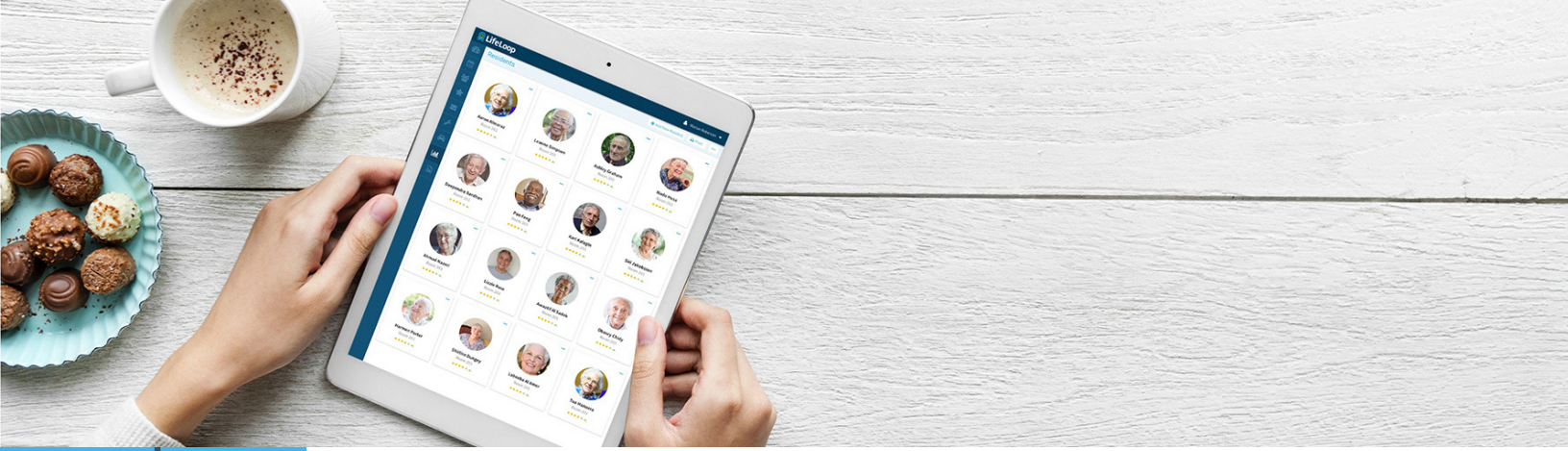


WORK REQUESTS

How to manage backlog and closed work requests.



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WORK REQUESTS

BACKLOG REQUESTS

? WHAT ARE BACKLOG REQUESTS?

Backlog requests include any new requests that are not recurring and have not been assigned to the To-Do list yet as well as any scheduled requests prior to their due date.

? CAN I PRINT MY BACKLOG LIST?

You can print the list of work requests on the backlog list by clicking on Print/Export on the top right-hand side and selecting work requests.

? WHY DO SOME BACKLOG REQUESTS HAVE A GREYED-OUT ARROW NEXT TO THEM?

This means they are scheduled requests and will automatically be added to the To-Do List on their scheduled date. To move a scheduled request to the To-do list prior to its scheduled date, check the box next to the request, click selected on the top and click Add to To-Do.

WORK REQUESTS

BACKLOG REQUESTS

MOVING A REQUEST FROM THE BACKLOG TO THE TO-DO LIST

STEP 1

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



Work Requests

STEP 2

Select **Backlog** located in the light blue menu on the left-hand side.

Work Requests

To-Do List

Backlog

Recurring

Calendar

Closed

STEP 3

If you would like to only move one request at a time to the To-Do List, click the **blue arrow** next to the request that you would like to move.



Maintenance - #MR000661



Need help moving my couch

Joey Carney

3 months ago



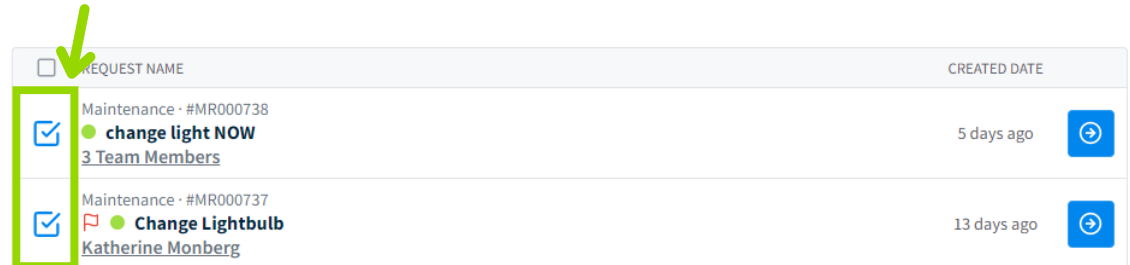
WORK REQUESTS

BACKLOG REQUESTS

MOVING A REQUEST FROM THE BACKLOG TO THE TO-DO LIST (CONT.)

STEP 4

To move multiple requests from the Backlog to the To-Do list at the same time, click on the **check boxes** on the left-hand side of each request you would like to move.



A screenshot of a web application showing a table of work requests. The table has two columns: 'REQUEST NAME' and 'CREATED DATE'. The first row is 'Maintenance · #MR000738' with a green dot and the text 'change light NOW' and '3 Team Members', created '5 days ago'. The second row is 'Maintenance · #MR000737' with a red dot and the text 'Change Lightbulb' and 'Katherine Monberg', created '13 days ago'. Both rows have a checked checkbox in the first column. A green arrow points to the first checkbox, and a green box highlights the checkboxes of both rows.

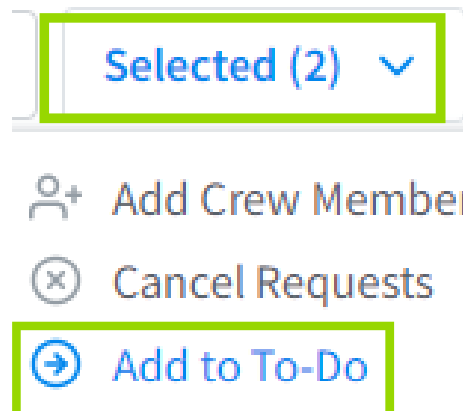
<input type="checkbox"/>	REQUEST NAME	CREATED DATE
<input checked="" type="checkbox"/>	Maintenance · #MR000738 ● change light NOW 3 Team Members	5 days ago
<input checked="" type="checkbox"/>	Maintenance · #MR000737 ● Change Lightbulb Katherine Monberg	13 days ago

STEP 5

Click on **Selected** that now appears to the right of the search bar.

STEP 6

Click on **Add to To-Do List**. This will now add all selected requests to the To-Do List.



A screenshot of the bottom of the work requests interface. It shows a search bar with 'Selected (2)' and a dropdown arrow. Below the search bar are three buttons: 'Add Crew Member' with a person icon, 'Cancel Requests' with a cancel icon, and 'Add to To-Do' with a right arrow icon. The 'Add to To-Do' button is highlighted with a green box.

Selected (2) ▾

Add Crew Member

Cancel Requests

Add to To-Do

WORK REQUESTS

CLOSED REQUESTS

? WHAT REQUESTS SHOW IN MY CLOSED TAB?

The Closed tab shows any requests that have been Completed or Cancelled.

? CAN I SEARCH FOR A SPECIFIC CLOSED REQUEST?

Absolutely! Use the search bar on the top and type in any specific request you would like to find.

? CAN I REOPEN A CLOSED REQUEST?

Yes, as long as you have the staff permissions to do so! Open the details of a specific request and change the status to Open or Pending.

? CAN I PRINT CLOSED REQUESTS?

Yes! Selecting Print/Export on the top right-hand side will give you the option to select closed requests. You will now be able to select a time period for the closed requests you would like to print.

Export Requests ×

Select the request type you would like to export. The work request filters will be applied to the exported list.

Type

Work Requests	To-Do List	Closed Requests
---------------	------------	------------------------

The number of exported closed requests is limited to 1000 records. You may need to select smaller segments to get every request.

Duration

Past Month	Past Year	Custom Range
-------------------	-----------	--------------

Cancel Export Print

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.