



Building Engines Prism Feature Summary 2019

Available Now – Dec 6th, 2019

Work Order Module

Reactive Service Request Management

- Property manager or tenant user (optionally vendor) can log work order via web interface
- Work orders can be assigned to/completed by property management or vendors
- Work order can be dispatched manually
- Authorized users can view open and historical work orders.
 - Authorized Tenants can view their company's work orders
 - Authorized Vendors can view work orders assigned to their company
- Authorized property management and vendor users can change status of work order. System tracks date/time of status change
- Work order will include the following workflow stages: Open, On Hold, Complete, Close, Cancel
- Users can view work order list and filter by various means including status, building, priority and assignee
- User can export work order list to excel
- User can upload a photo to work order
- User can associate piece of equipment to work order (from work order edit screen)
- User can attach a file
 - Ability to scan an uploaded document for viruses
 - Delete work order photos
- Work order history reflects changes to work order including time of change

Tenant Satisfaction

- Tenant users will be asked to rate satisfaction for work orders they request

Stay on Top of Status and Other Changes

- User can opt in to "follow" a work order to receive notifications of changes
- User can "share" details of a work order via email
- Work order creators, requestors, assignees and followers (who proactively opt-in) receive email notifications related to work order creation and updates
- Property managers, vendors and tenants can comment on work orders. Property managers can indicate that comments are private and not to be viewable by tenants



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Quickly View and Manage Key Product Configurations

Manage Buildings/Companies/Users

- View primary contact within the building page
- Quickly and easily add buildings, vendors/tenant companies and users
- View & manage basic building details
 - Address, square footage, floors, photo, map, type, primary contact
- View & manage vendor and tenant company info including primary contact
- Invite new users and manage profiles
- Upload User Avatar photos
 - View assignees and requestor avatars in tasks and lists
- New location for the Employee ID within the User Profile. The Employee ID is also available within the User Grid.

Configuration and Administration

- User permissions controlling what users can see and edit are enforced based on permissions group. Exact permissions in each permissions group can be edited by administrator.
- Authorized users can set up tenant and vendor companies
- Authorized users can invite other users
- Ability to create custom fields for buildings, companies and users. Fields marked as “accounting related” can be included in work order charges export for use in accounting systems.

Accounting

- Create labor rates in the Admin menu. This will create the list of available rates within a work order for an assignee to choose from.
- Add labor rates and materials to an existing work order. View the summed labor and materials in the work order “Labor & Materials” tab
- Charge codes: set defaults for issue types, view & edit defaults in work order
- Billable work orders: set defaults for issue types, view & edit defaults in work order
- View/Filter by accounting fields (charges, expected billing) on work order grid
- Define target budget for work orders by issue type and building. This amount will be displayed in the details of the work order as a reference target.



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- Export line-item level work order charges including user-defined custom fields (if configured)

Issue Types- Admin Page

- View and manage the issue type configurations for all buildings under the Admin menu. This includes the following:
 - Edit priority levels (which control the SLA targets)
 - Auto-assign based on designated person for that issue type
 - Make the issue types visible to tenant users. This will allow a tenant to select that issue type when creating a work order. If hidden, only vendors/property managers can view this issue type.
 - Create a new issue type in an issue type category.
 - Edit settings on multiple properties at once
 - Ability to select multiple issue types and apply a bulk action or clear the selection on the following: Assign to, Priority level, Tenant visibility, Labor rate, Billable, Charge Codes, Taxable

Dashboards & Reports Highlight Key Operational Status

Dashboard

- Users can see key summary data on home dashboard including:
 - Unassigned tasks
 - Tasks by employee
 - On-hold tasks
 - Tasked assigned to the user
- Drill down from dashboard to detailed items

Reports

- Graphical reporting provides at-a-glance insights combined with tabular details.
- Rich filtering to pinpoint areas of interest. Filters vary by report and may include:
 - Date range
 - Building(s)
 - Work category/type
 - Assignee name and/or company
 - Requestor name and/or company
 - Status
 - Priority
 - Work order number
 - Billable amount



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- Report data can be exported
- Reports include:

Work order details report

- View counts of work order by:
 - Issue category and issue type
 - Status
 - Priority
 - Assignee
 - Assignee company including vendors
 - Requestor username and company

Work Order Labor and Materials Details Report

- View billable vs non-billable labor and materials

Work Order Billback Summary Report

- View billable amounts by issue type and charge type.

Preventive Maintenance Completion Report

- Display Open vs. Closed Preventive Maintenance Tasks
- Display Counts by:
 - Assignee
 - Category

Search

- Search feature within all major grids allows for easy filtering. This can include search by work order number, users, and multiple other fields.

Bengie Tenant Chatbot

App-free method for tenants to request services and view building info.

- Create new work order
- View existing work orders
 - Add a comment or image
 - Cancel request
- View contact information for coworkers in the building
- View property management contact information



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Preventive Maintenance Module

Manage Equipment

- View / maintain equipment list
- Manage equipment details including warranty info
- View service and reactive work order history on Equipment records

Manage Schedules

- View/Edit Maintenance Schedules, including maintenance procedures
- Describe parts, tools and PPE required by the task
- Efficient management of maintenance schedules and tasks, by Asset Type
- Annual, semi-annual, quarterly, and monthly recurrence patterns

Complete PM Tasks

- Complete PM tasks for a variety of equipment asset types
- Assign PM tasks to PMO employees or vendors
- Create, View and Edit Maintenance Schedules
- New Equipment Record fields (including warranty)
- Users can reassign PM tasks to PMO employees or vendors
- View equipment service history
- View PM task history

Prism Mobile App for Engineers

Mobile app allows engineers to quickly and easily complete assigned work order and PM tasks – even when offline.

- Native apps
 - iOS app available in iTunes store
 - Android app available in Google play

Quickly Find Tasks and Complete Tasks

- Create a work Order in Mobile for IOS
- Users can view Work Orders and PM tasks that are assigned to them
- Sort by Priority, or by Due Date
- View a list of Unassigned work



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- Filter by task type on mobile
- Work in multiple buildings - building selection w/ type ahead
- Complete assigned work orders
- Complete assigned PM tasks -- including viewing maintenance procedure
- Engineers can complete assigned Preventive Maintenance tasks within the Prism mobile application for Android.

View Key Information

- View & photos attached to work orders
- Enhanced photo interaction (multi-photo carousel, landscape, zoom)
- View and add comments
- Quickly contact requestor (phone call or comment)
- View their recently completed work
- View WO and PM task history
- User avatar photo to easily recognize requestor
- Create a work order within the Prism mobile application for iOS

Authentication

- with email/password login
- Single Sign-On available

Mobile - Work Offline

- Users can view WO and PM tasks
- Users can edit and complete tasks while offline
- Offline work is timestamped when work done/change made with actual times synced when online

Building Communications Module

- Authorized users can send broadcast-style messages to interested parties
- Create audience (recipients)
 - Target Buildings and Organization Type (Property Management, Vendor, and/or Tenant)
 - Add additional recipients using email addresses and/or mobile phone numbers
 - View list of audience members in a pop-up
 - Pre-defined audience or create and save custom audiences



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- Create message
 - Draft text of message and add an optional image
 - Include an optional subject line
 - Alternatively, edit an existing draft by clicking on it in the grid view
- Send message immediately or save as a draft
- Delivery
 - Audience members receive either emails or SMS text messages (or both if both are provided)
 - Users manage their own opt-out on both channels

APIs

- Work Order API supporting available work order functions
- Equipment API providing access to equipment data
- APIs support User Defined Fields for Buildings, Companies and users