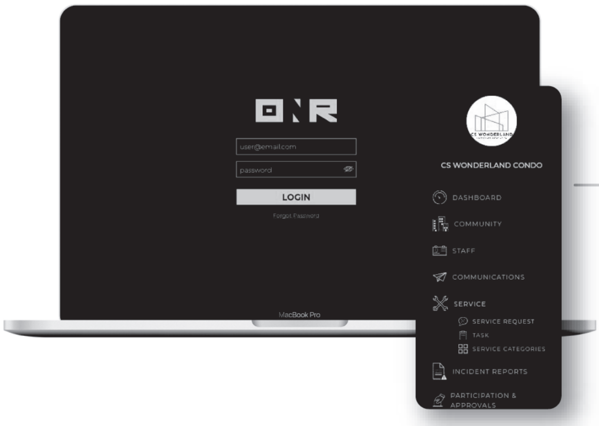
GUIDE FOR SERVICE REQUESTS MANAGEMENT



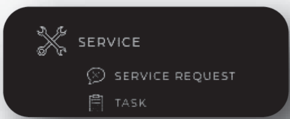
1 Main Menu Options

Once logged in to Power Admin, follow these steps:

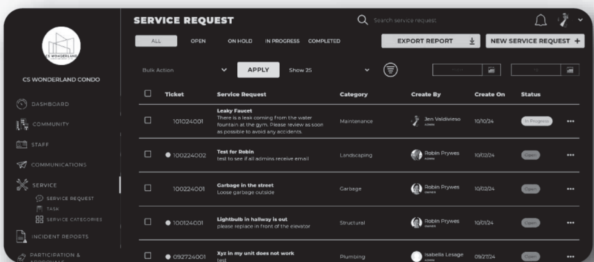
On the left menu, locate the Service Request Module. Hover over it to see the following options:

- Service Request
- Tasks
- Service Categories

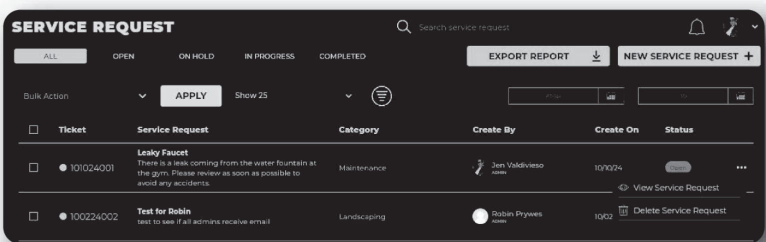
A Managing a Service Request



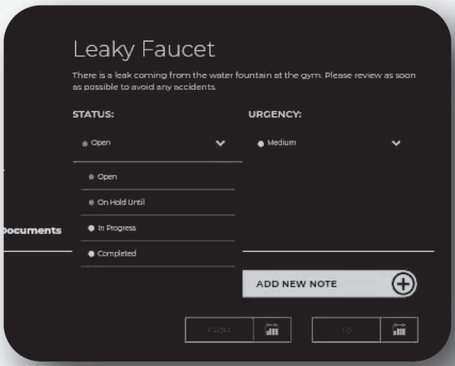
1. **Access the Service Request Module:** Click on the **Service Request icon.**



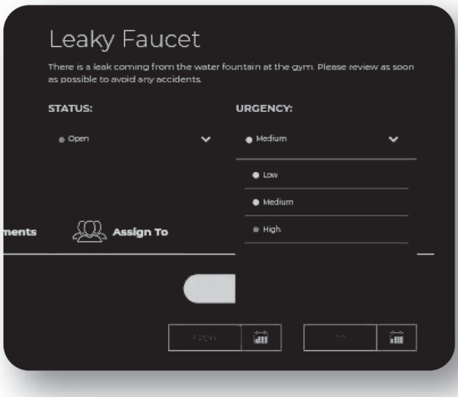
2. **View Service Requests:** All service requests are displayed. You can filter them by **Open, On Hold, In Progress, or Completed** using the tabs at the top left.



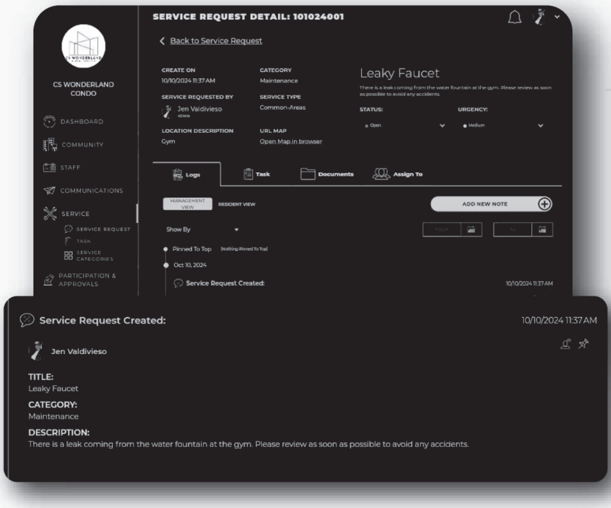
3. **Taking Action on a Service Request:** Click on the three dots on the far-right side of a request and select **View Service Request** for detailed information.



4 **Update the Service Request Status:** Use the top-right section to change the request status to **Open, On Hold, In Progress, or Completed.** These changes trigger notifications to both the resident and management team.



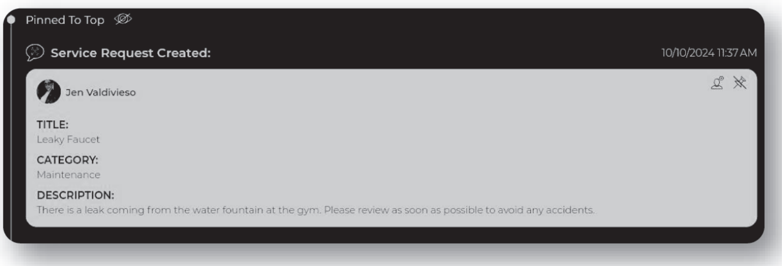
5 **Set Urgency:** Set the urgency level of the service request to **Low, Medium, or High.** This urgency level is only visible for admins.



B Logs & Task Updates

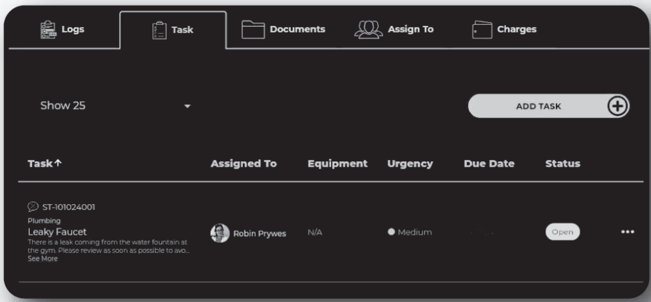
1 **View Logs:**

- The Logs tab display notes and task updates on the service request.
- To allow visibility for your resident into particular logs, click on the **Person icon** at the top right of each log entry. The outline of the person icon will be highlighted in yellow once selected.



2 **Flag Important Logs:** Use the **Pin icon** to flag and highlight important updates. The flag functionality is only visible to admins and staff members.

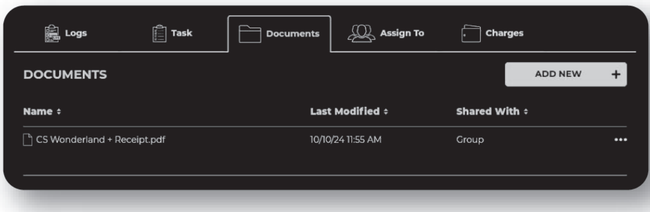
C Assigning Tasks

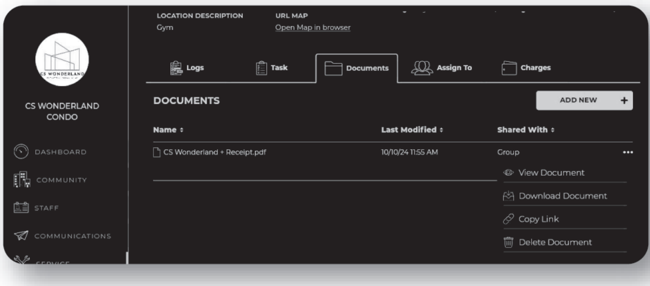


1 Adding a Task:

- Tasks can be described as work orders that are assigned to staff members. Staff can interact with the tasks by marketing them as complete, in progress, or could not complete. They can view their assigned tasks for the day to best manage their time.

D Uploading Documents

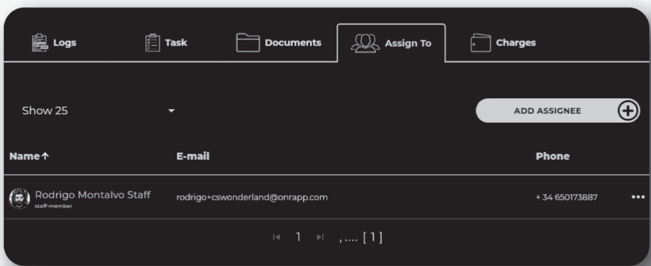




1 Manage Documents:

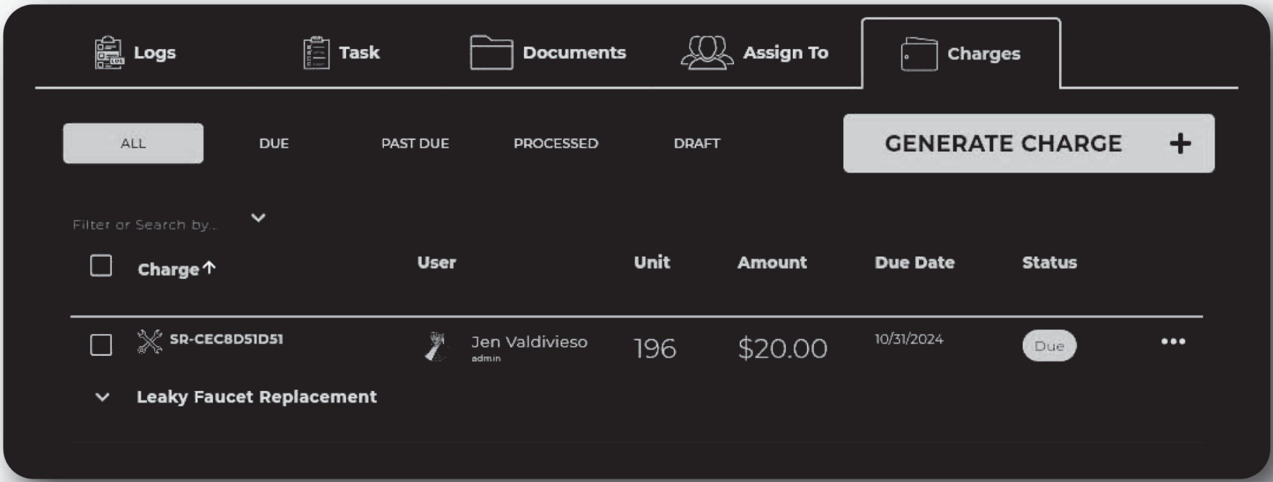
- Tap the **Documents icon** to upload documents (e.g., receipts, price estimates).
- Use the three dots on the right to **view, download, share, or delete** documents.

E Designating Assignees



1 Add an Assignee:

Click on the **"assign to"** tab
Select **+Add Assignee** and Search for your staff members name, clicking on the plus sign (+) to add them to the Service Request.
This assigned individual will receive an email alerting them that this service request has been assigned to them to complete.



F Managing Charges

1. **Generate Charges:**
   - If a charge is required, tap the **Charges icon** and select **Generate Charge.**
   - You can filter charges by **All, Due, Past Due, Processed, or Draft.**

If you have any problems or need additional assistance, don't hesitate to reach out to our dedicated support team at **support@onrapp.com**

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