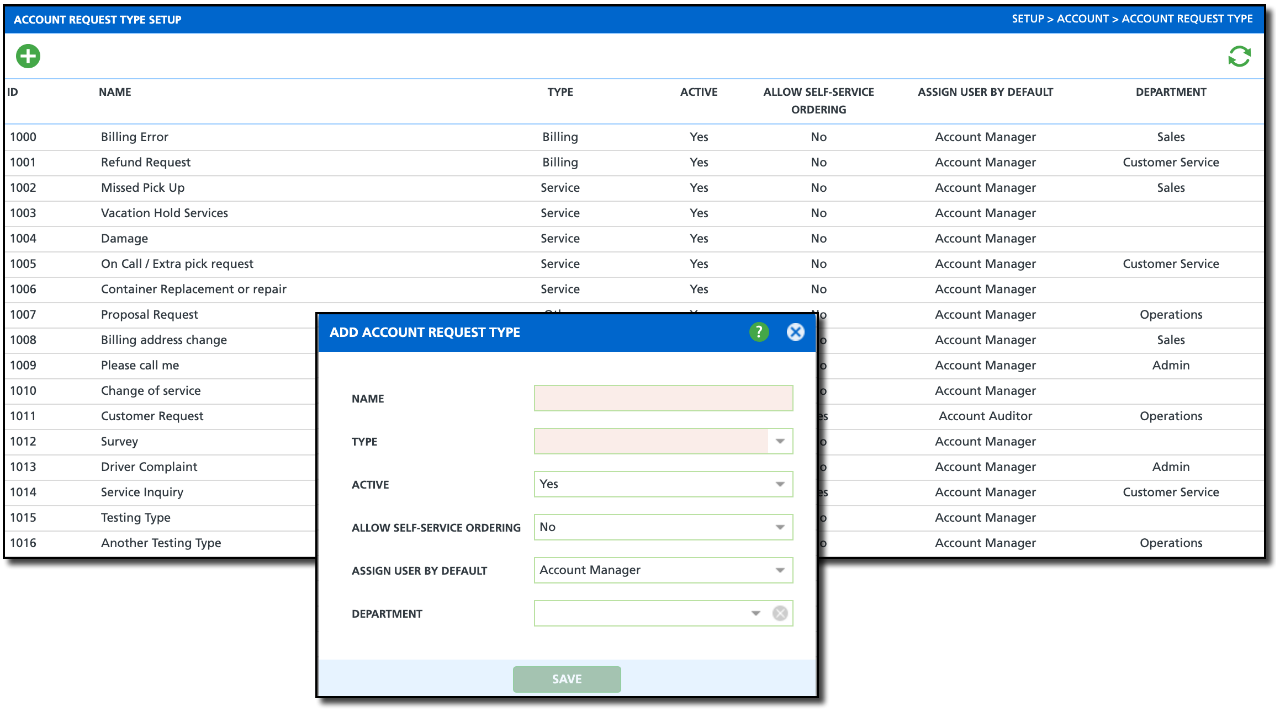
Account Request Type Setup

Last Modified on 10/24/2024 12:50 pm PDT

Pathway: *Setup > Account > Account Request Type*

The Account Request Type Setup screen allows users to generate a wide range of request types that can be selected when creating a request for an account. Having a standardized set of account requests also assists in filtering on specific request types within the Account Request Management tool.



Field Descriptions

Field	Description
Name	The name for the account request that displays for user selection.
Type	Categorizes the request type.
Active	Controls if the request is available for use.
Allow Account Portal Entry	Allows account requests to be created in the account portal. Requests received from the account portal will display in Account Request Management.
Assign User By Default	Automatically assigns account requests received from the portal to the identified user type. When a request is received from the account portal, the user assigned will be alerted.
Department	Option to categorize requests by department. In Account Request Management, requests can be filtered by department.

Add Account Request Type

1. Click the **green +** to open the Add Account Request Type editor.
2. Complete the following required fields:
    - Enter a **Name** for the account request.
    - Select the **Type** of account request for the department it will applied to.
3. Set the **Active** status to 'Yes' to make the request type available for use.
4. Complete additional fields based on your company's established procedures.
5. Click **Save** when finished.

Related Articles:

Account Request Management
Add Account Request