



NEST

Multi-Facility Management

CLIENT PORTAL USER GUIDE – CORPORATE USER

The Login Page



Welcome to NEST Facilitate.
Please login.



USERNAME

PASSWORD

LOGIN

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Multi-Facility Management

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:

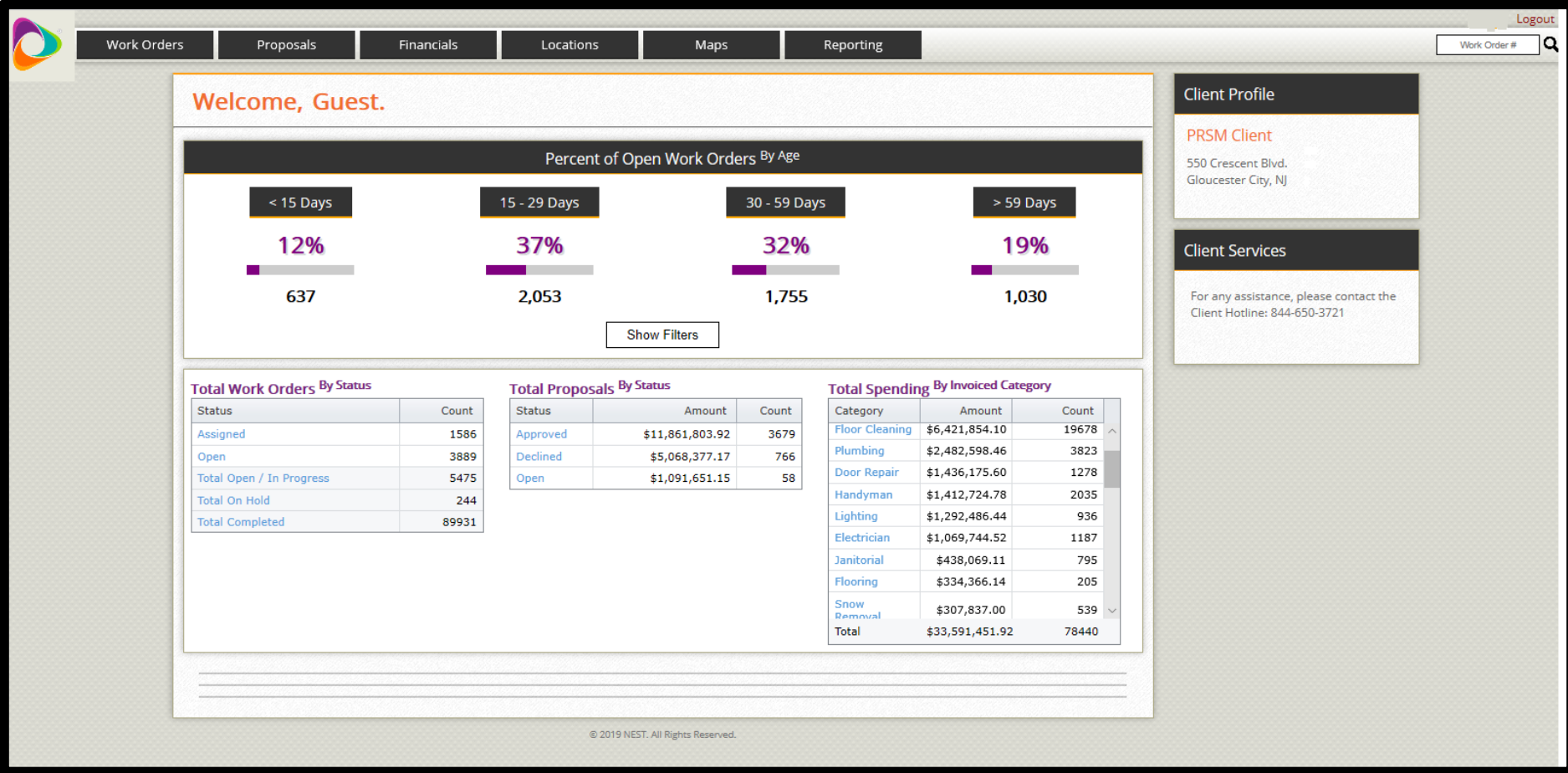
sales@enternest.com



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Multi-Facility Management

The Home Page



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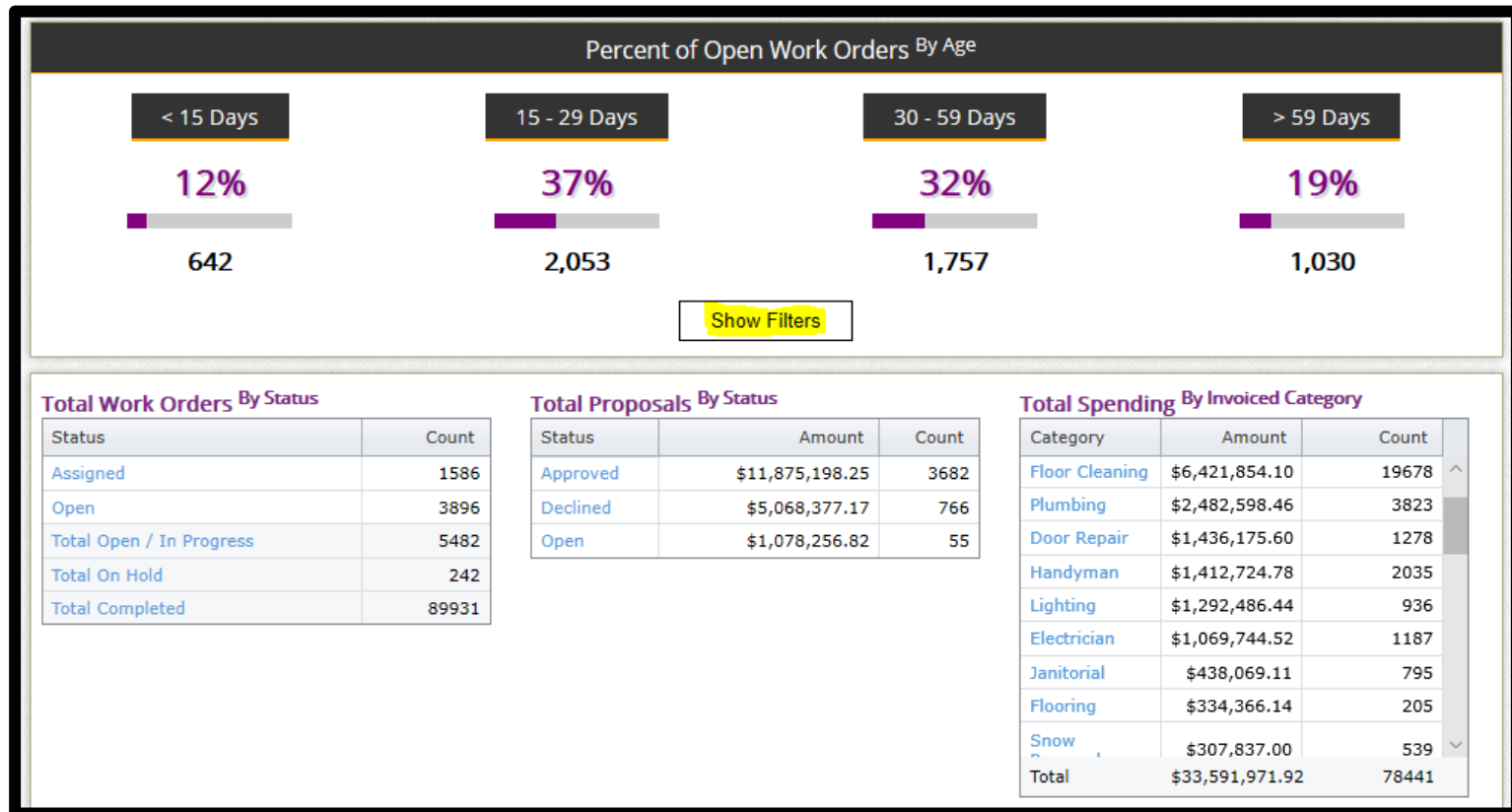
Multi-Facility Management

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



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



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The Home Page

Performance Metric
Open / In Progress Work Orders: ☒ Completed Work Orders: ☐ Open Invoices: ☐ Open Proposals: ☐

Filters
Locations: Category:
Work Order Type:
PM Work: ☒ Break-Fix Work: ☒
Select Time Frame:
Previous 12 months: ☐ YTD: ☒ MTD: ☐ WTD: ☐ Range: ☐
Start Date: End Date:

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
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 Removal	\$307,837.00	539
General Contracting	\$219,073.61	56
Windows		
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

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

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Window		
Total	\$33,591,971.92	78441



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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 List](#)
[Show Filters](#)

Download as

PDF
 XLSX

☒ Created Date
☐ Scheduled Date
from to

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



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Multi-Facility Management

The WO List

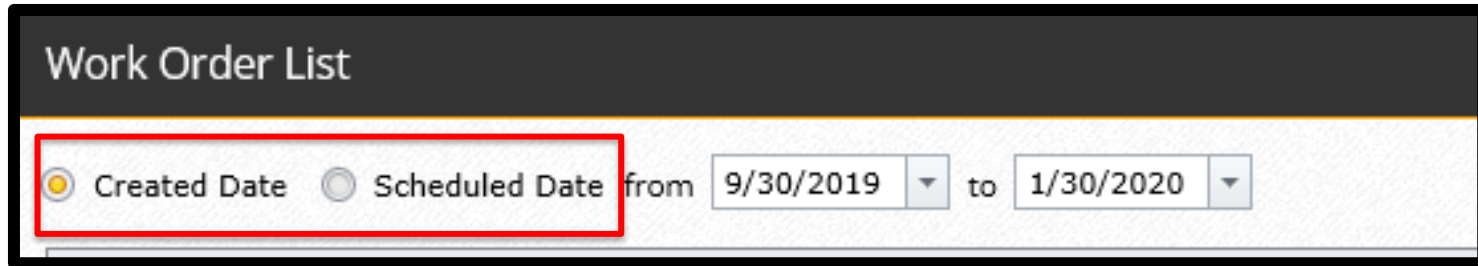
The WO List (Work Order List) is designed to show you various work orders associated with your locations.

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



Work Order List

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

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.

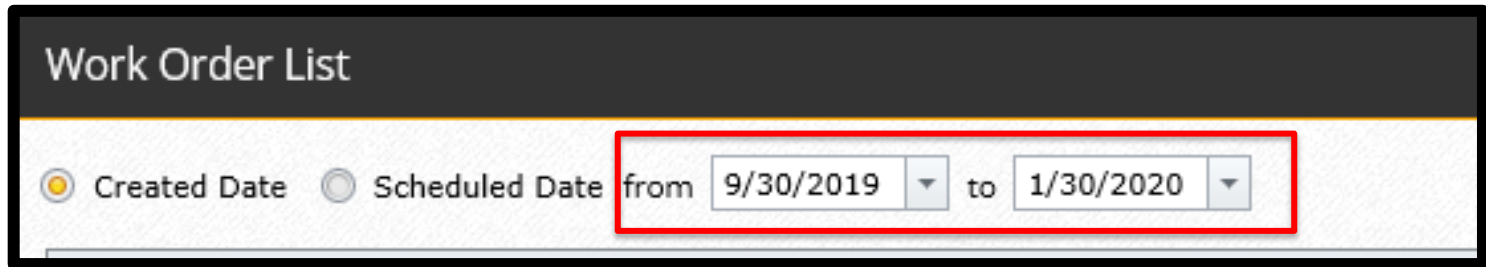
The type of “Schedule Date” will *only* display work orders that have been given a schedule date by NEST.



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The WO List



The screenshot shows a web interface for a 'Work Order List'. At the top, there's a dark header with the title 'Work Order List'. Below the header, there are two radio buttons: 'Created Date' (which is selected) and 'Scheduled Date'. To the right of these buttons, there is a date range filter. This filter is highlighted with a red rectangle and consists of the word 'from', a date input field containing '9/30/2019', a dropdown arrow, the word 'to', another date input field containing '1/30/2020', and a second dropdown arrow.

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.



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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

#	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

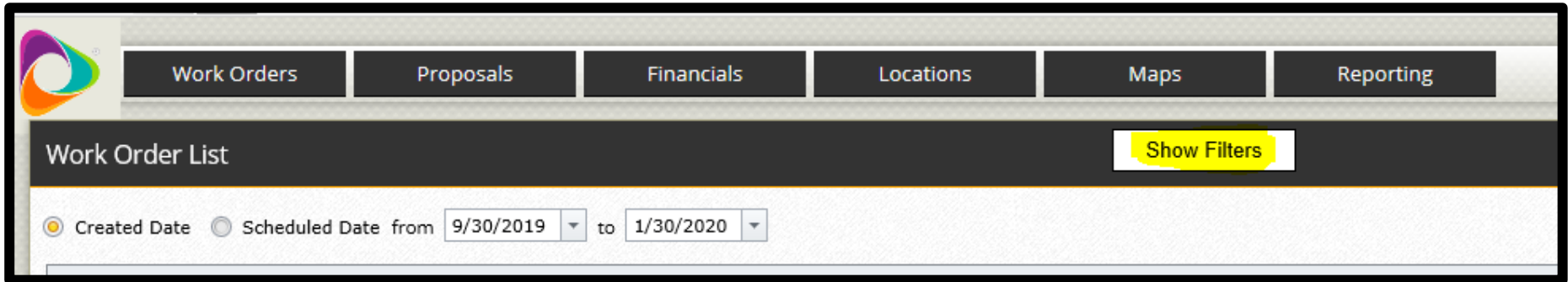
To export to PDF or Excel, click on of these two buttons.



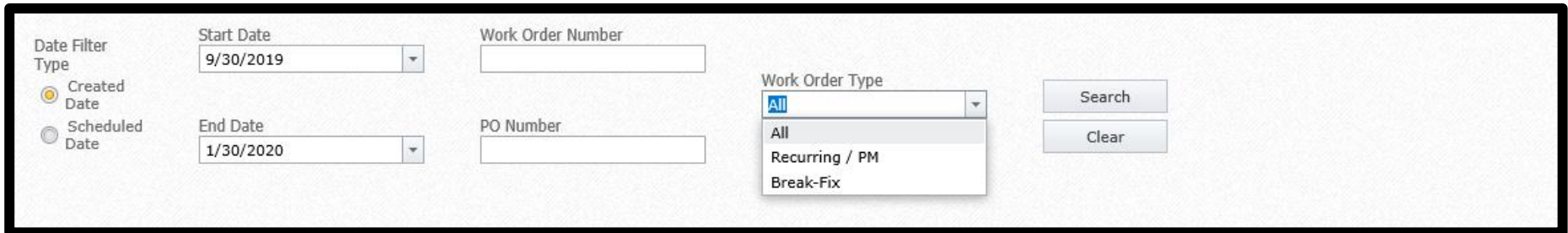
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Multi-Facility Management

The WO List



The screenshot shows the top navigation bar with tabs for Work Orders, Proposals, Financials, Locations, Maps, and Reporting. Below this is a dark header for the 'Work Order List' with a yellow 'Show Filters' button. Under the header, there are radio buttons for 'Created Date' (selected) and 'Scheduled Date', followed by date range selectors set to '9/30/2019' to '1/30/2020'.



This section shows the search and filter controls. On the left, 'Date Filter Type' has 'Created Date' selected. Next to it are 'Start Date' (9/30/2019) and 'End Date' (1/30/2020) dropdowns. To the right are text input fields for 'Work Order Number' and 'PO Number'. Further right is a 'Work Order Type' dropdown menu with options: 'All' (selected), 'Recurring / PM', and 'Break-Fix'. At the bottom right are 'Search' and 'Clear' buttons.

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.



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The WO List

The screenshot displays the 'Work Order List' interface. At the top, there's a header bar with 'Work Order List' on the left, 'Show Filters' in the center, and 'Download as' with PDF and XLSX icons on the right. Below the header, a filter bar shows 'Created Date' selected, with a date range from 9/30/2019 to 1/30/2020. A note indicates '147 Orders in 2 Pages'. The main table has columns: #, WO #, PO #, Project #, Created Date, Created By, Loc #, Priority, Order Status, Category, Task, WO Description, ISP Name, Scheduled Date, and Company. A dropdown menu is open over the 'Task' column, listing various tasks like 'Awning & Canopy Repair', 'Backflow', 'Building Exterior', etc. The table lists several work orders, mostly 'Cancelled' and 'Appliance Repair'. At the bottom, a status bar shows 'Count= 147' and page navigation controls.

#	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	Lead Time for parts: 0 days			PRSM Test Client
Details	4283041			12/30/2019	prsmclient	-1	Low	Cancelled	Appliance Repair	Appliance Repair	WO - okay to cancel			Unapplied Account
Details	4283040			12/30/2019	prsmclient	3	Low	Cancelled	Appliance Repair	Appliance Repair	wo			PRSM Test Client
Details	4281152			12/24/2019	ABonanno	3	Regular	Cancelled	Appliance Repair	Appliance Repair	WORK ORDER ONLY. DO NOT EDIT.			PRSM Test Client
Details	4277684			12/23/2019	rcooper	3	Regular	Cancelled	Appliance Repair	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.



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The WO List

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

To sort your columns, simply click on the column header name.

Clicking twice will cause your list to reverse sort.



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The WO List

The image shows a software interface for managing work orders. On the left is a 'Work Order List' with a table of work orders. The first row is highlighted, and a red box around the 'Details' link in the first column has a red arrow pointing to the 'Work Order Details' view on the right. The details view shows information for work order 4283060, which is cancelled. It includes a description of the task, a list of tabs for different views, and a section for work order information.

Work Order List

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

Drag a column header here to group by that column

#	WO #	PO #	Project #	Created Date
Details	4283060			
Details	4283041			
Details	4283040			
Details	4281152			

Work Order Details for 4283060 Cancelled

Task: Appliance Repair

DESCRIPTION OF WORK

testLead Time for parts: 0 days

COPY TO CLIPBOARD

Order Detail Order Notes Order Documents Work Order Photos Upload Documents IVR Recurrings Surveys Assets

Work Order Information

Work Order #:	4283060	Category:	Appliance Repair
Order Status:	Cancelled	Task:	Appliance Repair
Created Date:	12/30/2019 8:47:34 AM	Priority:	Low
Created By:	rcooper	ISP Name:	
Schedule Date:		Cancel Reason:	Created for Training Tests
Completed Date:			
Work Performed:			

Edit Work Order

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



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Multi-Facility Management

The WO List

4268077			12/14/2019	rcsooper	3	Regular	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																
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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.



NEST

Multi-Facility Management

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)



NEST

Multi-Facility Management

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	



NEST

Multi-Facility Management

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.



NEST

Multi-Facility Management

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.



NEST

Multi-Facility Management

Add WO

New Work Order Request:

Company:
PRSM Location
Store Number:
-1

Address 1:
550 Crescent Blvd
Address 2:

City/State/ZIP:
Gloucester City, NJ, 08030
Phone:

Account Number:
PRSM Test Client-U

DO YOUR VERY BEST TO SELECT THE APPROPRIATE TASK INSTEAD OF "OTHER".

PO Number:

Category:

Task:

Priority:

Service Instructions:
Please enter a description of the problem.

Cancel

Save

Location Work History:

WO #	Status	Schedule Date	Category	Task	Completion Date	Scope of Work
4104849	Completed	8/30/2019 10:00 AM	Adjustable Base	DPOE	8/26/2019 8:26 AM	test Lead Time for parts: 0 days
4068514	Cancelled		Adjustable Base	CPSC		test

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.

The NEST logo is a stylized, colorful icon consisting of several overlapping curved shapes in shades of blue, green, and orange, forming a circular, nest-like shape.

NEST

Multi-Facility Management

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

2

\$1,542.77\$84.20\$1,626.97



NEST

Multi-Facility Management

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.

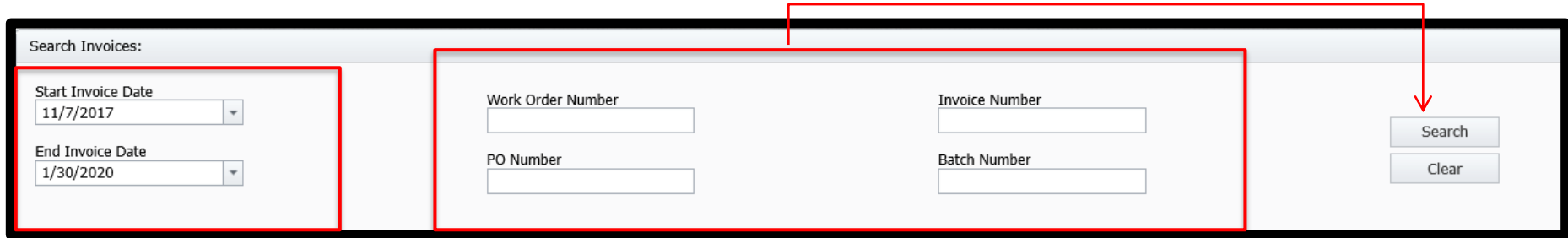
If you'd like to see a copy of any invoice, they can even be sent to you directly via email.



NEST

Multi-Facility Management

Invoices



The screenshot shows a 'Search Invoices' form with the following fields and controls:

- Start Invoice Date:** A date picker showing '11/7/2017'.
- End Invoice Date:** A date picker showing '1/30/2020'.
- Work Order Number:** A text input field.
- PO Number:** A text input field.
- Invoice Number:** A text input field.
- Batch Number:** A text input field.
- Search:** A button to execute the search.
- Clear:** A button to reset the form.

Red annotations highlight the date fields, the main input fields, and the search/clear buttons.

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.



NEST

Multi-Facility Management

Invoices

Search Invoices:

Start Invoice Date 11/7/2017	Work Order Number
End Invoice Date 1/30/2020	PO Number

 Download PDF  Download XLSX  Print Selected Invoices

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



NEST

Multi-Facility Management

Invoices

Invoice Listing

Search Invoices:

Start Invoice Date

11/7/2017

End Invoice Date

1/30/2020

Work Order Number

PO Number

Download PDF

Download XLSX

Print Selected Invoices

Drag a column header here to group by that column

☐	#	WO #	PO #	Priority	Category	Task
☒	Details	4103969	TEST	Low	Appliance Repair	Appliance Repair
☐	Details	4104509		Regular	Appliance Repair	Appliance Repair

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.”



NEST

Multi-Facility Management

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 Own	Active
Details	Unapplied Account			-1		550 Crescent Blvd		GLOUCESTER 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	PHILADELPHIA	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 >



NEST

Multi-Facility Management

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

Location Listing

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 Own	Av
Details	Unapplied Account			-1		550 Crescent Blvd		GLOUCESTER CITY	NJ	08030			No	No	Ye

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



NEST

Multi-Facility Management

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
Details	Unapplied Account			-1		550 Crescent Blvd	
Details	Seth Rogan			0000000		420 White Owl Ave	
Details	Gretchen Wieners			0000001		85 Toaster Strudel Lane	
Details	Blake Randof			0000003		123 Klap Ave	

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



NEST

Multi-Facility Management

Locations

The screenshot displays the 'Location Information' page in the NEST software. On the left, a sidebar contains location details for 'Unapplied Account' at '550 Crescent Blvd', 'GLOUCESTER CITY, NJ 08030'. A red box highlights the 'Add New Work Order' button. The main area features a tabbed interface with 'Work History' selected, showing a table of completed work orders.

#	WO #	Status	Onsite Date	Category	Task	Completion Date	Scope of
Details	4181026	Completed	10/16/2019 12:00 AM	JoAnn Catalog	"Take a Number" Sign Broken or Missing	10/15/2019 12:00 AM	
Details	4182216	Completed	10/15/2019 12:00 AM	Awning & Canopy Repair	Other	10/15/2019 12:00 AM	
Details	4104849	Completed	8/30/2019 10:00 AM	Adjustable Base	DPOE	8/26/2019 8:26 AM	
Details	4104565	Completed	8/29/2019 2:00 AM	Appliance Repair	Appliance Repair	8/25/2019 7:39 PM	
Details	4104579	Completed	8/26/2019 12:00 AM	Appliance Repair	Other	8/25/2019 12:00 AM	
Details	4104580	Completed	8/26/2019 12:00 AM	Appliance Repair	Other	8/25/2019 12:00 AM	

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



NEST

Multi-Facility Management

Location Information: Work History

Location Information

Company: Unapplied Account
Location: -1
Address: 550 Crescent Blvd
City: GLOUCESTER CITY
State: NJ
Zip: 08030
Telephone:
Fax:
Emergency:
Open Date:

Add New Work Order

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

#	WO #	Status	Onsite Date	Category	Task	Completion Date	Scope of
Details	4181026	Completed	10/16/2019 12:00 AM	JoAnn Catalog	"Take a Number" Sign Broken or Missing	10/15/2019 12:00 AM	
Details	4182216	Completed	10/15/2019 12:00 AM	Awning & Canopy Repair	Other	10/15/2019 12:00 AM	
Details	4104849	Completed	8/30/2019 10:00 AM	Adjustable Base	DPOE	8/26/2019 8:26 AM	
Details	4104565	Completed	8/29/2019 2:00 AM	Appliance Repair	Appliance Repair	8/25/2019 7:39 PM	
Details	4104579	Completed	8/26/2019 12:00 AM	Appliance Repair	Other	8/25/2019 12:00 AM	
Details	4104580	Completed	8/26/2019 12:00 AM	Appliance Repair	Other	8/25/2019 12:00 AM	

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.



NEST

Multi-Facility Management

Location Information: Location Notes

The screenshot shows a web application interface for managing location information. On the left, a sidebar titled "Location Information" contains fields for Company (Unapplied Account), Location (-1), Address (550 Crescent Blvd), City (GLOUCESTER CITY), State (NJ), Zip (08030), Telephone, Fax, Emergency, and Open Date. Below these fields is a button labeled "Add New Work Order".

The main content area has a tabbed interface with the following tabs: Work History, Location Notes (highlighted), Recurring Work, Assets, Surveys, Location Documents, Location Photos, and Property Managers/Landlord. The "Location Notes" tab is active, displaying a large text input box at the top with a "Save Note" button to its right. Below the text box is a table with the following structure:

Drag a column header here to group by that column			
Note Type	Notes	Author	Created Date
Web Note	test	prsmclient	6/13/2019 10:16:50 AM
Web Note	test note	prsmclient	7/16/2019 1:36:33 PM
Web Note	test	prsmclient	10/15/2019 9:17:55 AM
Web Note	Alex B Test	prsmclient	10/15/2019 3:57:12 PM
Web Note	Alex B - Test #2 for refresh of page	prsmclient	10/15/2019 3:57:57 PM
Web Note	Alex B - Test #2 for refresh of page	prsmclient	10/15/2019 3:58:02 PM

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”



NEST

Multi-Facility Management

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



NEST

Multi-Facility Management

Location Information: Assets

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



NEST

Multi-Facility Management

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



NEST

Multi-Facility Management

Location Information: Location Documents

Work History Location Notes Recurring Work Assets Surveys Location Documents Location Photos Property Managers/Landlord			
View Document	File Name	Input By	Input Date
View	ISPIInv-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

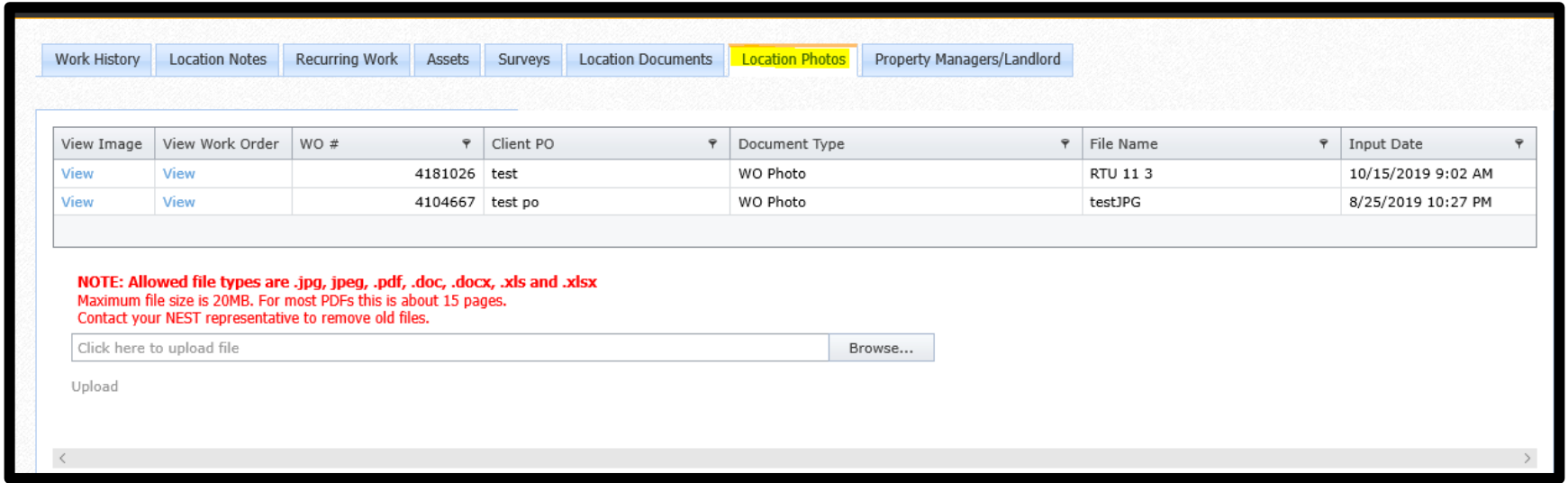
The Location Documents tab will show all documents that are associated with this location



NEST

Multi-Facility Management

Location Information: Location Photos



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

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

NOTE: Allowed file types are .jpg, jpeg, .pdf, .doc, .docx, .xls and .xlsx
Maximum file size is 20MB. For most PDFs this is about 15 pages.
Contact your NEST representative to remove old files.

Click here to upload file

Upload

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”



NEST

Multi-Facility Management

Location Information: Property Managers/Landlord

Work History

Location Notes

Recurring Work

Assets

Surveys

Location Documents

Location Photos

Property Managers/Landlord

Manager Type	Name	Phone #	Mobile #	Email Address
District Manager	Bea Arthur		487-854-8898	B.Arthur@gldngurlz.net
General Manager	Rue McClanahan	212-847-4425	487-665-7418	R.McClanahan@gldngurlz.net
Assistant Store Manager	Betty White	212-847-4425		B.White@gldngurlz.net
Team Leader	Estelle Getty			E.Getty@gldngurlz.net

Comments

Comments are internal and are used by NEST to schedule, follow-up, or even if there are specific instructions for contacting the location.

Site Instructions

Site instructions found here. These instructions appear on every work order created for this location.

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



NEST

Multi-Facility Management

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](#)



NEST

Multi-Facility Management

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.



NEST

Multi-Facility Management

Surveys

Survey Listing:

Location Number

Survey Description

Enter all or part of the survey description.

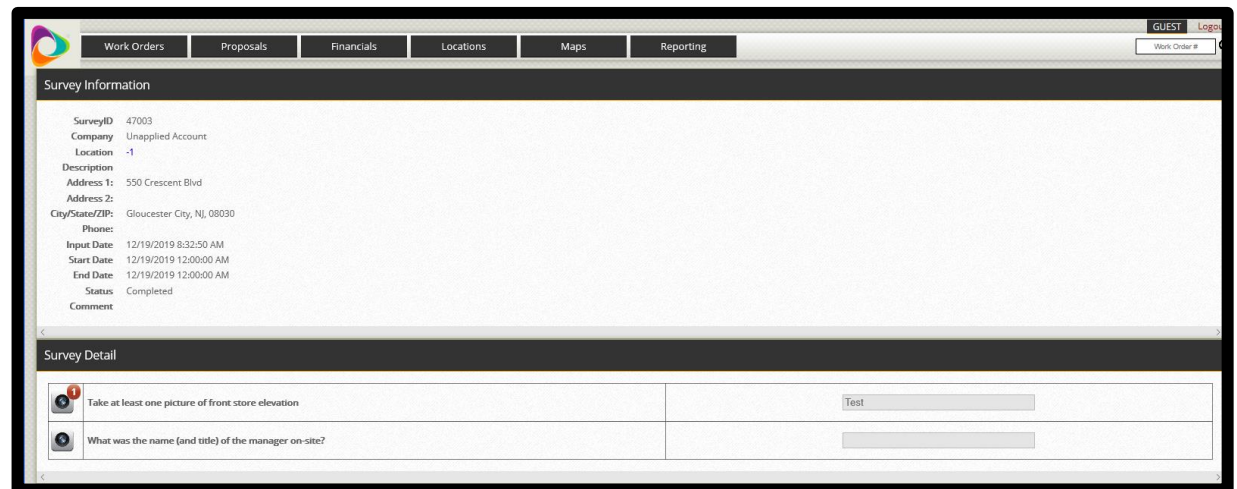
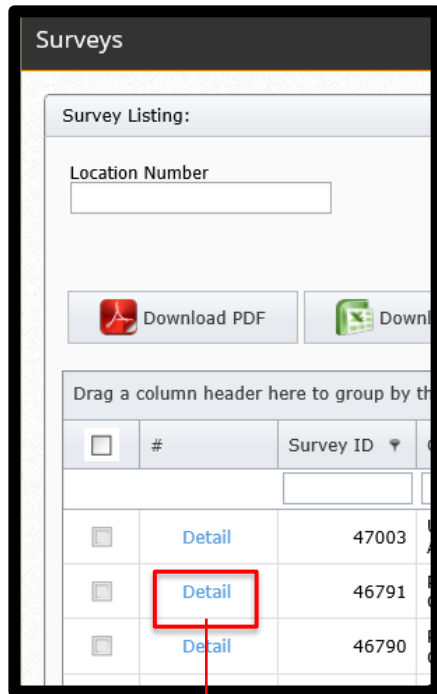
Search

Clear

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.



NEST

Multi-Facility Management

Surveys

Survey Information

SurveyID

47003

Company

Unapplied Account

Location

-1

Description

Address 1:

550 Crescent Blvd

Address 2:

City/State/ZIP:

Gloucester City, NJ, 08030

Phone:

Input Date

12/19/2019 8:32:50 AM

Start Date

12/19/2019 12:00:00 AM

End Date

12/19/2019 12:00:00 AM

Status

Completed

Comment

Survey Detail



Take at least one picture of front store elevation

Test

Close



Click Photo for Preview

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

Surveys

Survey Listing:

Location Number

Survey Description

 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

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.”



NEST

Multi-Facility Management

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 >



NEST

Multi-Facility Management

Assets

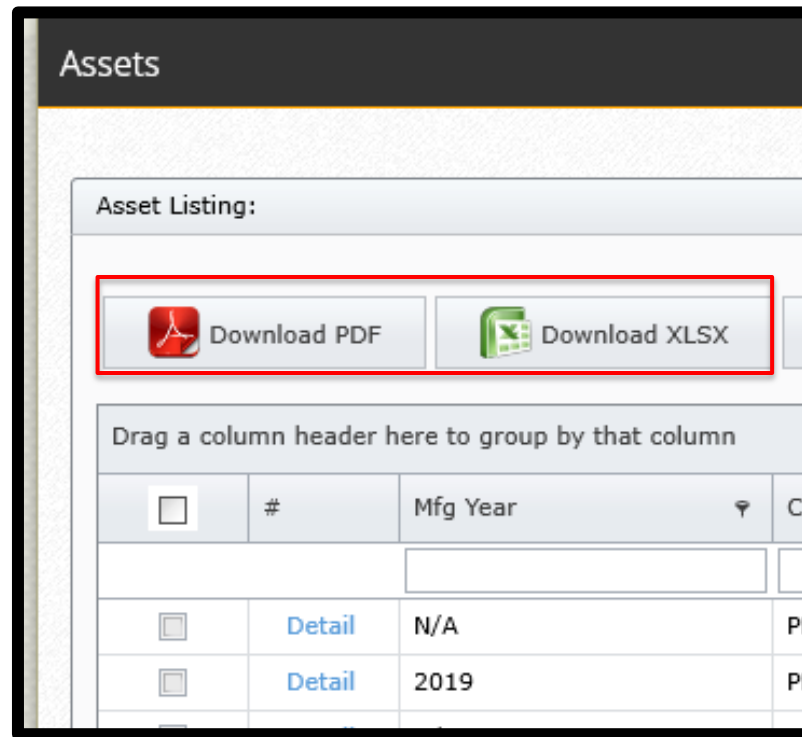
The Assets tab is designed to track and display your locations' assets. Assets usually refer to equipment found at your stores. For example, Heating & Cooling units, Backflow devices, or Hot Water Heaters.

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.



NEST

Multi-Facility Management

Assets

The screenshot displays the 'Assets' management interface. At the top, there's a header 'Assets'. Below it, the 'Asset Listing:' section contains three buttons: 'Download PDF', 'Download XLSX', and 'Print Selected Assets'. A instruction 'Drag a column header here to group by that column' is shown above a table with columns: '#', 'Mfg Year', 'Company', and 'Loc #'. The table lists three assets, with the first one highlighted. A red box highlights the 'Detail' link in the first row, and a red arrow points from it to the 'Asset Detail Information' window.

Asset Listing:

Download PDF Download XLSX Print Selected Assets

Drag a column header here to group by that column

	#	Mfg Year	Company	Loc #
☐				
☐	Detail	N/A	PRSM Test Client	
☐	Detail	2019	PRSM Test Client	
☐	Detail	N/A	PRSM Test Client	

Asset Detail Information

Asset Information

Asset ID: 12336
Company: PRSM Test Client
Location: 5
Address 1: 9876 Street Road
Address 2:
City/State/ZIP: LAS VEGAS, NV, 89109
Phone:
Description: Air Handler
Date Added: 3/28/2012 2:10:21 PM
Comment: Test
Comment: Asset
Comment: (PRSM)

Asset Detail

Manufacturer: York
Model Number: 26516716
Serial Number: 198771
Manufactured Date: 3/1/2005
Tonnage: 15
Center Maintained: ☒
R-410A: ☐

Asset Work History Photos (2)

WO #	Status	Onsite Date	Category	Task	Completion Date	Scope of Work

No data to display

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



NEST

Multi-Facility Management

Assets

The screenshot displays the NEST Multi-Facility Management interface. On the left, the 'Asset Detail' tab is active, showing the following information:

- Manufacturer:** York
- Model Number:** 26516716
- Serial Number:** 198771
- Manufactured Date:** 3/1/2005
- Tonnage:** 15
- Center Maintained:** ☒
- R-410A:** ☐

On the right, the 'Photos (2)' tab is selected and highlighted with a red box. It displays a large photo of a rooftop HVAC system with labels: 'HVAC Units', 'Exhaust Vents', and 'HVAC Unit'. A north arrow is visible in the top right corner of the photo. Two smaller thumbnail photos are visible on the left side of the main photo.

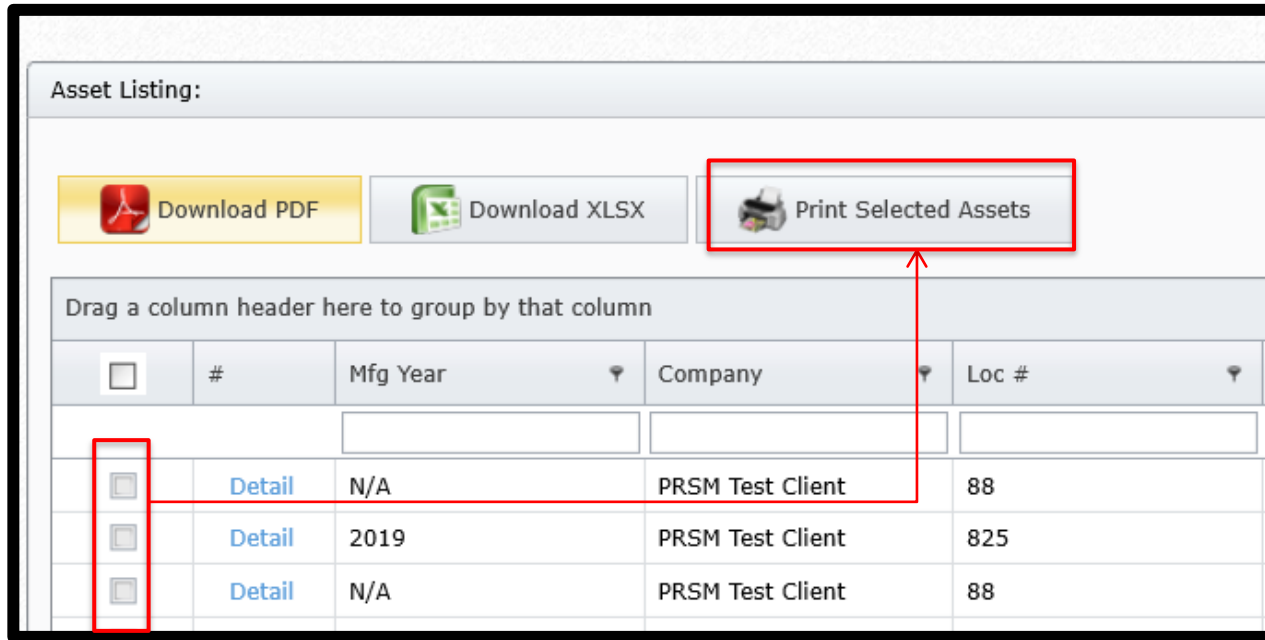
To view the photos associated with an asset, click the Photos tab.



NEST

Multi-Facility Management

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.



NEST

Multi-Facility Management

Proposals

Date Filter Type
☒ Quote Date
☐ Review Date

Start Date

11/10/2014

End Date

12/30/2019

Proposal Status

Approved

Search

Download PDF

Download XLSX

Emergency and Urgent Proposals are in RED.

Drag a column header here to group by that column

#	WO #	Client PO	Priority	WO Status	Task	Scope of Work	Loc #	District	Region	Subtotal	Tax	Total	Quoted	Expires	Quote Status	Review Date
Detail	N/A	1957625	test	Low	Cancelled	Other	000001	A	A	\$287.00	\$22.96	\$309.96	12/8/2014	1/7/2015	Approved	
Detail	N/A	1992025	test	Low	Cancelled	Clogged Drain Line	000001	A	A	\$100.00	\$0.00	\$100.00	1/6/2015	2/5/2015	Approved	
Detail	N/A	2033398	TEST	Low	Cancelled	Replace VCT Tiles	000001	A	A	\$400.00	\$0.00	\$400.00	2/19/2015	3/21/2015	Approved	
Detail	N/A	2112514	Training	Low	Cancelled	Ceiling Tile Replacement	000001	A	A	\$254.00	\$0.00	\$254.00	5/6/2015	6/5/2015	Approved	
Detail	N/A	2241066	test	Low	Cancelled	Other	000001	A	A	\$1,250.00	\$84.00	\$1,334.00	9/3/2015	10/3/2015	Approved	

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.



NEST

Multi-Facility Management

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

Manage Proposals

Date Filter Type

☒ Quote Date

☐ Review Date

Start Date

11/10/2014

End Date

12/30/2019

Proposal Status

Approved

Search

 Download PDF

 Download XLSX

Emergency and Urgent Proposals are in RED.

Drag a column header here to group by that column

#		WO #	Client PO	Priority	WO Status	Task	Scope of Work	Loc #	District
Detail	N/A	1957625	test	Low	Cancelled	Other	Created for training tests. \highlight1 Please do not cancel. \highlight0none	000001	A
Detail	N/A	1992025	test	Low	Cancelled	Clogged Drain Line	test WO	000001	A

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



NEST

Multi-Facility Management

Proposals

The image shows a software interface for managing proposals. The main window is titled "Manage Proposals" and contains filters for "Date Filter Type" (Quote Date, Review Date), "Start Date" (11/10/2014), and "Proposal Status" (Approved). Below the filters is a "Download PDF" button and a table with columns for "#", "WO #", and a "Detail" icon. A red box highlights the "Detail" icon for the proposal with WO # 1957625. A red arrow points from this icon to a larger, detailed view of the work order.

The detailed view is titled "Work Order Details for 1957625" and shows the following information:

- Task:** Other
- DESCRIPTION OF WORK:** Created for training tests. Please do not cancel.
- Order Detail:** Order Notes, Order Documents, Work Order Photos, Upload Documents, IVR, Recurrings, Surveys, Assets
- Work Order Information:**
 - Work Order #: 1957625
 - Order Status: Cancelled
 - Created Date: 12/1/2014 3:40:58 PM
 - Created By: ABonanno
 - Schedule Date:
 - Completed Date:
 - Work Performed:
 - Category: Heating & Cooling
 - Task: Other
 - Priority: Low
 - ISP Name:
 - Cancel Reason: Created for Training Tests
- Location Information:**
 - Company: PRSM Test Client
 - Region: A
 - District: A
 - Loc #: 000001
 - Address 1: 1234 Philadelphia Ave
 - Address 2: Suite 123
 - City/State/ZIP: PHILADELPHIA, PA, 19145
 - Phone: 555-555-1234
- Accounting:**
 - PO #: test
 - GL Code:
 - Project #:
 - CapEx: ☐
 - Invoice Status: Not Invoiced
 - Invoice #:
 - Subtotal: \$337.00
 - Tax: \$26.96
 - Total: \$363.96

A "Save" button is located at the bottom right of the Accounting section.

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



NEST

Multi-Facility Management

Proposals

The image displays two overlapping screenshots from a web application. The background screenshot shows the 'Manage Proposals' interface with filters for Date Filter Type (Quote Date, Review Date), Start Date (12/30/2018), End Date (12/30/2019), and Proposal Status (Approved). It includes download buttons for PDF and XLSX, and a table of proposals. The foreground screenshot shows a detailed view of a quote for 'PESH Test Client' with a quote number of 758499. The quote details include client information, location, and a table of services with a total of \$5.46.

Manage Proposals

Date Filter Type: ☒ Quote Date ☐ Review Date

Start Date: 12/30/2018

End Date: 12/30/2019

Proposal Status: Approved

Search

Download PDF Download XLSX Emergency and Urgent Proposal

Drag a column header here to group by that column

#	WO #	Client PO	Priority	WO Status	Task
Detail View	3757489		Low	Cancelled	Applian
Detail View	3757504		Low	Cancelled	Applian

Quote Details

Quote # 758499
Quote Date 12/30/2019
Quote Due By Date 01/01/2020

CLIENT NAME: PESH Test Client
LOCATION ADDRESS: 1234 Test Avenue, Anywhere Shopping Centre
CITY, STATE, ZIP: SHAWNEE MISSION, KS 64250

LOC # 3
CUSTOMER PO 4283292
NEST NO 4283292
NEST REPRESENTATIVE: rcomper
NEST RESPONSIBILITY (BUSINESS DAYS): 0

DESCRIPTION OF WORK

QTY / HRS	TYPE	DESCRIPTION	UNIT PRICE	TAX	TOTAL
1	Initial Call	Initial Call	\$5.00	\$0.46	\$5.46
SUB TOTAL			\$5.00	\$0.46	\$5.46
TOTAL			\$5.46		\$5.46

☐ I accept this quote and approve work to be performed as described above

☐ I decline this quote at this time and understand that the initial call, if applicable will be invoiced

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



NEST

Multi-Facility Management

- 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

☒ Approve ☐ Decline	PO Number (optional)	Capital Expense ☐		Cancel Approve
---	---	--	--	--

Work Order #4283292 Details

ViewProposal1.aspx
1 / 1

550 Crescent Boulevard
Gloucester City, NJ 08030
Phone 856-720-5100 Fax 856-456-5860
service@enternest.com

QUOTE

Quote # 758499
Quote Date 12/30/2019
Quote Due By Date 01/01/2020

CLIENT NAME		CLIENT CONTACT NAME	
PRSM Test Client			
DBA	LOCATION ADDRESS	CITY, STATE, ZIP	
PRSM Test Client	1234 Test Avenue <i>Anywhere Shopping Centre</i>	SHAWNEE MISSION, KS 66250	
LOC #	CUSTOMER PO	NEST WO	NEST REPRESENTATIVE
3		4283292	rcooper
PARTS AVAILABILITY (BUSINESS DAYS)			
0			

DESCRIPTION OF WORK

Test Client Service Record

QTY / HRS	TYPE	DESCRIPTION	UNIT PRICE	TAX	TOTAL
1	Initial Call	Initial Call	5.00	0%	5.00
SUB TOTAL					\$5.00
TAX					\$0.46
TOTAL					\$5.46

If applicable, the cost for initial service call is included in this proposal. If this proposal is not approved within 14 calendar days, we will bill you separately for the initial service call. Orders for custom units cannot be cancelled after 5 days of approval as these units are manufactured per application and cannot be returned to the manufacturer or distributor. Cancellations must be submitted in writing. Customer is responsible for any charges made by the manufacturer / supplier for cancelling a custom order unit. All parts are covered by the manufacturers' Limited Warranties and Limitation of Remedies. No agent, buyer, or representative is authorized to make any warranties on behalf of NEST or on behalf of the manufacturer.

☐ I accept this quote and approve work to be performed as described above

☐ I Decline this quote at this time and understand that the initial call, if applicable will be invoiced

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

Approve **Decline** PO Number (optional) Capital Expense Cancel **Approve**

Work Order #4283292 Details ViewProposal1.aspx 1 / 1

NEST 550 Crescent Boulevard
Gloucester City, NJ 08030
Phone 856-720-5100 Fax 856-456-5860
service@enternest.com

QUOTE
Quote # 758499
Quote Date 12/30/2019
Quote Due By Date 01/01/2020

CLIENT NAME		CLIENT CONTACT NAME			
PRSM Test Client					
DBA	LOCATION ADDRESS	CITY, STATE, ZIP			
PRSM Test Client	1234 Test Avenue Anywhere Shopping Centre	SHAWNEE MISSION, KS 66250			
LOC #	CUSTOMER PO	NEST WO	NEST REPRESENTATIVE	PARTS AVAILABILITY (BUSINESS DAYS)	
3		4283292	rcosper	0	
DESCRIPTION OF WORK					
Test Client Service Record					
QTY / HRS	TYPE	DESCRIPTION	UNIT PRICE	TAX	TOTAL
1	Initial Call	Initial Call	5.00	0	5.00
				SUB TOTAL	\$5.00
				TAX	\$0.46
				TOTAL	\$5.46

If applicable, the cost for initial service call is included in this proposal. If this proposal is not approved within 14 calendar days, we will bill you separately for the initial service call. Orders for custom units cannot be cancelled after 5 days of approval as these units are manufactured per application and cannot be returned to the manufacturer or distributor. Cancellations must be submitted in writing. Customer is responsible for any charges made by the manufacturer / supplier for cancelling a custom order unit. All parts are covered by the manufacturer's Limited Warranties and Limitation of Remedies. No agent, buyer, or representative is authorized to make any warranties on behalf of NEST or on behalf of the manufacturer.

☐ I accept this quote and approve work to be performed as described above ☐ I Decline this quote at this time and understand that the initial call, if applicable will be invoiced

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



NEST

Multi-Facility Management

Proposals

The screenshot displays the NEST software interface for viewing a proposal. At the top, there are two buttons: 'Approve' (green) and 'Decline' (red). The 'Decline' button is highlighted with a red box. To the right of these buttons is a section for 'Decline Reason' (Required) and 'Decline Message' (optional). The 'Decline Reason' dropdown menu is open, showing '- Select a Reason -'. The 'Decline Message' text box is empty. In the top right corner, there are 'Cancel' and 'Decline' buttons. The 'Decline' button is highlighted with a red box. Below the top bar, the main content area shows a 'Work Order #4283292 Details' tab and a 'ViewProposal1.aspx' window. The 'ViewProposal1.aspx' window displays a 'QUOTE' form for NEST. The form includes the NEST logo, address (550 Crescent Boulevard, Gloucester City, NJ 08030), phone (856-720-5100), fax (856-456-5860), and email (service@enternest.com). It also includes a barcode, quote number (758499), quote date (12/30/2019), and quote due by date (01/01/2020). The form is divided into sections for CLIENT NAME, CLIENT CONTACT NAME, DBA, LOCATION ADDRESS, CITY, STATE, ZIP, LOC #, CUSTOMER PO, NEST WO, NEST REPRESENTATIVE, PARTS AVAILABILITY (BUSINESS DAYS), DESCRIPTION OF WORK, and Test Client Service Record. The 'Test Client Service Record' section contains a table with columns: QTY / HRS, TYPE, DESCRIPTION, UNIT PRICE, TAX, and TOTAL.

QTY / HRS	TYPE	DESCRIPTION	UNIT PRICE	TAX	TOTAL
3					

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.



NEST

Multi-Facility Management

Invoice Approval

Invoice Approval

Reject

Approve

Download PDF

Download XLSX

Print Selected Invoices

Drag a column header here to group by that column

☐		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)

Legend:

Work Order Document Received

Document Received

No Document

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.



NEST

Multi-Facility Management

Reporting

Financial Documents			
Financials			
Current			
Archived			
	9/29/2014	Annual Financials	Base Analysis
	9/29/2014	Annual Financials	Complete Analysis
	9/29/2014	Annual Financials	Budget by Store-Service
	9/29/2014	Annual Financials	Budget & Forecasting Tool

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.



NEST

Multi-Facility Management

Location Map



NEST

Multi-Facility Management

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



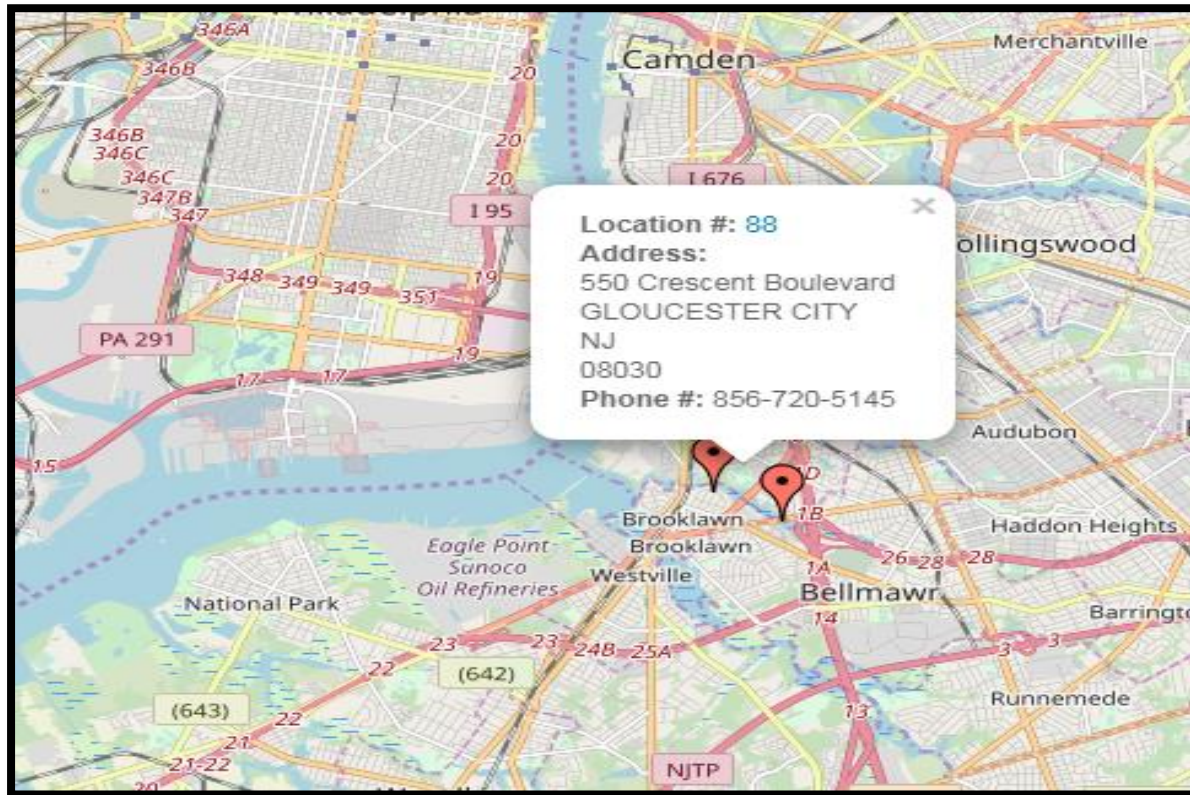
The color coding represents the number of locations within the cluster. If the cluster is green, there are less than 10 locations within the cluster. Yellow represents more than 10 locations in a cluster, orange represents more than 100 locations in a cluster. As the user zooms in and out, the cluster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



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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.



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