Account Request Type Setup

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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.

CCOUNT R	REQUEST TYPE SETUP		SETUP > ACCOUNT > ACCOUNT REQUEST					
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	NAME		ТҮРЕ	ACTIVE	ALLOW SELF-SERVICE ORDERING		ASSIGN USER BY DEFAULT	DEPARTMENT
000	Billing Error		Billing	Yes	N	lo	Account Manager	Sales
001	Refund Request		Billing	Yes	N	10	Account Manager	Customer Service
002	Missed Pick Up		Service	Yes	N	10	Account Manager	Sales
003	Vacation Hold Services		Service	Yes	N	10	Account Manager	
004	Damage		Service	Yes	Ν	10	Account Manager	
005	On Call / Extra pick request		Service	Yes	N	10	Account Manager	Customer Service
006	Container Replacement or repair		Service	Yes	Ν	10	Account Manager	
007	Proposal Request		01			0	Account Manager	Operations
800	Billing address change	ADD ACCOUNT REQUEST TYPE			2 😣	0	Account Manager	Sales
009	Please call me					0	Account Manager	Admin
010	Change of service	NAME				0	Account Manager	
011	Customer Request					es	Account Auditor	Operations
012	Survey	ТҮРЕ			-	0	Account Manager	
013	Driver Complaint					0	Account Manager	Admin
014	Service Inquiry	ACTIVE	Yes		*	es	Account Manager	Customer Service
015	Testing Type	ALLOW SELF-SERVICE ORDERING	No		-	0	Account Manager	
016	Another Testing Type	ALLOW SELF SERVICE ONDERING				0	Account Manager	Operations
		ASSIGN USER BY DEFAULT	Account Manager		~			
		DEPARTMENT			- ®			

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Field Descriptions

Field	Description
Name	The name for the account request that displays for user selection.
Туре	Categorizes the request type.
Active	Controls if the request is available for use.
Allow Account Portal	Allows account requests to be created in the account portal. Requests received from
Entry	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