

1800BSERVE



TRAINING MANUAL

June 2014

Brookfield



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## Foreword

**About 1800 BSERVE** The **1800BSERVE** is an internet-based application developed to enable nominated tenant representatives to lodge **Tenant Service Requests** (TSRs) online to ensure fast and efficient communication.

The 1800BSERVE enables the tenant representative to:

- Lodge requests or issues for service online, at any time\*;
- Raise issues that need to be addressed;
- Monitor the progress of TSRs from creation through to resolution; and
- View and report on past and present TSRs.

\* **Request** – action to be carried out at the request of the tenant that may be subject to re-charges.

**Issue** – an action to be carried out as agreed building maintenance



## Before you Start

### Before you start

For best results, we recommend that you use **Microsoft Internet Explorer version 9 (IE9) and the latest version of Adobe Flash Player**. This software can be downloaded from Microsoft's web site free of charge.

The **1800SERVE** site is best viewed with the screen resolution set at **1024 x 768 pixels resolution or better**.



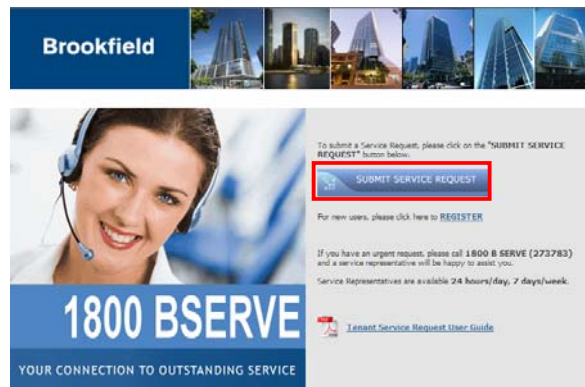
## Logging In, Updating Password, Changing Details, Maintaining User Details

### Logging In

Open an Internet Browser and navigate to the login page by accessing the following address:


**www.1800bserve.com**

Click 'Submit Service Request' to access the login page



Enter the username and password as provided via email, and click the **Log In** button.

**1800BSERVE**



LOG IN

Email Address:

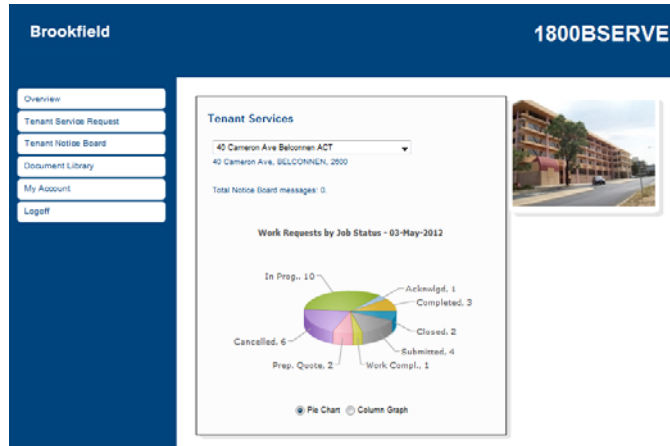
Password:

WARNING! Access to this system is prohibited unless authorised. Under no circumstance are you to access the system using another person's username and password. User access and activity is subject to audit.

[Forgot Password?](#)

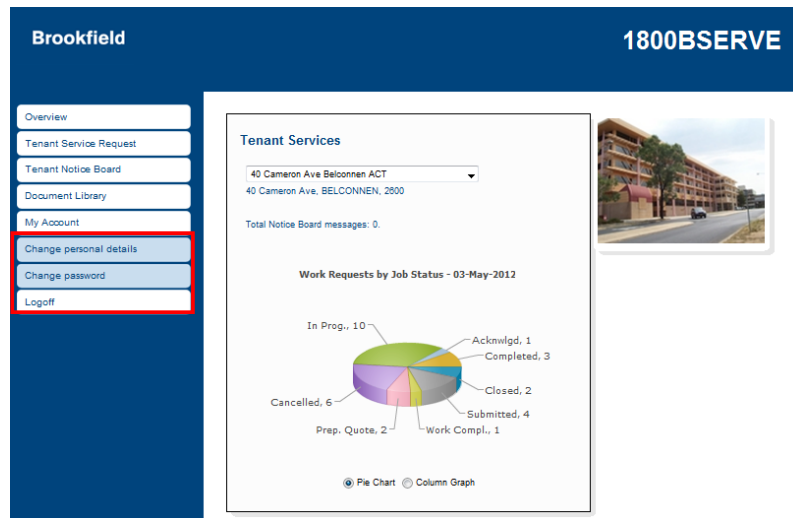


This will open the **1800 BSERVE** home page which displays quick statistical data in a graphical format



### Updating Password

You will be prompted to change your password on first login. To access the password options, click on the **My Account** drop down option and select **Change Password**.





You will be prompted to enter your original password and select a new password. Your password should contain no less than 7 characters and comprise a mix of alpha, numeric and non-alpha numeric characters. Repeat your new password and click the **“Save”** button

### Change Password

Current Password:

New Password:

Repeat New Password:

### Updating Personal Details

[Change personal details](#)

Select the **Change Personal Details** menu under **My Account** to ensure that contact details are correct.

### Edit Personal Information

Name: Rebecca Hall  
Email Address (Login): rebecca.hall@obre.oom.au

**Contact Details (optional)**  
Business Phone Number:   
Mobile(SMS):   
Fax:

**Secret Question**  
Select a Question:   
Answer:

### Maintaining User Details

When user details require updating, or new accounts need to be created, ensure that the Building Supervisor or Property Manager is aware of these changes. **1800 BSERVE** accounts must reflect the same records that appear in the property management systems.



## Creating a Tenant Service Request

### Creating a Tenant Service Request

To raise a new Tenant Service Request, use the down arrow to expand the menu. Select the **Tenant Service Request** option to open the **Create New Service Request Form**.

User information will automatically populate in the **Contact Details** fields. Check these details and ensure that they are correct before entering any of the following information:

Notes:

1. To “markup” a floor plan see: **“Markup” a Floor Plan** (below).
2. Update the **Contact Details Comments** field to allow contact details to flow through to the Purchase Order.

- **Select Floorplan:** (optional) If this field is available it means that floor plans have been uploaded for you and you are able to select and “markup” a floor plan to indicate where the fault lies / service is required;
- **Comments:** (top section) If there is any extra information about the request originator, or alternate contact details;
- Select your **Type** from the drop down list (**Request** or **Issue**)
- Enter the **Details** of your Request or Issue into the box provided;
- If **Request** has been selected, check one of the following options:

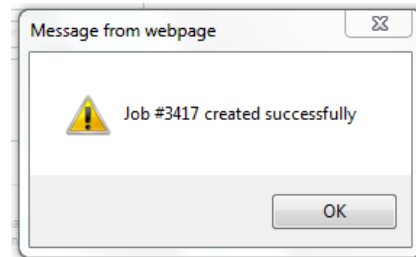
I accept any tenant charges that may apply as per Schedule of Rates  
 I require a Quote before accepting any charges

- Select your **Category** from the drop down list;





- Enter the **Comments** (bottom section) of your Request or Issue into the box provided (please advise the level and/or area where the issue is, as well as a detailed description of the actual issue);
- Click on the **Submit** button



**“Markup” a Floor Plan – submitting a TSR** Tenants are able to mark up the floor plan with an indication of where the fault lies / service is required.

- Select a **Floorplan** then click the **Mark Location** hyperlink.
- By clicking the “Mark Location” link on the TSR, you can “mark up” the location you require by selecting the appropriate Marking Tool and highlighting the area by holding down the left hand mouse button and dragging the mouse.
- To complete the “marking up” process, click the **Save** button.
- Complete the TSR in the normal fashion and click the **Submit** button.

**Create new request**

**1. Contact details**

Building: M2MACQ One Shelley Street

Tenant: Sample Fashion (Level R2)

Select Floorplan: 385.pdf\_Common Area [MarkLocation](#)

Requested by: Stuart Mackay

Phone: 07 3333 4444

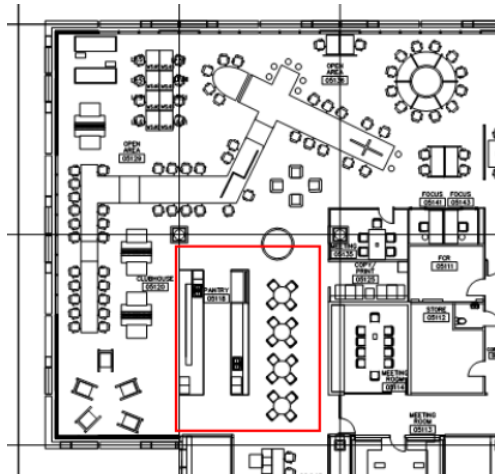
Email: stuart.mackay@cbre.com.au

Comments:



Notes:

1. By selecting the appropriate Marking Tool you can highlight the area by holding down the left hand mouse button and dragging the mouse



This is displayed when you click *Mark Location*

**View Open Requests**

The View Open Requests screen will be populated and will show the status of the new TSR as **Submitted**.

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**1800BSERVE**

Overview

Tenant Service Request

Create New Request

Quotes awaiting approval

**View Open Requests**

View Closed Requests

TSR Report

Feedback

Tenant Notice Board

Document Library

My Account

Logout

**Open Job Requests**

Job Code	Job Type	Tenant	Category	Log_date	Status
3430	Issue	Commonwealth of Australia	Air Conditioning	2012-05-01	Submitted
3428	Issue	Columbian Cafe	Air Conditioning	2012-04-30	Submitted
3419	Issue	Commonwealth of Australia	Air Conditioning	2012-04-28	Submitted
3417	Issue	Commonwealth of Australia	Air Conditioning	2012-04-13	Acknowledged
3412	Request	BFF forever	Cleaning	2012-04-12	Quote Issued
3410	Issue	BFF forever	Lifts & Escalators	2012-04-12	In Progress
3400	Request	BFF forever	Rubbish Removal	2012-04-10	In Progress
3399	Issue	BFF forever	Air Conditioning	2012-04-10	In Progress
3398	Request	Commonwealth of Australia	Consultants	2012-04-05	Submitted
3397	Issue	Columbian Cafe	Cleaning	2012-04-05	In Progress
3396	Issue	Commonwealth of Australia	Fire Protection	2012-04-05	In Progress
3394	Request	Columbian Cafe	Gardening/Landscaping	2012-04-05	In Progress
3393	Issue	Columbian Cafe	Air Conditioning	2012-04-05	Completed

When your request has been submitted, the system will automatically assign the request to the Building Supervisor. When the Building Supervisor has acknowledged the request, you will receive an email notification. The status of the job is updated to **Acknowledged**.

Sent: Fri 13/04/2012 3:48 PM  
 To: Hall, Rebecca @ Brisbane

Rebecca Hall,

The TSP job #3417 has been Acknowledged by the building manager.

To view information about the job please click on <http://testpulseResponse.cbre.com.au/Login.aspx?accesstype=email&jobid=3417>



## Requesting a Quote

If you requested that a quote be received first, the status of the TSR will show as Preparing Quote.

Job Code	Job Type	Tenant	Category	Log date	Status
<a href="#">3412</a>	Request	BFF forever	Cleaning	2012-04-12	Preparing Quote
<a href="#">3410</a>	Issue	BFF forever	Lifts & Escalators	2012-04-12	In Progress
<a href="#">3400</a>	Request	BFF forever	Rubbish Removal	2012-04-10	In Progress
<a href="#">3399</a>	Issue	BFF forever	Air Conditioning	2012-04-10	In Progress
<a href="#">3397</a>	Issue	Columbian Cafe	Cleaning	2012-04-05	In Progress
<a href="#">3394</a>	Request	Columbian Cafe	Gardening/Landscaping	2012-04-05	In Progress
<a href="#">3393</a>	Issue	Columbian Cafe	Air Conditioning	2012-04-05	Completed
<a href="#">3388</a>	Request	Columbian Cafe	Plumbing	2012-03-28	Completed
<a href="#">3369</a>	Request	Columbian Cafe	Pest Control	2012-03-13	In Progress

When the Building Supervisor has reviewed the request, it will be actioned.

You will be required to **accept** or **decline** the quote once the quote has been issue to you for review.

All status changes will trigger a system generated email to alert the Tenant Representative of the progress of the request.



## Viewing Requests

**Viewing Requests** All requests that have not yet been closed can be viewed by navigating to the **View Open Requests** menu. This will list all active requests in order of **Job Code**.

### Open Job Requests

Job Code	Job Type	Tenant	Category	Log date	Status
<a href="#">3430</a>	Issue	Commonwealth of Australia	Air Conditioning	2012-05-01	Submitted
<a href="#">3428</a>	Issue	Columbian Cafe	Air Conditioning	2012-04-30	Submitted
<a href="#">3419</a>	Issue	Commonwealth of Australia	Air Conditioning	2012-04-28	Submitted
<a href="#">3417</a>	Issue	Commonwealth of Australia	Air Conditioning	2012-04-13	Acknowledged
<a href="#">3412</a>	Request	BFF forever	Cleaning	2012-04-12	Quote Issued
<a href="#">3410</a>	Issue	BFF forever	Lifts & Escalators	2012-04-12	In Progress

Further detail can be seen by clicking on the **Job Code** link to open up the request information page. This will show all of the original request details, the status and a log of the workflow on the issue/request.

### Job Details

Job Number:	3412	<a href="#">Print</a>
Building:	Sample Brookfield Building	
Tenant:	BFF forever	
Requested By:	Pei Lin Ng	
Phone:		
Email:	peilin.ng@obrs.com.au	
More Info:	testing on Brookfield - request with quote	
Type:	Request	
Category:	Cleaning	
Job Detail:	testing on Brookfield - request with quote	

### Status

Job:	Quote Issued
Charges:	Quote Issued: \$99 (Ex. GST)

### Action

Options:	<a href="#">Approve Quote</a>	<a href="#">Decline Quote</a>			
Quote(\$):	Quote: \$99 (Ex. GST)				
Quote attachment:	<table border="1"> <thead> <tr> <th>Filename</th> <th>Uploaded</th> </tr> </thead> <tbody> <tr> <td><a href="#">quote.pdf</a></td> <td>13/04/2012 3:25:50 PM</td> </tr> </tbody> </table>	Filename	Uploaded	<a href="#">quote.pdf</a>	13/04/2012 3:25:50 PM
Filename	Uploaded				
<a href="#">quote.pdf</a>	13/04/2012 3:25:50 PM				
Comment:	<input type="text"/>				

### Job History

Action	By	Date	Workflow Comment
Submitted	Pei Lin Ng	12 Apr 12 @ 13:38	Quote Requested
Acknowledged	Pei Lin Ng	13 Apr 12 @ 15:15	
Preparing Quote	Pei Lin Ng	13 Apr 12 @ 15:15	
Quote Issued	Pei Lin Ng	13 Apr 12 @ 15:25	Quote: \$99 (Ex. GST)



Historical data can be viewed by selecting the **View Closed Requests** menu item and opening individual **Job Codes** to see the details.

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- Overview
- Tenant Service Request
- Create New Request
- Quotes awaiting approval
- View Open Requests
- View Closed Requests

### Closed Job Requests

Job Code	Job Type	Tenant	Category	Log date	Status
<a href="#">3403</a>	Request	Columbian Cafe	Pest Control	2012-04-11	Closed
<a href="#">3395</a>	Request	Columbian Cafe	Security	2012-04-05	Closed
<a href="#">3388</a>	Request	Columbian Cafe	Plumbing	2012-03-28	Closed
<a href="#">3387</a>	Issue	Columbian Cafe	Air Conditioning	2012-03-28	Closed

Jobs with quotes that have not yet been approved will be in the **Quotes Awaiting Approval** menu.

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- Overview
- Tenant Service Request
- Create New Request
- Quotes awaiting approval

### Quotes Awaiting Approval

Job Code	Job Type	Tenant	Category	Log date	Status
<a href="#">3412</a>	Request	BFF forever	Cleaning	2012-04-12	Quote Issued



## Closing a Tenant Service Request

### Closing a Tenant Service Request

When the request has been completed, and it has been confirmed as a satisfactory result, the request can be **Closed**. Navigate to the **Open Requests** menu and click on the request that has a status of **Completed**.

<a href="#">553</a>	Issue	Commonwealth of Australia	Air Conditioning	2011-09-28	Completed
<a href="#">96</a>	Issue	Commonwealth of Australia	Air Conditioning	2011-07-21	Completed

This will open the TSR Page with all of the history available for viewing. In the **Action** section of the form, enter in any relevant comments if applicable about the TSR and click on the **Close Job** button.

**Job Details**

Job Number: 553

---

Building: 40 Cameron Ave Belconnen ACT  
 Tenant: Commonwealth of Australia  
 Requested By: Pei Lin Ng  
 Phone:  
 Email: peilin.ng@cbre.com.au  
 More Info: test on new PROD release - please ignore

---

Type: Issue  
 Category: Air Conditioning  
 Fault: Other  
 Job Detail: test on new PROD release - please ignore

**Status**

Job: Completed  
 Charges: Not Applicable

**Action**

Options:

Comment:

The status is updated to **Closed**.

**Status**

Job: Closed  
 Charges: Not Applicable



## Tenant Service Request Reports

### Tenant Service Request Reports

The **1800 BSERVE** system has the ability to report on all Issues/Requests that have been logged. To run this report, expand the **Tenant Service Request** menu and select **TSR Report**.

### Tenant Service Request Report

Please choose report type and report criterial below:

Report type:

Building:

Tenancy:

Trading As:

Requested By:

Type:

Category:

Job status:

Date from:  (Eg: dd/MM/yyyy)

Date to:  (Eg: dd/MM/yyyy)

[Show Report](#)

If web browser blocks pop-up window, please hold down "Ctrl" and click Show Report button.



To run the report, select the following parameters:

- **Type – Issue and/or Request;**
- **Category** – select the categories that you want to report on. You can select multiple options by holding down the **Ctrl** button while clicking on the categories;
- **Job Status** – Scroll through the list to select the statuses for your report;
- **From Date** – Click on the calendar option to select the beginning date; and,
- **To Date** – Click on the calendar option to select the end date.

Click on the **“Show Report”** button to open the report in a new window.

TSRID	Tenant	Type	Category	Fault	Level	Created	Completed	Closed	Job Status	Change Status	Cost (ex. GST)	Job Detail
<b>40 Cameron Ave Belconnen ACT</b>												
2705	Commonwealth of Australia	Issue	Air Conditioning	Too Cold		2012-02-15			Cancelled	NA		
2782	Commonwealth of Australia	Issue	Air Conditioning	Too Cold		2012-02-17	2012-02-17	2012-02-17	Closed	NA		Office cold
3371	Commonwealth of Australia	Issue	Air Conditioning	Noise From Thermostat		2012-03-15			In Progress	NA		Test
3374	Commonwealth of Australia	Issue	Lifts & Escalators	Ball Faulty		2012-03-15	2012-03-15		Completed	NA		
3398	Commonwealth of Australia	Issue	Fire Protection	Extinguisher Missing		2012-04-05			In Progress	NA		test brookfield
3417	Commonwealth of Australia	Issue	Air Conditioning	Too Cold		2012-04-13			Acknowledged	NA		The cold in office
3419	Commonwealth of Australia	Issue	Air Conditioning	Too Cold		2012-04-29			Submitted	NA		too cold in office
3430	Commonwealth of Australia	Issue	Air Conditioning	Noise From Thermostat		2012-05-01			Submitted	NA		test
<b>Total:</b>											<b>\$0.00</b>	

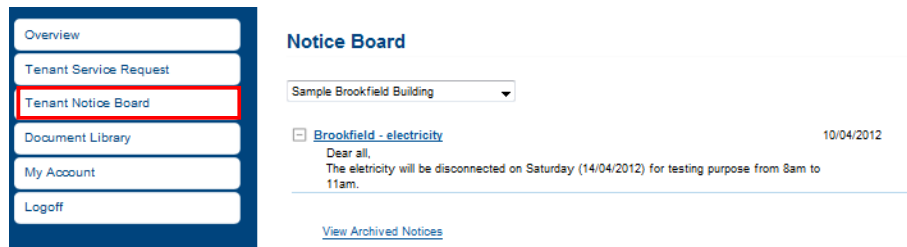
If your browser's pop up blocker does not let the report open, hold down the **Ctrl** key while clicking on the **“Show Report”** button.





## Other Features

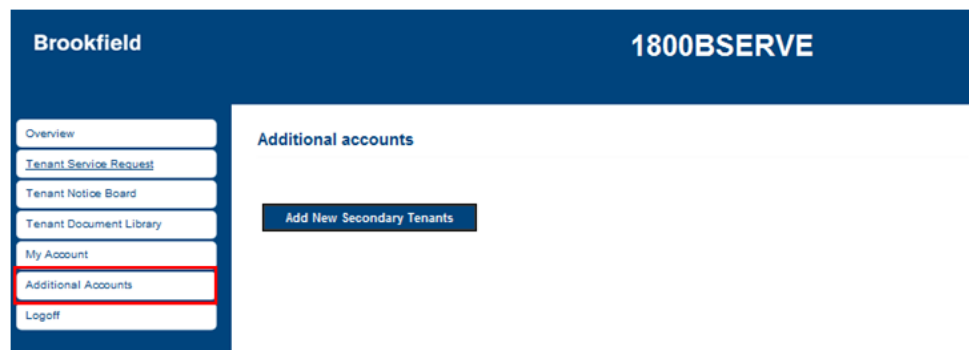
**Tenant Notice Board** The **Tenant Notice Board** menu provides access to current and archived notices that have been uploaded by the Building Supervisor. Further details and attachments can be viewed by expanding the notice detail.



**Adding an Additional Account** As a primary tenant to **1800BSERVE**, you are able to add additional accounts to access **1800BSERVE**.

In **1800BSERVE**, click the Additional Accounts menu option.

Click the **Add New Secondary Tenants** button



Enter the name and email address of the new account holder, ensuring to confirm the email address.



Select the tenancy by clicking on the check box. Click the save button

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Overview  
 Tenant Service Request  
 Tenant Notice Board  
 Tenant Document Library  
 My Account  
 Additional Accounts  
 Log off

**Secondary tenant**

Name   
 Email   
 Confirm email   
 Mobile   
 Default tenancy

Select tenancies

Sample Fashion (Level R2)  Bean Counter Accounting Services

**Save** **Cancel**

A temporary password will be sent to secondary tenant and they will be able to login to 1800BSERVE.

### Document Library

The **Document Library** is a central storage location for documents that need to be accessed by tenants. These documents are loaded into **1800 BSERVE** by the Building Supervisor.

Select **Document Library** menu to access items stored. Documents can be opened by clicking on the document name.

Overview  
 Tenant Service Request  
 Tenant Notice Board  
**Document Library**  
 My Account  
 Logoff

**Documents for Tenants**

Sample Brookfield Building

File	SizeCreated
[-] After Hours Information	
385.pdf	45402/05/2012 KB
testdoc.pdf	12.016/04/2012 KB
emergency contact.pdf	25.510/04/2012 KB



## Summary of Issue or Request Status

Status	Explanation
Submitted	Assigned to new TSR requests that have been submitted by tenants
Acknowledged	Confirms that the Building Supervisor has acknowledged receipt of the TSR
Preparing Quote	Indicates that a Quotation is being prepared for the TSR
Quote Issued	Indicates that a Quotation has been sent to the tenant.
In Progress	Indicates that work is "In Progress" (e.g. goods have been ordered or contractors engaged).
Delayed	Indicates that work has been "Delayed". Normally an explanation and estimated completion date will be entered at this status update.
Cancelled	Indicates that the TSR has been "Cancelled".
Completed	Indicates that the work has been "Completed"
Closed	Indicates that the TSR has been "Closed".