Angus AnyWhere™ Version 4.3

Tenant Support Interface (TSI)

User Manual

Commercial Properties Limited

Table of Contents

@Your Service

www.commercial-properties.ca

1-877-536-6600

Getting Started

About the Tenant Services Interface

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

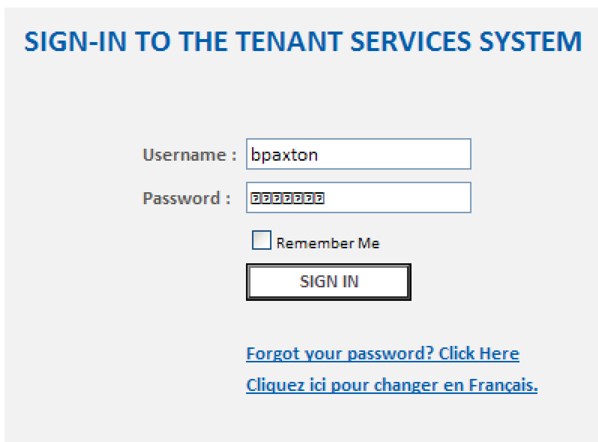
Your property management company will provide a web address, user name and password for using your Tenant Services Interface.

Please note that the screenshots included here are for instructional purposes only and will not necessarily appear as depicted, depending on how the TSI has been configured for your property.

Logging In

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

1. Establish an Internet connection. Open a web browser and enter the web address to your Tenant Services Interface, as provided by your property management company. Click the Tenant Services link. 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. Click **Sign In**.



Tenant Administrators

About Tenant Administrators

Tenant Administrators are contacts that have access to the TSI and have the ability to grant colleagues permission to do one or more of the following:

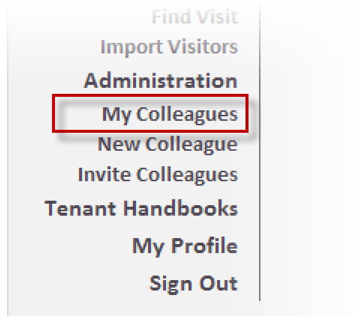
- Make tenant requests
- Request reservations
- Create visits
- Self-subscribe to announcements

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 property managers).

Modifying Colleagues

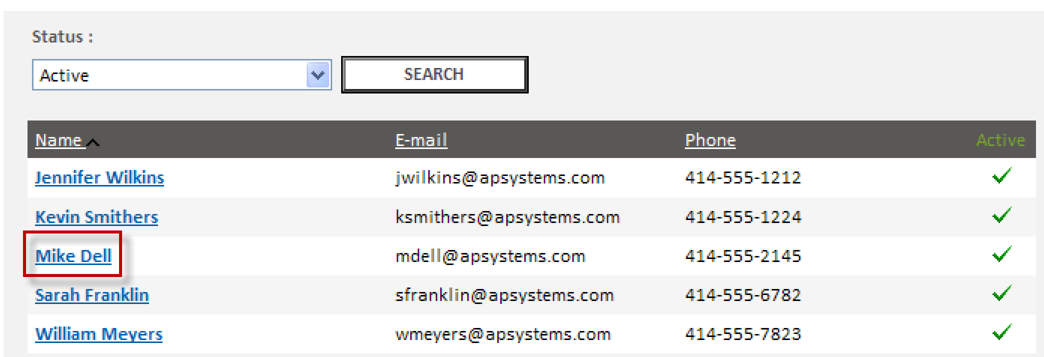
Tenant Administrators can modify their colleagues' settings in the following manner:

1. Click **My Colleagues** in the Administration section of the TSI 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 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.



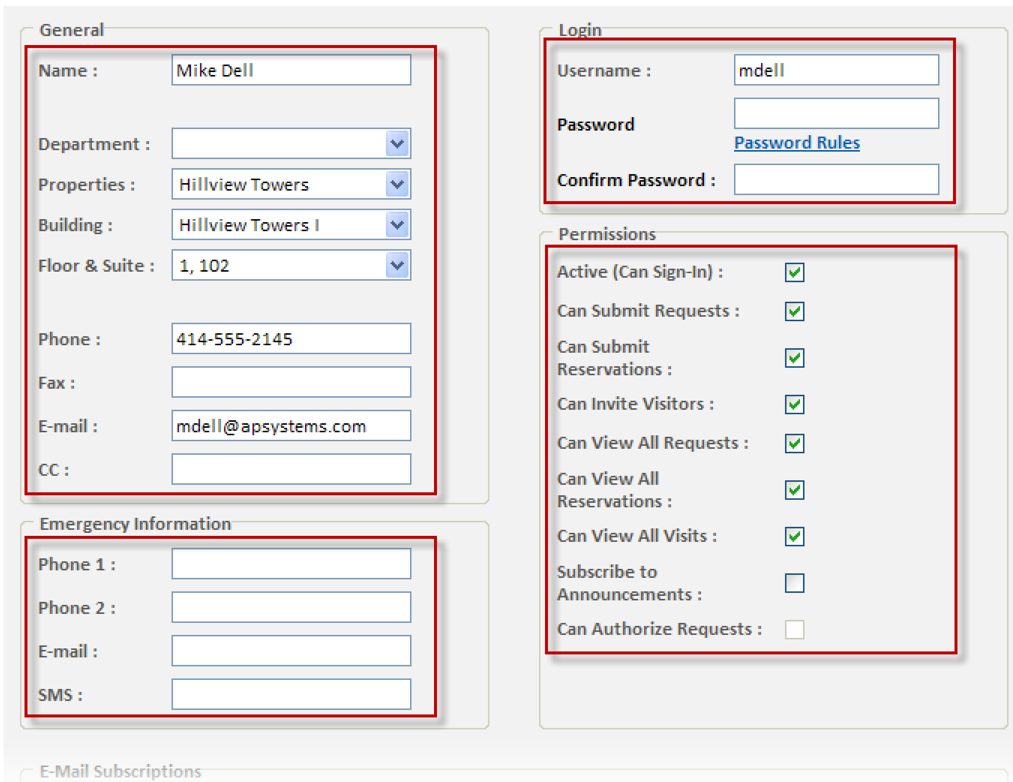
3. The General Information section contains contact and location information. The following information can be changed in this section:

   - Name
   - Property
   - Building
   - Floor & Suite
   - Phone number
   - Fax
   - Email

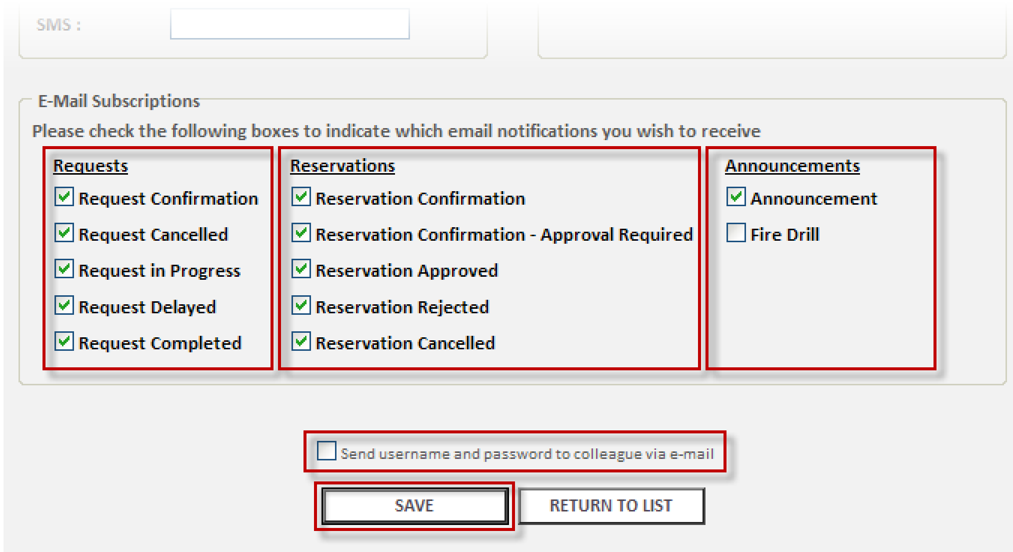
- CC (used with service request and reservation notifications)

4. The Emergency Information section allows you to enter emergency contact information, which will be used to transmit emergency notifications.
5. The Login section allows you to modify the username and password you use to log in to the TSI.
6. The Permissions section allows you to modify the colleague's permissions.

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



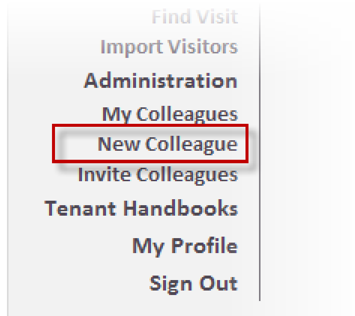
7. In the E-Mail Subscriptions section, place checkmarks beside all notification types you would like your colleague to receive email notifications for. Notification types are broken down by type (Requests, Reservations, Announcements).
8. If you made a change to your colleague's login information, place a checkmark beside **Send username and password...** if you would like to send the new login information by email.
9. When you are finished making changes, click **Save**.


SMS :
E-Mail Subscriptions
Please check the following boxes to indicate which email notifications you wish to receive
Requests
Request Confirmation
Request Cancelled
Request in Progress
Request Delayed
Request Completed
Reservations
Reservation Confirmation
Reservation Confirmation - Approval Required
Reservation Approved
Reservation Rejected
Reservation Cancelled
Announcements
Announcement
Fire Drill
Send username and password to colleague via e-mail
SAVE
RETURN TO LIST

Adding a Colleague

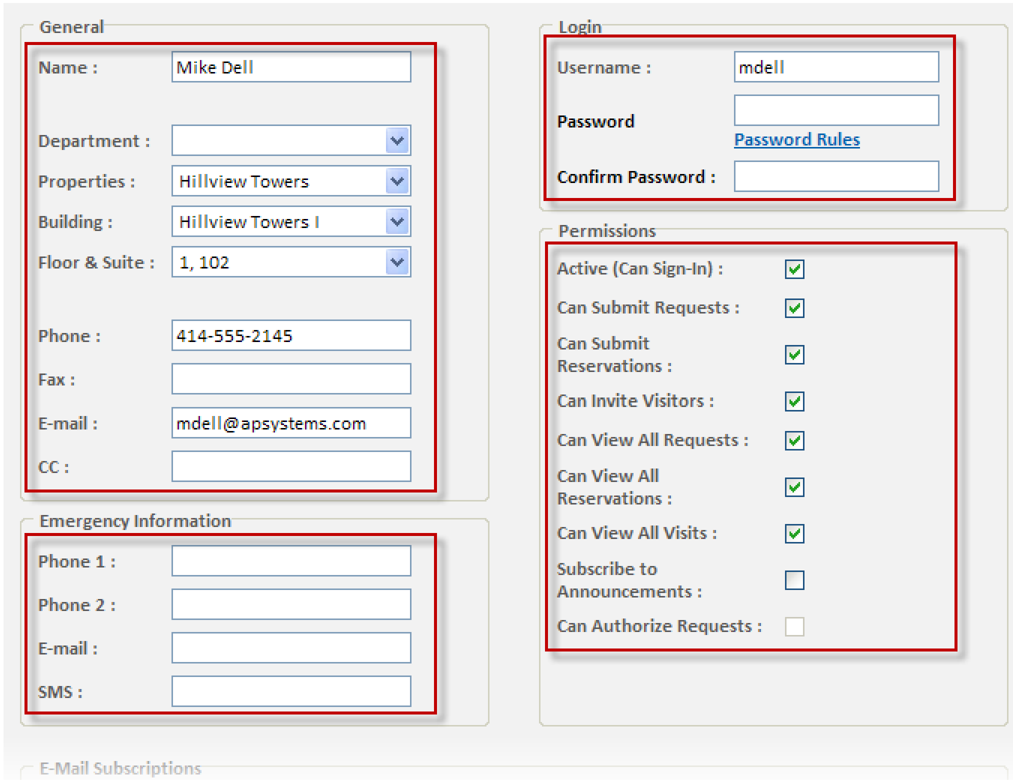
To add a colleague as a contact in the TSI:

1. Click **New Colleague** in the Administration section of the TSI menu, located on the left side of the screen. The Contact Entry screen is displayed.

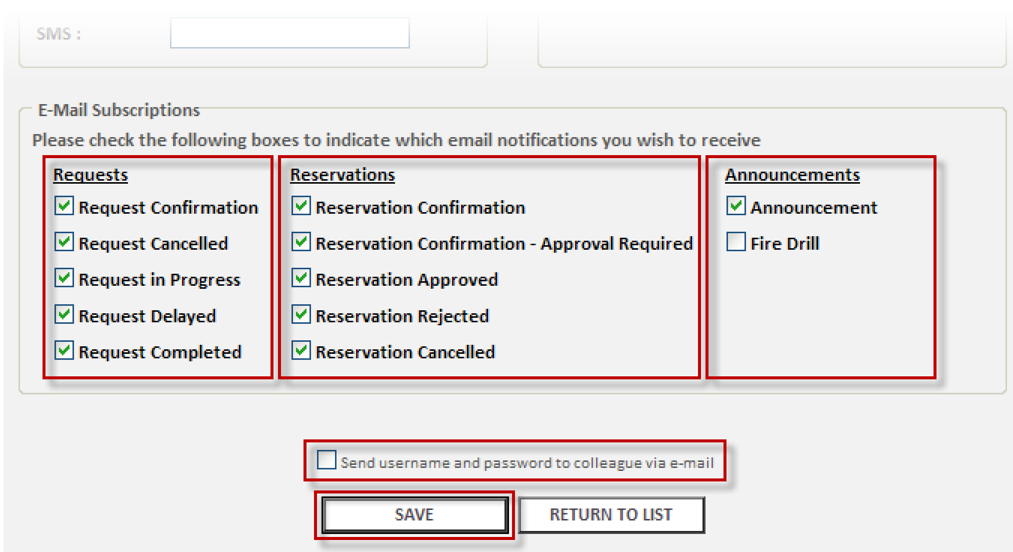


2. The General Information section contains contact and location information. The following information can be added in this section:
    - Name
    - Property
    - Building
    - Floor & Suite
    - Phone number
    - Fax
    - Email
    - CC (used with service request and reservation notifications)
3. The Emergency Information section allows you to enter emergency contact information, which will be used to transmit emergency notifications.
4. The Login section allows you to create the username and password used to log in to the TSI.
5. The Permissions section allows you to set up the colleague's permissions.

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



7. 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, and Announcements).
8. If you set up a username and password for your colleague, place a checkmark beside **Send username and password...** if you would like to send the new login information by email.
9. When you are finished making changes, click **Save**.

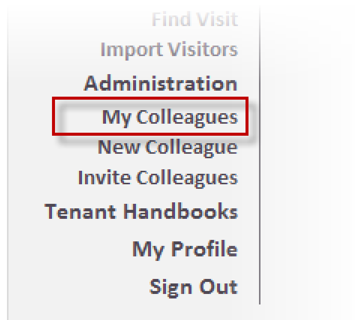


Deleting a Colleague

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

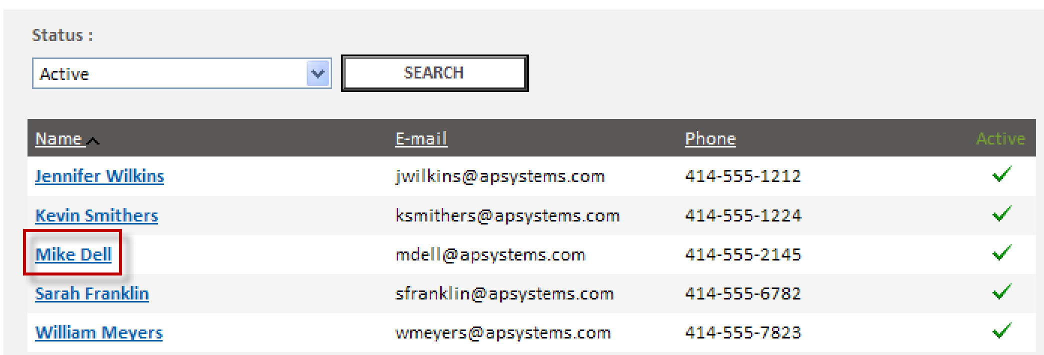
Deactivating a Colleague

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



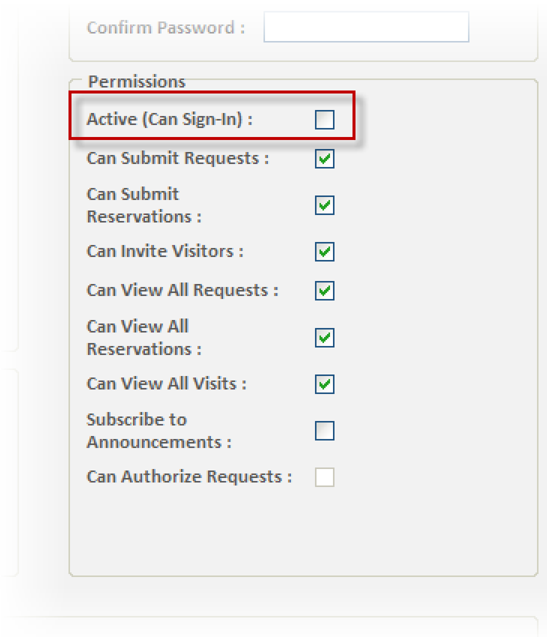
2. Select the colleague you would like to deactivate. The Contact Entry screen will be displayed.

> *i* The My Colleagues list can be 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.

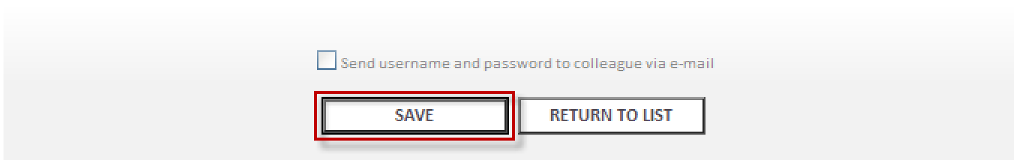


Name	E-mail	Phone	Active
Jennifer Wilkins	jwilkins@apsystems.com	414-555-1212	✓
Kevin Smithers	ksmithers@apsystems.com	414-555-1224	✓
Mike Dell	mdell@apsystems.com	414-555-2145	✓
Sarah Franklin	sfranklin@apsystems.com	414-555-6782	✓
William Meyers	wmeyers@apsystems.com	414-555-7823	✓

3. In the Permissions section, remove the checkmark beside **Active (Can Sign-In)**.


Confirm Password :
Permissions
Active (Can Sign-In) :
Can Submit Requests :
Can Submit Reservations :
Can Invite Visitors :
Can View All Requests :
Can View All Reservations :
Can View All Visits :
Subscribe to Announcements :
Can Authorize Requests :

7. Click **Save**.


Send username and password to colleague via e-mail
SAVE
RETURN TO LIST

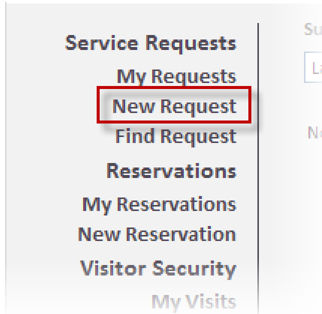
Tenant Service Requests

About Tenant Service Requests

Your Property Management Company has provided you with a Tenant Services Interface for entering and tracking your service requests on-line. This feature improves your communication with your Property Management Company and promotes faster service.

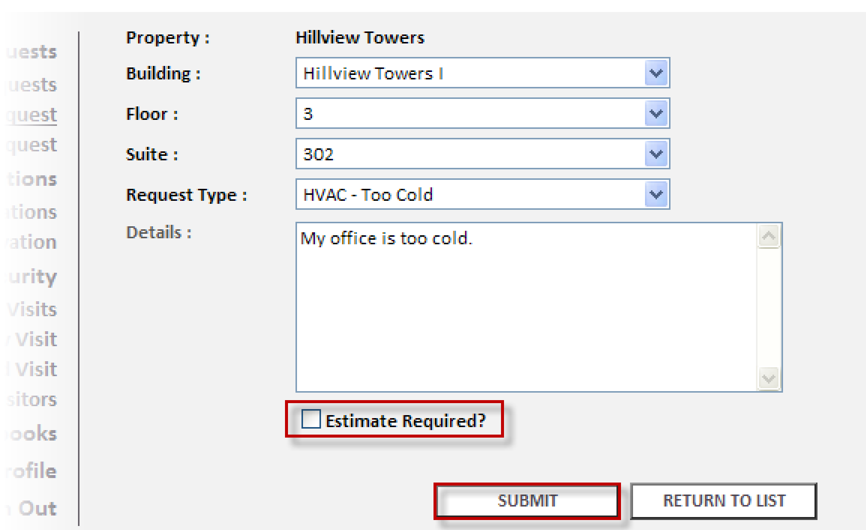
Making a Request

1. Click **New Request** in the main menu. The Service Request Entry screen is displayed.



2. The system automatically selects your property in the **Property** drop-down.
3. Some tenants may be configured to enter Requests for more than one building. In this case there will be a **Building** field on the Service Request Entry screen. To select a building for the location of the request, click the **Building** field and select the desired building from the drop-down list.
4. Use the **Floor** and **Suite** drop-down lists to select a floor and suite.
5. Click the **Request Type** field and select a request type from the drop-down menu.
6. Click the **Details** field and enter the details of the request.
7. Indicate if an estimate is required using the checkbox provided.
8. Click **Submit**. Your request is submitted and the Request Confirmation screen is displayed.

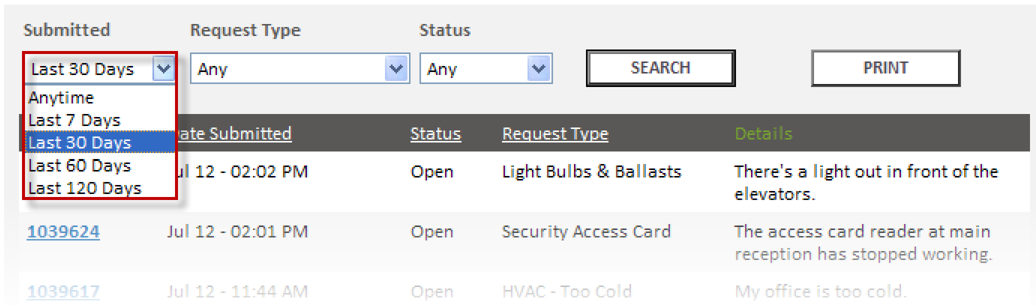
i if your property uses the Authorization feature, your request may require authorization before it can be processed. The system will display a message informing you that authorization is required.



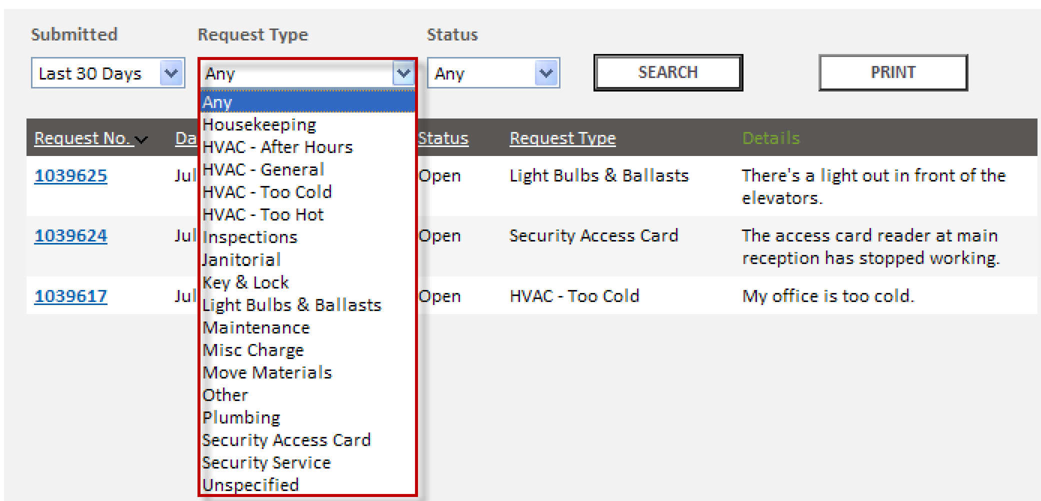
Finding a Request

Requests can be easily located on the **My Requests** screen, accessed from the menu on the left.

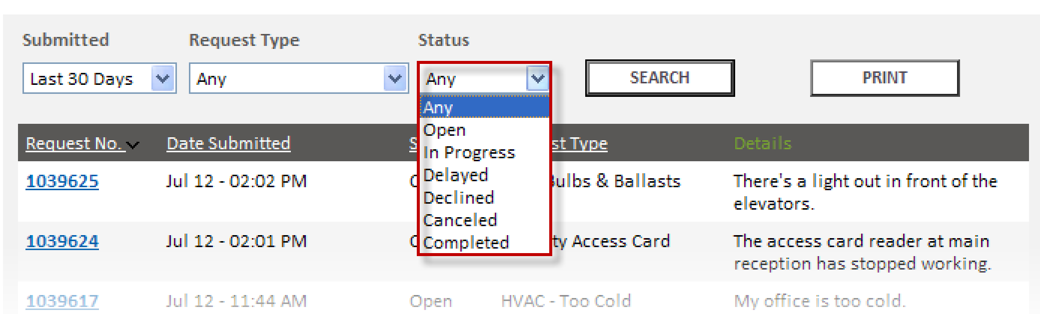
1. By default, the system displays requests submitted in the last 30 days, of any request type and any status. To change the time-frame, click the **Submitted** drop-down and select the desired time frame.



2. To change the request type, click the **Request Type** drop-down and select the desired type.



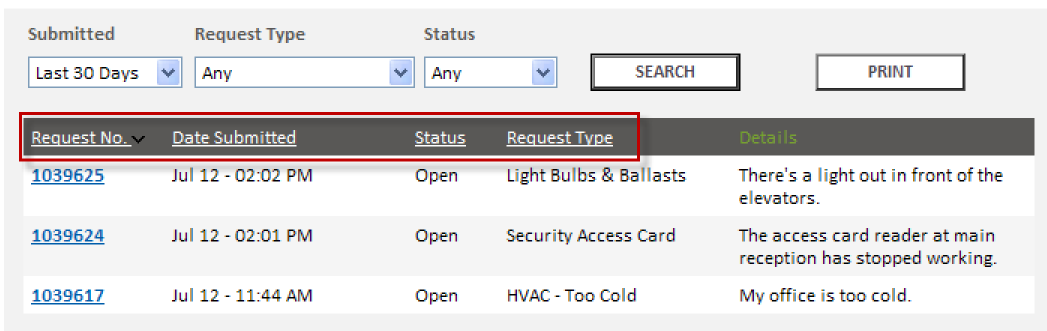
3. To change the status, click the **Status** drop-down and select the desired status.



4. Click the **Search** button. Requests matching the selected criteria are displayed on the My Service Requests screen.

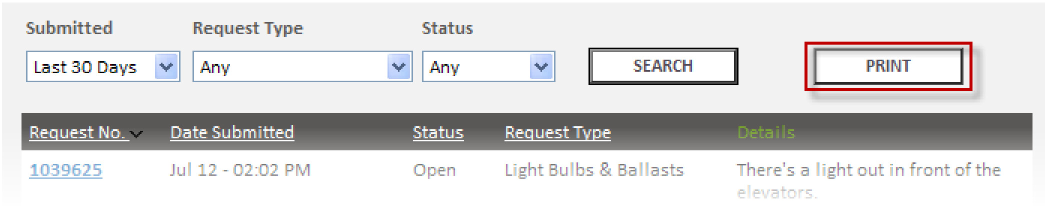
Organizing My Service Requests

1. By default, the system organizes the Requests by Request Number in descending order (highest to lowest). To change the order of requests by Request Number, click **Request No.** The requests are displayed in ascending order (lowest to highest) by Request Number.
2. To organize the requests by date received, click **Date Submitted**. The requests are displayed in descending order. To display the requests in ascending order, click **Date Submitted** again.
3. To organize the requests by status, click **Status**. New requests are displayed at the top of the list, followed by open and completed requests. To display completed requests at the top of the list, click **Status** again.
4. To organize the requests by request type, click **Request Type**. The requests are displayed by request type in ascending alphabetical order. To organize the requests by request type in descending alphabetical order, click **Request Type** again.



Printing Request Lists

Tenants can now print a list of their requests. To print the list of service requests, click **Print** on the View Service Requests screen.



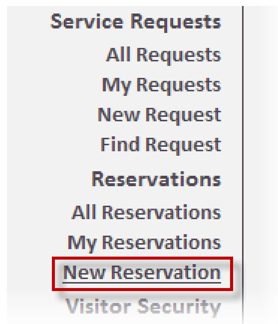
Resource Reservations

About Resource Reservations

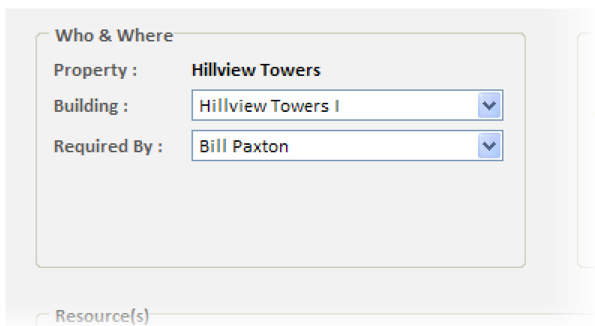
Resource Reservations simplifies, streamlines and optimizes the reservation process for all of your building's amenities. Using your property's Tenant Services Interface, you can book and track the resources your building has to offer.

Making a New Reservation

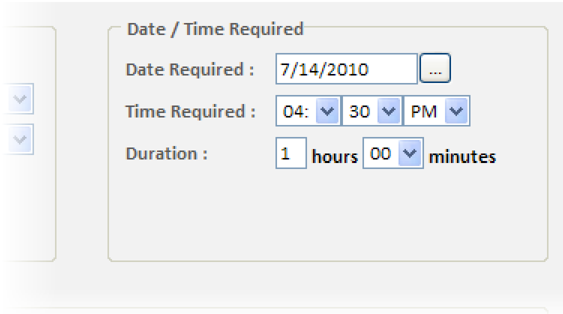
1. Select **New Reservation** from the main menu. The Reservation Wizard is displayed.



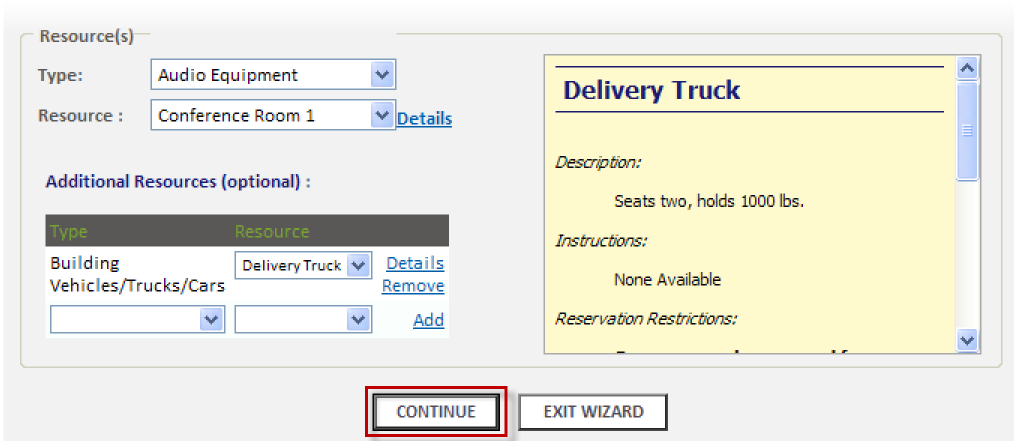
2. The **Who & Where** section determines who requires the reservation and where the resource is required. To select the building, click the **Building** field and select the desired building from the drop-down list.
3. By default, the system displays your name in the **Required By** field. If the resource is required by someone else, click the **Required By** field and select your colleague's name from the drop-down list.



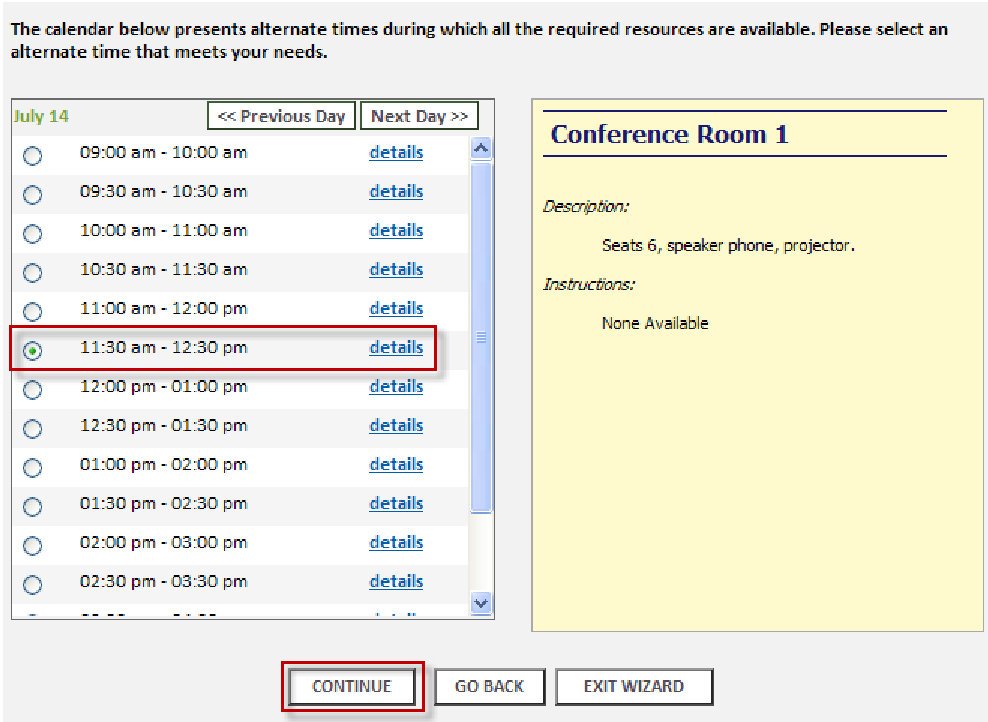
4. The **Date and Time Required** section determines the day and time that the resource is required and how long it is needed. To select the date required, select the desired date from the calendar. Or, click the **Date Required** field and enter the date.
5. To select the time required, click the **Time Required** fields and select the hour and minutes from the drop down lists. Then click the **AM/PM** field and select if the desired time is AM or PM.
6. Enter the duration that the resource is required in the **Duration** field.



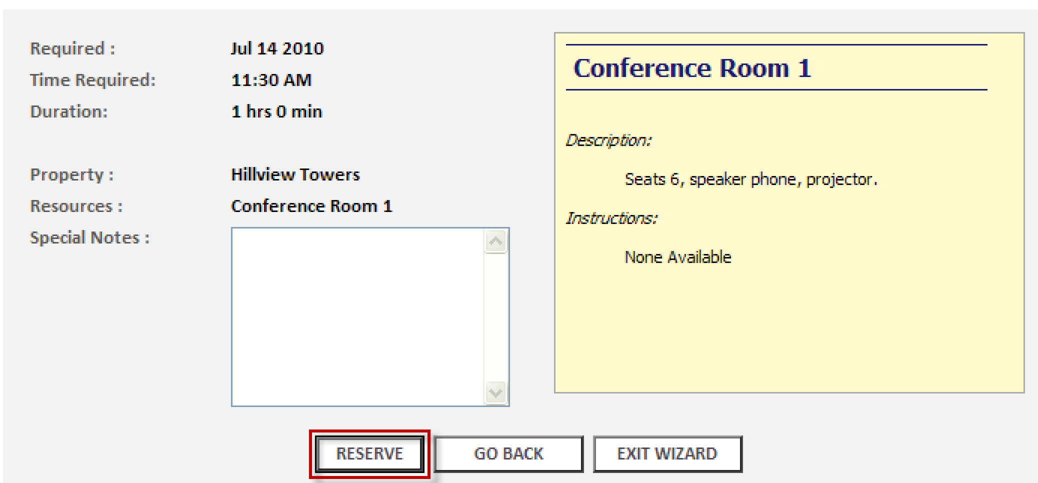
7. Select the type of resource that is required in the Resources section. To select the type of resource, click the **Type** field and select the type of resource from the drop-down list.
8. The system searches for available resources of the selected type. By default, the system displays "Any Available" in the Resource field. To select from the available resources, click the **Resource** field and select the desired resource.
9. Once selected, notice the information that is displayed to the right of your selection. These details will help you to select a resource.
10. Your property may associate resources that are commonly used together. This makes it easier for you to reserve all the resources you need at once. To view the details of an additional resource, click **Details**. If you do not wish to reserve this resource, click **Remove**. If you would like to search for an additional resource, click **Add**.
11. When all selections are made click **Continue**. The system checks the availability of the resources you have selected.



12. If there is a conflicting reservation already in the system, a warning message such as the one below displayed. Consult the error message and make new selections for your reservation. When you have changed your selections, click **Continue**.
13. When the resource you have selected is reserved at the selected time, the system will display a list of alternative days and times when the resource is available, as shown in the example below. Click another desirable time and then click **Continue**.

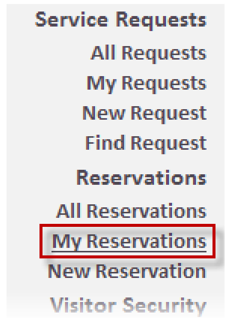


14. Enter any special notes that may be required in the **Special Notes** section.
15. Click **Reserve**. The Reservation Confirmation screen is displayed.

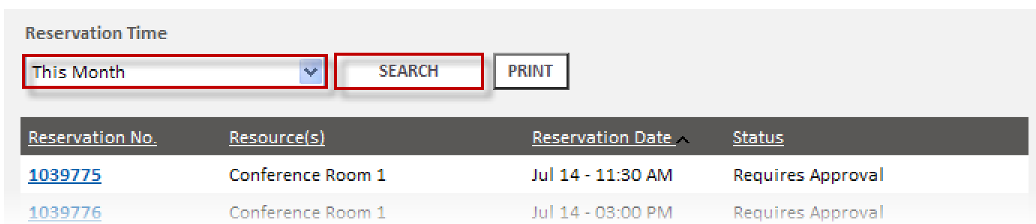


Finding Reservations

1. Select **My Reservations** from the main menu.



2. By default, the system displays all your reservations for this month. To display another time frame, click the **Reservation Time** field and select the desired time frame from the drop-down menu.
3. Click **Search**. The results are displayed.

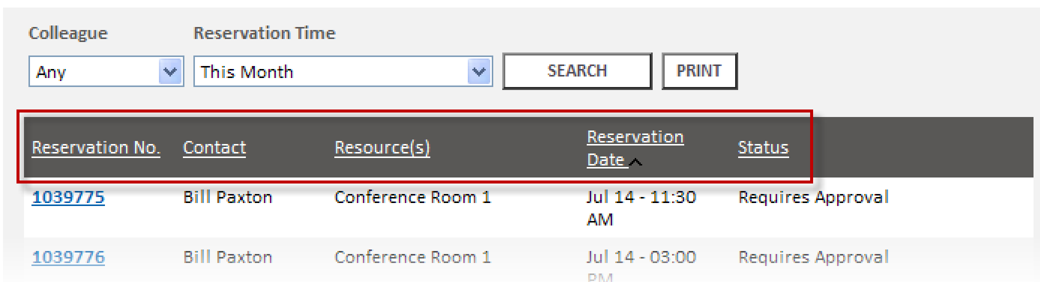


Organizing the Reservation List

The Reservation List can be easily sorted by clicking the list headings.

By default, the list is organized by **Reservation Number**, in descending order (highest to lowest).

- To organize the list in ascending order (lowest to highest) by reservation number, click **Reservation No**.
- To sort the list by contact in ascending alphabetical order, click **Contact.**
- To sort the list by resource type in ascending alphabetical order, click **Resource Type**.
- To sort the list by reservation date ascending order, click **Reservation Date**.
- To sort the list by status type in ascending alphabetical order, click **Status**.

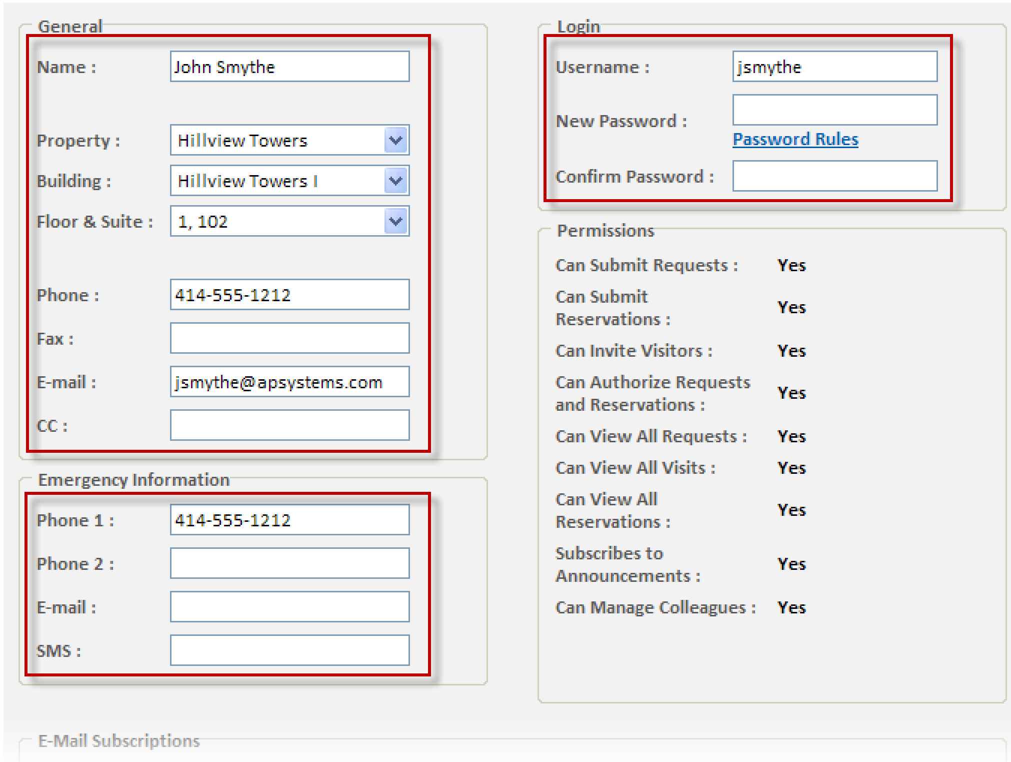


My Profile

Changing Your Profile

The My Profile screen allows you to manage the information associated with your login account.

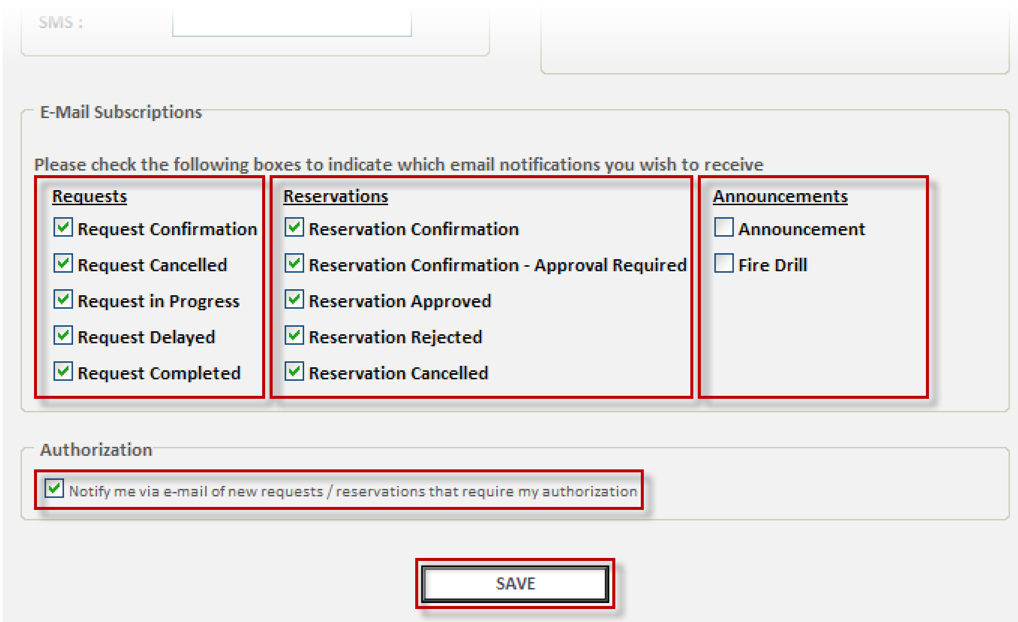
1. The General Information section contains contact and location information. The following information can be changed in this section:
    - Name
    - Property
    - Building
    - Floor & Suite
    - Phone number
    - Fax
    - Email
    - CC (used with service request and reservation notifications)
2. The Emergency Information section allows you to enter emergency contact information, which will be used to transmit emergency notifications to you.
3. The Login section allows you to modify the username and password you use to log in to the TSI.



4. 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".

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


SMS :
E-Mail Subscriptions
Please check the following boxes to indicate which email notifications you wish to receive
Requests
Request Confirmation
Request Cancelled
Request in Progress
Request Delayed
Request Completed
Reservations
Reservation Confirmation
Reservation Confirmation - Approval Required
Reservation Approved
Reservation Rejected
Reservation Cancelled
Announcements
Announcement
Fire Drill
Authorization
Notify me via e-mail of new requests / reservations that require my authorization
SAVE