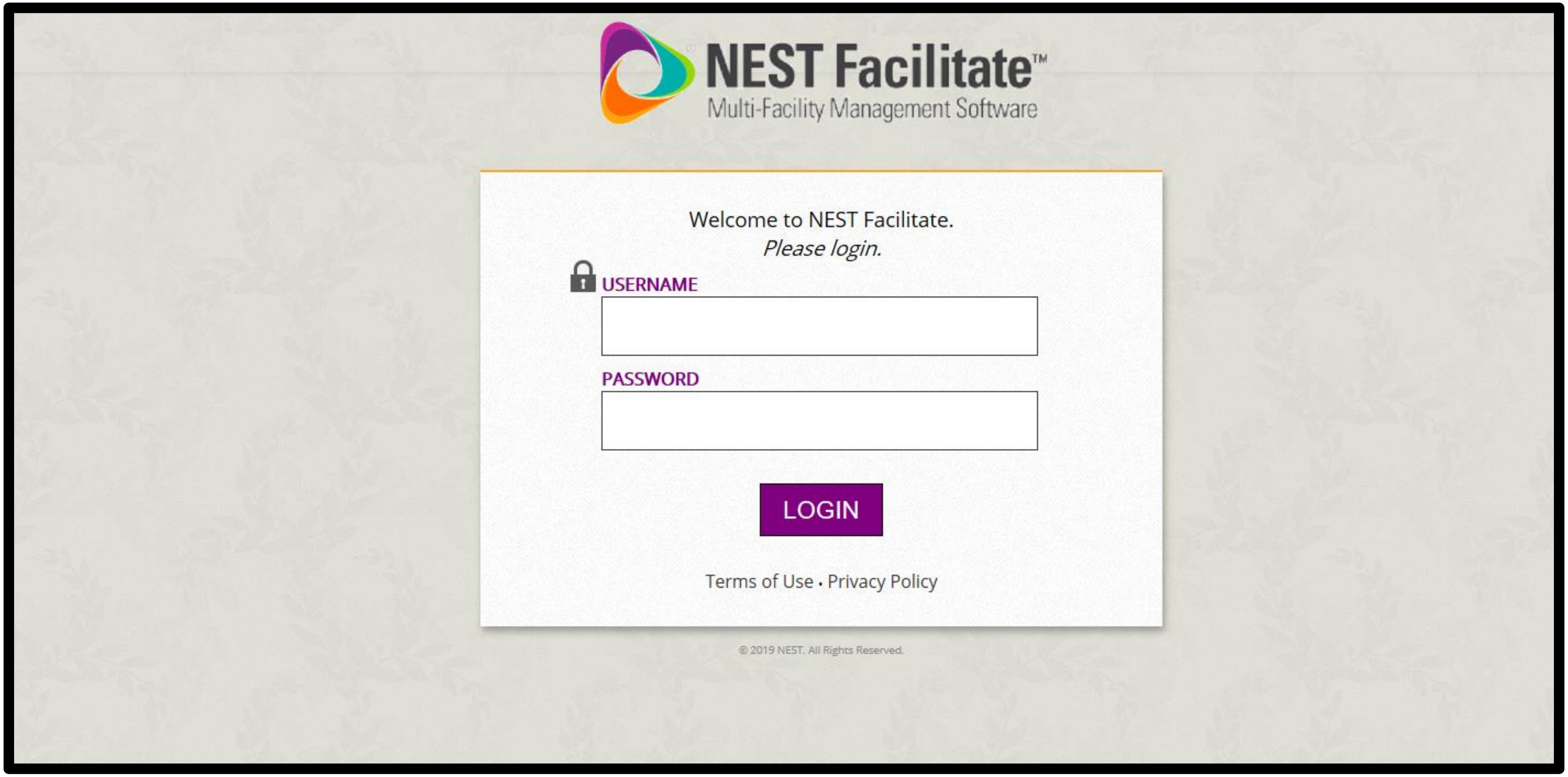
NEST | Multi-Facility Management

CLIENT PORTAL USER GUIDE – CORPORATE USER

The Login Page



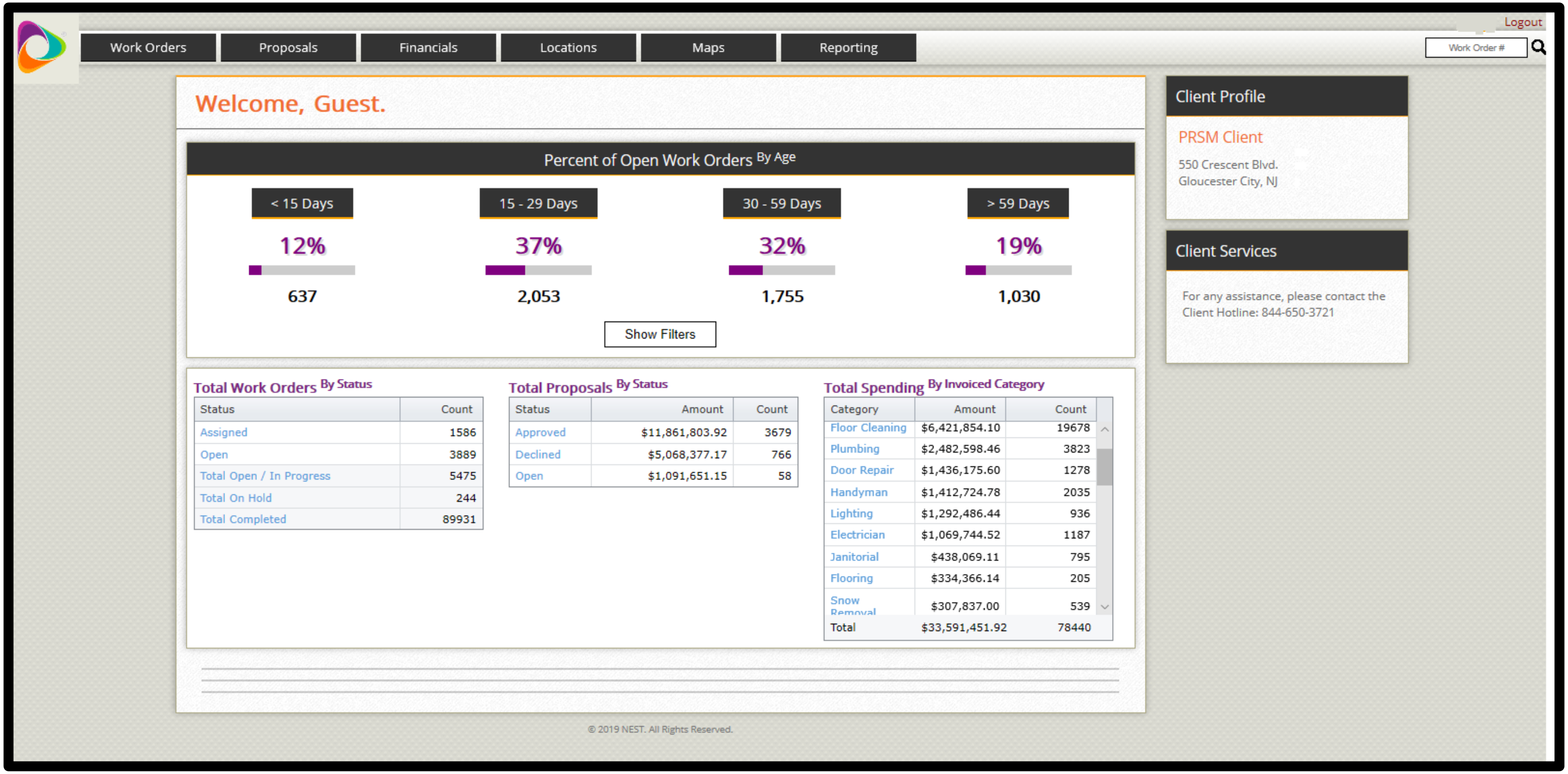
The Login Page

To access the Client Portal, click the Facilitate icon on your desktop.

A username and password is provided to you by NEST. You may have multiple users associated with your Client Portal.

Should you need further information or have questions, you can reach out to our sales team at:
sales@enternest.com

The Home Page

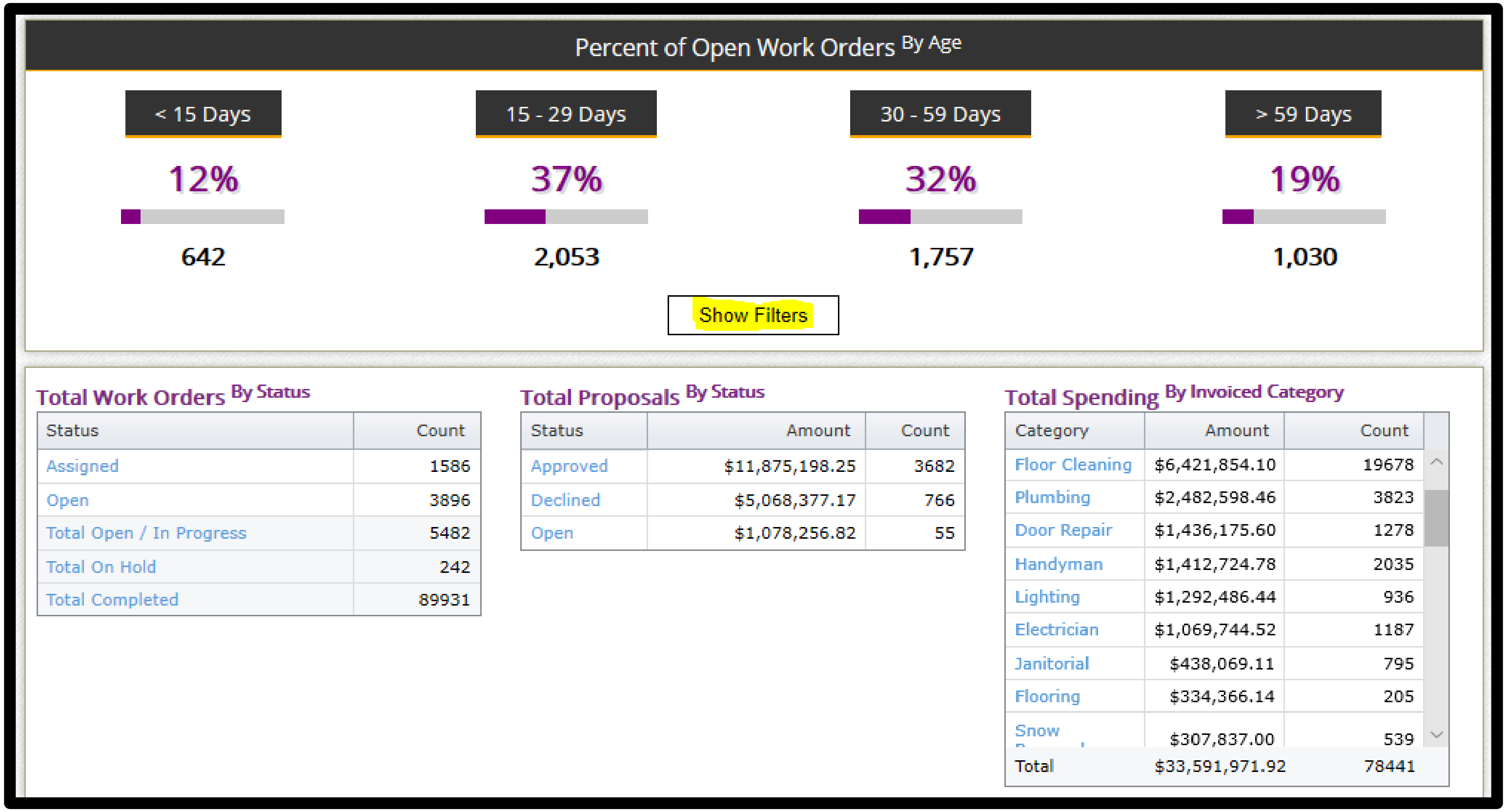


NEST Multi-Facility Management

The Home Page

The Home Page is designed to provide a high level overview of our clients’ work orders. Each section can be filtered and modified differently to display various results and statistics.

The Home Page



Total Work Orders By Status

Status	Count
Assigned	1586
Open	3896
Total Open / In Progress	5482
Total On Hold	242
Total Completed	89931

Total Proposals By Status

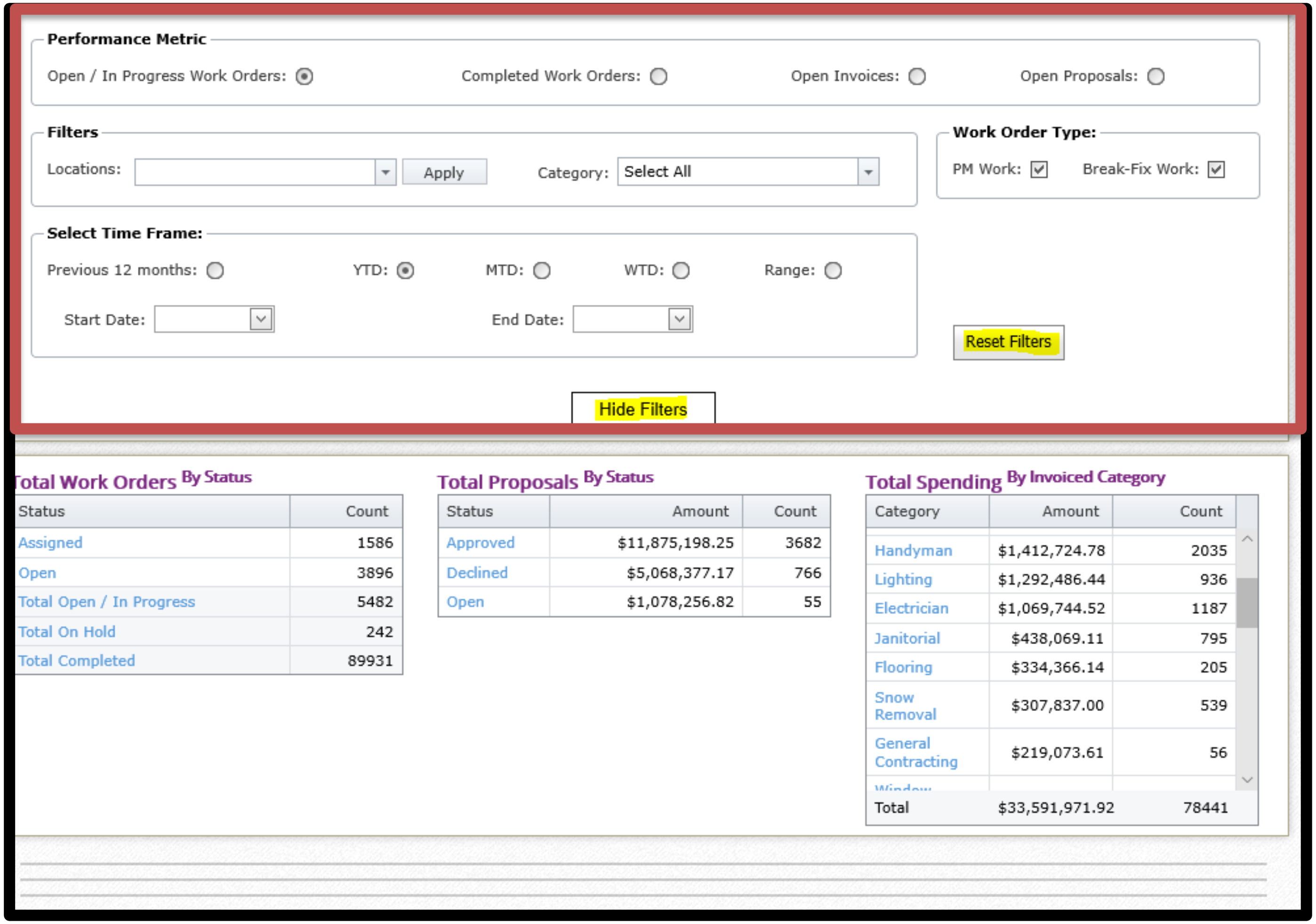
Status	Amount	Count
Approved	$11,875,198.25	3682
Declined	$5,068,377.17	766
Open	$1,078,256.82	55

Total Spending By Invoiced Category

Category	Amount	Count
Floor Cleaning	$6,421,854.10	19678
Plumbing	$2,482,598.46	3823
Door Repair	$1,436,175.60	1278
Handyman	$1,412,724.78	2035
Lighting	$1,292,486.44	936
Electrician	$1,069,744.52	1187
Janitorial	$438,069.11	795
Flooring	$334,366.14	205
Snow	$307,837.00	539
Total	$33,591,971.92	78441

Clicking "Show Filters" will bring down a set of filters that you can choose to modify

The Home Page



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Janitorial	$438,069.11	795
Flooring	$334,366.14	205
Snow Removal	$307,837.00	539
General Contracting	$219,073.61	56
Total	$33,591,971.92	78441

Modifying the items in the red box will cause the categories at the bottom to change. You can also reset your filters to default by clicking “Reset Filters” and hide the filters by clicking “Hide Filters”.

The Home Page – Bottom Section

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Snow Removal	$307,837.00	539
General Contracting	$219,073.61	56
Total	$33,591,971.92	78441

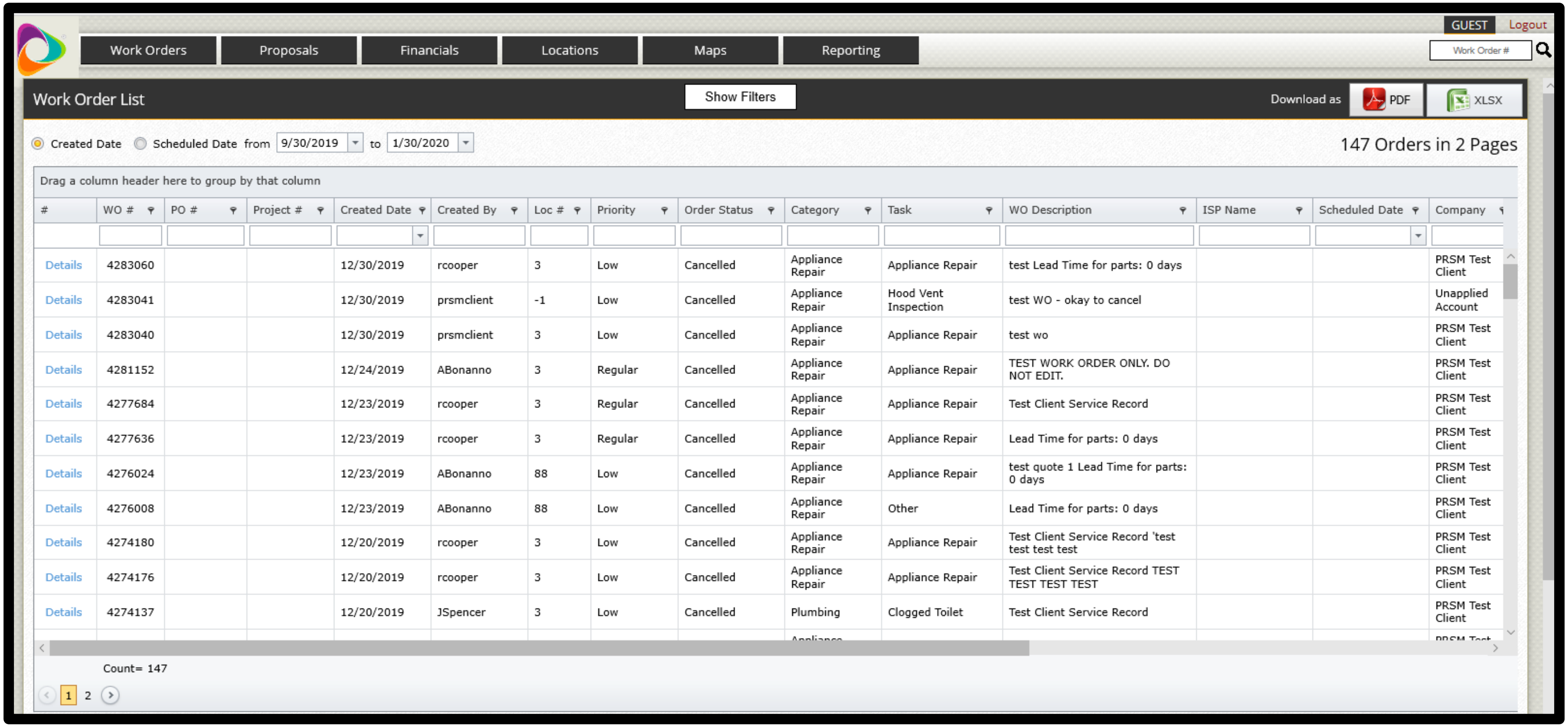
The Home Page – Bottom Section

The bottom portion of the Home Page is designed to show you your financial information.

It will display this information by work order status, proposal status, and category.

The filters at the top of the page will also affect the financial charts at the bottom

The WO List



Work Orders | Proposals | Financials | Locations | Maps | Reporting

GUEST Logout

Work Order #

Work Order List

Show Filters

Download as PDF XLSX

Created Date Scheduled Date from 9/30/2019 to 1/30/2020

147 Orders in 2 Pages

Drag a column header here to group by that column

#	WO #	PO #	Project #	Created Date	Created By	Loc #	Priority	Order Status	Category	Task	WO Description	ISP Name	Scheduled Date	Company
Details	4283060			12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	test Lead Time for parts: 0 days			PRSM Test Client
Details	4283041			12/30/2019	prsmclient	-1	Low	Cancelled	Appliance Repair	Hood Vent Inspection	test WO - okay to cancel			Unapplied Account
Details	4283040			12/30/2019	prsmclient	3	Low	Cancelled	Appliance Repair	Appliance Repair	test wo			PRSM Test Client
Details	4281152			12/24/2019	ABonanno	3	Regular	Cancelled	Appliance Repair	Appliance Repair	TEST WORK ORDER ONLY. DO NOT EDIT.			PRSM Test Client
Details	4277684			12/23/2019	rcooper	3	Regular	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record			PRSM Test Client
Details	4277636			12/23/2019	rcooper	3	Regular	Cancelled	Appliance Repair	Appliance Repair	Lead Time for parts: 0 days			PRSM Test Client
Details	4276024			12/23/2019	ABonanno	88	Low	Cancelled	Appliance Repair	Appliance Repair	test quote 1 Lead Time for parts: 0 days			PRSM Test Client
Details	4276008			12/23/2019	ABonanno	88	Low	Cancelled	Appliance Repair	Other	Lead Time for parts: 0 days			PRSM Test Client
Details	4274180			12/20/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record 'test test test test			PRSM Test Client
Details	4274176			12/20/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record TEST TEST TEST TEST			PRSM Test Client
Details	4274137			12/20/2019	JSpencer	3	Low	Cancelled	Plumbing	Clogged Toilet	Test Client Service Record			PRSM Test Client

Count= 147

1 2

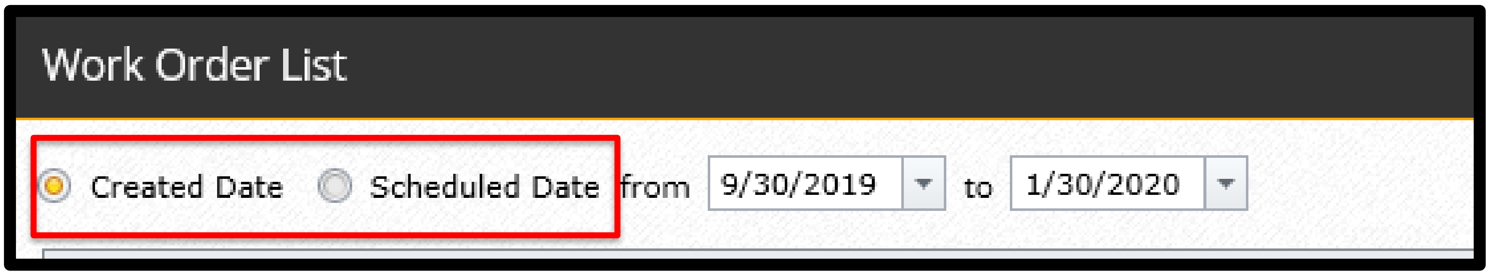
The WO List

The WO List (Work Order List) is designed to show you various work orders associated with your locations.

The WO List is very flexible—you can manipulate the date ranges, filter and sort your columns, search by your PO number or NEST's work order number, and search by work order type.

This list of work orders can even be exported to Adobe PDF or Excel.

The WO List



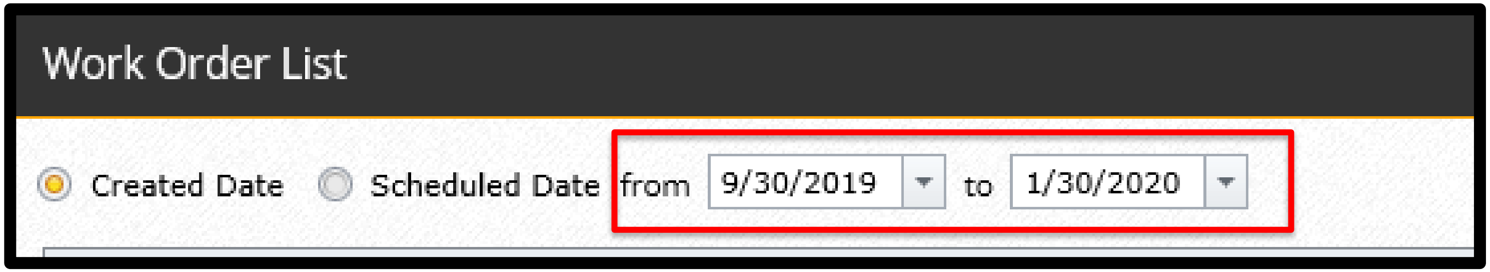
The "Date Filter Type" is very important when searching for information on the Client Portal.

Setting your type will dictate which work orders you see in the WO List.

The type of "Created Date" will display work orders based on their created date, which means you will see work orders in the list that NEST has not yet scheduled.

The type of "Schedule Date" will *only* display work orders that have been given a schedule date by NEST.

The WO List

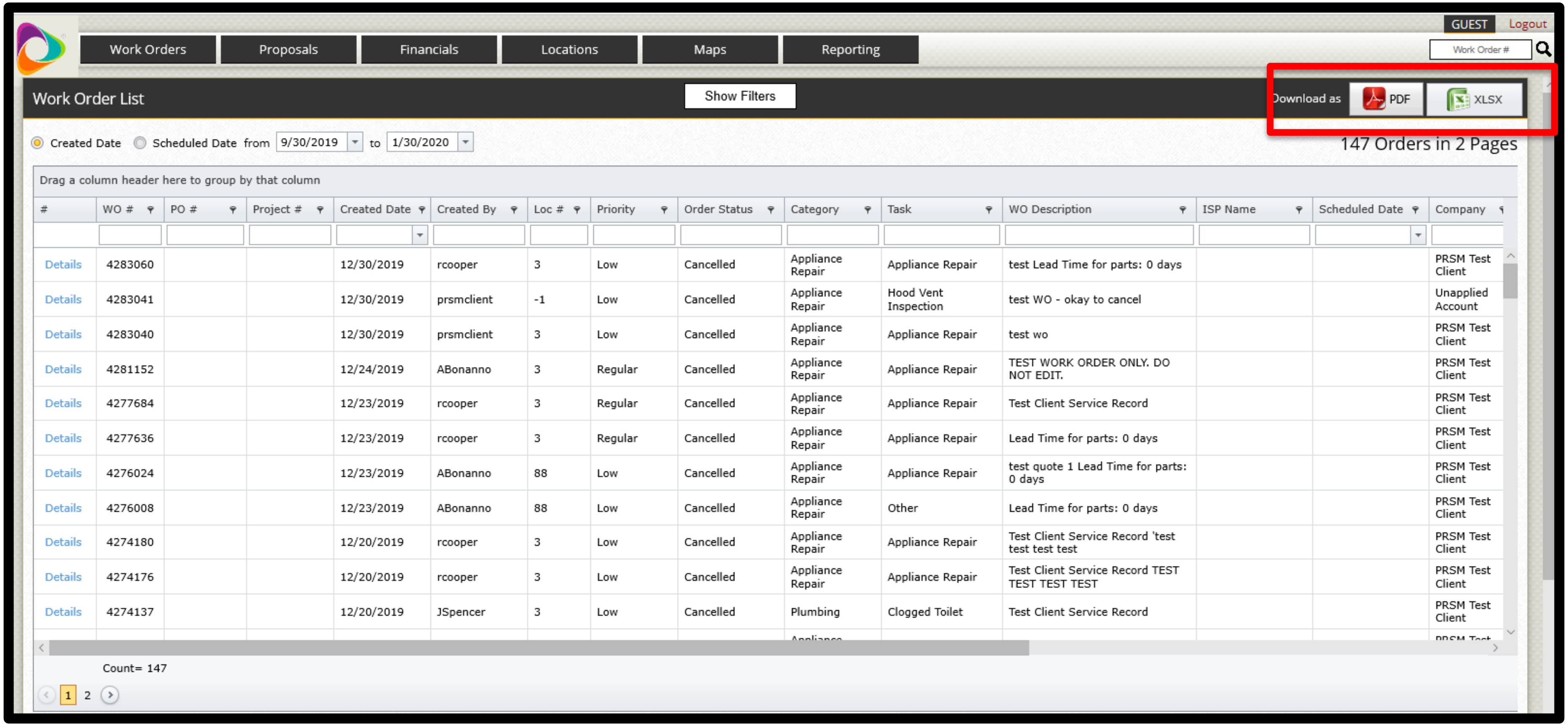


Once you decide on a Date Filter Type, you will want to adjust your date fields.

This will modify the work orders that appear in your list.

Remember your date fields coincide with your Date Filter Type. If you want to see work orders created or scheduled within a certain range, you must change the default dates that appear.

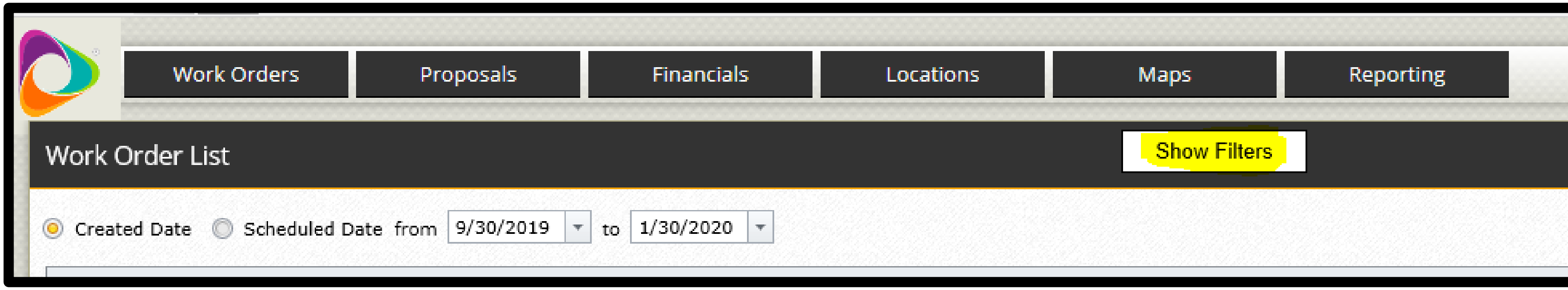
The WO List

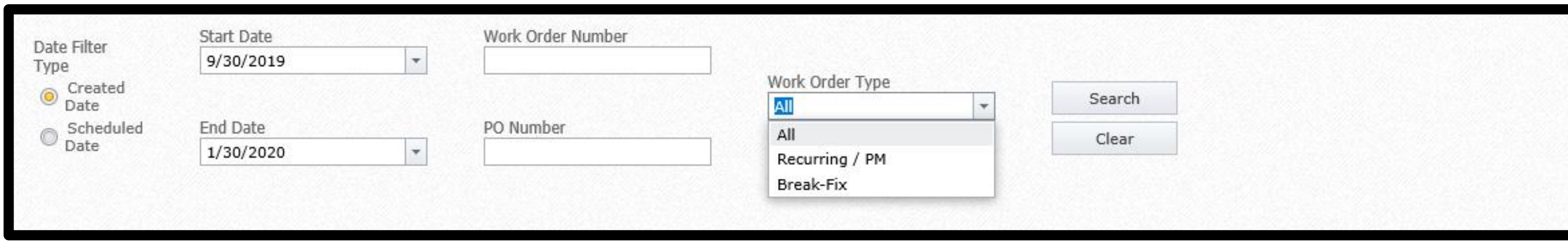


To export to PDF or Excel, click on of these two buttons.

NEST Multi-Facility Management

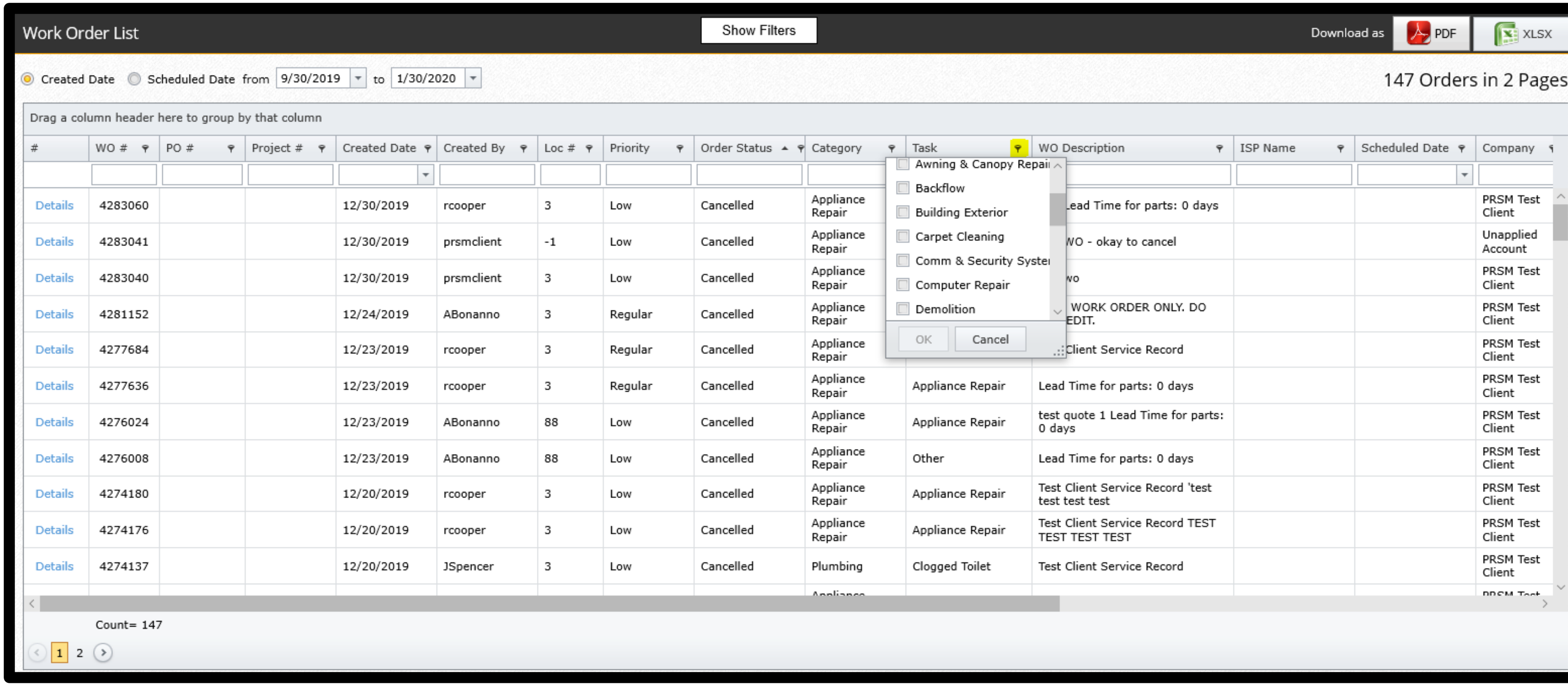
The WO List





You can also click “Show Filters” to drop down a list of additional filters for modifying your grid. You can also search by Work Order Number, PO Number, and Work Order Type.

The WO List



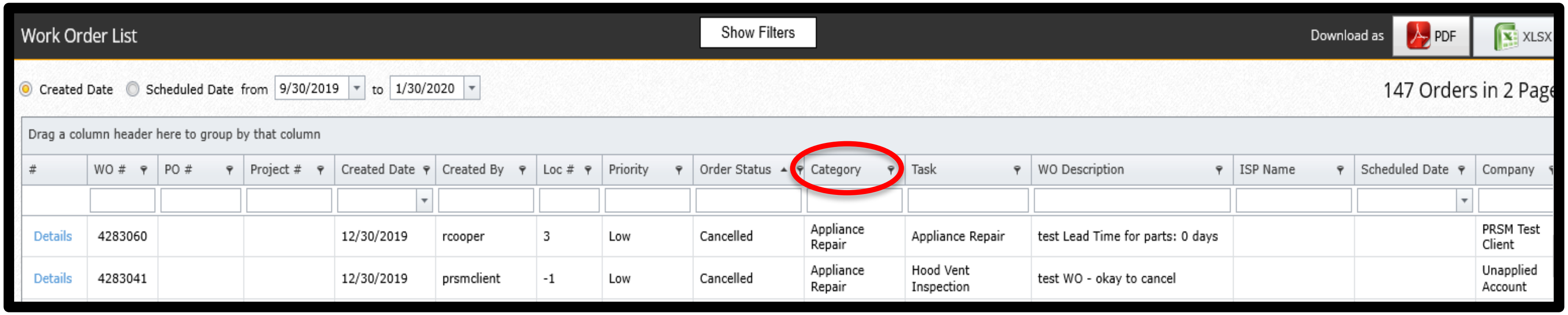
#	WO #	PO #	Project #	Created Date	Created By	Loc #	Priority	Order Status	Category	Task	WO Description	ISP Name	Scheduled Date	Company
Details	4283060			12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair		Lead Time for parts: 0 days			PRSM Test Client
Details	4283041			12/30/2019	prsmclient	-1	Low	Cancelled	Appliance Repair		WO - okay to cancel			Unapplied Account
Details	4283040			12/30/2019	prsmclient	3	Low	Cancelled	Appliance Repair		wo			PRSM Test Client
Details	4281152			12/24/2019	ABonanno	3	Regular	Cancelled	Appliance Repair		WORK ORDER ONLY. DO EDIT.			PRSM Test Client
Details	4277684			12/23/2019	rcooper	3	Regular	Cancelled	Appliance Repair		Client Service Record			PRSM Test Client
Details	4277636			12/23/2019	rcooper	3	Regular	Cancelled	Appliance Repair	Appliance Repair	Lead Time for parts: 0 days			PRSM Test Client
Details	4276024			12/23/2019	ABonanno	88	Low	Cancelled	Appliance Repair	Appliance Repair	test quote 1 Lead Time for parts: 0 days			PRSM Test Client
Details	4276008			12/23/2019	ABonanno	88	Low	Cancelled	Appliance Repair	Other	Lead Time for parts: 0 days			PRSM Test Client
Details	4274180			12/20/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record 'test test test test			PRSM Test Client
Details	4274176			12/20/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record TEST TEST TEST TEST			PRSM Test Client
Details	4274137			12/20/2019	JSpencer	3	Low	Cancelled	Plumbing	Clogged Toilet	Test Client Service Record			PRSM Test Client

To filter your columns, click on the small key icon next to each header name.

Clicking this will produce a list of items; you may pick one by which to filter.

NEST | Multi-Facility Management

The WO List



#	WO #	PO #	Project #	Created Date	Created By	Loc #	Priority	Order Status	Category	Task	WO Description	ISP Name	Scheduled Date	Company
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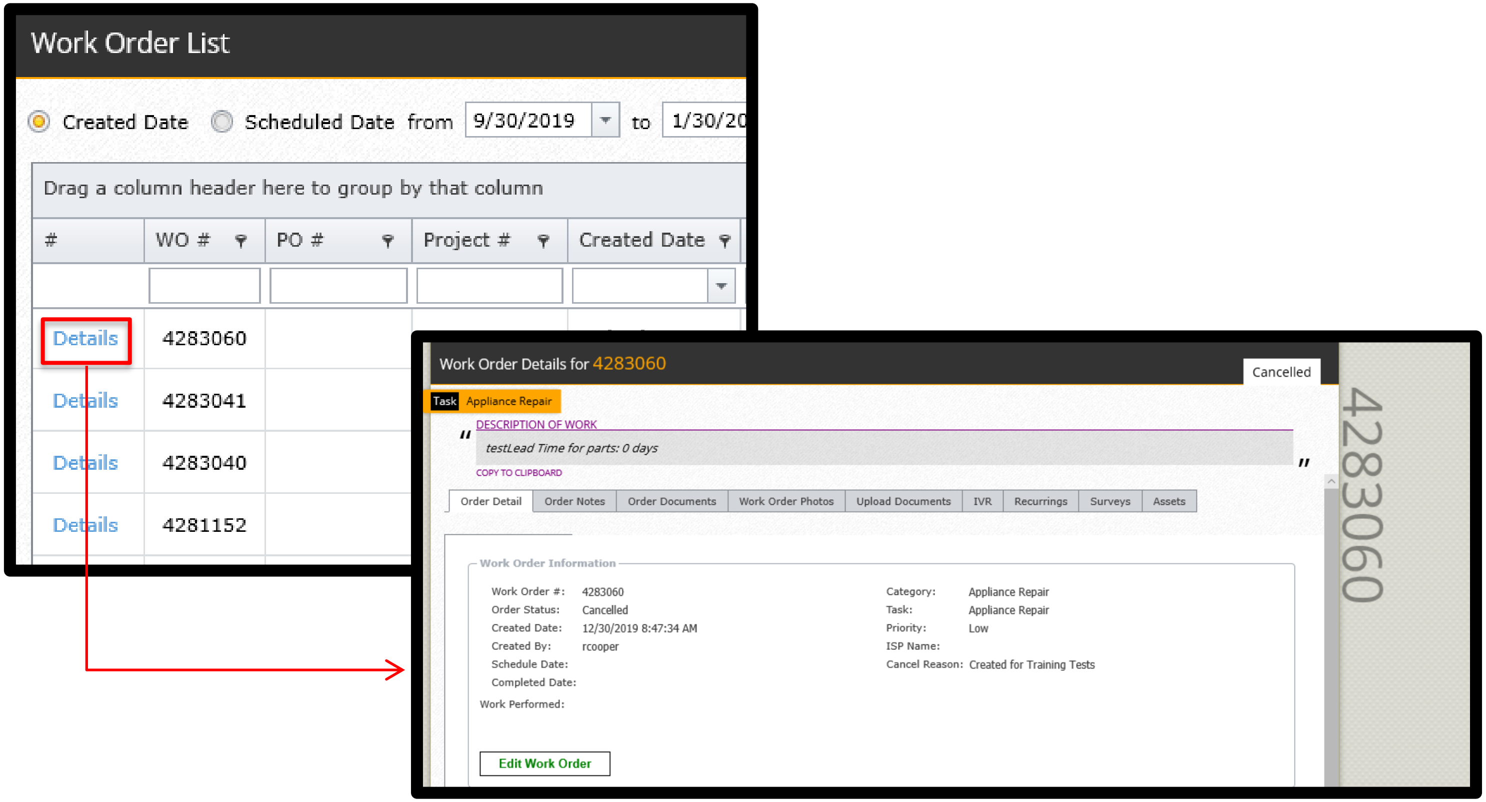
To sort your columns, simply click on the column header name.

Clicking twice will cause your list to reverse sort.

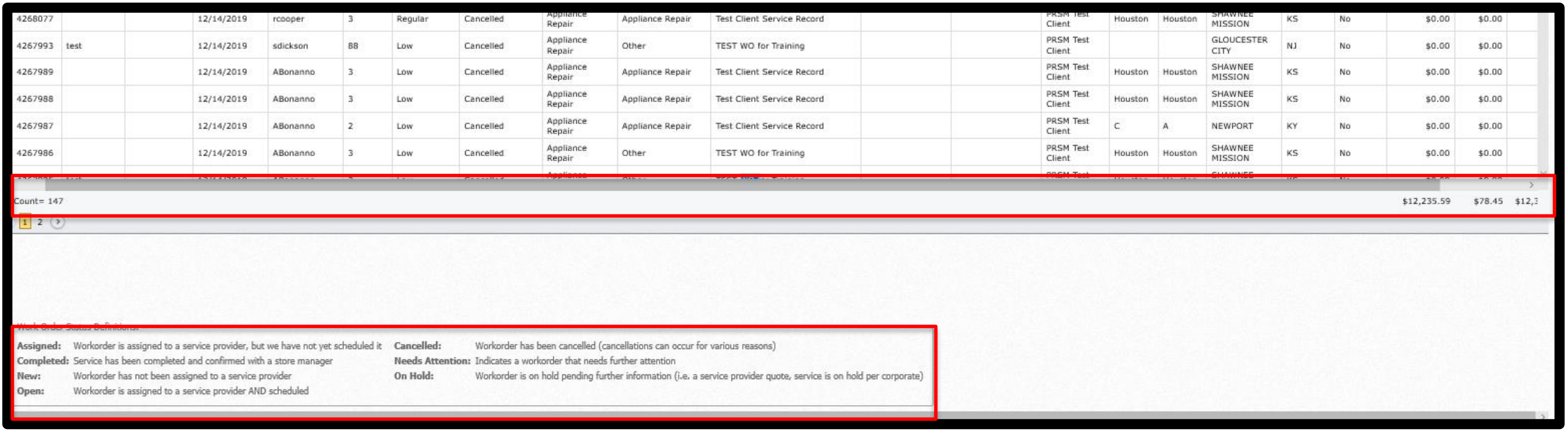
NEST | Multi-Facility Management

The WO List



To view a work order in more detail, click the “Details” icon in the work order list.

The WO List



At the bottom of the WO List tab, you can see totals, such as: Total count of work orders, total amount of Tax on each work order, or Subtotals of each work order.

You can also view definitions of our NEST work order statuses.

WO Details

- Marking an item as Capex
- Order Notes
  - Adding a note with email and adding a note without email
  - Action Required (higher priority, someone needs to take action)
  - Manual entry vs the pick list
- Order Documents
  - View all work order related documents not photos
- Upload Documents
  - Document Type select from prepopulated list
  - Where it is going to show up after they upload the document (depending on the type of document they chose when uploading)

Add WO

Add Work Order

Locations:

Drag a column header here to group by that column

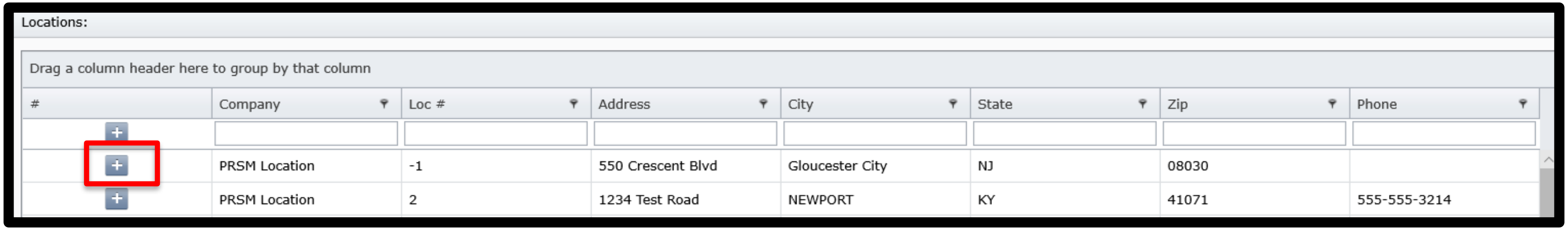
#	Company	Loc #	Address	City	State	Zip	Phone
+							
+	PRSM Location	-1	550 Crescent Blvd	Gloucester City	NJ	08030	
+	PRSM Location	2	1234 Test Road	NEWPORT	KY	41071	555-555-3214
+	PRSM Location	3	1234 Test Avenue	SHAWNEE MISSION	KS	66250	555-555-5555
+	PRSM Location	6	12345 TEST	SCHENECTADY	NY	12345	
+	PRSM Location	7777	TEST 1 MIDNIGHT	WAYNE	NJ	07470	973-232-7512
+	PRSM Location	825	550 Test Avenue	GLOUCESTER CITY	NJ	08030	856-720-5145
+	PRSM Location	87654321	test	ELDERSBURG	MD	21784	

Add WO

The Add WO tab allows you to add a new work order into the NEST database. This work order will automatically integrate itself with our database and alert our NEST users.

Before adding the work order to our system, the Client Portal will display the location's service history for your review.

Add WO



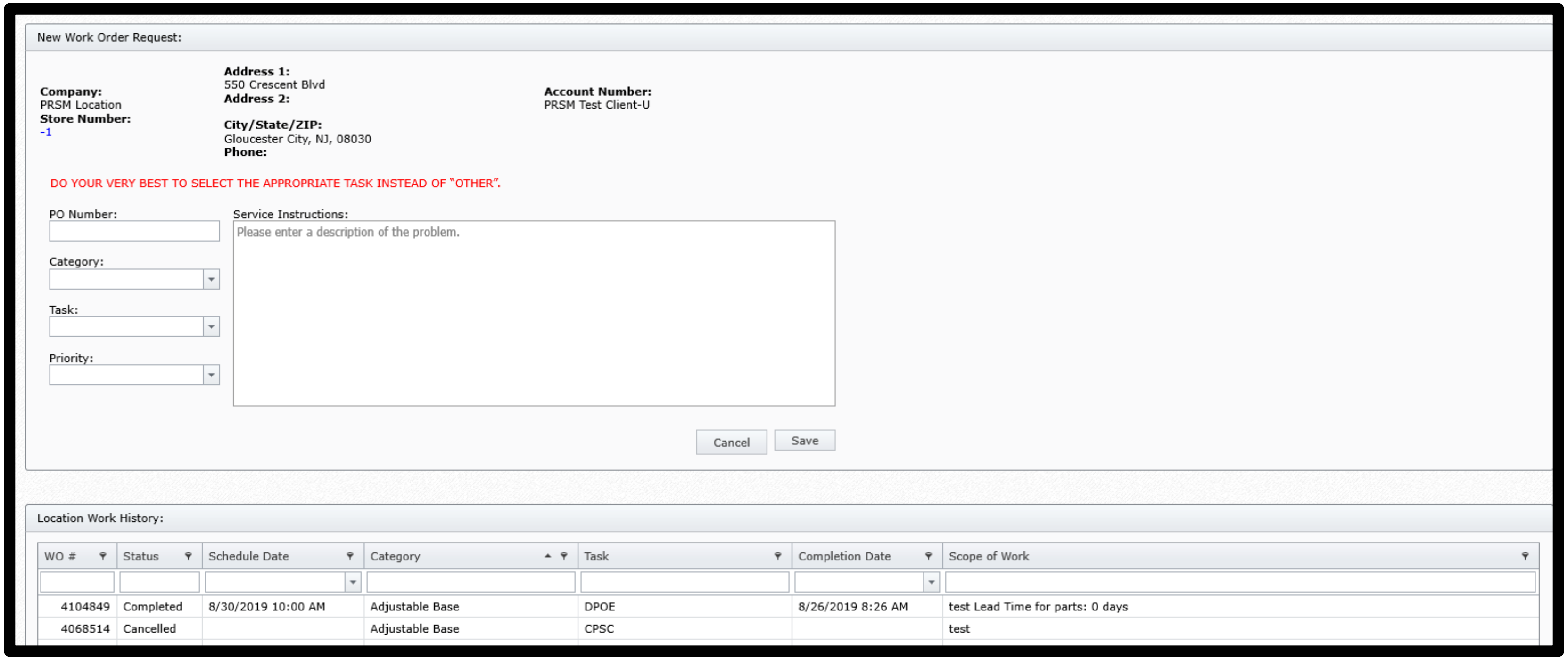
Locations:

Drag a column header here to group by that column

#	Company	Loc #	Address	City	State	Zip	Phone
+							
+	PRSM Location	-1	550 Crescent Blvd	Gloucester City	NJ	08030	
+	PRSM Location	2	1234 Test Road	NEWPORT	KY	41071	555-555-3214

To add a new work order to the NEST database, click the + sign next to the location of your choice.

Add WO

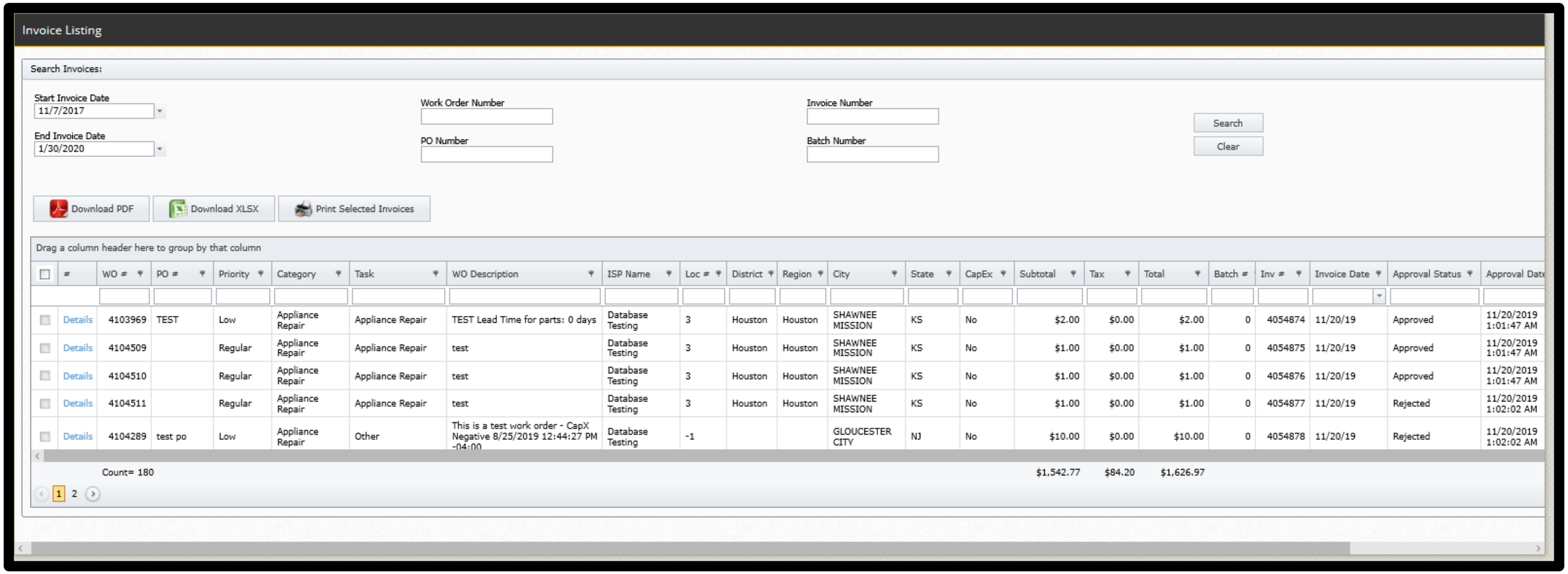


To add the details of a work order, fill in the fields to the left.

Upon clicking Save, the portal will generate a NEST work order number for you and display your new work order on the WO List tab.

Service history is found at the bottom of the screen.

Invoices



Invoice Listing

Search Invoices:

Start Invoice Date 11/7/2017

End Invoice Date 1/30/2020

Work Order Number

PO Number

Invoice Number

Batch Number

Search

Clear

Download PDF | Download XLSX | Print Selected Invoices

Drag a column header here to group by that column

	#	WO #	PO #	Priority	Category	Task	WO Description	ISP Name	Loc #	District	Region	City	State	CapEx	Subtotal	Tax	Total	Batch #	Inv #	Invoice Date	Approval Status	Approval Date
	Details	4103969	TEST	Low	Appliance Repair	Appliance Repair	TEST Lead Time for parts: 0 days	Database Testing	3	Houston	Houston	SHAWNEE MISSION	KS	No	$2.00	$0.00	$2.00	0	4054874	11/20/19	Approved	11/20/2019 1:01:47 AM
	Details	4104509		Regular	Appliance Repair	Appliance Repair	test	Database Testing	3	Houston	Houston	SHAWNEE MISSION	KS	No	$1.00	$0.00	$1.00	0	4054875	11/20/19	Approved	11/20/2019 1:01:47 AM
	Details	4104510		Regular	Appliance Repair	Appliance Repair	test	Database Testing	3	Houston	Houston	SHAWNEE MISSION	KS	No	$1.00	$0.00	$1.00	0	4054876	11/20/19	Approved	11/20/2019 1:01:47 AM
	Details	4104511		Regular	Appliance Repair	Appliance Repair	test	Database Testing	3	Houston	Houston	SHAWNEE MISSION	KS	No	$1.00	$0.00	$1.00	0	4054877	11/20/19	Rejected	11/20/2019 1:02:02 AM
	Details	4104289	test po	Low	Appliance Repair	Other	This is a test work order - CapX Negative 8/25/2019 12:44:27 PM -04:00	Database Testing	-1			GLOUCESTER CITY	NJ	No	$10.00	$0.00	$10.00	0	4054878	11/20/19	Rejected	11/20/2019 1:02:02 AM
		Count= 180													$1,542.77	$84.20	$1,626.97					

1 2

Invoices

The Invoices tab is designed to display all of your past, current, and upcoming invoices.

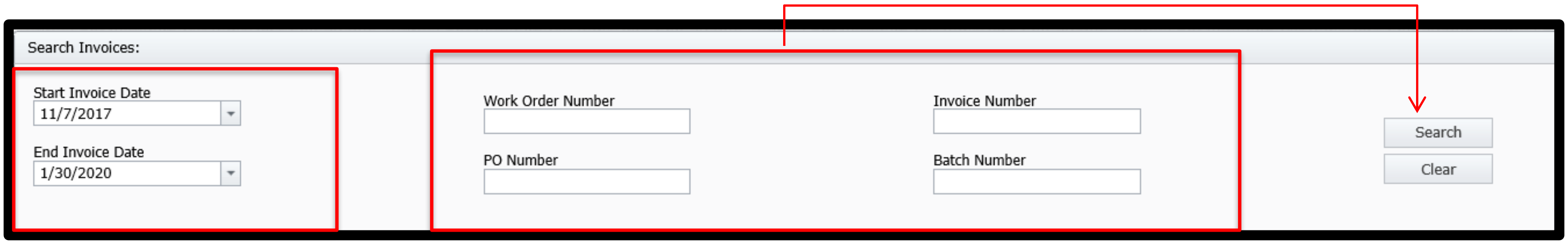
The Invoices tab is very flexible—you can manipulate the date ranges, filter and sort your columns, search for invoices by your PO number, NEST's work order number, and the Invoice & Batch numbers.

Each column within the Invoices tab will provide you with information that can help you to identify the work order and other invoice-related information.

This list of invoices can even be exported to Adobe PDF or Excel.

If you'd like to see a copy of any invoice, they can even be sent to you directly via email.

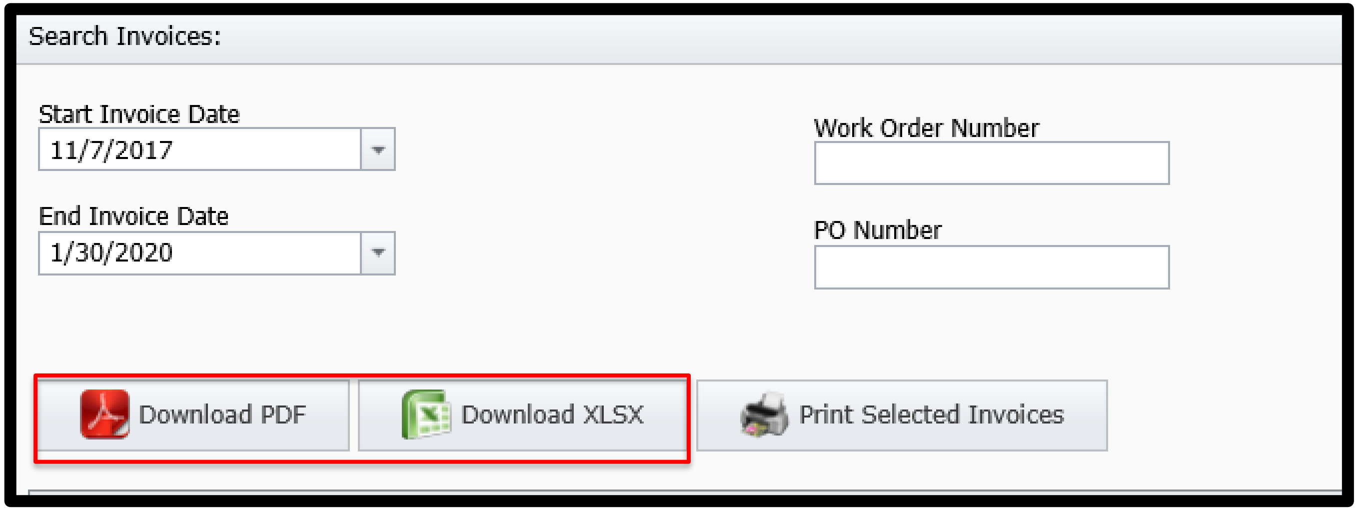
Invoices



It is important to modify your “Start Invoice Date” and “End Invoice Date” depending on the results you desire. Extending either date can show you older invoices or more recent (and even upcoming) invoices.

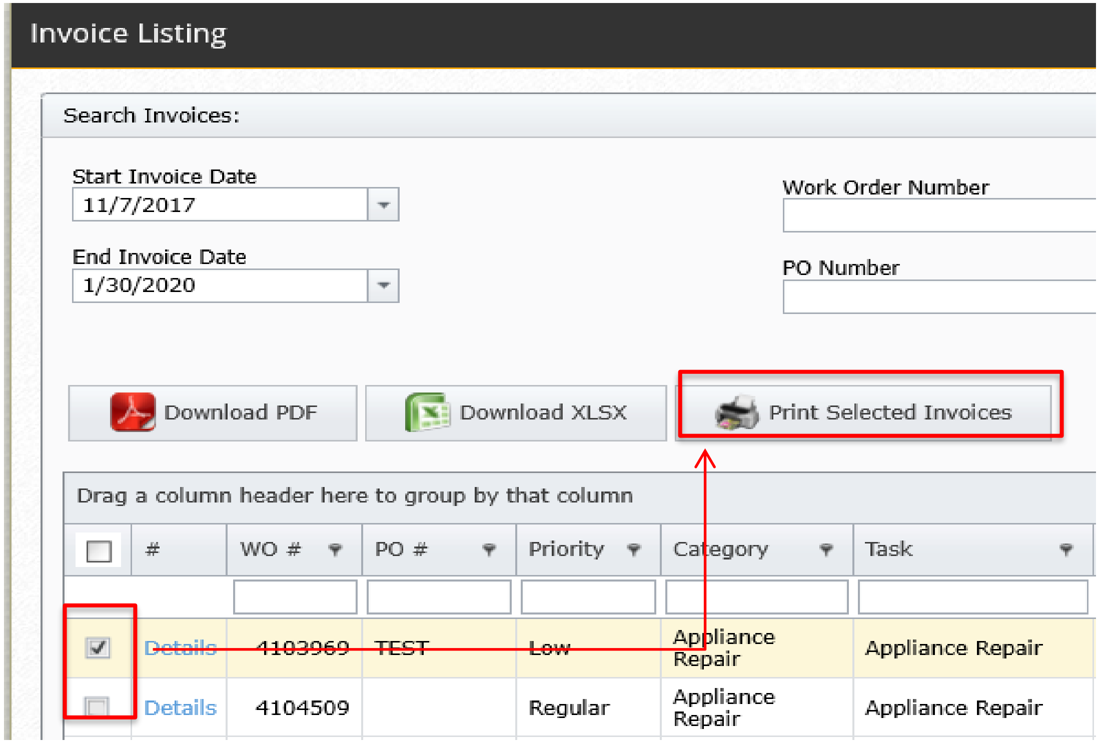
To search using any of the criteria you see above, just simply type in the criteria needed and then click Search.

Invoices



To export the Invoices list to Adobe PDF or Excel, click the icons you see at the top of the page.

Invoices



To see a copy of the invoice itself, you must "print" it. This feature, for security purposes, will actually send a printed version of the invoice to the email address associated with your username login.

Click the checkboxes associated with the invoices you wish to view, then click "Print Selected Invoices."

Locations

Locations:

Download PDF | Download XLSX | Locations with recurring services are in GREEN

Drag a column header here to group by that column

#	Company	Region	District	Loc #	Type	Address 1	Address 2	City	State	Zip	Phone	Open Date	EMS	Client Owne	Active
Details	Unapplied Account			-1		550 Crescent Blvd		GLOUCESTE CITY	NJ	08030			No	No	Yes
Details	Seth Rogan			0000000		420 White Owl Ave		LAKE CITY	CO	81235			No	No	No
Details	Gretchen Wieners			0000001		85 Toaster Strudel Lane		EVANSTON	IL	60202			No	No	No
Details	Blake Randof			0000003		123 Klap Ave		OCEAN SHORES	WA	98569			No	No	No
Details	Wayne Brady			0000004		35 washington way		LAKELAND	GA	31645			No	No	No
Details	Clifford the Big Red Dog			0000006		6541 Barn Drive		OAKLAND	CA	94613			No	No	No
Details	Conner Cook			0000008		15 California Ave		PEASTER	TX	76485			No	No	No
Details	Pork Qpine			0000009		13 Apple road		CEDAR RUN	NJ	08092			No	No	No
Details	PRSM Test Client	A	A	000001		1234 Philadelphia Ave	Suite 123	PHILADELPH	PA	19145	555-555-1234	4/17/2012	No	No	No
Details	Plankton			0000010		33 bucket lane		WALLKILL	NY	12589			No	No	No
Details	Guy			0000044		142 regular Ave		LAWNSIDE	NJ	08045			No	No	No

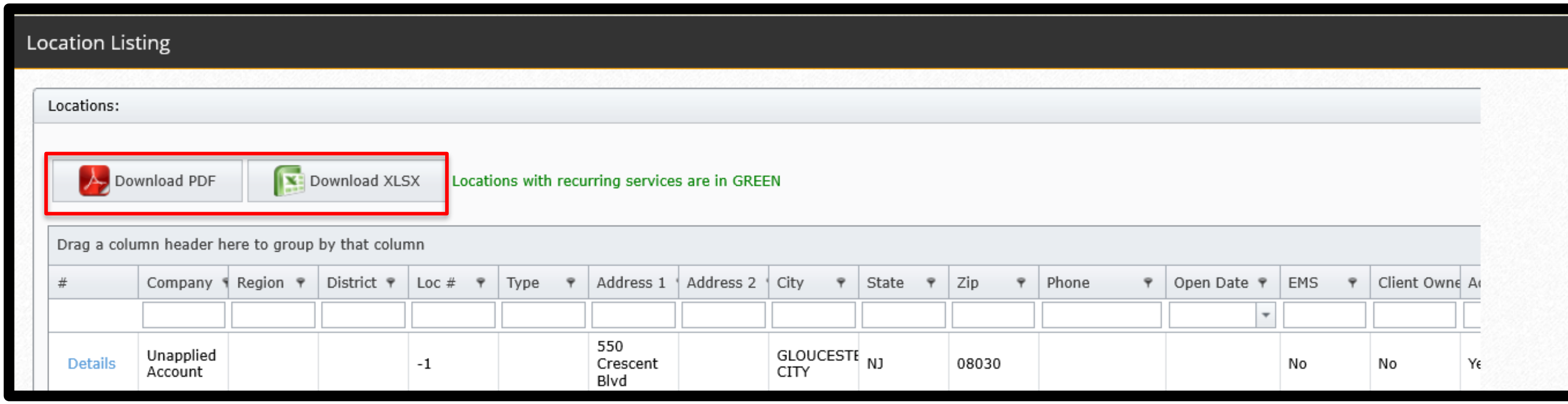
Page 1 of 4 (313 items) 1 2 3 4

Locations

The Locations tab will display all of your existing locations (on file with NEST).

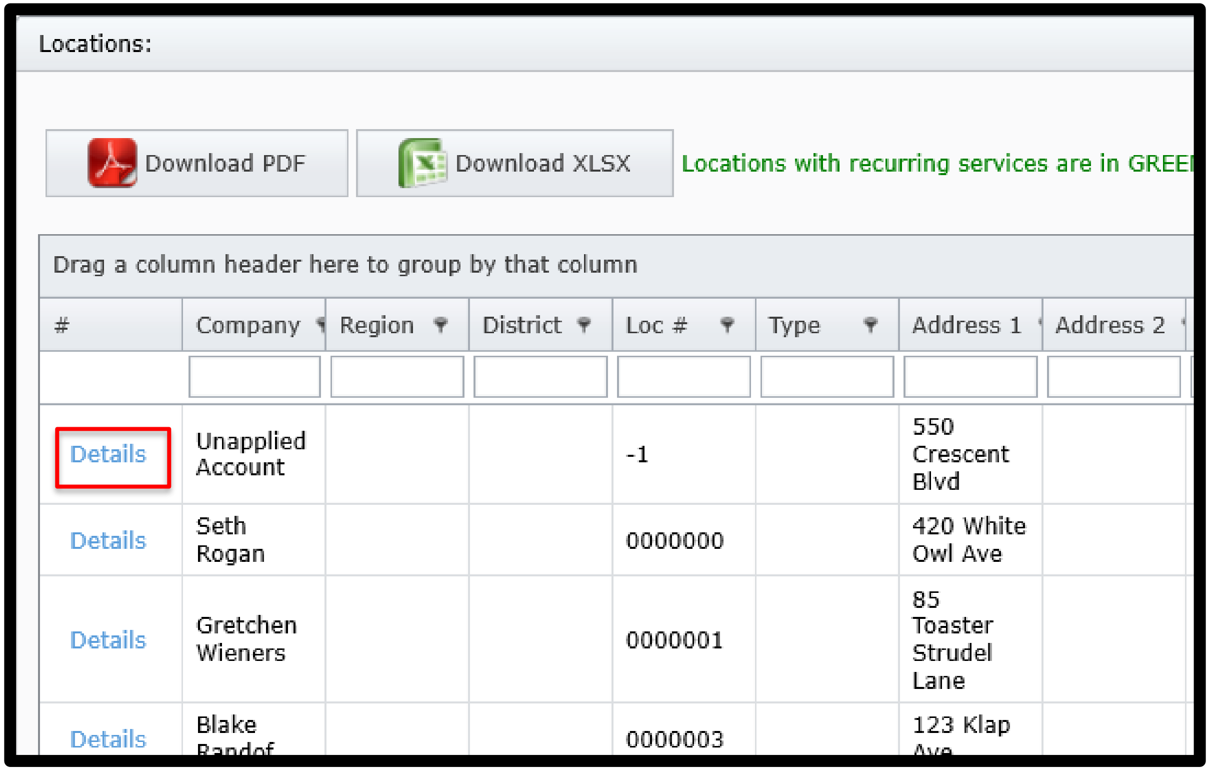
In this tab, you can export your list of stores to Adobe PDF or Excel. Like the other tabs of the Client Portal, you can filter and sort the columns of this tab too.

Locations



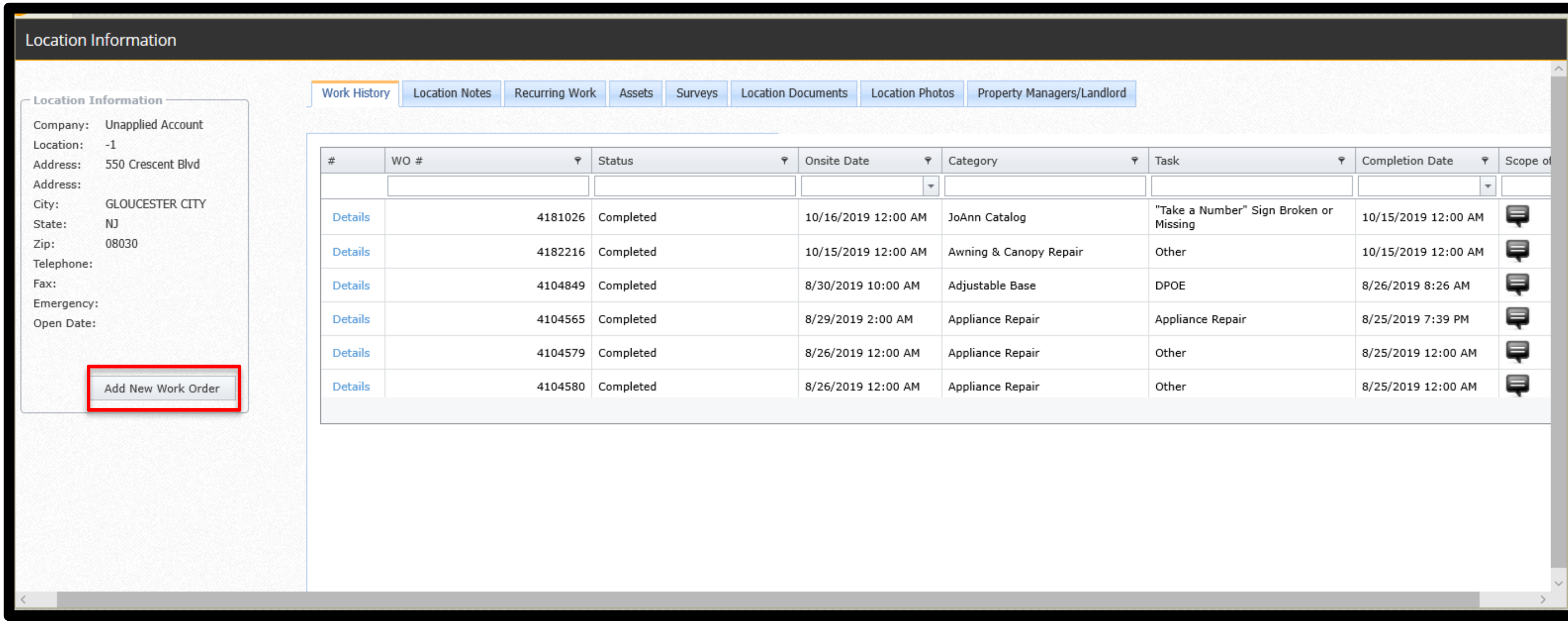
To export to Adobe PDF or Excel, click the icons at the top of the page.

Locations



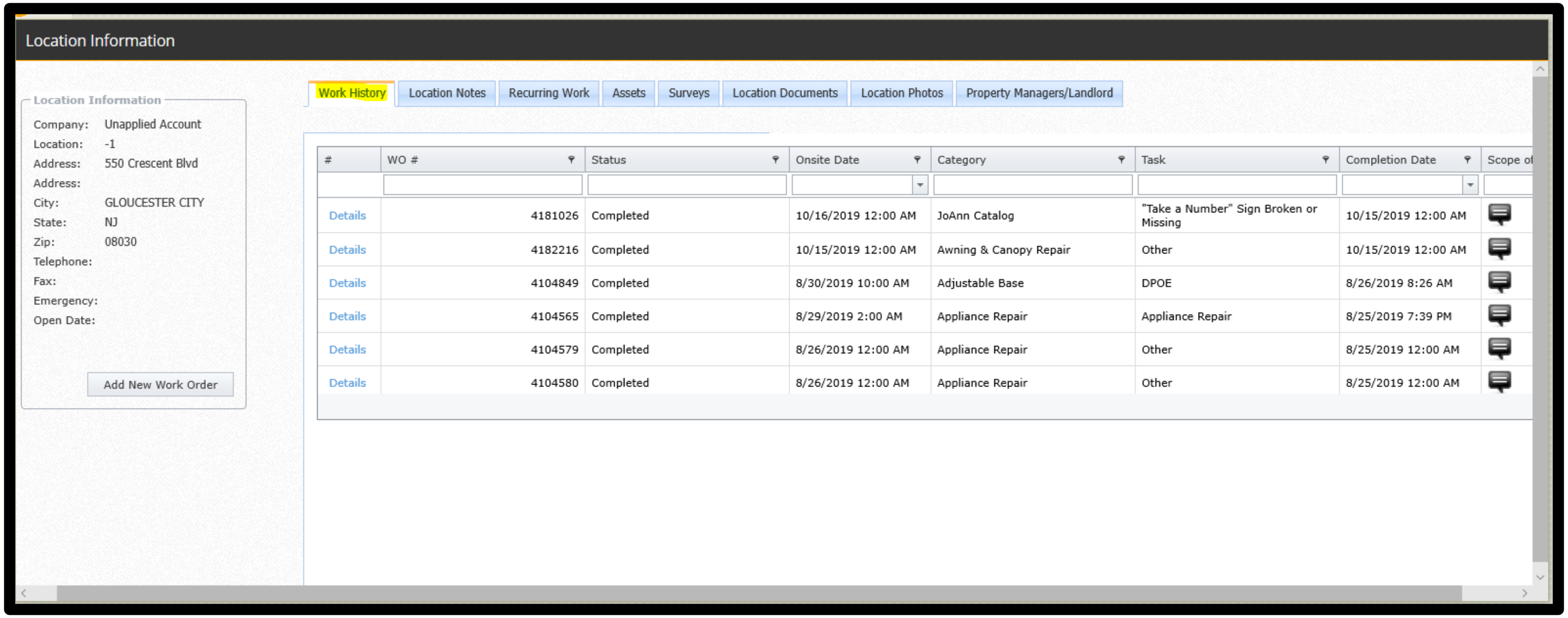
To view further details of a location, click the "Details" icon on the left.

Locations



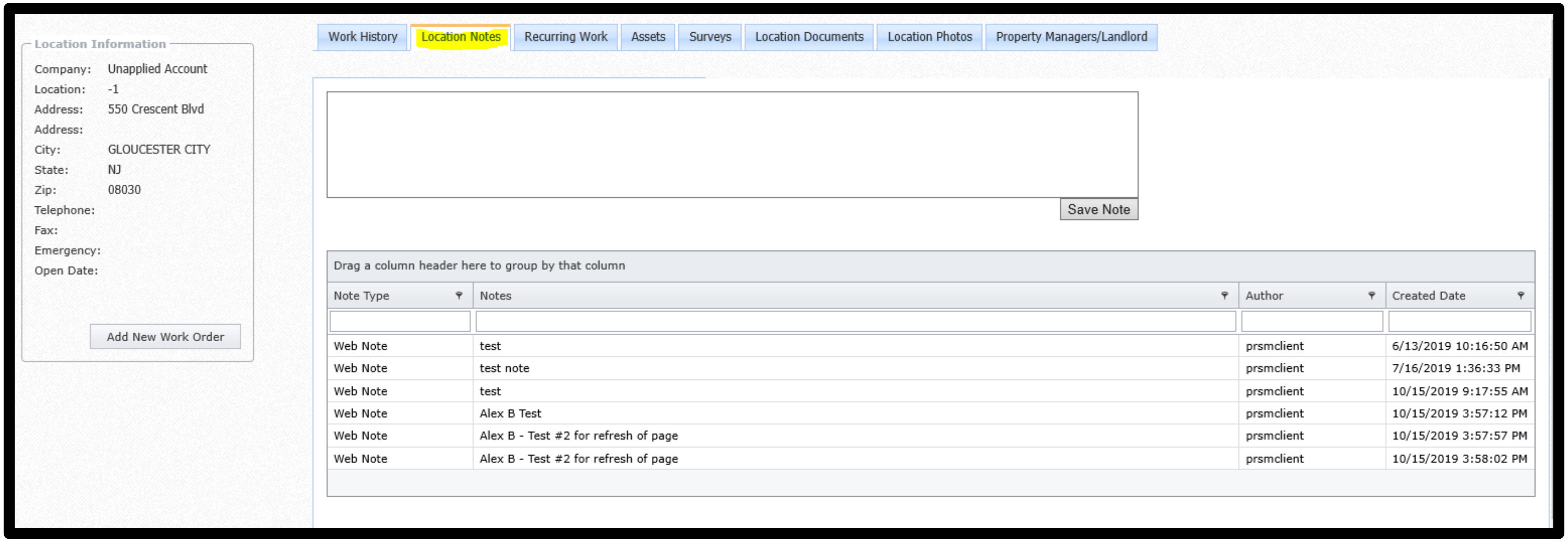
From the Location Information you can add a new work order by clicking “Add New Work Order”

Location Information: Work History



The Work History tab will show you all work order statuses for the location excluding canceled. The work orders shown in the list were created within the last two years. If you would like to see work orders older than two years you must use the WO List.

Location Information: Location Notes



The Location Notes tab shows all notes that are associated for this location. You can also enter a note by using the text box and clicking “Save Note”

Location Information: Recurring Work

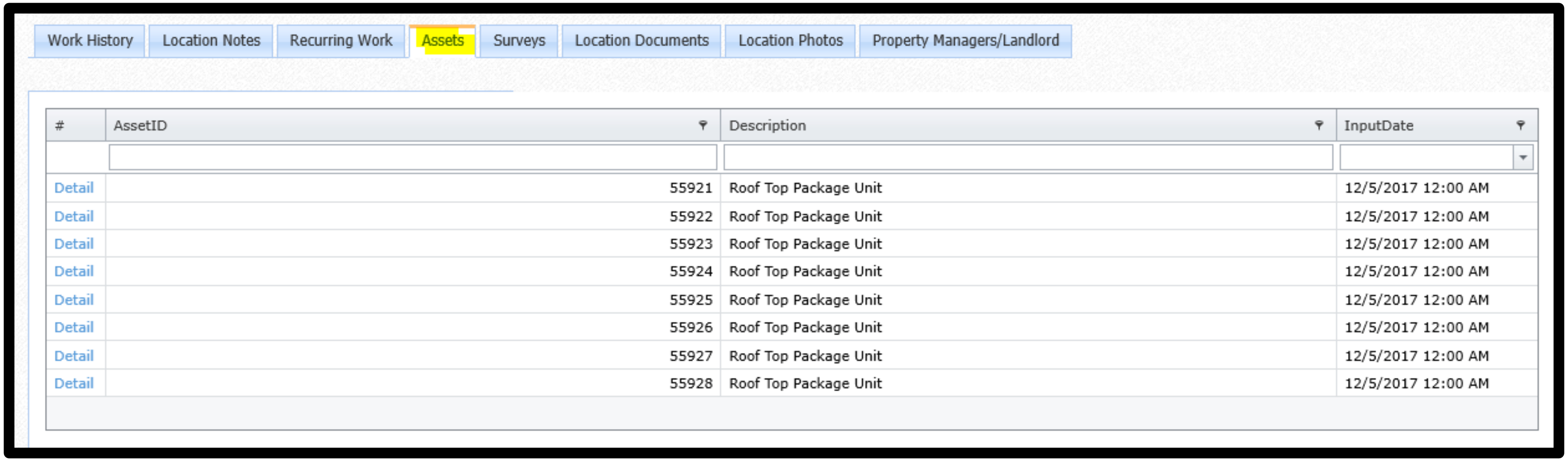
Work History | Location Notes | Recurring Work | Assets | Surveys | Location Documents | Location Photos | Property Managers/Landlord

Drag a column header here to group by that column

Recurring #	Category	Task	Freq	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
398098	Heating & Cooling	PM & Filter Change	4	0	1	0	0	1	0	0	1	0	0	1	0
401753	Window Cleaning	Window	4	0	1	0	0	1	0	0	1	0	0	1	0
402412	Floor Cleaning	Scrub Buff Sales Floor & Restroom Clean	24	3	1	2	2	1	2	3	2	1	2	2	3
404315	Floor Cleaning	Tile Strip/Refinish	1	0	1	0	0	0	0	0	0	0	0	0	0

The Recurring Work tab will show if this location is on a program and the frequency

Location Information: Assets



#	AssetID	Description	InputDate
Detail	55921	Roof Top Package Unit	12/5/2017 12:00 AM
Detail	55922	Roof Top Package Unit	12/5/2017 12:00 AM
Detail	55923	Roof Top Package Unit	12/5/2017 12:00 AM
Detail	55924	Roof Top Package Unit	12/5/2017 12:00 AM
Detail	55925	Roof Top Package Unit	12/5/2017 12:00 AM
Detail	55926	Roof Top Package Unit	12/5/2017 12:00 AM
Detail	55927	Roof Top Package Unit	12/5/2017 12:00 AM
Detail	55928	Roof Top Package Unit	12/5/2017 12:00 AM

The Assets tab will show all assets that are associated to this location

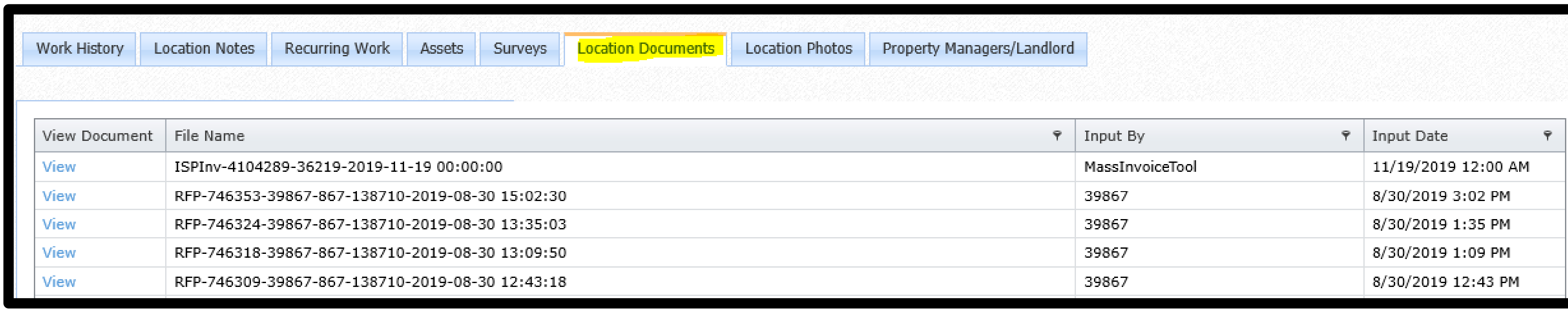
Location Information: Surveys

Work History | Location Notes | Recurring Work | Assets | Surveys | Location Documents | Location Photos | Property Managers/Landlord

#	SurveyID	Description	Status	InputDate	StartDate	EndDate
Detail	46835	General QA Survey	Completed	11/25/2019 12:48 PM	11/25/2019 12:00 AM	11/25/2019 12:00 AM
Detail	42227	General Windows	Completed	1/21/2019 11:58 PM	1/21/2019 12:00 AM	1/21/2019 12:00 AM
Detail	41887	General Survey	Completed	1/7/2019 2:10 PM	1/7/2019 12:00 AM	1/7/2019 12:00 AM

The Surveys tab will show all Surveys that are associated to this location

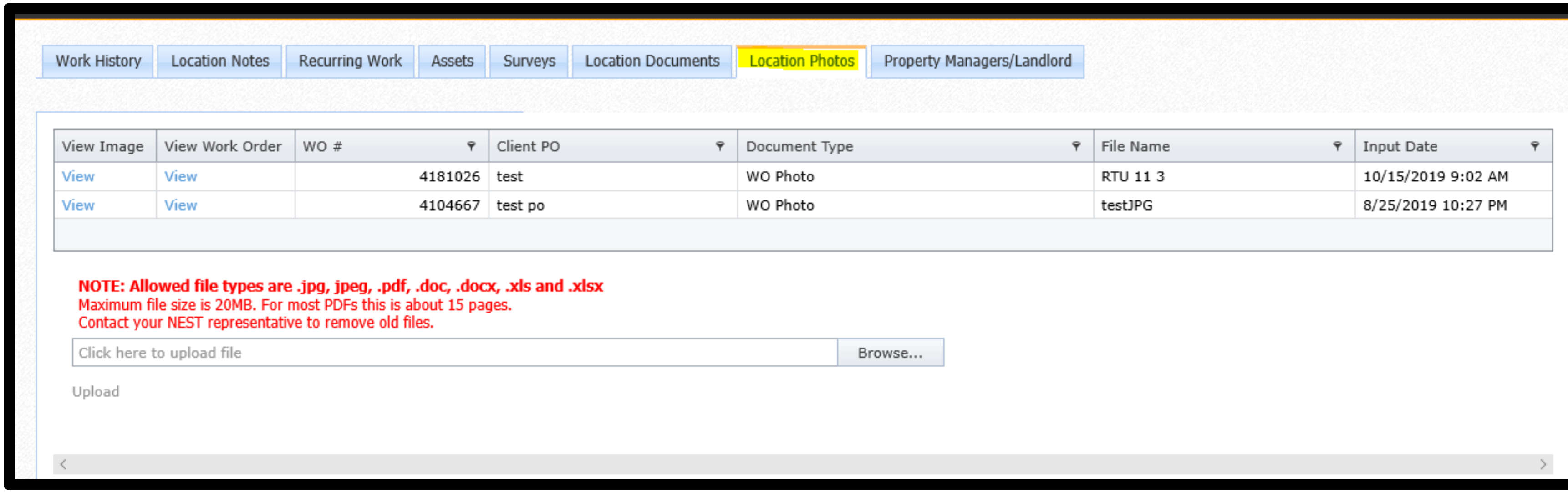
Location Information: Location Documents



View Document	File Name	Input By	Input Date
View	ISPInv-4104289-36219-2019-11-19 00:00:00	MassInvoiceTool	11/19/2019 12:00 AM
View	RFP-746353-39867-867-138710-2019-08-30 15:02:30	39867	8/30/2019 3:02 PM
View	RFP-746324-39867-867-138710-2019-08-30 13:35:03	39867	8/30/2019 1:35 PM
View	RFP-746318-39867-867-138710-2019-08-30 13:09:50	39867	8/30/2019 1:09 PM
View	RFP-746309-39867-867-138710-2019-08-30 12:43:18	39867	8/30/2019 12:43 PM

The Location Documents tab will show all documents that are associated with this location

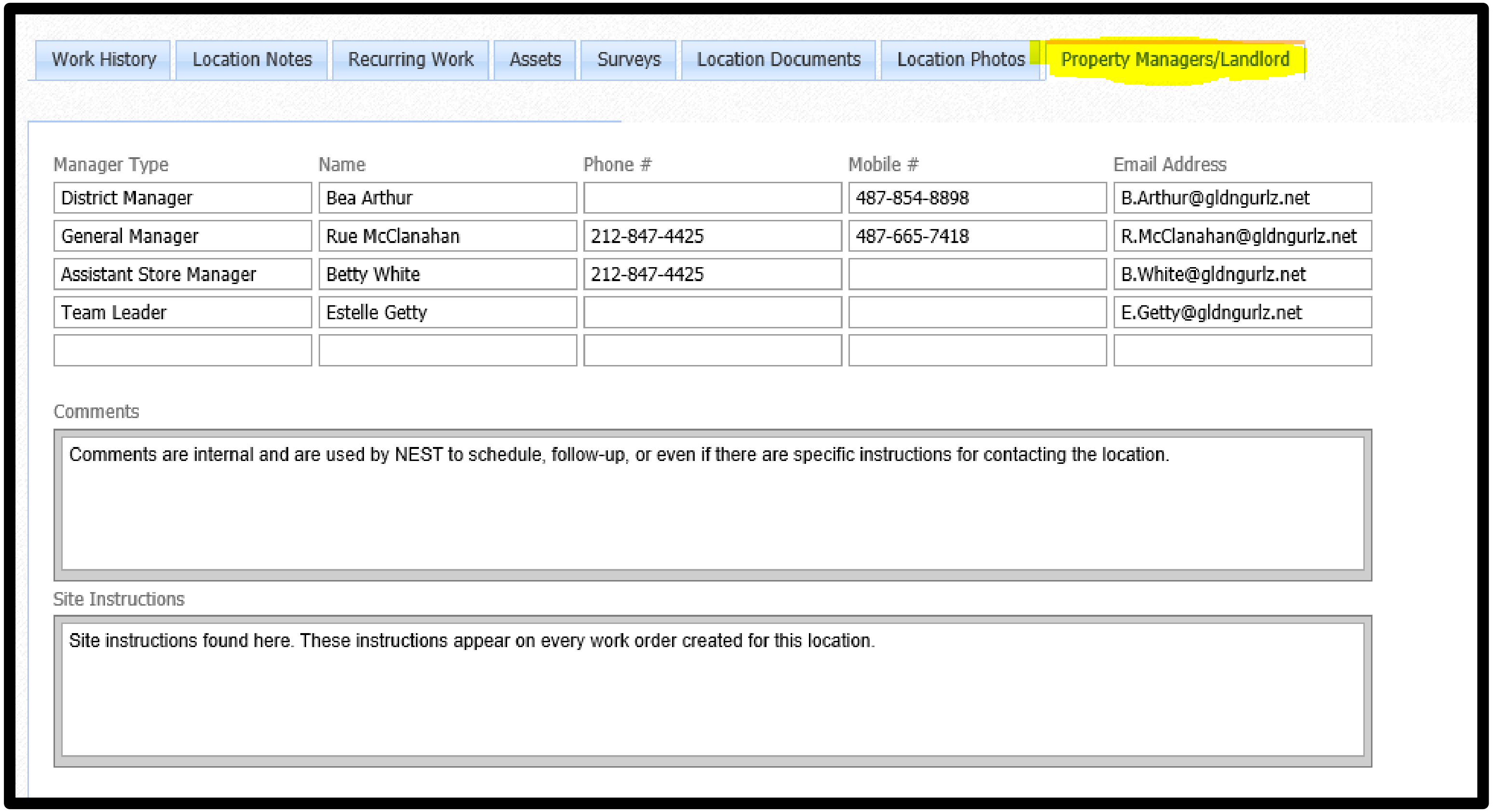
Location Information: Location Photos



View Image	View Work Order	WO #	Client PO	Document Type	File Name	Input Date
View	View	4181026	test	WO Photo	RTU 11 3	10/15/2019 9:02 AM
View	View	4104667	test po	WO Photo	testJPG	8/25/2019 10:27 PM

The Location Photos tab will show all photos for this location. You can upload photos from this tab by clicking “Browse” and selecting the item you wish to open then click “upload”

Location Information: Property Managers/Landlord



The Property Managers/Landlord tab shows Property Managers/Landlords for this location and their contact information

Surveys

Surveys

Survey Listing:

Location Number

Survey Description

Enter all or part of the survey description.

Search

Clear

Download PDF | Download XLSX | Print Selected Surveys

Drag a column header here to group by that column

	#	Survey ID	Company	Loc #	City	State	Start Date
	Detail	47003	Unapplied Account	-1	GLOUCESTER CITY	NJ	12/19/2019
	Detail	46791	PRSM Test Client	88	GLOUCESTER CITY	NJ	11/20/2019
	Detail	46790	PRSM Test Client	88	GLOUCESTER CITY	NJ	11/20/2019
	Detail	46235	PRSM Test Client	88	GLOUCESTER CITY	NJ	10/09/2019
	Detail	46081	PRSM Test Client	88	GLOUCESTER CITY	NJ	10/01/2019

Page 1 of 3 (286 items) 1 2 3

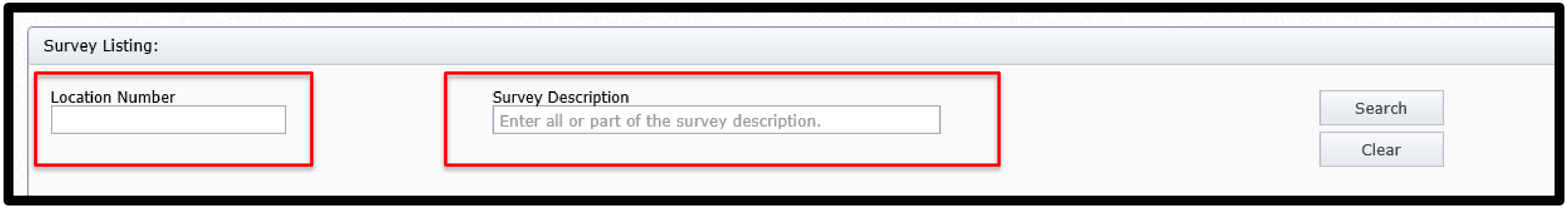
Surveys

The Surveys tab is designed to display any existing surveys for your locations. The NEST Quality Assurance team frequently visits locations to perform surveys.

These surveys are then reviewed by our NEST users and displayed on the portal for our clients.

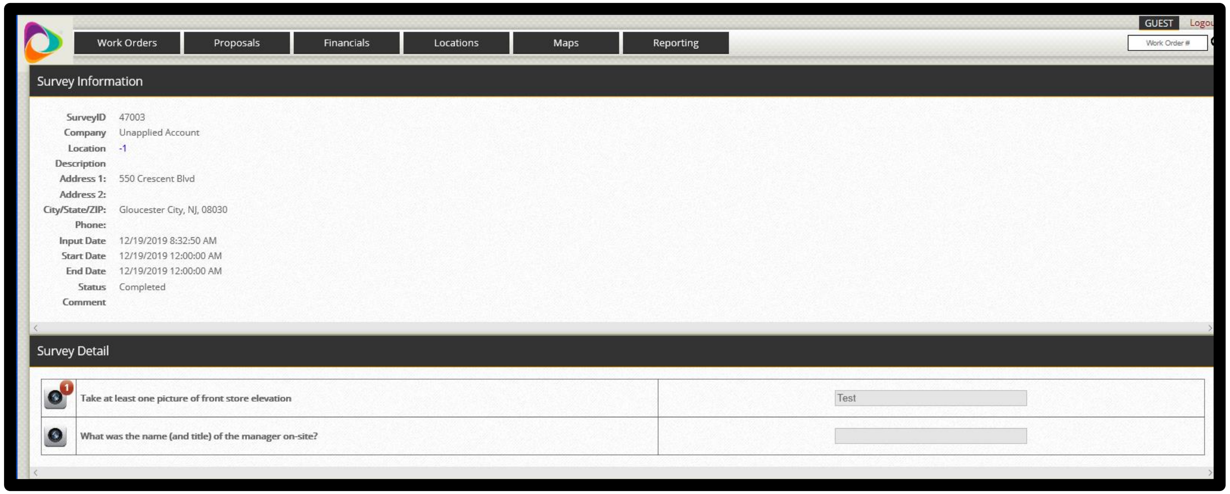
Surveys can be viewed within the website or emailed directly to you in a PDF format. You can export the list of surveys to Adobe PDF or Excel, as well as filter and sort through the list.

Surveys



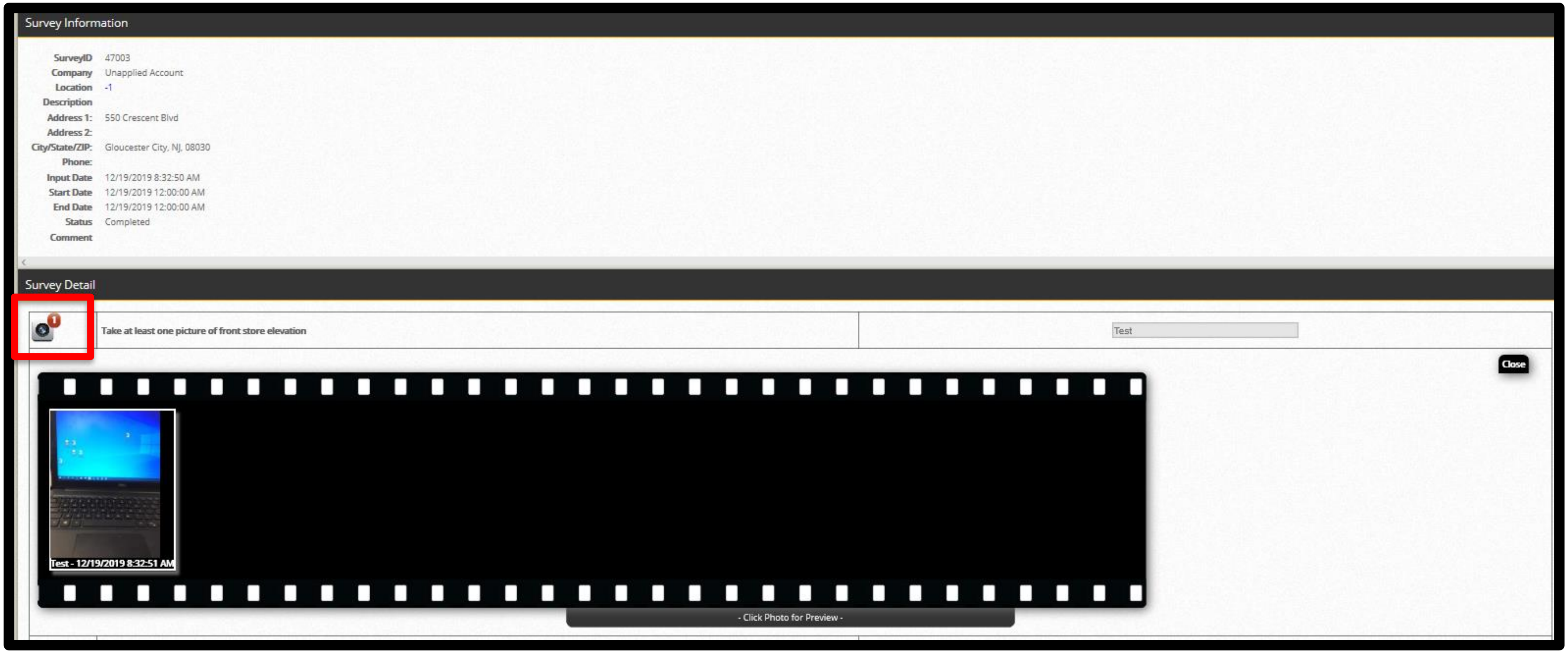
You can search for Surveys by Location or Survey Type. Use the fields at the top of the page, then click “Search”

Surveys



To view a copy of the survey within the website, click the “Detail” icon.

Surveys

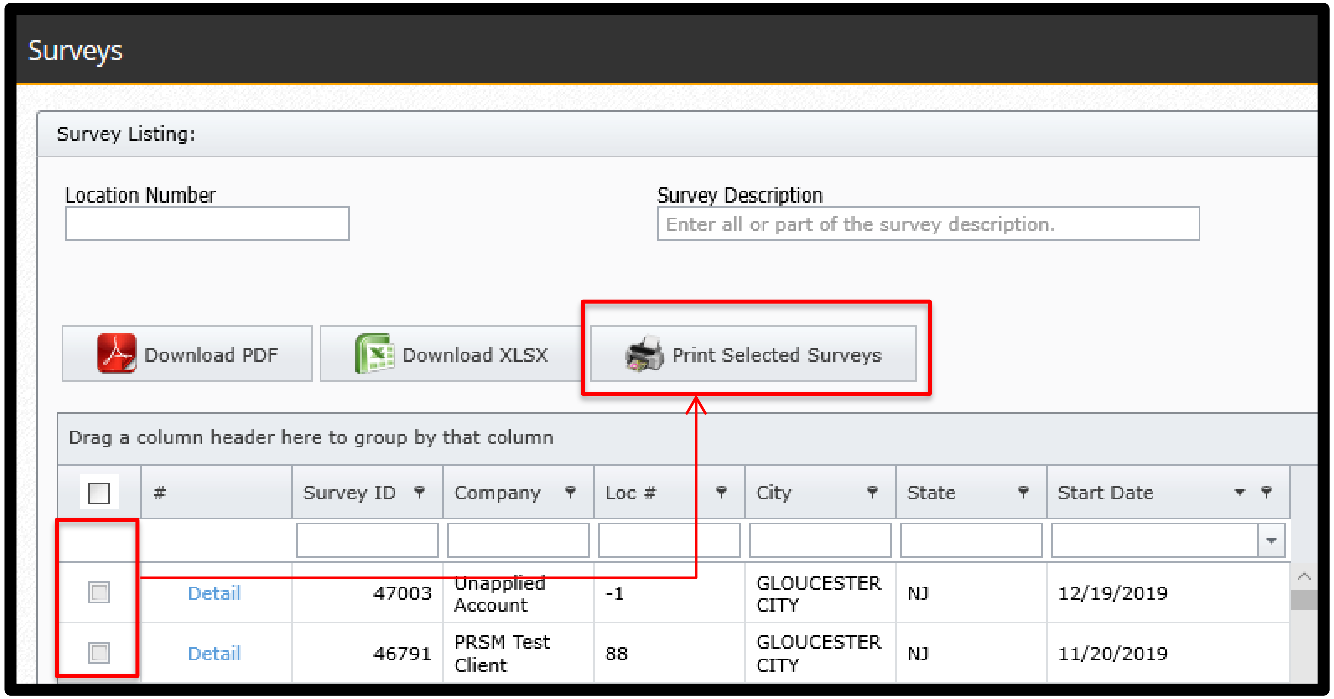


In addition to viewing the questions and survey responses, you can also view the pictures taken by our QA representatives.

Click the camera icon to the left; if there is a red circled number on the icon, there are pictures to view.

NEST Multi-Facility Management

Surveys

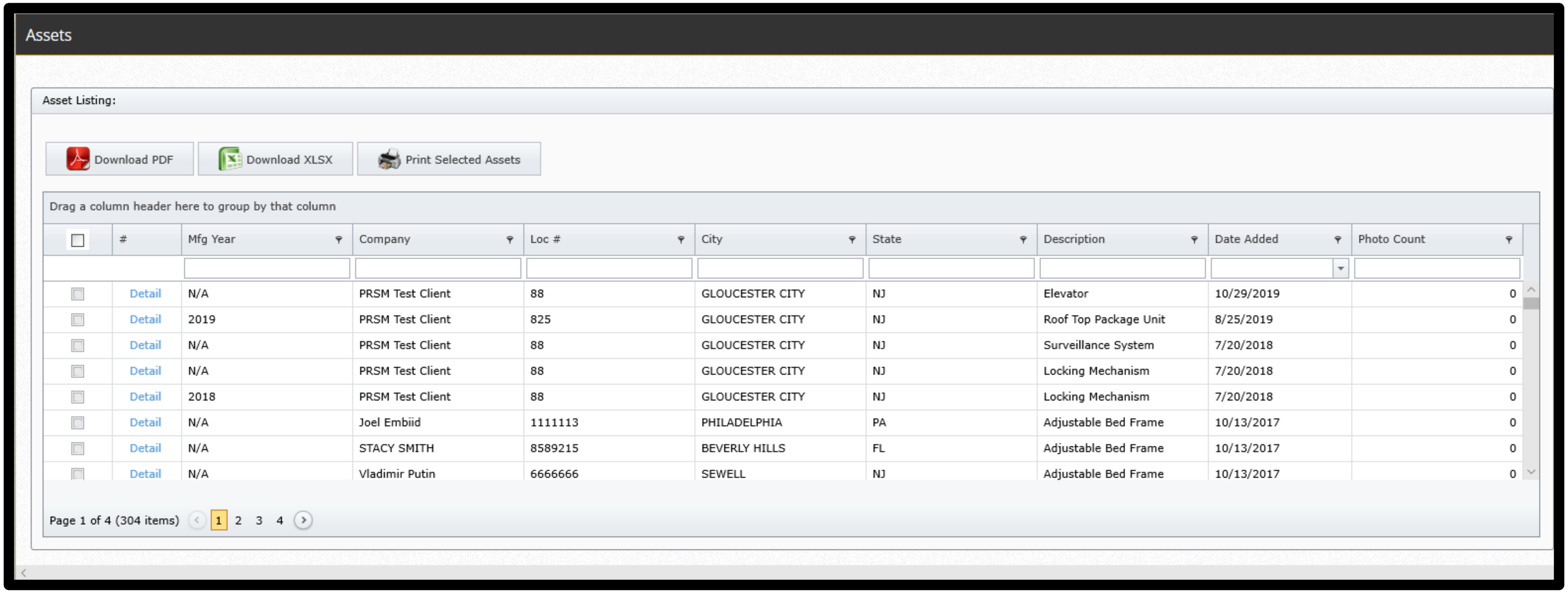


To send Surveys to your email in PDF format, click the checkboxes to left of the surveys of your choice.

Then click “Print Selected Surveys.”

Photos will appear in the survey report.

Assets



Assets

Asset Listing:

Download PDF | Download XLSX | Print Selected Assets

Drag a column header here to group by that column

	#	Mfg Year	Company	Loc #	City	State	Description	Date Added	Photo Count
	Detail	N/A	PRSM Test Client	88	GLOUCESTER CITY	NJ	Elevator	10/29/2019	0
	Detail	2019	PRSM Test Client	825	GLOUCESTER CITY	NJ	Roof Top Package Unit	8/25/2019	0
	Detail	N/A	PRSM Test Client	88	GLOUCESTER CITY	NJ	Surveillance System	7/20/2018	0
	Detail	N/A	PRSM Test Client	88	GLOUCESTER CITY	NJ	Locking Mechanism	7/20/2018	0
	Detail	2018	PRSM Test Client	88	GLOUCESTER CITY	NJ	Locking Mechanism	7/20/2018	0
	Detail	N/A	Joel Embiid	1111113	PHILADELPHIA	PA	Adjustable Bed Frame	10/13/2017	0
	Detail	N/A	STACY SMITH	8589215	BEVERLY HILLS	FL	Adjustable Bed Frame	10/13/2017	0
	Detail	N/A	Vladimir Putin	6666666	SEWELL	NJ	Adjustable Bed Frame	10/13/2017	0

Page 1 of 4 (304 items) 1 2 3 4

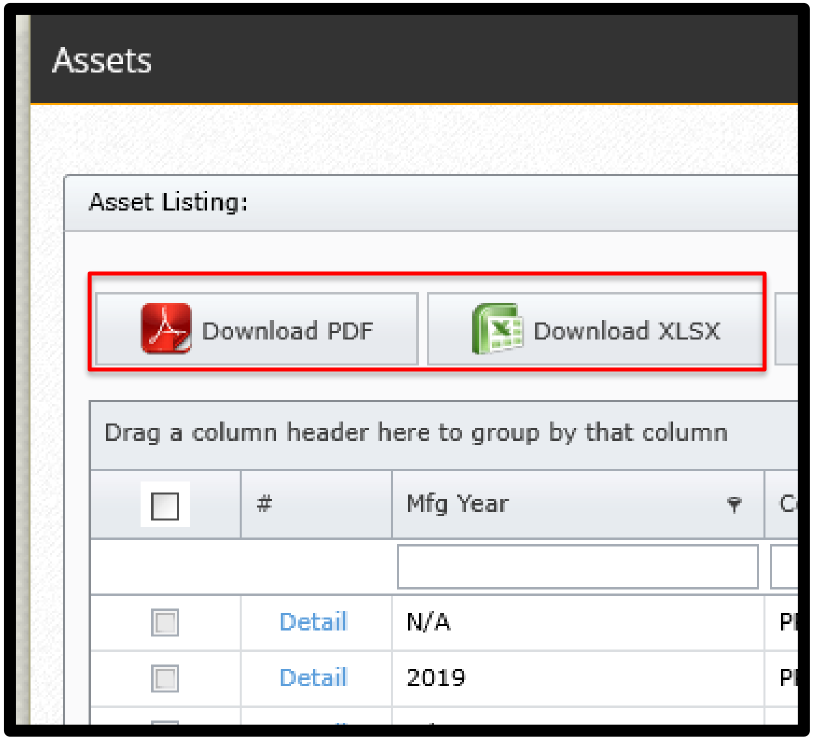
Assets

The Assets tab is designed to track and display your locations' assets. Assets usually refer to equipment found at your stores. For example, Heating & Cooling units, Backflow devices, or Hot Water Heaters.

These assets and their details (make, model, serial, etc.) are captured by our service technicians, reviewed by our NEST users, and displayed on the portal for our clients.

Assets can be viewed within the website or emailed directly to you in a PDF format. You can export the list of assets to Adobe PDF or Excel, as well as filter and sort through the list.

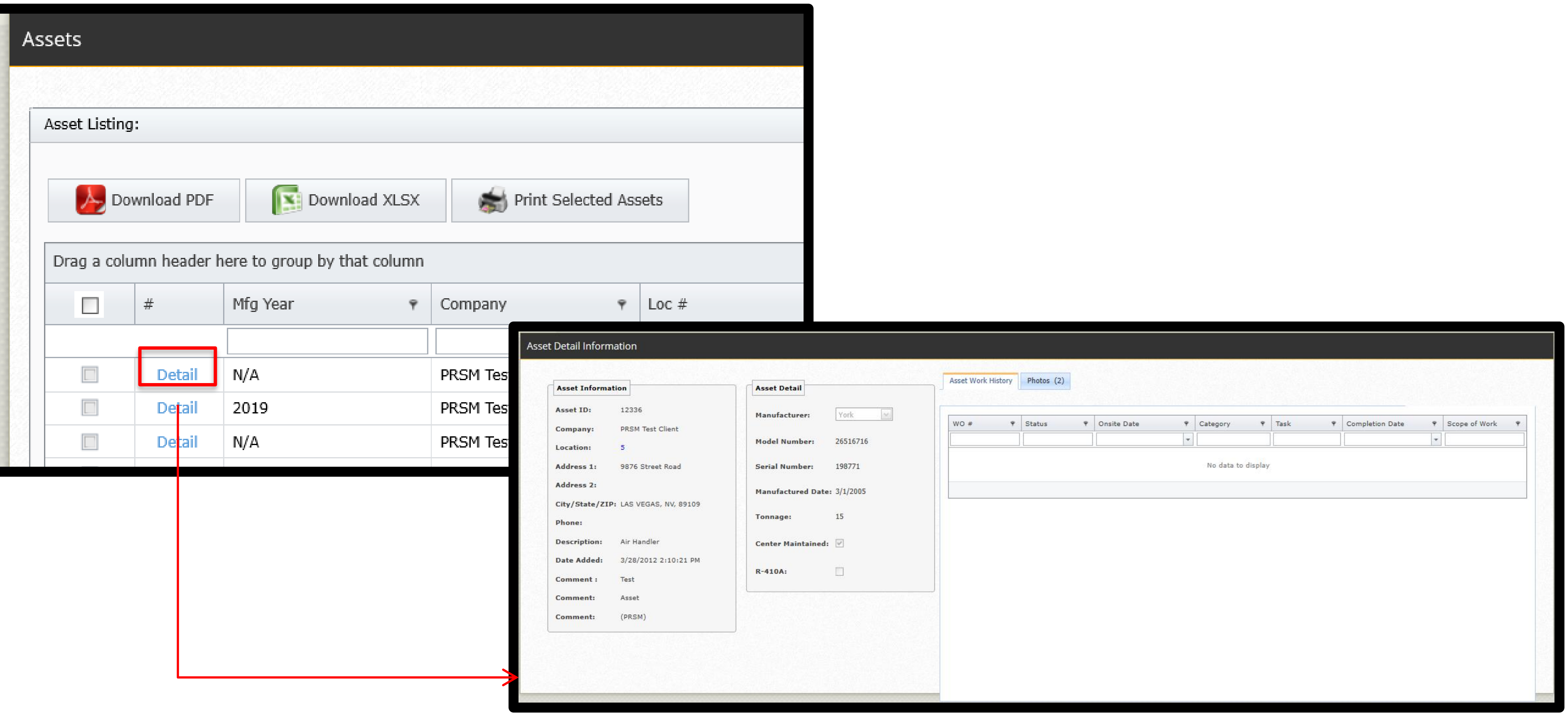
Assets



To export to Adobe PDF or Excel, click the icons at the top of the page.

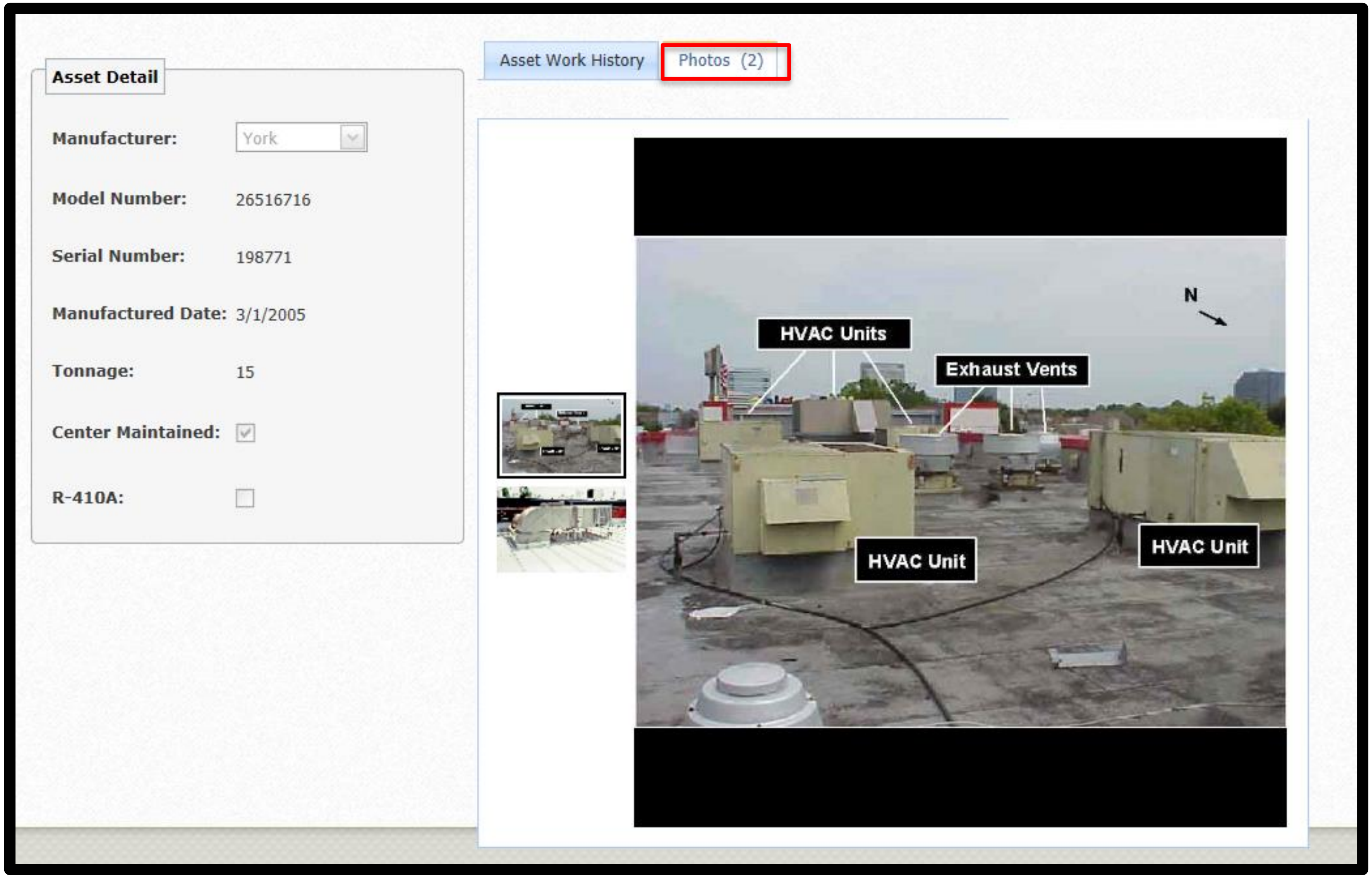
Note: This will only export the list of assets, not the asset details.

Assets



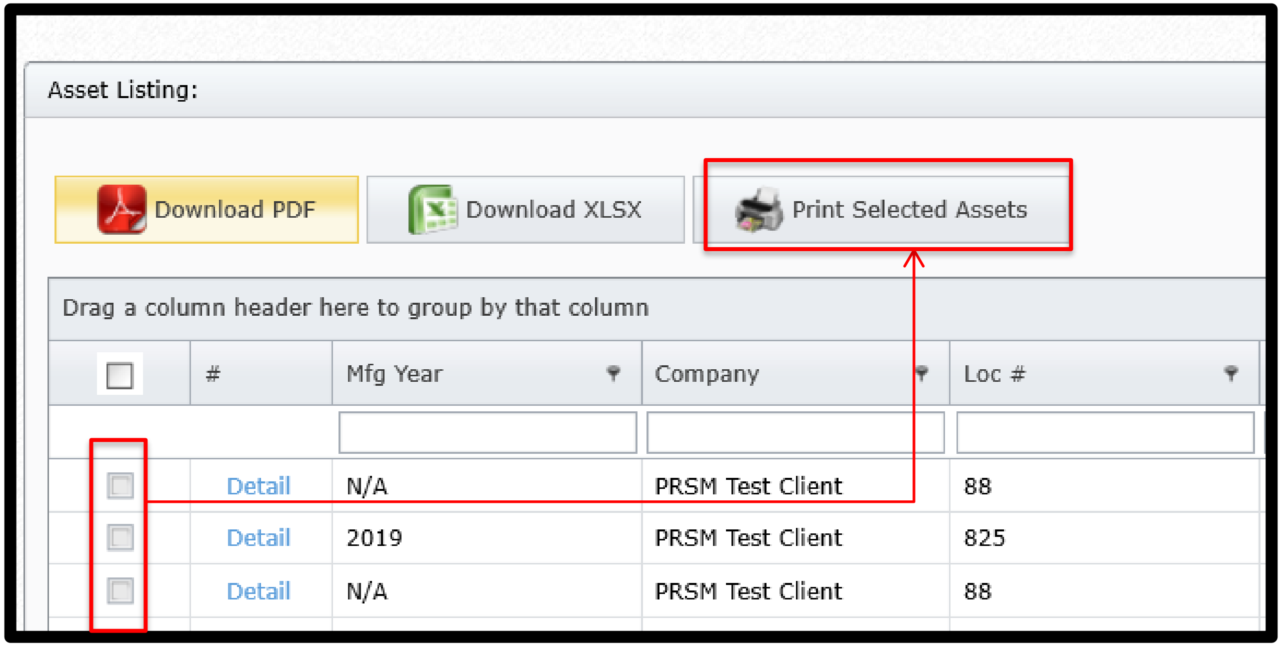
To view a copy of the asset within the website, click the "Detail" icon.

Assets



To view the photos associated with an asset, click the Photos tab.

Assets

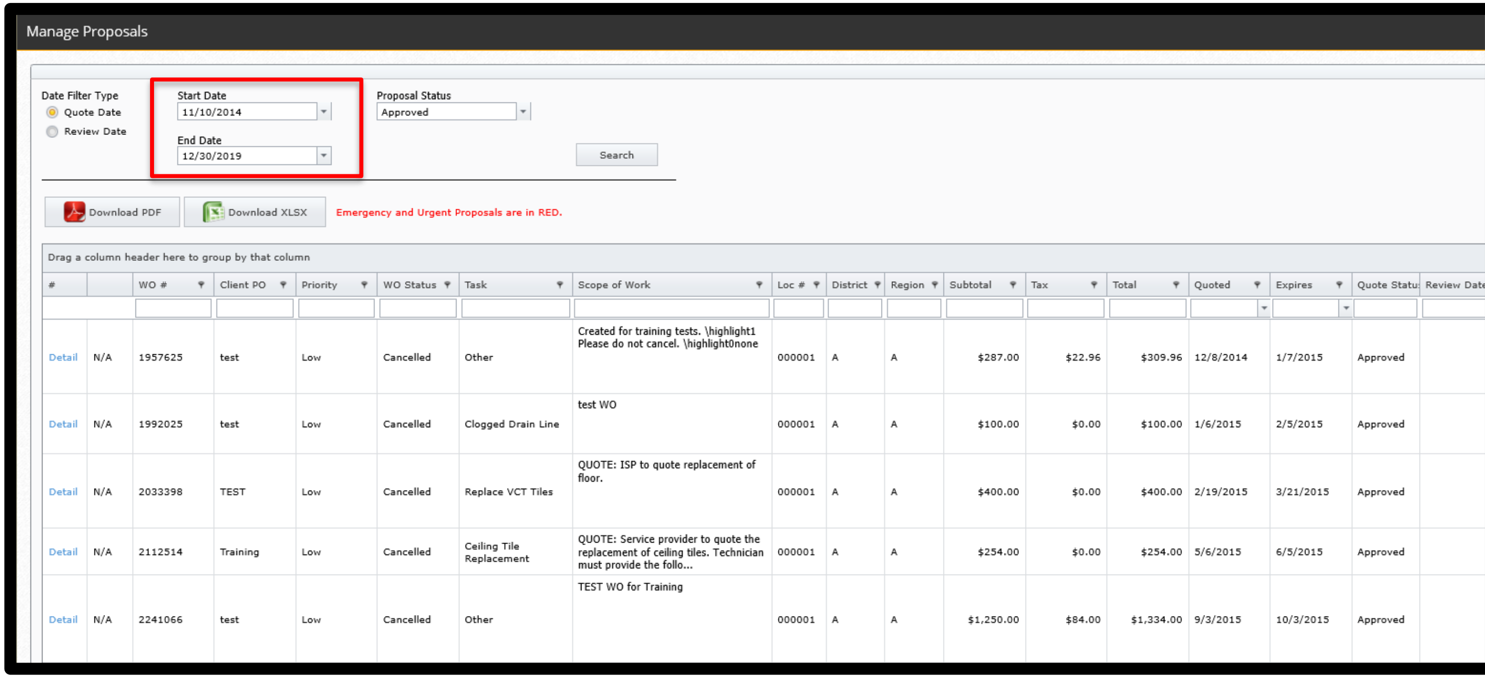


To send Assets to your email in PDF format, click the checkboxes to left of the assets of your choice.

Then click "Print Selected Assets."

The asset photos will be included.

Proposals



You can extend the date range by clicking the “Start Date” drop down and extending the date back for past work orders, or by clicking the “End Date” drop down and extending the date forward for future work orders.

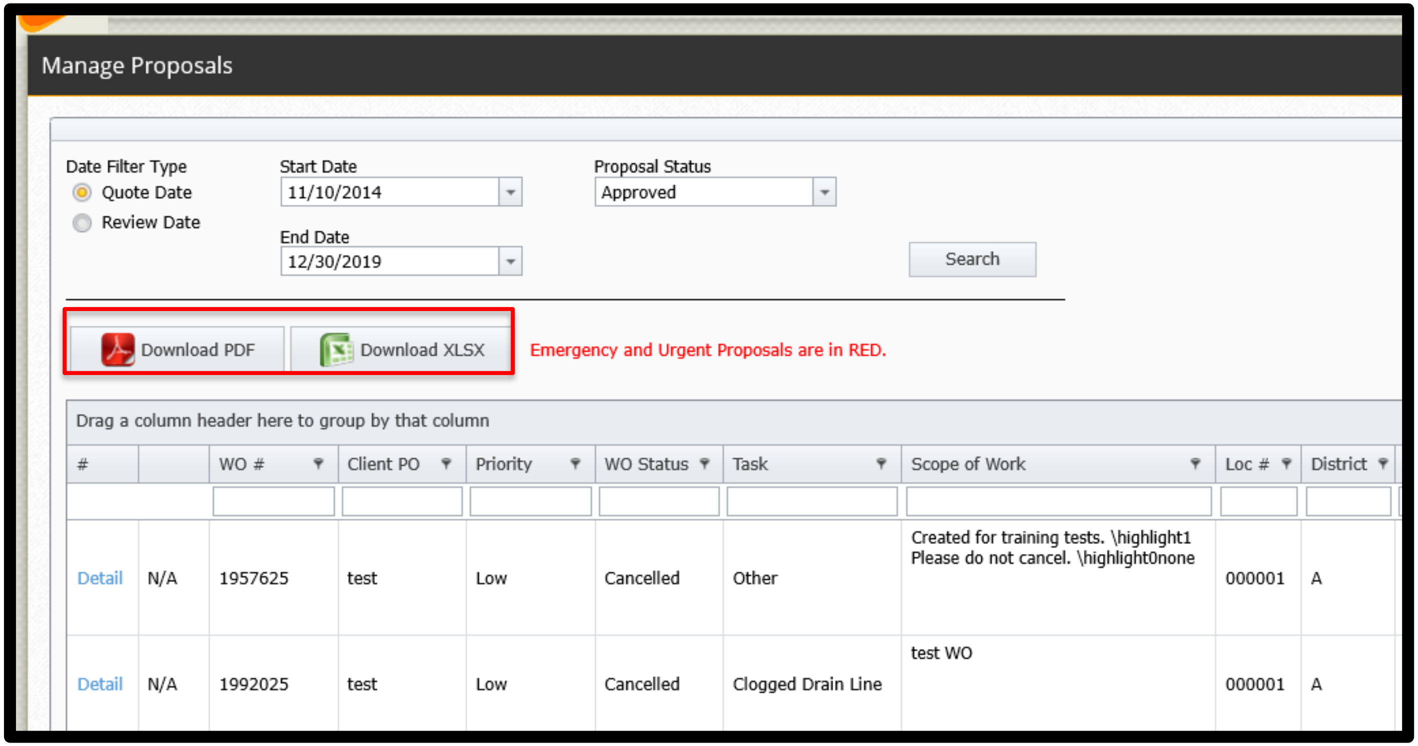
Proposals

The Proposals tab will display all services that need client approval. This tab will also display previously approved and declined proposals.

Clients can Approve or Decline proposals right from the portal.

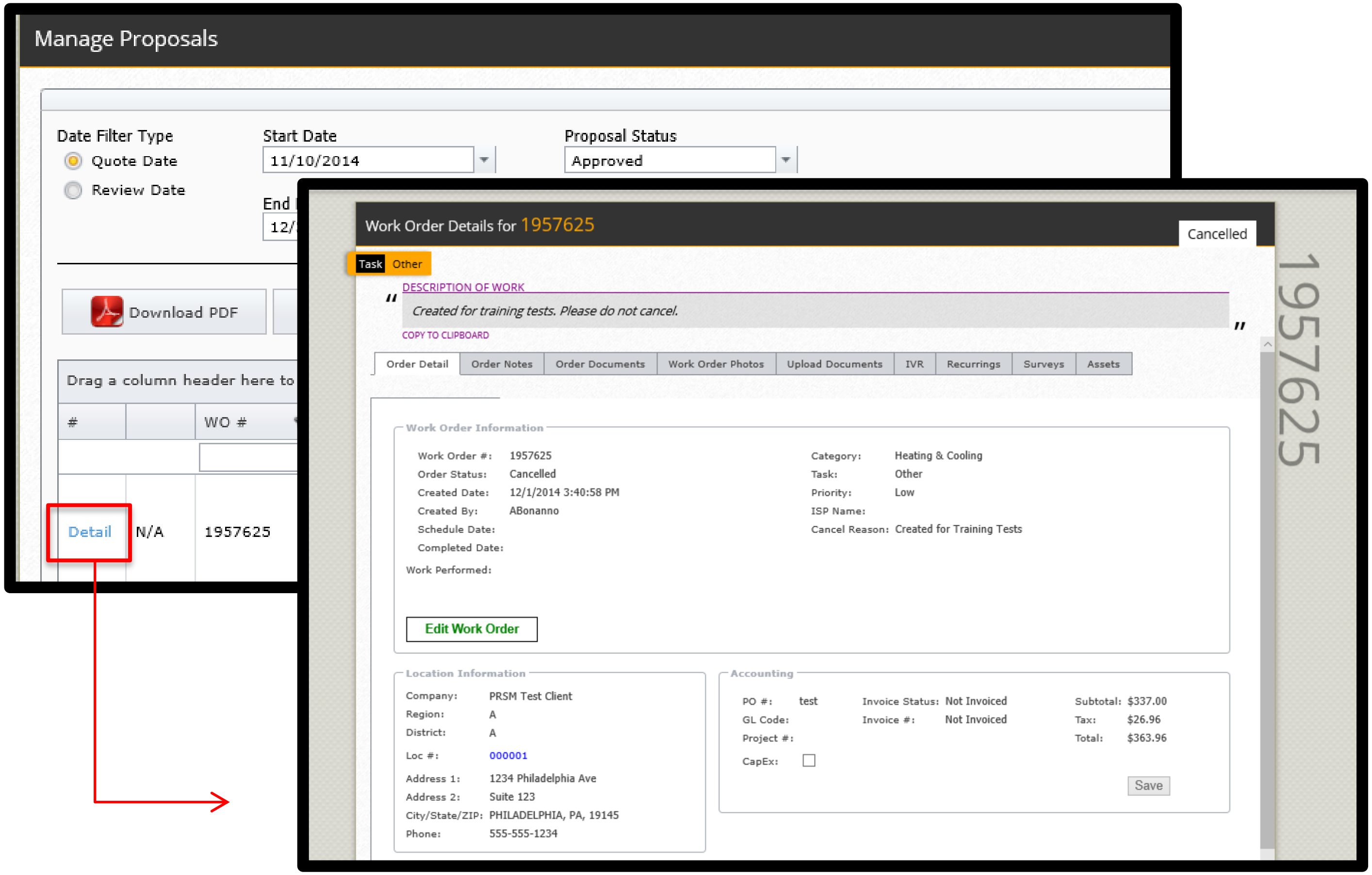
The list itself can be exported to Adobe PDF or Excel for further review.

Proposals



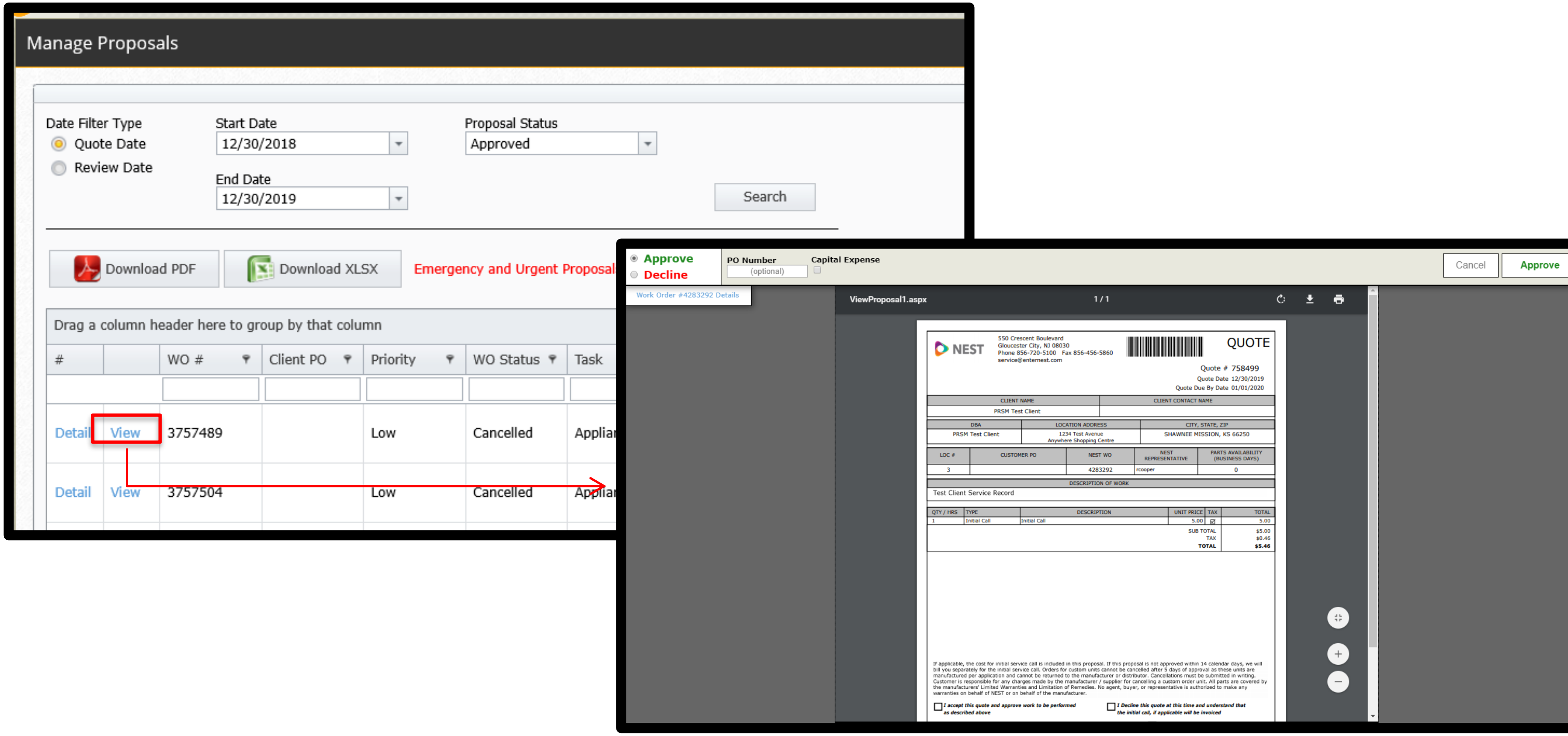
To export to Adobe PDF or Excel, click the icons at the top of the page.

Proposals



To view the details of the work order associated with this quote, click the “detail” icon.

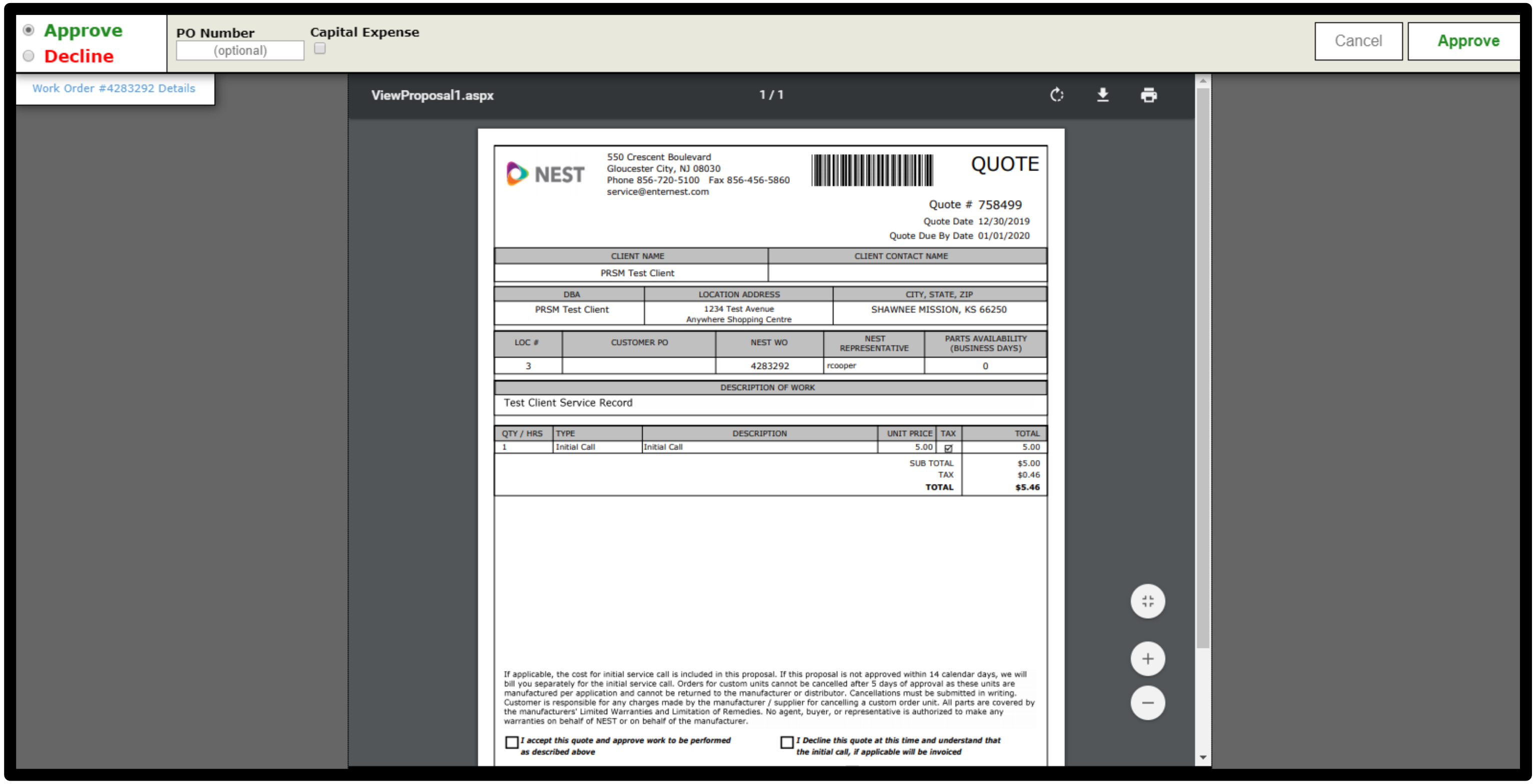
Proposals



To view the quote, click the "View" icon. Clicking view will also allow you to approve or decline the proposal.

- Proposals
  - Details of the work order details hyperlink. It will open and new window to get to the work order details and still keep open the proposals tab

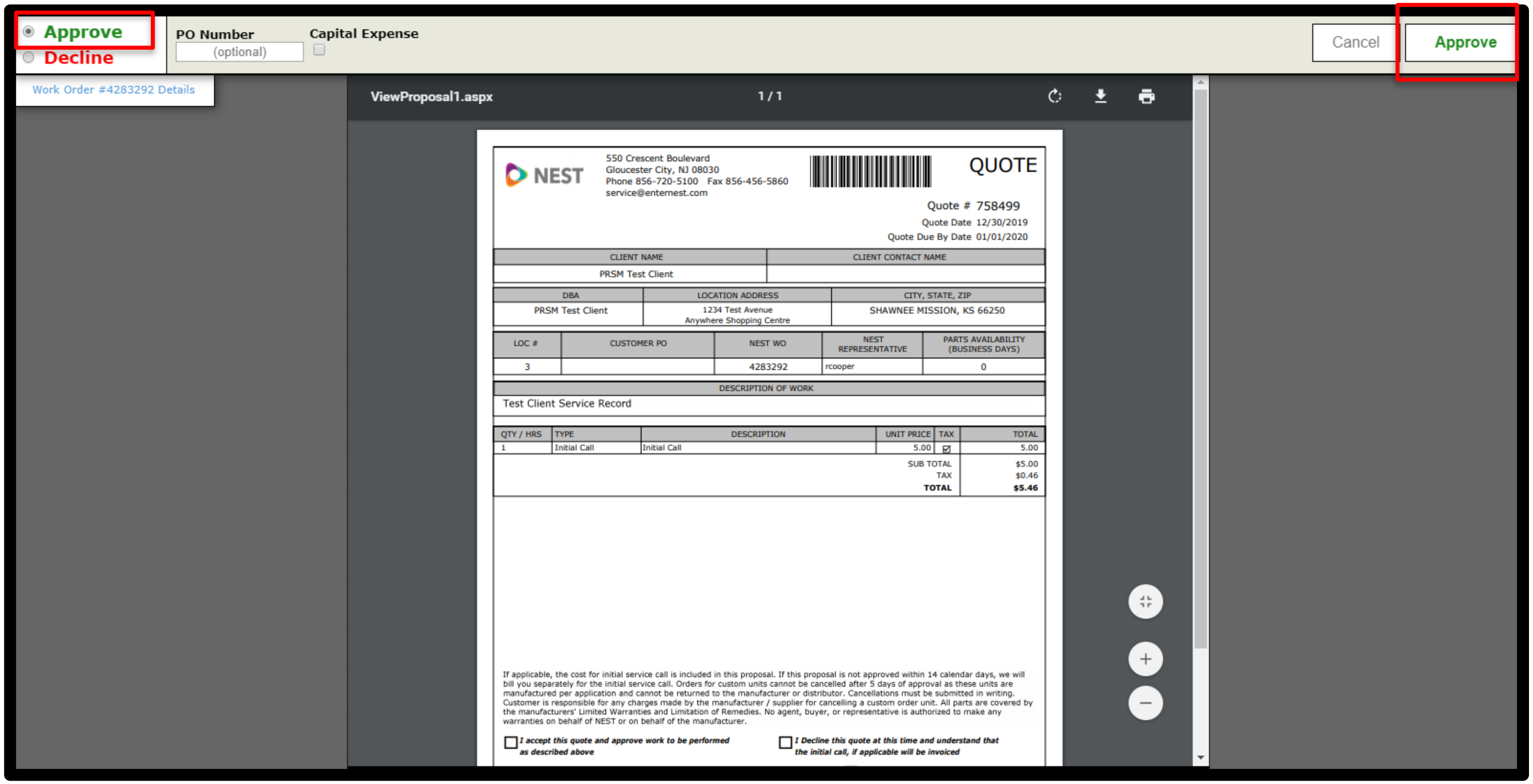
Proposals



Viewing the details of the quote allows you to Approve or Decline the proposal.

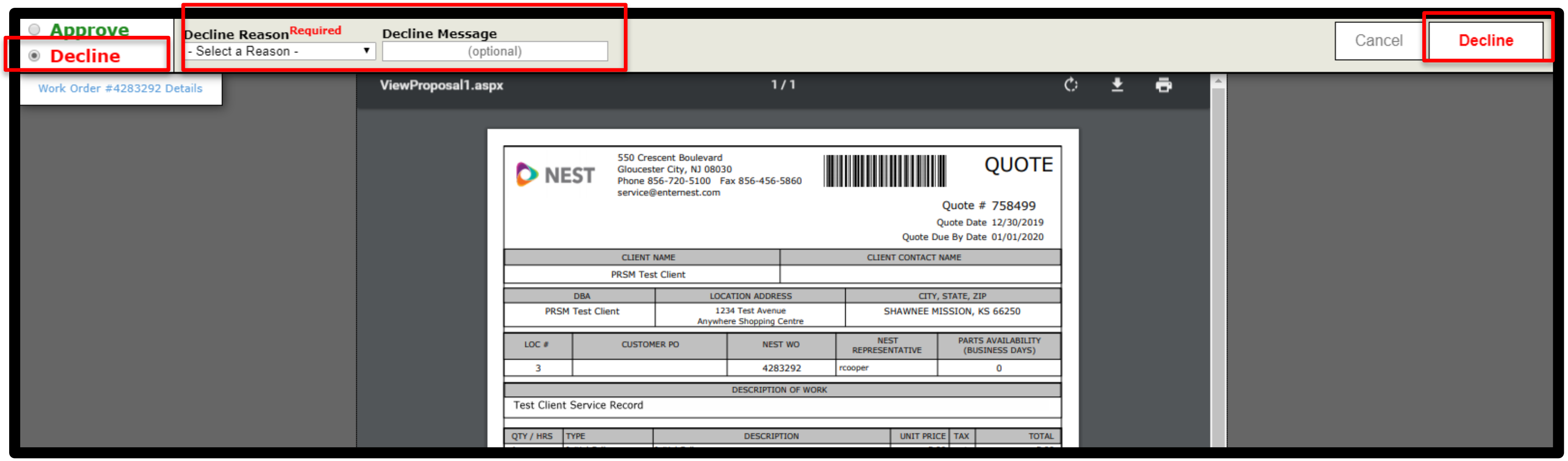
An alert is sent immediately to NEST when a quote is Approved or Declined by a client

Proposals



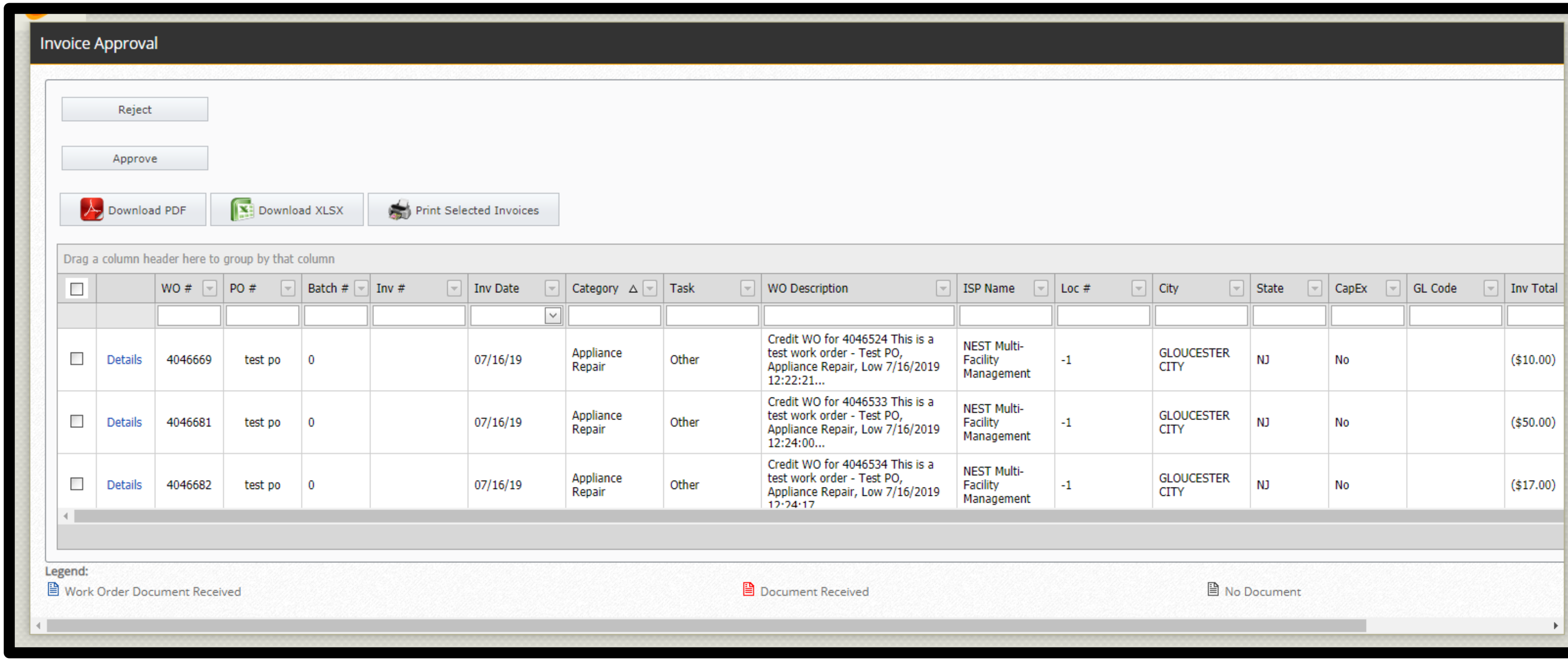
To approve, click “Approve” in the top left corner. Then, click “Approve” again in the top right corner

Proposals



To decline, click “Decline” in the top left corner.
Choose a reason from the drop down menu under “Decline Reason.” You also have the option to write a “Decline Message.”
Then, click “Decline” in the top right corner.

Invoice Approval



		WO #	PO #	Batch #	Inv #	Inv Date	Category	Task	WO Description	ISP Name	Loc #	City	State	CapEx	GL Code	Inv Total
☐	Details	4046669	test po	0		07/16/19	Appliance Repair	Other	Credit WO for 4046524 This is a test work order - Test PO, Appliance Repair, Low 7/16/2019 12:22:21...	NEST Multi-Facility Management	-1	GLOUCESTER CITY	NJ	No		($10.00)
☐	Details	4046681	test po	0		07/16/19	Appliance Repair	Other	Credit WO for 4046533 This is a test work order - Test PO, Appliance Repair, Low 7/16/2019 12:24:00...	NEST Multi-Facility Management	-1	GLOUCESTER CITY	NJ	No		($50.00)
☐	Details	4046682	test po	0		07/16/19	Appliance Repair	Other	Credit WO for 4046534 This is a test work order - Test PO, Appliance Repair, Low 7/16/2019 12:24:17	NEST Multi-Facility Management	-1	GLOUCESTER CITY	NJ	No		($17.00)

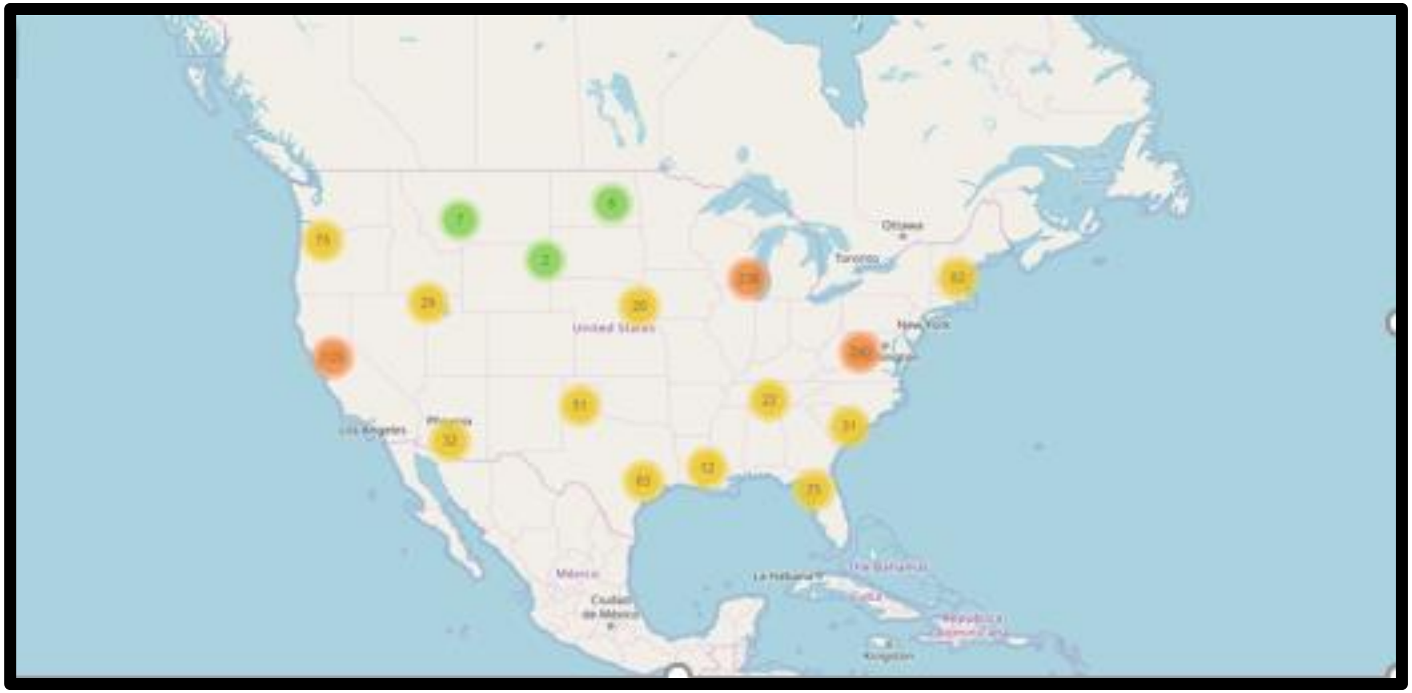
The Invoice Approval tab allows clients to view and approve invoices. Using the manual filters at the top of the grid or the filters in the list, users can manipulate the data to show smaller or larger sets as needed.

To approve or reject, users would select the invoice via checkbox to the left, then select Approve or Reject in the top right corner of the screen.

Reporting

The reporting tab allows clients to access pre-made reports, uploaded and maintained by the Sales department. These are static reports that have been previously run for the client and are now accessible to download in PDF.

Location Map



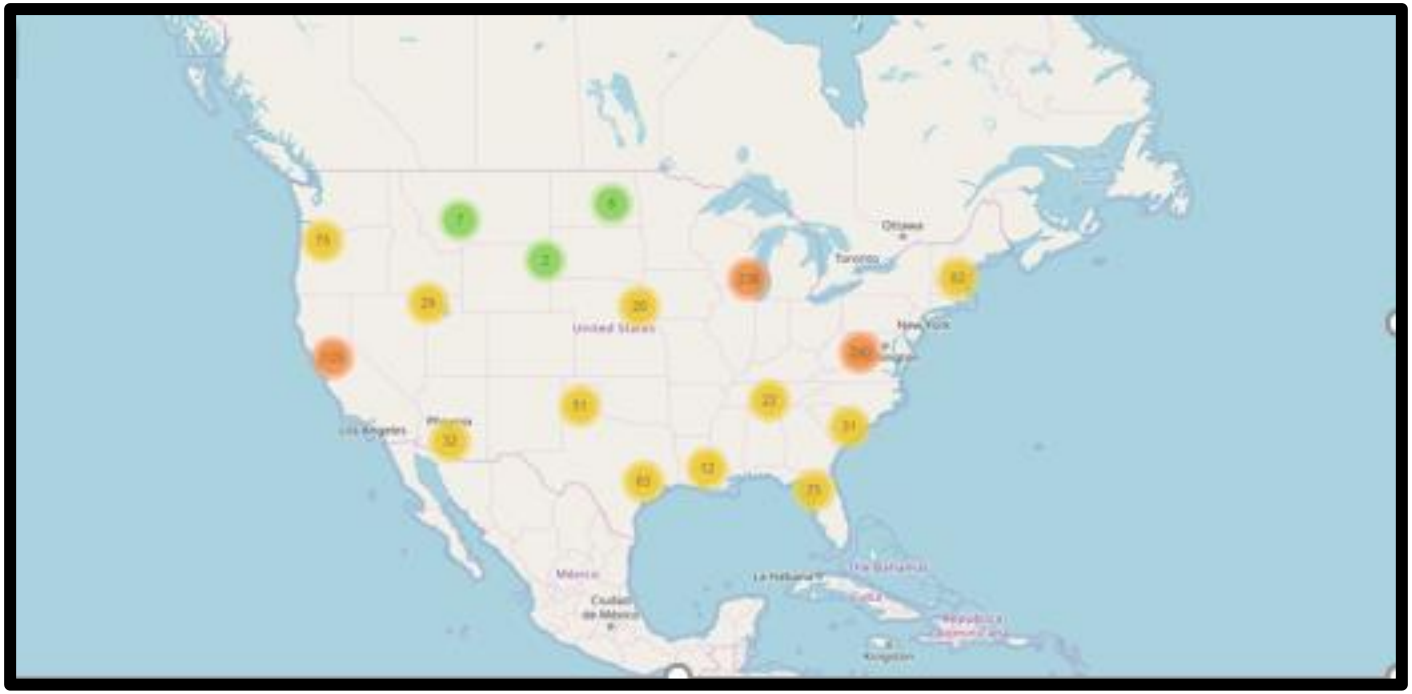
Location Map

The Location Map allows users to visually identify all of their locations (stores, restaurants, banks, schools, etc.) on a map.

The clusters shown on the map are groups of locations; because they are so close in relation, the map groups them into a cluster.

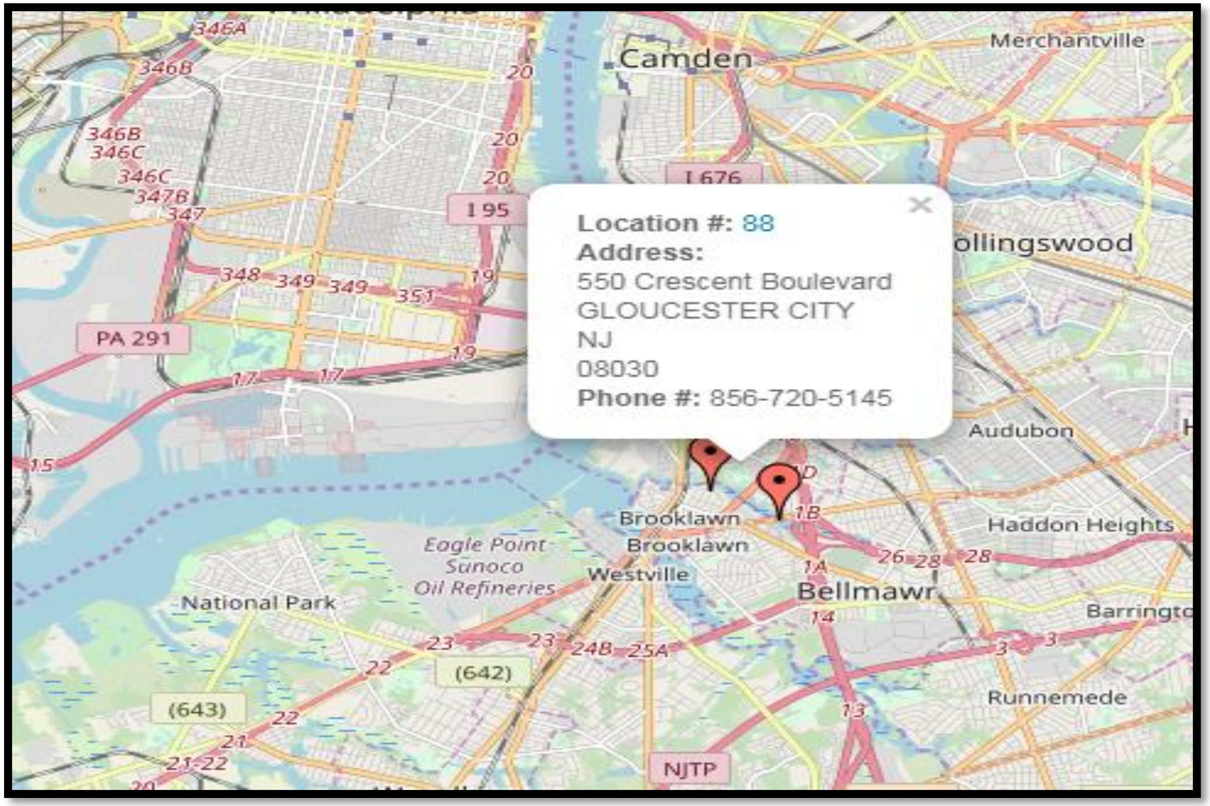
Zooming in allows the user to get more granular, showing individual push-pins instead of clusters.
Users can also click on the clusters to separate the push-pins manually, if the zoom in feature has enough space to do so.

Location Map



The color coding represents the number of locations within the cluster. If the cluster is green, there are less than 10 locations within the cluster. Yellow represents more than 10 locations in a cluster, orange represents more than 100 locations in a cluster. As the user zooms in and out, the cluster colors will change accordingly.

Location Map



To view the location within a cluster, zoom in until a push pin appears, then click it. This will show you the locations information. You can also click on location details.