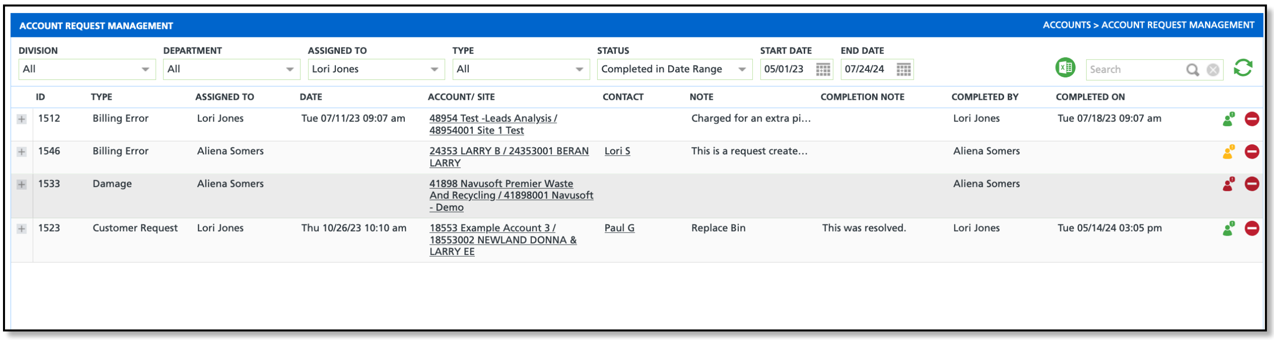
Account Request Management

Last Modified on 09/24/2024 9:54 am EDT

Pathway: Accounts > Accounts Request Management

The Account Request Management tool exhibits both customer-initiated and customer service-added account requests for all accounts. Upon entry, all open requests are displayed by default. To narrow down the displayed requests and review closed requests, you can utilize the filtering options located at the top of the screen.



Permissions

The following permissions are required to read, add, edit and delete account requests.

Permission ID	Permission Name	Description
383	Add / Edit Account Request	Necessary to edit the requests displayed on the screen.
384	Account Request Management	Necessary to view the Account Request Management screen.

Filter and Field Descriptions

The following filter and field descriptions apply to the Account Request Management screen.

Filter/Field	Description
Filters	
Division	Filters to display requests for the selected Division.
Department	Filters to display the requests for the selected Department.
Assigned To	Filters to display requests assigned to the selected user.
Type	Filters to display requests matching the selected Type.
Status	Filters to display requests by their Status. Find completed requests by selecting from the options.
Fields	
ID	Displays the system generated ID assigned to the request.
Type	Displays the customer selected reason for the request.
Assigned To	Displays the name of the user the request has been assigned to.

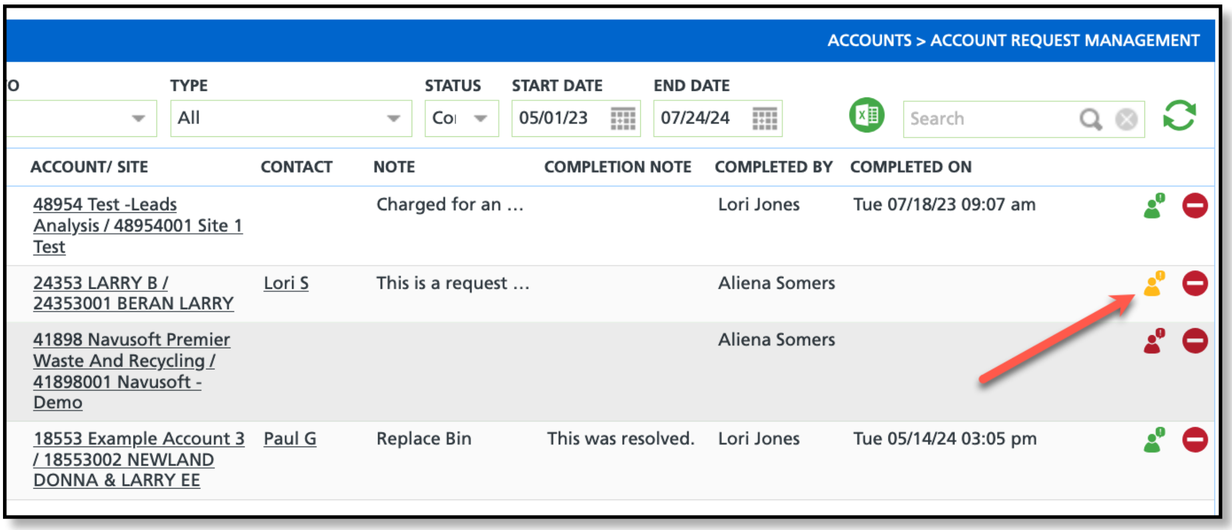
Date	Displays the date the request was created.
Account/Site	Displays the Account/Site ID and name.
Contact	Displays the name of the contact for the account. An email displays when the contacts email address was entered in the name field of the Add Contact tool for the account.
Note	Displays the note the customer entered in the request from the Customer Portal.
Completion Note	Displays the note that was entered in the Completion Note field of the Account Request.
Completed By	Displays the name of the user who resolved the request and changed it to a Completed status.
Completed On	Displays the date a request was completed.

Edit or Delete an Account Request

Edit Account Request

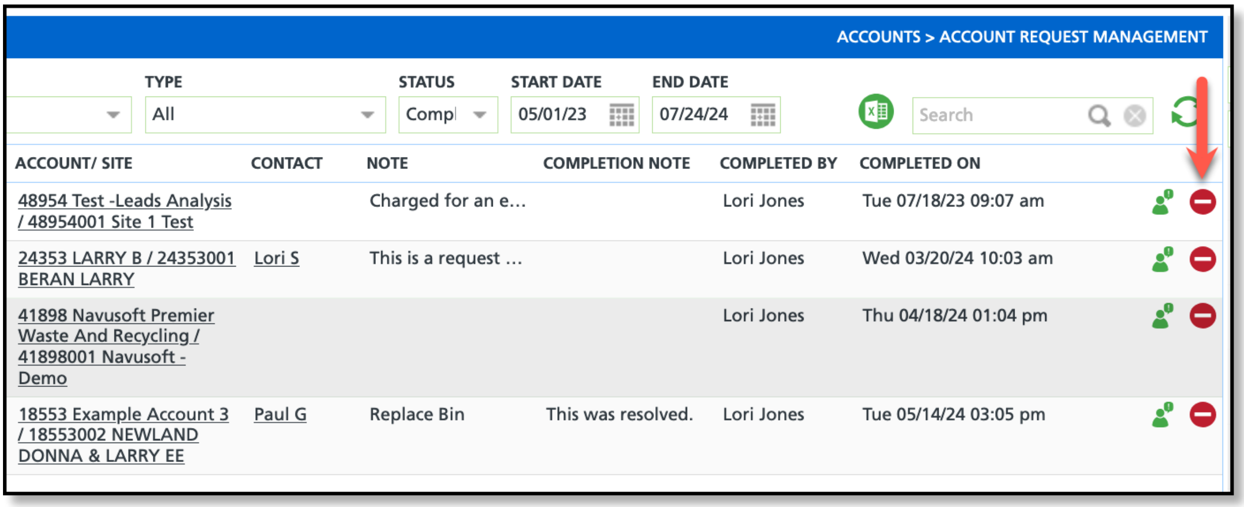
Using red, yellow, and green status indicators, users can quickly identify the status of an account request. Clicking on the icon will open the account request details.

- Green: Request is Closed
- Yellow: Request is Open
- Red: Request is on Hold



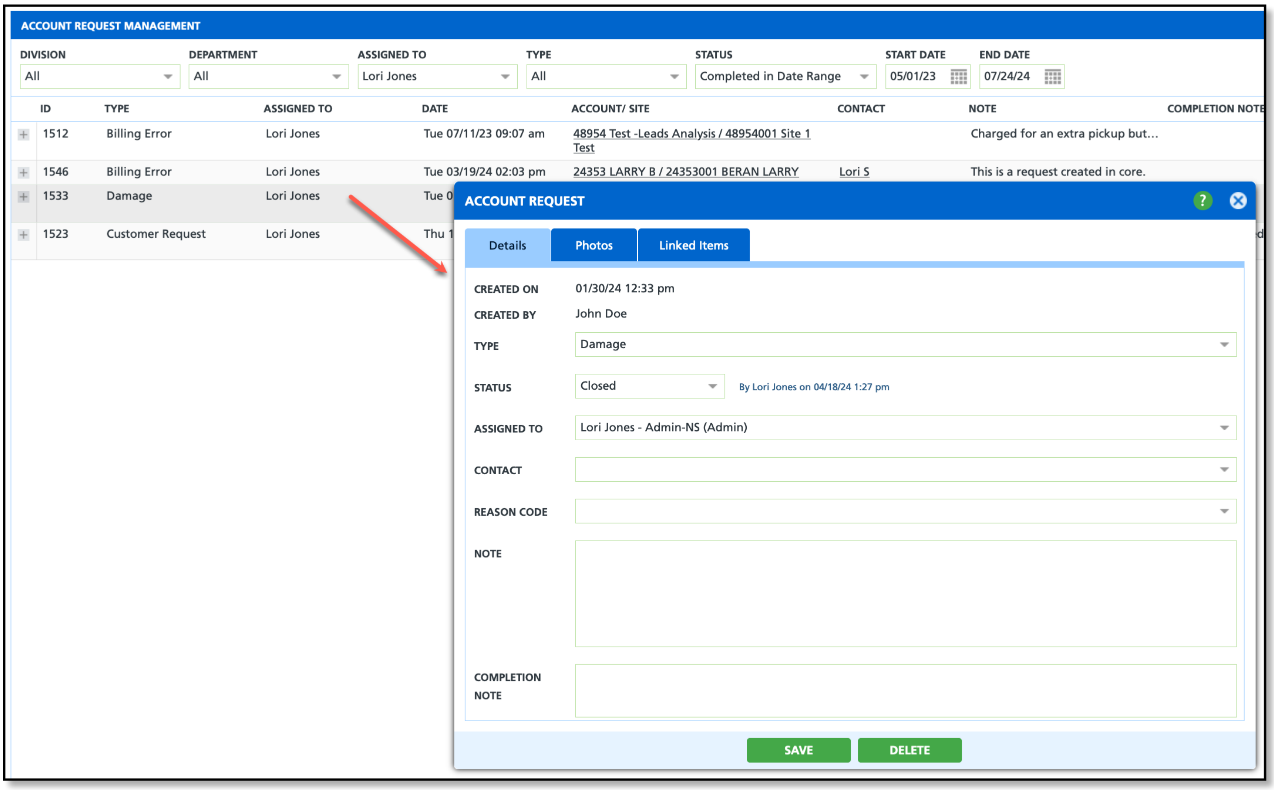
Delete Account Request

When the Delete icon is selected and the deletion is confirmed in the Confirmation popup, the account request will be permanently deleted and will not be accessible in the future.



Complete an Account Request

The following section applies to the individual account requests.



Details Tab

The Details tab provides comprehensive information about the request, including its current status.

Field Descriptions

Fields	Descriptions
Created On	Timestamped with the date the Request was received.

Fields	Descriptions
Created By	Displays the name of the account contact who made the request. An email displays when the contact's email address was entered in the name field of the Add Contact tool for the account.
Type	Indicates the reason for the request and helps in identifying next steps (i.e. who the request should be assigned to). Set up these Types in *Set Up > Account > Account Request Type.*
Status	Indicates the current status of a request. All new requests display as *Open* and will remain open until changed by a system user. Status' include: • Open - The request is new or is actively being worked. • Hold - The request has been reviewed and additional information is needed. • Completed - The request has been resolved. Completed requests can be reviewed using the Status filter on the Account Request Management screen.
Assigned To	The user assigned to the request.
Contact	Displays the name of the site contact. In some cases, an email displays if an email was entered in the name field of the Add/Edit Contact screen.
Reason Code	Identifies the request for internal purposes. Reason codes are created in *Set Up > System > Reason Code.*
Note	Displays the note entered by the customer.
Completion Note	Option to add a Completion Note detailing how the request was resolved for future referencing.

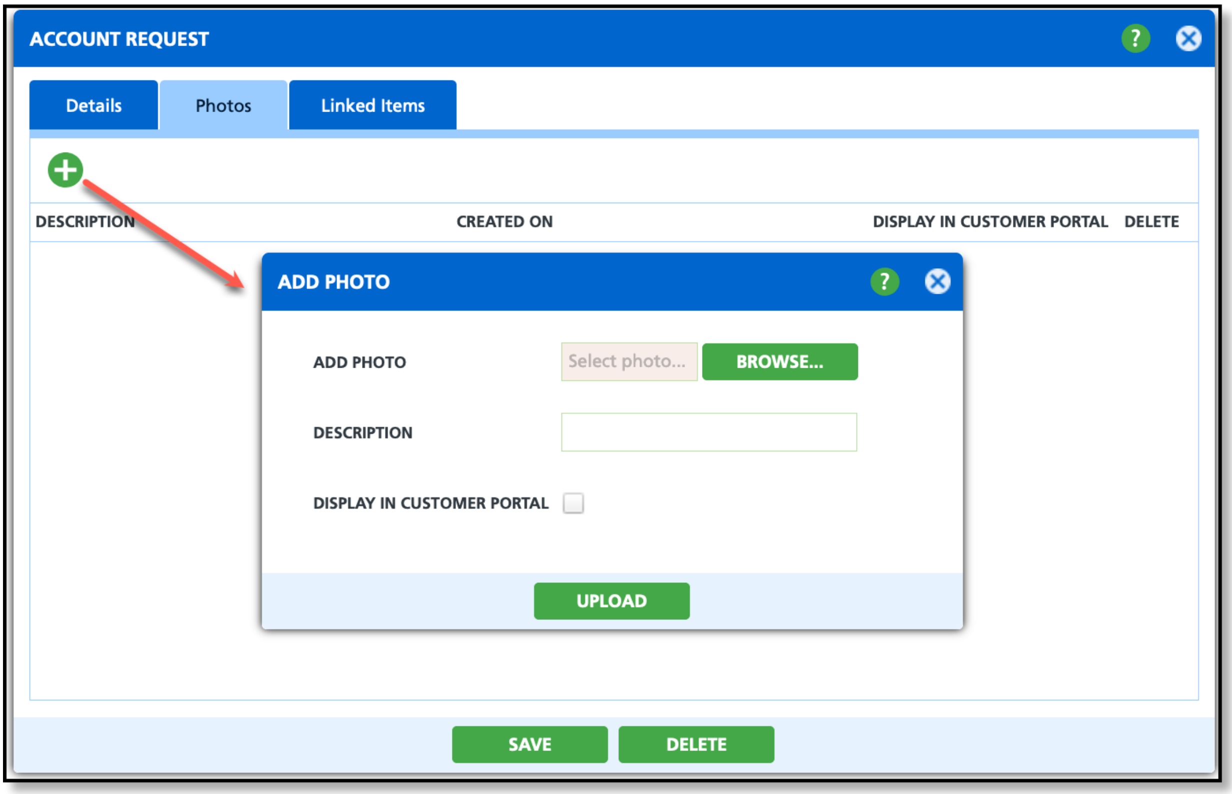
Complete a Request

Completed requests can still be reviewed using the Status filter on the Account Request Management screen.

1. Double click on request you would like to review.
2. Review the **Status**, **Reason Code** and **Note**.
3. Select **Complete** from the Status drop down AFTER the request has been resolved. ⚠ If the request is not resolved, it should be kept in either an 'Open' or 'Hold' status.
4. Include a **Completion Note** to record the resolution and any other notes relating to how the request was completed.
5. Click **Save** when finished.

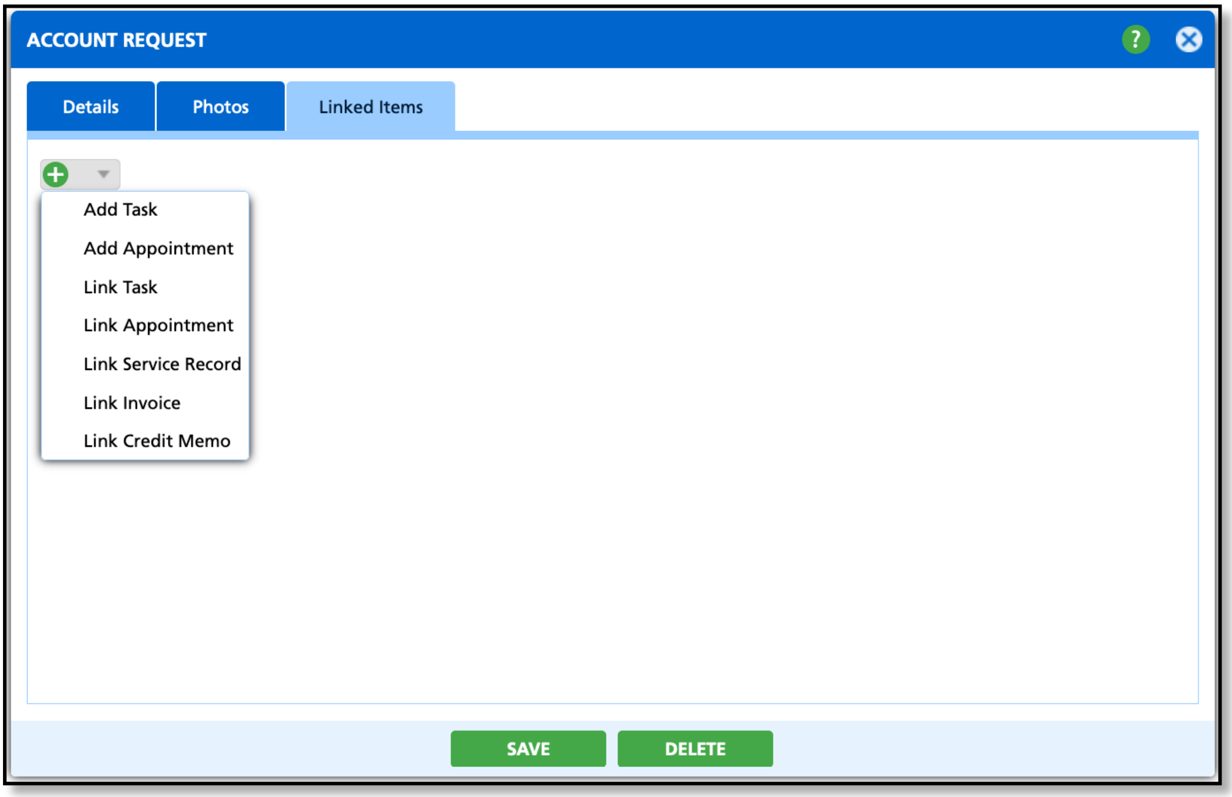
Photos Tab

Select the Photos tab to upload and attach photos to the request.



Linked Items Tab

Linked Items offers the option to associate or link appointments, tasks, service records, invoices, and credit memos with an account request, streamlining the process for its completion. The Linked Items tab only displays after the request has been created.



Linked Item	Descriptions
Add Task	If the request can not be immediately resolved and requires additional steps or resources to get involved, a task can be created to record what is needed and assigned to another user if necessary. Upon selection, the 'Add Task' window displays to create the task. Additional information about Tasks can be found here: Add Task
Add Appointment	If the request requires future follow-up, an appointment should be created. Upon selection, the 'Add Appointment' window displays to create the appointment. Additional information about creating appointments can be found here: Add Appointment
Link Task	Option to link an existing task on the account to the request. Upon selection, a listing of open tasks assigned to the account will display. Select the task(s) you would like linked to the request and then click save.
Link Appointment	Option to link an existing appointment on the account to the request. Upon selection, a listing of pending appointments for the account will display. Select the appointment(s) you would like linked to the request and then click save.
Link Service Record	Option to link a Service Record from the account to the request. Upon selection, a listing of service records for the account are displayed. Select the service record(s) you would like linked to the request and then click save.
Link Invoice	Option to link an available invoice for the account to the request. Upon selection, a listing of available invoices created for the account are displayed. Select the invoice(s) you would like linked to the request and then click save.
Link Credit Memo	Option to link a credit memo on the account to the request. Upon selection, a listing of Credit Memos created for the account are displayed. Select which credit memo(s) you would like linked to the request and then click save.

Related Articles

Account Request Type Setup
Add Task
Add Appointment