

Account Request Type/Account Request Management - Department Field Added and Field Name Change (16681) [Enhancement]

Last Modified on 05/13/2024 3:42 pm EDT

The following changes have been applied to the Account Request Type Setup screen and Account Request Management screen:

Account Request Type

The following changes have been applied in Account Request Type Setup screen:

1. 'Assign to Default' has been renamed to 'Assign User By Default'
2. A 'Department' field has been added

EDIT ACCOUNT REQUEST TYPE

NAME: Please call me

TYPE: Other

ACTIVE: Yes

ALLOW SELF-SERVICE ORDERING: No

1 ASSIGN USER BY DEFAULT: Account Manager

2 DEPARTMENT: Admin

Pathway: Setup > Accounts > Account Request Type

Account Request Management

Within the Account Request Management screen, a Department filter option has been added to further limit what requests a user would like to see displayed on the screen.

ID	TYPE	ASSIGNED TO	DATE	ACCOUNT/ SITE	CONTACT	NOTE	STATUS
1501	Missed Pick Up	Lori Sheldt	Wed 04/23/25 01:04 pm	26521 LIBERTY COUNTY PRECINCT #3 / 26521001 LIBERTY COUNTY PRECINCT #3	LIBERTY COUNTY PRECINCT #3	reassigned b y Lori	Hold
1502	Customer Request	Lori Sheldt	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	added on portal	Open
1503	Customer Request	Lori Sheldt	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	added on portal	Open
1504	Customer Request	Lori Sheldt	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	on portal - 3rd time	Open
1505	Customer Request	Lori Sheldt	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	adding with me as salesperson	Open

Pathway: Accounts > Account Request Manager

