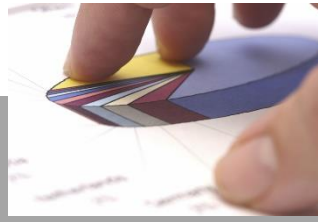




SynergyMMS[®]

Operational Efficiency System



Multilingual Productivity Tools That Create Departmental Synergy

User Manual

Version 3.22.5

May 2022

SynergyMMS App 2.0.63

PerfectRoom App 2.2



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SYSTEMS ASSOCIATES INC.

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- Choose option 4 or SynergyMMS
www.synergymms.com

The best guest complaint is the one that never happens.[®]

Clicking on the chapter in the list below will take you there.

CHAPTER 1 SYNERGYMMS: AN INTRODUCTION	1
CHAPTER 2 SYNERGYMMS: SETUP	13
CHAPTER 3 SYNERGYMMS: ENTERPRISEVOICE	50
CHAPTER 4 SYNERGYMMS: WORK REQUESTS	52
CHAPTER 5 SYNERGYMMS: PREVENTIVE MAINTENANCE	83
CHAPTER 6 SYNERGYMMS: REPORTS	109
CHAPTER 7 SYNERGYMOBILE	128
CHAPTER 8 SYNERGYMMS: INVENTORY	139
CHAPTER 9 PERFECTROOM®	144
CHAPTER 10 SYNERGYMMS: INTERFACES	163
APPENDIX 1 - SYNERGYMMS SETUP PREFERENCES	171
APPENDIX 2 - SYNERGYMMS SETUP CONTROL KEYS	171
APPENDIX 3 - SYNERGYMMS RETENTION	172

Chapter 1 SynergyMMS: An Introduction

Synergy: syn·er·gy /'sɪnərjē/

Noun: The interaction or cooperation of two or more organizations, substances, or other agents to produce a joint effect greater than the sum of their separate effects.

SynergyMMS is a property-wide solution that improves workflow through automation and efficiency. By supplying unique interfaces that address both technical and language barriers, **SynergyMMS** creates *synergy* between the various departments involved in the maintenance process. The result is not only cost savings, but also improved quality of the assets and improved guest experience.

SynergyMMS is a dynamic and robust product with a rich interface. The key features that many of our users have come to know and trust are still at the core of **SynergyMMS**. Those users who are new to Maintenance Management with **SynergyMMS** should know that you and your team have all the necessary tools to run your property effortlessly and entirely.

Maintenance is not solely limited to the Engineering Department. In fact, Engineering plays only a single part in the maintenance process and cannot hope to do all that needs to be done without the participation of the other departments. The following is a look at the primary challenges of integrating the other departments, as well as the **SynergyMMS** products that support their efforts, into the maintenance process:

Housekeeping needs a way to conveniently report issues from the guestrooms ([SynergyMMS Enterprise Voice](#), [PerfectRoom®](#), or [SynergyMobile](#)). GRAs often see maintenance issues but may have difficulty reporting issues accurately and/or in a prompt manner. Many Housekeeping departments also want a way to track and assign rooms for cleaning ([PerfectRoom®](#) (add-on module)).

Front Desk/PBX needs a way to quickly enter issues ([FasTrax](#) or [QuikTicket](#)) and get them into the hands of the right people ([Pooling](#) or [Outputs dispatching](#)). They do not have time to spend finding people or writing lengthy descriptions of work ([Task Codes](#)).

Management needs to know what issues need attention, when those issues happened, and how often issues are happening ([Reports](#) / [Scheduled Emailed reports](#)). Often, management cannot get the information needed to make critical decisions about staffing or budgets.

Engineering is the mobile problem solver ([2-way Dispatching](#), [SynergyMobile](#), and [SynergyMMS Enterprise Voice](#)). They need a way to support communication with the other departments while on-the-go so they can be aware of evolving issues. They need tools that make them fast and efficient but also reliable and accurate when it comes to maintenance tasks. They also need to compile information for reporting purposes.

Many properties have used a manual means of reporting issues over the years, and while this works, **SynergyMMS** takes it to the next level by allowing everyone to see what they need when they need it by automatically refreshing as new data is added. **SynergyMMS** has an easy-to-learn interface that takes seconds to enter data and mere minutes to run reports.

Now is the time to Empower Your People and get started with SynergyMMS.

The Basics

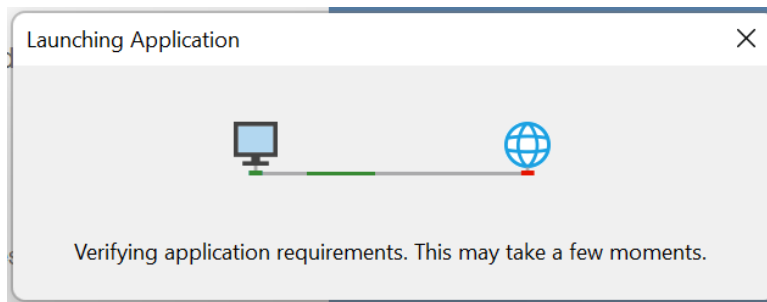
Here is a look at the how easy it is to install and log into SynergyMMS.

Installation:

Installing SynergyMMS on a workstation has never been easier. Simply go to <https://Launch.SynergyMMS.com> after opening Internet Explorer (IE) and enter your property id. Please contact SynergyMMS Support or your vendor for your property's ID.

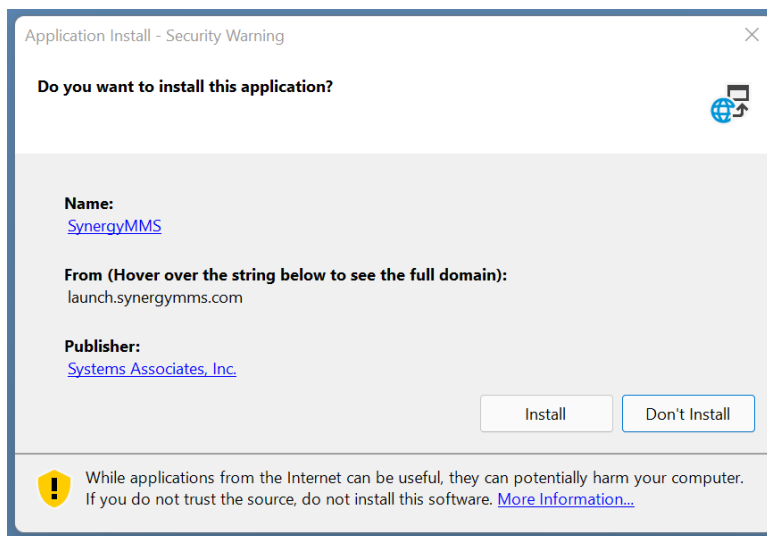
SynergyMMS is cloud based.

When SynergyMMS is launched, a connection to the server is made using Internet Explorer (IE). An IE window will open followed by the **Launching Application** window once the connection is made:



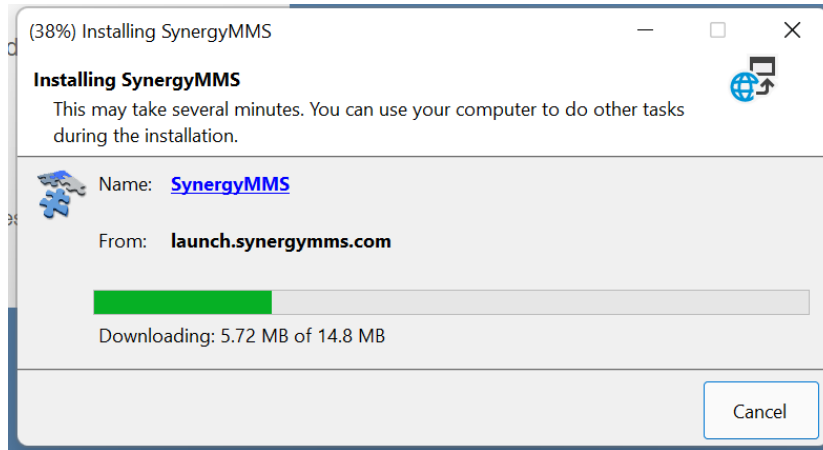
SynergyMMS *Launching Application window*

If this is the first time SynergyMMS has been launched on this workstation, you will be prompted to run the SynergyMMS installer:



SynergyMMS *Application Run window*

Once you click **Run** to begin the installation of SynergyMMS on your workstation, you will see the application downloading to your computer:



SynergyMMS Download window

Now that you have finished downloading SynergyMMS to your computer, you will be able to log into the application.

After you have installed SynergyMMS on your computer, and you login and log out of SynergyMMS, you will have a new shortcut on your desktop:



Desktop Icon

This shortcut will launch SynergyMMS when it is double-clicked.

Logging In

Using the Login Panel, you will enter your assigned Username in the **Login** field and your password in the **Password** field. Next, click the **Login** button to enter SynergyMMS. If you are not sure what your Username is, please contact the SynergyMMS administrator at your property.

Note: If your administrator has included your Employee ID in your Employee Profile, then you may type your Employee ID number into the **Login** field instead of your Username, however, your password will still be needed.

Note: SynergyMMS may bypass the Login Panel if your Username for SynergyMMS matches your computer login name.

Type
Username
or
Employee
ID number

Type
Password
here

Click here to complete
Login



Login Panel

Password Recovery

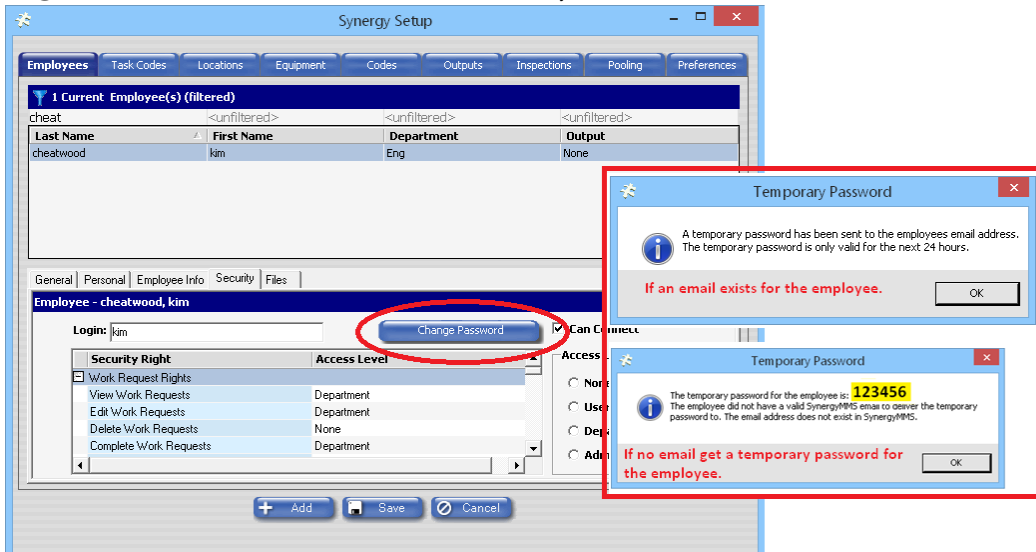
SynergyMMS offers password reset by email. Passwords are **Case Sensitive**, but Logins are not.

- You can find your login and reset your password by clicking the link, 'Forgot Login or Password,' at the bottom of the Login Screen. Then SynergyMMS will ask you for your email. A temporary password will then be sent to your email. You will use the temporary password to login to SynergyMMS, then you will be prompted to create a new password.

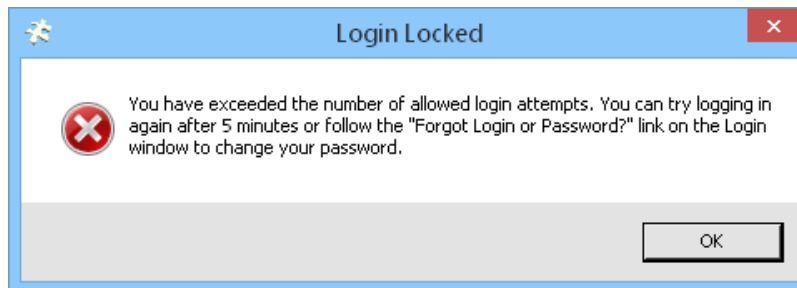


- If you do not have a password or forget your password, you can have a **SynergyMMS** Administrator provide you with a temporary password from the Employee Profile page of **SynergyMMS**.

Note: If the user does not have an email, this is the solution to use.



- If you mistype your login three times you will be locked out for 5 minutes. You can reset it using the Password Reset link.



- Do you want a more secure login process for your Brand? **SynergyMMS** offers more secure options at the brand or property level for password security. **SynergyMMS** can accommodate a set password reset time and/or several password strength requirements. Contact **SynergyMMS** Sales or Support for details.

Once you have logged into **SynergyMMS**, you are ready to explore all the program’s features from its easy-to-use navigation tool: **The MAP**.

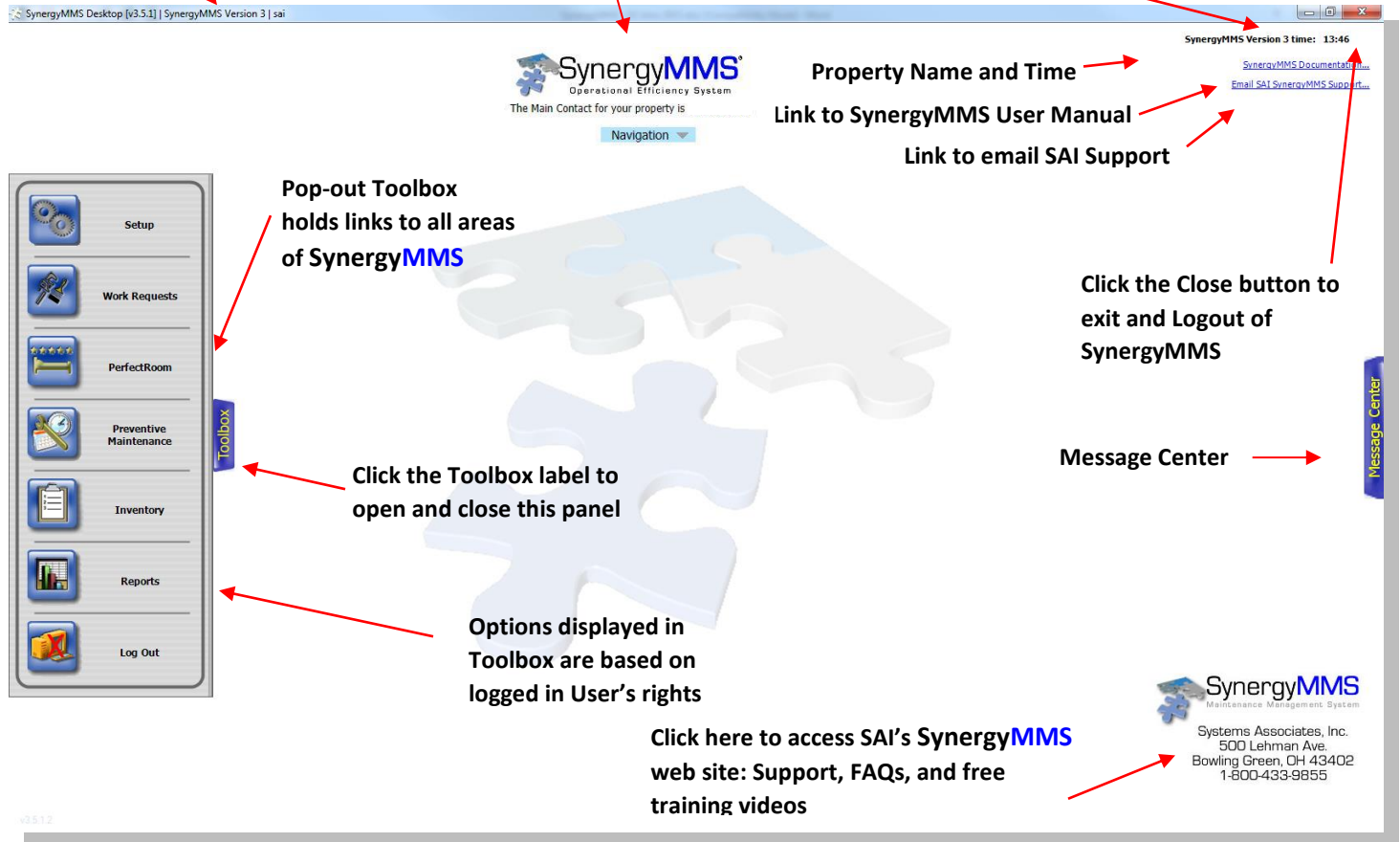
The MAP (Main Application Portal)

The MAP, with its pop-out **Toolbox**, is your navigation tool for accessing all areas of SynergyMMS.

Application name & version number, Property and Username

MAP Title Bar & Navigation menu

Control size and display of the MAP with these blue buttons



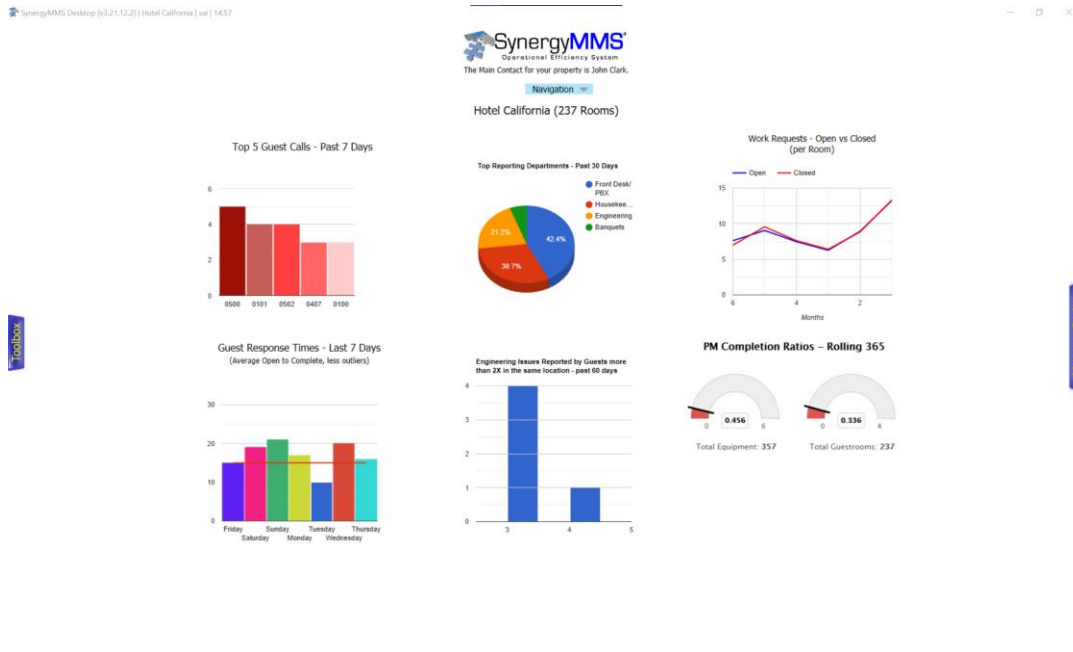
Main Application Portal (MAP)

The MAP will fill the monitor window when it first displays, but it can be resized using buttons at the right end of the MAP Title Bar. The Title Bar also displays the current version number of the SynergyMMS.

Note: The MAP Title Bar and its resizing buttons may appear in a color other than displayed above due to the Appearance Settings of your PC. The buttons will minimize and resize in the same fashion no matter what their color or appearance.

KPI Dashboard

The **KPI (Key Performance Indicator) Dashboard**, is a powerful tool used to evaluate the success of a property or activity. This snapshot of the data that was submitted into **SynergyMMS** allows administrators to easily gauge the property's performance.



Choose from multiple different statistics displayed on easy-to-read charts and graphs. The main contact for the property can edit the 6 charts/graphs that will be displayed on the **KPI Dashboard** via the drop-down Navigation Menu.

Drag and Drop images at left to select which to view in the KPI Dashboard.

Only the 6 KPI's in the red box will display in the Dashboard.

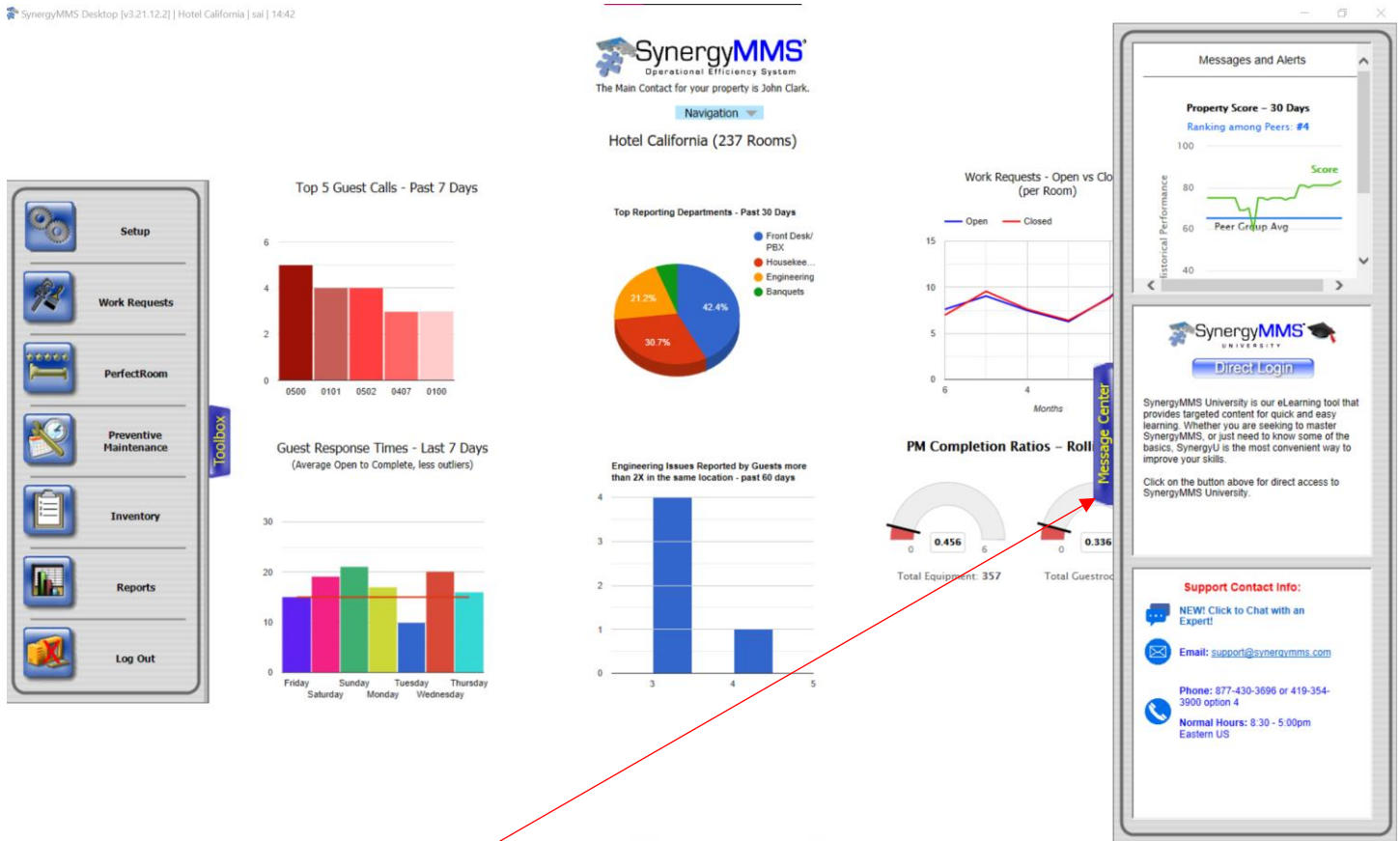
Save changes

[Return To Dashboard](#)

- **Work Requests – Open vs Closed:** Open and closed work requests monthly
- **Top 5 Guest Calls – Past 7 Days:** Most common guest call topics over the past 7 days
- **Top 5 Guest Calls – Past 30 Days:** Most common guest call topics over the past 30 days
- **Room PM Aging – Rolling 12 Months:** Number of PMs completed on-time and number of deferred PMs
- **Top Reporting Departments – Past 30 Days:** Shows which departments have been submitting the most work
- **Room PM Completion – Year to Date:** Shows how many times PMs have been completed throughout the year
- **Work Request Origins – Past 30 Days:** Shows how/through which channel issues were reported
- **Guest Calls Per Room– Past 30 Days:** Average number of guest calls per room
- **Open vs Closed Work Requests:** Open and closed work requests at a property compared to the industry average
- **Issues Reported by Guests more than two times in the same location – past 30 days:** Frequency of reported issues
- **Guest Response Times – Last 7 Days:** Average time it takes from the Work Request being entered to beginning the work on a request over the last 7 days
- **Avg. Guest Response Times – Past 6 Weeks:** Average time it takes from the Work Request being entered to beginning the work on a request over the last 6 weeks.
- **Response Times for Guest Calls– Past 6 Months:** Average time it takes from the Work Request being entered to beginning the work on a request over the last 6 months.

The Message Center

The Message Center, with its pop-out tiles, holds property statistics as well as Updates and Support information from SAI regarding SynergyMMS for your property.



The Message Center Panels

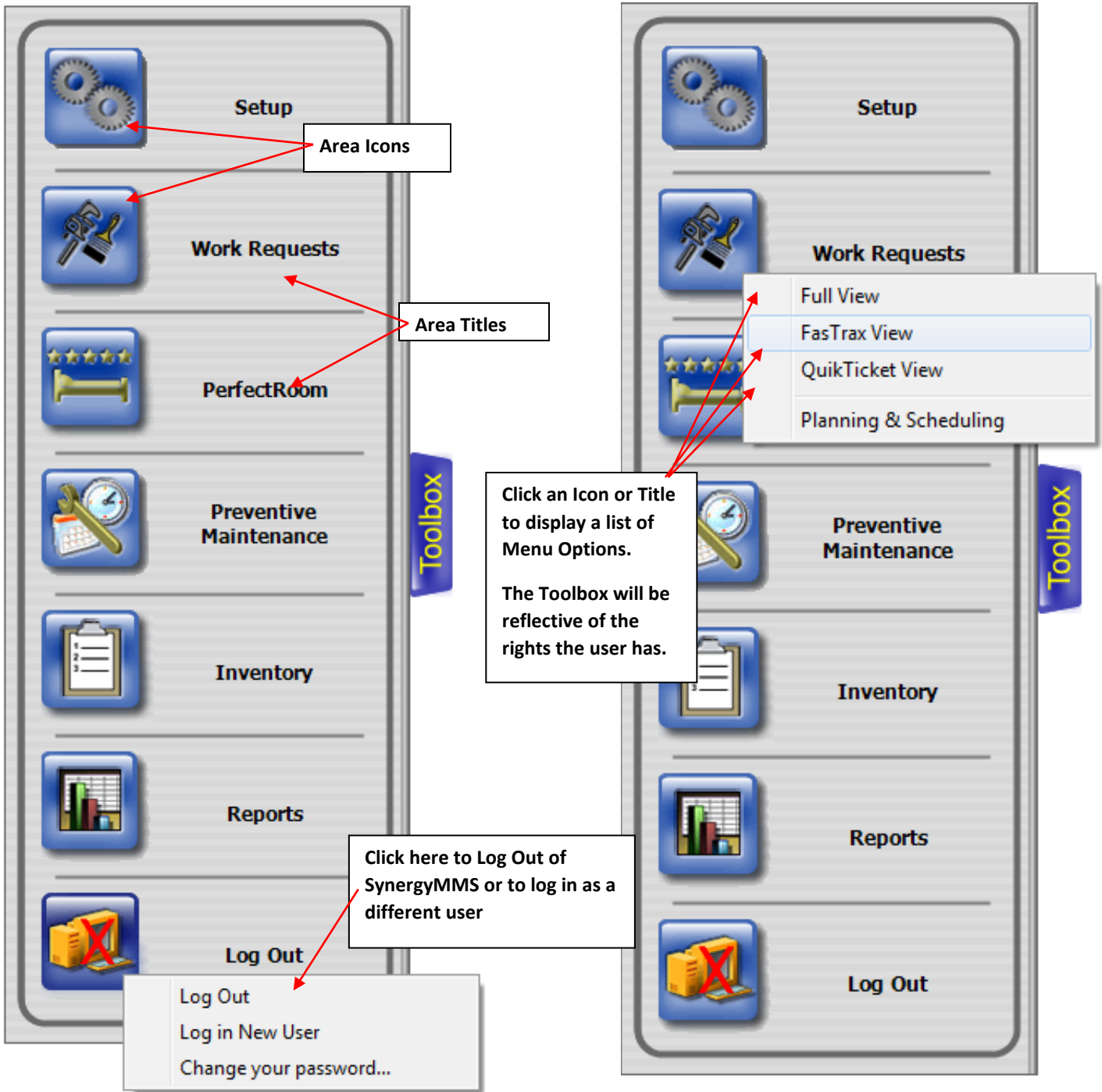
Top Panel – This panel is where SAI will communicate information like alerting users to system updates or maintenance outages. Also, you will be given your Property Score. The Property Score is a grade card on how well you are using SynergyMMS.

Middle Panel – This panel is home to SynergyMMS University. If your property has access to this add-on module, this button acts as a direct login and grants access to the comprehensive video courses. The video courses in SynergyMMS University have step-by-step instructions for the various aspects of SynergyMMS and are separated by role to make training a new employee on the system easier. If your property does not have access to this module, the button will lead to more information about what it is, please contact SynergyMMS Sales or Support to turn it on for your property.

Bottom Panel – This panel will hold information on how to contact SynergyMMS Support.

The Toolbox

The **Toolbox** is an easy navigation tool that leads to all areas of **SynergyMMS** that you have rights to use.



Toolbox Menu

Toolbox Menu w/Work Request Menu displayed

Clicking the **Logout** Icon or Title will display the following list of Menu Options: **Logout**, **Log in New User**, & **Change Password**. Use **Log in New User** to log the current user out of **SynergyMMS** and display the **SynergyMMS** Login Panel for the next user on that workstation. The **Change Password** option will redirect you to a website where you can change your password. (See the **Password Recovery** section)

Note: The areas displayed in the Toolbox are dependent upon your User Rights and **SynergyMMS** modules your property has purchased. You will only see areas to which you have been given access. The **Logout** option is available to all users.

Common SynergyMMS Display Concepts

The List Tool

Throughout **SynergyMMS** you will see lists of information. These lists, although in different areas of the program, have similar functionality. These functions are detailed below in the two sample pictures one from the Work Request area and one from the Setup / Task Codes area.

Filter – Click the filter to turn on a row above all the displayed columns. This can be used for filtering displayed information.

Print – Click the printer icon to print a list of the data shown.

Sort - Clicking any column header sorts the active list by that data, click once for ascending (A-Z), click a second time for descending (Z-A)

WR #	Location	Gst	Guest Name	Description	Status	Assigned To	Duration	DateOpened
695970	1-3474			207 SINK IS CRACKED...	✓	Hayes, KEVIN	449d 22:13	10/4/2010 1...
695972	1-3882			207 SINK IS CRACKED...	✓	Hayes, KEVIN	449d 21:12	10/4/2010 1...
695973	1-3970			207 SINK IS CRACKED...	✓	Hayes, KEVIN	449d 21:12	10/4/2010 1...
695975	1-4273			207 SINK IS CRACKED...	✓	Hayes, KEVIN	449d 21:00	10/4/2010 1...
695977	1-4383			207 SINK IS CRACKED...	✓	Hayes, KEVIN	449d 20:59	10/4/2010 1...
695978	1-4470			207 SINK IS CRACKED...	✓	Hayes, KEVIN	449d 20:58	10/4/2010 1...
695980	1-4485			207 SINK IS CRACKED...	✓	Hayes, KEVIN	449d 20:57	10/4/2010 1...
696446	3-1717	HSKP		164 BATHROOM CEILI...	✓	Perry, PAIN...	417d 22:49	10/6/2010 1...
697376	3-1862	HSKP		164 BATHROOM CEILI...	✓	Perry, PAIN...	441d 19:02	10/9/2010 1...
698633	2-1901		USHER BARB	213 WALLPAPER NEE...	⚠	Perry, PAIN...	435d 20:43	10/16/2010 ...

Type – By typing in the word you are searching for, the list will be filtered

The Work Request List

Adjustable column widths - By positioning the mouse on top of the column divider, you will be able to drag a column wider or smaller

Task Code	Category	Description	Issue Dept.	Repair Dept.
24	<unfiltered>	<unfiltered>	<unfiltered>	<unfiltered>
0124	HVAC	A/C electric heat replace contactor	None	Eng
0424	Sink	sink faucet install	None	Eng
0624	Lights	light out pool	None	Eng
0824	Telephone	telephone house phone remove	None	Eng
0924	Outlets/Switches	electrical dimmer switch replace	None	Eng
1024	Bathroom	restroom stall coat hook	None	Eng
1124	Doors/Windows	door bathroom door latch	None	Eng
1224	Doors/Windows	window sill	None	Eng

The Task Code List

Filter – Click the filter to turn on a row above all the displayed columns.

Type – By typing in the word you are searching for; the list will be filtered.

The Connections, Multi-Select tool

Within the Setup areas for Pooling, Escalation, Inspections along with Reports and Preventive Maintenance areas, we use a screen to allow users to select multiple options easily. We have detailed this below.

In this tool we can move items between the “Not Connected” and “Connected lists”

These arrows control the order items are displayed by moving the selected item up or down the list

Move – Moves selected items between lists

All – Moves all the items between lists

Chapter 2 SynergyMMS: Setup

Setup Basics

The Setup area of SynergyMMS holds the elements that make up the foundation of the application. Each of these elements is grouped into a tab of information on the Setup form. Below is the layout of the Setup Form:

Currently selected tab

Click the 'Blue Funnel' to turn on filtering

Number of records in list

Other tabs of Setup lists

Last Name	First Name	Department	Output
Able	PATTI	FIN	bbryant
admin	admin	eng	None
alicia bonnet creek	alicia	HSKP	kimemail
Allen	Tom	HSKP	None
apple	ANTOINETTE	HSKP	None
apple	AURORA	HSKP	None
apple	Juan	BELL	None

Additional Employee information grouped into tabs

Blue color shows currently sorted column

Function buttons apply to current record

Darker blue shading indicates currently selected record

Setup Editor Layout

Note: The tabs displayed at the top of the Setup are based on user rights; they may or may not display based on the rights of the user.

Function Buttons

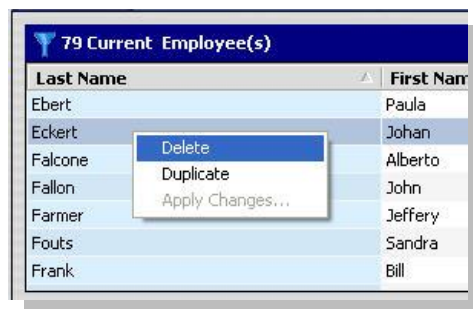
The Function buttons at the bottom of the Setup Editor give you access to frequently used features:

- **Add** – Press this button to add a new record. Pressing “Add” automatically saves the record you are on before starting a new one. This is helpful when entering large numbers of records as it allows you to move from one to the next with only one click.
- **Save** – Saves the current record on which you are working.
- **Cancel** – This will undo any changes you have made to the current record since it was last saved. When adding a new record this button clears all the fields.

Note: SynergyMMS is configurable based on corporate requirements in some cases the “Add” button is not displayed, or fields are not editable. For more information contact SAI or your vendor.

Right-Click Menu

The right-click menu allows users to access several other features if their user rights allow:



Right-Click Menu

- **Delete** – This feature allows you to remove the currently selected record(s).
- **Duplicate** – Here you can quickly copy the basic information of the selected record and use it to make a new record. This feature is disabled if you have more than one record selected. Also, the name of the item must be unique even if the underlying items are the same.
- **Apply Changes** – This option is only available in the following areas of Setup:
 - Employees
 - Task Codes
 - Locations
 - Equipment
 - Inspections

With this you can update common information in a group of selected records. *This feature is only enabled if you have more than one record selected.*

Note: To multi-select; drag and hold down the left mouse button or use the Ctrl + Shift Keys.

Note: SynergyMMS is configurable based on corporate requirements in some cases the Right-Click Menu may not allow all functions. For more information contact SAI or your vendor.

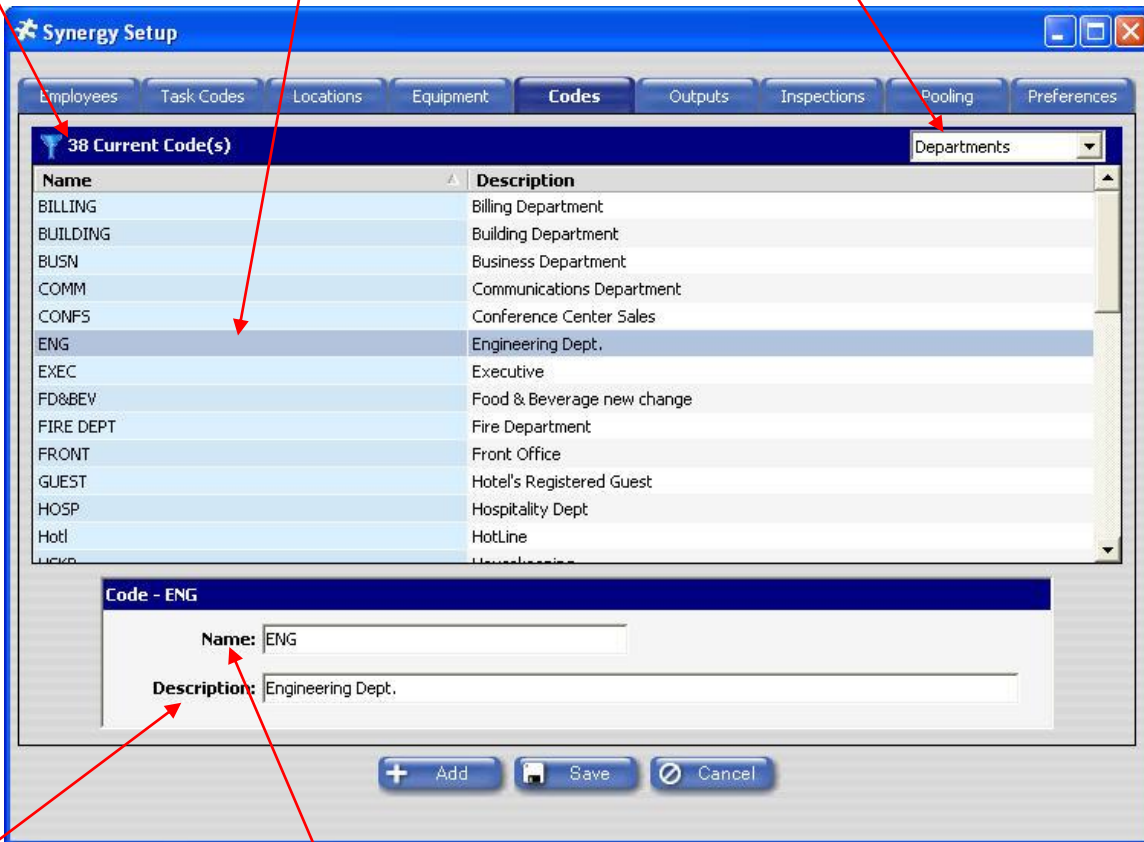
Codes

Two pieces of information are needed for each Code: “Name” and “Description.” Codes are used throughout SynergyMMS and form the building blocks from which many records in the application are created. Each of the several types of codes are available by selecting the proper Type from the drop list in the **Codes Title Bar**. The code selected in the will correspond to a drop-down menu somewhere in the program. The items listed in the grid view will be what is in that drop-down item. Each of these codes are discussed below.

Number of records in the current list

Currently selected record

Select the type of Code list here



Details form allows editing of Name and Description

Codes Tab layout

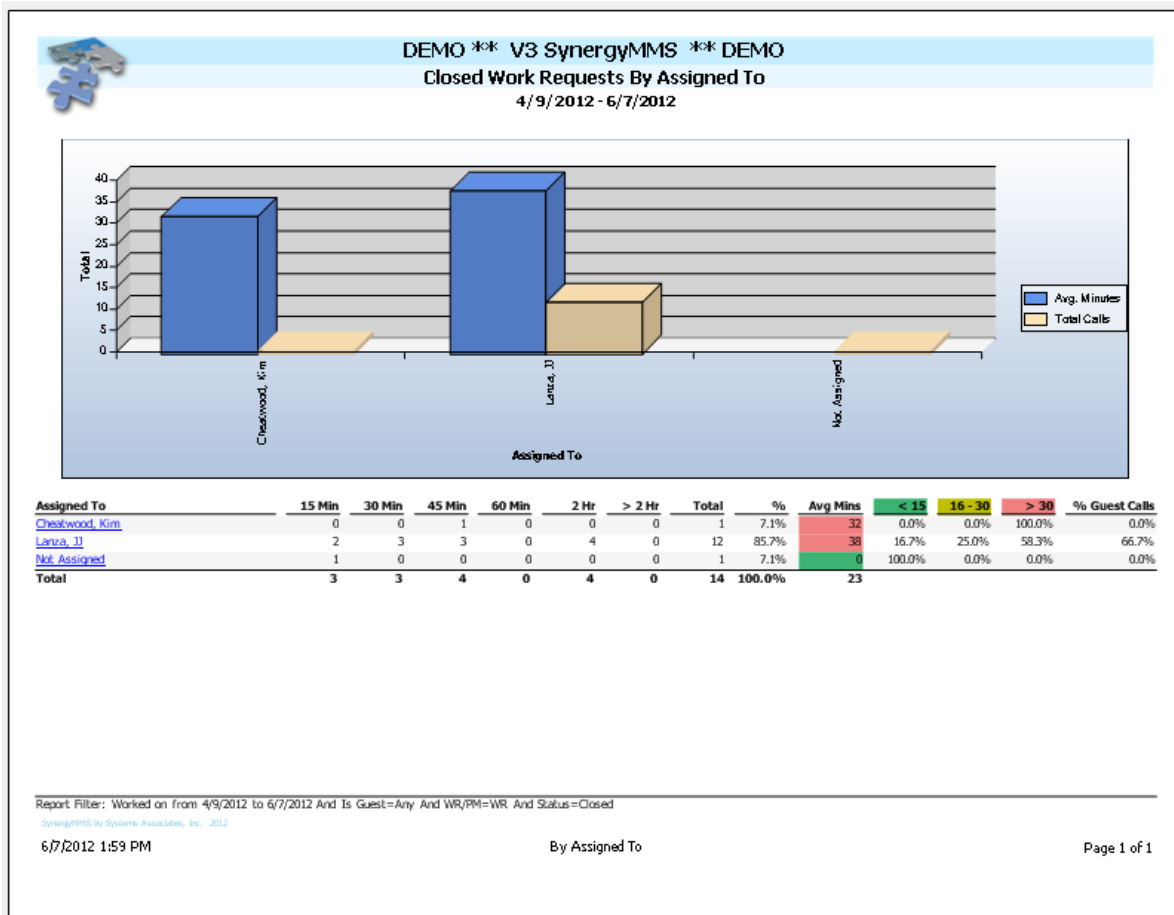
Name of currently selected record in form title bar

- **Name** – This short name is displayed in drop lists throughout SynergyMMS and can have up to 25 characters. This is the field that will display in the program and in the reports.
- **Description** – The Code’s description can have up to 100 characters.

Aging

Aging codes differ from other codes in the way the Description is written. Each Aging code is a series of five periods of time separated by a 'forward slash' (/). This allows SynergyMMS Aging Reports to display the number of Work Requests that fall into each period. For example, an Aging code can be written to count Work Requests in following periods of time: 15 minutes, 30 minutes, 45 minutes, 1 hour, and 3 hours. The Aging Report will total the number of Work Requests within these periods of time based on the length of the time it took for each Work Request to be completed. The grouping based on this example Aging code would be the number of Work Requests completed:

1. in less than 15 minutes
2. longer than 15 and less than 30 minutes
3. longer than 30 minutes and less than 45 minutes
4. longer than 45 minutes and less than one hour
5. longer than 1 hour and less than 3 hours
6. longer than 3 hours



Note: While the Description can record five timeframes within each Aging code, the Aging report displays six periods of time in total. The sixth period includes all Work Requests that took longer to complete than the fifth (last) period of time.

As noted earlier, the Description of the Aging code is written in a specific manner: each period is made up of a number and a unit of time; for example, 15 minutes. A letter, such as ‘M’ for minutes, is used to represent each unit of time. The allowable units of time are as follows:

- M = Minutes
- H = Hours
- D = Days
- W = Weeks

Note: There is no unit for Months and Years. To simulate these time periods, use the “Weeks” unit; Ex., 4 weeks for one month and 52 weeks for one year.

Example Aging Code

The forward slash (/) separates each period of time. While only the first letter of the time unit is needed in the Description, the full word or an abbreviation can be used to make the code easier to read. Each of the following examples is a valid Aging code:

- 15 minutes / 30 minutes / 45 minutes / 1 hour / 3 hours
- 15 mins / 30 mins / 45 mins / 1 hr / 3 hrs
- 15 M / 30 M / 45 M / 1 H / 3 H

Accounts

The “Accounts” tab is used for the various accounts that may receive invoices and is used in the Inventory/Costing module.

Completion Code

The Completion Code is used to record the several reasons for completing a Work Request.

Contact your SynergyMMS Vendor or Support to configure this to prompt the user during completion, closing or both.

Example: Your hotel may call the guest back after a Work Request is completed, but before the Work Request is closed. You can mark the WR using the completion code “Called Guest” for tracking that the guest has been contacted and is satisfied with the work completed.

Departments

The Department Code is used to group employees, tasks, equipment, etc. together based on how they should be grouped for easy review. This Code helps divide areas of responsibility and is important to sharing information with your team in SynergyMMS. This is also used for Pooling and Escalation grouping.

Trades

The Trades Code is used to group work by profession. This is useful when using pooling to auto-dispatch work requests. Trades are also used in reporting features to group/filter the Work Requests.

Example: Electrical, HVAC, Plumbing.

Inventory Types

This Code is used to group several types of inventory items for reporting purposes.

Equipment Types

This Code is used to group several types of equipment for reporting purposes. Equipment Types can also be useful when creating your Preventative maintenance schedules.

User Defined fields

These three fields can be used to create customized Codes. These fields default as User Defined 1, User Defined 2, and User Defined 3. These Codes can be used to represent different renovation projects or record guest compensation. They can allow for many ways of grouping of work requests for reporting purposes.

Room Type

This Code is used in the Locations list for added reporting and filtering capabilities. It represents major types of locations, such as guestrooms, corridors, public areas, and back-of-the-house locations.

Units

This Code is used for units of measure (pounds, inches, meters, liters) in the Inventory/Costing.

Loyalties

This Code is used with **PerfectRoom** (add-on module) to code the preferred guest code based on the PMS.

Time to Check-In

This Code is used with **PerfectRoom** (add-on module) to code times before check-in.

Room Layout

This Code is used with **PerfectRoom** (add-on module) to define the room layouts.

Zones

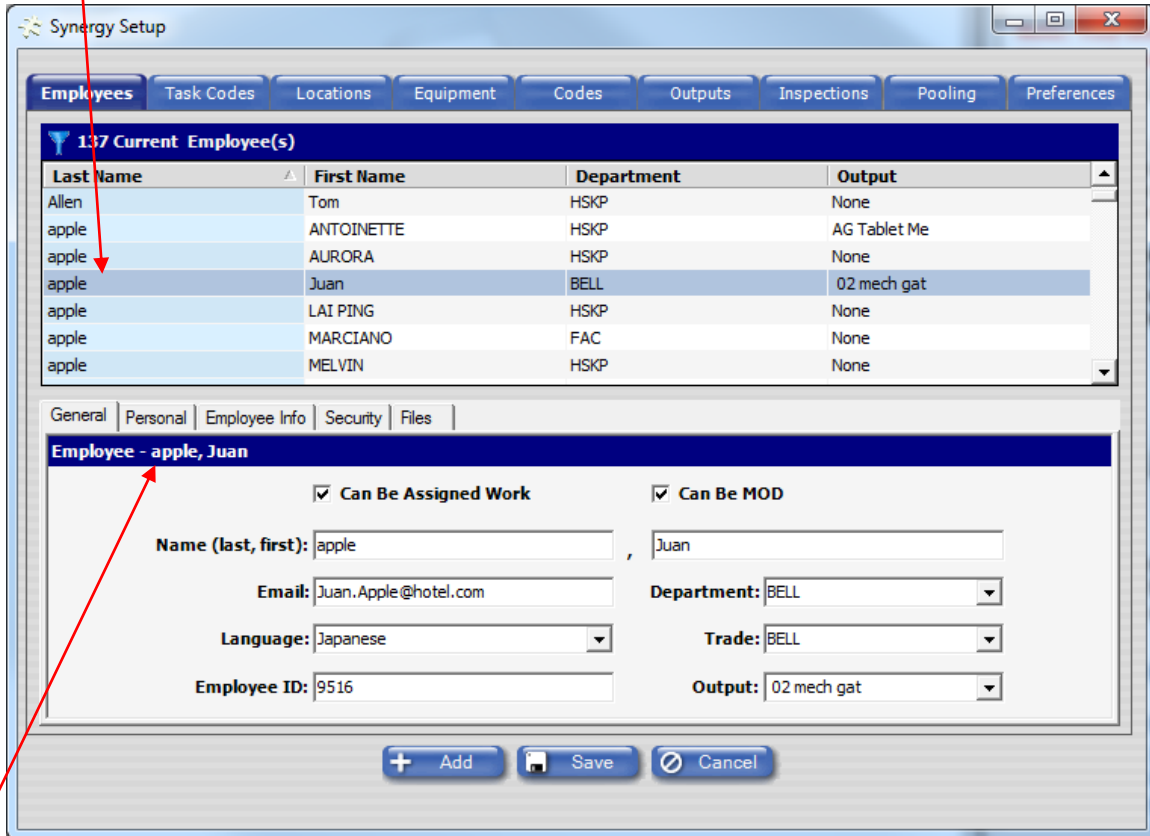
This Code is used with **PerfectRoom** (add-on module). Rooms and Employees are assigned Zones.

Employees

The Employee List is used to store information pertinent to each individual employee. Here you can add, delete, or edit employees, or simply review the list. The information in this list will be used in the Work Request, Preventive Maintenance, and Task Code areas of the program.

Note: SynergyMMS is configurable based on corporate requirements in some cases the **Add** button is not displayed, or fields are not editable. For more information contact SAI or your vendor.

Sorted by Last Name



Employee name appears on each tab

Employees with General Tab Displayed

General Tab

The General Tab holds the basic information about the employee. It has the required fields, Last and First Name, as well as the recommended field of Department.

- **Name** – The employee’s last and first name. The last name field can hold 30 characters while the first name field holds 20. The last name is a required field. (May be disabled due to corporate requirements.)
- **Email** – The employee’s email address. This address is used for Email Report Schedules. (May be disabled due to corporate requirements.)
- **Language** – The employee’s native language, used with the desktop and **SynergyMMS Enterprise Voice**. Currently supported languages for EnterpriseVoice are Arabic, Bosnian, Chinese, Creole, English, German, Greek, Japanese, French, Polish, Portuguese, Slovakian, Spanish, Russian and Tagalog.
 - Currently supported languages for the desktop are Chinese, Chinese Traditional, English, Spanish, French.
 - Currently supported languages for SynergyMobile are English, Spanish, French.
 - Currently supported languages for PerfectRoom are English, Spanish, French.
- **Employee ID** – This number is used when accessing **SynergyMMS Enterprise Voice** interface. It *must* be numbers – no letters or other characters allowed. No two employees can have the same Employee ID. This number cannot start with a zero.
 - The Employee ID can also be used as the login for the desktop and mobile interfaces.
- **Department** – The employee’s department can determine which records an employee can see and update. This field is required if a user is assigned department rights for any areas.
- **Trade** – The employee’s trade.
- **Output_** – This is the main device used by an employee to receive Work Request dispatches.
 - If an output is listed in only one employee record when that device Accepts (see Dispatching) a work request, that employee’s name will automatically be listed in the **Assigned To** field of that work request. The employee must have ‘can be assigned work’ checked for the assignment to work.
 - i **Note:** See “Claim Function” in the mobile app.
- **Can Be Assigned Work** – If checked, the employee’s name will appear in the drop list for **Assigned To** field of Work Requests; required if employee is responsible for performing tasks in Work Requests.
- **Can Be MOD** – If checked, the employee’s name will appear in the **Escalation** tab of **Pooling**. An employee set as MOD must also have an Output or must claim an output to get messages. This allows the individual to receive escalated work request dispatches from **SynergyMMS**.

Personal Tab

The Personal Tab holds the employee’s personal contact information. All fields on this tab are optional and provided for convenience.

The screenshot shows a software interface with a tabbed menu at the top: General, Personal, Employee Info, Security, Files. The 'Personal' tab is selected. Below the menu is a header bar for 'Employee - Farmer, Jeffery'. The form contains the following fields:

- Address:** Three stacked text boxes containing '500 Lehman Ave', 'Bowling Green, OH 43402', and an empty box.
- Phone:** A text box containing '(419) 354-3900'.
- SS Number:** An empty text box.
- Birth Date:** A dropdown menu showing '10/ 7/1972'.
- Comments:** A large text area containing 'Second shift'.

Employees Personal Tab

- **Address** – Three fields provided for the employee’s home address.
- **Phone** – This field can be used for either the employee’s home or work phone number.
- **SS Number** – The employee’s Social Security number.
- **Birth Date** – The employee’s birth date; clicking the drop list will display a calendar date selector.
- **Comments** – An area to record comments regarding the employee.

Employee Info Tab

The Employee Info Tab contains information that relates to certain aspects of Work Requests. The information stored on this tab is considered optional depending on what other aspects of SynergyMMS are in use.

The screenshot shows a software interface with a tabbed menu at the top: General, Personal, Employee Info, Security, Files. The 'Employee Info' tab is selected. Below the menu is a header bar for 'Employee - Armstrong, George'. The form contains the following fields:

- Hire Date:** A dropdown menu showing '3/16/2017'.
- Review Date:** A dropdown menu showing '3/16/2017'.
- Zone:** A dropdown menu showing 'None'.
- Regular Pay Rate:** A text box containing '\$15.00'.
- Over Time Pay Rate:** A text box containing '\$20.00'.
- Special Pay Rate:** A text box containing '\$25.00'.
- Max Hours Per Week:** A text box containing '40.00'.

Employee Info Tab

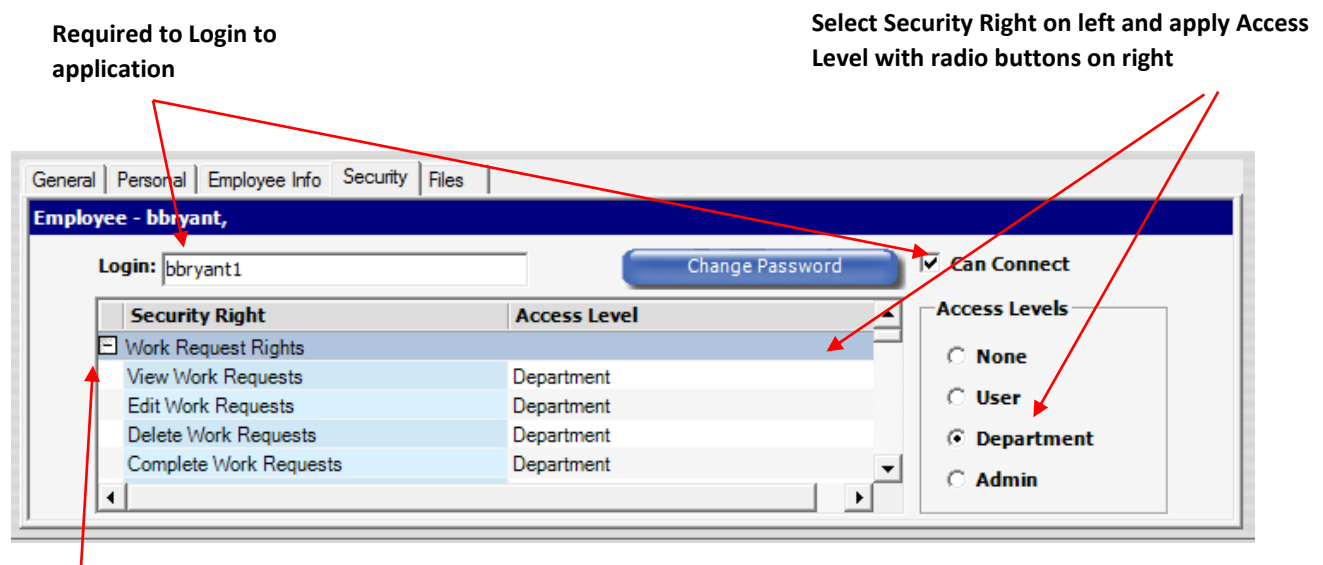
- **Hire Date** – Date employee was hired; clicking the drop list will display a calendar date selector.
- **Review Date** – Date of employee’s next performance review; clicking the drop list will display a calendar date selector.

- **Zone** – If **PerfectRoom (add-on module)** is enabled this field will show. It provides the means to assign a Zone of locations to a GRA in the **PerfectRoom** module.
- **Regular Pay Rate** – Employee’s regular hourly rate of pay.
- **Overtime Pay Rate** – Employee’s overtime hourly rate of pay.
- **Special Pay Rate** – Employee’s special hourly rate of pay.
- **Max Credits (or Max Hours in Planning and Scheduling)** - If **PerfectRoom (add-on module)** is enabled this field will show. It sets the Maximum credits of work an employee can do.

Note: The rates assigned are used in conjunction with the Costing Module of **SynergyMMS** to calculate work request cost.

Security Tab

The Security Tab is used to define the level of access the employee has to the various areas of **SynergyMMS**. The Login, Password and Can Connect fields must be completed if the employee is expected to login and use the **SynergyMMS** application. Security can be limited or allowed at the various function levels for each area of **SynergyMMS**.



Required to Login to application

Select Security Right on left and apply Access Level with radio buttons on right

Collapse or expand the Security areas like Grouping Headers

Employee Security Tab

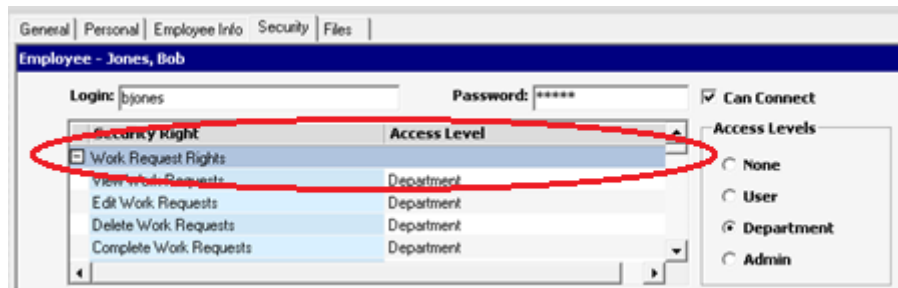
- **Login** – Employee’s login name; this is required to log into **SynergyMMS** (not case sensitive) and must be unique. (May be disabled due to corporate requirements.)
- **Password** – Employee’s password; required for logging in (is case sensitive).
- **Can Connect** – Turns an Employee’s access to **SynergyMMS** off.
 - When this box is unchecked, an Employee is not able to login. However, they do still get reports.

- **Security Right** – List of all security rights within SynergyMMS. Security rights are grouped into areas like those listed in the Toolbox. Security right groupings include Work Request, Employee Setup, PM Rights, System Setup, Inventory and PerfectRoom (add-on module).
 - ① **Note:** Security rights must be set for GRAs prior to updating the employee info Zone and Max credits. When a GRA/Supervisor user that has, Room Rush right set to User, the Room Rush button will now appear in PR mobile.
- **Access Level** – Determines which records an employee can affect with the listed feature.
 - *None* - With this access level, the employee can NOT affect records using that feature.
 - *User* - With this access level, the employee can affect records for that area that have been ‘Assigned To’ or ‘Issued By’ that employee.
 - *Department* - With an access level of “Department,” the user can affect records for that area that have been ‘Assigned To’ or ‘Issued By’ the Department of the person logged in.
 - *Admin* - With an access level of “Admin,” the user can affect records for that area that have been ‘Assigned To’ or Issued By anyone regardless of Department.

Security Rights can be set by one of the two following methods:

To assign the same Access Level to all Security Rights in one area of SynergyMMS:

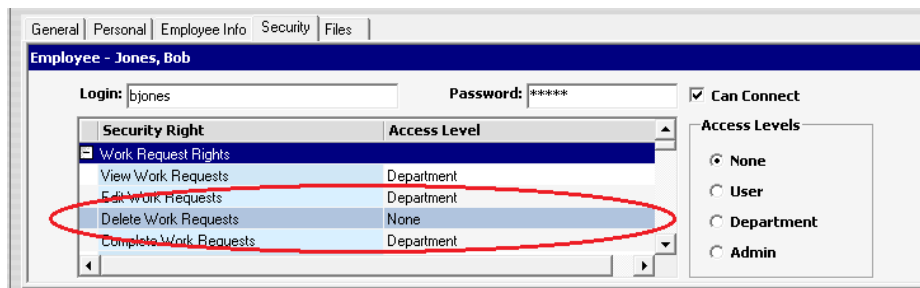
1. Click the Security Right Grouping Header



2. Click the radio button of the desired Access Level

To assign an Access Level to one Security Right:

1. Click the Security Right



2. Click the radio button of the desired Access Level

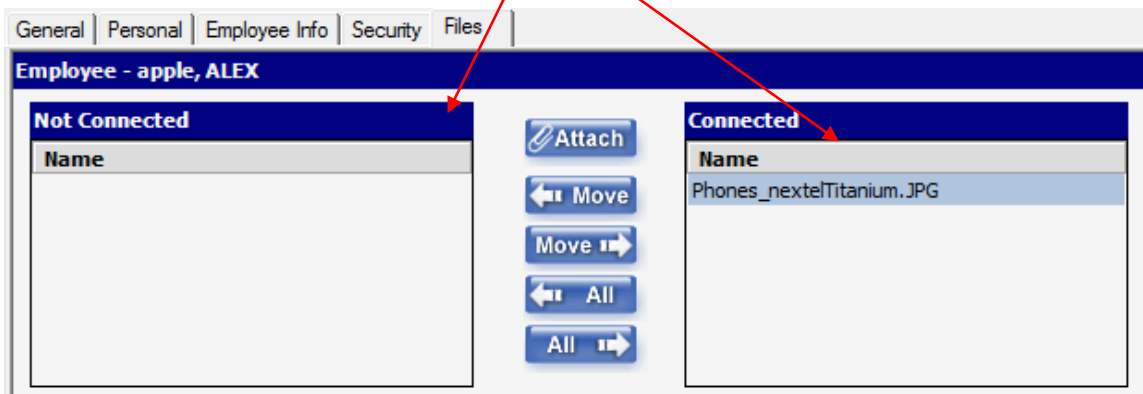
- ① **Note:** Employee Login name and Employee ID must be unique among all employees listed in SynergyMMS.
- ① **Note:** If Login name matches user's network or desktop login name then SynergyMMS will bypass the login screen and launch the MAP directly.
- ① **Note:** Most users will need to at least have user rights to Work Request.
- ① **Note:** Employees with Complete and Close rights for Work Request must also have View and Edit rights.
- ① **Note:** Employee View Details right, allows user to see the other tabs (Personal, Employee info, Security, Files and PerfectRoom) for the selected employee.
- ① **Note:** If an Employee's rights for work request reports is removed or can connect is unchecked and that employee had reports setup to email, they will no longer be sent.
- ① **Note:** If an Employee has override pooling and is using Enterprise Voice to create a WR where the Task code has a predefined output, the WR will go to the output not the Pool.
- ① **Note:** All areas where a login is required follow the employee's rights. Example: SynergyMMS Enterprise Voice, and mobile apps.
- ① **Note:** In PerfectRoom, an employee should not be a GRA and Supervisor. They should only have rights set for one of these.

Files Tab

The Files tab allows you to connect specific files such as manuals or pictures to an employee in SynergyMMS.

- ① **Note:** Attached files are limited by default to 16M per file. Any type of file can be attached. There is no limit to the number of files you can connect to a given item.

You can connect already uploaded files and move them to the Connected list.



- ① **Note:** Deleted Employees are removed from all reports automatically when you delete them

Equipment

The Equipment List stores pertinent information about Equipment in your facility. These items are stored in the program for use in Work Request and Preventive Maintenance Schedules. This area also provides easy access to considerable information that can be collected on each piece of Equipment.

The screenshot shows the Synergy Setup application window. The 'Equipment' tab is selected, displaying a list of 71 pieces of equipment. Below the list, the 'General' tab is active for the selected equipment, '10102 equip1'. The form fields are as follows:

Name	Department	Location	Type
10102 equip1	None	10102	None
10102 equip2	None	10102	None
ARIENS WAW34 #1	MAIN	OC Cart Barn	None
BLUEBIRD AERATOR #1	MAIN	OC Cart Barn	None
BOILER BWH-1(LAUNDRY)	MAIN	OC Laundry Work Area	None
CHAR BROILER	MAIN	CH Bistro Kitchen	None
CIRCULATING PUMP #A/9	MAIN	None	None
CIRCULATING PUMP #11	MAIN	None	None

Equipment - 10102 equip1	
Name:	10102 equip1
Manufacturer:	
Model:	
Serial:	
Date Installed:	2/15/2017
Warranty Date:	2/15/2017
Department:	None
Location:	10102
Type:	None
CIQ Alias:	
Useful Life:	0
Voice Num:	0
Barcode:	

Equipment with General Tab

General Tab

The General Tab holds the basic information regarding a piece of Equipment. The only required field for this tab is Equipment Name. All other fields are optional and provided for convenience.

- **Name** – Equipment name; must be unique within **SynergyMMS**, required field.
- **Manufacturer** – Equipment’s manufacturer.
- **Model** – Equipment’s model.
- **Serial** – Equipment’s serial number.
- **Date Installed** – Date equipment was installed, click drop list to display date selector.
- **Warranty Date** – Date equipment warranty expires, click drop list to display date selector.
- **Department** – Department responsible for maintaining selected equipment.
- **Voice Number** – Equipment ID for **Enterprise Voice** initiated work requests relative to a piece of equipment.

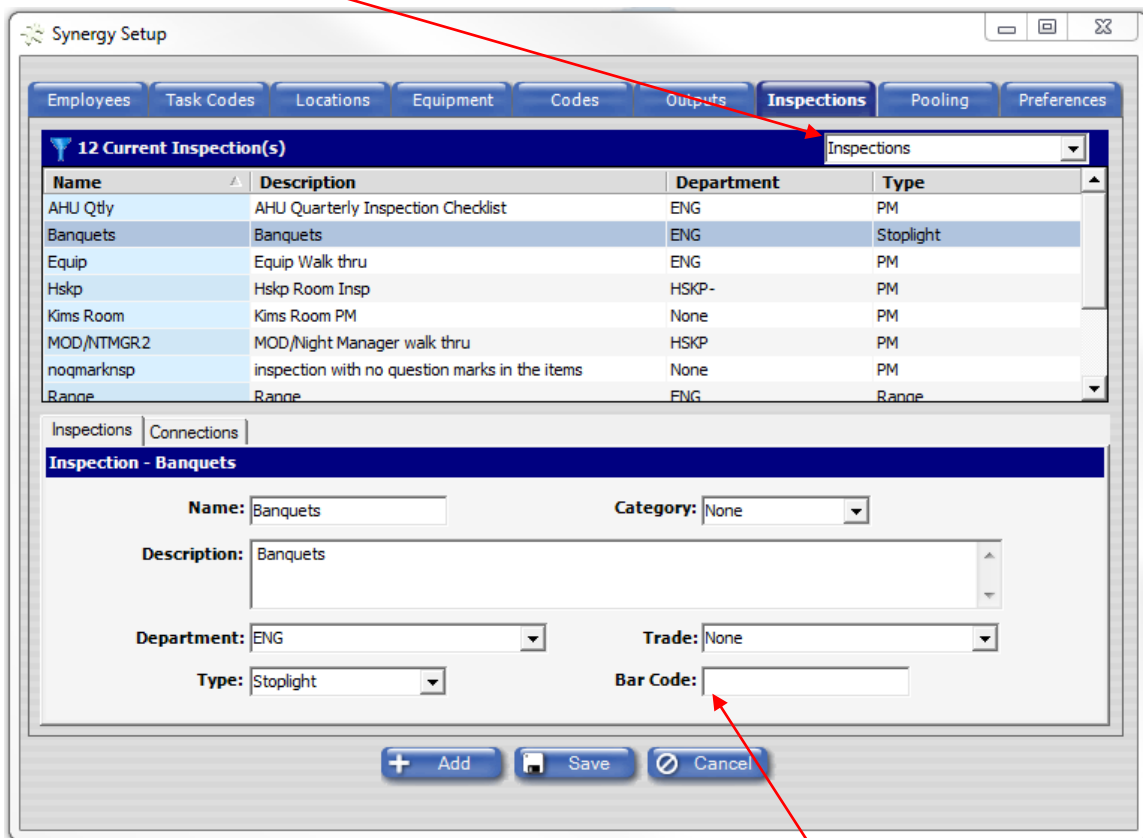
- **Location** – Location of selected equipment.
- **Type** – Equipment type, used in reporting.
- **CIQ Alias** – SAI’s Energy Management System CIQ point alias. See Index – ‘Interfacing with ControllIQ’
- **Bar Code** – Used in conjunction with the add-on Mobile Module of **SynergyMMS**. Bar Codes should be numeric for ease of use, but alpha (letters) is case sensitive. Barcodes can also be used with [Scan to Start](#)
- **Useful Life** – Number of years that the equipment is expected to last.

Inspections

The Inspections list provides users with groups of Inspection questions that can be answered using the add-on modules **SynergyMobile** (Legacy) or the apps for iOS or Android.

Note: The basic functionality of Inspections can be utilized within PM Schedules, Work Request and **PerfectRoom** (add-on module). Full functionality of Inspections requires the **SynergyMobile**, iOS or Android app add-on module.

Use the drop-down to switch between Inspections and Inspection Items



Inspections List with Inspections Tab

This field’s information depends on the Inspection Type

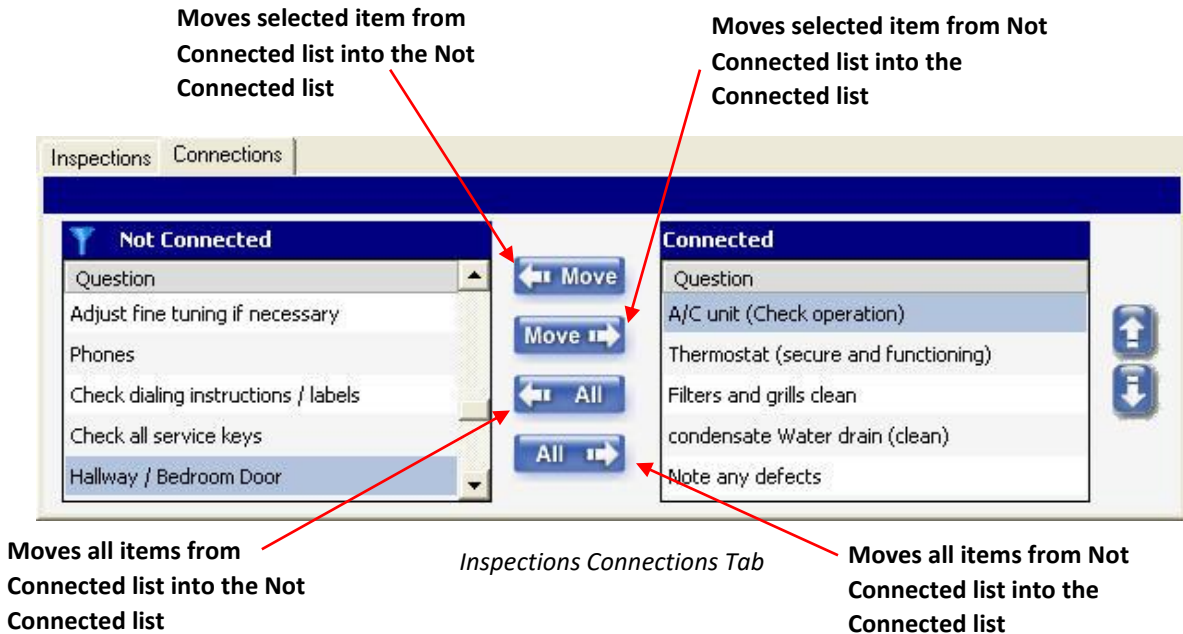
Inspections Tab

The Inspections Tab holds the basic information for the Inspections. Required fields are Name and Type.

- **Name** – Name of inspection, required field.
- **Category** – Used for filtering purposes.
- **Description** – Description of inspection.
- **Department** – Department responsible for performing inspection.
- **Type** – Inspection type:
 - **PM:** Preventative maintenance inspection checklist for rooms and/or equipment, also generate work requests for failed items
 - **Punch List/Snag:** Only inspection type that is repetitive; captures defects for renovations or new construction projects
 - Questions marked Red where a WR is created require a Defect Type.
 - Question marked Red without a WR being created will show **X** but since no WR is created no defect type is set.
 - **Score:** Each question/item is worth points
 - **Range:** Reading recordings; a work request will generate if value is out of set range
 - A Task can be included at the question level and then the created WR will use that task.
 - If no Task is included, then the WR will create with notes.
 - **Stoplight:** “Good,” “Fair,” and “Fail” options. “Fail” will create a new work request for that item
 - **GRA (PerfectRoom):** performance review inspection for GRAs awarded in percentages
- **Trade** – Trade within department responsible for performing inspection.
 - **Barcode** – Barcode number associated with selected Inspection.

Connections Tab

The Inspections Connection Tab displays the Inspection Items associated with this inspection. Inspection items are the individual questions or points that make up an Inspection. They are connected to the selected Inspection through this interface.

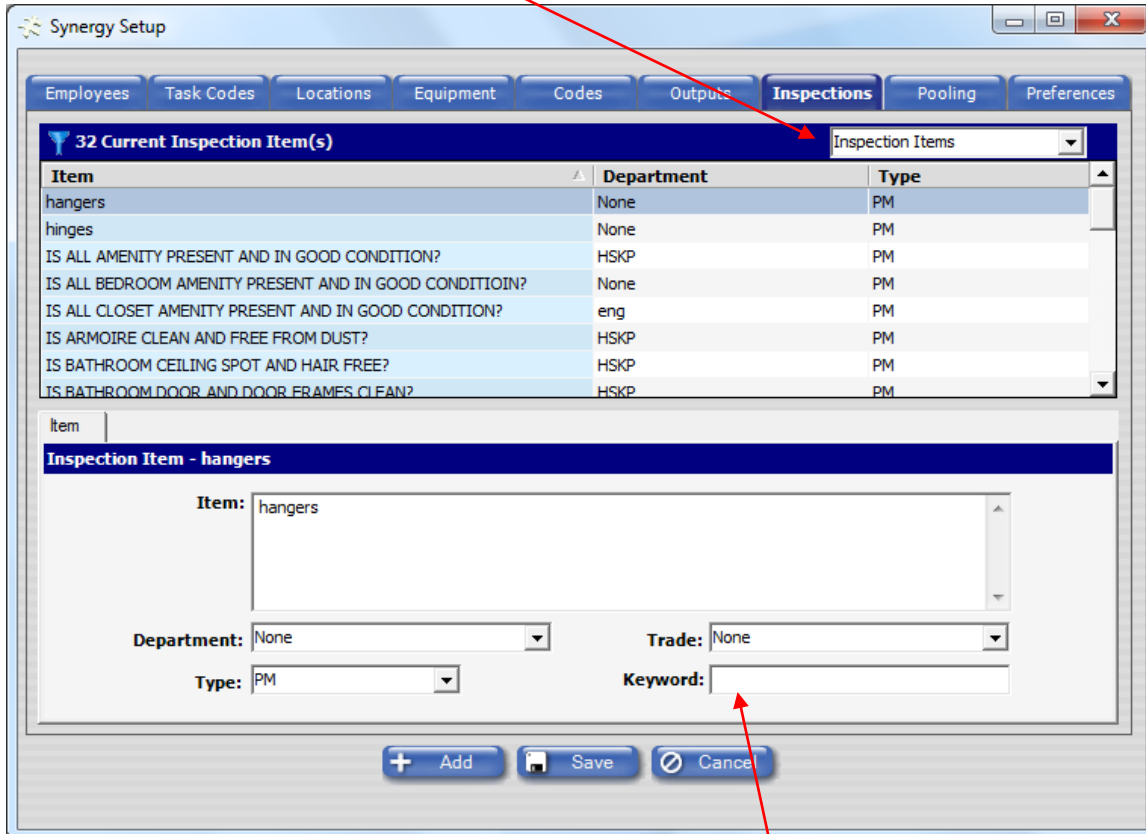


Note: Only Inspection Items of the proper type will be displayed in the Connected and Not Connected lists.

Inspection Items

The Inspection Items list allows users to input specific questions or items to be reviewed. This allows for an easy interface on the devices. As the Inspection is completed on the device, a work request may be automatically generated based on the type of inspection, each question, and the related Task Code based on Keywords. These items are collected into an Inspection using the Connection Tab discussed in the previous section.

Use drop list to switch between Inspections and Inspection Items



Inspection Items

This field's information depends on the Inspection Type

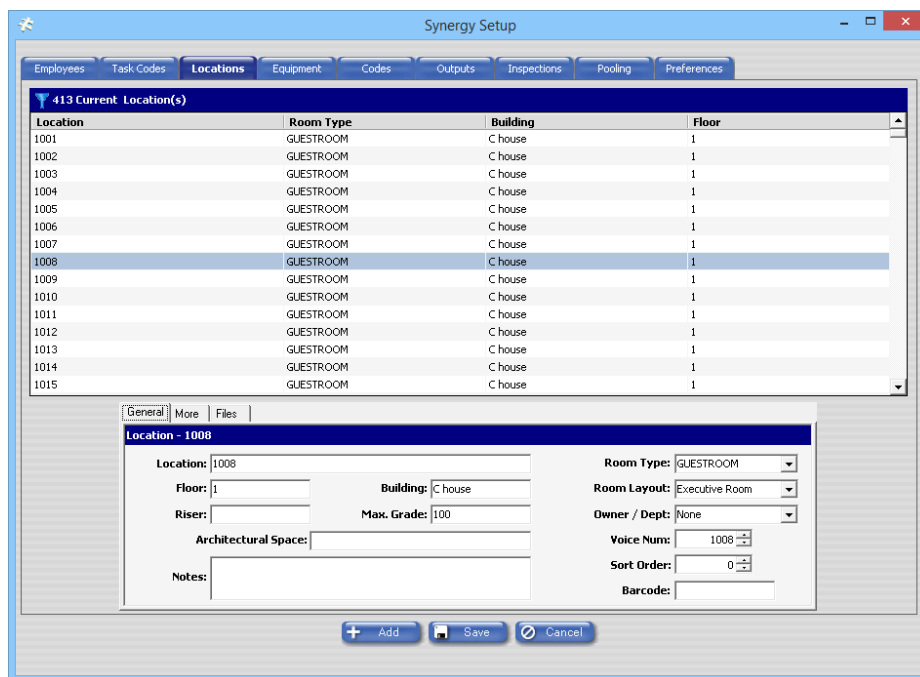
- *Item*– Description of inspection item.
- *Department*– Department responsible for performing inspection.
- *Type*– Inspection item type, required field.
- *Trade*– Trade within department responsible for performing inspection.
- *Range/Task Code*—In Range inspection items, this is where the acceptable range for a reading should be recorded. Then the task code associated with the item when the reading falls outside the range.

- **Keyword** - If the key matches a task code, then the proper task code will automatically populate into the work request created by the inspection. It can also be used to limit the list of suitable Task Codes for this Inspection Item.
- **For example:** the word 'sink' will list all Task Codes which include that word in their description. Keyword will appear for Preventive Maintenance (PM), Snagging, and Stoplight type Inspection Items.

Locations

The Locations List is used to store unique identifiers for each room or location in a facility. This list allows for easy data entry within Work Requests, Preventive Maintenance, and Equipment. Any room to be used within the Work Request, Preventive Maintenance or Equipment areas must be entered in the Locations List first.

Note: SynergyMMS is configurable based on corporate requirements in some cases the Add button is not displayed, or fields are not editable. For more information, contact SAI or your vendor.



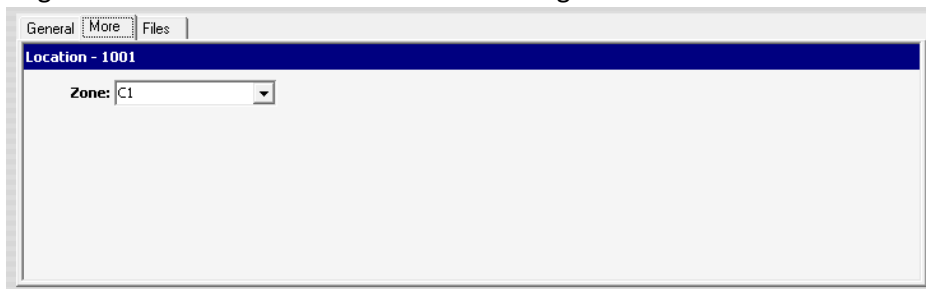
Locations

- **Location** – Location name must be unique, and the field is required, 50 Characters allowed.
 - If you will be interfaced to a PMS the room names and numbers must match.
 - Adding a preceding 0 will affect the Matrix report, so that it does not show correctly.
- **Room Type** – Location type. Defined in Setup / Codes / Room Types.
- **Floor** – Floor of the building the location is found on. Can be letters or numbers.
- **Building** – Building the location is found within.

- **Room Layout** – Style of room (**PerfectRoom**).
- **Riser** – Enter the plumbing/HVAC riser for the riser matrix report.
- **Max. Grade** – Maximum grade location can achieve, used in Room Rating report. Not a field that flows to 3rd party software.
- **Architectural_Space** – Location’s name per building drawings.
- **Owner / Dept** – Allows grouping of rooms in reports by ownership.
- **Notes** - This can be used for notes regarding this space.
- **Voice Num** – ID number used when referring to selected Location using SynergyMMS *Enterprise Voice* interface. Must be numeric, no letters or other characters.
 - SAI suggests using the phone extension for non-numeric rooms.
- **Sort Order** – Numeric order for sorting location in all drop list displays.
- **Bar Code** – Reference for use with barcode scanner used in SynergyMobile.

More Tab

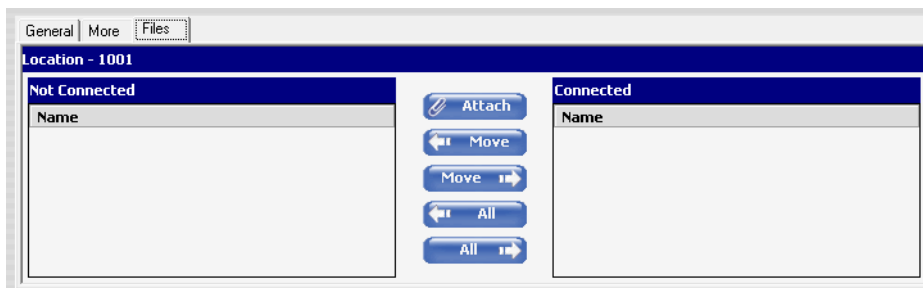
- **Zone** – If **PerfectRoom (add-on module)** is enabled this field will show. It provides the means to assign a Zone for locations so that the auto assignment calculation can run. See **PerfectRoom**



section for more details.

Files Tab

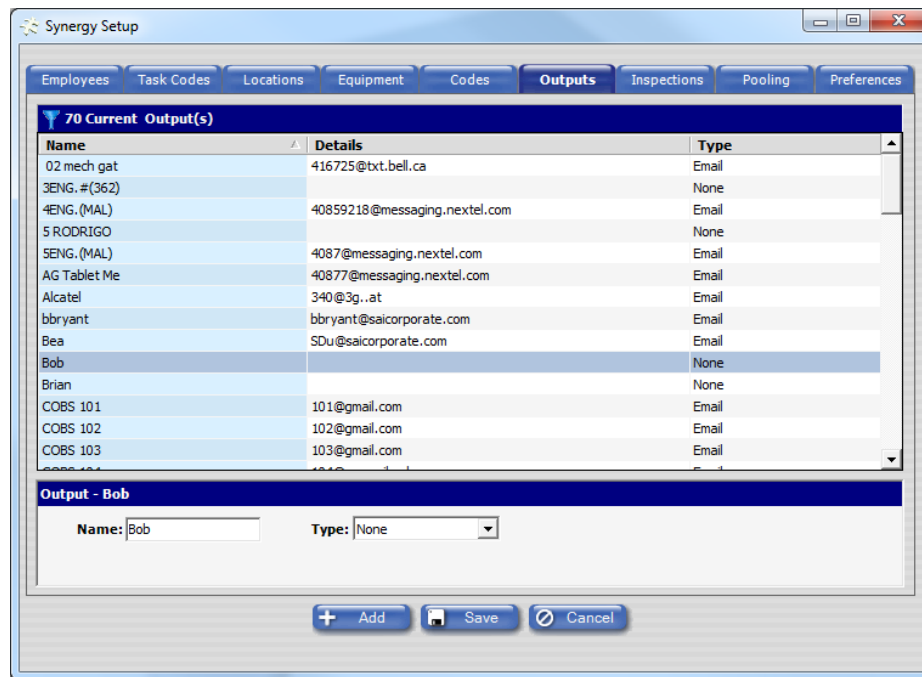
The Files tab allows you to connect specific files such as pictures of the location, to a location in SynergyMMS.



Note: Attached files are limited by default to 16M per file. Any type of file can be attached. There is no limit to the number of files you can connect to a given item.

Outputs

This List contains the Output Devices available within **SynergyMMS**. An Output Device is any device to which **SynergyMMS** can send a work request. These devices include Printers, E-mail addresses, and Push (In app notification see iOS, Android). All Output Devices entered here are available throughout **SynergyMMS**.

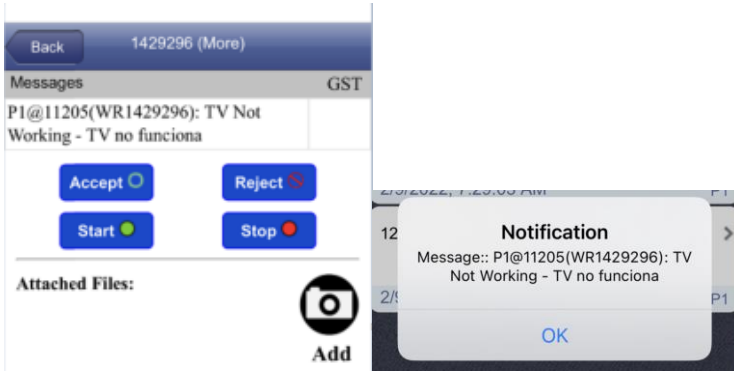


Output Devices

- **Name** – Output name, must be unique; required field.
- **Type** – Output type, required field. Additional fields may display dependent on the ‘type’ of output selected.
 - *Email* – Displays email addresses from the employees list in the Email field, or you can add an email address as needed.
 - *Printer* – If selected, printers currently installed on your workstation will display in the Printer field.
 - *Push* – Automatically created when a person logs in from an iOS or an Android device through the app.

Note: **SynergyMMS** can send a message to any device that can receive an email, or email as a text message. The reply process is different based on the provider. Some devices allow for a simple reply of 1 (accept), 2(reject) or 3(complete). **SynergyMMS** can also send a link in the message that can be used on smart phones to reply.

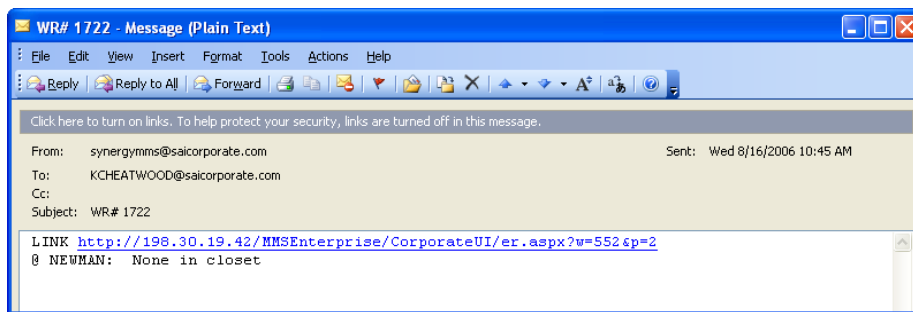
Note: **SynergyMMS** sends email and push type messages, not SMS. There are several devices and providers in the marketplace that allow for a 3rd party interface or software to translate **SynergyMMS** email into an understandable form for a device. Example of this would be certain digital radios. Contact SAI or your vendor for more details if you have a device that does not allow for email or push.



EXAMPLE DISPATCH DISPLAYED ON A PUSH-TYPE DEVICE



EXAMPLE DISPATCH DISPLAYED ON A TEXT (SMS) DEVICE



EXAMPLE DISPATCH SENT VIA EMAIL

User initiated printing

Here is an example of the basic steps SynergyMMS goes through when a user tries to Dispatch a Work Request to a printer.

1. User clicks Dispatch button and is prompted for a predefined output. (Setup / Outputs)
2. User selects predefined Output “Eng Printer” which is of a type of printer and has the long name “Engineering”
 - a. SynergyMMS looks at available printers on the workstation and if it finds a printer named “Engineering” in the Printers and Faxes setup the work request is printed.
 - b. If an exact match is not found on the workstation, then SynergyMMS looks for the closest match.

Example: A printer name “Engineering HP860” exists in the Printers and Faxes setup. SynergyMMS will print the work request to this printer because it contains the “Engineering” name.
 - c. If no default printer exists at the server, the printing process fails, and no Work request are printed.

Note: Auto Printing is currently not available in SynergyMMS.

Pooling

Pooling allows a property to completely automate the dispatch and escalation process of SynergyMMS. The difference between dispatching work requests to a specific output and letting the Pools control the dispatch is that Pools are set up with specific rules that can send to one or multiple outputs.

The goal of Pooling is to automate all sizes of properties and how they need to disperse and escalate work without having to think through the process or know who is on call currently.

Pools are a collection of business rules that determine where a work request should be sent once it is dispatched. Pools can be defined for a specific trade or departments, guest or non-guest work, specific time of day, and day of week, as well as defined locations or areas of the property.

See [Preferences](#) for turning Pooling and Escalation on.

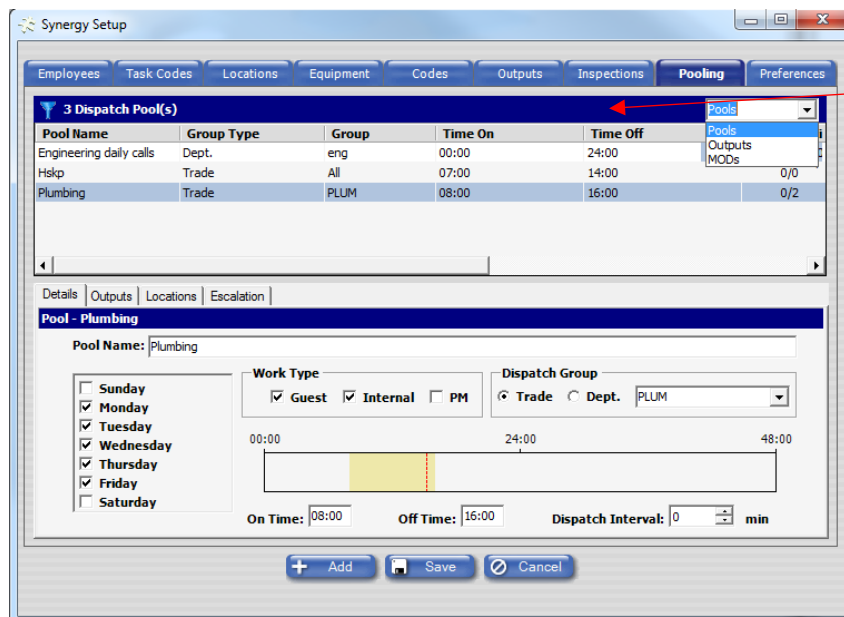
Pooling is a powerful part of SynergyMMS.

Pooling encompasses:

- Days, times to be active.
- Type of WR to be included Guest, Non-Guest, PM.

Note: PM’s generated using PM on Demand do follow the pooling rules.

- Evaluation of the Trade Pool and the Department Pools.
- Users can override a pool to force the WR to go to a specific device.
- “Claim” / “Un-claim” allows users to activate or deactivate the device that is defined in the pool.
- Logging into the app “Claims,” Logging out “Un-claims”
- Email process (See **How to Claim via Email**)
 - Escalation is also defined in a Pool and can be tiered based on the needs and wants of a property.



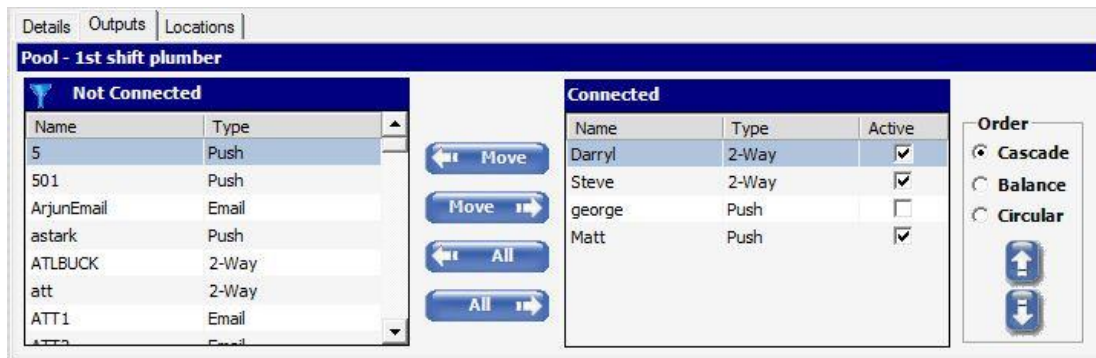
Show Pools by Pool name, Output and MOD for escalation.

Allows users to easily see where an output is or the pools in which it is included.

Pool Details Tab

In the image above, the 'Plumbing' Pool is defined to dispatch to the appropriate outputs any work requests created in SynergyMMS from Monday through Friday, between 7:00am and 4:00pm, regardless of its status as a guest call or which has been assigned to the trade of PLUM. Pools can be defined for a specific set of circumstances.

Movement between the devices in a Pool is controlled by the time set in the Dispatch Interval field on the Detail form.



Pools Outputs Tab

There are a few ways for the Pooling to manage the distribution of work:

Cascade Mode – In this mode SynergyMMS always sends the work to the connected devices in the order they appear in the connections list. Devices in the list can be reordered by selecting one device and then moving it up or down in the list with the arrow keys on the right. Device number one gets all of the work first, and if it is rejected or SynergyMMS does not receive a reply before the Dispatch Interval, the Pooling application will send to the next device in line. This type of scenario is good for a smaller property with fewer calls or where a Lead Technician is involved.

Balance Mode – In balance mode, SynergyMMS can actually help evenly distribute the work between outputs of the pool automatically. When a work request comes into SynergyMMS, it looks up the current workload assigned to each device by calculating the ECT (Estimated Completion Time) for each work request currently accepted by that device. Once totaled, SynergyMMS then sends the work to the output of the pool with the least amount of work currently assigned. This serves to ensure the work is distributed as evenly as possible and works well in busy hotels. Dispatch Interval should be set to avoid sending to both at the same time.

Circular Mode – In this mode, SynergyMMS keeps track of who the last work request was sent to and sends the next work request to the next output on the “connected” list. This evenly distributes work based on the number of calls among employees regardless of work request acceptance. This “round-robin” style will sequence through the outputs where each person takes an equal share of work in turn.

Note: When using Circular Mode, escalation requires an MOD to be in the pool. Otherwise, messages will not be automatically dispatched.

The following option for dispatching is not recommended.

Broadcast Alerts - Pooling also allows for broadcasting work to a series of devices all at once. This is useful when dealing with particularly important or urgent issues. However broadcast alerts are not recommended for routine guest calls as this can lead to confusion making it unclear who is to do the work. Broadcasting alerts is easily accomplished by establishing the pool, assigning the criteria such as trade and schedule and then simply setting the Dispatch Interval to '0'.

Setting the dispatch interval to '0' means there is no delay between dispatching to the devices in the pool thus they will all be sent the message at the same time.

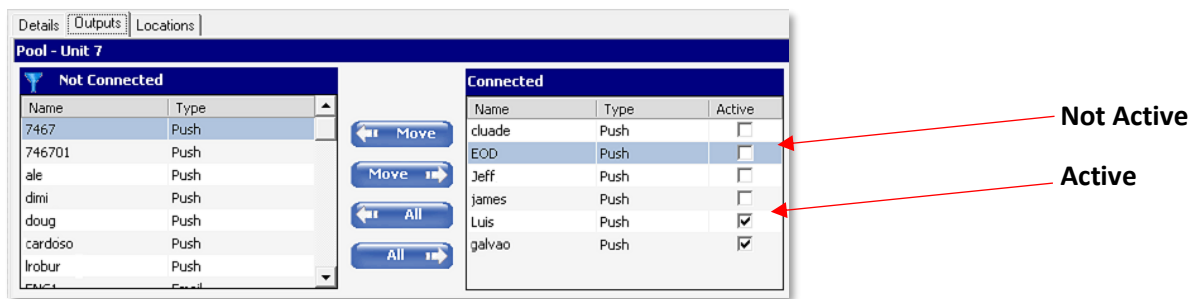
Note: Since SynergyMMS could send the message to many outputs, if an output tries to accept the work after it has already been accepted, they will get a message from SynergyMMS on their device.

Note: A dispatch can be cancelled. This stops delivery of the WR to any other outputs. This also stops the escalation. This can be done by right clicking the WR and then choosing Dispatch / Cancel Dispatch.

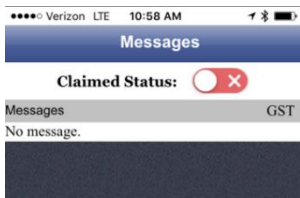
Claiming or Un-Claiming a Device

The process of Claiming or Un-Claiming a device provides a straightforward way to allow a user to activate or deactivate a device in a pool and make it theirs for the shift.

This will allow SynergyMMS to know who has a device for assignment of jobs as well as which devices are claimed and active in the pool. Notice the checkmark in the Claimed device. This also applies to MOD's and Escalation.

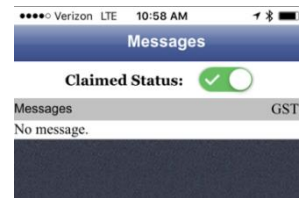


SynergyMMS allows for a couple separate ways to connect a device to a person and make it active. The preferred way is by using the app (more is detailed in the Mobile App section).



Once logged into the app, you are able to "Un-claim" yourself. This will make the device not active in the pool.

You can still force a WR to this output while it is in the not active state.



The following details the Email process for this.

The Claim / Un-claim process works from any email type device that is in SynergyMMS as an output and can send or accept email.

A special Contact email address is set up for the property by SAI. This address should then be saved on the device as a contact for easy access.

Note: If the property is in 'Pooling' mode and a device is in the unclaimed state, the work request will not be delivered to that device.

Note: Regardless of the mode SynergyMMS is in if an output is set in more than one employee's profile the work request will be delivered to the output, but when the output device accepts or completes SynergyMMS will not trigger the update of the assigned to field because the output device is not claimed by one employee only.

At the start of a team member's shift, they should Claim their device

Email process: PropertyID@synergymms.net - provided by SAI



Claiming an Output Device

How to Claim via Email

6 (space) employee number to claim a device.

For instance, employee number 12345 would send an e-mail to PropertyID@synergymms.net, it would simply say 6 12345.

When the team member is done with the shift or when they go on break or for lunch, they will send another e-mail to the same address, preceded by the number 7 (example 7 12345). This will un-claim the device. This makes it so work will not be delivered to the device.

Claim = 6 (space) employee number

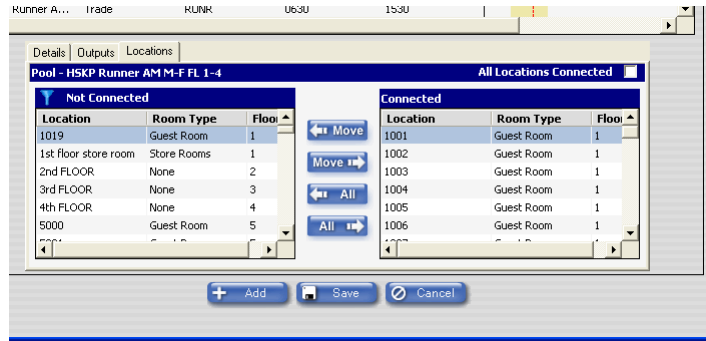
Un-claim = 7 (space) employee number

Start / Stop

Start / Stop (See Work Request area) process works in combination with the Claim / Un-claim function as a device must be claimed before it can Start or Stop recording a time on a WR.

Locations

Along with the ability to set up Pools that are for specific trades, departments, schedules, and guest/internal requests, you can also take each Pool a step further by assigning locations to a pool. This way you can have a pool that only receives work for a "Tower 1", guest rooms, or certain floors allowing staff members to focus in an area rather than waste time traveling across a large



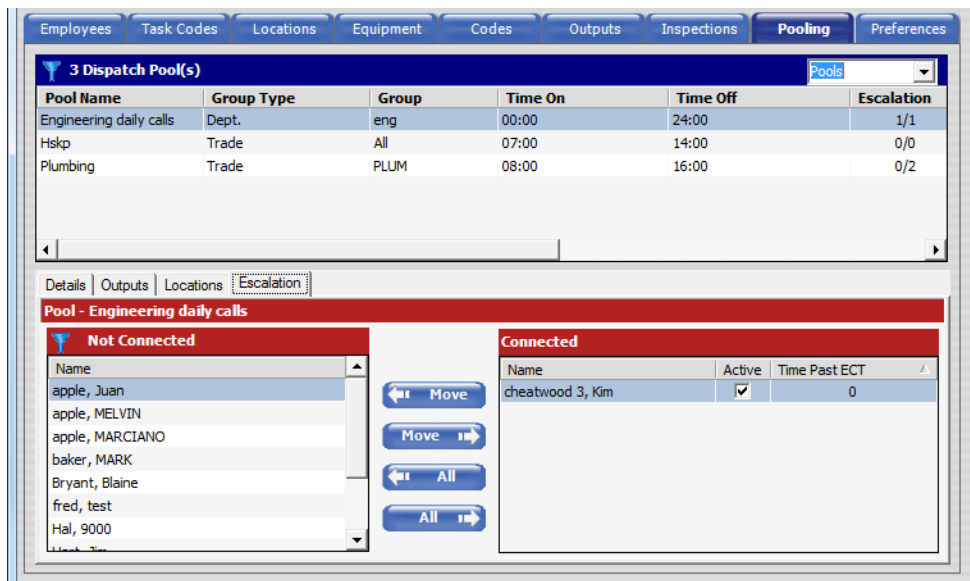
Pool Locations Tab

building or campus. Adding locations to a pool is ideal for larger properties or when certain workers are responsible for certain types of locations.

As with many of the other flexible features of SynergyMMS, Pooling is optional and must be turned on in the Preferences. This allows properties to continue to use SynergyMMS in the same manner as always with a single dedicated output, or to use the Pooling feature.

To turn on the Pooling, you need to go into the Preferences area and select the Dispatching tab (proper security rights are required to access Pooling) and set the **Dispatch To:**

Escalations



Escalation of a WR is done if enabled in the Preferences and then configured in the Pooling setup.

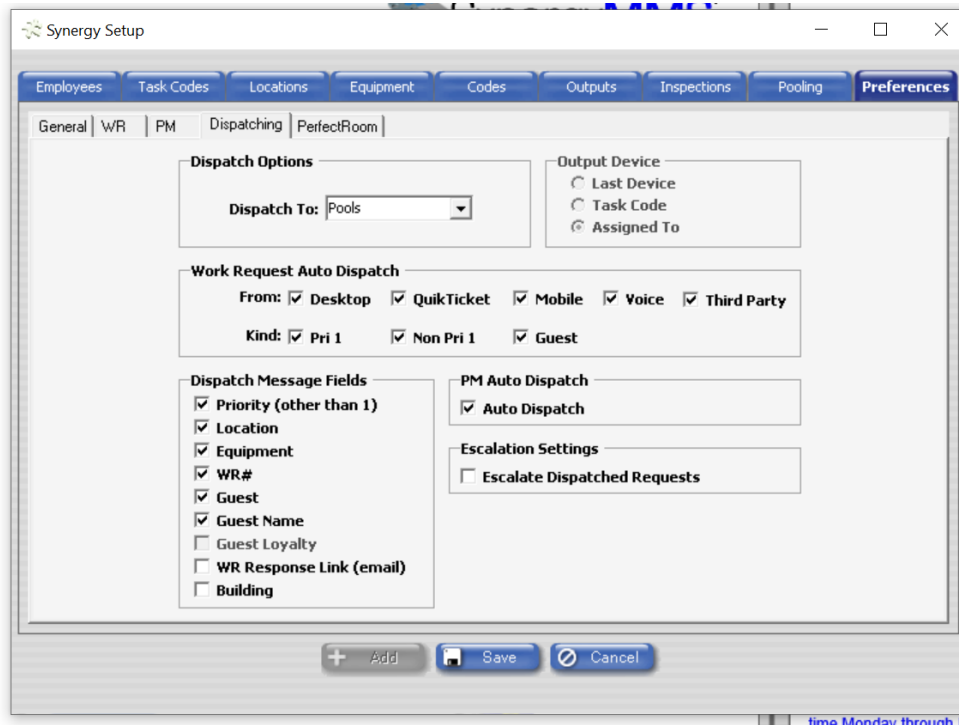
Escalation follows all rules of a pool for dispatched priority 1 WR. Only Priority 1 WR are evaluated for Escalation.

Note: Escalation can be stopped by altering the priority from 1 before the ECT expires.

When a MOD is moved or Connected to a Pool in the Escalations tab the time at which the escalation is delivered is configurable, by right clicking the MOD once connected.

Claim / Un-claim also works for MOD's to be active in the pool.

If no MOD is defined a second message will be delivered to the original recipient of the WR.



Dispatching Tab in Preferences

To automatically dispatch work requests as they are created, select the Auto Dispatch checkboxes to enable this feature based on the source of the work request.

You can pick the sources that will auto dispatch. In many cases, checking them all will be the norm, but if a property wants to customize the process, SynergyMMS allows for this.

Note: If you are in pooling mode and have auto dispatch selected for the desktop saving the work request will also force the dispatch into the appropriate Pool.

Once the work request is saved it will auto dispatch and the status icon in the Work Request list will reflect this.

At this point, if needed, the work request can be selected and dispatched again. The user will be prompted to allow the dispatch to fall into the pool or to select a specific output.

Care needs to be taken when setting up Pools. WR created outside the time of a Pool, will not go to the device until the Pool is active, and only if the WR is still within its ECT. It is also important to ensure Pools are created to account for all necessary scenarios and ensure all work is effectively managed. Fortunately, there is no limit to the number of Pools you can create, making SynergyMMS quite flexible. The Status of the work request as well as the Dispatching tab of the Work Request should be monitored to confirm dispatches are going to the expected outputs.

Due to the way Pooling changes the output process, there is an effect on the dispatch escalation in SynergyMMS.

Escalation is based on which comes first of the below:

1. The work request reaching the Estimated Completion Time (ECT).
2. The Pool's list of devices being exhausted and having nowhere else to go and the EOP (End of Pool) being reached.

If a Pool only has one output device, then escalation can happen before the normal **ECT** of the work request is reached. This type of flexibility allows a property to create the proper response action for a variety of different situations.

EOP – End of Pool is a setting in **SynergyMMS** that has a default value of 1 minute. *SAI is able to configure this if the property sees WR are escalating too soon. Contact SAI or your vendor.*

Pooling offers the ability to automate much of the dispatch process considering not only the current workload of those involved but also when and where in the building things happen. Pooling will allow your property to become more efficient with the work request process.

Detail of Dispatching

Non-Priority Time to Failure

The dispatch will fail at 4 times the estimated completion time.

Priority 1 Time to Failure

The dispatch will fail immediately upon the estimated completion time expiring.

Dispatch Listening Period After Failure

Command and Control's (A high level program SAI uses for monitoring transactions) Configurable hold-open period, which is currently 5 days, so that is the maximum period a user has to successfully respond to a dispatch. The times listed below refer to how long Synergy dispatcher business logic will continue to wait for replies.

With Start/Stop Access (via text and Mobile App):

The dispatch is held open for the greater of:

1. Two days
2. Two times the estimated completion time for priority 1 work, 8 times the estimated completion time for non-priority work.

Without Start/Stop Access (Mobile App):

Non-Priority Work

The dispatch is held open for eight times the estimated completion time after failure in total. The actual calculation is four times the ECT and then two times that result. So, for a non-priority one WR with a 15-minute ECT the failure would occur at 60-minutes, but the listening period after failure is another 120-minutes, or eight times the ECT. So, in this example the dispatch can be responded to for a total of 3 hours.

Priority 1 Work

The dispatch is held open for two times the estimated completion time.

Escalation

If Escalation is on, a property can define the details of the escalation in the Pooling section.

Escalation can be defined to go to one or more individuals and can be delayed based on the Pool setup.

If Escalation is on, but no Pools contain Escalation information, an Escalated Message will be sent to the original output or outputs.

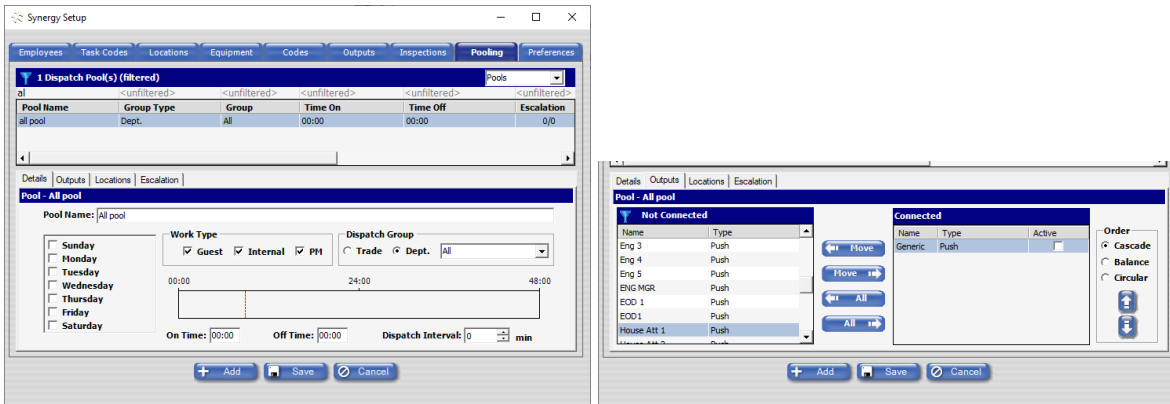
Escalated messages show with three '!' Before the actual message. Example: '!!! P1 @ Location (WR#)-GST Smith'.

Delayed Dispatch for Active pool with no Active outputs

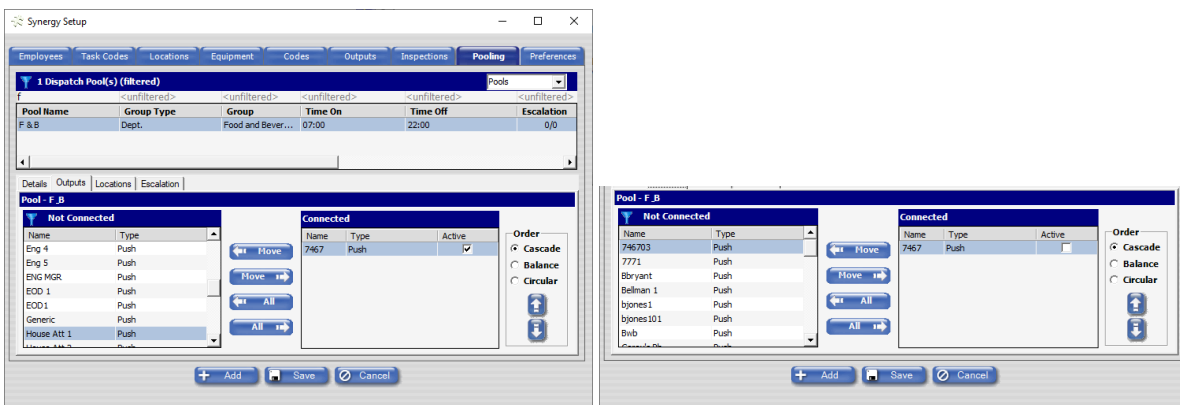
SynergyMMS offers a special case to allow a WR to sit and wait for a device to become active. To do this you need a generic pool created with the following settings. This assumes you do have valid pools for respective departments with the correct outputs in them.

1. Days of week – None selected
2. Work Type –All should be checked
3. Dept = All
4. Time = 00:00 – 00:00
5. Outputs – Add one generic not active output.
6. Locations – All

Generic Pool



Real Pool



Example: An Engineering WR created when the above pool exists. Engineering pool is live based on settings, but no active devices are present. The WR will sit in a dispatch / waiting state until someone logs in. Once the user logs in then the WR will be dispatched to the newly active outputs.

Example WR:

Hotel HealthScore
Work Request Full Detail
 1/7/2022

Work Request #: 1227
Opened: 1/7/2022 8:39 AM
Scheduled For: 1/7/2022 8:39 AM
Duration: incomplete

Task Code: 2779
Assigned To: Not Assigned
Reporting Dept: Not Assigned
Repair Dept: Food and Beverage
Location: 210
Trade: Not Assigned
Equipment: Not Assigned
Requested By:
UserDefine1: None

Guest Name: test
UserDefine2: None
Output: Pooling
UserDefine3: None
ECT: 15m
Duplicate Count: 0
Priority: 99
Grade:

Description: Retrieve Room Service Table / Tray - Retirar Mesa De Servicio A La Habitacion / Bandeja

Comments:

Completion:

Transaction History Details

Description	Employee	Detail	Date/Time
Created	SAI,	location = 210 assignedto = None taskcode = 2779 output = Pooling datescheduledfor = 1/7/2022 8:39 AM	1/7/2022 8:39:56 AM
Dispatch Queued	SAI,	output = Pooling	1/7/2022 8:39:56 AM
Dispatched	cheatwood, kim	1927b176-e8d9-459c-954e-3aed8a229c58:ios	1/7/2022 8:54:06 AM

No Costing Records Available

Preferences

The Preferences tab of Setup contains the defaults that affect the operation of the entire SynergyMMS application and all users.

The screenshot shows the Synergy Setup application window with the Preferences tab selected. The General sub-tab is active, displaying the following fields:

- Property Name:** The Quin Central Park by Hilton Club
- Main Contact:** Thorpe, Orlando
- Year Built:** 1924
- Square Footage:** (empty field)
- Default Culture:** English (United States)
- Time Zone:** (UTC-05:00) Eastern Time (L)
- Force Logout After:** 720 minutes

At the bottom of the window, there are three buttons: Add, Save, and Cancel.

Setup Preferences – General Tab

General Tab

The general Preferences are listed here:

- **Property Name** – The property’s name as it will appear on all reports
- **Main Contact** – Select the main contact person for anything regarding SynergyMMS. SAI will use this email for communications along with the Message Center for server maintenance or other updates. Only Employees listed in SynergyMMS with a valid email address are eligible contacts.
- **Year Built** – Enter the year the property was built for Corporate Report comparisons.
- **Square Footage** – Enter the square footage of the property for Corporate Report comparisons.
- **Default Culture** – Format of currency, date, and time options for display purposes.
- **Time Zone** – The time zone in which the property resides

- **Force Logout After** – This is the number of minutes the connection will set idle before automatically logging off. The maximum time allowed is 5760 / 4 days. However, an 8 – 12 hr shift is the norm with 480 – 720min. This is also used for mobile and app

The screenshot shows the 'Synergy Setup' application window with the 'Preferences' tab selected. The 'WR' sub-tab is active. The interface includes several sections:

- Duplicates Allowed:** Radio buttons for 'Yes' and 'No' (selected). A list of checkboxes includes 'Only Incomplete', 'Locations', 'Task Codes', 'Guest Name', 'Repair Trade', 'Repair Dept.', 'Assigned To', and 'Equipment'.
- Duration Time Levels:** A table for color-coding work requests based on percentage past Estimated Completion Time (ECT).

Color	Percentage past ECT
Green	0 % past ECT
Yellow	10 % past ECT
Red	20 % past ECT
- Show Duration Color on:** Checkboxes for 'Non Guest Work Request' and 'PM Work Request'.
- User Defined:** Three text input fields labeled 'UserDefine1', 'UserDefine2', and 'UserDefine3'.
- Cost:** A 'Markup' field set to 0%.
- Location/Equipment Scanning:** A checkbox for 'Scan to Start WR'.

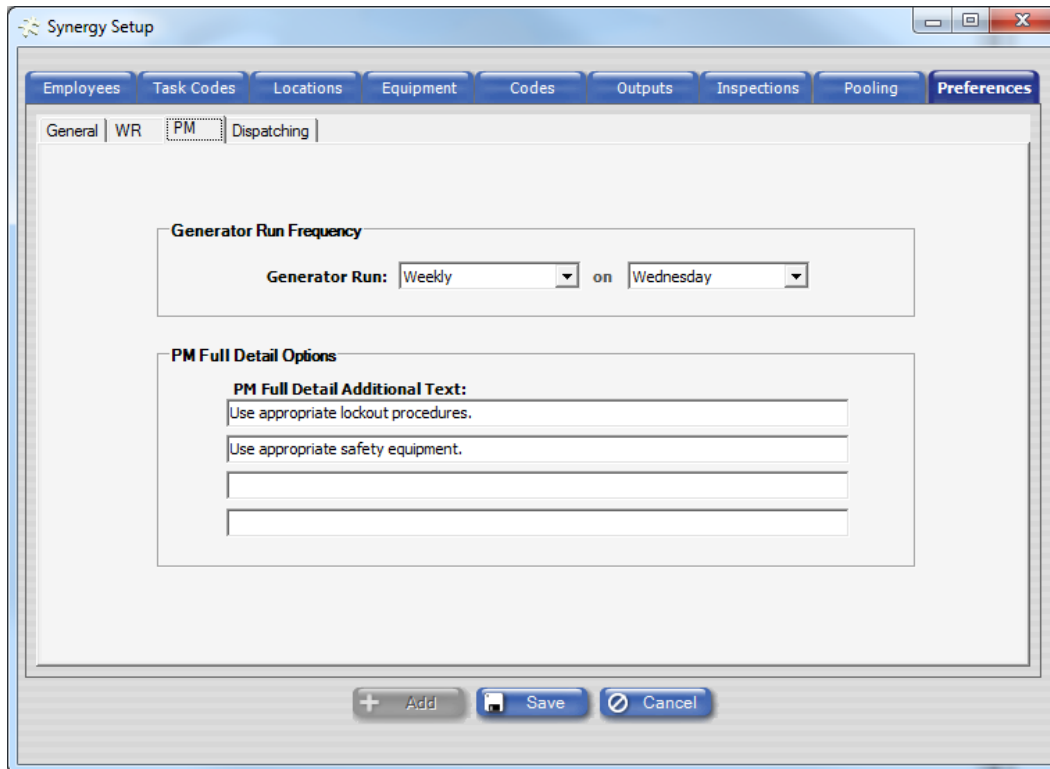
At the bottom of the window are buttons for '+ Add', 'Save', and 'Cancel'.

Setup Preferences – WR Tab

WR Tab

Preferences related to WRs are listed here:

- **Duplicates Allowed** – Turns on/off the duplicate checking feature of SynergyMMS – Criteria for duplicate checking applied using the checkboxes
- **Only Incomplete** – Sets SynergyMMS so that it does not include completed work requests when checking to see if it matches the one being added.
- **Duration Time Levels** – The default time period for color-coding of WRs. This allows the color of the work request to be more meaningful. Example: A light bulb change should have an ECT of 15 minutes, yet a tub overflowing may have a more realistic estimated time of 30 minutes. Given our setting in our sample of Yellow = 10% past and red = 20% past, a WR with 15 minutes ECT will turn yellow at 16.5 minutes and Red at 18 minutes. A WR with 30 minutes ECT will turn yellow at 33 minutes and red at 36 minutes.
- **Show Duration Colors** – Enable color coding of several types of work requests. *Guest WRs are always color coded.*
- **User Defined** – Three customizable search fields for WRs can be defined here. These fields can be an extension to the filtering and sorting already available in SynergyMMS from the department and trade. These fields set the titles for the custom fields. The lists of data are edited in the codes area of setup.
- **Cost** – Allows for a percentage mark-up over the basic cost on a work request.
- **Location/Equipment Scanning** – Check the 'Scan to Start WR' checkbox to turn on Location and Equipment barcode scanning in the mobile app to start working on a Work Request.



Set Up Preferences – PM Tab

PM Tab

Preferences related to PMs are listed here:

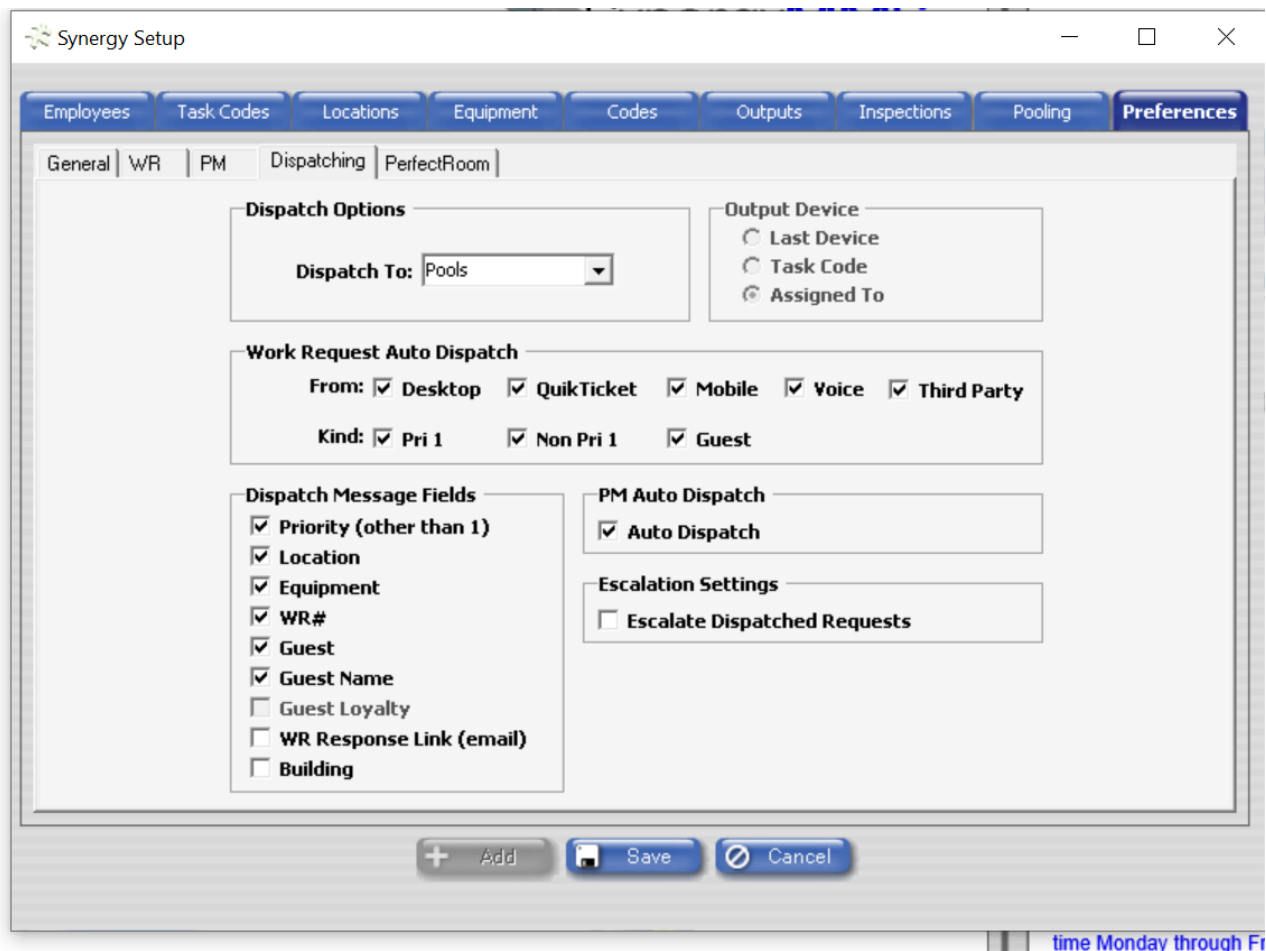
- **Generator Run Frequency** – Set how often the PMs should generate. For Weekly PMs, choose the day of the week for which it should generate.
 - PMs delivered daily means each day PM/WR will be new in the list of open Work Request.
 - The Create and Schedule for dates will be the same.
 - PMs delivered weekly means each week on the specified day, all PM/WR will display for the week. This has the advantage of allowing you to know the PM workload at the start of the week.
 - The “Create date” is when it generated. The “Schedule for” date is when it should be done, per the PM schedule Start Date, Time, and Frequency.
 - **PM Full Detail Additional Text** – Allows for adding default text that is to be displayed on all PMs when printed using the PM Full Detail report.

Dispatching Tab

Preferences related to Dispatching are listed here:

- **Dispatch To** – Select to dispatch WRs and PMs to Output Devices or Pools.
- **Auto Dispatch** –When at least one source and kind are checked, WRs created in SynergyMMS from that source and matching that kind will automatically dispatch upon saving.
- 3rd Party Interfaces are managed by using the Mobile option.

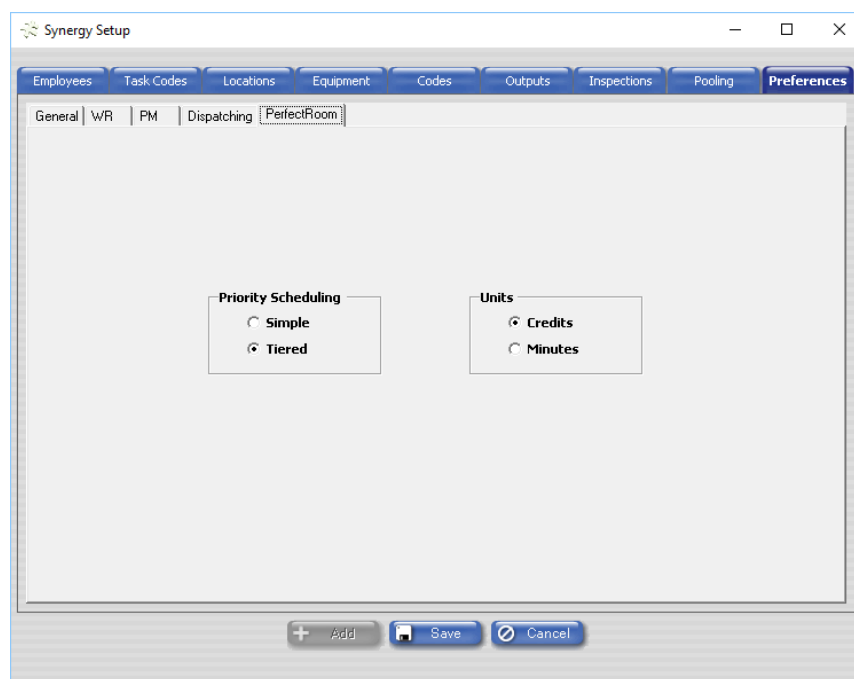
- **Escalate Dispatched Requests** – Turns on/off the escalation feature of SynergyMMS – If set to “on,” priority one work requests will be escalated to the selected manager(s) on duty (MOD) if the Work Requests are not completed within the estimated completion time. With Escalation “on,” if no MODs are defined, the output that the WR was dispatched to originally will receive a second message. See [Pooling](#) for setup of Escalation.
- **Dispatch Message Fields** – Controls what is displayed when the WR is dispatched.
- **Note:** Guest name only dispatches if the WR is marked as a Guest issue.
- **ⓘ Note:** Escalated messages show with three exclamation marks at the front of the message.



PerfectRoom Tab

Preferences related to PerfectRoom listed here:

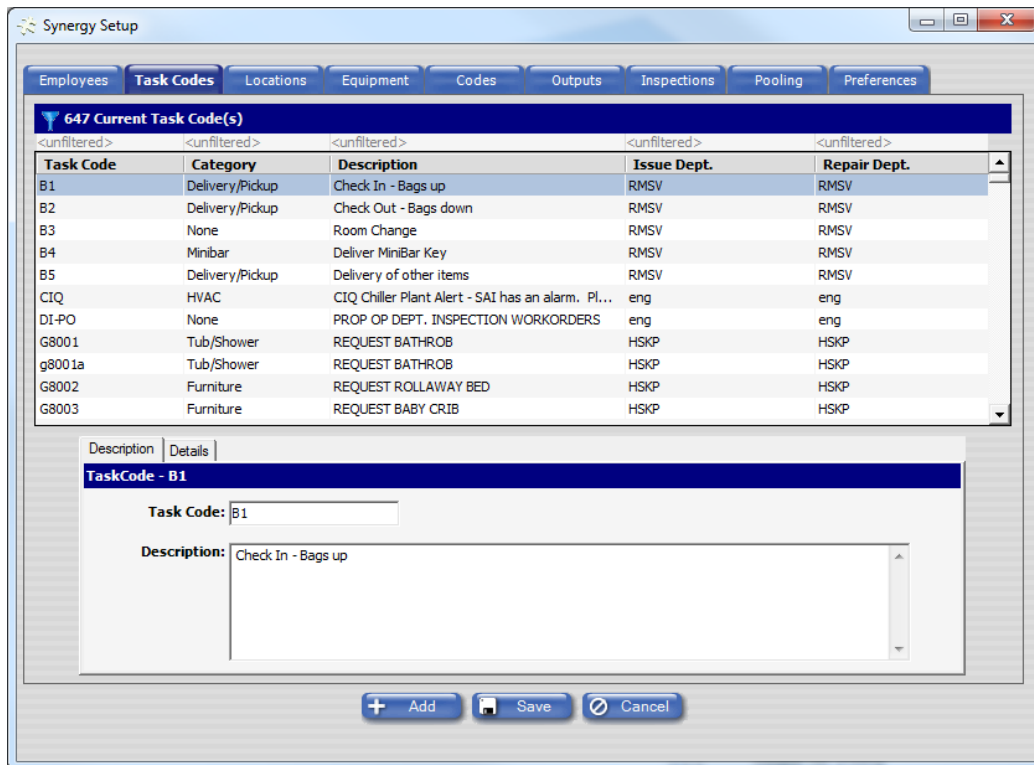
- **Priority Scheduling** – Select between the Simple Priority Scheduling or the Tiered Priority Scheduling.
 - **Note:** See PerfectRoom chapter for more details on how these will allow you to best control priority in PerfectRoom can be used.
- **Units** – Select whether your property uses credits or minutes to track your Guest Room Attendants workload.



Task Codes

The Task Codes List is used to store information such as the name, description, and details of the various tasks or deficiencies.

A Task Code allows alphanumeric codes to be defined for quick and easy entry of recurring work. For example, you may have 1004 as a code for "Television out of order". Entering 1004 in the Task Code field of the Work Request will automatically enter the description of "Television out of order". Within the setup of 1004, you will also define the Department that is responsible for remedying this problem and other information, which will automate the creation of Work Requests. This allows for quick Work Request input since all corresponding fields will automatically fill in based on the Task Code.



Task Codes with Descriptions Tab

Description Tab

The Description Tab contains the two required fields for a Task Code: Task Code and Description. These fields are displayed in Work Requests.

- **Name** – Task Code name, must be unique; required field.
- **Description** – Task Code Description, required field.

Details Tab

The Details Tab of a Task Code contains additional information which can be used to populate the corresponding fields in a Work Request.

The screenshot displays the 'Task Code Details Tab' for 'TaskCode - EPL1004'. The form contains the following fields and values:

- Repair Dept: None
- Repair Trade: None
- Category: Tub/Shower
- Issue Dept: None
- Assign To: None
- Output To: None
- Est. Time: 0 d 00: 25
- Voice Number: 0
- Linked Task: 1100-Room Makeu
- Projects: None
- Renovations: None
- Special: None
- Sort Order: 0
- Grade: 4

The 'Linked Task' dropdown menu is open, showing 'Complete' (selected) and 'Check Out' options. At the bottom of the form are three buttons: '+ Add', 'Save', and 'Cancel'.

Task Code Details Tab

- **Repair Dept** – Department responsible for performing the Task
- **Est. Time** – Estimated time to complete selected Task Code displayed in days, hours, and minutes. Also used to escalate work requests. Controls the duration color for the Work Requests.
- **Repair Trade** – Trade within department responsible for performing Task.
- **Voice Number** – ID number used to reference selected Task Code when using **SynergyMMS Enterprise Voice** interface.
- **Category** – Corporate codes for roll-up report. No user interface to adjust Categories. Categories can be used on the WR screen to filter tasks as well as a report filter.
- **Linked task** – Automatically will trigger a new work request with this linked task code upon completion or check out if interfaced to a PMS program.
 - **Example:** You may create a WR using a task code of 'fix plaster.' Once the plaster is fixed then the area needs to be painted. You would link the plaster and the paint task codes together.
- **Priority** – Priority of Task Code. The Priority field is free form 1 – 99. The priority field of the work request can be used to group or sort on the Work Request views if included in a custom view. The priority field is used on the mobile and apps to sort work. Order here is ascending.
- **Issuing Dept** – Department responsible for maintaining selected Task Code, if "None," then all Departments can use the Task Code. If this field is set, then only users with administrative rights or users that are in this department can use the task.
- **User Defined Fields** – These three fields (shown as User Defined 1, 2, and 3) are re-nameable as seen in the Preferences. They can be used to populate the Work Request User Defined fields with pre-selected key words.
- **Sort Order** – This allows the property to force an order to the task codes. If left blank the sort order is an alphabetical sort order based on the task code field.
- **Assigned To** – Employee responsible for completing Task.
- **Grade** – Number of points subtracted from Location's Max Grade for open Work Requests with current Task Code. Not passed to third party interfaces.
- **Output To** – Output Device to which Work Requests with selected Task Code will be delivered.
 - This will show Pooling if **SynergyMMS** is in Pooling mode

Chapter 3 SynergyMMS: EnterpriseVoice

SynergyMMS *Enterprise Voice* provides interaction with the SynergyMMS application via touch-tone telephones.

SynergyMMS *Enterprise Voice* allows opening, completing, closing, and reviewing of Work Requests. The advantage of this is to provide instant access from any land line.

Connection to SynergyMMS Enterprise Voice servers

SAI will provide direct non-toll numbers to our servers-

Properties in the USA, Canada, and some Caribbean properties – Are provided with an 800 number.

An extension should be set up by the property to dial the non-toll number provided. The extension must be allowed to make outside calls and rooms that are not sold.

Contact SAI or your SynergyMMS vendor for details.

EnterpriseVoice Process

To access SynergyMMS *Enterprise Voice*:

- Dial the provided extension that has been set up for SynergyMMS *Enterprise Voice*. SynergyMMS *Enterprise Voice* will answer and play the first prompt in the preferred languages set in the Preferences area of SynergyMMS.
- Users are prompted to enter their Employee ID, and then press the # key.
 - Prompts are played, based on their rights, and in the language set for the employee.
- **Press 1** to create a New Guest Initiated Work Request.
- **Press 2** to create a New Internal Work Request
- **Press 3** to complete an existing Work Request by the Work Request Number.
- **Press 4** to complete an existing Work Request using the Room Number.
- **Press 5** to close an existing Work Request by the Work Request Number.
- **Press 6** to close an existing Work Request using the Room Number.
- **Press 9** to disconnect.
- **Press #** to repeat the menu.
- Follow voice prompts to complete action.
- When finished, hang up the phone.

① **Note:** SynergyMMS *Enterprise Voice* is audible in over fourteen languages: including Arabic, Bosnian, Chinese, Creole, English, French, German, Greek, Japanese, Polish, Portuguese, Slovak, Spanish, Russian, Tagalog and others. Contact SAI for other available languages or to request a new language.

To create a New Work Request with EnterpriseVoice:

- When prompted by the main menu, **press 1** for Guest Requests or Press 2 for Internal Requests.

- When prompted, **enter Room Number**, or Equipment ID, and then **press #**.
- When prompted, **enter Task Code**, and then **press #**.
- Repeat steps #1 - #3 for each additional Work Request.
- At the end of each work request is entry, **SynergyMMS Enterprise Voice** will play back the entered request to be confirmed or canceled. The user can select a new option or hang up the phone.

To Complete or Close a Work Request using the Work Request Number:

- When prompted by the main menu, **press 3**.
- When prompted, **enter the Work Request Number**, and then **press #**
- Repeat steps #1 and #2 for each additional Work Request.
- At the end of each work request is entry, **SynergyMMS Enterprise Voice** will play back the entered request to be confirmed or canceled. The user can select a new option or hang up the phone.

To Complete or Close a Work Request using the Room Number:

- When prompted by the main menu, **press 4**.
- When prompted, **enter Room Number**, and then **press #**.
- **SynergyMMS Enterprise Voice** will list the number of open Work Requests for the current location.
- **SynergyMMS Enterprise Voice** will read the Work Request Number and Task Code of the First Work Request.
- When prompted, select an action based on the offered menu:
 - o **Press 1** to review next Work Request.
 - o **Press 2** to close current Work Request.
 - o **Press 3** to list Open Work Requests for current location.
 - o **Press 4** to select another room.
 - o **Press 9** to return to previous menu.
 - o **Press #** to repeat the menu.
- Repeat steps #1 - #5 for each additional Work Request.
- At the end of each work request is entry, **SynergyMMS Enterprise Voice** will play back the entered request to be confirmed or canceled. The user can select a new option or hang up the phone.

Chapter 4 SynergyMMS: Work Requests

Work Requests (WRs) are at the heart of **SynergyMMS**. All work, regardless of if it is reactive or planned - such as Preventive Maintenance, is viewable from the Work Request area of **SynergyMMS**.

WRs is the module most users will interact with.

SynergyMMS provides three specialized interface forms to manage WRs: QuikTicket, FasTrax and Full Views.

The Full View is our most customizable interface, allowing users to create a custom view of data and fields that they want displayed. Before jumping into the different interfaces, let us review the basics of WRs.

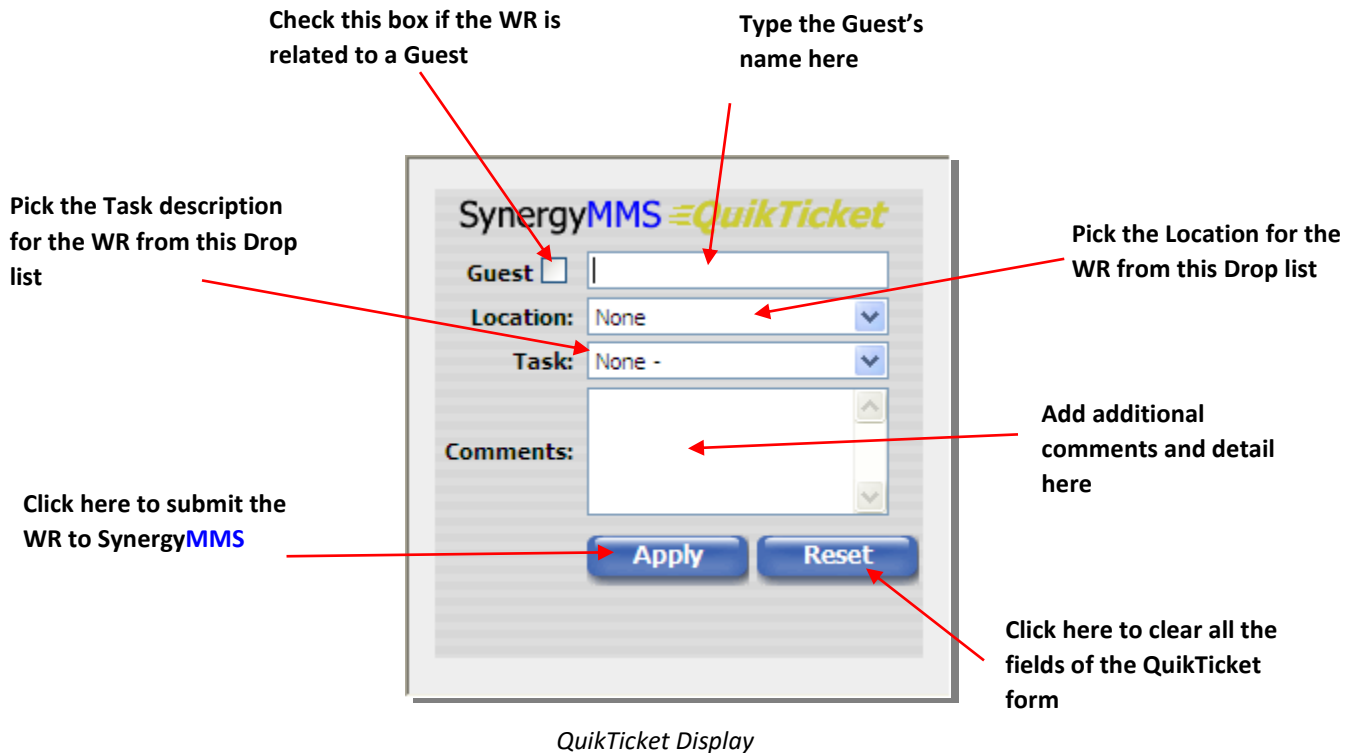
Work Request Basics

- To be valid, a WR *MUST* have a **Location**, plus a **Task Code** or **Inspection** or typed in **Comments** describing the work to be completed.
- **SynergyMMS** will automatically record the date and time the WR is created and assign a Work Request number. Users cannot edit this information.
- **SynergyMMS** will automatically record which user created the WR and their reporting Department based on the logged in user. The reported-by person is not editable.
- **SynergyMMS** will track all transactions related to each WR. This includes the actions of creating, editing, completing, deleting, closing, dispatching, and transferring WRs. This information can be viewed in the Full Detail Report. Transactions are retained for 4 months from the WR being closed.
- **SynergyMMS** will automatically record the date and time the WR is closed in addition to the user performing that action. Users cannot edit this information.
- When entering information into a WR form, please keep in mind that any field containing a downward pointing arrow in the right corner (dropdown box) will retrieve information from a pre-generated list and will not allow a user to add data on the fly.
- Once a WR is closed, it cannot be edited.
- Once a WR is closed, it cannot be reopened.
- Once a WR is deleted, it can be undeleted.
- Closed WR are retained for 3 years from their closed date. However, if they are related to a piece of equipment they are retained until 3 years from the point the equipment is removed from **SynergyMMS**.
- A Deleted WR can be viewed in the interface or on reports if needed.
- By default, a duplicate WR, based on matching Task Code and Location, is not allowed. If a duplicate request is entered, a new WR will not be created.
- However, **SynergyMMS** will record the number of times a WR is requested because of the duplication attempt and append any comments entered on this new work request to the original work request. This feature is a Property Preference and may be turned off to allow duplicates to be created. See [Preferences](#) to do this.

SynergyMMS offers many modes for WR to be added. Let us explore the options:

The QuikTicket

The QuikTicket is the most basic interface for creating WRs. This small interface will display in most internet browsers including those on smartphones.



Note: Work Request created through the QuikTicket interface will automatically dispatch if the Task Code used has a predefined Output or a valid Pool is active and QuikTicket is checked in the Preferences / Dispatching tab option.

Note: Work Request created through the QuikTicket interface will be available in other views but are dependent on users' rights.

You can access the QuikTicket from within SynergyMMS or you can setup a shortcut on the pc using the following link:

[https://\[sub_domain\].synergymms.com/SynergyWebApps/WRQuickTick.aspx?propid=\[Property_Id\]](https://[sub_domain].synergymms.com/SynergyWebApps/WRQuickTick.aspx?propid=[Property_Id])

Contact SAI or your vendor for the [sub domain] and [Property Id] portion of the URL as it will be dependent on the server your system resides.

The FasTrax View

The FasTrax View is specially designed for those users responsible for recording and dispatching Guest WRs (Front Desk, PBX, Dispatcher,). The interface is designed around the incoming calls from the guest and the dispatching of the guest's request.

The FasTrax View presents information in three distinct areas:

- Action Panel
- Progress Panel
- Detail Panels

Two additional features provide tools for working with multiple WRs: Multi-selection and the Right-click Menu.

Control size and display of this view with these buttons (points to window control buttons)

Click the Close button to close this view (points to the 'X' button)

Click here for Custom Views (points to the top-left icon)

Action Panel (points to the top table)

Progress Panel (points to the middle table)

Details Panel (points to the bottom form)

Guest Checkbox preselected for added convenience (points to the 'Guest' checkbox)

Receipt – back to WR creator when complete (points to the 'Receipt' checkbox)

Synergy displays messages to the user in red or black below the row of function buttons (points to the bottom bar)

Function buttons affect the currently selected WR displayed in the Details Panel (points to the bottom bar)

Event Type: choose whether the issue is a guest request or a defect (points to the 'Type' dropdown menu)

WR #	Gst	Location	Description	Status	Assigned To	Duration	Started On
1253...		4221	HG10000 Housekeeping Misc addtl...	⚠	Boctor,	0d 00:40	3/3/2015 2:59...
1253...		1251	SS70100 Security Misc. safe lock	⚠	Security, Dis...	0d 00:07	3/3/2015 3:32...
1253...		1251	EF20649 Grout Tub/ Shower	⚠	NotAssigned...	0d 00:05	3/3/2015 3:33...
1253...		4142	HG10001 Room Make up /asap	🕒	Katrin	0d 01:22	3/3/2015 2:16...

WR #	Gst	Location	Description	Status	Assigned To	Duration	Started On
1253...		Rhinelande...	EE20260 Power Strip In 2	↔	Pelegrinis,	0d 01:11	3/3/2015 2:27...
1253...		14 Fl	EE20201 Balast Out Of Order/ Re...	↔	Leander,	0d 00:32	3/3/2015 3:06...
1253...		1446	EE20224 Lamp Light Bulb Out bed	↔	Leander,	0d 00:11	3/3/2015 3:27...

Details - WR#: 1253877 Issued By: Daisy (FrntOffice) on 3/3/2015 8:59 AM

Location: 4221 Repair Dept: HSKP

Category: None Assigned To: Boctor

Task Code: HG10000- Housekeeping Misc Requested By: None

Guest: JOE Type: None

Comments: Housekeeping Misc -- addtl desk lamp

Receipt

None
Defect
Request

THE FASTRAX VIEW

+ Add Save Cancel Dispatch Complete Close WR

ⓘ Note: The FasTrax View Title Bar and its resizing buttons may appear in a color other than the one displayed here due to the Appearance Settings of your PC. The buttons will minimize and resize in the same fashion no matter what their color or appearance.

The Action Panel

The Action Panel is so named because it calls for the user to perform actions on outstanding WRs. WRs displayed in this panel require some user action, whether it be dispatching a WR or following up with a guest to see if the work was completed to their satisfaction.

Number of WRs needing action appears in the Title bar

Status Icons indicate whether a WR has been dispatched or completed.

Duration color indicates how long the WR has been open

WR #	Location	Gst	Guest Name	Description	Status	Assigned To	Start/Stop	Started On	Duration	Date Completed
1097	305			2736 Deliver T...		None		3/20/2021 3:3...	325d 14:32	
1098	328		Joyce Bara	2812 Requesti...		None		3/20/2021 4:1...	325d 20:48	
1125	203			400 Light Out ...		None		5/27/2021 3:5...	257d 21:07	
1127	Lobby		test	400 Light Out ...		None		6/2/2021 3:20...	251d 21:42	
1129	218			410 Light Out ...		Jones, Bob		6/2/2021 3:51...	251d 21:11	
1131	330		test	401 Light Out ...		cheatwood, kim		6/2/2021 4:11...	251d 20:51	
1133	218			413 Light Out ...		cheatwood, kim		6/2/2021 4:32...	251d 20:30	
1134	304			408 Light Out ...		cheatwood, kim		6/2/2021 4:35...	251d 20:27	
1136	400			401 Light Out ...		None		6/2/2021 4:42...	251d 20:20	
1034	205		Sarah Connor	218 Tub/Show...		Jones, Bob		8/21/2020 7:5...	32d 16:57	9/23/2020 12:55 PM
1035	204		Jane Smith	301 TV Remote...		None		8/21/2020 7:5...	209d 21:29	3/19/2021 5:28 PM
1036	220			1417 Gas Small		None		8/21/2020 8:0	209d 21:29	3/19/2021 5:28 PM

Click Funnel to choose other views.

THE ACTION PANEL

Adjustable column widths

The list of WRs displayed in this panel is sorted so that the oldest WRs that have not been dispatched () appear at the top of the list in descending order based on how long the WR has been open. The Duration column is color coded for simple reading. Green indicates WRs are still within the parameter set in Preferences, yellow means we need to contact or dispatch again depending on operations at my property. Red means that we have exceeded the estimated time. The times and colors are explained in the Task Codes area and the Preferences area where they can be set and adjusted. WRs that have been Completed () and require follow up with the guest before closing will appear at the bottom of the Action Panel list. Other Status Icons related to Dispatching include Accepted () , Declined () , Expired () , Failed () , and Escalated () . An icon also displays if a Guest () , requested the WR.

Failed () Means:

The device that the WR was dispatched to is not available. This will be displayed in the WR list shortly after the attempt to dispatch was made. The WR can be dispatched to different devices.

Expired () Means:

WRs that have been dispatched but are not completed in a timely fashion (based on the WRs Estimated Completion Time) will be marked as expired for follow-up.

- Non-Priority WR will expire at four times the ECT.

- Priority 1 WR will expire when the ECT is reached. However, if Escalation is on, then the Expired status will not show until Escalation has processed.

Note: By positioning your mouse pointer over a Status Icon, a Tool Tip will display the name of the icon. Similarly positioning your mouse pointer over a Description in either the Action or Progress Panels will display a Tool Tip with the entire text of the Description.

The Progress Panel

The Progress Panel displays all those WRs that have been successfully Dispatched (↔), or accepted. WRs shown here are still being processed by SynergyMMS. The panel is like that of the Action Panel with the addition of the ability to sort the WRs by clicking their column header.

Number of WRs in progress appears in the Title bar

The Progress Panel can be hidden by clicking this button, click it a second time to display the panel again

WR #	Location	Gst	Guest Name	Description	Status	Assigned To	Duration
1018471	26R2		higgins	2910 PR-D	↔	None	131d 22:4
1019093	32R2		mraison	1061 DELIVER ROLLAWAY(NO CHA	↔	Florence, Runne	131d 13:5
1021875	32T		NULL	2801 CURTAIN REPAIR SHEER PUL	↔	None	125d 04:3

The Progress Panel

Sort the WRs by clicking any column header, click once for ascending and twice for descending

The Details Panel

The Details Panel displays more information about the selected WR. To display a WR in the Details Panel, simply click on any WR record in either the Action or Progress Panel.

Details Title Bar displays the currently selected WR number, issuing employee and date opened

Task Code text displayed here.

Same fields as QuikTicket

Event Type allows users to mark whether it is a guest request or a defect

Assigned To fields allows users to select the employee for dispatching

Receipt- back to WR creator when complete

Type here to add comments. Double clicking the comments will enlarge the field for easier reading.

The Details Panel

The Details Panel functions like the QuikTicket form for WR creation with only slight differences:

1. Click the **Add** button, the Details Panel resets to a blank form.
2. Enter the information into each field. (Task Code is required)
3. Click the **Save** button to record the WR in **SynergyMMS**.

Note: When “Add” is clicked, users are working with a new WR record that has not yet been added to the list. During this operation, no item will appear as selected in the WR list. Once saved, the new WR will appear selected in the list.

The “Add” button also performs the Save function on the current WR allowing users to add WRs in quick succession. In this manner, no WR record will appear as selected in the list until the Save operation is performed.

Note: A WR can be completed or closed as soon as it is opened also (Quick Open/Close). Simply click “Complete” or “Close” and SynergyMMS will process the WR appropriately.

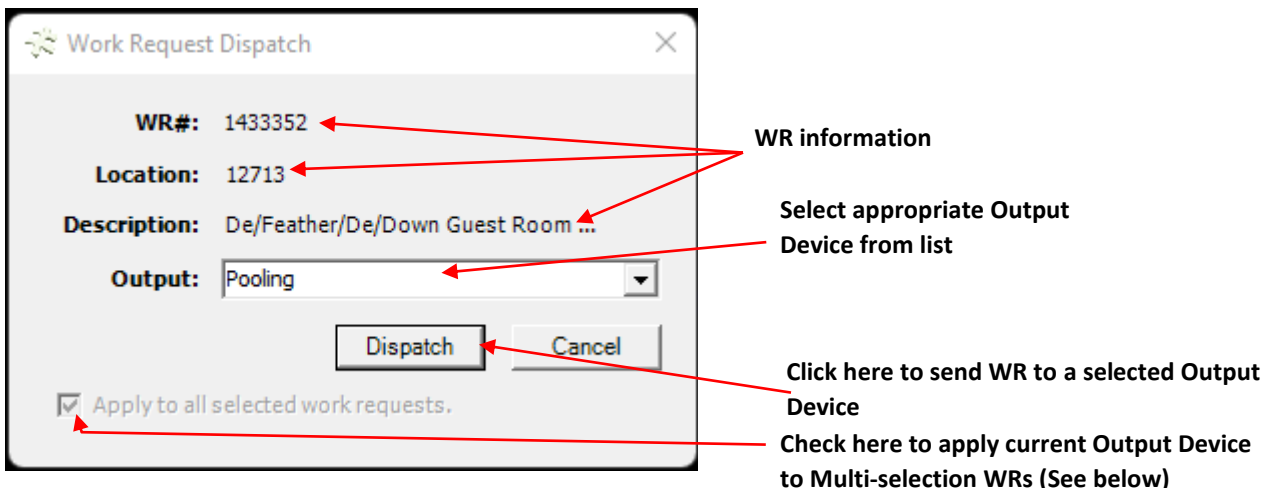
Fields not found on the QuikTicket form are listed below:

- **Receipt** – If checked and the person logged in creating the WR has an email in their employee profile, SynergyMMS will send them an email when the WR is completed.
- **Repair Dept** – The department responsible for repairing the current task, often set by the Task Code.
- **Assigned To** – The employee responsible for repairing the current task can be set by the Task Code. The displayed list reflects the employees that can be assigned work based on the selected repair department.
- **Requested By** – The employee requesting the task if other than the person creating the WR.
- **Type** – If the work request is a guest issue (guest box must be checked), then the Type may be required if this feature is enabled. The Type will equal Defect or Request.
- *Defect:* A guest reports a problem with a service/item (Ex. there are no towels).
- *Request:* A guest asks for an additional service/item (Ex. more towels).
- If you would like this field enabled, please contact a SynergyMMS Support agent.

Buttons not found on the QuikTicket form perform the following actions on the currently selected WR:

- **Cancel** – Cancels changes made to the WR since the last save.
- **Dispatch** – Sends the WR to the Output Device based on selected device or pool.

Note: If the WR does not have an output assigned from the “Assigned To” employee, or the Task Code and pooling is not enabled, the user will be prompted to select the appropriate Output Device from a drop list.



Dispatch Prompt Window

- **Complete** – Marks a WR as complete, stopping the clock which sets the Duration, but leaves the WR open for editing and updating.
- **Close** – Marks a WR as closed, removing from the display of Open WR. WR can be closed without first marking them as completed.

Note: Each of the function buttons also has a keyboard shortcut which allows it to be accessed without using the mouse: Add (Ctrl + Insert), Save (Ctrl + S), Delete (Ctrl + Delete), Dispatch (Ctrl + D), Transfer (Ctrl + T), Complete (Ctrl + M), Close (Ctrl + E).

Note: The “More,” “Closing” and other tabs of the WR Details form are fully explored in the Full View section of this chapter.

Note: The completion time on the “Closing” tab of a WR can be modified only after a WR is completed and prior to being closed.

Multi-selection

Multi-selection allows a user to apply functions to multiple WRs with one action. In this way, several WRs can be completed or dispatched at one time. WRs can be multi-selected by dragging the mouse while holding down the left mouse button or using the Control key (Ctrl) for different effects.

The Control key (Ctrl) when held down while clicking a WR record will add the selected WR to the current collection. This allows non-adjacent WRs to be added to the selected group.

The Right-click Menu

The Right-click Menu allows users to apply functions to any selected WRs. Right clicking a WR record in the list will display the following options menu:

Add	Ctrl+Ins
Duplicate	
Save	Ctrl+S
Schedule For...	Ctrl+H
Dispatching	
Complete	Ctrl+M
Close	Ctrl+E
View Full Detail Report	Ctrl+P
Transfer	Ctrl+T
Delete	Ctrl+Del
Apply Changes...	Ctrl+A

Functions disabled due to user rights will appear in a grey here

Keyboard shortcuts displayed with functions

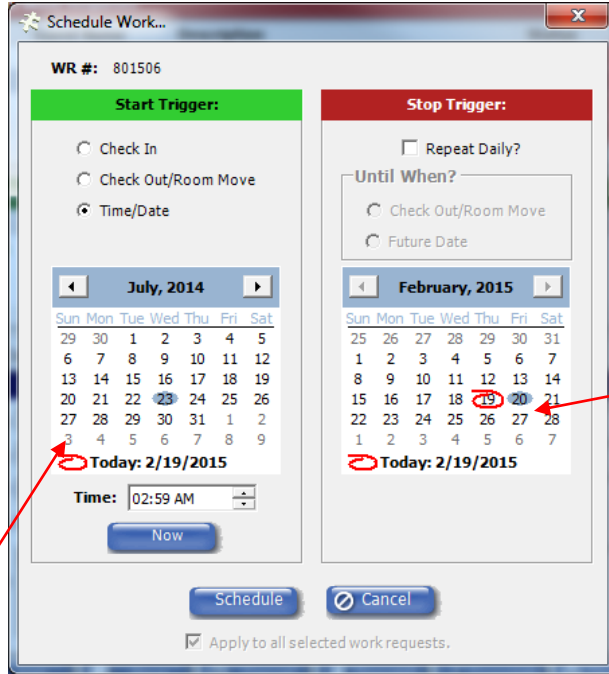
Work Request Right-click Menu

The menu items with the same name as a function button that has already been covered, perform the same as the function button. Those menu items not previously covered, will be covered below:

Schedule For – Allows for a user to schedule forward a WR, it also allows for triggers to be set to auto generate a new WR.

This interface allows and time of the WR, or integrated with based on or triggered the room.

Simply pick a date and adjust the time.



you to simply adjust the date if your PMS interface is SynergyMMS, a WR can be from the check in or check out of

With a PMS interface you can allow for repeat of the work until check out date.

With a PMS interface you can schedule based on check in/out dates

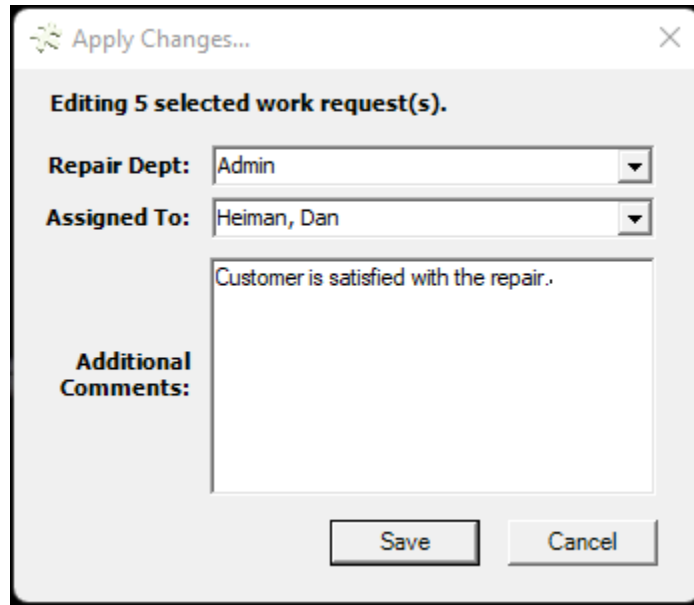
Schedule Work Dialogue Window

- **Start Trigger**
 - *Check In* – Trigger the WR to have a schedule for date based on check in from the PMS.
 - *Check Out / Room Move* – Trigger the WR to have a schedule for date based on check out of from the PMS.
 - *Time / Date* – Enter schedule start date and time.
- **Stop Trigger**
 - Repeat Daily? (Uncheck this box to stop/cancel the work request from repeating)
 - Until When?
 - **Check Out / Room Move** – Trigger the WR to repeat until the guest checks out.
 - **Future Date** – Trigger the WR to repeat until a date in the future.

Note: SynergyMMS allows for a closed WR schedule for / trigger settings to be edited even though it is closed.

- **Transfer** – Used to change the Reporting Department to that of the Repair Department. Depending on the logged in user’s rights, WR may be removed from that in user’s list
- **Delete** – Deletes the currently selected WR(s).

Apply Changes Dialogue Window



- **Apply Changes** – This option allows for the editing of multiple WRs in the following manner:
 - **Repair Dept.** – Updates the repair department for selected WRs
 - **Assigned To** – Updates the Assigned to Employee for the selected WRs
 - **Additional Comments** – Adds additional Comments to selected WRs

The Full View

The Full View displays all the information regarding a single WR. Its layout is like that of the FasTrax View.

Control size and display of this view with these buttons

Click the Close button to close this view

WR List

Currently selected WR

Click on a tab to display more info

Buttons work as they do in the FasTrax View

WR #	Location	Gst	Guest Name	Description	Status	Assigned To	Duration	Started On
1078...	1020			Comment only	⚠	None	4d 04:15	2/13/2017 ...
1078...	1004			InspPM PM inspection	🕒	cheatwood, ...	4d 03:41	2/13/2017 ...
1078...	1004			InspRange Range inspe...	🕒	cheatwood, ...	4d 03:41	2/13/2017 ...
1078...	1004			InspRoom Room inspect...	🕒	cheatwood, ...	4d 03:41	2/13/2017 ...
1078...	1004			InspScore Score inspect...	🕒	cheatwood, ...	4d 03:40	2/13/2017 ...
1078...	1005			InSnagging Snagging in...	🕒	BMT, Test	2d 15:15	2/15/2017 ...
1078...	1005			ENG0050 DEADBOLT OOO	🕒	BMT, Test	3d 00:45	2/14/2017 ...
1078...	1005			ENG0083 FOOS Table, ...	✖	None	3d 00:41	2/14/2017 ...
1078...	1010			HKG1084 Microwave, g...	⚠	BMT, Test	2d 03:38	2/15/2017 ...
1078...	1005			ENGPMAHU03 26 WEEK ...	🔄	Plant, Mister	1d 01:50	2/16/2017 ...
1078...	1601			InSnagging Snagging in...	🕒	BMT, Test	0d 03:32	2/17/2017 ...

Details | More | Closing | Cost | Dispatches | Room | Images

Details - WR#: 1078635 Issued By: BMT, Test (None) on 2/14/2017 2:30 PM

Location: 1005 Repair Dept: Loss Prevention

Category: Locks Assigned To: BMT, Test

Task Code: ENG0050- DEADBOLT OOO Requested By: None

Guest: Type: None

Comments: DEADBOLT OOO --

Receipt

+ Add Save Cancel Dispatch Complete Close WR

The Full View

Note: The Full View Title Bar and its resizing buttons may appear in a color other than displayed here due to the Appearance Settings of your PC. The buttons will minimize and resize in the same fashion no matter what their color or appearance.

The Work Request List

The Work Request List displays the information in an equivalent manner as the FasTrax Progress Panel.

Click here to access Custom Views and the filter row.

Click here to print WR view

Number of WRs in progress appears in the Title bar

Duration color indicates how long the WR has been open

WR #	Gst	Location	Description	Status	Assigned To	Duration	Started On
5514		4003	EPL 1003 Plumbing leak	🕒	None	98d 20:56	2/4/2016 1:38...
5515		Basement	EPL 1003 Plumbing leak	🕒	None	98d 20:55	2/4/2016 1:39...
5516		4007	EPL 1003 Plumbing leak	🕒	None	98d 20:48	2/4/2016 1:45...
5519		None	1. Turn off power2. Check the ic...	🕒	None	98d 20:5	2/4/2016 1:43...
5520		6009	light out - floor lamp	✅	None	0d 00:02	6/12/2010 4:1...
5522		795	test to runner	✅	None	0d 00:33	6/18/2010 10:...
5523		7001	EPL 1003 Plumbing leak	✅	None	0d 01:42	6/22/2010 10:...
5524		3005	EPL 1005 Sink Cleanup	✅	None	0d 00:01	6/22/2010 10:...
5525		3005	EPL 1090 Toilet Overflow	✅	Pete Testor	0d 00:02	6/22/2010 10:...
5526		4003	EPL 1005 Sink Cleanup	✅	None	0d 00:33	6/22/2010 10:...

The Work Request List

Adjustable column widths

Selected WR highlighted

Sort the WRs by clicking any column header, click once for ascending and twice for descending

The Full View Details Tab

The Full View Details Tab functions exactly like the Details tab of the FasTrax View. The Full View Details Tab Title Bar displays the name of the employee that created the WR along with the date and time the WR was created.

More info appears in the Title Bar

Details | More | Closing | Cost | Dispatches | Images

Details - WR#: 182762 Issued By: Hirayama, Romeilyn (PBX) on 6/6/2016 7:48 AM

Location: 21302 Repair Dept: MAIN

Category: Tub/Shower Assigned To: Bowman, Moffett

Task Code: 3045- Master bath shower issue Requested By: None

Guest: gomez Type: None

Comments: Master bath shower issue -- handle broken

Receipt

The Full View Details Tab

Note: by double-clicking the Comments box, it will maximize the Comments section.

The Full View More Tab

The Full View More Tab contains additional information regarding the WR.

WR info appears in the Title Bar of each tab

Click (...) to open the Schedule For box.

The Full View More Tab

User Defined fields, may appear with different names than listed here

The fields of this form display the following information of the currently selected WR:

- **Trade** – The trade within the department responsible for repairing the current task, often set by the Task Code.
- **Output To** – The device, such as a printer or pager, the WR will be delivered to on Dispatch, often set by the Task Code, Assigned To employee, or by Pooling.
- **Estimated Time** – The amount of time is displayed in days, hours, and minutes -the task is expected to take to complete, often set by the Task Code. If you are using escalations this determines how long a ticket is open before being sent to the MOD.
- **Grade** – The number of points deducted from the location’s score while this WR is open, often set by the Task Code.
- **Priority/Filter** – The priority assigned to this WR, or a Filter number used for reporting, often set by the Task Code.
- **Duplicated** – The number of times this WR was requested while in the open state. Non-editable.
- **Schedule For** – The date and time the WR is scheduled to begin, is by default used to determine when the WR will display on the list. This is dependent on the Custom view that is active. When the time comes due, the Start time of the WR will be updated to match this time. The Schedule For also WR to be scheduled and repeated based on dates or based on a check in and check out from a PMS interface. This interface also allows WR to be triggered multiple times in the future.
- **Equipment** – Used in Preventive Maintenance and for any WR dealing with a piece of equipment. This will allow tracking for preventative, as well as reactive, maintenance. Reports can be generated to determine cost to maintain the equipment.

- **User Defined Fields** – These three fields are custom search fields to allow more grouping and filtering of the work for custom views and reports. The labels may display different names than those listed here. These are customizable in the Preferences.

The Full View Closing Tab

The Full View Closing Tab contains information related to closing a WR. It contains the times the WR was started and completed, and the Completion Code assigned to the WR.

WR info appears in the Title Bar of each tab

Calculated from Start and Completion time, if set manually updates the Completion time accordingly

The Full View Closing Tab

If WR is not yet completed, displays current date and time

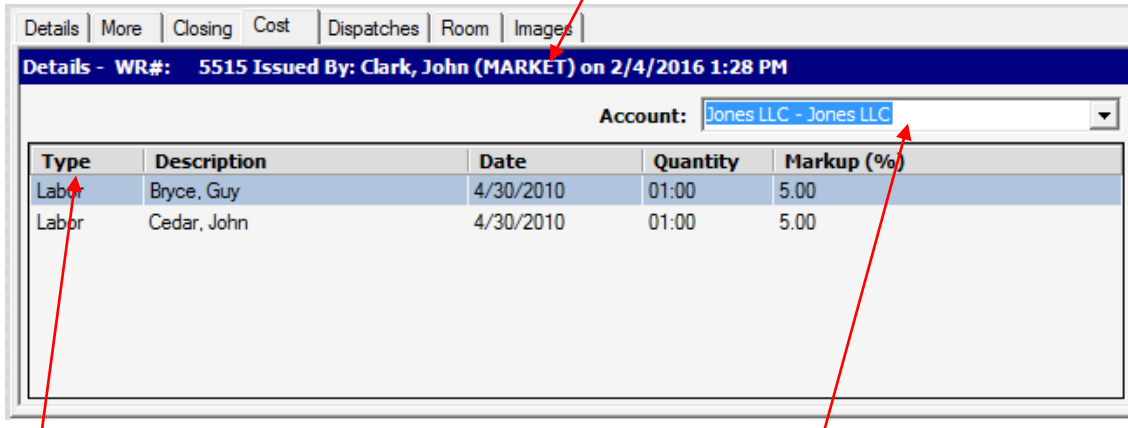
The fields of this form display the following information for the currently selected WR:

- **Completion Code** – Code assigned to the WR when closing, often displays reason for closing.
- Contact your SynergyMMS Vendor or Support to configure this to prompt the user during completion, closing or both.
- **Duration** – The time calculated from the Start and Completion times, if set manually it will adjust the Completion Time according to the new duration.
- **Start Time** – The date and time the work began on this task. This will be the open time unless edited or if the schedule for time is set.
- **Completion Time** – The date and time the work was completed on this task. This may be different than the closed time.

Note: the function buttons at the bottom of the Full View work the same as those at on the FasTrax View.

The Full View Cost Tab

WR info appears in the Title Bar of each tab

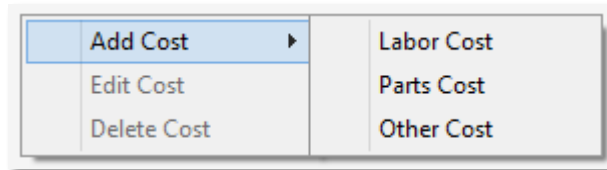


THE FULL VIEW COST TAB

SynergyMMS allows for 3 distinct types of cost: Other, Parts or Labor.

An Account can be used to group cost for billing purposes.

To access and add cost, simply Right Click in the area where cost records display. The Menu to “Add Costing” will pop up. Choose what you want to add.



The “Costing” tab in SynergyMMS, contains information related to the cost of the WR.

Types of cost can be Labor based on hourly rates of Employees, Inventory, or Other, which is a free form option.

Cost can be added through the desktop here. SynergyMMS also allows costing to be added through the email dispatch process and the apps.

To add a cost right click on the table and you will be given the option to “Add Cost” and select the type of cost. Then a window will display which will allow you to fill in the details for the cost.

COST WINDOW – FOR LABOR

Note: The actual dollar amounts for labor are not shown in this area.

If you click on existing cost information you will be given the option to add, edit, or delete.

- **Account** – Means of cost for billing and reporting purposes.
- **Type** –
 - *Labor* – This uses the employees list and their defined rates for the amounts.
 - *Parts* - This uses inventory items and pulls the rate of the item.
- **Other** – This is a free form area where items that do not fit into the employees’ section or inventory can be added as cost to a WR.
- **Date** – Date work was done.
- **Description** – This will default to the selected item or show comments typed.
- **Quantity** – Quantity of the item or hours worked.
- **Markup** – Defaulted from the Preferences setting as to what the mark up should be on the goods or services used on the work request.

Note: Users must have rights to view or adjust cost.

The Full View Dispatching Tab

Details - WR#: 5515 Issued By: Clark, John (MARKET) on 2/4/2016 1:28 PM					
Output Name	Output Details	Employee	Pool Name	Date Sent	Status
Kim C	None	None	ENG Daily	3/2/2015 9:58...	⚠
Eng Printer	\\SAI-SRV01\HP-8000	Chapman, Bill	Escalation_Pool_0	3/2/2015 9:58...	!
eng printer 1	\\sai-srv01\HP-8500	(various)	Escalation_Pool_2	3/2/2015 9:58...	!
Kim's Email	kcheatwood@saicorporate.com	(various)	Escalation_Pool_0	3/2/2015 9:58...	!
SAI 2-Way	4194091694@login@snpp.me...	(various)	Escalation_Pool_0	3/2/2015 9:58...	!
None	None	None	None	3/2/2015 10:2...	🕒

The Full View Dispatching tab is for display only, it displays the devices as they are being dispatched to, and the replies as they come back in. This will allow you to see the specific outputs the WR is being delivered to as well as specific Pools. If an employee has claimed a device the Employee name will show also.

Status will match basic status icons of WR.

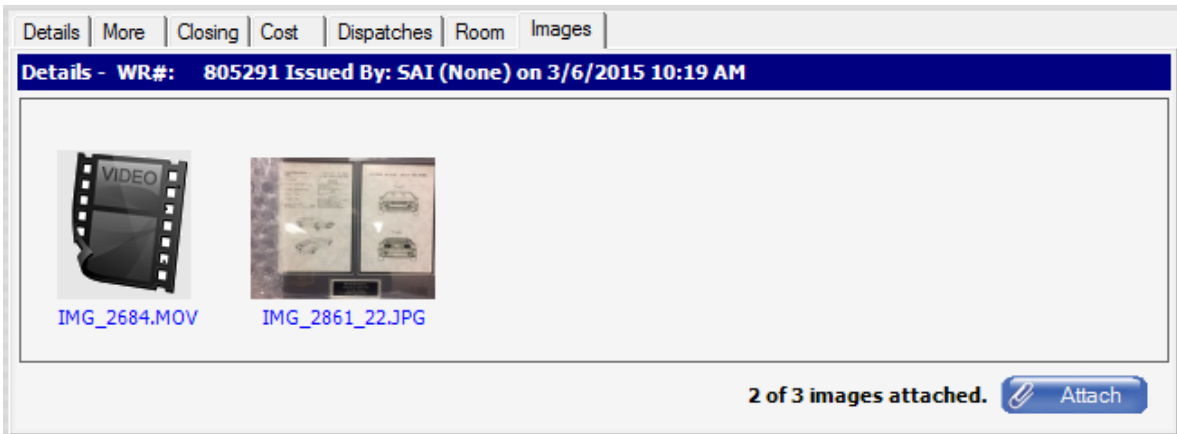
If the Start/Stop process is implemented those statuses will display here also. See Start/Stop Process later in this chapter for more information.

The Room Tab

Details - Room#: 4035	
Guest Name: SHARON SMITH	Room Layout: None
Guest VIP:	Arrival: 2/11/2015 12:00:00
Loyalty: GOLD	Departure: 2/15/2015 12:00:00
Occupancy Cnt: 3	Special Requests:
Guest #:	AE,HF,NS
Group: AAA	
Language: EN	

The Room tab, display only, will display if you have an active interface to your PMS system. With this interface we can provide current occupancy and basic information relative to the guest. This is read only. No user input can be done here.

The Images Tab




The Images tab allows a user to add up to 3 pictures or videos per WR. The following types of files are allowed formats; gif, jpg, mov or mp4, png or tif.

Items can be attached to a WR once the WR has been saved. They can be added from the desktop or from the iOS / Android mobile applications.

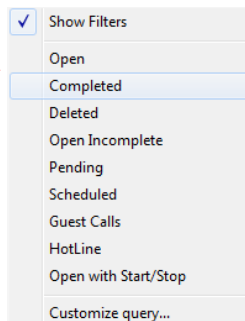
Attached files are limited by default to 16MB per file.

Clicking on the picture in the desktop interface will open it on the computer.

Custom Views

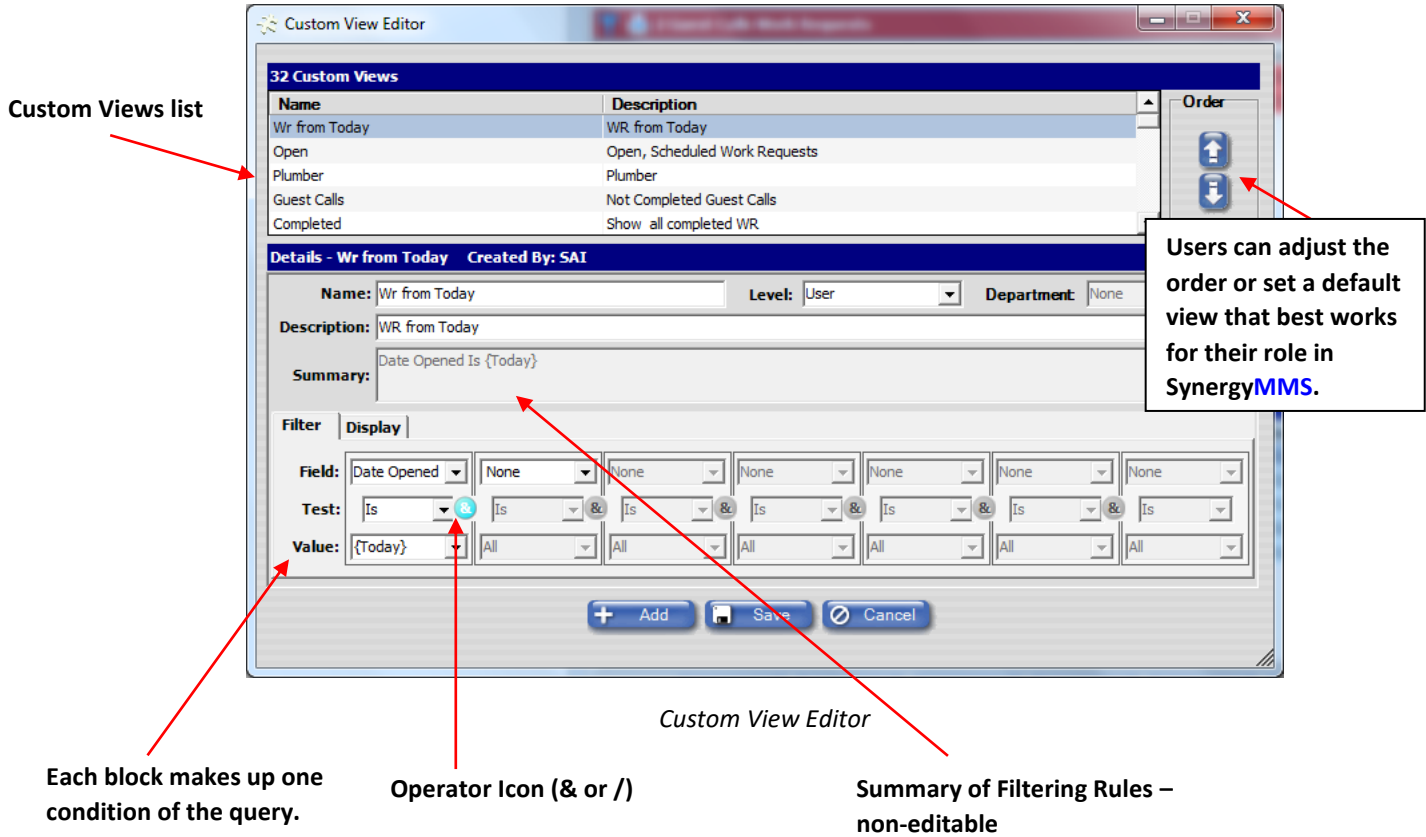
Custom Views are a powerful tool that allow SynergyMMS to be customized Work Request screen to fit the role the user needs. Custom Views can be created by users that have rights to create, once created the view can be shared with a department, or with all SynergyMMS users. The view is saved so that it can be used as often as needed. To access the Custom Views menu items, Left-click the Funnel Icon  top left in the Work Request List and then select one of the listed views to apply it to the WR List.

Click here to create or edit a User custom view



Custom View Menu

Clicking Custom query on the Custom View Menu displays the Custom View Editor. Use this tool to create or edit Custom Views.



Custom view form

The fields used in the Custom View Editor are as follows:

- **Name** – Name of Custom View, listed in Custom View Menu; must be a unique name among custom views.
- **Level** – Details if the Custom view will be shared by a department or all users.
- **Department** – If the Level is set to Department, choose the department that will have access to this view.
- **Description** – Description of Custom View.
- **Summary** – Summarizes the conditions of the Custom View – non-editable, created by SynergyMMS.

Filter Tab

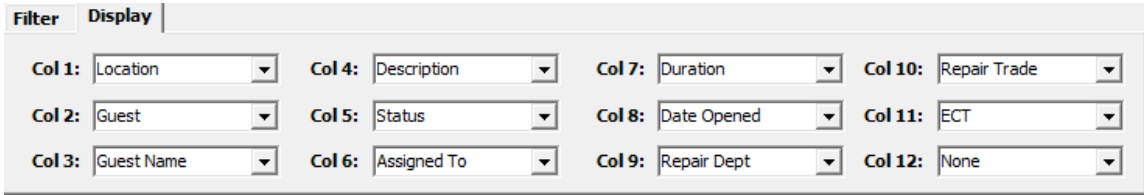
- **Field** – Field of WR used for the condition.
- **Test** – Test applied to the field for the condition.
- **Value** – The value used as criteria for the condition.

Note: If more than one condition is applied in a Custom View the Operator Icon becomes active between each rule. The Icon defaults to which acts as an “And” operator. Clicking this Icon changes it to which acts as “Or” operator.

The buttons on the Custom View Editor are as follows:

- **Add** – Click to add a new Custom View.
- **Save** – Save current Custom View.
- **Cancel** – Cancels recent changes made to currently selected Custom View since last save.

Deleting a Custom View is done through the Right-click Menu. Right-click on the desired Custom View in the list and select “Delete.”



Custom Views Display Tab


Display Tab

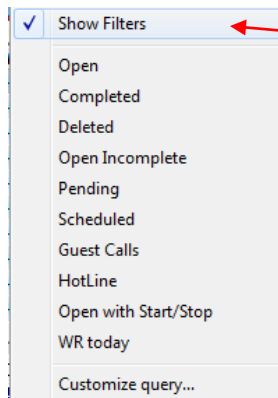
The Custom Views Display Tab contains 12 fields that can be used to determine the display columns for the currently selected view.

Order

Users can adjust the order or set a default view that best works for their role in SynergyMMS. To set a custom view as default, use the order arrows to move the view to the top of the list. Once this is set, this will be the way WR are viewed.

Filters

The WR Filters allow for fast search of the WR list. To turn on Filters, Left click the Funnel Icon  top left in the Work Request List, then click Show Filters. The Filter white boxes will appear above each displayed column header. Type in any Filter field to limit the currently displayed view of WR to only those WR with matching items.



Click here to display Filters

Custom Views Menu

Type in any filter to apply to WR List

WR #	Location	Gst	Guest Name	Description	Status	Assigned To	Duration	DateOpened
793356	Telepho...			B1 Check In - Bags up...	✓	fox, fox	4d 20:05	6/8/2012 2:1...
793357	ADMIN. ...	test		test	✓	fox, fox	1d 23:13	6/11/2012 1...
793358	AVW			DI-PO PROP OP DEPT...	✓	fox, fox	1d 21:11	6/11/2012 1:...
793359	ADMIN. ...	test		est	✓	fox, fox	1d 20:37	6/11/2012 1:...
793360	B1-18	test		test	✓	fox, fox	1d 04:28	6/12/2012 5:...
793361	AVW	test		test	✓	fox, fox	0d 22:50	6/12/2012 1...
793362	Telepho...			B2 Check Out - Bags d...	✓	None	13d 20:31	6/13/2012 1...
793363	ADMIN			17 PHONE OOO	✓	fox, fox	12d 20:07	6/14/2012 1...
793364	ADMIN			559 LAUNDRY LINT BL...	✓	None	12d 20:06	6/14/2012 1...
793365	5-BLD-3			559 LAUNDRY LINT BL...	✓	Elvis, ENG	12d 20:06	6/14/2012 1...

Work Request List with Filters displayed

The “Show Filters Menu” option will display a check mark next to it when the Filters are displayed. Click “Show Filters” to remove the check mark and turn off the Filters.

Columns

Clicking on a gray column header will force that column to sort in ascending order. Clicking the gray column header, a second time will sort in descending order. A small arrow will show to the right of the header name.

Printer

Clicking the printer on the Full View title bar will allow the user to print the data displayed in the manner it is displayed, or to print the selection only.

This is a great tool when combined with filtering.

Work Request Dispatching

WRs can be sent or dispatched to several different devices. These devices are listed in the **Outputs** area of **Setup**. SynergyMMS can be configured to dispatch to selected **Output Devices** or to a designated **Pool** for processing. If the WR is of a high enough priority (PRI 1) it can be **Escalated** to an assigned Manager on Duty (MOD) if the work is not completed within a predefined amount of time. The mode of dispatching (Output Devices/Pools and Auto/ manual) is selected in the **Preferences Dispatching Tab** of **Setup**.

The dispatched message consists of:

- **Subject** – This contains the Priority if it is a Pri1, the Location, the Work Request number and, if marked as a guest issue, the guest’s name is shown.

Note: A subject longer than 42 characters will be truncated and continued in the Body.

- **Body** –A link if enabled to reply.
The Description of the WR and replies allowed.

SynergyMMS will automatically adjust the status of the WR based on the reply of the dispatch, or if the ECT expired and based on Escalation settings.

SynergyMMS will listen for a reply the greater of the following:

- Two days
- Two times the ECT for PRI1, eight times the ECT for non PRI1.
- Replies processed after SynergyMMS stops listening will not be processed.

Users that have rights to override a pool may also cancel a WR once in progress. This Cancel Dispatch process stops all future dispatching regardless of to just an output or to an MOD as part of an escalation.

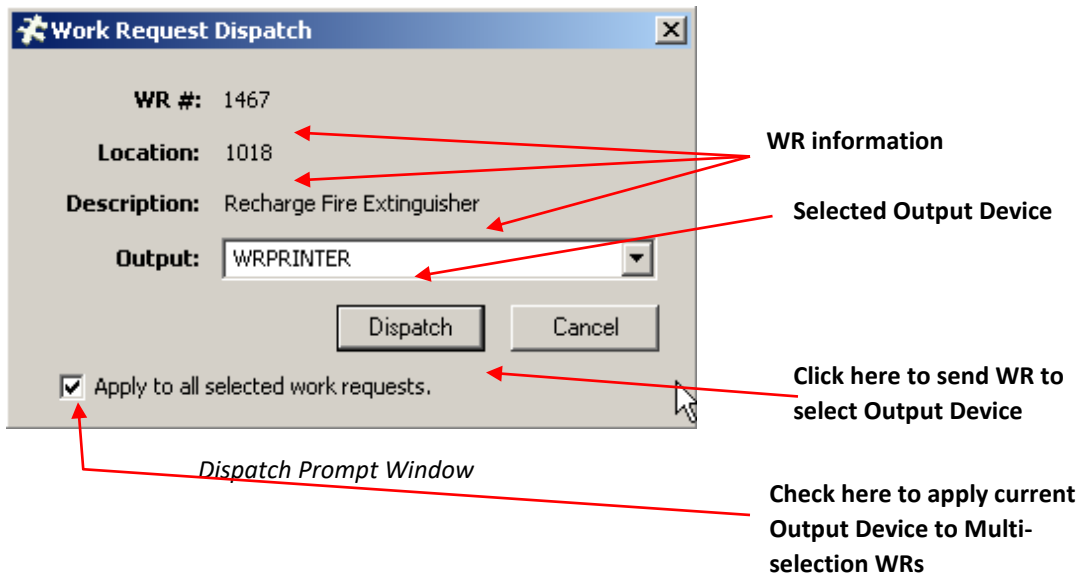
Output Devices

Output Devices can be any valid item in the “Outputs” area of “Setup.” WRs can be dispatched to a specific Output Device. This device can be set by the **Task Code**, or by the employee **Assigned To** the WR, or manually selected at the time of Dispatch. An output can also be assigned based on an active Pool if Pooling is on. This is configured in the Preferences section of SynergyMMS.

The outputs where the WR has been dispatched to, along with each response from the output device, will be shown on the Dispatch tab.

A WR may only be dispatched to one Output Device at a time in Outputs mode. Users wishing to send a WR to multiple devices must dispatch it once to each device. When a WR is dispatched more than once, the user will be prompted to select an Output. Users will also be prompted to select an Output if no Output Device is already assigned to the WR.

A WR can be dispatched to an Output Device at any point in the life cycle of the WR up to the point the WR is Closed. Once a WR is Closed it can no longer be dispatched. A WR that has been Completed can be re-dispatched, which removes the completed status.



Pools

Pools are best described as a combination of schedules and criteria for determining which device a WR should be dispatched to. Pools can be active for certain days and specific hours. Criteria for determining where to send the WR includes whether it is Guest related, if it is the responsibility of a particular Trade or Department, and what area of the building the WR occurs. Setting up Pools is detailed under the heading of Pools in the Setup section of this manual.

When dispatching to Pools, the user does not select which Pool to use. The WR is dispatched (either automatically or manually as determined by the **Preferences in Setup**) and **SynergyMMS** determines the appropriate Pool based on the information in the WR.

Pools will be evaluated based on a match of a Trade first. If a Trade pool does not exist that corresponds to the criteria of the WR, **SynergyMMS** will evaluate the Department based pools to attempt to find a match.

WRs that do not match the criteria for any Pool will either Escalate or Fail based on the Escalation settings in Preferences (see **Escalation** below). WRs that meet the criteria for a Pool that is not currently active will be processed depending on the Estimated Completion Time of the WR:

- ECT overlaps beginning time of Pool – The WR will be dispatched once the Pool is active.
- ECT is not within active time of Pool – The WR will be Escalated or marked Failed based on the Priority of the WR (see **Escalation** below).

The Pool can be overridden by setting the Output of the WR to a specific device if a user is granted that right.

Start / Stop Process

The Start/Stop process in **SynergyMMS** enables a user to start and stop a work request from a mobile device. This will allow **SynergyMMS** to track actual hours worked done on a request for costing and other purposes.

SynergyMMS allows start and stop to be done from both email and push type outputs.

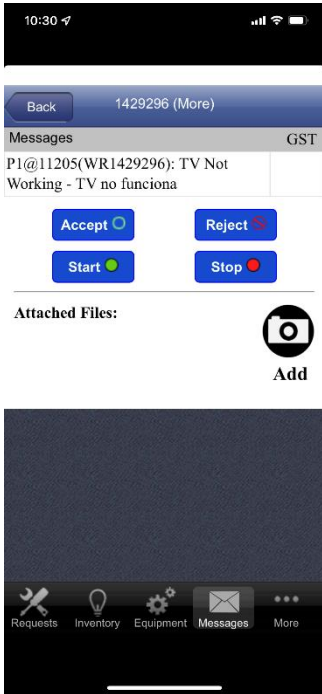
Once a device has been Claimed, the below information is the details for Start and Stop of a WR from an email.

Two additional response numbers are contained in the message sent to an output device to control starting and stopping work on a work request.

Starting work on the work request: If a user enters a numeric four (4) on the mobile device and sends, Synergy Dispatcher will interpret this value as starting a work on a work request.

Stopping work on the work request: If a user enters a numeric five (5) on the mobile device and sends, Synergy Dispatcher will interpret this value as stopping the work on a work request.

Multiple users can independently start and stop their own work on a work request. Users cannot start or stop work for another user.



EXAMPLE DISPATCH DISPLAYED ON A PUSH-TYPE DEVICE



EXAMPLE DISPATCH DISPLAYED ON A TEXT (SMS) DEVICE

A user can start and stop work on a work request from the mobile device in which the original dispatch message was sent or user could initiate a new message that would indicate starting or stopping work on a work request.

Starting work on a work request will mark the work as Accepted if it has not already been and add a new costing record with the current start time with a zero duration.

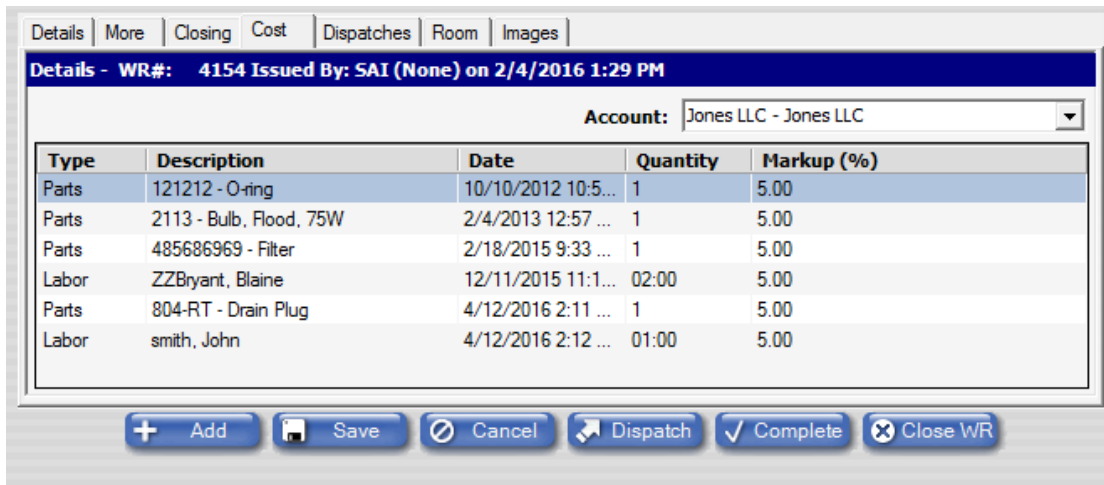
Stopping work on a work request will update the duration value with the elapsed time since the start time is in the corresponding costing record. A costing record with a duration greater than zero will be considered completed and not modifiable by a start or stop action.

Actions that may occur:

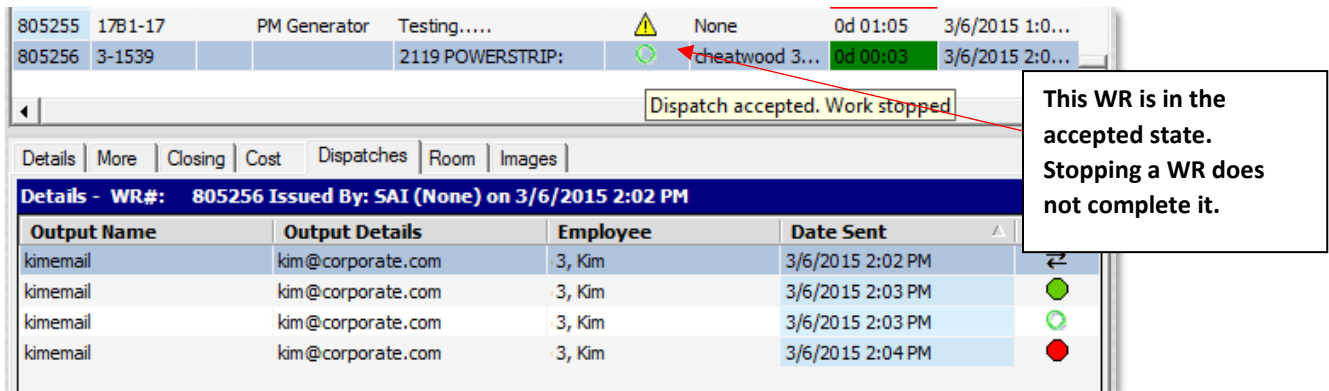
- If a user starts work on an open work request, a new labor cost record is created with an initial 0 duration.
- If a user starts working on a work request that the user has already started, but has not stopped, the action will be ignored, and a message sent back to the user.
- If a user tries to stop working on a work request that has not been accepted, the action will be rejected, and an error message sent back to the user.
- If a user tries to stop working on a work request that has been accepted but not started, the action will be rejected, and an error message sent back to the user.
- If a user starts work on a work request that has been accepted, started, and stopped a new costing record for that user will be added with a current start time and a zero duration.

- If a work request is marked as completed all zero duration costing records for all users for that work request will be updated with the elapsed time from the start.
- If a work request is closed fill in all 0 value durations with current date/time.
- If a user selects “complete,” the labor time will stop recording and change to a completed status. If the user selects “stop,” the work request is not necessarily complete and must still be completed.

The costing tab of the work request will be modified to show cost entries created using the start and stop.



The Dispatching tab of the work request will show a Start status and a Stop status



The above arrow is pointing to the work request status column. It will display the current status. the current state, started, or stopped information if known.

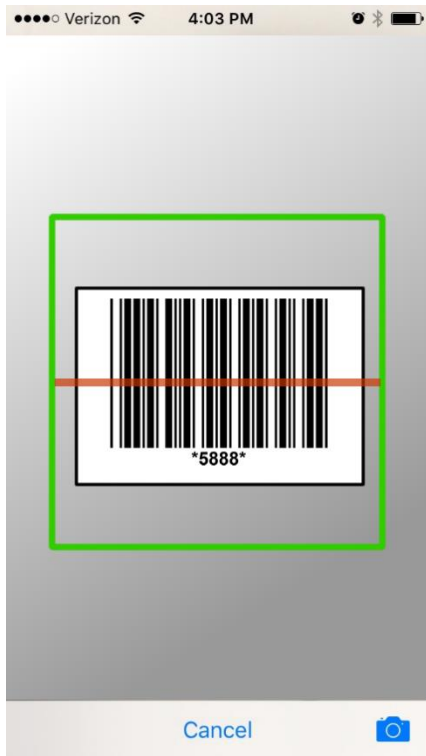
Note: The Start / Stop process works in combination with the Claim / Un-claim function as devices must be claimed before it can Start or Stop a work request.

Scan to Start

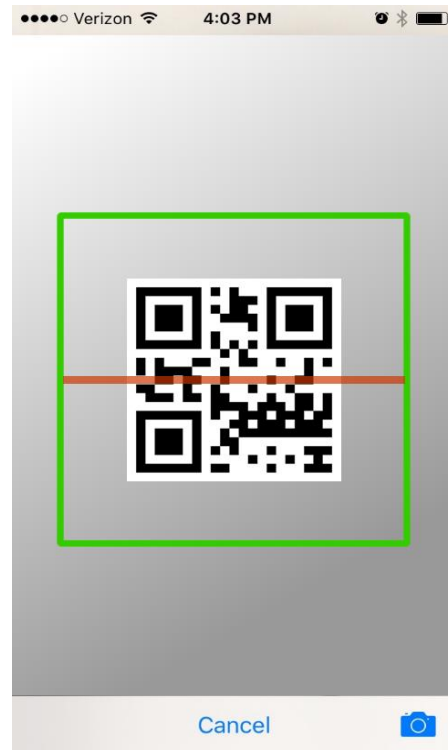
With the Scan to Start process in SynergyMMS, a user can start work on a work request from a mobile device via scanning a barcode label on a piece of equipment or a location. This process allows SynergyMMS to track labor time on requests much more accurately for costing and other purposes.

The Scan to Start process provides proof of presence. In a property using the Scan to Start function, barcodes will be placed at a location or on a piece of equipment and registered in SynergyMMS. When a user begins work in an area with a barcode, and the start button is activated, a barcode scanner will automatically be enabled using the mobile device's camera. Users then scan the barcode, and if it matches with barcode the work request is looking for, the work time will begin recording. On the desktop, the work is shown as started and in-progress. The Full Detail Report will indicate if the work request was started using the barcode scan. The Scan to Start is not only for work requests but can be used with preventive maintenance as well.

On the Start / Stop menu, when Scan to Start is activated, selecting "Start" will display this screen in which a barcode can be scanned:



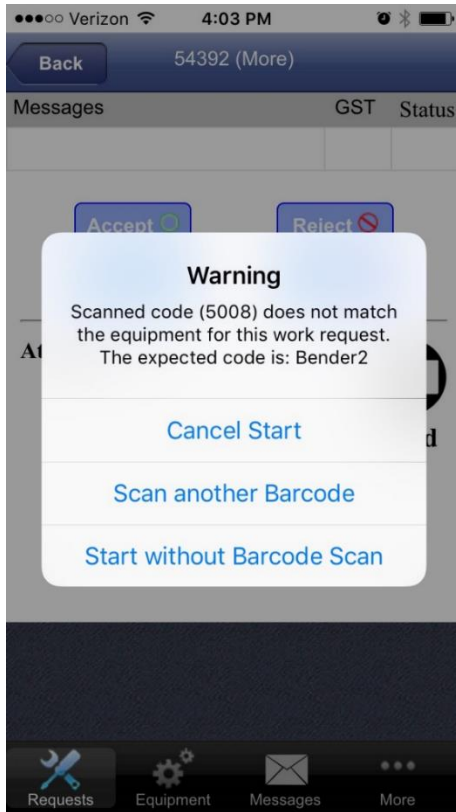
UPC code



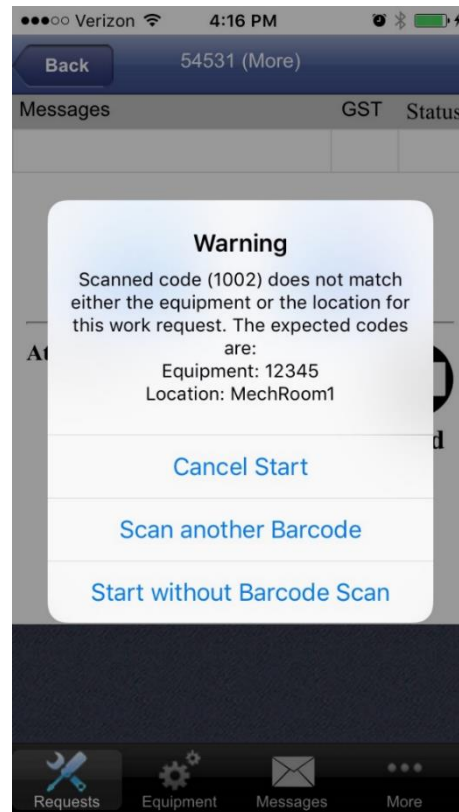
QR code

When the scan is correct, there is no confirmation message. The screen simply reverts to the "Start / Stop" screen and the start button is disabled because the user's scan was successful. The stop button is available for selection to end the time worked on the task.

If an incorrect barcode is scanned, either of these two messages will display indicating whether the user has scanned the incorrect location or equipment. The expected code is also displayed.



Incorrect equipment



Incorrect equipment or location

The proof of presence provides managers with peace of mind in knowing their employees are working in the correct location or on the correct equipment. And in turn, users can also ensure that they are working on the proper task at the appropriate location.



Embassy Suites
All (Open and Closed) Work Requests WR Full Detail
 8/4/2021 - 8/17/2021

Work Request #: 33798	Opened: 8/4/2021 1:00 PM
	Scheduled For: 8/4/2021 1:00 PM
	Duration: 17m
Task Code: QC-FE-M	Reporting Dept: Engineering
Assigned To:	Location: Fitness Center
Repair Dept: Engineering	Equipment: Treadmill 1
Trade: Not Assigned	UserDefine1: None
Requested By:	UserDefine2: None
Guest Name:	UserDefine3: None
Output: Not Assigned	Duplicate Count: 0
ECT: 30m	Grade:
Priority: 99	

Description: QC Fitness Equipment Monthly

Comments:

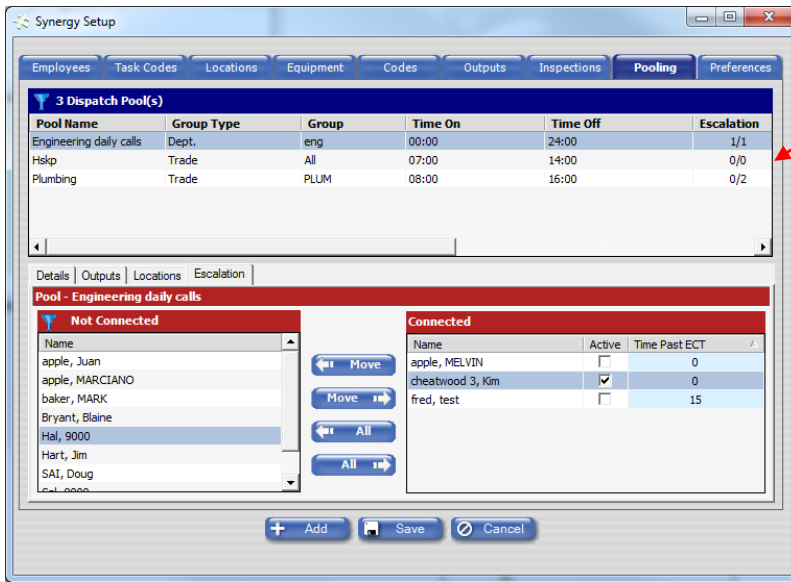
Completion:

Transaction History Details

Description	Employee	Detail	Date/Time
Created	Luigi	location = Fitness Center assignedto = Saenz, Luigi taskcode = QC-FE-M output = None datescheduledfor = 8/4/2021 12:00 PM parent pm = Fitness Equipment Monthly parent wr# = 33767	8/4/2021 1:16:13 PM
Added Costing	Luigi	wrcost = Labor	8/4/2021 1:16:38 PM
Presence Verified	Luigi	equip = Treadmill 1	8/4/2021 1:16:38 PM
Started	Luigi	b11db690-14a5-4f7a-be37-792751828189	8/4/2021 1:16:38 PM
Edited Costing	Luigi	wrcost = Labor	8/4/2021 1:16:49 PM
Completed	Luigi		8/4/2021 1:16:56 PM

Proof of Presence displayed on a report

Escalation



Escalation delivery can be based on a time set in the setup of the pool.

Escalation is the process by which designated individuals are notified if a PRI1 WR is not completed within a set period. There are several areas that require initialization and setup before this process is fully functional at your property. The steps below outline the required setup. This is followed by a detailed explanation of the criteria and behavior of Escalated WRs.

- **Turn on Escalation in SynergyMMS –**

This is a system-wide Preference setting. It affects all WRs that meet the appropriate criteria as outlined below. Please see the **Preferences Dispatching Tab** in the **Setup** section of this manual for more information on enabling Escalation.


- **Designate Eligible MODs** – MODs, or Managers on Duty, are Employees within SynergyMMS that are eligible to receive Escalation notifications. These individuals are designated by the **Can Be MOD** field in their employee record. Please see **Employee General Tab** in the **Setup** section of this manual for more information on designating an Employee as an MOD.
- **Assign Outputs to MODs** – Outputs are how MODs receive their Escalation notifications. Valid Outputs are email accounts or push. Each of these devices must first be added to the **Outputs** list in Setup. Please see **Outputs** in the **Setup** section of this manual for more information. Once the Output has been added to this list, it may be connected to an MOD through the **Output** field in the Employee record. Please see **Employee General Tab** in the **Setup** section of this manual for more information on assigning Outputs to MODs. MODs can also use the Claim / Un-claim feature to make the output active.
- **Assign MODs to receive Escalations** – Once eligible MODs have been designated, they may be connected to a pool to receive Escalation notifications. Trade or Department can group these notifications. See Pooling for processing order
- **Time Past ECT** – Allows for the delivery to be further delayed or allows for a tiered Escalation process.

Once these steps for activating Escalation have been completed the Escalation process applies to all WRs that are dispatched and have a Priority 1. By default, Guest WRs are priority 1. Priority can be assigned by the Task Code, making a WR Guest related, or manually setting the **Priority** field on the **More** tab to 1. A Priority 1 WR *must* be dispatched to be processed for Escalation. Dispatching can be done manually, by clicking the **Dispatch** button on the WR form, or automatically if the proper setting is enabled on the **Preferences Dispatching Tab**.

The time of Escalation is dependent upon the WRs **Estimated Completion Time (ECT)**, and Like Priority, ECT can be assigned by the Task Code or manually setting the ECT field on the **More** tab. If no ECT is set, SynergyMMS will proceed as if the ECT were set to 15 minutes. The time of the delivery of the Escalated message is dependent on the setup in the Pooling of the MOD's and the ECT.

After a WR has been dispatched, if the WR is not Completed or Closed within the ECT an Escalation notice will be sent to the assigned MOD(s). If no MOD is assigned in the Preferences, the WR will be dispatched in an escalated state to the original recipient.

Within the FasTrax interface WRs that are Escalated are moved from the Progress Panel to the Action Panel so they may be addressed.

Escalated WR show with an Escalated () Status icon.

Dispatching a WR a second time will result in a new Escalation time. It will also reset the WR status.

Escalation following a WR that was dispatched through the Pooling process will happen after all outputs have been exhausted and after the end of pool (EOP) setting. Default value of EOP is 1 minute or 60 seconds.

Samples:

1. A WR dispatched with **SynergyMMS** in Pooling Mode to a pool where no active outputs exist, or no pool is found that fits the WR will Escalate immediately.
2. A WR dispatched with **SynergyMMS** in Pooling Mode to a pool with one or more active outputs will exhaust the active outputs provided and then escalate based on the ECT or the EOP whichever comes first.

Escalated WR can only be completed from an output, desktop, or the iOS / Android apps. An escalated WR cannot be accepted or rejected from an output device. **SynergyMMS** will actively listen for a reply for two times the estimated completion time.

Chapter 5 SynergyMMS: Preventive Maintenance

Preventive Maintenance (PM) is a key component of SynergyMMS. The tools SynergyMMS provides to interact with PM Schedules have been streamlined to provide a more focused, easier interface.

The concept here is that work or jobs that need to be done in a recurring fashion should be added to the PM section of SynergyMMS. Work requests (WR) are then generated from these PM schedules and can then be tracked. These jobs can include room PMs or inspections, equipment maintenance and inspections, or required repeat readings, daily rounds, or daily cleaning. Even jobs that get every other year, or every third year, can be added, as well as jobs done every hour.

Any repetitive job that completed on a scheduled basis can be setup in the PM area of SynergyMMS.

There are often many questions on what should or can go into the PM area. We have detailed a few examples outside of the standard equipment/location maintenance and inspections below.

1. Fire Extinguishers –
Adding the Fire Extinguishers is a straightforward process in the equipment list. If there is ever an insurance issue you have all the details to backup that a particular Fire extinguisher was checked, and PMs were completed per standards
2. Automobiles –
If you oversee the maintenance of automobiles SynergyMMS makes it quite easy to make sure that they receive regular oil changes and other maintenance.
3. Housekeeping -
Most companies have standards that Housekeeping must complete certain tasks on a periodic basis.
4. IT -
Computers get refreshed on a 2- or 4-year schedule.
5. Daily Cleaning rounds.
Every hour cleaning of public space can be setup with an inspection of all items to be touched.

Now let us review the basics of how SynergyMMS manages PMs.

Preventive Maintenance Basics

SynergyMMS manages PMs in an incredibly unique method that can put most of the burden into the application and less on the team member that will set it up. It allows users to define PM Schedules and then connect those schedules to items defined in the Equipment or Locations setup areas.

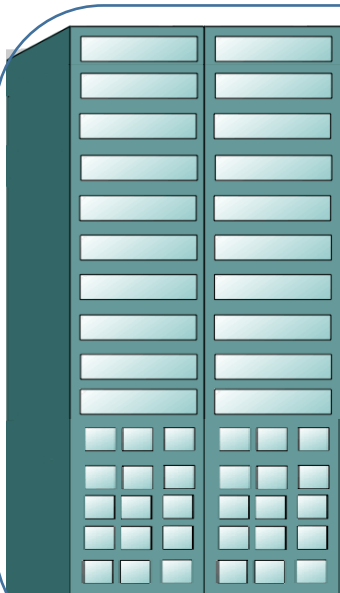
SynergyMMS auto generates PMs based on frequency or occupancy or lack of occupancy setting. It also offers a PM on Demand area that allows users to force a PM to generate now based on users' needs. There is also a PM Calendar interface to look at how well work is balanced for the property and to forecast for future needs.

Before any of the extras can be used, the schedules must be created. We have assumed that all the equipment in your facility is defined within the Equipment List, and all locations have been defined in SynergyMMS already. If this is not the case, you will need to set these areas up first before continuing.

Similar pieces of Equipment will have similar needs for PMs. The same is true about Locations. In SynergyMMS the need is defined only once. The need is called a PM Schedule, and the schedule must define a frequency for the work to be done and a description of the work to be completed. Once the schedule is defined, you simply connect pieces of Equipment or Locations to that schedule.

Here is a scenario to help setup SynergyMMS PMs. Please note that in some cases you may have almost the same PM Schedule and frequency, but due to an item that makes them unique, separate PM Schedules with different connected items.

Let us pretend we have a 15 floor Hotel 30 rooms per floor. Guest rooms starting on the 5th floor.



Hotel SynergyMMS - is made up of the following items.

2 distinct towers one East Tower, one West tower.

30 Ice Machines - Each Guest floor has 2 Ice Machines, one in the East tower one in the West Tower.

We have total 300 Guest rooms.

10 AHUs

2 Chillers

2 Boilers

We have one engineer that maintains the Ice Machine PM's.

We have two engineers that handle Room Inspections

We have other engineers that maintain the equipment.

Ice Machines

1 PM for all

To make things easy, let's walk through setting up a PM that will manage all the Ice Machines. This PM will occur once per month, and all the ice machines will get a separate WR. The WR date will be based on our start date, and if we close the previous month's PM.

Click Add on the PM Schedules page.

Fill in the following fields:

Work Definition:

Schedule name: 'Ice Machine Monthly cleaning.' This can be anything that makes sense to you.

Schedule Type: Equipment. We have defined our Ice Machines under the Setup / Equipment list.

Details: Select an Inspection. See Setup Inspections for details. We will assume this inspection is done correctly so most of the other fields are now also filled in.

Assigned To: Name of the engineer that will complete this job. When the WR generates from the PM schedule, the engineer's name will appear in the "Assigned To" field.

ECT: How long does it take to do this? WR will have this so we can see how much work our engineer must do, and the PM Calendar will use this in its calculation of labor time needed to complete PM's.

Questions:

This will be filled in based on what Inspection we selected.

Schedule

Schedule Mode: Regular

PM Generation Options:

Frequency: Monthly

Start Date: Dec 5, 2020. You can set this for today or tomorrow or what works best for you. Remember once you set this and connect items and this date comes due PM's will generate.

Start Time: 4:00AM

Connection

Connect all the [Ice Machines](#) regardless of where they are.

Split PMs per tower

Now let us complicate things a bit. Let us make a copy of our original Ice machine Weekly cleaning.

On the original PM Change the title to '[Ice Machine Weekly cleaning East](#),' also go to the Connected tab and remove the ice machines that are on the west side of building.

Now click Add, our new PM should be named '[Ice Machine Weekly cleaning West](#),' it should include all of the items set from the original.

On the Connected tab we only need to connect the ice machines on the West side of the building.

Let us make one more change to each PM.

On the '[East](#)' let us make sure our start date is set to the next Monday date. Set the frequency to Every 4 weeks.

On the '[West](#)' one set the start date to the next Thursday date. Set the frequency to Every 4 weeks.

What happens?

We get all the East Ice machines every week on Monday. All the West Ice machines every week on Thursday. This gives our engineer time to get done with the East tower and then work on the West tower.

Guest rooms Inspections

1 PM for all

Again, to make things easy for setup purposes, we will set up 1 PM that will manage all the Guest Room Inspections. This PM will occur semiannually. Each Guest Room will get separate WR for tracking purposes. The initially generated WR dates will be based on our start date, subsequent ones will be based on when the room is completed (sliding mode).

Click Add on the PM Schedules page.

Fill in the following fields:

Work Definition:

Schedule name: '[Room Inspections](#).' This can be anything that makes sense to you. We do not have to put the Semiannual in the name as that will be noted by the frequency.

Schedule Type: Rooms. Guest rooms are defined under the Setup / Locations list.

Details: Select an Inspection. See Setup Inspections for details. We will assume this inspection is done correctly so most of the other fields are now also filled in.

Assigned to: We will leave this blank here and then when the WR generates we can assign them to one of our two Room PM engineers. We could fill in one of our engineer's names here and just change the other when they generate also.

ECT: How long does it take to do this? WR will have this so we can see how much work our engineers must do, and the PM Calendar will use this in its calculation of labor time needed to complete PM's.

Questions:

This will be filled in based on what Inspection we selected.

Schedule

Schedule Mode: Sliding. See the details of this later in this chapter.

PM Generation Options:

Frequency: Semiannual

Start Date: Dec 5, 2014. You can set this for today or tomorrow or what works best for you.

Remember once you set this and connect items and this date comes due PM's will generate.

Start Time: 4:00AM

Connection

Connect all the [Guest Rooms](#) regardless of where they are.

What happens?

All the Guest Rooms generate the initial time based on start date and time. They are possibly not assigned to the correct engineer, so we must update the individual PM/WR. Subsequent times they will generate based on the frequency and the last completed time. PM on Demand is a great tool to see next due. Also, if a room is due tomorrow and is not occupied today you can force it to generate through PM on Demand.

Split PMs per Engineer.

Now let us break this PM into two also. This will help as we will not have to reassign the PM/WR after they generate.

On the original PM Change the title to '[Room Inspections East](#), also go to the Connected tab and remove the guest rooms that are on the west side of building.

Now click Add, our new PM should be named '[Room Inspections West](#),' it should include all of the Guest Rooms on the west.

What happens?

All the Guest Rooms generate the initial time based on start date and time. They are assigned to the engineers. Subsequent times they will generate based on the frequency and the last completed time. PM on Demand is a great tool to see next due. Also, if a room is due tomorrow and is not occupied today you can force it to generate through PM on Demand.

These scenarios show a bit of the flexibility you have in **SynergyMMS** setting up PM's. There are many other ways that may fit better for your property.

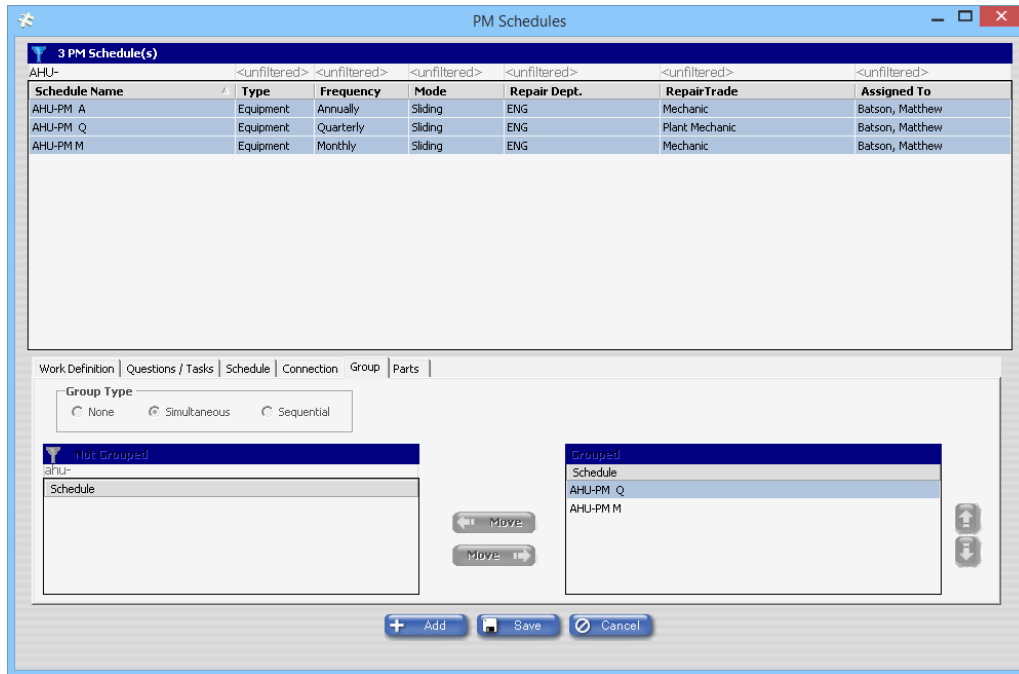
If you had an outside vendor build your PM's, make sure they fit how your property works. You may also have PM's setup that are done by outside contractors in **SynergyMMS** so that you can keep track of the data.

This allows SynergyMMS to be setup in an amazingly easy manner, or a property can also best fit the schedules for how the work is done.

SynergyMMS also allows PM's to be grouped and then generated at the same time (Simultaneous) or grouped and generated upon completion of the parent (Sequential).

Here is an example of grouping PM's.

Let us say we have an Annual, Quarterly, and Monthly AHU PM defined, since we have 10 in our sample building. We want the annual to be grouped to call the quarterly and the monthly at the same time – Simultaneous.



Another example would be on our Room Inspections done by Engineering. We want Housekeeping to follow them to do their part and finally tidy up the room. Group these PMs to occur upon completion - Sequential.

The PM Generator* in SynergyMMS monitors your PM Schedules on a daily or weekly basis (based on Setup/Preferences) and generates those needed based on a wide variety of factors. This is done automatically based on the criteria stipulated in each schedule. You can just set up the schedule and let SynergyMMS do the work of figuring out when a particular PM is due.

*The PM Generator is an additional program running on SynergyMMS servers. This program does not have an interface for users to interact with (server processing only).

Adding Preventive Maintenance Schedules

Adding PM Schedules is very straightforward and involves the following:

- Enter the Name of each PM Schedule.

- Describe the details of what is to be done on the question tab, or this may be done using a pre-existing Task Code or list of Inspection Questions. Including who and what department is responsible.
- Define the schedule meaning the Frequency of when the PM is to be performed.
- Select a Starting Date and time.
- Set the Schedule type and connect the PM Schedule to the appropriate pieces of Equipment or Locations.
- If applicable, group PM's.

PM Schedules

The PM Schedules form provides users a simple interface for detailing the work they wish to schedule. The form has two main sections: The PM Schedule List and the PM Details form. The PM Details form is further divided into six tabs of information for easy navigation: Work Definition, Questions/Tasks, Schedule, Connection, Groups, and Parts.

PM Schedule List

The screenshot shows the 'PM Schedules' window. At the top, there is a list of 13 PM Schedules with columns for Schedule Name, Type, Frequency, Mode, Child, Repair Dept., Repair Trade, Assigned To, and Connected. Below the list is a tabbed interface with tabs for Work Definition, Questions / Tasks, Schedule, Connection, Group, and Parts. The 'Schedule' tab is active, showing details for 'A-1 Engineering Room PM'. The details form includes fields for Schedule Name, Schedule Type (Equipment/Location), Issuing Dept., Repairing Dept., Trade, Assign To, Output To, Tower Location, In Rm Specific, Analysis, ECT (Estimated Completion Time), and Priority / Filter. At the bottom of the details form are three buttons: '+ Add', 'Save', and 'Cancel'.

Click on a tab to display more info

Creates new blank PM Schedule

Saves current PM Schedule

Cancels changes to Current PM Schedules

The PM Schedule List

The PM Schedule List displays all schedules accessible to the current logged in user. By default, the list is sorted alphabetically based on Schedule Name and contains basic information about each schedule. Clicking on a schedule in the list displays the detail information in the tabs below.

Allows filtering of the list when clicked

Number of active PMs appears in the Title bar

Sort the PMs by clicking in any column header. Click once for ascending, twice for descending.

Adjustable column widths

13 PM Schedule(s)								
Schedule Name	Type	Frequency	Mode	Child	Repair Dept.	RepairTrade	Assigned To	Connected
A-1 Engineering Room PM	Room	Daily	Regular		Engineering	None	None	487
A-1 Housekeeping Room PM	Room	Daily	Regular		Housekeeping	None	None	487
A-1 Painting PM	Room	Daily	Regular		None	None	None	487
AHU PM	Equipment	Quarterly	Sliding		Engineering	None	None	0
C19 Hourly Cleaning	Room	Daily	Absolute		None	None	None	1
ENG Guest Suite 2 Room Checklist	Room	Quarterly	Sliding		Engineering	None	None	26
ENG Single Guest Room Checklist	Room	Quarterly	Sliding		Engineering	None	None	0
GM Guest Suite 2 Room Checklist	Room	Annually	Sliding		Executive Office	None	None	0
GM Single Guest Room Checklist	Room	Annually	Sliding		Executive Office	None	None	0
Ice Machine Monthly	Equipment	Monthly	Regular		Engineering	None	None	4
Meter Reading	Equipment	Daily	Absolute		Engineering	None	None	3

The PM Schedule List

Selected PM highlighted

Scroll bar allows you to see all of the records

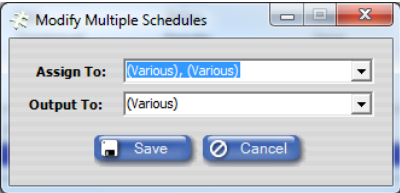
Filters

The filters allow for fast and simple filtering of the PM list. To turn on Filters, click the Funnel Icon in the PM List Title Bar. The Filter or search fields appear above each displayed column header.

Right-Click Menu

The Right-click Menu allows users to apply basic changes to any selected PMs. Right clicking a PM record in the list will display Edit and Delete. From the Edit menu you can do the following:

Select PM's by using the mouse to drag or use Ctrl and Shift and click.



The PM Work Definition Tab

The PM Work Definition Tab contains the basic information regarding the schedule type and repair information.

PM name appears in the Title Bar of each tab

Information on this portion of the form is often filled in by a specific Task Code

The PM Work Definition Tab

The fields of this form display the following information for the currently selected PM:

- **Schedule Name** – The title given to the currently selected PM Schedule. This title should be specific enough to describe the task, but not so much to be specific to a particular piece of equipment or location.

Examples:

- AHU Quarterly Filter Change vs. AHU1 Quarterly Filter Change
- Vehicle Oil Change vs. 2005 Ford Van Oil Change.
- Ice Machine Bleaching vs. 5th Floor Ice machine bleach job.

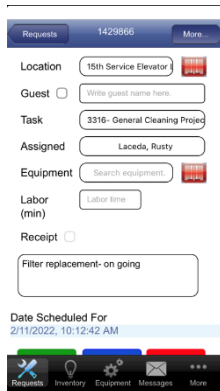
Notice that the second options are for a more specific piece of equipment, yet the first options do an excellent job at explaining the work to be done. You can make the PM Schedule names specific and only for one item, but that means the workload is higher to setup SynergyMMS.

- **Schedule Type** – The type is either Equipment or Location, this determines what items may be connected to the currently selected schedule when you get to the Connection tab.
- **Details** – Can be either Task Code or Inspection; the drop list will contain either Task Codes or Inspections depending on which option is selected and will automatically fill in many of the fields of the currently selected PM Schedule. You can also choose to not use a Task or Inspection and simply type in the work on the Question Tab.

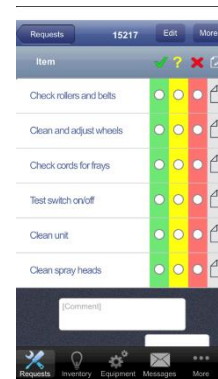
If you are considering using SynergyMMS for QA Inspections create inspections.

Inspections allow for check list when completing through the Synergy Mobile app vs a Task code will only be basic text in a paragraph style.

- A schedule must have a Task Code or Inspection or some text in the Questions / Task tab, to be valid and allow saving.



The picture on the right shows the app using an inspection. The picture on the left shows a basic task code or free form text.



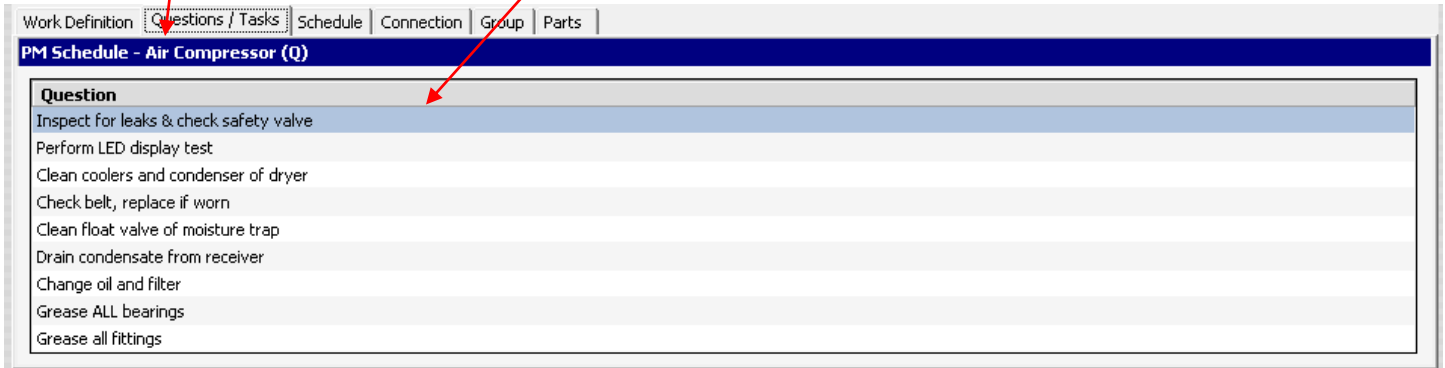
- **Note:** You can free form type a description, but some functions will not work as expected.
- **Issuing Dept** – The department responsible for editing and maintaining this PM Schedule. This becomes particularly important as you get more departments entering items into SynergyMMS for tracking.
- **Repairing Dept** – The department responsible for repairing the current task. Set based on the Task code or Inspection.
- **Trade** – The trade within the department responsible for repairing. Set based on the Task code or Inspection.
- **Assigned To** – The employee responsible for completing this PM. If many people could be assigned to do this type of work, then the assignment may be easier to do at the Calendar or WR level using the 'Apply Changes' option for groups of WR.
- **Output To** – Output Device to which Work Requests generated from this schedule will be delivered
 - If using a Task code, will be set based on what is defined in the Task Code
 - If using an Inspection, you will need to define this if not in Pooling mode.
 - If the property is set in Pooling Mode (see Preferences), this will say pooling for both Task and Inspection and cannot be altered at this point. Use PM Pools or alter the output in the WR once generated.
- **User Defined Fields** – These three fields are custom search fields to allow more grouping and filtering of the work once generated for custom views and reports. These are customizable in the Preferences.
- **Estimated Time** – The amount of time is displayed in days, hours, and minutes to indicate how much time the task is expected to take. Including this value here will allow the PM Calendar to show required labor hours.
 - If using a Task Code, this will be set based on what is defined in the Task Code.
 - If using an Inspection, you will need to define this.
 - **Priority/Filter** – The priority assigned to the WRs generated from this PM.
 - If using a Task code, this will be set by what is defined in the Task Code.
 - If using an Inspection, you will need to define this.

The PM Questions/Tasks Tab

The PM Questions/Tasks Tab contains the description of work or list of questions which will appear in WRs generated by this PM.

PM name appears in the Title Bar of each tab

Displays Task Code or Inspection items (non-editable, grey text) as well as additional Comments (editable, black text)



The PM Questions/Tasks Tab

The fields of this form display the following information for the currently selected PM:

- Questions / Task –
- If a Task code is used this field will display Description and will display both the non-editable Task Code Description (appearing in grey text) as well as any editable comments (displayed in black text) that you have added.
- If an Inspection is used this field will display Questions and will contain the defined list of questions for the inspection. No additional text can be added at this point.

The PM Schedule Tab

The PM Schedule Tab contains information regarding the frequency of when the PM is to take place.

Determines how PM will be generated. See below.

If Hourly set for repeat every X hour(s).

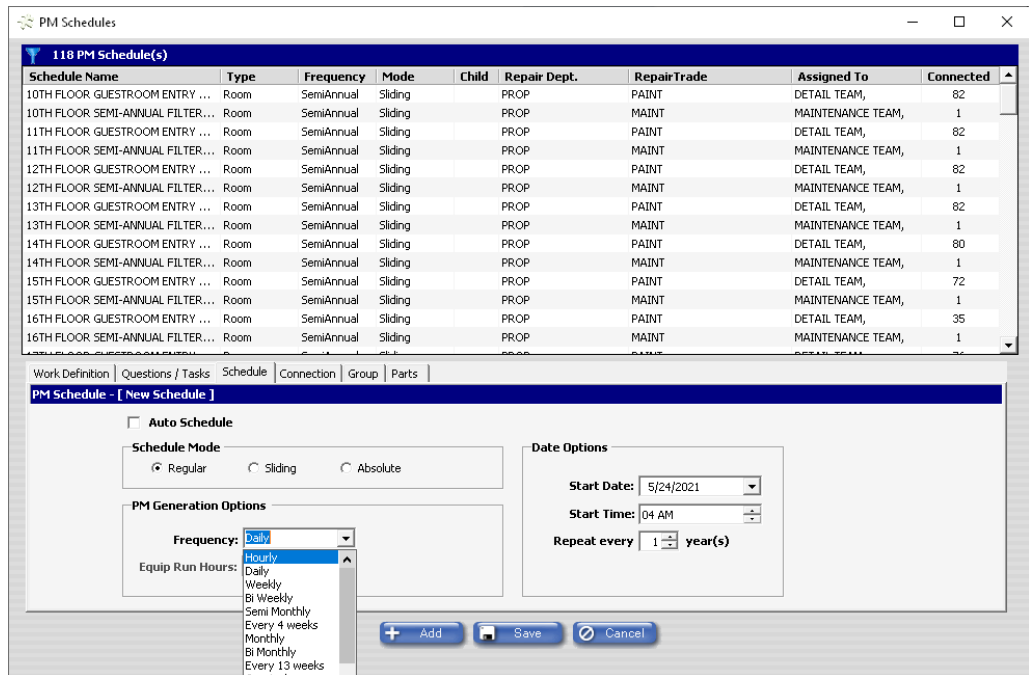
Available if this is a Room PM and the property has an active PMS, if this is an Equipment PM only functional when using SAI's CONTROLIQ Energy Management software.

The PM Schedule Tab

The fields of this form display the following information for the currently selected PM:

- **Reset** – Allows you to reset for a new start-date or frequency. This restarts a PM based on the new date as if a new schedule had been added.
- **Auto Schedule** – Check this box to have SynergyMMS calculate the distribution of PM Work Requests based on Frequency and number of Connected items. Not available for Sliding. The Auto Schedule option will schedule the work to best fit the maintenance schedules of other items. By placing a check mark in this box, any overlapping in scheduling can be eliminated.
 - Examples:
 - If you connect 4 items to a PM that has a monthly frequency. SynergyMMS will generate one per week. Most months have 4 weeks.
 - If you have 12 items connected to a PM that has an annual frequency, you will get one per month. There are 12 months in a year.
 - **Schedule Mode** – Determines how SynergyMMS will generate the Schedules. Regular is the default. This is another area that allows flexibility in the setup of the PM's.
- **Regular** – WR are generated based on the Start date and the Frequency. If an existing WR exists for the PM, a new WR/PM will not be generated until the original is completed and the due date comes due.
- **Example:** PM is scheduled for monthly and generated on August 8, and was not yet completed by September 8th, then no other WR/PM's will generate. If the WR is completed before September 8th the next WR/PM will generate.

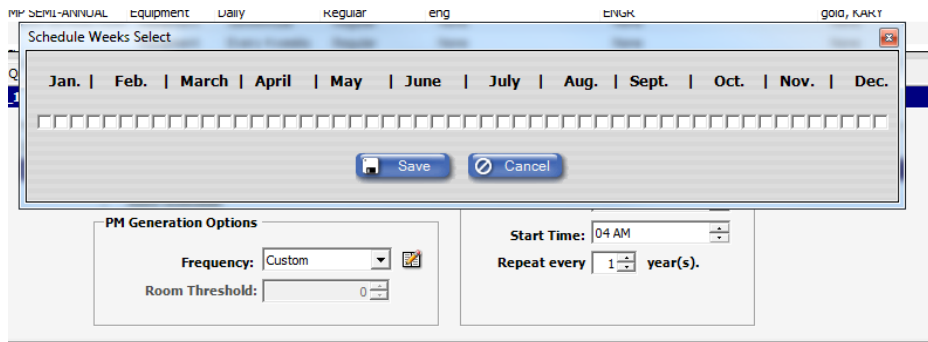
- **Absolute** – WR are generated based on the Start date and frequency. Absolute PMs generate regardless of whether there is an open incomplete WR/PM for the same PM.
- **Example:** PM is scheduled for monthly and generated August 8. Regardless of the status of this WR/PM, every month on the 8th a new WR/PM will generate.
- **Sliding** – WR are generated based on the Start date and the Frequency, like with Regular. However, subsequent WR are generated based on the Completed date of the previous WR/PM. Sliding mode allows for Schedules to be generated based on when the PM was last completed.
 - The 'Consecutive Nights Vacant' field is now enabled when the schedule mode is Sliding.
 - If a PM Schedule with a Consecutive Nights Vacant is set to 3, any room with the last check date equal or greater than 3 will automatically generate a PM for those locations.
- **Example:** PM is scheduled for monthly and generated August 1st but not completed until the 8th of the month, it will not be generated again until the 8th of the next month, even if the PM was saved with a start date of the 1st of the month. If the WR/PM was not completed, a new WR/PM will not generate.
 - **PM Generation Options** – Determines how often the PM will generate.
- **Frequency** – The recurring time between PMs, determines the number of times during the year the currently selected PM will generate.
 - Along with basic calendar frequencies, SynergyMMS also offers customized Weekly that fall on the same day, as well as Hourly that can be setup to repeat every X hour(s).



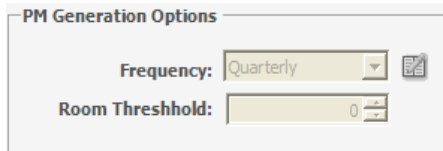
- **Run Hours Threshold** – Calculates the PM's based on the number of hours a piece of equipment operates, or number of sales a room has.
 - If you want your PM's to always generate on a specific day, use the frequency's defined by the weeks. Example Every 4 Weeks, Every 13 Weeks.
- **Custom option** - This Frequency allows you to choose when the PM should generate. It allows you to set a frequency that does not fit one of our predefined. When click you will get a 52-week calendar that you can check mark the weeks you want to do the PM.

- This is a great tool if you want to do something every week during a particular season only.
- **Note:** The custom frequency is not available in the sliding schedule mode.

SynergyMMS also offers a Custom frequency. If using the custom frequency, you must ensure that you click in one of the boxes otherwise the PM is not ‘enabled.’ Also, if using “custom,” make sure that your start date is before your first check mark. Good rule of thumb if using custom would be to set the start date to Jan 1.



- **Equipment Run Hours** – This feature is only functional if your property is also using SAI’s CONTROLIQ Energy Management Software (*contact SAI or your Vendor for details*). This allows you to schedule PMs based on hours of use. Use this with the sliding schedule mode.
- **Room Threshold** – This feature works with an active PMS interface (*Contact SAI or your Vendor for details*). This allows you to schedule PMs based on nights occupied. Use this with the sliding schedule mode to do based on which occurs first.
- **Note:** SynergyMMS uses an occupancy count that is tracked per room in the database. SynergyMMS does not evaluate current occupancy when generating the PM.



- **Date Options** – Determines when the PM will begin generating into Work Requests.
 - **Start Date** – The date on which the currently selected PM is scheduled to begin generating.
 - **Start Time** – The time of day the PM will generate or be scheduled for.
 - **Example:** Let us say you have an inspection that needs to happen each shift. You would define 3 PM schedules that are the same but have different start times, and names.
 - Morning Pool Inspection
 - Afternoon Pool Inspection
 - Evening Pool Inspection
 - Repeat every X year(s) – Defaults to 1 but can be changed in the case of not wanting the PM to repeat every year.
 - **Note:** If you set the repeat every field to 0, SynergyMMS will only generate for a period of one year being the date start Year. The frequency will be followed but for one year only. So, if you need

to do something for a single year every month, your frequency will get set to monthly and your every X year(s) would get set to 0.

- **① Note:** Fire retardation test may not be necessary every year, so you can set it for every 2 years. So, if you need to do something quarterly ever 2 years, set the Frequency for Quarterly and every X year(s) to 2.

WR/PM Create vs Start dates

In the Setup / Preferences the property defines how often the PM Generator should run. The Options are Daily or Weekly. This will affect the Create and Schedule for Dates of the PM/WR.

Daily – PM/WR will generate daily based on their start date, time frequency and mode. All dates (Created, Started and Schedule For) will be set the same.

Weekly - PM/WRs will generate on the day of the week set in the preferences and then based on the start time of the PM Schedule.

- Created and Started dates will be relative to when it was generated.
- Schedule for will be the actual due, based on the PM schedules start date, time, frequency, and mode.

Example: The PMs are set in Preferences to generate weekly on Sunday. The PM Schedule Start Date is Jan 1, 2016 (Friday) at 10:00am. PM/WRs will generate on Sunday and have an open date of Sunday at 10:00am, and the PM/WRs will have a schedule for date of Jan 1, 2016 – (Friday) at 10:00am.

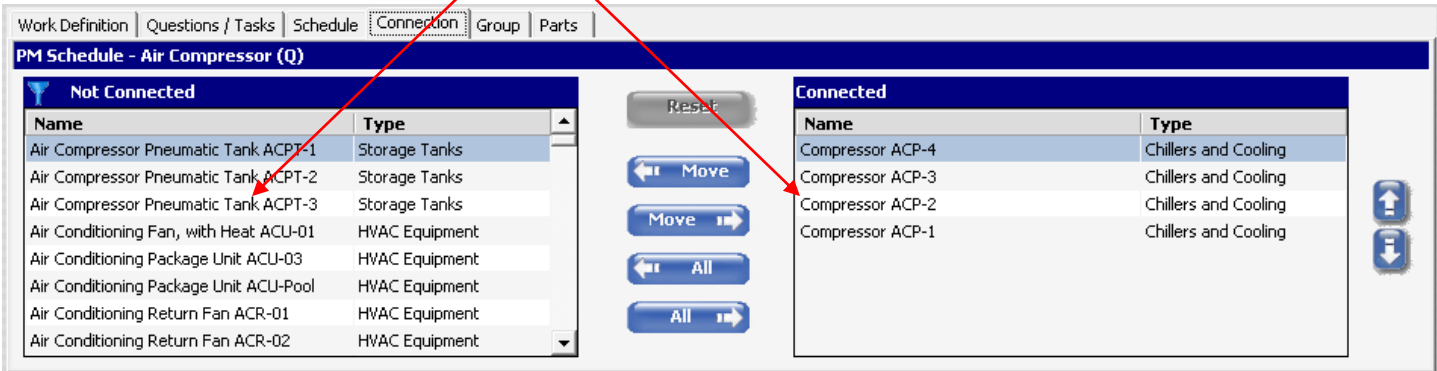
If the property is set up in the Preferences to generate Daily the PM/WRs will generate and be scheduled based on the date and time of the PM Schedule.

Example: The PM's set in Preferences to generate daily. The PM Schedule Start Date is Jan 1, 2015 (Thursday) at 10:00am. PM/WRs will generate on Thursday at 10:00am and have both an open and schedule for date of Jan 1, 2015 (Thursday) at 10:00am.


The PM Connection Tab

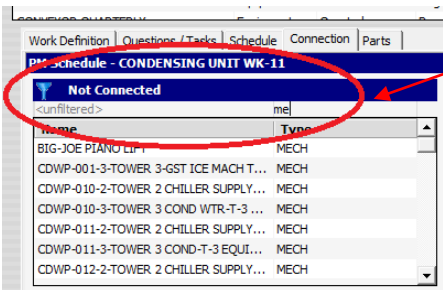
The PM Connection Tab displays the items, either Equipment or Locations, associated with this schedule. If you do not connect a piece of equipment or a location to a schedule, the schedule will not generate.


Displays Equipment or Room Names and respective Type. This is dependent on the Schedule Type set in the Work Definition tab of the PM. Schedule.



The PM Connection Tab

- **Reset** – This button allows you to modify connected items to ensure the generator is getting all the information.
- **Move / All** – Moves one item, a selected group, or all items in the list into the appropriate table.
-  - Allows you to force an order to the connected item. So that when they generate, they will be in a particular order. This is also handy if the property gets a new piece of equipment or wants to set the order for Room PMs after a renovation.



The filter is available here to filter equipment or locations by their type. Or simply click the Funnel icon,  to sort.

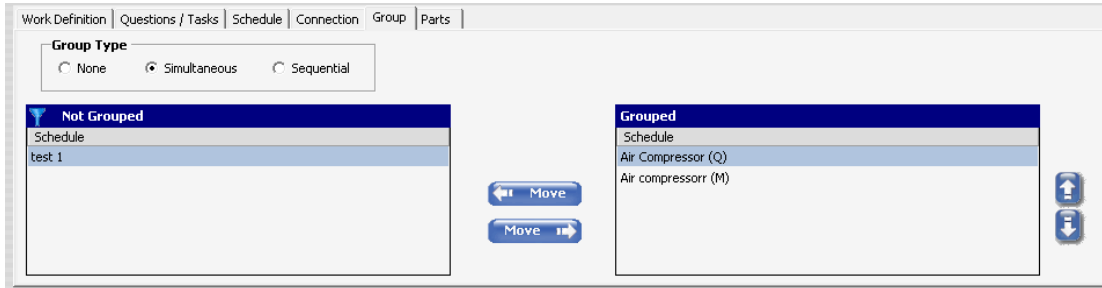
The Connection Tab is what allows SynergyMMS users to create only one PM for each type of task they wish to schedule.

Items of the appropriate (Locations or Equipment) type for the currently selected schedule can be moved into the connected list by clicking “Move” or “All.” When this PM is generated, a separate WR will be created for each connected item.

The Grouping Tab

The grouping tab allows PM’s to be grouped so that the parent PM can call the child PM in a sequential or simultaneous process.

Note: PM’s must be set in Sliding mode to be grouped.



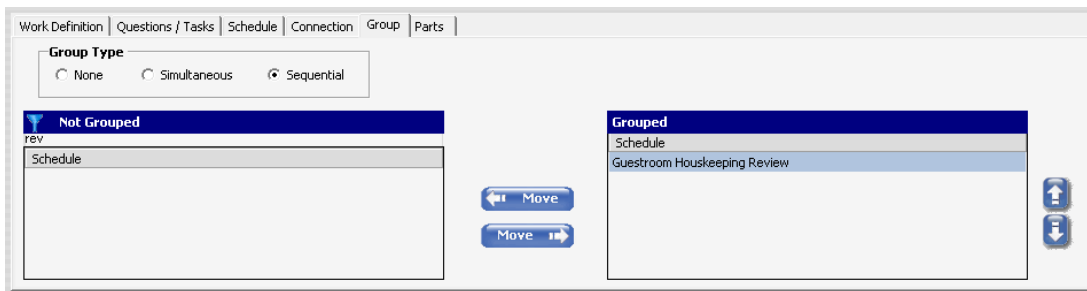
Simultaneous

PM/WR for child PM Schedules generate at the same time as the parent’s PMs. The initial generated PM/WR will be based off the parent’s Start date. Subsequently generated ones will be based on the child PM completion date and its frequency.

Example:

Parent Schedule	Children	Frequency	Start Date	1st Generate	2nd Generate	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th
AirCompressor Annually		Annual	1-Jan-15	1-Jan-15	1-Jan-16	1-Jan-17	1-Jan-18	1-Jan-19	1-Jan-20	1-Jan-21	1-Jan-22	1-Jan-23	1-Jan-24	1-Jan-25	1-Jan-26
	AirCompressor Quarterly	Quarterly	1-Apr-15	1-Jan-15	1-Apr-16	1-Jul-17	1-Oct-18	1-Jan-20	1-Apr-21	1-Jul-22	1-Oct-23	1-Jan-25	1-Apr-26	1-Jul-27	1-Oct-28
	AirCompressor Monthly	Monthly	1-Jan-15	1-Jan-15	1-Feb-16	1-Mar-17	1-Apr-18	1-May-19	1-Jun-20	1-Jul-21	1-Aug-22	1-Sep-23	1-Oct-24	1-Nov-25	1-Dec-26

Sequential



Sequential allows the child PMs to generate 1st upon completion of the parent.

First PM/WR generation is based on the parent’s completion date, the child will generate one day later / next day based on the parent’s start time. Subsequent PM/WR after the initial generated PM/WR will be based off the previous PMs in the sequence completion date.

If multiple children are grouped under a parent, and one of the child PM/WR takes longer (not completed) within the frequency of the parent, then any non-generated children will not generate in the sequence.

Example: AC Monthly PM grouped sequentially with 2 Child PM’s (AC Weekly filter / AC Weekly belts).

First off, the AC Monthly PM generates 9/1/2016, it is complete on 9/1/2016. Upon its completion 9/1/2016 the AC Weekly Filter PM generates 9/1/2016. This AC Weekly Filter PM is not completed until 10/5/2016.

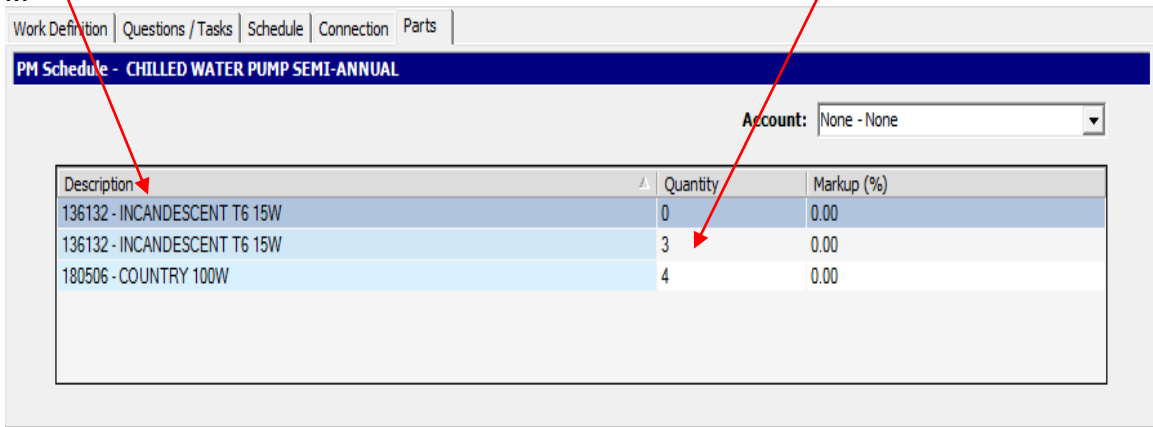
Grouping of PM's is only allowed if the Schedule Mode is set to Sliding. Further for grouping to be allowed if it is simultaneous the Frequency of the children must be equally divisible of the parent's frequency. Also, only items that are connected to both will generate.

The Parts Tab

The parts tab shows the parts that are needed for the PM Schedule.

Shows the parts that are needed in a PM

Shows the number of parts in Inventory

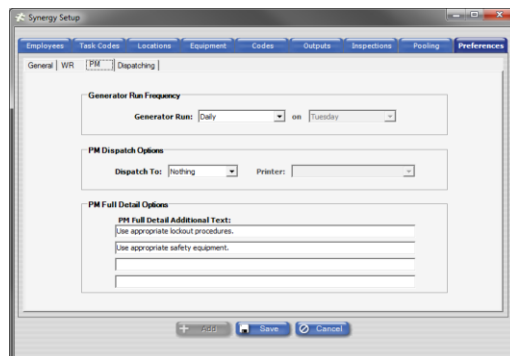


Note: Always be sure to save your work as you go. PMs require a lot of detail and may take some time to set up, but once they are set up, SynergyMMS will take care of issuing the WRs for each PM at its appropriate time. The SynergyMMS PM Generator runs in the background daily or weekly checking to see what PMs should be generated as WRs.

The PM Generator

The PM Generator is an application that runs on the SynergyMMS server daily it takes your PM Schedules and converts them into Work Requests. The PM Generator can be configured to run as you would like.

See the [Setup / Preferences](#) area for more information on the fields here.



The PM Generator will generate any PM's that are due based on Start Date, Frequency, and PM Mode. PMs with Starting Dates in the past will generate next time the frequency has cycled. PM's with Start Dates in the future will generate when their start date is reached.

PM on Demand

Often in dealing with Location PMs it is difficult to gain access during periods of high occupancy. When working with traditional PMs, as explained in the first part of this chapter, PMs may come due when the room is occupied. PM on Demand (PMoD) is designed to give users more control when scheduling their PMs.

PMoD still requires that users create schedules as outlined above. The exception to this is that now Locations or Equipment are not required to be connected to the schedule. The Connection aspect is what will be done manually through the process outlined here.

Menu Bar for more options

Location PM filters (Frequency, Repair Department and Repair Trade)

Room Occupancy Indicator if PMS interface in place.

Name	Type	Occ.	Name	Last Generated	Last Completed	Next Generated
798t	None		5p mattress			Not Connected
7th FLOOR	None		MOD walk thru			Not Connected
8000	Guest Room		Pool chems			Not Connected
8001	Guest Room		Room INSP (2)			6/21/2016 6:00 AM
8002	Guest Room		Room Insp. Long			6/23/2016 3:00 PM or 70 sells
8003	Guest Room		Room Inspection			Not Connected
8005	None		Room Inspections 2X			10/19/2016 8:00 AM
8006	Guest Room		Room Pm 1	2/4/2016 1:34 PM		WR #4664
8007	Guest Room		test 2			Not Connected
8th FLOOR	None		Test for translation			Not Connected
9876	None		Test for translation 1			Not Connected
Basement	Store Rooms		Weekly Sprinkler Test			Not Connected

Count of items in list. This screen also offers filtering to find data faster.

PM on Demand (default view by Locations)

Generating PMs on Demand

Generating PMs on Demand is a straightforward process:

1. Select appropriate view (see following sections for details on each of the various views)
2. Apply filters to the list on left side of form (optional)
3. Select item from list on left side of form
4. Select item(s) from list on right side of form. Multi-select allowed on the right list.
5. Click Generate button at bottom of form

OR

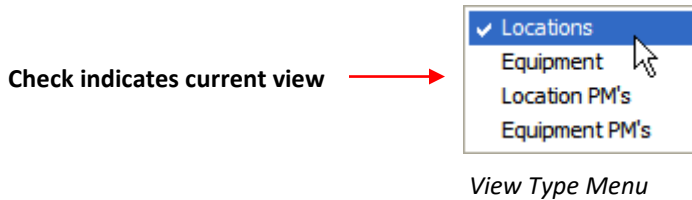
Click File on PMoD Menu Bar then click Generate from Option Menu

Note: Work Requests (WRs) generated from PMs will be found in the Work Request area of SynergyMMS along with WRs generated by other means, the guest's name will say PM Generator.

Note: SynergyMMS only sees WR as a PM/WR if generated from PM on Demand, or the PM Generator for reports. WR with user text typed into the Guest name of 'PM Generator' are not PM's to SynergyMMS.

View Options

When working with PMoD there are four views available. Each view will determine what items are presented in each of the two lists and define the three filters provided on the form. The left list is a single select list while the right list allows multiple selections, using the ctrl and shift keys. The **Locations** option is the default view when first opening PMoD. Views can be changed using the View Type Menu option on the PMoD Menu Bar.



Location View

Locations Filters: These filters affect the Locations list (shown in the left pane of the form):

- **Room Type** – Filters Locations based on the selected Type
- **Building** – Filters Locations based on selected Building
- **Floor** – Filters Locations based on selected Floor

The list on the left side of the PMoD form contains Locations and displays the following columns:

- **Name** – The name of the Location
- **Type** – The Room Type assigned to the Location
- **Occ.** – The Occupancy indicator of the Location – (🟢) indicates an Occupied Location; (🔴) indicates no current information; a blank indicates an Unoccupied Location

ⓘ Note: Occupancy information requires connection to data provided by a Property Management System (PMS). For more information on this connection please contact your vendor.

The list on the right of the PMoD form contains all the Location PMs available within SynergyMMS based on User Rights.

The Location PM list displays the following columns:

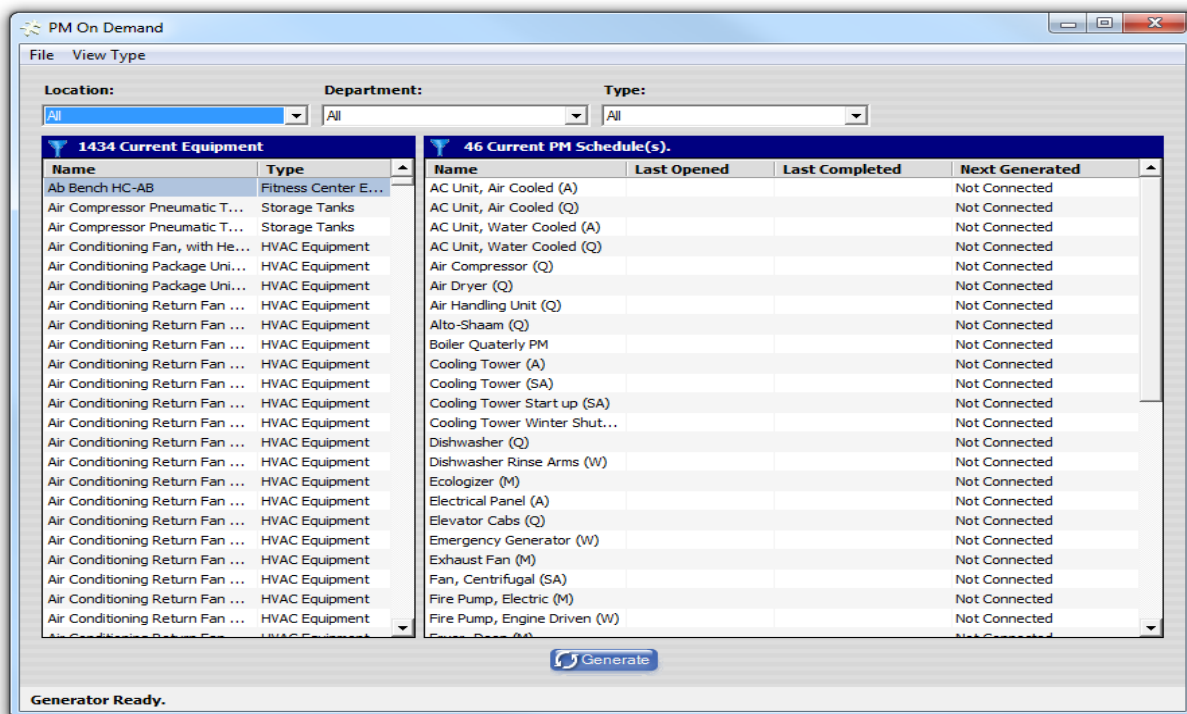
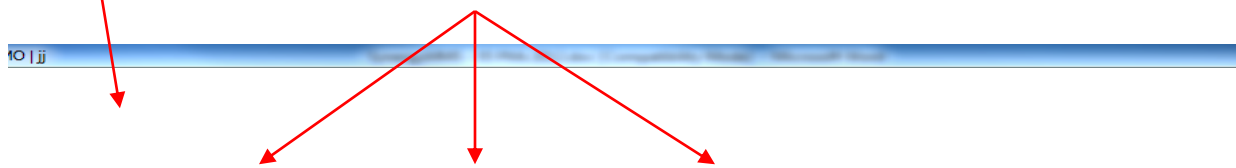
- **Name** – The Name of the Location PM Schedule
- **Last Generated** – The last date the PM was generated for the selected Location
- **Last Completed** – The last date the PM was completed for the selected Location
- **Next Generated** – Contains one of the following indicators – a *date* when the PM is next scheduled for the currently selected Location; a number indicator how many days the PM is *past due* to generate; or a WR number indicating that there is an open PM. PMs not connected to the selected Location display *Not Connected*

Equipment View

The **Equipment** option is the second view available in PMoD. Views can be changed using the View Type Menu option on the PMoD Menu Bar.

Change View here

Equipment filters (Location, Department and Type)



PM on Demand (view by Equipment)

These filters affect the Equipment list (shown in the left pane of the form):

- **Location** – Filters Equipment based on the selected Location
- **Department** – Filters Equipment based on selected Department
- **Type** – Filters Equipment based on selected Type

The list on the left side of the PMoD form contains Equipment and displays the following columns:

- **Name** – The name of the Equipment
- **Type** – The Type assigned to the Equipment

The list on the right of the PMoD form contains all the Equipment PMs available within SynergyMMS based on User Rights. The Equipment PM list displays the following columns:

- **Name** – The Name of the Equipment PM Schedule

- **Last Generated** – The last date the PM was generated for the selected Equipment
- **Last Completed** – The last date the PM was completed for the selected Equipment
- **Next Generate** – Contains one of the following indicators – a *date* when the PM is next scheduled for the currently selected Equipment; a number indicator how many days the PM is *past due* to generate; or a *WR* number indicating that there is an open PM. PMs not connected to the selected Equipment display as *Not Connected*.

Location PMs View

The **Location PMs** option is the third view available in PMoD. Views can be changed using the View Type Menu option on the PMoD Menu Bar.

Location PM filters (Frequency, Repair Department and Repair Trade)

The screenshot shows the 'PM On Demand - Locations' window. At the top, there are three dropdown filters: 'Room Type' (set to 'All'), 'Building' (set to 'All'), and 'Floor' (set to 'All'). Below these are two main data tables. The left table, titled '130 Current Location(s)', lists various rooms with columns for Name, Type, and Occ. The right table, titled '12 Current PM Schedule(s)', lists maintenance tasks with columns for Name, Last Generated, Last Completed, and Next Generated. A 'Generate' button is located at the bottom of the window.

Name	Type	Occ.
8002	Guest Room	
8003	Guest Room	
8005	None	
8006	Guest Room	
8007	Guest Room	
8th FLOOR	None	
9876	None	
Basement	Store Rooms	
BASEMENT1	None	
basement2	None	
BASEMENT3	None	
BASEMENT4	None	
CAFETERIA	None	
CAFETERIA KITCHEN	None	
CAPTOL CAFÉ	Public Spc	
CAPTOL CAFE KITCHEN	None	
CHILLER ROOM	None	
EAST BALL RM	Public Spc	
EXOFFICE	None	
Fire Drill	None	X
GARD MANGER	None	
GRAND BALL RM	Public Spc	

Name	Last Generated	Last Completed	Next Generated
flip mattress			Not Connected
MOD walk thru			Not Connected
Pool chems			Not Connected
Room INSP (2)			6/21/2016 6:00 AM
Room Insp. Long			6/23/2016 3:00 PM or 70 sells
Room Inspection			Not Connected
Room Inspections 2X			10/19/2016 8:00 AM
Room Pm1	2/4/2016 1:45 PM		WR#4665
test 2			Not Connected
Test for translation			Not Connected
Test for translation 1			Not Connected
Weekly Sprinkler Test			Not Connected

PM on Demand (view by Location PMs)

These filters affect the Location PM list (shown in the left pane of the form):

- **Frequency** – Filters Location PMs based on the selected Frequency
- **Repair Department** – Filters Location PMs based on the selected Repair Department
- **Repair Trade** – Filters Location PMs based on the selected Repair Trade

The list on the left side of the PMoD form contains Equipment and displays the following column:

- **Name** – The name of the Location PM

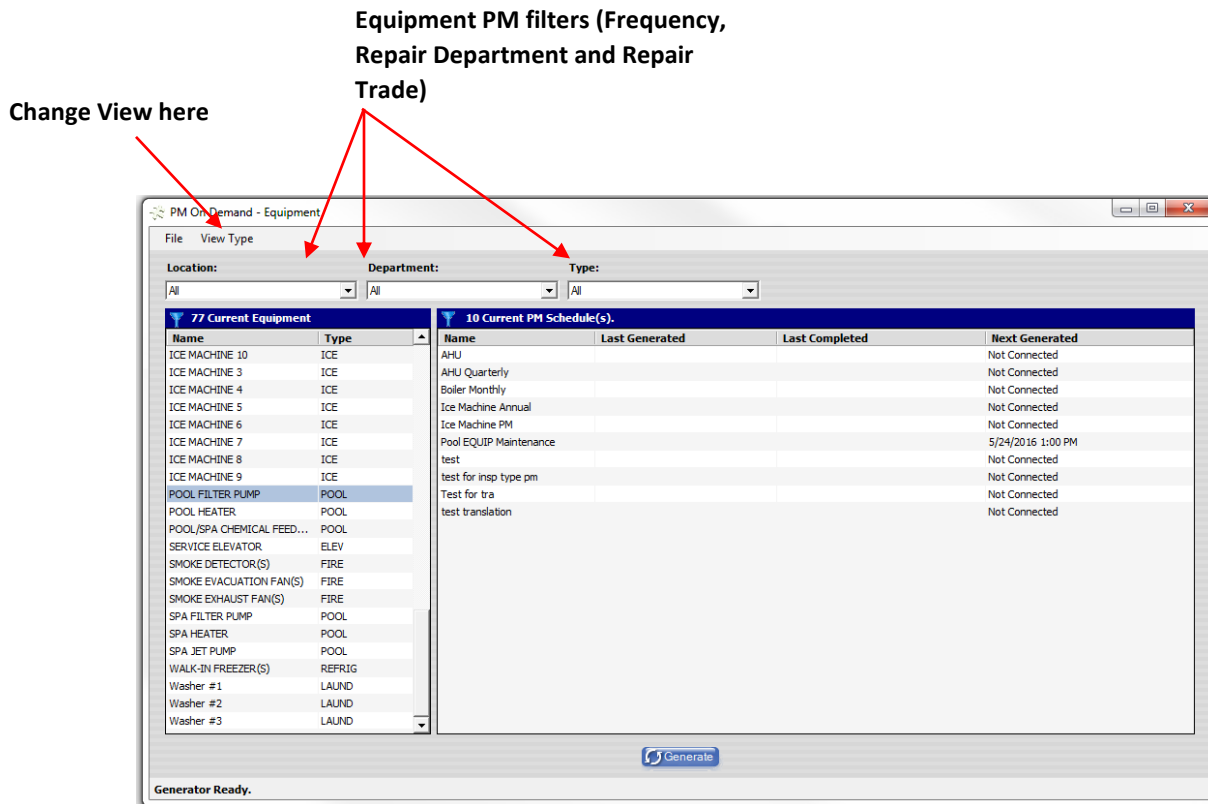
The list on the right of the PMoD form contains all the Locations available within SynergyMMS. The Locations list displays the following columns:

- **Name** – The Name of the Location
- **Last Generated** – The last date the PM was generated for the selected Location
- **Last Completed** – The last date the PM was completed for the selected Location
- **Next Generate** – Contains one of the following indicators – a *date* when the PM is next scheduled for the currently selected Location; an indicator how many days the PM is *past due* to generate; PMs not connected to the selected Location display as *Not Connected*.
- **Count** – Shows the number of times that a PM has been completed in the last 365 days for the location and PM.
- **Score** – Shows the current room grade. This is based on the grades of all open WR in this location subtracted from the overall grade assigned to the room in setup.
- **WR's** – Shows the number of current open WR for that room. Includes both regular and PM work.
- **Occ.** – The Occupancy indicator of the Location – (👤) indicates an Occupied Location; (✖) indicates no current information; a blank indicates an Unoccupied Location.

ⓘ **Note:** Occupancy information requires connection to data provided by the Property Management System. For more information on this connection please contact Systems Associates, Inc.

Equipment PMs View

The **Equipment PMs** option is the final view available in PMoD. Views can be changed using the View Type Menu option on the PMoD Menu Bar.



PM on Demand (view by Equipment PMs)

These filters affect the Equipment PM list (shown in the left pane of the form):

- **Frequency** – Filters Equipment PMs based on the selected Frequency
- **Repair Department** – Filters Equipment PMs based on the selected Repair Department
- **Repair Trade** – Filters Equipment PMs based on the selected Repair Trade

The list on the left side of the PMoD form contains Equipment and displays the following column:

- **Name** – The name of the Equipment PM

The list on the right of the PMoD form contains all the Equipment available within SynergyMMS based on User Rights.

The Equipment list displays the following columns:

- **Name** – The Name of the Equipment
- **Last Generated** – The last date the PM was generated for the selected Equipment
- **Last Completed** – The last date the PM was completed for the selected Equipment
- **Next Generate** – Contains one of the following indicators – a *date* when the PM is next scheduled for the currently selected Equipment; an indicator how many days the PM is *past due* to generate; PMs not connected to the selected Equipment display as *Not Connected*.

PM Calendar

The calendar view in SynergyMMS Preventive Maintenance area, offers both an Annual and Monthly view to see how well the PM’s have been balanced, and to allow for forecast of hours to be worked.

There is also a Daily view that allows for changes to be made to future instances of a PM/WR such as to whom they are assigned or whether they should be generated.

Example: If you have two employees that do all of your room inspections, and employee 1 is going on vacation for two weeks, during this vacation, you want the PMs to generate with employee 2’s name. The Calendar / Daily view will allow this to occur without having to change the original PM. Simply select all of employee 1’s PMs and edit the “Assigned To”.

WR #	Item	Schedule Name	Description	Frequency	Schedule Date	Schedule Start Time	Altered Date	Status	Assigned To	ECT	Priority
1006	Pool	Pool chems	Check pool chemical levels	Once a day	5/17/2016	04:00:00		None	None,	0d 00:15	99
1005	Pool	Pool chems	Check pool chemical levels	Once a day	5/17/2016	04:00:00		None	None,	0d 00:15	99
1003	Pool	Pool chems	Check pool chemical levels	Once a day	5/17/2016	04:00:00		None	None,	0d 00:15	99
1002	Pool	Pool chems	Check pool chemical levels	Once a day	5/17/2016	04:00:00		None	None,	0d 00:15	99
8006	ICE MACHINE 9	Pool EQUIP Maintenance		Every Month	5/17/2016	13:00:00		None	None,	2d 00:00	99
1005	POOL FILTER PUMP	Pool EQUIP Maintenance		Every Month	5/17/2016	13:00:00		None	None,	2d 00:00	99
1008	POOL HEATER	Pool EQUIP Maintenance		Every Month	5/17/2016	13:00:00		None	None,	2d 00:00	99
1006	Room	Room INSP (2)		Three Times a Year	5/17/2016	06:00:00		None	None,	0d 00:15	99
1007	Room	Room Inspection		Four Times Per Year	5/17/2016	04:00:00		Arnold, Megan	Arnold, Megan	0d 00:15	99
1006	Room	Room Inspection		Four Times Per Year	5/17/2016	04:00:00		Arnold, Megan	Arnold, Megan	0d 00:15	99
1007	Room	Room Inspection		Four Times Per Year	5/17/2016	04:00:00		Arnold, Megan	Arnold, Megan	0d 00:15	99
1008	Room	Room Inspection		Four Times Per Year	5/17/2016	04:00:00		Arnold, Megan	Arnold, Megan	0d 00:15	99
	Air Handler #24	test for insp type pm		Every Month	5/17/2016	04:00:00		None	None,	0d 00:25	99
	HTE-L2 DRINKING FOUNTAIN	test translation		Once a day	5/17/2016	15:00:00		None	Baru, Madhav	0d 00:25	99

Example: If you have some PM’s that, due to a conference being hosted at the property, will not be able to be completed, the Calendar / Daily view will allow you to delete or move these instances to a better time.

The Annual and Monthly views, show the total hours and number of PM tasks forecasted. There are arrow buttons on the corners of the view that bring up the previous or next month/year data for ease of navigation.

The total labor hours shown here can be used to calculate needed labor force.

Year: 2016 Total: 3424 PM's / 33938.12 Hours			
January, 2016	February, 2016	March, 2016	April, 2016

Double-clicking on a month in the Annual view will display a detail of that month. From this view the details of a single day are displayed by double-clicking on a single date.

Filters – Allow you to easily get a snapshot of what is forecast for specific items.

Annual View

The annual view shows break down by month.

Depending on whether you are viewing by year or month, the quantity and hours will reflect your selection.

Year: 2017 Total: 4853 PM's / 53270.99 Hours			
January, 2017	February, 2017	March, 2017	April, 2017
Equip: 179 / 3833.34 Room: 195 / 56.62 Total: 374 / 3889.96	Equip: 149 / 3828.08 Room: 271 / 2283.62 Total: 420 / 6111.7	Equip: 151 / 3805.34 Room: 234 / 69.13 Total: 385 / 3874.47	Equip: 175 / 3760.92 Room: 288 / 145.12 Total: 463 / 3906.04
May, 2017	June, 2017	July, 2017	August, 2017
Equip: 151 / 3805.34 Room: 204 / 59.62 Total: 355 / 3864.96	Equip: 150 / 3804.92 Room: 296 / 2290.38 Total: 446 / 6095.3	Equip: 179 / 3833.34 Room: 206 / 59.37 Total: 385 / 3892.71	Equip: 152 / 3829.34 Room: 215 / 62.37 Total: 367 / 3891.71
September, 2017	October, 2017	November, 2017	December, 2017
Equip: 150 / 3804.92 Room: 227 / 68.5 Total: 377 / 3873.42	Equip: 176 / 3761.34 Room: 363 / 2371.87 Total: 539 / 6133.21	Equip: 150 / 3804.92 Room: 211 / 61.37 Total: 361 / 3866.29	Equip: 151 / 3805.34 Room: 230 / 65.88 Total: 381 / 3871.22

Monthly View

Tab to easily allow for switching between the Year view and the Month view.

The Monthly view shows break down by day.

January, 2017 Total: 374 PM's / 3889.96 Hours						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1 Equip: 5 / 144.84 Room: 6 / 1.5 Total: 11 / 146.34	2 Equip: 5 / 120.84 Room: 6 / 1.5 Total: 11 / 122.34	3 Equip: 5 / 144.84 Room: 6 / 1.5 Total: 11 / 146.34	4 Equip: 5 / 144.84 Room: 7 / 2.5 Total: 12 / 147.34	5 Equip: 5 / 144.84 Room: 6 / 1.5 Total: 11 / 146.34	6 Equip: 4 / 96.84 Room: 6 / 1.5 Total: 10 / 98.34	7 Equip: 5 / 144.84 Room: 6 / 1.5 Total: 11 / 146.34
8 Equip: 6 / 168.84 Room: 7 / 1.75 Total: 13 / 170.59	9 Equip: 4 / 96.84 Room: 6 / 1.5 Total: 10 / 98.34	10 Equip: 5 / 144.84 Room: 6 / 1.5 Total: 11 / 146.34	11 Equip: 6 / 145.26 Room: 7 / 2.5 Total: 13 / 147.76	12 Equip: 11 / 106.15 Room: 6 / 1.5 Total: 17 / 107.65	13 Equip: 5 / 144.84 Room: 6 / 1.5 Total: 11 / 146.34	14 Equip: 7 / 169.59 Room: 6 / 1.5 Total: 13 / 171.09
15 Equip: 5 / 144.84 Room: 6 / 1.5 Total: 11 / 146.34	16 Equip: 4 / 96.84 Room: 6 / 1.5 Total: 10 / 98.34	17 Equip: 5 / 144.84 Room: 6 / 1.5 Total: 11 / 146.34	18 Equip: 5 / 144.84 Room: 11 / 6.5 Total: 16 / 151.34	19 Equip: 4 / 96.84 Room: 6 / 1.5 Total: 10 / 98.34	20 Equip: 6 / 168.84 Room: 17 / 6.12 Total: 23 / 174.96	21 Equip: 6 / 146.17 Room: 5 / 1.25 Total: 11 / 147.42
22 Equip: 3 / 48.84 Room: 5 / 1.25 Total: 8 / 50.09	23 Equip: 1 / 0.42 Room: 5 / 1.25 Total: 6 / 1.67	24 Equip: 3 / 96.42 Room: 5 / 1.25 Total: 8 / 97.67	25 Equip: 5 / 144.84 Room: 6 / 2.25 Total: 11 / 147.09	26 Equip: 5 / 120.84 Room: 5 / 1.25 Total: 10 / 122.09	27 Equip: 33 / 172.84 Room: 5 / 1.25 Total: 38 / 174.09	28 Equip: 5 / 144.84 Room: 5 / 1.25 Total: 10 / 146.09
29 Equip: 5 / 97.59 Room: 5 / 1.25 Total: 10 / 98.84	30 Equip: 5 / 144.84 Room: 5 / 1.25 Total: 10 / 98.84	31 Equip: 1 / 0.42 Room: 5 / 1.25 Total: 6 / 1.67	1	2	3	4
5	6	7	8	9	10	11

WR #	Item	Schedule Name	Description	Frequency	Schedule Date	Schedule Start Time	Altered Date	Status	Assigned To	ECT
CT-28-3	COOLING TOWER	COOLING TOWER MONTHLY		Every Month	8/15/2012	04:00:00			Koons, JOHN	04:00:00
CT-28-3	COOLING TOWER	COOLING TOWER MONTHLY		Every Month	8/15/2012	04:00:00			Koons, JOHN	04:00:00
CT-28-3	COOLING TOWER	COOLING TOWER MONTHLY		Every Month	8/15/2012	04:00:00			Koons, JOHN	04:00:00
CT-28-3	COOLING TOWER	COOLING TOWER MONTHLY		Every Month	8/15/2012	04:00:00			Koons, JOHN	04:00:00
AK4891-2-1	GRABASE TRAP WEEKLY			Once Per Week	8/15/2012	04:00:00	8/14/2012		None, JOHN	04:00:00
122-002-1-3-ICE MACHINE	Ice Machine - Semi Annual		1. Turn off power to ice machine...	Every Month	8/15/2012	04:00:00			None	04:00:00
AK0-009	Items test			Once a day	8/15/2012	04:00:00			None	04:00:15
AK0-10	Items test			Once a day	8/15/2012	04:00:00			None	04:00:15
AK4891-2-1	Items test			Once a day	8/15/2012	04:00:00			None	04:00:15
1781-17	Item PM_DAP	Testing.....		Once a day	8/15/2012	13:00:00			None	04:00:00
AK0-10	RESTROOMS - PUBLIC	PUBLIC RESTROOM QUARTERS MAINT.		Once a day	8/15/2012	04:00:00			Hayes, RANDY	04:00:00
1-2077	ROOMS PM			Once a day	8/15/2012	04:00:00			None	04:00:00
3-482	ROOMS PM	work, work, work		Once a day	8/15/2012	04:00:00			user, user	04:00:00
SCAF-1-3	SCAFFOLD MONTHLY			Every Month	8/15/2012	04:00:00			charles, TSH	04:00:00
SCAF-1-4	SCAFFOLD MONTHLY			Every Month	8/15/2012	04:00:00			charles, TSH	04:00:00
SCAF-2-3	SCAFFOLD MONTHLY			Every Month	8/15/2012	04:00:00			charles, TSH	04:00:00
AK0-007	test			Once a day	8/15/2012	04:00:00			None	04:00:00
AK1-008-3-VALET SHOP A/C UNIT	test			Once a day	8/15/2012	04:00:00			None	04:00:00
AK0-009	test			Once a day	8/15/2012	04:00:00			None	04:00:00
AK0-10	test			Once a day	8/15/2012	04:00:00			None	04:00:00
AK0-009	test 2			Once a day	8/15/2012	04:00:00			laker, EARNEST	04:00:00
AK0-10	test 2			Once a day	8/15/2012	04:00:00			laker, EARNEST	04:00:00
AK0-10	test 3			Once a day	8/15/2012	04:00:00			None	04:00:00

Modified PM/WR will display with an “Altered Date,” and the changes will show.

Selecting an instance of the PM/WR and right-clicking will display the edit box (as seen to the left of this text).

The “Assigned To” and “Scheduled for Date” fields can be modified. There are rules for the edits that are allowed (see **Rules for editing an instance of a PM/WR**).

Notice that when an instance is changed, SynergyMMS displays the date the change was made. This change does not affect the original PM Schedule, only this instance of what will generate this one time for the PM/WR.

Example: If you delete a forecasted PM/WR that is due the 10th of this month, the PM Schedule will still generate a new instance of that PM/WR for the appropriate date next month.

PM/WR that have already generated will show the WR number. In the case where the WR has already generated editing must take place in the Work Request view.

The calendar is a great tool for understanding the impact of the PM forecast on your property and your staff. It is an excellent way to modify PM/WR due to vacation/sick time, or high occupancy and can also be used to forecast staffing and inventory requirements in support of the PM program.

Rules for editing an instance of a PM/WR:

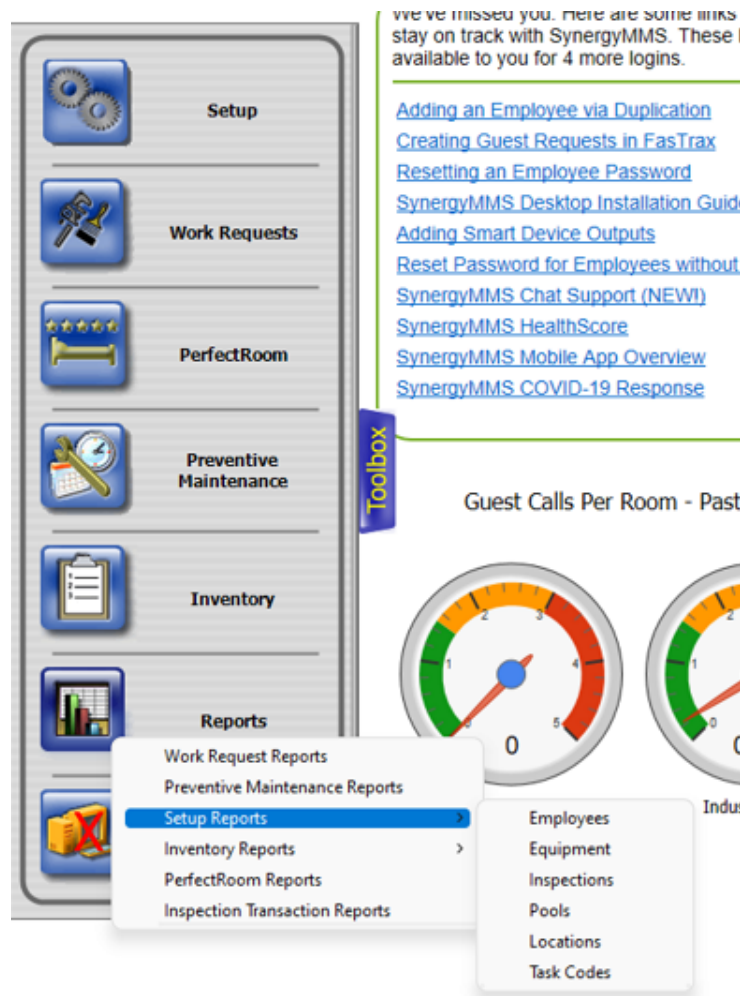
- No ‘backward’ movement – Since the PM Calendar deals with forecasted PM’s, an instance cannot be rescheduled prior to the current day.
- Multi-select of PM/WR instances on the Daily PM view will not allow changes to the “Scheduled for Date.”
- Multi-select of PM/WR instances on the Daily PM view will allow changes to “Assigned To” employee.
- Sliding Mode PM’s “Scheduled for Date” cannot be modified; only Assigned To employee may be changed.
- Regular or Absolute PMs allow for “Scheduled for Date” changes within their frequency on single select.
 - The schedule cannot be Auto Schedule.
- Changing a single PM instance through the Daily PM interface will not affect future generation of the schedule.
- If a forecasted instance of a PM/WR is deleted, there is a record added to the transactions table for tracking if needed.

The PM Calendar offers a control over the property’s Preventive Maintenance in SynergyMMS.

Chapter 6 SynergyMMS: Reports

Reports allow users to analyze and display the data that has been entered into **SynergyMMS** in a variety of formats. Each area of **SynergyMMS** offers corresponding reports that can be filtered in numerous ways. The look of the report is configured in the Report Settings. The displayed report contains many tools to help integrate and export the data. **SynergyMMS** also allows users to save defined reports as Favorites and then set those Favorites to be emailed to specifically selected individuals on a customizable schedule.

To access Reports, click the **Toolbox** and select **Reports**. A menu will display showing the different areas of reports available (based on user rights).



Reports Menu with Setup reports displayed

Reports are divided into the following areas: *Work Request, Preventive Maintenance, Setup, and Inventory*. The Setup Reports are further divided into the following areas: *Employees, Equipment, Inspections, Pools, Rooms, and Task Codes*.

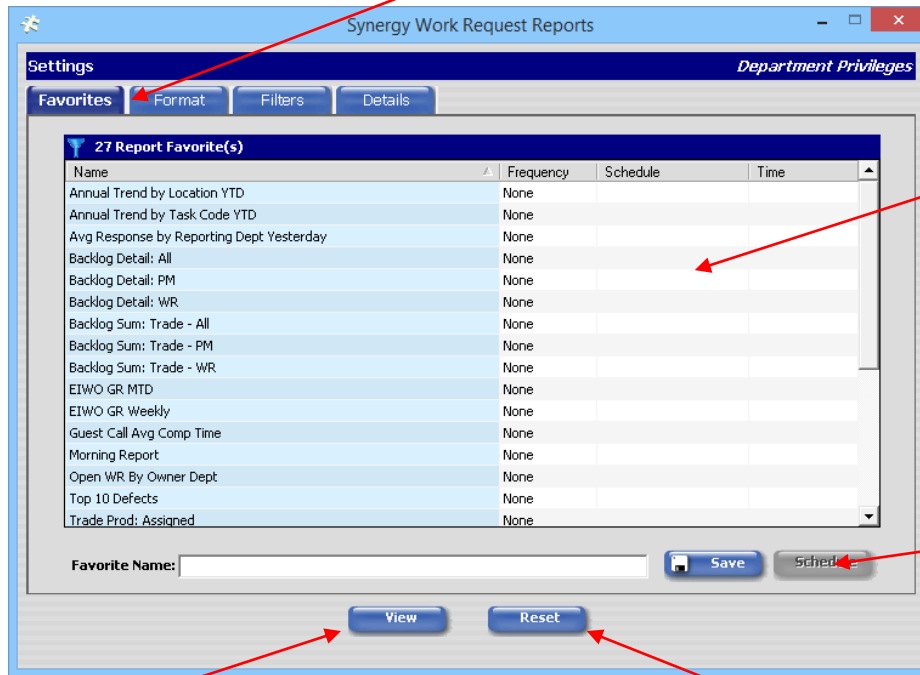
Report Settings

The Reports Settings display is made up of four tabs: *Favorites, Format, Filters, and Details*. Each tab contains controls that allow users to customize Favorites, select filters and sort the information to be displayed.

Favorites

The Report Favorites Tab is always the first to display, even if no Favorites are available. This tab allows users to quickly select a report Favorite for viewing or save a Favorite of their own.

Using Favorites can save time.
Favorites are user specific.



Report Email Schedules

Schedule an Emailed Report

View a Preview of Report

The Report Favorite Tab

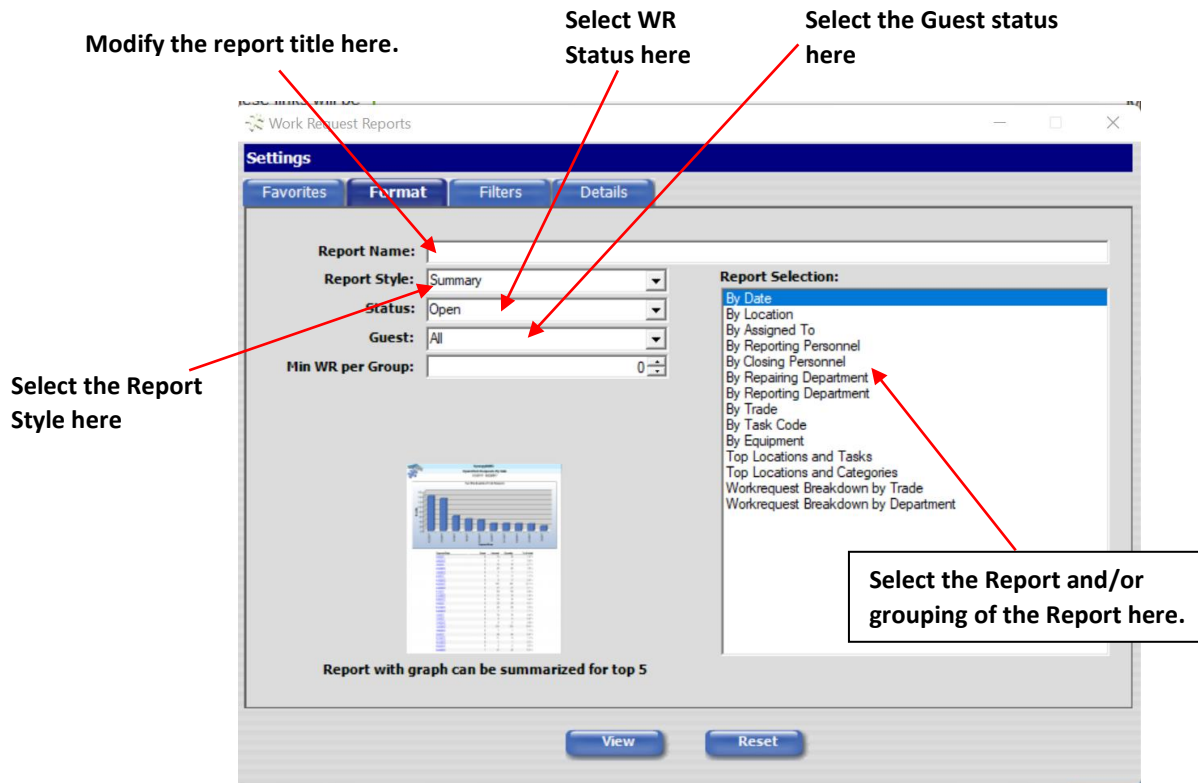
Reset the Report Settings to their default starting positions

Selecting a Favorite sets the options on the other Report Settings tabs with that Favorite's previously saved configuration.

Favorites and scheduled reports are user specific. Therefore, if a user's security rights are changed it is possible that the Favorite may no longer work or will no longer be sent via email. If an employee is deleted their scheduled reports will not be delivered.

Format

The Report Format Tab sets the basic parameters for the report to be displayed. Its settings include the report title, overall sorting of the report and the filtering of information based on types of records; for example: Open, Closed, Guest Initiated, or Internal WRs.



The Report Format Tab

The fields of this tab affect the report in the following fashion:

- **Report Name** – This allows for customizing the report name. Customized names can be more descriptive especially for Favorite reports. If left blank the standard report name will display. The standard name is the Report Selection title.
- **Report Style** – This affects the overall look of the report. Each style displays information in a slightly different manner. SynergyMMS has 2 main Styles of reports generally available in all areas. These are listed and detailed below.

Standard styles:

- **Summary**

These reports display a count grouped by the Report Selection option. This would be a starting place to get a breakdown for outstanding work.

This count can be limited to pull out a top X (5, 10 or 20) view. When limits are applied the sort of the report is based on count.

This report can be more than one page, if limits are not applied.

Drill down available for additional detail.

Graph default setting is: On
 Graphs differ depending on the limits of the items returned.

- **Detail**

- These reports display all details of the item.
- This report is usually more than one page.
- No drill down is available.
- Graph default setting is off

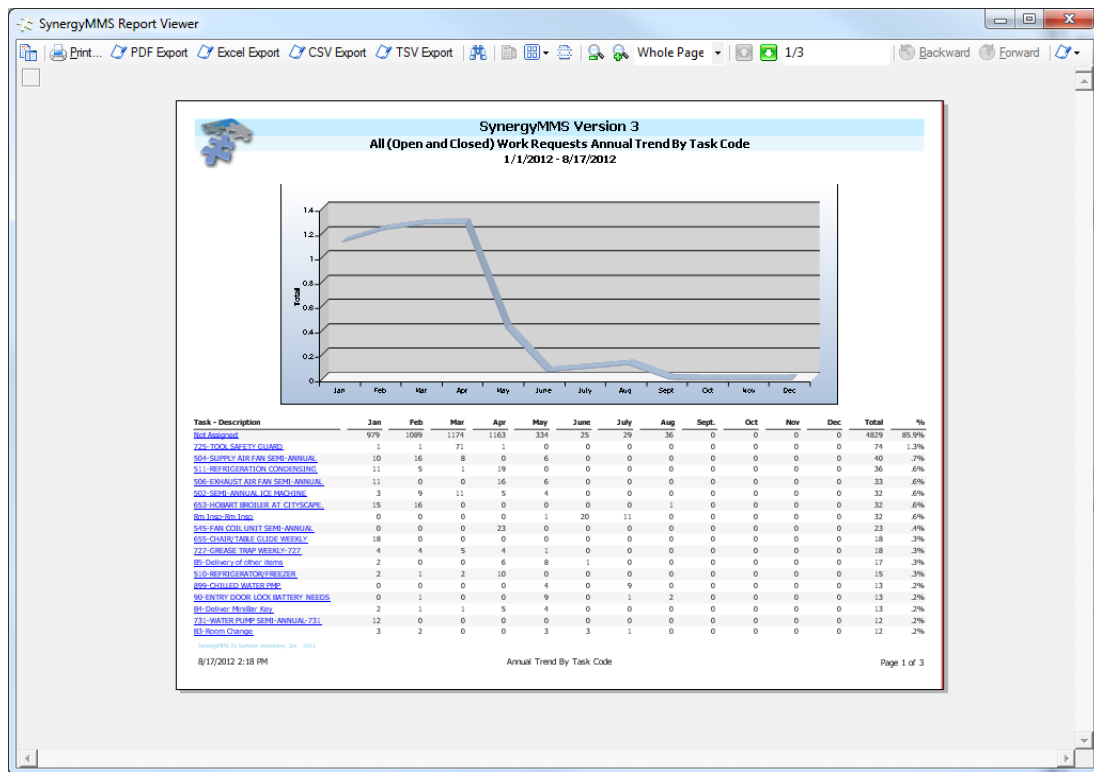
Work Request Detail reports offers many special options:

- Work Request or Preventive Maintenance Full Detail
- Inspection Results
- Dispatch transactions sorted by Work Request number or Output.
- Escalation reports
- Costing by Work Request
- ECT Deviation.

Other Work Request styles:

- **Annual Trend**

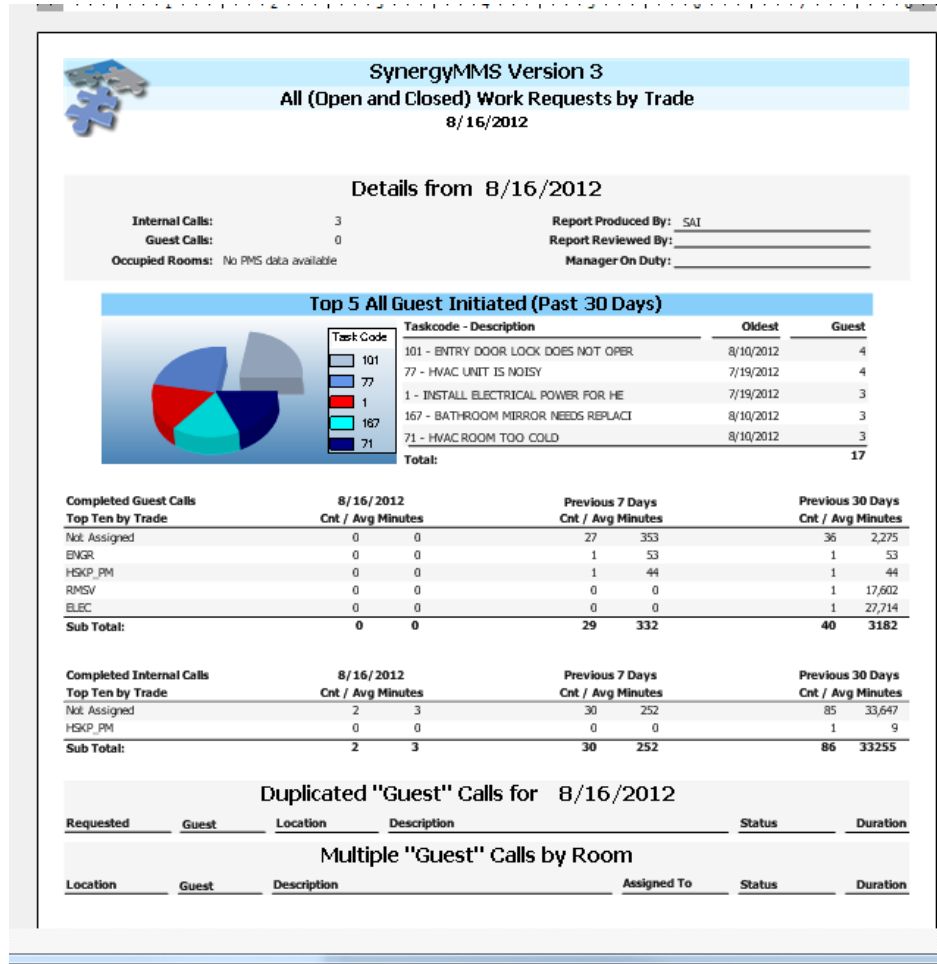
This report is great to see analysis of work entered into SynergyMMS over the year, as well as completed vs. outstanding work.



Annual Trend Report

○ Morning Report

The Morning Report gives a management view of what happened in the property yesterday. It provides a quick view of calls vs occupancy. This report is great for morning meetings.



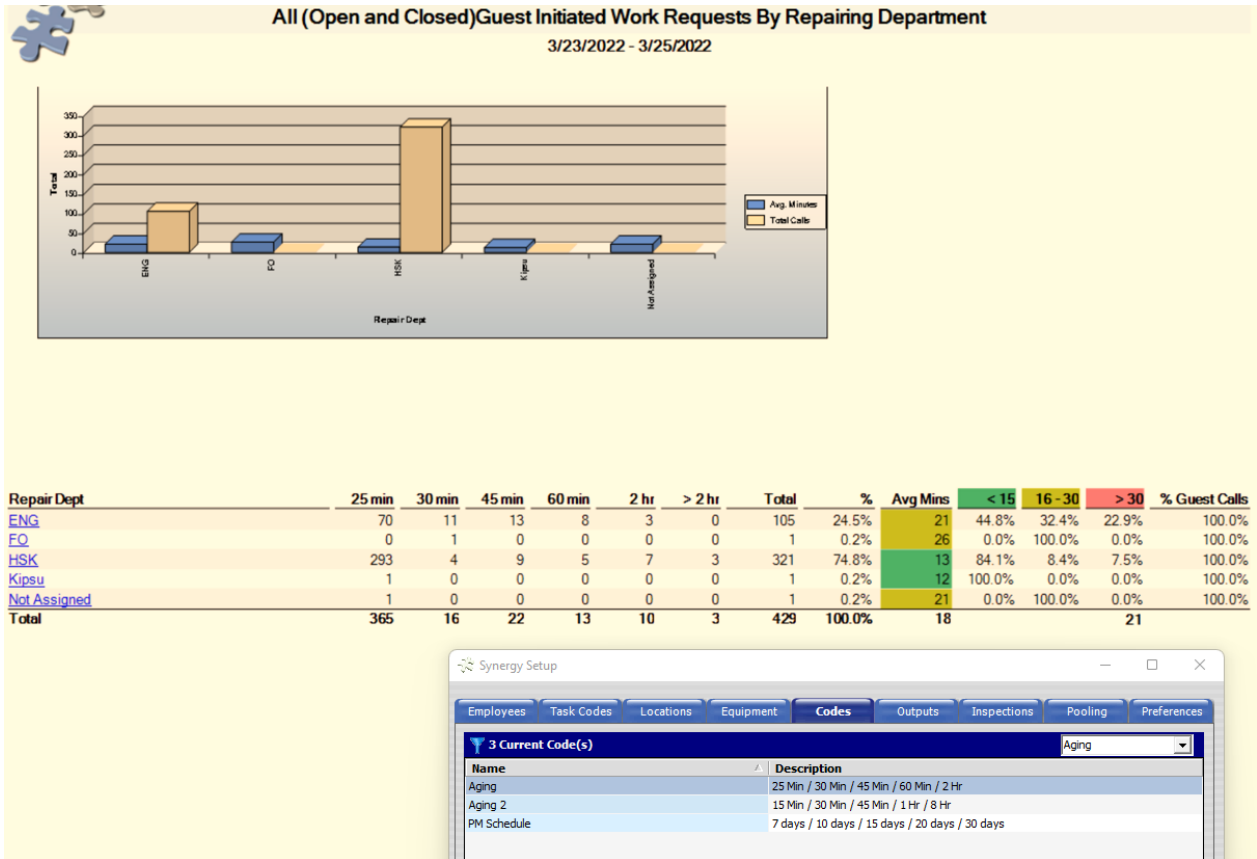
Morning Report

- **Aging**

Aging reports look at productivity, comparing time it took to complete work compared to the Estimated Completion Time (ECT).

When this report style is selected, you will also have to choose an Aging Criteria.

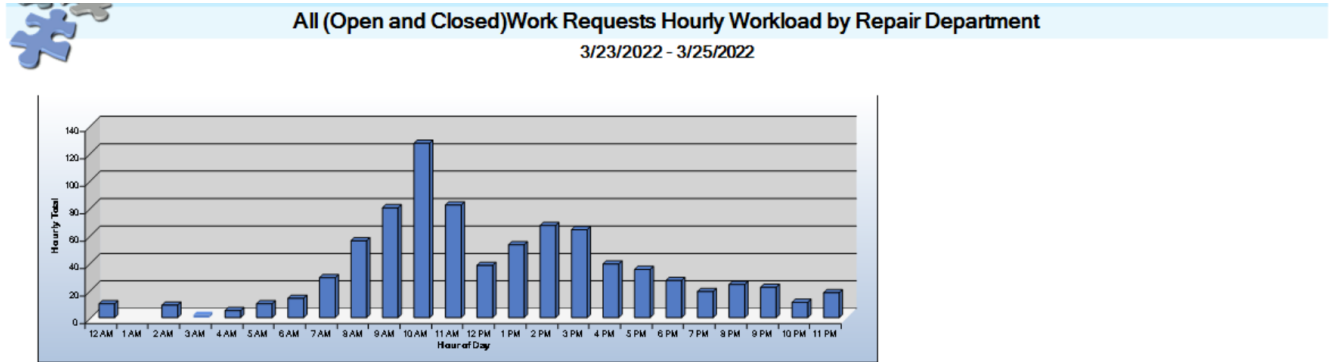
Aging criteria is set in the **Codes > Aging** area of **Setup**



Aging Report

- Hourly Workload

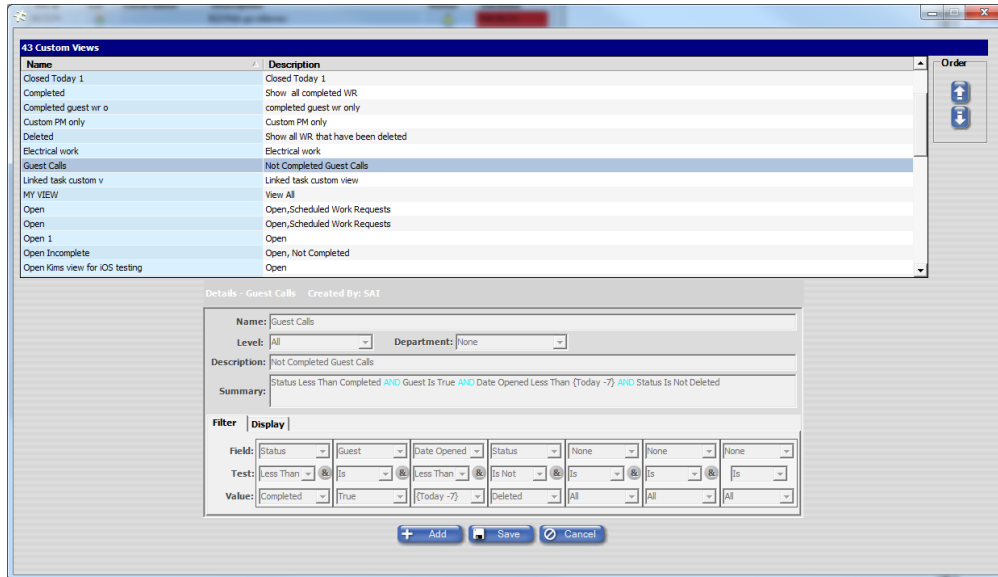
The Hourly Workload report is typically used to show when Work Requests are being created. This report is good to use for determining staffing requirements.



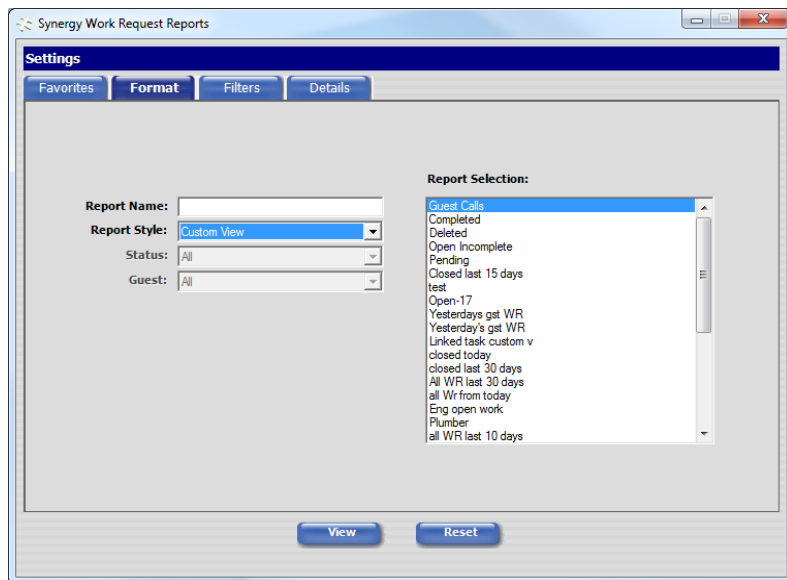
Repair Dept.	AM											PM											Totals		
	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9		10	11
HSK	7	0	7	2	1	3	8	20	43	54	58	48	24	36	43	38	30	26	19	10	18	18	7	13	533
ENG	3	0	2	0	4	7	6	9	13	22	68	31	13	16	23	26	9	9	8	9	6	4	4	5	297
Not Assigned	0	0	0	0	0	0	0	0	0	4	1	2	0	1	1	0	0	0	0	0	0	0	0	0	9
Kipsu	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1
FO	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1
Grand Totals:	10	0	9	2	5	10	14	29	56	80	127	82	38	53	67	64	39	35	27	19	24	22	11	18	841

- **Custom View**

This Report Style makes your Custom Views from the Work Request Full View (Picture below) available as a report that can be saved as a Favorite and scheduled to be emailed.



When Custom View is set as the report style, all other report filters and details options are disabled. The details of the Custom View take precedent.



Format with Custom View Report Style selected

- **Labor History**

This report displays the labor times associated with WRs in SynergyMMS.

SynergyMMS Version 3								
All (Open and Closed) Work Requests Labor History								
Labor by	Date/Time	WR#	Location	Description	Assigned to	Status	Duration	Labor
Lees, ARTURO	6/19/2015 10:02	814238	F-BLD-3	727 - GREASE TRAP WEEKLY-727 1. OPEN TRAP AND REM	Lees, ARTURO	Complete	6h 02m	02h 00m
	6/19/2015 10:02	814241	1-1073	727 - GREASE TRAP WEEKLY-727 1. OPEN TRAP AND REM	Lees, ARTURO	Complete	6h 02m	01h 00m
	6/19/2015 10:02	814245	None	727 - GREASE TRAP WEEKLY-727 1. OPEN TRAP AND REM	Lees, ARTURO	Complete	6h 02m	02h 00m
	6/19/2015 10:02	814248	None	727 - GREASE TRAP WEEKLY-727 1. OPEN TRAP AND REM	Lees, ARTURO	Complete	6h 02m	00h 30m
					#WRs	4	Sub total	05h 30m
					Total WR	4	Time	05h 30m

Report Filter: Worked on from 6/19/2015 to 6/19/2015 And Is Guest=Any And WR/PM=Any And Status=All
 SynergyMMS by Systems Associates, Inc. 2015
 6/19/2015 10:03 AM Labor History Page 1 of 1

① **Note:** The user needs to have Admin rights to WR Costing for this report to be visible.

- **Matrix**

Report Filters

Report Filters limit the number of records returned in a report based on the criteria selected from its various drop lists.

Select from numerous WR fields for filtering

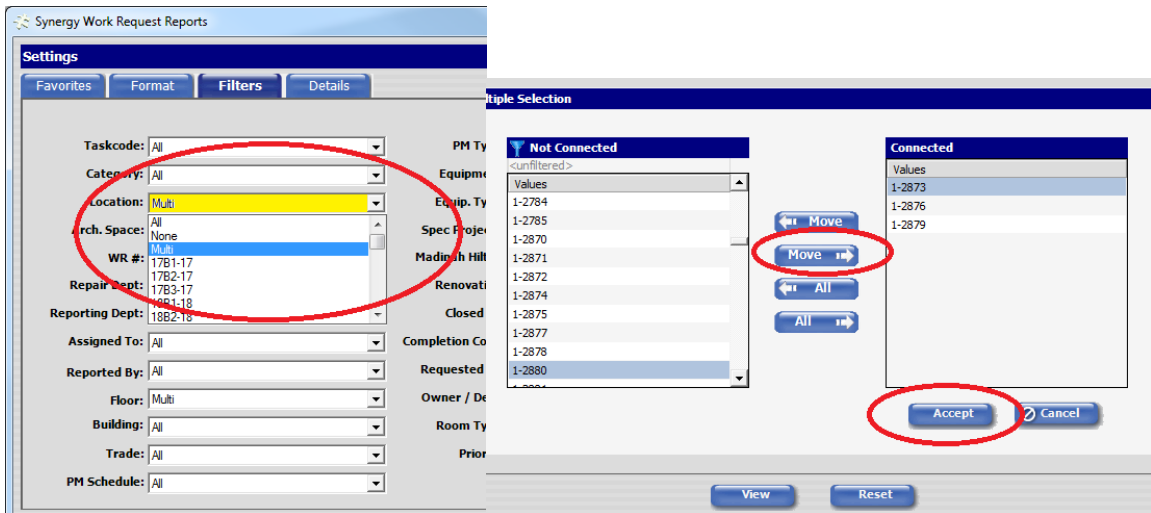
Select one or multiple filters

The Report Filters Tab

SynergyMMS also allows for None as an option.

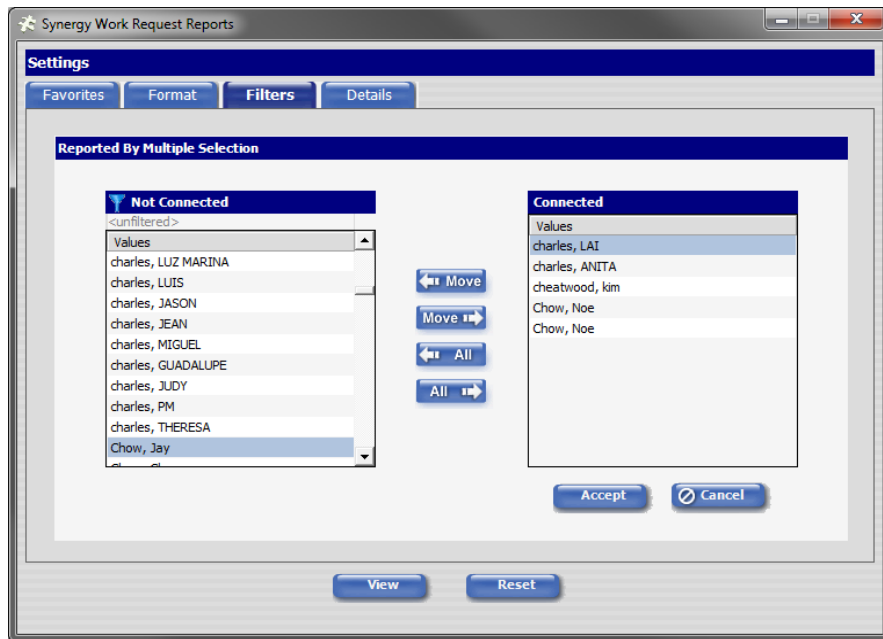
Each of the drop lists displayed represent a different piece of information regarding a Work Request in SynergyMMS.

Multiple or single items may be selected from a particular drop list. Multiple filters can be applied to a single report.



Multi-Select screens for Reports

If too many filters are applied to a single report, there is the likelihood that no records will be returned with the report as no matching records are found.



The Filters Tab Multiple Selection tool

Report Details

The Report Details tab contains other filtering and report options that do not fall under the first two categories.

Choose from five different time periods for the Date Range

Check here to start a new page with each group in the report

Select a predefined date period or enter a specific From and to date

Check to show a graph of the data

Limit the description to 50 characters to avoid long reports

Select between displaying regular WRs or PM generated WRs

Check to show Deleted WRs

Look for WRs with a specific duration

Look for WRs requested multiple times

Users are now able to select from a specific time as well as date

The Report Details Tab

The fields of this tab affect the current report in the following fashion:

- **Filtered Date Field** – Select from the following WR date ranges: *Created, Started, Completed, Closed* or *Scheduled For*.
- **Date Options** – Enter starting and ending dates in the fields provided. Select one of SynergyMMS' predefined ranges or enter a custom "From" and "To" dates. If you are saving this as a Favorite, you will want to use one of our predefined date ranges otherwise the dates will be hard coded to what you have set. SynergyMMS now allows setting a time as well as a date.
- **Duration** – Filter for WRs with specific duration.
- **Duplication Count** – Filter the report for WRs that were requested more than once due to attempted duplication.
- **New page with change** – Forces the report to start a new page for each group in the report.
- **Limit Description Length** – Allows users to select if the WR full description should display or be limited to 50 characters to reduce the report size for printing. This option only applies to Detail style reports.

- **Show Graph** – Show a graph of the report data. This option is not available for all report styles.
- **Type** – Select either *WR Only*, *PM Only* or *All (WRs and PMs)*. *All* is the default setting.
- **Deleted** – Select either “Not Deleted,” “Deleted,” or “All” (Deleted or Not Deleted). “Not Deleted” is the default setting.
- **Summarize** – This setting allows the user to select *Unlimited*, *Top 5*, *Top 10*, or *Top 20* grouping of WRs. This option is only available in Summary and Managerial report styles. Summary reports default to *Unlimited* and Managerial reports default to *Top 10*.

ⓘ **Note:** Showing the graph on reports with too many records may result in an unreadable graph. The default setting is for the graph to display with Summary, Managerial, and Annual Trend reports, among others.

ⓘ **Note:** Some of these settings do not apply for all reports. These options will be disabled on reports that in which they are not intended to work.

Report Viewer

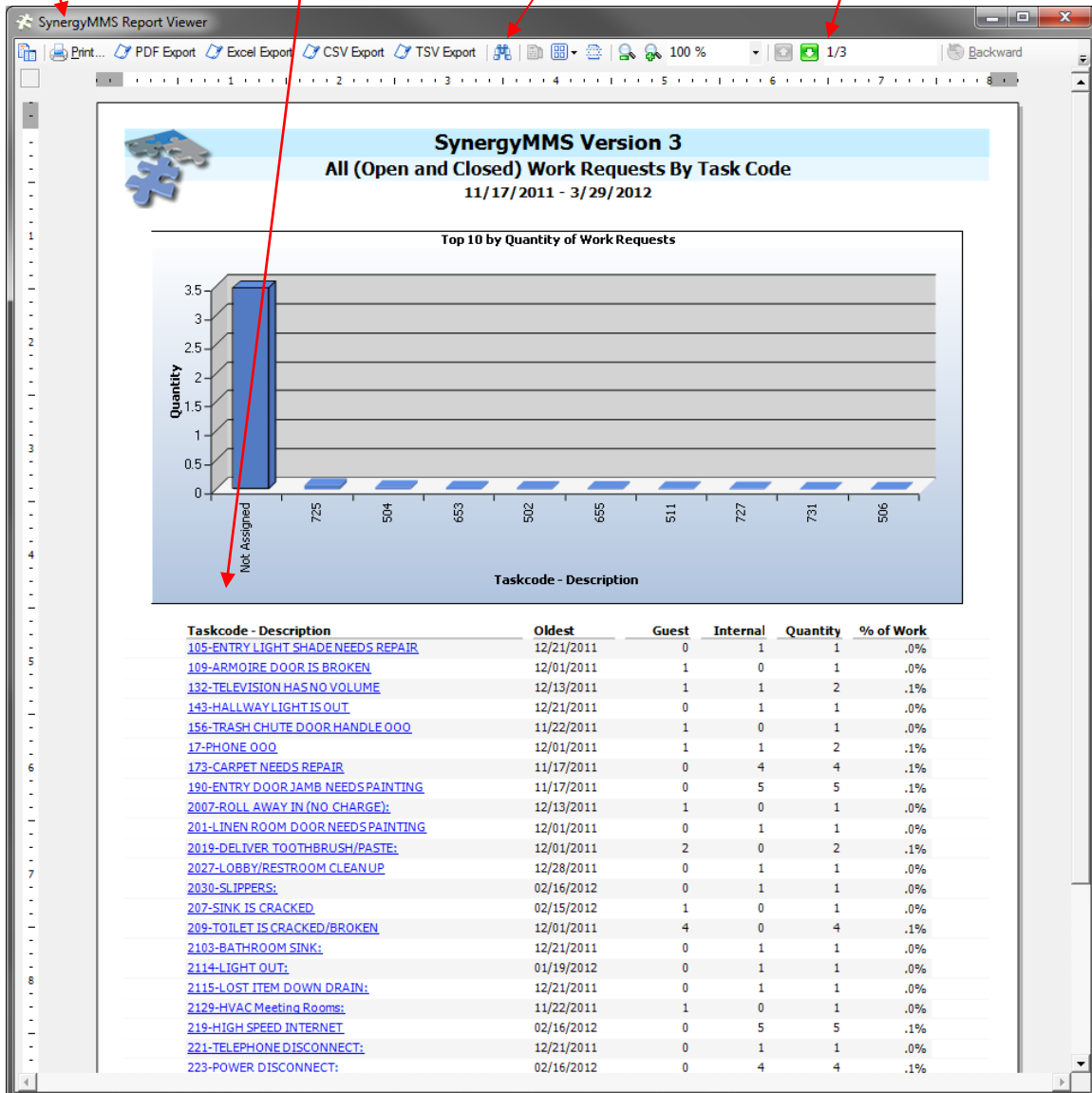
The Report Viewer contains many tools for navigating and reading the data in the report. Most of these can be found in the Report Toolbar, located at the top of the report. The different elements of the Toolbar are listed below.

Report Toolbar (Print or Export to PDF, Excel, CSV, or TSV file)

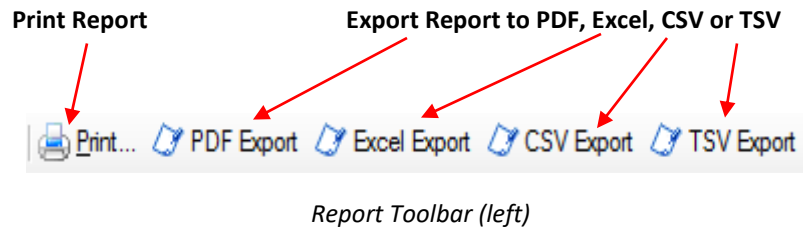
Search for data using the Binoculars

Clicking on a specific item will open a drill-down report for that item

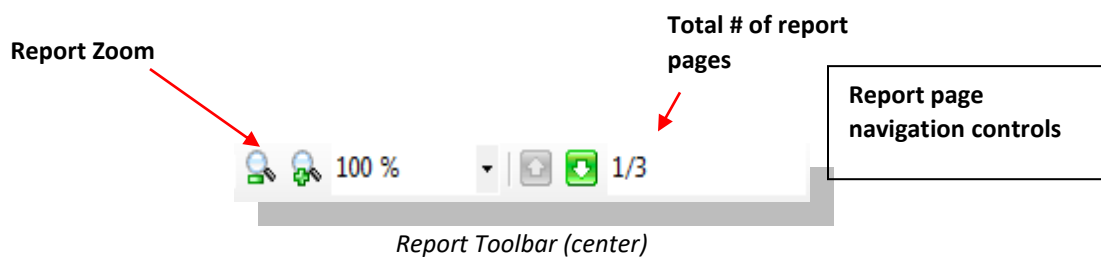
Move between pages



Typical Summary Report with graph



- **Print**– Prints current report. This will launch a printer dialog window.
- **Export Report** – Select from a wide variety of formats to export your current report.



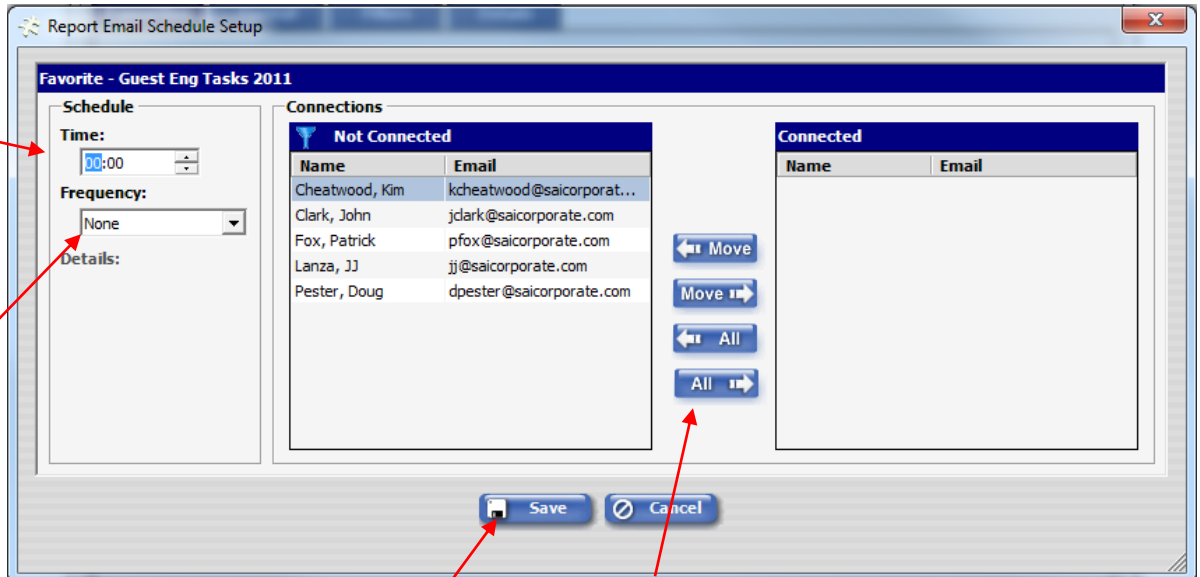
- **Report Zoom** – Change the display size of the report by selecting a number from this drop list or entering a custom zoom.
- **Report Page Navigation** – Use these buttons to move to the previous page (upward pointing arrow) or next page (downward pointing arrow) of the report.
- **Current Report Page** – Displays current report page before the slash (/). Enter a number here to move to that page.
- **Report Page Total** – Displays total number of pages after the slash (/).

Report Email Schedule Setup

The Report Email Schedules Setup allows users to create a schedule for Favorite reports to be delivered via email to select email addresses. To access the Report Email Schedule Setup, select a Favorite report from the list on the Favorites tab and click the **Schedule** button.

Select the time you would like the report to be sent (24-hour clock)

Select the frequency of the report to be emailed (Annually, Daily, Monthly, or Weekly)



- Save the schedule or cancel changes.

Move email address into the connected list to include them in the email.

- Email Schedule Setup window
- Emails addresses are referenced from records in the Employees area of Setup. In order to send an email report to an individual, that person must be added to the Employees list with a valid email address in the corresponding field. No additional user rights are needed to receive emailed reports.
- **SynergyMMS** automatically processes the report at the scheduled time and creates a PDF copy which it stores on the **SynergyMMS** Server. The application then sends the appropriate users a link to that file (see image below). Using the link, users can view or download a copy of the report on a variety of computers, tablets, smart phones, and devices.

Users are recommended to add **synergymms.com** and **synergymms.net** as trusted email senders to ensure timely delivery of emailed reports.

Note: To Delete an Email Schedule, the Frequency needs to be set to *None*.

Note: **SynergyMMS** email reports are sometimes seen as Junk, so you may have to setup a rule for the sending address to be allowed. Sending address *.synergymms.net.

SynergyMMS Auto-Generated Report Email



SynergyMMS Report Emailer <noreply@synergymms.net>
To ✓ Blaine Bryant

A report has been auto-generated and e-mailed to you from SynergyMMS.
Please click the link below to view the report in PDF format.

Report For HotelHealthScore Description: [CurrentEmployeesinSynergyMMS](#)

Typical example scheduled report email with PDF link

Chapter 7 SynergyMobile

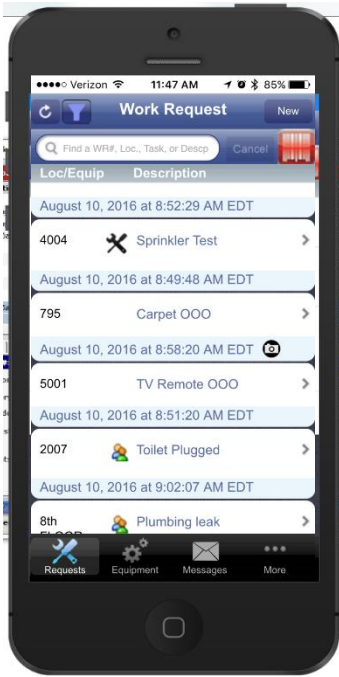


FIGURE 1: SYNERGYMMS IOS APP

SynergyMobile empowers the busy hotel team member and gives them exactly what they need on the go. Users can create, edit, and complete or close work requests as well as conducting room and equipment inspections based on multi-step lists. Users can also record readings during these inspections to help track trends and record labor time to help with scheduling. Finally, pictures can be added to help detail the work request.

The data is displayed based on user-sensitive need. Users have the ability based on their rights to see more or less using the filter options. Work is displayed based on priority and then age. The highest priority work will be at the top of the list allowing users to simply take care of their items in order.

Using the mobile means work is added into the main database throughout the day through the sync process instead of having to go back to the office to log it.

Platforms

SynergyMMS – Offers 3 platforms to allow access from a smart device.

iOS – The app from the App Store that can be loaded on to a smart device running the iOS.

Android –Download the app from Google Play Store.

- Both of the above can work disconnected from the internet. This means that if you get into an area where no connection via wi-fi or cellular you can still actively add items.

Basic Web Interface – Commonly referred to as Legacy Mobile. This can be loaded on any devices that allow internet access.

- Requires a constant internet connection.

Installation

To install the desired app, click on the appropriate link below.

- iOS – <https://docs.sai.us/docs/?d=2>
- Android – <https://docs.sai.us/docs/?d=1>
- Browser (Legacy) – Open Browser and enter URL → <http://Launch.SynergyMMS.com>

Access

Open the app on the device. Depending on if this is the initial time you are loading or if you have already loaded the app, you will get the Login or the Setting screen.



Logging In - Enter your Login and Password, then tap Login.

Note this screen is where you will access the settings.

Click Here if you forgot your Login or password.

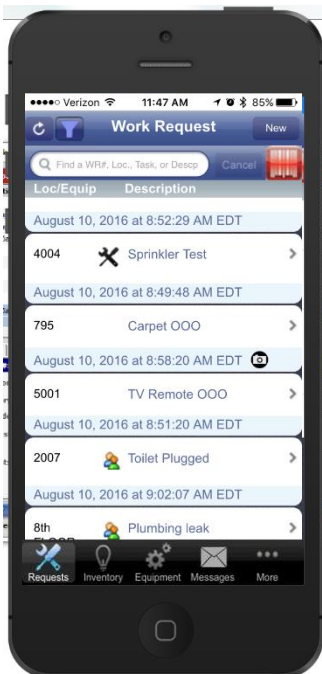
Your Device's Output Name

If this is your first time, you will need to enter the Property ID provided by your Vendor. Contact them if you need this.

Once this information is complete then you can tap the setting arrow button to go back to the Login Screen.

When you login you will be in a claimed state. WR that you accept or complete from this device will be updated with your name as the assigned to, this is regardless of the device's output name.

The Work Request Screen



The Work Request screen (sometimes referred to as the home screen or page) of the app is where you will navigate through the application.

From here, you can choose what you want to do such as adding a New Work Request or editing existing Work Requests.

You can search for a particular location, equipment, or description by typing in the search field. You can also scan in a bar code label of either a location or a piece of equipment and click "Go" to search for open work requests or PM/WR's for that item. Matching work is displayed. Nothing found and the list will clear.

Finally, with the app you are able to get 'in-app' dispatches also known as 'push notifications' which cause the device to make a noise and depending on what screen you are on, possibly display a pop-up notification (like a text message) of the dispatched work.

Menu Bars



- The above menu bar displayed at the top of the screen offers buttons to:

1. Force a sync



- Pressing this icon forces the app to connect to the main database and get or send data as needed.




- This symbol indicates a synchronization is in progress.

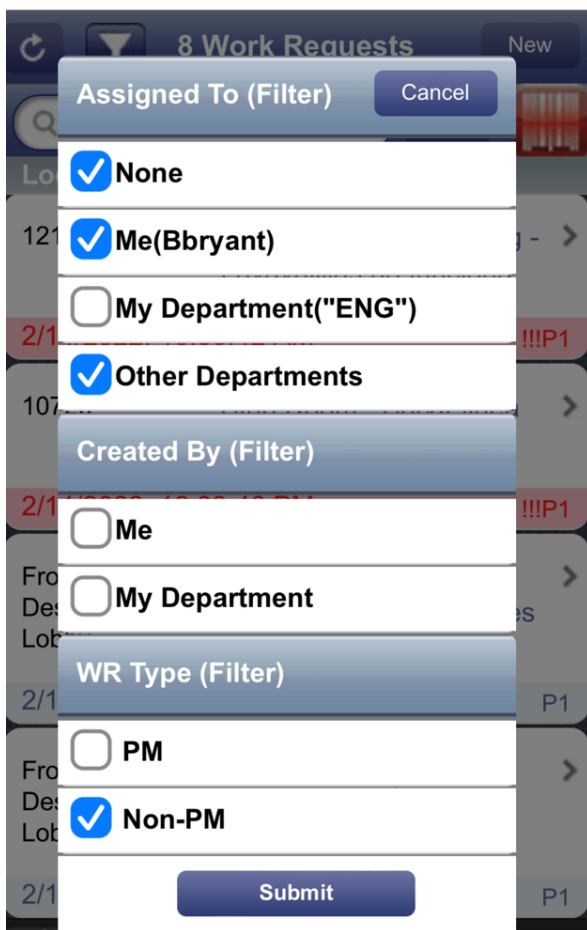


- This symbol means you do not have a connection to the internet via cellular or Wi-Fi. This means your device is not able to connect and synchronize, send, or receive data. Move to an area with service.



- This symbol indicates that you are connected to your Wi-Fi Network, but that network does not have access to the internet.

2. Filter the work request  (This is one of two filter options offered for the users)







With this filter you can, depending on your rights, change the view of the Requests Screen:

1. Assigned To
 - a. None – Displays all of your department’s Work Requests that are currently not assigned.
 - b. Me – Displays all Work Requests assigned to you.
 - c. My Department -Displays all of your Department’s Work Requests that are assigned.
 - d. Other Departments – Displays all Work Requests that do not belong to your department.
2. Created By
 - a. Me – Displays all Work Requests you created
 - b. My Department – Displays all Work Requests created by others in your department
3. WR Type
 - a. PM – Displays all Preventative Maintenance Work Requests
 - b. Non-PM – Displays all Work requests that are not Preventative Maintenance.

Note: Items appearing disabled are based on the rights you have been configured with. See your SynergyMMS Admin if you feel you need more rights.

3. Create New WR.  We will cover this more in a bit.

 - This menu bar is used for filtering work also.



-  - In this box you can filter your Work Requests by typing in a Work Request Number, Location, Task Code, or description.
-  - If you have barcodes assigned to your locations, equipment, or inventory items you can use this button to access the barcode scanner to instantly search for them.
-  - After you have searched you can clear the results with the cancel button.

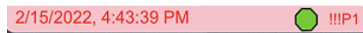




- This menu bar allows you to go to different areas of the app.

- **Work Request** – Displays the list of work request.
- **Inventory** – Displays inventory lists and storeroom information.
- **Equipment** – Allows Equipment and equipment location to be viewed/edited.
- **Messages** – Shows new Messages (Dispatched WR / Push messages) and claimed status.
- **More** – This is where you will see the event log, logout, or change your password.




- Work Request Detail Area icons.
 - Icon for Guest Request 
 - No Icon denotes an Internal Request
 - Icon for Inspection Request 

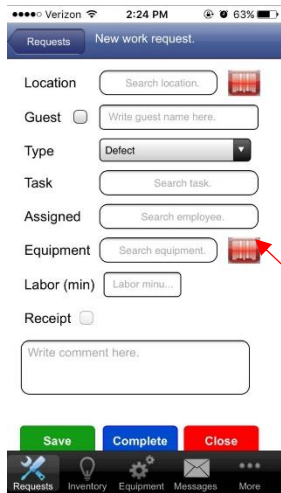


- Work Request Status Bar notifications.
 - Color
 - Red indicates that the Work Request has been escalated
 - Blue indicates a normal state
 - Date/Time shows when the Work Request was created
 - This symbol denotes a picture is attached - 
 - This symbol denotes the WR which you have started - 
 - The P# indicates the priority of the Work Request.
 - If you see !!! in front that means the Work Request has been escalated

Work Request

To Create a new Work Request (WR), click the 'New' button, to Edit simply tap a WR on the  Screen, both will cause the WR form to display. The form will either be blank for a new WR or have the data from the existing WR you are editing.

If you are creating a New WR the title bar at the top of the screen will say "New work request", if editing you will see the WR# on the title bar.

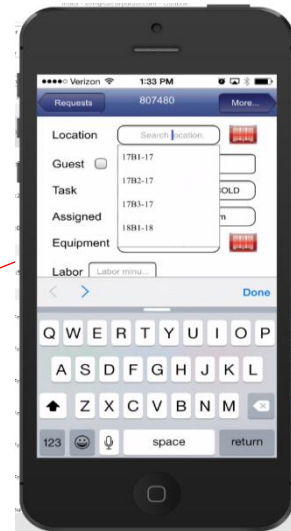


To add or edit data on the WR form tap the field. As you start to type you will get a drop down with predefined data. When you see the item, you must tap the item in the list for it to be selected.

Note: Data must be selected from the list to be valid.

You have all the basic fields you have on the Desktop: Location, Guest check box and name, Type, Task code, Assigned to, Equipment.

Note: If PMS interface is in place, Guest name will show up after the data is synced with the main database.

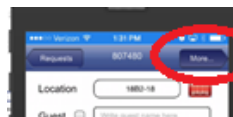


Labor: You can enter the amount of time you have worked on the WR, and this will be updated into the Cost screen on the Desktop to account for labor time and cost.

Note: If you Start or Stop a WR a labor record is created automatically. Users should only do one of these, not both.

Complete or Close: If you have rights to Complete and / or Close WR you will have access to both the Complete and/or Close buttons. Completing or Closing a WR will remove it from the app. **The SynergyMMS App will never show a completed or closed WR.** A sync will be forced when you complete or close also, assuming a connection can be established with the Wi-Fi and SynergyMMS servers.

More (button on the WR form, top right corner)





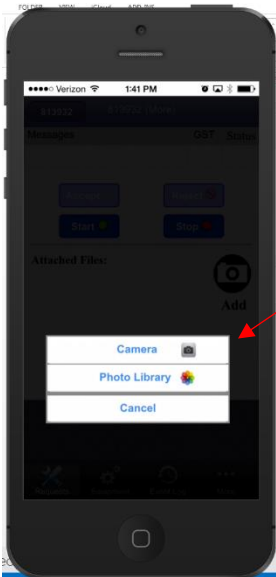
From the "More" page you are able to:

Accept or Reject work that has been Dispatched to the device.

① **Note: If the particular WR has not been dispatched to the device you are viewing it, on the 'Accept' and 'Reject' will be disabled.**

Start or stop any work regardless of the state (WR must not be completed or closed as those do not show on the device) as long as you have access and rights.

Add Pictures  Add



When you click Add Picture, you will be taken to a screen to choose your camera (You can then take a picture on your device) or your existing photo library you have on the device.

You can add up to 3 pictures per WR.

Inspections



Detailed room and equipment inspections have never been easier. Properties can create their own custom inspections in the Setup > Inspections Screen of the SynergyMMS desktop. Details for this are provided in the Setup section of this manual.

The picture on the left shows a Stoplight Inspection displayed on the app.

Every item on the inspection has an area to choose its status. If red is checked, the user is automatically taken to a new work request form allowing them to fill in the details and save or complete the work. Once the new work request is entered, the user is returned to the inspection form automatically. Once the user completes the inspection the work requests will be dispatched if they were not already completed.

A user can add comments to any given question, simply by clicking the . You can tell if comments have been added because it will change to . This is a great tool for recording meter readings and chemical values.

Any work requests created from an inspection are recorded and a link to the originating question is also recorded. The inspection process is remarkably simple and intuitive and captures the necessary data to help refine the inspection process in the future.

- **Note:** Pictures are not able to be connected to the Inspection via the app in this screen. They can be added by clicking the Edit button at the top of the screen, or from the desktop.

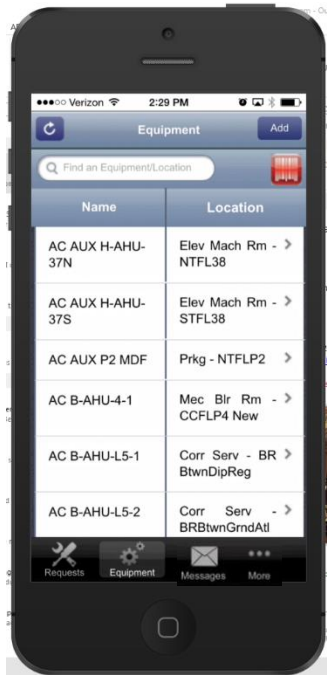
Prime Hotel			
Work Request Inspection Results			
Inspection: Equip - Equip Walk thru		Repair Dept: Not Assigned	
Inspected By: Clark, John		Repair Trade: Not Assigned	
Inspected Date: 02/27/2008 03:16 PM		Equipment: Not Assigned	
Location: 1004			
Comments:			
Items	Response	Note	WR #
Check toilet flush	✓		
Test thermostat	✓		
TV Remote batteries?	X		3177
Check fan coil unit	✓	cleaned coil	
Check telephone	✓	line 2 has static	
Is the television working properly?	✓		

This is a sample 'WR Inspection Results' report resulting from an inspection. This report shows the location of the inspection, the response for each question, the notes for each question and the corresponding work request number for any questions that resulted in generating a work request. You can review this report at your property from the Desktop – Toolbox / Reports / Work Request Reports – Set the Style to Detail, choose the Inspection Results from the Report Selection.

Other Areas

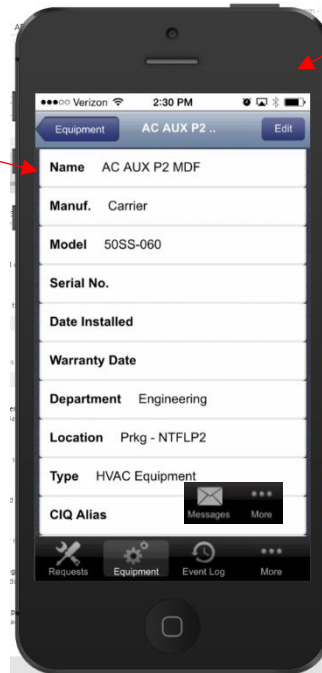
Equipment 

In the app you have access to view/edit the Equipment you have loaded through the Desktop. This assumes that the user has at least departmental rights to the System Setup area.



Simply tap a piece of equipment in the list and the details will fill the form.

Swipe up to see more.



Touch Edit to change any details in this form.



To add or edit Datasheets on your equipment swipe to the bottom and click the Datasheets button.

To Add click Add

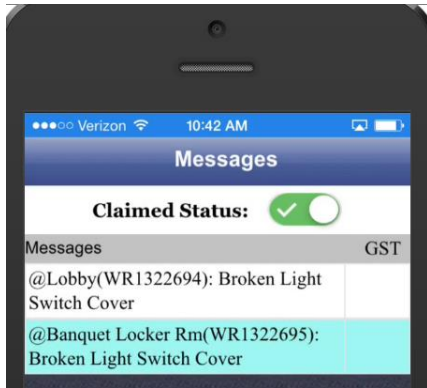
To Edit tap the Datasheet.





Messages

Blue vs White Messages: What does it mean?



White messages have been read; blue messages have not been read.

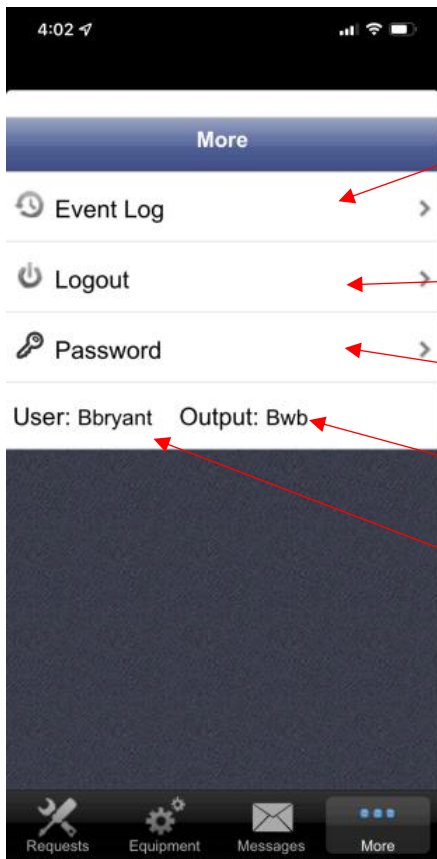
Once you reply the message goes away.

You can get back to this screen by tapping the More option on the bottom menu.

On the Messages page you can also Claim or Un-claim your device. Simply tap the slider and it will change.



More



Event Log is used for troubleshooting purposes. Support may ask you to look at this or send them screenshots of this area.

Logout of the app

Change Your Password

Output device name in SynergyMMS

Currently logged in user

Extras about the Apps:

Noise – You will get the **SynergyMMS App Noise** when a WR is dispatched to the output device. You must have the sound on for the device and the volume is also controlled by the device.

Pop Up – Pop up messages will display as long as the form you are in is not an editable form.

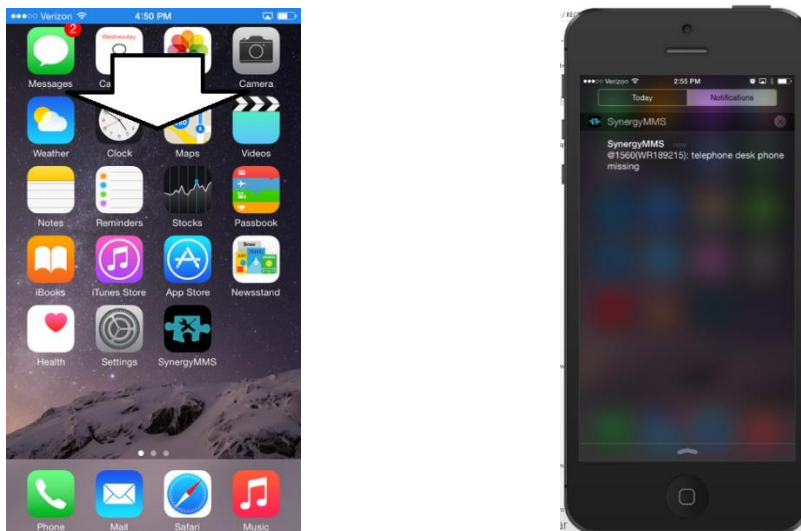
Example: The WR form and the Inspection form are editable forms.

So, if you are in the midst of creating a WR you will only get the noise. If you are at the WR list, you will get a pop up. This is also dependent on how the device is configured. If you have the setting in Banner mode, you may get a different screen.



Notification center

From the home screen on the device (where all the apps are displayed in icons) you swipe down from the top you can see new Notifications.



Devices

The devices available today iPhones, iPods, iPads, Android phones or tablets are great tools, but you must take time to understand the basics of the device. An assumption is made here that you have a basic understanding of the device you are using, before using the **SynergyMMS** app.

You also want to be aware of the version of the OS (Operating System) being ran on the device. If the devices OS is not up to date the app on the device may not function as expected.

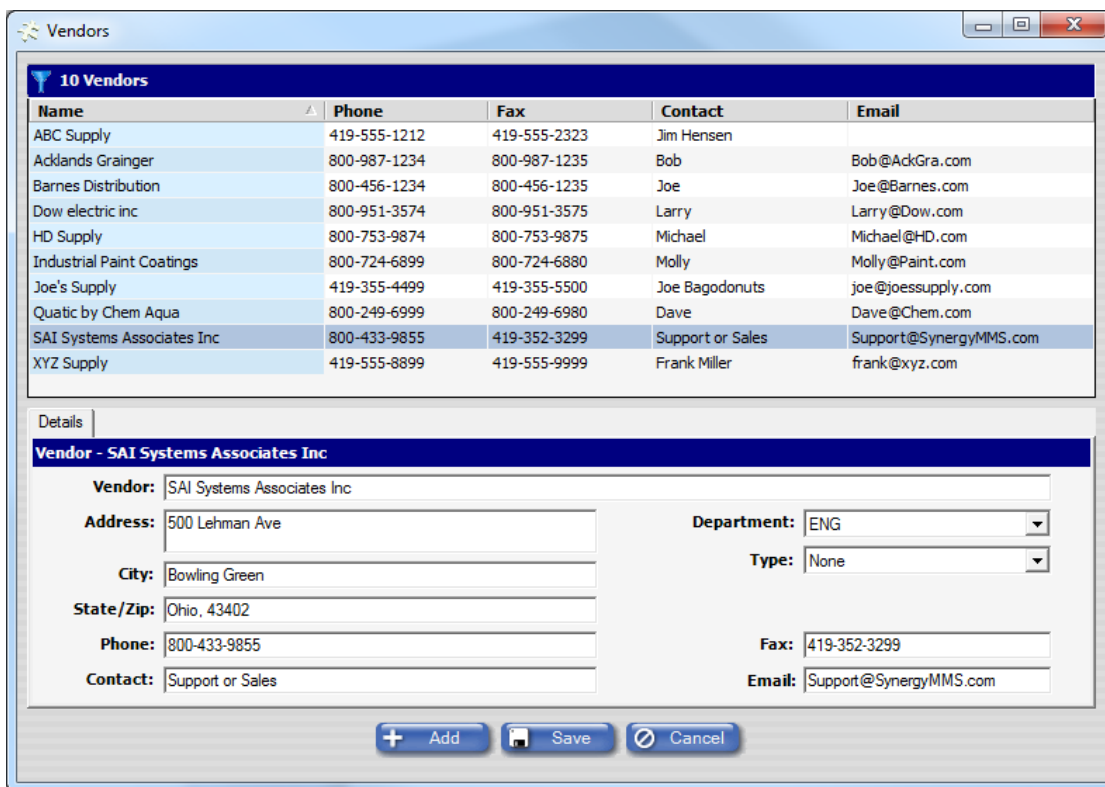
Contact SAI or your Distributor for updated Specs. A typical rule is nothing older than 2 versions behind what is currently available.

Chapter 8 SynergyMMS: Inventory Vendors

The Inventory module in SynergyMMS allows for inventory tracking and storage as well as common vendor information. Cost, preferred vendor and storage, as well as additional updates of quantity are maintained here. Inventory count can be reduced through adding costing to Work Requests and Preventive Maintenance.

The Vendor list is used to store general information, such as phone/fax numbers, address, and contact person, for the Vendors from which you buy goods and services. Within this list you may add, delete, or edit Vendors, or simply review the list.

SynergyMMS provides a great tool to keep all your information in one place making it easy to find and allowing all property employees access to what they need.



Vendors List

Accessing Vendors List

To Access the Vendors List, click on the Toolbox then select **Inventory**, then **Vendors**.

Entering New Vendors

To enter new Vendors:

1. Once the Vendors List is displayed, click the **Add** button.
2. Enter the Vendor name. Press the Tab key to move to the next field.
3. Repeat step #2 for the Address, Phone, Contact and remaining fields.
4. Click the **Save** button to save your work.

5. To add additional Vendors repeat steps #1 - #4.

Editing Vendors

From time-to-time it will be necessary to edit or add information to related Vendors.

To edit existing Vendors:

1. Select the Vendor by clicking the row in the Vendor List.
2. Change the Vendor information as needed.
3. Click **Save** button to save changes or click **Cancel** button to clear your changes without saving.

Deleting Vendors

As Vendors change it may become necessary to delete Vendors no longer used.

To delete Vendors:

1. Right-click the Vendor row you wish to remove.
2. Select the **Delete** option from the popup menu.

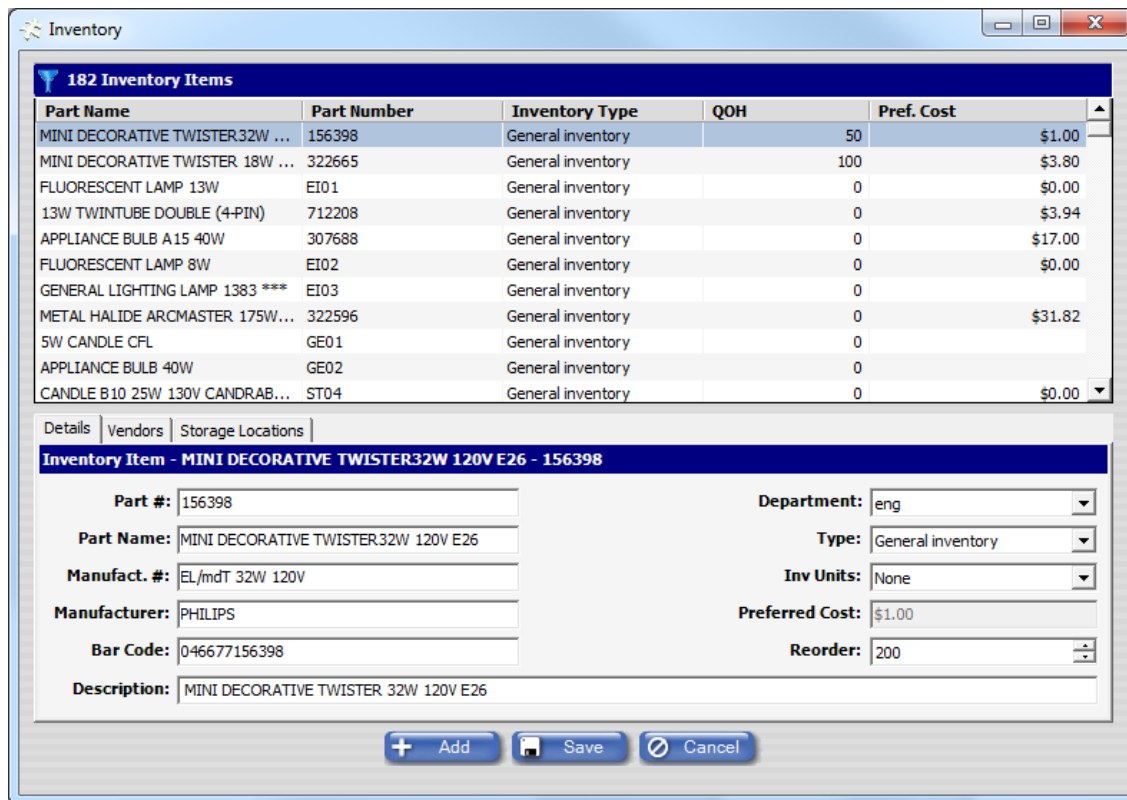
Basic data regarding a Vendor is included in **SynergyMMS**.

- **Vendor** - This field has a size of 50 characters. A Vendor must have, at minimum, a name to be saved in **SynergyMMS**.
- **Address** - Enter the Vendor address. Each address field has a size of 50 characters.
- **City** - Enter the city of the Vendor.
- **State/Zip** - Enter the state and zip code of the Vendor.
- **Phone** - Enter the Vendor phone number. This field can contain 20 characters. **SynergyMMS** does not format the information in this field.
- **Contact** - Enter the contact person's name. This field has a size of 40 characters.
- **Department** - Select the Department that will use this Vendor from the drop-down list of choices. If more than one Department will use this Vendor select *None*. If the desired Department is not available, it must be entered into the **Codes** area of **Setup**.
- **Type** - Select the Type of products/services this vendor provides from the drop-down list. If the desired Type is not available, it must be entered into the **Codes** area of **Setup**.
- **Fax** - Enter the Vendor fax number. This field can contain 20 characters. **SynergyMMS** does not format the information in this field.
- **Email** - Enter the Vendor email address for contacting this vendor. This field can contain 40 characters.

Inventory

SynergyMMS easily tracks Inventory by calculating the Quantity of items on hand (QOH), tracking best price per Vendor, and tracking where items are stored. **SynergyMMS** automatically updates the QOH when changes are recorded by adding cost to a Work Request.

From here, it is possible to Add, Edit and Delete Inventory items, manage your QOH, review Vendor information regarding unit prices and set the Reorder Point.



Inventory Item List

There are three main components to Inventory: **Details**, **Vendors**, and **Storage Locations**.

The Details tab contains the basic information about Inventory items. Each of the areas on this form is described below followed by directions for Adding, Editing and Deleting an Inventory item.

List

- **Part Name** – The Part Name can be up to 50 characters.
- **Part Number** – This is the number by which the Inventory item is used in other areas. The Part Number can be up to 20 characters (both letters and numbers can be used).
- **Inventory Type** - Select the part Type from the drop-down list. If the Type desired is not available, it must be entered into the **Codes** area of **Setup**. This will allow filtering by Type on the Inventory List and Inventory Reports.
- **Quantity on Hand** –This number displays the total number of parts within the facility. This field cannot be edited. The number found here comes from the Storage Location tab. All editing of this quantity must be done on that form. As parts are issued, this number will update automatically.
- **Pref Cost** – This number is set on the Vendors Tab once connected the cost can be updated and set as preferred. If only one Vendor cost then it is automatically set.

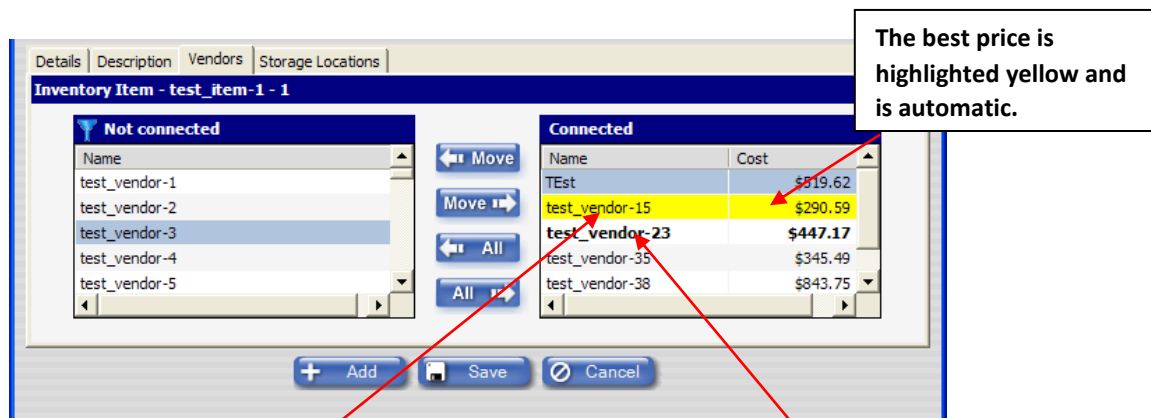
Detail Tab

- **Part #** - This is the number by which the Inventory item is used in other areas. The Part Number can be up to 20 characters (both letters and numbers can be used).
- **Part Name** - The Part Name can be up to 50 characters.

- **Manufact. #** - Enter the Manufacturer Number, if different from the Part Number. The Manufacturer's Number can be up to 20 characters.
- **Manufacturer** - The Manufacturer can be up to 50 characters.
- **Bar code** –For use with the **SynergyMobile** application, as a means to scan instead of typing in the information. The Bar code can be up to 22 characters.
- **Description** - Enter the description of the Inventory item here. The Description can be up to 100 characters.
- **Department** - Select the Department from the drop-down list. If the Department desired is not available, it must be entered into the **Codes** area of **Setup**. If the Inventory item is used by more than one Department, leave *None* in this field.
- **Type** - Select the part Type from the drop-down list. If the Type desired is not available, it must be entered into the **Codes** area of **Setup**. This will allow filtering by Type on the Inventory List and Inventory Reports.
- **Inv Units** –This is the unit of measure the inventory item is used. If the unit is not available, it must be entered into the **Codes** area of **Setup**.
- **Preferred Cost** – This is the best price based on information in the Vendors tab. This field is filled in automatically and cannot be edited on this tab.
- **Reorder** – This is the reorder quantity. When the QOH falls under this, the item displays on the Shortage report for reorder purposes.
- **Quantity on Hand** – (List only) This number displays the total number of parts within the facility. This field cannot be edited. The number found here comes from the Storage Location tab. All editing of this quantity must be done on that form. As parts are issued, this number will update automatically.

Vendors Tab

Vendors can be connected to this inventory item. Once connected, a price can be set, as well as a “preferred” status can be assigned.



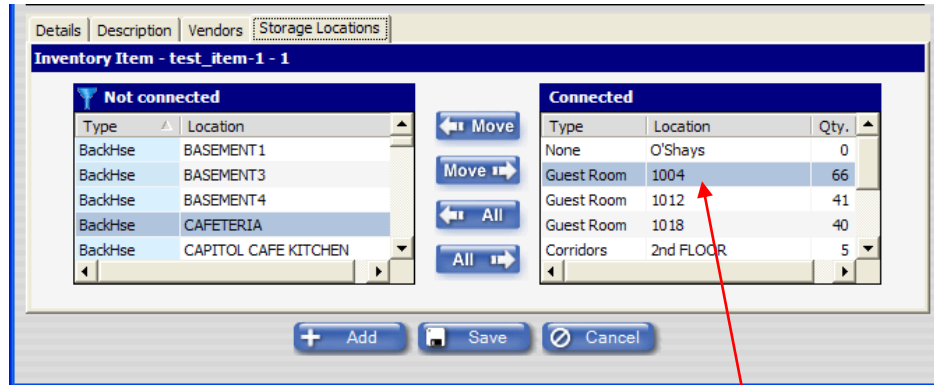
Right-click the connected vendor to set the inventory item price as well as preferred vendor status.

Vendors Tab

The Preferred vendor will be displayed in BOLD text and is set by the user.

Storage Locations Tab

The Storage Location is where the location information as well as quantity in that location is stored.



Storage Locations Tab

Right-click the location to set the quantity stored there.

Inventory List

Accessing Inventory

To access the Inventory Storeroom:

1. From the **Toolbox** select **Inventory**.

Editing Inventory Items

To edit an existing Inventory item:

1. Select the desired item from the Inventory List.
2. Change the Inventory information as needed.
3. Click **Save** button to save changes or click **Cancel** button to clear your changes without saving.

Deleting an Inventory Item

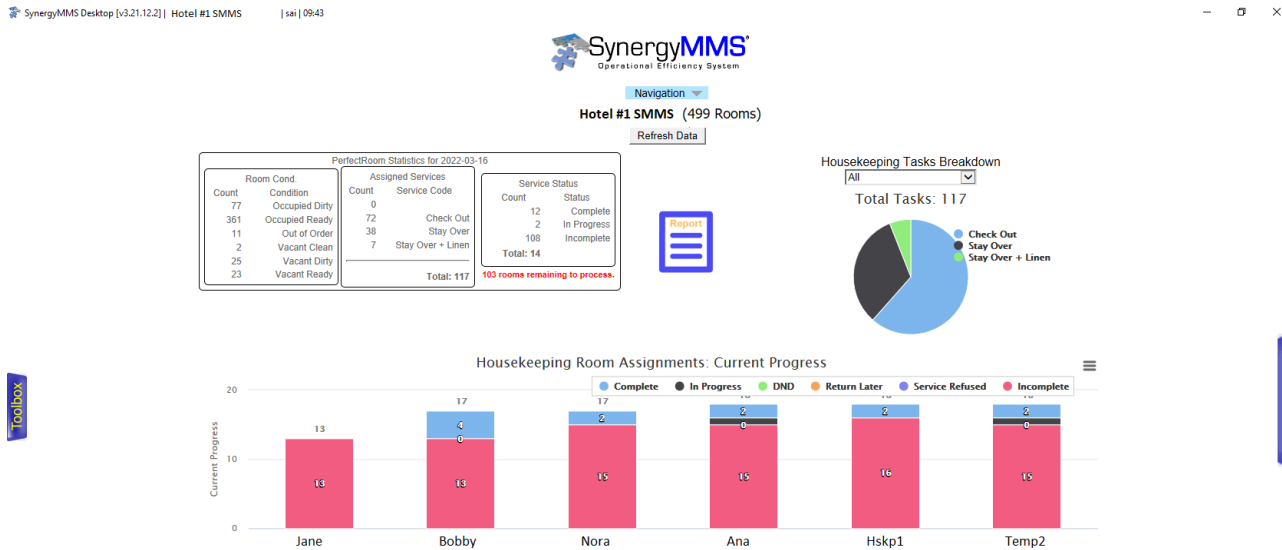
To delete an Inventory item:

1. Right-click the Inventory item you wish to remove.
2. Select the **Delete** option from the popup menu.

Chapter 9 PerfectRoom®

PerfectRoom assists with room readiness and allows for room service assignment, Guest Room Attendant (GRA) Board assignment, GRA inspections, and Supervisors Room Assignments within **SynergyMMS**.

PerfectRoom works with many PMS systems. Consult your SynergyMMS Vendor for details.



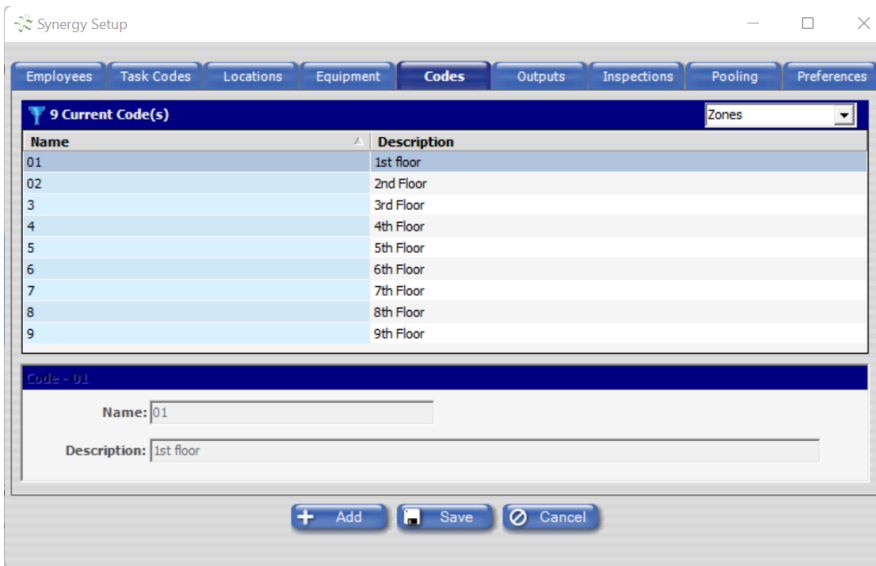
PerfectRoom Dashboard – Shows how the GRA’s are progressing through the day real time.

PerfectRoom Interfaces

- **Desktop** – Allows Auto and manual assignment and manipulation of GRA assignments, as well as room service assignments.
- **App (iOS/Android)**
 - GRAs are able to see their dynamic board and interact with their assigned rooms from anywhere real time.
 - Supervisors are able to update rooms conditions, reassign rooms, and perform inspections.
- **Printer** – Allows print off, of work assigned to the GRA. This could be used in combination with the IVR so the GRA knows the rooms to which they should be going.
- **IVR / Telephone** – Allows GRA’s to call in and get the next room as well as change the room status.

PerfectRoom Setup

- See the [Setup](#) area for more details on using the following screens.
- Properties can add, edit, or delete Zones, Loyalties, and Room layouts In the Codes Setup Section.

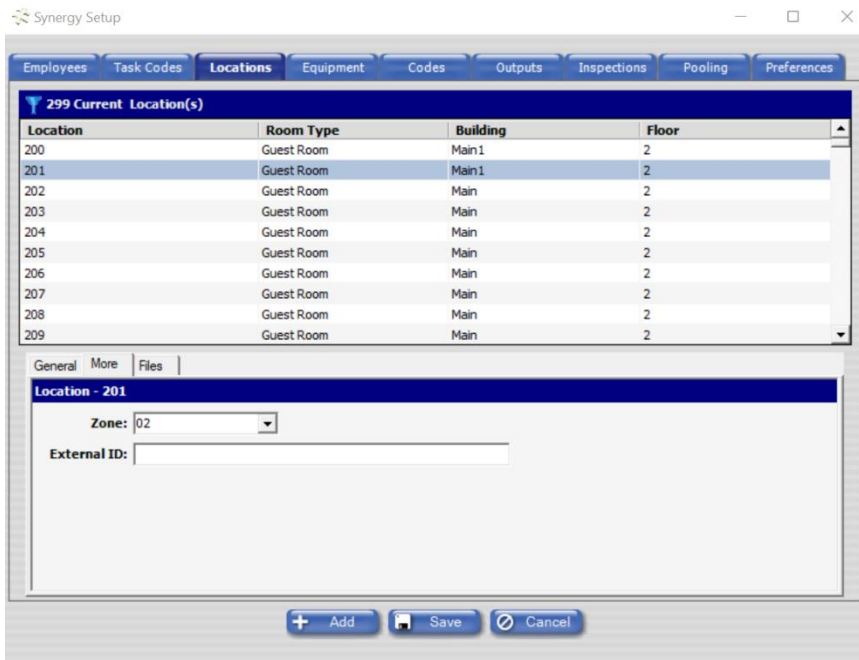


Under the Codes define your Zones, Loyalties, and Room Layouts.



Room Layout and Loyalties

- Locations get assigned Zones for the auto calculation and to make GRA room assignment easier.



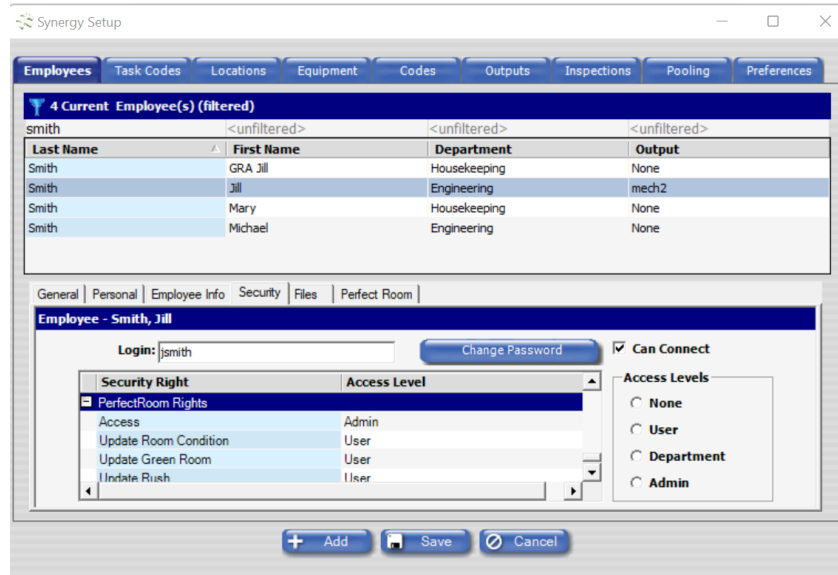
Note: A Location can only belong to one zone

Note: Multiple Locations can be selected and then with a right click you can update Layout and Zone one zone

- Within the Employees area you can setup all team members.

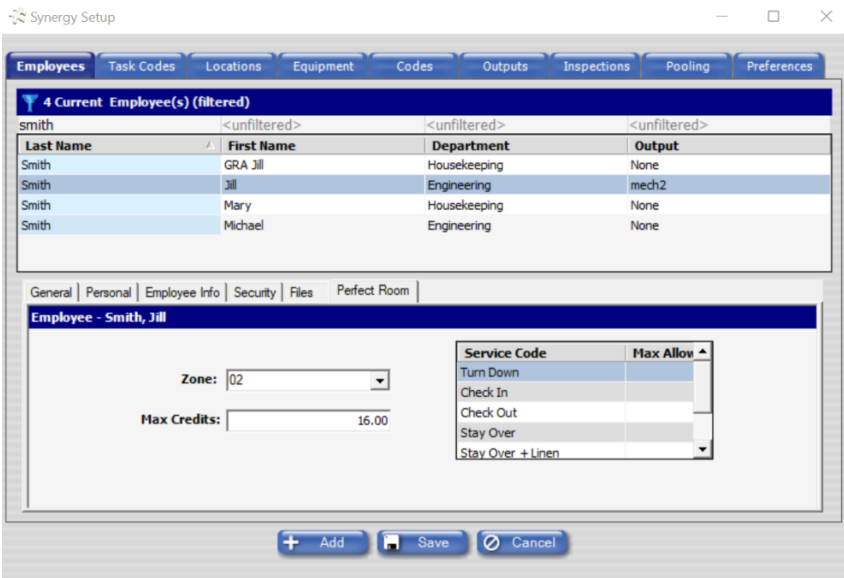
Note: An employee cannot be setup with rights as a GRA and a Supervisor. Only one of these rights can be given to each employee profile. If an employee could see themselves in both roles, they would need to have two employee profiles in SynergyMMS.

- Jill Smith – Supervisor
- GRA Jill Smith – GRA



- Security rights must be set and saved. This unlocks the PerfectRoom employee’s tab and gives access to Zone and Max Credits.
 - Room attendants are assigned Zones and Max Credits (how much work they are allotted).
 - Room attendants can also be set to a Max quantity of a particular service.

These are key items used for the AutoAssign calculation in SynergyMMS PerfectRoom.

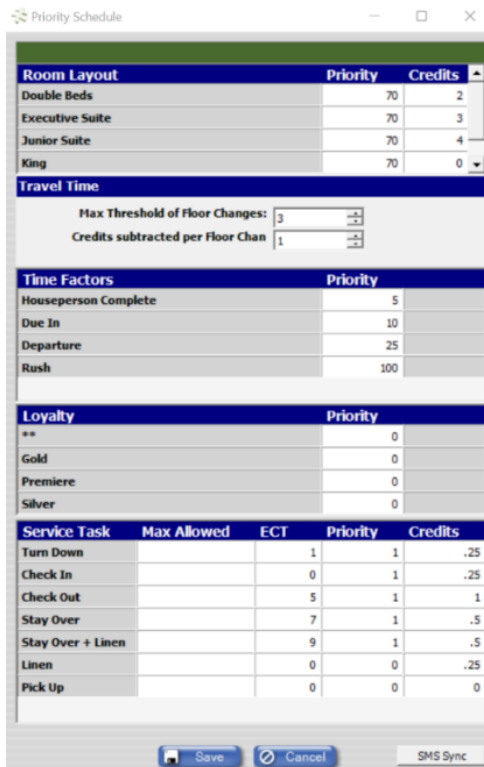


Note: More than one employee can belong to the same zone

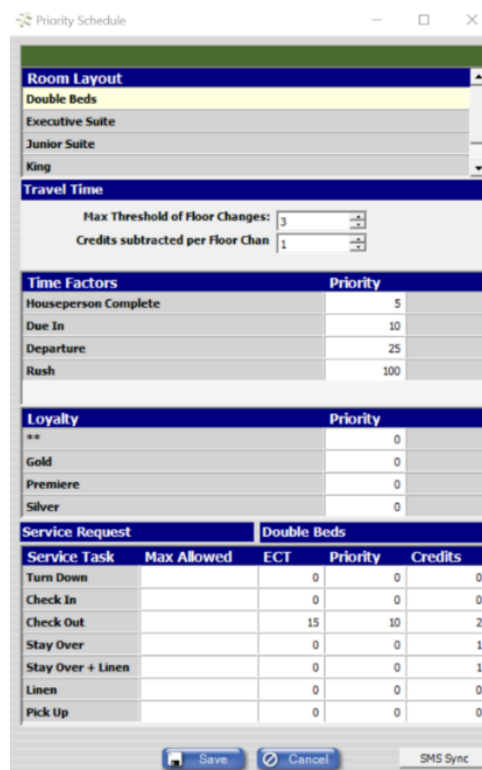
PerfectRoom Desktop - Priority Schedule (Simple vs Tiered)

The Priority Schedule allows you to set values that will affect how the house is opened and how it operates through the day.

- **Simple Mode** – Use this mode if your Services have the same credit value regardless of the room’s layout.
- **Tiered Mode** – Use this mode if your Services require different credit values depending on the room’s layout.



Simple Mode



Tiered Mode

- **Room Layout** – Defined in Setup / Codes. Must be set on each location.
 - **Priority** determines the order of importance for any item. The higher the number, the higher the priority.
 - **Credits** represent the amount of work required and used to calculate workload.
 - **Travel Time** – Used in correlation with Auto Assign to subtract credits assigned to a GRA.
 - **Max Threshold of Floor Changes** – The maximum amount of floor changes that can be done without losing one or more credits.
 - **Credits Subtracted per Floor Change** – How many credits should be removed if the above threshold is met.
 - ① **Note:** These rules are exclusively for the auto-assign feature. These rules will not prevent you from manually assigning rooms.
 - **Time Factors** – Adds to Priority points when action happens or is applied.
 - This list can be edited with the help of SynergyMMS Support.
 - **Loyalty** – Brand loyalty effects room priority, order to be done.
 - This list can be edited with the help of SynergyMMS Support.
 - **Service Task** – Services that can be assigned to rooms.
 - This list can be edited with the help of SynergyMMS Support.
 - **Max Allowed** – This is the maximum amount of that service that Auto-Assign will assign a GRA.
 - **ECT** – or estimated completion time, aids in measuring productivity
 - **Priority** – determines the order of importance for any item. The higher the number, the higher the priority.
 - **Credits** - represent the amount of work required and used to calculate workload.
- ① **Note:** Priority points can total and go over 100 if numbers are set high.

PerfectRoom Desktop - Room Assignments Screen

Room Assignments also known as Creating Housekeeping Boards. Used to pair up Guest Room Attendants (GRAs) with Rooms to perform the appropriate services daily.

There are 3 available options:

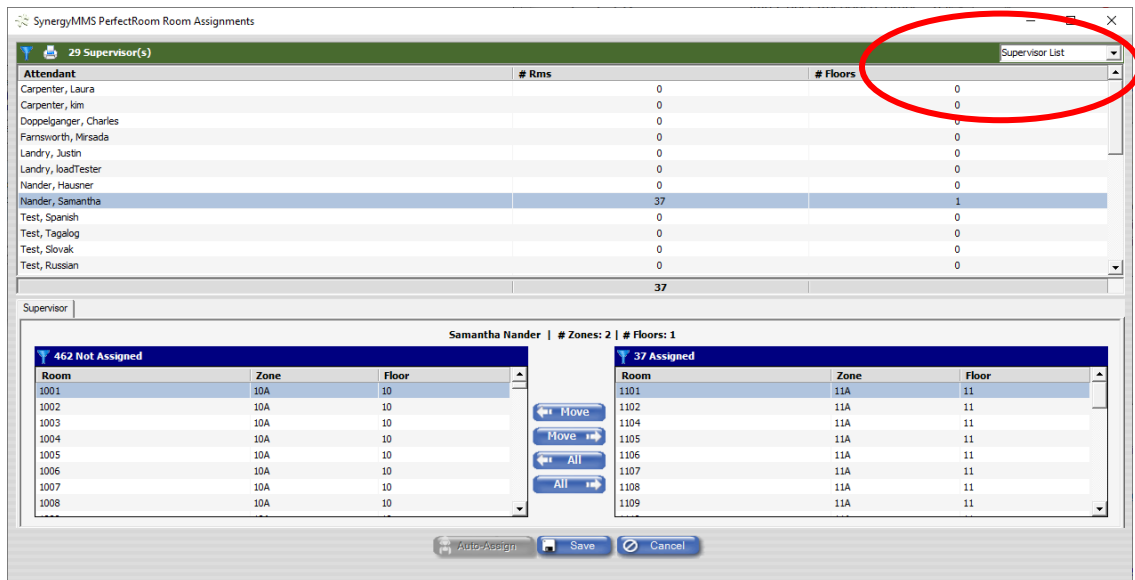
- GRA List
- Supervisors List
- Room List

- **GRA List** - Supervisors can see all GRA's with current assignments and progress in real-time.

The screenshot shows the 'SynergyMMS PerfectRoom Room Assignments' interface. At the top, there's a header for '12 GRA(s)' and a 'GRA List' dropdown. The main table lists GRAs with their respective zones, room counts, floors, checkouts, stayovers, completed services, workload, credits, and rush status. Below this, a detailed view for 'GRA1 Hskp' is shown, including 'Total Hours Assigned: 00:41', 'Total Credits Remaining: 0.00/5.00', '# Zones: 1', and '# Floors: 1'. This view is split into '14 Not Assigned' and '7 Assigned' rooms, each with columns for Room, Zone, Floor, Priority, Cond., Service, hspn, and Credits. At the bottom, there are 'Auto-Assign', 'Save', and 'Cancel' buttons.

- **GRA List (Top)**- You can see an overview of the GRA Boards for the day.
 - In the first column you can select if the GRA will be available for assignment today.
 - You can select this by right-clicking on the space in the column and selecting that GRA's Status.
 - **Attendant** – GRA Name in the Last Name, First Name format
 - **Zone** – The zone the attendant is assigned to.
 - **# Rms** – How many rooms are assigned to the GRA
 - **# Floors** – How many floors the GRA's rooms are on
 - **# CO** – How many Checkouts are assigned to the GRA
 - **# SO** – How many Stayovers are assigned to the GRA
 - **# Complete** – How many services the GRA has completed today.
 - **Workload** – Total time assigned to the GRA

- This is based on the ECT set in the Priority Schedule
 - **Credits** – Credits assigned for today/ Max Credits for that GRA
 - This is based on the credits set in the Priority Schedule
 - Max Credits are set in the Employee area of setup
 - **# Rush** – How many rooms on the GRA’s board were rushed today
 - **GRA List (Bottom)**- Supervisors can assign users to the GRA’s
 - GRA Assignment Steps
 - Select the GRA you want to assign rooms to.
 - Move the rooms in the left box (Not Assigned Rooms) to the right box (Assigned Rooms)
 - Click Save, then repeat for all GRA’s
 - **Supervisors List** - If you click the drop-down in the top right corner you can toggle to the Supervisors List
 The Supervisors List allows assignment of specific rooms to a Supervisor.



- **Rooms List (Top)** – If you hit the drop-down in the top right corner you can toggle to the Rooms List

The Rooms list will show all rooms and details. The Details can be customized. Contact your vendor. If a room is not shown here that exists in the property double check your Setup – Locations.

SynergyMMS requires a match of your input locations and the PMS feed.

SynergyMMS PerfectRoom Room Assignments

Suite	Room	Zone	Due In	Priority	VIP	Occ.	Attendant	Cond.	Service	ECT	Credits	Arrival	Departure	Status	Rush
8000		Zone 8	180				Winters, Betty	VC	X	40	3.00				
8002		Zone 8	180				Winters, Betty	VC	X	40	3.00				
1004		Zone 1	170				Attendant, Room	VC	X	40	2.60				
6004		Zone 6	170				Lawrence, Dawn	VC	X	40	2.60				
2005		Zone 2	105			4	Cedar, Jessie	OC	X	40	2.00	2/12/2022 11:00...	2/18/2022 11:00...		
4002		Zone 4	70				jones, jeff	VD	X	40	2.60	2/18/2022 11:00...	2/18/2022 11:00...		
4005		Zone 4	70				jones, jeff	VD	X	40	2.60	2/15/2022 11:00...	2/18/2022 11:00...		
6008		Zone 6	70				Lawrence, Dawn	OD	X	40	2.60	2/12/2022 11:00...	2/18/2022 11:00...		
2000		Zone 2	65		2	3	Cedar, Jessie	OC	X	40	2.00	2/17/2022 11:00...	2/18/2022 11:00...		
8006		Zone 8	65			4	Winters, Betty	VD	X	40	2.00	2/16/2022 11:00...	2/18/2022 11:00...		
1006		Zone 1	15				Diaz, Martha	VC		20	1.30				
1014		Zone 1	15				Diaz, Martha	VC		20	1.30				
3001		Zone 3	15				Cheatwood, Kim	OD		20	1.30	2/13/2022 11:00...	2/19/2022 11:00...		
5002		Zone 5	15					VC		20	1.30	2/17/2022 11:00...	2/19/2022 11:00...		
6005		Zone 6	15				Lawrence, Dawn	OD		20	1.30	2/17/2022 11:00...	2/19/2022 11:00...		
2001		Zone 2	10				Cedar, Jessie	VC		20	1.00				

Details | History

Details - Room 5002

Guest Name: TAMARA FRANKS
 Guest VIP:
 Loyalty:
 Group:
 Room Layout: King
 Arrival: 2/17/2022 11:09 AM
 Departure: 2/19/2022 11:09 AM

Special Requests:
 Comments:
 Linen Change Today








Due In Guest
 Guest Name:
 Arrival:
 Departure:
 Loyalty:
 Group:

Auto-Assign Save Cancel

Service Request only show for the current day. Multiple services can be assigned to a room in a day.









- **Room** – Guestroom Location
- **Zone** – Zone assigned to the location in the Setup area of SynergyMMS
- **Priority** – This is the calculated addition of priority points for the room based on:
 - Auto Assign or manual service assigned value.
 - Room Layout service value if Tiered
 - Time Factor priority value.
 - Loyalty value.
- **VIP** – VIP status of the Guest based on what is sent from the PMS.
- **Occ** – Number of occupants in the room.
- **Attendant** – Attendant either auto assigned or manually assigned to service the room.
 - An icon of a person will display
 - Green Person - Available
 - Yellow Person – On Break
 - No person – Not available. This would mean that the room was assigned manually to a GRA that was marked as available today.
- **Condition** – The current condition of the room
- **Service** – Service assigned to the room either through the Auto Assign or manually.
 - See Auto Assign Calculation of service below.

* Mouse over any of these icons in the desktop to show the meaning.

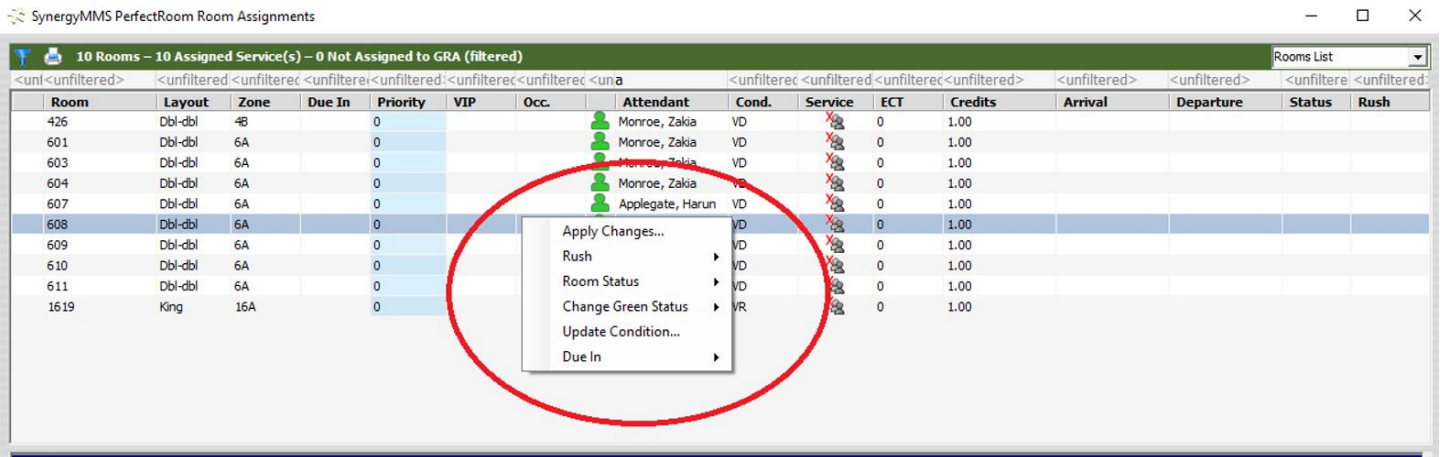
-  - Linen change – Notes a change of linen. Manual assignment.
-  - Pick up – Assignment for RA to Pick Up the room and make it ready for a guest. Possibly the room has not been occupied and needs a quick dusting. Manual assignment.
-  - Turn Down – Turn down service of turning down the sheets placing chocolate on pillow. Manual assignment.
-  - Check out – Auto Assigned.
-  - Check In – Assignment for RA to check on room and make sure it is good for the check in of a guest.
 - Possibly the room has not been occupied and needs a quick dusting. Manual assignment.
-  - Stay over – Auto Assign. Daily. Configurable.
-  - Stay Over with Linen Change – Auto Assigned on 3rd day of stay. Configurable.

SynergyMMS Allows for Configuration of the Auto Assigned service contact your local Vendor for details.

Note: Service names can be customized for an ownership or brand if the PMS needs.

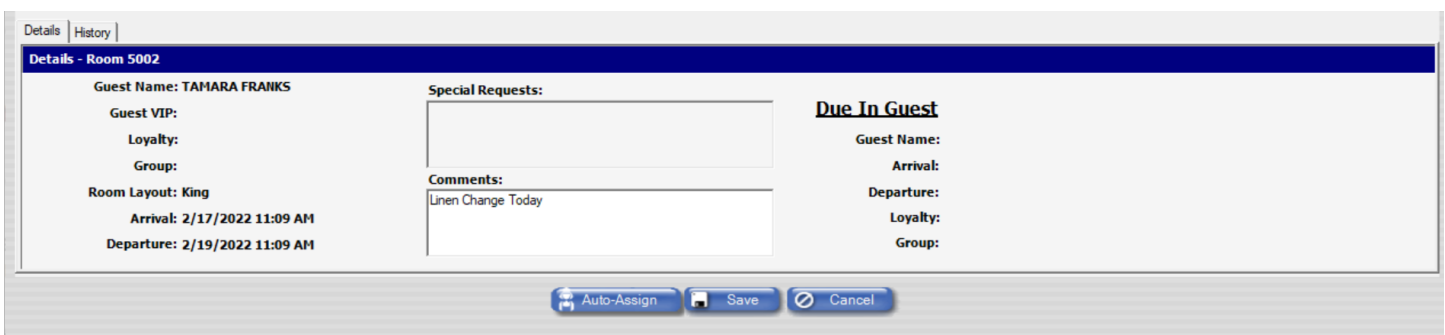
- **ECT** – Estimated completion time, how long the task should take.
- **Credits** – How many credits are applied based on the service, and room layout.
- **Arrival** – Arrival date of the guest.
 - In most cases this contains the time sent from the PMS
 - Some PMS's will not include a check in time, so this can be turned off with a Preferences consult your vendor
- **Departure** – Departure date of the guest.
 - Some PMS's will allow and send departure time. Consult your vendor.
- **Status** – Where the room is relative to the service being done.
 - * Mouse over any of these icons in the desktop to show the meaning. Some will include extra details.
 -  - Room Completed
 -  - GRA in room
 -  - Return at a later time.
 - Mouse over will show time to return
 -  - Room Stopped, but not completed.
 -  - Do not disturb.
 -  - Service refused.
 - * Time service was started will be available with a mouse over of the icon.
- Room Rush -  - Adds priority point value from the priority schedule
- Green Room –  - When set this room will not be assigned a service until the guest checks out.

○ **Right Click Menu for the Rooms List**



- A room or group of rooms can be selected and then right clicked to do the following:
 - **Apply Changes** – Changes GRA, Service and offers a means to add comments.
 - When you manually assign the service, you will also manually assign the GRA.
 - **Rush a room** – Can set or remove the Rush from the room. Adjusts the Priority Points.
 - **Room Status** – Can set Do not Disturb, Return Later, or Service Refused or can clear any of these or a complete check mark.
 - **Change Green Status** – Set room as Green. See Green Room details.
 - **Update Condition** – Allow for the room Condition to be updated. If an outstanding service is assigned to the room, it can be completed at that point also.
 - **Due In** – Allows the room to be marked as Due in. Adjusts Priority Points when room goes Vacant. Can be passed from the PMS.

○ **Rooms List (Bottom - Details Tab)**



- **Left Side** – Guest information from the PMS
- **Special Requests** – Codes from the PMS that can be assigned to Task Codes to create WR automatically.
- **Comments** – PerfectRoom added to/edited from PerfectRoom Desktop and the PerfectRoom App.

Comments are retained until the room goes vacant after being occupied.

The comments allow all team members to understand previous requests of the guest. If Susan is the GRA on Monday and the Guest requests that their clothes are not touched. Susan can note that in the comment. The comment will be there for her or for any GRA until the existing Guest checks out.

- Some PMS will send comments instead of Special Requests. Consult your vendor for details.
- **Due In Guest** – May give you the next Guests information from the PMS. Depending on the PMS Interface and how your Front Office pre assigns guests to rooms.
- **Rooms List (Bottom - History Tab)** – Displays the recent history of the room selected.

Event	When	Action By	Service	Status	Arrival	Departure	Condition
Auto-Assign	2/18/2022 11:34 AM		Stay Over		2/17/2022 11:09 AM	2/19/2022 11:09 AM	
Auto-Assign	2/10/2022 11:16 AM	Clark, John	Check Out		2/6/2022 11:14 AM	2/10/2022 11:14 AM	
Edited	1/31/2022 3:29 PM	Wettle, Corey	None				
Edited	1/31/2022 3:26 PM	Wettle, Corey	None				
Auto-Assign	1/31/2022 3:22 PM	Wettle, Corey	Check Out		1/30/2022 11:14 AM	1/31/2022 11:12 AM	
Return Later	1/10/2022 2:13 PM	Cedar, Jessie					

Shows all details for the last 4 unique check ins. Unique is where the Guest Number does change.

Print Options in PerfectRoom

GRA List

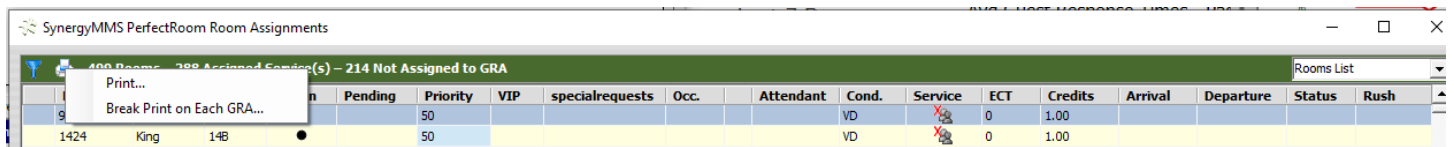
Attendant	Zone	# Rms	# Floors	# CO	# SO	# Complete	Workload	Credits	# Rush
Doppelganger, Miriam	11B	9	1	9	0	0	0 Hr(s) 0 Min	9.00/24.00	0
Edwards, Maria	15A	10	1	10	0	0	0 Hr(s) 0 Min	10.00/24.00	0
Henry, Abdul	16A	9	1	9	0	0	0 Hr(s) 0 Min	9.00/24.00	0
Applegate, Nora	16B	10	1	10	0	0	0 Hr(s) 0 Min	11.00/24.00	0
Swartzentruber, Sayedul	4B	0	0	0	0	0	0 Hr(s) 0 Min	0.00/24.00	0
Peralta, xxx		0	0	0	0	0	0 Hr(s) 0 Min	0.00/0.00	0
Gentry, HOO		0	0	0	0	0	0 Hr(s) 0 Min	0.00/0.00	0
Fernsworth, Mirsada- RA		0	0	0	0	0	0 Hr(s) 0 Min	0.00/0.00	0
Zion, Fatma-RA		0	0	0	0	0	0 Hr(s) 0 Min	0.00/0.00	0
Applegate, Pedro		0	0	0	0	0	0 Hr(s) 0 Min	0.00/0.00	0
Carpenter, Kevin	14A	0	0	0	0	0	0 Hr(s) 0 Min	0.00/0.00	0
Monroe, Miranda	9A	0	0	0	0	0	0 Hr(s) 0 Min	0.00/0.00	0
Thorpe, Ana	8B	13	1	13	0	0	0 Hr(s) 0 Min	13.00/24.00	0
Thorpe, Gladys	6B	11	1	11	0	1	0 Hr(s) 0 Min	11.00/24.00	0

Supervisors List

Report		
29 Supervisor(s)		
3/18/2022 8:47 AM		
Attendant	# Rms	# Floors
Carpenter, Laura	0	0
Carpenter, kim	0	0
Doppelganger, Charles	0	0
Farnsworth, Mirsada	0	0
Landry, Justin	0	0
Landry, loadTester	0	0
Nander, Hausner	0	0
Nander, Samantha	37	1
Test, Spanish	0	0
Test, Tagalog	0	0
Test, Slovak	0	0
Test, Russian	0	0

Room List

From the Rooms page you have two options



Simple Print give you all rooms details

Report															
499 Rooms - 288 Assigned Service(s) - 214 Not Assigned to GRA															
3/18/2022 8:49 AM															
Room	Layout	Zone	Due In	Pending	Priority	VIP	specialrequ	Occ.	Attendant	Cond.	Service	Credits	Arrival	Departure	Status
927	King	9B			50					VD		1.00			
1424	King	14B	●		50					VD		1.00			
402	King	4A		0	0			1		OD			3/14/2022 1	3/19/2022	
403	Dbl-dbl	4A		0	0			1		OR			3/16/2022 1	3/20/2022	
404	Dbl-dbl	4A		0	0			1		OR			3/17/2022 1	3/20/2022	
405	Dbl-dbl	4A		0	0			1		OD		1.00	3/14/2022 1	3/18/2022	
406	Dbl-dbl	4A		0	0			1		OR			3/16/2022 1	3/20/2022	
407	Dbl-dbl	4A		0	0			1		OD		1.00	3/14/2022 1	3/18/2022	
408	Dbl-dbl	4A		0	0			1		OD			3/14/2022 1	3/19/2022	
409	Dbl-dbl	4A		0	0			1		OD			3/14/2022 1	3/25/2022	
410	Dbl-dbl	4A		0	0			1		OD			3/14/2022 1	3/19/2022	

Break print on GRA give you printed boards per Room Attendant

Report															
499 Rooms - 288 Assigned Service(s) - 214 Not Assigned to GRA															
3/18/2022 8:50 AM															
Room	Layout	Zone	Due In	Pending	Priority	VIP	specialrequ	Occ.	Attendant	Cond.	Service	Credits	Arrival	Departure	Status
421	King	4B			0			1	Thorpe, Nat	OD		1.00	3/14/2022 1	3/18/2022	
422	King	4B			0			1	Thorpe, Nat	OD		1.00	3/14/2022 1	3/18/2022	
423	King	4B			0			1	Thorpe, Nat	OD		1.00	3/15/2022 1	3/18/2022	
424	Dbl-dbl	4B			0			1	Thorpe, Nat	OD		1.00	3/14/2022 1	3/18/2022	
425	Dbl-dbl	4B	●		0			1	Thorpe, Nat	OD		1.00	3/14/2022 1	3/18/2022	
426	Dbl-dbl	4B	●		0			1	Thorpe, Nat	OD		1.00	3/17/2022 1	3/18/2022	

SynergyMMS Auto-Assign Calculation

The “Auto-Assign” button assigns check out, stay over, and linen change tasks automatically allowing a supervisor to complete the assignment of a majority of tasks in a single click.

The basics of how the Auto-Assign calculation works:

1. Evaluate what service is needed in a room.
 - Checkouts (Default)
 - Check if check out date is today, then a check out service is applied.
 - Check all previous day’s check out services, if any were not completed, then a check out service is applied.
 - Stay Over (Default)
 - Check if Green Status is enabled.
 - Green Status – No services will be assigned during the guest’s stay.
 - Check if guest is due a linen change, if so, a Stayover with Linen Change is applied.
 - All other occupied rooms are assigned a Stayover Service.
 - ❖ Other services **PerfectRoom** includes can be assigned manually. These include Pickup, Turn down, and Check In.
2. Calculate the priority
 - All priorities are summed together, and the result forces the sort order of the rooms.
3. Evaluate the Service Credits
 - Uses Room Layout credits and the service credits and multiplies them.
4. Assign work to each GRA based on allowed credits and appropriate zone.

Note: When starting up a new property with PerfectRoom. The first time the Auto Assign is pressed it is possible that a service **is not** assigned to a room. If a room is not occupied and no service has ever been finished (completed) in SynergyMMS then a service **will not** be assigned via the Auto Assign. A room where no service has been assigned will need to be manually assigned a service and the service will need to be finished via SynergyMMS. Rooms must be finished in SynergyMMS for **SynergyMMS** to know how to Auto Assign rooms.

Note: Default cleaning schedules in **PerfectRoom** are as follows. This may be configured per the property to fit any special situations. These settings are done by you **SynergyMMS** Vendor.

Stayovers = Daily

Stayover & Linen = After every 3rd night of a Guest’s stay.

Note: Skip Condition - **PerfectRoom** can be set to skip an auto assigned service if the conditions match the preference. Example OOO or OOS. Some properties also want services not assigned if the room condition is Occupied Ready or Occupied Clean. Contact Support to have them set this.

Note: **SynergyMMS** Will generally be able to AutoAssign most services. It is a good rule to check the Rooms list for dirty rooms that didn’t get a service so they can be assigned if needed.

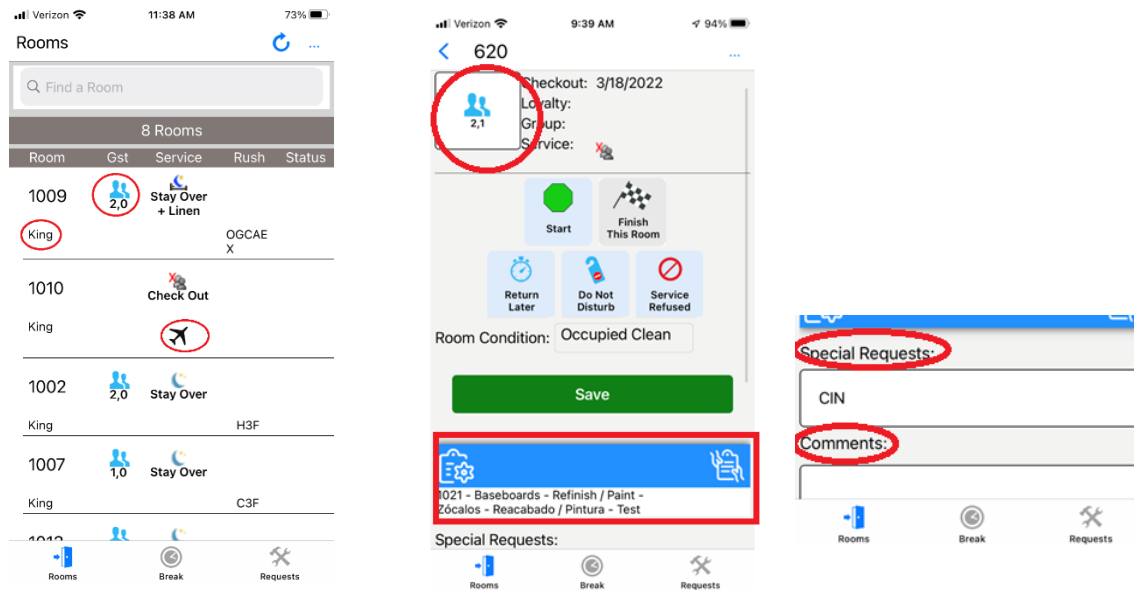
Note: Rooms should be check after AutoAssign, Mid day and end of day, relative to early check outs or extended stays. Some properties will also create WR from the FD to dispatch to the Hskp teams.

PerfectRoom Mobile App

Downloading the PerfectRoom Mobile App allows users to leverage the power of the SynergyMMS desktop in their mobile device.

1. Available in 8 languages.
English, French, Spanish, Polish, Arabic, Hungarian, Romanian and Bulgarian.
2. Supervisors can accomplish most tasks that are available from the desktop, which allows them to be mobile.
3. GRAs can easily interact and view their assignments as well as details regarding the room and/or guest.

GRA's Mobile View in PerfectRoom



The GRA is presented with a list of rooms to be serviced today.

The List by default shows the Room, GST, Service, Rush State, and Service State (Completed, DND, Service Refused or Return later. There is a second row of data that can be customized to show additional information such as Due in ✈️, Room Layout, Group or even the count of WR created today in PR. Contact your SynergyMMS Vendor for details and customizations.

The Form can show the Guest name or not, as well as basic information about the guest. The buttons are the state the GRA will put the room in as they start the room and finish it. The PMS Preferences are displayed, and Comments can be displayed or added to for the current guest. Comments will clear when the room goes vacant

The comments allow all team members to understand previous requests of the guest. If Susan is the GRA on Monday and the Guest requests that their clothes are not touched. Susan can note that in the comment. The comment will be there for her or for any GRA until the existing Guest checks out.

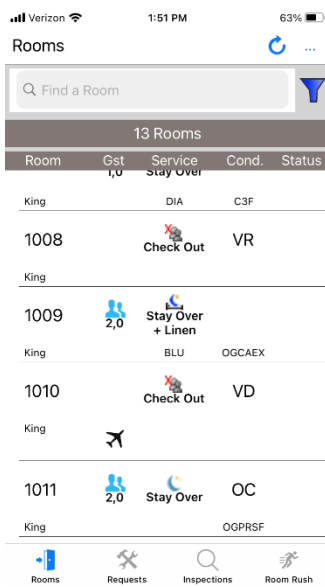
When the room is Finished if the GRA has rights to update the condition they will put the room in the correct state. PerfectRoom can also adjust the condition automatically to clean regardless of the GRA rights based on a preference. Contact your SynergyMMS Vendor for Details.

The order the GRAs rooms are sorted is relative to the calculated priority of the room. Progress through rooms can be forced to that order by a preference. The Preference is defaulted off. If the Preference is on, rooms must be completed in order. With the preference off, the GRA may choose which room to complete next from their device. *Contact SynergyMMS Vendor if you would like this setting turned on.*

Supervisor’s View in PerfectRoom


Supervisors can log into PerfectRoom via the mobile app to:

- Check a room’s current status
- Check which GRA last cleaned a room
- Conduct follow-up inspections

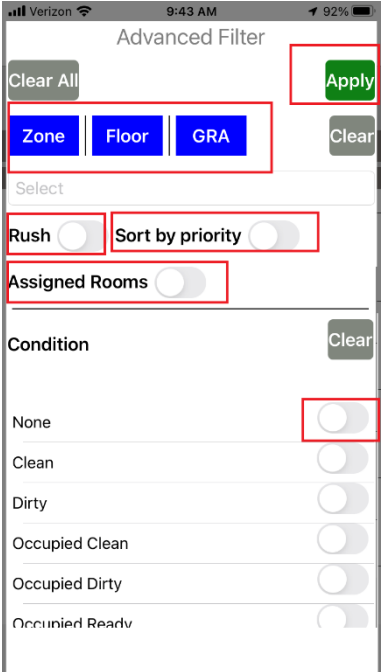
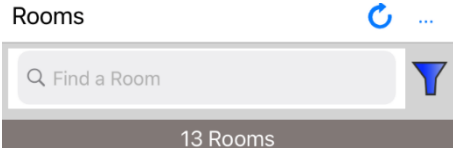


The Supervisor is presented with a subset of rooms or the whole list of rooms depending on assignment from the desktop, and how they filter the list.

The List by default shows the Room, GST, Service, Condition, and Service State (Completed, DND, Service Refused or Return later).

There is a second row of data that can be customized to show additional information such as Due in , Room Layout, Group or even the count of WR created today in PR. Contact your SynergyMMS Vendor for details and customizations.

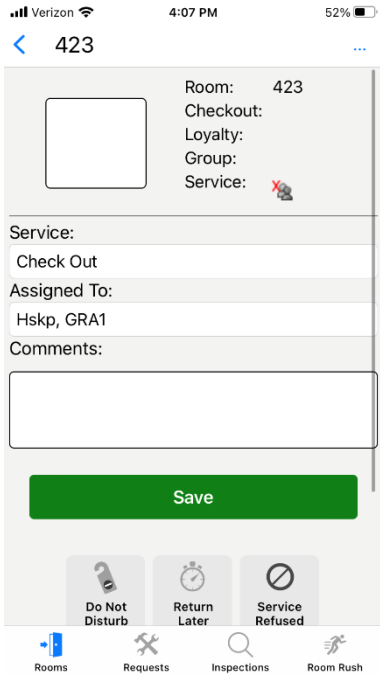
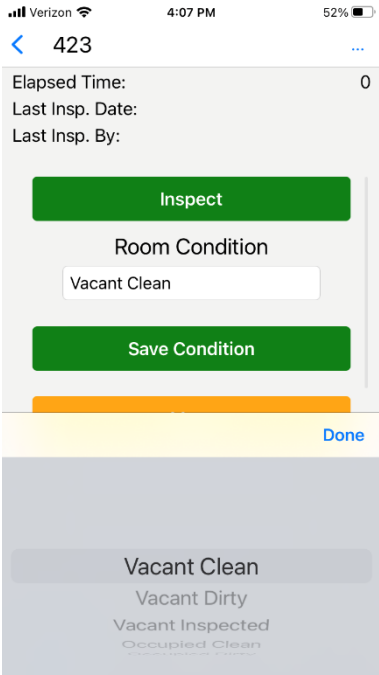
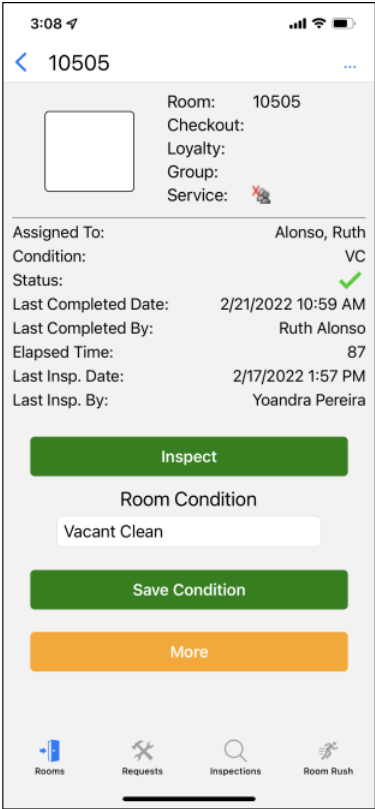
The Supervisor have the ability to Filter the list using the blue Filter icon.



- Filters can be applied for:
- Zone, Floor, GRA
 - Rush
 - Assigned Rooms.
- Supervisors can also sort by Priority.
- Additional filters include:
- Room Condition
 - Status
 - Service

The Form can show the Guest name or not, as well as basic information about the guest. PMS Preferences and Comments can be displayed or added to for the current guest.

Items can be updated as needed.



Rooms can also be Inspected:

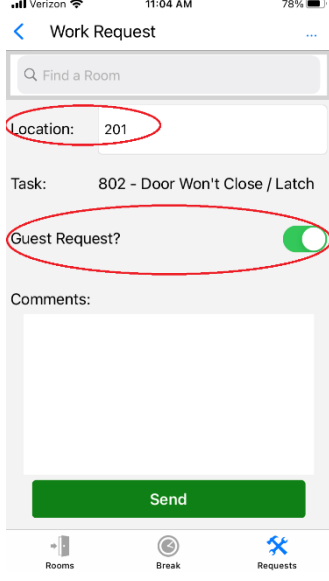
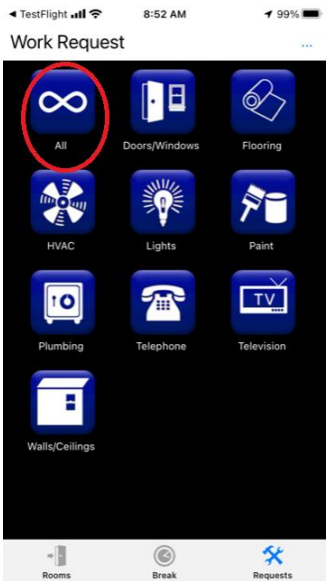


Work Requests in PerfectRoom

Both Supervisors and GRAs can create work requests in the mobile app or using *EnterpriseVoice*.

The app displays a grid picturing common room issues in which GRAs may be faced. By selecting a Category picture, a user will be presented Task Codes relative to the picture to select from. The user can also choose the All Category and search for the correct Tasks. Once a Task is selected a WR form will display.


If the user has Started the room the room number will be filled in, if not a room will need to be selected. If the issue was reported by the guest, the slider can be set to true. Any further comments can be added and then the user will click Send to Save and dispatch the WR. Work Requests that fit the dispatching rules in *SynergyMMS* to be dispatched appropriately.



Employee Availability

- Through the Mobile App a GRA can put themselves on break which will make them temporarily unavailable.
- By right-clicking and selecting the option, supervisors can adjust the availability of a GRA based on their work schedule or vacation.
- If an employee is marked unavailable, they will not be assigned rooms during the auto-assign process.

Room Rush

- GRAs will be notified of rushed rooms with the rush icon () in the mobile app.
- Supervisors can rush rooms via desktop or Mobile App.
- GRAs can rush rooms if they have the necessary right.

Comments:

- Comments can be added to a room at any time. If a RA is assigned a service, they will see the comments on their device.
- Comments do persist day after day until the Guest Checks out.

Chapter 10 SynergyMMS: Interfaces

SynergyMMS – Allows for interface to Property Maintenance Systems - PMS programs, third-party vendors, and to our Building Automation Program Control IQ.

Property Maintenance Systems – PMS

SynergyMMS works with many PMS systems. The scope of data provided is relative to the PMS vendor themselves. You should consult with your **SynergyMMS** and PMS vendor for details.

- One of the key differences is that some PMS's send Condition for the Room.
 - If the PMS does send Condition, that condition supersedes **SynergyMMS** and is used.
 - If the PMS does not send condition, **SynergyMMS** has a Logical Condition update – With the release of 3.7.4.13 SynergyMMS uses data received based on Check-in and Check-out to correctly set the condition of the room.
 - Example: If we see a check in on a room that was VC, we can change it to OC. **SynergyMMS** also offers a night audit to correctly update rooms to OD. When the room is then seen as checked out the condition is set to VD.
 - For the Logical condition updates to work, changes in room conditions must be made in **SynergyMMS**.
 - Logical changes made by the system are not sent to the PMS as it has its own update process.
 - Changes made by an employee do flow to the PMS.
- **SynergyMMS** always provides the PMS with updated condition of the room.

With most of the PMS's if there is an interruption in the connection, when the connection is once again established **SynergyMMS** will request a sync of all rooms in order to update any records that were missed.

Some PMS's do not allow the Sync on the **SynergyMMS** side, so they must be contacted and asked to preform the Sync. Consult with your **SynergyMMS** and PMS vendor for details

SAI offers two interfaces based on the PMS.

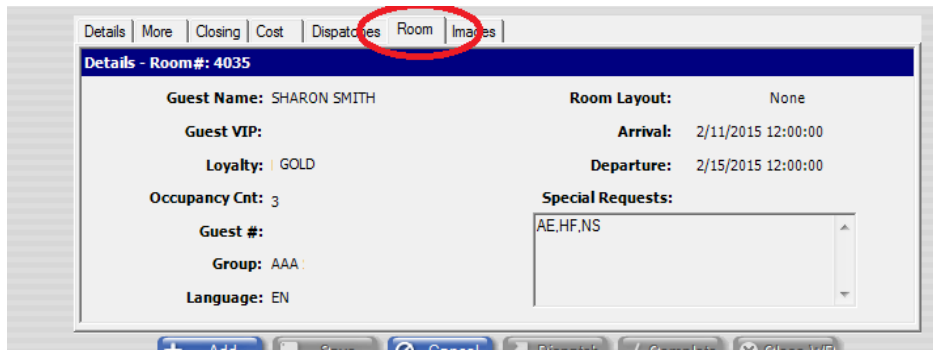
Installed – This is a local install on a property PC. For this an IP and port are required.

Cloud – SAI works with the property or the PMS system to establish connection.

There are three primary benefits from the interface:

1. **Auto-populate Guest Name on Work Request** –When creating a work request in the program, selecting an occupied room prompts **SynergyMMS** to automatically fill in the name of the guest on the work request. This will save considerable time and ensure accurate data entry. **SynergyMMS** also displays basic guest information in the Room tab of the WR.

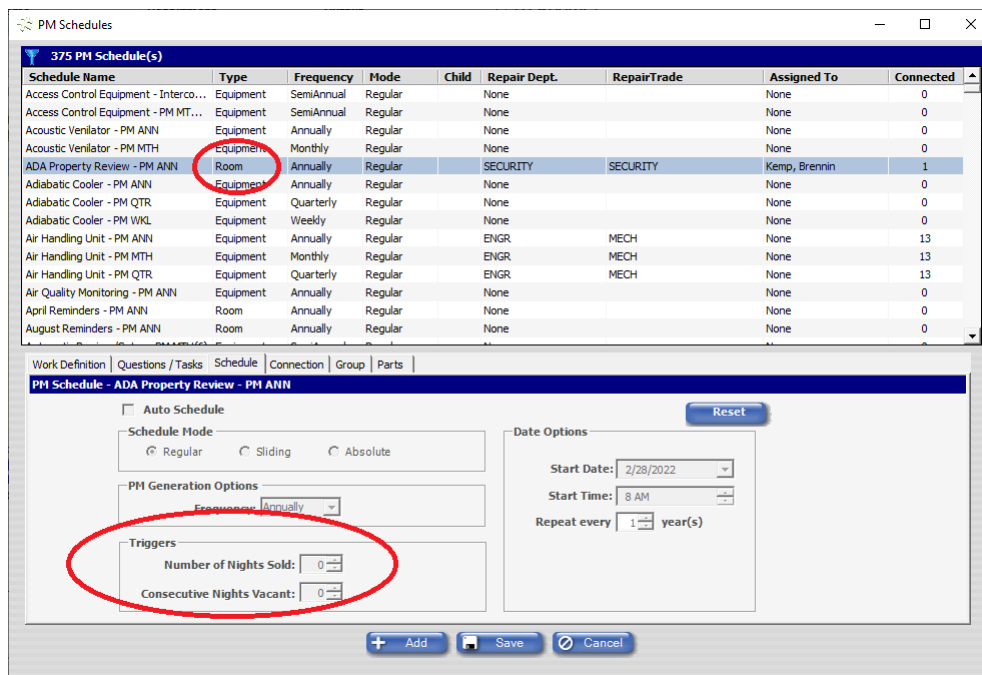
It should be noted that when a user creates a work request and selecting the location automatically populates the guest's name, the user still has the option to check the "guest" checkbox indicating it is an actual guest-related work request.



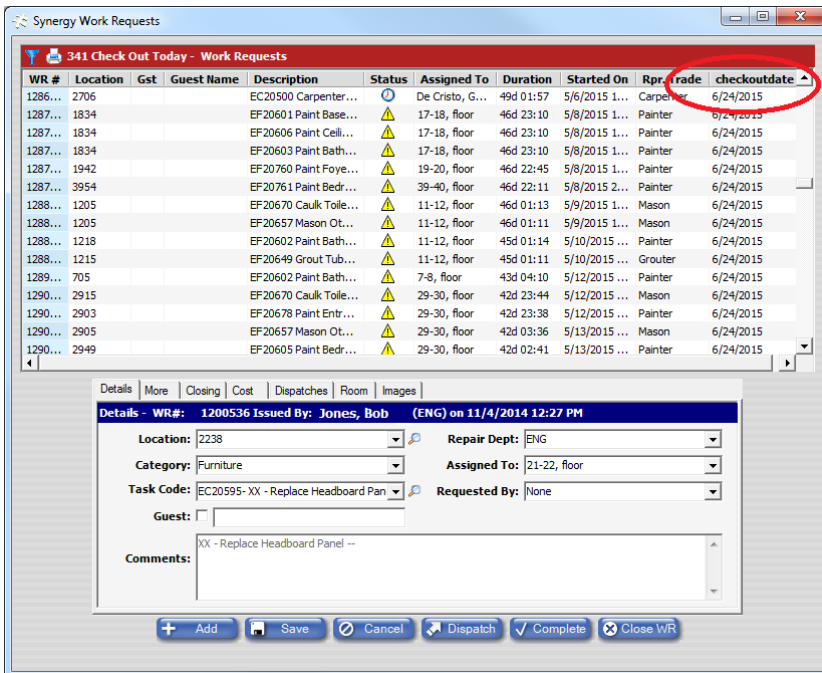
2. **PM On Demand** – The PM On Demand screen in SynergyMMS has the ability to interface to the PMS to display current occupancy information. This is valuable information as users will now be allowed to “see” which rooms are currently sold and which ones may be available for preventive maintenance or other work.
3. **Room occupancy**
 1. **Occupied**
 2. **Lack of Occupancy**

The need for Room PM can vary based on the nights the room is occupied or nights it is not occupied.

SynergyMMS captures and stores information about each room and keeps a count of how many nights that room has been sold or remained vacant. You can set threshold values in your PM tasks, such as deep clean or carpet shampoo, so that they trigger when the appropriate number of room nights have been reached. This way the rooms that need the most attention can get it while those that may not need quite as much are not cleaned excessively. Your staff will be better focused on areas of the building that need their attention with the **Room Threshold** feature in SynergyMMS. You can also schedule Room PM based on the number of nights a room has set vacant. Dust and Flush.



- Custom Views** –Custom views can also be written to show active WR in rooms where guest is checking out or WR in rooms that are vacant right now. *Note: The feed of data is live so a check-in on the PMS does not show in SynergyMMS until it happens, so before doing work team members should check with the Front office.*



This view shows rooms checking out today.

Having this information allows you to organize and better plan the day for the team.

CUSTOM VIEW WITH CHECK OUT DATE

Third Party Interfaces

We have an extensive list of Third-Party Vendors we work with to better serve you. View the list below and contact SynergyMMS Support for any questions on how to connect the systems.

Currently Available:

BluIP - <https://www.bluip.com/>

Honeywell - <https://buildings.honeywell.com/us/en/brands/our-brands/bms>

InnSpire - <https://www.innspire.com/>

Intelity - <https://intelity.com/>

Interel - <https://interel.com/>

Kipsu - <https://www.kipsu.com/>

OpenKey - <https://www.openkey.co/>

SmartHotel - <https://www.smarthotel.nl/en/>

Volara - <https://volara.io/home-page>

wi-Q - <https://www.wi-q.com/>

Coming Soon:

FourteenIP - <https://fourteenip.com/>

Hawaii Energy Systems - <https://www.hawaiienergysystems.com/>

Seam Group - <https://www.seamgroup.com/>

CONTROLIQ

Systems Associates, Inc. has created an interface between our Maintenance (**SynergyMMS**) and Automation (**CONTROLIQ**) systems. The purpose is to pull run-time hours from equipment in **CONTROLIQ** (CIQ) for preventive maintenance as well as to provide an alternate method of communicating alarms from CIQ.

Software Requirements for CONTROLIQ Interface

A property interested in using this capability must have installed the following:

- Windows 10 Professional
- .NET Framework - all through version 4.0
- Always-on internet connection
- **SynergyMMS**
- **CONTROLIQ**

Equipment Setup

In order for **SynergyMMS** and CIQ to work together properly it is important that there exist corresponding pieces of Equipment in **SynergyMMS**. The CIQ Alias field in Equipment setup is the link that allows the two applications to communicate effectively. This field joins the Equipment used in **SynergyMMS** for Preventive Maintenance and Control Points (or simply Points) within CIQ. It also is used in Alarm situations. Equipment that corresponds to a CIQ Point in Alarm will be used in **SynergyMMS** as the location for a Work Request.

The screenshot shows a software interface for equipment setup. At the top, there are tabs for 'General', 'Serves', 'Data Sheets', and 'Files'. Below the tabs is a title bar that reads 'Equipment - ACU-008-3-VALET SHOP A/C UNIT'. The main area contains several input fields:

- Name:** ACU-008-3-VALET SHOP A/C UNIT
- Manufacturer:** CARRIER
- Model:** (empty)
- Serial:** (empty)
- Date Installed:** 1/ 1/1990
- Warranty Date:** 1/ 1/1990
- Department:** eng
- Location:** B2-BLD-3
- Type:** None
- CIQ Alias:** (empty)
- Barcode:** 12345678901234567890

A red arrow points from the text below to the 'CIQ Alias' field.

Equipment Setup Form

Enter the CIQ Alias here and SynergyMMS will check the run-time hours nightly

ⓘ Note: The CIQ Alias field within the PM Schedule General Tab must correspond to the name of the alias exactly in order for the process to work properly. CIQ Aliases cannot contain spaces.

Run-time Hours for SynergyMMS

This aspect of the interface is designed to gather the hours of use from CIQ placing the information into the SynergyMMS database. SynergyMMS' PM Generator gathers the information based on the CIQ Alias listed in the Equipment Setup form of SynergyMMS. Once the run-time hours for the corresponding equipment match the preset level in the PM Schedule SynergyMMS will trigger a new Work Request for that schedule and reset the internal counter.

The screenshot shows a software window titled "PM Schedules" with a list of 102 active schedules. The "Lobby AHU" schedule is selected, and its configuration is shown in a detailed view below. A red arrow points to the "Equip Run Hours" field, which contains the value "100".

Schedule Name	Type	Frequency	Mode	Repair Dept.	Repair Trade	Assigned To
Lexington Avenue Entr	Equip	Custom	Regular	None	None	None
Lexington Avenue Entr	Equip	Custom	Regular	None	None	None
Lexington Avenue Entr	Equip	Custom	Regular	None	None	None
Lexington Powerwash	Equip	Custom	Regular	HOUSEKPNG	HSKP-PS-PM	None
Lobby AHU	Equip	Monthly	Sliding	None	None	None
Lobby Clock	Equip	Custom	Regular	None	None	None
Lobby Edging	Equip	Custom	Regular	None	None	None
Lobby High Dusting	Equip	Custom	Regular	None	None	None
Lobby Wall Polish	Equip	Custom	Regular	None	None	None

PM Schedule - Lobby AHU

Auto Schedule

Schedule Mode

Regular Sliding Absolute

PM Generation Options

Frequency: Monthly

Equip Run Hours: 100

Date Options

Start Date: 10/17/2006

Day of the week: Any

+ Add Save Cancel

Deletion of specified PM successful.

PM Schedules Form

Enter the run-time hours here

Note: When using SynergyMMS and CIQ together in this method you will need separate PM Schedules for each point in CIQ.

Using SynergyMMS Work Requests for CIQ Alarms

This aspect of the interface is designed to provide an alternate method to send alarms from CIQ. The first step is to set up the Alarm Alias in CIQ to have an Output Type of **SynergyMMS**. Next set the Output Detail to equal a Task Code in **SynergyMMS**.

Alarm Process Name

CIQ Alarm Process Setup Form

Output Type must be SynergyMMS

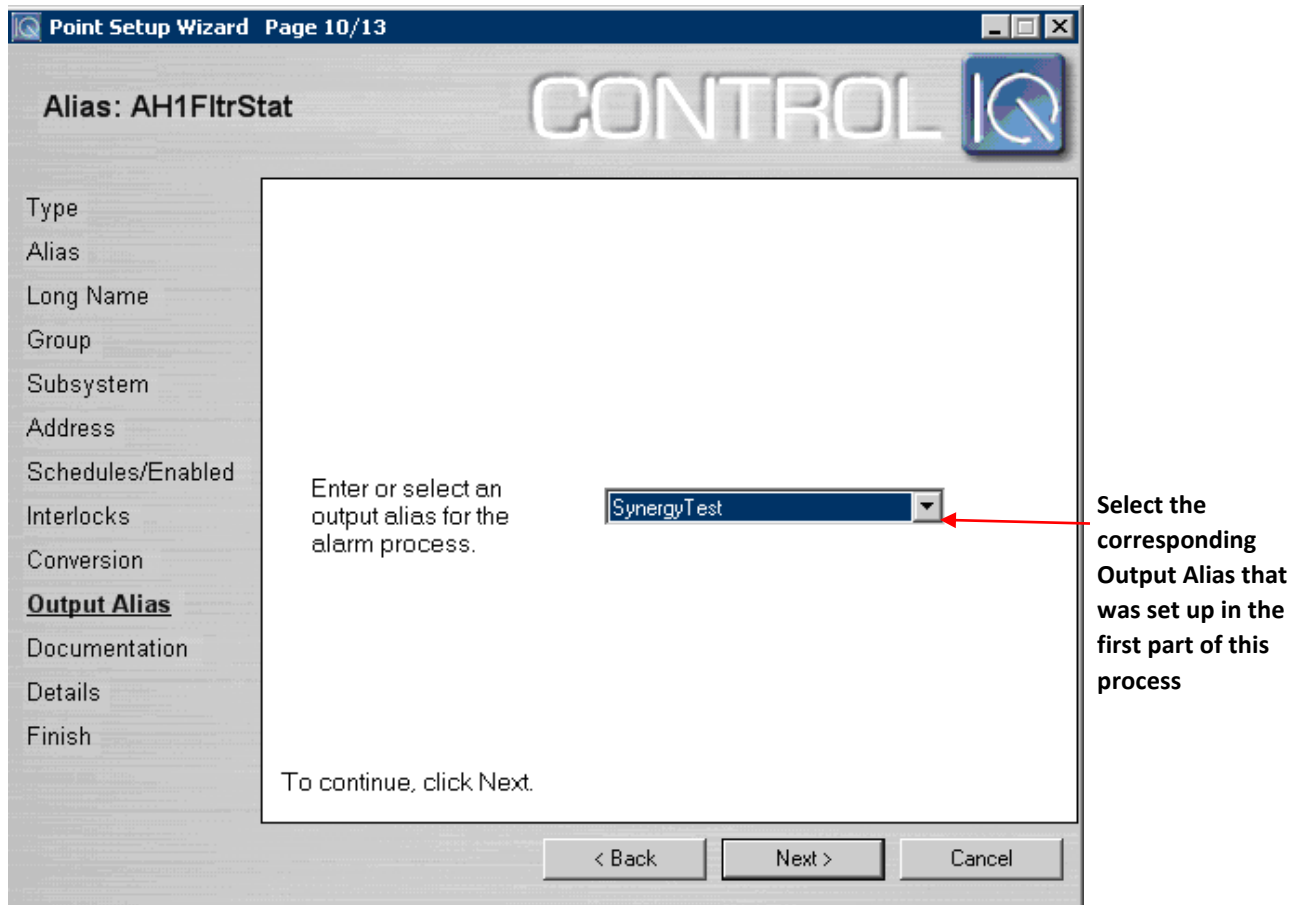
Output Detail must match SynergyMMS Task Code

① **Note:** Since Output Detail is not a drop list linked to **SynergyMMS**, the Task Code text must be an exact match, or the Task Code will be ignored in the resulting Work Request. Output Detail can also be left blank to represent a Task Code of "None."

CIQ Digital Input Details Form

Set Alarm Options to determine when Alarm is triggered

Once the Output Details and Output Type are set in the Alarm Process, it is time to determine when the Alarm will send its notice. A Point's Alarm Option will set which condition triggers the Alarm. This must be done for each Point that is to send an Alarm notification to **SynergyMMS**.



CIQ Point Setup Wizard

The last step is to assign the Output Alias created earlier in this process to each Point that will have a corresponding Alarm. From that point forward, each time the point goes into alarm it will notify **SynergyMMS**, create, and dispatch a Work Request using the pre-selected Task Code.

When an alarm notification is sent by CIQ, **SynergyMMS** attempts to look up the Equipment Name that is in alarm using the CIQ Alias entered on the Equipment Setup form. The Location defined for that equipment is used as the location for the work request generated by the alarm.

① **Note:** If no Equipment is defined for the CIQ Alias, or no Location is defined for the Equipment, the Work Request will be generated with a Location of "None" making it, essentially, invalid. When a user edits that WR they will not be able to exit the WR without first setting the location.

Appendix 1 - SynergyMMS Setup Preferences

Following is a list of SynergyMMS preferences that are not available in SynergyMMS but can be controlled by your respective vendor.

These are normally setup one time in advance of going live with SynergyMMS.

Area Affected	Field	Value	Notes
Setup	propTaskCodesLocked	On / Off	Tasks can not be added or deleted Task code field locked.
Setup	proptcCatLocked	On / Off	Categories are not able to be changed in the Tasks
Setup	propTCDescLocked	On / Off	Task code description field locked.
WorkRequests 3rdPartyInterface	propNotifyVendor	On / Off	If property uses a 3rd party for creating WR that feeds into SMMS
WorkRequets	wr_limit	4200	How many WR can load in Wviews
Mobile	cacpopallowed	On / Off	Covid Mobile app pop ups (Not in Inigma)
Mobile	ccacpopupinterval	5	Time for repeat pop up.
PerfectRoom	dayUseRooms	On / Off	On PMS send of checkout ChOut Servic is applied
PerfectRoom	prCondUpdateOnComp	On / Off	When GRA completes the room it goes Clean, so Occupancy and Clean. EX OC, VC. This is not dependant on the RA rights
PerfectRoom	prDisplayInOutTime	On / Off	Mainly used to turn off for HTNG Micros. However all PR follow.
PerfectRoom	propPRAuditTime	Time UTC	Micros Fias
PerfectRoom	PropUsesLockOffs	On / Off	Relative to Suites if PMS allows

Appendix 2 - SynergyMMS Setup Control Keys

SAi has many users that have used our SynergyMMS over the years in combination with JAWS (Job Access with Speech). Following are a list of Control keys that can be used instead of a mouse click.

Main window

CTRL + T: Open toolbox

Work Requests

CTRL + S: Save changes

CTRL + Insert: Create new record

Esc: Cancel changes

ALT + X: Close window

CTRL + Shift + L: Open filter/customview menu

PM Schedules

CTRL + S: Save changes
CTRL + Insert: Create new record
Esc: Cancel changes

PM on Demand
CTRL + G: Generate PM

PerfectRoom
CTRL + S: Save changes
Esc: Cancel changes

Setup:
CTRL + S: Save changes
CTRL + Insert: Create new record
Esc: Cancel changes

Reports
CTRL + F: Navigate to Favorites tab
CTRL + M: Navigate to Format tab
CTRL + I: Navigate to Filters tab
CTRL + D: Navigate to Details tab
CTRL + W: View report
CTRL + R: Reset
CTRL + S: Save favorite
CTRL + E: Open favorite report schedule window
CTRL + Delete: Delete favorite

Inventory
CTRL + S: Save changes
CTRL + Insert: Create new record
Esc: Cancel changes
ALT + X: Close window

Appendix 3 - SynergyMMS Retention

SAi retention policy details:

Work Requests –

Non equipment WR 3 years from closed date.
Equipment based are retained until equipment is deleted.

PerfectRoom –

ServiceRequests – 3 years
Transactions – 1 year

