



## 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](http://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](http://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.

You will receive a confirmation email with the following information:



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:

**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](http://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:
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.

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.

Home

My Account | Logout

BEST PROPERTIES

POWERED BY: Genea

Region: Western

Building: 23091 Via Del Rio

Tenant: ABC Capital

Area:

Please select an Area from above.

- All (6) Tenant Areas
- Suite 105 - Entire Suite
- Suite 105 - Accounting Office
- Suite 105 - CEO's Office
- Suite 105 - CFO's Office
- Suite 105 - Conference Room
- Suite 105 - Marketing Office

Menu

- HVAC & Light Service
- Lease Information
- Reports
- Training Videos

Did you know?

You can also request air conditioning and lighting service over the telephone.

[Email me my Access Codes](#)



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

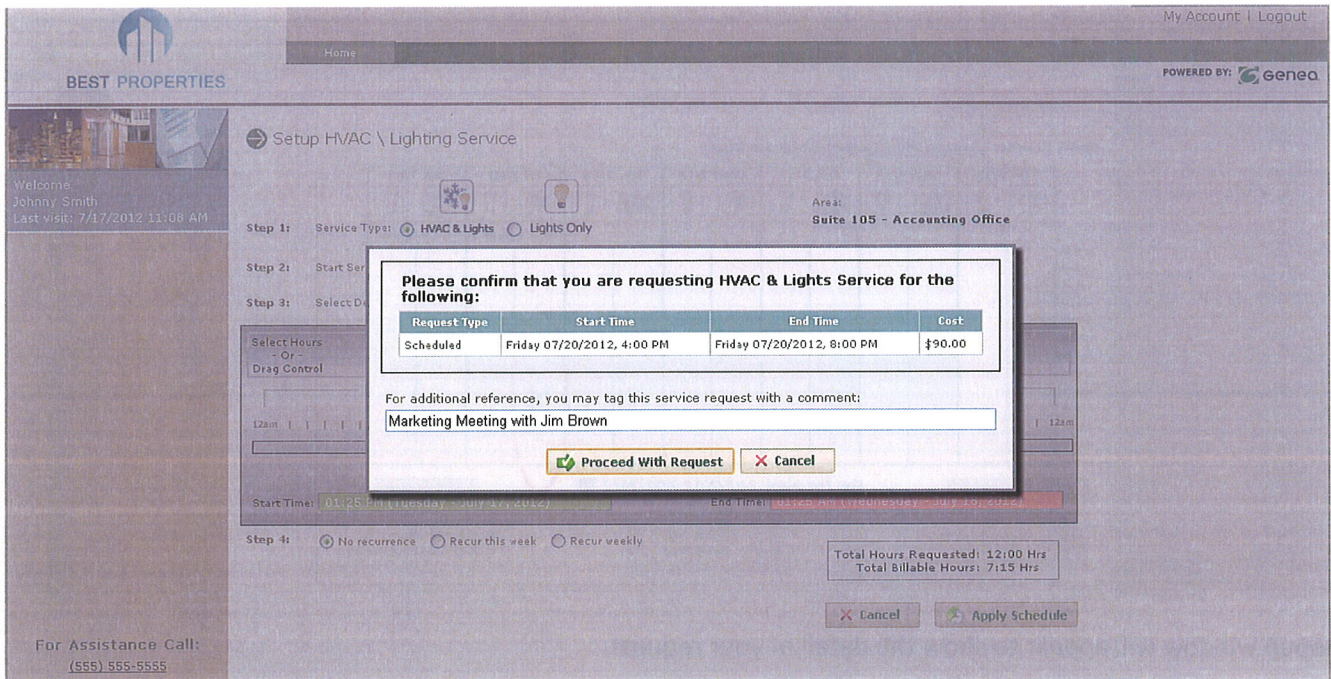
The screenshot shows the 'Setup HVAC \ Lighting Service' interface. At the top, there is a navigation bar with 'Home', 'My Account | Logout', and 'POWERED BY: genea'. The main header includes the 'BEST PROPERTIES' logo and a welcome message for Johnny Smith. The service type is set to 'HVAC & Lights'. Step 2, 'Start Service', shows a date field with 'Tuesday - July 17, 2012' and a small calendar icon circled in red. Step 3, 'Select Desired Hours', features a calendar for July 2012 and a time selection interface. The start time is '01:25 PM (Tuesday - July 17, 2012)' and the end time is '01:25 AM (Wednesday - July 18, 2012)'. A summary box shows 'Total Hours Requested: 12:00 Hrs' and 'Total Billable Hours: 7:15 Hrs'. Buttons for 'Cancel' and 'Apply Schedule' are at the bottom.

**Step 3** Select the desired hours for the HVAC/Lighting service by choosing the start and stop time from the pull down menu. On the right bottom corner you will see the number of billable hours.

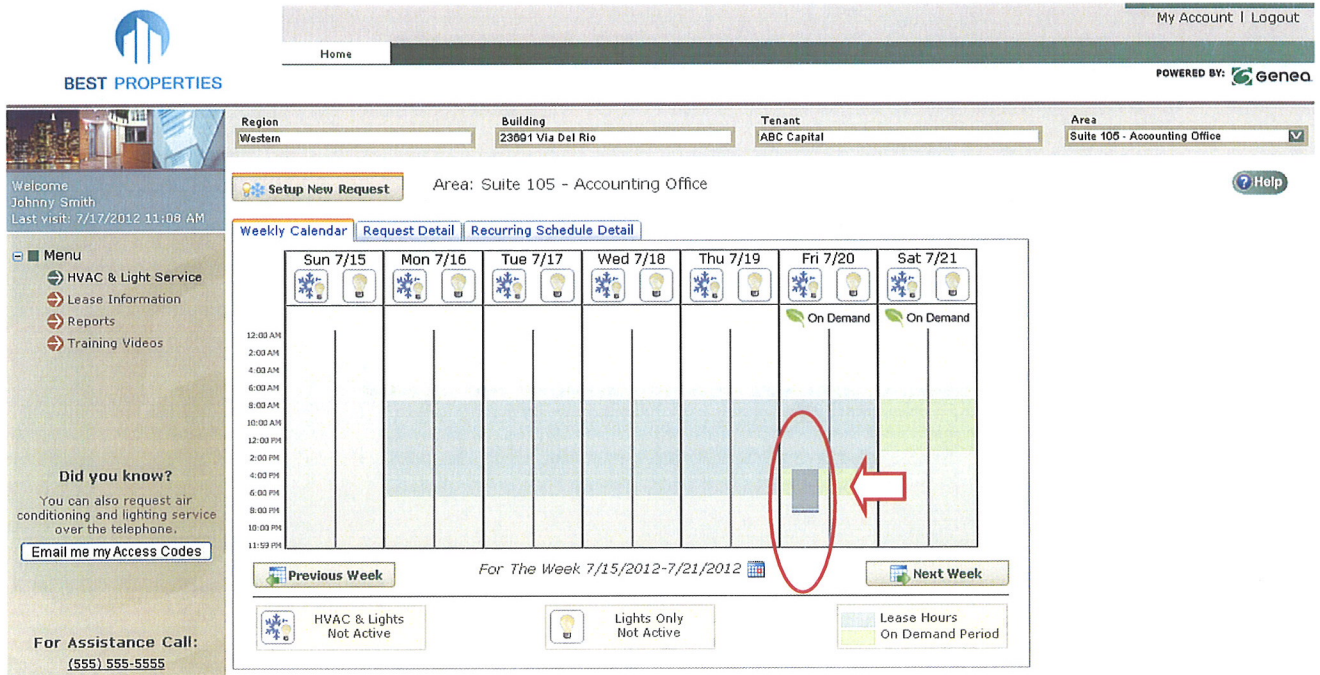
This screenshot shows the same interface as Step 2, but with Step 3 completed. The start date is now 'Friday - July 20, 2012'. The 'Select Desired Hours' section shows a time selection interface where the start time is '06:00 PM (Friday - July 20, 2012)' and the stop time is '10:00 PM (Friday - July 20, 2012)'. Both the time selection dropdowns and the resulting times are circled in red. The summary box at the bottom right now shows 'Total Hours Requested: 4:00 Hrs' and 'Total Billable Hours: 4:00 Hrs', which is also circled in blue. The 'Apply Schedule' button is highlighted.



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.



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

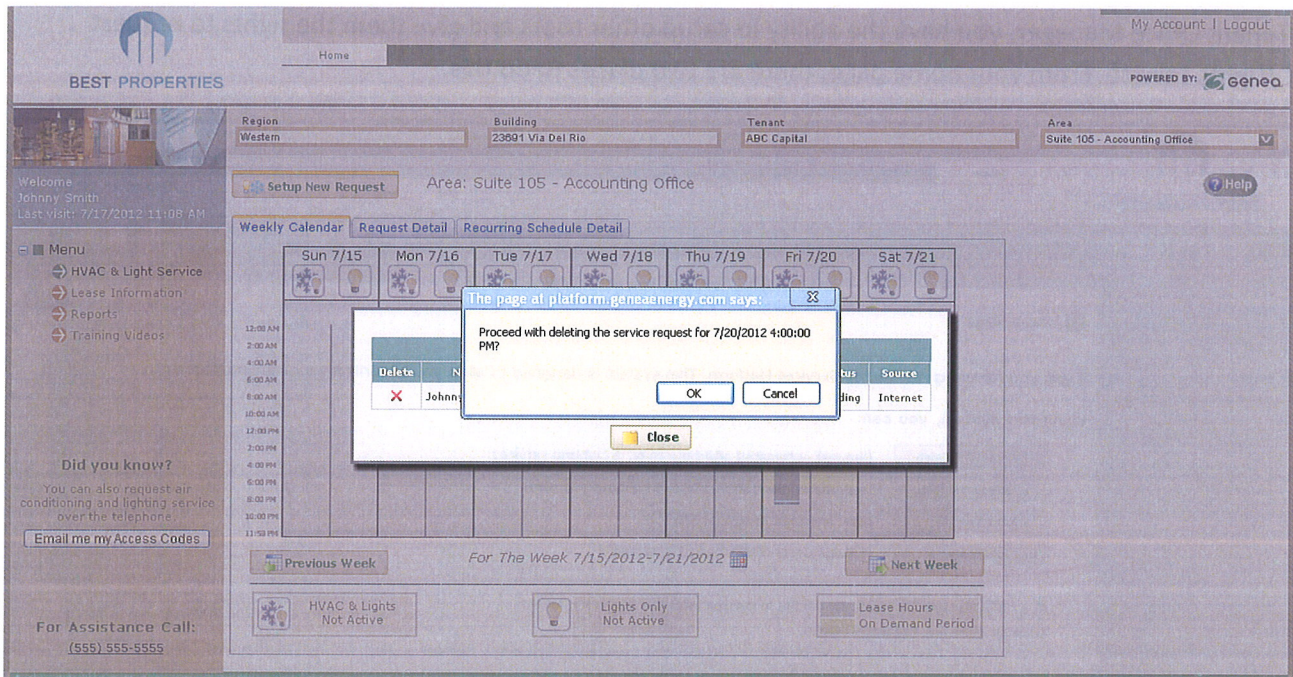
The screenshot displays the BEST PROPERTIES tenant office manager interface. At the top, there is a navigation bar with the company logo, a 'Home' button, and user account information ('My Account | Logout'). Below this, a search bar is present, and the interface is powered by Genea. The main content area shows filters for Region (Western), Building (23691 Via Del Rio), Tenant (ABC Capital), and Area (Suite 105 - Accounting Office). A 'Setup New Request' button is visible. The 'Request Detail' tab is selected and highlighted with a red circle. Below the tabs, a table lists request details:

Delete	First Name	Last Name	Start Time	Hours Requested	Service Type	Status	Source	Comment
X	Johnny	Smith	Fri 20-Jul-2012 04:00 PM	4 Hrs 0 Min	HVAC & Lights	Pending	Internet	Marketing Meeting with Jim Brown

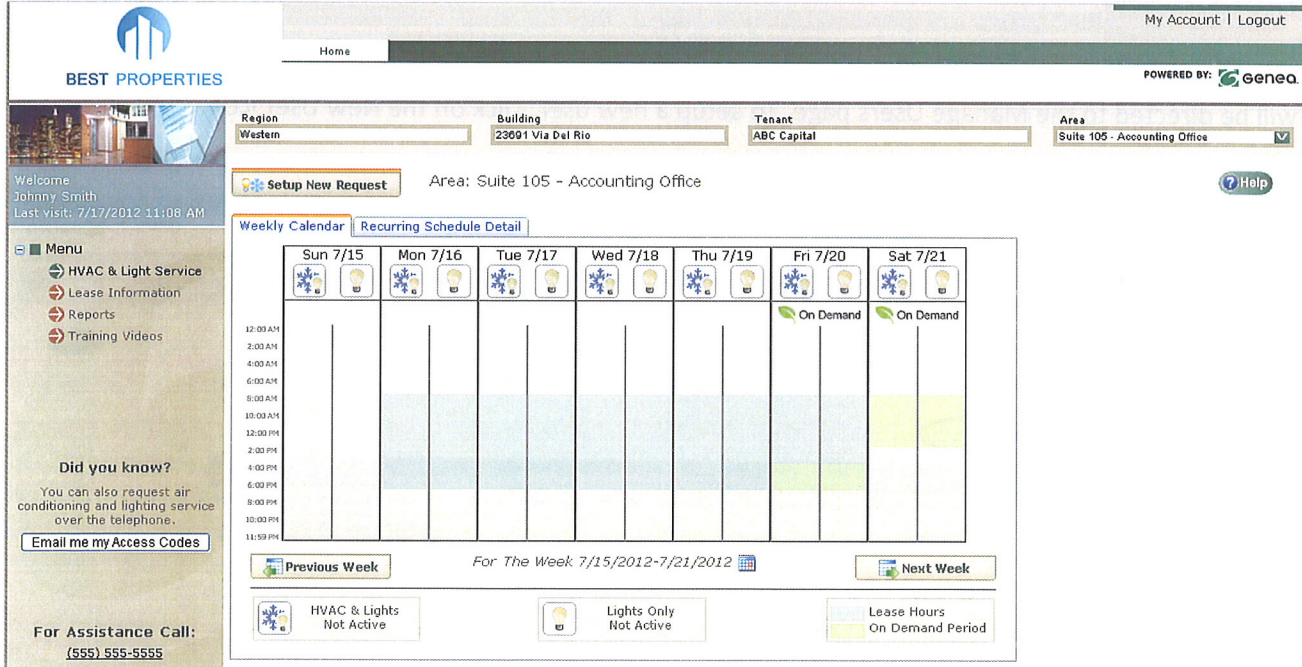
On the left side, there is a 'Menu' section with links for HVAC & Light Service, Lease Information, Reports, and Training Videos. Below the menu, there is a 'Did you know?' section with a tip about requesting air conditioning and lighting service over the telephone, and a button to 'Email me my Access Codes'. At the bottom left, there is contact information for assistance: 'For Assistance Call: (555) 555-5555'.



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.





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. Here is a brief description of the different levels:

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

You will be directed to the page that shows all the users for the area.

Edit User	Delete	Name	Email	Role	Access Level	Status	Phone User ID	Phone Area ID	Areas
		Johnny Smith	pchandra@geneenergy.com	Office Manager	Office Manager	Active	3217	101-6351 101-1110 101-8087	Suite 105, Accounting Office Suite 105, CEO's Office Suite 105, CFO's Office
		Bob Smith	bob@abccapital.com	Tenant User	AC and Lights	Pending	5407	101-6351 101-3218	Suite 105, Accounting Office Suite 105, Conference Room