

# AI Cheatsheet

## XOi Generated Work Summary



Using XOi + AI, creating a summary of work completed on site is easy. As a tech completes workflow steps in XOi, they enter in workflow responses in the form of short text, yes/no questions, multiple choice, date, number, or step notes. Using these simple responses, AI can create a clear, comprehensive work summary instantly.

### AI Work Summary Output

The screenshot shows a mobile application interface for a service call workflow. The title bar reads 'XOi Service Call Workflow'. The form contains several sections: 'What is the unit id or name?' with the input 'RTU 6'; 'Was the unit operating on arrival?' with a 'No' selection; 'What was the root cause of the problem?' with two selected options: 'Failed fan motor' and 'Airflow issue'; 'The following parts had issues but were addressed and are now operating normally' with 'Capacitor' selected; 'Is there any additional work that needs to be quoted?' with a 'Yes' selection and a text input 'The fan motor needs to be replaced.'; 'What is the quote amount for the additional work' with the input '478.89 Dollars'; 'Was the unit operating on departure?' with a 'No' selection; and 'If the unit was not running upon departure, when will you return to fix the remaining issues?' with the input 'Friday, September 22, 2023'.

Today, I visited the job site to address the issues with RTU 6. Upon arrival, I found that the unit was not operating. After conducting a thorough inspection, I determined that the root cause of the problem was a failed fan motor and an airflow issue.

During my assessment, I also identified some additional parts that had issues. However, I was able to address these problems, and they are now operating normally. Specifically, the capacitor was repaired and is functioning as expected.

Moving forward, there is still some additional work that needs to be quoted. The fan motor will need to be replaced, and the quote amount for this additional work is \$478.89.

Upon departure, the unit was still not running. To ensure that all remaining issues are resolved, I will return on September 22, 2023, to fix the remaining problems.

Thank you for allowing me to assist with the maintenance and repair of RTU 6. If you have any further questions or concerns, please do not hesitate to reach out.



Image of dataplate



What is the unit ID or name?

CU 12

Was the unit operating on arrival?

Yes

Did the customer indicate any issues or concerns regarding the operation of the system?

- Concerns about air quality
- Unit starts up and turns off quickly
- Energy bills are too high

The following parts presented concerns.

- Capacitor
- Filter
- UV light

The following was found to be out of tolerance based on manufacturer specifications.

- Subcool
- Liquid line / High side pressure
- Capacitor microfarads

The following parts had issues but were addressed and are now operating as normal.

- Capacitor
- Filter
- UV light

Was the unit operating on departure?

Yes

## AI Work Summary Output

Today, I arrived at unit **CU 12** to evaluate and address any concerns the customer had with the system. Upon arrival, **the unit was operating**. The customer expressed concerns about **air quality**, as well as the **unit starting up and turning off quickly**, resulting in **high energy bills**.

After conducting a thorough inspection, I found that the **capacitor, filter, and UV light** presented issues and concerns. Additionally, the **subcool, liquid line/high side pressure, and capacitor microfarads** were found to be out of tolerance based on manufacturer specifications.

I addressed the issues with the **capacitor, filter, and UV light**, and all parts are now operating as **normal**.

Before leaving the job site, I ensured that the **unit was fully functioning**. It was operating correctly and without any issues. If the customer has any further concerns or questions, they should not hesitate to reach out to us.