Workspaces
from **XOLogic**

Introducing Workspaces

Workspaces is XOLogic's new look and enhanced back office experience. We have simplified your view to display the most popular features based on the most used tasks.

How Do You Know If You Have Workspaces?

Once logged in, examine the top right corner of your menu bar. If your menu looks like this ...

... then you are on Workspaces.

Right Side Bar

Step 1 of 6

The Right Side Bar has been redesigned to combine Account and Sub-Account access/functionality.

Accounts have a blue briefcase icon and light blue gradient background.

Sub-Accounts have a blue folder icon and are visually tethered to their corresponding Account with a gray line.
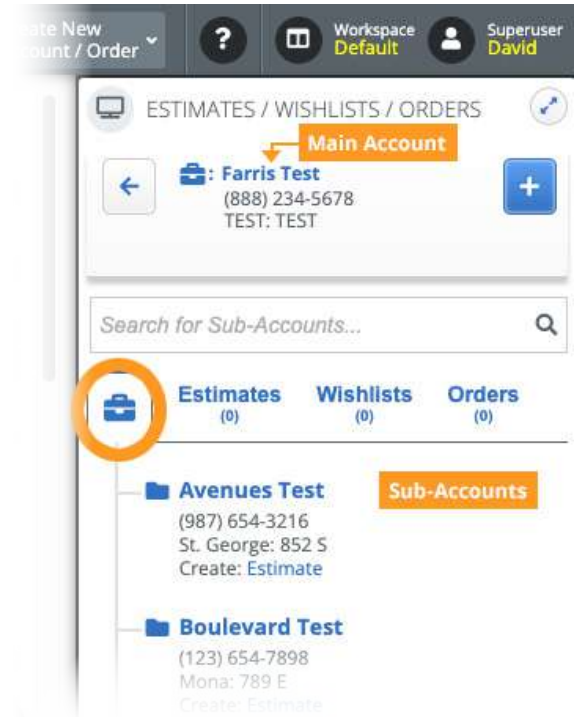
Account & Sub-Account information can be managed by hovering over the account, clicking the hamburger menu, and selecting an option from the drop-down.

![Workspaces from XOLogic logo]
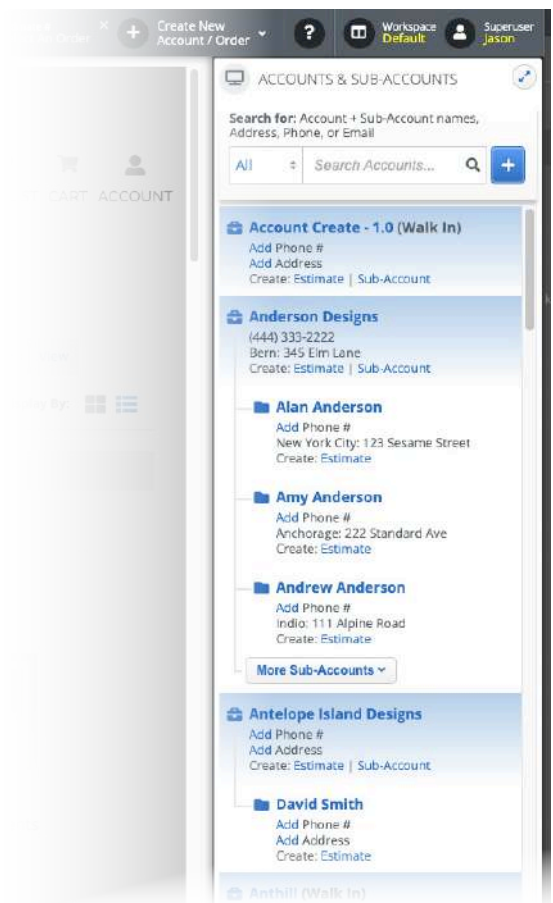
Right Side Bar, Continued

Once a main Account from the Right Side Bar has been chosen, you can access the main Account's Sub-Accounts via the tab with the briefcase icon.
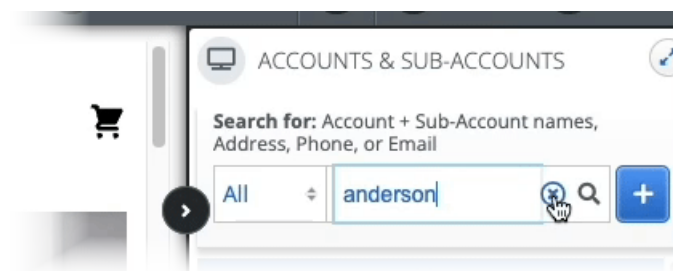
Account Search

Quickly locate **Accounts** and **Sub-Accounts** with just a few keystrokes.

Clear your query and return to the main list of accounts by clicking the 'x' to the right of your search term(s).

Advanced tip: *To quickly locate a specific Account + Sub-Account, type in first three characters of any word in an Account name and Sub-Account name. For example, if looking for the Account, "Franklin Fixturez" with the Sub-Account, "Beau Babbington" – you could enter: fra bab.*

Top Menu Bar

Easily create a new **Account** or **Order** from this option in the Top Menu Bar. By default, a new Account is designated as a **Basic Walk In Account**.

Depending on your selections in this dialogue, fields and drop-downs will become available so you can complete your task(s).
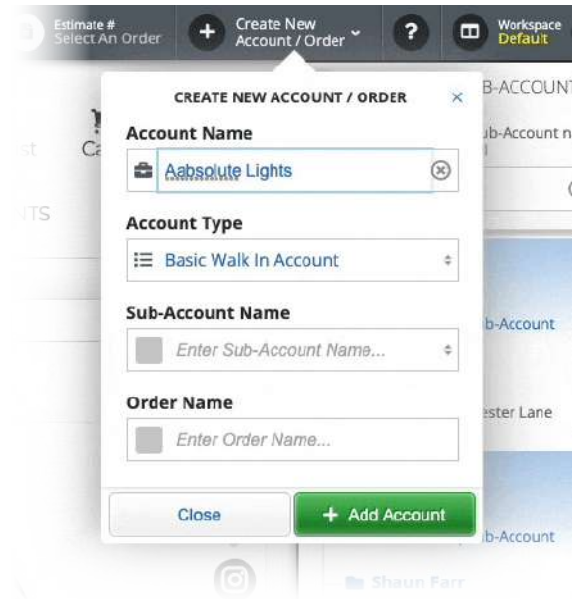
Top Menu Bar, Continued

Once an Account, Sub-Account, or Estimate/Order is chosen, these selections will appear in the Top Menu Bar.

Clicking the "Reset" button will remove all items from the Top Menu Bar and the Right Side Bar will return to its original appearance where you can start over and select another account.

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Need Help? Use The Resource Center

The question mark icon in the Top Menu Bar is how you can access our help menu or **Resource Center**.

Within the Resource Center you can create a Support Ticket, submit an issue specific to Workspaces, or access additional guides.
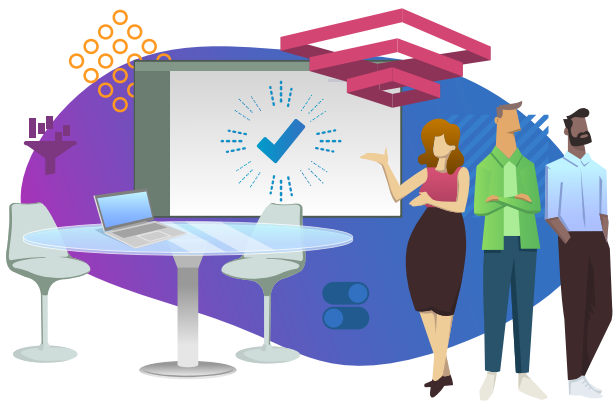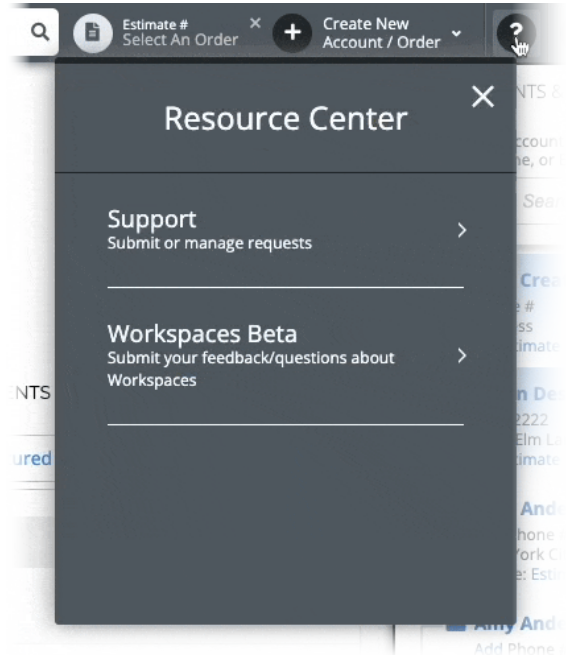
Walkthrough Complete

If you have any questions or issues regarding the features in this release, please contact our Client Services Team directly or use the Resource Center.

Email: clientservices@xologic.com
Phone: 844-934-3064