



<b>Contact</b>	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.
<b>Note</b>	The note the customer entered in the request from the Customer Portal.
<b>Completion Note</b>	The note that was entered in the Completion Note field of the Account Request.
<b>Completed By</b>	The name of the user who resolved the request and changed it to a Completed status.
<b>Completed On</b>	The date a request was completed.

## Quick Status Check

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

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

## Edit Account Request

To edit an Account Request, either double click on the row in the Account Request Management screen or click on the colored person status indicator at the end of the row. Upon using either method, the Account Request screen is displayed.

The screenshot displays the 'ACCOUNT REQUEST MANAGEMENT' interface. At the top, there are filters for Division, Department, Assigned To, Type, Status, Start Date, and End Date. Below the filters is a table with columns: ID, Type, Assigned To, Date, Account/ Site, Contact, Note, and Completion Note. A red arrow points from the 'Damage' row (ID 1533) to a pop-up 'ACCOUNT REQUEST' details window. This window has tabs for 'Details', 'Photos', and 'Linked Items'. The 'Details' tab is active, showing fields for:
 

- CREATED ON: 01/30/24 12:33 pm
- CREATED BY: John Doe
- TYPE: Damage (dropdown)
- STATUS: Closed (dropdown) with a note 'By Lori Jones on 04/18/24 1:27 pm'
- ASSIGNED TO: Lori Jones - Admin-NS (Admin) (dropdown)
- CONTACT: (empty dropdown)
- REASON CODE: (empty dropdown)
- NOTE: (empty text area)
- COMPLETION NOTE: (empty text area)

 At the bottom of the details window are 'SAVE' and 'DELETE' buttons.

### Details Tab - Field Descriptions

Fields	Descriptions
Created On	Timestamped with the date the Request was received.
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 <a href="#">Set Up &gt; Account &gt; Account Request Type</a> .
Status	Indicates the current status of a request. All new requests display as <i>Open</i> and will remain open until changed by a system user. Status' include: <ul style="list-style-type: none"> <li>• Open - The request is new or is actively being worked.</li> <li>• Hold - The request has been reviewed and additional information is needed.</li> <li>• Completed - The request has been resolved. Completed requests can be reviewed using the Status filter on the Account Request Management screen.</li> </ul>
Assigned To	The user assigned to the request.
Contact	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	The request for internal purposes. Reason codes are created in <a href="#">Set Up &gt; System &gt; Reason Code</a> .
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.

## Delete Account Request

When deleting and after confirming via the confirmation prompt, the account request will be permanently deleted and will not be accessible in the future.

There are two ways to delete an Account Request, from the Account Request Management screen or from within the Account Request itself.

1. From the Account Request Management screen, select the red - circle icon.

ACCOUNTS > ACCOUNT REQUEST MANAGEMENT						
TYPE	STATUS	START DATE	END DATE			
All	Comp	05/01/23	07/24/24	<input type="text" value="Search"/>		
ACCOUNT/ SITE	CONTACT	NOTE	COMPLETION NOTE	COMPLETED BY	COMPLETED ON	
48954 Test -Leads Analysis / 48954001 Site 1 Test		Charged for an e...		Lori Jones	Tue 07/18/23 09:07 am	
24353 LARRY B / 24353001 BERAN LARRY	Lori S	This is a request ...		Lori Jones	Wed 03/20/24 10:03 am	
41898 Navusoft Premier Waste And Recycling / 41898001 Navusoft - Demo				Lori Jones	Thu 04/18/24 01:04 pm	
18553 Example Account 3 / 18553002 NEWLAND DONNA & LARRY EE	Paul G	Replace Bin	This was resolved.	Lori Jones	Tue 05/14/24 03:05 pm	

2. From within the Account Request, select the Delete button.

ACCOUNT REQUEST

Details
Photos
Linked Items

CREATED ON: 05/04/23 6:20 am

CREATED BY: loris@navusoft.com

TYPE: Customer Request

STATUS: Open

ASSIGNED TO: [Empty]

CONTACT: Lori

REASON CODE: [Empty]

NOTE: added on portal

COMPLETION NOTE: [Empty]

SAVE
DELETE

In both cases, after selecting delete, the Delete Confirmation popup will be displayed. Select 'Yes' to permanently delete the account request.

ACCOUNT REQUEST

Details
Photos 1
Linked Items 1

CREATED ON: 05/03/23 10:43 am

CREATED BY: Michael Shannon - Tech Guy (Admin)

TYPE: Missed Pick Up

STATUS: Open

ASSIGNED TO: Alexis Garza - C

CONTACT: [Empty]

REASON CODE: [Empty]

NOTE: [Empty]

COMPLETION NOTE: [Empty]

**CONFIRMATION**

Are you sure you want to delete this Account Request?

YES
NO

SAVE
DELETE

## Complete an Account Request

Completing or Closing an existing Account Request includes entering information for auditing and reporting purposes and updating the status.

The screenshot displays the 'ACCOUNT REQUEST MANAGEMENT' interface. At the top, there are filters for DIVISION (All), DEPARTMENT (All), ASSIGNED TO (Lori Jones), TYPE (All), STATUS (Completed in Date Range), START DATE (05/01/23), and END DATE (07/24/24). Below the filters is a table of account requests:

ID	TYPE	ASSIGNED TO	DATE	ACCOUNT/ SITE	CONTACT	NOTE	COMPLETION NOTE
1512	Billing Error	Lori Jones	Tue 07/11/23 09:07 am	48954 Test -Leads Analysis / 48954001 Site 1 Test		Charged for an extra pickup but...	
1546	Billing Error	Lori Jones	Tue 03/19/24 02:03 pm	24353 LARRY B / 24353001 BERAN LARRY	Lori S	This is a request created in core.	
1533	Damage	Lori Jones	Tue 0				
1523	Customer Request	Lori Jones	Thu 1				

A red arrow points from the 'Damage' request (ID 1533) to a modal window titled 'ACCOUNT REQUEST'. The modal has tabs for 'Details', 'Photos', and 'Linked Items'. The 'Details' tab is active, showing the following information:

- CREATED ON: 01/30/24 12:33 pm
- CREATED BY: John Doe
- TYPE: Damage
- STATUS: Closed (By Lori Jones on 04/18/24 1:27 pm)
- ASSIGNED TO: Lori Jones - Admin-NS (Admin)
- CONTACT: [Empty field]
- REASON CODE: [Empty field]
- NOTE: [Empty text area]
- COMPLETION NOTE: [Empty text area]

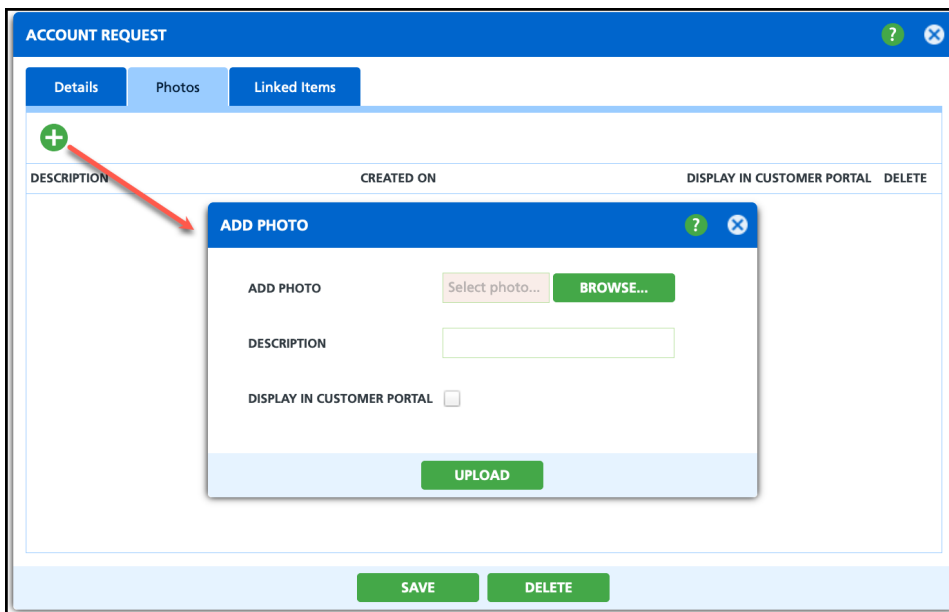
At the bottom of the modal are 'SAVE' and 'DELETE' buttons.

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.

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

## Add Photos to Account Request

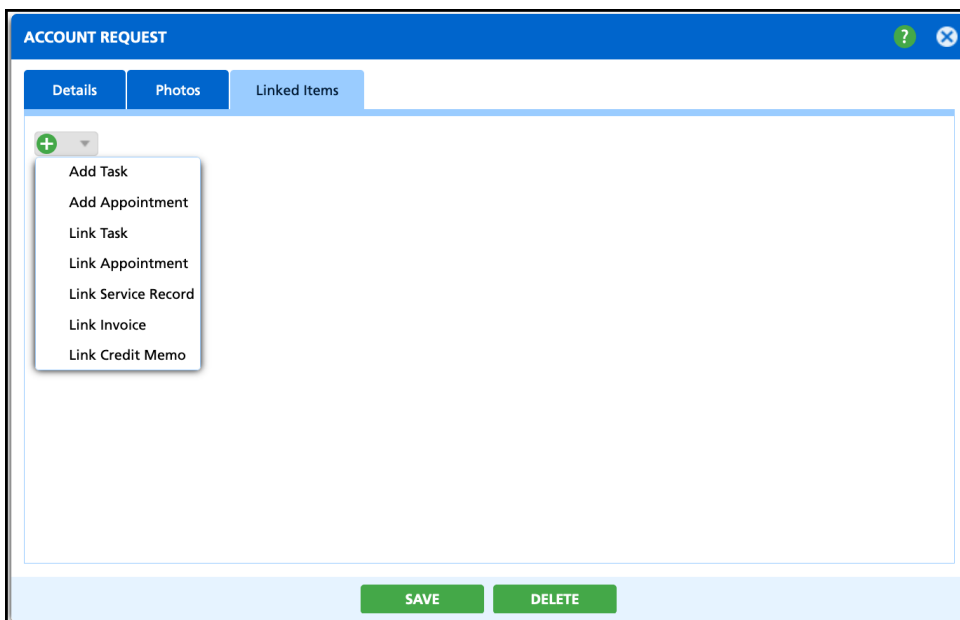
Select the Photos tab to upload and attach photos to the request.



1. Click on the **Photos** tab.
2. Use the Browse button to find the photo on your device.
3. Provide a brief description.
4. Check the **Display in Customer Portal** box if the photo should be visible to the customer.
5. Select **Upload**.

## Link Items to an Account Request

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  
Actions**

**Descriptions**

<b>Add Task</b>	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: <a href="#">Add Task</a>
<b>Add Appointment</b>	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: <a href="#">Add Appointment</a>
<b>Link Task</b>	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.
<b>Link Appointment</b>	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.
<b>Link Service Record</b>	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.
<b>Link Invoice</b>	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.
<b>Link Credit Memo</b>	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.

## Enabling Customer Generated Account Requests

In order for customers to be given the ability to submit account requests themselves, the [customer portal](#) must be configured correctly including setup for each Account Request Type. Each type of Account Request can be configured to allow or not allow customers to create from the customer portal. This is set in [Account Request Type Setup](#).

ACCOUNT REQUEST TYPE SETUP SETUP > ACCOUNT > ACCOUNT REQUEST TYPE

ID	NAME	TYPE	ACTIVE	ALLOW SELF-SERVICE ORDERING	ASSIGN USER BY DEFAULT	DEPARTMENT
1000	Billing Error	Billing	Yes	No	Account Manager	Sales
1001	Refund Request	Billing	Yes	No	Account Manager	Customer Service
1002	Missed Pick Up	Service	Yes	No	Account Manager	Sales
1003	Vacation Hold Services	Service	Yes	No	Account Manager	
1004			Yes	No	Account Manager	
1005			Yes	No	Account Manager	Customer Service
1006			Yes	No	Account Manager	
1007			Yes	No	Account Manager	Operations
1008			Yes	No	Account Manager	Sales
1009			Yes	No	Account Manager	Admin
1010			Yes	No	Account Manager	
1011			Yes	Yes	Account Auditor	Operations
1012			Yes	No	Account Manager	
1013			Yes	No	Account Manager	Admin
1014			Yes	Yes	Account Manager	Customer Service
1015			No	No	Account Manager	
1016			No	No	Account Manager	Operations

**ADD ACCOUNT REQUEST TYPE**

NAME:

TYPE:

ACTIVE:

**ALLOW SELF-SERVICE ORDERING:**

ASSIGN USER BY DEFAULT:

DEPARTMENT:

## Permissions

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

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

## Related Articles

[Add Account Request](#)

[Add Task](#)

[Add Appointment](#)

[Account Request Type Setup](#)