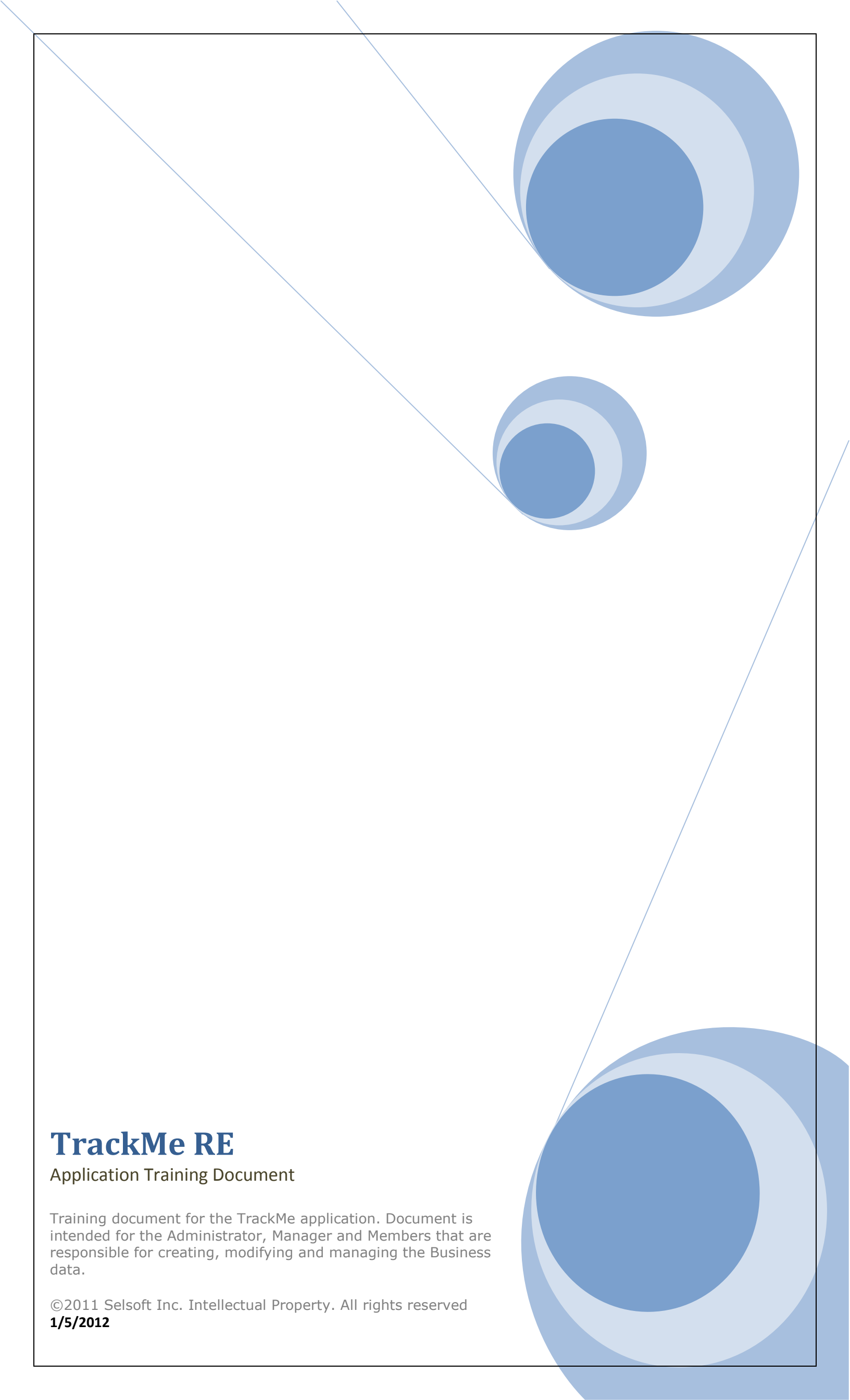


A decorative graphic featuring three blue circles of varying sizes (two large, one medium) and two thin blue lines crossing the page diagonally. The circles are composed of concentric rings of different shades of blue.

TrackMe RE

Application Training Document

Training document for the TrackMe application. Document is intended for the Administrator, Manager and Members that are responsible for creating, modifying and managing the Business data.

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1/5/2012

Disclaimer:

Deleting any Data record from any TAB for this application is strictly prohibited. Deleting any entry will result in data corruption. Selsoft or any party selling the TrackMe RE Software will not be held responsible for data loss or data corruption. It is the User of the TrackMe application responsibility to ensure that proper privilege is granted to its application users.

Action Item for System Administrator:

Only the system administrator must have the permission to delete any entries in this application. All other users of this application must not have an option to delete any entries. Please ensure that the “Delete” option is not selected for any tab associated with TrackMe RE application in the Profile. Please refer to the Profile Setup requirement for this Application.

Selsoft has created three sample profiles for this application that will minimize the risk of data corruption as a result of deleting records from the application.

- a. **TrackMe Administrator1:**
Profile has all the necessary privilege required to manage the application data security. No Delete privilege exists for this profile.
- b. **TrackMe Property Manager User1:**
Profile is created for Property Managers. Certain Master records will be considered as Out of scope for this profile. Users of this profile must contact the TrackMe Administrator to create or edit master records. Team Leads and higher management can be given access using this profile. No Delete Privilege exists for this profile.
- c. **TrackMe Member User1:**
Profile is created for Members or the general users of this application. Crew members that will perform the actual work on the TrackMe Case must be given access via this profile. No Delete Privilege exists for this profile.

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1. TrackMe Setup Menu

Define and identify the necessary Setup required by the application to manage the private and commercial Property Location. It also provides ability to combine various elements of the Property Location Case Management system.

TrackMe Search	Dashboards	TrackMe Setup	TrackMeMaintenanceSetup	TrackMeFinancials	TrackMe Site Page	TrackMe Users	+
TrackMe S E T U P							
▼ Property Location and Units Management							
Property Location & Units			CREATE and MODIFY location information related to each property.				
▼ Tenant Management							
Tenant			CREATE and MODIFY personal information related to each Tenant.				
▼ Lease, Lease Charges, and, Lessee Management							
Lease Agreement			CREATE and MODIFY Lease agreement between the Property Location and Tenants. Setup Property Charges related to Rents, Utility, and, Deposit.				
▼ Department and Team Management							
Departments & Teams			CREATE and MODIFY information related to each Department, and, its associated Team for Specific Property Location.				
▼ Case Category Management							
Case Category			CREATE and MODIFY information related to the category defined for each case. Case category will help in grouping the cases and assigning it to appropriate department.				
▼ Business Flow Management							
Business Flow			CREATE and MODIFY information related to the flow of the case between departments based on the Case Category and Case Status. CASES new and existing will be auto assigned to the Department (Location Specific or Global) based on the Case Category and Case Status.				
▼ Priority and SLA Management							
Priority and SLA			CREATE and MODIFY information related to Priority and its Service Level time line. Priority can be defined at Case level and Department Level. In case, if the CASE having the defined priority is not resolved in the defined timeframe then a SLA Violation will be created and published on the Dashboard.				
▼ Department Users Mapping							
Deptartment User Mapping			View the TrackMe Users that are assigned to Department.				
▼ Standard Response for Tenant							
Tenant Response			Create and Modify information related to the Message that you wish to communicate with your Tenant. Data from this object is used to communicate Case Status to Tenants.				

1.1 LOCATION and UNIT

Define and identify the private and commercial Property Location. In case if Location is not available than we recommend creating a dummy location for this application because it is a key requirement for this application. The Application is designed to work around Property Locations. Each Location is then subdivided into multiple Units. At least one Unit must be defined for a property Location.

1.1.1 PROPERTY LOCATION

Create New or Edit Existing Location:

Select the menu option “Property Location” from the “TrackMeSetup” Tab.

- **“New Location”**: Select the button “New Location” from the Location List Screen.
- **“Edit”**: Select “Edit” next to the existing Location listed under the “Action” column on the Location List Screen.
- **“View”**: Select the specific entry listed under the “Location ID” column.

▼ Property Location and Units Management

Property Location & Units

CREATE and MODIFY location information related to each property.

TrackMe Search Dashboards TrackMeSetup TrackMeMaintenanceSetup TrackMeFinancials TrackMe Site Page TrackMe Users +

All Edit Delete Create New View

New Location Change Owner

Action	Location ID	Location Name	Address_Line_1	Address_Line_2	City	State	Zip Code	Expiration Date	Total Number of Units	Total Square Footage	Vacant Units	Occupied Un...	Unavailable Units
Edit Del	L-0891	Continental Palace	100 Main Street		Dallas	TX	75234		2	600.000000	1	1	0
Edit Del	L-0892	Plaza Tower	300 South LakeVie...		Chicago	IL	61001		2	3,720.000000	1	1	0
Edit Del	L-0892	Plaza place	123 Main street		Dallas	TX	75123		1	25,000.000000	1	0	0
Edit Del	L-0983	Sample Location	100 Demo Lane		Dallas	TX	75094		2	20,000.000000	2	0	0

TrackMe Search Dashboards TrackMeSetup TrackMeMaintenanceSetup TrackMeFin

Location Edit L-0983

Location Edit

Save Save & New Cancel

Information

Location ID L-0983 Owner Behmen Sanjana

Location Address Detail

Location Name Sample Location

Address_Line_1 100 Demo Lane

Address_Line_2

City Dallas

State TX

Zip Code 75094

Expiration Date 1/26/2012 3:41 PM

EDIT SCREEN to change the Location Name and its Address. Caution: Expiration date if populated will remove the Location from being displayed at selection time.

Save Save & New Cancel

TrackMe Search Dashboards TrackMeSetup TrackMeMaintenanceSetup

Location Edit New Location

Location Edit

Save Save & New Cancel

Information

Owner Behmen Sanjana

Location Address Detail

Location Name

Address_Line_1

Address_Line_2

City

State

Zip Code

Expiration Date 1/26/2012 3:39 PM

Enter a new Location Name and its Address. All fields that has the "RED" bar are mandatory and will require some information. Note: Expiration date is not mandatory so please dont populate it with any value.

Save Save & New Cancel

TrackMe Search Dashboards TrackMeSetup TrackMeMaintenanceSetup TrackMeFinancials TrackMe Site Page TrackMe Users +

Location L-0983

Details Related Departments Expense Details Income Details Notes and Attachments Equipment List Equipment Maint. Records Case List Broadcast Message Old Maint. History Change Log

Location Detail

Location ID L-0983 Owner Behmen Sanjana Change

Total Number of Units 2

Vacant Units 2

Occupied Units 0

Unavailable Units 0

Total Square Footage 20,000.000000

Vacant Square Footage 20,000.000000

Occupied Square Footage 0.000000

Unavailable Square Footage 0.000000

Created By Behmen Sanjana 1/11/2012 4:17 PM

Last Modified By Behmen Sanjana 1/11/2012 4:18 PM

Location Address Detail

Location Name Sample Location

Address_Line_1 100 Demo Lane

Address_Line_2

City Dallas

State TX

Zip Code 75094

Expiration Date

Each Location must have individual units assigned in order for it to be Effective & Active. We will explore creating new unit entries in the next slide.

UNITS

New UNITS

Action	UNIT# ID	Unit Name	Unit Status	Square Footage	Rate Per Sq Foot	Total Unit Price	Primary Owner
Edit Del	U-0000000085	Suite 100	VACANT	10,000.000000	\$25.00	\$250,000.00	Demo Name
Edit Del	U-0000000086	Suite 200	VACANT	10,000.000000	\$100.00	\$1,000,000.00	Demo Name 02

View Existing Location:

To “View” the details of an existing Location, select the tab “Property Location” from the “TrackMeSetup” tab. To view, select the specific location from the Location List. Once the Entry is displayed on the View screen, you can select various attached TAB’s to display multiple details about this location. Using the below interface, you can View the Property Location and its associated components.

	All	Edit	Delete	Create New View		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	Other	All
					New Location	Change Owner																											
					Address	Location ID #	Location Name	Address Line 1	Address Line 2	City	State	Zip Code	Expiration Date	Total Number of Units	Total Square Footage	Variant Units	Occupied Units																
					Edit Del	L-0691	Continental Palace	100 Main Street		Dallas	TX	75234		2	600.000000	1	1																
					Edit Del	L-0692	Plaza Tower	300 South LakeView...		Chicago	IL	60601		1	3,720.000000	1	1																
					Edit Del	L-0693	Plaza Tower	123 Main street		Dallas	TX	75123		1	25.000.000000	1	0																
					Edit Del	L-0693	Sample Location	100 Demo Lane		Dallas	TX	75094		2	20,000.000000	2	0																

TrackMe Search Dashboards TrackMeSetup TrackMeMaintenanceSetup TrackMeFinancials TrackMe Site Page TrackMeUsers +

Location L-0691 View of the Selected LOCATION detail. There are various TABS that hold valuable information that are connected to this specific location.

Details Related Departments Expense Details Income Details Notes and Attachments Equipment List Equipment Maint. Records Case List Broadcast Message Old Maint. History Change Log

Location Detail

Location ID: L-0691 Edit Clone Back to Previous Page Go to List

Owner: Benhem Sanjana (Chicago)

Total Number of Units: 2
Variant Units: 1
Occupied Units: 1
Unoccupied Units: 0

Total Square Footage: 600.000000
Variant Square Footage: 250.000000
Occupied Square Footage: 350.000000
Unoccupied Square Footage: 0.000000

Created By: Benhem Sanjana 12/11/2011 1:10 AM Last Modified By: Benhem Sanjana 12/20/2011 2:15 PM

Location Address Detail

Location Name: Continental Palace
Address Line 1: 100 Main Street
Address Line 2:
City: Dallas
State: TX
Zip Code: 75234
Expiration Date:

Edit Clone Back to Previous Page Go to List

UNITS

(New UNIT S)

Action	UNIT ID	Unit Name	Unit Status	Square Footage	Rent Per Sq Foot	Total Unit Price	Primary Owner
Edit Del	L000000000002	CP-002	OCCUPIED	250.000000	\$5.00	\$12,500.00	Sobby Jackson
Edit Del	L000000000005	CP-001	VACANT	250.000000	\$80.00	\$15,000.00	Michael Ranch

List of all the Departments or Group that are associated with this Specific Location. Global department that are not tied to any specific location are not visible here.

Customize Page Printable View Help for this Page

Details Related Departments Expense Details Income Details Notes and Attachments Equipment List Equipment Maint. Records Case List Broadcast Message Old Maint. History Change Log

Departments

(New Department)

Action	Department Name	Location Description	Primary Owner/Manager	Default Dept Assign for New Cases	Secondary Owner/Manager	Expiration Date
Edit Del	General All Case Local	Dallas,TX,75234,100 Main Street,	Benhem Sanjana	✓		

List of all the EXPENSE (Accounts Payable) related to this specific LOCATION is listed in this TAB.

Customize Page Printable View Help for this Page

Details Related Departments Expense Details Income Details Notes and Attachments Equipment List Equipment Maint. Records Case List Broadcast Message Old Maint. History Change Log

Account Payable

(New Account Payable)

Action	Expense ID	Invoice Number	Invoice Issued	Invoice Due Date	Total Invoice Amount	Total Amount Paid	Outstanding Balance	Expense Status	Unit Name	
Edit Del	AP000000000008	WG12345	Wal-Mart Inc.	12/23/2011 11:25 AM	1/22/2012 11:25 AM	\$14.65	\$0.00	\$14.65	Past-Due	CP-002

List of all INCOME (Accounts Receivable) related to this specific LOCATION is listed in this TAB. Income for this location is created from RENT collection.

Customize Page Printable View Help for this Page

Details Related Departments Expense Details Income Details Notes and Attachments Equipment List Equipment Maint. Records Case List Broadcast Message Old Maint. History Change Log

Account Receivable

(New Account Receivable)

Action	Art ID	Description	Bill Date	Payment Due Date	Total Bill Amount	Total Outstanding Balance	Total Payment Received	Collection Status	Unit Name
Edit Del	AR000000000004	Scheduled Billing based on Lease Charges.: Basic Rent = 1200.00	12/11/2011 1:00 PM	1/10/2012 1:00 PM	\$1,200.00	\$1,200.00	\$0.00	Past-Due	CP-002
Edit Del	AR000000000014	Scheduled Billing based on Lease Charges.: Basic Rent = 1200.00	12/19/2011 1:00 PM	1/18/2012 1:00 PM	\$1,200.00	\$1,200.00	\$0.00	Past-Due	CP-002
Edit Del	AR000000000018	Scheduled Billing based on Lease Charges.: Basic Rent = 1200.00	12/27/2011 1:00 PM	1/26/2012 1:00 PM	\$1,200.00	\$1,200.00	\$0.00	Past-Due	CP-002
Edit Del	AR000000000020	Scheduled Billing based on Lease Charges.: Basic Rent = 1200.00	1/4/2012 1:00 PM	2/3/2012 1:00 PM	\$1,200.00	\$1,200.00	\$0.00	Zero Payments Received	CP-002

List of all the Notes and Attachments related to this LOCATION. You can add special notes pertaining to this Property Location or can store valuable documents like the floor plan for this property.

Customize Page Printable View Help for this Page

Details Related Departments Expense Details Income Details Notes and Attachments Equipment List Equipment Maint. Records Case List Broadcast Message Old Maint. History Change Log

Notes & Attachments

(New Note) Attach File

No records to display

List of all the Equipment that are associated with this LOCATION.

Customize Page Printable View Help for this Page

Details Related Departments Expense Details Income Details Notes and Attachments Equipment List Equipment Maint. Records Case List Broadcast Message Old Maint. History Change Log

Barcode

(New Barcode/Equipment Inventory)

Action	Barcode/Equipment Inventory Name	Barcode/Inventory ID	Additional Inventory ID/SUB ID	Address	City	State	Zip Code	Equipment Description
Edit Del	MR00000388	99923456789	10-001	100 Main Street,	Dallas	TX	75234	Generator 7500x
Edit Del	MR00000497	1110927684321	East-001	100 Main Street,	Dallas	TX	75234	Generator 7500x
Edit Del	MR00000498	1119876843210	East-002	100 Main Street,	Dallas	TX	75234	Generator 7500x

List of all the Schedule Maintenance Records that are setup for this LOCATION. It provides a glimpse of all the Maintenance activity that are planned and performed at this specific LOCATION.

Customize Page Printable View Help for this Page

Details Related Departments Expense Details Income Details Notes and Attachments Equipment List Equipment Maint. Records Case List Broadcast Message Old Maint. History Change Log

Maintenance

(New Maintenance)

Delete Existing Location: We do not recommend “delete” of any existing location.

1.1.2 UNITS

Create New or Edit Existing UNITS under a Property Location:

Select the menu option “Property Location” from the “TrackMeSetup” Tab. Select the Location of the Property by selecting the LOCATION ID. From the LOCATION DETAIL screen, select the appropriate options to manipulate the UNITS under this location.

- “New Unit”: Select the button “New Units” in the UNITS SECTION from LOCATION DETAIL Screen.
- “Edit”: Select “Edit” next to the existing UNIT listed under the “Action” column on the Location List Screen.
- “View”: Select the specific entry listed under the “UNITS ID” column.

TrackMe SearchDashboardsTrackMeSetupTrackMeMaintenanceSetupTrackMeFinancialsTrackMe Site PageTrackMe Users

Location
L-0983

Customize Page | Printable View | Help for this Page

DetailsRelated DepartmentsExpense DetailsIncome DetailsNotes and AttachmentsEquipment ListEquipment Maint. RecordsCase ListBroadcast MessageOld Maint. HistoryChange Log

Location Detail

Location ID: L-0983Owner: Behmen Sanjana

Total Number of Units: 2

Vacant Units: 2

Occupied Units: 0

Unavailable Units: 0

Total Square Footage: 20,000.000000

Vacant Square Footage: 20,000.000000

Occupied Square Footage: 0.000000

Unavailable Square Footage: 0.000000

Created By: Behmen Sanjana, 1/11/2012 4:17 PMLast Modified By: Behmen Sanjana, 1/11/2012 4:18 PM

Location Address Detail

Location Name: Sample Location

Address_Line_1: 100 Demo Lane

Address_Line_2:

City: Dallas

State: TX

Zip Code: 75094

Expiration Date:

UNITS

New UNITS

Action	UNIT'S ID	Unit Name	Unit Status	Square Footage	Rate Per Sq Foot	Total Unit Price	Primary Owner
Edit Del	U-0000000085	Suite 100	VACANT	10,000.000000	\$25.00	\$250,000.00	Demo Name
Edit Del	U-0000000086	Suite 200	VACANT	10,000.000000	\$100.00	\$1,000,000.00	Demo Name 02

TrackMe SearchDashboardsTrackMeSetupTrackMeMaintenanceSetupTrackMeFinancialsTrackMe Site Page

UNIT'S Edit
U-0000000085

Help for this Page

UNIT'S Edit

SaveSave & NewCancel

Information

UNIT'S ID: U-0000000085Location_ID: L-0983

Unit Name: Suite 100Primary Owner: Demo Name

Unit Status: VACANT

Square Footage: 10,000.000000

Rate Per Sq Foot: 25.00

Unit Name, Primary Owner, and Square Footage are Mandatory fields. You can leave the Unit Status as "Vacant". When Lease is created and it is active then this field will change to "Occupied".

SaveSave & NewCancel

TrackMe SearchDashboardsTrackMeSetupTrackMeMaintenanceSetupTrackMeFinancialsTrackMe Site Page

UNIT'S Edit
New UNITS

Help for this Page

UNIT'S Edit

SaveSave & NewCancel

Information

Unit Name: Location_ID: L-0983

Unit Status: VACANTPrimary Owner:

Square Footage: Rate Per Sq Foot:

Primary Owner is the Name of the Unit Owner. Information in this field will be used for reporting purpose. It is a Mandatory field.

SaveSave & NewCancel

TrackMe SearchDashboardsTrackMeSetupTrackMeMaintenanceSetupTrackMeFinancialsTrackMe Site Page

UNIT'S Detail
U-0000000085

Customize Page | Printable View | Help for this Page

UNIT'S Detail

EditDeleteCloneBack to LOCATION

Information

UNIT'S ID: U-0000000085Location_ID: L-0983

Unit Name: Suite 100Location Name: Sample Location

Unit Status: VACANTLocation Address: 100 Demo Lane, Dallas, TX, 75094

Square Footage: 10,000.000000Primary Owner: Demo Name

Rate Per Sq Foot: \$25.00

Total Unit Price: \$250,000.00

Created By: Behmen Sanjana, 1/11/2012 4:17 PM

Last Modified By: Behmen Sanjana, 1/11/2012 4:17 PM

EditDeleteCloneBack to LOCATION

Lease

New Lease

No records to display

Lease can be created from Units or by selecting the menu option "Lease" from "TrackMe Setup" Menu.

View Existing UNITS under the Property Location:

To “View” the details of an existing UNIT, select the tab “Property Location” from the “TrackMeSetup” tab. View the Location Details by selecting the specific location from the Location List. After the LOCATION Entry is displayed on the View screen, select the appropriate UNIT ID from the list displayed in the UNITS SECTION. On the UNITS DETAIL SCREEN, select various attached TAB’s to display more details about this UNIT. Using the below interface, you can View the UNIT details and its associated components.

UNITS							
New UNITS							
Action	UNIT ID	Unit Name	Unit Status	Square Footage	Rate Per Sq Foot	Total Unit Price	Primary Owner
Edit Del	U-0000000085	Suite 100	VACANT	10,000.000000	\$25.00	\$250,000.00	Demo Name
Edit Del	U-0000000088	Suite 200	VACANT	10,000.000000	\$100.00	\$1,000,000.00	Demo Name 02

TrackMe Search | Dashboards | TrackMe Setup | TrackMe Maintenance Setup | TrackMe Financials | TrackMe Site Pa

UNIT ID: U-0000000085

Customize Page | Printable View | Help for this Page

Details | Expense Detail | Income Detail | Notes and Attachments | Change Log

UNIT'S Detail

UNIT'S ID: U-0000000085

Unit Name: Suite 100

Unit Status: VACANT

Square Footage: 10,000.000000

Rate Per Sq Foot: \$25.00

Total Unit Price: \$250,000.00

Location ID: L-0883

Location Name: Sample Location

Location Address: 100 Demo Lane,Dallas,TX,75094

Primary Owner: Demo Name

Created by: Behmen Sanjani, 1/11/2012 4:17 PM

Last Modified by: Behmen Sanjani, 1/11/2012 4:17 PM

Edit | Delete | Clone | Back to LOCATION

Lease

New Lease

No records to display

UNIT ID: U-0000000085

Details about any Expense incurred for this UNIT. [Account Payable]

Customize Page | Printable View | Help for this Page

Details | Expense Detail | Income Detail | Notes and Attachments | Change Log

Account Payable

New Account Payable

Action	Expense ID	Description	Expense Status	Invoice Date	Invoice Due Date	Invoice Issued	Invoice Number	Outstanding Balance	Total Amount Paid	Total Invoice Amount
Edit Del	AE-000000000003	Repainted the Unit.	Zero Payments Made	1/26/2012 4:16 PM	2/25/2012 4:16 PM	Monaco Paint, LLC	124878	\$2,500.00	\$0.00	\$2,500.00

UNIT ID: U-0000000085

Details about any Income received for this UNIT. [Account Receivable]

Customize Page | Printable View | Help for this Page

Details | Expense Detail | Income Detail | Notes and Attachments | Change Log

Account Receivable

New Account Receivable

Action	Alt ID	Description	Bill Date	Payment Due Date	Total Bill Amount	Total Outstanding Balance	Total Payment Received
Edit Del	AR-000000000002	Demo Income	1/26/2012 4:21 PM	1/27/2012 4:21 PM	\$25.00	\$25.00	\$0.00

UNIT ID: U-0000000085

Special Instruction can be documented by using the Notes and Attachments. Floor Plan layouts can be attached to the Units for future reference.

Customize Page | Printable View | Help for this Page

Details | Expense Detail | Income Detail | Notes and Attachments | Change Log

Notes & Attachments

New Note | Attach File | View All

Action	Type	Title	Last Modified	Created By
Edit Del	Note	Property Rental Details	1/26/2012 4:24 PM	Behmen Sanjani

UNIT ID: U-0000000085

Change control or Audit Trail for the Units.

Customize Page | Printable View | Help for this Page

Details | Expense Detail | Income Detail | Notes and Attachments | Change Log

Date	Change	From	To	By
1/11/2012 4:17 PM	Name		U-0000000085	Behmen Sanjani
1/11/2012 4:17 PM	created			Behmen Sanjani

1.2 CASE CATEGORY or REQUEST TYPE

Define and identify the type of issues reported by the User community. Details present in this tab will be used by the end user that is creating the TrackMe Case to select the type or category for the issue.

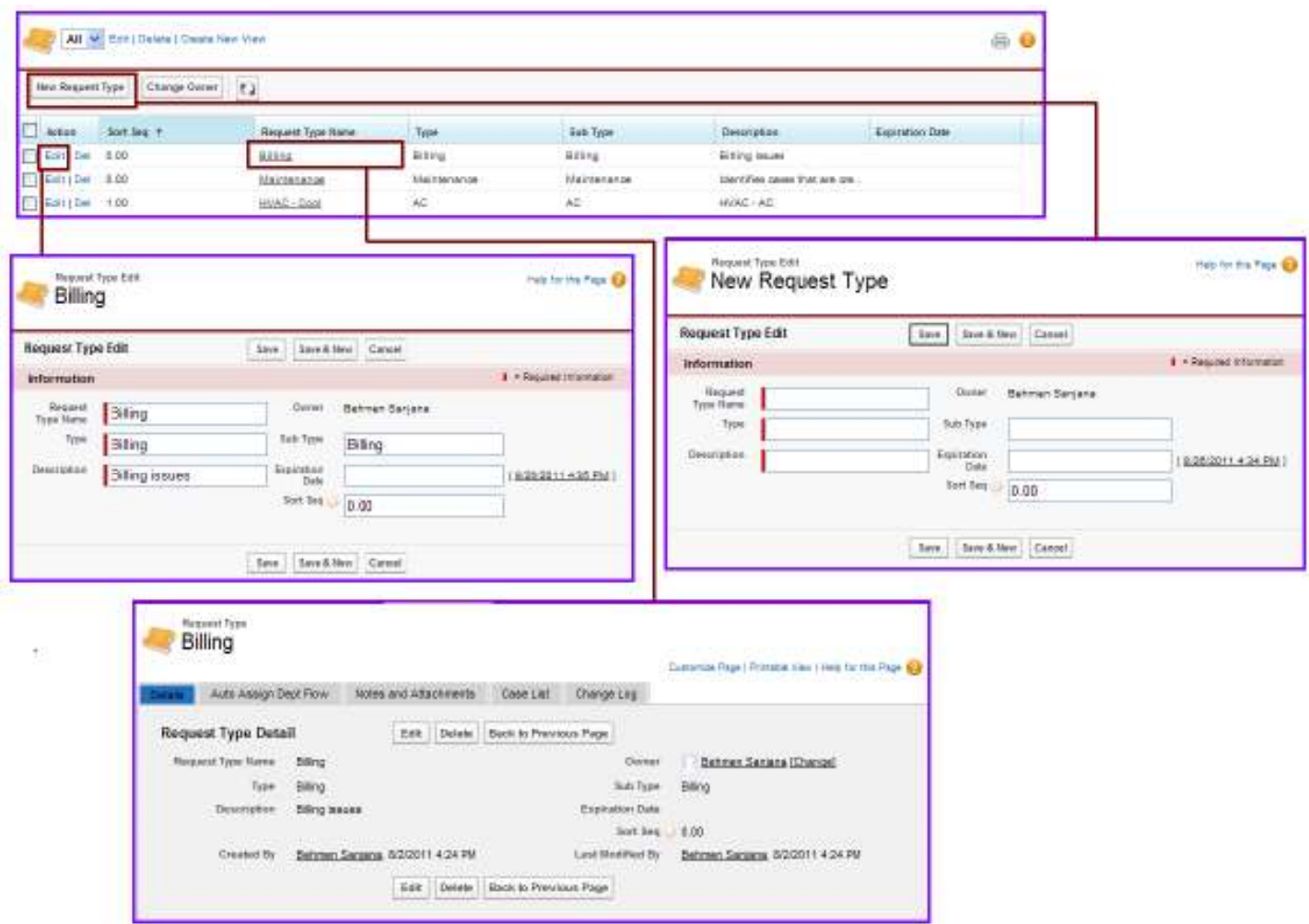
Sample Request types are:

a.	HVAC-HOT	b.	HVAC-COLD
c.	Plumbing	d.	Power/Electrical
e.	Parking lot	f.	Light
g.	Security	h.	Flooring
i.	Restroom	j.	Break room
k.	Windows/Doors	l.	Others

Create New and Edit Existing Case Category / Request Type:

Select the menu option “Case Category” from the “TrackMeSetup” Tab.

- **“New Request-type”**: Select the button “New Request Type” from the Request-Type List Screen.
- **“Edit”**: Select “Edit” next to the existing Request-type or Case Category in the Request-Type List Screen.
- **“View”**: Select the specific entry listed under the “Request-Type Name” column.



Note: The SORT-SEQ field is used for displaying the entries in the drop down list for Request-type. If all the entries have 0.00 as the SORT-SEQ then the entries will be sorted in alphabetical order of Request-Type-Name field. Hence if you wish that the Request-type “Other” should be displayed at the bottom of this Request-type pick-list then populate the number that is higher than rest of the records. Records will be sorted in ascending order of the numerical sequence defined in this field.

View Existing Request-type:

To “View” the details of an existing Case Category / Request-Type, select the option “Case Category” from the “TrackMeSetup” tab. To view, select the specific Case Category from the Request-type list. Once the Entry is displayed on the View screen, you can select various attached TAB’s to display multiple details about this location. Using the below interface, you can View the Case Category / Request-Type and its associated components.

Action	Sort Seq ↑	Request Type Name	Type	Sub Type	Description	Expiration Date
Edit Del	0.00	Billing	Billing	Billing	Billing issues	
Edit Del	0.00	Maintenance	Maintenance	Maintenance	Identifies cases that are...	
Edit Del	1.00	HVAC - Cool	AC	AC	HVAC - AC	

Request Type Details about the CASE TYPE Billing.

Billing

Customize Page | Printable View | Help for this Page ?

Details Auto Assign Dept Flow Notes and Attachments Case List Change Log

Request Type Detail Edit Delete Back to Previous Page

Request Type Name: Billing Owner: Behmen Sanjana [Change]

Type: Billing Sub Type: Billing

Description: Billing issues Expiration Date:

Sort Seq: 0.00

Created By: Behmen Sanjana, 8/2/2011 4:24 PM Last Modified By: Behmen Sanjana, 8/2/2011 4:24 PM

Edit Delete Back to Previous Page

Request Type Billing Automated case assignment, if defined for this CASE Type then it will be listed below. What department should a TrackMe Case be assigned is listed below.

Customize Page | Printable View | Help for this Page ?

Details Auto Assign Dept Flow Notes and Attachments Case List Change Log

Business Flows New Business Flow

Action	Business Flow Name	Description	Location	Location Description	Effective Date	Expiration Date
Edit Del	Billing - Local	Auto assign the Billing issue for Murphy	L-0112	Murphy,TX,75094-4338,833 Morningside Trl,	8/10/2011 5:06 PM	

Request Type Billing Information related to this CASE TYPE can be stored here.

Customize Page | Printable View | Help for this Page ?

Details Auto Assign Dept Flow Notes and Attachments Case List Change Log

Notes & Attachments New Note Attach File View All

Action	Type	Title	Last Modified	Created By
Edit Del	Note	What should be assigned to this Case Type?	8/26/2011 4:47 PM	Behmen Sanjana

Request Type Billing All cases in all status that are assigned to this CASE TYPE billing are listed here.

Customize Page | Printable View | Help for this Page ?

Details Auto Assign Dept Flow Notes and Attachments Case List Change Log

TrackMeCases New TrackMeCase

Action	Case Number	Description	Priority	Status	Department Assigned	Created Date	State	City	Address
Edit Del	Q-00630	Incorrect Bill amount	Low	Assigned	Finance - Local	8/2/2011	TX	Murphy	833 Morningside Trl.,
Edit Del	Q-00632	abcdefgh		Assigned	Billing - Local - Murphy	8/16/2011	TX	Murphy	833 Morningside Trl.,
Edit Del	Q-00633	abcdefgh		Assigned	Billing - Local - Murphy	8/16/2011	TX	Murphy	833 Morningside Trl.,
Edit Del	Q-00634	abcdefghijklmnopqrstuvwxyx		Assigned	Billing - Local - Murphy	8/16/2011	TX	Murphy	833 Morningside Trl.,
Edit Del	Q-00635	This is my 3rd attempt		Assigned	Billing - Local - Murphy	8/16/2011	TX	Murphy	833 Morningside Trl.,

Show 5 more » | Go to list (16) »

Request Type Billing Change Log keeps track of all changes done to this record for audit purpose.

Customize Page | Printable View | Help for this Page ?

Details Auto Assign Dept Flow Notes and Attachments Case List Change Log

Date	Change	From	To	By
8/26/2011 4:49 PM	Sort_Seq__c	0.0	0.5	Behmen Sanjana
8/2/2011 4:24 PM	created			Behmen Sanjana

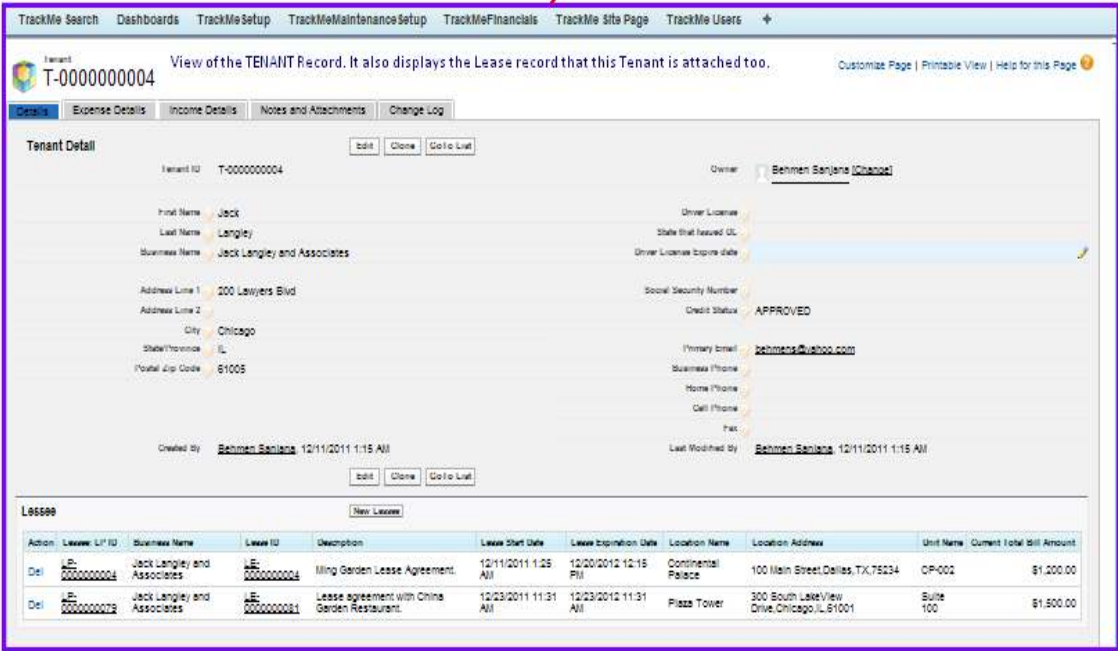
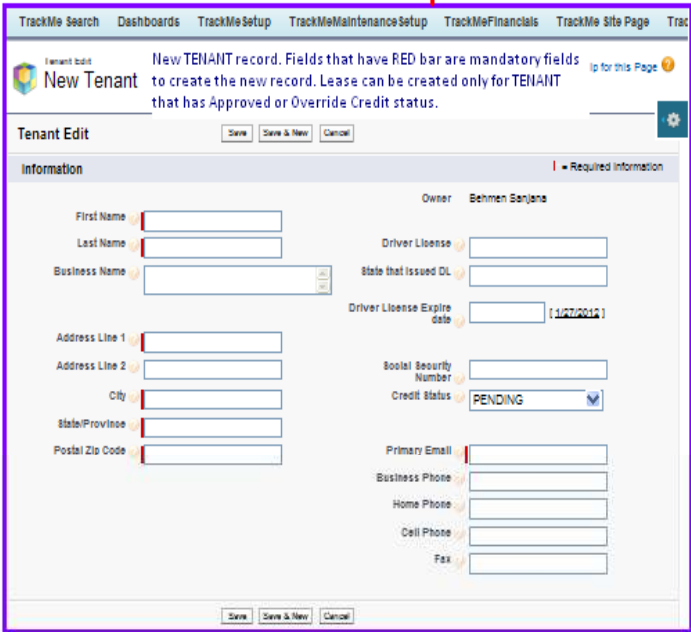
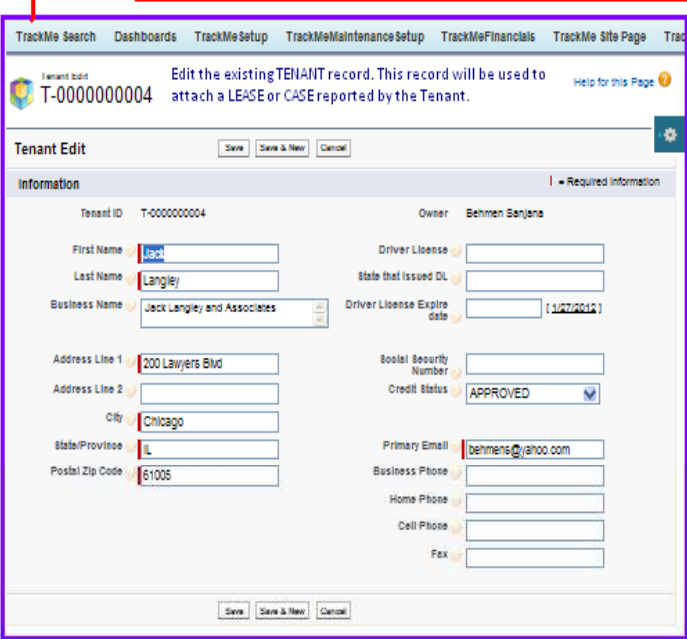
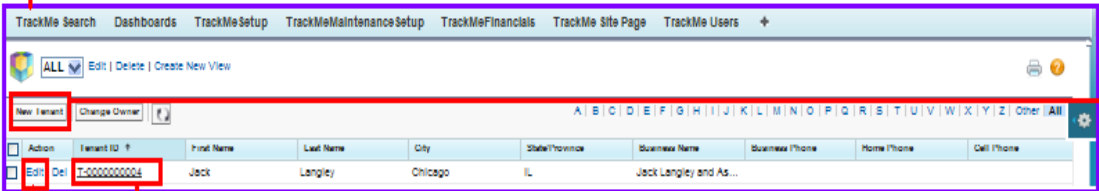
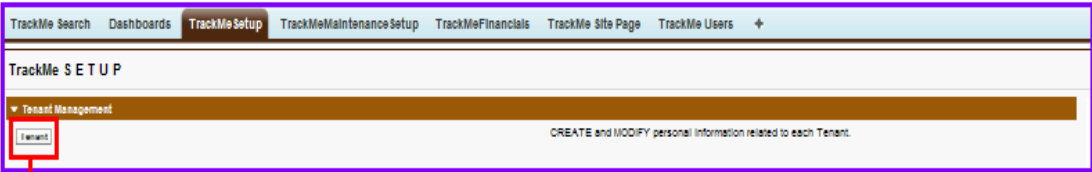
1.3 TENANT

Capture existing and potential new Tenant (clients) information with this option. This is to ensure that various elements like the TrackMe Cases, Expenses, Income, and Lease are connected to the Tenant record. Also maintaining a record about the Tenant will provide valuable information about your cliental base.

Create New or Edit Existing Tenant:

Select the menu option “Tenant” from the “TrackMeSetup” Tab.

- **“New Tenant”**: Select the button “New Tenant” from the Tenant List Screen.
- **“Edit”**: Select “Edit” next to the existing Tenant in the Tenant List Screen.
- **“View”**: Select the specific entry listed under the “Tenant ID” column.



View Existing Tenant:

Select menu option “Tenant” from the “TrackMeSetup” tab.

“View”: Select the Tenant listed under the Tenant-ID Column on the List Screen. You can maneuver over the various TABs to view more details about its associated components.

TrackMe Search

Dashboards

TrackMeSetup

TrackMeMaintenanceSetup

TrackMeFinancials

TrackMe Site Page

TrackMe Users

ALL

Edit | Delete | Create New View

New Tenant

Change Owner

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

ALL

☐ Action

Tenant ID

Print Name

Last Name

City

State/Province

Business Name

Business Phone

Home Phone

Cell Phone

☐ Edit | Del

T-0000000004

Jack

Langley

Chicago

IL

Jack Langley and As...

Tenant

T-0000000004

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Tenant Detail

Edit

Clone

Go to List

Tenant ID

T-0000000004

Owner

Behmen Sanjani

Change

Print Name

Jack

Owner License

Last Name

Langley

State that issued DL

Business Name

Jack Langley and Associates

Owner License Expiry date

Address Line 1

200 Lawyers Blvd

Social Security Number

Address Line 2

Credit Status

APPROVED

City

Chicago

Primary Email

bsanjani@yahoo.com

State/Province

IL

Business Phone

Postal Zip Code

61005

Home Phone

Cell Phone

Fax

Created By

Behmen Sanjani

12/11/2011 1:15 AM

Last Modified By

Behmen Sanjani

12/11/2011 1:15 AM

Edit

Clone

Go to List

Lessee

New Lessee

Action	Lessee ID	Business Name	Lease ID	Description	Lease Start Date	Lease Expiration Date	Location Name	Location Address	Unit Name	Current Total Bill Amount
Del	LE: 0000000004	Jack Langley and Associates	LE: 0000000004	Ming Garden Lease Agreement.	12/11/2011 1:25 AM	12/20/2012 12:15 PM	Continental Palace	100 Main Street,Dallas,TX,75234	CP-002	\$1,200.00
Del	LE: 0000000029	Jack Langley and Associates	LE: 0000000031	Lease agreement with China Garden Restaurant.	12/23/2011 11:31 AM	12/23/2012 11:31 AM	Plaza Tower	300 South LakeView Drive,Chicago,IL,61001	Suite 100	\$1,500.00

Tenant

T-0000000004

List of all the EXPENSES incurred for this Tenant.

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Account Payable

New Account Payable

Action	Expense ID	Description	Expense Status	Invoice Date	Invoice Due Date	Invoice Issuer	Invoice Number	Outstanding Balance	Total Amount Paid	Total Invoice Amount
Edit Del	AP: 0000000002	FEDEX charges for shipping the documents for Lease.	Zero Payments Made	1/27/2012 1:32 PM	2/26/2012 1:32 PM	Fedex	12354	\$47.92	\$0.00	\$47.92

Tenant

T-0000000004

List of all the INCOME that we have to collect from the Tenant.

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Account Receivable

New Account Receivable

Action	AR ID	Description	Bill Date	Payment Due Date	Total Bill Amount	Total Outstanding Balance	Total Payment Received
Edit Del	AR:00000000023	Credit Application processing fee	1/27/2012 1:39 PM	1/27/2012 1:39 PM	\$125.00	\$125.00	\$0.00

Tenant

T-0000000004

List of Notes and Attachment associated with this TENANT.

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Notes & Attachments

New Note | Attach File

No records to display

Tenant

T-0000000004

List of Audit Trail or recording of any changes made to the Tenant Record.

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Date	Change	From	To	By
12/11/2011 1:15 AM	trackme_RE__Credit_Status__c	PENDING	APPROVED	Behmen Sanjani
12/11/2011 1:15 AM	Name		T-0000000004	Behmen Sanjani
12/11/2011 1:15 AM	created			Behmen Sanjani

1.4 LEASE

LEASE Agreements are made with a combination of LOCATION, UNITS, and LESSEE (Tenants). This element also helps in creating individual LEASE CHARGES for each LEASE. Once the Charges are created and the Lease is Active, then you have an option to generate ACCOUNTS RECEIVABLE transactions (Income Transaction) for the Total lease charge amount on a periodic basis.

Create New or Edit Existing Lease:

Select the menu option “Lease” from the “TrackMeSetup” Tab.

- **“New Lease”**: Select the button “New Lease” from the Lease List Screen.
- **“Edit”**: Select “Edit” next to the existing Lease in the Lease List Screen.
- **“View”**: Select the specific entry listed under the “Lease ID” column.

TrackMe Search Dashboards **TrackMe Setup** TrackMeMaintenanceSetup TrackMeFinancials TrackMe Site Page TrackMe Users +

TrackMe S E T U P

Lease, Lease Chargo, and, Lessee Management

Lease Agreement

CREATE and MODIFY Lease agreement between the Property Location and Tenants. Setup Property Charges related to Rents, Utility, and Deposit.

TrackMe Search Dashboards **TrackMe Setup** TrackMeMaintenanceSetup TrackMeFinancials TrackMe Site Page TrackMe Users +

ALL Edit Delete Create New View

New Lease

Action	Lease ID #	Lease Title	Description	Lease Start Date	Lease Expiration Date	Location Name	Unit Name	Rent Schedule	Lease Status
Edit Del	LE-0000000004	Ming Garden	Ming Garden Lease...	12/11/2011 1:25 AM	12/20/2012 12:15 PM	Continental Palace	CP-002	WEEKLY	ACTIVE
Edit Del	LE-00000000031	China Garden	Lease agreement with...	12/23/2011 11:31 AM	12/23/2012 11:31 AM	Pizza Tower	Suite 100	WEEKLY	ACTIVE

Lease Edit

LE-0000000004

Lease Information

Lease ID: LE-0000000004

Location: L-0001

UNITS: U-0000000007

Lease Title: Ming Garden

Description: Ming Garden Lease Agreement

Lease Terms Details

Lease Start Date: 12/11/2011 1:25 AM

Lease Expiration Date: 12/20/2012 12:15 PM

Rent Schedule: WEEKLY

Days Bill/Payments Due: 30

Lease Status: ACTIVE

Bill Mode: Auto

Create Bill Now

Create BILAR ASAP

Indicator that will create the Charge record ASAP.

Lease New

New LEASE Agreement. Here you select the LOCATION and the UNIT for which this Agreement is for.

Lease Information

Lease ID: Click lookup icon...

Location: Click lookup icon...

UNITS: Click lookup icon...

Lease Title:

Description:

Lease Terms Details

Lease Start Date: 1/27/2012 1:58 PM

Lease Expiration Date: 1/27/2012 1:58 PM

Rent Schedule: MONTHLY

Days Bill/Payments Due: 30

Lease Status: INACTIVE

Bill Mode: Manual

Lease LE-0000000004

View of the LEASE Record. You will have to Assign the Tenant to the LESSEE section, and, Create Lease Charges for Rent, Utility, General Expense... Things that you want to charge your tenant on a recurring or one-time basis.

Details Expense Details Income Details Notes and Attachments Change Log

Lease Detail

Lease ID: LE-0000000004

Lease Title: Ming Garden

Description: Ming Garden Lease Agreement

Location: L-0001

Location Name: Continental Palace

Location Address: 100 Main Street, Dallas, TX 75234

UNITS: U-0000000007

Unit Name: CP-002

Usage: AR Record is Created on 01/04/2012 01:00 PM

Lease Start Date: 12/11/2011 1:25 AM

Lease Expiration Date: 12/20/2012 12:15 PM

Lease Status: ACTIVE

Billing and Receivable Setup

Rent Schedule: WEEKLY

Frequency Days: 7.00

Print Bill Date: 12/11/2011 1:25 AM

Current Bill Date: 1/4/2012 1:00 PM

Next Bill Date: 1/11/2012 1:00 PM

Days Bill/Payments Due: 30

Create BILAR ASAP

Last AR Creation Date: 1/4/2012 1:00 PM

Bill Mode: Auto

Summary of Lease Charges

Charge Note: Below Summary of Charges are Calculated only when there is a change to the Lease Record. Last Update date: 2012-01-04 19:00:04Z

Current Rent Charge: \$1,200.00

Current Utility Charge: \$0.00

Current General Charge: \$0.00

Current Discount Amount: \$0.00

Current Total Bill Amount: \$1,200.00

Total Deposit Collected: \$0.00

Next Bill Rent Charge: \$1,200.00

Next Bill Utility Charge: \$0.00

Next Bill General Charge: \$0.00

Next Bill Discount: \$0.00

Next Bill Total Charge: \$1,200.00

Created By: Behmen Sarilana: 12/11/2011 1:25 AM

Last Modified By: Behmen Sarilana: 1/4/2012 1:00 PM

Lessee Attach TENANT to this LEASE.

Leasee LP ID: LE-0000000004

Tenant ID: T-0000000004

Business Name: Jack Langley

Business Phone:

Cell Phone:

Lease Charges Charge Records for Lease.

Action	Lease Charge ID	Description	Charge*(net)(Discount)(tax) Amount	Charge Type	Frequency	Effective Date	Expiration Date	Active/Inactive	Next Bill Active/Inactive Ind
Edit Del	LC-0000000004	Basic Rent	\$1,200.00	RENT	RECURRING	12/11/2011 1:25 AM		✓	✓

View Existing Lease:

Select menu option “Lease” from the “TrackMeSetup” tab.

“View”: Select the Lease listed under the Lease ID Column on the List Screen. You can maneuver over the various TABs to view more details about its associated components.

ALL

Edit | Delete | Create New View

New Lease

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

ALL

Action	Lease ID	Lease Title	Description	Lease Start Date	Lease Expiration Date	Location Name	Unit Name	Rent Schedule	Lease Status
☐	LE-0000000004	Ming Garden	Ming Garden Lease...	12/11/2011 1:25 AM	12/20/2012 12:15 PM	Continental Palace	CP-002	WEEKLY	ACTIVE
☐	LE-0000000031	China Garden	Lease agreement...	12/23/2011 11:31 AM	12/23/2012 11:31 AM	Plaza Tower	Suite 100	WEEKLY	ACTIVE

Lease LE-0000000004

Display more information for each TAB associated with the LEASE Record.

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Lease Detail

Lease ID: LE-0000000004

Location: L-0001

Location Name: Continental Palace

Location Address: 100 Main Street, Dallas, TX, 75234

Unit ID: U-0000000007

Unit Name: CP-002

Message: AR Record is Created on 01/04/2012 01:00 PM

Lease Title: Ming Garden

Description: Ming Garden Lease Agreement

Lease Start Date: 12/11/2011 1:25 AM

Lease Expiration Date: 12/20/2012 12:15 PM

Lease Status: ACTIVE

Billings and Receivable Setup

Rent Schedule: WEEKLY

Frequency Days: 7.00

Print Bill Date: 12/11/2011 1:25 AM

Current Bill Date: 1/4/2012 1:00 PM

Next Bill Date: 1/11/2012 1:00 PM

Days Bill/Terminals Due: 30

Create Bill AR ASAP: ☐

Last AR Creation Date: 1/4/2012 1:00 PM

Bill Mode: Auto

Summary of Lease Charges

Charge Note: Below Summary of Charges are Calculated only when there is a change to the Lease Record. Last Update date: 2012-01-04 19:00:04Z

Current Rent Charge: \$1,200.00

Current Utility Charge: \$0.00

Current General Charge: \$0.00

Current Discount Amount: \$0.00

Current Total Bill Amount: \$1,200.00

Total Deposit Collected: \$0.00

Next Bill Rent Charge: \$1,200.00

Next Bill Utility Charge: \$0.00

Next Bill General Charge: \$0.00

Next Bill Discount: \$0.00

Next Bill Total Charges: \$1,200.00

Created By: Behmen Sanjana

Last Modified By: Behmen Sanjana

Lease999

New Lease

Action	Lease ID	Tenant ID	Tenant Name	Business Name	Business Phone	Cell Phone
Del	LE-0000000004	T-0000000004	Jack Langley	Jack Langley and Associates		

Lease Charges

New Lease Charges

Action	Lease Charge ID	Description	Charge Type/Discount/Net Amount	Charge Type	Frequency	Effective Date	Expiration Date	Active/Inactive	Next Bill Active/Inactive Ind
Del	LC-0000000004	Basic Rent	\$1,200.00	RENT	RECURRING	12/11/2011 1:25 AM		☒	☒

Lease LE-0000000004

List of all the Expenses that are incurred for this LEASE. If FedEx charges are incurred then it will be documented here for this LEASE record. This helps in analyzing expense at Lease Record Level.

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Account Payable

New Account Payable

Action	Expense ID	Description	Expense Status	Invoice Date	Invoice Due Date	Invoice Issuer	Invoice Number	Outstanding Balance	Total Invoice Amount	Total Amount Paid
Del	AP-0000000012	Mail Charges for Lease Agreement	Zero Payments Made	1/27/2012 2:35 PM	2/26/2012 2:35 PM	Fedex	12354	\$52.15	\$52.15	\$0.00

Lease LE-0000000004

Income details related to the Lease Record. Each schedule period the Rent collection record is created for this Lease. It helps in managing the Lease in terms of Collection Due and Paid.

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Account Receivable

New Account Receivable

Action	AR ID	Description	Bill Date	Payment Due Date	Total Bill Amount	Total Outstanding Balance	Total Payment Received
Del	AR-0000000004	Scheduled Billed based on Lease Charges: Basic Rent - 1200.00	12/11/2011 1:00 PM	1/10/2012 1:00 PM	\$1,200.00	\$1,200.00	\$0.00
Del	AR-0000000014	Scheduled Billed based on Lease Charges: Basic Rent - 1200.00	12/19/2011 1:00 PM	1/18/2012 1:00 PM	\$1,200.00	\$1,200.00	\$0.00
Del	AR-0000000018	Scheduled Billed based on Lease Charges: Basic Rent - 1200.00	12/27/2011 1:00 PM	1/26/2012 1:00 PM	\$1,200.00	\$1,200.00	\$0.00
Del	AR-0000000020	Scheduled Billed based on Lease Charges: Basic Rent - 1200.00	1/4/2012 1:00 PM	2/3/2012 1:00 PM	\$1,200.00	\$1,200.00	\$0.00

Lease LE-0000000004

Special Notes or Lease Attachment for future reference.

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Notes & Attachments

New Note | Attach File | View All

Action	Type	Title	Last Modified	Created By
Del	Note	Lease renewal instruction	1/27/2012 2:35 PM	Behmen Sanjana

Lease LE-0000000004

List all the Change Log or Audit trail for the LEASE Record.

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Date	Change	From	To	By
12/11/2011 1:25 AM	created			Behmen Sanjana
1/4/2012 1:00 PM	trackme_RE_Fire_AR_creation_c	true	false	Behmen Sanjana
12/11/2011 1:00 PM	trackme_RE_Fire_AR_creation_c	false	true	Behmen Sanjana
12/11/2011 1:00 PM	trackme_RE_Current_Bill_Date_c		Sun Dec 11 19:00:05 GMT 2011	Behmen Sanjana
12/11/2011 1:00 PM	trackme_RE_Fire_AR_creation_c	true	false	Behmen Sanjana
12/19/2011 1:00 PM	trackme_RE_Fire_AR_creation_c	false	true	Behmen Sanjana
12/19/2011 1:00 PM	trackme_RE_Current_Bill_Date_c	Sun Dec 11 19:00:05 GMT 2011	Mon Dec 19 19:00:06 GMT 2011	Behmen Sanjana

1.4.1 Attach LESSEE to the LEASE agreement

To attach the LESSEE to the LEASE, you will need existing entry for the TENANT. You can refer to Section 1.3 in order to create an Entry for the Tenant. Most Important is that the Credit rating for the Tenant record should be Approved or in By-pass status. You cannot attach a Lease to Tenant that do not have approved credit.

Views the LEASE Record created in Section 1.4, and then select the button “ADD LESSEE” from the LESSEE section.

TrackMe Search Dashboards TrackMeSetup TrackMeMaintenanceSetup TrackMeFinancials TrackMe Site Page TrackMe Users +									
ALL Edit Delete Create New View									
New Lease A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All									
☐	Action	Lease ID ↑	Lease Title	Description	Lease Start Date	Lease Expiration Date	Location Name	Unit Name	Lease Status
☐	Edit Del	LE-0000000004	Ming Garden	Ming Garden Lease...	12/11/2011 1:25 AM	12/20/2012 12:15 PM	Continental Palace	CP-002	WEEKLY ACTIVE
☐	Edit Del	LE-0000000001	China Garden	Lease agreement wit...	12/23/2011 11:31 AM	12/23/2012 11:31 AM	Plaza Tower	Suite 100	WEEKLY ACTIVE

Lease

LE-0000000004

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Lease Detail

Lease ID

LE-0000000004

Lease Title

Ming Garden

Description

Ming Garden Lease Agreement

Location

L-0001

Location Name

Continental Palace

Location Address

100 Main Street,Dallas,TX,75234

UNIT ID

L-0000000007

Unit Name

CP-002

Lease Start Date

12/11/2011 1:25 AM

Lease Expiration Date

12/20/2012 12:15 PM

Lease Status

ACTIVE

Message

AR Record is Created on 01/04/2012 01:00 PM

Billing and Receivable Setup

Rent Schedule

WEEKLY

Frequency Days

7.00

Print Bill date

12/11/2011 1:25 AM

Current Bill Date

1/4/2012 1:00 PM

Next Bill Date

1/11/2012 1:00 PM

Days Bill/Payment Due

30

Create Bill/AR ASAP

☐

Last AR Creation Date

1/4/2012 1:00 PM

Bill Mode

Auto

Summary of Lease Charges

Charge Note

Below Summary of Charges are Calculated only when there is a change to the Lease Record. Last Update date: 2012-01-04 19:00:04Z

Current Rent Charge

\$1,200.00

Current Utility Charge

\$0.00

Current General Charge

\$0.00

Current Discount Amount

\$0.00

Current Total Bill Amount

\$1,200.00

Total Deposit Collected

\$0.00

Next Bill Rent Charge

\$1,200.00

Next Bill Utility Charge

\$0.00

Next Bill General Charge

\$0.00

Next Bill Discount

\$0.00

Next Bill Total Charges

\$1,200.00

Created By

Behmen Sanjani 12/11/2011 1:25 AM

Last Modified By

Behmen Sanjani 1/4/2012 1:00 PM

Lessee

New Lessee

Actions

Leases LP ID

Tenant ID

Tenant Name

Business Name

Business Phone

Cell Phone

Del

LP-0000000004

T-0000000004

Jack Langley

Jack Langley and Associates

Lease Charges

New Lease Charges

Action

Lease Charge ID

Description

Charge Type(Discount(-ve)) Amount

Charge Type

Frequency

Effective Date

Expiration Date

Active/Inactive

Next Bill Active/Inactive Ind

Edit | Del

LC-0000000004

Basic Rent

\$1,200.00

RENT

RECURRING

12/11/2011 1:25 AM

Lease Edit

Adding LESSEE to the LEASE Record.

Help for this Page

Save

Save & New

Cancel

Information

Required Information

Lease

LE-0000000004

Tenant

Save

Save & New

Cancel

Lookup

Search for T- to retrieve all the Tenant.

Search

Go!

You can use "" as a wildcard next to other characters to improve your search results.

Lookup for List of TENANT that you want to assign to the LEASE.

Search Results

Tenant ID

Print Name

Last Name

Business Name

City

State/Township

Business Phone

Home Phone

Cell Phone

Primary Email

T-0000000005

John

Smith

Smith Consultancy, LLC

Chicago

IL

behmens@yahoo.com

T-0000000004

Jack

Langley

Jack Langley and Associates

Chicago

IL

behmens@yahoo.com

Lease

View of the LESSEE record.

LP-0000000004

Customize Page | Printable View | Help for this Page

Details

Notes and Attachments

Change Log

Lessee Detail

LP ID

LP-0000000004

Lease

LE-0000000004

Tenant

T-0000000004

Tenant Name

Jack Langley

Business Name

Jack Langley and Associates

Created By

Behmen Sanjani 12/11/2011 1:25 AM

Last Modified By

Behmen Sanjani 12/11/2011 1:25 AM

Edit

Clone

Back to Lease Agreement

Back to Tenant

Page | 16

A Lease record is not active unless at least one Lease Charge is created and assigned to the LEASE RECORD. Lease charges can be a recurring RENT or a One Time Charge or Fee entry. Lease Charges can be future dated in case if you have a change in the amount. A discount can also be created for a Lease Charge by creating a new lease charge and classifying it as a Discount.

[illegible][illegible]

Learn Create Edit

Create new LEASE CHARGE Inroad.

Help to the page

New Lease Charges

Lease Charges Edit

Save Save & Next Cancel

Information

1 - Required Information

Description:

Charge Type:

Charge Period:

Effective Date:

Frequency:

Lease:

Submit/Cancel

Next & Back Cancel

The screenshot shows the 'View Charge Detail' page in the 'LAWSON' system. The page header includes the 'LAWSON' logo and the charge ID 'LC-0000000004'. The main content area displays the following details:

- Charge ID:** LC-0000000004
- Charge Description:** LAWSON
- Charge Date:** 12/1/2011
- Charge Amount:** \$1,200.00
- Charge Status:** PAID
- Charge Type:** ✓
- Charge Category:** ✓

At the bottom of the page, there are navigation links: 'Back to Charge Summary', 'Print Charge Detail', and 'View Charge Detail'.

DISCOUNT

DISCOUNT CHARGE is an event where a 10% discount is given on the BASIC PRICE when this event can be configured in the **PRICE CHARGE** record.

Charge Type = DISCOUNT
ChargeTypeDiscount=00 Amount = 420 (1000*10%)
Frequency = RECURRING or One-time!

1.4.2.1 Create or Edit a DISCOUNT on LEASE CHARGE

TrackMe Search

Dashboards

TrackMe Setup

TrackMeMaintenance Setup

TrackMeFinancials

TrackMe Site Page

TrackMe Users

+

50

ALL

Edit | Delete | Create New View

?

New Lease

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

ALL

☐	Action	Lease ID	Lease Title	Description	Lease Start Date	Lease Expiration Date	Location Name	Unit Name	Rent Schedule	Lease Status	Bill Mo
☐	Edit Delete	LE-0000000004	Ming Garden	Ming Garden Lease...	12/11/2011 1:25 AM	12/20/2012 12:15 PM	Continental Palace	CP-002	WEEKLY	ACTIVE	Auto
☐	Edit Delete	LE-0000000001	China Garden	Lease agreement wit...	12/23/2011 11:31 AM	12/23/2012 11:31 AM	Piazza Tower	Suite 100	WEEKLY	ACTIVE	Auto

Lease

LE-0000000004

Customize Page | Printable View | Help for this Page

Details

Expense Details

Income Details

Notes and Attachments

Change Log

Lease Detail

Edit

Clone

Back to Previous Page

Go to List

Lease ID

LE-0000000004

Location

L-0001

Lease Title

Ming Garden

Location Name

Continental Palace

Description

Ming Garden Lease Agreement.

Location Address

100 Main Street,Dallas,TX,75234

Lease Start Date

12/11/2011 1:25 AM

Units

U-0000000007

Lease Expiration Date

12/20/2012 12:15 PM

Unit Name

CP-002

Lease Status

ACTIVE

Message

AR Record is Created on 01/27/2012 05:18 PM

▼ Billing and Receivable Setup

Rent Schedule

WEEKLY

Create Bill/AR ASAP

☐

Frequency Days

7.00

Last AR Creation Date

1/27/2012 5:18 PM

Print Bill date

12/11/2011 1:25 AM

Bill Mode

Auto

Current Bill Date

1/27/2012 5:18 PM

Next Bill Date

2/3/2012 5:18 PM

Days Bill/Payment Due

30

▼ Summary of Lease Charges

Charge Note

Below Summary of Charges are Calculated only when there is a change to the Lease Record. Last Update date: 2012-01-27 23:18:03Z

Current Rent Charge

\$1,200.00

Current Utility Charge

\$0.00

Current General Charge

\$0.00

Current Discount Amount

(\$120.00)

Current Total Bill Amount

\$1,080.00

Total Deposit Collected

\$0.00

Next Bill Rent Charge

\$1,200.00

Next Bill Utility Charge

\$0.00

Next Bill General Charge

\$0.00

Next Bill Discount

(\$120.00)

Next Bill Total Charges

\$1,080.00

Created By

Behmen Sanjani 12/11/2011 1:25 AM

Last Modified By

Behmen Sanjani 1/27/2012 5:18 PM

Edit

Clone

Back to Previous Page

Go to List

L96599

New Leases

Action	Lease: LI# ID	Tenant ID	Tenant Name	Business Name	Business Phone	Cell Phone
Del	LE-0000000004	T-0000000004	Jack Langley	Jack Langley and Associates		
Del	LE-00000000030	T-00000000055	John Smith	Smith Consultancy, LLC		

Lease Charges

New Lease Charges

Action	Lease Charge ID	Description	Charge*(+ve)/Discount*(-ve) Amount	Charge Type	Frequency	Effective Date	Expiration Date	Active/Inactive	Next Bill Active/Inactive Ind
Edit Del	LC-00000000004	Basic Rent	\$1,200.00	RENT	RECURRING	12/11/2011 1:25 AM		✓	✓
Edit Del	LC-00000000082	10% Discount on RENT	(\$120.00)	DISCOUNT	RECURRING	1/27/2012 5:16 PM		✓	✓

Discount of \$120 applied to the Lease Record. The total Rent payable after the Discount is \$1080 (1200-120). See below the Lease Charge for -\$120 Discount Transaction.

Lease Charges

LC-00000000082

LEASE CHARGE DETAIL RECORD that describe the setup for Discount of \$120-. The Record is setup as Recurring so for every Bill -\$120 will be deducted from the Total RENT.

Customize Page | Printable View | Help for this Page

Details

Notes and Attachments

Change Log

Lease Charges Detail

Edit

Clone

Back to Lease Agreement

Lease Charge ID

LC-00000000082

Lease

LE-0000000004

Description

10% Discount on RENT

Lease Description

Ming Garden Lease Agreement.

Charge Type

DISCOUNT

Charge*(+ve)/Discount*(-ve) Amount

(\$120.00)

Effective Date

1/27/2012 5:16 PM

Expiration Date

Frequency

RECURRING

Active/Inactive

✓

Next Bill Active/Inactive Ind

✓

Created By

Behmen Sanjani 1/27/2012 5:16 PM

Last Modified By

Behmen Sanjani 1/27/2012 5:18 PM

Edit

Clone

Back to Lease Agreement

Page | 18

1.4.3 Generate BILL or ACCOUNT RECEIVABLE entry for the LEASE

Once the LEASE CHARGE record is created and the LEASE STATUS IS ACTIVE, you can start generating Billing or ACCOUNT RECEIVABLE or INCOME records for this Lease. You can manually generate a Bill record on a schedule date using the BILL MODE as MANUAL; however, this effort will require manual intervention. Another method is to set up the BILL Mode as AUTO and then setup a BATCH JOB to run every day at a set time to create the Billing record.

Manual AR Record can be created anytime after the NEXT BILL DATE by checking the checkbox “Create BILL/AR ASAP” and then saving the Lease record. You can verify the Bill or AR record is created by refreshing the LEASE RECORD (press F5 in your Browser), and switching to the INCOME DETAIL tab.

TrackMe Search Dashboards TrackMeSetup TrackMeMaintenanceSetup TrackMeFinancials TrackMe Site Page TrackMe Users +											
ALL Edit Delete Create New View											
New Lease A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All											
☐	Action	Lease ID ↑	Lease Title	Description	Lease Start Date	Lease Expiration Date	Location Name	Unit Name	Rent Schedule	Lease Status	Bill Mode
☐	Edit Del	LE-0000000004	Ming Garden	Ming Garden Lease...	12/11/2011 1:25 AM	12/20/2012 12:15 PM	Continental Palace	CP-002	WEEKLY	ACTIVE	Auto
☐	Edit Del	LE-0000000001	China Garden	Lease agreement wit...	12/23/2011 11:31 AM	12/23/2012 11:31 AM	Plaza Tower	Suite 100	WEEKLY	ACTIVE	Manual

Lease
LE-0000000001

After the Manual AR / Income record is created, then you can go to the "Income Details" TAB and check the AR Record to ensure that it was created and has all the relevant information.

Customize Page | Printable View | Help for this Page

Details Expense Details **Income Details** Notes and Attachments Change Log

Lease Detail

Lease ID: LE-0000000001

Lease Title: China Garden

Description: Lease agreement with China Garden Restaurant.

Lease Start Date: 12/23/2011 11:31 AM

Lease Expiration Date: 12/23/2012 11:31 AM

Lease Status: ACTIVE

Location: L-0002

Location Name: Plaza Tower

Location Address: 300 South LakeView Drive, Chicago, IL 61001

Unit ID: U-0000000004

Unit Name: Suite 100

Message: AR Record is Created on 01/06/2012 01:04 PM

☒ Create AR ASAP

Check Box that will trigger a Manual Income (AR) record for this LEASE.

Next Bill Date: 1/13/2012 1:04 PM

This is the Date after which a new AR / Income Record can be created.

Last AR Creation Date: 1/6/2012 1:04 PM

Bill Mode: Manual

BILL MODE = "MANUAL" means that the Manager has to manually trigger a Income Record for this LEASE.

Billing and Receivable Setup

Rent Schedule: WEEKLY

Frequency Days: 7.00

First Bill Date: 12/23/2011 11:33 AM

Current Bill Date: 1/6/2012 1:04 PM

Days Bill/Payments Due: 10

Summary of Lease Charges

Charge Note: Below Summary of Charges are Calculated only when there is a change to the Lease Record. Last Update date: 2012-01-28 00:13:47Z

Current Rent Charge: \$1,500.00

Current Utility Charge: \$0.00

Current General Charge: \$0.00

Current Discount Amount: \$0.00

Current Total Bill Amount: \$1,500.00

Total Deposit Collected: \$0.00

Next Bill Rent Charge: \$1,500.00

Next Bill Utility Charge: \$0.00

Next Bill General Charge: \$0.00

Next Bill Discount: \$0.00

Next Bill Total Charges: \$1,500.00

Created By: Sahmen Sahiana 12/23/2011 11:32 AM

Last Modified By: Sahmen Sahiana 1/27/2012 8:13 PM

Leases

New Lease

Action	Lease: L# ID	Tenant ID	Tenant Name	Business Name	Business Phone	Cell Phone
Del	LP-00000000079	T-00000000004	Jack Langley	Jack Langley and Associates		

Lease Charges

New Lease Charges

Action	Lease Charge ID	Description	Charge*(+ve)/(Discount)(-ve) Amount	Charge Type	Frequency	Effective Date	Expiration Date	Active/Inactive	Next Bill Active/Inactive Ind
Edit Del	LC-00000000001	Basic Rent	\$1,500.00	RENT	RECURRING	12/23/2011 11:33 AM		✓	✓

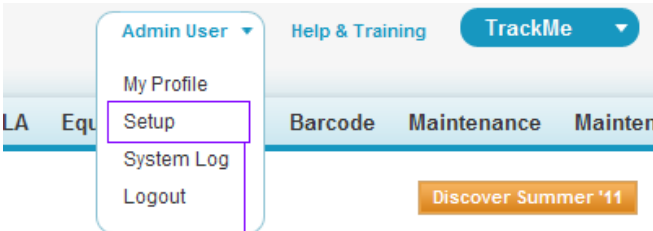
NOTE: BILL MODE= AUTO. In order for the AR / Income records to be auto created on the NEXT BILL DATE, the Lease has to be ACTIVE and there is a BATCH Job that must be scheduled to be executed on a Daily Basis. More details about the BATCH JOB setup is in the BATCH JOB setup Section.

1.4.4 Automate the BILLING process for LEASE (Bill Batch Job Setup)

This item must be performed by the User that has System administrator privilege.

1.4.4.1 Check for the Batch Job that will trigger the Billing or Account Receivable for the Lease on a Bill date.

Step 1: Select "Setup" from the top Menu item.



Select the option "Setup" from the Menu Item.

Step 2: From the Left hand menu, select the option "Monitoring" from the Administration Setup.

Step 3: Select the option "Schedule job" from the drop down menu under "Monitoring". If a job is present in your environment, and it is active to run on a daily basis then you don't have to perform the steps to create a new batch job.

Force.com Home

Personal Setup

My Personal Information

Email

Import

Desktop Integration

My Chatter Settings

App Setup

Customize

Create

Develop

Deploy

Scheme Builder **New!**

Installed Packages

AppExchange Marketplace

Critical Updates

Administration Setup

Manage Users

Company Profile

Security Controls

Communication Templates

Translation Workbench

Data Management

Monitoring

Imports

Outbound Messages

Time-Based Workflow

Automated Process Actions

Case Escalations

API Usage Notifications

Mass Emails

Debug Logs

Scheduled Jobs

Apex Jobs

Bulk Data Load Jobs

Email Log Files

Mobile Administration

Desktop Administration

Email Administration

Google Apps

VIEW IF THE BATCH JOB FOR BILLING is already schedule in the system and the Next schedule run is defined. If it is already schedule then we don't need to follow the step in scheduling the BATCH JOB. You must click the MANAGE option against the listed JOB to ensure the following:
A. Script it will execute is "ScheduleBillingARFlagUpdate"
B. End date is sometime in Future

All Scheduled Jobs

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: All Scheduled Jobs Create New View

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Manage	Daily 1pm Billing Job	Sanjana_Bahman	12/11/2011 12:45 PM	1/11/2012 1:00 PM		Scheduled Apex
Manage	Daily Lease Monitoring Job 2pm	Sanjana_Bahman	12/20/2011 1:27 PM	1/20/2012 2:00 PM		Scheduled Apex
Manage	Daily Maintenance Case Job 12pm	Sanjana_Bahman	12/20/2011 11:56 AM	2/2/2012 12:00 PM	2/3/2012 12:00 PM	Scheduled Apex
Manage	Daily Maintenance Case Job 7pm	Sanjana_Bahman	12/19/2011 9:55 PM	2/1/2012 7:00 PM	2/2/2012 7:00 PM	Scheduled Apex
Manage	Daily Maintenance Case Job 8pm	Sanjana_Bahman	12/19/2011 7:18 PM	2/1/2012 8:00 PM	2/2/2012 8:00 PM	Scheduled Apex

Schedule Apex

Schedule an Apex class that implements the 'Scheduleable' interface to be automatically executed on a weekly or monthly interval.

Job Name

Daily 1pm Billing Job

Verify that the APEX CLASS name is matching as stated in here.

Apex Class

ScheduleBillingARFlagUpdate

Schedule Apex Execution

Frequency

☒ Weekly

☐ Monthly

Recur every week on

☒ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☒ Saturday

Start

12/11/2011

2/2/2012

End

1/11/2012

2/2/2012

Verify that the End date is sometime in the Future.

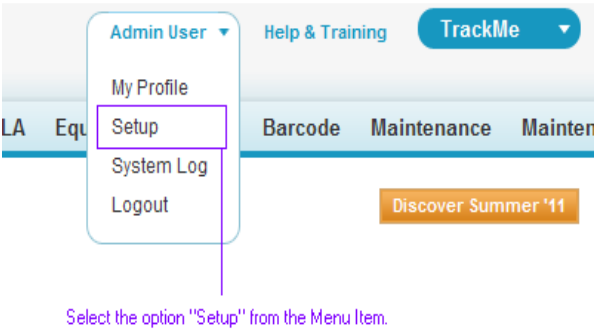
Preferred Start Time

1:00 PM

Exact start time will depend on job queue activity.

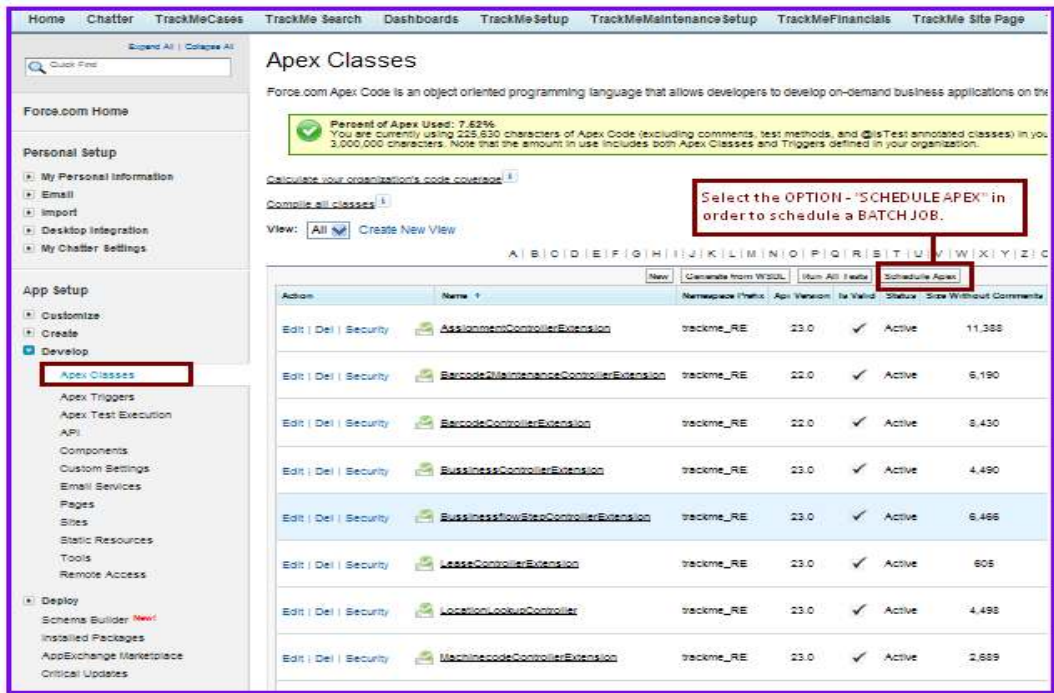
1.4.4.2 Create a New Batch Job to trigger the Billing or Account Receivable for the Lease on a Bill date

Step 1: Select “Setup” from the top Menu item.

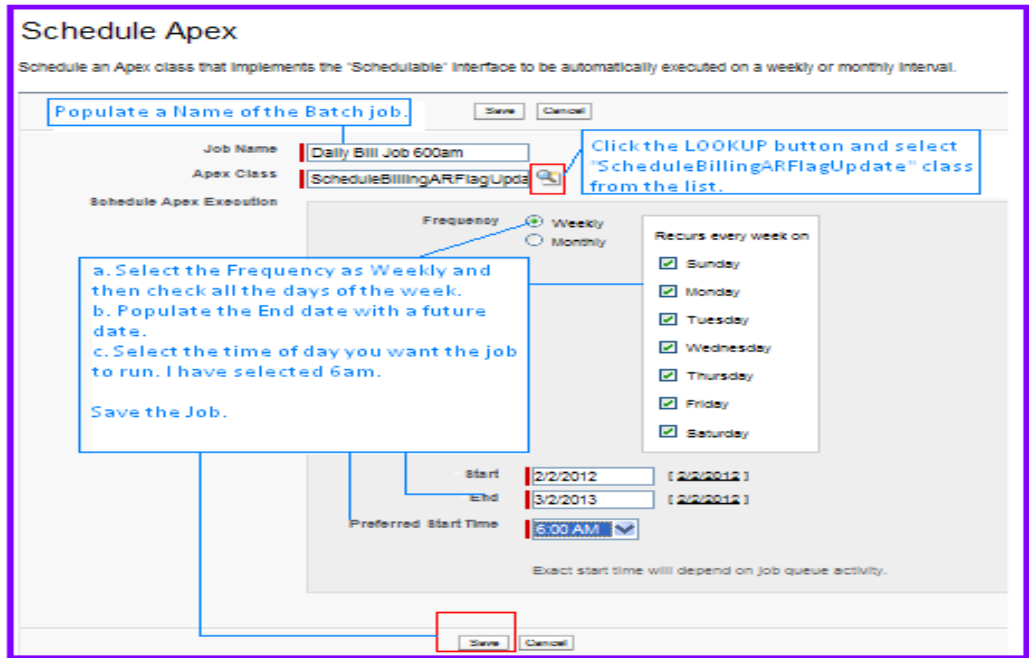


Step 2: Select the “APEX Class” option from the side Menu item under “Develop”.

Step 3: Select the button “Schedule Apex” from the Apex Classes.



Step 4: Create the new batch Job to automate the Lease Billing on the Next Bill date. This job will review Lease that are in ACTIVE status and has the BILL MODE set as AUTO. On the schedule NEXT BILL DATE, the job will trigger a creation of a new Billing or ACCOUNT RECEIVABLE or INCOME record for this Lease. You can view the AR record from the INCOME TAB on the LEASE DETAIL SCREEN.



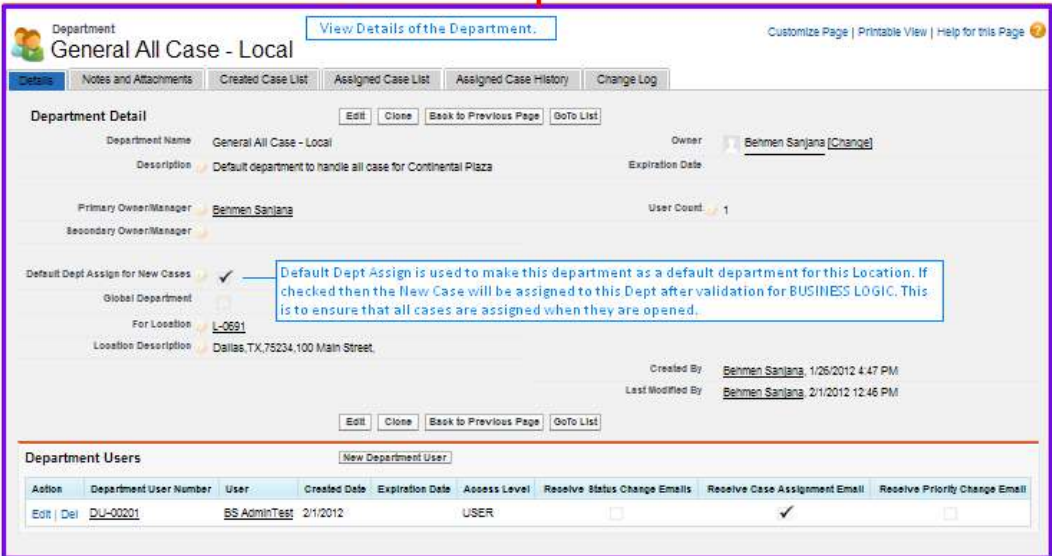
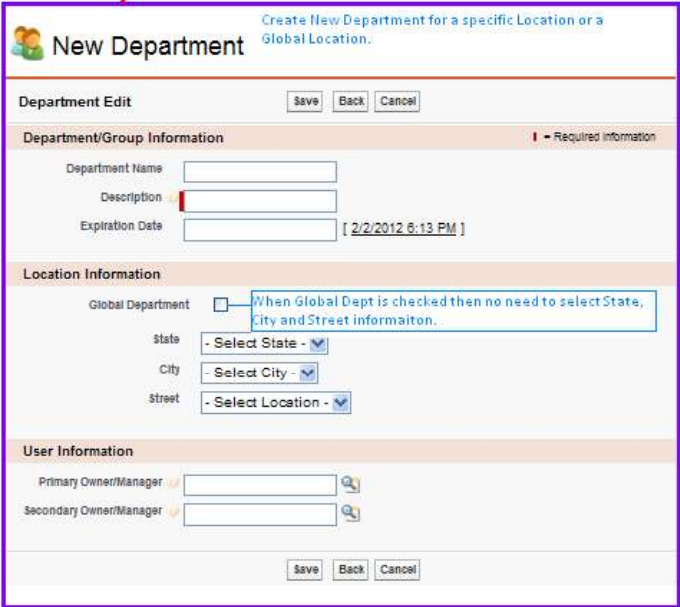
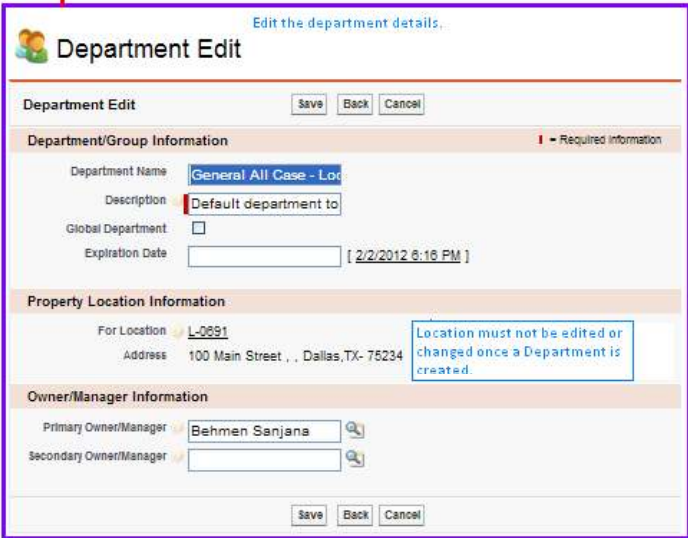
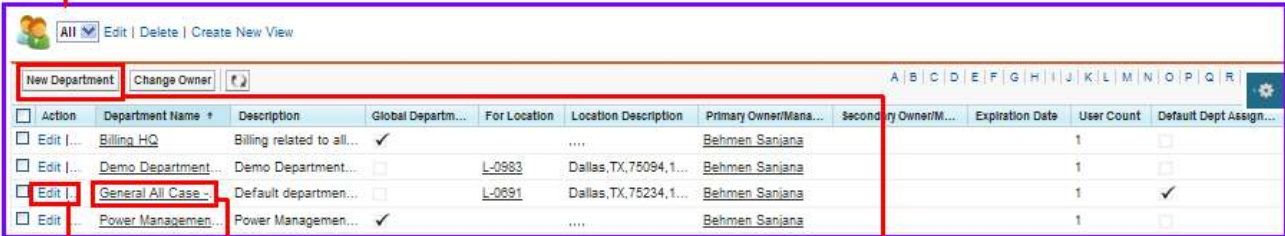
1.5 DEPARTMENT

Define and identify the groups and teams responsible to investigate and resolve the issues reported by the User community. When a TrackMe Case is assigned to a specific department then all the users present under this department will receive the email communications pertaining to the case assignment or any changes like priority or Status. This group will be informed immediately via email about a case being assigned to them.

Create New or Edit Existing Department:

Select the menu option “Department” from the “TrackMeSetup” Tab.

- **“New Department”**: Select the button “New Department” from the Department List Screen.
- **“Edit”**: Select “Edit” next to the existing Department in the Department List Screen.
- **“View”**: Select the specific entry listed under the “Department Name” column.



View Existing Department:

Select menu option “Departments” from the “TrackMeSetup” tab.

“View”: Select the department listed under the Department Name Column on the List Screen. You can maneuver over the various TABs to view more details about its associated components.

TrackMe Search

Dashboards

TrackMeSetup

TrackMeMaintenanceSetup

TrackMeFinancials

TrackMe Site Page

TrackMe Users

TrackMe S E T U P

Department and Team Management

Departments & Teams

CREATE and MODIFY information related to each Department, and, its associated Team for Specific Property Location.

All

Edit

Delete

Create New View

New Department

Change Owner

A

B

C

D

E

F

G

H

I

J

K

L

M

Action	Department Name	Description	Global Departm...	For Location	Location Description	Primary Owner/Mana...	Secondary Owner/M...	Expiration Date	User Count
☐	Billng HQ	Billing related to all...	☒			Behmen Sanjana			1
☐	Demo Department...	Demo Department...	☐	L-0993	Dallas,TX,75094,1...	Behmen Sanjana			1
☐	General All Case -...	Default departmen...	☐	L-0891	Dallas,TX,75234,1...	Behmen Sanjana			1
☐	Power Managemen...	Power Managemen...	☒			Behmen Sanjana			1

Department

General All Case - Local

Detail of the Department. Exploring the various TABs for this Department.

Customize Page | Printable View | Help for this Page

Details

Notes and Attachments

Created Case List

Assigned Case List

Assigned Case History

Change Log

Department Detail

Edit

Clone

Back to Previous Page

GoTo List

Department Name

General All Case - Local

Owner

Behmen Sanjana

Change

Description

Default department to handle all case for Continental Plaza

Expiration Date

Primary Owner/Manager

Behmen Sanjana

User Count

1

Secondary Owner/Manager

Default Dept Assign for New Cases

☒

Global Department

☐

For Location

L-0691

Location Description

Dallas,TX,75234,100 Main Street,

Created By

Behmen Sanjana

1/26/2012 4:47 PM

Last Modified By

Behmen Sanjana

2/1/2012 12:46 PM

Edit

Clone

Back to Previous Page

GoTo List

Department Users

New Department User

Action	Department User Number	User	Created Date	Expiration Date	Access Level	Receive Status Change Emails	Receive Case Assignment Email	Receive Priority Change Email
☐	DU-00201	BS AdminTest	2/1/2012		USER	☐	☒	☐

Edit

Del

Department

General All Case - Local

List of Notes and Attachment associated with this department.

Customize Page | Printable View | Help for this Page

Details

Notes and Attachments

Created Case List

Assigned Case List

Assigned Case History

Change Log

Notes & Attachments

New Note

Attach File

View All

Action	Type	Title	Last Modified	Created By
☐	Note	Assign All Cases to this Dept for Dallas	2/2/2012 6:08 PM	Behmen Sanjana

Edit

Del

Department

General All Case - Local

List of TrackMe CASE created by this Department. This can be used to analyze internal cases that are opened by a department.

Customize Page | Printable View | Help for this Page

Details

Notes and Attachments

Created Case List

Assigned Case List

Assigned Case History

Change Log

TrackMeCases (Creating Department)

New TrackMeCase

No records to display.

Department

General All Case - Local

List of TrackME CASE that are currently assigned to this Department.

Customize Page | Printable View | Help for this Page

Details

Notes and Attachments

Created Case List

Assigned Case List

Assigned Case History

Change Log

TrackMeCases (Department Assigned)

New TrackMeCase

Action	Case Number	Description	Priority	Status	Case Category	Created Date	State	City	Address
☐	Q-05714	The lobby is not well lighted.		Assigned	Electric	12/23/2011	TX	Dallas	100 Main Street .

Edit

Del

Department

General All Case - Local

List of CASES that are at one point in time assigned to this Department. If a case was assigned even once to this department then it will appear in this listing.

Customize Page | Printable View | Help for this Page

Details

Notes and Attachments

Created Case List

Assigned Case List

Assigned Case History

Change Log

Case Assignments

New Case Assignment

Action	Case Assignment Number	Department User	Level	Case	Priority	Priority Modified Date	Related Department Assignment	Assigned User	Due Date	Expiration Date
☐	QA-000769		Department	Q-05714						

Edit

Del

Department

General All Case - Local

List of Change Log used as an AUDIT tool to review the changes made to this department.

Customize Page | Printable View | Help for this Page

Details

Notes and Attachments

Created Case List

Assigned Case List

Assigned Case History

Change Log

Date	Change	From	To	By
1/26/2012 4:47 PM	trackme_RE_Property_Manager__c	false	true	Behmen Sanjana
1/26/2012 4:47 PM	created			Behmen Sanjana

1.6 Department User Management:

Departments are made up of team members from the organization. The Users listed under the department will only be able to make changes to the TrackMe Case. Hence, if a user that is not part of this department will not be able to make any updates or change status of the case. Non TrackMe user cannot be assigned to the department. License user will only be listed in the User section.

New Department Users:

Create New or Edit Existing Department USERS:

Select the menu option “Dept User Mapping” from the “TrackMeSetup” Tab.

- **“New Department User”**: Select the button “New Department User” from the Dept User Mapping List Screen.
- **“Edit”**: Select “Edit” next to the existing “Department User Number” in the Department List Screen.
- **“View”**: Select the specific entry listed under the “Department User Number” column.

Another way to add user to the Department is by selecting the specific department from the Department list, and, then selecting the “Assigned User” tab.

TrackMe Search

Dashboards

TrackMe Setup

TrackMe Maintenance Setup

TrackMe Financials

TrackMe Site Page

TrackMe Users

TrackMe S E T U P

Department Users Mapping

Department User Mapping

View the TrackMe Users that are assigned to Department.

ALL Dept and Users

Edit | Delete | Create New View

New Department User

Action	Department User No...	Department	User	Expiration Date	Receive Status Chan...	Access Level	Receive Case Assig...	Receive Tenant Resp...	Receive Priority Cha...
☐ Edit Del	DU-00126	Power Management HQ	Pushban Member		☐	USER	☒	☒	☐
☐ Edit Del	DU-00196	Billing HQ	Behmen Sanjana		☒	USER	☒	☒	☒
☐ Edit Del	DU-00197	Demo Department Local	Behmen Sanjana		☒	MANAGER	☒	☒	☒
☐ Edit Del	DU-00201	General All Case - Lo...	BS AdminTest		☐	USER	☒	☐	☐

Department User Edit

Create New DEPARTMENT and USER Combination entry. The Same can be done by accessing the DEPARTMENT from the SETUP MENU and then selecting the ADD USER button in DEPT USER SECTION.

for this Page

Department User Edit

Save | Save & New | Cancel

Information

Department

Expiration Date [2/2/2012 8:30 PM]

User

Access Level USER

Receive Status Change Emails ☐

Receive Priority Change Email ☐

Receive Case Assignment Email ☒

Receive Tenant Response Email ☐

Access Level are of two types - USER and MANAGER. USER will have very limited access on the TrackMeCase contents. USER cannot send case Update Emails to the Tenant or Contact Person. To have EDIT privilege, the CASE should be assigned to a Department, and, the USER must be part of or Member of the assigned department. MANAGER on the other hand will have access (edit privilege) to the TRACKME CASE even if the CASE is assigned to ANOTHER department that they are not the member.

EMAIL notification option. Check the checkbox if you want the user of this department to receive emails when there is a change in CASE status, Priority, Assignment, and Tenant is sent an update.

Save | Save & New | Cancel

Department User Edit

Edit the existing DEPARTMENT USER record.

Help for this Page

Department User Edit

Save | Save & New | Cancel

Information

Department User Number DU-00201

Expiration Date [2/2/2012 8:32 PM]

Department General All Case - Local

User BS AdminTest

Department cannot be edited once the record is created.

Access Level USER

Receive Status Change Emails ☐

Receive Priority Change Email ☐

Receive Case Assignment Email ☒

Receive Tenant Response Email ☐

Access Level are of two types - USER and MANAGER. USER will have very limited access on the TrackMeCase contents. USER cannot send case Update Emails to the Tenant or Contact Person. To have EDIT privilege, the CASE should be assigned to a Department, and, the USER must be part of or Member of the assigned department. MANAGER on the other hand will have access (edit privilege) to the TRACKME CASE even if the CASE is assigned to ANOTHER department that they are not the member.

Save | Save & New | Cancel

Department User

View the Details about the DEPARTMENT USER Record.

Customize Page | Printable View | Help for this Page

Details

Assigned Case History

Change Log

Department User Detail

Edit | Clone | Back to Previous Page | Back to Department | GoTo List

Department User Number DU-00201

Expiration Date Expired NO

Department General All Case - Local

User BS AdminTest

Access Level USER

Receive Status Change Emails ☐

Receive Priority Change Email ☐

Receive Case Assignment Email ☒

Receive Tenant Response Email ☐

Created By Behmen Sanjana 2/1/2012 12:46 PM

Last Modified By Behmen Sanjana 2/1/2012 12:46 PM

Edit | Clone | Back to Previous Page | Back to Department | GoTo List

View Existing Department USERS

Select menu option “Dept User Mapping” from the “TrackMeSetup” tab.

“View”: Select the “Number” listed under the Department User Number Column on the List Screen. You can maneuver over the various TABs to view more details about its associated components.

TrackMe SearchDashboardsTrackMe SetupTrackMeMaintenanceSetupTrackMeFinancialsTrackMe Site PageTrackMe Users

TrackMe S E T U P

▼ Department Users Mapping

Department User MappingView the TrackMe Users that are assigned to Department.

ALL Dept and UsersEdit | Delete | Create New View

New Department User

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

☐	Action	Department User Nu...	Department	User	Expiration Date	Receive Status Chan...	Access Level	Receive Case Assig...	Receive Tenant Resp...	Receive Priority Cha...
☐	Edit Del	DU-00126	Power Management HQ	Pushtan Member		☐	USER	✓	✓	☐
☐	Edit Del	DU-00196	Billing HQ	Behmen Sanjana		✓	USER	✓	✓	✓
☐	Edit Del	DU-00197	Demo Department Local	Behmen Sanjana		✓	MANAGER	✓	✓	✓
☐	Edit De	DU-00201	General All Case - Lo ...	BS AdminTest		☐	USER	✓	☐	☐

Department User DU-00201

DetailScreen for a particular Department and User combination. Exploring all the TABs that are associated with this Department User Record.

Customize Page | Printable View | Help for this Page

DetailsAssigned Case HistoryChange Log

Department User Detail

Edit | Clone | Back to Previous Page | Back to Department | GoTo List

Department User NumberDU-00201

DepartmentGeneral All Case - Local

UserBS AdminTest

Access LevelUSER

Expiration DateExpiredNO

Receive Status Change Emails☐

Receive Priority Change Email☐

Receive Case Assignment Email☒

Receive Tenant Response Email☐

Created ByBehmen Sanjana2/1/2012 12:46 PM

Last Modified ByBehmen Sanjana2/1/2012 12:46 PM

Edit | Clone | Back to Previous Page | Back to Department | GoTo List

Department User DU-00201

List of TrackMe CASE currently assigned to this Department and this User combination.

Customize Page | Printable View | Help for this Page

DetailsAssigned Case HistoryChange Log

Case Assignments

New Case Assignment

Action	Case Assignment Number	Department	Related Department Assignment	Priority Modified Date	Priority
Edit Del	QA-000770	General All Case - Local	QA-000769		

Department User DU-00201

List of Change Log for Audit purpose. Keep track of data being changed in various fields on the Department User record.

Customize Page | Printable View | Help for this Page

DetailsAssigned Case HistoryChange Log

Date	Change	From	To	By
2/1/2012 12:46 PM	Name		DU-00201	Behmen Sanjana
2/1/2012 12:46 PM	created			Behmen Sanjana

Page | 25

1.7 BUSINESS FLOW

Define and identify the automatic assignment of the issue reported in one of the Request type category for a given location to a specific department based on “Status” of the Cases. By setting up the Business Flow for a given Request-type and Location, the user will ensure that any new TrackMe Cases that are created are automatically assigned to the specific department. This will ensure that specific cases are auto routed to the designated department. The same process exists for existing cases with different status. Hence, when the case status changes from “Assigned” to “Complete” then the TrackMe Case will be auto routed to the department defined for this case status.

Create New or Edit Existing BUSINESS FLOW:

Select the menu option “Business Flow” from the “TrackMeSetup” Tab.

- **“New”**: Select the button “New Business Flow” from the Business Flow List Screen.
- **“Edit”**: Select “Edit” next to the existing under the “Action” column in the Business Flow List Screen.
- **“View”**: Select the specific entry listed under the “Business Flow Name” column.

There are two parts to this Process:

1. Create the Business Flow that will be defined for a given the Case Category or Request-type and Location (specific or global).
2. Create child entries called Business-Flow Steps that will define the departments for each TrackMe Case Status.

1.7.1 Part I - Create Business Flow

The screenshot displays the Business Flow Management interface. At the top, there is a navigation bar with a green 'G' icon, a dropdown menu showing 'All', and links for 'Edit', 'Delete', and 'Create New View'. Below this is a table with columns: 'Action', 'Business Flow Name', 'Description', 'Location', 'Location Description', 'Request Type', 'Effective Date', and 'Expiration Date'. The first row shows a flow named 'Billing - Local' with the description 'Auto assign the Billing issue for ...', location 'L-0112', location description 'Murphy, TX, 75094-4338', request type 'Billing', effective date '8/10/2011 5:06 PM', and expiration date '8/10/2011 5:06 PM'. Below the table, there are two main sections: 'Business Flow Edit' and 'New Business Flow'. The 'Business Flow Edit' section contains fields for 'Business Flow Name' (Billing - Local), 'Description' (Auto assign the Billing issue for), 'Request Type' (Billing), 'Effective Date' (8/10/2011 5:06 PM), 'Expiration Date' (8/26/2011 5:19 PM), and 'Location Information' (Location: L-0112, Address: 833 Morningside Trl, Murphy TX 75094-4338). The 'New Business Flow' section contains fields for 'Business Flow Name', 'Description', 'Request Type' (Maintenance), 'Effective Date' (8/26/2011 5:17 PM), 'Expiration Date' (8/26/2011 5:17 PM), and 'Location Information' (State, City, Street). At the bottom, there is a 'Business Flow Detail' section for 'Billing - Local' showing details like 'Business Flow Name', 'Description', 'Location', 'Location Description', 'Request Type', 'Effective Date', 'Expiration Date', 'Created By' (Behmen Sanjana), and 'Last Modified By' (Behmen Sanjana).

1.7.1 Part II - Create Business Step Flow

Create New or Modify Existing BUSINESS FLOW STEPS:

After creating the Business Flow, select the “Assign Dept by Case Status” Tab from the View “Business Flow” screen. From here you can select “New” or “Edit” the existing Business Flow Steps entries that is associated to a specific Business flow.

All

Edit | Delete | Create New View

New Business Flow

Change Owner

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

☐	Action	Business Flow Name ↑	Description	Location	Location Description	Request Type	Effective Date	Expiration Date
☐	Edit Del	Billing - Local	Auto assign the Billing ...	L-0112	Murphy, TX, 75094-433...	Billing	8/10/2011 5:06 PM	

Business Flow

Billing - Local

Details about the Flow for the TrackMe Case that are of Type Billing and are for specific location.

Customize Page | Printable View | Help for this Page

Details | Assign Dept by Case Status | Notes and Attachments | Change Log

Business Flow Detail

Edit | Delete | Back to Previous Page

Business Flow Name

Billing - Local

Owner

Behmen Sanjana [Change]

Description

Auto assign the Billing issue for Murphy

Location

L-0112

Location Description

Murphy, TX, 75094-4338, 833 Morningside Trl,

In case when Location is not selected at the time of creating this Business Flow then it is treated as a Global Flow.

Request Type

Billing

Effective Date

8/10/2011 5:06 PM

Expiration Date

Created By

Behmen Sanjana, 8/10/2011 5:07 PM

Last Modified By

Behmen Sanjana, 8/10/2011 5:07 PM

Edit | Delete | Back to Previous Page

Business Flow

Billing - Local

Each Business Flow activity must define what destination department must be assigned when TrackMe CASE STATUS is changed.

Customize Page | Printable View | Help for this Page

Details | Assign Dept by Case Status | Notes and Attachments | Change Log

Business Flow Steps

New Business Flow Step

Action	Business Flow Step Number	Status_To	Department	Effective Date	Expiration Date
☐	BFS-000071	Assigned	Billing - Local - Murphv	8/10/2011 5:09 PM	
☐	BFS-000076	Complete	Billing - HQ - Global	8/26/2011 5:25 PM	

New Business Flow Step

New Business Flow Step

Save | Back | Cancel

Information

Business Flow

Billing - Local

Department

-- Please Select --

Status_To

--None--

Effective Date

8/26/2011 5:37 PM

Expiration Date

8/26/2011 5:37 PM

Save | Back | Cancel

Business Flow Step Edit

Business Flow Step Edit

Save | Back | Cancel

Information

Business Flow

Billing - Local

Department

Billing - Local - Murphy

Status_To

Assigned

Effective Date

8/10/2011 5:09 PM

Expiration Date

8/26/2011 5:38 PM

Save | Back | Cancel

Business Flow Step

BFS-000071

Customize Page | Printable View | Help for this Page

Details | Notes and Attachments | Change Log

Business Flow Step Detail

Edit | Delete | Back to Previous Page | Back to Business Flow Step

Business Flow Step Number

BFS-000071

Business Flow

Billing - Local

Status_To

Assigned

Department

Billing - Local - Murphy

Effective Date

8/10/2011 5:09 PM

Expiration Date

Created By

Behmen Sanjana, 8/10/2011 5:09 PM

Last Modified By

Behmen Sanjana, 8/10/2011 5:09 PM

Edit | Delete | Back to Previous Page | Back to Business Flow Step

Page | 27

Business Flow View:

Sample Business-Flow and its associated child Business-Flow-Steps. In this case, a Business flow “Billing-Local” is defined for a specific location “L-0112 – Murphy, TX” and Case-Category or Request-Type of “Billing”. The corresponding Business-Flow-Steps are defined for Case Status – Assigned, and Complete. (You can also define assignment department for Case status as “Closed”). For each Target Case Status, a department is selected. Hence, when the case is created, it will be auto assigned to “Billing – Local - Murphy” department. Once this case status is changed to “Complete”, the case will be assigned to “Billing – HQ -Global”. Since there is no target department assigned for CASE STATUS = CLOSED, the case will remain in the last assigned Department or Group Bucket.

All

Edit | Delete | Create New View

New Business Flow

Change Owner

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

Action	Business Flow Name	Description	Location	Location Description	Request Type	Effective Date	Expiration Date
☐	Billing - Local	Auto assign the Billing ...	L-0112	Murphy,TX,75094-433...	Billing	8/10/2011 5:06 PM	

Billing - Local

Details about the Flow for the TrackMe Case that are of Type Billing and are for specific location.

Customize Page

Printable View

Help for this Page

Details

Assign Dept by Case Status

Notes and Attachments

Change Log

Business Flow Detail

Edit

Delete

Back to Previous Page

Business Flow Name	Billing - Local	Owner	Behmen Sanjana [Change]
Description	Auto assign the Billing issue for Murphy		
Location	L-0112		
Location Description	Murphy,TX,75094-4338,833 Morningside Trl,		
Request Type	Billing		
Effective Date	8/10/2011 5:06 PM		
Expiration Date			
Created By	Behmen Sanjana , 8/10/2011 5:07 PM		Last Modified By Behmen Sanjana , 8/10/2011 5:07 PM

Edit

Delete

Back to Previous Page

In case when Location is not selected at the time of creating this Business Flow then it is treated as a Global Flow.

Billing - Local

Each Business Flow activity must define what destination department must be assigned when TrackMe CASE STATUS is changed.
Note: More details on the Business Flow Step in next section.

Customize Page

Printable View

Help for this Page

Details

Assign Dept by Case Status

Notes and Attachments

Change Log

Business Flow Steps

New Business Flow Step

Action	Business Flow Step Number	Status_To	Department	Effective Date	Expiration Date
Edit Del	BFS-000071	Assigned	Billing - Local - Murphy	8/10/2011 5:09 PM	
Edit Del	BFS-000076	Complete	Billing - HQ - Global	8/26/2011 5:25 PM	

Billing - Local

Any special Notes or Attachment that you want to assign to this business flow.

Customize Page

Printable View

Help for this Page

Details

Assign Dept by Case Status

Notes and Attachments

Change Log

Notes & Attachments

New Note

Attach File

No records to display

Billing - Local

List of changes that are made to this specific Business Flow. It keeps an audit trail in the Change log tab.

Customize Page

Printable View

Help for this Page

Details

Assign Dept by Case Status

Notes and Attachments

Change Log

Date	Change	From	To	By
8/10/2011 5:07 PM	created			Behmen Sanjana

1.8 SLA – Priority & Service Level Agreement

Define the priority and its resolution time frame at Order, Department and User level. Service Level agreement time line can be defined for all Orders and Users in general. However, SLA at department level can be defined specific to a certain Department.

Create New or Edit Existing Priority and SLA:

Select the menu option “Priority and SLA” from the “TrackMeSetup” Tab.

- **“New”**: Select the button “New SLA” from the Service Level Agreement List Screen.
- **“Edit”**: Select “Edit” next to the existing under the “Action” column in the Service Level Agreement List Screen.
- **“View”**: Select the specific entry listed under the “SLA Priority” column.

The image displays three screenshots of the SLA management interface:

- Top Screenshot:** Shows the "Service Level Agreement List" table. The table has columns: Action, SLA Priority, SLA Hours, SLA Level, SLA Days, SLA Minutes, Expiration Date, Department, and Created Date. Two red boxes highlight the "New SLA" and "Edit" buttons.
- Middle-Left Screenshot:** Shows the "SLA Edit" form. The form has fields for: SLA Priority (set to "Low"), SLA Level (Department), SLA Days (0), SLA Hours, SLA Minutes (15), Department (Billing - Local - Murphy), and Expiration Date (8/30/2011 3:18 PM). Buttons for Save, Back, and Cancel are visible.
- Middle-Right Screenshot:** Shows the "New SLA" form. The form has fields for: SLA Priority, SLA Level (set to "Order"), SLA Days, SLA Hours, SLA Minutes, and Department. A red arrow points to the "SLA Level" dropdown with a text box explaining that SLA Priority can be created at Order, Case, Department, or User level, and for Department level, the specific Department or Group must be selected. Buttons for Save, Save & New, and Cancel are visible.
- Bottom Screenshot:** Shows the "SLA Detail" view for the "Low" priority. It displays the configured values and the user who created and last modified the SLA.

View Priority and SLA:

Select the menu option “Priority and SLA” from the “TrackMeSetup” tab.

“View”: Select the Priority listed under the “SLA Priority” Column on the List Screen. You can maneuver over the various TABs to view more details about its associated components.



All

Edit | Delete | Create New View



New SLA

Change Owner



A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

☐	Action	SLA Priority ↑	SLA Hours	SLA Level	SLA Days	SLA Minutes	Expiration Date	Department	Created Date
☐	Edit Del	Low		Order	365				8/10/2011
☐	Edit Del	Low		Department	0	15		Billing - Local - Murphy	8/10/2011

	SLA Low	Display the details of the Priority when selected from the above listing.								Customize Page Printable View Help for this Page
Details SLA Violator list Case List Department List Notes and Attachments Change Log										
SLA Detail										
		SLA Priority	Low			Owner	Behmen Sanjana [Change]			
		SLA Level	Department			Expiration Date				
		SLA Days	0							
		SLA Hours								
		SLA Minutes	15							
		Department	Billing - Local - Murphy							
		Created By	Behmen Sanjana, 8/10/2011 5:21 PM				Last Modified By	Behmen Sanjana, 8/19/2011 6:18 PM		

	SLA Low	List of SLA violator related to this particular selected Priority								Customize Page Printable View Help for this Page
Details SLA Violator list Case List Department List Notes and Attachments Change Log										
SLA Violations										
		New SLA Violation								
		Action	SLA Violation Number	Case	Order Assignment	Violation Date				
		Edit Del	V-000039	Q-00639	QA-000127	8/19/2011 6:03 PM				

	SLA Low	List Cases on which this Priority is assigned. Note: For Department level Priority, this tab will not display any data.								Customize Page Printable View Help for this Page
Details SLA Violator list Case List Department List Notes and Attachments Change Log										
TrackMeCases										
		New TrackMeCase								
		No records to display								

	SLA Low	List of TrackMe Case Assignments related to the selected Priority.								Customize Page Printable View Help for this Page
Details SLA Violator list Case List Department List Notes and Attachments Change Log										
Case Assignments										
		New Case Assignment								
		Action	Case Assignment Number	Department User	Fire SLA Violation	Expired	Case	Priority Modified Date		
		Edit Del	QA-000127		☐	NO	Q-00639	8/19/2011 6:01 PM		

	SLA Low	List of Notes and attachments if any.								Customize Page Printable View Help for this Page
Details SLA Violator list Case List Department List Notes and Attachments Change Log										
Notes & Attachments										
		New Note Attach File								
		No records to display								

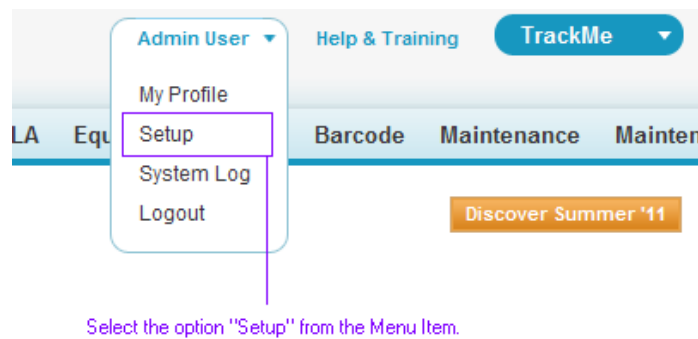
	SLA Low	List of change log. Keep track of any activity on this particular Priority entry.								Customize Page Printable View Help for this Page
Details SLA Violator list Case List Department List Notes and Attachments Change Log										
Change Log										
		Date	Change	From	To	By				
		8/10/2011 5:21 PM	created			Behmen Sanjana				
		8/19/2011 6:18 PM	SLA_Minutes__c		15.0	Behmen Sanjana				
		8/19/2011 6:18 PM	SLA_Days__c	365.0	0.0	Behmen Sanjana				

1.8.4 SLA Monitor

This item must be performed by the User that has System administrator privilege.

1.8.4.1 Check for the Batch Job that will monitor the SLA for the CASES with Priority.

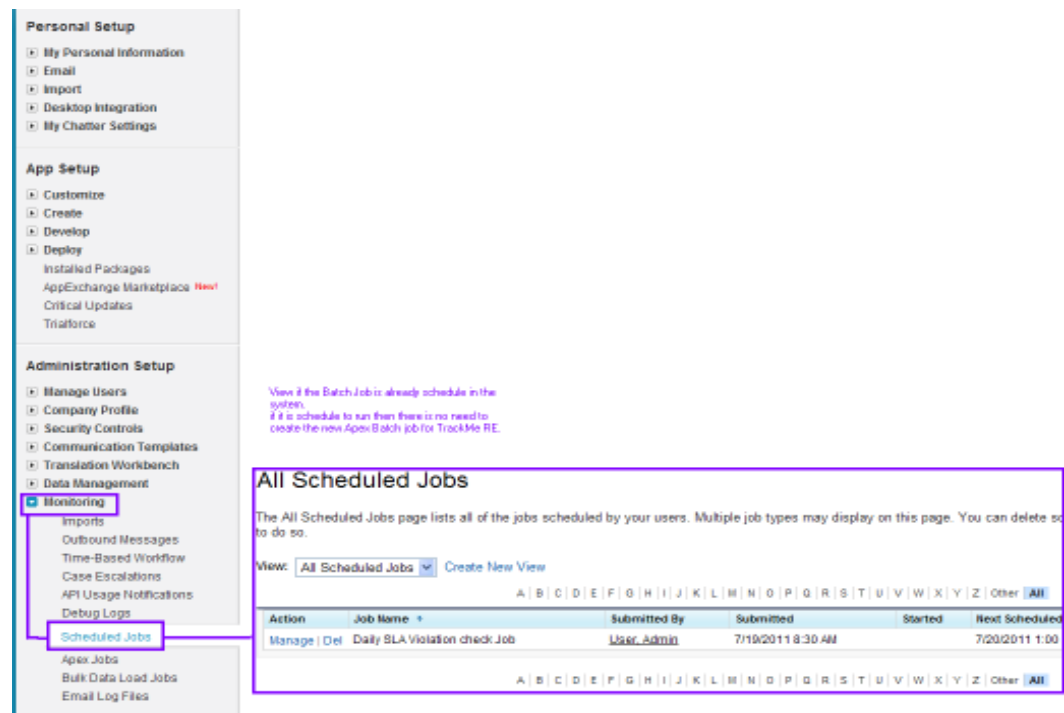
Step 1: Select “Setup” from the top Menu item.



Select the option "Setup" from the Menu Item.

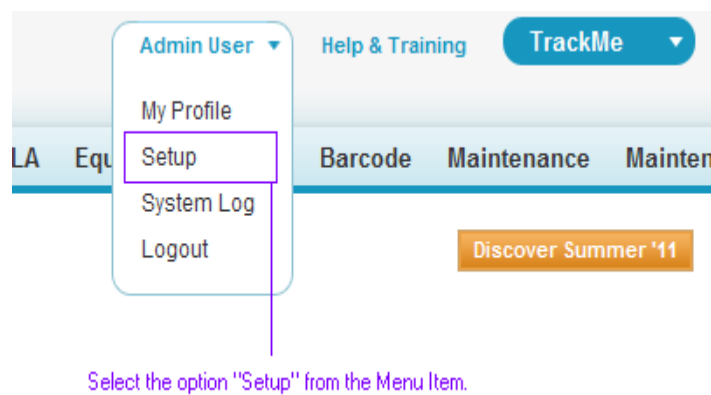
Step 2: From the Left hand menu, select the option “Monitoring” from the Administration Setup.

Step 3: Select the option “Schedule job” from the drop down menu under “Monitoring”. If a job is present in your environment, and it is active to run on a daily basis then you don’t have to perform the steps to create a new batch job.



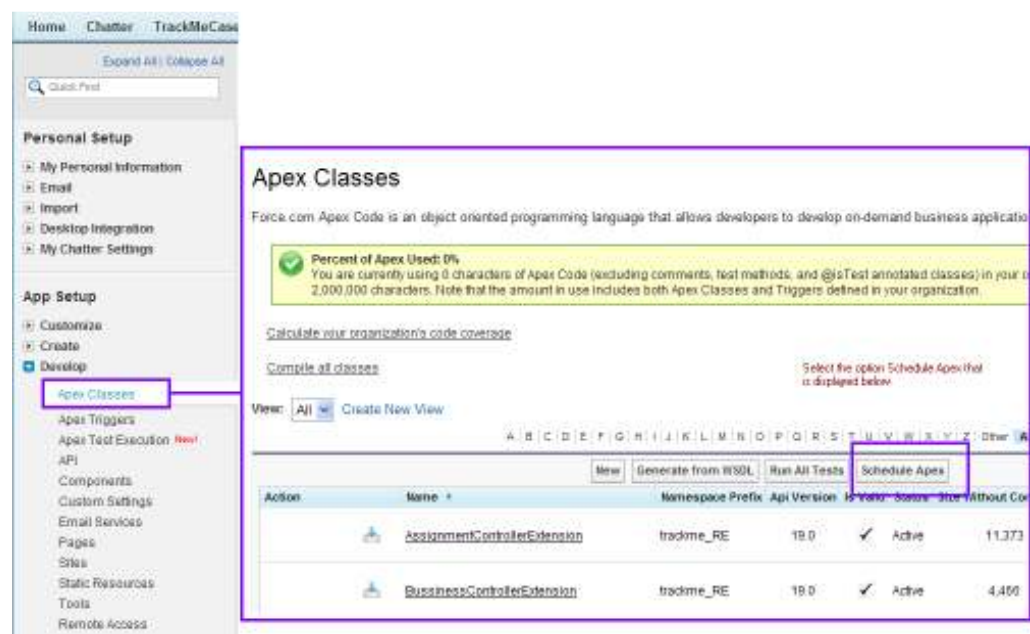
1.8.4.2 Create a New Batch Job to monitor the SLA for the CASES with Priority.

Step 1: Select “Setup” from the top Menu item.

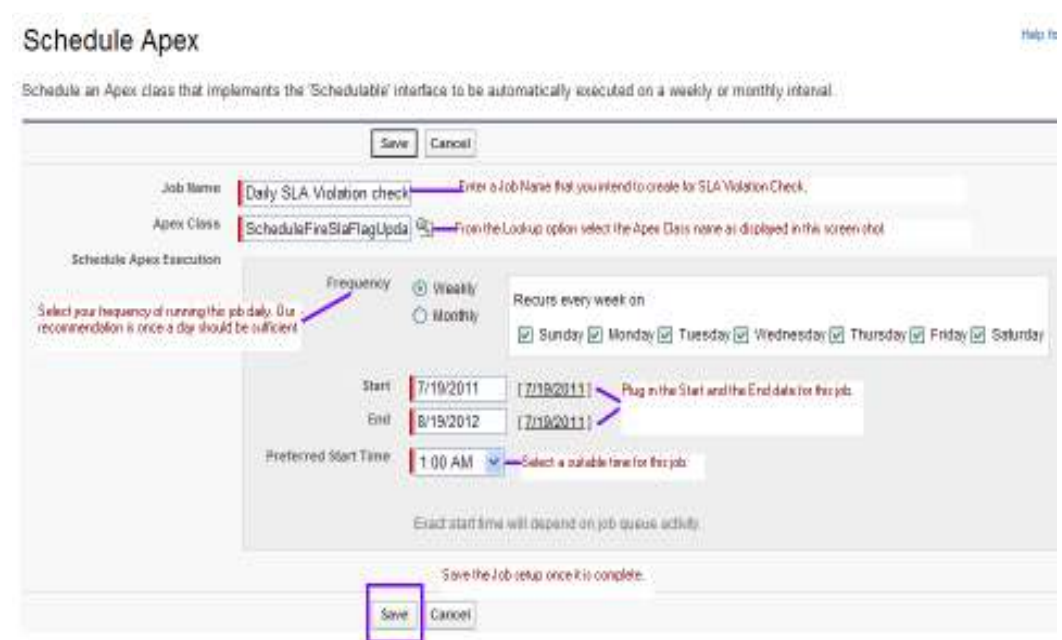


Step 2: Select the “APEX Class” option from the side Menu item under “Develop”.

Step 3: Select the button “Schedule Apex” from the Apex Classes.



Step 4: Create the new batch Job to monitor the SLA Violation. This job will review all open cases that has the SLA & Priority assigned on a daily basis. When a due date has passed for a case without any resolution then it will flag the TrackMe CASE for SLA Violation. This data will be reported on the Dashboard under the “SLA Violation by Location”.



1.9 Tenant Case Status

Define and identify the type of message you wish to send as a response to the case to an external tenant. It is advisable that predefined Status updates are created in this TAB so that Property Managers can communicate specific message to their client. The data from this TAB is available to the TrackMe Admin or Property Managers in the TrackMe Case Edit screen.

Create New or Edit Existing TENANT STATUS (Communication with Tenant):

Select the menu option “MAINTENANCE” from the “TrackMeMaintenanceSetup” TAB.

- **“New”**: Select the button “New MAINTENANCE” from the MAINTENANCE List Screen.
- **“Edit”**: Select “Edit” next to the existing case under the “Action” column in the MAINTENANCE List Screen.
- **“View”**: Select the specific entry listed under the “MACHINE MAINTENANCE ID” column.

The image displays three screenshots of a software interface, likely a case management system, showing the process of creating and editing a 'Tenant Case Status Response'.

Top Screenshot: List View

- Header: All | Edit | Delete | Create New View
- Buttons: New Tenant Case Status Response, Change Owner, Refresh
- Filter: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Status Name ↑	Message	Subject
☐ Edit Del	Authorization for Access	Need access to the equipment in o...	Authorization for Access
☐ Edit Del	Evaluating the Bill	Billing in progress. Will inform you ...	Currently evaluating the Billing iss...
☐ Edit Del	Name	Message Line	Subject Line

Middle-Left Screenshot: Edit Form (Authorization for Access)

- Header: Tenant Case Status Response Edit | Help for this Page
- Buttons: Save, Save & New, Cancel
- Section: Information (Required Information)

Status Name	Authorization for Access	Owner	Behmen Sanjana
Subject	Authorization for Access		
Message	Need access to the equipment in order to analyze the reported		

- Buttons: Save, Save & New, Cancel

Middle-Right Screenshot: Edit Form (New Tenant Case Status Response)

- Header: Tenant Case Status Response Edit | Help for this Page
- Buttons: Save, Save & New, Cancel
- Section: Information (Required Information)

Status Name		Owner	Behmen Sanjana
Subject			
Message			

- Buttons: Save, Save & New, Cancel

Bottom Screenshot: Details View (Authorization for Access)

- Header: Tenant Case Status Response | Details about the Standard Pre defined communication message. | Customize Page | Printable View | Help for this Page
- Tabs: Details | Case List | Notes and Attachments | Change Log
- Section: Tenant Case Status Response Detail
 - Buttons: Edit, Delete

Status Name	Authorization for Access	Owner	Behmen Sanjana [Change]
Subject	Authorization for Access		
Message	Need access to the equipment in order to analyze the reported issue and regular Maintenance. Please fax a letter providing your authorization to access the equipment located at your property location.		
Created By	Behmen Sanjana, 8/19/2011 6:30 PM	Last Modified By	Behmen Sanjana, 8/19/2011 6:30 PM

- Buttons: Edit, Delete

View Tenant Case Status:

Select the menu option “Tenant Case Status Response” from the “TrackMe Maintenance Setup” TAB.

“View”: Select the “Status Name” listed under the “STATUS NAME” Column on the List Screen. You can maneuver over the various TABS to view more details about its associated components.

All

Edit

Delete

Create New View

New Tenant Case Status Response

Change Owner

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

☐	Action	Status Name ↑	Message	Subject
☐	Edit Del	Authorization for Access	Need access to the equipment in order to...	Authorization for Access
☐	Edit Del	Evaluating the Bill	Billing in progress. Will inform you about ...	Currently evaluating the Billing issue.
☐	Edit Del	Name	Message Line	Subject Line

Tenant Case Status Response

Details regarding the Tenant Case Status Email communication Message.

Authorization for Access

Customize Page | Printable View | Help for this Page

Details

Case List

Notes and Attachments

Change Log

Tenant Case Status Response Detail

Edit

Delete

Status Name

Authorization for Access

Owner

Behmen Sanjana [Change]

Subject

Authorization for Access

Message

Need access to the equipment in order to analyze the reported issue and regular Maintenance. Please fax a letter providing your authorization to access the equipment located at your property location.

Created By

Behmen Sanjana, 8/19/2011 6:30 PM

Last Modified By

Behmen Sanjana, 8/19/2011 6:30 PM

Edit

Delete

Tenant Case Status Response

List of TrackMe Case where this communication is currently used.

Authorization for Access

Customize Page | Printable View | Help for this Page

Details

Case List

Notes and Attachments

Change Log

TrackMeCases

New TrackMeCase

Action	Case Number	Description	Priority	Status	Request Type	Department Assigned	Created Date	State	City	Address
Edit Del	O-00639	4th attempt at this page		Assigned	Billing	Billing - Local - Murphy	8/16/2011	TX	Murphy	833 Morningside Trl ,
Edit Del	O-00746	Double billing in month 8. Also see additional charge....		Assigned	Billing	Finance - Local	8/26/2011	TX	Murphy	833 Morningside Trl ,

Tenant Case Status Response

List of Notes and Attachment, if any.

Authorization for Access

Customize Page | Printable View | Help for this Page

Details

Case List

Notes and Attachments

Change Log

Notes & Attachments

New Note

Attach File

No records to display

Tenant Case Status Response

List of Audit log that keeps track of any changes made to the Communication record.

Authorization for Access

Customize Page | Printable View | Help for this Page

Details

Case List

Notes and Attachments

Change Log

Date	Change	From	To	By
8/19/2011 6:30 PM	created			Behmen Sanjana

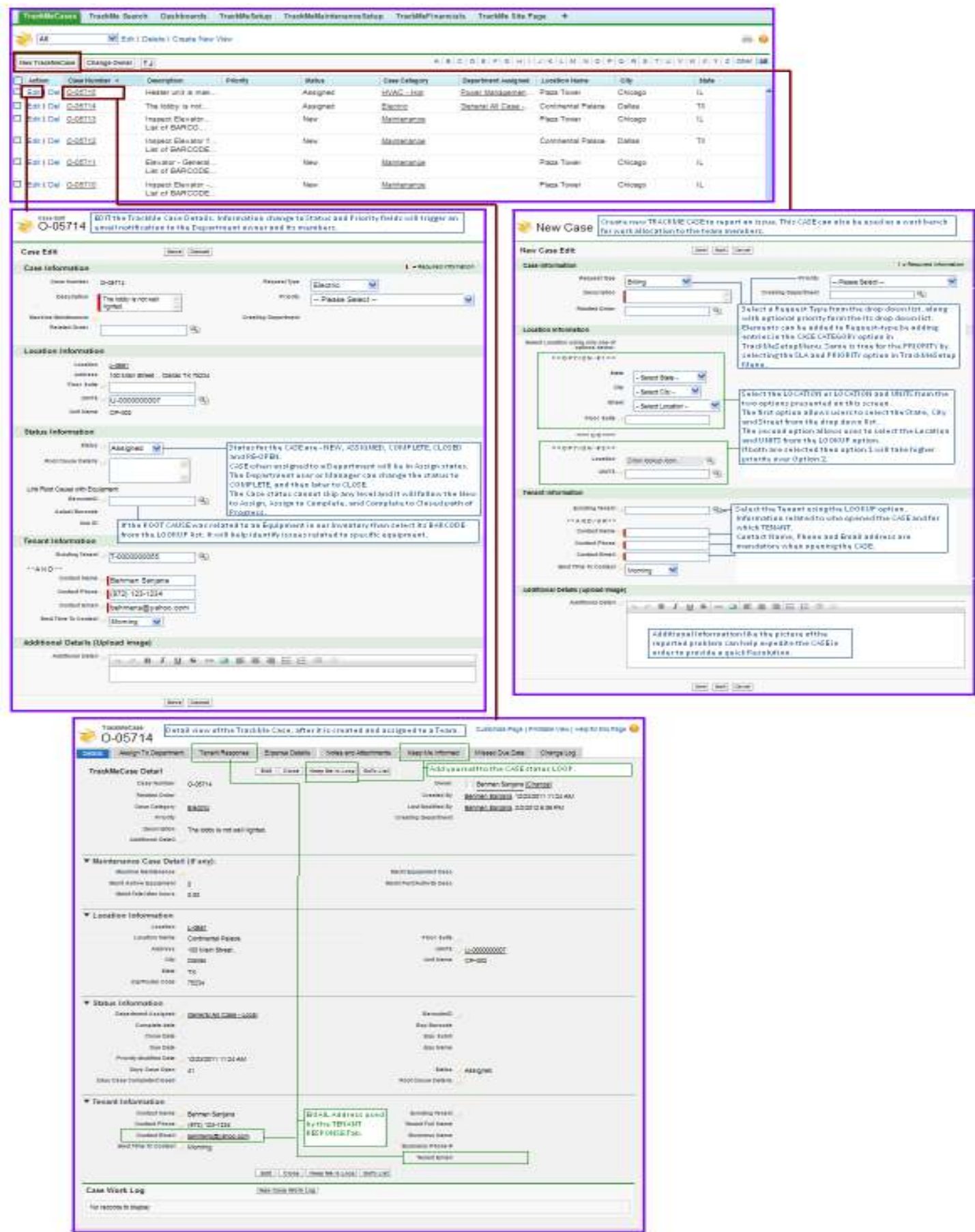
2 TrackMe CASES

Define and identify the cases that are in various stages of investigation and Resolution. New Cases are created by the users of TrackMe Application, along with the Tenant via the web interface. Cases are also created by the Equipment Maintenance process.

2.1 Create New or Edit Existing TrackMe Cases:

Select the tab “TrackMeCase” from the TrackMe Application.

- **“New”**: Select the button “New Case” from the TrackMe Cases List Screen.
- **“Edit”**: Select “Edit” next to the existing case under the “Action” column in the TrackMe Case List Screen.
- **“View”**: Select the specific entry listed under the “Case Number” column.



2.2 Case Assignment to a Department and User:

Once the case is created you can assign the cause from the Case Detail view page. Go to the TAB “Assign to Department” and select the button “New Department Assignment”. You can also assign a user once the department is assigned by selecting the “Add User Assignment” button. You will have to do this manual assignment when you want to transfer the case between teams. You will not have to perform this operation if there is an auto assignment Business Flow defined for this case for specific Case Status. In that case, just the change in Case Status will trigger the case to be assigned to the corresponding department defined under the Business Flow Step process.

TrackMeCases

Home

View: All

Got

Edit | Create New View

Recent TrackMeCases

New

Recently Viewed

Case Number	Description	Priority	Status	Case Category	Department Assigned	Created Date	State	City	Address
O-05714	The lobby is not well lighted.		Assigned	Electric	General All Case - Local	12/23/2011	TX	Dallas	100 Main Street.
O-04512	Clean and inspect Elevator for: EQUIPMENT = "Generator 7500". List of BARCODE/SUBID is listed in Additional Details section.		Closed	Maintenance		12/11/2011	IL	Chicago	300 South LakeView Drive.
O-05716	AC is not working		New	HVAC - Cold		1/6/2012	TX	Dallas	123 Main street.
O-05715	Heater unit is making lot of noise. Also saw smoke.		Assigned	HVAC - Hot	Power Management HQ	12/23/2011	IL	Chicago	300 South LakeView Drive.
O-05470	Elevator - General Maintenance for: EQUIPMENT = "Generator 7500". List of BARCODE/SUBID is listed in Additional Details section.		New	Maintenance		12/20/2011	IL	Chicago	300 South LakeView Drive.
O-04511	Power fluctuation		Assigned	Electric	Power Management HQ	12/11/2011	IL	Chicago	300 South LakeView Drive.
O-04510	Insufficient Light In the Fire escape Doorway.		Assigned	Electric	Power Management HQ	12/11/2011	TX	Dallas	100 Main Street.

TrackMeCase

O-05714

Customize Page | Printable View | Help for this Page

Details

Assign To Department

Tenant Response

Expense Details

Notes and Attachments

Keep Me Informed

Missed Due Date

Change Log

TrackMeCase Detail

Edit

Clone

Keep Me In Loop

Go To List

Case Number

O-05714

Owner

Behmen Sanjana (Change)

Related Order

Created By

Behmen Sanjana 12/23/2011 11:24 AM

Case Category

Electric

Last Modified By

Behmen Sanjana 2/2/2012 6:09 PM

Priority

Creating Department

Description

The lobby is not well lighted.

Additional Detail

Maintenance Case Detail (if any):

Machine Maintenance

Want Equipment Desc

Want Active Equipment

0

Want Part/Activity Desc

Want Total Man Hours

0.00

Location Information

Location

LOBBY

Floor Suite

Location Name

Continental Palace

UNIT S

LO0000000007

Address

100 Main Street.

Unit Name

CP-002

City

Dallas

State

TX

Zip/Postal Code

75234

Status Information

Department Assigned

General All Case - Local

BarcodeID

Complete Date

Eqp Barcode

Close Date

Eqp SubId

Use Date

Eqp Name

Priority Modified Date

12/23/2011 11:24 AM

Status

Assigned

Days Case Open

41

Root Cause Details

Days Case Complete/Closed

Tenant Information

Contact Name

Behmen Sanjana

Escorting Tenant

Contact Phone

(972) 123-1234

Tenant Full Name

Contact Email

behmens@yahoo.com

Business Name

Start Time To Contact

Morning

Business Phone #

Tenant Email

Case Work Log

New Case Work Log

No records to display

TrackMeCase

O-05714

CASE Assignment function to various DEPARTMENTS and USERS under those Departments.

Customize Page | Printable View | Help for this Page

Details

Assign To Department

Tenant Response

Expense Details

Notes and Attachments

Keep Me Informed

Missed Due Date

Change Log

Case Assignments

New Department Assignment

New User Assignment

Action	Case Assignment Number	Level	Priority	Department	Assigned User	Expiration Date	Use Date
Edit Del	QA0000770	User		General All Case - Local	BS AdminTest		
Edit Del	QA0000768	Department		General All Case - Local			
Edit Del	QA0000761	Department		Power Management HQ		2/2/2012 6:09 PM	

Case Assignment

New

Details regarding new assignment to a new Department other than the one that is currently assigned.

Case Assignment Detail

Save

Cancel

Case Assignment Information

Required Information

Case

O-05714

Department

-- Please Select --

Priority

-- Please Select --

Save

Cancel

Select the new Department from the Pick list. Departments that are local to this location and those that are Global will be displayed in the drop down list.

Case Assignment

New

Details regarding the new assignment to a new USER that is the member of the Department (in this case - "General All Case-Local").

Case Assignment Detail

Save

Cancel

Case Assignment Information

Required Information

Case

O-05714

Department

General All Case - Local

User

-- Please Select --

Priority

-- Please Select --

Save

Cancel

Select the User for the pick List. Members of the "General All Case-Local" department will be listed for selection.

2.3 View TrackMe Case:

Select the TAB “TrackMe Cases” from the TrackMe Application.

“View”: Select the “Case Number” listed under the “Case Number” Column on the List Screen. You can maneuver over the various TABs to view more details about its associated components.

TrackMeCasesTrackMe SearchDashboardsTrackMeSetupTrackMeMaintenanceSetupTrackMeFinancialsTrackMe Site Page

AllEdit | Delete | Create New View

Action

Edit | Del

Edit | Del

Edit | Del

Edit | Del

Edit | Del

Edit | Del

Case Number

Q-05714

Q-05714

Q-05713

Q-05712

Q-05711

Q-05710

Description

Heater unit is mak...

The lobby is not...

Inspect Elevator... List of BARCO...

Inspect Elevator f... List of BARCODE...

Elevator - General... List of BARCODE...

Inspect Elevator ... List of BARCODE...

Priority

Status

Assigned

Assigned

New

New

New

Case Category

HVAC - Hot

Electric

Maintenance

Maintenance

Maintenance

Department Assigned

Power Managemen ...

(General All Case...

Location Name

Plaza Tower

Continental Palace

Plaza Tower

Continental Palace

Plaza Tower

City

Chicago

Dallas

Chicago

Dallas

Chicago

State

IL

TX

IL

TX

IL

DETAIL VIEW OF THE SELECTED TRACKME CASE. Details about the various TABs are as follows.

Customize Page | Printable View | Help for this Page

DetailsAssign To DepartmentTenant ResponseExpense DetailsNotes and AttachmentsKeep Me InformedMissed Due DateChange Log

TrackMeCase

Q-05714

Case Number

Q-05714

Related Order

Case Category

Electric

Description

The lobby is not well lighted.

Additional Detail

Maintenance Case Detail (if any):

Location Information

Status Information

Tenant Information

Case Work Log

DetailsAssign To DepartmentTenant ResponseExpense DetailsNotes and AttachmentsKeep Me InformedMissed Due DateChange Log

TrackMeCase

Q-05714

List of all the department that are assigned to this CASE. Entries that have Expiration Date populated means that the case no longer is assigned to that department.

Case Assignments

Tenant Response

DetailsAssign To DepartmentTenant ResponseExpense DetailsNotes and AttachmentsKeep Me InformedMissed Due DateChange Log

TrackMeCase

Q-05714

List of Response that are sent to the Tenant or a waiting to be sent to the Tenant.

Tenant Response

Tenant Response Detail

DetailsAssign To DepartmentTenant ResponseExpense DetailsNotes and AttachmentsKeep Me InformedMissed Due DateChange Log

TrackMeCase

Q-05714

List of all the Expenses incurred for resolving this CASE.

Account Payable

Notes & Attachments

DetailsAssign To DepartmentTenant ResponseExpense DetailsNotes and AttachmentsKeep Me InformedMissed Due DateChange Log

TrackMeCase

Q-05714

List of any additional NOTES and Attachment for the CASE.

Notes & Attachments

DetailsAssign To DepartmentTenant ResponseExpense DetailsNotes and AttachmentsKeep Me InformedMissed Due DateChange Log

TrackMeCase

Q-05714

List of the Users of the TrackMe application that has opted to receive email communication for this CASE.

Keep Me In Loops

DetailsAssign To DepartmentTenant ResponseExpense DetailsNotes and AttachmentsKeep Me InformedMissed Due DateChange Log

TrackMeCase

Q-05714

List of all the SLA Violations that have occured for this CASE. The information here depends on the PRIORITY selected for the CASE.

SLA Violations

DetailsAssign To DepartmentTenant ResponseExpense DetailsNotes and AttachmentsKeep Me InformedMissed Due DateChange Log

TrackMeCase

Q-05714

List of all the Changes performed to the CASE Details. Keeps and Audit Trail at the Field level to ensure accuracy.

Change Log

3 TrackMe Maintenance Setup Menu

Menu Option created to group the Maintenance Related items under one topic. From this Menu Option, you can create and edit Master entries for Equipment, Parts or Activity, Barcode (inventory), and, Maintenance Schedule.

TrackMeCasesTrackMe SearchDashboardsTrackMeSetupTrackMeMaintenanceSetupTrackMeFinancialsTrackMe Site Page+

TrackMe MAINTENANCE - SETUP

▼ Equipment or Machine Management

EQUIPMENT

CREATE and MODIFY information related to an EQUIPMENT.

▼ Parts or Activity Management

PARTS or ACTIVITY

CREATE and MODIFY information related to PARTS or ACTIVITY (like General Maintenance, Cleaning, and, so on.).

▼ BARCODE (Inventory) Management

BARCODE/EQUIPMENT INVENTORY

CREATE and MODIFY information related to BARCODE that is defined for each EQUIPMENT for a specific Location. BARCODE is a unique identifier of an Equipment that is installed and located at a specific Location.

▼ Maintenance Record Management

PREVENTIVE MAINTENANCE

CREATE and MODIFY information related to the Maintenance records used for creating the Case. Each Maintenance Record is made up of: Equipment, Parts or Activity, BARCODE for a specific property Location.

▼ Maintenance History Records Management

MAINTENANCE HISTORY

VIEW historical information related to Maintenance Records. This repository will display all the closed cases for individual Maintenance Records. Priority can be defined at Case level and Department Level. In case, if the CASE having the defined priority is not resolved in the defined timeframe then a SLA Violation will be created and published on the Dashboard.

3.1 EQUIPMENT

Define and identify the Asset that is eligible for Periodic maintenance. An asset can be any item that requires periodic maintenance. This is a Master setup and unique equipment must be entered in this Tab. Please ensure that the description used for defining the equipment is sufficient enough to classify a certain type of equipment. Say for example, if you have Air-conditioning equipment that are of different type then please ensure that proper description is assigned to them so that they can be identified easily.

Note: The term Equipment and Machine is used in the TrackMe Application. They both mean the same.

Create New or Edit Existing Equipment Master:

Select the menu option “Equipment” from the “TrackMeMaintenanceSetup” TAB.

- **“New”**: Select the button “New Equipment” from the Equipment Master List Screen.
- **“Edit”**: Select “Edit” next to the existing case under the “Action” column in the Equipment Master List Screen.
- **“View”**: Select the specific entry listed under the “Machine Master ID” column.

TrackMe MAINTENANCE - SETUP

Equipment or Machine Management

EQUIPMENT

CREATE and MODIFY information related to an EQUIPMENT.

All Edit Delete Create New View

New Equipment Change Owner

Action	Equipment ID *	Description	Detail Record Count	Inventory Count	Created Date
Edit Del	M-000000523	Stiebel Eltron Temptra 24...	4	3	2/8/2012
Edit Del	M-0385	Elevator 7500x	4	5	12/11/2011

Equipment Edit Edit an existing EQUIPMENT Record.

M-0385

Equipment Edit

Save Save & New Cancel

Information

Equipment ID M-0385 Owner Behmen Sanjana

Description Elevator 7500x

Save Save & New Cancel

Equipment Edit Create New Equipment Record.

New Equipment

Equipment Edit

Save Save & New Cancel

Information

Description

Owner Behmen Sanjana

Save Save & New Cancel

Equipment View a existing EQUIPMENT Detail Record.

M-0385

Customize Page Printable View Help for this Page

Details Notes and Attachments Installation Locations Equipment Maint. Records Old Maint. History Change Log

Equipment Detail

Edit Clone Back to Previous Page GoTo List

Information

Equipment ID M-0385 Owner Behmen Sanjana

Description Elevator 7500x

Detail Record Count 4

Inventory Count 5

Created By Behmen Sanjana 12/11/2011 12:37 PM

Last Modified By Behmen Sanjana 2/2/2012 9:13 PM

Edit Clone Back to Previous Page GoTo List

Related Details

New Equipment Detail

Action	Equipment Detail ID	Attribute	Value
Edit Del	MD-0005	Model	7500
Edit Del	MD-0006	Warranty	18 Months from Purchase date.
Edit Del	MD-0007	Contact Ph. No.	888.876.0987
Edit Del	MD-0008	Maintenance Contract	Skyline LLC, 100 Victory Plaza, Dallas, TX 75231

Create New or Edit Existing Equipment Detail:

Equipment details are added so that unlimited information can be attached to the Equipment Master record. Information related to Manufacturer, Warranty, Contact, Model, Type, and, so on, can be added as detail records.

Equipment details can be accessed from the Equipment Master View detail page. All relevant information is listed under the TAB “Relevant Details”.

- **“New”**: Select the button “New Equipment Detail” from the Equipment Master -> “Related Details” Tab.
- **“Edit”**: Select “Edit” next to the existing case under the “Action” column in the Equipment Details List Screen.
- **“View”**: Select the specific entry listed under the “Machine Detail Record Name” column.

TrackMe MAINTENANCE - SETUP

Equipment or Machine Management

EQUIPMENT

CREATE and MODIFY information related to an EQUIPMENT.

All

Edit

Delete

Create New View

New Equipment

Change Owner

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

Action	Equipment ID	Description	Detail Record Count	Inventory Count	Created Date
☐ Edit Del	M-000000523	Stiebel Eltron Tempa 24...	4	3	2/6/2012
☐ Edit Del	M-0385	Elevator 7500x	4	5	12/11/2011

Equipment M-0385

Detail Display for the Selected Equipment.

Customize Page

Printable View

Help for this Page

Details

Notes and Attachments

Installation Locations

Equipment Maint. Records

Old Maint. History

Change Log

Equipment Detail

Edit

Clone

Back to Previous Page

Go to List

Information

Equipment ID: M-0385

Owner: Behmen Sanjana

Description: Elevator 7500x

Detail Record Count: 4

Inventory Count: 5

Created By: Behmen Sanjana, 12/11/2011 12:37 PM

Last Modified By: Behmen Sanjana, 2/2/2012 9:13 PM

Related Details

New Equipment Detail

Action	Equipment Detail ID	Attribute	Value
☐ Edit Del	MD-0005	Model	7500
☐ Edit Del	MD-0006	Warranty	18 Months from Purchase date.
☐ Edit Del	MD-0007	Contact Ph. No.	888.876.0987
☐ Edit Del	MD-0008	Maintenance Contract	Skylift LLC, 100 Victory Plaza, Dallas, TX 75231

Equipment Detail Edit MD-0008

Edit the Detail record pertaining to Equipment Details.

Help for this Page

Equipment Detail Edit

Save

Save & New

Cancel

Information

Equipment Detail ID: MD-0008

Equipment: M-0385

Attribute: Maintenance Contract

Value: Skylift LLC, 100 Victory Plaza, Dallas, TX 75231

Save

Save & New

Cancel

Equipment Detail Edit New Equipment Detail

Create New Detail Record for Equipment.

Help for this Page

Equipment Detail Edit

Save

Save & New

Cancel

Information

Equipment: M-0385

Attribute:

Value:

Save

Save & New

Cancel

Equipment Detail MD-0008

View the Detail Equipment Record.

Customize Page

Printable View

Help for this Page

Details

Notes and Attachments

Change Log

Equipment Detail Detail

Edit

Clone

Back to Previous Page

Back To Equipment

Information

Equipment Detail ID: MD-0008

Equipment: M-0385

Attribute: Maintenance Contract

Value: Skylift LLC, 100 Victory Plaza, Dallas, TX 75231

Created By: Behmen Sanjana, 2/2/2012 9:13 PM

Last Modified By: Behmen Sanjana, 2/2/2012 9:13 PM

Edit

Clone

Back to Previous Page

Back To Equipment

View Equipment:

Select the menu option “Equipment” from the “TrackMe Maintenance Setup” TAB.

“View”: Select the “Equipment” listed under the “Machine Master ID” Column on the List Screen. You can maneuver over the various TABs to view more details about its associated components.

TrackMe MAINTENANCE - SETUP

Equipment or Machine Management

EQUIPMENT

CREATE and MODIFY information related to an EQUIPMENT.

All Edit Delete Create New View

New Equipment Change Owner

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Action	Equipment ID	Description	Detail Record Count	Inventory Count	Created Date
Edit Del	M-000000523	Stiebel Eltron Temptra 24...	4	3	2/6/2012
Edit Del	M-0385	Elevator 7500x	4	5	12/11/2011

Equipment M-0385

Detail about the Selected Equipment. More details about the various Tabs.

Details Notes and Attachments Installation Locations Equipment Maint. Records Old Maint. History Change Log

Equipment Detail

Information

Equipment ID M-0385 Owner Behmen Sanjana

Description Elevator 7500x

Detail Record Count 4

Inventory Count 5

Created By Behmen Sanjana, 12/11/2011 12:37 PM

Last Modified By Behmen Sanjana, 2/2/2012 9:13 PM

Related Details

Action	Equipment Detail ID	Attribute	Value
Edit Del	MD-0005	Model	7500
Edit Del	MD-0006	Warranty	18 Months from Purchase date.
Edit Del	MD-0007	Contact Ph. No.	888.876.0987
Edit Del	MD-0008	Maintenance Contract	Skylift LLC, 100 Victory Plaza, Dallas, TX 75231

Equipment M-0385

List of Notes and Attachment associated for this particular Equipment.

Details Notes and Attachments Installation Locations Equipment Maint. Records Old Maint. History Change Log

Notes & Attachments

Action	Type	Title	Last Modified	Created By
Edit Del	Note	Manufacturer Instruction	2/6/2012 10:22 PM	Behmen Sanjana

Equipment M-0385

List of individual equipment that is installed at various Location. Each equipment installed is uniquely identified with BARCODE ID/Inventory ID and SUB-ID.

Details Notes and Attachments Installation Locations Equipment Maint. Records Old Maint. History Change Log

Barcode

Action	Barcode/Equipment Inventory: Name	Barcode/Inventory ID	Additional Inventory ID/SUB ID	Location ID	Location Description	Expiration date
Edit Del	MB-0000383	11123456789	1N-001	L-0692	Chicago,IL 61001,300 South LakeView Drive.	
Edit Del	MB-0000385	99923456789	1C-001	L-0691	Dallas,TX,75234,100 Main Street.	
Edit Del	MB-0000384	22223456789	1N-002	L-0692	Chicago,IL 61001,300 South LakeView Drive.	
Edit Del	MB-0000497	1110987654321	East-001	L-0691	Dallas,TX,75234,100 Main Street.	
Edit Del	MB-0000495	1119876543210	East-002	L-0691	Dallas,TX,75234,100 Main Street.	

Equipment M-0385

List of unique Maintenance items that is scheduled for this Equipment at various Locations.

Details Notes and Attachments Installation Locations Equipment Maint. Records Old Maint. History Change Log

Maintenance

Action	Machine Maintenance ID	Description	Last Case Close Date	Last case creation Date	Location ID	Location Description	Next Scheduled Maintenance
Edit Del	MM-0381	Clean and Inspect Elevator	1/24/2012 12:39 PM	1/24/2012 12:00 PM	L-0692	Chicago,IL 61001,300 South LakeView Drive.	2/23/2012 12:00 PM
Edit Del	MM-0387	Elevator - General Maintenance	12/19/2011 12:03 PM	1/24/2012 12:00 PM	L-0692	Chicago,IL 61001,300 South LakeView Drive.	2/23/2012 12:00 PM
Edit Del	MM-0358	Inspect Elevator	12/19/2011 12:02 PM	1/24/2012 12:00 PM	L-0691	Dallas,TX,75234,100 Main Street.	2/23/2012 12:00 PM
Edit Del	MM-0359	Inspect Elevator - Chicago	12/18/2011 12:02 PM	1/24/2012 12:00 PM	L-0692	Chicago,IL 61001,300 South LakeView Drive.	2/23/2012 12:00 PM

Equipment M-0385

List of Maintenance History that is completed for this Equipment at a specific Location.

Details Notes and Attachments Installation Locations Equipment Maint. Records Old Maint. History Change Log

MaintenanceHistorys

Action	Maintenance_ History_ID	Location ID	Location Description	Order	Parts ID	Parts Description	Activity	Reason
Edit Del	MH-0117	L-0692	Chicago,IL 61001,300 South LakeView Drive.	Q-04512	P-00272	Elevator - General Maintenance	Case Closed	Maintenance is complete

Equipment M-0385

List of Change history for the Equipment record. It keeps an audit trial of any changes made to the Equipment record.

Details Notes and Attachments Installation Locations Equipment Maint. Records Old Maint. History Change Log

Date	Change	From	To	By
2/2/2012 9:11 PM	trackme_RE__Description__c	Generator 7500x	Elevator 7500x	Behmen Sanjana
12/11/2011 12:37 PM	created			Behmen Sanjana

3.2 PARTS OR ACTIVITY

Define and identify the Parts or Activity that is required to perform maintenance on Equipment. A part can be goods as well as service. In our case, a part can be any element used for regular maintenance. Like Oil, grease, Electrical cable, bulbs, air filter, water filter, and, so on. A service can be activity like general maintenance, or, schedule cleaning. Similar to Equipment, please ensure that the description defining the Part can be self explanatory and well defined. One more thing, Parts is independent to any equipment record. In the Maintenance setup, you will be able to relate the Equipment with a Part.

Create New or Edit Existing Parts Master:

Select the menu option “Parts or Activity” from the “TrackMeMaintenanceSetup” TAB.

- **“New”**: Select the button “New Parts or Activity” from the Parts Master List Screen.
- **“Edit”**: Select “Edit” next to the existing case under the “Action” column in the Parts Master List Screen.
- **“View”**: Select the specific entry listed under the “Parts Master ID” column.

TrackMeCasesTrackMe SearchDashboardsTrackMe SetupTrackMeMaintenanceSetupTrackMeFinancialsTrackMe Site Page

TrackMe MAINTENANCE - SETUP

▼ Parts or Activity Management

PARTS or ACTIVITY

CREATE and MODIFY information related to PARTS or ACTIVITY (like General Maintenance, Cleaning, and, so on.).

AllEdit | Delete | Create New View

New PartsChange Owner

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

Action	Parts_Activity_ID ↑	Description	Detail Count	Created Date
☐ Edit Del	P-000000378	HVAC - Filters 20x24	3	2/3/2012
☐ Edit Del	P-000000379	Watts LFTWH-Foot-HCN Tankless...	2	2/6/2012
☐ Edit Del	P-00272	Elevator - General Maintenance	1	12/11/2011
☐ Edit Del	P-00273	Test Emergency Protocol	1	12/11/2011

Parts EditP-00273Edit existing PARTS or ACTIVITY record.

Parts Edit

SaveSave & NewCancel

Information

Parts_Activity_IDP-00273OwnerBehmen Sanjana

DescriptionTest Emergency Proto

SaveSave & NewCancel

Parts EditNew PartsCreate new PARTS or ACTIVITY Record

Parts Edit

SaveSave & NewCancel

Information

DescriptionOwnerBehmen Sanjana

SaveSave & NewCancel

PartsP-00273View a specific PARTS or ACTIVITY Details.

Customize Page | Printable View | Help for this Page

DetailsNotes and AttachmentsDeployed In MaintenanceOld Maint. HistoryChange Log

Parts Detail

Parts_Activity_IDP-00273OwnerBehmen Sanjana

DescriptionTest Emergency ProtocolCreated ByBehmen Sanjana, 12/11/2011 12:38 PM

Detail Count1Last Modified ByBehmen Sanjana, 2/2/2012 9:21 PM

EditCloneBack to Previous PageGo To List

Related Details

New Parts or Activity

Action	Parts/Activity Detail ID	Attribute	Value
Edit Del	PD-00003	Procedure	17 points inspection. Plus check on electronics, Emergency lights and ventilations, Cable strength, and Brake pads. Check fire escape hatch.

Page | 42

Create New or Edit Existing PARTS or ACTIVITY DETAILS:

PARTS or ACTIVITY details are added so that unlimited information can be attached to the Parts Master record. Information related to Manufacturer, Warranty, Contact, Model, Type, and, so on, can be added as Parts detail records.

PARTS or ACTIVITY details can be accessed from the PARTS or ACTIVITY Master View detail page. All relevant information is listed under the TAB “Relevant Details”.

- **“New”**: Select the button “New Parts or Activity” from the PARTS or ACTIVITY -> “Related Details” Tab.
- **“Edit”**: Select “Edit” next to the existing case under the “Action” column in the Parts Details List Screen.
- **“View”**: Select the specific entry listed under the “Part Detail ID” column.

TrackMeCasesTrackMe SearchDashboardsTrackMe SetupTrackMeMaintenance SetupTrackMeFinancialsTrackMe Site Page+

TrackMe MAINTENANCE - SETUP

▼ Parts or Activity Management

PARTS or ACTIVITY

CREATE and MODIFY information related to PARTS or ACTIVITY (like General Maintenance, Cleaning, and, so on.).

AllEdit | Delete | Create New View

New PartsChange Owner

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Parts_Activity_ID	Description	Detail Count	Created Date
Edit Del	P-000000378	HVAC - Filters 20x24	3	2/3/2012
Edit Del	P-000000379	Watts LFTWH-Foot-HCN Tankless...	2	2/6/2012
Edit Del	P-00272	Elevator - General Maintenance	1	12/11/2011
Edit Del	P-00273	Test Emergency Protocol	1	12/11/2011

Parts

P-00273

Customize Page | Printable View | Help for this Page

DetailsNotes and AttachmentsDeployed in MaintenanceOld Maint. HistoryChange Log

Parts Detail

EditCloneBack to Previous PageGo To List

Parts_Activity_IDP-00273OwnerBehmen Sanjana [Change]

DescriptionTest Emergency ProtocolCreated ByBehmen Sanjana, 12/11/2011 12:38 PM

Detail Count1Last Modified ByBehmen Sanjana, 2/2/2012 9:21 PM

EditCloneBack to Previous PageGo To List

Related Details

New Parts or Activity

Action	Parts/Activity Detail ID	Attribute	Value
Edit Del	PD-00003	Procedure	17 points inspection. Plus check on electronics, Emergency lights and ventilations, Cable strength, and Brake pads. Check fire escape hatch.

Parts or Activity Edit

PD-00003

Edit the existing Details about the PARTS or ACTIVITY record.

Help for this Page

Parts or Activity Edit

SaveSave & NewCancel

Information

Parts/Activity Detail IDPD-00003

Parts IDP-00273

AttributeProcedure

Value17 points inspection. Plus check on electronics,

SaveSave & NewCancel

Parts or Activity Edit

New Parts or Activity

Add new details to the PARTS or ACTIVITY Record.

Help for this Page

Parts or Activity Edit

SaveSave & NewCancel

Information

Parts IDP-00273

Attribute

Value

Attribute field identifies the contents in the Value field. It hold the identifier for the detail data in value.

SaveSave & NewCancel

Parts or Activity

PD-00003

Detail view of the PARTS or ACTIVITY RELATED DETAILS record for view.

Customize Page | Printable View | Help for this Page

DetailsNotes and AttachmentsChange Log

Parts or Activity Detail

EditCloneBack to Previous PageBack To Parts/Activity

Parts/Activity Detail IDPD-00003

Parts IDP-00273

AttributeProcedure

Value17 points inspection. Plus check on electronics, Emergency lights and ventilations, Cable strength, and Brake pads. Check fire escape hatch.

Last Modified ByBehmen Sanjana, 2/2/2012 9:21 PM

Created ByBehmen Sanjana, 2/2/2012 9:21 PM

EditCloneBack to Previous PageBack To Parts/Activity

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View Parts or Activity:

Select the menu option “Parts or Activity” from the “TrackMe Maintenance Setup” TAB.

“View”: Select the “Parts of Activity” listed under the “Parts Master ID” Column on the List Screen. You can maneuver over the various TABs to view more details about its associated components.

TrackMeCasesTrackMe SearchDashboardsTrackMeSetupTrackMeMaintenanceSetupTrackMeFinancialsTrackMe Site Page+

TrackMe MAINTENANCE - SETUP

▼ Parts or Activity Management

PARTS or ACTIVITY

CREATE and MODIFY information related to PARTS or ACTIVITY (like General Maintenance, Cleaning, and, so on.).

All

Edit | Delete | Create New View

New PartsChange Owner

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Parts_Activity_ID	Description	Detail Count	Created Date
Edit Del	P-000000378	HVAC - Filters 20x24	3	2/3/2012
Edit Del	P-000000379	Watts LFTWH-Foot-HCN Tankless...	2	2/6/2012
Edit Del	P-00272	Elevator - General Maintenance	1	12/11/2011
Edit Del	P-00273	Test Emergency Protocol	1	12/11/2011

Parts

P-00273

View the PARTS or ACTIVITY details and the Content of each TAB.

Details

Notes and AttachmentsDeployed In MaintenanceOld Maint. HistoryChange Log

Parts Detail

Parts_Activity_ID

P-00273

Owner

Behmen Sanjana

Change

Description

Test Emergency Protocol

Created By

Behmen Sanjana

12/11/2011 12:38 PM

Detail Count

1

Last Modified By

Behmen Sanjana

2/2/2012 9:21 PM

EditCloseBack to Previous PageGo To List

EditCloseBack to Previous PageGo To List

Related Details

New Parts or Activity

Action	Parts/Activity Detail ID	Attribute	Value
Edit Del	PD-00003	Procedure	17 points inspection. Plus check on electronics, Emergency lights and ventilations, Cable strength, and Brake pads. Check fire escape hatch.

Parts

P-00273

List of Notes and Attachment related to this PARTS or ACTIVITY.

Details

Notes and AttachmentsDeployed In MaintenanceOld Maint. HistoryChange Log

Notes & Attachments

New NoteAttach FileView All

Action	Type	Title	Last Modified	Created By
Edit Del	Note	Test Manual	2/7/2012 7:58 PM	Behmen Sanjana

Parts

P-00273

List of MAINTENANCE RECORDS where this PARTS or ACTIVITY is deployed or Used or Performed.

Details

Notes and AttachmentsDeployed In MaintenanceOld Maint. HistoryChange Log

Maintenance

New Maintenance

Action	Machine Maintenance ID	Description	Last Case Close Date	Last case creation Date	Location ID	Location Description	Equipment ID	Equipment Description	Next Scheduled Maintenance
Edit Del	MM-0358	Inspect Elevator	12/19/2011 12:02 PM	1/24/2012 12:00 PM	L-0691	Dallas,TX,75234,100 Main Street,	M-0385	Elevator 7500x	2/23/2012 12:00 PM
Edit Del	MM-0359	Inspect Elevator - Chicago	12/18/2011 12:02 PM	1/24/2012 12:00 PM	L-0692	Chicago,IL,61001,300 South LakeView Drive,	M-0385	Elevator 7500x	2/23/2012 12:00 PM

Parts

P-00273

List of Historical Maintenance TrackMe CASES where this PART or ACTIVITY was used or performed. Only the TrackMeCases that are Closed will appear in this TAB.

Details

Notes and AttachmentsDeployed In MaintenanceOld Maint. HistoryChange Log

MaintenanceHistorys

New MaintenanceHistory

Action	Maintenance_History_ID	Location ID	Location Description	Order	Machine Master	Machine Description	Parts Description	Activity	Reason
Edit Del	MH-0118	L-0692	Chicago,IL,61001,300 South LakeView Drive,	O-05472	M-0385	Elevator 7500x	Test Emergency Protocol	Case Closed	Maintenance activity is complete

Parts

P-00273

List of Change Log to keep track of any audit history.

Details

Notes and AttachmentsDeployed In MaintenanceOld Maint. HistoryChange Log

Date	Change	From	To	By
12/11/2011 12:38 PM	created			Behmen Sanjana

Page | 44

3.3 BARCODE / EQUIPMENT INVENTORY

Define and identify multiple equipments for a specific location. Each Asset is tagged with a unique BARCODE and SUB ID that is useful for inventory management. If a property has multiple HVAC equipment (say 40 HVAC equipments) then each of this equipment will be considered as a separate asset. This separation will help identify issues related to individual equipment. Using this method, you can isolate the type of equipment across all location, in case, if there is a manufacture defect identified. It is also useful to audit/review all the past Maintenance work performed for specific Equipment.

Create New or Edit Existing BARCODE (Asset Inventory):

Select the menu option “BARCODE/EQUIPMENT INVENTORY” from the “TrackMeMaintenanceSetup” TAB.

- **“New”**: Select the button “New BARCODE/EQUIPMENT INVENTORY” from the BARCODE List Screen.
- **“Edit”**: Select “Edit” next to the existing Barcode entry under the “Action” column in the BARCODE List Screen.
- **“View”**: Select the specific entry listed under the “Name” column.

TrackMe MAINTENANCE - SETUP

BARCODE (Inventory) Management

CREATE and MODIFY information related to BARCODE that is defined for each EQUIPMENT for a specific Location. BARCODE is a unique identifier of an Equipment that is installed and located at a specific Location.

Barcode/Equipment Inventory

Action	Name	Barcode/Inventory ID	Additional Inventory ID	Equipment Description	Location Description	Expiration Date
Edit	MB-0000383	11123456789	1N-001	Elevator 7500n	Chicago, IL 61001, 300	
Edit	MB-0000384	22221456789	1N-002	Elevator 7500n	Chicago, IL 61001, 300	
Edit	MB-0000385	99921456789	1D-001	Elevator 7500n	Dallas, TX 75234, 100	
Edit	MB-0000481	1113678943210	Dash-001	Elevator 7500n	Dallas, TX 75234, 100	
Edit	MB-0000489	1113678943210	Dash-002	Elevator 7500n	Dallas, TX 75234, 100	
Edit	MB-0000528	2256123456789	WH-001	Steel Rein Tempn	Dallas, TX 75234, 100	
Edit	MB-0000529	2256123456789	WH-002	Steel Rein Tempn	Dallas, TX 75234, 100	
Edit	MB-0000529	2256123456789	WH-003	Steel Rein Tempn	Dallas, TX 75234, 100	

Add new BARCODE/EQUIPMENT INVENTORY record for a specific Location and Equipment. This record uniquely identifies your equipment installed or deployed at a specific location. Each physical Equipment Inventory will have a unique identifier in the form of BARCODE and SUB ID.

Barcode Edit

Barcode and SUB ID are attributes for this RECORD. Used for replacing the BARCODE ID.

Barcode Information

Name: MB-0000383

Barcode/Inventory ID: 11123456789

Additional Inventory ID (Sub ID): 1N-001

Location Information

Deployed Location: 1-0002

Address: 300 South Lakeview Drive, Chicago, IL 61001

Machine Information

Equipment ID: 1N-0001

Machine Description: Elevator 7500n

New Barcode/Equipment Inventory

Barcode/Equipment Inventory Information

Barcode/Inventory ID: [Field]

Additional Inventory ID (Sub ID): [Field]

Deployed Location Information

Select Location using only one of options below:

OPTION-1: [Field]

OPTION-2: [Field]

Equipment Information

Equipment ID: [Field]

Barcode/Equipment Inventory Detail

Barcode/Equipment Inventory Detail view of the selected BARCODE/EQUIPMENT Inventory Record.

Barcode/Equipment Inventory Detail

Name: MB-0000383

Barcode/Inventory ID: 11123456789

Additional Inventory ID (Sub ID): 1N-001

Location Information

Deployed Location: 1-0002

Location Name: Place Tower

Address: 300 South Lakeview Drive, Chicago, IL 61001

Equipment Information

Equipment ID: 1N-0001

Equipment Description: Elevator 7500n

List of Scheduled Maintenance

Maintenance ID	Maintenance Description	Last Date Completion Date	Last Date (Start Date)	Expiration Date
MAI-0001	Check and Inspect Elevator	12/22/12 12:00 PM	12/22/12 12:00 PM	
MAI-0002	Inspect Elevator - Chicago	12/22/12 12:00 PM	12/22/12 12:00 PM	
MAI-0003	Inspect - General Maintenance	12/22/12 12:00 PM	12/22/12 12:00 PM	

Note: View of the BARCODE is explained above. From the BARCODE you can create a new Maintenance Record from the Section “Schedule Maintenance” - “Create New Maintenance” button.

3.4 PREVENTIVE MAINTENANCE

Define and manage schedule maintenance task on Equipment utilizing specific Part or activity for each specific location. TrackMe Cases will be created based on the schedule defined. The application uses the Maintenance records to forecast the amount of expected Cases in near future.

There are three parts to this Process:

1. Create the Maintenance Scheduling Record for a Specific Location and Equipment information..
2. Assign the Equipment from the inventory to this Maintenance Scheduling Record.
3. Activate the BATCH JOB to monitor the Maintenance Record and Create the TrackMe-Case at the Scheduled time.

3.4.1 Maintenance Scheduler Details:

Select the menu option “PREVENTIVE MAINTENANCE” from the “TrackMeMaintenanceSetup” TAB.

- **“New”**: Select the button “New PREVENTIVE MAINTENANCE” from the MAINTENANCE List Screen.
- **“Edit”**: Select “Edit” next to the existing Maintenance ID under the “Action” column in the MAINTENANCE List Screen.
- **“View”**: Select the specific entry listed under the “MACHINE MAINTENANCE ID” column.

The screenshot displays the TrackMeCase software interface, specifically the Maintenance Record Management section. The interface is divided into several panels:

- Top Panel:** Contains navigation links: TrackMeCase, Mobile Search, Dashboard, TrackMe Setup, TrackMeCase Version Setup, TrackMeCase Users, TrackMe Case Page, and a back arrow.
- Left Sidebar:**
 - Maintenance Record Management:** The active section, containing a sub-link for **PREVENTIVE MAINTENANCE**.
- Main Content Area:**
 - Machine Maintenance C&E:** A form for editing the maintenance schedule for machine MM-0359. It includes fields for:
 - Equipment ID:** MM-0359
 - Location ID:** L-0001
 - Equipment Description:** Elevator 7500s
 - Parts Information:** Test Emergency Protocol
 - New Equipment Maintenance:** A form for creating a new maintenance record. It includes fields for:
 - Equipment ID:** MM-0359
 - Location ID:** L-0001
 - Equipment Description:** Elevator 7500s
 - Parts Information:** Test Emergency Protocol
- Bottom Panel:** A table listing scheduled maintenance records for machine MM-0359. The table has columns: Action, Date, Description, Location ID, Location Description, Equipment ID, Equipment Description, and Scheduled Date. The records show scheduled maintenance for the Elevator 7500s at the Chicago IL 01001 location.

3.4.2 Add Equipments to Maintenance Schedule

Add Equipments from the Inventory that is matching the Location and the Equipment type of the Maintenance Scheduler Record. This will ensure that the Maintenance is performed for the same type of equipments deployed at a specific location.

TrackMeCasesTrackMe SearchDashboardsTrackMeSetupTrackMeMaintenanceSetupTrackMeFinancialsTrackMe Site Page

TrackMe MAINTENANCE - SETUP

Maintenance Record Management

PREVENTIVE MAINTENANCE

CREATE and MODIFY information related to the Maintenance records used for creating the Case. Each Maintenance Record is made up of: Equipment, Parts or Activity, BARCODE for a specific property Location.

AllEditDeleteCreate New View

New MaintenanceChange Owner

A B C D E F G H I J K L M N O P Q

Action	Machine Maintenance ID	Active/Inactive Indicator	Description	Maintenance Days	Location Description	Equipment Description	Last case creation Date	Last Case Close Date	T
☐ Edit Del	MM-0281	✓	Clean and Inspect Elevator	30	Chicago, IL 61001,...	Elevator 7500x	1/24/2012 12:00 PM	1/24/2012 12:39 PM	1
☐ Edit Del	MM-0357	✓	Elevator - General Maintenance	30	Chicago, IL 61001,...	Elevator 7500x	1/24/2012 12:00 PM	12/19/2011 12:03...	1
☐ Edit Del	MM-0358	✓	Inspect Elevator	30	Dallas, TX, 75234, 1...	Elevator 7500x	1/24/2012 12:00 PM	12/19/2011 12:02...	1
☐ Edit Del	MM-0359	✓	Inspect Elevator - Chicago	30	Chicago, IL 61001,...	Elevator 7500x	1/24/2012 12:00 PM	2/7/2012 8:00 PM	1

Maintenance MM-0359

Display the details of the MAINTENANCE RECORD. An Equipment can only be assigned to the MAINTENANCE from the Detail Record.

Customize Page | Printable View | Help for this Page

DetailsNotes and AttachmentsMaintenance CasesChange Log

Maintenance Detail

EditCloneBack to Previous PageGo To List

Information

Machine Maintenance IDMM-0359

DescriptionInspect Elevator - Chicago

Maintenance StatusACTIVE

Active/Inactive Indicator✓

A SAP Create Case

MessageMaintenance Record is Active.

Maintenance Days30

Estimated Man Hours per Equipment1.00

Total Man hours required1.00

OwnerBehmen SanjanaChange

Last case creation Date1/24/2012 12:00 PM

Last Case Close Date2/7/2012 8:00 PM

Last Case Closed IDQ-05472

Last Case Open2Closed Days49

Next Scheduled Maintenance2/23/2012 12:00 PM

Month2

Location Information

Location IDL-0692

Location NamePlaza Tower

Address300 South Lake/View Drive

CityChicago

StateIL

Zip Code61001

Location Exp Date

Equipment and Parts/activity Information

Equipment IDM-0385

Equipment DescriptionElevator 7500x

Total Equipment Assigned1

Total Active Equipment1

Parts/Activity IDP-00273

Part/Activity DescriptionTest Emergency Protocol

System Information

Created ByBehmen Sanjana12/20/2011 12:01 PM

Last Modified ByBehmen Sanjana2/7/2012 8:00 PM

Assign Equipment for Maintenance

New Assign Equipment for Maintenance

Action	Assign Equip ID	Barcode_ID	Actual Barcode	SUB ID	Equipment ID	Equipment Description	Location ID	Location Description	Created Date	Expiration_Date
☐ Edit Del	MD-000095	MB-0000383	11123456789	1N-001	M-0385	Elevator 7500x	L-0692	Chicago, IL 61001, 300 South Lake/View Drive,	12/20/2011	

Edit Assign Equipment

Edit the ASSIGNED EQUIPMENT record for this MAINTENANCE.

SaveBackCancel

Information

Required Information

Maintenance_IDMM-0359

Barcode22223456789

SaveBackCancel

New Assign Equipment

Add new Equipment Barcode from the Inventory.

SaveBackCancel

Information

Required Information

Maintenance_IDMM-0359

Barcode22223456789

Barcode listed here is based on LOCATION and EQUIPMENT information present in the Maintenance Record.

SaveBackCancel

Assign Equipment for Maintenance

DISPLAY the Details of the ASSIGNED EQUIPMENT record.

Customize Page | Printable View | Help for this Page

DetailsNotes and AttachmentsChange Log

Assign Equipment for Maintenance Detail

EditDeleteCloneBack to Maintenance

Assign Equip IDMD-000095

Barcode_IDMB-0000383

Actual Barcode11123456789

SUB ID1N-001

Last Case Creation Date1/24/2012 12:00 PM

Last Case Close Date2/7/2012 8:00 PM

Expiration_Date

Expired_Record_Indicator1

Maintenance Information

Maintenance_IDMM-0359

Location IDL-0692

Equipment IDM-0385

Created ByBehmen Sanjana12/20/2011 12:01 PM

Maintenance DescriptionInspect Elevator - Chicago

Location DescriptionChicago, IL 61001, 300 South Lake/View Drive,

Equipment DescriptionElevator 7500x

Last Modified ByBehmen Sanjana12/20/2011 12:01 PM

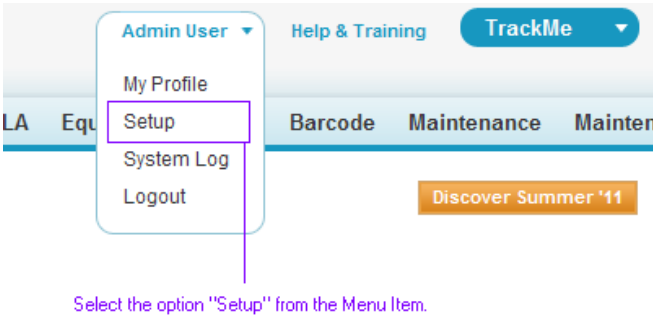
Page | 47

3.4.3 Automate MAINTENANCE Scheduler monitoring (Maintenance Batch Job Setup).

This item must be performed by the User that has System administrator privilege.

3.4.3.1 Check for the Batch Job that will trigger New Maintenance CASE on the Schedule Date.

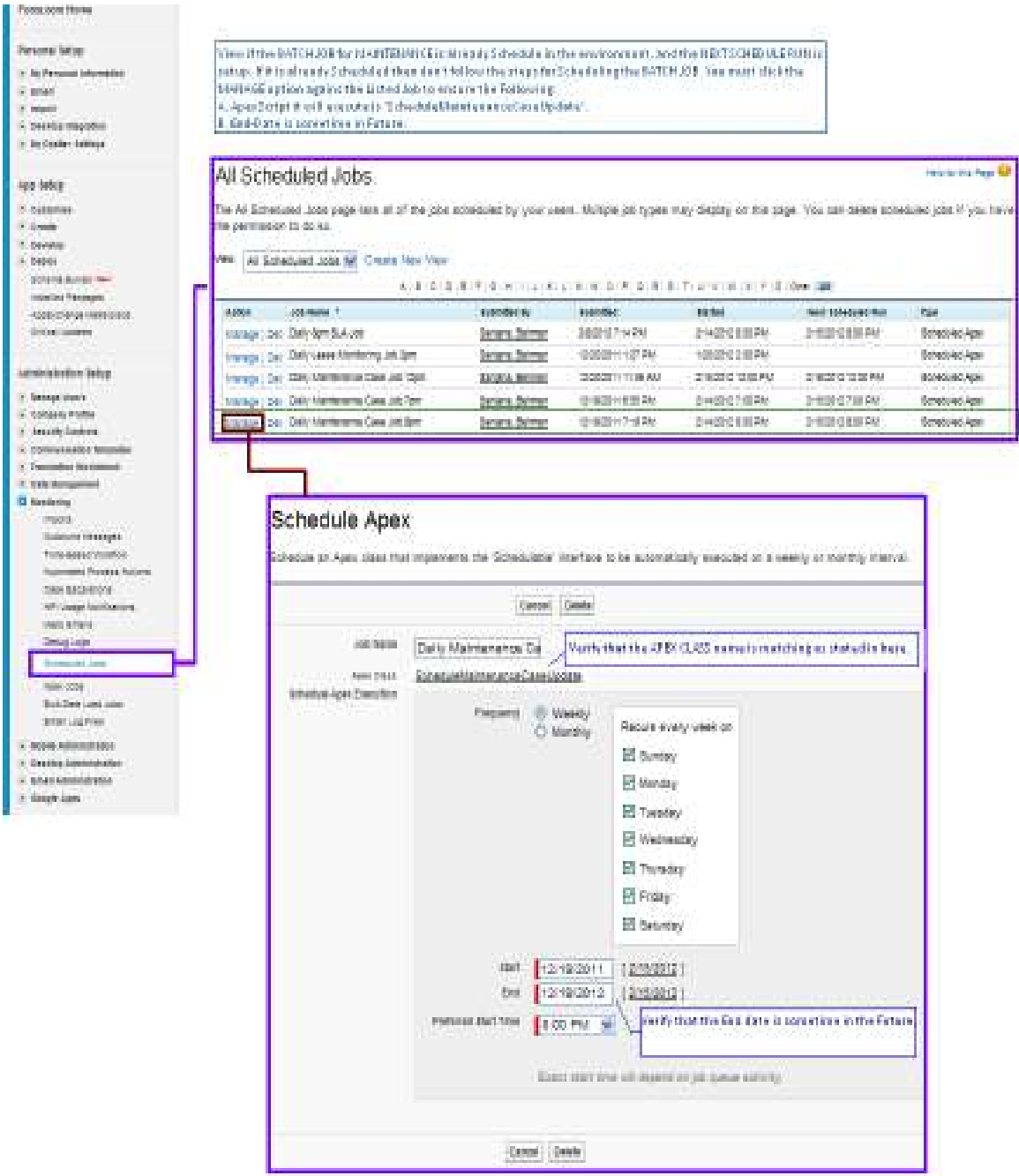
Step 1: Select “Setup from the top Menu item.



Select the option "Setup" from the Menu Item.

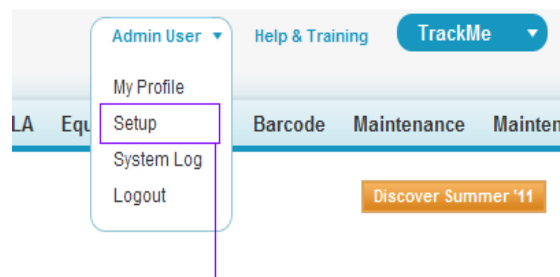
Step 2: From the Left hand menu, select the option “Monitoring” from the Administration Setup.

Step 3: Select the option “Schedule job” from the drop down menu under “Monitoring”. If a job is present in your environment, and it is active to run on a daily basis then you don’t have to perform the steps to create a new batch job.



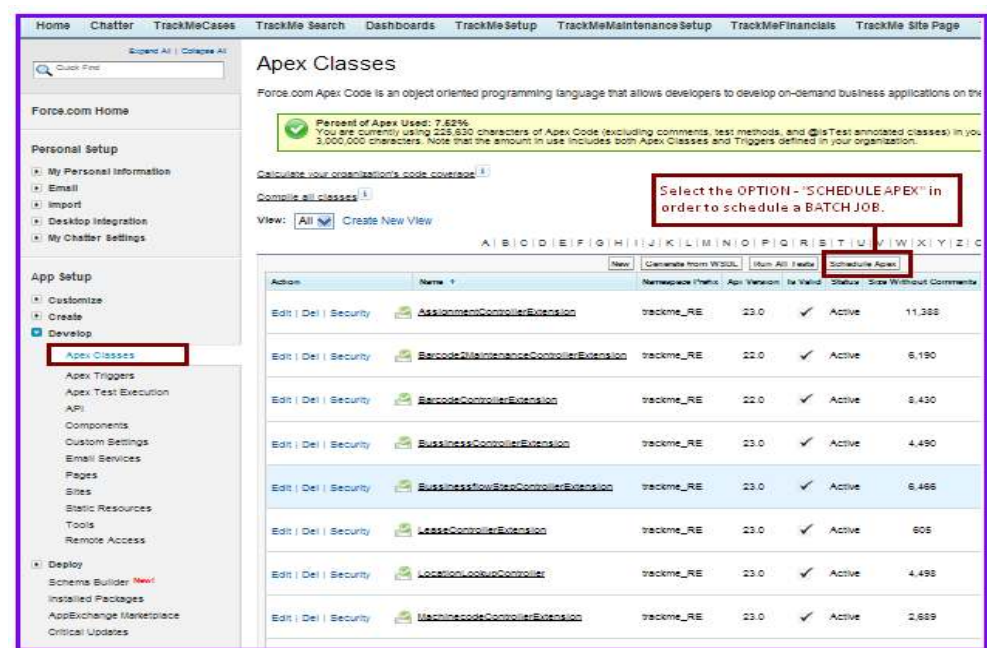
3.4.3.2 *Schedule a New Batch Job for Creating TrackMe Maintenance Cases at the Scheduled time*

Step 1: Select “Setup” from the top Menu item.

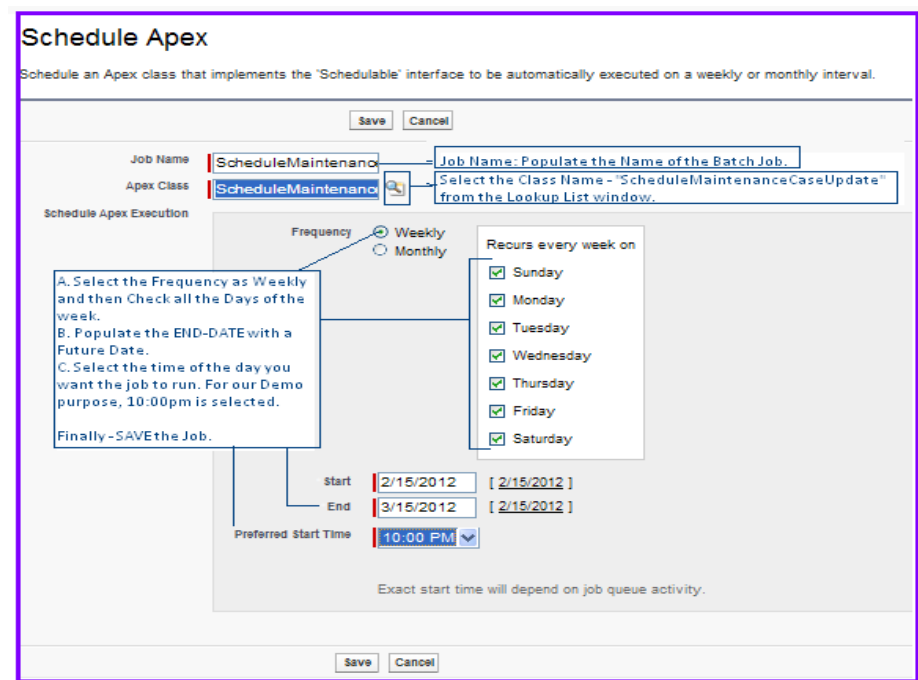


Step 2: Select the “APEX Class” option from the side Menu item under “Develop”.

Step 3: Select the button “Schedule Apex” from the Apex Classes.



Step 4: Create the new batch Job to automate the creation of the TrackMe Cases for the Scheduled Maintenance Activity on the NEXT-SCHEDULE-DATE. This job will review the PREVENTIVE MAINTENANCE records that are in ACTIVE status. On the NEXT SCHEDULE DATE, the job will trigger a creation of a new TrackMe Case for this PREVENTIVE MAINTENANCE record.



3.5 MAINTENANCE HISTORY

Repository that stores information related to MAINTENANCE cases that are now in CLOSED status. It provides an easy access to the Maintenance related CASES in order to perform any audits.

View MAINTENANCE HISTORY:

Select the menu option “MAINTENANCE HISTORY” from the “TrackMeMaintenanceSetup” TAB.

- **“New”**: Entries in this objects are generated automatically when a Maintenance Case (CASE CATEGORY OR REQUEST TYPE = “Maintenance”) is CLOSED.
- **“Edit”**: Edit of this table entry is not recommended because it will result in inaccurate data.
- **“View”**: Select the specific entry listed under the “MACHINE MAINTENANCE ID” column.

All

Edit

Delete

Create New View

Entries in this Object is created automatically when a Maintenance TrackMe Case is CLOSED. It keeps historical information on the Cases related to Maintenance in one place.

New MaintenanceHistory

Change Owner

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Maintenance_History_ID	Location ID	Location Description	Order	Machine Master	Machine Description	Parts ID
Edit Del	MH-0015	L-0112	Murphy,TX,75094,833 ...	O-00631	M-0067	GE Water Cooler 2x	P-00052

CAUTION: Please do not use the New Maintenance History button or the EDIT and DEL button for this Object.

MaintenanceHistory

MH-0015

Details

Notes and Attachments

Change Log

MaintenanceHistory Detail

Edit

Delete

Back to Previous Page

Maintenance_History_ID

MH-0015

Owner

Behmen Sanjana

Change

Location ID

L-0112

Location Description

Murphy,TX,75094,833 Morningside Trl,

Order

O-00631

Machine Master

M-0067

Machine Description

GE Water Cooler 2x

Parts ID

P-00052

Parts Description

3M Filter

Activity

Case Closed

Reason

Filter change complete.

Last case create Date

8/11/2011 3:10 PM

Created By

Behmen Sanjana, 8/11/2011 3:12 PM

Last Modified By

Behmen Sanjana, 8/11/2011 3:12 PM

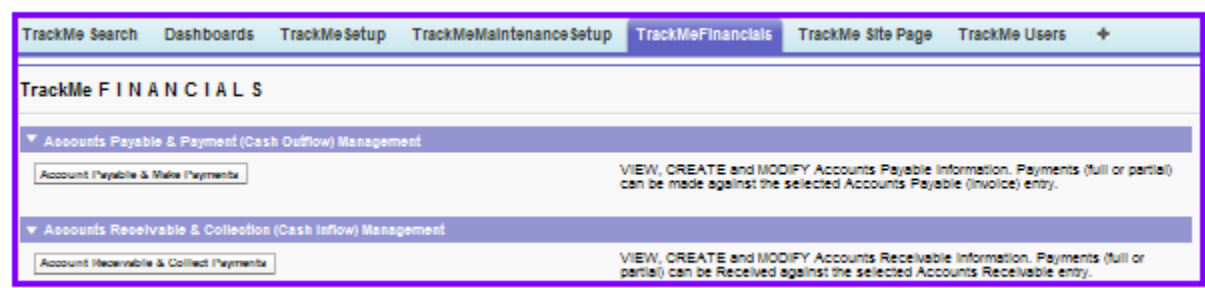
Edit

Delete

Back to Previous Page

4 TrackMe Financials

Provide the ACCOUNTS RECEIVABLE AND ACCOUNTS PAYABLE capability to track Income and Expense along with its Payments-received and Payments-Made functionality. Below screen describes the TrackMe Financials functionality:

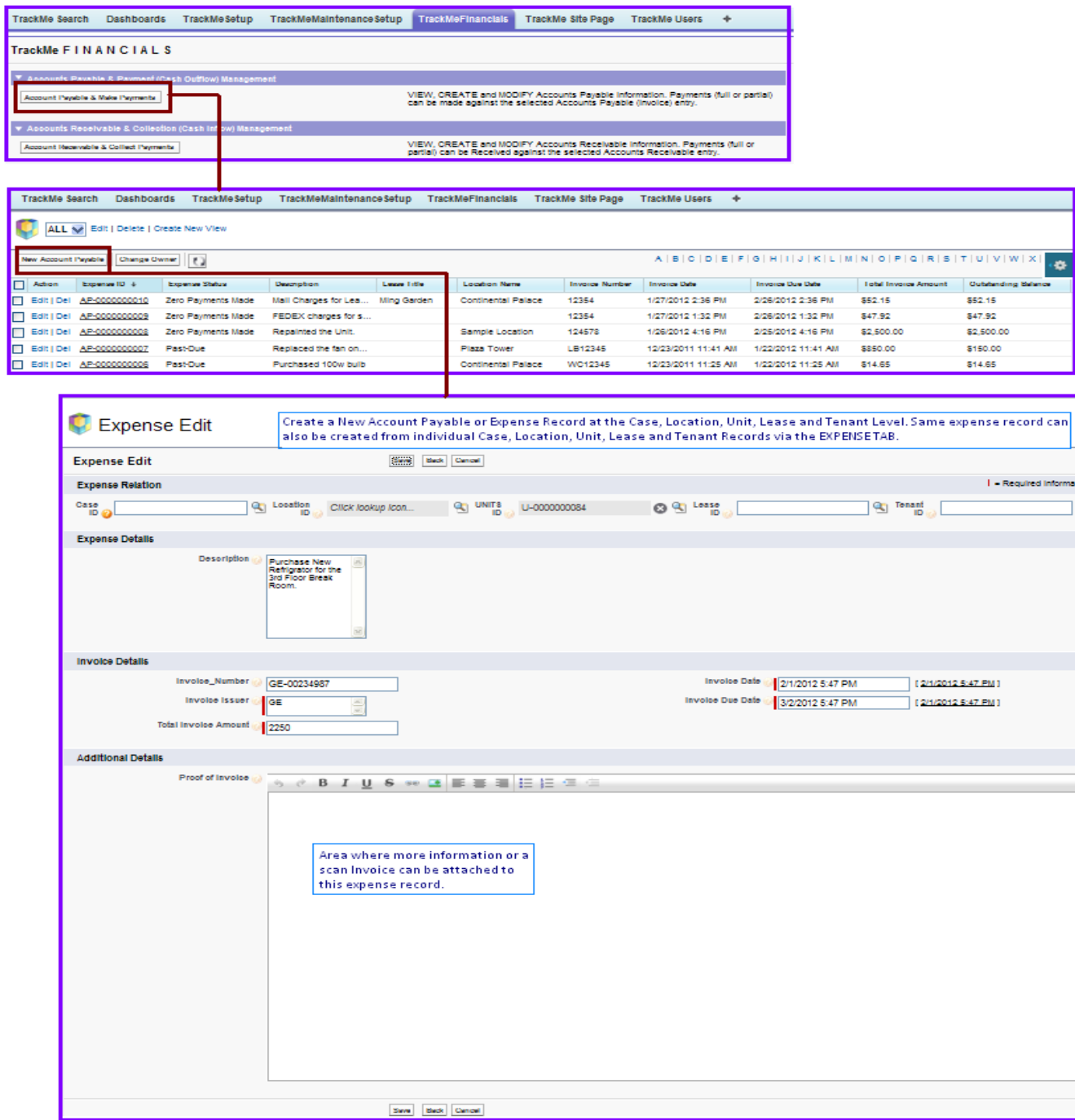


4.1 ACCOUNTS PAYABLE & MAKE PAYMENTS

4.1.1 Create New or Edit Existing ACCOUNTS PAYABLE:

Select the menu option “Account Payable & Make Payments” from the “TrackMeFinancials” TAB.

- “New”: Select the button “New Accounts Payable” from the Account Payable List Screen.



- **“Edit”**: Select “Edit” next to the existing Account Payable entry under the “Action” column on the ACCOUNT PAYABLE List Screen.

TrackMe Search

Dashboards

TrackMe Setup

TrackMe Maintenance Setup

TrackMe Financials

TrackMe Site Page

TrackMe Users

TrackMe Financials

Accounts Payable & Payment (Cash Outflow) Management

Account Payable & Make Payments

VIEW, CREATE and MODIFY Accounts Payable Information. Payments (full or partial) can be made against the selected Accounts Payable (Invoice) entry.

Accounts Receivable & Collection (Cash Inflow) Management

Account Receivable & Collect Payments

VIEW, CREATE and MODIFY Accounts Receivable Information. Payments (full or partial) can be Received against the selected Accounts Receivable entry.

TrackMe Search

Dashboards

TrackMe Setup

TrackMe Maintenance Setup

TrackMe Financials

TrackMe Site Page

TrackMe Users

ALL

Edit | Delete | Create New View

New Account Payable

Change Owner

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

ALL

☐	Action	Expense ID	Expense Status	Description	Lease Title	Location Name	Invoice Number	Invoice Date	Invoice Due Date	Total Invoice Amount	Outstanding
☐	Edit Del	AP-0000000011	Zero Payments Made	Purchase New Refrig...		Plaza place	GE-00234987	2/1/2012 5:47 PM	3/2/2012 5:47 PM	\$2,250.00	\$2,250.00
☐	Edit Del	AP-0000000010	Zero Payments Made	Mail Charges for Lea...	Ming Garden	Continental Palace	12354	1/27/2012 2:36 PM	2/26/2012 2:36 PM	\$52.15	\$52.15
☐	Edit Del	AP-0000000009	Zero Payments Made	FEDEX charges for s...			12354	1/27/2012 1:32 PM	2/26/2012 1:32 PM	\$47.92	\$47.92
☐	Edit Del	AP-0000000008	Zero Payments Made	Repainted the Unit.		Sample Location	124578	1/26/2012 4:16 PM	2/25/2012 4:16 PM	\$2,500.00	\$2,500.00
☐	Edit Del	AP-0000000007	Past-Due	Replaced the fan on...		Plaza Tower	LB12345	12/23/2011 11:41 AM	1/22/2012 11:41 AM	\$850.00	\$150.00
☐	Edit Del	AP-0000000006	Past-Due	Purchased 100w bulb		Continental Palace	WD12345	12/23/2011 11:25 AM	1/22/2012 11:25 AM	\$14.65	\$14.65

Expense Edit

AP-0000000011

Save | Back | Cancel

Expense Relation

Location ID

L-0952

UNIT ID

U-0000000084

Lease ID

Tenant ID

Case ID

Expense Details

Expense ID

AP-0000000011

Description

Purchase New Refrigerator for the 3rd Floor Break Room.

Invoice Details

Invoice Number

GE-00234987

Invoice Date

2/1/2012 5:47 PM

Invoice Issuer

GE

Invoice Due Date

3/2/2012 5:47 PM

Total Invoice Amount

2,250.00

Additional Details

Upload of Invoice

TrackMe FMC, LLC

123 Main Street, Dallas, TX 75204

Phone 972.123.4567 Fax 972.785.4321

trackme@trackfmc.com

TO: Mr. John L. MacIntosh

Search, Inc.

1325 Westberry Ln.

Allen, TX 75002

972.123.4567

Customer ID 00-123456

DATE: FEBRUARY 1, 2012

INVOICE # GE-00234987

SALESPERSON

Tony

JOB

N/A

SHIPPING METHOD

UPS

SHIPPING TERMS

N/A

DELIVERY DATE

02-01-2012

PAYMENT TERMS

Due on receipt

DUE DATE

02-01-2012

QTY

1

ITEM #

GE-1728

DESCRIPTION

GE Refrigerator - 2 door Side-by-Side - Dis.

UNIT PRICE

2,250.00

DISCOUNT

0.00

LINE TOTAL

2,250.00

- **“View”**: Select the specific entry listed under the “EXPENSE ID” column.

TrackMe Search Dashboards TrackMe Setup TrackMe Maintenance Setup **TrackMe Financials** TrackMe Site Page TrackMe Users +

TrackMe FINANCIALS

Accounts Payable & Payment (Cash Outflow) Management

Account Payable & Make Payments

VIEW, CREATE and MODIFY Accounts Payable Information. Payments (full or partial) can be made against the selected Accounts Payable (Invoice) entry.

Accounts Receivable & Collection (Cash Inflow) Management

Account Receivable & Collect Payments

VIEW, CREATE and MODIFY Accounts Receivable Information. Payments (full or partial) can be Received against the selected Accounts Receivable entry.

TrackMe Search Dashboards TrackMe Setup TrackMe Maintenance Setup TrackMe Financials TrackMe Site Page TrackMe Users +										
 ALL Edit Delete Create New View										
New Account / Payable Change Owner 										
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other ALL										
Action	Account Number	Expense Status	Description	Asset Title	Location Name	Invoice Number	Invoice Date	Invoice Due Date	Total Invoice Amount	Outstanding
Edit Delete	AP-0000000011	Zero Payments Made	Purchase New Refrig...		Plaza place	0E-00234987	2/1/2012 5:47 PM	3/2/2012 5:47 PM	\$2,250.00	\$2,250.00
Edit Delete	AP-0000000010	Zero Payments Made	Mail Charges for Lea...	Ming Garden	Continental Palace	12354	1/27/2012 2:36 PM	2/6/2012 2:36 PM	\$52.15	\$52.15
Edit Delete	AP-0000000008	Zero Payments Made	FEDEx charges for s...			12354	1/27/2012 1:32 PM	2/6/2012 1:32 PM	\$47.92	\$47.92
Edit Delete	AP-0000000006	Zero Payments Made	Repainted the Unit.		Sample Location	124578	1/26/2012 4:16 PM	2/25/2012 4:16 PM	\$2,500.00	\$2,500.00
Edit Delete	AP-0000000007	Past-Due	Replaced the fan on...		Plaza Tower	LB12345	12/23/2011 11:41 AM	1/22/2012 11:41 AM	\$350.00	\$150.00
Edit Delete	AP-0000000005	Past-Due	Purchased 100w bulb		Continental Palace	WC12345	12/23/2011 11:25 AM	1/22/2012 11:25 AM	\$14.65	\$14.65

Account Payable

AP-0000000011

Customize Page | Printable View | Help for this Page

Invoice

Notes and Attachments

Change Log

Account Payable Details

Company ID

AP-0000000011

Description

Purchase New Refrigerator for the 3rd Floor Break Room

Cancel

Close

Print/View

Company ID

AP-0000

Location ID

LC0000

Location Name

Plaza Place

Location Address

100 Main Street Dallas, TX 75210

UNITS ID

AP-0000000000

Unit Name

Primary 01

LAMMA ID

LAMMA Title

LAMMA Description

Tenant ID

Tenant Full Name

Invoice Details

Invoice Number

00-00000000

Invoice Maker

00

Total Invoice Amount

\$0.000.00

Proof of Invoice

Invoice Date

01/00/12 0:00 PM

Invoice Month

01/00

Invoice Due Date

02/00/12 0:00 PM

Invoice Due Month

01/00

TrackMe PNC, LLC

We don't overcharge!

For more details, please, call 1-800-456-7890

Please call 1-800-456-7890. Fax: 972-123-4567

trackme@trackme.com

TO: Mr. John J. Henderson

Default Inc.

100 Main Street, Suite 100

Waco, TX 76798

972-123-4567

Customer ID: 00-123456

FROM: Mr. John J. Henderson

Default Inc.

Plaza Place, 100 Main Street

Dallas, TX 75210

972-123-4567

Customer ID: 00-123456

INVOICE NUMBER	JOB	INVOICE REFERENCE	INVOICE TERM	INVOICE DATE	INVOICE TOTAL	DUE DATE
TrackMe	N/A	001	N/A	01/01/2012	Due on receipt	02/01/2012

QTY	UNIT	DESCRIPTION	UNIT PRICE	DISCOUNT	LINE TOTAL
1	00-100	00 Refrigerator - 1 door Energy Star, 30cu	1,300.00	0.00	1,300.00
			TOTAL DISCOUNT		1,300.00
			TOTAL		1,300.00
			GROSS TOTAL		00.00
			TOTAL		1,300.00

Please email invoice to TrackMe PNC, LLC.

THANK YOU FOR YOUR BUSINESS!

Total Aging Days

0

Aging Range

0 to 90

Payment Summary

Total Payments Received

0

Total Amount Paid

\$0.00

Total Write-off Amount

\$0.00

Outstanding Balance

\$0.000.00

Company Status

Zero Payments Made

Cancel

Close

Print/View

Owner

Sehman Sarjana [Change]

Created By

Sehman Sarjana, 01/00/12 0:00 PM

Last Modified By

Sehman Sarjana, 01/00/12 0:00 PM

System Information

Payment-Made

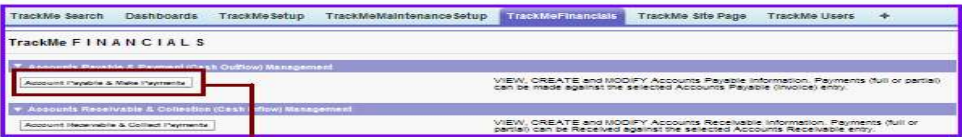
View Payment-Made

No records to display

4.1.2 Make PAYMENTS to the ACCOUNT PAYABLE item:

Select the menu option “ACCOUNT PAYABLE & MAKE PAYMENTS” from the “TrackMeFinancials” TAB. Select the ACCOUNT PAYABLE / EXPENSE ENTRY from the list Screen. From the ACCOUNTS PAYABLE DETAIL screen, payments can be made from the PAYMENT-MADE Section.

- “New”: Select the button “New Payment Made” from the PAYMENT-MADE Listing Section.
- “Edit”: Select “Edit” next to the existing PAYMENT-ID under the “Action” column in the PAYMENT-MADE List Screen.
- “View”: Select the specific entry listed under the “PAYMENT ID” column.



This screenshot shows the 'New Account Payable' screen with a table of expense entries. The table has columns for Action, Expense ID, Expense Status, Description, Lease Title, Location Name, Invoice Number, Invoice Date, Invoice Due Date, Total Invoice Amount, and Outstanding. The first entry is highlighted with a red box.

Action	Expense ID	Expense Status	Description	Lease Title	Location Name	Invoice Number	Invoice Date	Invoice Due Date	Total Invoice Amount	Outstanding
☐ Edit ☐ Del	AE-00000000011	Zero Payments Made	Purchase New Refrig...		Place place	GE-00234987	2/1/2012 8:47 PM	3/3/2012 8:47 PM	\$2,250.00	\$2,250.00
☐ Edit ☐ Del	AE-00000000008	Zero Payments Made	Main Charges for Le...	Ming Garden	Continental Palace	12354	1/27/2012 2:38 PM	2/26/2012 2:38 PM	\$52.15	\$52.15
☐ Edit ☐ Del	AE-00000000008	Zero Payments Made	FEDEX charges for s...			12354	1/27/2012 1:32 PM	2/26/2012 1:32 PM	\$47.95	\$47.95
☐ Edit ☐ Del	AE-00000000003	Zero Payments Made	Repaired the Unit...		Sample Location	124578	1/26/2012 4:16 PM	2/25/2012 4:16 PM	\$2,500.00	\$2,500.00
☐ Edit ☐ Del	AE-00000000007	Past-Due	Replaced the fan on...		Plaza Tower	LB12345	12/23/2011 11:41 AM	1/22/2012 11:41 AM	\$850.00	\$150.00
☐ Edit ☐ Del	AE-00000000006	Past-Due	Purchased 100w bulb		Continental Palace	WV12345	12/23/2011 11:25 AM	1/22/2012 11:25 AM	\$14.65	\$14.65

This screenshot shows the 'Account Payable Detail' screen for AP-00000000011. It includes sections for Invoice Details, Invoice, Payment Summary, System Information, and Payment-Made. The 'Payment-Made' section at the bottom shows a table with one entry: Transaction ID 2356, Amount Paid \$1,050.00, Payment Date 2/1/2012 6:55 PM, Payment Mode CHECK, and Payment Status ACCEPTED. A red box highlights the 'New Payment Made' button.

Invoice Details:
 Invoice Number: GE-00234987
 Invoice Number: GE
 Total Invoice Amount: \$2,250.00
 Point of Invoice:
 Invoice Date: 2/1/2012 8:47 PM
 Invoice Due Date: 3/3/2012 8:47 PM
 Invoice Due Month: 2012/3

Payment Summary:
 Total Payment Records: 1
 Total Amount Paid: \$1,050.00
 Total Withhold Amount: \$0.00
 Outstanding Balance: \$1,200.00

Payment-Made:

Action	Payment ID	Transaction ID	To	Amount Paid	Payment Date	Payment Mode	Payment Status
☐ Edit ☐ Del	APD-00000000001	2356	TrackMe FMC LLC	\$1,050.00	2/1/2012 6:55 PM	CHECK	ACCEPTED

This screenshot shows the 'Payment Edit' screen for APD-00000000001. It includes sections for Payment Made Details and Additional Details. The 'Payment Made Details' section shows fields for Payment ID, Accounts Payable ID, Payment Type (REGULAR), To (TrackMe FMC LLC), Transaction ID (33333), Payment Mode (CHECK), Payment Date (2/1/2012 6:55 PM), Amount Paid (1,050.00), Payment Status (ACCEPTED), and Description/Memo (Paid Half for the Invoice).

Payment Made Details:
 Payment ID: APD-00000000001
 Accounts Payable ID: AE-00000000011
 Payment Type: REGULAR
 To: TrackMe FMC LLC
 Transaction ID: 33333
 Payment Mode: CHECK
 Payment Date: 2/1/2012 6:55 PM
 Amount Paid: 1,050.00
 Payment Status: ACCEPTED
 Description/Memo: Paid Half for the Invoice

This screenshot shows the 'Payment Edit' screen for APD-00000000001. It includes sections for Payment Made Details and Additional Details. The 'Payment Made Details' section shows fields for Payment ID, Accounts Payable ID, Payment Type (REGULAR), To (TrackMe FMC LLC), Transaction ID (2356), Payment Mode (CHECK), Payment Date (2/1/2012 6:55 PM), Amount Paid (1050), Payment Status (ACCEPTED), and Description/Memo (Paid Half for the Invoice).

Payment Made Details:
 Payment ID: APD-00000000011
 Accounts Payable ID: AE-00000000011
 Payment Type: REGULAR
 To: TrackMe FMC LLC
 Transaction ID: 2356
 Payment Mode: CHECK
 Payment Date: 2/1/2012 6:55 PM
 Amount Paid: 1050
 Payment Status: ACCEPTED
 Description/Memo: Paid Half for the Invoice

This screenshot shows the 'Payment-Made Detail' screen for APD-00000000001. It includes sections for Payment Made Details and Additional Details. The 'Payment Made Details' section shows fields for Payment ID, Accounts Payable ID, To (TrackMe FMC LLC), Transaction ID (2356), Payment Date (2/1/2012 6:55 PM), Amount Paid (\$1,050.00), Payment Status (ACCEPTED), and Description/Memo (Paid Half for the Invoice). A red box highlights the 'Payment Status' field.

Payment Made Details:
 Payment ID: APD-00000000001
 Accounts Payable ID: AE-00000000011
 To: TrackMe FMC LLC
 Transaction ID: 2356
 Payment Date: 2/1/2012 6:55 PM
 Amount Paid: \$1,050.00
 Payment Status: ACCEPTED
 Description/Memo: Paid Half for the Invoice

4.2 ACCOUNTS RECEIVABLE & COLLECT PAYMENTS

4.1.1 Create New or Edit Existing ACCOUNTS RECEIVABLE:

Select the menu option “Account Receivable & Collect Payments” from the “TrackMeFinancials” TAB.

- **“New”**: Select the button “New Accounts Receivable” from the Account Receivable List Screen.
- **“Edit”**: Select “Edit” next to the existing Account Receivable entry under the “Action” column on the ACCOUNT RECEIVABLE List Screen.
- **“View”**: Select the specific entry listed under the “AR ID” column.

TrackMe Search Dashboards TrackMe Setup TrackMe Maintenance Setup **TrackMe Financials** TrackMe Site Page TrackMe Users +

TrackMe FINANCIALS

Accounts Payable & Payment (Cash Outflow) Management

Account Payable & Make Payments

VIEW, CREATE and MODIFY Accounts Payable Information. Payments (full or partial) can be made against the selected Accounts Payable (invoice) entry.

Accounts Receivable & Collection (Cash Inflow) Management

Account Receivable & Collect Payments

VIEW, CREATE and MODIFY Accounts Receivable Information. Payments (full or partial) can be Received against the selected Accounts Receivable entry.

ALL Edit | Delete | Create New View List of all the ACCOUNTS RECEIVABLE or INCOME RECORDS.

New Account Receivable Change Owner #

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Action	AR ID	Bill Date	Description	Lease ID	Lease Description	Location ID	Location Name	Payment Due Date	Tenant ID	Tenant Full Name	Unit ID	Unit Name
☐ Edit Del	AR-0000000024	12/11/2011 1:00 PM	Scheduled Billed ba... Basic Rent - 1200.00	LE-0000000004	Ming Garden Lease...	L-0881	Continental Palace	1/10/2012 1:00 PM			U-0000000007	CP-002
☐ Edit Del	AR-0000000025	2/2/2012 1:28 PM	Rent the Parking L...			L-0883	Sample Location	2/2/2012 1:28 PM			U-0000000085	Suite 100

Receivable Edit EDIT an existing INCOME or AR record.

Receivable Edit Save Back Cancel

Receivable Relation Required Information

Location ID L-0883 Unit ID U-0000000085 Lease ID Tenant ID

Income Details

AR_ID AR-0000000025 Description Rent the Parking lot for an evening event to Red Cross

Collection/Bill Details

Bill Date 2/2/2012 1:28 PM Total Bill Amount 1,500.00 Payment Due Date 2/2/2012 1:28 PM

Receivable Edit Create a New ACCOUNTS RECEIVABLE or INCOME record. Rent collection records are also part of ACCOUNTS RECEIVABLE.

Receivable Edit Save Back Cancel

Receivable Relation Required Information

Location ID Click lookup icon... Unit ID U-0000000085 Lease ID Tenant ID

Income Details

AR_ID Description Event to Red Cross

Collection/Bill Details

Bill Date 2/2/2012 1:28 PM Total Bill Amount 1500 Payment Due Date 2/2/2012 1:28 PM

Account Receivable AR-0000000025 Detail view of the ACCOUNTS RECEIVABLE or INCOME record. Payments received is captured from the PAYMENT-RECEIVED SECTION in this Record.

Customize Page | Printable View | Help for this Page

Details Notes and Attachments Change Log

Account Receivable Detail Edit Clone Go to List

AR ID AR-0000000025 Owner Behmen Sanjana (Change)

Description Rent the Parking lot for an evening event to Red Cross

Location ID L-0883 Location Name Sample Location Location Address 100 Demo Lane, Dallas, TX, 75094 Unit ID U-0000000085 Unit Name Suite 100 Lease ID Lease Title Lease Description Tenant ID Tenant Full Name

Collection/Bill Details

Total Bill Amount \$1,500.00 Total Payment Received \$0.00 Total Write-off Amount \$0.00 Total Outstanding Balance \$1,500.00 Bill Date 2/2/2012 1:28 PM Bill Month 2012/2 Collection Status Past Due

Payment Statistics

Total Aging Days 0 Aging Range 0 to 30 Payment Due Date 2/2/2012 1:28 PM Payment due Month 2012/2 Date Last Payment Received

Created By Behmen Sanjana 2/2/2012 1:31 PM Last Modified By Behmen Sanjana 2/2/2012 1:31 PM

Payment-Received New Payment-Received

No records to display PAYMENTS received for this Income or AR Record is performed from this Section.

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4.1.2 Collect PAYMENTS to the ACCOUNT RECEIVABLE item:

Select the menu option “Account Receivable & Collect Payments” from the “TrackMeFinancials” TAB. Select the ACCOUNT RECEIVABLE / INCOME ENTRY from the list Screen. From the ACCOUNTS RECEIVABLE DETAIL screen, payments can be collected from the PAYMENT-RECEIVED Section.

- “New”: Select the button “New Payment Made” from the PAYMENT-RECEIVED Listing Section.
- “Edit”: Select “Edit” next to the existing AR-ID under the “Action” column in the PAYMENT-RECEIVED List Screen.
- “View”: Select the specific entry listed under the “AR ID” column.

TrackMe Search Dashboards TrackMeSetup TrackMeMaintenanceSetup **TrackMeFinancials** TrackMe Site Page TrackMe Users +

TrackMe FINANCIALS

Accounts Payable & Payment (Cash Outflow) Management

Account Payable & Make Payments

VIEW, CREATE and MODIFY Accounts Payable information. Payments (full or partial) can be made against the selected Accounts Payable (invoice) entry.

Accounts Receivable & Collection (Cash Inflow) Management

Account Receivable & Collect Payments

VIEW, CREATE and MODIFY Accounts Receivable information. Payments (full or partial) can be Received against the selected Accounts Receivable entry.

ALL Edit Delete Create New View

New Account Receivable Change Owner

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Action	AR ID *	Bill Date	Description	Lease ID	Lease Description	Location ID	Location Name	Payment Due Date	Tenant ID	Tenant Full Name	Unit ID	Unit Name
☐	Edit Del	AR-0000000025	12/11/2011 1:00 PM	Scheduled Billing for Basic Rent - 1200.00	LE-000000000024	Ming Garden Lease...	L-0281	Continental Palace	1/10/2012 1:00 PM		U-000000000002	OP-002
☐	Edit Del	AR-0000000025	2/2/2012 1:23 PM	Rent the Parking Lot...			L-0282	Sample Location	2/2/2012 1:23 PM		U-000000000025	Suite 100

Account Receivable

AR-0000000025

View the details about the ACCOUNT RECEIVABLE or INCOME record.

Customize Page | Printable View | Help for this Page

Details Notes and Attachments Change Log

Account Receivable Detail

AR ID AR-0000000025

Owner Behmen Sanjane (Change)

Description Rent the Parking lot for an evening event to Red Cross.

Location ID L-0282

Location Name Sample Location

Location Address 100 Demo Lane, Dallas, TX, 75094

Unit ID U-000000000025

Unit Name Suite 100

Lease ID

Lease Title

Lease Description

Tenant ID

Tenant Full Name

Collection/Bill Details

Total Bill Amount \$1,500.00

Total Payment Received \$0.00

Total Withhold Amount \$0.00

Total Outstanding Balance \$1,500.00

Before the Payment is received the OutstandingBs is \$1500.00.

Bill Date 2/2/2012 1:23 PM

Bill Month 2012/2

Collection Status Paid-Out

Payment Statistics

Total Aging Days 0

Aging Range 0 to 30

Payment Due Date 2/2/2012 1:23 PM

Payment due Month 2012/2

Date Last Payment Received

Created By Behmen Sanjane 2/2/2012 1:31 PM

Last Modified By Behmen Sanjane 2/2/2012 1:31 PM

Payment-Received

No records to display

New Payment-Received

Payment Received Edit

Create a New PAYMENT RECEIVED record for the ACCOUNT RECEIVABLE record.

Save Back Cancel

Payment Receive Details

I = Required information

Receivable ID AR-0000000025

Account Receivable ID AR-0000000025

Receivable Type REGULAR

From

Transaction ID

Receivable Mode MASTERCARD

Payment Receive Date 2/2/2012 2:09 PM

Amount Received

Receivable Status ACCEPTED

Description/Memo

Additional Details

Proof of Payment Received

Save Back Cancel

Receivable_Type = Regular or Write-Off. "REGULAR" means for all actual Payments received. "WRITE-OFF" means that there is no expectation that we will receive the stated Amount. This option can be used to give Discount at the time of Payments Received Or to adjust the AR Record as Paid.

Receivable Status - Accepted or VOID. To apply the payment to the AR record, Select ACCEPTED. To reject the Payment use "VOID".

Payment-Received

PAY-0000000000

Payment detail record after the Payment transaction is saved with appropriate payment information.

Details Notes and Attachments Change Log

Payment-Received Detail

Receivable ID PAY-0000000000

Account Receivable ID AR-0000000025

Receivable Type REGULAR

From Red Cross

Transaction ID RC-0987654

Receivable Mode WIRE-TRANSFER

Payment Receive Date 2/2/2012 2:09 PM

Amount Received \$1,500.00

Receivable Status ACCEPTED

Description/Memo Received Payment from RC

Additional Information

Proof of Payment Received

Save Delete Clone Back to All Collections

ALL Edit Delete Create New View

New Account Receivable Change Owner

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Action	AR ID *	Bill Date	Description	Lease ID	Lease Description	Location ID	Location Name	Payment Due Date	Tenant ID	Tenant Full Name	Unit ID	Unit Name
☐	Edit Del	AR-0000000025	12/11/2011 1:00 PM	Scheduled Billing for Basic Rent - 1200.00	LE-000000000024	Ming Garden Lease...	L-0281	Continental Palace	1/10/2012 1:00 PM		U-000000000002	OP-002
☐	Edit Del	AR-0000000025	2/2/2012 1:23 PM	Rent the Parking Lot...			L-0282	Sample Location	2/2/2012 1:23 PM		U-000000000025	Suite 100

Account Receivable

AR-0000000025

View the details about the ACCOUNT RECEIVABLE or INCOME record.

Customize Page | Printable View | Help for this Page

Details Notes and Attachments Change Log

Account Receivable Detail

AR ID AR-0000000025

Owner Behmen Sanjane (Change)

Description Rent the Parking lot for an evening event to Red Cross.

Location ID L-0282

Location Name Sample Location

Location Address 100 Demo Lane, Dallas, TX, 75094

Unit ID U-000000000025

Unit Name Suite 100

Lease ID

Lease Title

Lease Description

Tenant ID

Tenant Full Name

Collection/Bill Details

Total Bill Amount \$1,500.00

Total Payment Received \$1,500.00

Total Withhold Amount \$0.00

Total Outstanding Balance \$0.00

After Full Payment is received, the Outstanding Balance is now Zero.

Bill Date 2/2/2012 1:23 PM

Bill Month 2012/2

Collection Status Full Payment Received

Payment Statistics

Total Aging Days 0

Aging Range 0 to 30

Payment Due Date 2/2/2012 1:23 PM

Payment due Month 2012/2

Date Last Payment Received 2/2/2012 2:09 PM

Created By Behmen Sanjane 2/2/2012 1:31 PM

Last Modified By Behmen Sanjane 2/2/2012 2:11 PM

Payment-Received

New Payment-Received

Action	Receivable ID	From	Description/Memo	Amount Received	Payment Receive Date	Receivable Mode	Receivable Status	Transaction ID
Edit Del	PAY-0000000000	Red Cross	Received Payment from RC	\$1,500.00	2/2/2012 2:09 PM	WIRE-TRANSFER	ACCEPTED	RC-0987654

View of the ACCOUNT RECEIVABLE or INCOMERecord after the PAYMENT is received and recorded for this Transaction. PAYMENT-RECEIVED section will contain the Payment record. You can have multiple Payment records with various Amount for a single ACCOUNT RECEIVABLE Transaction. The Total of all the Payments should not exceed the AR or INCOMERecord total.

5 TrackMe SEARCH

Provides a unique capability to identify Equipments located at a specific location, including, its case history, Maintenance Schedule, Details of the Equipment, and, most importantly the multiple locations where this Equipment is deployed.

TrackMe Search:

A search can be performed using a BARCODE or by selecting the Location. Search results can be used to solve issues with selected equipment. The results also can be used to identify all the locations that have similar type of equipment deployed. Such information can be useful in case if a manufacturing defect is identified. Below screen describes the TrackMe search:

TrackMe Search

Dashboards

Location

Department

Request Type

SLA

Business Flow

Equipment

Parts

Barcode

Maintenance

Tenant

Track Me Search

Enter the Following Details

Required Information

Search Name/Barcode:

State:

City:

Address:

Barcode:

Subid:

Search

Either you can enter a BARCODE (even partial number is accepted) on the left or you can select the State, City, address on the right side of this search screen to retrieve the details about the Equipment.

Equipment Details

Barcode	Subid	Machine Description	Address
12345678901234	North-078	Carrier AC Unit	IL, Champaign, 1818 First Ave., 61800
12332148824882	3North-Sector4-South	Otis Elevator Gear Traction	IL, Champaign, 1818 First Ave., 61800

TrackMe Search

Dashboards

Location

Department

Request Type

SLA

Business Flow

Equipment

Parts

Barcode

Maintenance

Tenant

Machine Barcode

Information

Barcode: 12345678901234

Machine Master: M-0000

Subid: North-078

Machine Description: Carrier AC Unit

Created By: Pushban Rajaiyan, 5/27/2011 8:24 PM

Location Information

Location: L-0003

Address: 1818 First Ave.,

City: Champaign

State: IL

Zipcode: 61800

Machine Maintenances

Cases

Deployed Locations

Related Machine Details

Attachments

Notes

Name	Description	Active/Inactive Indicator	Maintenance days	Next Scheduled Maintenance	Machine Master	Machine Description	Parts Master	Part Description
MM-0000	Change Air Filter	✓	45	7/17/2011 4:33 PM	M-0000	Carrier AC Unit	P-00000	3M Filters

This TrackMe Search Screen shows the data from the various TABS that are as a result of the Search.

TrackMe SearchDashboardsLocationDepartmentRequest TypeSLABusiness FlowEquipmentPartsBarcodeMaintenanceTenant

Machine Barcode

Information

Barcode12345678901234Machine MasterM-0000

SubidNorth-078Machine DescriptionCarrier AC Unit

Created ByPushban Rajaiyan , 5/27/2011 6:24 PM

Location information

LocationL-0003

Address1818 First Ave ,

CityChampaign

StateIL

Zipcode61800

Machine MaintenancesCasesDeployed LocationsRelated Machine DetailsAttachmentsNotes

Name	Description	Active/Inactive Indicator	Maintenance days	Next Scheduled Maintenance	Machine Master	Machine Description	Parts Master	Part Description
MM-0000	Change Air Filter	✓	45	7/17/2011 4:33 PM	M-0000	Carrier AC Unit	P-00000	3M Filters

CASE TAB is selected for the above equipment. List of all the CASES are displayed that are related to this BARCODE.

Machine MaintenancesCasesDeployed LocationsRelated Machine DetailsAttachmentsNotes

Case Number	Description	Creation Date	Due Date	Close Date	Priority	Status	Department Assigned
O-00005	Change Air Filter for: EQUIPMENT = "Carrier AC Unit"	5/27/2011 6:25 PM		6/2/2011 4:31 PM		Closed	
O-00740	Change Air Filter for: EQUIPMENT = "Carrier AC Unit"	6/2/2011 4:32 PM		6/2/2011 4:33 PM		Closed	

Deployed Location is selected. List of all the Location where this equipment is deployed is displayed.

Machine MaintenancesCasesDeployed LocationsRelated Machine DetailsAttachmentsNotes

Barcode	Subid	Address	Expiration Date
12345678901234	North-078	IL, Champaign, 1818 First Ave., 61800	

Related Machine Details is selected. List all the details about this Equipment.

Machine MaintenancesCasesDeployed LocationsRelated Machine DetailsAttachmentsNotes

Machine Master	Attribute	Value
M-0000	Model	8700x Turbo 3.5 liter

Attachments is selected for this equipment. If there are any Blue prints or machine diagram then it can be made accessible via this method.

Machine MaintenancesCasesDeployed LocationsRelated Machine DetailsAttachmentsNotes

Name	Last Modified Date	Created Date
Cooling tower 3 pump system.jpg	07/18/2011, 5:49 PM	07/18/2011, 5:49 PM

NOTES is selected for this equipment. If there are any special notes that a technical must be made aware of for this equipment then it can be retrieved easily.

Machine MaintenancesCasesDeployed LocationsRelated Machine DetailsAttachmentsNotes

Title	Last Modified Date	Created Date
Sensitive	07/18/2011, 5:48 PM	07/18/2011, 5:48 PM

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6 DASHBOARD and REPORTS

Enhanced Operational and Financial view providing micro level details on the entire operations. TrackMe Dashboard can provide near real-time information to the managers at all levels. Operational and Maintenance Dashboards will help managers to analyze the work load and assign resources to resolve the issues on time and on budget. Financial Dashboards will help the managers in estimating the CASH FLOW for each Property Locations. The reports will provide immediate snapshot of all Accounts Receivables and Payables for each Property Location.

Note: Selecting or clicking the Dashboard graph will take you to the DETAIL Report.

List of Dashboard objects:

6.1 TrackMe Operations

This report provides information related to the TrackMe CASES. This dashboard provides a view of the entire operations on the Issues that are being reported and resolved for each Property Location and Units.

HomeTrackMe UsersChatterTrackMeCasesTrackMe SearchDashboardsTrackMeSetupTrackMeMaintenance SetupTrackMeFinancialsTrackMe Site Page

Go to Dashboard List

TrackMe Operations

Find a dashboard...EditCloneRefreshLast Refreshed: Today at 3:04 PM

Selsoft Dashboard

Location Report - All cases

City	IL	TX
Chicago	100	0
Dallas	0	35

Tracks All CASES regardless of STATUS for all Location by State.
Operational Guidance:
How many total Cases are reported all time for all the properties located in each State?

Aging report - Open Cases

Days Case Open	New	Assigned
0-1	12	3
1-2	12	3
2-3	12	3
3-4	12	3
4-5	12	3
5-6	10	3
6-7	5	3
7-8	3	3
8-9	3	3
9-10	3	3
10-11	3	3
11-12	3	3
12-13	2	3
13-14	1	2
14-15	9	2
15-16	8	2

Tracks AGING information for all OPEN CASES (Status is NEW and ASSIGNED).
Operational Guidance:
What is the age of open (not resolved) Cases at the time or generating this report?

Cases and its Status

Status	New	Assigned	Complete	Closed
New	118	8	1	3

Tracks ALL the CASES in different Status.
Operational Guidance:
What is the overall statistics of all the CASES regardless of their STATUS?

Priority Report - Open Cases

Priority: SLA Priority	Status
Critical	3
Assigned	3

Tracks CASES that are in OPEN STATUS (New or Assigned) for each PRIORITY.
Operational Guidance:
How many Cases are currently open and what priority they belong too?

Case Average Lag time by Case Category

Case Category: Type	Record Count	Average of days
Billing	1	8
Maintenance	3	49.33

Tracks Average LAG time for CASES by the CASE CATEGORY. LAG time is the difference between the CASE Start/ Open time and CASE Complete (Resolved) time.
Operational Guidance:
How much Average time it takes for the CASE of various Categories to reach its resolution stage?

Department Case Workload

Department Assigned Location Name	Record Count
Billing HQ	1
General All C.	1
General All C.	2
HVAC Dept.	1
Power Manag.	1
Plaza Tower	2

Tracks WorkLoad (Case Assigned) for each Department based on the CASES that are assigned to them.
Operational Guidance:
How many Cases are assigned to each Department?
Note: CASE that is in Assigned Status will be reported here.

SLA Violation Report by City/State Location

City	IL	TX
Chicago	2	0
Dallas	0	1

Tracks SLA (Service Level Agreement) violations for each City and State level.
Operational Guidance:
Property located in which City and State has Cases that are not resolved on time?

SLA Violation at Case Level by Location

Location Name	Total TrackMeCase
Plaza place	1
Plaza Tower	2

Tracks SLA (Service Level Agreement) violations for each Property Location.
Operational Guidance:
What type of Cases are not resolved on time for a specific Property Location?

SLA Violation by Department Level

The report returned no results.

Order Assignment: Department

Tracks SLA (Service Level Agreement) violations for each Department or Groups.
Operational Guidance:
What type of Cases are not resolved on time by which Group or Department?

SLA Violation at Case Level by Request Type

Case Category	Total TrackMeCase
Electric	1
HVAC - Cold	1
HVAC - Hot	1

Tracks SLA (Service Level Agreement) violations by each Case Category and Priority.
Operational Guidance:
What type of Cases are not resolved on time?

Monthly SLA Violation by Department Level

The report returned no results.

Violation Year/Month

Tracks Monthly SLA (Service Level Agreement) violations for each Department or Group Level.
Operational Guidance:
Which Department or Group is/are not able to resolved CASES assigned to them on time?

Monthly SLA Violation at Case Level by Location

Violation Year/Month	Location Name	Total TrackMeCase
2012/2	Plaza place	1
2012/2	Plaza Tower	2

Tracks Monthly SLA (Service Level Agreement) violations by each Property Location.
Operational Guidance:
Which Property Location is having issues with resolving the Cases on time?

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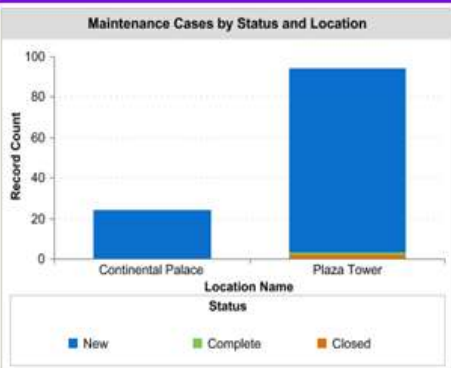
6.2 TrackMe Maintenance and Equipment Dashboard

This dashboard provides information related to Equipments, Preventive Maintenance, and Maintenance Case Status. It forecast the work load on preventive maintenance so that resources are aligned to handle the event.

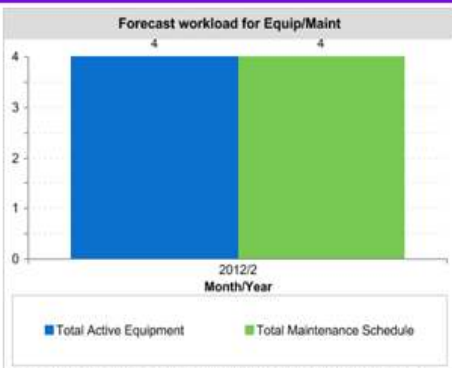
Go to Dashboard List

TrackMe Maintenance & Equipment Dashboard

Find a dashboard... Edit Clone Refresh Last Refreshed: Today at 5:00 PM

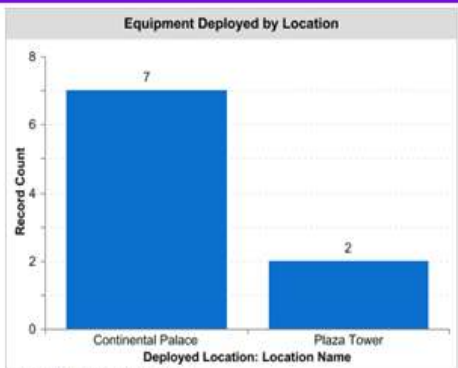


Tracks CASES that have MAINTENANCE Category by its STATUS for each Property Location.
Operational Guidelines:
How many MAINTENANCE cases by its STATUS for each Property Location?



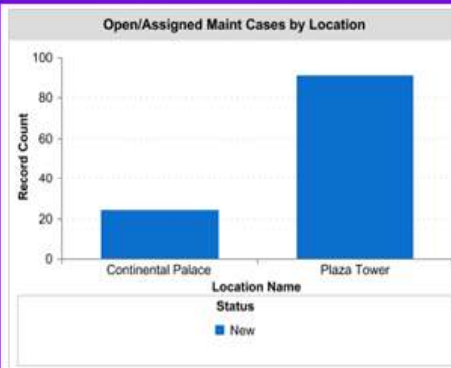
Forecast Workload for equipments within the Schedule Maintenance

Tracks the Actual WORKLOAD by each Equipment present under each MAINTENANCE SCHEDULE item.
Operational Guidelines:
What is the expected WORKLOAD based on the MAINTENANCE SCHEDULE setup?
How many total Equipments are there within those Maintenance Schedule?
Provide guidance on amount of work expected in future so that resources are aligned to handle the load.

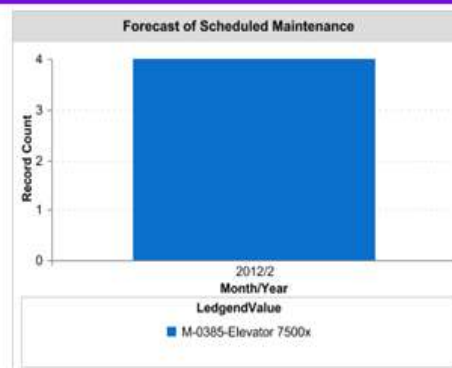


Count of all active Equipment

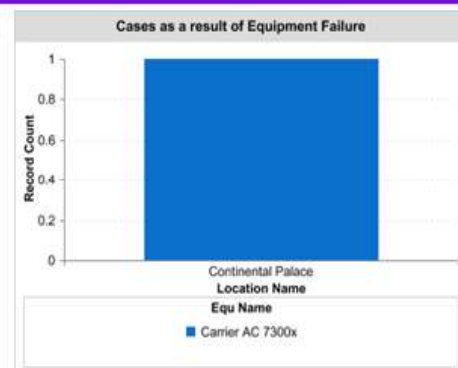
Tracks the Equipment that are deployed at each Location.
Operational Guideline:
How many total Active Equipments are currently deployed at each Property Location?
What is the total inventory regardless of the equipment type or distinction?



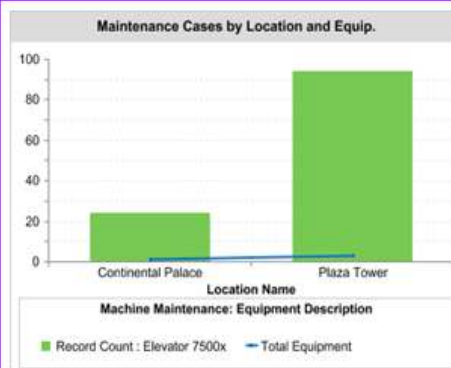
Tracks MAINTENANCE CASES that are OPEN (not resolved) for each PROPERTY LOCATION.
Operational Guidelines:
How many MAINTENANCE cases that are currently OPEN (New and Assigned) for each Property Location?



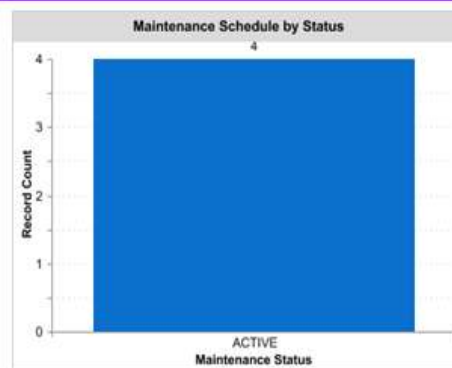
Tracks the Future MAINTENANCE work load by its Equipment description.
Operational Guidelines:
How many MAINTENANCE cases will be created in future and for what equipment?



Tracks CASES regardless of the CATEGORY (all) that are created as a result of equipment Failure.
Operational Guidelines:
How many Cases were reported and resolved as a result of Equipment failure for each Property Location?
Provides guidance in narrowing down possible Equipment failure that is responsible for generating more Cases for Resolution. It also helps in identifying a possible Equipment that may need replacement.



Tracks MAINTENANCE Category CASES for each Property Location by its Equipment. This graph shows that there were 20 cases in Continental Palace & 100 cases for Plaza Tower location. All the cases were for "Elevator 7500x" equipment.
Operational Guidelines:
How many MAINTENANCE cases are there and for what type of Equipment, for each Property Location?



Tracks the actual MAINTENANCE SCHEDULE records by its STATUS - ACTIVE OR INACTIVE.
Operational Guideline:
How many PREVENTIVE MAINTENANCE task are there and what is their Status?

6.3 TrackMe Financial Accounts Payable

This dashboard and reports provides a view of the entire Expense or ACCOUNTS PAYABLE activity at various levels like Property Location, Units within the Property Location, Lease, Tenant, and CASE. It helps analyze the CASH out-flow at various levels and helps the organization plan for fulfilling its obligation to make payments on time.

HomeTrackMe UsersChatterTrackMeCasesTrackMe SearchDashboardsTrackMe SetupTrackMeMaintenance SetupTrackMeFinancialsTrackMe Site Page

Go to Dashboard List

TrackMe Financial Accounts Payable

Find a dashboard...EditCloneRefreshLast Refreshed: Today at 10:00 AM

Summary of Account Payable

Invoice Month	Total Inv Amount	Total Paid Amount	Total Outstanding Amount	Total Write-off Amount
2012/1	\$2.60	\$1.05	\$2.60	\$1.55
2012/2	\$2.60	\$1.05	\$2.60	\$1.55

Current Financial Year

Tracks ACCOUNTS PAYABLE on a monthly basis. Provides a snapshot of all the payables - CASH OUT transactions. Financial Guidelines: What is the Total INVOICE amount payable, reimbursed, and Outstanding?

Forecast Invoice Payable

Invoice Due Month	Total Outstanding Amount
2012/2	\$2.60
2012/3	\$1.55

Current Financial Year

Tracks Future ACCOUNT PAYABLE on a Monthly basis. Provides a Snapshot of Payables - Cash Out, that is still pending. Financial Guidelines: What is the Forcast amount for Accounts Payable? (Transactions for which Payments are yet to be made are summarized on this Graph).

Past Due - Accounts Payable

Invoice Due Month	Total Outstanding Amount
2012/1	\$164.65

Current Financial Year

Tracks PAST DUE ACCOUNTS PAYABLE on a Monthly basis. Provides the snapshot of pending PAYABLES for the past 120 days. Financial Guidelines: What is the total amount that past the payment due date? Helps in identifying which bill are not paid.

Accounts Payable by Payment Status

Invoice Due Month	Partial Payments Made	Zero Payments Made	Past-Due
2012/1	\$0.16	\$0.35	\$0.16
2012/2	\$2.60	\$1.20	\$0.35
2012/3	\$0.35	\$0.35	\$0.35

Current Financial Year

Tracks ACCOUNTS PAYABLE transactions by its COLLECTION STATUS. Financial Guidelines: What is the snapshot on payables on a monthly Basis? It helps to identify the areas where payments are past due so that the Property Manager can take appropriate decision on prompt payments.

Location Level - Accounts Payable

Location Name	Total Inv Amount	Total Paid Amount	Total Write-off Amount
Continental Palace	\$0.40	\$0.40	\$0.40
Plaza place	\$2.25	\$1.05	\$1.20
Sample Location	\$2.50	\$2.50	\$2.50

Current Financial Year

Tracks ACCOUNTS PAYABLE transactions at LOCATION LEVEL. It provides a snapshot of PAYABLES for each LOCATION. Financial Guidelines: What is the Total amount to be Paid, Payments Made, and, Payments written-off for each location? It helps identify Property that may have potential issues with making payments.

Units Level - Accounts Payable

Unit Name	Total Inv Amount	Total Paid Amount	Total Write-off Amount
CP-002	\$0.05	\$0.05	\$0.05
Primary 01	\$2.25	\$1.05	\$1.20
Suite 100	\$2.50	\$2.50	\$2.50

Current Financial Year

Tracks ACCOUNT PAYABLE Transactions at UNIT LEVEL. Each Property Location must have atleast ONE UNIT. Hence this graph/report provides a snapshot of Receivables for each UNIT. Financial Guidelines: What is the Total amount to be Paid (invoice), Payments Made, and, amount written-off for each Location? It helps identify the UNITS within a Property Location that may have potential issue with Payables.

Lease Level - Accounts Payable

Lease Title	Total Inv Amount	Total Paid Amount	Total Write-off Amount
Ming Garden	\$52.15	\$52.15	\$52.15

Current Financial Year

Tracks ACCOUNTS PAYABLE Transactions at Lease level. It provides a snapshot of Payables/expenses incurred for a Lease. Financial Guidelines: What is the Total amount to be paid (invoice), Payments Made, and, Write-off for each Lease? It helps identify LEASE AGREEMENTS for which expenses are incurred.

Tenant Level - Account Payable

Tenant Full Name	Total Inv Amount	Total Paid Amount	Total Write-off Amount
Jack Langley	\$47.92	\$47.92	\$47.92

Current Financial Year

Tracks ACCOUNTS PAYABLE Transactions at TENANT LEVEL. Expense Transactions that are specifically for TENANT are reported on this Report. Financial Guidelines: What is the Total amount to be paid (invoice), Payments Made, and write-off for each Tenant? It helps identify special charges incurred for Tenants.

Case Level - Accounts Payable

Case ID	Total Inv Amount	Total Paid Amount	Total Write-off Amount
O-05817	\$350.00	\$350.00	\$350.00

Current Financial year

Tracks ACCOUNT PAYABLE transactions at CASE LEVEL. It provides a snapshot of PAYABLES or EXPENSES incurred for resolving the CASE. Financial Guidelines: What is the Total amount to be paid (invoice), Payments Made, and, write-off at CASE level? It helps identify expenses incurred in resolving the issues reported through the CASE.

Accounts Payable Aging Report

Invoice Month	Record Count (0 to 30)
2012/1	3
2012/2	2

Current Financial Year

Tracks ACCOUNTS PAYABLE Transactions by their AGE. It helps identify the trend in the payments made on the all Invoices. Financial Guidelines: What is the timeline it takes between receiving Invoice (expense) and Making Payments?

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6.4 TrackMe Financial Accounts Receivable

This dashboard and reports provides a view of the entire Income or ACCOUNTS RECEIVABLE activity at various levels like Property Location, Units within the Property Location, Lease, and Tenant. It helps analyze the CASH IN flow at various levels and helps the organization to decide on properties that are generating profit or loss.

Note: There is no Income generated at CASE Level, and, so no reporting data is gathered at this level.

HomeTrackMe UsersChatterTrackMeCasesTrackMe SearchDashboardsTrackMe SetupTrackMeMaintenance SetupTrackMeFinancialsTrackMe Site Page

Go to Dashboard List

TrackMe Financial Accounts Receivable

Find a dashboard...EditCloneRefreshLast Refreshed: Today at 5:46 PM

Accounts Receivable Summary Report

Bill Month	Total Bill Amount	Total Amount Received	Total Amount Outstanding	Total Write-off Amount
2012/1	\$3.93	\$3.93	\$0.00	\$0.00
2012/2	\$1.50	\$1.50	\$0.00	\$0.00

Past Due Collection Summary

Payment due Month	Total Amount Outstanding
2012/1	\$8.25
2012/2	\$1.20

Forecasted Collection Summary

Payment due Month	Forecasted Total Amount
2012/2	\$1.08

Tracks ACCOUNT RECEIVABLE on a Monthly basis. Provides the snapshot of receivables.
Financial Guidelines:
What is the total amount that is billed or Invoiced?
What is the amount that is reimbursed?
What is the amount that is still outstanding?

Tracks PAST-DUE ACCOUNT RECEIVABLE on a Monthly basis. Provides the snapshot of pending receivables for the last 120 days.
Financial Guidelines:
What is the total amount that past the payment receivable date?

Tracks Future ACCOUNT RECEIVABLE on a Monthly basis. Provides the snapshot of receivables for which the Bill and Invoice is raised, but the payment is still pending.
Financial Guidelines:
What is the forecast amount for account receivable? (Transactions that have Payment receivable date in future will be summaried on this graph).

Lease (effective) Bill Mode by Location

Location Name	Manual	Auto
Continental Palace	0	1
Plaza Tower	1	0

Lease Status by Location

Location Name	Active
Continental Palace	1
Plaza Tower	1

Lease Level - Accounts Receivable

Lease Title	Total Bill Amount	Total Amount Received	Total Write-off Amount
China Garden	\$1.50	\$0.00	\$0.00
Ming Garden	\$2.28	\$0.00	\$0.00

Tracks LEASE BILLING STATUS for each Property. It provides a view on the LEASE for which the Property Manager has to manually trigger bill or Invoice on a recurring basis.
Financial Guidelines:
How many invoices are billed Automatically on the scheduled Bill date? (Auto generate the Transaction for AR)
How many Lease requires manual billing to trigger to generate the Invoice or Accounts Receivable transaction?

Tracks LEASE STATUS for each Property Location. It provides status on the Lease that are Active or Inactive for each property Location.
Financial Guideline:
How many LEASE Agreement are in Active or Inactive status?

Track ACCOUNT RECEIVABLE transactions at LEASE LEVEL. It provides a snapshot of Receivables at each LEASE LEVEL.
Financial Guideline:
What is the total BILL, Received, and Write-off amount for each Lease? It helps identify LEASE agreement that may have potential issue with making Payments.

Account Receivable by Collection Status

Payment due Month	Full Payment Received	Zero Payments Received	Past-Due
2012/1	\$8.25	\$0.00	\$0.00
2012/2	\$1.20	\$0.00	\$1.08

Location Level - Accounts Receivable

Location Name	Total Bill Amount	Total Amount Received	Total Write-off Amount
Continental Palace	\$2.28	\$0.00	\$0.00
Plaza Tower	\$1.50	\$0.00	\$0.00
Sample Location	\$1.52	\$1.50	\$0.02

Unit Level - Accounts Receivable

Unit Name	Total Bill Amount	Total Amount Received	Total Write-off Amount
CP-002	\$2.28	\$0.00	\$0.00
Suite 100	\$3.03	\$1.50	\$0.00

Tracks ACCOUNT RECEIVABLE transactions by its COLLECTION STATUS.
Financial Guidelines:
What is the snapshot on Collection of the payments on a Monthly basis?
It helps to identify the areas where payments are past due so that the Property Manager can send reminder to the Lessee.

Tracks ACCOUNT RECEIVABLE transactions at LOCATION LEVEL. It provides a snapshot of RECEIVABLES at each LOCATION.
Financial Guideline:
What is the Total amount BILLED, RECEIVED, and WRITTEN-OFF at each LOCATION? It help identify Property that may have potential issue with RECEIVABLES.

Tracks ACCOUNT RECEIVABLE Transactions at UNIT LEVEL. Each property location must have atleast ONE UNIT. Hence this graph/report provides a snapshot of Receivables for each UNIT.
Financial Guidelines:
What is the Total amount BILLED, RECEIVED, and WRITTEN-OFF at each UNIT? It helps identify the UNIT within a property location that may have potential issue with RECEIVABLES.

Account Receivable Aging Report

Bill Month	0 to 30	30 to 60
2012/1	3	2
2012/2	1	0

Tenant Level - Accounts Receivable

Tenant Full Name	Total Bill Amount	Total Amount Received	Total Write-off Amount
Jack Langley	\$125.00	\$0.00	\$0.00

Tracks ACCOUNT RECEIVABLE transactions by their AGE. It helps identify the trend in Receiving payments on the Invoices that you have raised.
Financial Guideline:
What is the timeline it takes between BILLING and RECEIVING PAYMENTS?

Track ACCOUNT RECEIVABLE Transactions at TENANT LEVEL. Transactions that are specifically for Tenant are reported on this Report.
Financial Guideline:
What is the Total amount BILLED, RECEIVED and WRITTEN-OFF for each Tenant? It helps identify special charges incurred for specific tenant which are not part of regular Billing process.

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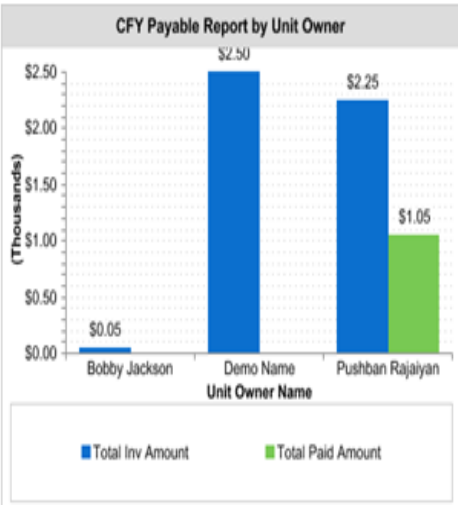
6.5 TrackMe Financials Miscellaneous Dashboard

This dashboard and reports provides a view on miscellaneous financial items like Accounts Payable and Accounts Receivable reports at UNIT OWNER level. These reports are used by the Property Manager (Not the owner) to provide expense and income statement on a monthly basis to the individual Property Owner.

Go to Dashboard List

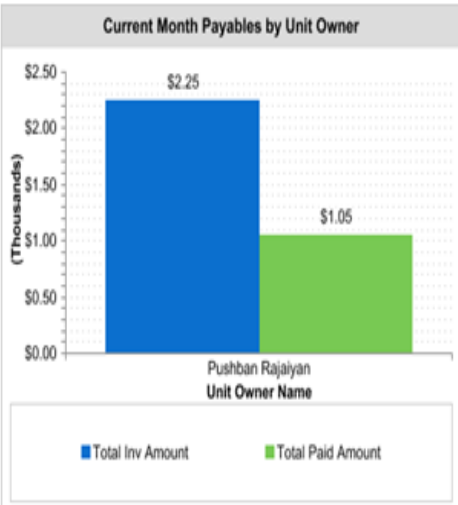
TrackMe Financial Miscellaneous Reports

Find a dashboard...EditCloneRefreshLast Refreshed: Today at 4:22 PM



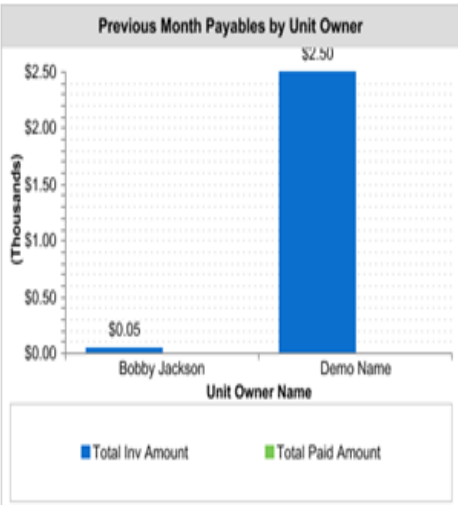
Current Financial Year

Tracks CFY (Current Financial Year) ACCOUNTS PAYABLE for each UNIT OWNER. It provides reports for all Expense incurred for a given Property Location and its individual Units. Financial Guidelines: What is the Total Expense incurred, and, payments made for each Unit? This report is useful for providing expense report to the Property Owner by Property Managers.



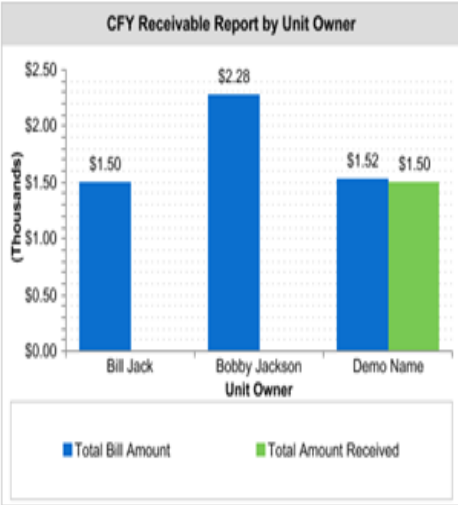
This Month

Tracks Current Month ACCOUNT PAYABLE for each UNIT OWNER. It provides report of all expenses incurred in the Current Month for each Property Location and its Units. Financial Guidelines: What is the current month Total Expense incurred, and payments made at each Unit level? This report is useful for providing expense report to the Property Owner.



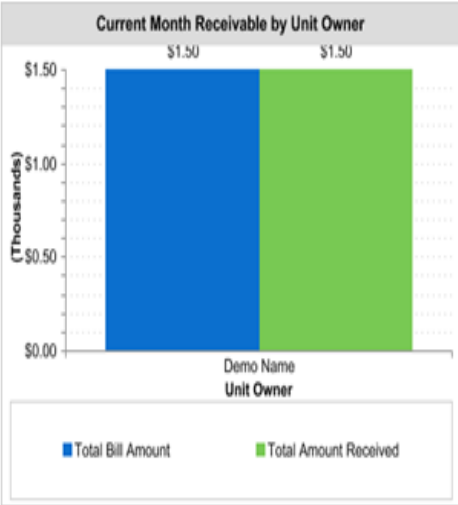
Last Month

Tracks Previous Month ACCOUNTS PAYABLE for each UNIT Owner. It provides report of all EXPENSES incurred in Previous Month for each Property and its Units. Financial Guidelines: What is the Previous month Total Expense incurred, and Payments made at each UNIT Level? This report is useful for providing expense report to the Property Owner.



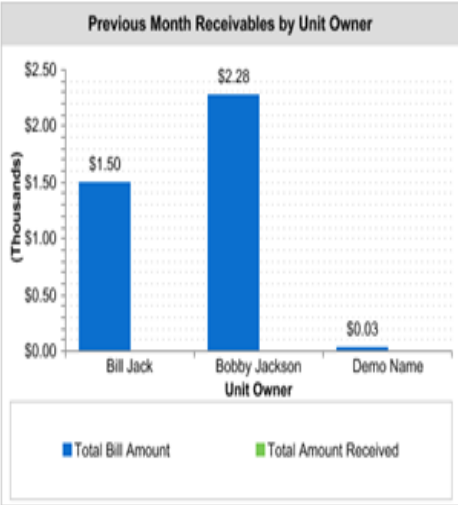
Current Financial year

Tracks CFY (Current Financial Year) ACCOUNTS RECEIVABLES for each UNIT OWNER. It provides reports for all the Invoices or Bills raised for a given property Location and its individual Units. Financial Guidelines: What is the Total Invoice or Bill raised, and Payments Received for each Unit? This report is useful for providing expense report to the Property owner by Property Manager.



This Month

Tracks Current Months ACCOUNT RECEIVABLES for each UNIT OWNER. It provides reports for all the Invoices or Bill raised for a given Property Location and its individual Units. Financial Guidelines: What is the current Month total invoice or bill raised, and payments received for each unit? This report is useful for providing expense report to the Property Owner by Property Manager.



Last Month

Tracks Previous Month ACCOUNT RECEIVABLES for each UNIT OWNER. It provides reports for all the Invoice or Bill raised for a given Property Location and its Individual Units. Financial Guidelines: What is the Previous Month Total Invoice raised, and Payments received for each Unit? This report is useful for providing expense report to the Property Owner by Property Manager.

7 Functional Flow of the Application:

In this section we shall discuss the minimum data required to start using the application.

- What minimum master data is required in any TABs in order to start creating a TrackMe Case?
- What data is required for setting up the Maintenance schedule for Equipment?

7.1 Creating a TrackMe Case with minimum data:

- 7.1.1 Step 1: Create an entry in the LOCATION Tab.
- 7.1.2 Step 2: Create an entry in the REQUEST-TYPE that will classify the Case in certain category
- 7.1.3 Step 3: Start creating the TrackMe Case.
 - 7.1.3.1 The DEPARTMENT and it USERS are not defined because they are not mandatory to be defined. Hence, when the case is created, it will remain in “New” status. The owner of the Case will then have to change the status manually by editing the Case to “Assigned” -> “Complete” -> “Close”. During its journey from “New” to “Close” the case will not be assigned to any Department or any users.
 - 7.1.3.2 Since the Departments are not defined, there is no need to define any data for the BUSINESS FLOW. The primary objecting of defining a BUSINESS FLOW is to auto-assign the case to specific Department.
 - 7.1.3.3 The SLA and Priority is not defined. The drop down list on the Case will remain empty. There will not be any data for the SLA Violation because Due Dates will not be set for the Cases.

7.2 Creating TrackMe MAINTENANCE with minimum data:

- 7.2.1 Step 1: Create an entry in the EQUIPMENT tab.
- 7.2.2 Step 2: Create an entry in the PARTS tab.
 - 7.2.2.1 You can create a DUMMY part that you can use for all the Equipment.
- 7.2.3 Step 3: Create an entry in the BARCODE/EQUIPMENT INVENTORY tab.
 - 7.2.3.1 BARCODE can be any number. If an existing inventory management is tracking the equipment with a special code then that can also be used here to identify the same equipment.
 - 7.2.3.2 Any BARCODE Scanner with a Plug-and-play function can be used to scan the 2D Barcode from the tag on the equipment itself.
 - 7.2.3.3 If you have four elevators of same type (Single EQUIPMENT type/model) on your property then you will have to create four unique BARCODE and SUBID entries for the same EQUIPMENT and LOCATION.
- 6.2.4 Step 4: Create an entry in the MAINTENANCE tab.
 - 6.2.4.1 Please make sure that a MAINTENANCE activity can only be created if you have matching data in the following tabs: LOCATION, EQUIPMENT, PARTS, and, BARCODE.
 - 6.2.4.2 Add the equipment by selecting the BARCODE from the drop down from the Section Assign Equipment.
 - 6.2.4.3 Please remember to put the number of days between Maintenance, and, Activate the Entry.
- 6.2.5 Step 5: If you want the Maintenance Case to be created as-soon-as-possible:
 - 6.2.5.1 Edit the entry from the list of MAINTENANCE.
 - 6.2.5.2 Check the field “ASAP Create Case: “, and, “Save” the MAINTENANCE record.
 - 6.2.5.3 Case will be created once the “Save” is complete.

7 Create TrackMe Cases from External Website Users

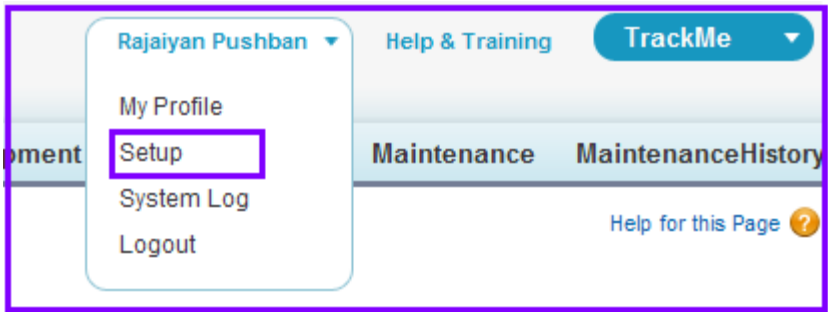
You will be registering a domain and then creating a site where your Clients or Tenant or External Users (any one) can create cases in your TrackMe RE Application. The Webpage can be customized to suit your business requirement. Please contact Selsoft Inc for additional assistance for customization. The Webpage used here is a basic template that is provided with this Application.

By activating this webpage interface, you are enabling your User Community to report issues via the website page. You can direct your clients from your website by incorporating the URL that you will create after following the below steps.

Steps to setup the Website interface:

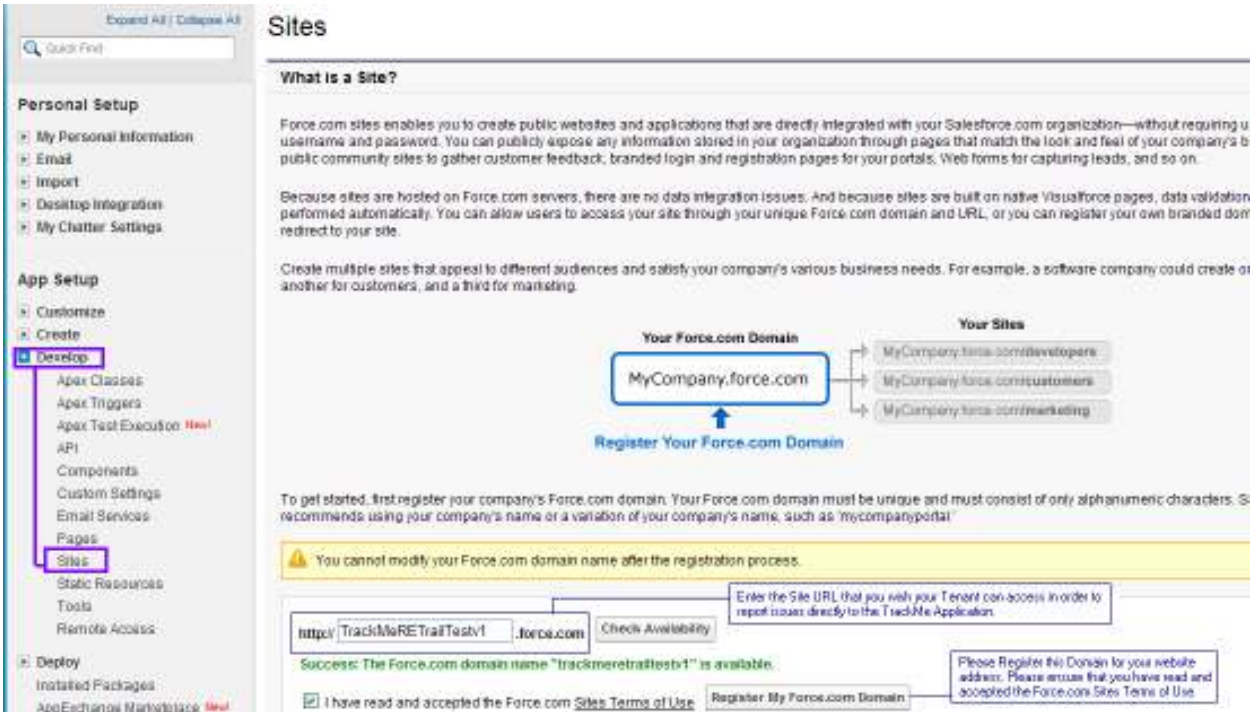
Note: The below steps must be performed by a user having System Administrator Profile.

Step 1: Select the “Setup” Option from the Top menu on your screen.



Step 2: Select the “Site” Option from App Setup -> Develop.

Step 3: Create the Site Domain that you want your external clients to use



Step 4: Once the Domain is created successfully, please select “New” from the Sites Section.

Sites

What is a Site?

Force.com sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Force.com servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on coll performed automatically. You can allow users to access your site through your unique Force.com domain and URL, or you can register your own branded domain or s redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site f another for customers, and a third for marketing.

Your Force.com Domain

MyCompany.force.com

Your Sites

MyCompany.force.com/developers

MyCompany.force.com/customers

MyCompany.force.com/marketing

Create Your Force.com Sites

Your Force.com domain name is trackmeretrailtestv1.force.com

Force.com Sites [Terms and Conditions](#)

Once the Site domain URL is created, please select the "New" button from the Sites Section.

Sites (trackmeretrailtestv1.force.com)

New

Site Label ↑	Site URL	Site Description	Active	Last Modified By
No records to display.				

Step 5: In the Site Edit page, please provide relevant information. The key element here is the ACTIVE SITE HOME PAGE. This is the web page that you want your external clients to view. Also remember to select the “Active” check box to make this website available.

Site Edit

New Site

Save

Cancel

Site Label

TrialTestForTrackMeREv1

Enter the Site Label and Site Name. This used for identifying the Site from your Environment.

Site Name

TrialTestForTrackMeREv1

Site Description

Site Contact

Rajaiyan Pushban

Site Contact can be any one from your User community.

Default Web Address

http://trackmeretrailtestv1.force.com/

Custom Web Address

Active

☒

Active your website

Active Site Home Page

TrackMeHome

From the Lookup List of Pages, please select the TrackMeHome page for using the default template that can be used by your Tenant to create new cases.

InActive Site Home Page

InMaintenance

Site Template

SiteTemplate

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

URL Rewriter Class

Enable Feeds

☐

Save

Cancel

Lookup

Search

TrackMeHome

Get

Select the Lookup icon next to Active Site Home Page and then search for TrackMeHome page. This page is designed for the purpose of enabling External users to report issues.

< Clear Search Results

Search Results

Label	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date
TrackMeHome	TrackMeHome	trackme_RE	18.0	The Home page for basic TrackMe application	RPush	7/15/2011

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Step 6: Once you save the Site details, you will be shown the Default Web Address for this webpage. This is the URL that you will enter on your browser to access the Create TrackMe Case page. From this page select the option “Public Access Settings”.

Site Details

TrialTestForTrackMeREv1

Back to List: Sites

Site Detail

EditPublic Access SettingsLogin SettingsURL RedirectsDeactivate

Site Label	TrialTestForTrackMeREv1	Site Name	TrialTestForTrackMeREv1
Site Description	Homepage to create the Cases can be accessed via the Default Web address link.	Site Contact	Rajshivan Pushban
Default Web Address	http://trackme.retrialtestv1.force.com/ (Preview as Admin)	Active	☐
Secure Web Address	https://trackme.retrialtestv1.secure.force.com/ (Preview as Admin)	Login	Not Allowed
Custom Web Address		Active Site Home Page	trackme_RE TrackMeHome (Preview)
Site Favorite Icon		Inactive Site Home Page	InMaintenance (Preview)
Site Robots.txt		Site Template	trackme_RE SiteTemplate (Preview)
Enable Feeds	☐	Analytics Tracking Code	
URL Rewriter Class		Created By	Rajshivan Pushban 7/20/2011 9:59 AM
Last Modified By	Rajshivan Pushban 7/20/2011 9:59 AM		

Site Visualforce Pages

Edit

Visualforce Page Name	AppExchange Package Name
BandwidthExceeded	
ChangePassword	
...	

Public Access Settings

Login Settings

URL Redirects

Deactivate

Selected the Public Access Setting for access to the website. It will display a Guest user profile which needs modification before the Web page can be accessed by External Clients to create new Cases.

Step 7: Select the “Edit” button from this Profile view page.

Profile

TrialTestForTrackMeREv1 Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile

Login IP Ranges (0)Enabled Apex Class Access (0)Enabled Visualforce Page Access (13)

Profile Detail

EditView Users

Select Edit from this Profile View and go to the Section "Custom Object Permission".

Name	TrialTestForTrackMeREv1 Profile	Custom Profile	☒
User License	Guest User License		
Description			
Created By	Rajshivan Pushban 7/20/2011 9:59 AM	Modified By	Rajshivan Pushban 7/20/2011 10:31 AM

Page Layouts

Standard Object Layouts

	Home Page Layout	Account	Asset	Campaign	Event	Lead	Opportunity	Opportunity Product
Home Page Default	[View Assignment]				Event Layout			
Account Layout		[View Assignment]			Lead Layout			
Asset Layout			[View Assignment]		Opportunity Layout			
Campaign Layout				[View Assignment]	Opportunity Product Layout			

Step 8: Go to the section “Custom Object Permissions” and give privilege to certain custom objects like LOCATION, REQUEST-TYPE, TRACKME ANNOUNCEMENT and TRACKME CASES. Once complete please click the “Save” button for the changes to be effective.

Step 9: You can test the webpage.

Log-out from your current TrackMe environment. Open a new browser window, and, type in the URL for the webpage. You can find this URL from the View screen presented in the Step 6 above.

Your page should display as below:

Clients, Tenants, or any external user can create cases using the URL that you have created and linked to this webpage.