Angus AnyWhere®

Service Portal

User Guide

Getting Started

About the Service Portal

Your property management company has provided a self-service, web interface known as a Service Portal. This interface allows you to enter and track service requests. In addition, your Service Portal may include Resource Reservations and Visitor Security.

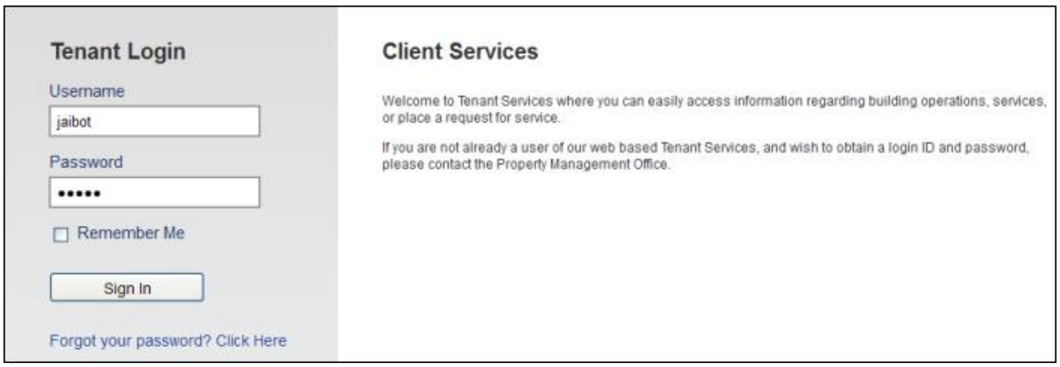
Your property management company will provide a web address, user name and password for using your Service Portal.

Please note that the images included here are for instructional purposes only; depending on how the Service Portal has been configured, the interface may not necessarily appear exactly as depicted.

Logging In

i After logging in, users who are inactive for 60 minutes will be automatically logged out.

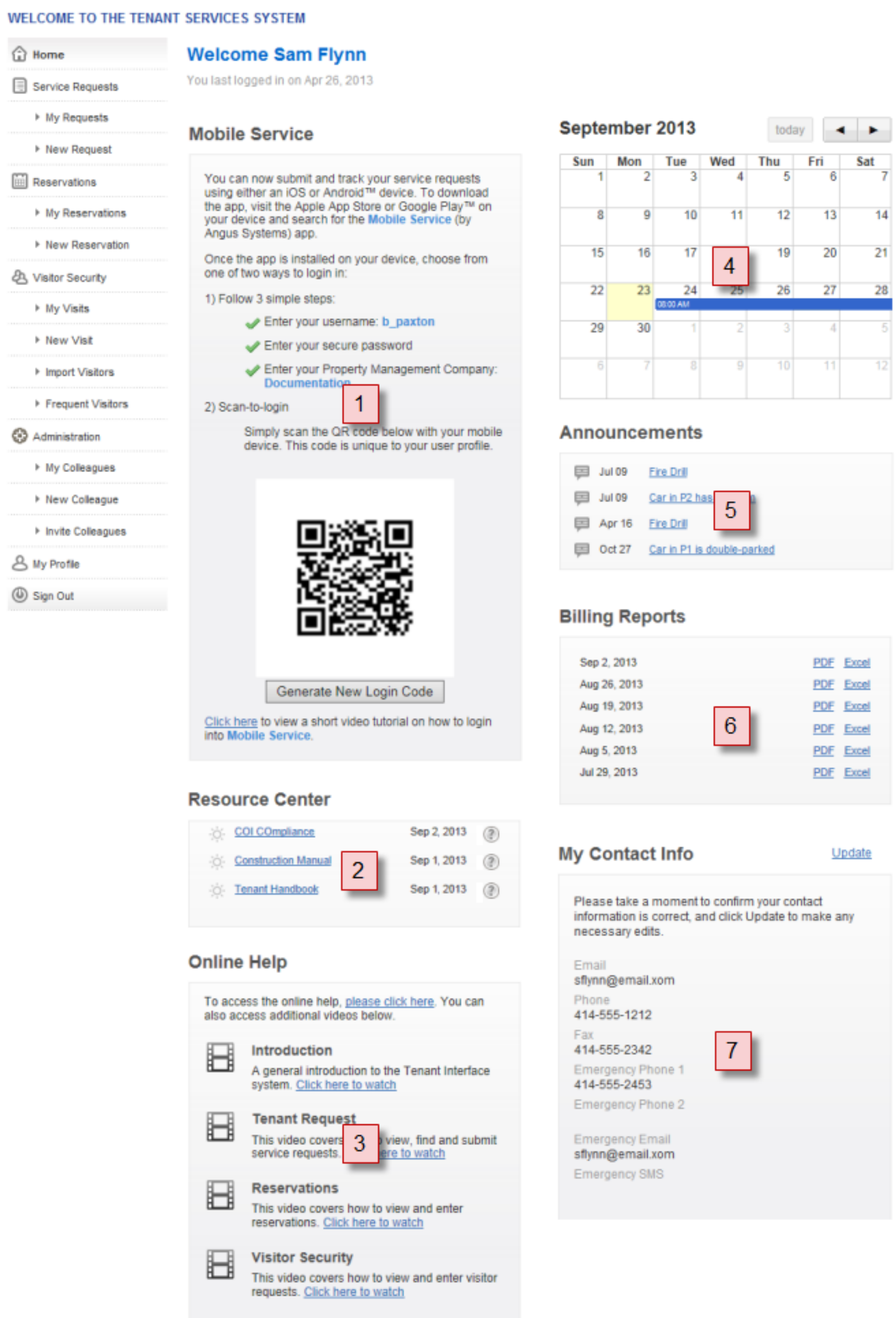
1. Open a web browser and enter the web address to your Service Portal, as provided by your property management company. The Login screen is displayed.
2. Click the **Username** field and enter your user name.
3. Click the **Password** field and enter your password.
4. If you would like the site to remember your user name and password, place a checkmark beside **Remember Me**.
5. Click **Sign In**.



The Home Page

> *i* Depending on how your Service Portal has been configured, as well as your level of access, some features described below may not be available, or their exact positioning on the page may be different than shown below.

A variety of features and functions can be made available on the Service Portal's home page, which is displayed by default after logging in. A description of each numbered section can be found below.



1. **Mobile Service:** This panel provides manual and QR code login information for the Mobile Service application. If this application has been enabled by Property Management, then this panel will be displayed. For additional information on downloading, installing and using the Mobile Service application on your iOS or Android™ mobile device, please refer to The Mobile Service Application topic and associated topics in this section.
2. **Resource Center:** the Resource Center displays a collection of documents that your property manager has made available to tenants, such as Certificate of Insurance (COI) Compliance and Tenant Handbooks outlining general policies and procedures. Click on a document name to view it.
3. **Online Help:** The Online Help section provides a link to this help system, as well as links to video tutorials which provide information on performing specific tasks within your Service Portal.
4. **Events Calendar:** the Events Calendar displays property events which may span multiple days, such as construction activities that may temporarily restrict building access. Clicking on an event marked on the calendar displays additional details.
5. **Announcements:** from time to time, your property management office may issue announcements concerning upcoming building-related events or other important information. These announcements are displayed in this section. You can click on the links to display the full details of the announcement. If more than five announcements are available for viewing, then this widget will contain page links to view the additional announcements.
6. **Billing Reports:** The billing reports section provides links to view monthly summaries of billable tenant requests. These reports are generally available as both PDF and Microsoft Excel files (in some cases they may only be available in PDF format). Tenant Administrators can grant access to this feature to coworkers; see Modifying Colleagues for more information.

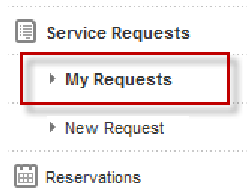
> *i* Contacts who can access all properties in a tenant group can use a drop-down list to select which tenant's billing reports to display.

7. **My Contact Info:** this section displays your current contact information. If any of this information is missing or incorrect, you can update this information using the **update** link provided in this section, or by accessing **My Profile** in the menu on the left. For more information, see Changing Your Profile.

Tenant Service Requests

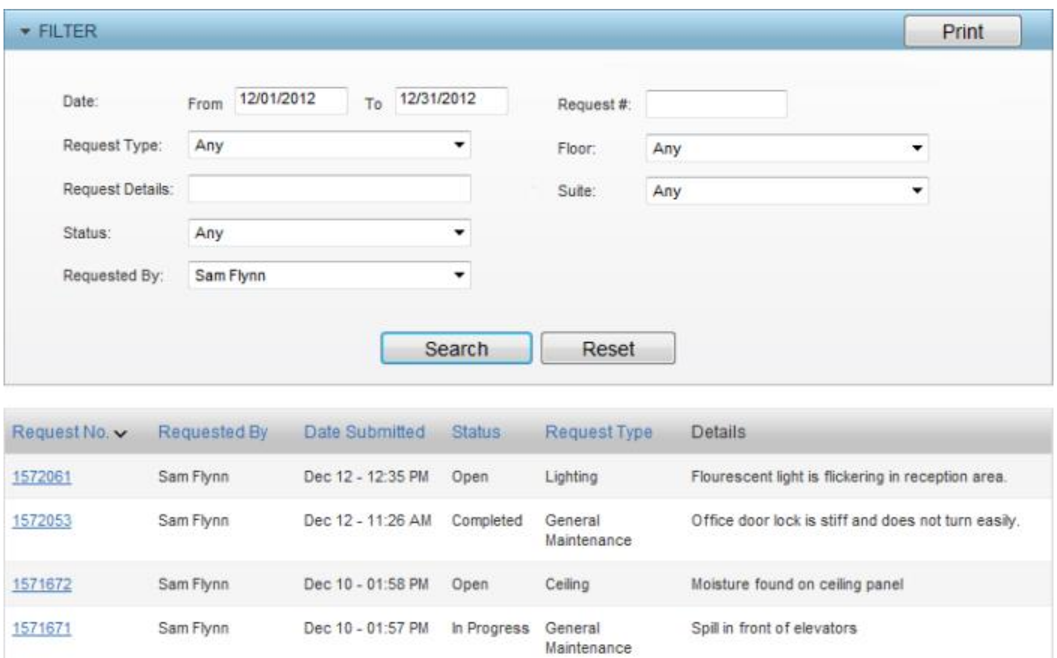
The My Requests List

The My Requests list allows you to view and search for service requests that have been made. A history section in the request's details tracks status updates to the service requests as they occur. To access the list, click on **My Requests** in the navigation bar to the left.



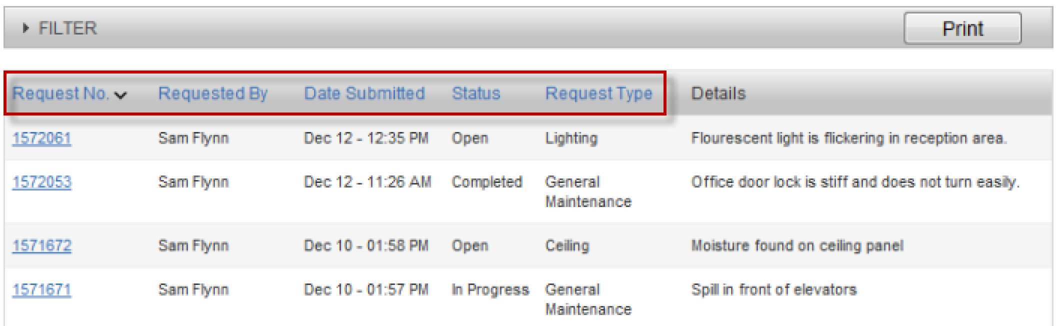
1. By default, the system displays requests submitted in the last 30 days, of any request type and any status. To make changes, click on the **Filter** section above the list if it is not already expanded. This will display a wide variety of filter options.

> *i* If you have access to view your colleagues' requests, set the **Requested By** filter to **Any** to view all requests.

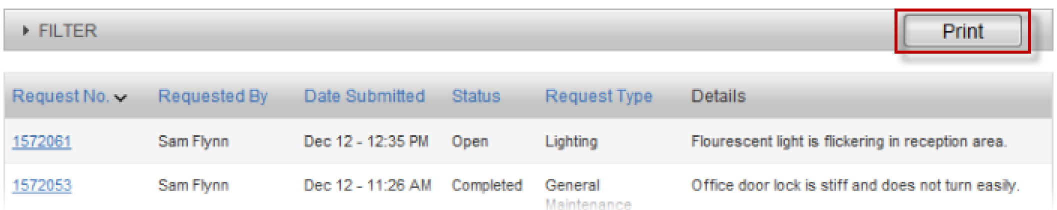


2. Use the dropdown menus to filter the list by Date, Request Type, Request Details, Status, Request Number, Floor or Suite.
   - If you have access to view your colleagues' requests, you will also see a **Requested By** dropdown.
3. Click the **Search** button. Requests matching the selected criteria are displayed on the My Service Requests screen.

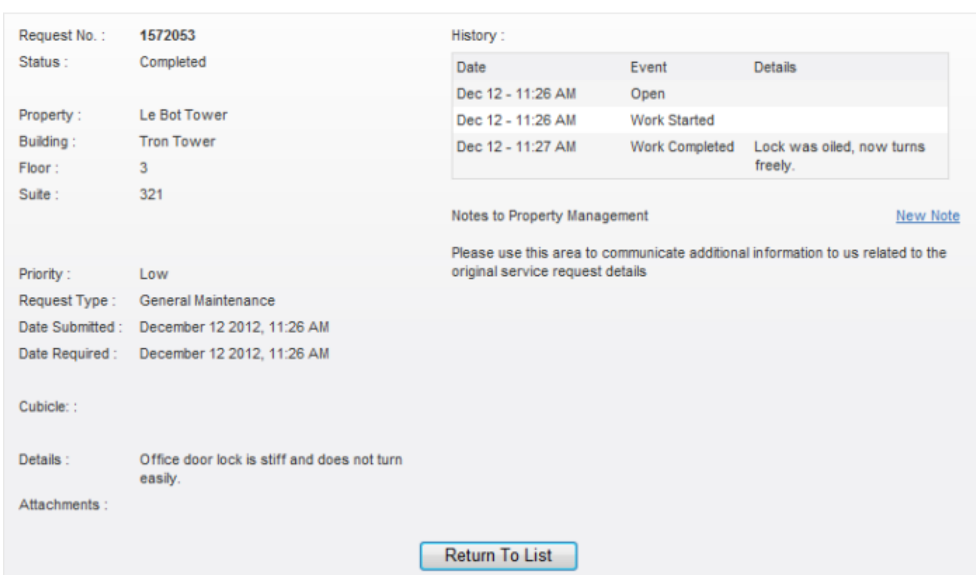
4. By default, the system organizes the Requests by Request Number in descending order (highest to lowest). You can sort the list by clicking on the following headings:
    - Request Number
    - Date Submitted
    - Status
    - Request Type



5. You can print a list by clicking the **Print** button.



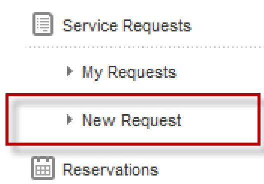
6. To view a request's details from this list, click the associated **Request Number**. The request details are displayed. If the Cancel Service Request feature is enabled, then under specific circumstances a service request can be canceled at your discretion. For additional details, see the Cancel Service Request topic.



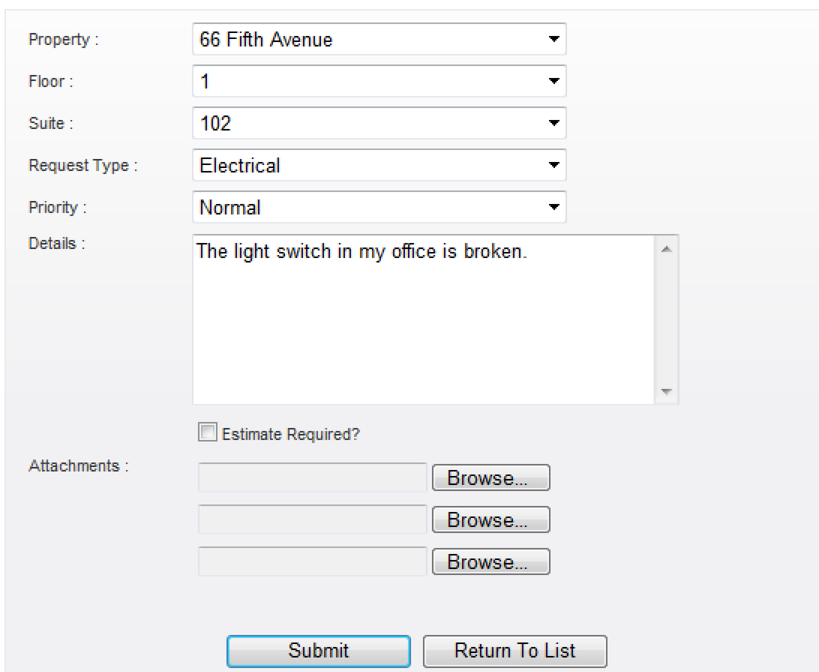
Making a Request

> *i* If you need to cancel a request and the [Cancel Service Request] feature is enabled, then under specific circumstances a service request can be canceled using the Service Portal. For additional details, see the [Cancel Service Request] topic.

Requests are submitted to report issues which require attention from your Property Management Company. To create a new request, Click **New Request** and then follow the steps outlined below.



1. The Service Request Entry screen is displayed.



2. If you have offices in more than one building and your tenancy has been set up to allow you to create requests for more than one property or building, the following additional fields may need to be filled in:
   - If your tenancy spans multiple properties, then the **Property** field will be displayed. Select the property for the service request.
   - If your tenancy is in more than one building on the same property, then the **Building** field will be displayed. Select the building for the service request.
3. Use the **Floor** and **Suite** drop-down lists to select a floor and suite.
4. Click the **Request Type** field and select a request type from the drop-down menu.

5. If your Property Management Company uses priority levels for requests (as shown above), use the **Priority** drop-down menu to select a priority.
6. Your Property Management Company may also require additional custom fields to be filled in. Enter the appropriate information in any additional fields which may be present.
7. Click the **Details** field and enter the details of the request.
8. Indicate if an estimate is required using the checkbox provided.
9. If there are any files you would like to attach to the request, such as pictures, PDFs, or other documentation which concerns the request, click **Browse...** and select the file you would like to attach.
    - You can attach a maximum of 3 files.
    - The combined size of all files attached cannot exceed 10MB.
    - After submitting your request, you cannot add, remove, or otherwise modify the attachments.
10. Click **Submit**. Your request is submitted and the Request Confirmation screen is displayed.

> *i* If your property uses the Authorization feature, your request may require authorization before it can be processed. The system will display a message informing you that authorization is required.

Cancel Service Request

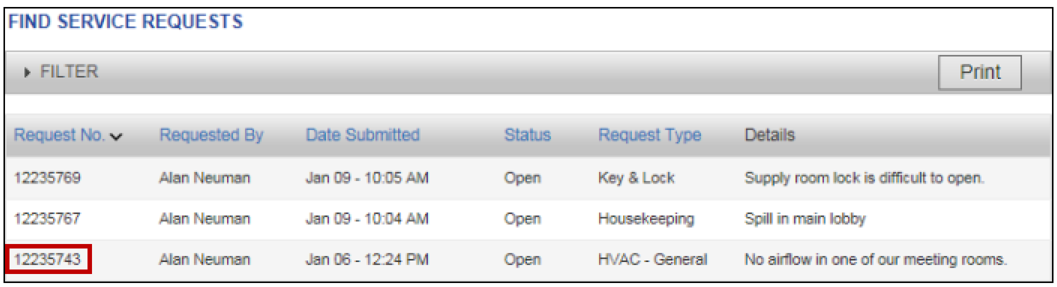
> If this feature is not enabled and you would like to cancel a request, you can request a cancellation by contacting your Property Management office.

If enabled, the Cancel Service Request feature allows tenants to cancel service requests under specific circumstances, as follows:

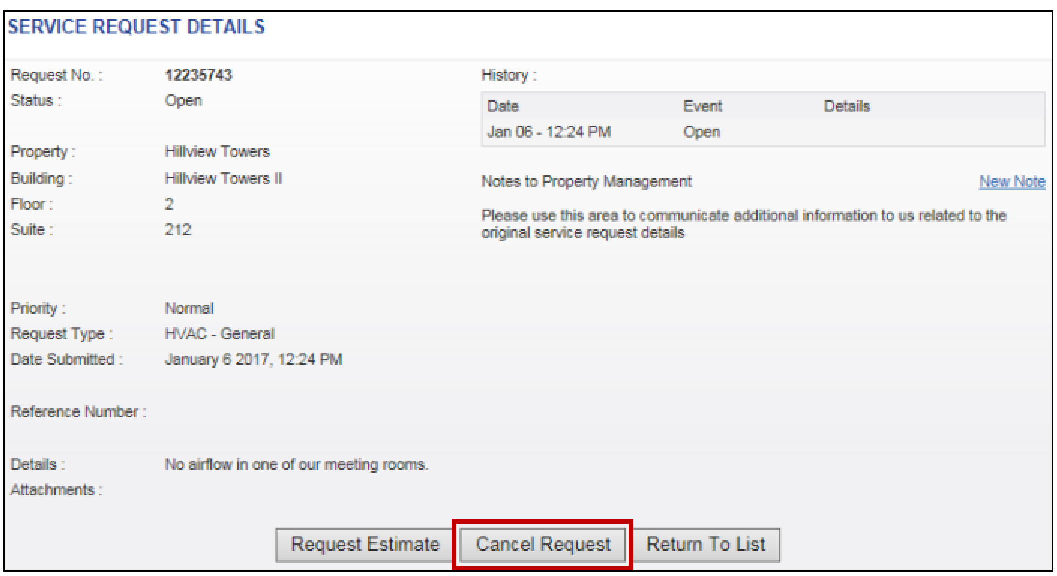
- The service request is open and does not have a **Work Started** event.
- The Service Request belongs to you.
- If Tenant Authorization is used, the service request has already been authorized by a Tenant Authorizer.

If the above criteria are met, then you can cancel the service request by following the steps below:

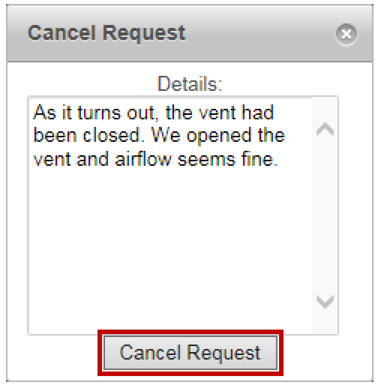
1. From the My Requests list, locate the service request you wish to cancel. Click on the **Request Number** to view its details.



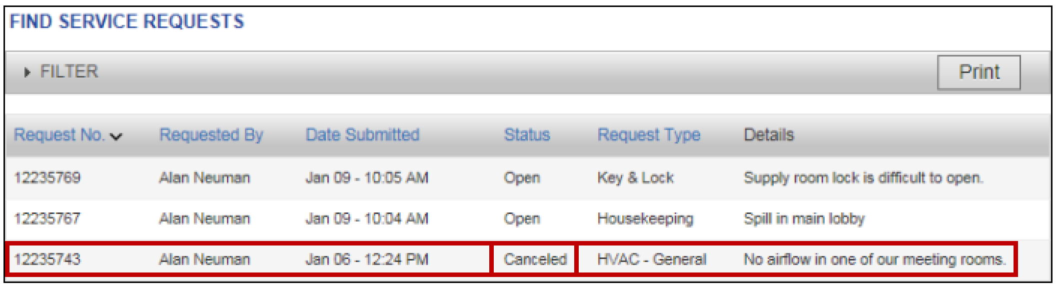
2. From the **Service Request Details** screen, click **Cancel Request**.



3. In the **Cancel Request** popup, explain the reason for canceling the work order in the **Details** field. This is a required field. Click **Cancel Request**.



4. You will be returned to the My Requests list. The service request is now marked as Canceled.

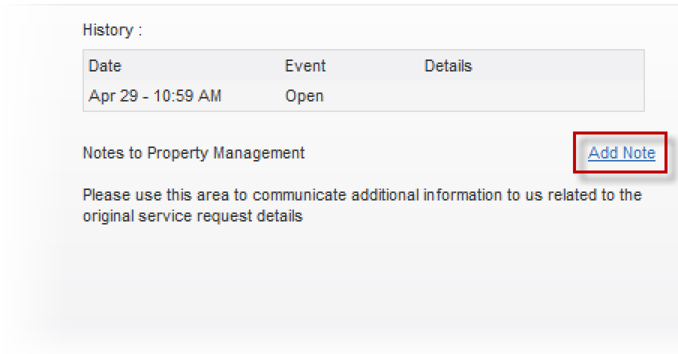


Request No.	Requested By	Date Submitted	Status	Request Type	Details
12235769	Alan Neuman	Jan 09 - 10:05 AM	Open	Key & Lock	Supply room lock is difficult to open.
12235767	Alan Neuman	Jan 09 - 10:04 AM	Open	Housekeeping	Spill in main lobby
12235743	Alan Neuman	Jan 06 - 12:24 PM	Canceled	HVAC - General	No airflow in one of our meeting rooms.

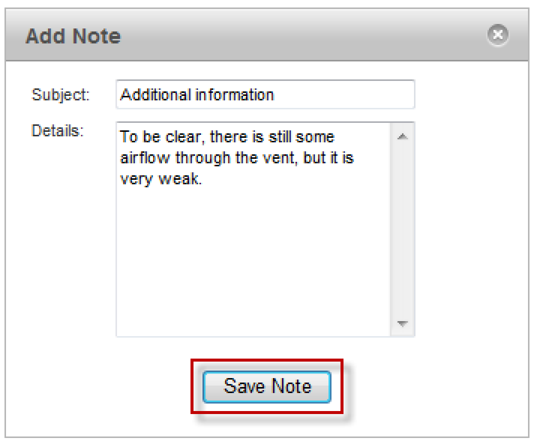
Sending a Note

You can append a note to a service request after it has been made. This can be used to provide additional information concerning the request. To send a note, follow these steps:

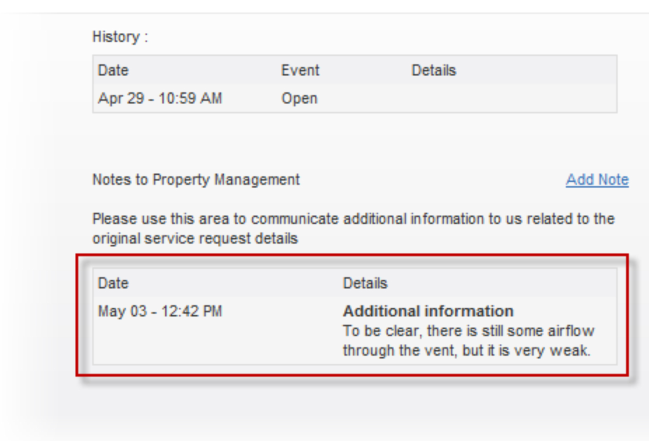
1. Using the [My Requests] list, locate the service request you would like to add a note to. Click the request number to display the request details.
2. On the request details page, click **Add Note**.



3. In the Add Note window that opens, enter a subject name and details for the note, then click **Save Note**



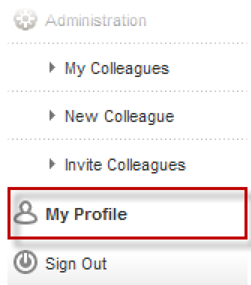
4. The note has now been added to the service request.



My Profile

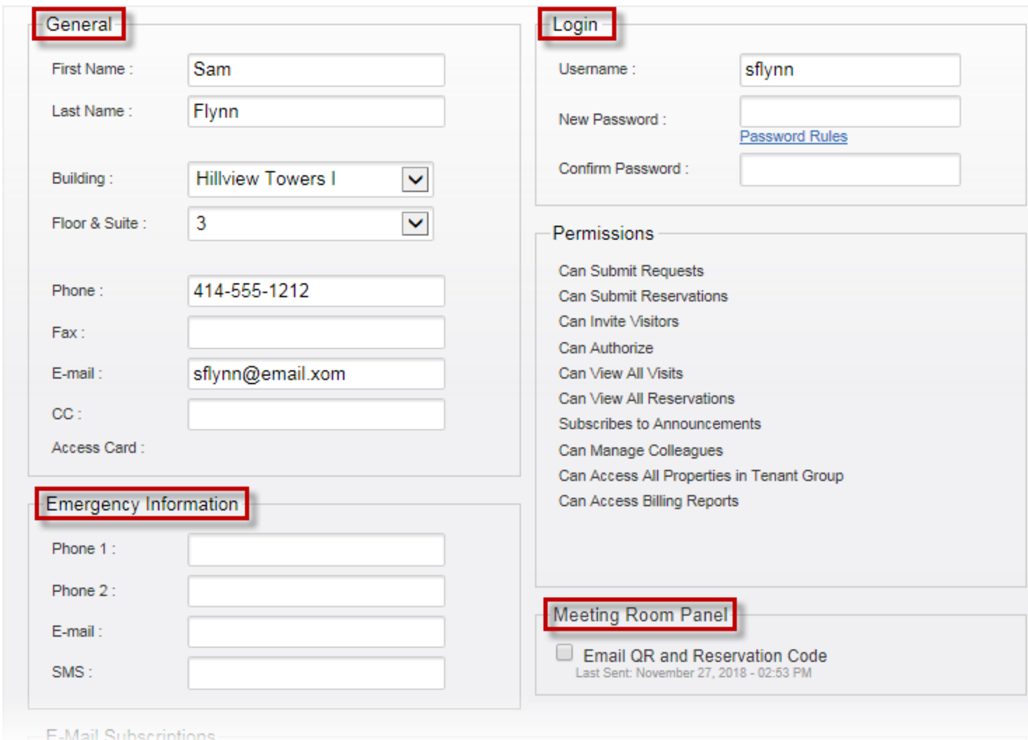
Changing Your Profile

The My Profile screen allows you to manage the information in your account.



Depending on the method used by your Property Managers to handle access cards, the information detailed below may be displayed under a **Profile** tab, and you will see an additional **Access Card** tab. For additional information concerning this tab, see The Access Card Tab.

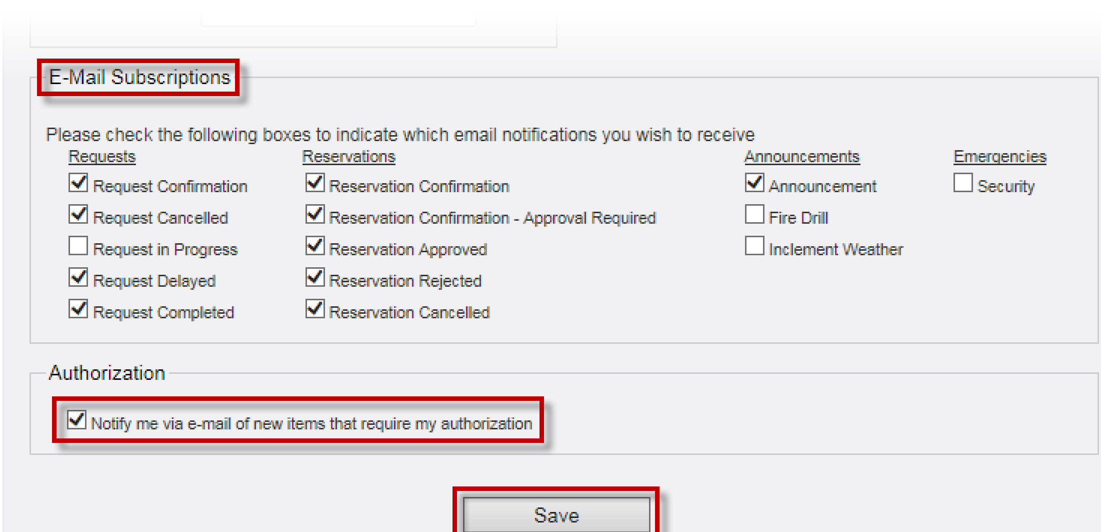
1. The General Information section contains contact and location information. The following information can be changed in this section:
    - Name
    - Property
    - Building
    - Floor & Suite
    - Phone number
    - Fax
    - Email
    - CC (used with service request and reservation notifications)
2. The Emergency Information section allows you to enter emergency contact information, which will be used to receive emergency notifications from property management.
3. The Login section allows you to modify the username and password you use to log in to the Service Portal.
4. If your building uses Meeting Room Panels and you have permission to submit resource reservations, then a Meeting Room Panel section is displayed (shown bottom-right, below). If you have been previously sent a QR and reservation PIN, then you have the option here to resend this information.



5. In the E-Mail Subscriptions section, place checkmarks beside all notification types you would like to receive email notifications for. Notification types are broken down by type (Requests, Reservations, Announcements).

> *i* This option is only available to you if your **Subscribes to Announcements** permission is set to "Yes".

6. If your permissions indicate that you are able to authorize requests, you can enable or disable email notification of new requests by checking or unchecking **Notify me via email...** in the Authorization section.
7. When you are finished making changes, click **Save**.



Authorization

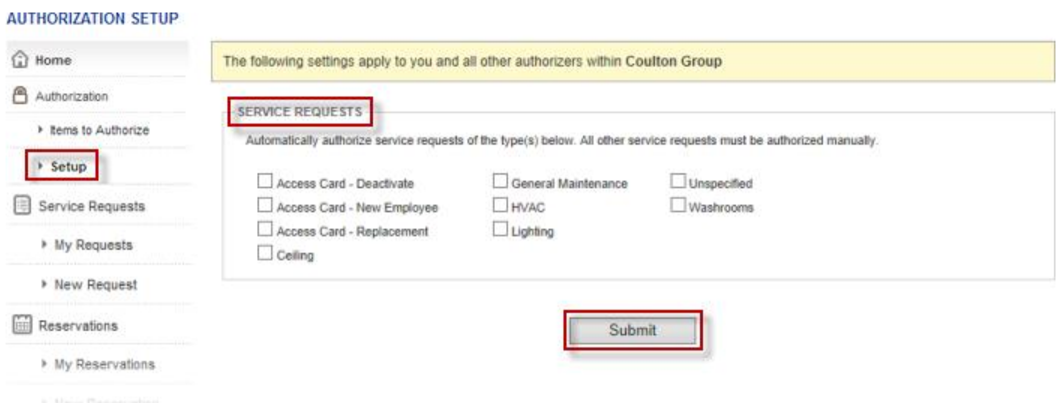
Setup

The Tenant Authorization feature is used to designate specific colleagues as Tenant Authorizers. When new requests are entered into the Service Portal, Tenant Authorizers have the ability to authorize or decline these requests in the Service Portal.

> *i*
> - It is **not** necessary for Tenant Authorizers to be Tenant Administrators.
> - Tenant Authorizers that would like to receive email notifications need to enable this feature in their user preferences. See Changing Your Profile for more information.

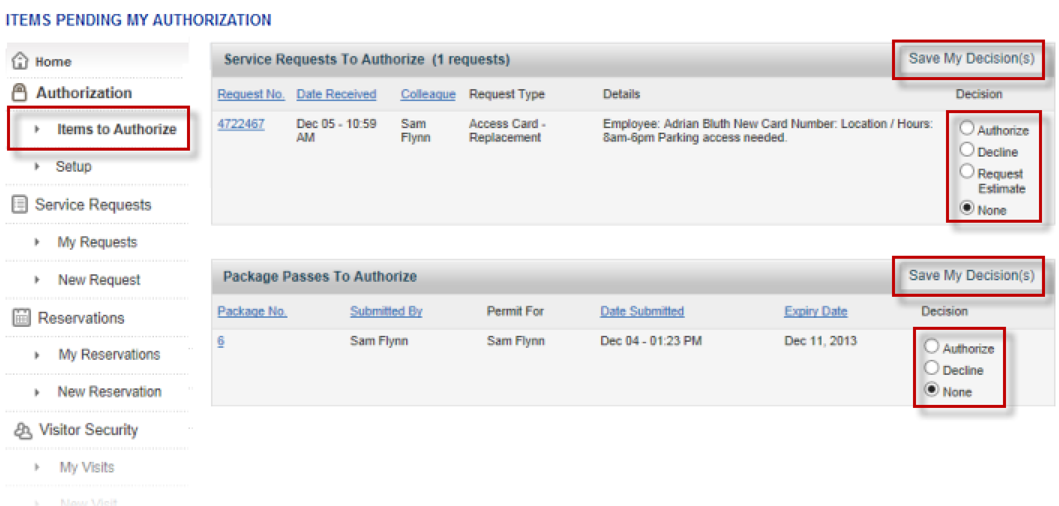
The Setup screen allows you to set up automatic authorization for certain request types. As shown in the screenshot below, these settings apply to all authorizers in your company.

1. Click **Setup** from the menu to the left, found under the **Authorization** section.
2. To select which Request Types can be automatically authorized, locate the desired **Request Type** and click the checkbox to select it.
3. Click **Submit**.



Authorizing Items

1. Select **Items to Authorize** from the main menu. The following item types may require authorization:
    - Service Requests
    - Package Passes
2. You can sort these lists by clicking on the column headings which appear as links (e.g. **Request Number**, **Date Submitted**, etc.)
3. To authorize an item, locate the desired item and click the **Authorize** or **Decline** radio button as desired. For Service Requests, you can also select **Request Estimate** to receive a cost-estimate from your property manager. For more information on requesting and approving estimates, see About Estimates and associated topics.
4. When all selections are made, click **Save My Decisions**. When the requester logs in to the Service Portal, Requests that are authorized will be marked **Authorized** and those that are declined will be marked **Declined**. If **None** is selected, no change will be made to a specific request or reservation (it will still need to be authorised or declined at some point).



Estimates

About Estimates

Some service request types may have fees associated with them, collectively referred to as **billable services**. A cost-estimate can be requested from Property Management when entering a service request. Once the estimate is received, it can then be rejected or approved; rejected estimates will cancel the service request.

The estimate request and approval process varies depending on whether you have Tenant Authorization enabled or not:

- Estimates with tenant authorization
- Estimates without tenant authorization

With Tenant Authorization

When Tenant Authorization is enabled, only Tenant Authorizers can request, approve or reject estimates. Requests for estimates must occur before approving the item.

Requesting an Estimate

1. When [authorizing items,](#) any billable service request will provide Tenant Authorizers with the option to request an estimate. Select **Request Estimate**.
2. Click **Save My Decisions**.

Service Requests To Authorize (1 requests) — Save My Decision(s)

Request No.	Date Received	Colleague	Request Type	Details	Decision
4722467	Dec 05 - 10:59 AM	Sam Flynn	Access Card - Replacement	Employee: Adrian Bluth New Card Number: Location / Hours: 8am-6pm Parking access needed.	Authorize / Decline / Request Estimate / None

3. When Property Management responds with a cost-estimate, the service request will reappear in your list. See Approving an Estimate and Rejecting an Estimate below for additional details.

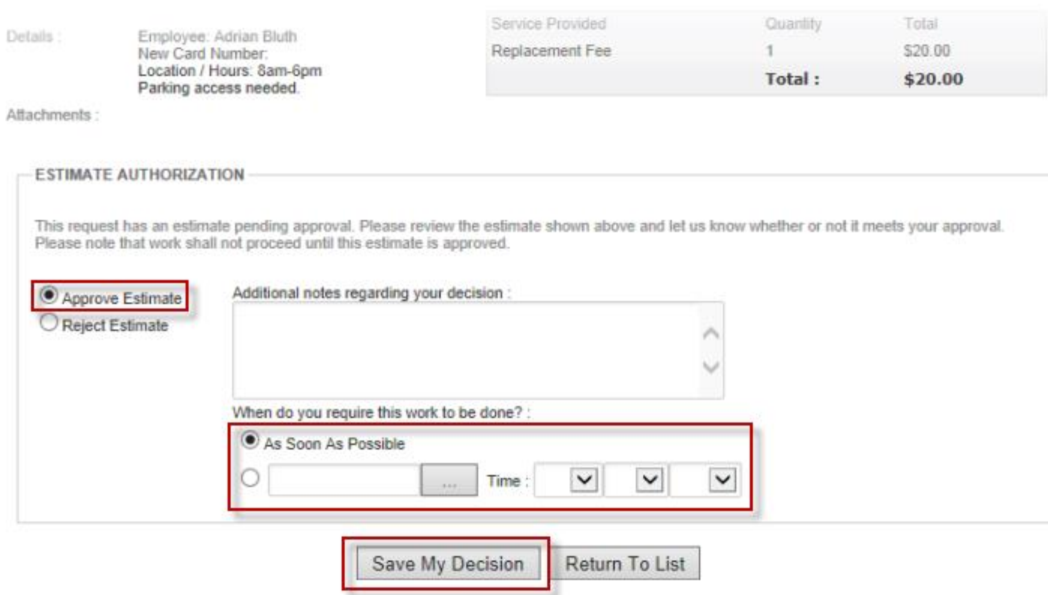
If you are a Tenant Authorizer and are entering a service request, you can instead request an estimate at the time that you create it by putting a checkmark beside the **Estimate Required** option. This option only appears to Tenant Authorizers.

Approving an Estimate

1. Estimates from Property Management can be viewed in the Items to Authorize screen.
2. To approve the estimate, you must view the estimate's details by clicking the **Request Number**.

3. On the estimate details screen that appears, review the estimate cost and any additional relevant information from Property Management.
4. In the **Estimate Authorization** section near the bottom of the screen:

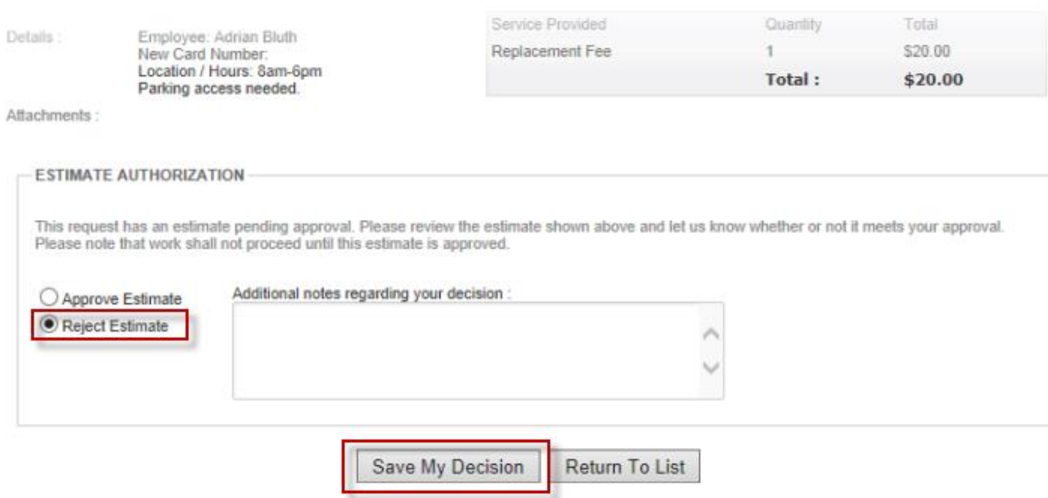
    - Select **Approve Estimate**.
    - Enter any notes related to the decision in the space provided.
    - Select either **As Soon as Possible** or a specific date by which the work should be done.
    - Click **Save My Decision**.



Rejecting an Estimate

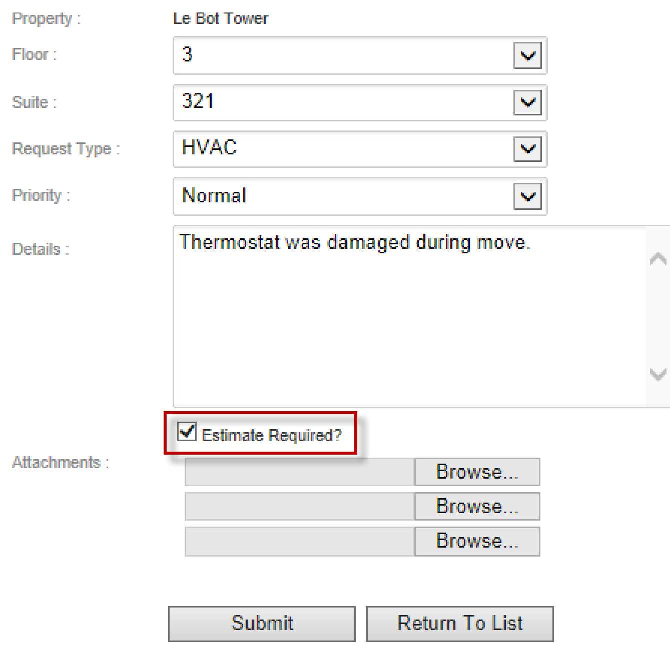
1. Estimates from Property Management can be viewed in the Items to Authorize screen.
2. To reject the estimate, you must view the estimate's details by clicking the **Request Number**.

3. On the estimate details screen that appears, review the estimate cost and any additional relevant information from Property Management.
4. In the **Estimate Authorization** section near the bottom of the screen:
   - Select **Reject Estimate**.
   - Enter any notes related to the decision in the space provided.
   - Click **Save My Decision**.

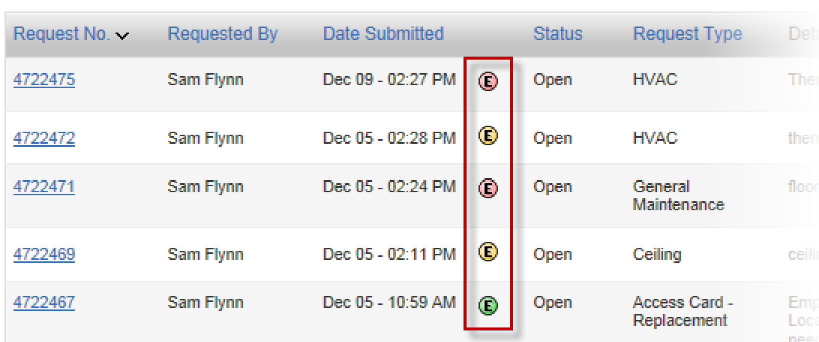


Without Tenant Authorization

For tenants that are not using the Tenant Authorization feature, when you are entering a service request you can request an estimate by placing a checkmark beside **Estimate Required**. For more information on filling out a service request, see [Making a Request](#).



After submitting the service request, you can view the status of your request by clicking on **My Requests** and finding the request. Service requests which require estimates are displayed with a color-coded estimate icon.

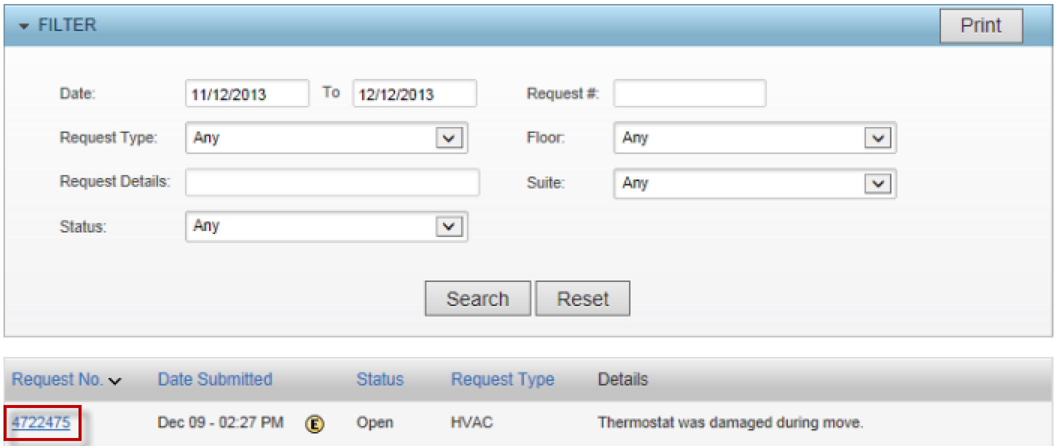


- Ⓔindicates that an estimate is in progress (awaiting reply from Property Management).
- Ⓔmeans that the estimate is pending approval (you can respond and approve or reject the estimate).
- Ⓔdenotes that the estimate was approved.
- Rejected estimates are changed to have a status of **canceled**, and no longer displays an estimate status icon.

See [Approving an Estimate](#) and [Rejecting an Estimate](#) below for additional details.

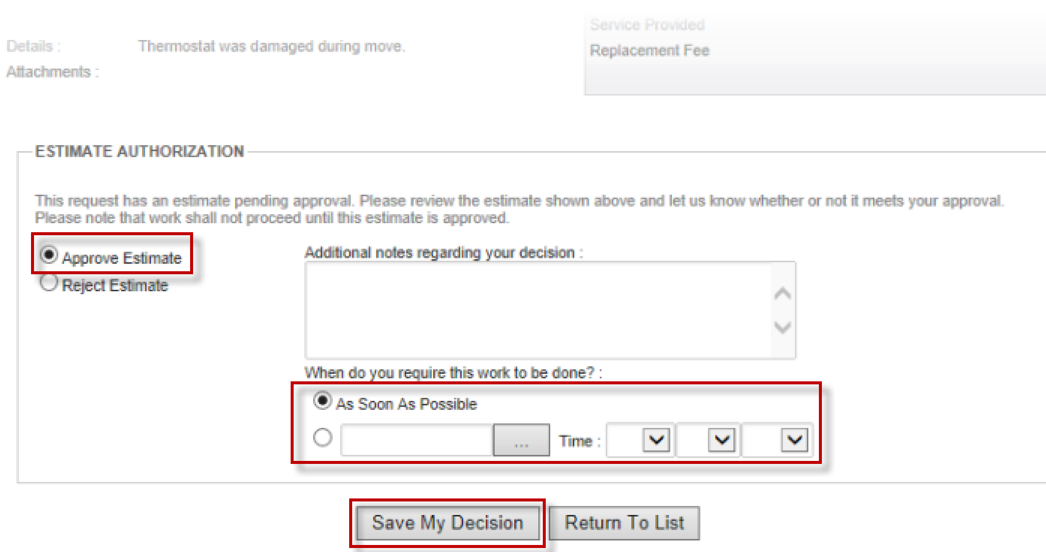
Approving an Estimate

1. Locate the request in the [My Requests]() list. If the request is marked with a yellow estimate icon (Ⓔ) then you will be able to review and approve the estimate.
2. To approve the estimate, you must view the estimate's details by clicking on the **Request Number**.



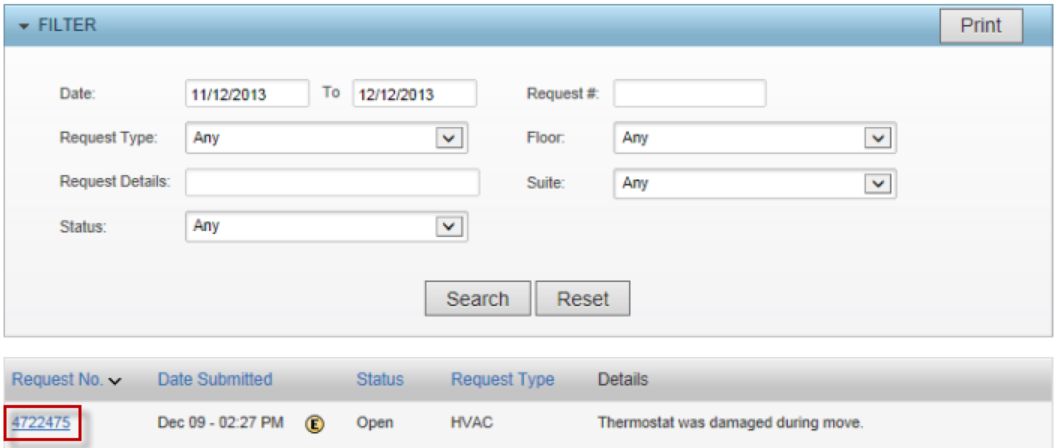
3. On the estimate details screen that appears, review the estimate cost and any additional relevant information from Property Management.
4. In the **Estimate Authorization** section near the bottom of the screen:

   - Select **Approve Estimate**.
   - Enter any notes related to the decision in the space provided.
   - Select either **As Soon as Possible** or a specific date by which the work should be done.
   - Click **Save My Decision**.

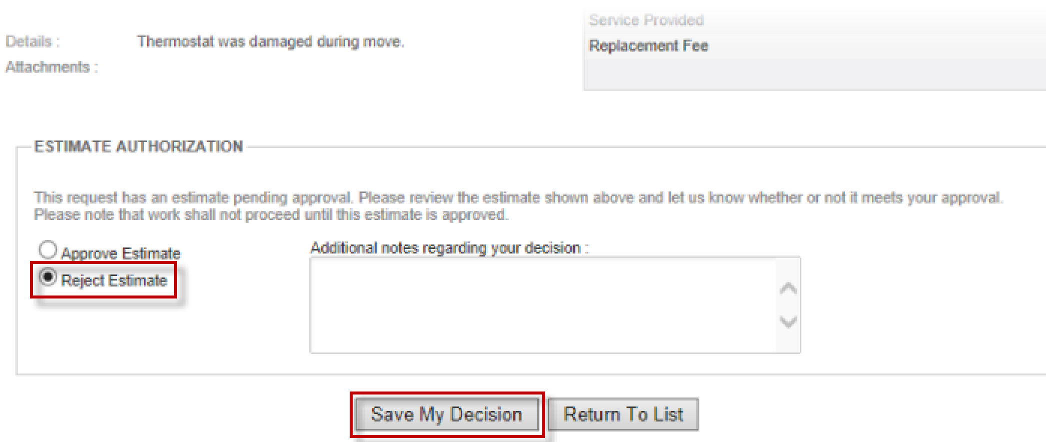


Rejecting an Estimate

1. Locate the request in the My Requests list. If the request is marked with a yellow estimate icon (Ⓔ) then you will be able to review and reject the estimate.
2. To reject the estimate, you must view the estimate's details by clicking the **Request Number**.



3. On the estimate details screen that appears, review the estimate cost and any additional relevant information from Property Management.
4. In the **Estimate Authorization** section near the bottom of the screen:
   - Select **Reject Estimate**.
   - Enter any notes related to the decision in the space provided.
   - Click **Save My Decision**.



Tenant Administrators

About Tenant Administrators

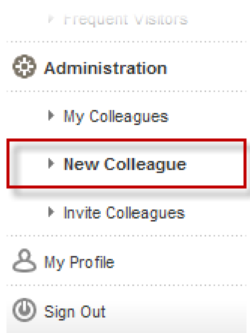
Tenant Administrators are users that have access to your Service Portal and have the ability to grant colleagues permission to do one or more of the following:

- Make tenant requests
- View billing reports
- Request reservations
- Create visits
- Self-subscribe to announcements

The abilities that a Tenant Administrator has are determined by their Tenant Administrator Permissions, which are set up at the time the account is created (or can be added at a later date by your property management company).

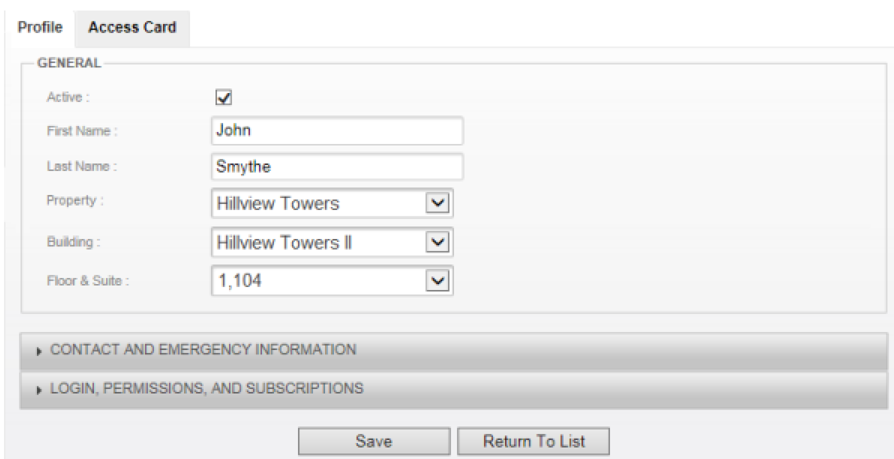
Adding a Colleague

To add a colleague as a contact in the Service Portal, start by clicking **New Colleague** in the Administration section of the Service Portal's menu, located on the left side of the screen. The Contact Entry screen is displayed.

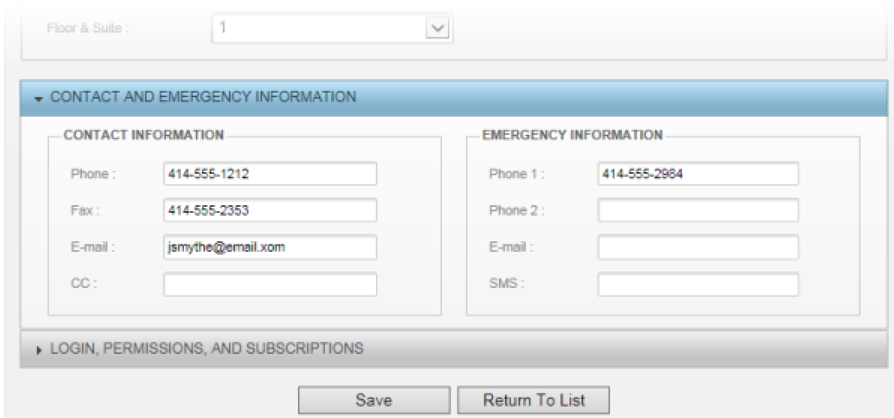


Depending on the method used by your Property Managers to handle access cards, the information detailed below may be displayed under a **Profile** tab, and you will see an additional **Access Card** tab. For additional information concerning this tab, see The Access Card Tab.

1. The General section contains basic name and location details (First & Last name, Property & Building, Floor & Suite). Fill in all information in this section.



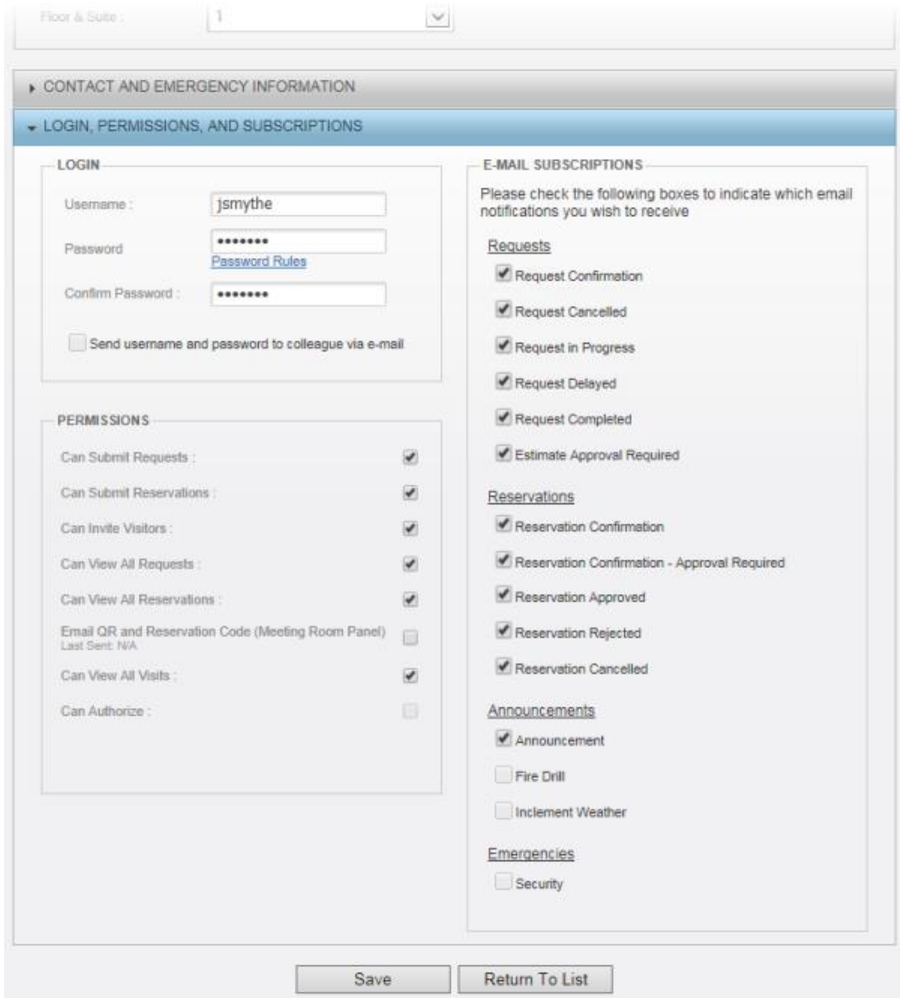
2. The Contact and Emergency Information section allows you to enter daytime and emergency contact information. Emergency contact information is used by property management to send emergency notifications.



3. Use the Login, Permissions and Subscriptions section to enter the following information:
    - Use the Login section to create a username and password to log in to the Service Portal. Place a checkmark beside **Send username and password...** if you would like to send the login information by email (if you do not, you will need to provide the colleague with the login information by some other means).
    - The Permissions section allows you to set up the colleague's access level.
    - If your building uses Meeting Room Panels and your colleague has access to submit resource reservations, you also have the option in this section to select **Email QR and Reservation Code**, allowing you to send or re-send the colleague's Meeting Room Panel login information.

> *i* Depending on the specific administrative permissions you have been given, one or more options in the Permissions section may be inaccessible to you.

    - In the E-Mail Subscriptions section, place checkmarks beside all notification types you would like your colleague to receive email notifications for. Notification types are broken down by type (Requests, Reservations, Announcements).

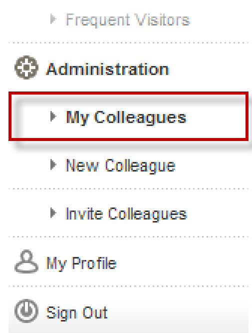


4. When you are finished, click **Save**.

Modifying Colleagues

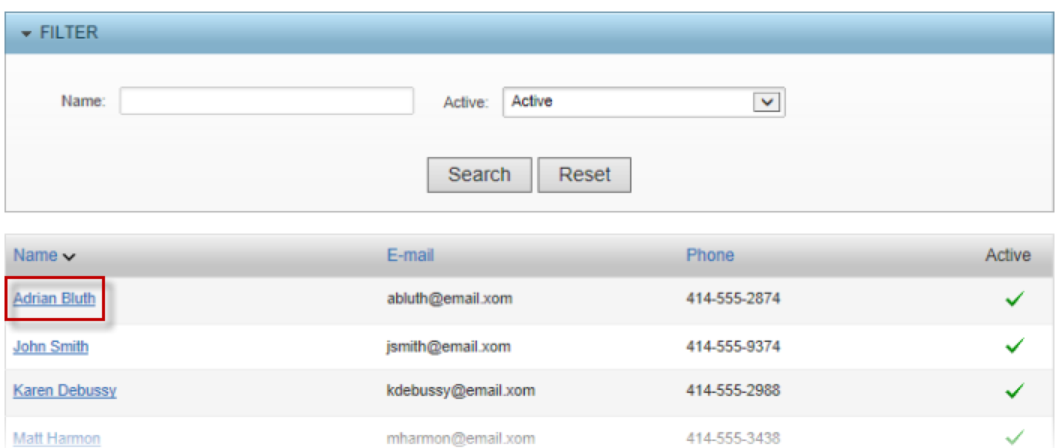
Tenant Administrators can modify their colleagues' settings in the following manner:

1. Click **My Colleagues** in the Administration section of the Service Portal's menu, located on the left side of the screen. A list of Colleagues are displayed.



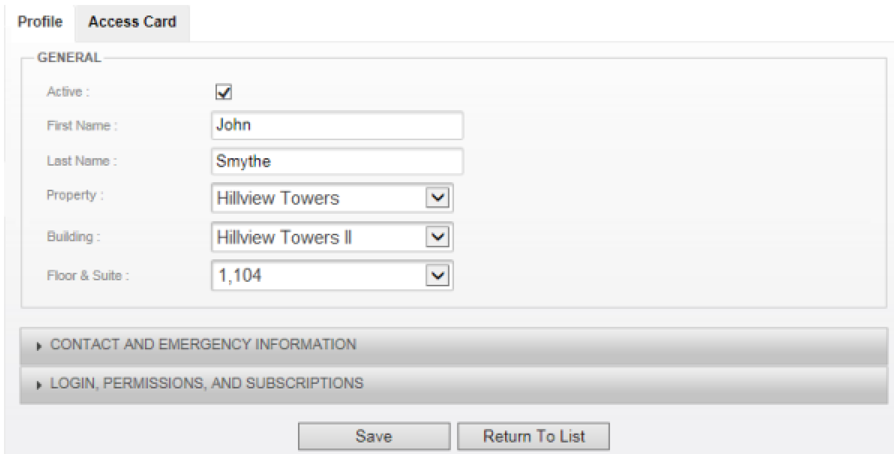
2. Select the colleague you would like to modify. The Contact Entry screen will be displayed.

> *i* The My Colleagues list can be filtered by entering a partial for full name in the **Name** field, and set to display active or inactive contacts using the **Status** drop-down list and clicking **Search**. You can also sort the list in ascending or descending order by clicking on the **Name**, **E-mail**, and **Phone** field headings.

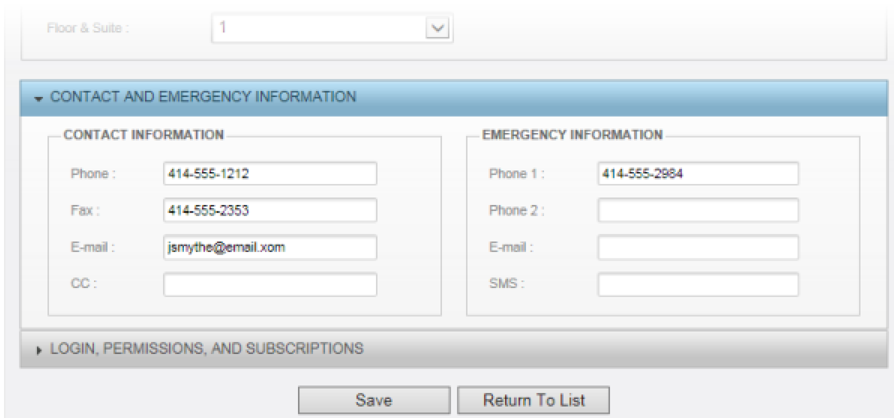


Depending on the method used by your Property Managers to handle access cards, the information detailed below may be displayed under a **Profile** tab, and you will see an additional **Access Card** tab. For additional information concerning this tab, see The Access Card Tab.

3. Use the General section to edit name and location details (First & Last name, Property & Building, Floor & Suite).



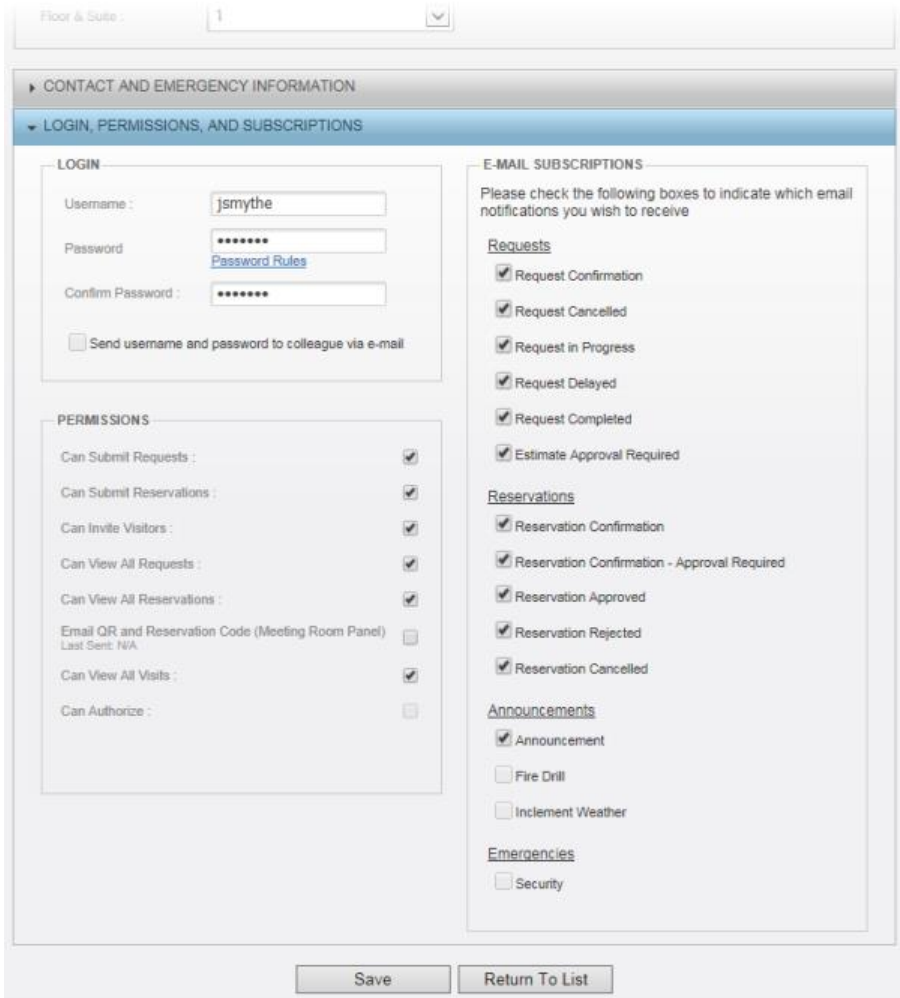
4. The Contact and Emergency Information section allows you to edit daytime and emergency contact information. Emergency contact information is used by Property Management to send emergency notifications.



5. Use the Login, Permissions and Subscriptions section to edit the following information:
   - Use the Login section to edit the username and password to log in to the Service Portal. Place a checkmark beside **Send username and password...** if you would like to send the login information by email (if you do not, you will need to provide the colleague with the login information by some other means).
   - The Permissions section allows you to modify the colleague's access level.
   - If your building uses Meeting Room Panels and your colleague has access to submit resource reservations, you also have the option in this section to select **Email QR and Reservation Code**, allowing you to send or re-send the colleague's Meeting Room Panel login information.

> *i* Depending on the specific administrative permissions you have been given, one or more options in the Permissions section may be inaccessible to you.

- In the E-Mail Subscriptions section, place checkmarks beside all notification types you would like your colleague to receive email notifications for. Notification types are broken down by type (Requests, Reservations, Announcements).



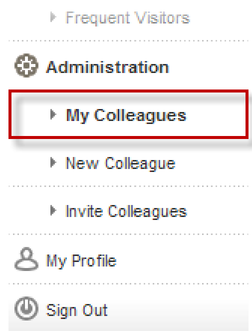
5. When you are finished making changes, click **Save**.

Deleting a Colleague

Colleagues cannot be deleted; however, you can deactivate them, which disables the account. See Deactivating a Colleague.

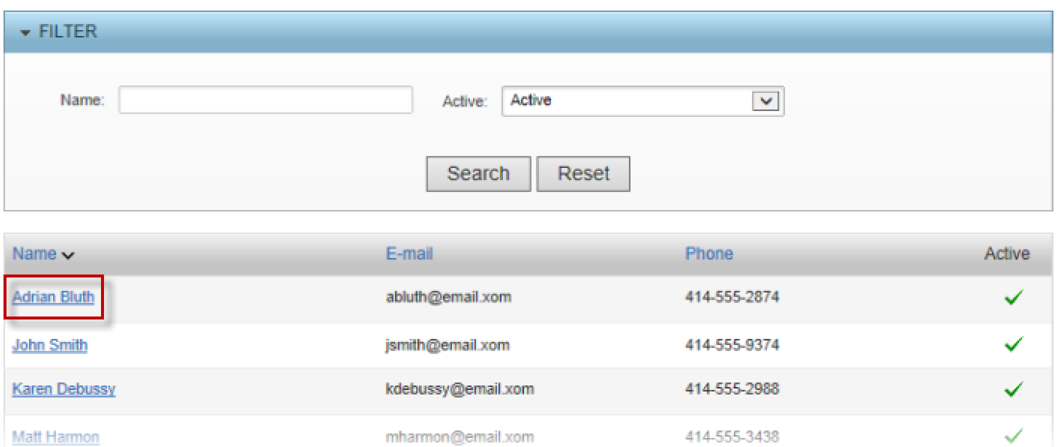
Deactivating a Colleague

1. Click **My Colleagues** in the Administration section of the Service Portal menu, located on the left side of the screen. A list of Colleagues are displayed.

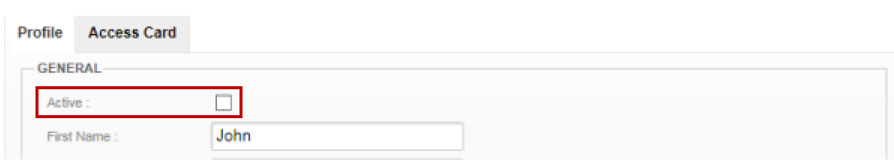


2. Select the colleague you would like to deactivate. The Contact Entry screen will be displayed.

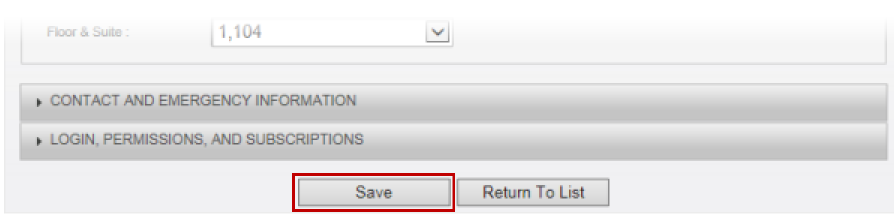
> *i* The My Colleagues list can be filtered by entering a partial for full name in the **Name** field, and set to display active or inactive contacts using the **Status** drop-down list and clicking **Search**. You can also sort the list in ascending or descending order by clicking on the **Name**, **E-mail**, and **Phone** field headings.



3. In the General section, remove the checkmark beside **Active**.



4. Click **Save**.



Mobile Service

The Mobile Service Application

The Mobile Service application provides tenants and building occupants with a convenient way to create and track service requests on iOS and Android™ devices.

The Mobile Service application can be run on devices using the following operating system versions:

- iOS 7.1.1 or later.
- Android 4.0.4 or later.

The Mobile Service app currently supports Service Requests and viewing any property management documentation that has been made available through your Service Portal. If enabled for your property, the following additional functionality is also supported:

- Tenant Groups (when creating service requests)
- Tenant Authorization
- Estimates

This application includes camera integration, allowing you to quickly take a picture of the affected location and attach it to your service request. In many cases, attaching a picture to your service request can make it easier for your Property Manager to quickly assess the nature and scope of the issue and respond appropriately, without needing to spend additional time describing the situation in detail.

To get started using the Mobile Service application, see Installing the Mobile Service Application and Logging In.

Installing the Mobile Service Application

The Mobile Service application is supported by iOS (Apple®) and Android™ devices.

- If you are using a device running iOS 7.1.1 or later, you can download and install the application using the App Store.
- For devices running Android 4.0.4 or later, download and install the application using Google Play.

Search for "Mobile Service" in the online store, then download and install the application. Once installation is complete, run the application and log in to begin using it.

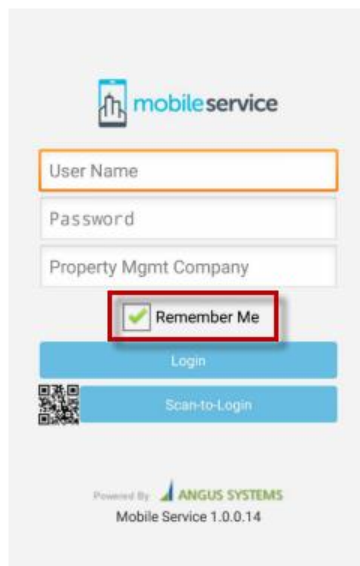
Logging In

There are two methods for logging in to the Mobile Service application for the first time: by scanning a QR code, or manually entering login credentials. The information you will require for either method is displayed in your Service Portal. Log into your Service Portal using your desktop browser, and on the Home page, locate the Mobile Service information panel (shown below, left).

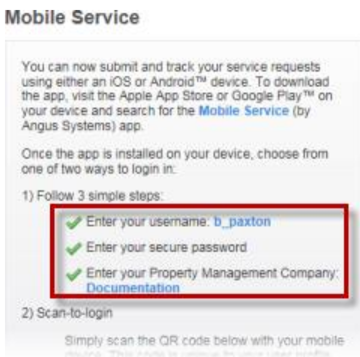
It is also recommended that you leave **Remember Me** checked on the Mobile Service application's login screen. This will prevent you from needing to log in again if you turn off your mobile device, or manually close the application (shown below, right).

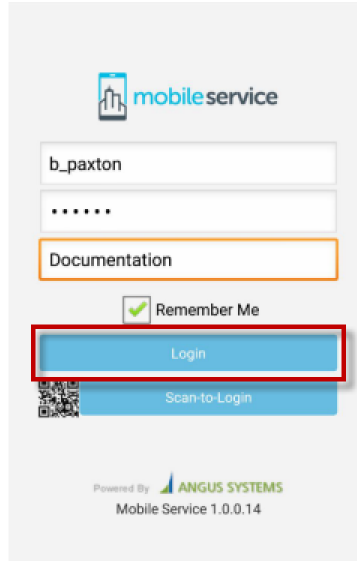
Mobile Service Panel (Service Portal)

Mobile Service Application (Login Screen)



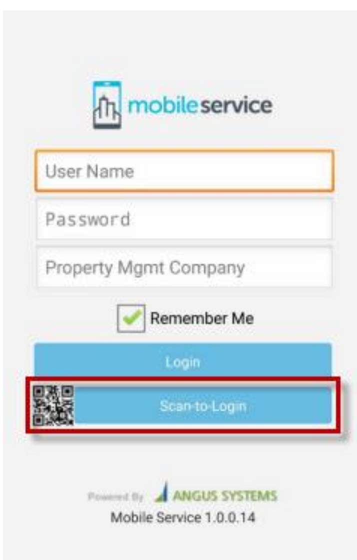
1. **Manual Login**
   - On your mobile device, open the Mobile Service application if it is not already open. There are three fields which need to be filled in: Username, Password, and Property Management Company.
   - Fill in these three fields using the information provided in the Service Portal's Mobile Service panel. Note that the username and password are identical to your Service Portal login.
   - In the Mobile Service application, press Login to complete the process.





2. **QR Code Login**

- Download and install the **Mobile Service by Angus Systems** app from the Apple App store or Google Play.
- On your iPhone® or Android™ device, go to the Mobile Service App sign-in page.
- Tap the **Scan-to-Login** button on the sign-in page.
- Point your mobile device's camera at the QR code on your computer, using the red line as a guide to center the QR code on your device's screen. The QR code will be automatically scanned once it is lined up.



- If the QR code does not work: the QR code may have expired. Click on the Generate New Login Code button below the QR code on your computer, and retry the scan.

Logging in After the First Time

There are some circumstances which will require you to log into the Mobile Service application again:

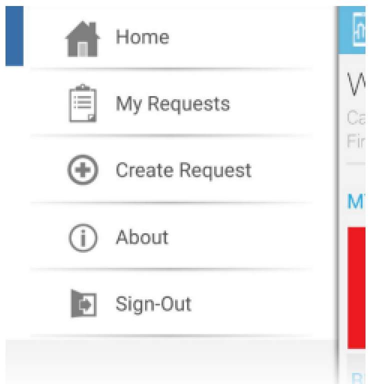
- Closing the application or turning off your mobile device, if **remember me** was not selected on the login screen.
- 30 days of inactivity, whether or not **remember me** was selected.
- Manually logging out of the application.

To log in again, you can repeat the manual or QR code login processes described in the sections above.

The Home Page

The Home page is the main screen that will be displayed every time you launch the application (or after logging in). A brief explanation of the various Home Page sections is detailed below:

1. Pressing the *Main Menu* icon at the top left corner of the screen allows you to navigate between the various screens on the application: **Home**, **My Requests**, **Create Request**, **About**, and **Sign Out**. Press an option in the menu to view the associated page.



    - If you are not currently on the Home page, pressing **Home** will return you to the Home page.
    - The **My Requests** option will display the My Requests list.
    - Press **Create Request** to create a new service request.
    - Selecting **About** will display the application's current version number.
    - Pressing **Sign Out** will log you out of the application, requiring you to *log in* the next time you want to use the application.

2. General user information is displayed at the top of the home page:
    - Your name

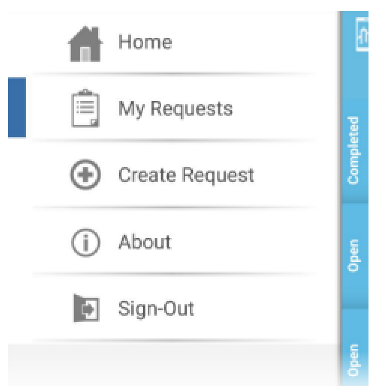
- Your company name and the property in which you reside

3. The **My Service Requests** section displays a dashboard listing the current status of your service requests:
    - **Open** service requests are requests that you have made where work has not yet been started
    - **In Progress** service requests are currently being worked on.
    - **Completed** service requests indicates the number of requests that have been completed in the last 30 days.
    - Pressing any of the tiles in the **My Service Requests** section will navigate you to the **My Requests** list.
4. If your Service Portal normally contains a *Resource Center* section, this section is also displayed on the Home page. From here, you can press on any of the documents to view them.

The My Requests List

The My Requests list displays all of your requests that are currently open, in progress, or completed during the past month. A brief explanation of the various elements of the list is detailed below:

1. Pressing the **Search** icon displays the *Search Pane* allowing you to select a variety of sort and search options to filter the My Requests lists. Alternatively, you can swipe the screen from right-to-left to expose the Search Pane.
2. Pressing the Main Menu icon at the top left corner of the screen allows you to navigate between the various screens on the application: **Home**, **My Requests**, **Create Request**, **About**, and **Sign Out**. Press an option in the menu to view the associated page.



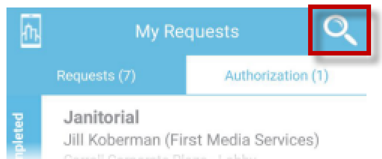
- Pressing **Home** will return you to the Home page.
- If you are not currently viewing the My Requests list, the **My Requests** option will return you to the list.

- Press **Create Request** to create a new service request.
- Selecting **About** will display the application's current version number.
- Pressing **Sign Out** will log you out of the application, requiring you to log in the next time you want to use the application.

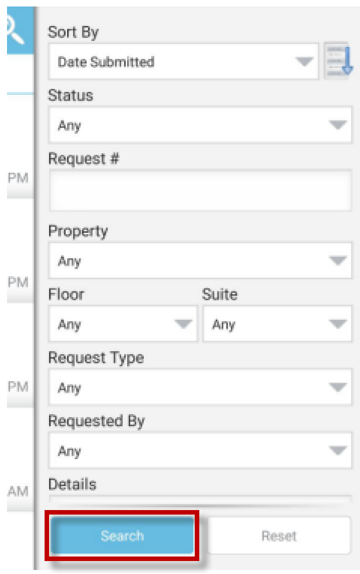
3. The **Requests** and **Authorization** tabs are only displayed if Tenant Authorization has been enabled.
    - **Requests** displays all approved requests.
    - **Authorization** displays all requests that are still pending approval by a Tenant Authorizer. Once a request has been authorized, it is moved to the **Requests** tab.
4. The request status is displayed on a bar to the side of each request in the list. The request status can be: open, in progress, delayed, canceled or completed.
5. Each service request is summarized on the list. The request type, requester name, location, request ID number, and request submission dates are all displayed. Tap a request summary to see the full request details and view additional options.

Searching for a Request

From the My Requests list, pressing the Search icon displays the Search screen, allowing you to select a variety of sort and search options to filter the My Requests lists.



In this screen, you can select the search or filtering options you would like to apply to the list. Depending on the size of your mobile device's screen, you may need to scroll down to view all available options.



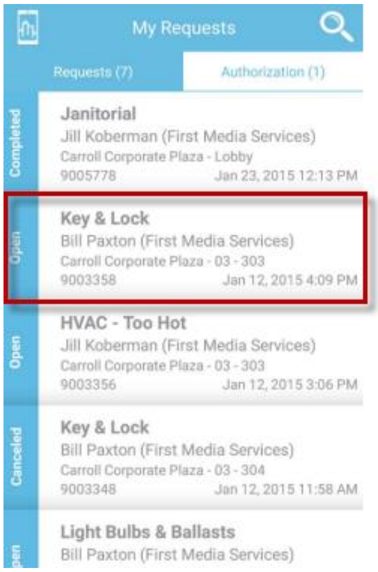
The following filter and sort options are available:

- **Sort By**: date submitted, request #, or request type
- **Status**: any, open, in progress, delayed, canceled, completed
- **Request #**: searches for a full or partial match that begins with the number entered
- **Property**: if your company has offices in multiple properties, you can filter your request list by property.
- **Floor/Suite**
- **Request Type**
- **Requested By**: if you have access to view your colleague's service requests, you can filter the list to display a particular colleague's requests
- **Details**: looks for a keyword match in the request's details.
- **Start date/end date**: filter the list to only display service requests that were submitted between the specified dates. By default, you are shown request for the past month.

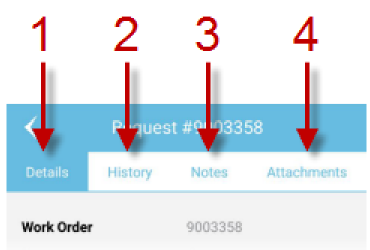
Once you are finished entering your sort or filter options, press **Search**.

Viewing Request Details

You can view a request's details from the My Requests list. Tap on a request to view the full request details.



The Details tab is open by default. Additional information is provided under the History, Notes, and Attachments tabs. A brief explanation of the purpose of each tab is provided below.



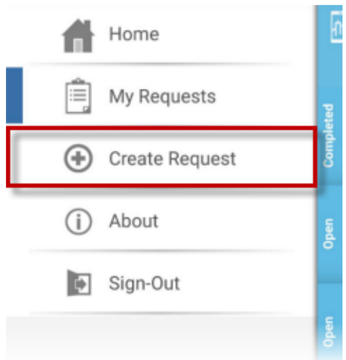
1. The **Details** tab, selected by default, displays the following:
    - **Work order number**
    - **Status**
    - **Date Received**
    - **Date Required**
    - **Requested By** (department, employee)
    - **Details**: Request Type, Description
    - **Location**: Property, Building, Floor, Suite
    - **Additional Information**:any additional information that your property management company may require to process service requests; if property management does not collect any additional information, this section is not displayed)

2. The **History** tab shows the history of the request's status, listing the dates that the status changed (for example, the date the request was opened, work started, and was completed).
3. The **Notes** tab contains any additional information concerning the work that was appended to the service request. Tenants can add messages in this section, either for notekeeping purposes or to request (and receive) additional information.
4. The **Attachments** tab displays any files, such as pictures, that were appended to the service request. Tap on an attachment to view it.

Creating a Request

To create a new request:

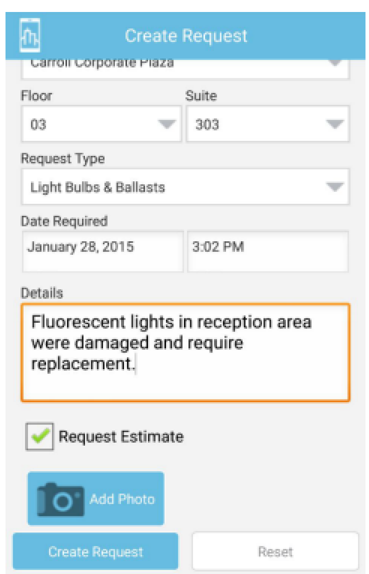
1. Press the Main Menu icon in the top-left corner of the screen, and select **Create Request**.



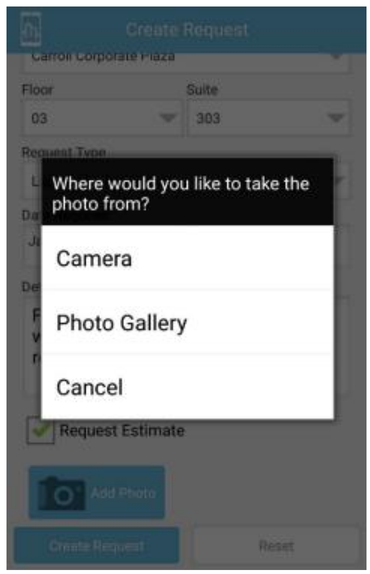
2. The Create Request screen is displayed. From here, you can enter in a variety of details related to your request. Depending on the size of your mobile device's screen, you may need to scroll down to view all available fields. The default set of fields are displayed below; however, your Property Manager may have added additional fields that will need to be filled out. If present, these fields will appear at the bottom of the form.

   If you have offices in more than one building and your tenancy has been set up to allow you to create requests for more than one property or building, the following additional fields may need to be filled in:

   - If your tenancy spans multiple properties, then the **Property** field will be displayed. Select the property for the service request.
   - If your tenancy is in more than one building on the same property, then the **Building** field will be displayed. Select the building for the service request.



3. If your Property Manager has enabled the estimates feature, you can select **Request Estimate** to receive an estimate of any fees that may be associated with it (labor, parts, etc.) Once received, this estimate must be approved before work can commence. For additional details see *Approving Estimates*. Please note that if Tenant Authorization is enabled for your company, this option will only be visible to a Tenant Authorizer.
4. If you wish to include a picture of the area involved in the service request, you can press **Add Photo**. You can include up to 3 pictures. After pressing this button, you will be given three options:
    - **Camera:** accesses the camera on your mobile device, allowing you to take a picture. Once you have taken the picture, it will automatically be added to your service request.
    - **Photo Gallery:** if you have already taken a picture, this option allows you to select pictures from your photo gallery.
    - **Cancel:** no photo will be attached to the service request.



5. Press **Create Request** when you are finished.

Tenant Authorization

If enabled by your property manager, the Tenant Authorization feature is used to designate specific colleagues as Tenant Authorizers. When new requests are entered into the Service Portal by other colleagues, Tenant Authorizers have the ability to authorize or decline these requests.

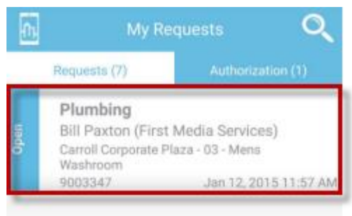
- Requests created by a Tenant Authorizer are automatically authorized.
- If estimates are also enabled, then only Tenant Authorizers can request, approve, or reject estimates.

Authorizing a Service Request

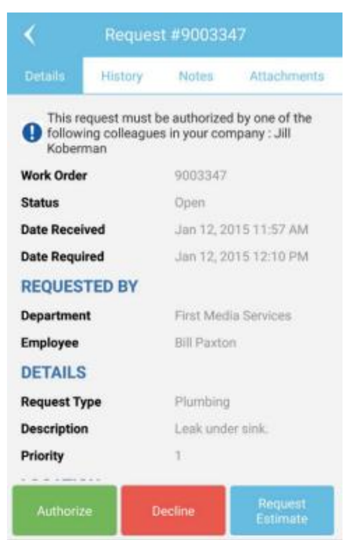
If Tenant Authorization has been enabled, a Tenant Authorizer is required to approve service requests made by coworkers. Tenant Authorizers should follow the steps below to approve requests.

1. Open your **My Requests** list and select the **Authorization** tab to display a list of requests that are awaiting authorization.

2. Select a request from the list to display the request's details.



- Up to three options are available at the bottom of the screen:
- **Authorize** will authorize the request, allowing work to proceed on the request.
- **Decline** will cancel the request. No work will be performed.
- If your Property Manager has enabled the estimates feature, **Request Estimate** sends a request to Property Management for a cost-estimate of any work which may be associated with the service request. Once the estimate is received, you can then approve or decline the estimate; see the Estimates topic for additional details.

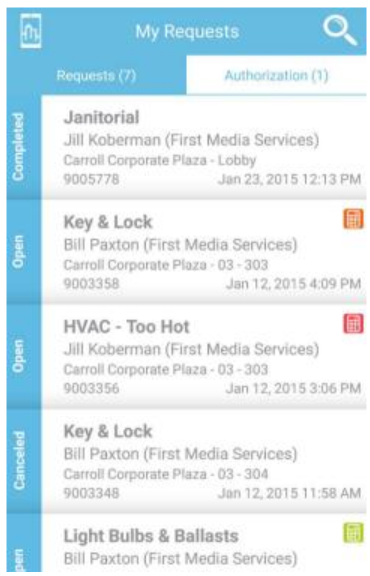


Estimates

If your Property Manager has enabled the estimates feature, you can request a cost-estimate for service requests that may incur a service fee (for parts, labor, etc.) Estimates are requested in one of two ways:

- If Tenant Authorization is enabled, only Tenant Authorizers can request an estimate for service requests.
- If Tenant Authorization is not enabled, any user can request an estimate at the time that the service request is created.

Service requests that have an estimate request associated with them are flagged with the **Service Request** icon ( ). This icon is color-coded to represent the status of the estimate request.



- A red status icon ( ) indicates that a response from Property Management is still pending.
- An orange icon ( ) means that Property Management has responded with an estimate which requires approval.
- A green icon ( ) indicates that the estimate has been approved (either by the requestor, or by a Tenant Authorizer if Tenant Authorization is enabled).

See Approving and Rejecting Estimates for additional details.

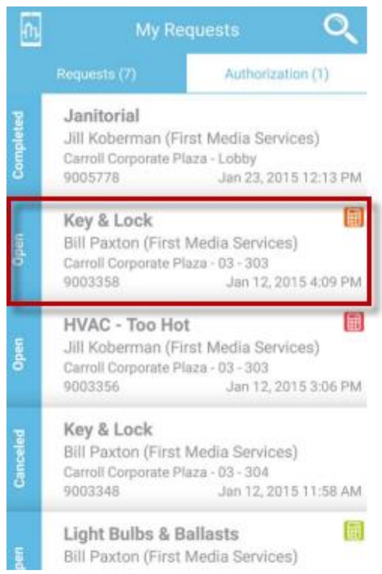
Approving and Rejecting Estimates

Once you have received an estimate, the estimate must be approved before work can commence on your service request. Rejecting an estimate will cancel the service request.

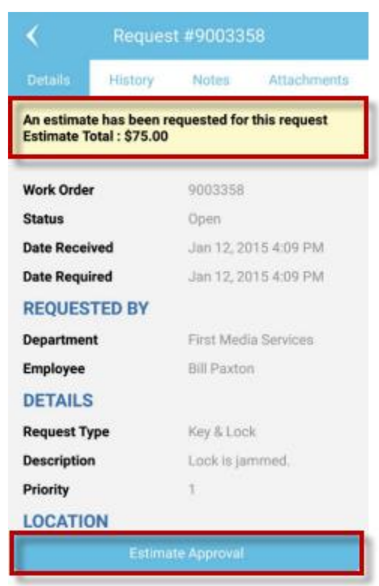
> *i* If [Tenant Authorization]() is enabled, then only Tenant Authorizers can approve or reject estimates.

Follow the steps below to approve or reject an estimate:

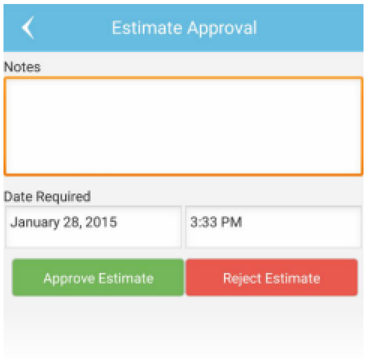
1. Select the service request in your **My Requests** list to view its details.



2. At the top of the request details, the cost estimate is displayed. To approve or reject the estimate, select **Estimate Approval** at the bottom of the screen.



3. On the Estimate Approval screen, you can enter any notes related to the approval (or rejection) of the estimate, then select **Approve Estimate** or **Reject Estimate**.



4. In the confirmation popup that appears, select **Yes** to complete the process.