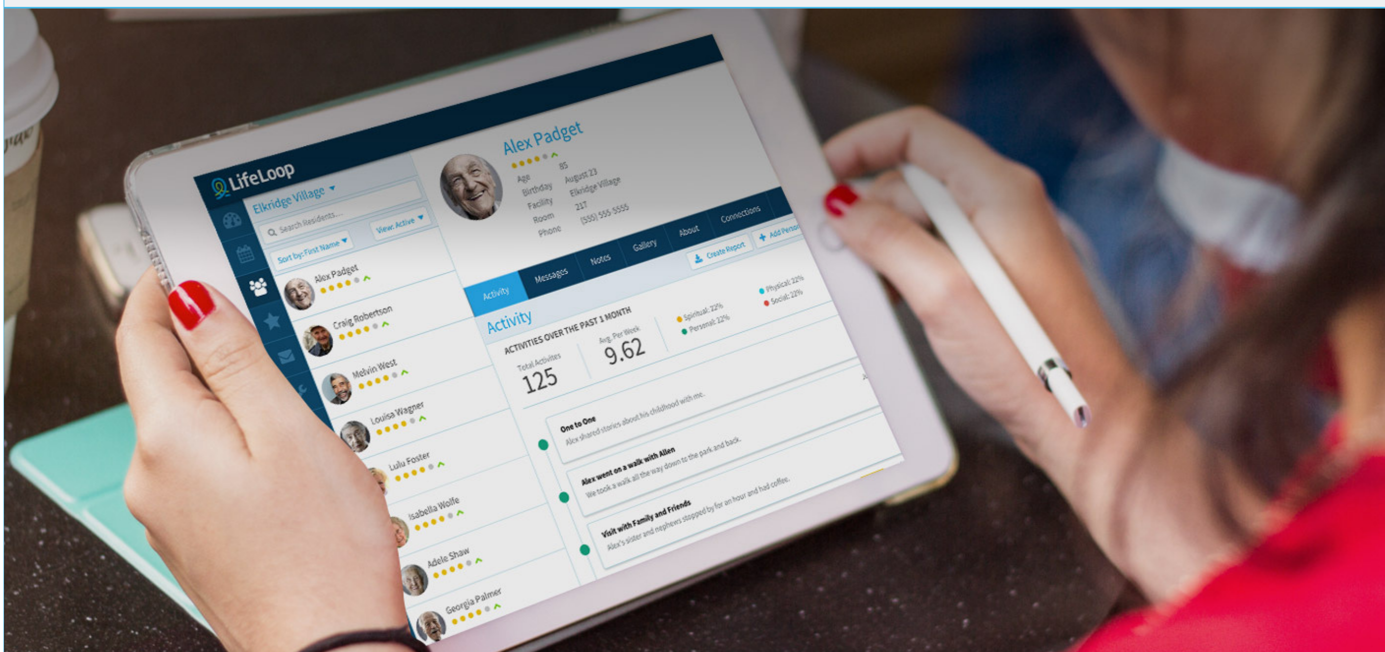
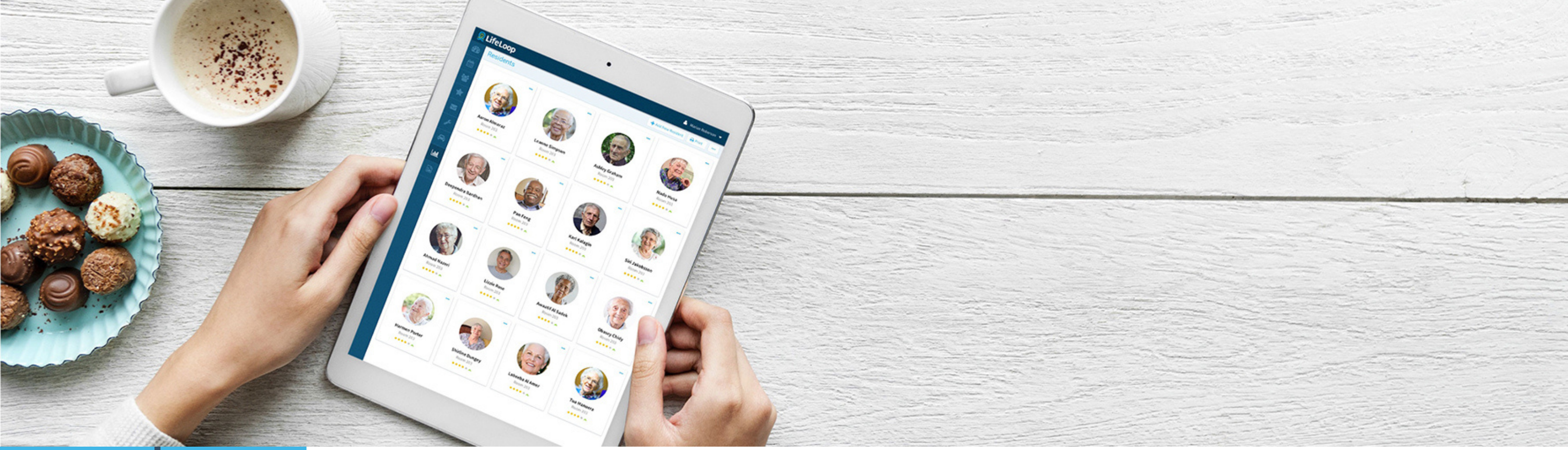
LifeLoop



LIFELOOP TRAININGS

WORK REQUESTS

How to create new work requests and tasks.



LIFELOOP TRAININGS

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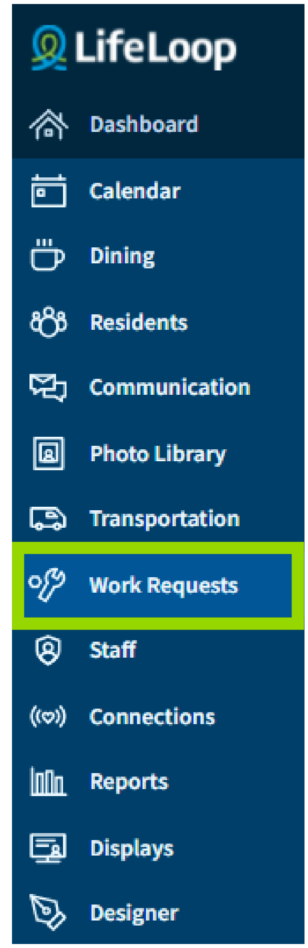
LIFELOOP TRAININGS

WORK REQUESTS

CREATING A NEW WORK REQUEST



STEP 1

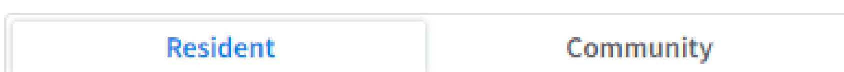
Go to Work Requests in the feature menu on the left-hand side.

STEP 2

Click on **+ New Request** on the top right-hand corner. This will open the Create Request Form.

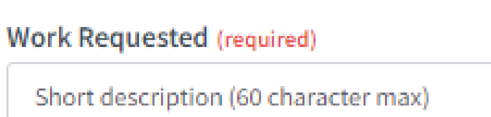
STEP 3

Select if this is a Work Request for the Community or for a Resident.



STEP 4

Add a Work Requested Short Description such as "Light Bulb Needs Changed".



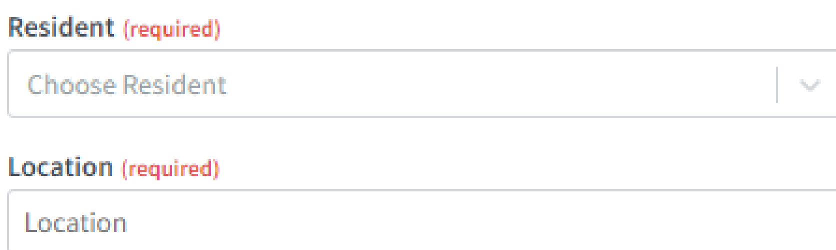
LIFELOOP TRAININGS

WORK REQUESTS

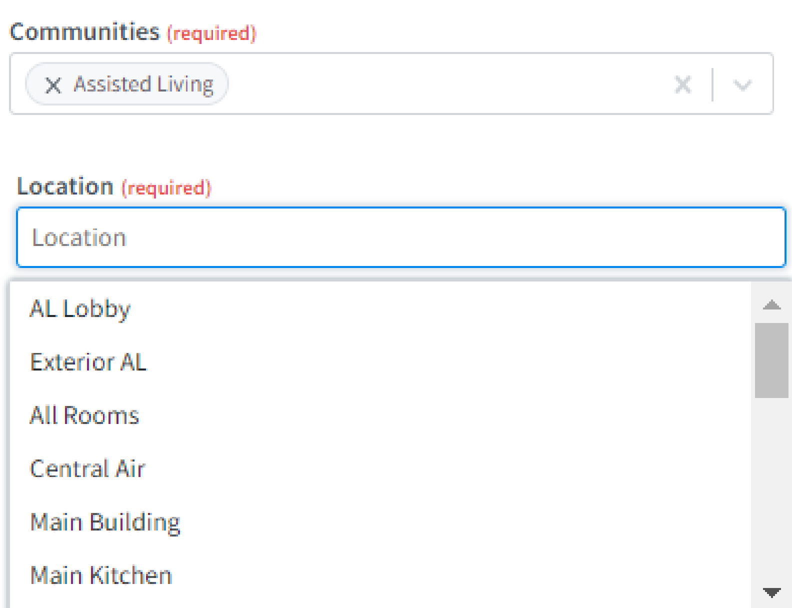
CREATING A NEW WORK REQUEST

STEP 5

For a Resident Work Request, choose a resident from the resident dropdown list. The resident's unit number will auto-populate in the location field.



For a Community Work Request, choose which community the request is for in the communities field. Next, select the location either from the dropdown, which are the locations previously inputted into manage settings, or type one in if it is not listed.



WORK REQUESTS

CREATING A NEW WORK REQUEST

STEP 6

Assign a specific Team to the work request. Click on **Team** to view your Teams and select the relevant one. These Team options are for the account level and were created upon setup. If you would like to edit reach out to your LifeLoop Relationship Specialist or support@ourlifeloop.com

Team (required)

Team/Department

Maintenance

Housekeeping

IT

STEP 7

Assign a type to the work request. Click on **Request Type** to select from the dropdown, which contains types previously inputted into manage settings.

Type

Request Type

Billable

Technology Requests

Inspection

Groundskeeping

Vehicle Updates

Electrical

Plumbing

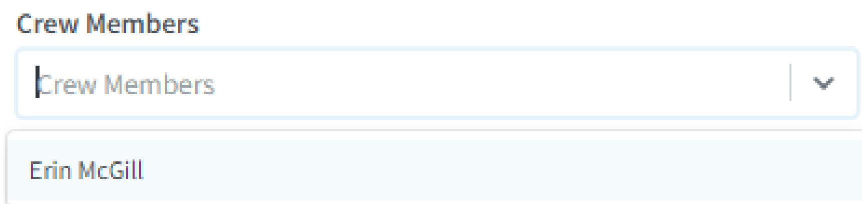
WORK REQUESTS

CREATING A NEW WORK REQUEST

LIFELOOP TRAININGS

STEP 8

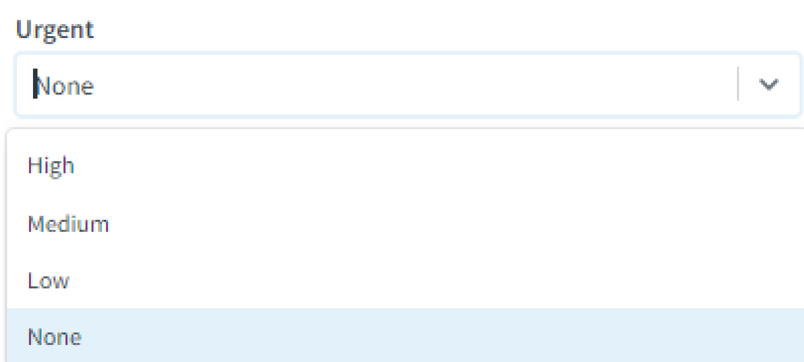
Assign a crew member to this request. Click on **Crew Members** and all staff that are assigned to that Work Request Team will show on this list.



Note: *If you do not see a staff member in your Crew Member's dropdown, they are not assigned to this specific Team. Go to their staff profile and add them to the correct Work Request Team.*

STEP 9

Choose a level of urgency to this request. Click on **None** to open the dropdown and select a level.



Note: *Staff will need the "Manage Work Requests" permission in order to add Crew Members, Urgency, or set a schedule date to a request.*

WORK REQUESTS

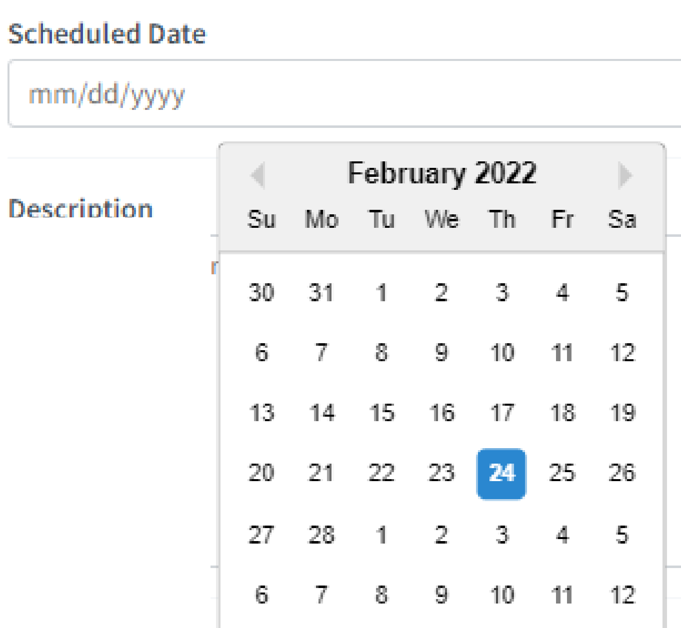
CREATING A NEW WORK REQUEST

STEP 10

If this request is preventative or a recurring request, click on **Setup Recurring**. To learn more about Recurring Requests, refer to Section 6: Recurring Requests.

STEP 11

If this request needs to be completed on a specific date, click **Scheduled Date**. To learn more about Scheduled Requests, refer to Section 7: Scheduled Requests.

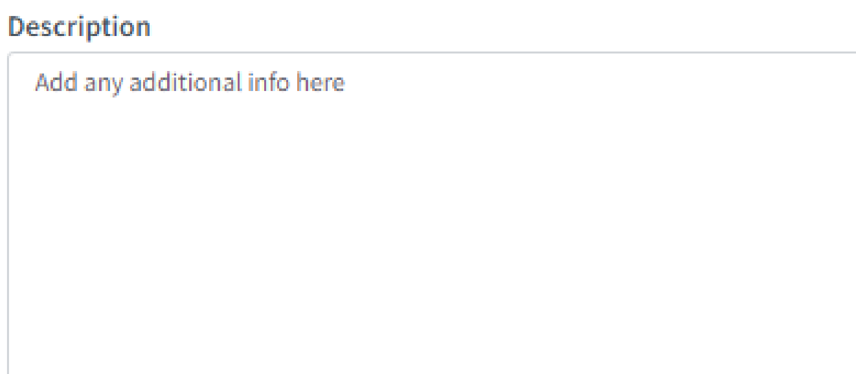


WORK REQUESTS

CREATING A NEW WORK REQUEST

STEP 12

Add a Description to the description box with any additional details regarding this request.



STEP 13

Click **Add Attachments** to add any PDFs or images to your request.

STEP 14

Once you have completed the new request form, click **Create Request** on the bottom right-hand side.

WORK REQUESTS

TASKS

WHAT ARE TASKS USED FOR?

Tasks can be added to any work request. Tasks are items that are required to be done for the request as a whole to be considered complete.

CAN I COMPLETE A WORK REQUEST WITH TASKS THAT HAVE NOT BEEN COMPLETED?

No. You must complete all tasks on a work request in order to complete it.

CAN I EDIT AN ALREADY CREATED TASK?

Yes. Next to a task, click on the three dot icon ••• and select Edit.

HOW DO TASKS ON A RECURRING REQUEST WORK?

The tasks on a recurring request will stay with the recurrence and will refresh each time an occurrence in the series is due and moves to the To-Do list.

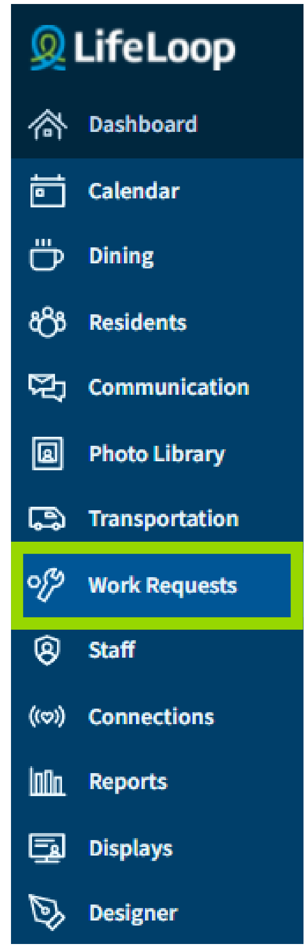
WORK REQUESTS

TASKS

ADDING A TASK TO A REQUEST

STEP 1

Go to Work Requests in the feature menu on the left-hand side.

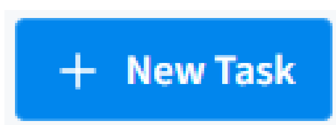


STEP 2

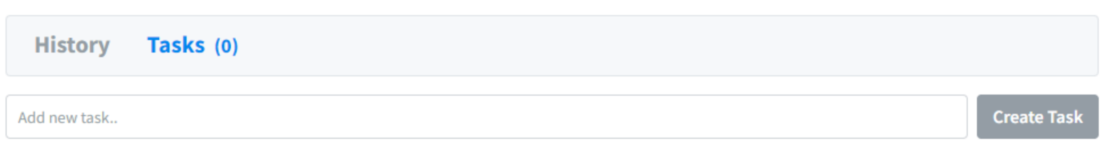
Open the request you would like to assign a task to by clicking on it.

STEP 3

On the top right-hand side, click on **+New Task.**



This will open a free-form text box under Tasks for your input. Type in the task you would like to add.



STEP 4

Click **Create Task.**

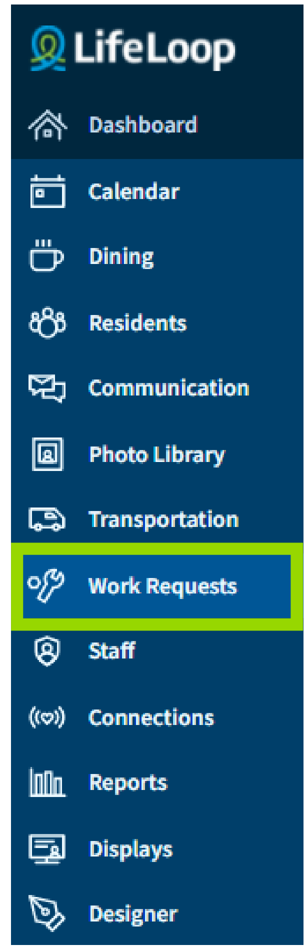
WORK REQUESTS

TASKS

MARKING A TASK COMPLETED

STEP 1

Go to Work Requests in the feature tool bar on the left-hand side.

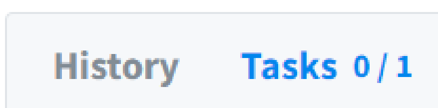


STEP 2

Open the request details of the request you would like to view by clicking on the work request.

STEP 3

Click on **Tasks** on the bottom of the request details.



Note: *The number next to Tasks shows how many tasks have been completed out of the total amount of tasks on the request.*

STEP 4

Once you have completed a task click on the check mark ✓ next to it.

WORK REQUESTS

CONTINUED LEARNING

ATTEND A UNIVERSITY COURSE

Don't forget about our complimentary LifeLoop University available to you and your team. Courses are provided weekly and cover all LifeLoop features. Emails with the topics and schedules are sent out monthly for you to register to attend.

VISIT THE LEARNING COMMUNITY

Access LifeLoop marketing collateral and training resources at your convenience.
Find the Learning Community by clicking the "?" on the top right-hand side of your screen or going to https://ourlifeloop.com/training/staff.

FURTHER QUESTIONS?

Reach out to Support@OurLifeLoop.com or your Customer Relationship Specialist.