TSH-LEARN-2026-11-09.1 | Version 1

LEARNING GUIDE - NO OPERATIONAL APPROVAL

Complete onboarding programme

TeroSmartHub complete onboarding programme

Your complete TeroSmartHub onboarding programme. Start with one property, one asset and one task. Examples are never automatically added to your workspace. Use only the controls permitted by your role. Some action journeys are still under review; check every saved result and contact support if a control differs.

Revision 2026-11-09.1. Full operational acceptance verified: not yet - follow the visible interface and confirm saved records.

Searchable guide and learning preferences

Residential

A home/apartment, its rooms, air conditioners, heaters and water supply.

Supported classes: Estate / gated community; Residential compound; Detached residence / mansion; Apartment building; Bungalow / cottage; Home / room

1 Your home and first air conditioner

Sign in, select or register a home, then record the first bedroom AC using existing controls.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and check whether your home already exists. If missing and your role permits, use Add facility or asset, choose Home, then Continue to details.

- Enter Name (required), the actual Property / asset class and Location / address (optional). Room counts are not separate required fields in this form.

- Select Save & open dashboard and wait for Saved successfully. Choose Go to my dashboard.

- Continue with the Bedroom 1 AC record in Reports Output studio using the equipment lessons below. If asset registration controls are unavailable, retain the property record and contact your manager.

Example only: My Family Apartment; a newly completed two-bedroom apartment with two bathrooms. Bedroom 1 Air Conditioner is separate from Bedroom 2 Air Conditioner. These records are never created for you.

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Bedroom 1 bathroom

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Water-heater label; Room overview; Accessible fittings photographs

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Example only: Bedroom 1 Water Heater; WC, basin, shower and valves grouped as Bedroom 1 Plumbing where that level of detail suits the maintenance plan.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Bedroom 2 and bathroom

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Second bedroom overview; Actual AC and heater labels

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Example only: Bedroom 2 Air Conditioner and Bedroom 2 Water Heater. Preserve separate locations and identities even when models match.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

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4 Living room

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Overview and actual installed-item labels

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Example only: Living Room Air Conditioner, ceiling fan where installed, lighting and electrical controls. Group simple fittings sensibly.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

5 Kitchen

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Manuals and warranties; Actual appliance labels; Accessible plumbing photographs

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those

columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Example only: refrigerator, extractor, cooker/oven and dishwasher where installed. Keep receipts, warranty dates and repair history with the actual item.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

6 Water supply

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Pump label; Tank information; Accessible system photographs

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Example only: Water Pump 01, storage tank capacity where known, treatment unit, important valves and pressure controls. Readings are manual unless a verified integration exists.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

7 Generator and electrical distribution

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Generator label and service book; Safe external board photograph

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Example only: generator manufacturer, model, serial, rated capacity, fuel type, location and recorded operating hours. Use the existing utility/maintenance records where available.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Never open energised equipment or perform tests without the required competence and isolation. Refer electrical inspection to a qualified person. Unknown readings remain unknown.

8 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

- Mark missing handover records honestly; missing files do not prevent using other features.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

9 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

Fleet & Transport

Three vehicles with unique identities, authorised users, inspections, servicing and renewal dates.

Supported classes: Vehicle fleet; Individual vehicle; Car / passenger vehicle; Bus / minibus fleet; Truck / commercial vehicle fleet; Motorcycle fleet

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: Vehicle fleet; Individual vehicle; Car / passenger vehicle; Bus / minibus fleet; Truck / commercial vehicle fleet; Motorcycle fleet.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

Three vehicles with unique identities, authorised users, inspections, servicing and renewal dates.

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Register the asset identity

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Actual manufacturer/model/serial; Location and meter readings

Where to go: Tero Assets Save asset details Save asset changes Save media + note

- Select the existing context. Open Tero Assets and review Your asset record before creating duplicates.

- Enter the actual name, Manufacturer / brand and the supported model, serial and specification fields. Location belongs in Property / asset profile & contacts; condition belongs in inspections.

- Select Save asset details (or Save asset changes). Wait for Asset baseline saved.

- Under Guided asset capture, choose one image/video, describe What does this media show?, and select Save media + note. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to this context and reopen the identity and evidence. Multiple component assets use the existing controlled asset register.

Three vehicles with unique identities, authorised users, inspections, servicing and renewal dates.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

- Mark missing handover records honestly; missing files do not prevent using other features.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register. Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains required.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

- Use the edit/review controls only if permitted. Keep the version, evidence and approval state clear.

- Open the authorised export with the displayed opening instructions. Reopen the saved version and confirm content.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

Plant, Equipment & Tools

An excavator, generator or pump, its duty, meter readings and approved maintenance.

Supported classes: Heavy plant / earthmoving equipment; Construction equipment; Pump / generator / powered equipment; Tools / scaffold / materials inventory; General asset portfolio; Single equipment asset

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

LEARNING GUIDE - NO OPERATIONAL APPROVAL

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: Heavy plant / earthmoving equipment; Construction equipment; Pump / generator / powered equipment; Tools / scaffold / materials inventory; General asset portfolio; Single equipment asset.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

An excavator, generator or pump, its duty, meter readings and approved maintenance.

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Register the asset identity

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Actual manufacturer/model/serial; Location and meter readings

Where to go: Tero Assets Save asset details Save asset changes Save media + note

- Select the existing context. Open Tero Assets and review Your asset record before creating duplicates.

- Enter the actual name, Manufacturer / brand and the supported model, serial and specification fields. Location belongs in Property / asset profile & contacts; condition belongs in inspections.

- Select Save asset details (or Save asset changes). Wait for Asset baseline saved.

- Under Guided asset capture, choose one image/video, describe What does this media show?, and select Save media + note. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to this context and reopen the identity and evidence. Multiple component assets

use the existing controlled asset register.

An excavator, generator or pump, its duty, meter readings and approved maintenance.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

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3 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

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4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

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Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register. Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains required.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

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6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

- Use the edit/review controls only if permitted. Keep the version, evidence and approval state clear.

- Open the authorised export with the displayed opening instructions. Reopen the saved version and confirm content.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

Commercial & Retail

Offices, tenant zones, malls, HVAC, electrical and shared services.

Supported classes: Office building; High-rise commercial building; Shopping mall / retail centre; Market / retail premises; Mixed-use commercial building

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: Office building; High-rise commercial building; Shopping mall / retail centre; Market / retail premises; Mixed-use commercial building.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

Offices, tenant zones, malls, HVAC, electrical and shared services.

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Register equipment and systems

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Actual installed equipment labels; Location/hierarchy and condition evidence

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a

unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Offices, tenant zones, malls, HVAC, electrical and shared services.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

- Mark missing handover records honestly; missing files do not prevent using other features.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register. Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains required.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

- Use the edit/review controls only if permitted. Keep the version, evidence and approval state clear.

- Open the authorised export with the displayed opening instructions. Reopen the saved version and confirm content.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload

another customer's records into this property.

Hospitality

Guest-area condition, hospitality equipment, kitchens where recorded, water hygiene and building safety

Supported classes: Hotel / motel; Resort / serviced accommodation; Restaurant / hospitality venue; Event / hospitality facility

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: Hotel / motel; Resort / serviced accommodation; Restaurant / hospitality venue; Event / hospitality facility.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

Guest-area condition, hospitality equipment, kitchens where recorded, water hygiene and building safety

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Register equipment and systems

Identify one installed item, record its actual information and retrieve the saved evidence.

LEARNING GUIDE - NO OPERATIONAL APPROVAL

What you need: Actual installed equipment labels; Location/hierarchy and condition evidence

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Guest-area condition, hospitality equipment, kitchens where recorded, water hygiene and building safety

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

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Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register. Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains required.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

- Use the edit/review controls only if permitted. Keep the version, evidence and approval state clear.

- Open the authorised export with the displayed opening instructions. Reopen the saved version and confirm content.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

Education

A school: classrooms, generator, water systems and safety-related assets.

Supported classes: School; College / university campus; Training centre; Hostel / student accommodation

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: School; College / university campus; Training centre; Hostel / student accommodation.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

A school: classrooms, generator, water systems and safety-related assets.

Save and check: Reopen Properties & contexts, select the saved home, and check the

name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Register equipment and systems

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Actual installed equipment labels; Location/hierarchy and condition evidence

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

A school: classrooms, generator, water systems and safety-related assets.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and

commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

- Mark missing handover records honestly; missing files do not prevent using other features.

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Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

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4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register. Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains required.

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Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

- Use the edit/review controls only if permitted. Keep the version, evidence and approval state clear.

- Open the authorised export with the displayed opening instructions. Reopen the saved version and confirm content.

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Healthcare

A hospital/clinic: critical power, water and clinical-support assets under competent technical control.

Supported classes: Hospital / clinic; Healthcare laboratory; Medical centre / care facility

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: Hospital / clinic; Healthcare laboratory; Medical centre / care facility.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

A hospital/clinic: critical power, water and clinical-support assets under competent technical control.

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Register equipment and systems

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Actual installed equipment labels; Location/hierarchy and condition evidence

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

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Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Documents and warranties

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What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

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4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register. Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains

required.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

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Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

Industrial & Logistics

Production-support equipment, shutdowns, utilities and safe operating duties.

Supported classes: Industrial production facility; Factory / processing plant; Warehouse / logistics centre; Workshop / depot; Data centre / telecom facility

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: Industrial production facility; Factory / processing plant; Warehouse / logistics centre; Workshop / depot; Data centre / telecom facility.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

Production-support equipment, shutdowns, utilities and safe operating duties.

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Register equipment and systems

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Actual installed equipment labels; Location/hierarchy and condition evidence

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a

photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Production-support equipment, shutdowns, utilities and safe operating duties.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

- Mark missing handover records honestly; missing files do not prevent using other features.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload

another customer's records into this property.

4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register.

Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains required.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

- Use the edit/review controls only if permitted. Keep the version, evidence and approval state clear.

- Open the authorised export with the displayed opening instructions. Reopen the saved version and confirm content.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

Infrastructure & Utilities

A drainage route, road/chainage, culvert or utility network and its observed condition.

Supported classes: Road / highway corridor; Bridge / transport structure; Drainage / flood-control network; Water / wastewater network; Power / public-lighting network; Rail / port / airport infrastructure

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: Road / highway corridor; Bridge / transport structure; Drainage / flood-control network; Water / wastewater network; Power / public-lighting network; Rail / port / airport infrastructure.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

A drainage route, road/chainage, culvert or utility network and its observed condition.

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Register equipment and systems

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Actual installed equipment labels; Location/hierarchy and condition evidence

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review

and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

A drainage route, road/chainage, culvert or utility network and its observed condition.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

- Mark missing handover records honestly; missing files do not prevent using other features.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register. Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains required.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

- Use the edit/review controls only if permitted. Keep the version, evidence and approval state clear.

- Open the authorised export with the displayed opening instructions. Reopen the saved version and confirm content.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

Government & Civic

Public-building continuity, accessibility, occupancy, statutory controls and building services

Supported classes: Government office / public building; Civic centre / public-service building; Court / administrative complex; Community facility

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: Government office / public building; Civic centre / public-service building; Court / administrative complex; Community facility.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

Public-building continuity, accessibility, occupancy, statutory controls and building services

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written

automatically.

2 Register equipment and systems

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Actual installed equipment labels; Location/hierarchy and condition evidence

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Public-building continuity, accessibility, occupancy, statutory controls and building services

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

- Mark missing handover records honestly; missing files do not prevent using other features.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register. Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains required.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and

commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

- Use the edit/review controls only if permitted. Keep the version, evidence and approval state clear.

- Open the authorised export with the displayed opening instructions. Reopen the saved version and confirm content.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

Mixed-use & Estate Portfolio

Estate buildings, shared infrastructure, common services and service requests.

Supported classes: Mixed-use estate / development; Estate / gated community; Multi-building property portfolio

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: Mixed-use estate / development; Estate / gated community; Multi-building property portfolio.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

Estate buildings, shared infrastructure, common services and service requests.

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Register equipment and systems

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Actual installed equipment labels; Location/hierarchy and condition evidence

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval and permanent ID assignment remain subject to the existing controls.

Estate buildings, shared infrastructure, common services and service requests.

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

- Mark missing handover records honestly; missing files do not prevent using other features.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A

saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register. Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains required.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder

delivery from a calendar export. Escalate unsafe conditions to a competent person.

6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

- Use the edit/review controls only if permitted. Keep the version, evidence and approval state clear.

- Open the authorised export with the displayed opening instructions. Reopen the saved version and confirm content.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

Recreation, Culture & Faith

Assembly safety, activity-specific amenities, water quality where relevant, grounds and building systems

Supported classes: Church / mosque / worship facility; Cultural / community venue; Sports / recreation facility; Swimming pool / leisure facility; Beach / outdoor recreation area

1 Choose the correct workspace

Select or register the appropriate property/asset context before recording its equipment.

What you need: A verified email address; Actual property name and address; AC label and photographs

Where to go: Create Free Account Sign In Add facility or asset Continue to details Name (required) Property / asset class Location / address (optional) Save & open dashboard

- New user: select Create Free Account, verify your email and finish the required account

details. Returning user: select Sign In and open your existing workspace. Never share the code.

- Open Properties & contexts and look for the existing record. If missing and permitted, use Add facility or asset. Choose the appropriate context, then Continue to details.

- Enter Name (required), the actual Property / asset class, Location / address (optional) and the appropriate sector under More setup options. Available classes: Church / mosque / worship facility; Cultural / community venue; Sports / recreation facility; Swimming pool / leisure facility; Beach / outdoor recreation area.

- Select Save & open dashboard, wait for Saved successfully, then Go to my dashboard. Reopen the context before continuing.

Assembly safety, activity-specific amenities, water quality where relevant, grounds and building systems

Save and check: Reopen Properties & contexts, select the saved home, and check the name/address. Reopen the asset register and AC photographs separately.

Common mistakes: Do not register an existing property again. No sample details are written automatically.

2 Register equipment and systems

Identify one installed item, record its actual information and retrieve the saved evidence.

What you need: Actual installed equipment labels; Location/hierarchy and condition evidence

Where to go: Reports Output studio Generate complete asset-based document pack Edit, review and approve

- Choose the correct property using Properties & contexts. Review existing assets before adding another record.

- Open Reports Output studio. Review the saved asset register before generating a missing draft. Generating a document pack does not itself confirm the equipment exists.

- Open the working asset register using its edit control. In the existing table, record a unique asset name, actual room/location, model, serial, rating and condition where those columns are supported. Leave unknown information honest. Do not replace an existing asset ID.

- In Plans & data, select Document basis, describe the file in Upload note, then use Add a photo, video, voice note, drawing or document. Caption the room, item and nameplate. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Return to the register. Wait for All changes saved. Review the saved version; approval

and permanent ID assignment remain subject to the existing controls.

Assembly safety, activity-specific amenities, water quality where relevant, grounds and building systems

Save and check: Navigate away and reopen the same register and source files. Confirm the item, location and evidence. A self-reported learning acknowledgement is not verification of an asset or inspection.

Common mistakes: Do not merge similar items from different rooms, invent serial numbers, duplicate IDs or assume a photograph confirms hidden condition. If editing is unavailable, ask your authorised manager.

3 Documents and warranties

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Storage & files File purpose Choose file View file Download Refresh files

- Choose the correct property and open Storage & files.

- Select File purpose, then Choose file. Use a descriptive filename that identifies the room/item and document revision.

- Wait for the storage result. Follow the limit shown by the upload control: photos and other supported files up to 25 MB; MP4/MOV/WebM up to 1 GB, within the workspace allowance. Keep the page open, wait for success, then reopen the saved file. An upload does not establish professional approval.

- Select Refresh files, find the saved item, then View file or Download. In Plans & data, Upload note can record a caption before selecting a source file.

- Mark missing handover records honestly; missing files do not prevent using other features.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

4 Maintenance, faults and work history

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Maintenance Work orders Reports Output studio

- Open Maintenance for the selected property and existing asset. Review recorded requirements and any proposed PPM first.

- Use the scheduling controls shown to your role. Enter a future date, confirm recurrence and review before saving. Do not activate an unreviewed schedule.

- Navigate away and reopen the schedule. Compare the saved next date and recurrence. A saved schedule is not proof of reminder delivery.

- Report a fault through the available inspection/service/work controls. Check the same facility and asset identity, and attach actual observations and evidence. If a Fault Gallery destination is absent, use the existing authorised workflow.

- Follow scope quotation review approval work order execution inspection closure. Reporting a problem does not approve spend, assign a contractor or authorise payment.

- Record actual work, approved costs where permitted and before/after evidence. Retrieve the completed work and controlled report.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

5 Inspection and close-out evidence

Follow the controlled maintenance and repair journey for an existing asset.

What you need: Existing asset ID; Manufacturer service guidance; Reviewed future due date; Actual defect/work evidence

Where to go: Inspection register Inspection month Monthly inspection checklist Inspection result Reading / result

- Open the inspections module for the selected context and review the Inspection register. Choose the correct Inspection month and existing Monthly inspection checklist.

- Select the existing asset in Asset-by-asset field checklist. Check its location and identity before recording an Inspection result.

- Record actual Reading / result, observations and supported evidence. A pending inspection does not mean satisfactory condition.

- Use the displayed save/review controls, then reopen the same checklist and asset to check persistence. Follow the controlled defect/work close-out process; competent review remains required.

Example only: Bedroom 1 AC service, on a future date reviewed by the owner. Do not use sample dates as real schedules.

Save and check: Reopen the same schedule and work record. Check actual status, dates, evidence and costs; confirm reminder delivery using recorded provider/inbox evidence.

Common mistakes: Do not mark work complete because a task exists, or assume reminder delivery from a calendar export. Escalate unsafe conditions to a competent person.

6 Controlled reports and history

Store and retrieve available drawings, manuals, warranties and handover records.

What you need: Available drawings/as-builts; Manuals; Warranties, receipts and commissioning records

Where to go: Reports Output studio Edit, review and approve

- Open Reports Output studio for the correct context.

- Review saved source files and the selected report. A generated draft is not approval.

- Use the edit/review controls only if permitted. Keep the version, evidence and approval state clear.

- Open the authorised export with the displayed opening instructions. Reopen the saved version and confirm content.

Example only: Bedroom-1-AC-Warranty.pdf; Building-Handover-Record.pdf. Keep the approved revision.

Save and check: Navigate away, return, find and open the same saved file. Verify the content rather than relying on its filename.

Common mistakes: Uploading a document is not professional verification. Never upload another customer's records into this property.

Best regards, TeroSmartHub team TeroSmartHub(TM) is a product of SITEHUB ENGINEERING AND CONSTRUCTION NIGERIA LIMITED RC 1796686 terosmarthub.com @TeroSmartHub Step-by-step guide Video guidance channel

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LEARNING GUIDE - NO OPERATIONAL APPROVAL

TeroSmartHub learning programme

Educational instructions only. Check saved records in your authorised workspace.

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