BuildingLink Portal

Step-by-Step Procedural Guide

With Interface Screenshots & Concierge Workflows

Luxury Property Management | Concierge Standard of Excellence

Corporate Onboarding • Trainee Edition • CONFIDENTIAL

INTRODUCTION — About This Guide

This procedural guide provides PSS concierge staff with a step-by-step walkthrough of the BuildingLink portal. Each section covers a specific module with exact on-screen steps illustrated with interface screenshots.

BuildingLink operates via two interfaces: the Web Version (browser-based) and ConciergeLink (a Windows desktop application). Both share the same database. This guide covers ConciergeLink as your primary front desk tool.

⚠ **PSS NOTE:** *Screenshots in this guide are accurate interface representations based on BuildingLink's official documentation and portal structure.*

MODULE 1 — Logging Into BuildingLink

1.1 Web Version Login

STEP 1 Open your browser and navigate to your property's BuildingLink URL

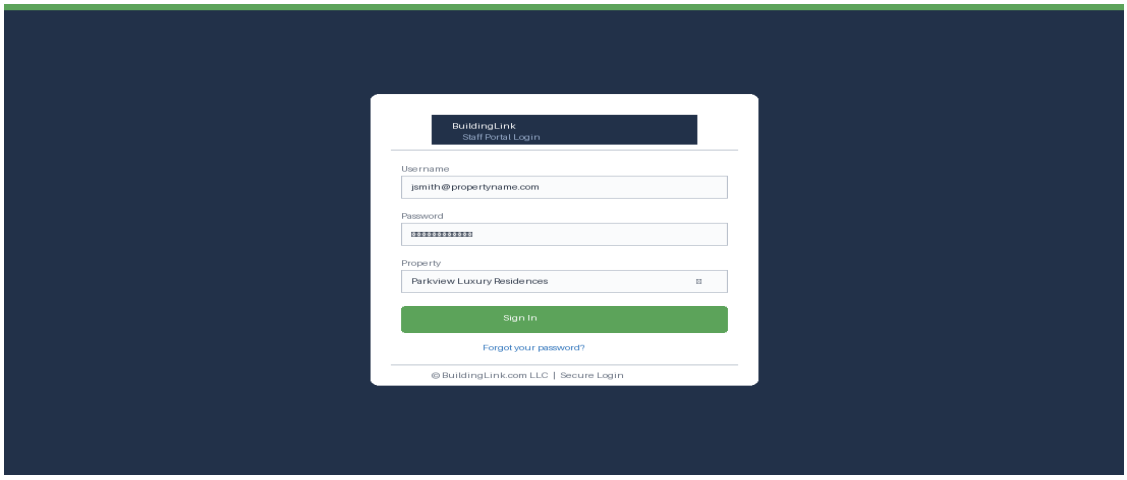
Your supervisor will provide your property's specific BuildingLink URL. Type it directly into the address bar.

STEP 2 Enter your credentials

Type your assigned username and secure password. These credentials are issued by your property manager.

STEP 3 Select your property and click Sign In

If you manage multiple properties, select the correct building from the dropdown before proceeding.



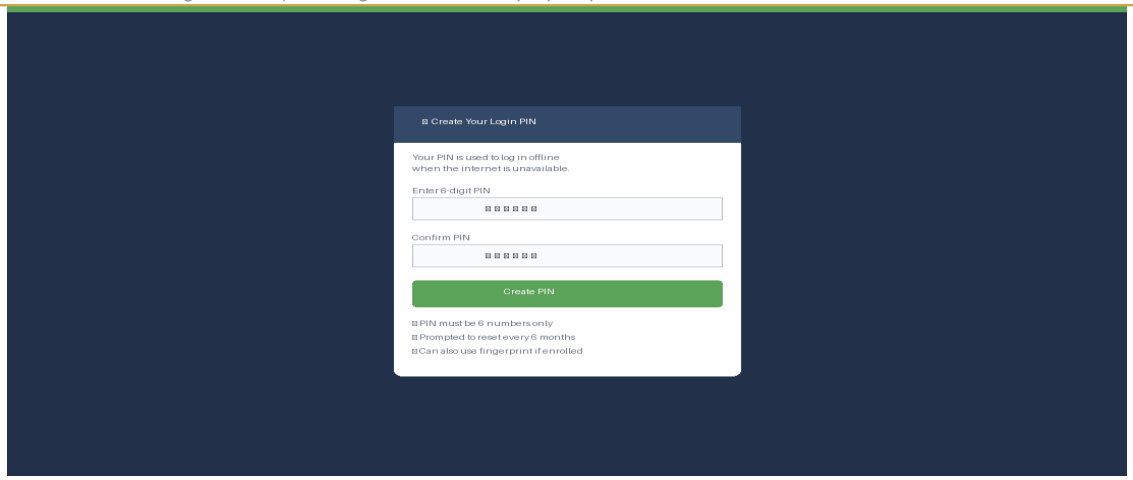
▲ *BuildingLink Login Screen — Enter credentials and select your property*

⚠ **PSS NOTE:** *Never save your password in the browser on a shared workstation. Always log out fully at the end of every shift.*

1.2 ConciergeLink Login & PIN Setup

STEP 1 Launch the ConciergeLink application and enter credentials

Double-click the ConciergeLink icon on the desktop. On first login, enter your standard username and password. You will be prompted to create a 6-digit PIN.



▲ *ConciergeLink PIN Setup — Create a 6-digit numeric PIN for offline access*

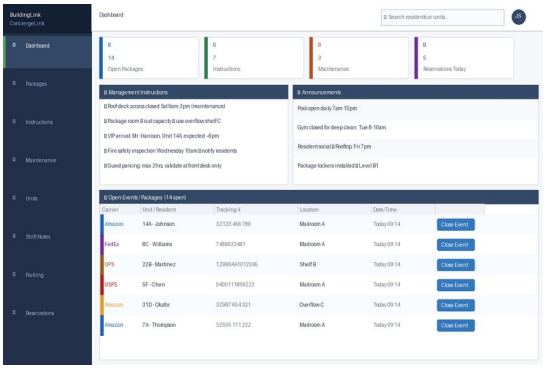
STEP 2 Subsequent logins

If online: use username and password, or your PIN. If offline: use your PIN or enrolled fingerprint. ConciergeLink syncs data with BuildingLink automatically when connectivity restores.

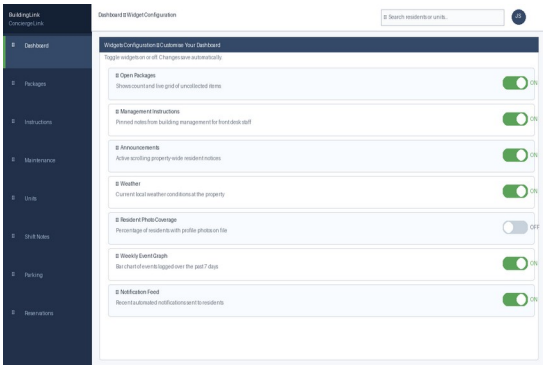
MODULE 2 — The ConciergeLink Dashboard

2.1 Dashboard Overview

The Dashboard is your home screen. It provides an instant overview of the property's current status and all items requiring your attention.



▲ *ConciergeLink Dashboard — Main view with widgets, packages, and instructions*



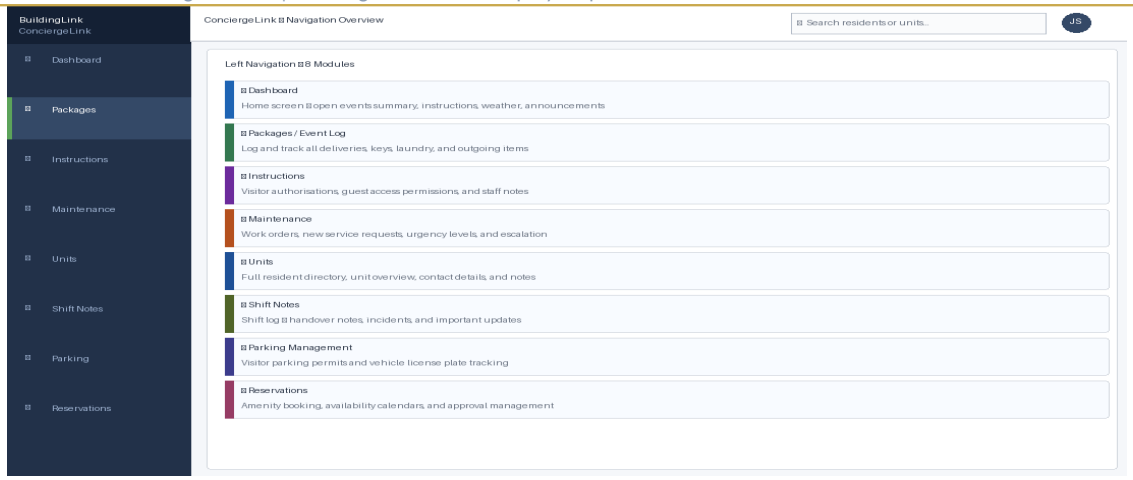
▲ *Widget Configuration — Toggle panels on or off*

2.2 Dashboard Widgets

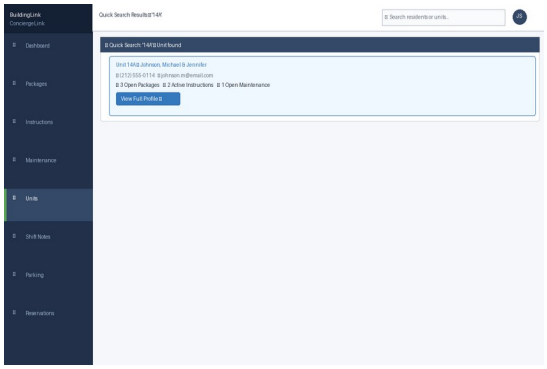
The Dashboard contains: Open Packages, Management Instructions, Announcements, Weather, Resident Photo Coverage, and the Weekly Event Graph. Check the Dashboard at the start of every shift.

⚠ **PSS NOTE:** *Read all management instructions at shift start before engaging with residents or handling deliveries.*

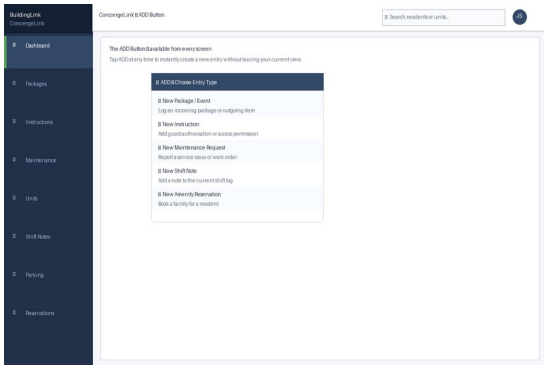
MODULE 3 — Navigation & The ADD Button



▲ *Left Navigation — All 8 ConciergeLink modules and their functions*



▲ *Quick Search — Find any resident or unit instantly*



▲ *ADD Button — Create any entry type from any screen*

The Quick Search bar at the top of every screen instantly locates a resident or unit. The ADD button (exclusive to ConciergeLink) allows you to create a new entry from any screen without navigating away.

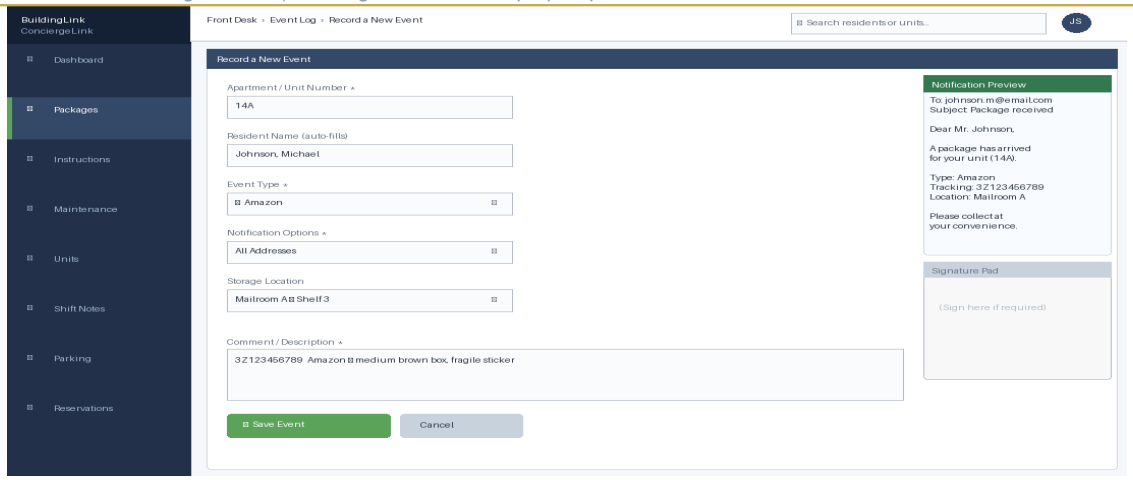
MODULE 4 — Package Management (Event Log)

The Event Log tracks all incoming and outgoing physical items. Every package must be logged — no exceptions.

4.1 Logging a New Package

STEP 1 Navigate to Packages tab and click 'Record a New Event'

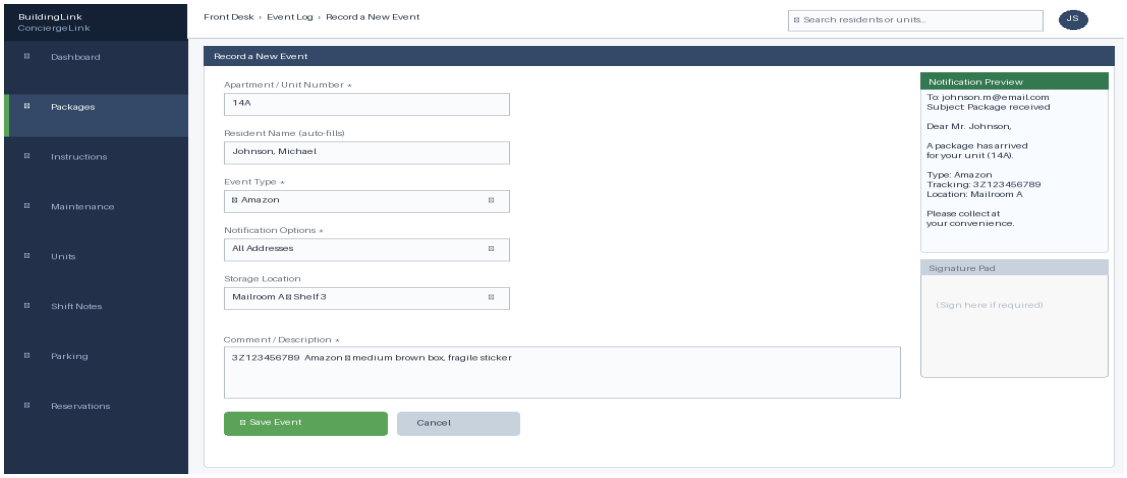
Click the green Record a New Event button at the top of the Event Log screen.



▲ *Front Desk — Click 'Record a New Event' (green button) to begin logging*

STEP 2 Enter unit number and select Event Type

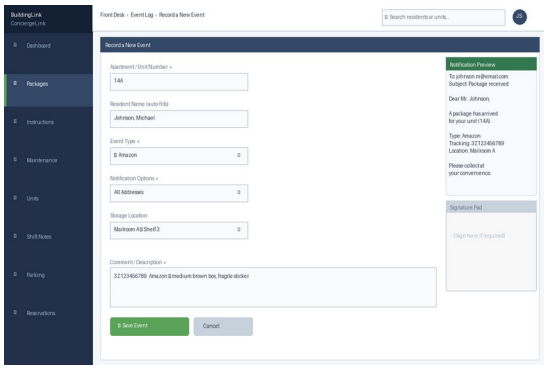
Type the resident's unit number or name. Select the carrier from the Event Type dropdown (Amazon, FedEx, UPS, USPS, DHL, etc.).



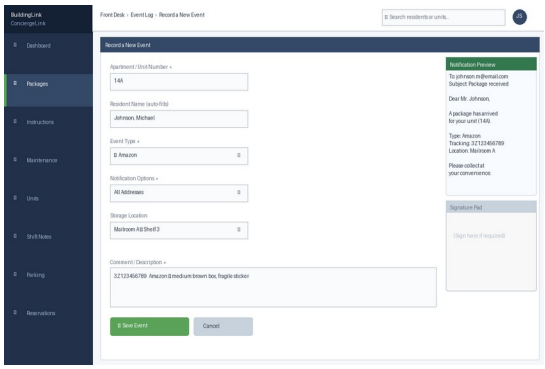
▲ *Event Form — Enter unit number and select the carrier as Event Type*

STEP 3 Set Notification Options and enter a descriptive comment

Verify the correct residents are selected for notification. In the Comment field, scan the tracking barcode or type the carrier and description.



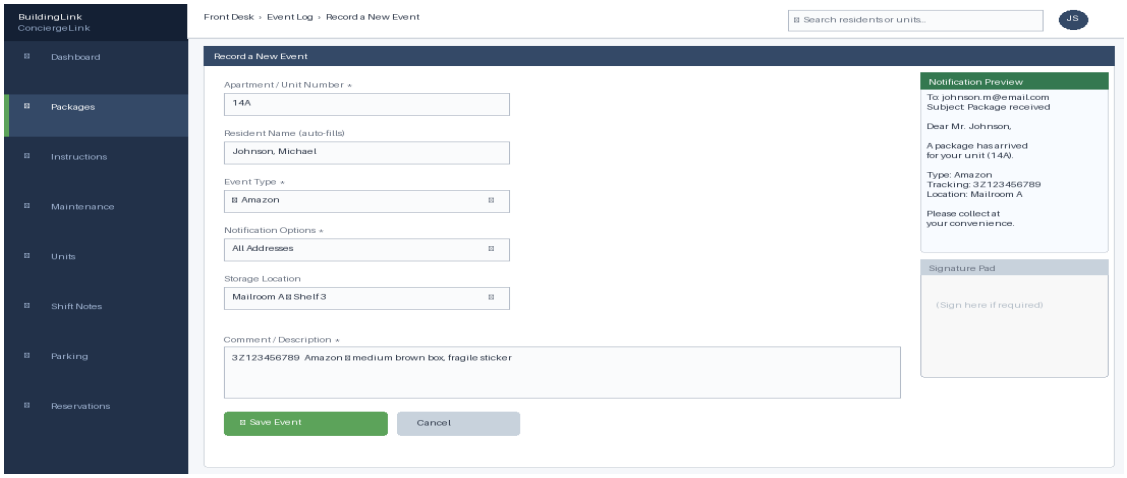
▲ *Notification Options — Verify recipients before saving*



▲ *Comment Field — Scan barcode or type description and carrier*

STEP 4 Click Save Event

Click the green Save Event button. The package is logged, the resident receives automatic notification, and the item appears on the Open Event Grid.

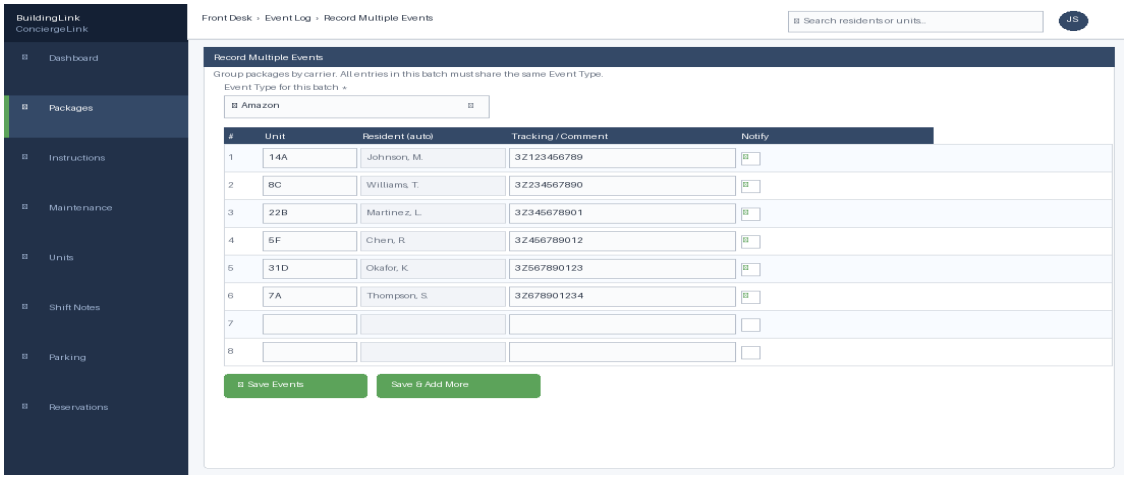


▲ *Save Event — Package logged and resident notification sent automatically*

⚠ **PSS NOTE:** *In units with second-level occupants (renters/tenants), BuildingLink only offers the second-level occupant for notification. Contact first-level owners manually if required.*

4.2 Recording Multiple Events (Bulk Deliveries)

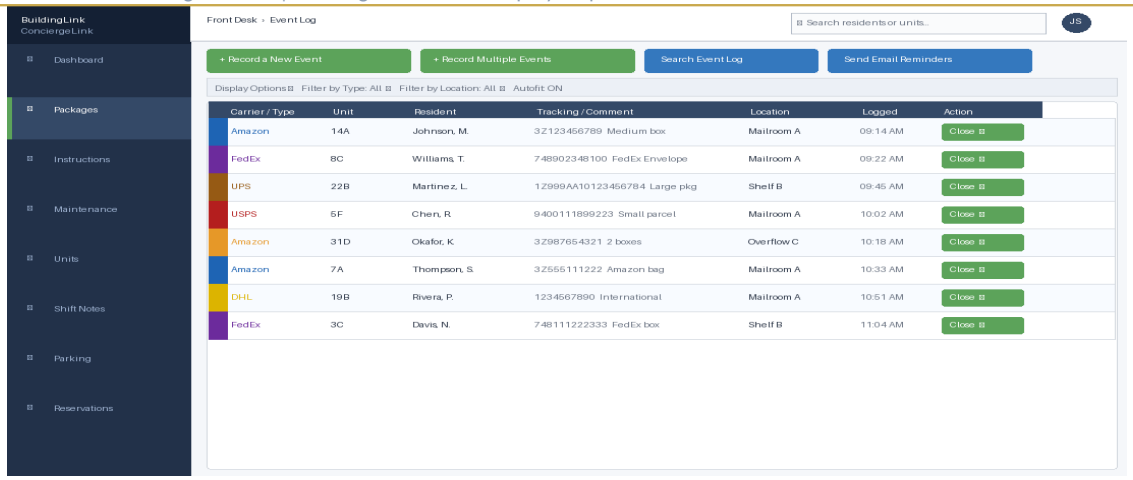
When a carrier delivers many packages simultaneously, use Record Multiple Events to process them efficiently.



▲ *Record Multiple Events — Group by carrier, enter unit and tracking per row*

Select the carrier for the batch. All packages in one batch must share the same carrier. Fill unit and tracking for each row. Click Save Events when complete.

4.3 Viewing the Open Event Grid



▲ *Open Event Grid — All held items, colour-coded by carrier type*

Items are colour-coded by carrier. Use Autofit Mode for optimal display. Filter by event type or location using the dropdown menus at the top.

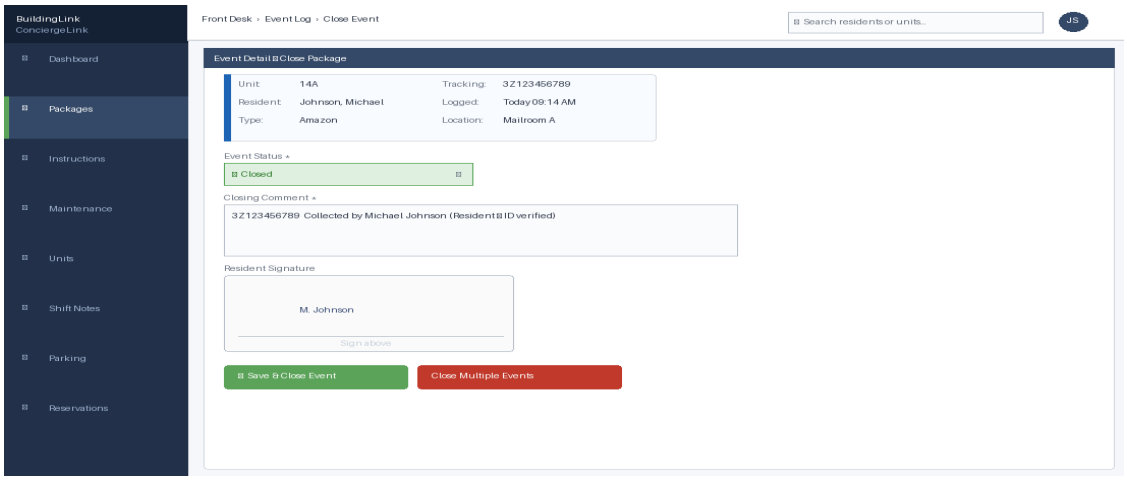
4.4 Closing an Event (Package Pickup)

STEP 1 Verify resident identity and locate event on the grid

Ask for the resident's name and unit number. For high-value items or unfamiliar faces, request photo ID.

STEP 2 Change status to Closed, enter closing comment, and capture signature

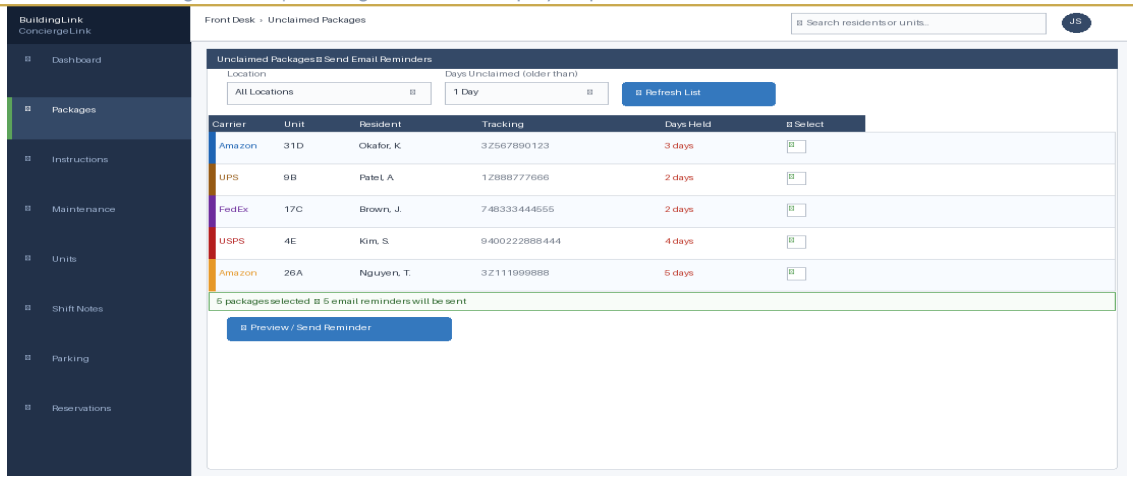
Click the event, set status to Closed. Record who collected the package — rescan the tracking barcode if available, then add the recipient's name. Capture signature if required.



▲ *Closing an Event — Status set to Closed, comment entered, signature captured*

> ⚠ **PSS NOTE:** *The closing comment is your chain-of-custody record. Always include the tracking number and the name of the person collecting the item.*

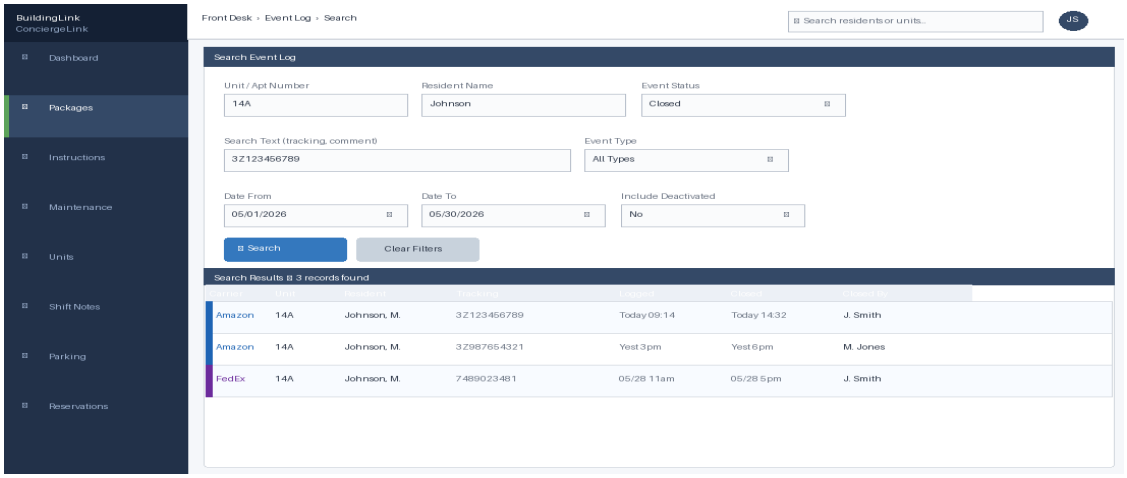
4.5 Sending Unclaimed Package Reminders



▲ *Unclaimed Packages — Filter by days held, select, and send email reminders*

Click Send Email Reminders from the Event Log screen. Filter by location and days unclaimed. Click Preview/Send Reminder to dispatch notifications to residents with outstanding packages.

4.6 Searching the Event Log

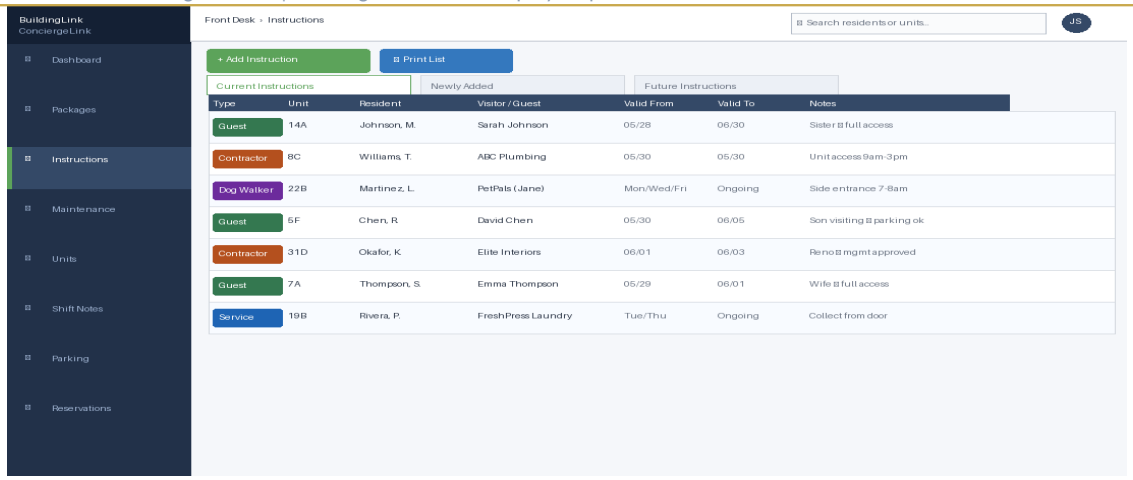


▲ *Event Log Search — Search by unit, tracking number, carrier, or date range*

Use Search Event Log to trace any package in the permanent record. Search by unit, tracking number, carrier, or date range. Set Event Status to Closed for previously collected items.

> ⚠ **PSS NOTE:** *When a resident reports a missing package, search the Event Log immediately. The audit trail — who logged it, where it was stored, who collected it — is your evidence.*

MODULE 5 — Instructions (Visitor Authorisations)



▲ *Instructions Tab — Colour-coded guest, contractor, and service authorisations*

STEP 1 View current instructions

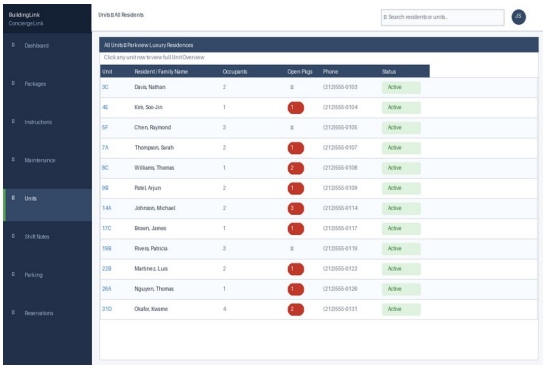
Click the Instructions tab. The Current Instructions grid shows all active visitor permissions. Use Newly Added and Future Instructions tabs for recent or upcoming entries.

STEP 2 Add a new instruction

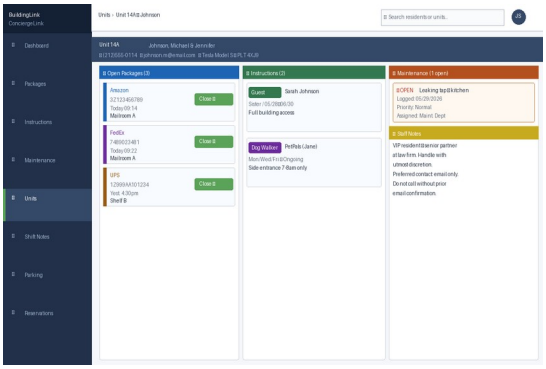
Click Add Instruction. Fill in: unit number, visitor name, instruction type (Guest, Contractor, Dog Walker, Service), date range, and specific access notes. Save.

> ⚠ **PSS NOTE:** *Never grant building access to an unverified visitor without a current, active instruction on record or direct real-time authorisation from the resident.*

MODULE 6 — Units (Resident Directory & Overview)



▲ *Units Tab — Full property unit list with open package badges*

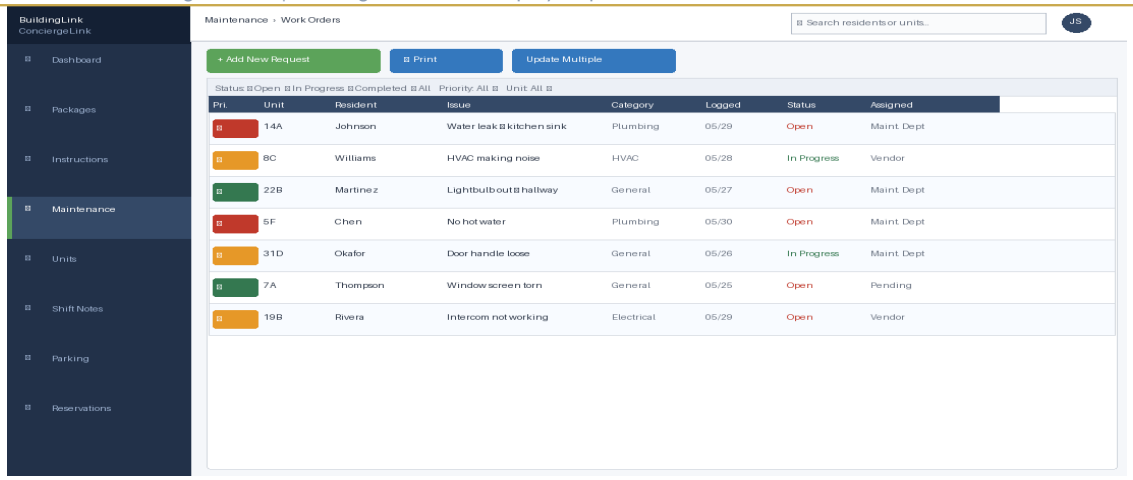


▲ *Unit Overview — Packages, instructions, maintenance, and staff notes*

Click any unit to open the Unit Overview — the complete profile for that resident. It contains contact details, open packages, active instructions, vehicle information, maintenance history, and confidential staff notes.

> ⚠ **PSS NOTE:** *Resident data in the Unit Overview is strictly confidential. Access it only for official operational purposes. Never share any resident information with third parties.*

MODULE 7 — Maintenance Requests



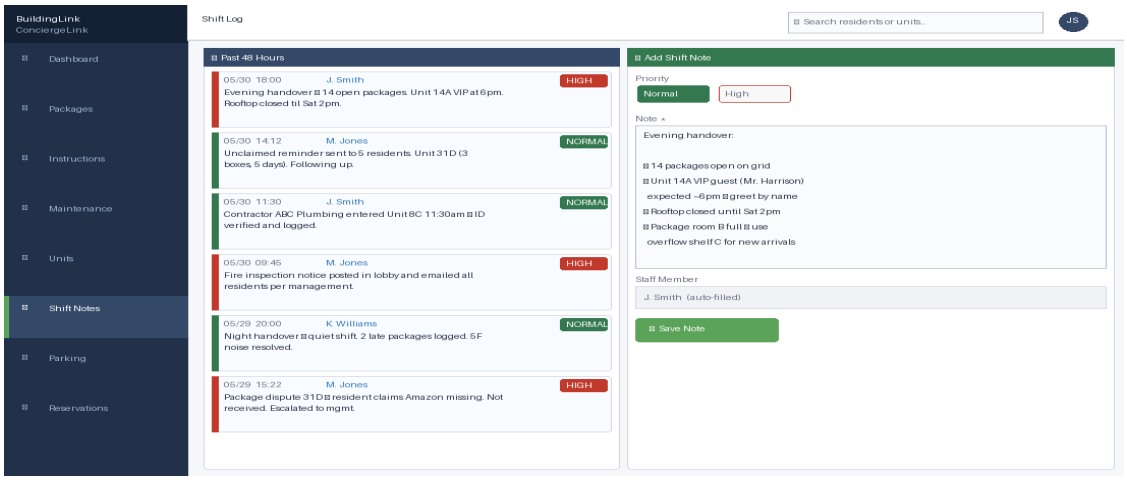
▲ *Maintenance Tab — Priority-coded work orders; Add New Request button at top*

STEP 1 Log a new maintenance request

Click Add a New Request. Enter unit number, issue category, detailed description, and urgency level. Emergency issues (water, heating, safety) — log as URGENT and contact your supervisor by phone immediately.

> ⚠ **PSS NOTE:** *Never dismiss or delay logging a maintenance concern. Every unlogged issue creates liability. If a resident reports it, it gets logged.*

MODULE 8 — Shift Log



▲ *Shift Log — Past 48 hours on left, add new notes on right*

STEP 1 Review notes at shift start

Read all shift notes from the past 24 hours before taking any action. Note outstanding issues, special resident instructions, and follow-up items.

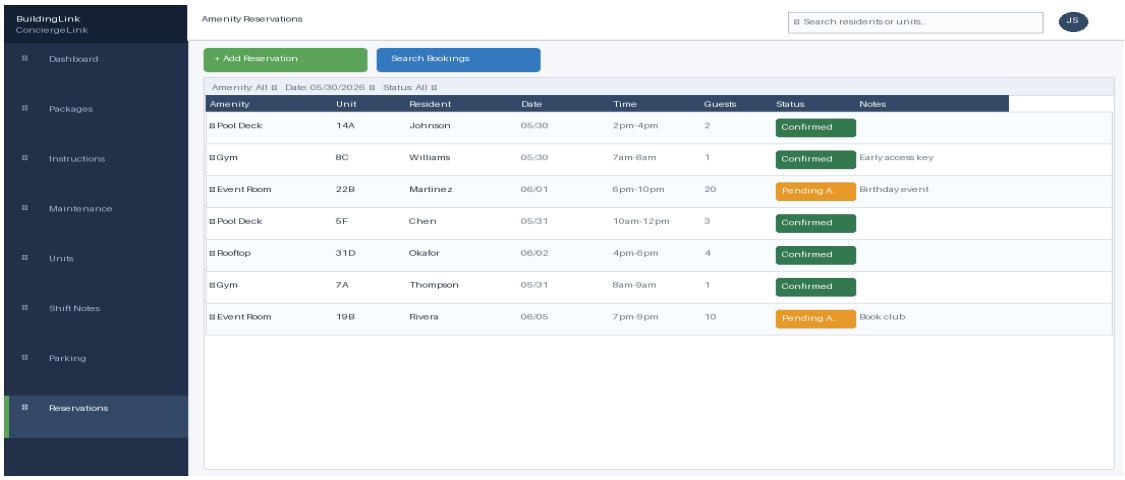
STEP 2 Log throughout your shift and add end-of-shift summary

Log anything significant: incidents, complaints, unusual events, package disputes, maintenance concerns. Before your shift ends, add a clear summary of outstanding items for the incoming team.

> ⚠ **PSS NOTE:** *The Shift Log is reviewed by management. Write every entry as if your supervisor is reading it —*

professional, factual, and complete.

MODULE 9 — Amenity Reservations

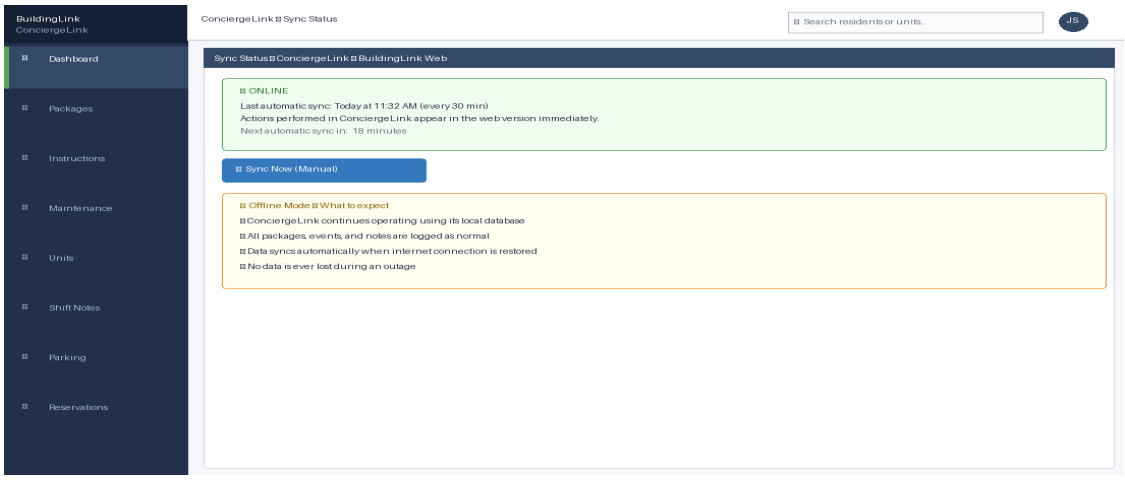


▲ *Amenity Reservations — Confirmed (green) and pending approval (amber) bookings*

STEP 1 Add a reservation

Click Add Reservation. Select the amenity, date, time slot, and resident unit. Confirm availability. Verify the resident has no outstanding restrictions. For approval-required amenities, advise the resident the booking is pending — do not confirm until BuildingLink shows Approved.

MODULE 10 — Syncing ConciergeLink



▲ *Sync Status — Online with automatic 30-minute sync; manual Sync Now button*

ConciergeLink syncs automatically every 30 minutes. During an internet outage, continue logging all events normally — data syncs automatically on reconnection. Click Sync Now to manually force a sync when you know web-version changes have been made.

⚠ **PSS NOTE:** *No data is ever lost during an internet outage. ConciergeLink stores everything locally and syncs on*

reconnection.

QUICK REFERENCE — Common Tasks at a Glance

TASK	WHERE IN BUILDINGLINK
Log a new package	Event Log tab → Record a New Event (green button)
Log multiple packages	Event Log tab → Record Multiple Events (green button)
Mark package as collected	Event Log → click event → Status: Closed → Save
Send unclaimed reminders	Event Log tab → Send Email Reminders (blue button)
Search for a past package	Event Log tab → Search Event Log (blue button)
Look up a resident	Quick Search bar (top of any screen) OR Units tab
Check visitor authorisation	Instructions tab → search by unit or visitor name
Add guest permission	Instructions tab → Add Instruction
Log a maintenance issue	Maintenance tab → Add a New Request
Book an amenity	Reservations tab → Add Reservation
Add a shift note	Shift Notes tab → type in right panel → Save
Sync with web version	Sync button at top of ConciergeLink

FINAL NOTE — The PSS Standard

BuildingLink is your operational partner. Every entry you make is a permanent record of the service standard you delivered. Accuracy, timeliness, and professionalism in every log entry is what separates a PSS concierge from an ordinary front desk operative.

Professional • Discreet • Excellence-Driven