Vendor Manager User Guide

Managing assigned tasks and employee access
from the web and mobile application

Table of Contents

Overview

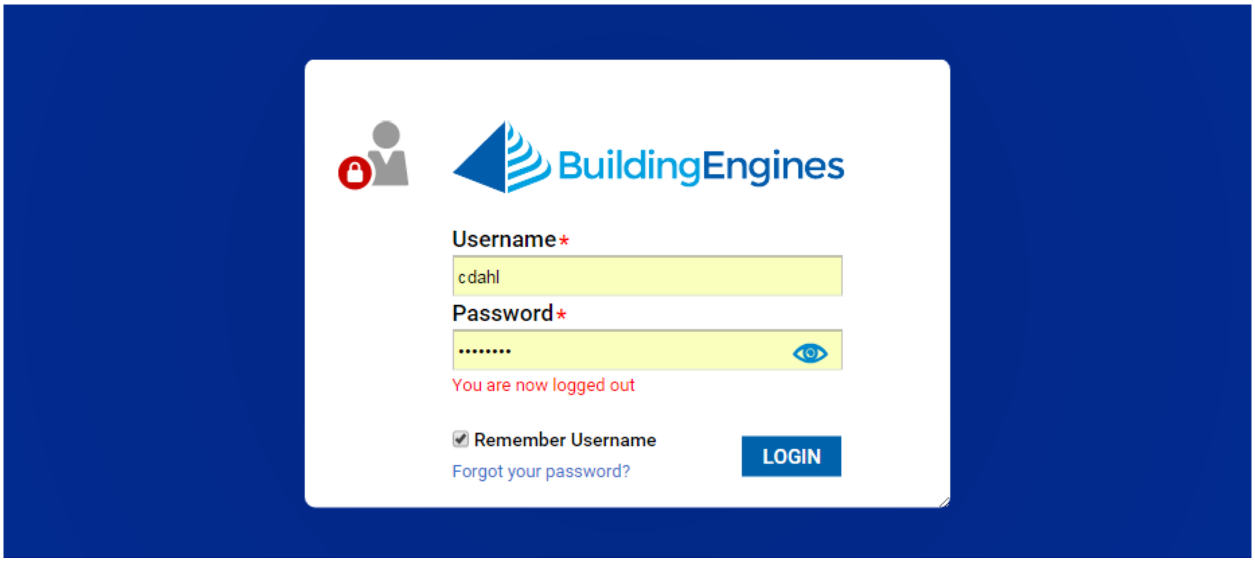
The Vendor Manager portal allows vendor managers to oversee their company's assigned tasks and employee access. This guide describes the process of accessing the application, updating assigned tasks, and managing employee access from the desktop and mobile application.

Logging into Building Engines

This section describes the process of logging into the Vendor Manager portal of the application.

To access the Building Engines vendor portal:

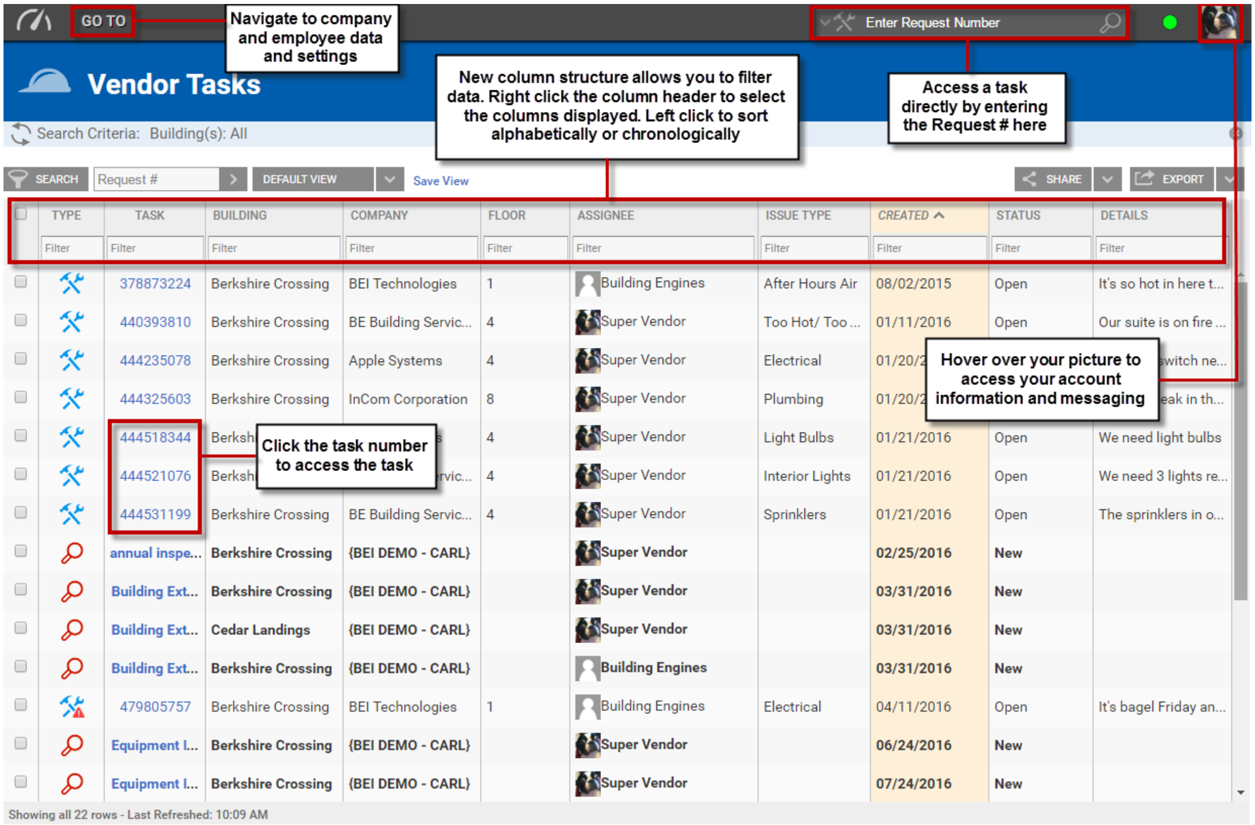
1. Navigate to http://buildingengines.com/login.
2. Enter your username and password.



3. Click **Login**.

Navigating the Vendor Portal Grid

The vendor portal grid allows you to quickly identify your company's workload, manage user access, and stay connected to Property Management personnel.



Go To Menu

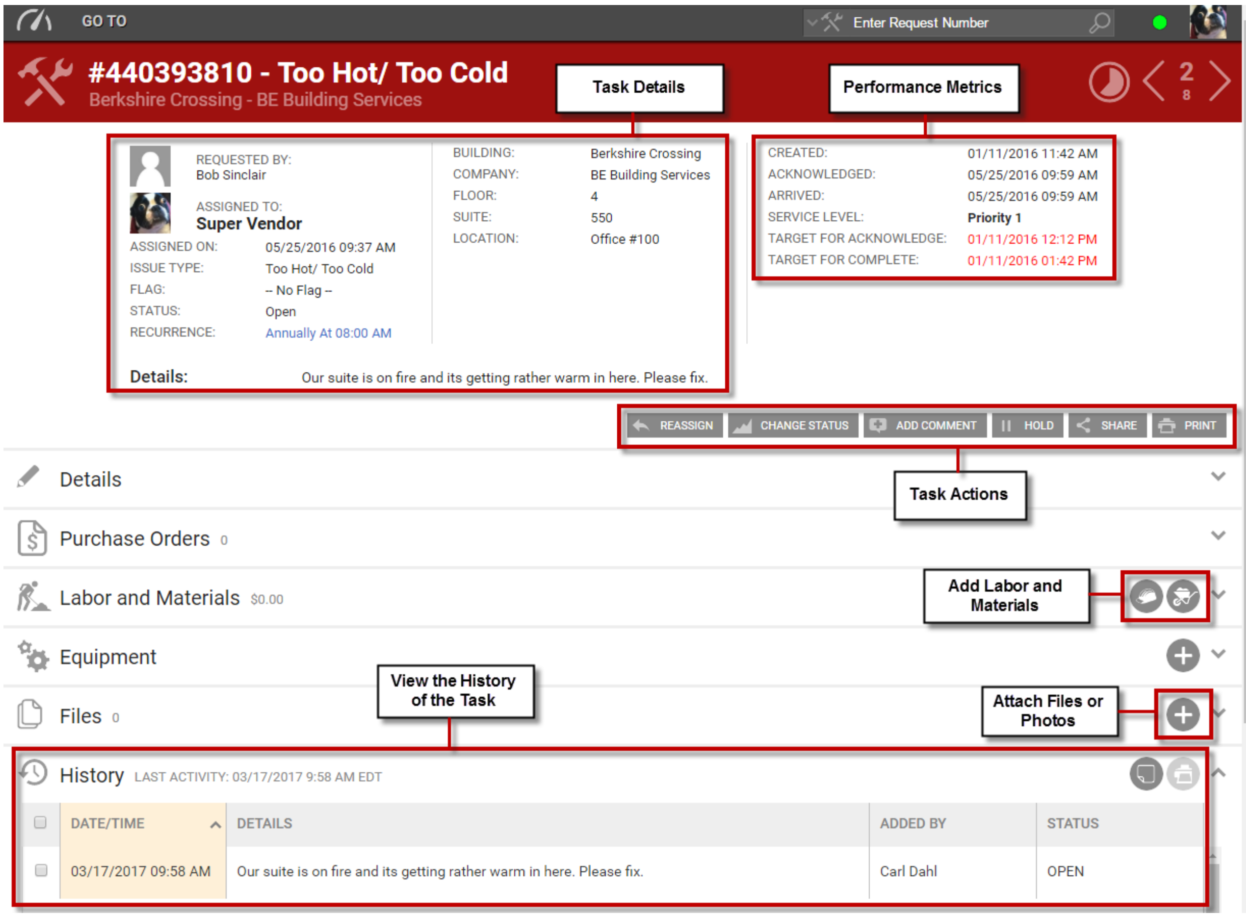
- ➢ Edit your company contact information
- ➢ Edit Employee information and access

Task Grid

- ➢ Oversee and manage company workload
- ➢ Search, sort, export, and access tasks assigned to your company

Navigating Around a Task

The following image demonstrates where you can find task information and actions.



Top Section

- ➢ Task details
- ➢ Performance metrics

Middle Section

- ➢ Task actions such as reassign, task completion, comments, labor and materials
- ➢ Attach files and photos

Bottom Section

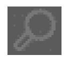
- ➢ Task and messaging history

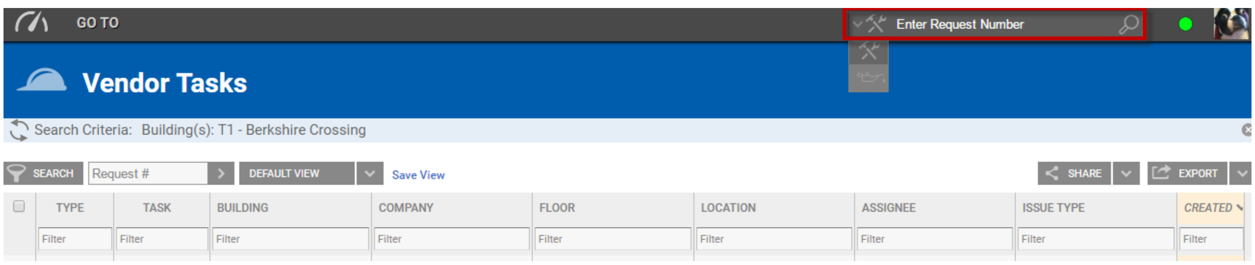
Managing Tasks

This section describes the process of managing tasks assigned to your company.

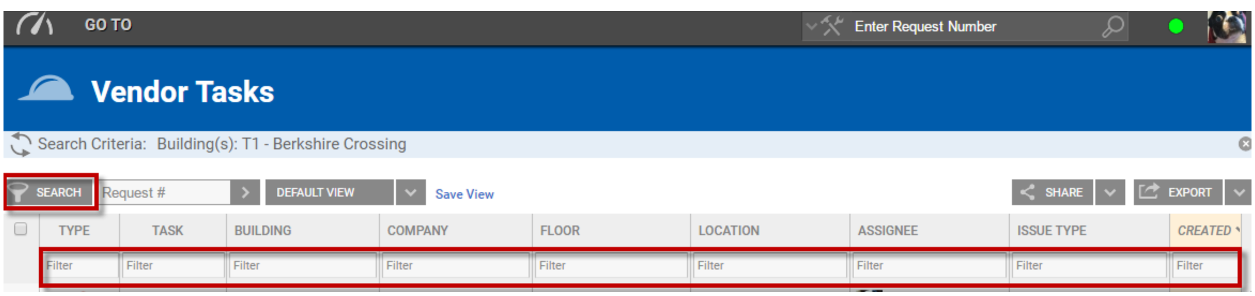
Searching for a Task

Tasks can be located by entering the task number into the Request # field or by using the SEARCH and/or column filters. This section describes the process of searching for a task.

By Request #: Enter the task number into the **Enter Request Number** field, select the task type, and click .



Search: Use the **SEARCH** and/or column filters to locate the task type and number.



Reassigning a Task

This section describes the process of reassigning a task to another employee at your vendor company.

To reassign a task:

1. Use the **SEARCH** and/or column filters to locate and access the task.
2. Click .

3. Select an assignee and notification method.
4. Click **SAVE**.

Completing a Task

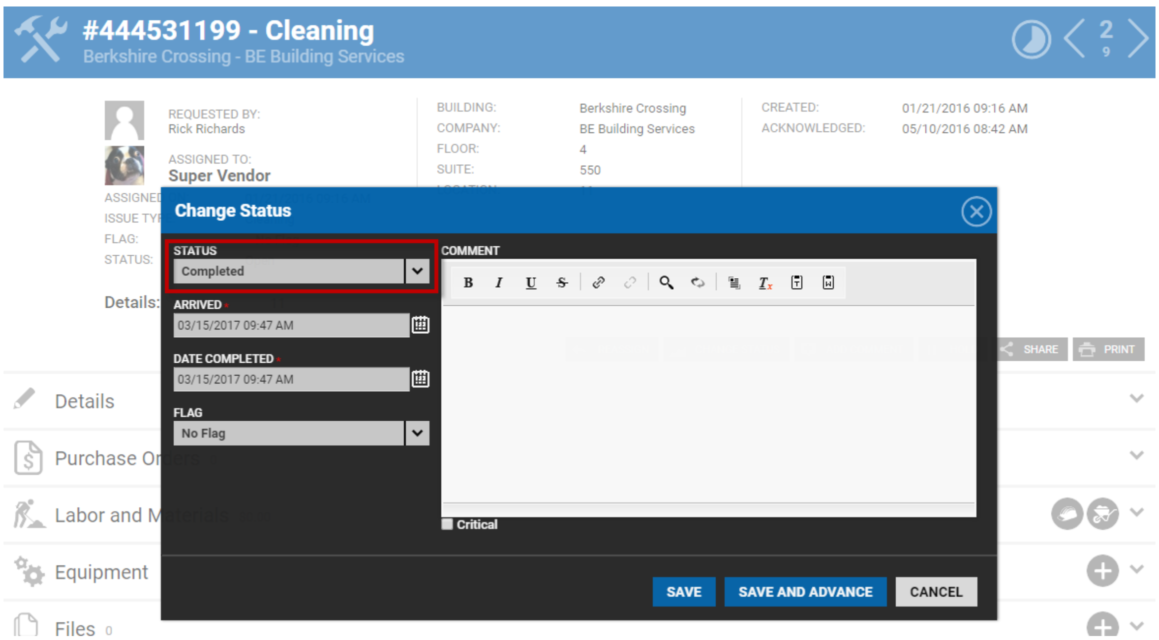
After completing a task you need to update the status in the application to complete. This section describes the process of completing a task.

To complete a task:

1. Use the **SEARCH** and/or column filters to locate and access the task.
2. Click 

.
3. Using the **STATUS** field, select **Completed**.

*Note: If **ARRIVED** was not previously entered, it defaults with the **COMPLETED** time. To edit either, click the field and use the calendar icon to update*.



4. (Optional) Enter a comment.
5. Click **SAVE** or **SAVE AND ADVANCE** to proceed to the next task.

Adding a Comment to a Task

This section describes the process of adding a comment to a task.

To add a comment to a task:

1. Use the **SEARCH** and/or column filters to locate and access the task.
2. Click 

.
3. Enter your comment and click **SAVE**.

Putting a Task on Hold

Marking a work order as on-hold allows you to pause the ongoing clock, or task timer. The Hold functionality is most commonly used when parts are on order or work cannot be completed for reasons beyond your control. This section describes the process of putting a work order on hold.

Note: The Hold functionality is specific to work order tasks.

To put a work order on hold:

1. Use the **SEARCH** and/or column filters to locate and access the task.
2. Click 

.
3. Enter a **COMMENT** and click **SAVE**.

Sharing a Task

The Share functionality allows you to send a message to a colleague or member of the property management team with an attachment of the task being referenced. This section describes the process of sharing a task.

To share a task:

1. Use the **SEARCH** and/or column filters to locate and access the task.
2. Click 

.
3. Select your recipients and click **SEND**.

Printing a Task

This section describes the process of printing a task.

To print a task:

1. Use the **SEARCH** and/or column filters to locate and access the task.
2. Click 

and a new page opens.
3. Click  and select your printing preferences.
4. Click **Print**.

Completing Steps on a Task

If a preventive maintenance task includes required steps, each step requires either a DONE or N/A before the task can be completed. This section describes the process of completing task steps individually and as a group.

Note: This functionality is specific to Preventive Maintenance (PM) tasks.

To complete a PM task:

1. Use the **SEARCH** and/or column filters to locate and access the task.
2. Navigate to the **Steps** section and click either DONE or N/A for each step.

   Note: To check all the steps as either DONE or N/A in one click, click the hyperlinked ***DONE*** *or* ***N/A***.

3. Repeat step 2 for each of the task's steps.

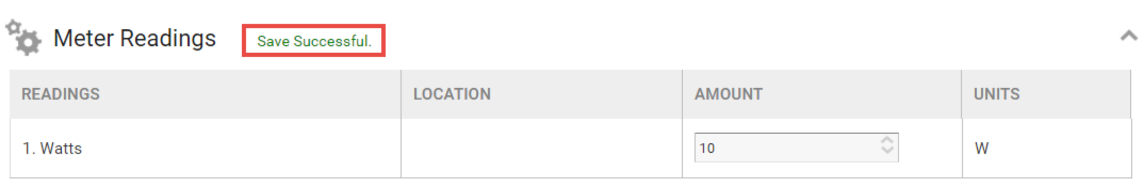
Entering Meter Readings on a Task

In some instances, a preventive maintenance task may require you to enter meter readings. Meter readings above or below the acceptable range are displayed in a red font. This section describes the process of completing a task's meter readings.

Note: This functionality is specific to Preventive Maintenance.

1. Use the **SEARCH** and/or column filters to locate and access the task.
2. Navigate to the **Meter Readings** section and enter the **AMOUNT** for each reading.

   Note: Meter readings are automatically saved once you click outside of the field.



Adding Labor to a Task

This section describes the process of adding labor to a task.

To add labor to a task:

1. Use the **SEARCH** and/or column filters to locate and access the task.
2. Navigate to the **Labor and Materials** section and click .

3. Using the Add Labor pop-up, select the **NAME** of the person who did the labor and enter the **HOURS**.
4. (Optional) Use the available fields to enter any other information you have regarding the labor.
5. Click **SAVE** to have the labor applied to the task.

Adding Material to a Task

This section describes the process of adding a material to a task.

To add a material to a task:

1. Use the **SEARCH** and/or column filters to locate and access the task.
2. Navigate to the **Labor and Materials** section and click .

3. Using the Add Material pop-up, select the **MATERIAL** and enter the **AMOUNT**.
4. (Optional) Use the available fields to enter any other information you have regarding the material.
5. Click **SAVE** to have the material applied to the task.

Linking a Task to a Piece of Equipment

If you are able to determine that a faulty piece of equipment is responsible for the work needed, you can link a work order to the equipment record. This section describes the process of linking a piece of equipment to a work order.

Note: This functionality is specific to work orders.

To link a piece of equipment to a work order:

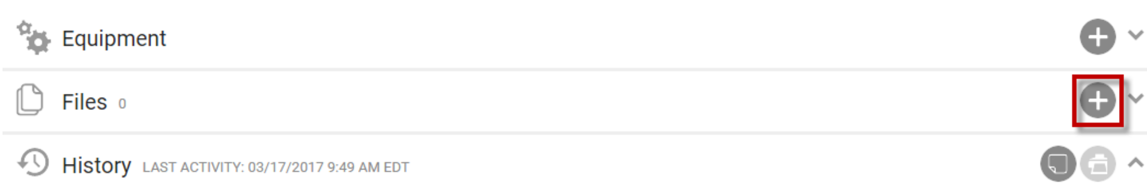
1. Locate and open the work order.
2. Click the located in the **Equipment** section.
3. Enter the name, serial number, or asset tag of the piece of equipment. As you type, the application auto-suggests possible equipment matches.
4. Use the **Problem** field to explain why you are linking the work order to the equipment record.
5. Click **SAVE** to finish or **SAVE AND ADD ANOTHER** to link another piece of equipment.

Adding a File to a Task

Files can be attached to work orders, preventive maintenance tasks, and inspections. This section describes how to add a file or photo to a task or inspection.

To add a file to a task:

1. Locate and open the work order.
2. Click in the **Files** section.



3. Click **ADD FILES**, or drag and drop the file into the **Upload New File(s)** box.
4. (Optional) To make the file accessible to tenants, click **Display to Tenants**.
5. Click **SAVE**.

Vendor Administration

This section describes the process of updating your company's contact information, creating new system users, and managing user accounts.

Updating Company Contact Information

Changes to your company's contact or billing information should also be updated in the Building Engines application. This section describes the process of updating your company's contact information.

To update your company's contact information:

1. Click **Go To > Edit Company Info**.
2. Use the available fields to update information such as **NAME**, **ADDRESS**, and **EMAIL**.
3. Click **SAVE** to finish.

Creating a New Vendor Employee

This section describes the process of creating a new vendor employee.

To create a new system user:

1. Click **Go To > Edit Employees**.
2. Click .
3. Select a **USERNAME** scheme.

   Note: Username scheme can either be the user's email address or first initial + last name.
4. (Optional) Click **"Send Welcome Email"** to send the user an activation link when the account is finished being created.
5. Enter the **FIRST NAME**, **LAST NAME**, and **EMAIL**.
6. (Optional) Use the available fields to enter the person's information.
7. Select the **BUILDING(S)** the user is linked to.
8. (Optional) Click **Assignable** if the person can be assigned tasks.
9. (Optional) Click **User can be messaged** if you want the system to send the user task related messaging.
10. Click **SAVE** to finish creating the new user account.

Updating a Vendor Employee

This section describes the process of updating a user's account.

To update a user's account:

1. Click **Go To > Edit Employees**.
2. From the Vendor Employees grid, select the **NAME** of the user you want to edit. The following actions can be performed from this page:
    - **Edit**: Use the available to fields to update the user's record.
    - **Reset Password**: Send a password reset email to the user.
    - **Change Password**: Manually change the password for the user.
    - **Inactivate**: Click to inactivate the user's account.
3. Click **SAVE**.

BE Mobile Application

The mobile application allows you to remotely manage tasks and stay connected to the Property Management team while you are away from your computer. If work is performed while outside of a cellular or Wi-Fi connection, once reconnected, tasks will be dated and time stamped when the work occurred. This section describes the process of managing and updating tasks using the mobile application.

Getting Started

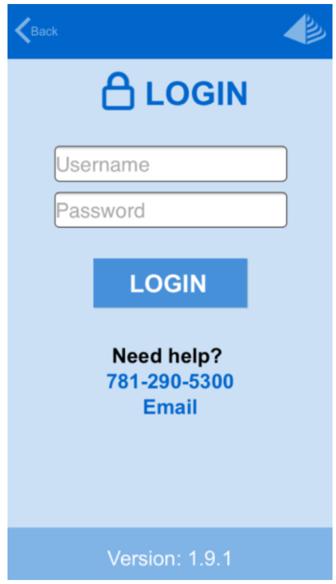
Before logging into the mobile application for the first time, seek out a location that has either has a good cellular or Wi-Fi connection. Failure to do so may result in an extended initial download time.

Logging In

To login into the Building Engines Mobile application:

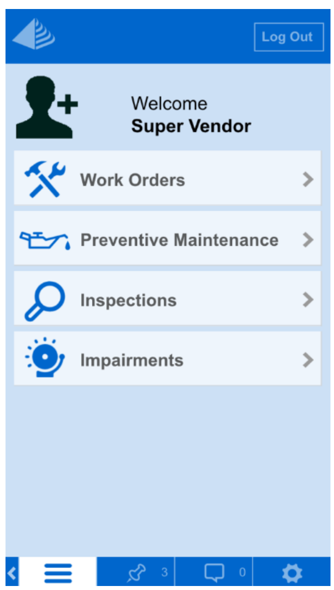
1. Navigate to the Building Engines icon on your smartphone.
2. Click **Login**.
3. Enter your username and password.

4. Click **LOGIN**.



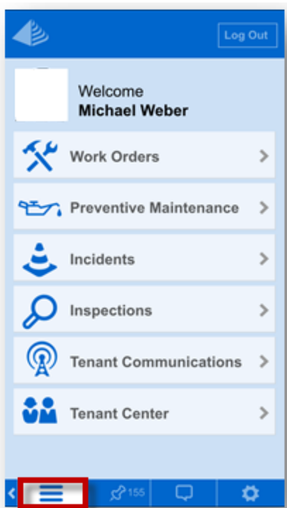
Module Navigation

After you have logged into the application, and depending upon your system role, you are provided with a set of module specific navigational buttons. Using these buttons, you can quickly access Work Orders, Preventive Maintenance, Inspections, and Impairments.

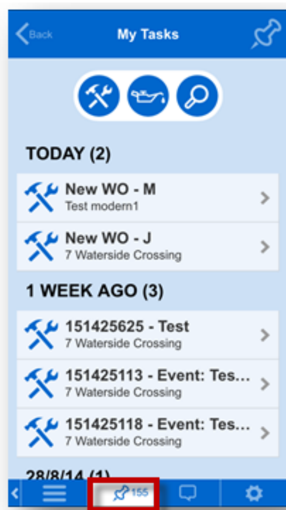


Inter-Application Navigation

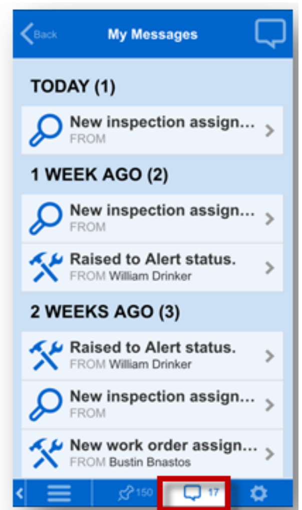
Located along the bottom of the mobile application are the inter-application navigational buttons. Using the buttons highlighted below, you can quickly access the home screen, assigned tasks, and message feed.



- Home button



- My Tasks



- Message Feed

Work Orders (Mobile Application)

This section describes how to update and manage work orders from the mobile application.

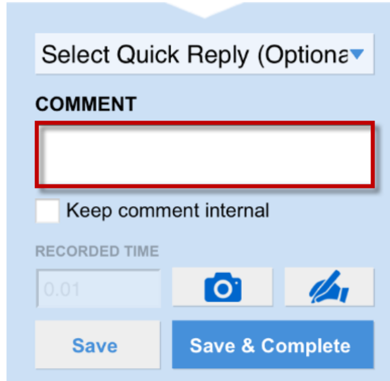
Adding a Comment to a Work Order

This section describes the process of adding a comment to a work order.

To add a comment to a work order:

1. Click **Work Orders > My Work Orders**.
2. Select a work order from the list.

3. Enter your comment into the **COMMENT** field.



4. (Optional) Click **Keep comment internal** to prevent the comment from appearing on the tenant interface.
5. Click **Save** or **Save & Complete**.

Adding a Photo to a Work Order

This section describes the process of adding a photo to a work order.

To add a photo to a work order:

1. Click **Work Orders > My Work Orders**.
2. Select a work order from the list.
3. Click the camera  icon.
4. Click either the **Take Camera Photo** or **Add From Gallery**.
   a. **Take Camera Photo**: Enables your smartphone's integrated camera.
   b. **Add From Gallery**: Allows you to access a previously taken photo from your smartphone's photo gallery.
5. Click **Use Photo**.
6. (Optional) Add a comment to the photo.
7. Click **Save**.

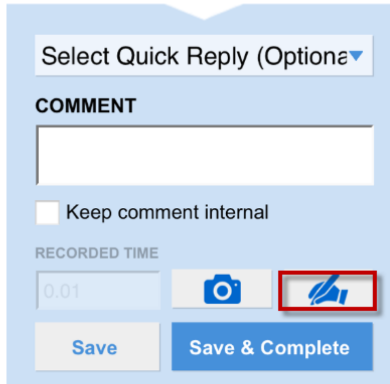
Adding a Signature to a Work Order

This section describes the process of adding a signature to a work order.

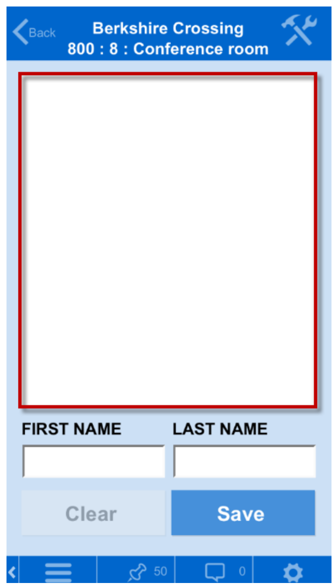
To add a signature to a work order:

1. Click **Work Orders > My Work Orders**.

2. Select a work order from the list.
3. Click the signature icon.



4. Using a stylus or fingertip, have the tenant enter their signature.



5. Enter the signature owners **FIRST NAME** and **LAST NAME**.
6. (Optional) To remove a signature, click **CLEAR**.
7. Click **SAVE**.

Reassignning a Work Order

This section describes the process of reassigning a work order.

Note: If you are unable to reassign from the mobile application, please reach out to Building Engines Support for assistance.

To reassign a work order:

1. Click **Work Orders** > **My Work Orders**.

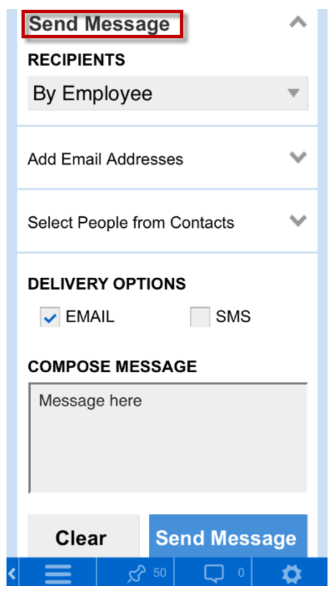
2. Select a work order from the list.
3. Scroll down and click **Reassign Task**.
4. Using the **ASSIGN TO** field, select an assignee.
5. (Optional) Enter a comment for the new assignee.
6. (Optional) Click **Keep comment internal** to prevent comment from appearing on tenant interface.
7. Select a notification method and click **Reassign Task**.

Sending a Message from within a Work Order

This section describes the process of sending a message from within the work order.

To send a message:

1. Click **Work Orders > My Work Orders**.
2. Select a work order from the list.
3. Scroll down and click **Send Message**.



4. Select message recipients.
   a. **Filter By Contact Type**: Sorts contacts by system role.
   b. **Add Email Addresses**: Allows you to manually enter in email addresses.
   c. **Select People from Contacts**: Allows you to select message recipients from users within the application.
5. Select a method of delivery by clicking **EMAIL** or **SMS**.

6. Enter a message into the **COMPOSE MESSAGE** field and click **Send Message**.

Adding Labor to a Work Order

Billable and non-billable labor can be added to a work order. This section describes the process of adding labor to a work order.

To add labor to a work order:

1. Click **Work Orders > My Work Orders**.
2. Select a work order from the list.
3. Scroll down and click **Add Labor**.
4. Using the **HOURS** field, Enter the labor hours.

   Note: Partial hours must include a "0" before the decimal point. Ex: 0.5.
5. (Optional) Select a labor rate.
6. (Optional) Select an markup.
7. (Optional) Click **Billable** to make the labor billable.
8. Click **Add Labor**.

Adding a Material to a Work Order

Billable and non-billable materials can be added to a work order. This section describes the process of adding materials to a work order.

To add a material to a work order:

1. Click **Work Orders > My Work Orders**.
2. Select a work order from the list.
3. Scroll down and click **Add Material.**
4. Select a **CATEGORY.**
5. Select a **MATERIAL.**
6. Add material **QUANTITY.**
7. (Optional) Select an markup.
8. (Optional) Click **Billable** to make the material billable.
9. Click **Add Material**.

Viewing a File on a Work Order

This section describes the process of viewing files or photos linked to a work order.

To view a file linked to a work order:

1. Click **Work Orders > My Work Orders**.
2. Select a work order from the list.
3. Scroll down and click **Files**.
4. Select the file you want to view.
5. (Optional) Click **Add Photo** to either take a picture with your smartphone's camera or access a photo from your smartphone's photo gallery.
6. (Optional) If a photo was selected, click **SAVE**.

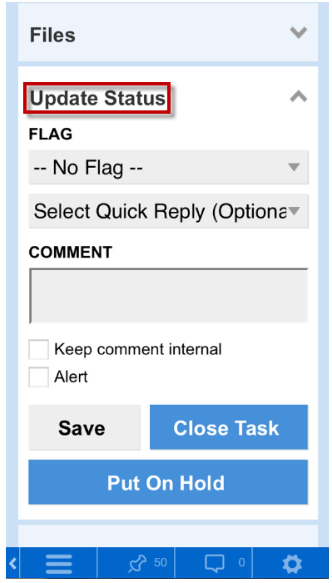
Updating the Status of a Work Order

This section describes the process of updating the status of a work order.

To update the status of a work order:

1. Click **Work Orders > My Work Orders**.
2. Select a work order from the list.

3. Scroll down and click **Update Status**.



4. (Optional) Click **Flag** to flag a work order.
5. (Optional) Click either **Select Quick Reply** or enter a comment into the **COMMENT** field.
6. (Optional) **Keep Comment Internal**: Prevents the comment from displaying on the tenant interface.
7. (Optional) **Alert**: This will turn the work order text red and add a red flag to the work order when displayed on the list or desktop grid.
8. Click either **Save** or **Close Task**.

Preventive Maintenance (Mobile Application)

This section describes the Preventive Maintenance (PM) functionality on the mobile application.

Adding a Comment to a PM Task

This section describes the process of adding a comment to a PM Task.

To add a comment to a task:

1. Click **Preventive Maintenance > My Tasks**.
2. Select a Preventive Maintenance task from the list.
3. Enter your comment into the **COMMENT** field.
4. Click **Save** or **Save & Complete**.

Adding a Photo to a PM Task

This section describes the process of adding a photo to a PM Task.

To add a photo to a PM task:

1. Click **Preventive Maintenance > My Tasks**.
2. Select a Preventive Maintenance task from the list.
3. Click the camera icon.
4. Click either the **Take Camera Photo** or **Add From Gallery**.
    a. **Take Camera Photo**: Enables your smartphone's integrated camera.
    b. **Add From Gallery**: Allows you to access a previously taken photo from your smartphone's photo gallery.
5. Click **Use Photo**.
6. (Optional) Add a comment to the photo.
7. Click **Save**.

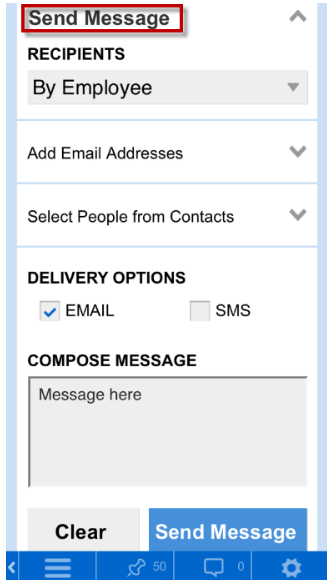
Sending a Message from within a PM Task

This section describes the process of sending a message from within the PM task.

To send a message:

1. Click **Preventive Maintenance > My Tasks**.
2. Select a Preventive Maintenance task from the list.

3. Scroll down and click **Send Message**.



4. Select message recipients.
   a. **Filter By Contact Type**: Sorts contacts by system role.
   b. **Add Email Addresses**: Allows you to manually enter in email addresses.
   c. **Select People from Contacts**: Allows you to select message recipients from users within the application.
5. Select a method of delivery by clicking **EMAIL** or **SMS**.
6. Enter a message into the **COMPOSE MESSAGE** field.
7. Click **Send Message**.

Adding a Material to a PM Task

This section describes the process of adding materials to your PM tasks.

To add a material to a PM task:

1. Click **Preventive Maintenance > My Tasks**.
2. Select a Preventive Maintenance task from the list.
3. Scroll down and click **Add Material**.
4. Select a **CATEGORY** and **MATERIAL**.
5. Enter a material **QUANTITY**.
6. (Optional) Select an markup.
7. Click **Add Material**.

Completing PM Task Steps

This section describes the process of completing a preventive maintenance (PM) task steps.

To complete the PM task steps:

1. Click **Preventive Maintenance > My Tasks**.
2. Select a Preventive Maintenance task from the list.
3. Scroll down and click on the **Steps** section.
4. If the task contains required steps, click either **DONE** or **N/A** for each step.
5. Click **Save Changes** once you are finished with the steps.

Viewing a File on a PM Task

This section describes the process of viewing files or photos linked to a PM task.

To view a file linked to a PM task:

1. Click **Preventive Maintenance > My Tasks**.
2. Select a Preventive Maintenance task from the list.
3. Scroll down and click **Files**.
4. Select the file you want to view.
5. (Optional) Click **Add Photo** to either take a picture with your smartphone's camera or access a photo from your smartphone's photo gallery.
6. (Optional) If you choose to add a photo, click **SAVE**.

Inspections (Mobile Application)

This section describes how to add a photo, send a message, and complete Inspection questions from the mobile application.

Adding a Photo to an Inspection Question

Photos may be required as an inspection answer, or as a supplement to your text based answer. This section describes the process of adding a photo(s) to an inspection question.

To add a photo to an inspection question:

1. Click **Inspections > My Inspections**.
2. Select an Inspection from the list.

3. Scroll down and click on the **Questions** section.

   Note: If an inspection includes many questions, this area may be broken down by Question Sections.

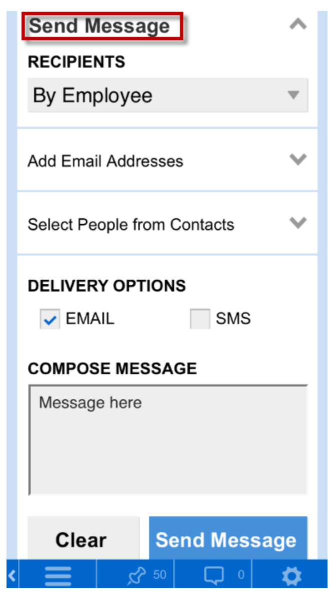
4. Locate the question you want to add a photo to and click the  icon.
5. Click either the **Take Camera Photo** or **From Gallery** to access your device's photo gallery.
   a. **Take Camera Photo**: Enables your smartphone's integrated camera.
   b. **Add From Gallery**: Allows you to access a previously taken photo from your smartphone's photo gallery.
6. (Optional) Add a comment to the photo.
7. Click **Save** to finish, or **Add More** to add additional photos to the inspection.

Sending a Message from within an Inspection

This section describes the process of sending a message from within the inspection.

To send a message:

1. Click **Inspections > My Inspections**.
2. Select an Inspection from the list.
3. Scroll down and click **Send Message**.



4. Select message recipients.
   d. **Filter By Contact Type**: Sorts contacts by system role.
   e. **Add Email Addresses**: Allows you to manually enter in email addresses.

   f. **Select People from Contacts**: Allows you to select message recipients from users within the application.

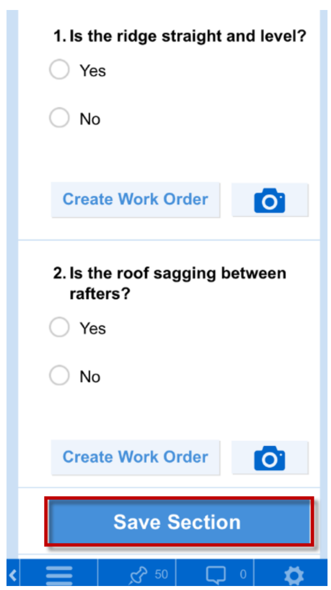
5. Select a method of delivery by clicking **EMAIL** or **SMS**.
6. Enter a message into the **COMPOSE MESSAGE** field.
7. Click **Send Message**.

Completing Inspection Questions

After **Start Work** is clicked on a new inspection the inspection's questions appear below the **Send Message** section. This section describes how to complete the inspection questions.

To complete the inspection questions:

1. Click **Inspections > My Inspections**.
2. Navigate to and click on the intended inspection.
3. Scroll down and click on the **Questions** section. Note: If question sections are present, click the section to view that sections questions.
4. (Optional) If you want to create a work order associated to the inspection, click **Create Work Order**.
5. (Optional) If you would like to add a picture to a inspection question, click the  icon.
6. Click **Save Section** once you are finished with a section.



7. Once all of the inspection questions have been completed, commit your time, and click **Complete Inspection**.

Adding a Photo to an Inspection

This section describes the process of adding a photo to an inspection.

To add a photo to an inspection:

1. Click **Inspections > My Inspections**.
2. Select an Inspection from the list.
3. Click the camera icon.
4. Click either the **Take Camera Photo** or **Add From Gallery**.
    c. **Take Camera Photo**: Enables your smartphone's integrated camera.
    d. **Add From Gallery**: Allows you to access a previously taken photo from your smartphone's photo gallery.
5. Click **Use Photo**.
6. (Optional) Add a comment to the photo.
7. Click **Save**.