

Cancellation Request (Accounts) - Edit Cancellation Request Updates (17104) [New Feature]

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Two new tabs have been added to the Edit Cancellation Request screen:

1. A History tab has been added to track changes to cancellation requests, including updates to the assigned personnel and the current stage of the request.
2. A Linked Items tab has been added to the screen, enabling users to better manage cancellation requests by associating them with appointments, tasks, and notes.

The screenshot displays the 'EDIT CANCELLATION REQUEST' interface. The top navigation bar includes tabs for 'Details', 'Attachments', 'History', and 'Linked Items'. The 'History' tab is active, showing a table with columns: ID, NEW ASSIGNED TO, NEW STAGE, CREATED BY, CREATED ON, and NOTE. The table contains two rows of data.

ID	NEW ASSIGNED TO	NEW STAGE	CREATED BY	CREATED ON	NOTE
1020	Aliena Somers	Received	Isabel Navarro	8/21/24 11:24 am	1234
1019	Isabel Navarro	Received	Isabel Navarro	8/21/24 9:14 am	123

The 'Linked Items' tab is also shown, featuring a dropdown menu with options: 'Add Appointment', 'Add Note', 'Add Task', 'Link Appointment', 'Link Note', and 'Link Task'. Below the menu, a table lists linked items with columns for description, date, creator, and action. The table contains two rows.

Description	Date	Creator	Action
Send E-Mail	08/21/2024	Isabel Navarro	send email receipt
CANCEL NOTE	08/21/2024	Isabel Navarro	Do not send email

At the bottom of the interface, there are 'SAVE' and 'DELETE' buttons.

Pathway: Accounts > Search > Accounts