Add Account Request

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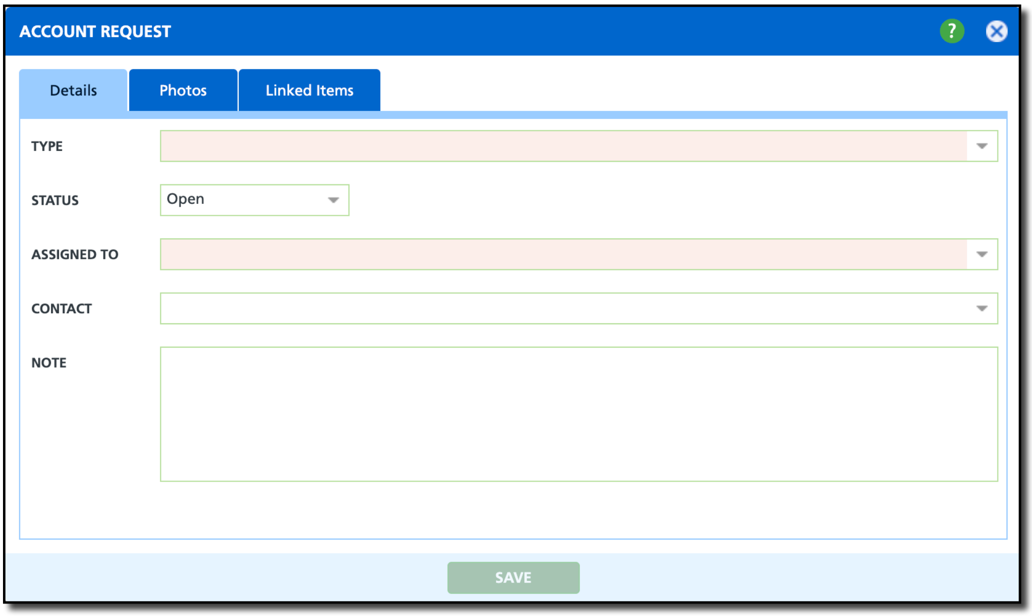
Pathway: *Accounts > Search > Customer Account*

The following article details how to create an Account Request from the Customer Service screen. An account request is a specific action or information requested by a customer and can be added from either the account's menu or directly from an account's calendar.

Once a request is made, it is sent to the Account Request Management tool, where it can be tracked, updated, and managed through every stage of the process, ensuring efficient communication and task completion. It is also visible in the Assigned user's Account Request notifications.

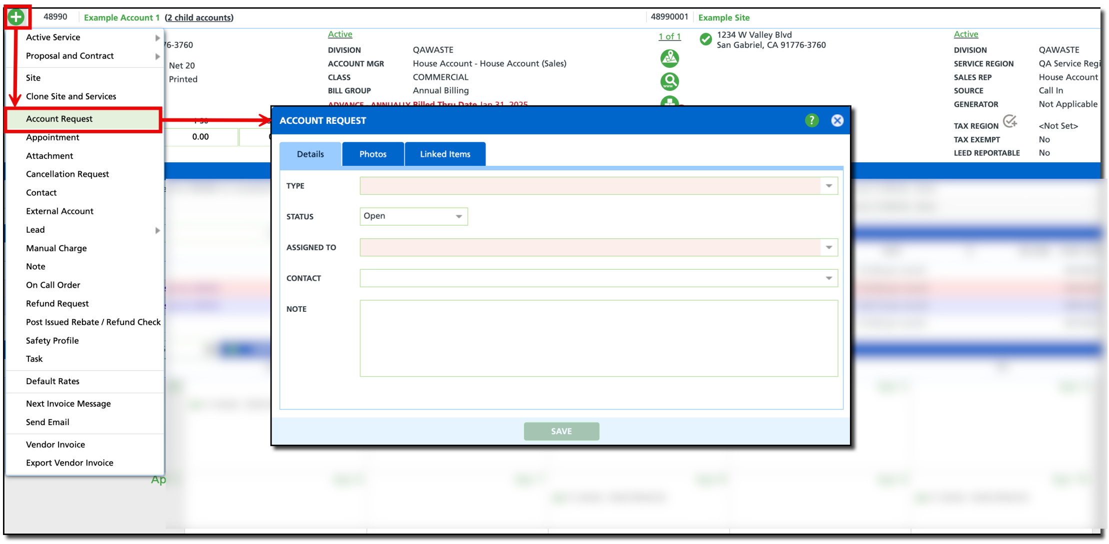


Add an Account Request

Account Requests can be added from two locations within the customer service screen: the Account Menu and the Account Calendar.

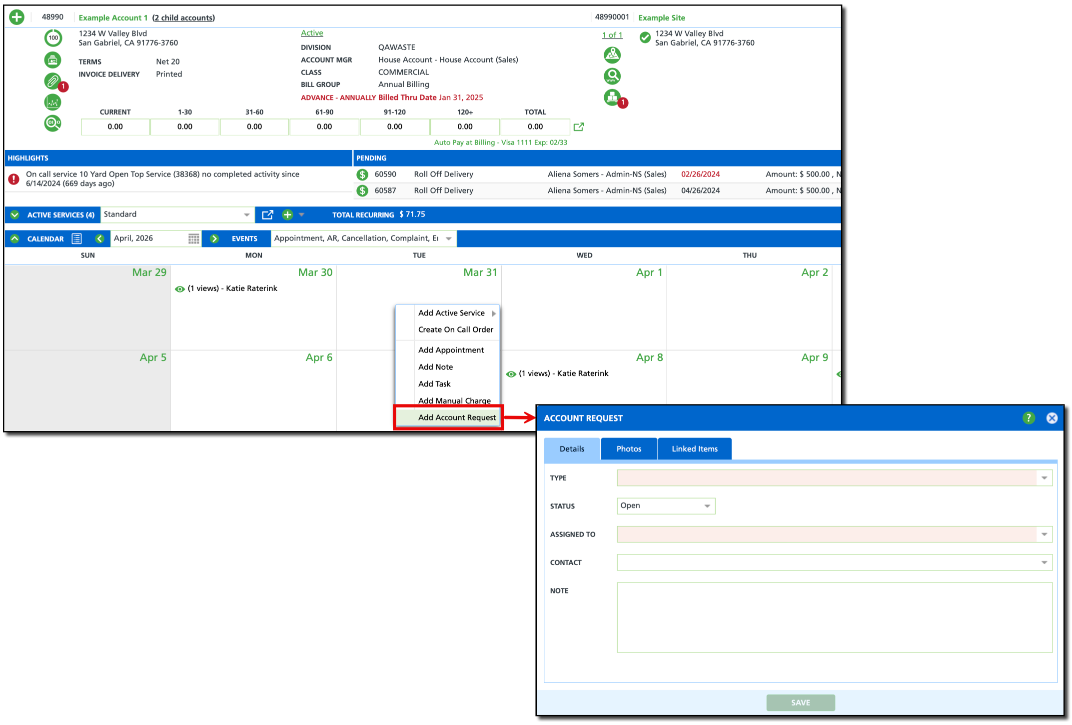
Add via Account Menu

1. Click on the **green +** icon at the top left of the account screen.
2. Select **'Account Request'** from the list of options. This will open the *Account Request* editor.



Add via Calendar

1. Right-click on the **calendar date** the appointment applies.
2. Select '**Add Account Request**' from the popup that displays. This will open the *Account Request* editor.



Steps to Add an Account Request

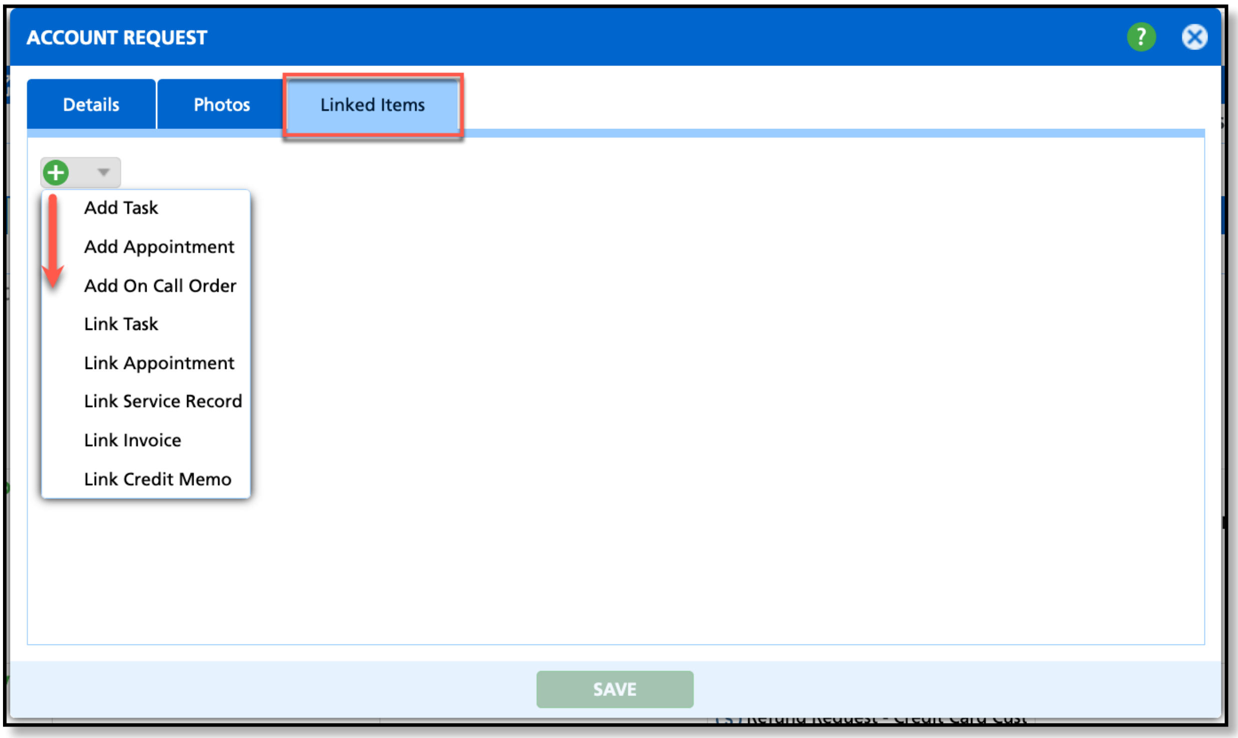
After accessing the Account Request screen via the calendar or the Account menu, follow these steps to**add the Account Request:**

1. Select the **Type** that best classifies the reason for the request.
   Note: The Type options are created in Setup > Account > Account Request Type.
2. Select the current **Status** of the request. By default, a new request's status is set to 'Open.'
3. Select the user the request should be **Assigned To.**
4. Select the account **Contact** to identify who the contact is for additional followup and review.
5. Add a **Note** for further instruction or details regarding the request, contact information and any other supporting information a user needs to complete the request.

6. Upload relevant images to the request.
    a. Click on the Photos tab.
    b. Provide a brief description.
    c. Check the **Display in Customer Portal** box if the photo should be visible to the customer.
7. Click **Save** when finished.

Link Items to 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.



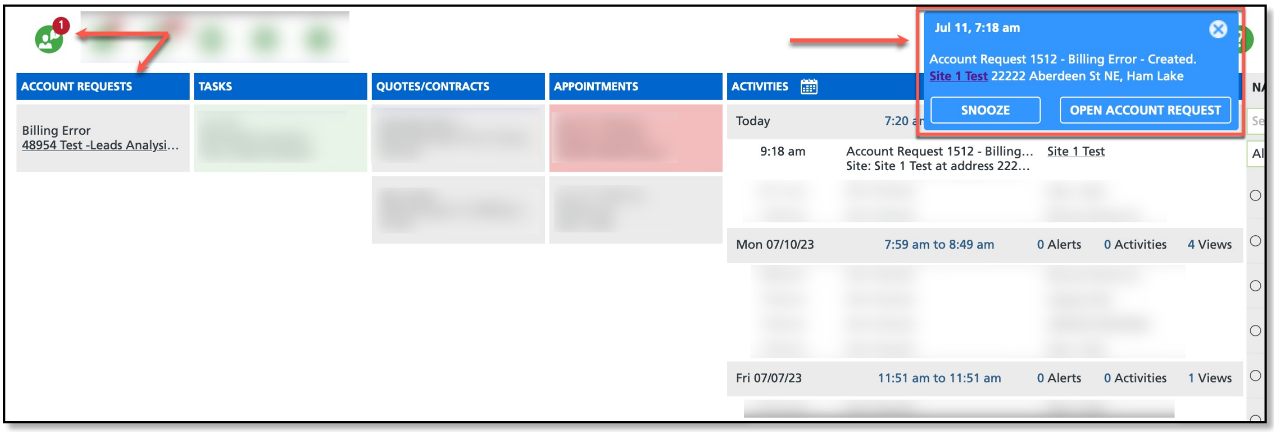
Linked Item Actions

Linked Item	Description
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.

User Notification of Assigned Requests

After a request is created and saved, the assigned user will receive a notification, and the request will appear in their Account Requests Home screen display.



Permissions

The following permissions are required to use the Add Account Request feature:

Permission ID	Permission Name
5	View Account
6	View Site
383	Add/Edit Account Request

Related Articles:

Account Request Management
Basic Navigation
Account Request Type Setup