

On our first visit our engineer will carry out a condition survey of **all assets**, testing them and providing them with an operational & condition rating of between 1 & 6. A rating of 1 would indicate the **asset** is in excellent operating condition.

A rating of 6 would indicate the **asset** should be budgeted for replacement and we will provide prices and a schedule for this.

Next our engineer would make a record of all the key components of the **asset**, including serial & product numbers and the manufacturer. We will also list suggested consumable items such as filters and belts that should be carried as on site spares or included in further service visits.

- Asset number & record each item of equipment
- Determine & record condition status of each item of equipment
- Complete for "F Gas" regulations type and weight of refrigerant. AC

AC Condensing Unit										
	Location	Serial No.	Make	Model	Refrigerant Type	Refrigerant Weight	Building	Floor Served	Service Level	Result
<input type="checkbox"/>	Side Light Well	J002382	Daikin Siesta	AZQS718ZV1B	R410a	2.75	Tower Building	Basement Pharmacy Stores	Bi annual	Passed
<input type="checkbox"/>	Side Light Well	1301912	Daikin Siesta	AZQS100B7V1B	R410a	2.9	Tower Building	Basement Pharmacy Stores	Bi annual	Passed
<input type="checkbox"/>	Rear of Building Lightwell	C00078812	Fujitsu	AOY14AND	R22	1.00kg	Tower Building	Ground Floor OPD	Bi annual	Passed
<input type="checkbox"/>	Rear of Building Lightwell	1405248	Daikin	RXYS06P8V1B	R410a	4.00kg	Tower Block	Ground Floor OPD rooms	Bi annual	Passed
<input type="checkbox"/>	Basement Gantry	42600385	Toshiba	RAVSM564ATPE	R410a	1.1	Tower Building	Mezzanine Plant Room	Bi annual	Passed
<input type="checkbox"/>	Basement Ramp	J001438	Daikin	RK3S5G2V1B9	R410a	1.2	Tower Building	Basement Server	Bi annual	Passed
<input type="checkbox"/>	Basement Ramp	J019889	Daikin	4MXS80E3V3B2	R410a	2.99	Tower Building	Basement Clean Room	Bi annual	Passed
<input type="checkbox"/>	Basement Ramp	J009155	Daikin	RKSS0J2V1B	R410a	1.70	Tower Building	Basement MEMS Office	Bi annual	Passed
<input type="checkbox"/>	Basement Ramp	J008343	Daikin	RXSS5J2V1B	R410a	1.2	Tower Building	Basement MEMS Office	Bi annual	Passed
<input type="checkbox"/>	Basement Ramp	86W02150	Mitsubishi	PURY-P250YGM-A	R410a	18.5	Tower Building	Ground floor Pharmacy	Bi annual	Passed
<input type="checkbox"/>	Basement Ramp	43000085	Toshiba	RAVSM1104UTPE	R410a	2.8	Tower Building	Basement Delivery Office	Bi annual	Passed
<input type="checkbox"/>	Basement Ramp	43000086	Toshiba	RAVSM1104ATPE	R410a	2.8	Tower Building	Basement Goods In	Bi annual	Passed
<input type="checkbox"/>	Basement Ramp	91U02899	Mitsubishi	PUHZRP100VKA	R410a	5	Tower Building	Basement CSSD Plant Room	Bi annual	Failed

Our online database, Simpro, has a fully functional Customer Portal. This will enable you to view all outstanding jobs, quotations, job history including asset test history and your financial account.

[www.Simpro.com](http://www.Simpro.com)

To log into the customer portal:

1. Click the customer portal URL we sent you. A page similar to the screenshot above will load.
2. Enter the **Username** and **Password** we sent you.
3. Click **Login**.

After you have logged in, you will be taken to the main screen of the portal, to the **Pending Jobs** page. Your name will appear in the top right corner, next to the **logout** icon; the main menu options display across the top of the screen.

## ▼ View quotes

View the status and details of your quotes through the portal.


To view quotes:

1. Hover over **Quotes** at the top of the page.
2. Click **Outstanding** or **Actioned**, depending on the quotes you wish to view.
3. View quote details as required. To find a specific quote, enter a quote number in the search bar and click **Search**.

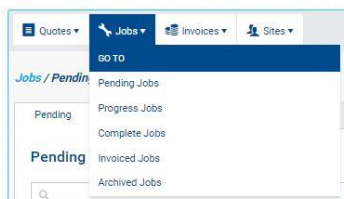
To switch between **Outstanding** and **Actioned** quotes, click the appropriate sub-tab.

To print a quote, click **Options > Print Quote**.

To view or upload attachments, click **Options > Attachments**.

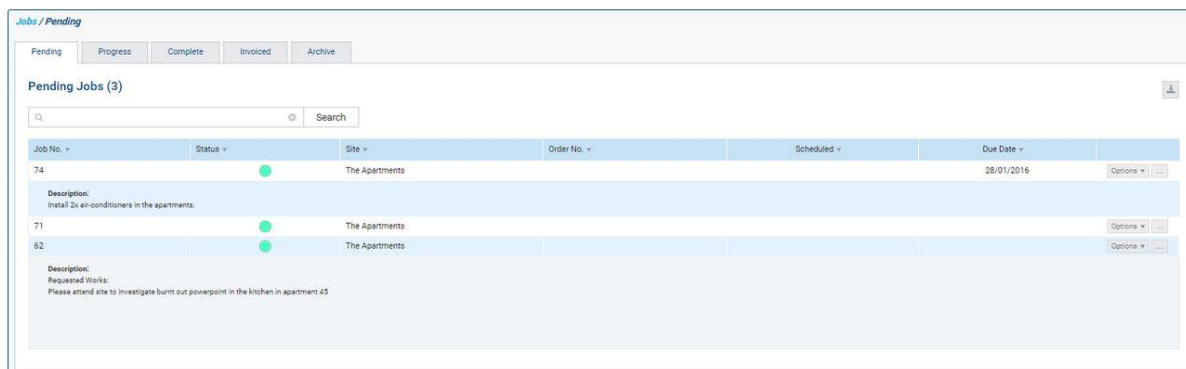
To download a spreadsheet of quote details, click the  icon in the top right corner, then click **CSV**.

View the status and details of your jobs through the portal.



To view jobs:

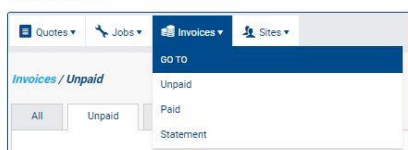
1. Hover over **Jobs** at the top of the page.
2. Click the stage you wish to view, such as **Pending** or **Complete**.
3. View job details as required. To find a specific job, enter a job number in the search bar and click **Search**.



To switch between **Pending**, **Progress**, **Complete**, **Invoiced** and **Archive** jobs, click the appropriate sub-tab.

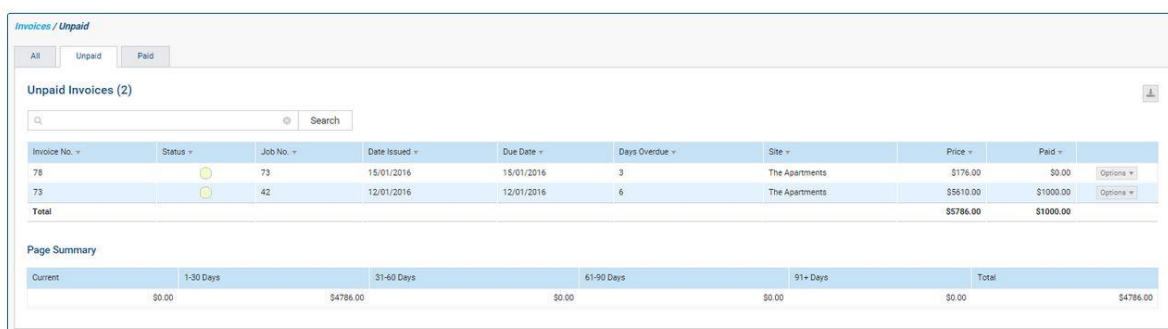
To print a job, click **Options > Print Job**.

## ▼ View invoices



To view invoices:

1. Hover over **Invoices** at the top of the page.
2. Click **Unpaid** or **Paid**, depending on the invoices you wish to view.
3. View invoice details as required. To find a specific invoice, enter an invoice or job number in the search bar and click **Search**.



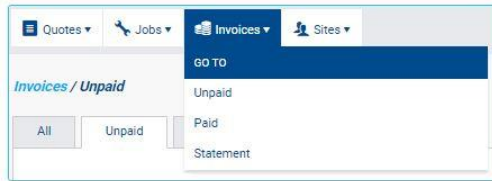
To switch between **All**, **Unpaid** and **Paid** invoices, click the appropriate sub-tab.

To print an invoice, click **Options > Print Invoice**.

To download a spreadsheet of invoice details, click the  icon in the top right corner, then click **CSV**.

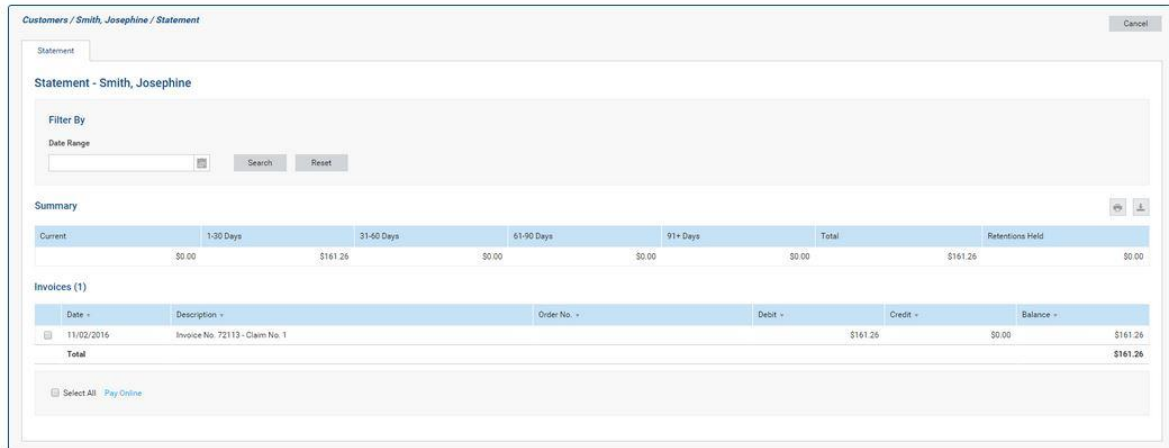
The **Page Summary** displays a summary of balance outstanding.

## ▼ View account statement



To view your account statement:

1. Hover over **Invoices** at the top of the page.
2. Click **Statement**.
3. View statement details as required.



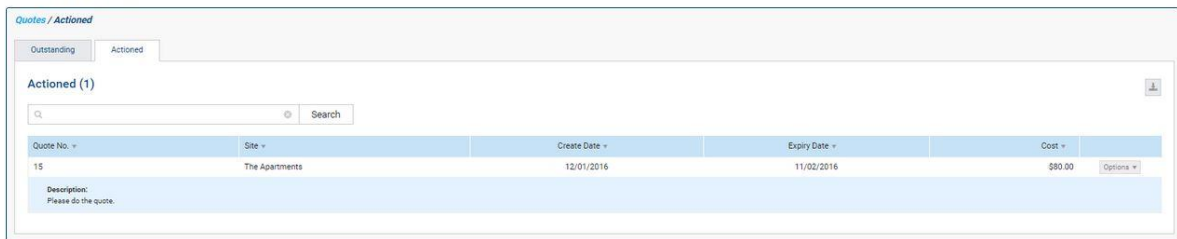
To narrow results to a specific timeframe, use the **Date Range** date picker and click **Search**.

To print your statement, click **Print Statement** at the bottom of the page.

To download a spreadsheet of statement details, click the  icon in the top right corner, then click **CSV**.

## ▼ Check quote status

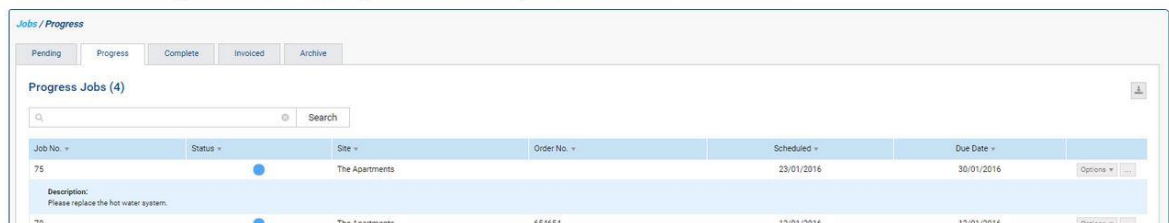
After you have requested a quote, go to **Quotes > Outstanding** to view it. Once we have reviewed and actioned the quote, it will appear under **Quotes > Actioned** instead, with the estimated **Cost** included.



Once a quote has been approved, you can add attachments if required by clicking **Options > Attachments**.

## ▼ Check job status

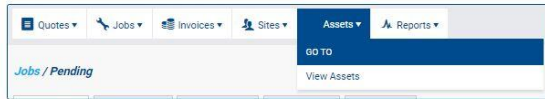
After you have booked a job, go to **Jobs > Pending** to view it. Once we have scheduled the job, it will appear under **Jobs > Progress Jobs** instead, and will displayed the **Scheduled** date. If you hover over its **Status**, you will see it has changed from 'Job : New Service' to 'Job : In Progress'. After the job is complete it will appear under **Jobs > Complete**; after it has been invoiced it will appear under **Jobs > Invoiced**; and after the invoice is paid it will be listed under **Jobs > Archive**.



### ▼ View assets


View detailed information about your assets, including service and transfer history, and request a quote or book a job directly from an asset requiring maintenance to automatically assign it to the quote / job.

Assets are grouped by site and asset type.



To view assets and their service and transfer history:

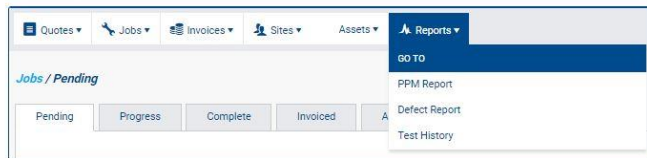
1. Hover over **Assets** at the top of the page.
2. Click **View Assets**.
3. Click the **Site** you wish to view assets for.
4. Assets are grouped by type. Scroll to find the asset, or enter an asset number into the **search bar** and click **Search**.
5. Click the asset. It will open in a pop-up window.
6. View the **Service History** details as required.
7. Click the **Transfer History** tab to view transfer information as required.
8. When you have finished, close the window by clicking the X in the top right corner.

To download a list of asset details, click the  icon in the top right and click CSV.



### ▼ View reports

Find out more detailed information about your assets by viewing reports. Reports include the **Programmed Preventative Maintenance Report**, the **Defect Report**, and the **Test History Report**.



To view reports:

1. Hover over **Reports** at the top of the page.
2. Click the report you wish to view.
3. Filter results by selecting options from the drop-down lists.
4. Click **Search**.
5. View report results as required.

To download report details, click the  icon in the top right corner of the report.

## 2. Asset List

Please refer to the attached spreadsheet

After the first service a full F Gas register will be provided where applicable.

Assets (1) 

Asset ID	Contract	Site	Customer(s)	Type	Walk Order	Start Date	Current Test Result	Last Test Date	Last Test Service Level	Location	Serial No.	Make	Model	Refrigerant Type	Refrigerant Weight	Building	Floor Served	Asset Name	CO2 Equivalent in Tonnes	Refrigerant GWP	Options
11773		DBS Dummy - AC	DBS - Dummy	AC Condensing Unit	0	14/11/2018	Fail	14/11/2018		Roof	1353511	Mitsubishi	PUH147085	R407C	10		1st	ACU-1	25	150	

## 3. Maintenance Programme

Please refer to the attached spreadsheet

### Service Schedules

Each service will be carried out to the service schedules as listed. All this will be entered onto our Simpro Data Base. [www.simpro.com](http://www.simpro.com)

- Simpro Database
- Asset Numbering
- Asset Condition Status
- Asset Service History
- Asset Call-Out History
- Asset Remedial History

All asset service reports are configurable to match each clients needs.

Asset Register - Screw Chiller (Circuit)										
Asset ID	Location	Building	Asset Name	Manufacturer	Model	Serial No.	Date	Service	Pass / Fail	
5615	Basement Plant Room	Old Bailey	Chiller No.1 Circuit A	Carrier	30HXC185-0001-E	12L621937	02/11/2018	Annually	Pass	
Test Readings	Condenser Air / Water On (oC): 22.4°C			Condenser Air / Water Off (oC): 26.1°C			Evaporator Air / Water On (oC): 15.5°C			
	Evaporator Air / Water off (oC): 13.8°C			Suction Pressure: 2.3bar			Suction Temperature: 16.5°C			
	Oil Pressure: 5.6bar			Oil Temperature:			Discharge Pressure: 72.1bar			
	Discharge Temperature: 49.2°C			Compressor Amps Brown: 87.7			Compressor Amps Black: 87.8			
	Compressor Amps Grey: 92.8			Compressor Run Hours: 1714			Q/Q Load: 100			
	Oil Failure Switch:			Control Thermostat: Pass			Flow Switches: Pass			
	Safety Interlocks: Pass			Condenser Fan Control:			Wiring Condition / Tightness: Pass			
	Condition of Contactors and Relays: Pass			Condition of Fans / Belts / Bearings:			Condition of Condenser: Pass			
	Condition of Evaporator: Pass			Sight Glass Indicator: Pass			Liquid Line Driers:			
	Refrigerant Charge: Pass			Mandatory Plant Leak Test: Pass			Precautionary Acid Test: Pass			
	Are the Wiring Diagram on site: Yes			Is the plant clearly identified: Yes			Is the site clear of Cylinders: Yes			
	Is the Controller information available on site?: Yes			Is the site clear of rubbish: Yes			Are further works required?: Yes			
	Alarm History:			Condition: Exceeded Life Cycle			Engineer Comments:			
	Notes									
Nearly on all off the chillers there seems to be a number of low oil pressure faults this circuit has not had the oil filters replaced since 2010I would advise these be replaced.										
5616	Basement Plant Room	Old Bailey	Chiller No.2 Circuit A	Carrier	30HXC185-0001-E	12L621936	02/11/2018	Annually	Pass	
Test Readings	Condenser Air / Water On (oC): 22.4			Condenser Air / Water Off (oC): 26.6			Evaporator Air / Water On (oC): 15.8			
	Evaporator Air / Water off (oC): 13.6			Suction Pressure: 2.02bar			Suction Temperature: 15.2°C			
	Oil Pressure: 8.66bar			Oil Temperature:			Discharge Pressure: 9.37bar			
	Discharge Temperature: 55.5°C			Compressor Amps Brown: 101.9			Compressor Amps Black: 103.0			
	Compressor Amps Grey: 109.2			Compressor Run Hours: 17791			Q/Q Load: 100			
	Oil Failure Switch:			Control Thermostat: Pass			Flow Switches: Pass			
	Safety Interlocks: Pass			Condenser Fan Control:			Wiring Condition / Tightness: Pass			
	Condition of Contactors and Relays: Pass			Condition of Fans / Belts / Bearings:			Condition of Condenser: Pass			
	Condition of Evaporator: Pass			Sight Glass Indicator: Pass			Liquid Line Driers:			
	Refrigerant Charge: Pass			Mandatory Plant Leak Test: Pass			Precautionary Acid Test:			