do:
   a. Tap **Find & order the part** to open the parts flow for this unit with the part selected (Chapter 6).
   b. Tap **Add to close quote** to add the part to the quote you present at the end of the visit.
   c. Tap **Flag for follow-up** to leave it for your office.
   d. If the part is already on your truck, tap **Mark on hand instead**.

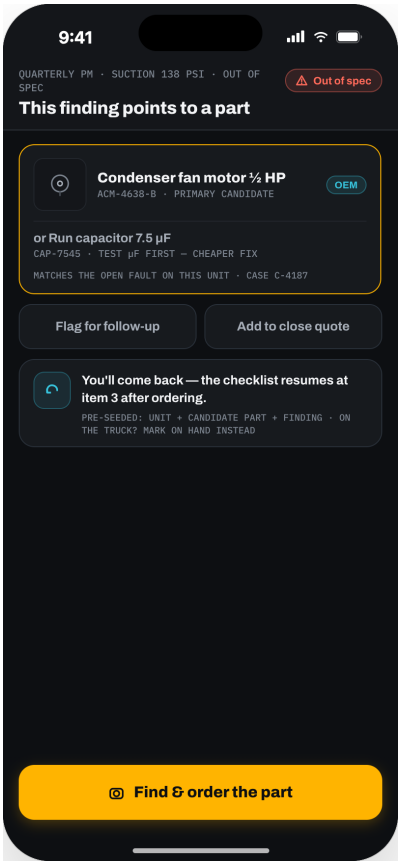


Figure 8-5 A finding that points to a part. Sample data.

RESULT

The checklist resumes at the item you were on. A part order or follow-up flag is linked to the finding and shows on the checklist summary.

8.6 Complete and log the checklist

After the last item, the app shows a summary of the checklist (Figure 8-6).

TECHNICIAN · IPHONE OR IPAD · WORKS OFFLINE

1. Review the summary. Each item shows its finding. Failed and out-of-spec items are marked.
2. Check any linked part order and the next due date shown under it.
3. Tap **Complete & log**.

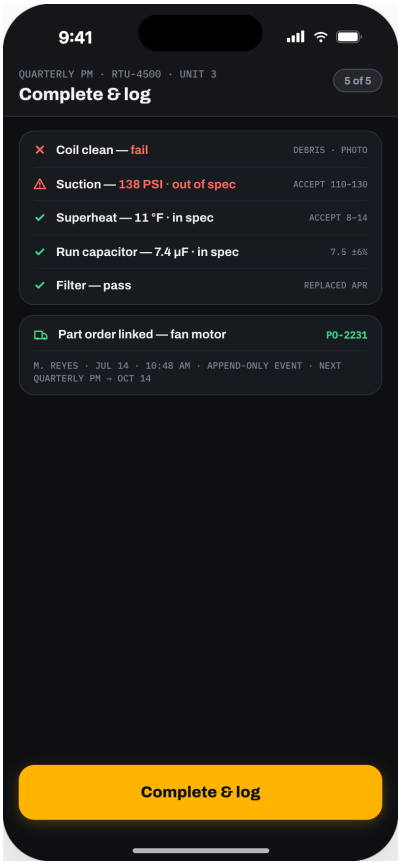


Figure 8-6 The checklist summary before it is logged. Sample data.

RESULT

The completed checklist is saved as one maintenance event on the unit's service log, and the next due date for this checklist moves forward. If you are offline, the event is sent when your device is back online.

The maintenance event records the checklist version, each finding with its notes and photos, who did the work and when. A checklist completed without a signal waits on the device until it is sent.

8.7 Correct a logged finding

The service log is append-only. Entries cannot be edited or deleted. If a finding was recorded wrongly, the correction is added as a new entry linked to the original. Both entries remain visible.

8.8 Condition-based maintenance

Most maintenance runs on intervals, such as every quarter or every season, as the manufacturer specifies. If your shop has connected a unit's building management system or connected-equipment platform to Zylergy Field, the unit's condition can also trigger maintenance.

- **Condition data.** A connected unit reports its operating values to Zylergy Field. Zylergy Field learns the unit's normal operating range from its model and its own history. It flags departures from that range.
- **Condition-triggered work.** An anomaly or an estimated failure risk can raise a maintenance action for the unit. Interval maintenance continues, and condition-based work is added to it.
- **Condition-aware checklists.** Items or limits can be added or adjusted for the unit's current condition. The items derived from the manual stay on the checklist.
- **Recorded with the work.** The maintenance event records the condition or estimate that triggered it, so the next technician and your office can see why the work was done.
- **Parts ahead of failure.** When an estimate points to a component, the app can recommend the part before the component fails. A part is ordered only when you confirm it in the parts flow.

Units without a connection run on intervals only.

8.9 The watch list in the field

The *watch list* holds units whose recorded maintenance history shows a trend toward trouble. Examples are a reading drifting toward its limit over several visits, the same item failing visit after visit, or maintenance long overdue. The watch list is based on recorded findings, not on live equipment data. A unit on the watch list shows **On the watch list** on its chart and on your route. You get an FYI notification when a unit is added. Your office works the watch list in the web console (“Work the watch list” on page 116).

9

CHAPTER 9

Service plans in the field

IN THIS CHAPTER

- Present a service plan 78
- Approvals waiting for a customer 79

A *service plan* is a maintenance agreement your shop offers its customers. Your office builds the plans in the web console. In the field, you present them with any add-ons the day's findings call for, and the customer approves on your device.

9.1 Present a service plan

At the end of a visit, the app can present your shop's service plans in the customer's view (Figure 9-1).

TECHNICIAN AND CUSTOMER · IPHONE OR IPAD

1. Open the plan offer for the site.
2. Check that **Customer view** is shown, so the screen shows only what the customer should see.
3. Walk the customer through the tiers.
4. Point out any add-on marked as raised by today's findings.
5. Tap the tier the customer chooses, and any add-on they accept.
6. Hand the device to the customer.
7. The customer taps the approve button, which names the tier and any add-on, and signs.

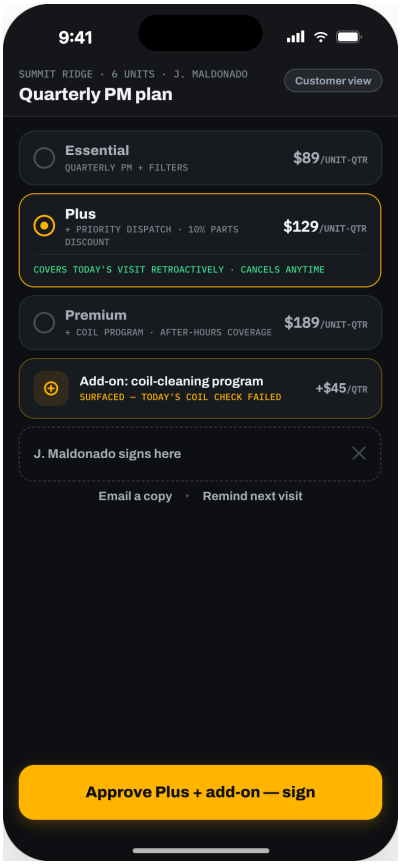


Figure 9-1 A service plan offer in the customer's view. Sample data.

RESULT

The plan is recorded as approved and attributed to you. A copy is emailed to the customer.

The tiers, prices, coverage and terms come from your shop's published catalog. When your office changes the catalog, the next offer you present shows the change. Add-ons appear when a finding calls for them, for example a coil-cleaning program when the coil check failed.

If the customer wants to think it over, tap **Email a copy** to send the offer, or **Remind next visit** to bring it up again. A building owner can also approve a plan later in the customer portal (Chapter 14). The approval then shows in your notifications.

9.2 Approvals waiting for a customer

When an approval, such as a plan or a quote, waits for a customer, it appears under **Needs you** in your notifications with the customer's name, and in the office's work queue. It clears when the customer approves or declines. Your office follows up on it from the console.

10 CHAPTER 10

Working offline

IN THIS CHAPTER

- What works offline 80
- Pack your day for offline work 81
- Manage offline storage 83
- Keep your regular appliances packed 84
- How your work syncs 85

Zylergy Field stores the day's units on the device, saves what you record there, and sends it when the connection returns.

10.1 What works offline

Table 10-1 Offline behavior in detail

TASK	OFFLINE	NOTES
Identifying and confirming a unit	Yes	The nameplate is read on the device.
Opening the unit chart	Yes, for units in your offline pack	Other units open when you are back online.
Manuals, schematics, parts catalogs	Yes, for packed units and your regular appliances	Shown as **Cached**.
Matching a part from a photo	Yes	Matching runs on the device for packed catalogs.
Building a cart and capturing approval	Yes	The order is sent when you are back online. An order not sent within 7 days expires.

Running a checklist	Yes	Findings are saved on the device.
Saving to the service log	Yes	Sent when you are back online.
Contributing a manual	Yes	Sent when you are back online.
The assistant	No	You can still open the manuals stored on the device.
Order status	Last known status	Marked with the time of the last sync.
Signing in	No	Work already on the device opens read-only.

10.2 Pack your day for offline work

Each night, over Wi-Fi, Zylergy Field downloads the records, site structure and parts catalogs for your day's units, and the parts your shop orders most often. Pack before you leave to download the manuals and schematics too. Pack again if your route changes (Figure 10-1).

TECHNICIAN · IPHONE OR IPAD · WI-FI

1. Tap **Menu**.
2. Tap **Offline & pack**.
3. Check that today's units are listed and turned on.
4. Tap **Pack now**.

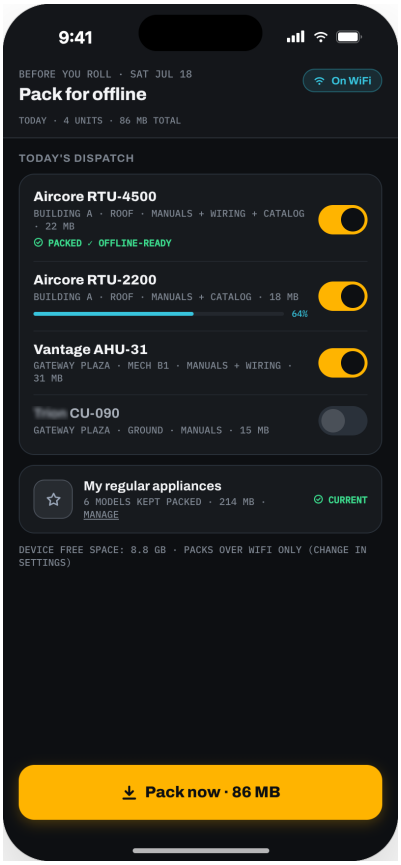


Figure 10-1 Pack for offline, with the day's units and their sizes. Sample data.

RESULT

Each unit shows **Packed** and **Offline-ready**, and the Home screen shows the time of the pack.

Each unit shows what will be packed and its size. The screen also shows the free space on the device. By default, packing runs over Wi-Fi only.

10.3 Manage offline storage

Offline storage shows what is on the device. You can free space there (Figure 10-2).

TECHNICIAN · IPHONE OR IPAD

1. Tap **Menu** > **Account, shop & role**.
2. Tap **Offline & storage**.
3. Read the groups: **Active jobs — locked**, **Recently closed — auto-clears** and **My regular appliances — manual only**.
4. To clear recently closed jobs now, tap **Select**.
5. Choose the jobs.
6. Tap **Free up space**.

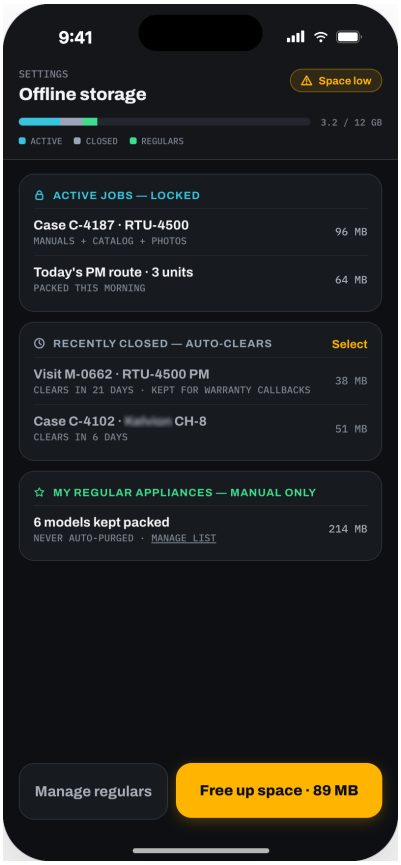


Figure 10-2 Offline storage on the device. Sample data.

RESULT

The selected data is removed from the device and the free space is updated.

Data for active jobs is locked and is not cleared automatically. Closed-job data is cleared from the device 30 days after the job closes, so a warranty return visit within that time still works offline. Your regular appliances are not cleared automatically.

10.4 Keep your regular appliances packed

You can keep the models you service often packed on the device, whatever your route (Figure 10-3).

TECHNICIAN · IPHONE OR IPAD · WI-FI TO DOWNLOAD

1. On **Pack for offline**, next to **My regular appliances**, tap **Manage**.
2. Tap **Add appliance**.
3. Search by make, model or type.
4. Choose the model.
5. Check that the model's toggle is on.

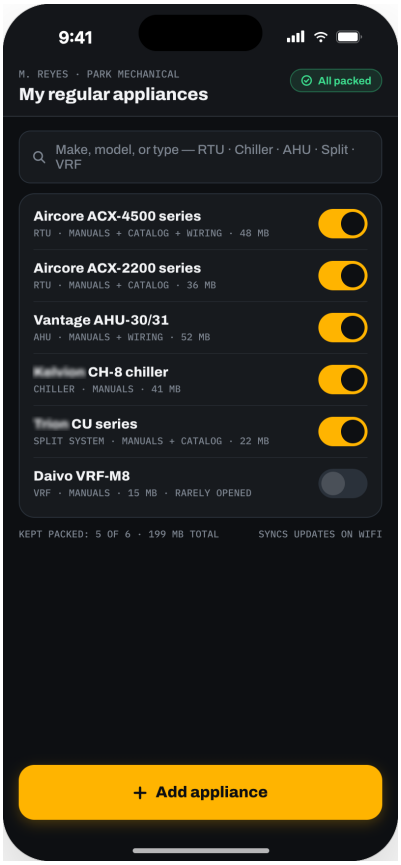


Figure 10-3 My regular appliances, with the models kept packed. Sample data.

RESULT

The model's manuals and catalog are packed and kept up to date over Wi-Fi.

Turn a model's toggle off to stop keeping it packed.

10.5 How your work syncs

When the connection returns, Zylergy Field sends what you recorded offline and fetches what changed:

- Completed checklists, service log entries and contributed manuals are sent in the order you recorded them.
- Queued orders are sent automatically. You get a notification if one fails or needs approval.
- Order status, notifications and the route are refreshed.
- The time of the last sync shows on the Home screen, the Menu and the orders board.

If a queued order is more than 7 days old, it expires and is not sent. Check the orders board after a long time without coverage.

11 CHAPTER 11

Working on iPad

IN THIS CHAPTER

- The iPad layout 86
- The cab briefing 87
- The unit chart on iPad 87
- Diagnose beside the cited page 88
- Run a checklist beside the schematic 89
- Find a part in context 90
- Read a manual page full size 91

On iPad, your work is on the left and the material you need is on the right. The cited manual page sits beside the diagnosis, the schematic beside the checklist, and the exploded view beside the cart. All tasks in this guide also work on iPad. The iPad screens are landscape, except the full-page manual reader.

11.1 The iPad layout

- **Left rail. Home**, **Scan**, **Orders** and **Menu** sit in a rail on the left instead of a bottom bar. **Scan** is at the top.
- **Work on the left, material on the right.** The task you are doing is on the left. The companion pane on the right shows the document, schematic, log or catalog the task refers to.
- **Citations in the companion pane.** Tap a citation to open the page in the companion pane. The task stays open on the left.
- **Portrait for reading.** Turn the iPad to portrait to read a manual page full size.

11.2 The cab briefing

The iPad Home screen is a briefing for the day (Figure 11-1).

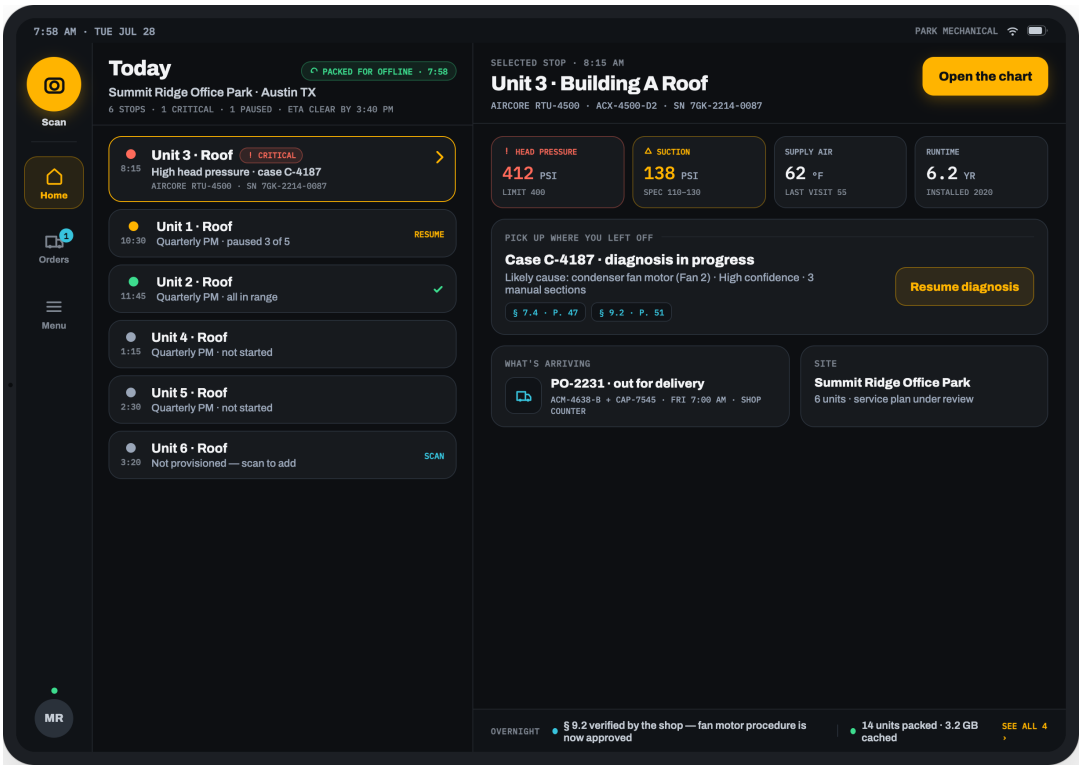


Figure 11-1 The cab briefing on iPad. Sample data.

The left side lists today's stops in order. It also shows a summary of stops, critical items and paused work, and whether the day is packed for offline. Tap a stop to see it on the right.

The right side shows the unit's recent readings against their limits, work to pick up (for example **Resume diagnosis**), what is arriving, and the site. Tap **Open the chart** to go to the unit. A stop for a unit your shop has not set up yet reads **Not provisioned — scan to add**.

11.3 The unit chart on iPad

The unit chart on iPad shows the unit and its service log side by side (Figure 11-2).

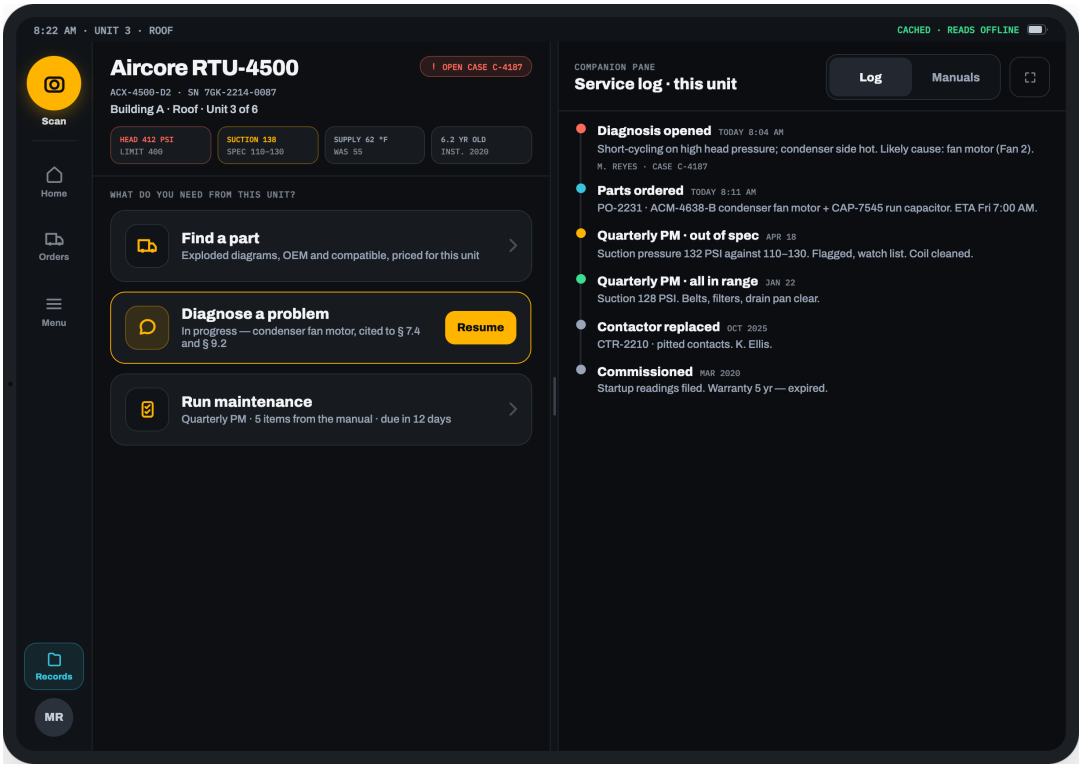


Figure 11-2 The unit chart on iPad, with the service log beside it. Sample data.

The left side shows the unit's identity and age, any open case, recent readings and the three actions **Find a part**, **Diagnose a problem** and **Run maintenance**. The companion pane has two tabs: **Log**, the unit's service log, and **Manuals**, its documents. Both work offline when cached. If the unit is recognized but not on your shop's roster, the chart says so, and the log pane offers to add the unit to the site.

11.4 Diagnose beside the cited page

On iPad, the conversation with the assistant is on the left and the cited page opens on the right (Figure 11-3).

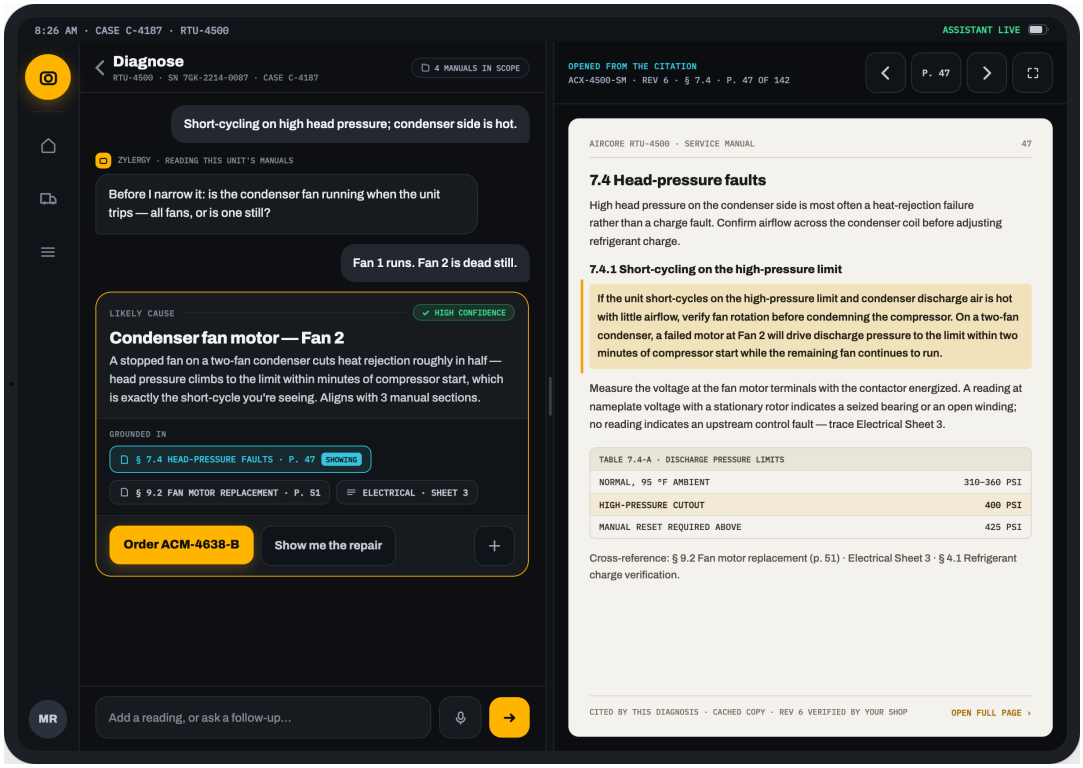


Figure 11-3 Diagnosis beside the cited page on iPad. Sample data.

The likely cause lists the sources it is based on. Tap a source chip to show that page on the right. From the likely cause you can order the part or ask to see the repair. Add a reading or a follow-up question in the box at the bottom, or use the microphone. **Open full page** opens the page in the full-page reader (“Read a manual page full size” on page 91).

When confidence is low, the screen shows two cause cards. Tap a card to show its page. When the documents do not cover the question, the pane says so and offers the closest section.

11.5 Run a checklist beside the schematic

On iPad, the checklist is on the left and the drawing the active item cites is on the right (Figure 11-4).

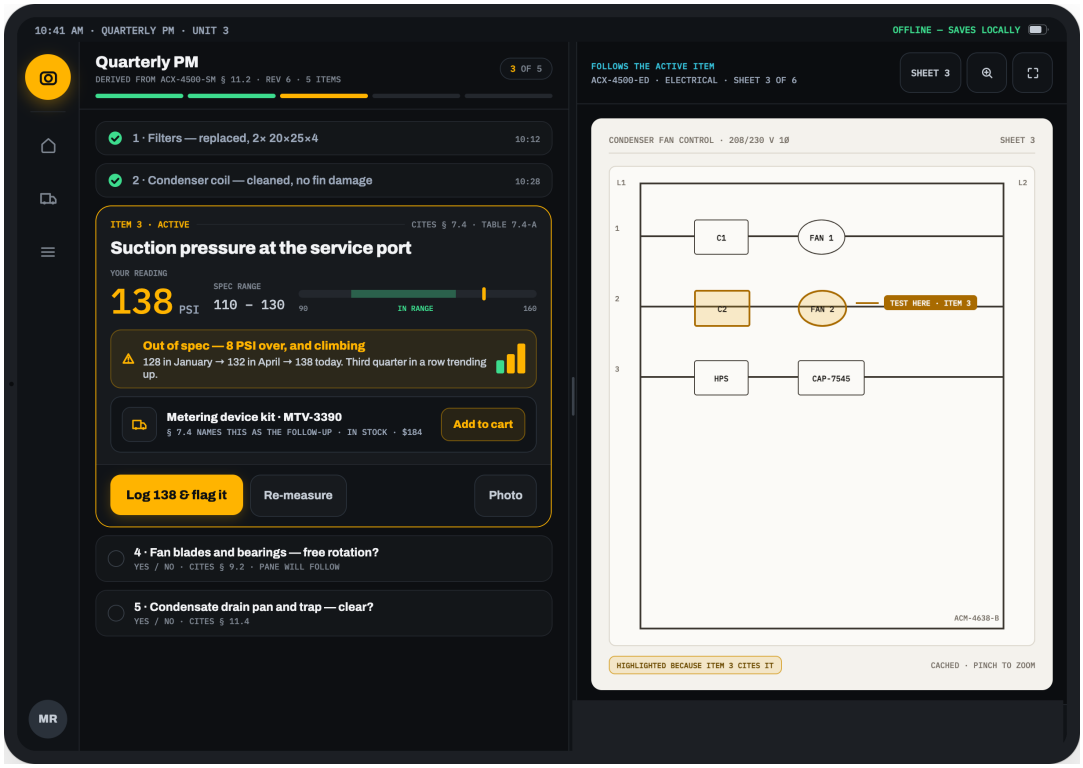


Figure 11-4 The checklist beside the cited schematic on iPad. Sample data.

As you move from item to item, the right pane follows the active item and highlights what it cites. Pinch to zoom. A reading shows its verdict and trend in the item. For an out-of-spec reading, you can log and flag it in one step, measure again, or add a photo. If the manual names a follow-up part, the item offers to add it to the cart. Without a signal, your work is saved on the device.

11.6 Find a part in context

On iPad, the exploded view is on the left and the selected part, its sources and the cart are on the right (Figure 11-5).

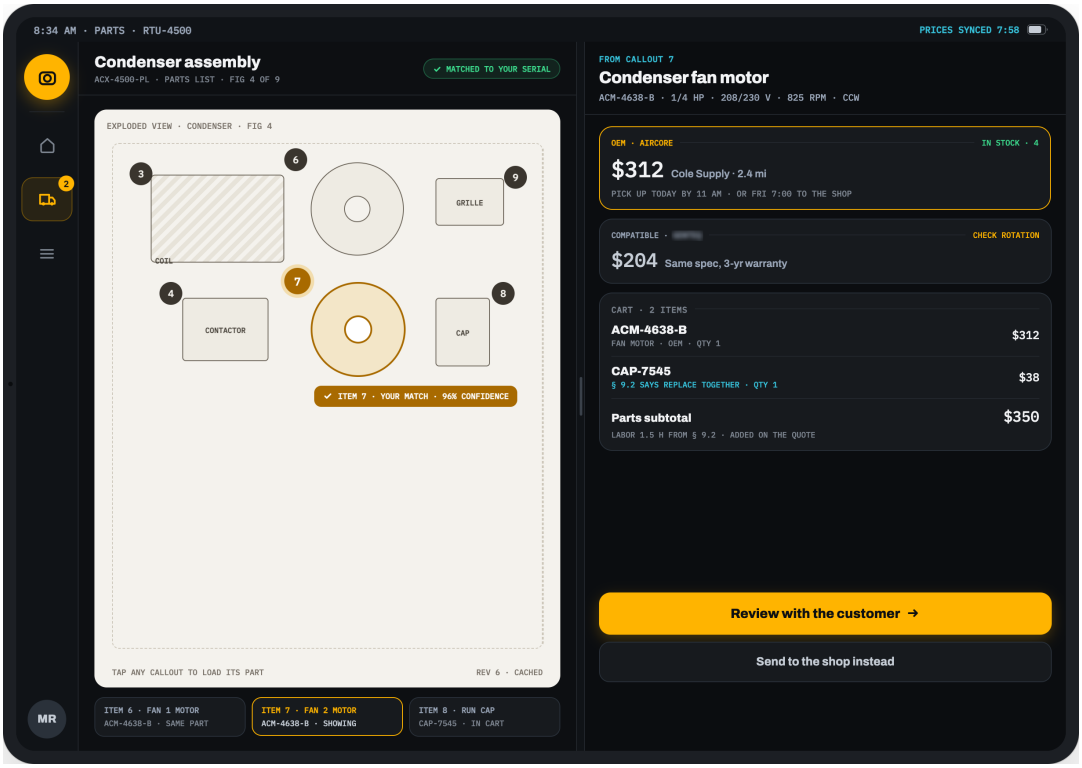


Figure 11-5 A part in context on iPad. Sample data.

Tap any callout to load its part. The part shows whether it is matched to the unit's serial number. It also shows the OEM and compatible options with price and stock, and parts the manual says to replace together. Labor time taken from the manual can be added to the quote. Tap **Review with the customer** to show the customer's approval screen. To leave the cart for your office, tap **Send to the shop instead**.

11.7 Read a manual page full size

Turn the iPad to portrait, or tap **Open full page**, to read a page full size (Figure 11-6).

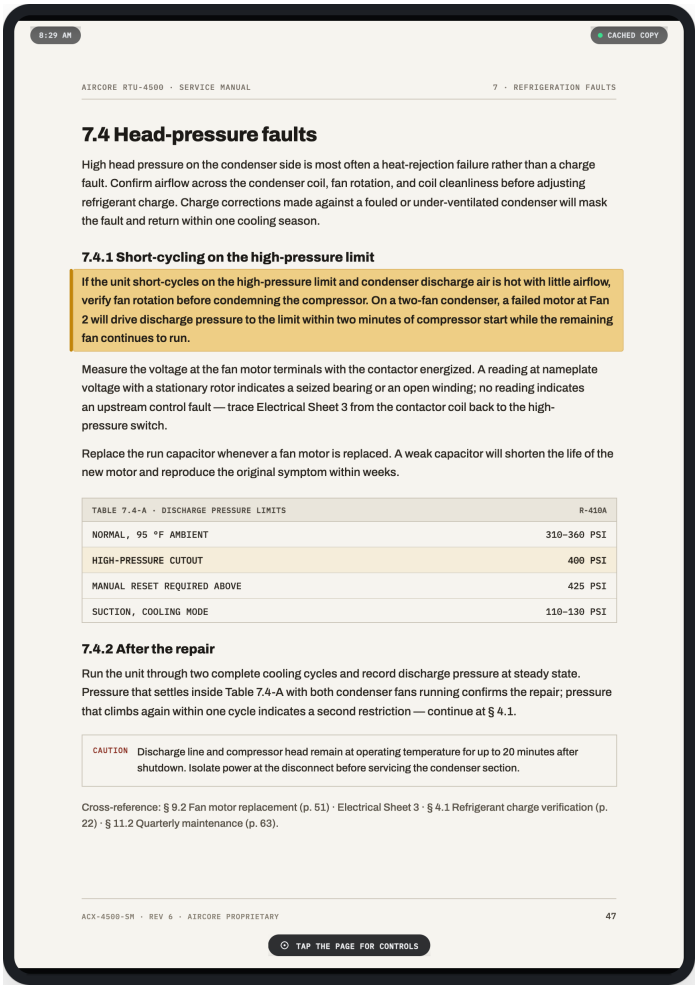


Figure 11-6 The full-page reader in portrait. Sample data.

TECHNICIAN · IPAD · WORKS OFFLINE FOR CACHED DOCUMENTS

1. Tap the page to show the controls (Figure 11-7).
2. To move through the document, use the page controls or tap **Next citation**.
3. To reflow the text, tap **Reader** (Figure 11-8). To see the printed layout again, tap **Page**.
4. To zoom in on a table or drawing, pinch the page (Figure 11-9).
5. Tap **Back to diagnosis**, or turn the iPad back to landscape.

RESULT

You are back in the split view where you left off.

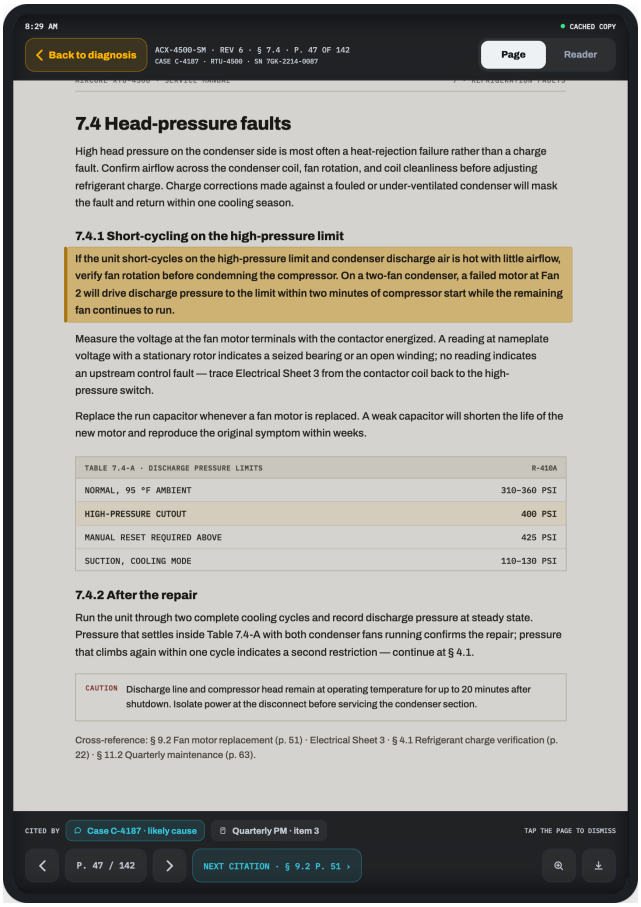


Figure 11-7 The reader with its controls shown. Sample data.

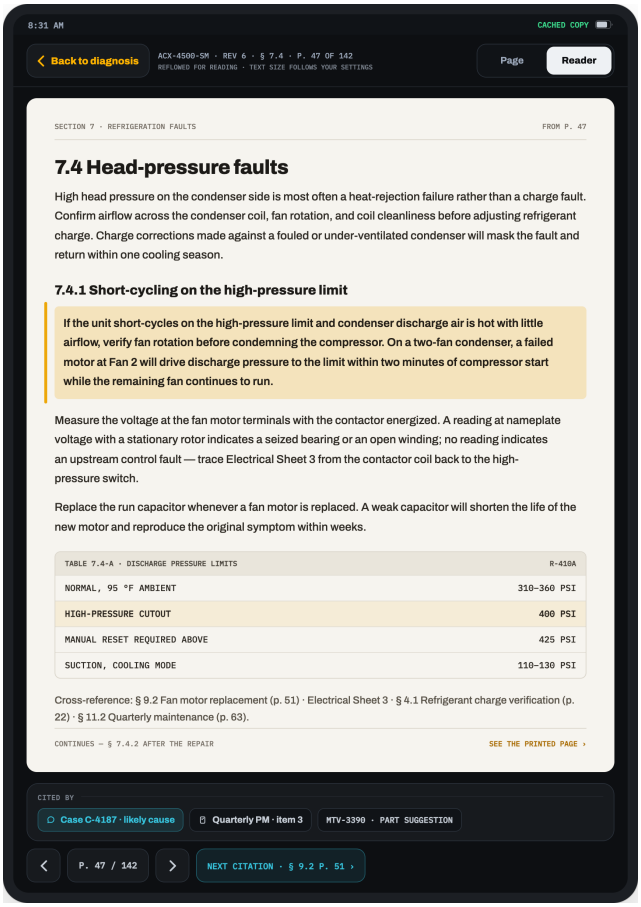


Figure 11-8 Reader mode, with the text reflowed. Sample data.

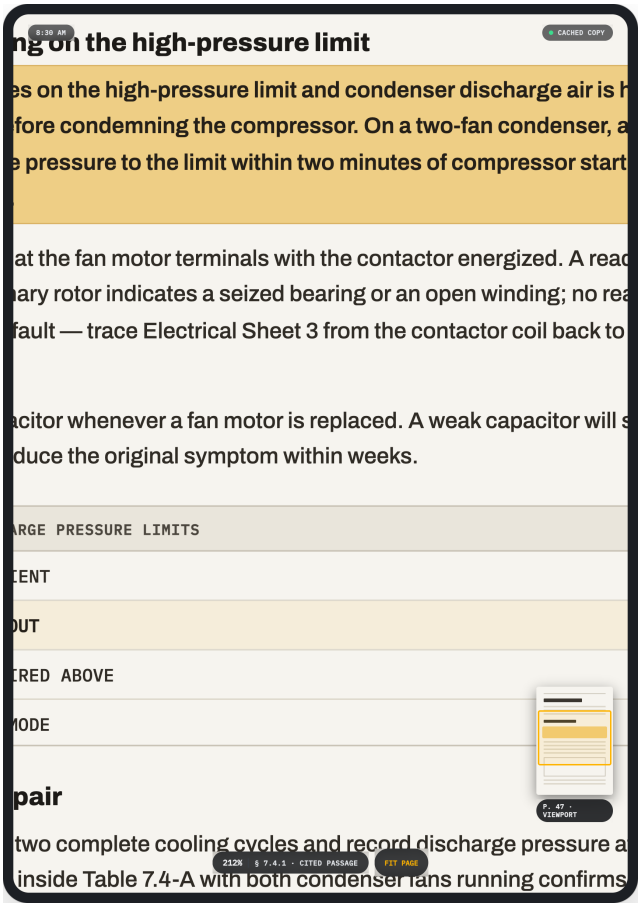


Figure 11-9 A zoomed table with the cited row highlighted. Sample data.

Cited by lists the places that cite the page, such as a diagnosis, a checklist item or a part suggestion. Tap one to go there. In Reader mode, text that continues beyond the cited passage has a link to the printed page. **Cached copy** means the page is available offline.

12 CHAPTER 12

Back-office work in the web console

IN THIS CHAPTER

- Sign in to the web console 96
- Where the console opens 98
- Find your way around 98
- Your items 99
- Search the console 100
- The unit page 101
- The order book 103
- Returns and credits 103
- Upload a manual 105
- My settings 106

Your office works in the web console. Technicians use it too, for tasks that need a desk, such as printing a return label. For the shop owner's dashboard, supervision and approvals, see Chapter 13.

12.1 Sign in to the web console

Sign in to the web console with the work email you use in the app (Figure 12-1). If you belong to more than one shop, you choose which one to work in.

ALL USERS · WEB CONSOLE

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 shop 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 are a member of more than one shop, select the shop under **Choose your shop**.
7. If you chose a shop, click **Continue**.

RESULT

The console opens on your landing page (Table 12-1). The browser remembers the shop you chose.

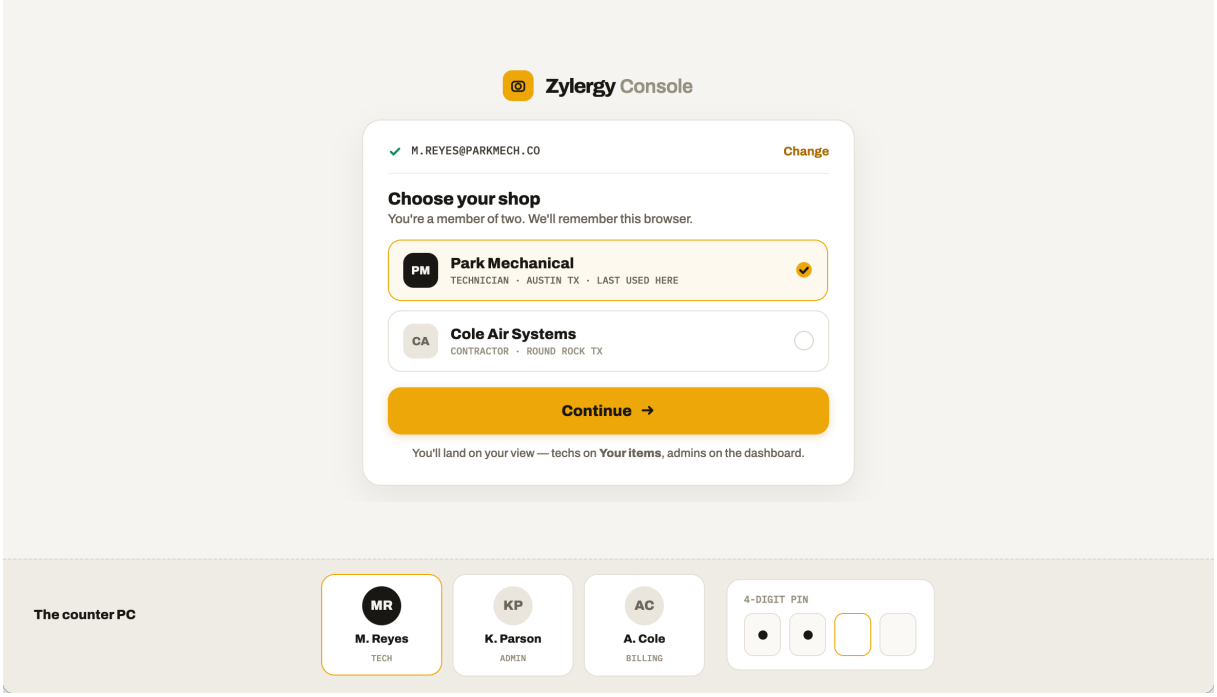


Figure 12-1 Choose your shop, with the shared terminal below. Sample data.

To use a different email address, click **Change**. After a period without activity, the console signs you out. When you sign in again, it shows "You were signed out — pick up where you left off." and returns you to where you were. You can also open the console from the app's account view without signing in again.

Use the shared terminal

Your shop can set up a desk computer, such as the one at the parts counter, as a shared terminal. Users switch with a tile and a 4-digit PIN instead of signing in with their email address (Figure 12-1).

ALL USERS · WEB CONSOLE ON THE SHARED TERMINAL

1. On the shared terminal, click your tile.
2. Enter your 4-digit PIN.
3. When you are done, click **Switch user**.

RESULT

The console opens on your landing page. For technicians this is **Your items**. **Switch user** returns the terminal to the tiles. The terminal also returns to the tiles when it is left idle.

Your administrator turns the shared terminal on for the shop and sets who appears on it. See the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01), chapter “Account and shop.”

12.2 Where the console opens

Where the console opens depends on your role (Table 12-1). You can change your own landing page in **My settings** (“My settings” on page 106).

Table 12-1 Where the console opens

ROLE	OPENS ON
Field tech	**Your items**: desk tasks the app sent ahead, such as a label to print
Back office and **Admin**	The console home (**Dashboard**): what needs attention today across the shop

12.3 Find your way around

You can reach a task from the task strip on the console home, from the sections across the top, or with search (⌘K).

Table 12-2 Console sections

SECTION	WHAT IT HOLDS	COVERED IN
Dashboard	The console home: tasks, what needs attention, activity across the shop, Your items	“The console home” on page 109
Orders	The order book, order history, returns and credits	“The order book” on page 103

Documents	The document library, uploads, the review queue and access rules	“Upload a manual” on page 105
Maintenance	Checklist templates, schedules and reminders, the maintenance dashboard and the watch list	“Plan visits and maintenance” on page 114
Service Plans	The service-plans builder	“Build and publish service plans” on page 118
Owner Portal	The customer portal as your customers see it	Chapter 14

The shop name at the top right switches between shops if you belong to more than one. Your avatar opens **My settings** and sign-out. The unit page is not in a section. All sections link to it.

12.4 Your items

Your items lists the desk tasks the app sent ahead (Figure 12-2). For example, when the app tells you to print a label at the console, the label is waiting here.

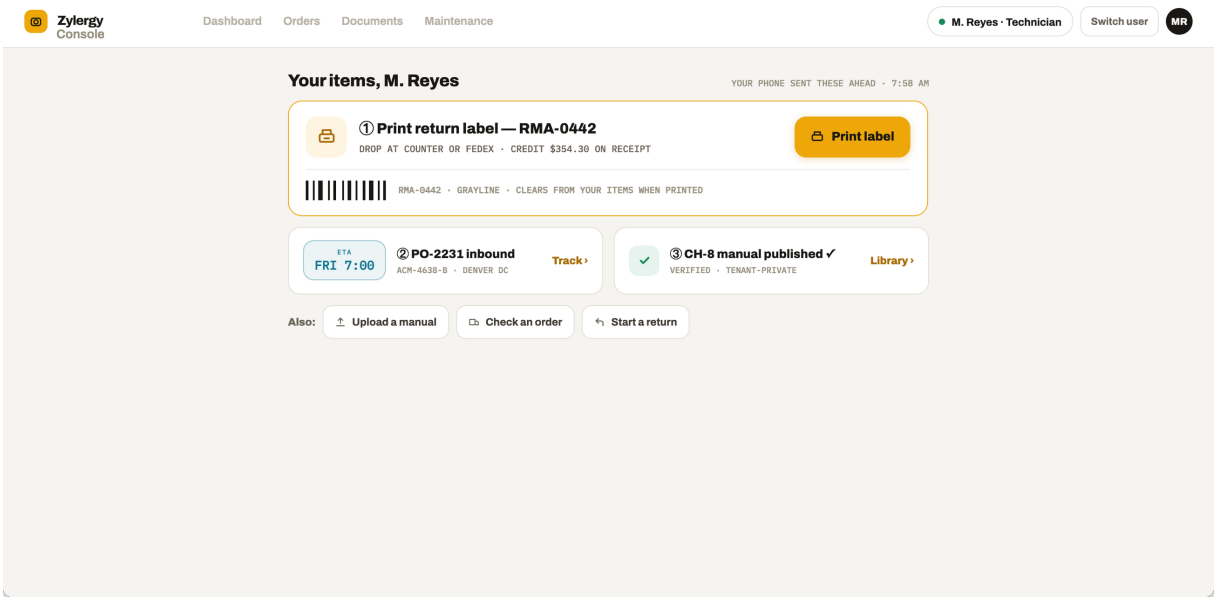


Figure 12-2 Your items in the web console. Sample data.

Each item has one action, such as **Print label**, **Track** or **Library**. The **Also** list below them offers **Upload a manual**, **Check an order** and **Start a return**. When there is nothing to do, the page says so. On a shared terminal, **Switch user** returns to the tiles.

Print a return label

TECHNICIAN OR OFFICE STAFF · WEB CONSOLE · NEEDS A PRINTER

BEFORE YOU BEGIN

- You reported a return with **Ship it back** in the app (“Choose how it goes back” on page 64).

1. Open **Your items**, or search for the RMA number with ⌘K.
2. On the return label item, click **Print label**.
3. Print the label on any printer.
4. Pack the part in the box.
5. Attach the label to the box.
6. Hand the box to the carrier.

RESULT

The item clears from Your items and shows a confirmation with the RMA barcode. The label is also emailed to the technician who reported the return.

12.5 Search the console

Press ⌘K anywhere in the console to search (Figure 12-3). You can type an ID, a unit, a customer or an action.

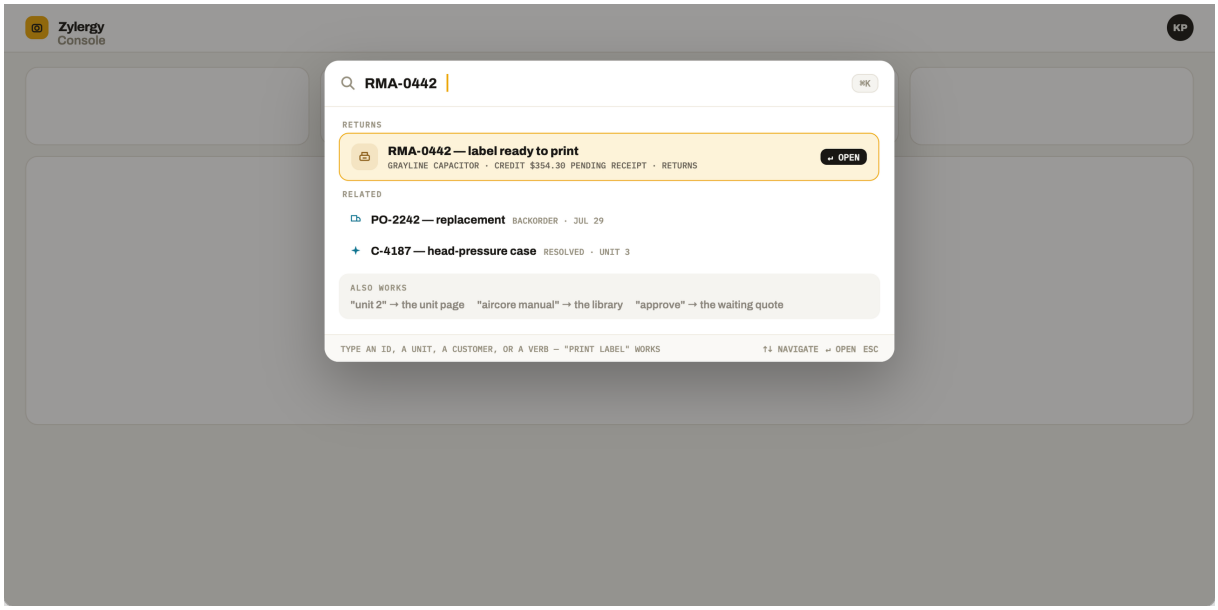


Figure 12-3 Console search for an RMA number. Sample data.

Table 12-3 What console search finds

YOU TYPE	YOU GET
An order, RMA, case or quote number	That record, with related records below it
A unit name or serial number	The unit page
A model and “manual”	The document library, filtered
An action, such as “approve” or “print label”	The waiting item you can act on

Use the arrow keys to move through the results, Return to open one, and Esc to close.

Table 12-4 Keyboard shortcuts

KEYS	ACTION
⌘K	Search for IDs, names or actions
G then Q	Go to the work queue
G then U	Jump to a unit by serial number
⌘P	Print the label in view
?	Show the shortcuts card from anywhere

12.6 The unit page

The *unit page* shows one unit in the console. It is the same record as the unit chart in the app (Figure 12-4).

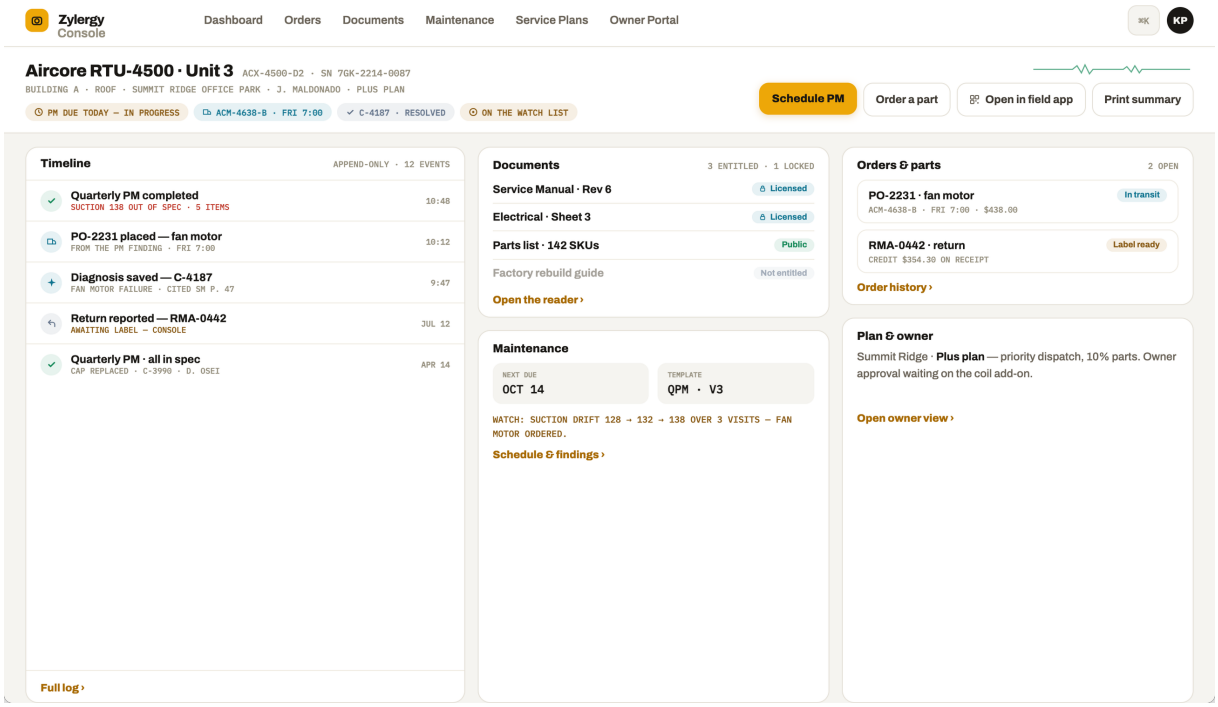


Figure 12-4 The unit page in the web console. Sample data.

Table 12-5 What is on the unit page

AREA	WHAT IT SHOWS AND DOES
Header	Make, model, unit name, serial number, location, customer and plan, with status chips such as maintenance due, a part on order, a resolved case, or **On the watch list**.
Actions	**Schedule PM**, **Order a part**, **Open in field app**, **Print summary**.
Timeline	The append-only service log, newest first. **Full log** opens all of it.
Documents	The unit's documents and their access levels. **Open the reader** opens them.
Orders & parts	Open orders and returns for the unit, and **Order history**.
Maintenance	Next due date, the checklist template version and any watch note, with **Schedule & findings**.
Plan & owner	The customer's service plan and any approval waiting. **Open owner view** shows what the customer sees in the customer portal.

For a connected unit, the unit page also shows its condition: recent operating values, anomaly flags, and the estimated failure risk and remaining useful life with the signals behind them.

12.7 The order book

The *order book* lists all open order lines in the shop. Each line shows the part and order, quantity and technician, job and customer, status and arrival (Figure 7-3).

OFFICE STAFF · WEB CONSOLE

1. Click **Orders**.
2. To filter, use **All techs**, **Customer**, **Type** and **Status**.
3. Click a line to open it.

RESULT

The line opens with its detail and, where needed, the reassign panel (see Chapter 7).

The order book shows when the supplier feed last synced. Order history can be filtered by technician, date range, customer and status. Each order shows why its lines went to their supplier: price, availability or your shop's sourcing policy. You can export each view to CSV.

12.8 Returns and credits

The returns console lists open returns with their status, and holds the label and the credit for each (Figure 12-5).

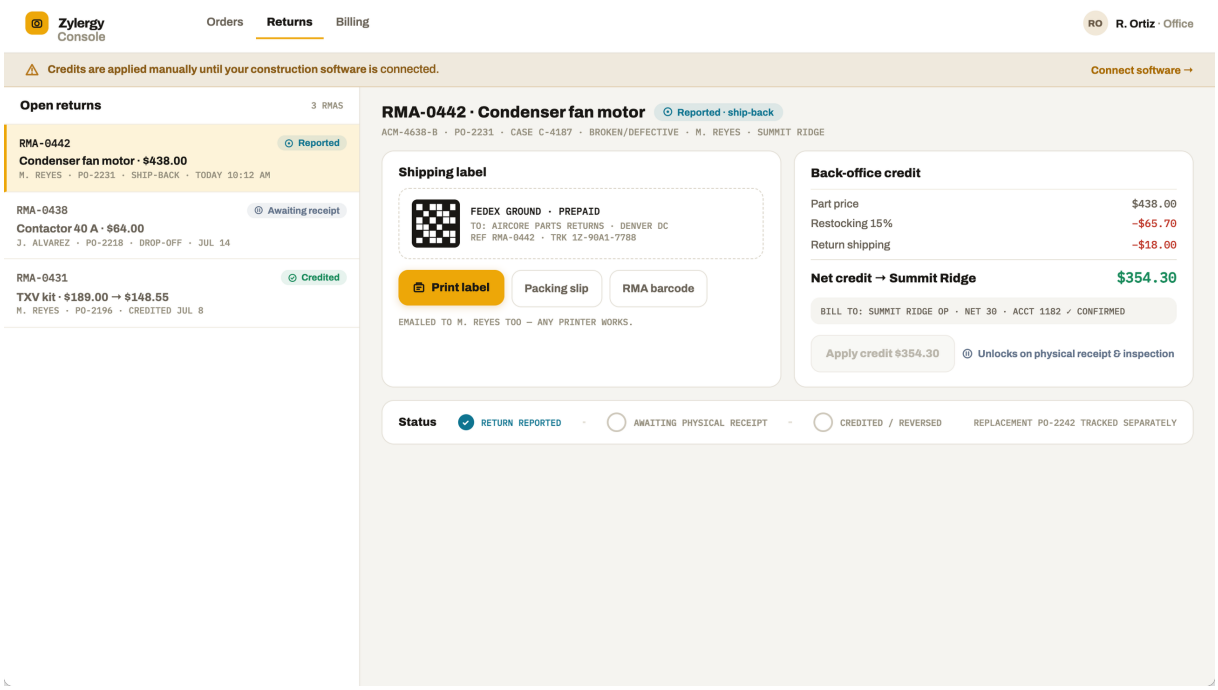


Figure 12-5 The returns console. Sample data.

OFFICE STAFF · WEB CONSOLE

1. Click **Orders**.
2. Open the returns list.
3. Click a return under **Open returns**.
4. To print shipping documents, click **Print label**, **Packing slip** or **RMA barcode**.
5. When the return shows that the part has been received and inspected, check the credit lines.
6. Click the apply credit button.

RESULT

The credit is applied and the return shows as credited.

The apply credit button stays unavailable until the supplier confirms that it received and inspected the part. The credit shows the part price, any restocking fee, return shipping, the net credit, and who it is billed to. If your shop's field-service system is connected, the credit is written to it.

The returns view can be filtered by technician, reason, date range and reconciliation status, and exported to CSV. Return analytics show returns by technician, reason, equipment, supplier and period.

12.9 Upload a manual

Anyone who works in the console can add a manual to the shop's library, for example one that shipped with a unit (Figure 12-6). Uploads go to review before they are published.

ALL USERS · WEB CONSOLE

1. Click **Upload a manual** on Your items, or click **Documents**.
2. If you are in **Documents**, click **Upload / attach**.
3. Drop the PDF or scan into the upload area.
4. Enter the equipment model, and the serial number if the manual is for one unit.
5. Choose the document type.
6. Enter where the document came from, and any licensing note.
7. Click **Submit to review**.

RESULT

The manual enters the review queue. You are notified when it is published, or rejected with a reason.

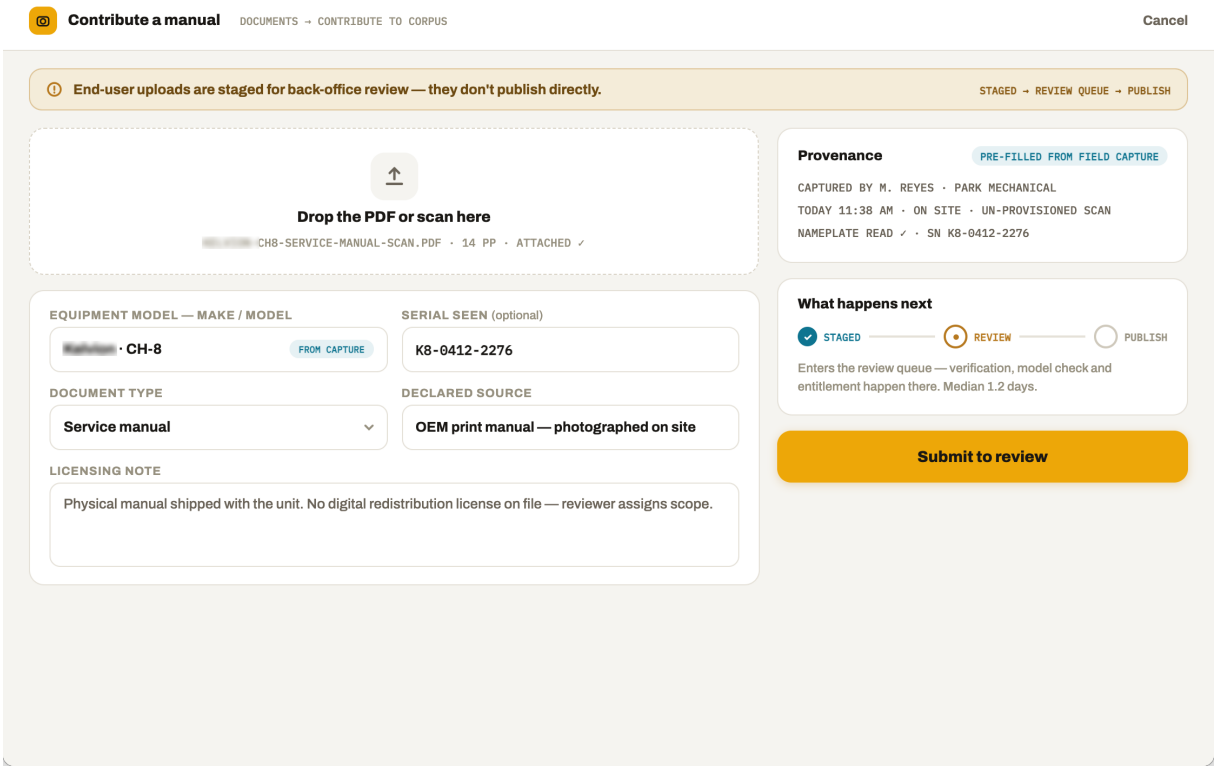


Figure 12-6 Contribute a manual. Sample data.

If a technician captured the manual in the field, the form is filled in from the capture. An administrator in your shop reviews each upload ("Review uploaded manuals" on page 112). Reviewed documents join the shared library, which only licensed and approved contractors can use. Zylergy handles copyright and licenses.

12.10 My settings

My settings holds your personal settings for the console (Figure 12-7). They affect only you. Shop-wide settings are in **Organization & access**, which your administrator manages.

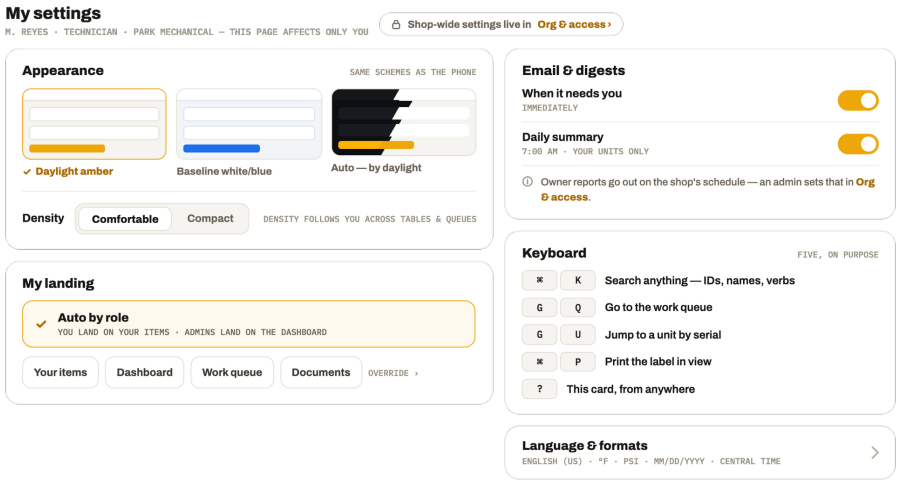


Figure 12-7 My settings in the web console. Sample data.

Table 12-6 Personal settings in the web console

SETTING	WHAT IT DOES
Appearance	**Daylight amber**, **Baseline white/blue** or **Auto — by daylight**. These match the schemes in the app.
Density	**Comfortable** or **Compact** rows in tables and queues.
My landing	**Auto by role** opens the page for your role (Table 12-1). You can also choose **Your items**, **Dashboard**, **Work queue** or **Documents**.
Default approval view	For people who approve: which approvals the queue shows first, such as **Needs review**, **Everything** or your shop only.
Email & digests	**When it needs you** sends email right away. **Daily summary** sends a summary for your units at a time you choose. Reports for building owners go out on the shop's schedule.
Keyboard	The keyboard shortcuts (Table 12-4).

Language & formats	Language, temperature, pressure, date format and time zone.

13 CHAPTER 13

Running the shop

IN THIS CHAPTER

- The console home 109
- The work queue 110
- Approve orders and quotes 112
- Review uploaded manuals 112
- Plan visits and maintenance 114
- The maintenance dashboard 115
- Work the watch list 116
- Build and publish service plans 118
- The shop owner's dashboard 119
- Spend, orders and returns 121
- Replacement opportunities and leads 121
- Reports for building owners 121

The shop owner runs the shop from the web console with the **Back office** role. In a larger shop, office staff with the same role take on parts of the work. Table 13-1 lists the tasks and where to find them. Reviewing uploaded manuals is an **Admin** task, which the shop owner or office staff do if they also hold **Admin**.

Table 13-1 Back-office work and where it is done

TASK	WHERE	SECTION IN THIS CHAPTER
See what needs attention today	Console home	The console home
Approve quotes and orders, resolve exceptions, assign reviews	Work queue	"The work queue" and "Approve orders and quotes"
Review manuals uploaded to the shop's library (**Admin**)	**Documents**	Review uploaded manuals

Plan visits and maintenance	**Maintenance**	Plan visits and maintenance
Supervise maintenance and the watch list	**Maintenance**	“The maintenance dashboard” and “Work the watch list”
Build and publish service plans	**Service Plans**	Build and publish service plans
Read the shop’s numbers	**Portfolio overview**	The shop owner’s dashboard
Review spend, orders and returns	**Orders**	Spend, orders and returns
Follow up replacement opportunities	Leads	Replacement opportunities and leads
Send reports to building owners	Reports	Reports for building owners

The administrator handles technical setup, such as users and roles, entitlements, integrations and security. See the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01).

13.1 The console home

The console home shows what needs attention today (Figure 13-1).

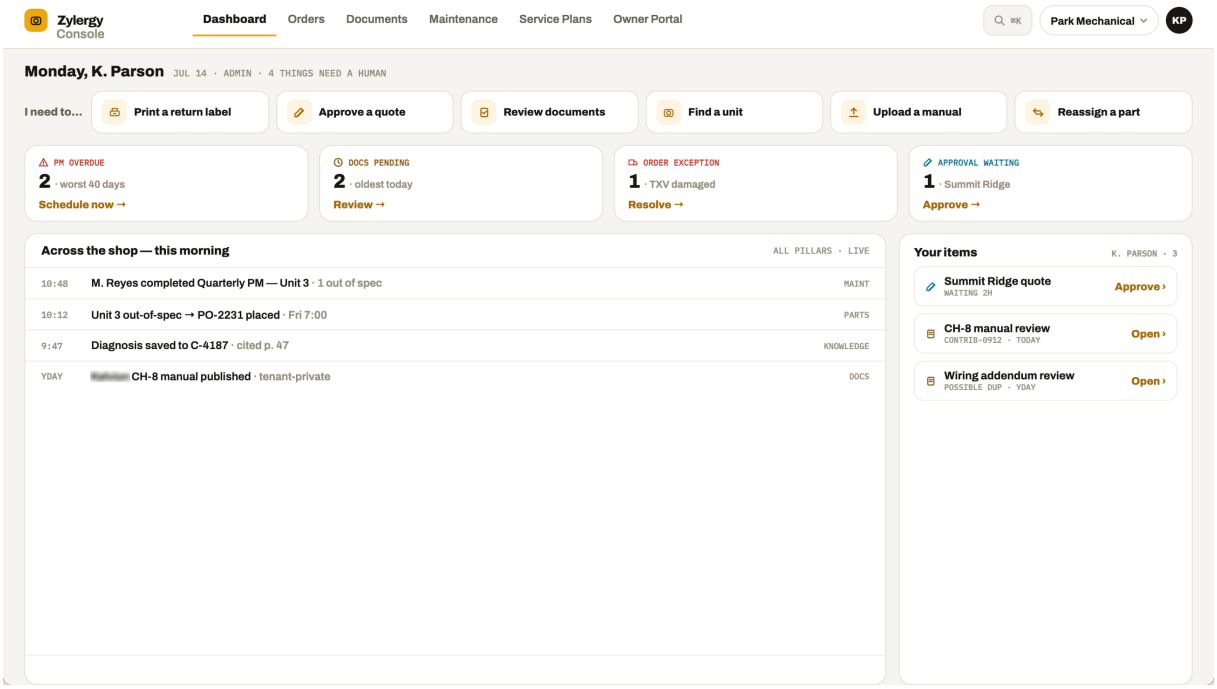


Figure 13-1 The console home. Sample data.

Table 13-2 What is on the console home

AREA	WHAT IT SHOWS AND DOES
Greeting	The date, your role, and how many items need attention.
I need to…	The task strip: **Print a return label**, **Approve a quote**, **Review documents**, **Find a unit**, **Upload a manual**, **Reassign a part**. Click a task to go straight to it.
Attention tiles	**PM overdue** (**Schedule now**), **Docs pending** (**Review**), **Order exception** (**Resolve**), **Approval waiting** (**Approve**), each with a count and the oldest item. When nothing needs attention, the tiles turn green and the task strip is shown first.
Across the shop — this morning	Activity from the field as it happens, tagged by area: maintenance, parts, knowledge, documents.
Your items	Your own desk tasks (“Your items” on page 99).

13.2 The work queue

The *work queue* lists the items that need someone in the office: approvals, document reviews, order exceptions and overdue maintenance (Figure 13-2). Items that need you come first, with the oldest at the top. You can act on most items without opening them.

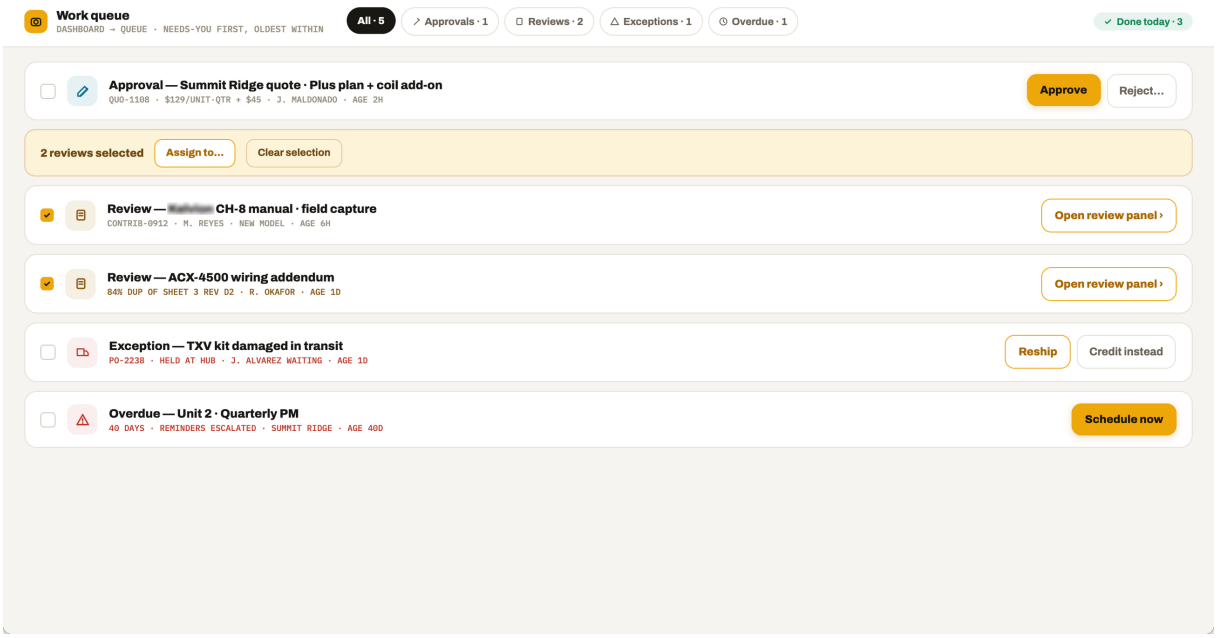


Figure 13-2 The work queue. Sample data.

SHOP OWNER OR OFFICE STAFF · WEB CONSOLE

1. Click the attention tile on the console home, or press G then Q.
2. To filter, click **All**, **Approvals**, **Reviews**, **Exceptions** or **Overdue**. To see what was cleared, click **Done today**.
3. Click the action on the item's row:
   a. For an approval, click **Approve** or **Reject…**.
   b. For a review, click **Open review panel** to review it yourself ("Review uploaded manuals" on page 112).
   c. For an order exception, click **Reship** or **Credit instead**.
   d. For overdue maintenance, click **Schedule now**.
4. If you rejected an approval, enter the reason.
5. To give several reviews to a reviewer, select them.
6. Click **Assign to…**.
7. Choose the reviewer.

RESULT

The item leaves the queue and appears under **Done today**. When nothing is left, the queue reads "Queue clear."

13.3 Approve orders and quotes

Some orders need approval before they are placed (“Orders that need approval” on page 55). Some quotes and plans wait for a customer. The approver gets a notification with the detail, and the approval appears in the work queue.

APPROVER ASSIGNED BY YOUR SHOP · IPHONE, IPAD OR WEB CONSOLE

1. Open the approval from the notification, or from **Approvals** in the work queue.
2. Check the lines, the technician, the job and the total.
3. Approve the order, or reject it.
4. If you reject it, enter a comment that tells the technician what to do instead.

RESULT

An approved order is placed immediately. A rejected order is not placed, and the technician gets your comment. The decision is recorded with the time and your name.

If you do not act within four business hours, the request goes to the backup approver. Your office sets the shop’s approval thresholds and approvers, as described in the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01), chapter “Purchasing setup.”

13.4 Review uploaded manuals

Manuals that technicians capture in the field and manuals the office uploads go to the review queue before anyone can use them (Figure 13-3). Reviewing uploads to your shop’s library is an **Admin** task. The shop owner or office staff do it if they hold the **Admin** role. Zylergy verifies documents before they are shared beyond your shop or published under a manufacturer’s license.

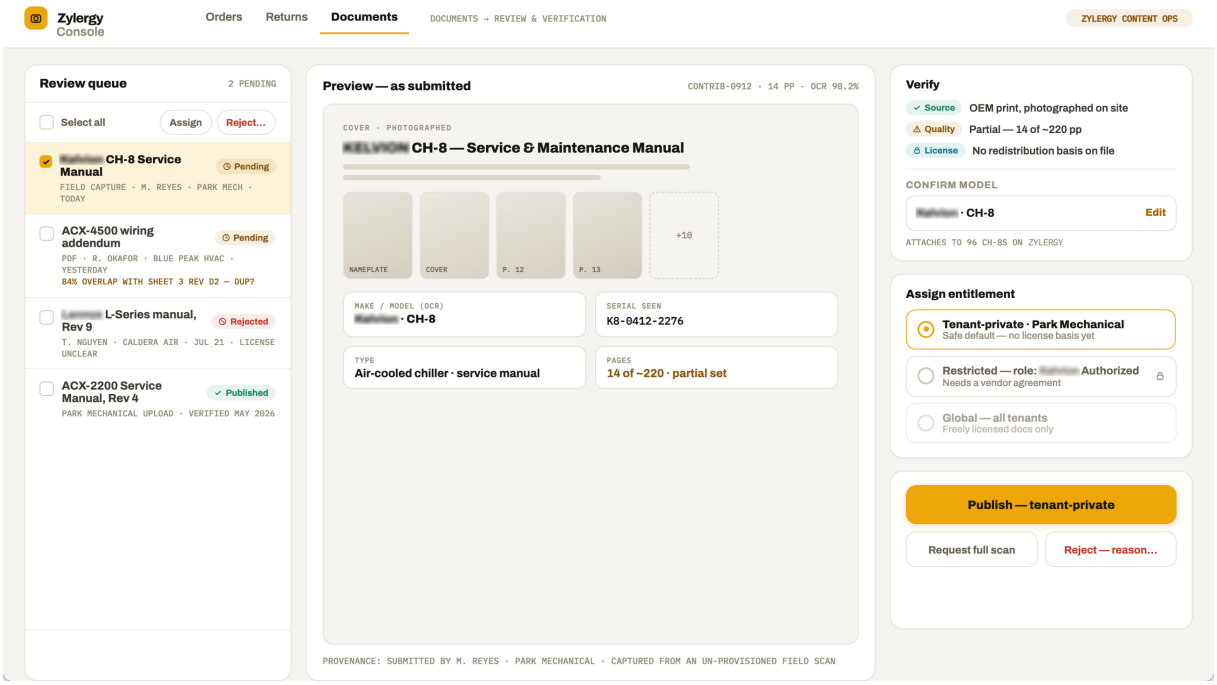


Figure 13-3 The review queue, with a field capture. Sample data.

ADMINISTRATOR (SHOP OWNER OR OFFICE STAFF WITH ADMIN) · WEB CONSOLE

1. On the console home, click **Review** on the **Docs pending** tile. The review queue opens. You can also open it from **Documents**.
2. Click a submission marked **Pending**.
3. Check the preview, the model and serial number read from the capture, and the page count.
4. Under **Verify**, check the source, the quality and the license basis.
5. Under **Confirm model**, correct the model if needed.
6. Under **Assign entitlement**, keep **Tenant-private** unless a license basis exists.
7. Choose the decision:
   a. To publish, click **Publish — tenant-private**.
   b. If pages are missing, click **Request full scan**.
   c. To reject, click **Reject — reason…**.
8. If you rejected the submission, enter the reason.

RESULT

A published manual becomes available to your shop, subject to its entitlement. A rejection notifies the submitter with the reason.

The queue warns you when a submission overlaps a document already in the library, so that you can reject duplicates. To publish a manual restricted to a manufacturer's entitlement role, your

shop needs a vendor agreement. Zylergy completes that verification. Decisions are recorded with the reviewer and the time.

13.5 Plan visits and maintenance

Each unit's maintenance schedule comes from its model's published checklist and the unit's in-service date. The schedule page for a site lists each unit's checklist, when it was last done, when it is next due, and its status (Figure 13-4).

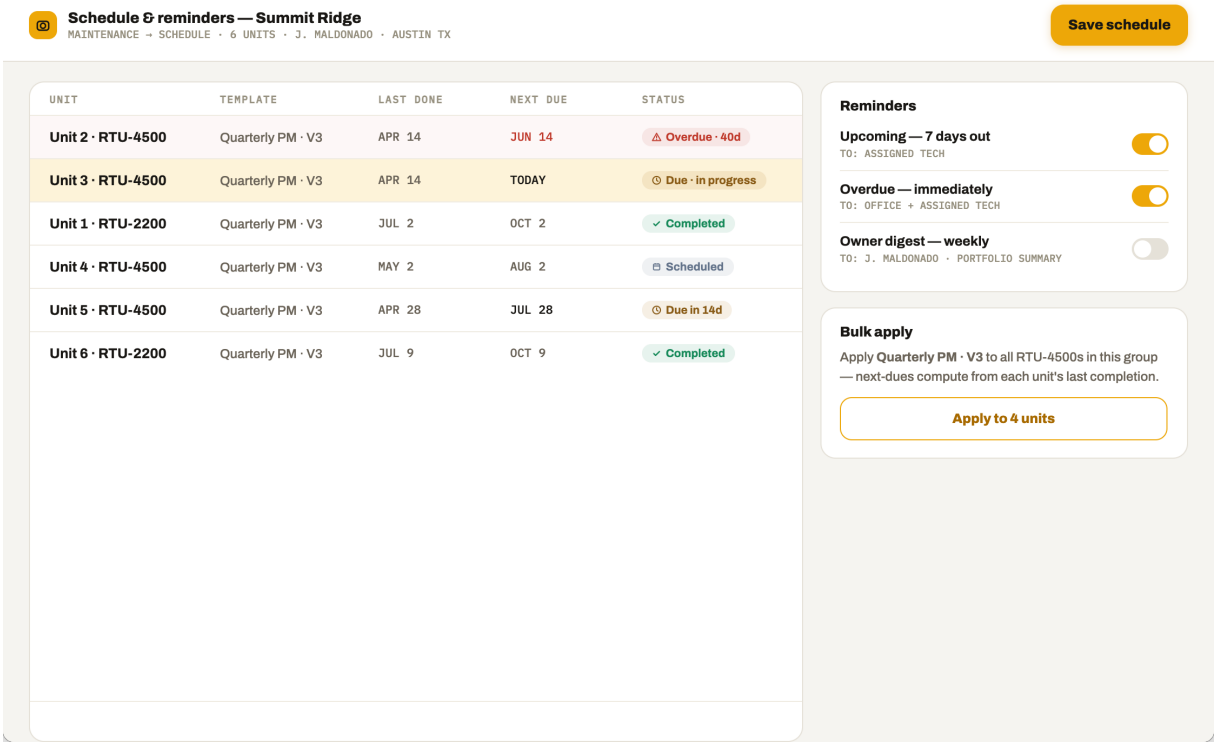


Figure 13-4 Schedule and reminders for a site. Sample data.

SHOP OWNER OR OFFICE STAFF · WEB CONSOLE

1. Click **Maintenance**.
2. Open the schedule for the site.
3. Read the list. Overdue units are listed first.
4. To schedule maintenance for a unit, click the unit.
5. Set the date.
6. To bring maintenance forward, defer it, skip it with a reason or change its interval, edit the unit's schedule.
7. Click **Save schedule**.

RESULT

The schedule is saved. Each change is recorded with its reason, your name and the time, as part of the maintenance audit trail.

You can also schedule maintenance from the unit page with **Schedule PM**.

Table 13-3 Schedule statuses

STATUS	MEANING
Overdue	Past its due date and not completed.
Due · in progress	Due, and a technician has started the checklist.
Due in a number of days	Coming due.
Scheduled	Planned for a date.
Completed	Done for this interval.

Reminders go to the assigned technician before maintenance comes due and to the office and technician when it is overdue. **Owner digest** is a weekly summary for the building owner (your customer). It can be turned on for the site.

To apply a checklist template to several units of the same model at once, use **Bulk apply**. Next due dates are calculated from each unit's last completion. To set intervals and reminders, see the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01), chapter "Maintenance setup."

For connected units, condition-triggered maintenance appears in these lists too. It is ranked with interval maintenance by estimated risk ("Condition-based maintenance" on page 76).

13.6 The maintenance dashboard

The maintenance dashboard shows the maintenance status of the units at a site, in a group or across the shop (Figure 13-5).

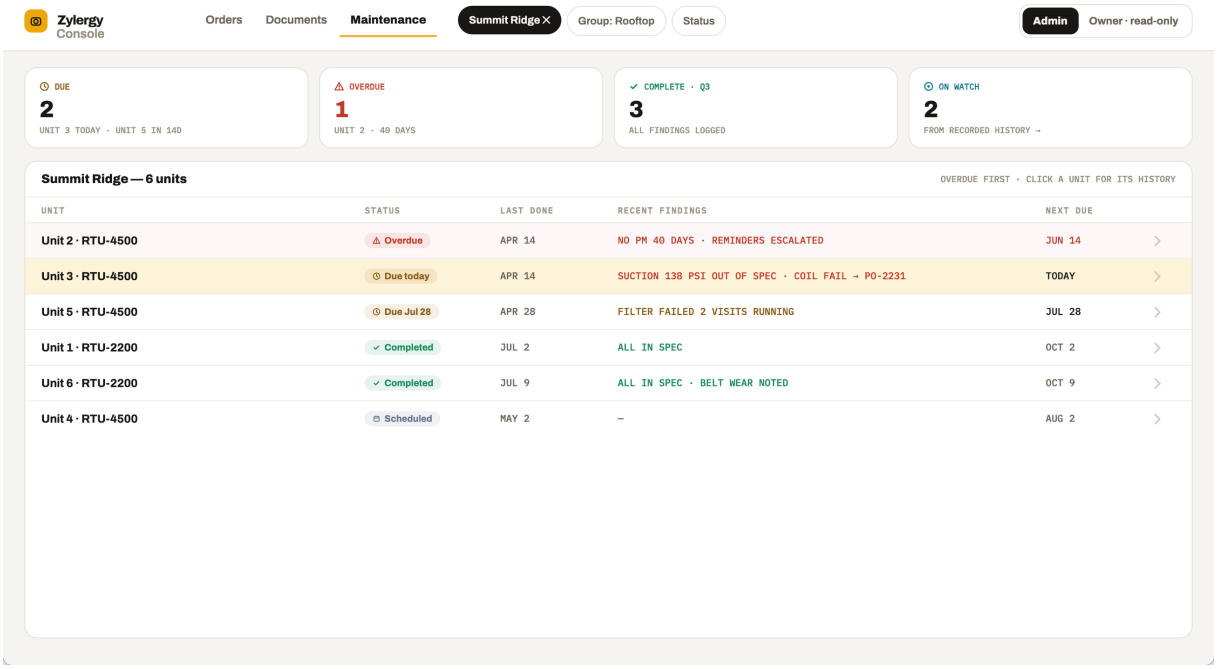


Figure 13-5 The maintenance dashboard for a site. Sample data.

The tiles count what is **Due**, **Overdue**, **Complete** and **On watch**. The list shows each unit's status, when it was last done, its recent findings and when it is next due, with overdue units first. Filter by site, group (for example rooftop units) and status. Click a unit to open its history. The view switch shows the dashboard as a customer sees it: read-only, with status, last done and next due.

Technicians see only their assigned work. For connected units, the dashboard adds condition and risk: anomalies, estimated failure risk, remaining useful life and planned replacement, rolled up per unit, site and customer.

13.7 Work the watch list

The watch list collects units whose recorded maintenance history shows a trend toward trouble (Figure 13-6). Each flag shows the rule that raised it and the history behind it.

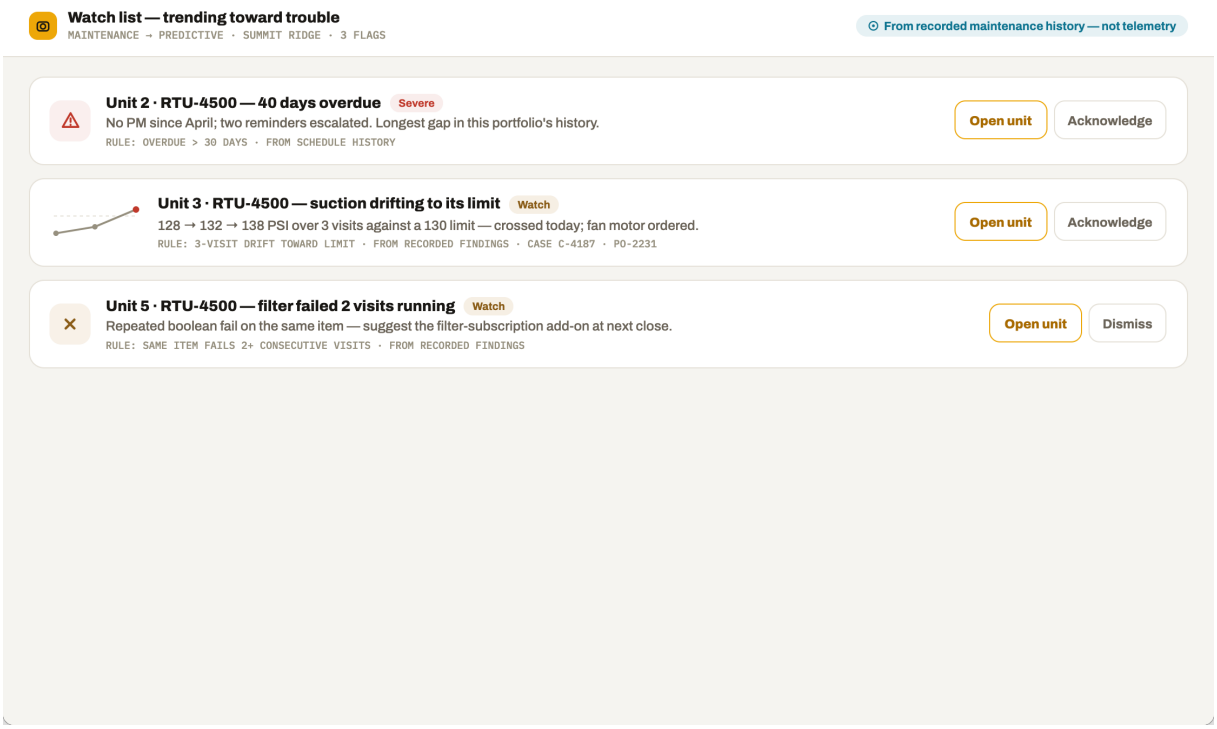


Figure 13-6 The watch list, with three flags. Sample data.

SHOP OWNER OR OFFICE STAFF · WEB CONSOLE

1. Click **Maintenance**.
2. Open the watch list.
3. Read each flag: the unit, what is trending, the rule, and the history.
4. To look closer, click **Open unit**.
5. Close the flag:
   a. When the flag is handled, for example a part ordered or a visit scheduled, click **Acknowledge**.
   b. If the flag needs no action, click **Dismiss**.

RESULT

The flag goes quiet for a period, and the list moves on to the next unit. Flags are ordered by severity: **Severe**, then **Watch**.

Table 13-4 Watch-list rules

RULE	RAISES A FLAG WHEN
Overdue	Maintenance is overdue by more than a set number of days.
Drift toward a limit	A reading moves toward its limit over successive visits.

Repeated failure	The same item fails on consecutive visits.

Your office sets the rule thresholds per model or for the whole shop. The watch list is built from recorded findings only, without live equipment data.

13.8 Build and publish service plans

The service-plans builder holds the plans your technicians present at the end of a visit (Figure 13-7). Technicians do not see a draft until you publish it. Each published change is versioned.

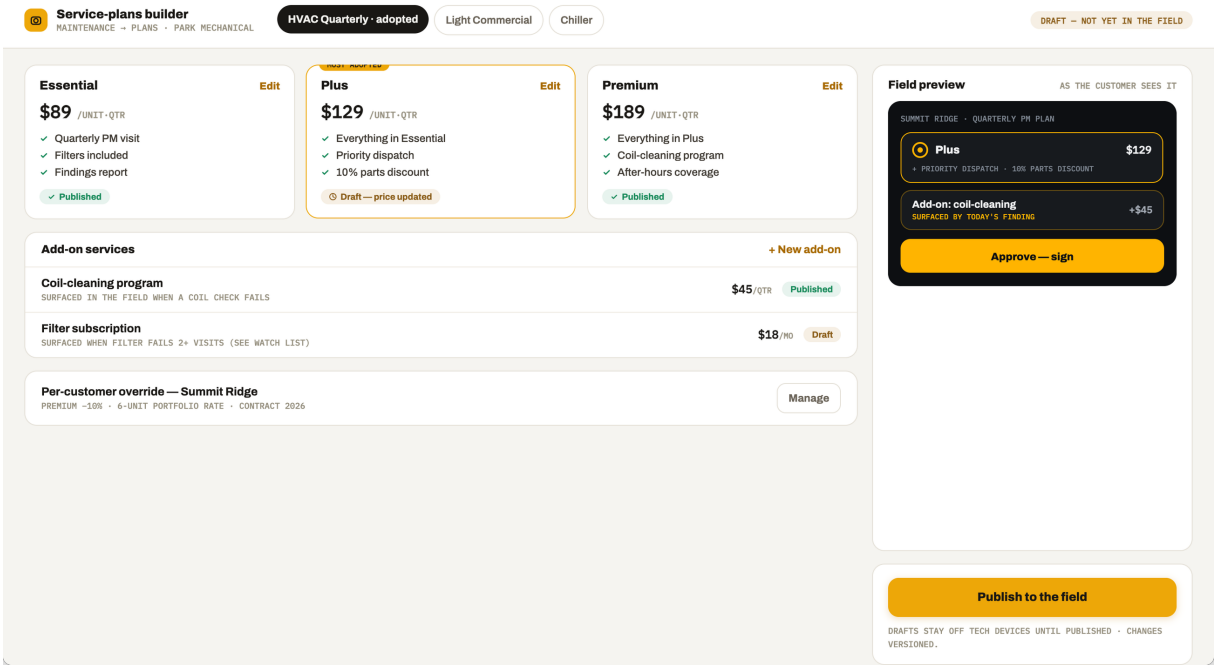


Figure 13-7 The service-plans builder. Sample data.

SHOP OWNER OR OFFICE STAFF · WEB CONSOLE

1. Click **Service Plans**.
2. Choose the segment tab, for example a light commercial or chiller catalog.
3. To change a tier, click **Edit** on it.
4. Set the tier's coverage, terms and price.
5. To give one customer different terms, click **Manage** under **Per-customer override**.
6. Check the **Field preview**, which shows the offer as the customer sees it.
7. Click **Publish to the field**.

RESULT

The plans are published. The next offer a technician presents uses them.

Add an add-on service

SHOP OWNER OR OFFICE STAFF · WEB CONSOLE

1. On **Service Plans**, click **+ New add-on**.
2. Describe the add-on service.
3. Set its price.
4. Set the finding that brings the add-on up in the field, such as a failed coil check.
5. Click **Publish to the field**.

RESULT

The add-on is published, and technicians see it offered when the finding occurs.

You can start from a template and adjust it. You can also describe the offer you want in plain words. Zylergy Field then drafts the tiers, coverage, terms and pricing for you to review and adjust before you publish. A draft can draw on the opportunities Zylergy Field sees in your customers' units.

13.9 The shop owner's dashboard

The shop owner's dashboard, **Portfolio overview**, shows how the shop is doing across its customers' sites (Figure 13-8).

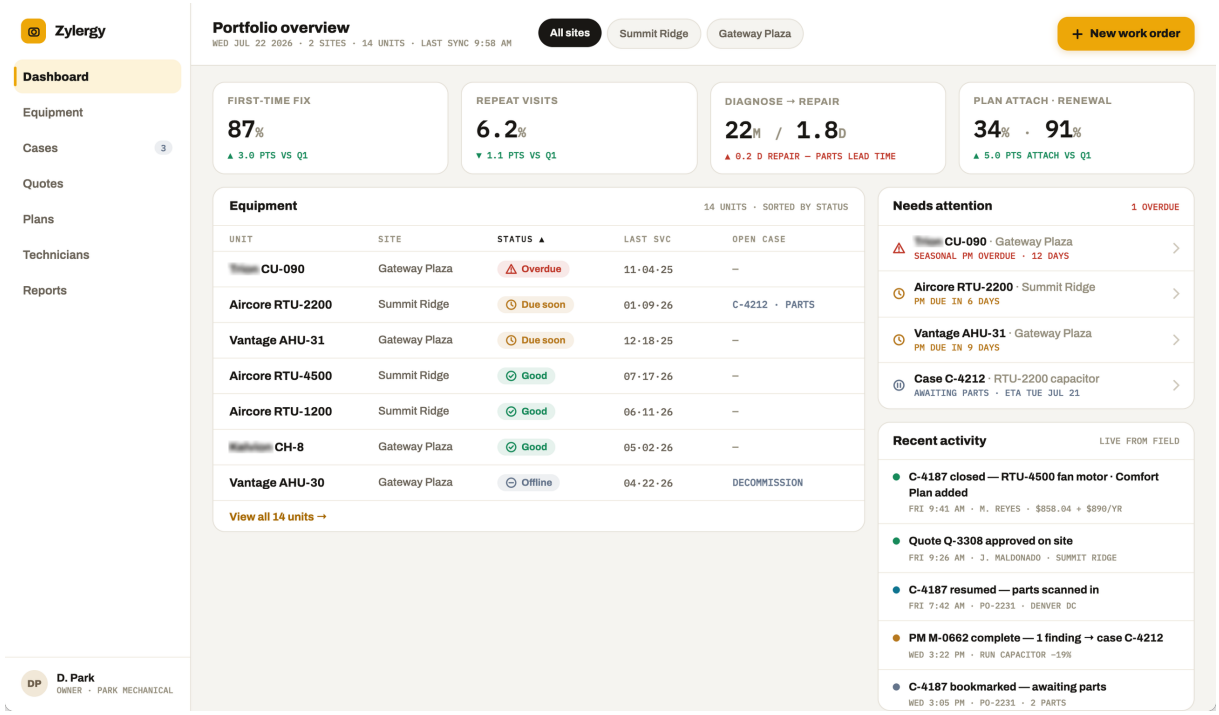


Figure 13-8 The shop owner's dashboard. Sample data.

Table 13-5 What is on the shop owner's dashboard

AREA	WHAT IT SHOWS
Site chips	**All sites**, or one customer site at a time.
Shop figures	First-time fix, repeat visits, time from diagnosis to repair, and service-plan attach and renewal, each with its change against the previous period.
Equipment	The units, each with its site, status, last service and open case, sorted by status.
Needs attention	Overdue maintenance, maintenance coming due, and cases waiting for parts.
Recent activity	Events from the field as they happen: cases closed, quotes approved, parts arrived, maintenance completed.
Navigation	**Dashboard**, **Equipment**, **Cases**, **Quotes**, **Plans**, **Technicians**, **Reports**.

For connected units, the shop owner's dashboard rolls up condition and risk across the portfolio: anomalies, estimated failure risk, remaining useful life and planned replacement, with the units at most risk first.

13.10 Spend, orders and returns

In **Orders**, your office can report on spend and follow orders and returns:

- **Spend reports**: by technician, by month, by equipment and by part category.
- **Order history**: filtered by technician, date range, customer and status, with the reason each line went to its supplier.
- **Returns**: filtered by technician, reason, date range and reconciliation status, with return analytics by technician, reason, equipment, supplier and period.

You can export each view to CSV.

13.11 Replacement opportunities and leads

Zylergy Field creates leads for your sales staff from two patterns:

- **Repeat repairs.** When a unit has needed the same repair more often than your shop's threshold for its equipment type, it is suggested for a replacement quote (see Chapter 5).
- **Units nearing failure or end of life.** For connected units, an estimated failure risk or a short remaining useful life raises an opportunity, with the evidence behind it.

Each lead carries the unit's repair history. If your shop's field-service or customer relationship management (CRM) system is connected, leads are also written there. The lead list shows open and won leads and the conversion rate. Zylergy Field raises the opportunity. It does not send quotes or dispatch work automatically. Your office sets the thresholds, as described in the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01), chapter "Service-plan catalog."

13.12 Reports for building owners

A building owner report or compliance report covers a unit, a group of units or a customer over a date range. It shows the maintenance performed, the findings, the out-of-spec items and how each was resolved, and any maintenance missed or deferred. You can produce it for a building owner, an auditor or a warranty claim. Building owners can also get their own reports in the customer portal.

SHOP OWNER OR OFFICE STAFF · WEB CONSOLE

1. Open the reports area.
2. Choose the unit, group or customer.
3. Choose the date range.
4. Produce the report.

5 Export the report.

RESULT

The report is produced from the append-only maintenance record. Access to it is recorded.

Reports can go to building owners on a schedule that your office sets.

14 CHAPTER 14

The customer portal

IN THIS CHAPTER

- What your customers see 123
- A single property 125
- Approvals in the customer portal 126
- How your shop runs the portal 126

In the customer portal, your customers, such as building owners and their facility managers, see their units, read visit records, get reports and approve what is waiting for them. The pages are read-only. Your shop administers the portal. In the web console, its section is labeled **Owner Portal**.

14.1 What your customers see

A customer signs in to the portal and sees only their own sites and units (Figure 14-1).

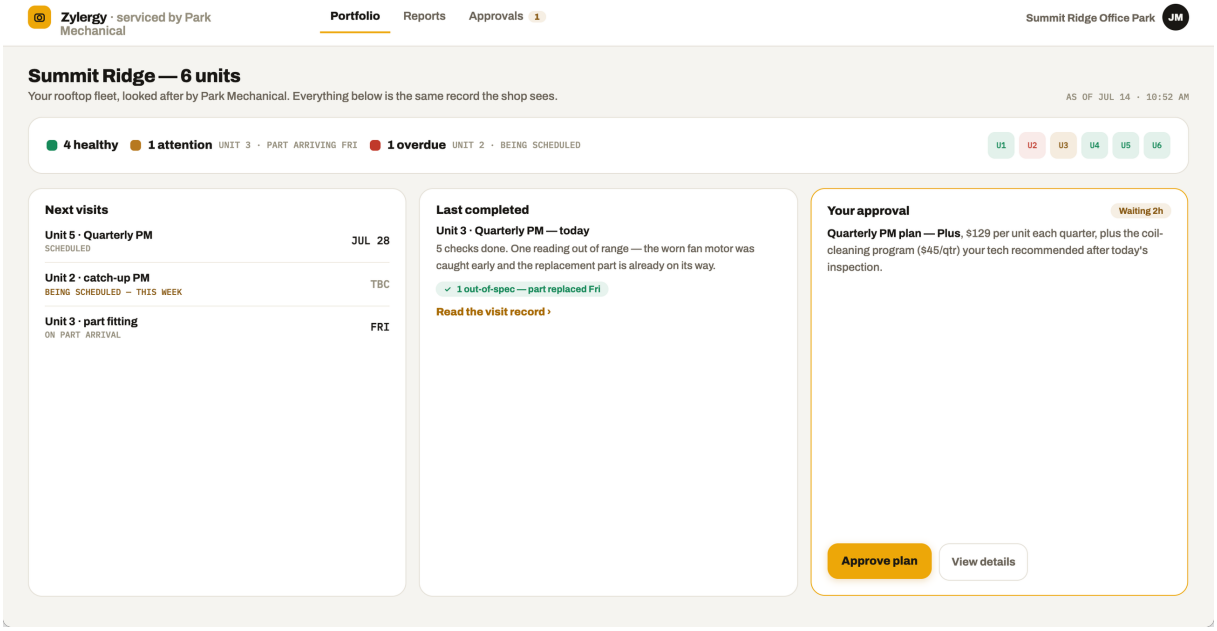


Figure 14-1 The customer portal for one site. Sample data.

BUILDING OWNER OR FACILITY MANAGER · CUSTOMER PORTAL (READ-ONLY)

Table 14-1 What is in the customer portal

AREA	WHAT IT SHOWS AND DOES
Portfolio	The customer's site and its units, with health: healthy, needing attention, overdue. Customers with several properties switch between them.
Next visits	Scheduled maintenance and visits, by unit and date.
Last completed	The latest visit, what was found and what was done. **Read the visit record** opens it in full.
Your approval	Anything waiting for the customer, such as a service plan, with **Approve plan** and **View details**.
Reports	Building owner and compliance reports for the customer's own units.
Approvals	All approvals waiting, including requests from other contractors to attach to the customer's site.

The events the customer sees are append-only and recorded. The customer sees no pricing beyond what they are asked to approve, and has no edit controls. If a customer's units are connected, the portal shows their condition and estimated risk, as far as the customer is entitled to see them.

14.2 A single property

For a customer with one property, the portal shows the units, the service record for each, and quotes and approvals on one page (Figure 14-2).

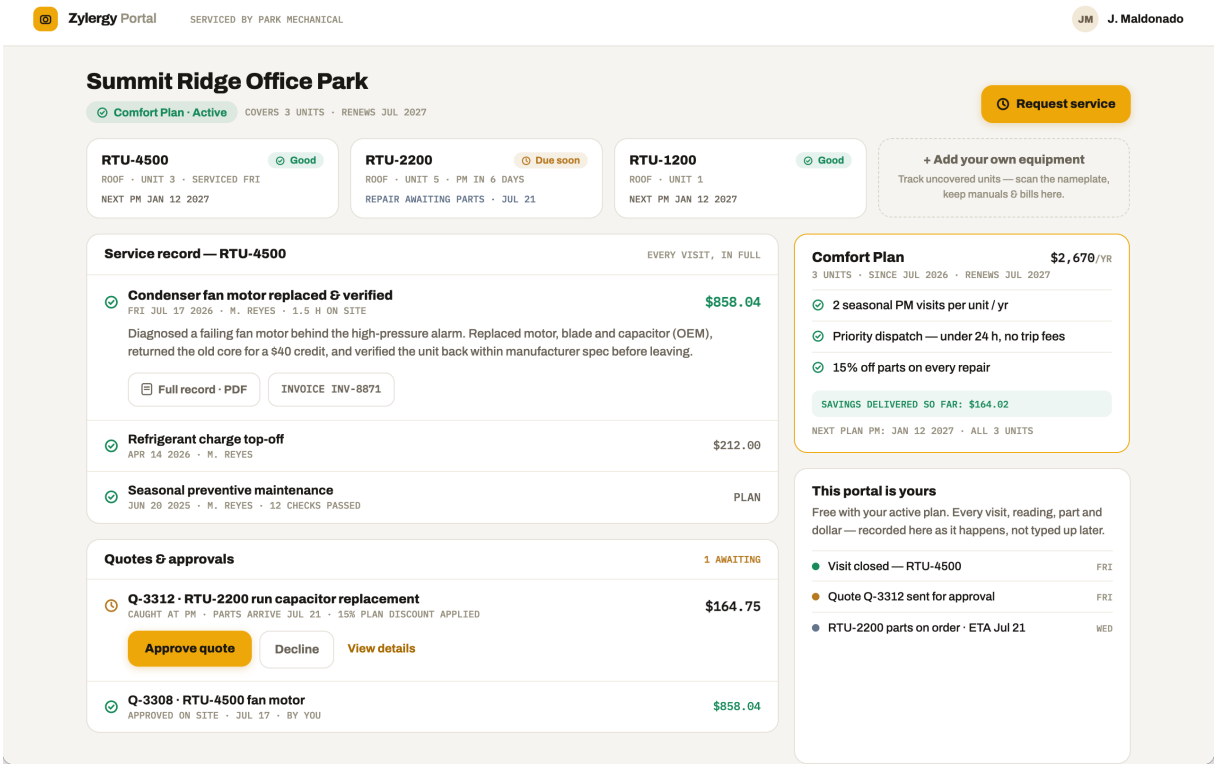


Figure 14-2 The customer portal for a single property. Sample data.

Table 14-2 What is on the single-property page

AREA	WHAT IT SHOWS AND DOES
Units	Each unit with its status and next maintenance.
Service record	Each visit in full, with **Full record · PDF**.
Plan	The customer's service plan and what it covers.
Quotes & approvals	Quotes waiting, with **Approve quote**, **Decline** and **View details**, and quotes already approved.

14.3 Approvals in the customer portal

Customers can approve three kinds of request in the portal:

- **Service plans** offered at a visit and not signed on the spot (Chapter 9).
- **Quotes** sent for approval.
- **Requests to attach** from a contractor that scanned one of the customer's units and asked for access to its record ("Request access to a unit someone else already holds" on page 27). The customer approves or declines. Until the customer approves, the contractor sees only the unit's identity. An approval attaches the contractor to the site, within the contractor's own entitlements.

When a customer approves or declines, the technician and the office see the result in their notifications and in the work queue.

14.4 How your shop runs the portal

Your shop decides which customers have portal access and invites them. In the web console, **Owner Portal** shows the portal as your customers see it. **Open owner view** on a unit page shows that unit's customer view.

Customers sign in to the portal, not to the console. The portal shows your shop's records. A visit appears after the technician's device syncs. The administrator's part is described in the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01), chapter "Account and shop."

15 CHAPTER 15

Screen reference

Each entry gives the screen's purpose, how to get to it, and its main areas and actions, with the figure that shows it. The entries follow this order: the app on iPhone, the app on iPad, the web console, and the customer portal. For screens used only for administration (Organization & access, the document catalog and access rules, and checklist derivation), see the *Zylergy Field Admin Guide* (ZY-FLD-ADG-01).

15.1 Sign-in

Purpose: sign in to the app with your work email. **To get there:** open the app when you are signed out. **Figure:** Figure 2-1.

Table 15-1 Sign-in screen

AREA OR CONTROL	WHAT IT DOES
Work email and **Continue**	Starts sign-in. A shop that uses single sign-on sends you to its sign-in page. Otherwise, the app asks for a 6-digit code.
Face ID offer	After the first sign-in, offers Face ID for next time.
Footer	Reminds invited users that the join link is in their email, and shows **Help**.

15.2 Home

Purpose: your day. **To get there:** tap **Home**. **Figure:** Figure 2-2, with the areas in Table 2-3.

15.3 Menu

Purpose: manuals, the service log, orders, offline storage, notifications, your account and help. **To get there:** tap **Menu**. **Figure:** Figure 2-3, with the rows in Table 2-5.

15.4 Search

Purpose: find manuals, units, orders and cases. **To get there:** tap the search field on Home or the Menu. **Figure:** Figure 2-4.

Table 15-2 Search screen

AREA OR CONTROL	WHAT IT DOES
Search field and **Cancel**	Enter a model, topic, serial or order number.
All, **Manuals**, **Units**, **Orders**, **Cases**	Narrow the results.
Result groups	Each result opens its manual page, unit chart, order or case. **Licensed** and **Locked** show document access.

15.5 What changed (notifications)

Purpose: what needs you and what is for your information. **To get there:** **Menu** > **Notifications**, or a push notification. **Figure:** Figure 2-5.

Table 15-3 What changed screen

AREA OR CONTROL	WHAT IT DOES
Needs you	Items that clear when you do the work: exceptions, labels to print, approvals waiting. Tap to act.
FYI — swipe to clear	Items for your information. Swipe an item and tap **Clear**.
Header count	How many items need you. The bottom-bar badge shows this count too.

15.6 Settings

Purpose: your personal device settings. **To get there:** **Menu** > **Account, shop & role**. **Figure:** Figure 2-6, with the settings in Table 2-8.

15.7 Scan

Purpose: identify a unit. **To get there:** tap **Scan**. **Figure:** Figure 3-1.

Table 15-4 Scan screen

AREA OR CONTROL	WHAT IT DOES
Camera view	Reads the unit's nameplate on the device. Works offline.
Recognition chip and **Open chart**	Shows make, model, serial number and location. Compare them with the nameplate, then tap **Open chart**.
QR / tag, **Recents**, **Type it**	Other ways to identify the unit.
Unknown model chip	Offers to capture the unit and its manual.

15.8 Unit chart

Purpose: one unit's identity, status, open work, documents, history and actions. **To get there:** identify and confirm a unit. **Figure:** Figure 3-2, with the areas in Table 3-2.

15.9 Equipment context

Purpose: what you are entitled to see about a unit before you ask the assistant. **To get there:** on the unit chart, tap **Diagnose a fault**. **Figure:** Figure 3-3.

Table 15-5 Equipment context screen

AREA OR CONTROL	WHAT IT DOES
Manuals & documents	The unit's documents, with **Licensed**, **Public** or **Not entitled**, and whether they are cached.
Schematics & illustrations	Diagrams taken from the documents. Tap one to open it.
Service & repair history	Open and closed cases.
Ask about this unit	Opens the assistant.

15.10 Manuals and documents

Purpose: read the documents for a unit or search the library. **To get there: Manuals & documents** on the unit chart or the Menu, or any citation. **Figure:** Figure 3-4.

Table 15-6 Manuals and documents screen

AREA OR CONTROL	WHAT IT DOES
This unit, **All documents**	Switch between the unit's documents and the whole library.
Document list	Documents with their access badges. Tap one to open it.
Open page and **Cited by**	The page, with links to the diagnosis or checklist item that cites it.
Back button	Returns to the checklist or diagnosis you came from.

15.11 Service log

Purpose: the append-only history of a unit or of your shop. **To get there: Service log & history** on the unit chart or the Menu. **Figure:** Figure 3-5.

Table 15-7 Service log screen

AREA OR CONTROL	WHAT IT DOES
This unit and the all-units tab	Switch scope.
All, **Maint**, **Diag**, **Orders**, **Returns**	Filter by type.
Timeline entries	Open the entry with its findings, sources and orders.

15.12 No manuals yet (nameplate read)

Purpose: what to do when the library has nothing for a model. **To get there:** identify a unit whose model has no documents. **Figure:** Figure 3-6.

Table 15-8 No manuals yet screen

AREA OR CONTROL	WHAT IT DOES
No manuals yet for this model	Explains that the assistant does not answer without documents for the model.
Search the manufacturer's support	Opens the manufacturer's web page.
Capture this manual	Attach a PDF or photograph pages for review.

15.13 Ask about this unit

Purpose: start a conversation with the assistant. **To get there:** **Ask about this unit** on the equipment context. **Figure:** Figure 4-1.

Table 15-9 Ask about this unit screen

AREA OR CONTROL	WHAT IT DOES
Header	How many documents you are entitled to for the unit.
Describe a symptom, **Ask for a procedure**, **Look up a spec**	Choose the type of question.
Input field, microphone and send	Type or speak your question and send it.

15.14 Diagnose (clarifying question)

Purpose: answer the assistant's questions. **To get there:** describe a symptom. **Figure:** Figure 4-2.

Table 15-10 Diagnose screen

AREA OR CONTROL	WHAT IT DOES
This unit only	Confirms the scope of the answer.
Question and citation	What the assistant needs to know, and the section it is working from.
Quick answers, **Or type what you see**	Answer in one tap or in your own words.

15.15 Likely cause

Purpose: the cause the evidence supports. **To get there:** answer the assistant's questions. **Figure:** Figure 4-3, with the areas in Table 4-1.

15.16 Cited source

Purpose: check an answer against the manual. **To get there:** **Open source** or a citation. **Figure:** Figure 4-4.

Table 15-11 Cited source screen

AREA OR CONTROL	WHAT IT DOES
Page	The page with the passage the answer used highlighted.
Page controls	Previous and next pages.
Back to diagnosis	Returns to the conversation.

15.17 Not covered

Purpose: a question the documents do not cover. **To get there:** the assistant shows it instead of an answer. **Figure:** Figure 4-5.

Table 15-12 Not covered screen

AREA OR CONTROL	WHAT IT DOES
Closest section	Opens the nearest section the manuals have.
Escalate to the office with this thread	Sends the conversation to your office.
Manufacturer search	Opens the manufacturer's web page.
Locked document and **Request**	Asks for access to a document outside your entitlements.

15.18 Repair steps

Purpose: follow a repair from the manual. **To get there: Walk me through the fix**. **Figure:** Figure 5-1.

Table 15-13 Repair steps screen

AREA OR CONTROL	WHAT IT DOES
Caution line	The manual's cautions for the procedure.
Steps with citations	Each step and its page. Tap a citation to open it. **Needs a part** marks a step that needs a part.
Mark step *n* done	Checks off the current step.

15.19 This step needs a part

Purpose: get the part a repair step needs. **To get there:** tap **Needs a part** on a step. **Figure:** Figure 5-2.

Table 15-14 This step needs a part screen

AREA OR CONTROL	WHAT IT DOES
Part card	The part, filled in with the unit and case.
Already on the truck? and **On hand**	Use a part you carry.
Find & order this part	Opens the parts flow.

15.20 Save to the service log

Purpose: log a repair. **To get there:** finish the repair steps. **Figure:** Figure 5-3.

Table 15-15 Save to the service log screen

AREA OR CONTROL	WHAT IT DOES
Cause, **Done**, **Sources**, **Part order**, **Unit / Case**	What will be logged.
Add a note or photo — optional	Adds detail.
Save to service log	Logs the repair.

15.21 Parts catalog

Purpose: browse or search a unit's parts. **To get there: Find a part** on the unit chart. **Figure:** Figure 6-1.

Table 15-16 Parts catalog screen

AREA OR CONTROL	WHAT IT DOES
Search field	Searches by name, part number or figure reference.
Exploded diagrams	Opens a diagram. Tap a callout for its part.
Part list	Opens a part's detail.
Identify a part with the camera	Opens the camera.

15.22 Photograph a part

Purpose: photograph a part for matching. **To get there: Identify a part with the camera**. **Figure:** Figure 6-2.

Table 15-17 Photograph screen

AREA OR CONTROL	WHAT IT DOES
Frame and shutter	Takes the photo.
Angle tiles	Show the photos taken. The add tile takes another.
Match	Matches the photos against the unit's catalog, on the device.

15.23 Match found

Purpose: confirm a confident match. **To get there:** tap **Match**. **Figure:** Figure 6-3.

Table 15-18 Match found screen

AREA OR CONTROL	WHAT IT DOES
Your photo and the catalog part	Compare them.
Confidence and basis	How strong the match is and what it is based on.
This is it — choose a source, **See other candidates**	Confirm, or look at other candidates.

15.24 A few possible matches

Purpose: choose between candidates. **To get there:** tap **Match** when the app is not sure. **Figure:** Figure 6-4.

Table 15-19 Possible matches screen

AREA OR CONTROL	WHAT IT DOES
Candidates	Each with its confidence and why it was suggested.
Open exploded diagram, **Add a label shot**	Check before you choose.
Confirm button	Confirms the candidate you chose.

15.25 Part detail

Purpose: compare fitment options. **To get there:** confirm a match, or tap a part in the catalog. **Figure:** Figure 6-5.

Table 15-20 Part detail screen

AREA OR CONTROL	WHAT IT DOES
OEM original, **Compatible derivatives**	The fitment tiers.
Pairs with and **Add**	Parts to replace together.
Choose a source	Opens the source list.

15.26 Choose source

Purpose: choose where the part comes from. **To get there: Choose a source**. **Figure:** Figure 6-6.

Table 15-21 Choose source screen

AREA OR CONTROL	WHAT IT DOES
Cheapest, **In stock**, **Fastest**	Sort the sources.
Source rows	Price, stock, timing, warranty and core credit for each source.
Add to cart	Adds the part from the selected source.

15.27 Cart

Purpose: review the parts for a case. **To get there: Add to cart**. **Figure:** Figure 6-7.

Table 15-22 Cart screen

AREA OR CONTROL	WHAT IT DOES
Lines and stepper	Parts, quantities and prices, and core credits.
Add another part — photograph it	Returns to the camera.
Review with customer	Opens the customer's view.

15.28 Customer sign-off

Purpose: the customer approves the total. **To get there: Review with customer**. **Figure:** Figure 6-8.

Table 15-23 Customer sign-off screen

AREA OR CONTROL	WHAT IT DOES
Customer view	Site, parts and total with your shop's markup.
Approved on site	Shows who approved and when.
Continue to delivery	Opens delivery options.

15.29 Ship it where?

Purpose: choose delivery and speed. **To get there: Continue to delivery**. **Figure:** Figure 6-9.

Table 15-24 Ship it where? screen

AREA OR CONTROL	WHAT IT DOES
Customer site — dropship, **Shop / office**, **My address**	Destinations.
Overnight, **2-day**, **Ground**	Speeds, with arrival times.
Place order	Places the order.

15.30 Order placed

Purpose: confirm the order. **To get there:** **Place order**. **Figure:** Figure 6-10.

Table 15-25 Order placed screen

AREA OR CONTROL	WHAT IT DOES
Confirmation	Order number, arrival and lines.
Case link	The prompt to resume the repair when parts arrive.
Back to today's jobs	Returns to your route.

15.31 Orders board

Purpose: parts arriving and returns in flight. **To get there:** tap **Orders**. **Figure:** Figure 7-1.

Table 15-26 Orders board screen

AREA OR CONTROL	WHAT IT DOES
Mine, **Crew**, **Firm**	Whose orders you see.
Arriving, **Returns in flight**	Open orders and returns.
Order history	Past orders.

15.32 Order status

Purpose: status of each order line. **To get there:** open an order from the orders board. **Figure:** Figure 7-2, with the statuses in Table 7-1.

15.33 Return: find the order

Purpose: start a return. **To get there:** start a return from **Orders**. **Figure:** Figure 7-4.

Table 15-27 Find the order screen

AREA OR CONTROL	WHAT IT DOES
Scan to find	Finds the order from the nameplate and the part.
Orders I placed, **A coworker's**, **By customer**, **Whole firm**, search	Browse for the order.

15.34 Return: what is going back

Purpose: choose the lines to return. **To get there:** choose an order. **Figure:** Figure 7-5.

Table 15-28 Return: what is going back screen

AREA OR CONTROL	WHAT IT DOES
Lines	Select lines and quantities. Each line shows whether it is returnable.
Choose a reason	Continues.

15.35 Return: why is it going back

Purpose: give the reason. **To get there: Choose a reason**. **Figure:** Figure 7-6.

Table 15-29 Why is it going back screen

AREA OR CONTROL	WHAT IT DOES
Reasons	**Broken / defective**, **Wrong part**, **Doesn't fit**, **Not needed**, **Over-ordered**, **Other**.
Add a photo of the issue	Optional photo.
Also reorder a replacement now	Orders a linked replacement.
How to return it	Continues.

15.36 Return: how is it getting back

Purpose: choose the return method. **To get there: How to return it**. **Figure:** Figure 7-7.

Table 15-30 Return: how is it getting back screen

AREA OR CONTROL	WHAT IT DOES
Drop at a parts dealer	Counter return with the RMA number. No label is needed.
Ship it back	Mail-back with a prepaid label printed at the console.
Review credit	Continues.

15.37 Return: what comes back

Purpose: review the credit. **To get there: Review credit**. **Figure:** Figure 7-8.

Table 15-31 What comes back screen

AREA OR CONTROL	WHAT IT DOES
Credit lines	Part price, any restocking fee and return shipping, net credit.
Replacement	The linked replacement order, if any.
Submit return	Submits the return.

15.38 Return reported

Purpose: confirm the return. **To get there: Submit return**. **Figure:** Figure 7-9.

Table 15-32 Return reported screen

AREA OR CONTROL	WHAT IT DOES
Progress	**Reported**, **Awaiting receipt**, **Credited**.
Next step	For example, print the label at the console.
Back to today's jobs	Returns to your route.

15.39 Maintenance (what is due)

Purpose: what is due on a unit and at the site. **To get there: Run maintenance**. **Figure:** Figure 8-1.

Table 15-33 Maintenance screen

AREA OR CONTROL	WHAT IT DOES
Due checklist	Name, template version, item count, last completed.
Site list	Other units at the site with their status.
Start the checklist	Opens the checklist.

15.40 Checklist

Purpose: the items of a checklist. **To get there:** **Start the checklist**. **Figure:** Figure 8-2, with the item types in Table 8-1.

15.41 Pass or fail item

Purpose: record a pass or fail finding. **To get there:** open a pass or fail item. **Figure:** Figure 8-3.

Table 15-34 Pass or fail item screen

AREA OR CONTROL	WHAT IT DOES
Pass, **Fail**	Record the finding.
Fail — capture the reason, photo	Describe a failure.
N/A: skip, **Save — next item**	Skip with a reason, or save and move on.

15.42 Reading item

Purpose: record a measured value. **To get there:** open a reading item. **Figure:** Figure 8-4, with the verdicts in Table 8-2.

15.43 Finding points to a part

Purpose: act on a finding that points to a part. **To get there:** the app offers it after an out-of-spec or failed finding. **Figure:** Figure 8-5.

Table 15-35 Finding points to a part screen

AREA OR CONTROL	WHAT IT DOES
Candidate part	The primary candidate and any cheaper check first.
Flag for follow-up, **Add to close quote**	Leave it for the office, or quote it at the end of the visit.
Find & order the part, **Mark on hand instead**	Order it, or use a part you carry.

15.44 Complete and log

Purpose: log the completed checklist. **To get there:** finish the last item. **Figure:** Figure 8-6.

Table 15-36 Complete and log screen

AREA OR CONTROL	WHAT IT DOES
Summary	Each finding, with failures and out-of-spec readings marked.
Linked order and next due	What was ordered and when the checklist is next due.
Complete & log	Saves one maintenance event to the service log.

15.45 Service plan offer

Purpose: present your shop's plans. **To get there:** at the end of a visit. **Figure:** Figure 9-1.

Table 15-37 Service plan offer screen

AREA OR CONTROL	WHAT IT DOES
Customer view	Shows only what the customer should see.
Tiers and add-ons	From your shop's published catalog. Add-ons raised by findings are marked.
Signature area and approve button	The customer approves the chosen plan.
Email a copy, **Remind next visit**	Follow up later.

15.46 Pack for offline

Purpose: download the day's units. **To get there:** **Menu** > **Offline & pack**. **Figure:** Figure 10-1.

Table 15-38 Pack for offline screen

AREA OR CONTROL	WHAT IT DOES
Today's units	Each unit with its contents, size and packed status.
My regular appliances and **Manage**	Models kept packed.
Pack now	Downloads the selected units.

15.47 Offline storage

Purpose: see and free storage. **To get there: Offline & storage** in Settings. **Figure:** Figure 10-2.

Table 15-39 Offline storage screen

AREA OR CONTROL	WHAT IT DOES
Active jobs — locked	Not cleared automatically.
Recently closed — auto-clears and **Select**	Cleared 30 days after close, or now.
Manage regulars, **Free up space**	Manage regular appliances, or clear what you selected.

15.48 My regular appliances

Purpose: models kept packed. **To get there: Manage** next to **My regular appliances**. **Figure:** Figure 10-3.

Table 15-40 My regular appliances screen

AREA OR CONTROL	WHAT IT DOES
Search	Find a model by make, model or type.
Model toggles	Keep a model packed, or stop.
Add appliance	Adds a model.

15.49 iPad: cab briefing

Purpose: the day on iPad. **To get there: Home** on iPad. **Figure:** Figure 11-1.

Table 15-41 Cab briefing screen

AREA OR CONTROL	WHAT IT DOES
Today	Stops in order, with a summary. Tap a stop to select it.
Selected stop	Readings, work to pick up, what is arriving, the site.
Open the chart	Opens the stop's unit.

15.50 iPad: unit chart

Purpose: the unit chart on iPad. **To get there: Open the chart**, or identify a unit. **Figure:** Figure 11-2.

Table 15-42 Unit chart on iPad

AREA OR CONTROL	WHAT IT DOES
Unit and readings	Identity, open case, recent readings, age.
Find a part, **Diagnose a problem**, **Run maintenance**	The three actions.
Log, **Manuals**	The companion pane.

15.51 iPad: diagnosis beside the page

Purpose: diagnose with the cited page open. **To get there: Diagnose a problem**. **Figure:** Figure 11-3.

Table 15-43 iPad diagnosis screen

AREA OR CONTROL	WHAT IT DOES
Conversation	Questions, the likely cause and its sources.
Cited page	The page with the passage highlighted, and **Open full page**.
Input and microphone	Add a reading or a follow-up.

15.52 iPad: checklist beside the schematic

Purpose: run a checklist with the cited drawing open. **To get there: Run maintenance**. **Figure:** Figure 11-4.

Table 15-44 iPad checklist screen

AREA OR CONTROL	WHAT IT DOES
Items	The active item with its reading, verdict and trend.
Drawing pane	Follows the active item. Pinch to zoom.
Item actions	Log and flag, measure again, add a photo, add a follow-up part.

15.53 iPad: part in context

Purpose: find a part on the exploded view. **To get there: Find a part**. **Figure:** Figure 11-5.

Table 15-45 iPad part screen

AREA OR CONTROL	WHAT IT DOES
Exploded view	Tap a callout to load its part.
Part and cart	Options, prices, stock and the cart.
Review with the customer, **Send to the shop instead**	Customer approval, or leave the cart for the office.

15.54 iPad: full-page reader

Purpose: read a page full size. **To get there: Open full page**, or turn the iPad to portrait. **Figures:** Figure 11-6, Figure 11-7, Figure 11-8, Figure 11-9.

Table 15-46 Full-page reader screen

AREA OR CONTROL	WHAT IT DOES
Page	Tap to show or hide the controls. Pinch to zoom.
Page, **Reader**	Printed layout or reflowed text.
Cited by, page controls, **Next citation**	Move between citations and pages.
Back to diagnosis	Returns to the split view.

15.55 Console sign-in

Purpose: sign in to the console and choose a shop. **To get there:** open the console address. **Figure:** Figure 12-1.

Table 15-47 Console sign-in screen

AREA OR CONTROL	WHAT IT DOES
Email and **Change**	The address you sign in with.
Choose your shop and **Continue**	Pick the shop to work in.
Shared terminal tiles and PIN	Fast user switching on the shared terminal.

15.56 Console home

Purpose: what needs attention today. **To get there:** **Dashboard**. **Figure:** Figure 13-1, with the areas in Table 13-2.

15.57 Your items

Purpose: desk tasks the app sent ahead. **To get there:** the landing page for technicians, or the rail on the console home. **Figure:** Figure 12-2.

Table 15-48 Your items screen

AREA OR CONTROL	WHAT IT DOES
Items	**Print label**, **Track**, **Library**.
Also	**Upload a manual**, **Check an order**, **Start a return**.
Switch user	Returns to the shared-terminal tiles.

15.58 Unit page

Purpose: one unit in the console. **To get there:** any link to a unit, ⌘K, or G then U. **Figure:** Figure 12-4, with the areas in Table 12-5.

15.59 Console search

Purpose: find anything in the console. **To get there:** press ⌘K. **Figure:** Figure 12-3.

Table 15-49 Console search

AREA OR CONTROL	WHAT IT DOES
Search field	IDs, units, customers or actions.
Results and **Related**	The record and what is linked to it.
Keys	Arrows to move, Return to open, Esc to close.

15.60 Work queue

Purpose: items that need the office. **To get there:** G then Q, or an attention tile. **Figure:** Figure 13-2.

Table 15-50 Work queue screen

AREA OR CONTROL	WHAT IT DOES
All, **Approvals**, **Reviews**, **Exceptions**, **Overdue**, **Done today**	Filter the queue.
Row actions	**Approve**, **Reject…**, **Open review panel**, **Reship**, **Credit instead**, **Schedule now**.
Selection bar	**Assign to…**, **Clear selection**.

15.61 Order book

Purpose: all open order lines. **To get there: Orders**. **Figure:** Figure 7-3.

Table 15-51 Order book screen

AREA OR CONTROL	WHAT IT DOES
Filters	**All techs**, **Customer**, **Type**, **Status**.
Order lines	Part, quantity, technician, job, status, arrival.
Reassign a portion and **Ledger**	Split a line to another job and see the record.

15.62 Returns console

Purpose: labels and credits for returns. **To get there: Orders**, then the returns list. **Figure:** Figure 12-5.

Table 15-52 Returns console screen

AREA OR CONTROL	WHAT IT DOES
Open returns	Returns with their status.
Shipping label	**Print label**, **Packing slip**, **RMA barcode**.
Credit	Credit lines, and the apply button once the part is received.

15.63 Contribute a manual

Purpose: upload a manual for review. **To get there: Documents** > **Upload / attach**, or **Upload a manual**. **Figure:** Figure 12-6.

Table 15-53 Contribute a manual screen

AREA OR CONTROL	WHAT IT DOES
Upload area	Drop the PDF or scan.
Fields	Model, serial number, document type, declared source, licensing note.
Provenance, **What happens next**, **Submit to review**	Where it came from, the review steps, and submission.

15.64 Review queue

Purpose: verify uploads before they are published. **To get there: Documents**, then the review queue. **Figure:** Figure 13-3.

Table 15-54 Review queue screen

AREA OR CONTROL	WHAT IT DOES
Queue and **Select all**, **Assign**, **Reject…**	Submissions with their status.
Preview	The submitted pages and what was read from them.
Verify, **Confirm model**, **Assign entitlement**	Checks and access.
Publish — tenant-private, **Request full scan**, **Reject — reason…**	The decision.

15.65 Schedule and reminders

Purpose: maintenance schedule for a site. **To get there: Maintenance**, then the site's schedule. **Figure:** Figure 13-4.

Table 15-55 Schedule and reminders screen

AREA OR CONTROL	WHAT IT DOES
Unit list	Template, last done, next due and status for each unit.

Reminders	Upcoming, overdue and **Owner digest** (for the building owner), each turned on or off.
Bulk apply, **Save schedule**	Apply a template to several units, or save the schedule.

15.66 Maintenance dashboard

Purpose: maintenance status across units. **To get there: Maintenance**. **Figure:** Figure 13-5.

Table 15-56 Maintenance dashboard screen

AREA OR CONTROL	WHAT IT DOES
Tiles	**Due**, **Overdue**, **Complete**, **On watch**.
Filters and view switch	Site, group and status, and the customer's read-only view.
Unit list	Status, last done, findings and next due. Click a unit for its history.

15.67 Watch list

Purpose: units trending toward trouble. **To get there: Maintenance**, then the watch list. **Figure:** Figure 13-6.

Table 15-57 Watch list screen

AREA OR CONTROL	WHAT IT DOES
Flags	The unit, what is trending, the rule and the history, marked **Severe** or **Watch**.
Open unit, **Acknowledge**, **Dismiss**	Act on a flag.

15.68 Service-plans builder

Purpose: build and publish service plans. **To get there:** **Service Plans**. **Figure:** Figure 13-7.

Table 15-58 Service-plans builder screen

AREA OR CONTROL	WHAT IT DOES
Segment tabs and tiers	Each tier with **Edit** and its status.
Add-on services and **+ New add-on**	Add-ons and the findings that bring them up.
Per-customer override and **Manage**	Terms for one customer.
Field preview, **Publish to the field**	Check and publish.

15.69 Shop owner's dashboard

Purpose: how the shop is doing. **Figure:** Figure 13-8, with the areas in Table 13-5.

15.70 My settings

Purpose: personal console settings. **To get there:** your avatar, then **My settings**. **Figure:** Figure 12-7, with the settings in Table 12-6.

15.71 Customer portal: site

Purpose: what a customer sees for a site. **To get there:** the customer signs in to the portal. In the console, click **Owner Portal**. **Figure:** Figure 14-1, with the areas in Table 14-1.

15.72 Customer portal: single property

Purpose: one property's units, record and approvals. **To get there:** the customer signs in to the portal. **Figure:** Figure 14-2, with the areas in Table 14-2.

16 CHAPTER 16

Troubleshooting

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Each table lists what you see, why it happens and what to do. If the problem continues, ask your office. Your administrator can contact Zylergy support in the app (**Menu** > **Help**) or by email at support@zylergy.com, Monday through Friday, 8 a.m. to 6 p.m. US Central time.

16.1 Signing in

Table 16-1 Troubleshooting sign-in

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.
“We don’t see that address at a shop yet”	The email address is not on an invitation.	Check the address. If it is correct, ask your administrator to invite you.

No 6-digit code arrives	The code is delayed, or it went to an old cell phone number or email address.	Wait a moment and try again. If the code still does not arrive, ask your administrator to check your cell phone number and email address.
The console asks you to choose a shop every time	The browser does not keep the choice, for example in a private window.	Use a normal browser window.
“You were signed out — pick up where you left off.”	The console signed you out after a period without activity.	Sign in again. The console returns you to where you were.
You cannot sign in on the shared terminal	Your tile is not set up, or the PIN is wrong.	Ask your administrator.

16.2 Identifying units

Table 16-2 Troubleshooting identifying units

WHAT YOU SEE	WHY	WHAT TO DO
No camera view on **Scan**	Camera access is not allowed.	Use **Type it**, or allow camera access for Zylergy Field in the iOS Settings app.
The unit on the screen does not match the nameplate	The app recognized a different unit, or the unit is not yet in your shop’s records.	Do not continue. Scan again, scan a QR code, or use **Type it**.
The nameplate is not recognized	Poor light, glare, or a damaged plate.	Use the flashlight, change the angle, scan the tag, or use **Type it**.
The unit is recognized but not on the roster	The unit has not been added to the customer’s site.	Add it to the site (see Chapter 3).
The app offers to request access to a record	The building owner or another contractor already holds the unit’s record.	Request access (see Chapter 3). Until access is approved, you see only the unit’s identity.
The unit chart does not open offline	The unit is not in your offline pack.	Pack again over Wi-Fi, or open it when you are back online.

16.3 The assistant and documents

Table 16-3 Troubleshooting the assistant and documents

WHAT YOU SEE	WHY	WHAT TO DO
The assistant does not answer	The assistant needs a signal.	You can still open the manuals stored on the device under **Manuals & documents**. Ask again when you are back online.
The assistant is temporarily unavailable	The assistant has been turned off for a time.	Use the manuals stored on the device. Try again later.
Not covered	The documents you are entitled to do not cover the question.	Open the closest section, escalate to the office, or check the manufacturer's documentation. Do not act on an uncited answer.
Low confidence with two causes	The evidence does not separate them.	Open both sources, take the reading or check they suggest, and answer again.
A document shows **Locked** or **Not entitled**	You do not hold the entitlement role for the document.	Tap **Request**, or ask your administrator which entitlements your shop holds.
No manuals for a model	The library has nothing for the model yet.	Capture the manual (see Chapter 3).
A captured manual stays **In review**	It is waiting for review.	Ask your administrator. You get a notification when it is published or rejected.

16.4 Parts and orders

Table 16-4 Troubleshooting parts and orders

WHAT YOU SEE	WHY	WHAT TO DO
The photo match offers several candidates	The photo and label are not enough to be sure.	Add a label shot, open the exploded diagram, or search the catalog.
Adding a part to the cart is blocked	The part is refrigerant-restricted and your EPA 608 certification is not on file.	Ask your office to authorize delivery to a certified team member, and to record your certification.

The order is pending approval	The order meets a rule your shop set for approval, such as an amount threshold.	Wait for the approver's decision. It comes as a notification.
The payment method was declined	The shop's payment method could not be authorized.	Tell your office. Technicians cannot change payment methods.
A line shows backordered	The supplier does not have it in stock.	Choose another source, or keep the order and its new date.
Order times look old	Order status needs a signal.	The app shows the time of the last sync. Status updates when you are back online.
A queued order disappeared	Orders not sent within 7 days expire.	Build the cart again when you are online.
The comparison of sources is missing for a part	Your shop buys that manufacturer's parts from one supplier under its agreement.	Order from the source shown.

16.5 Returns

Table 16-5 Troubleshooting returns

WHAT YOU SEE	WHY	WHAT TO DO
A line cannot be selected for return	It was installed or consumed, or it is outside the return window.	Ask your office.
The label is not in the app	Prepaid labels print at the web console.	Print it from **Your items** ("Print a return label" on page 100).
The return stays **Awaiting receipt**	The supplier has not confirmed receipt.	Check that the part was dropped off or shipped. Give your office the tracking number.
The credit is less than the part price	A restocking fee or return shipping applies under the return policy.	See the credit lines on the return.
A return was reported by mistake	The report was submitted in error.	Cancel it on the same business day. After that, ask your office.

16.6 Maintenance

Table 16-6 Troubleshooting maintenance

WHAT YOU SEE	WHY	WHAT TO DO
No checklist under **Run maintenance**	No checklist template has been published for the model, or none is due.	Ask your office or your administrator.
A checklist range differs from the manual	The template was adjusted at review, or the manual has a newer revision.	Follow the current manufacturer's documentation and report the difference to your office.
A completed checklist does not show at the office	Your device has not synced yet.	Connect to a network. The event is sent automatically.
A finding was logged wrongly	The service log is append-only.	Ask your office to add a correction linked to the original.
A unit appears on the watch list	Its recorded history shows a trend toward trouble.	Open the unit's readings and history. Your office decides the follow-up.

16.7 Offline and storage

Table 16-7 Troubleshooting offline work

WHAT YOU SEE	WHY	WHAT TO DO
A unit's manuals are not available offline	The unit was not in your offline pack.	Pack again over Wi-Fi (“Pack your day for offline work” on page 81).
Packing does not start	Packing runs over Wi-Fi only by default.	Connect to Wi-Fi.
The device is low on space	Offline data fills the device.	Free space from recently closed jobs (“Manage offline storage” on page 83), or turn off regular appliances you no longer need.
Work recorded offline has not appeared elsewhere	The device has not synced.	Connect to a network and open the app.

16.8 Web console

Table 16-8 Troubleshooting the web console

WHAT YOU SEE	WHY	WHAT TO DO
A section is missing from the top of the console	Your role does not include it.	Ask your administrator about your role.
The apply credit button is unavailable	The part has not been received and inspected.	Wait for the supplier's confirmation.
A customer cannot see a visit in the customer portal	The technician's device has not synced, or the customer has no portal access.	Check the unit's timeline. Ask your administrator about portal access.
The console opens on the wrong page	**My settings** has another landing page set.	Set **My landing** to **Auto by role** or the page you want.

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.

console home

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

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.

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.

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.

QR tag

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

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.

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**.

un-provisioned unit

A unit Zylergy Field recognizes but has no documents or no record for yet. You can capture its manual for review.

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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