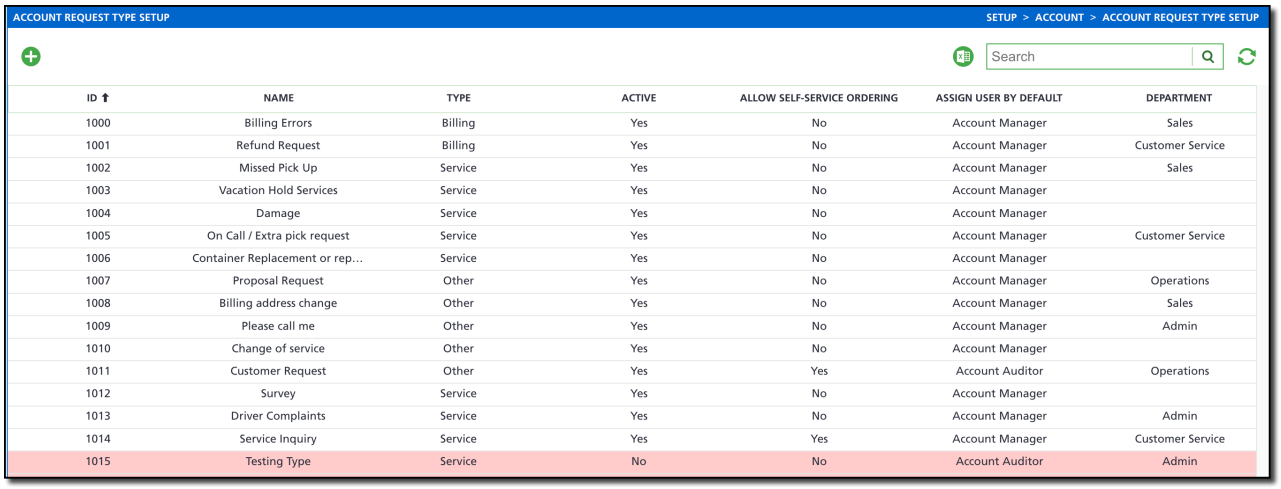
Account Request Type Setup

Last Modified on 10/09/2026 12:54 pm PDT

Pathway: *Setup > Account > Account Request Type*

Account Request Type Setup 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.



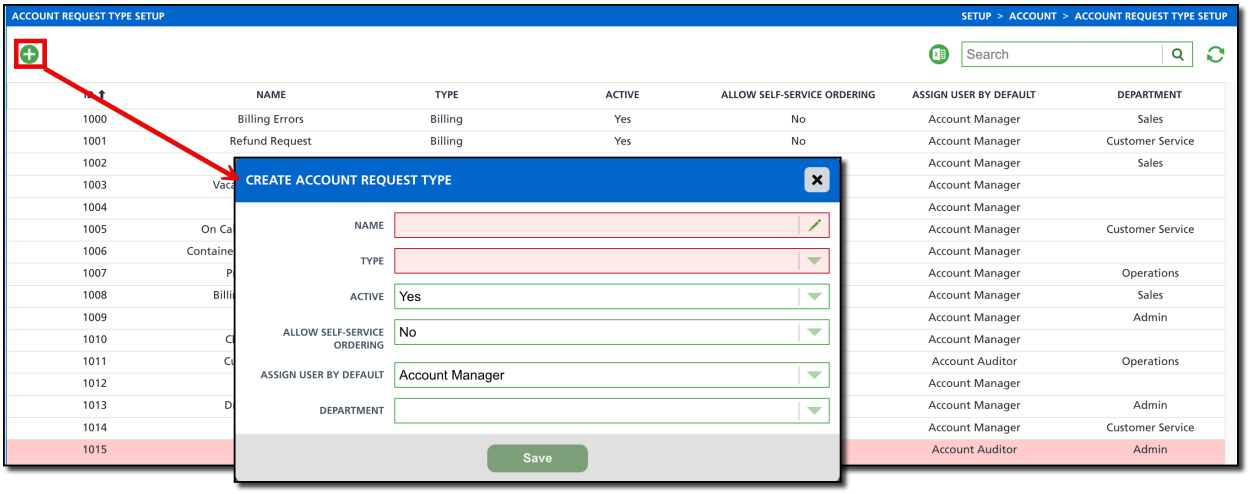
ID	NAME	TYPE	ACTIVE	ALLOW SELF-SERVICE ORDERING	ASSIGN USER BY DEFAULT	DEPARTMENT
1000	Billing Errors	Billing	Yes	No	Account Manager	Sales
1001	Refund Request	Billing	Yes	No	Account Manager	Customer Service
1002	Missed Pick Up	Service	Yes	No	Account Manager	Sales
1003	Vacation Hold Services	Service	Yes	No	Account Manager	
1004	Damage	Service	Yes	No	Account Manager	
1005	On Call / Extra pick request	Service	Yes	No	Account Manager	Customer Service
1006	Container Replacement or rep...	Service	Yes	No	Account Manager	
1007	Proposal Request	Other	Yes	No	Account Manager	Operations
1008	Billing address change	Other	Yes	No	Account Manager	Sales
1009	Please call me	Other	Yes	No	Account Manager	Admin
1010	Change of service	Other	Yes	No	Account Manager	
1011	Customer Request	Other	Yes	Yes	Account Auditor	Operations
1012	Survey	Service	Yes	No	Account Manager	
1013	Driver Complaints	Service	Yes	No	Account Manager	Admin
1014	Service Inquiry	Service	Yes	Yes	Account Manager	Customer Service
1015	Testing Type	Service	No	No	Account Auditor	Admin

Field Descriptions

Field	Description
Name *Required*	The name for the account request that displays for user selection.
Type *Required*	Select either Billing, Other, Sales, or Services to categorize the Account Request Type.
Active	Controls if the request is available for use.
Allow Self-Service Ordering	A configuration trigger (yes/no) that enables customers to submit requests directly via the customer portal. When this field is enabled for a specific request type, a **"Create Request"** button becomes visible on the customer portal, allowing users to initiate that specific type of request (e.g., a billing address change or a service inquiry).
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 an Account Request Type

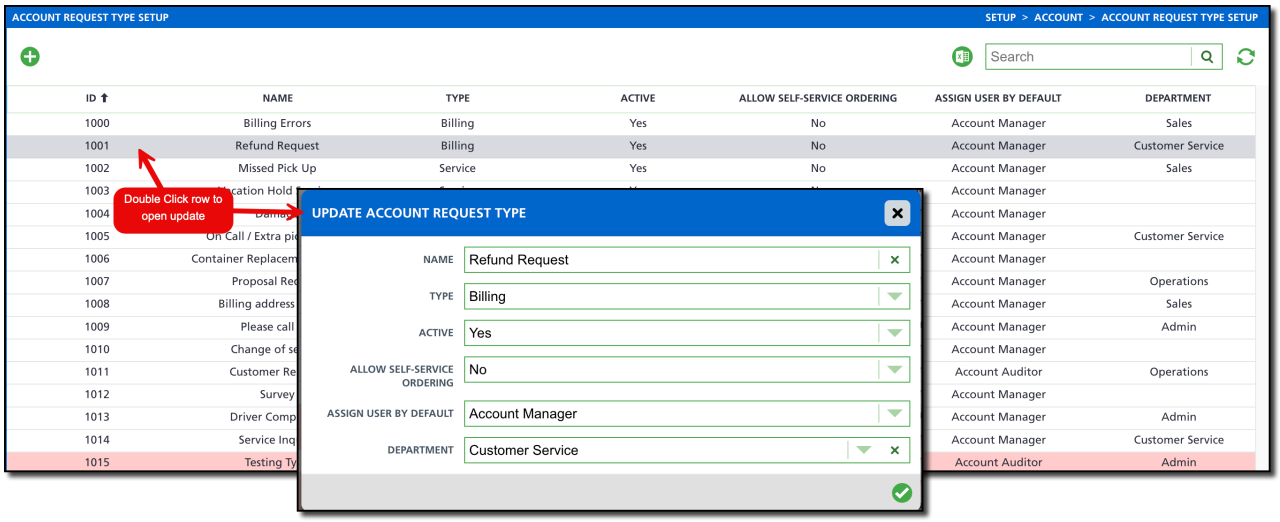
To add an Account Request Type, use the following steps. Once created and active, it will be available for selection in drop-downs and filters within the system.



1. Click the **green +** to open the Add Account Request Type editor.
2. Complete the following required fields:
    - Enter a distinct and descriptive **Name** for the account request.
    - Select the **Type** of account request for the department it will applied to. This is a system defined list and includes Billing, Other, Sales, and Service.
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.

Edit an Account Request Type

To edit and disable/enable an existing Account Request Type use the following steps.



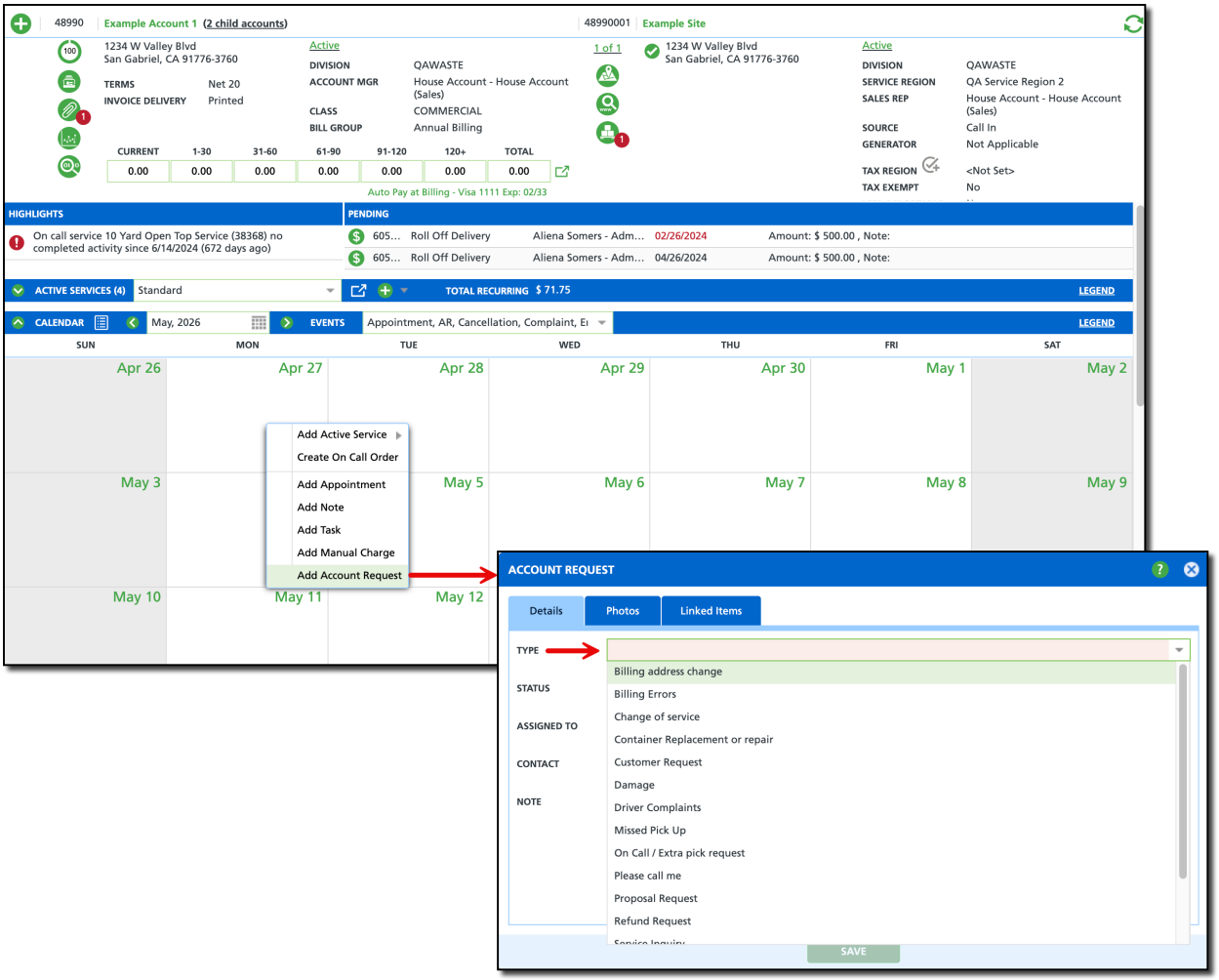
1. Double click on the Account Request Type to be modified to open the Update Account Request Type screen.
2. Edit fields displayed based on your established practice and procedures
3. To disable the Account Request Type, select '**No**' from the **Active** drop down field. If disabled, it will no longer show as an option in the Account Request Type dropdown list.
4. The system automatically saves the changes.

Application of an Account Request Type

After an Account Request Type has been set up, it can be selected when creating a new request from the Account screen and when needing to filter Account Requests. See below to identify where this field appears in the system.

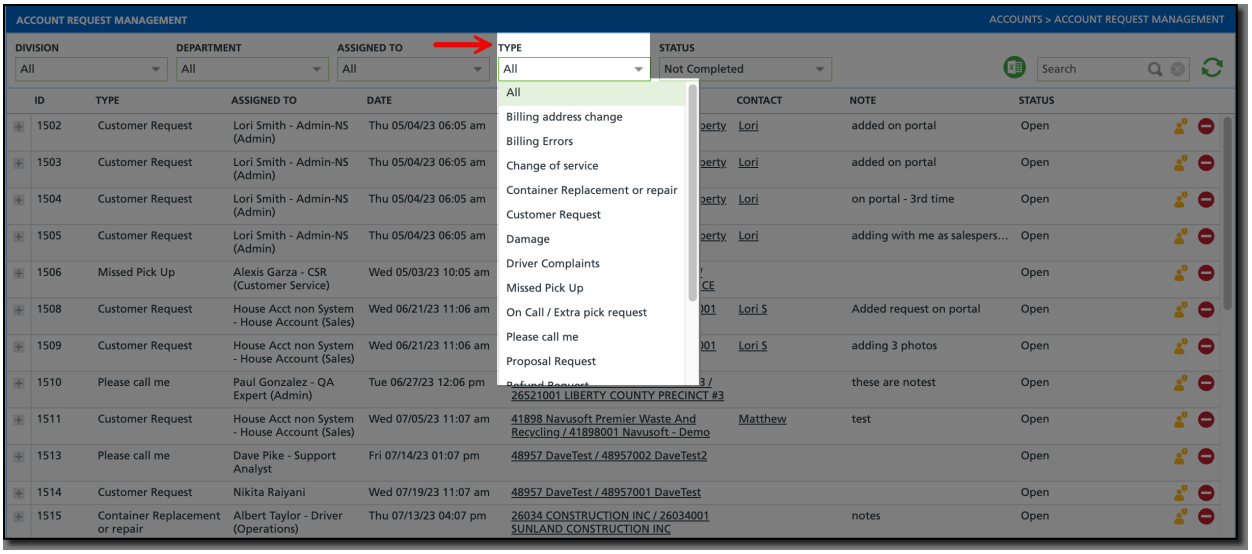
Adding an Account Request

Pathway: *Accounts > Calendar > [Right Click on Day] > Add Account Request*



Filtering Account Requests

Pathway: *Accounts > Account Request Management*



Related Articles

Account Request Management
Add Account Request