

Frequently Asked Questions

Q: What do I do with Operate?

A: **Capture Information during property visits on a mobile device.** Making this far faster and easier than via other methods is a major focus of the product. This is mostly in the form of describing **Items** which can be **Issues**, **Enhancements** or **Highlights**. Then this information is used by Operate to help you much more easily:

- Review and update property information for your own benefit at any time
- Coordinate internal resources. Examples include having the right Crews resolve Issues or Estimators size and propose Enhancements.
- Communicate status with customers via an on-line Portal
- Review your book of business to decide where to spend time.

You can also view and edit all of the same information from a computer via browser.

Q: I just logged in, what am I seeing?

You start out in the *Properties* view. The default is to see a list view of the *Properties* where you are the *Account Manager*. If you have no *Properties* yet, you can add new *Properties* to the system from here. You can also switch to a *Map* view.

Tip: In some cases, your company may start using Operate without any Properties in the system initially. In this case this view will start out empty. You will be using the app to add Properties as you visit them.

Using the filter buttons at the top that can be turned on or off by tapping, you can see all the *Properties* in your branch, all the *Properties* where you are the *Account Manager*, *Properties* that you have not visited for a while and/or *Properties* with *Items* that need to be assigned to someone.

You see information about a *Property*, including general information, *Issues*, *Enhancements* and *Highlights*, by clicking the *right arrow*.



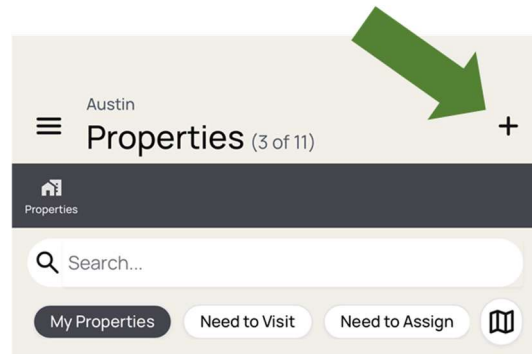
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Q: How do I add one of my Properties to the system?

A *Property* is a site, with an *Account Manager* and a *Contact* (property manager or customer) and a location. General information as well as *Items* which can be *Issues*, *Enhancements* or *Highlights* are all associated with a *Property*.

When you first log in you start in the Properties View which can show a list view or map view of Properties in your branch, with filters.

1. To create a new *Property* click the +.
2. A *Property* must have an address. Operate uses your current location to auto-complete this, but you can edit it or do a search to identify a *Property*.
3. Save the *Property* and it will now be added to your *Property Map* and *List* and you can select it to update and add Items to.

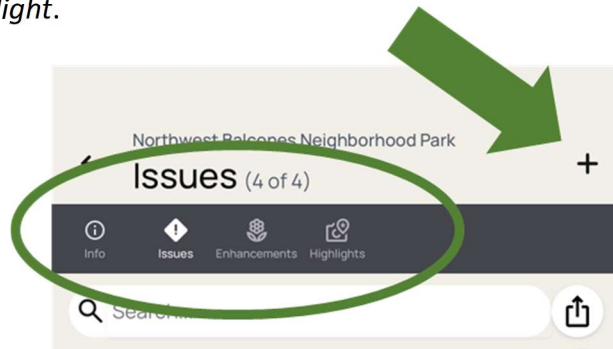


Q: How do I capture an Issue, Enhancement or Highlight for a property?

These are different kinds of Items you create for a *Property* once you have selected it. This is something you do usually while on site, at the location of the *Issue*, where you propose an *Enhancement*, or at something you want to *Highlight*.

You start creating an Item by first selecting *Issue*, *Enhancement* or *Highlight* in the bar at the top. Then click the +.

There are two options. *Quick Mode* and *Advanced* mode. *Quick Mode* is the default. *Advanced* mode can be selected and then remains on for when you create new Items until unselected.



Quick Mode: The fastest easiest way. Select whether it is an Issue, Enhancement or Highlight. Take a Picture, voice record a Description and Save. Operate processes this and auto-completes everything in the Item for you to review at your convenience.

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Tip: In Quick Mode when you save an Item, a new Item is automatically started, defaulting to being an Issue. If you are done for now, just cancel out of this new Item.

Advanced Mode: Still quick and easy, but with more steps to allow you to review and manually make changes as you go. The first pane lets you start with a picture or pictures, a video, a voice recording or attach a file. The next pane displays and lets you change the location on a map, the third step lets you see all the details and edit them. Like in Quick Mode - Operate auto-completes everything so you just make edits where needed.



Tip: Quick mode is ideal if you want to walk around and quickly capture Items, then go through them back in your vehicle or office to review and edit them. Advanced Mode is ideal if you want to spend a little more time to capture everything completely and correctly at the site of the Issue, Enhancement or Highlight from the start.

Q: What's in an Issue, an Enhancement and a Highlight.

These are three different kinds of Items for a *Property*. Every Item has the following, all of which can be edited at any time:

- *Content*, meaning pictures, videos, voice recordings or attached files.
- A *Location*. This is automatically captured and mapped when the Item is created and the pin can be manually moved. If you are not on the *Property* when the Item is created, the pin is dropped in the center of the *Property*.
- A name and description.
- A *Property*.
- Reported By: Defaults to creator.
- A Service Line.
- Assigned To: To notify the appropriate Crew Lead or other internal personnel of the Item needing attention.
- A toggle to set whether this Item should be accessible via the *Customer Portal*
- A toggle to indicate if the Item was reported by the customer.

Then each Item type has some things unique to the type you have selected based on what they are.

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Issues

- Priority: Routine or Urgent
- Due Date: Next Visit, ASAP or a custom date
- Status options for tracking Issue progress

Enhancements

- Purpose: Functional, Safety or Aesthetic
- Estimated Area (sf)
- Estimated Cost (\$)
- Status options for tracking proposal and approval status

Highlights

- Purpose: Watch Area, Call Out (for discussion), Shout Out (for recognition)
- Status options for tracking when a Highlight is still relevant

Q: How do I Edit existing Issues, Enhancements or Highlights

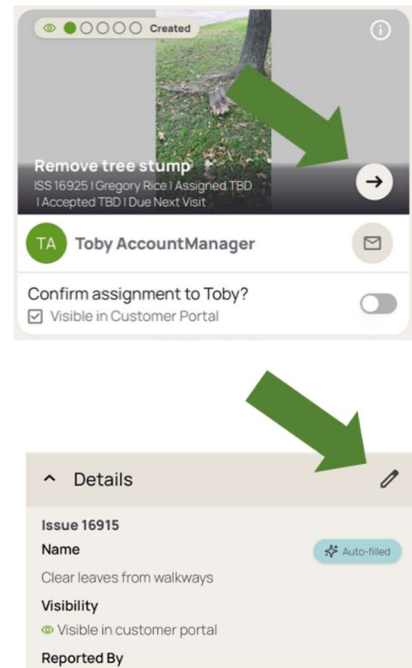
Items (*Issues, Enhancements, Highlights*) are always associated with a *Property*.

To see the existing Items, select a property from the Properties view by clicking the right arrow.

Once in the Property View you can select issues to review and edit by clicking the right arrow for that Issue.

When you open an *Issue* you will see it's information organized into 3 sections, Content for media and attachments, Details for Item specific information, Location for map pin location, and Status History which cannot be edited. To edit anything in the first 3, click the pencil in the title bar. Make your changes and then select Update Issue.

This is the same whether you are using a phone, a tablet or a web browser on a computer.

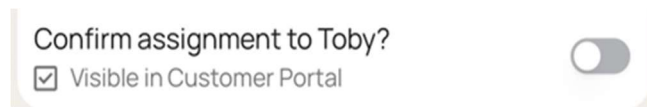


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Q: How do I assign an Issue and what happens when I assign an Issue to someone?

You assign an *Issue* by verifying the *Assigned To* person that Operate guessed for you or changing it, then changing the status of the *Issue* to Assigned. There is a *Convenience Toggle* so you can do this when ready without having to open the *Issue*.

Tip: The “Assigned To” person is not notified until you change the Status to Assigned. They can then Accept the assignment of the Issue or reassign it if they are the wrong person. Clicking the Convenience Toggle changes the status for you.



Once someone is Assigned to an *Issue* they can update the Status, Description and Add Content so that they can easily update when work has started, has completed, and for example attach a picture of a resolved *Issue*.

Enhancements work in a similar manner for coordinating with estimation and execution personnel.

Q: How do I share information with customers using the Portal

Once you start using Operate to capture *Property* information, you don't have to do anything to create the Customer Portal.

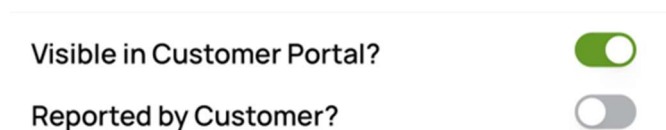
The *Portal*, accessed via a customer specific url using a web browser, has the same layout you see in your browser view, tailored for customer use and without Edit privileges.

Customers receive the URL in a summary site visit or update e-mail issued by Operate using criteria set by your System Admin reflecting your company's policy.

There is no login required.

Customers see a filterable Item List on the left, and a map in the main pane with clickable pins for Items (Issues, Enhancements and Highlights). They can open Items and review details.

In your view of Items there is a toggle marked "*Visible in Customer Portal*". By default, it is off. No Item is visible in the Customer Portal until you select it to be included using this toggle.





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Q. Can I maintain an Enhancement Catalog to be ready at budgeting time and end of year?

Yes. Create Enhancements and set the to be *Visible to Customer*. Now the customer can filter on Enhancements in their Portal to review Enhancements suggestions by Status.

Set the Status to Created so your customer can see everything you suggest. Set the status to Requested when the customer selects an Enhancement they would like estimated and plan to proceed with. Set the status to Submitted when the Enhancement is being designed and estimated.

Q: How do I see properties that I have not visited recently?

In your Properties View select the Map. Pins for properties are color coded based on how long it has been since the last time Operate detected a visit using GPS. Green properties are 30 days or less. Orange are 30-60 days. Red are more than 60 days.

Tip: To see more information about a property you have not visited for a while, click on the pin, then the right arrow. You can see the status of any Open Issues and any Enhancement opportunities that have been identified.

Q: How should I have Location Services set for Operate?

Operate will prompt you to allow location tracking.

Ideally set location tracking to *"Always"*. This will allow you to receive notifications when you arrive at a property saving you some clicks, and allow colleagues to know where you are.

Operate will work if you set location tracking to *"While Using the App"*. This is necessary to allow locations to be set for *Properties, Issues, Enhancements* and *Highlights*.

Q: Does Operate work on Android?

Yes. Android, iOS and browser access are all supported. Even if a mobile device is unsupported (other than Android or iOS), you can use its browser to access Operate.