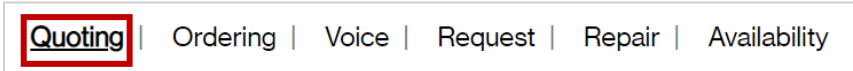




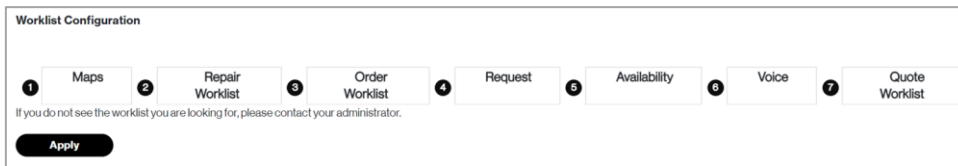
Worklists Job Aid

Things to Know

- Worklist availability is based on user roles
- If multiple worklists are displayed, the worklist display focus defaults to the worklist in the **first position**



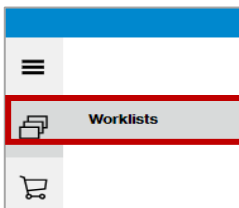
- Click **Profile** then **Worklist Configuration** to set the worklist display order



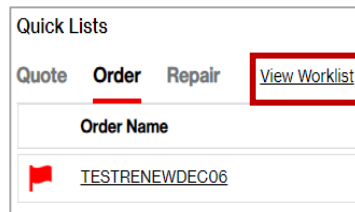
Getting Started

There are **three** ways to access the Worklist

Option 1: From **Hamburger Menu**



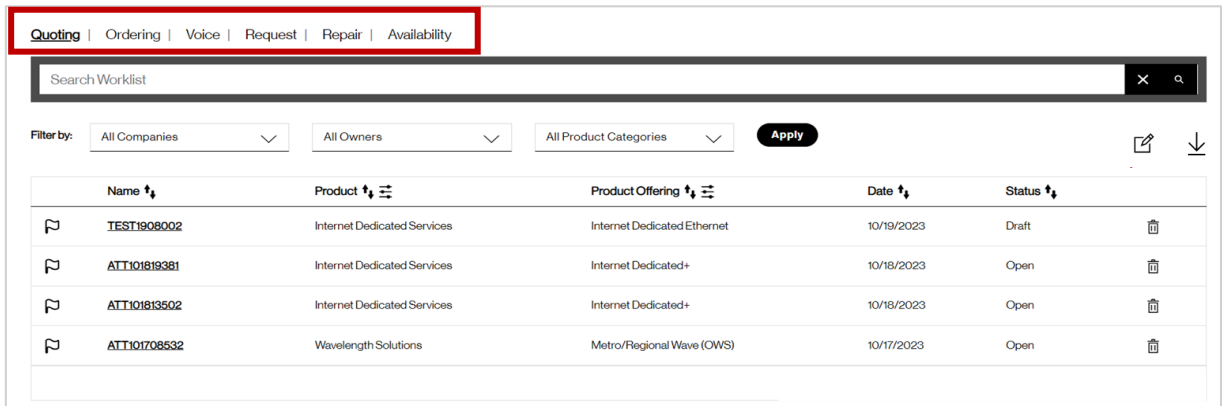
Option 2: From **Quick Lists**



3: From **My Quotes, Orders, Repairs, etc.**



Select the specific **Worklist** to search for or start a transaction



Worklists Job Aid

Worklist Features

Available search and filter options:

1. **Select** the worklist to be viewed from the available worklists
2. **Search Worklist** allows you to find a specific transaction
3. **Filter by** allows you to filter the worklist by Company, Owners, and/or Products
4. **Sort/Filter** worklist columns by clicking on icons
5. **Click** on the **Name** to view details
6. **View Status** of a specific transaction
7. **Flagged** transactions appear at the top of the worklist
8. **Download Worklist** download all worklist items on a page to a csv file

1

Quote | Order | Reservations | Availability | Request | Repair | Maps | Voice

Search Worklist 2

Filter by: All Companies | All Owners | All Product Categories | Apply 3

Name 4	Product 4	Product Offering 4	Date 4	Status 4
BS1075UJPLD01	Wavelength Solutions	Metro/Regional Wave (OWS)	11/09/2023	Open
ATT834272892	Internet Dedicated Services	Internet Dedicated Ethernet	01/20/2024	Open
ATT346749083	Wavelength Solutions	Metro/Regional Wave (OWS)	01/20/2024	Open
UPG100DNNI01	Dedicated E-Line	NNI Standalone	01/17/2024	Open

Quote | Order | Reservations | Availability | Request | Repair | Maps | Voice

Search Worklist

Filter by: All Companies | All Owners | All Product Categories | All Activity | Apply 8

Order Name 7	Project ID 5	Product 5	Product Offering 5	Submitted Date 7	Requested Due Date 7	Status 6	Milestone 7
RTCXUAT1945L-002		Internet Dedicated Services	Internet Dedicated+			Open	
RTCXUAT1698-015		Internet Dedicated Services	Internet Dedicated+	12/22/2023	02/23/2024	In Progress	Acceptance
.JSBTPUATATTSwETtsUniEvc0900Z		Switched E-Line Metro/Regional (TLS)	UNI/EVC Combo			New	
BEGEVPLP28098		Switched E-Line Metro/National (EVPL)	Point to Point			New	