Energy Services Platform: Manual for Tenant Office Manager

Welcome to the Energy Services Platform.

This manual will cover the functionalities of the Tenant Office Manager.

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To Access the Platform:

OPTION 1: Direct Link

Go to www.platform.geneaenergy.com. You will be directed to the login page.

OPTION 2: From your Android or iPhone

Go to your browser and type www.platform.geneaenergy.com.

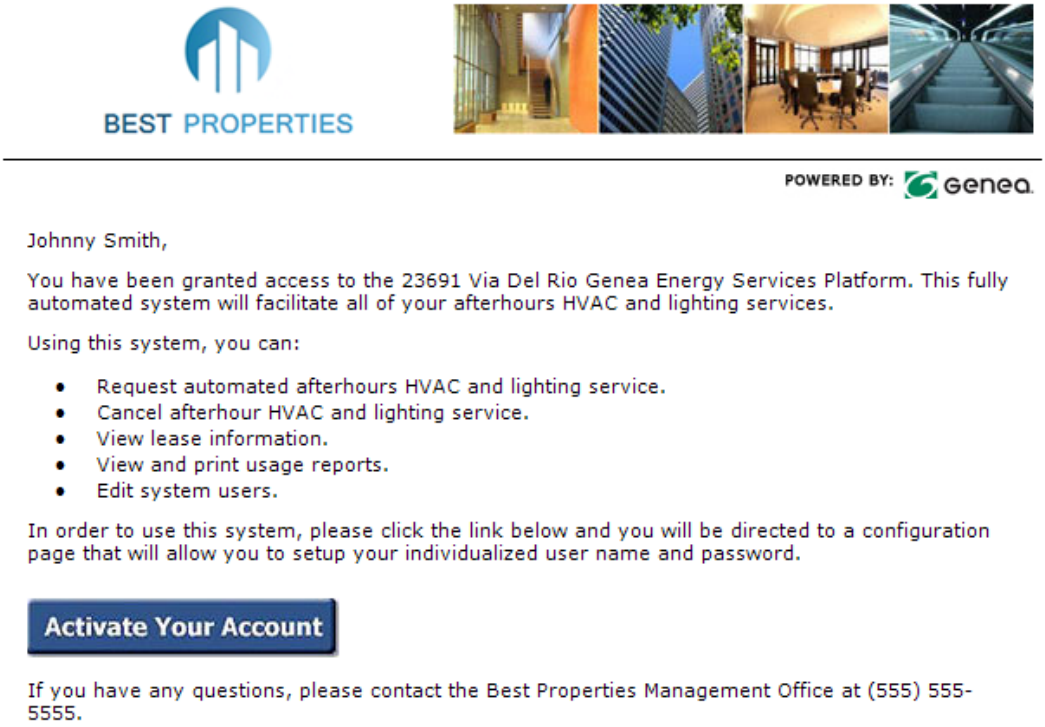
OPTION 3: Use the IVR

Dial 1-800-316-2419, and then enter your Area ID and User ID (information is in the welcome email)

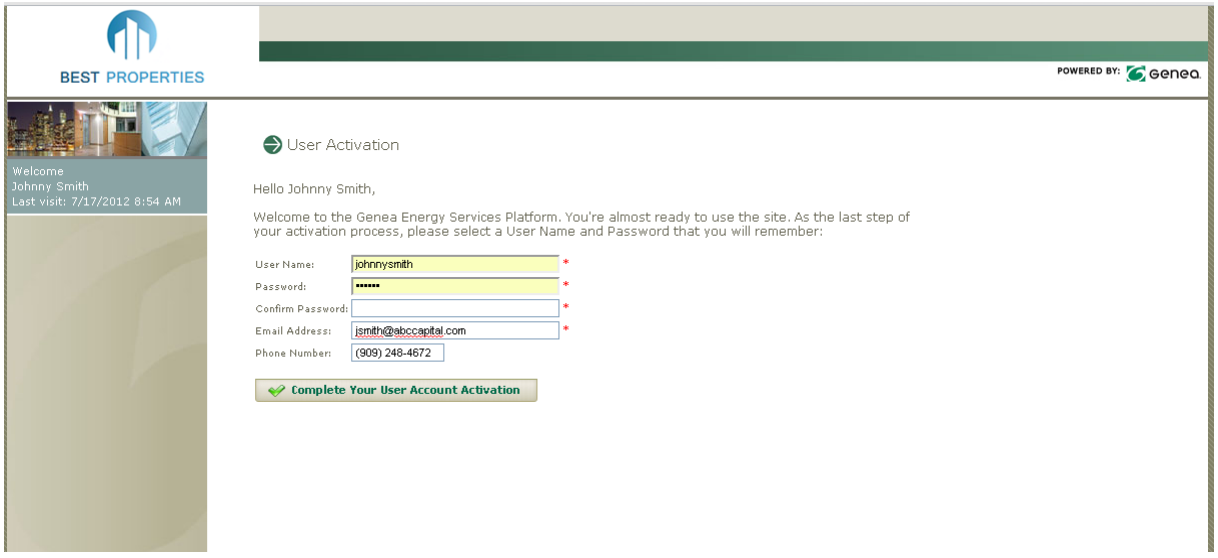
For further questions or assistance, please feel free to contact Genea Energy at 714-694-0536

Section 1: Getting Started

As a new user to the platform, you will receive a welcome email.



Click on "Activate Your Account" to continue. You will be directed to the User Activation page. Fill out your information and click on "Complete Your User Account Activation".



You will receive a confirmation email with the following information:

BEST PROPERTIES

POWERED BY: Genea

Johnny Smith,

Thank you for taking the time to register as an Office Manager. Your account is fully configured and ready to be used. For future reference, please find below your user name and password along with instructions for logging in.

User Name: jsmith
Password: [redacted]

Instructions for Access:

Internet:

1. Visit http://Platform.GeneaEnergy.com
2. Enter your user name and password.
3. Click HVAC & Light Service on the left menu.
4. Follow the instructions to obtain afterhours service.

Smart Phone: *(Apple & Android Operating Systems Only)*

1. Visit Platform.GeneaEnergy.com
2. Enter in your user name & password.
3. Press the [Login] Button.
4. Select an Area to control.
5. Press the [GO] button.
6. Enter request information.
7. Press the [Proceed with Request] Button.

Telephone:

1. Dial (800) 316-2419
2. When prompted enter the desired Area ID:

Area ID	Area Name
101 5606	Suite 105, Entire Suite
101 3218	Suite 105, Conference Room
101 1110	Suite 105, CEO's Office
101 8087	Suite 105, CFO's Office
101 7766	Suite 105, Marketing Office
101 6351	Suite 105, Accounting Office

3. When prompted, enter your User ID: 3[redacted]
4. Follow the instructions for service.

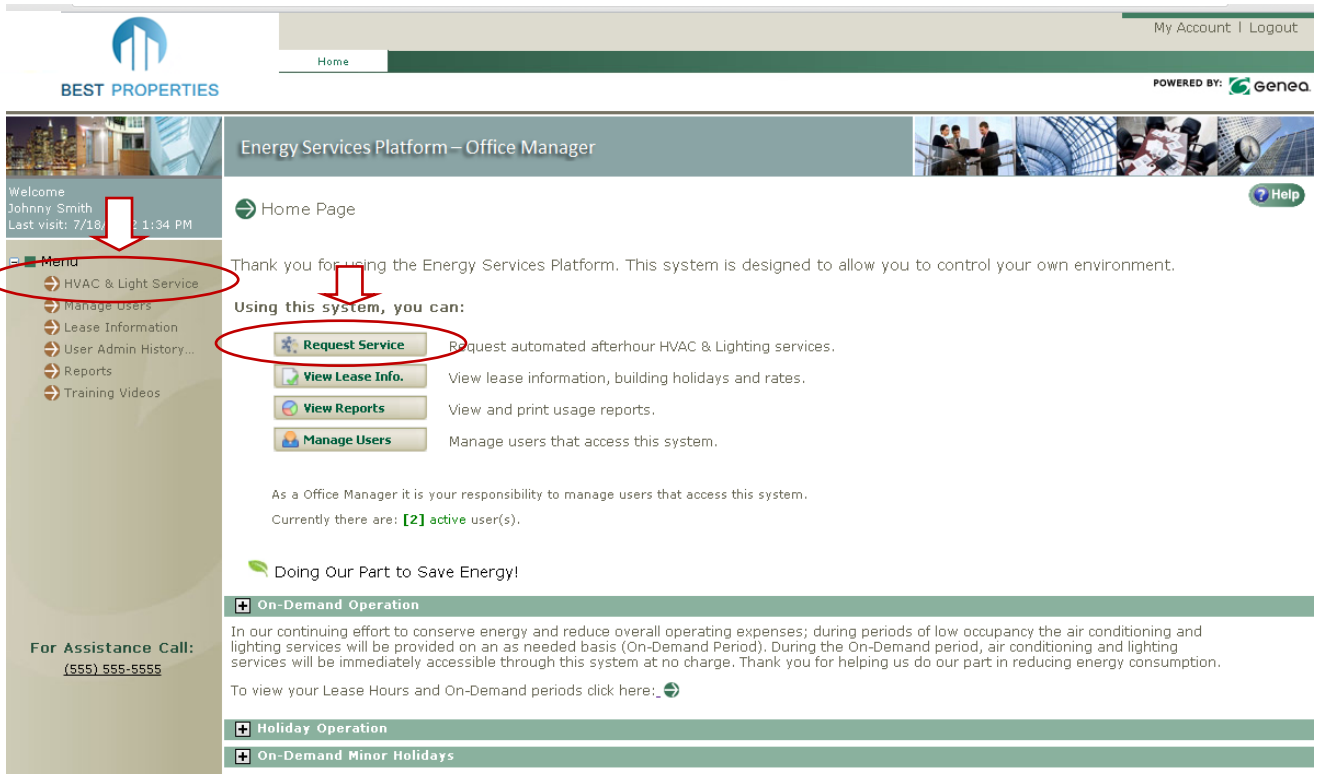
If you have any questions, please contact the Best Properties Management Office at (555) 555-5555.

This email has important information about your account. Please save this email for future use. Your account has been activated and is ready for use.

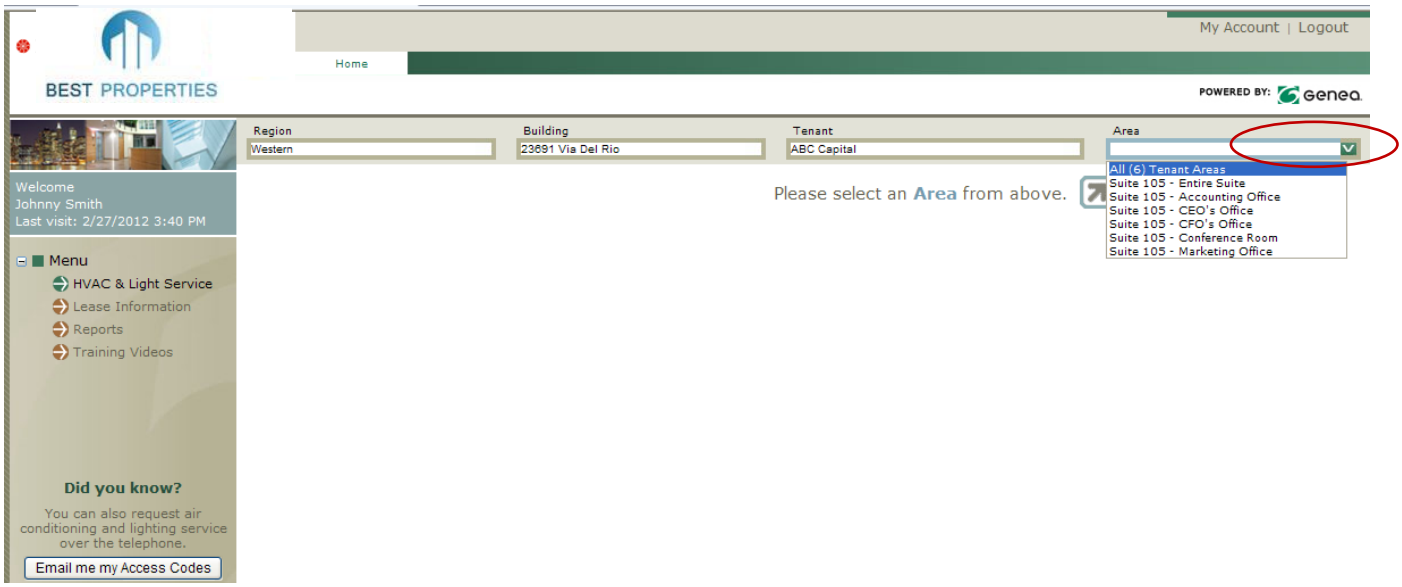
Section 2: Requesting for HVAC/Lighting Service

From your home page, there are two places that you can go to request for HVAC & Light Service.

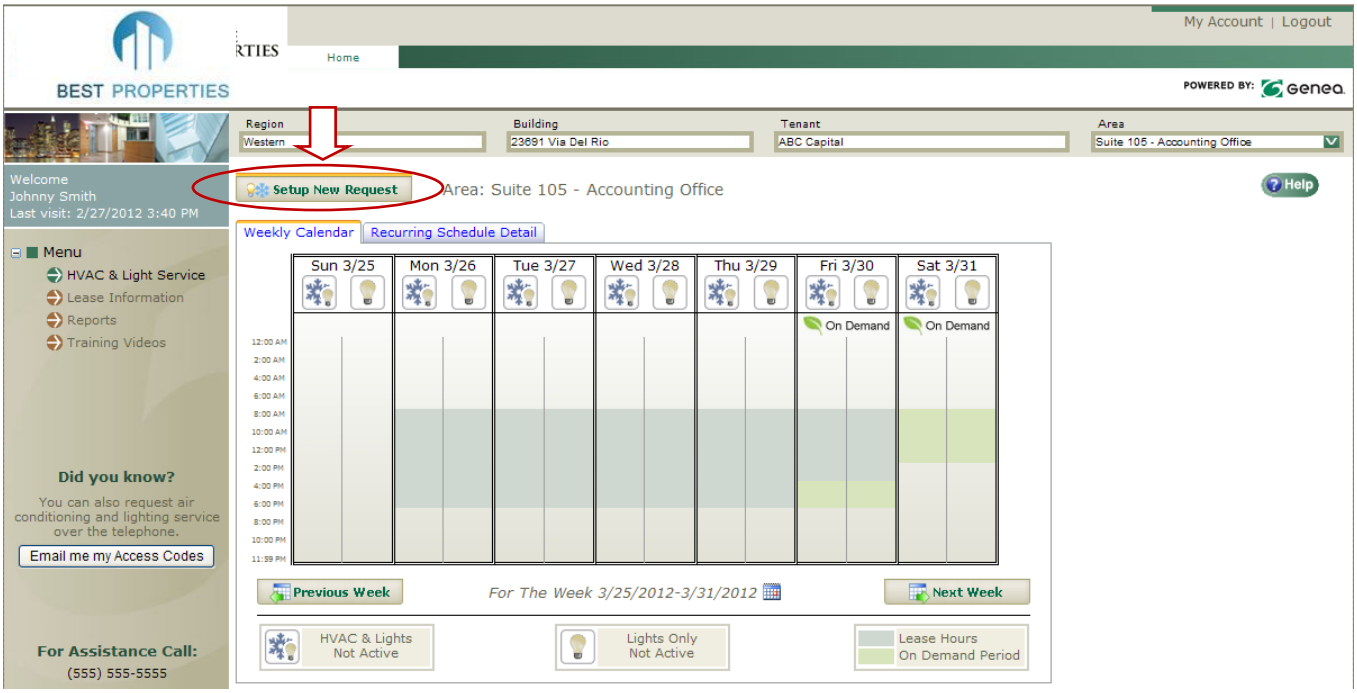
- From the left hand menu, click on HVAC & Light Service, or,
- From the center of the page, click on the **Request Service** icon



You will be directed to this next page. Select the Area that you would like by clicking on the pull down arrow under Area at the right hand top corner of the page. In the case that a tenant has only one area, you will be directed straight to the calendar request page (See next page).

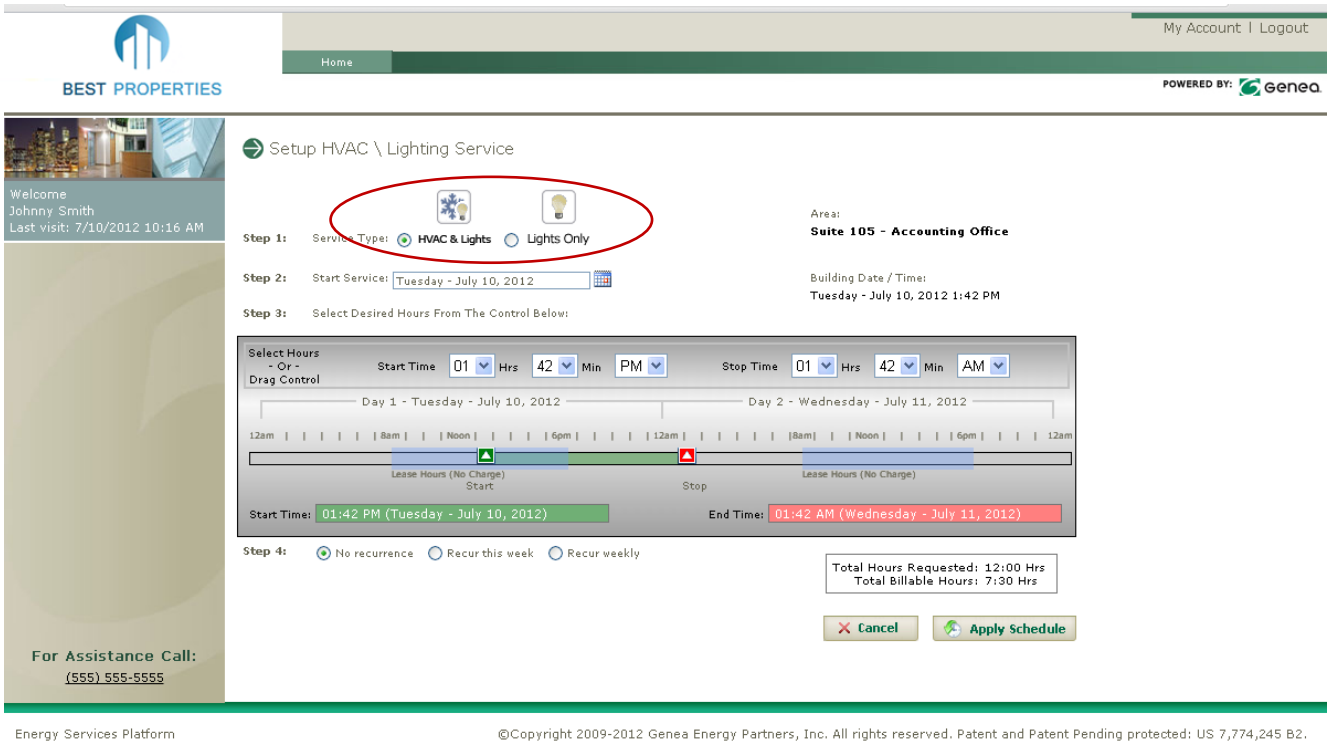


A calendar request page will appear. Click on the **Setup New Request** icon to proceed.

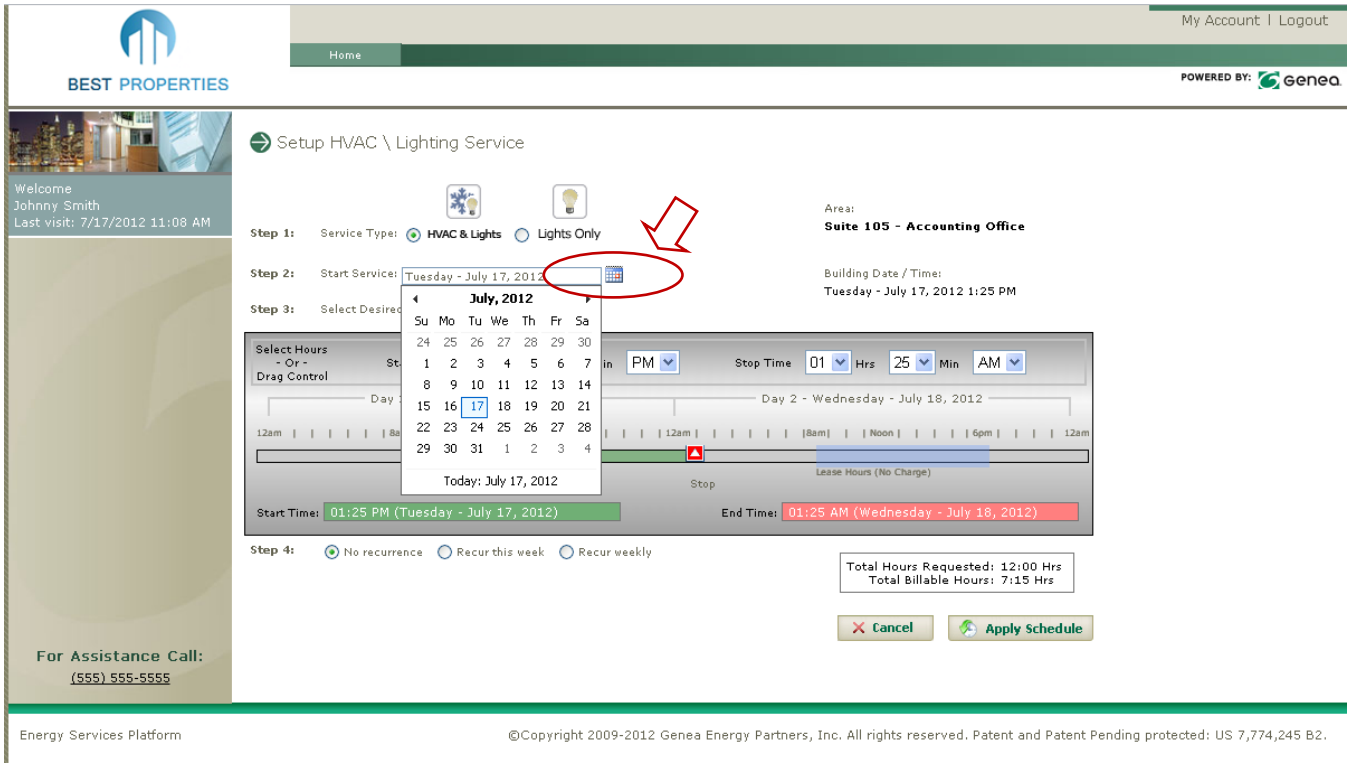


There are four simple steps in setting up a request.

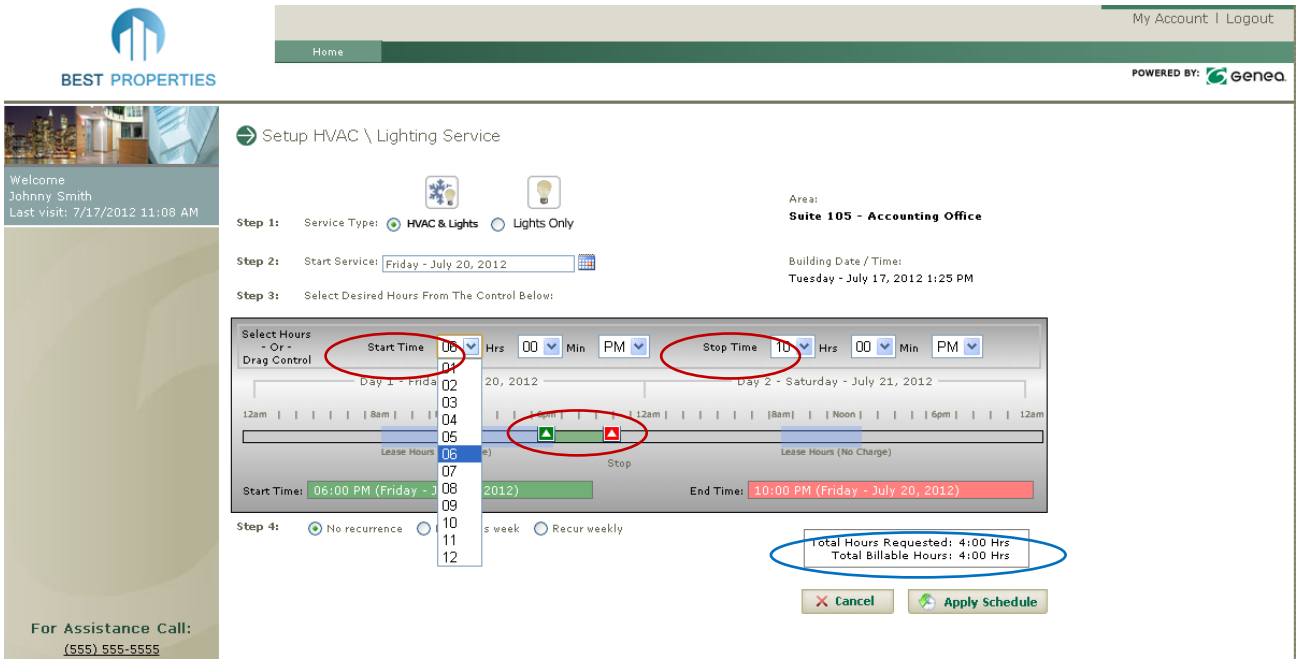
Step 1 is to select the service type. HVAC & Lights or Lights Only. (If your building does not have a Lights Only option, it will state “Not Available”).



Step 2 is to select the start service date. Use the small calendar icon and select the service date.

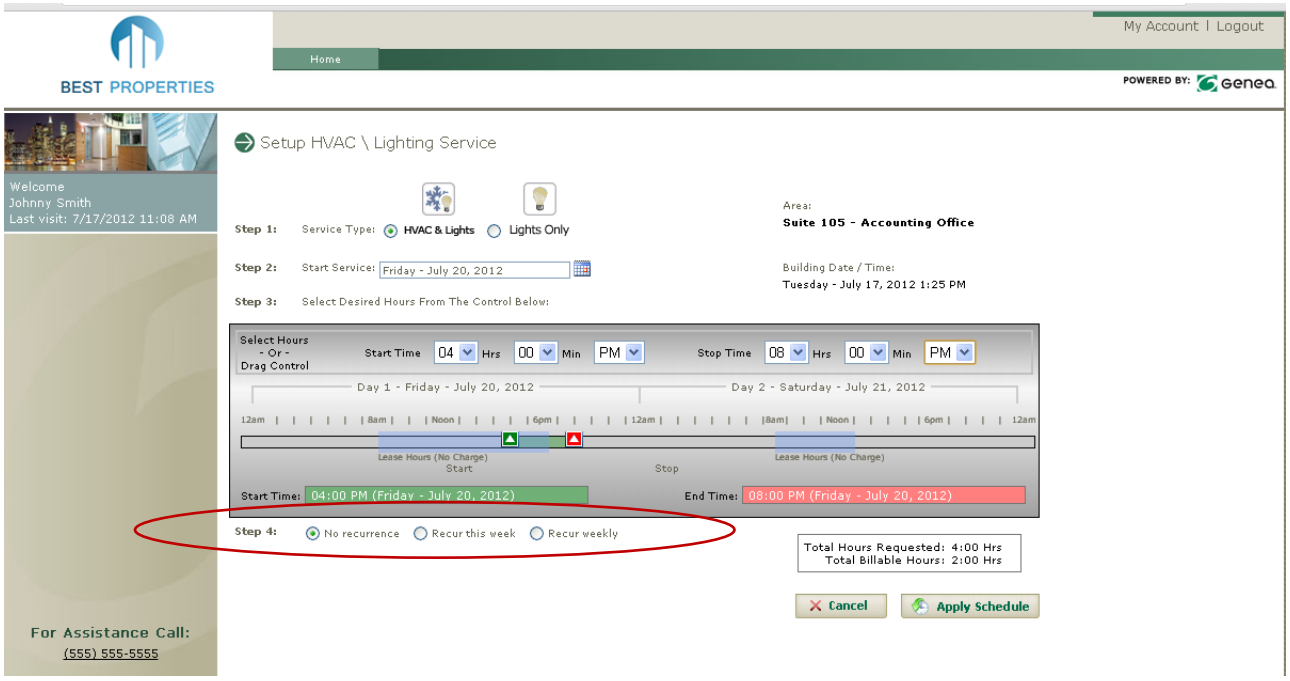


Step 3 Select the desired hours for the HVAC/Lighting service by choosing the start and stop time from the pull down menu. Alternatively, you can use the slider bar and drag the start and stop sliders to select desired hours. On the right bottom corner you will see the number of billable hours.



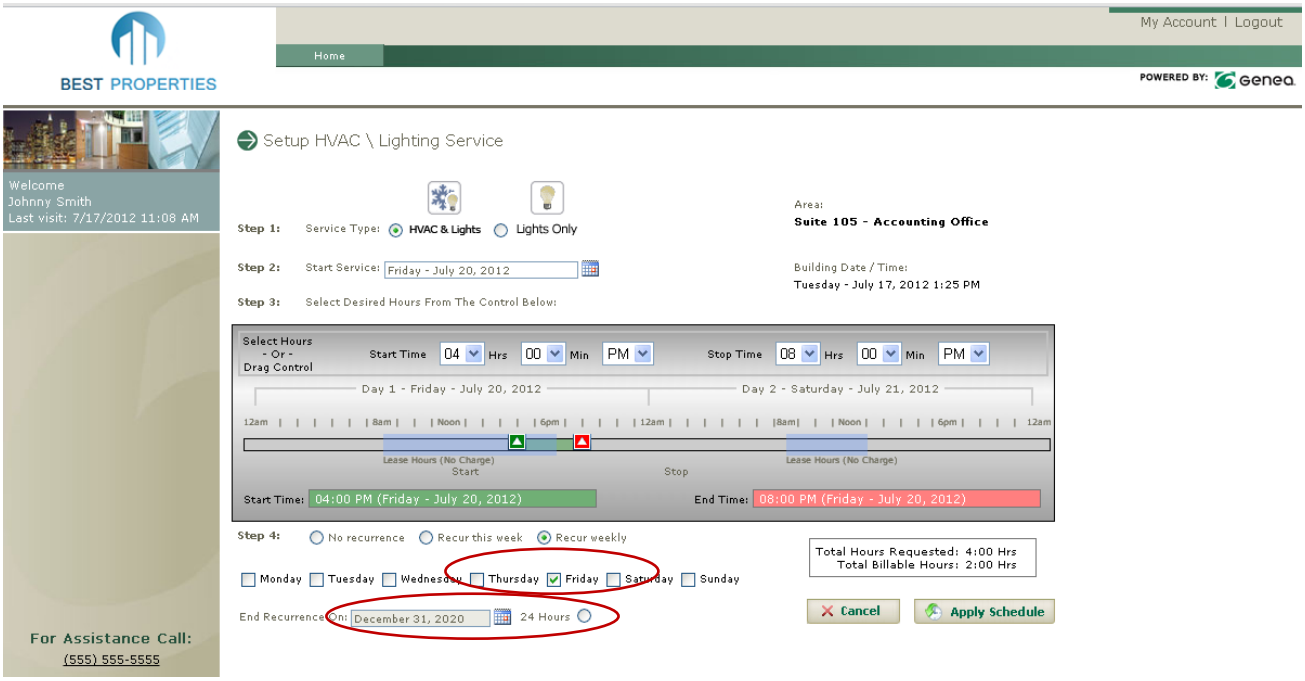
Step 4 Choose whether or not the request will recur. If this is a onetime request, choose No recurrence.

For recurring requests, choose whether the request will repeat again this week only or to recur weekly.

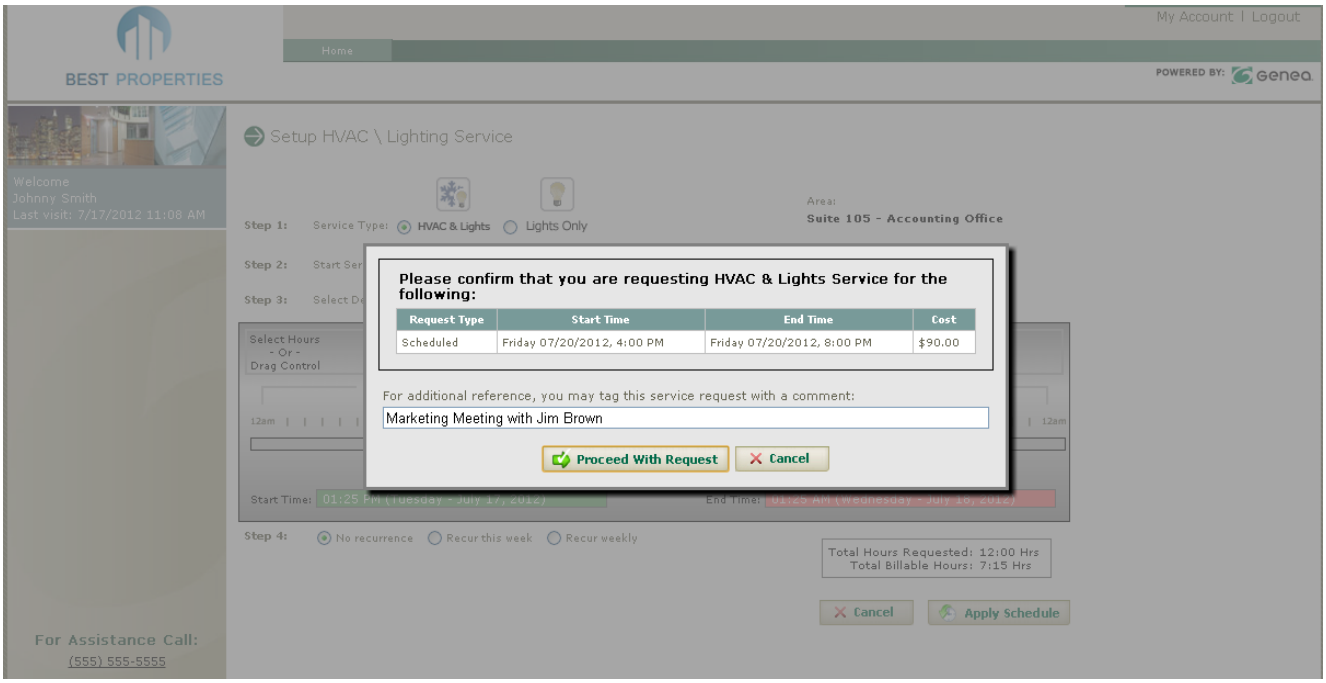


For the Recur this week option, check the box next to the additional day(s) you want to include in your request.

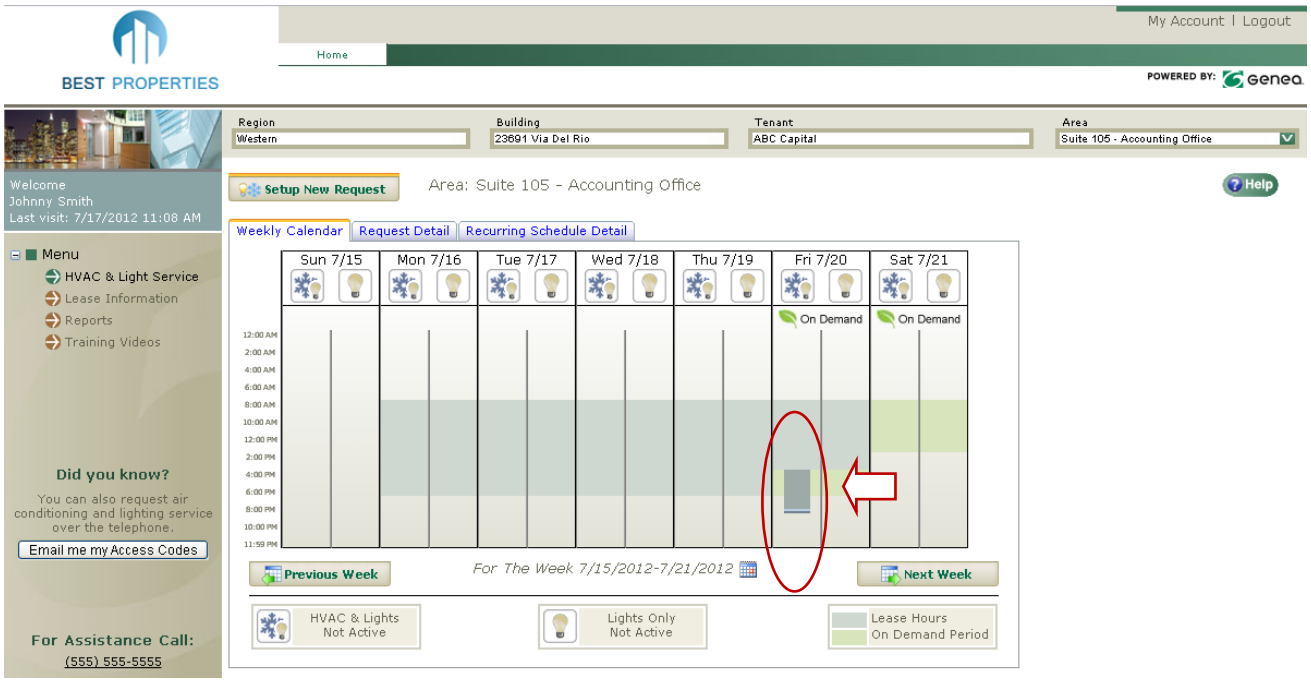
For the Recur weekly option, you will also need to specify the End Recurrence date of the request. The default is the lease expiration date. When you are done, click the Apply Schedule button.



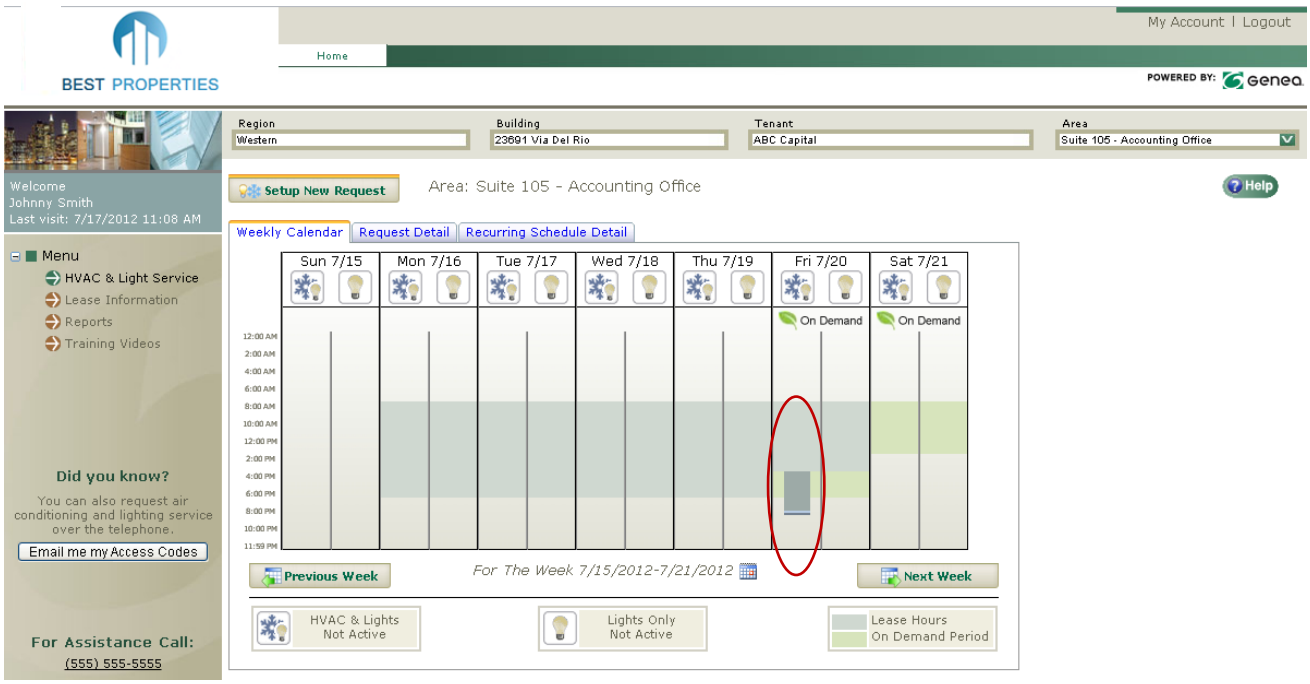
A popup window will appear asking you to confirm your request. At this time, you will have the opportunity to add additional information for the request. This can be a description of the meeting, a case number, a client name or other information to identify why the request was made. Once you are done, click on **Proceed with Request**.



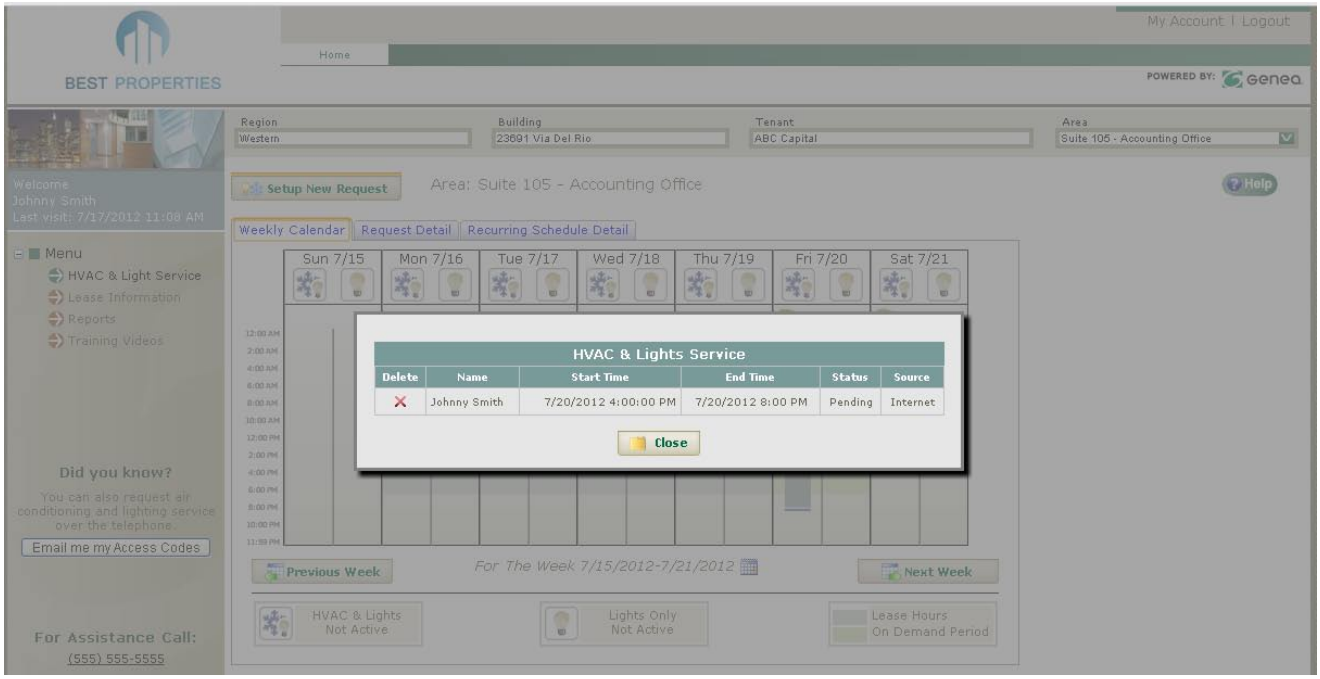
You will be returned back to the request calendar page. The page will show the request in dark grey color.



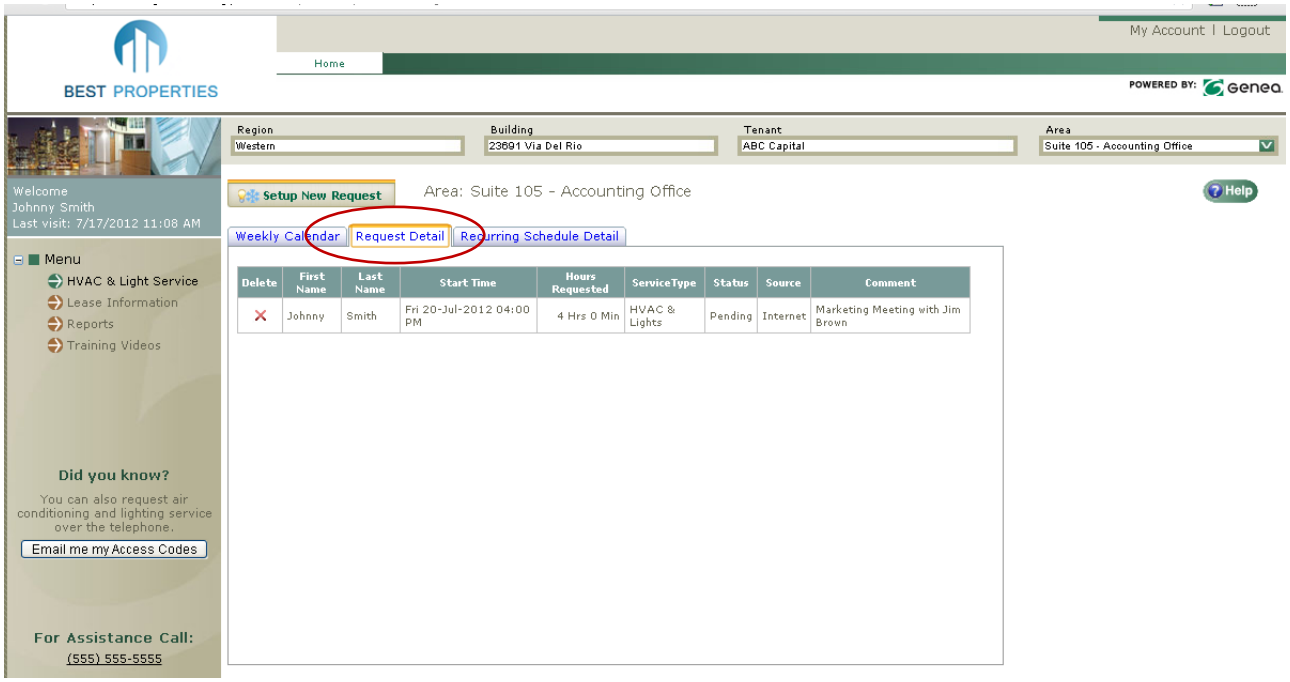
If you want to see the request detail again, you can go to the calendar page and double click on the grayed area.



A popup window will appear to show the detail of your request.

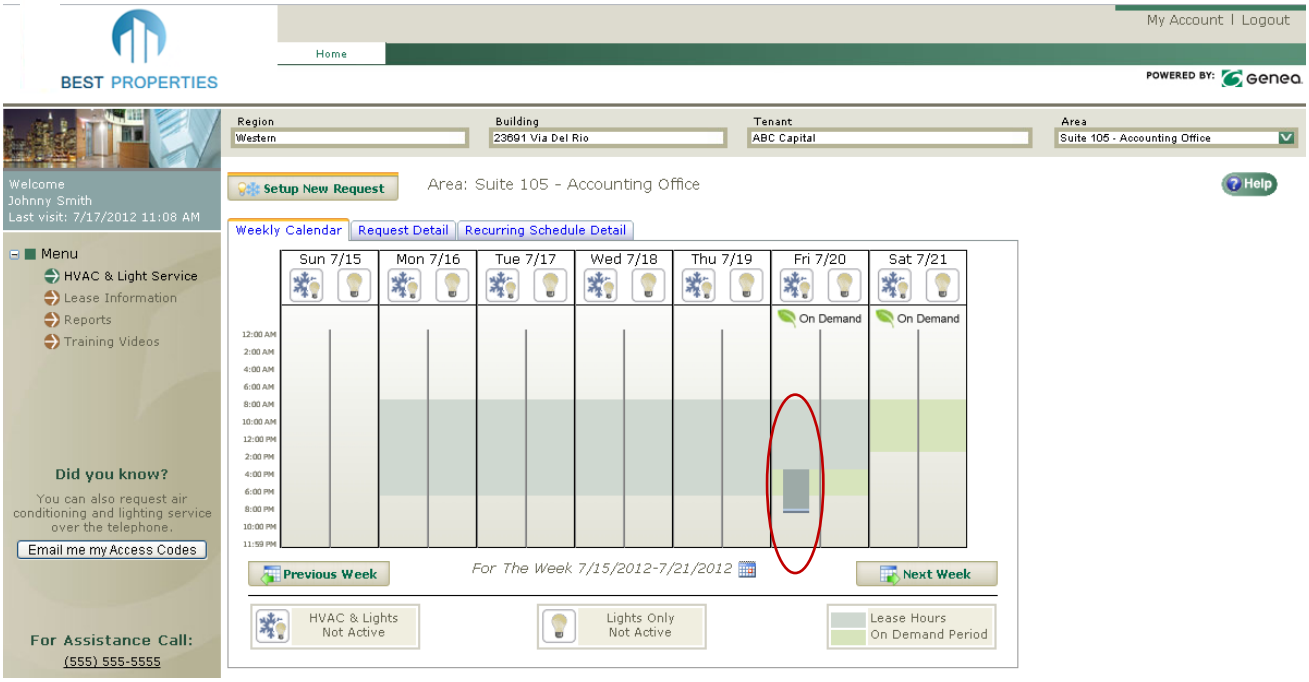


You can also see the request detail by clicking on Request Detail tab.

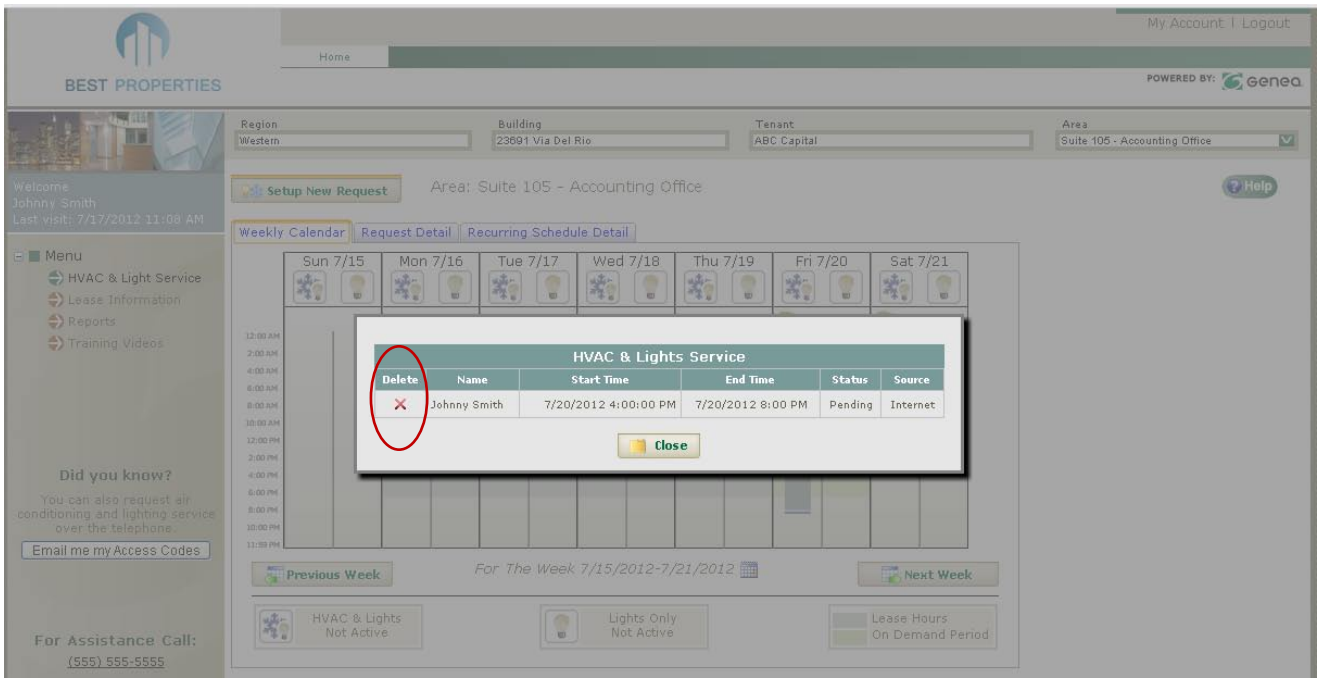


Section 3: Canceling HVAC/Lighting Service

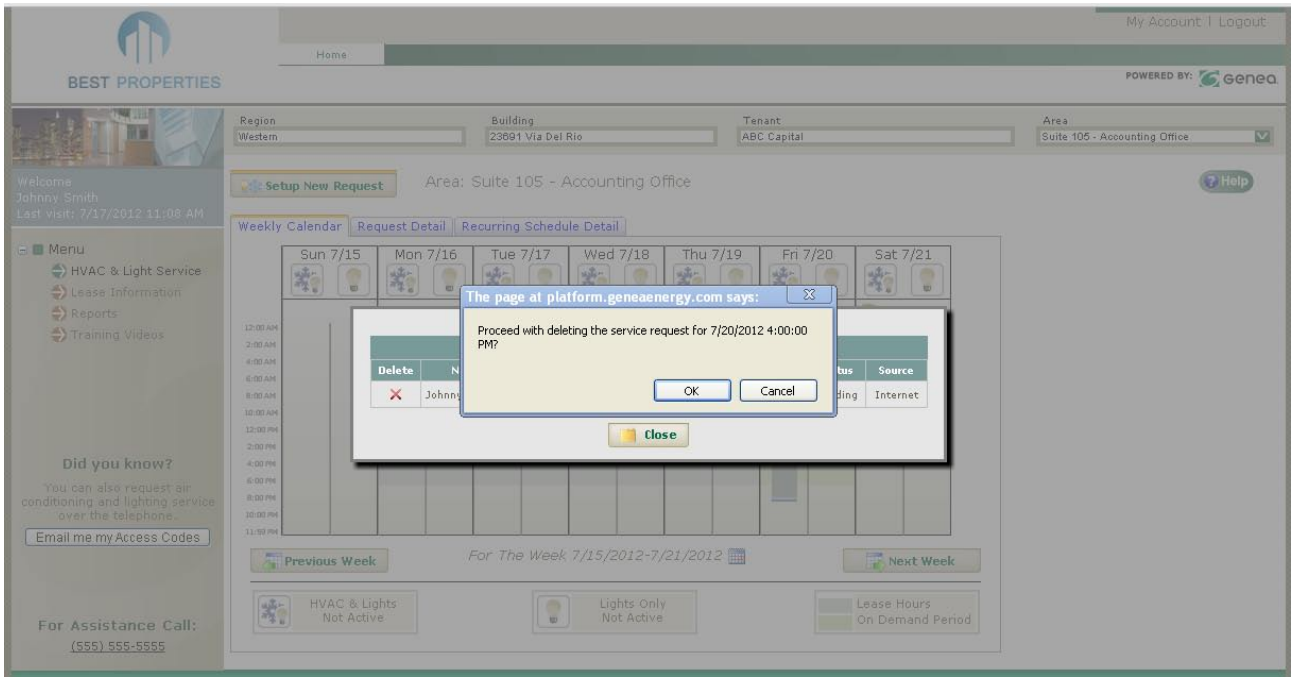
If you want to cancel an HVAC/Lighting request, go to the calendar page and click on the request (grey area).



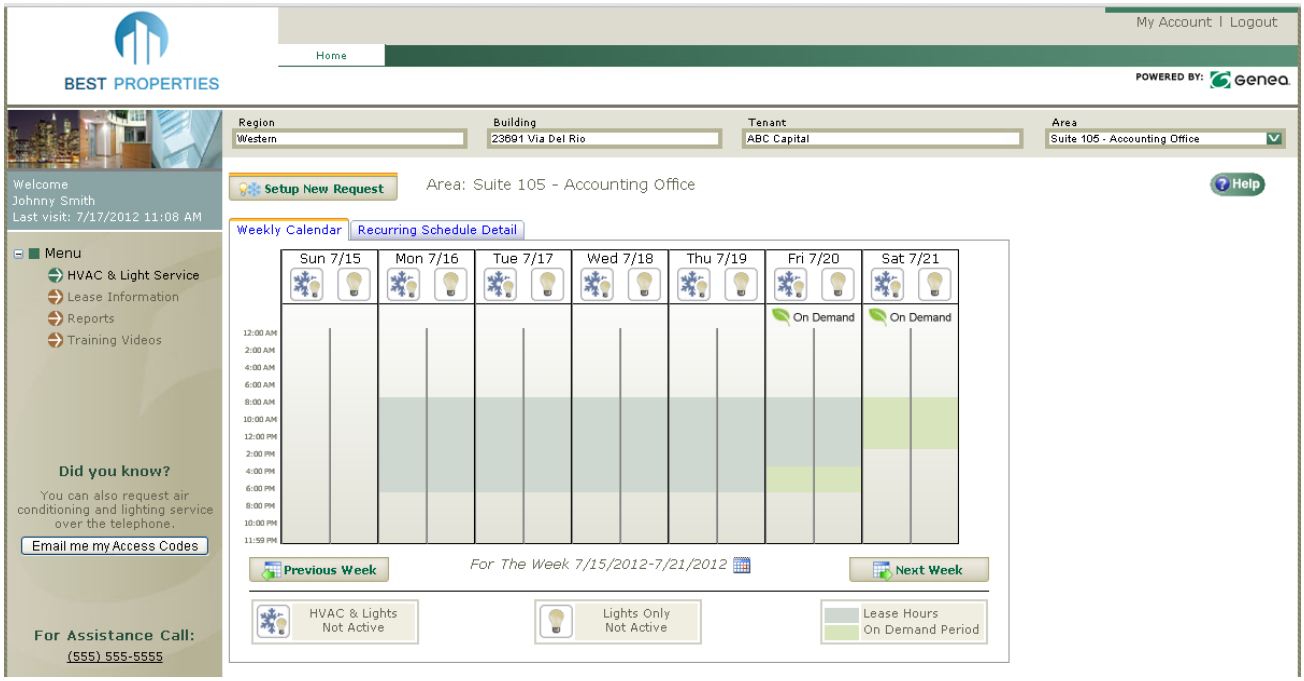
A popup window will appear to show the detail of the request. Click on the X icon under Delete to delete the request.



A popup window will ask you to confirm on deleting the request. Click OK to proceed.

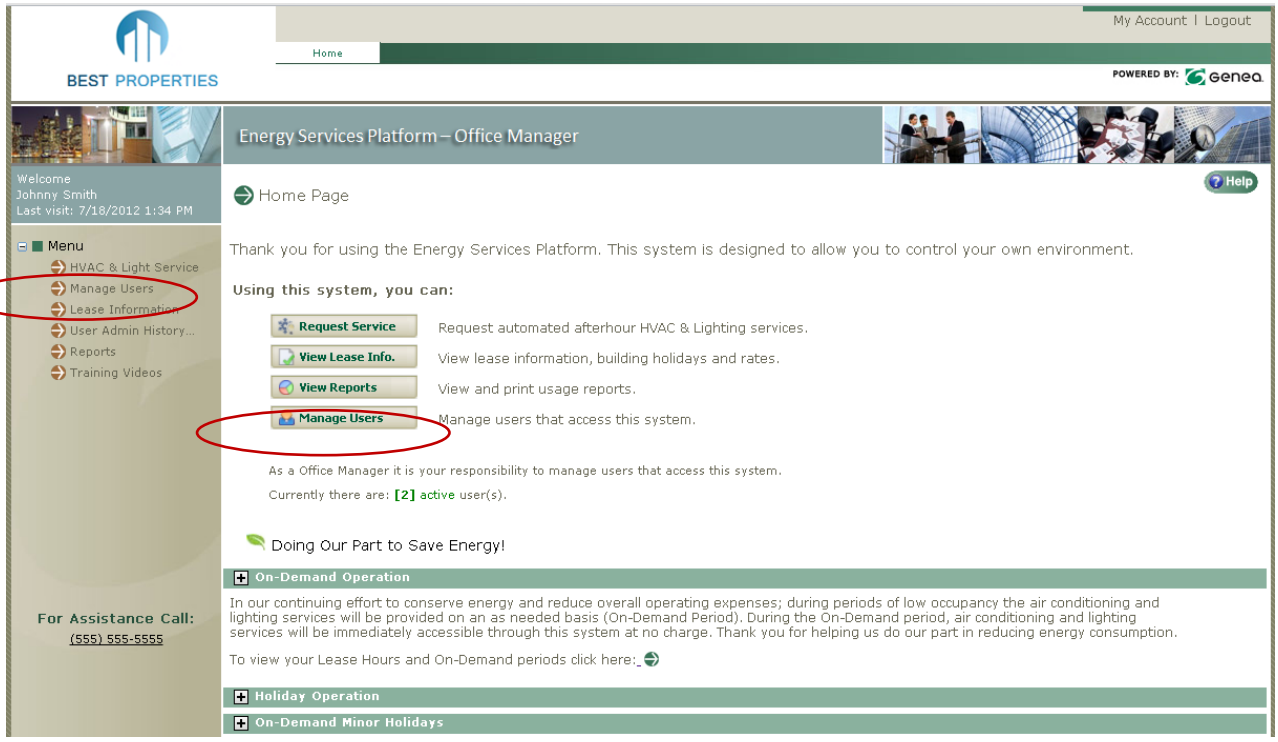


The request will be deleted. After a few seconds, your calendar page will refresh itself showing that the request is no longer in the system.

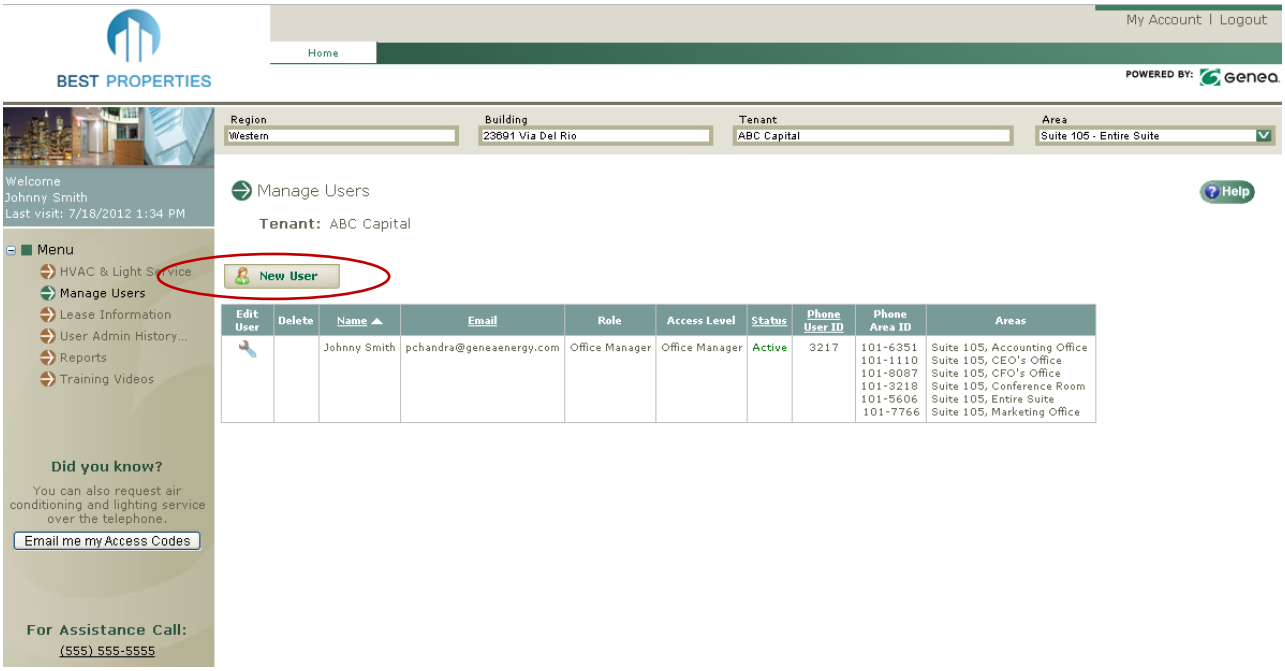


Section 4: Setting Up Tenant User

As a Tenant Office Manager, you have the ability to setup other users and give them the rights to request HVAC/Lights Service. From your home page, there are two places to do this.

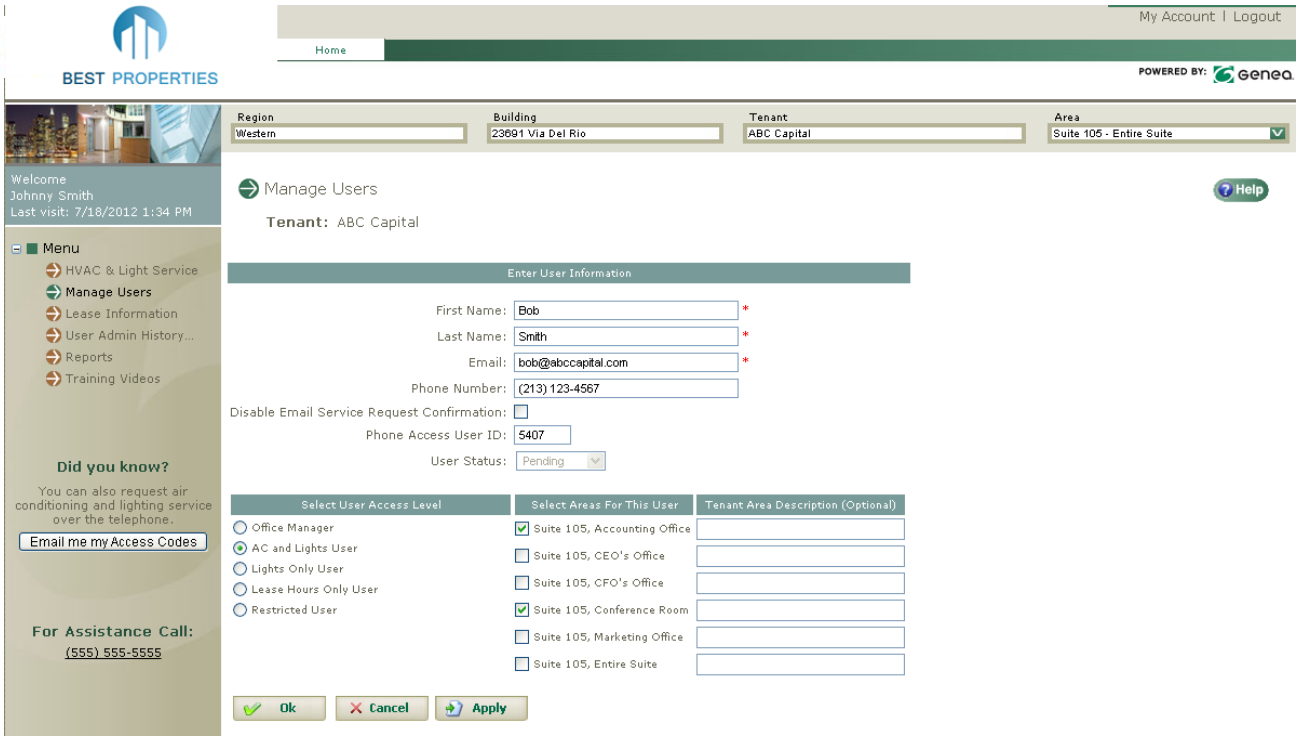


You will be directed to the Manage Users page. Listed on this page are all current users in the system. To setup a new user, click on the New User icon.



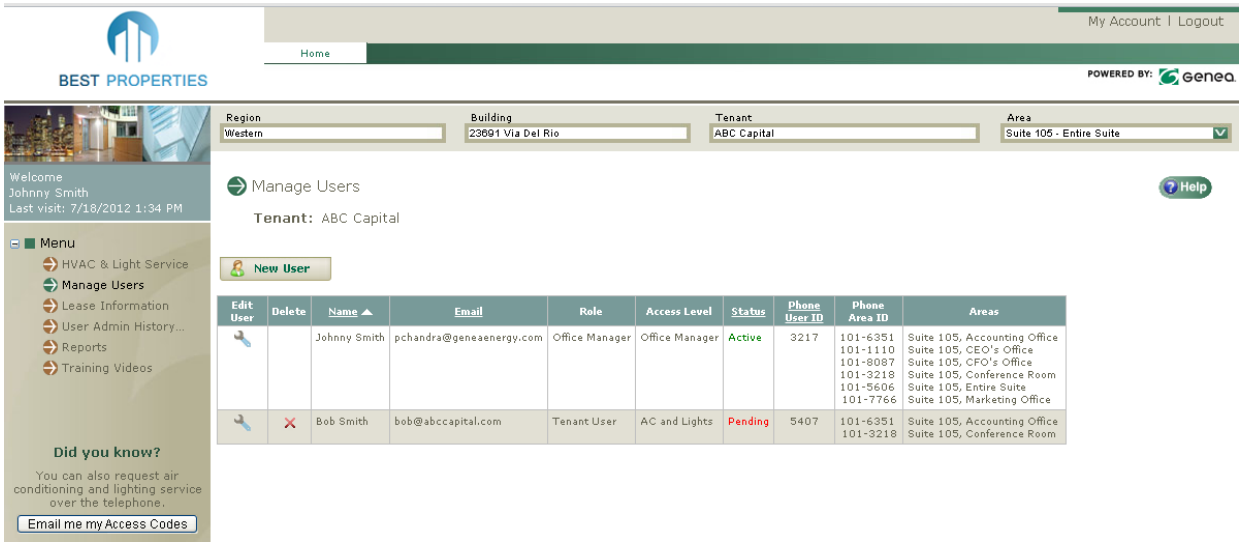
Fill out the information of the user: First Name, Last Name, Email, Phone Number and select the User Access Level that you want to assign to them. (Only First Name, Last Name, Email and User Access Level are required to add a new user). Here is a brief description of the different levels:

- **Office Manager –** Users that can make a request for AC & Lights. Also has permission to setup/edit users.
- **AC and Lights User –** Users that can make AC & Lights requests.
- **Lights Only User –** Users that can only make Lights requests.
- **Lease Hours Only –** Users with access to make requests only during stated Lease Hours
- **Restricted User –** Users restricted to a particular area within a suite



Click Okay once you populated the necessary data fields. The new user will automatically be sent a Welcome email from the system notifying them that they have been added and to activate their account.

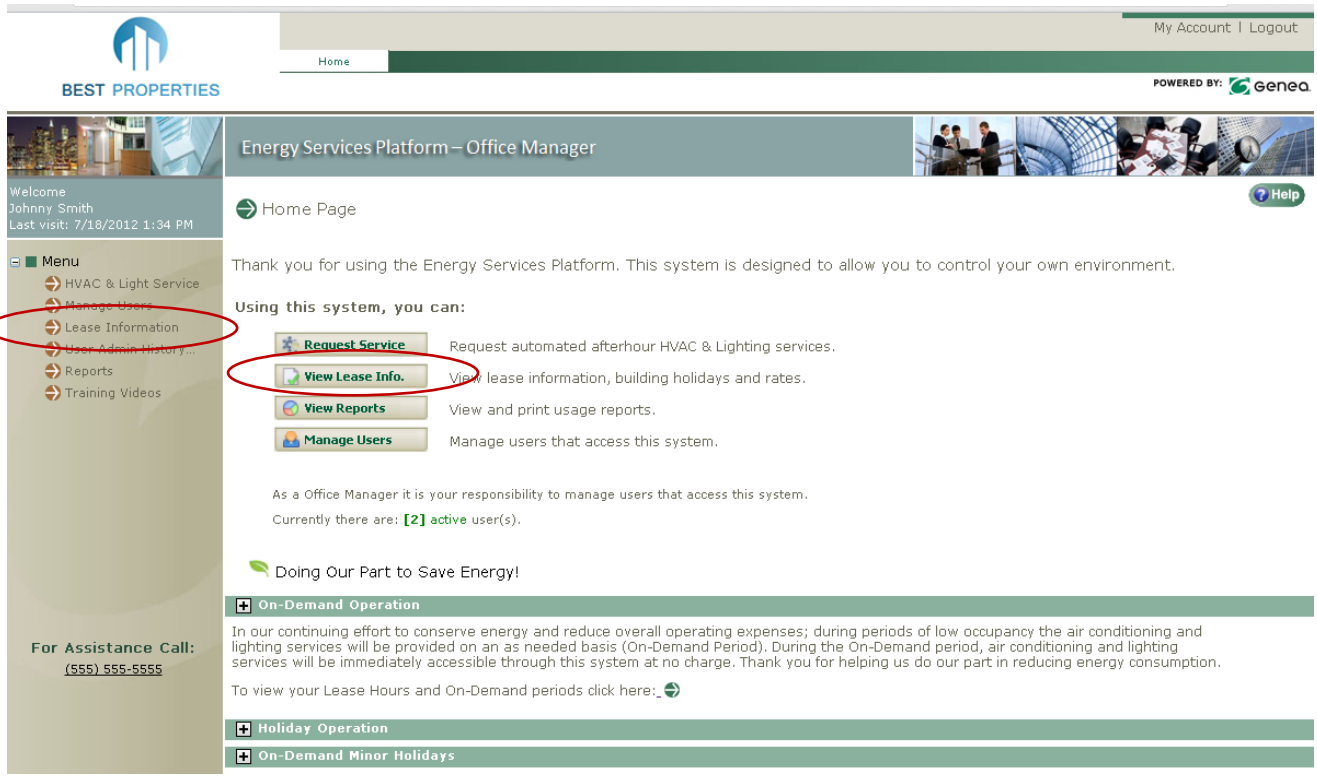
You will be directed back to the Manage Users page that shows all the users in the system.



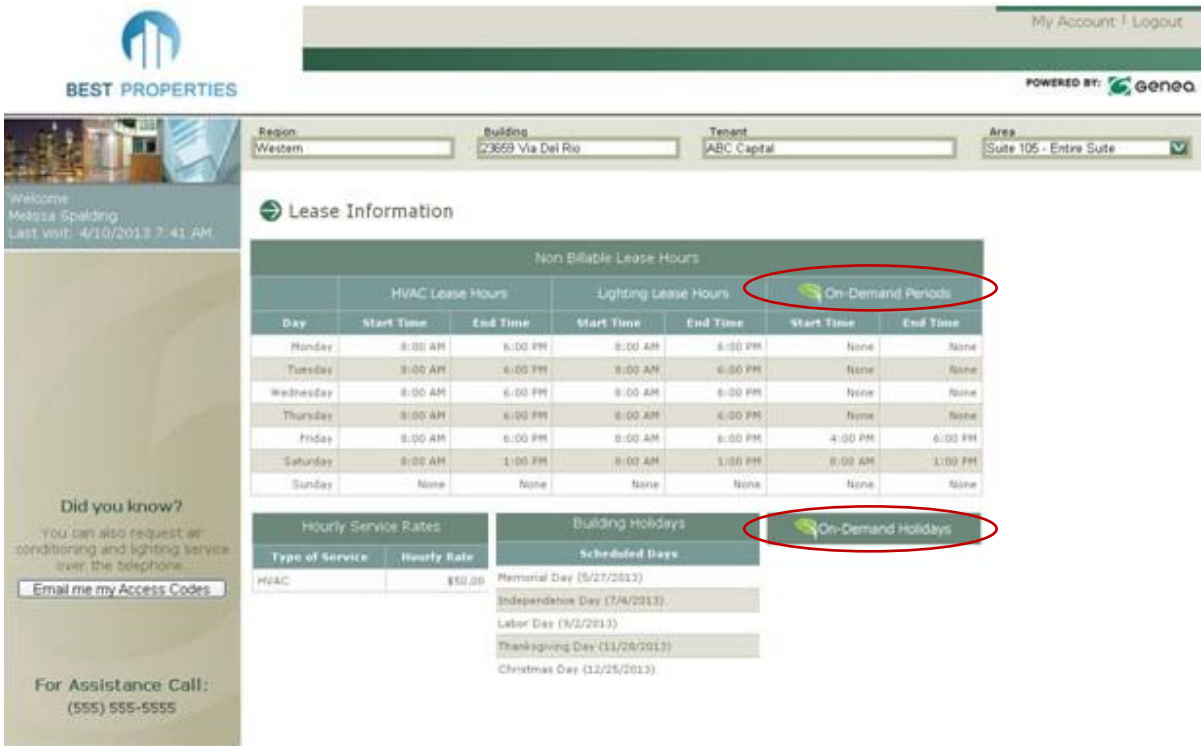
A new user will have the status “Pending” until they activate their account and create their own User Name and Password. Once they activate, their status will say “Active”.

Section 5: View Lease Information

As a Tenant Office Manager, you can view your lease information under the **Lease Information** icon.



Click on the Lease Information icon. You can view your weekly Lease Hours, Hourly Service Rate, Building Holidays for the calendar year, and On-Demand Periods and Holidays.



An **On-Demand Period** is a period of low occupancy where the air conditioning and lighting services will be provided by request only. During these periods, there is no charge for any requested air conditioning and/or lighting services during lease hours.

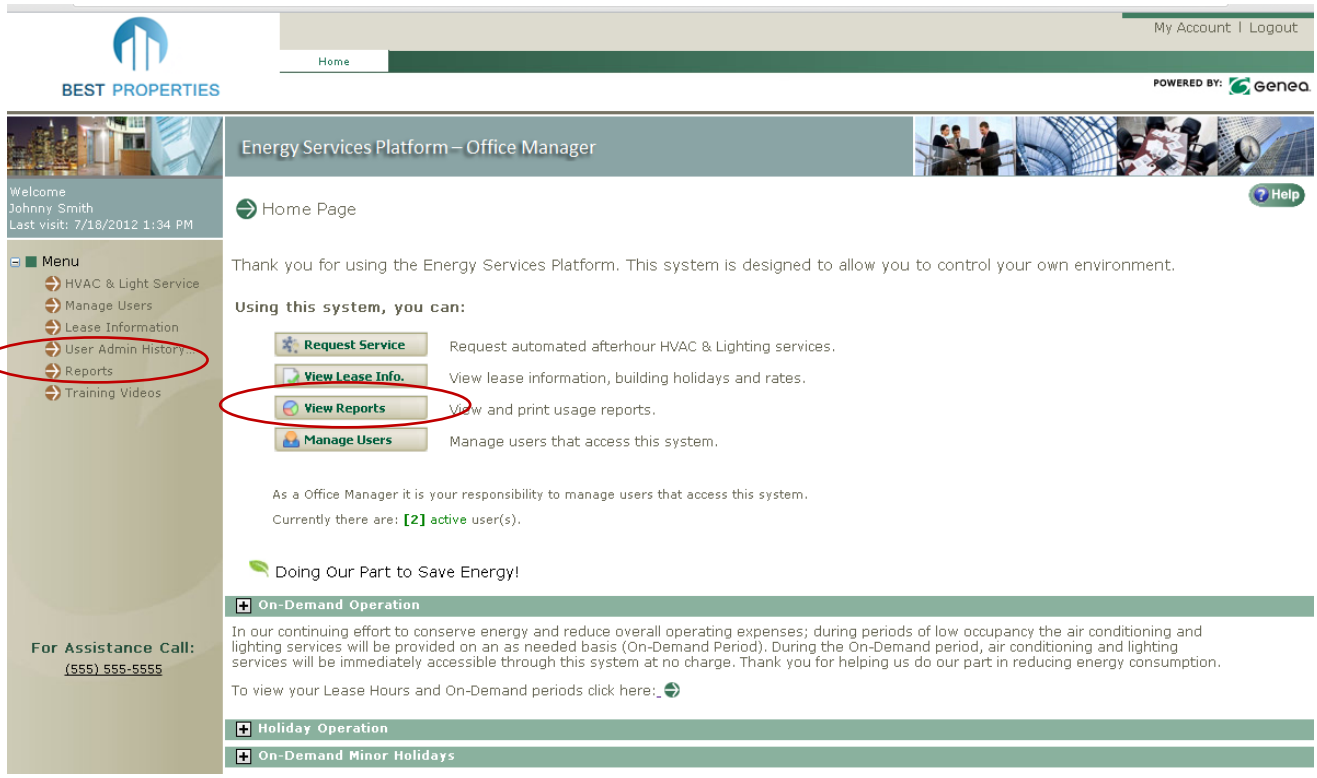
If your building has any On-Demand Periods, they will be listed under the On-Demand Periods column.

An **On-Demand Holiday** is a day that typically precedes or follows a building holiday. Air conditioning and lighting services will be provided by request only. For these days, there will be no charge for any requested air conditioning and/or lighting service received during normal lease hours.

If your building has any On-Demand Holidays they will be listed under the On-Demand Holidays column.

Section 6: Administration Reports

As a Tenant Office Manager, you have the ability to access a number of reports. Click on the **Reports** icon.



You will be directed to the Reports page where you can make your report selection. Below is a short description of each report:

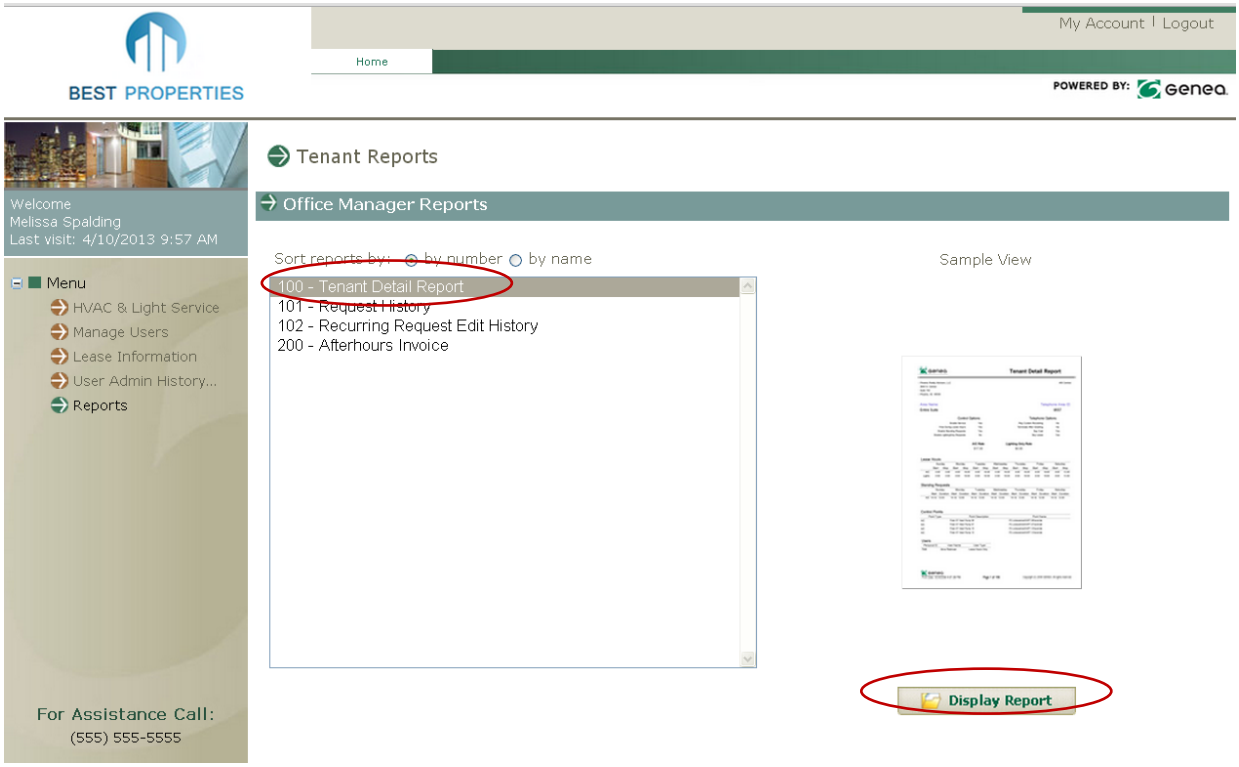
Tenant Detail Report a report that lets you view your Lease Information, Control Points, Recurring Requests, and Users within your area(s). This report is a useful tool for tracking, managing and updating your user database as it lists all current users in the system.

Request History a reports that gives you a snapshot of all activity; completed or cancelled requests within a specific time frame. You have the option to view request history ranging from one day to a number of days or months.

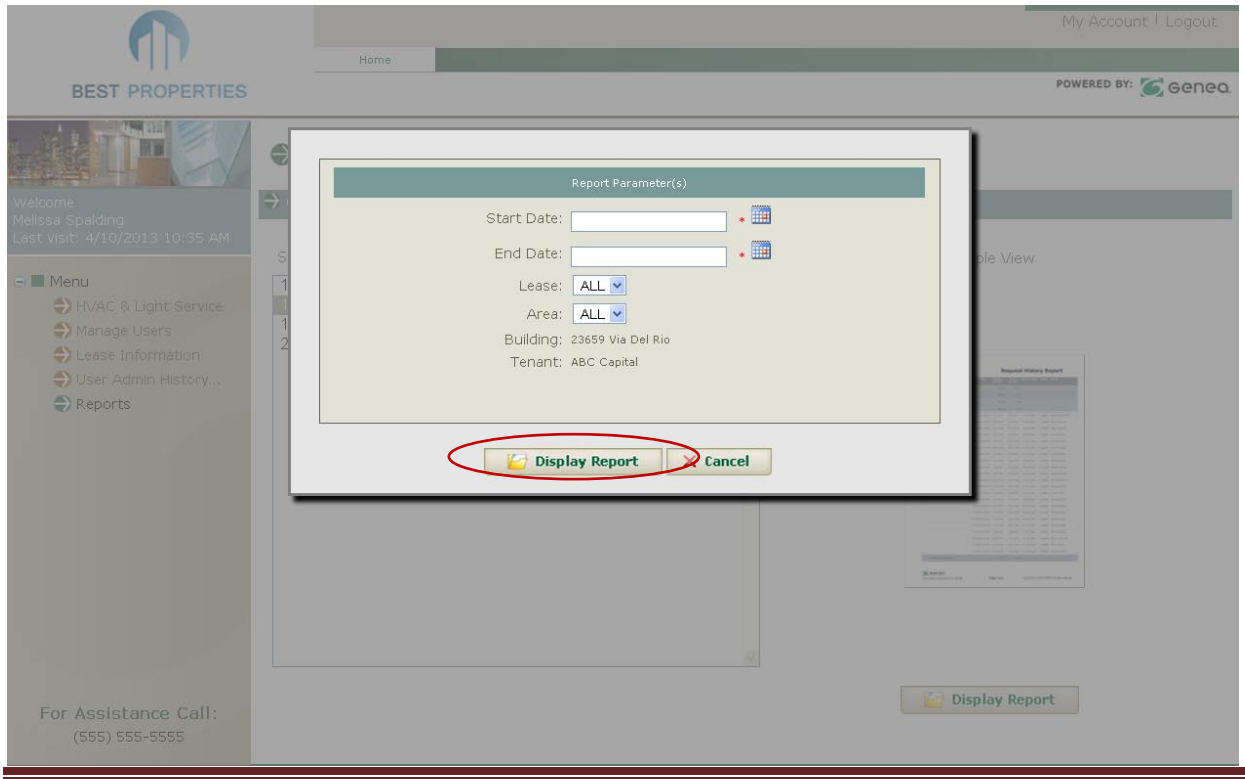
Recurring Request Edit History a report that is helpful if you have recurring requests and would like to see if there has been any edits and who made the edits to the original request.

Afterhours Invoice allows you to generate a month or a series of months of billing statements. Included in this report is the time of the request, the name of the requestor, number of hours requested, number of hours billed, and the total dollar amount.

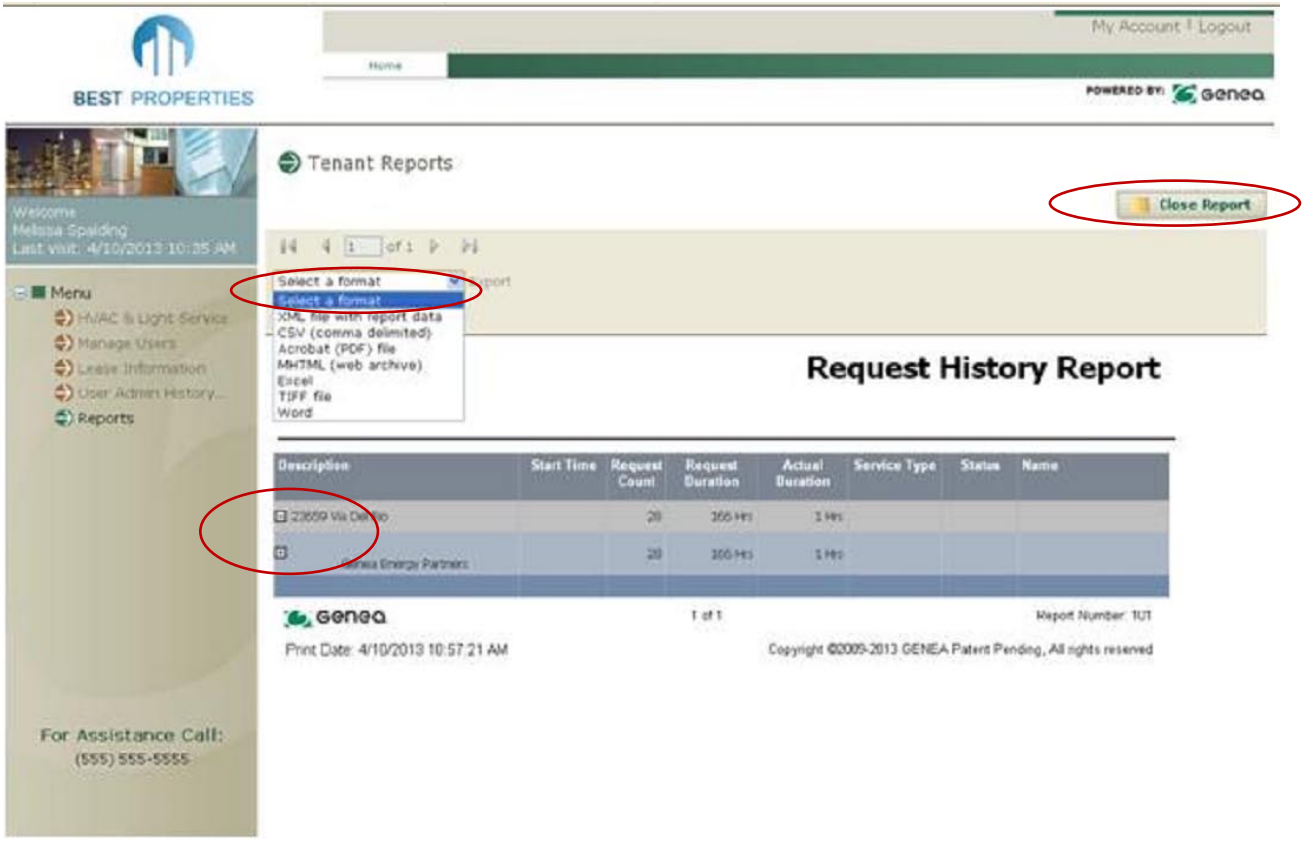
Click on the report you want to view and then click Display Report.



A popup window will appear asking you to select the parameters of your report. Once you select the Area(s) and the Start and End date, click Display Report.



After a few seconds, your report will be generated. Click on the expand icons under the Description tab to display your data.



You can export and save your report by selecting the preferred format type. When you are finished click on Close Report and you will be redirected to the Reports page.