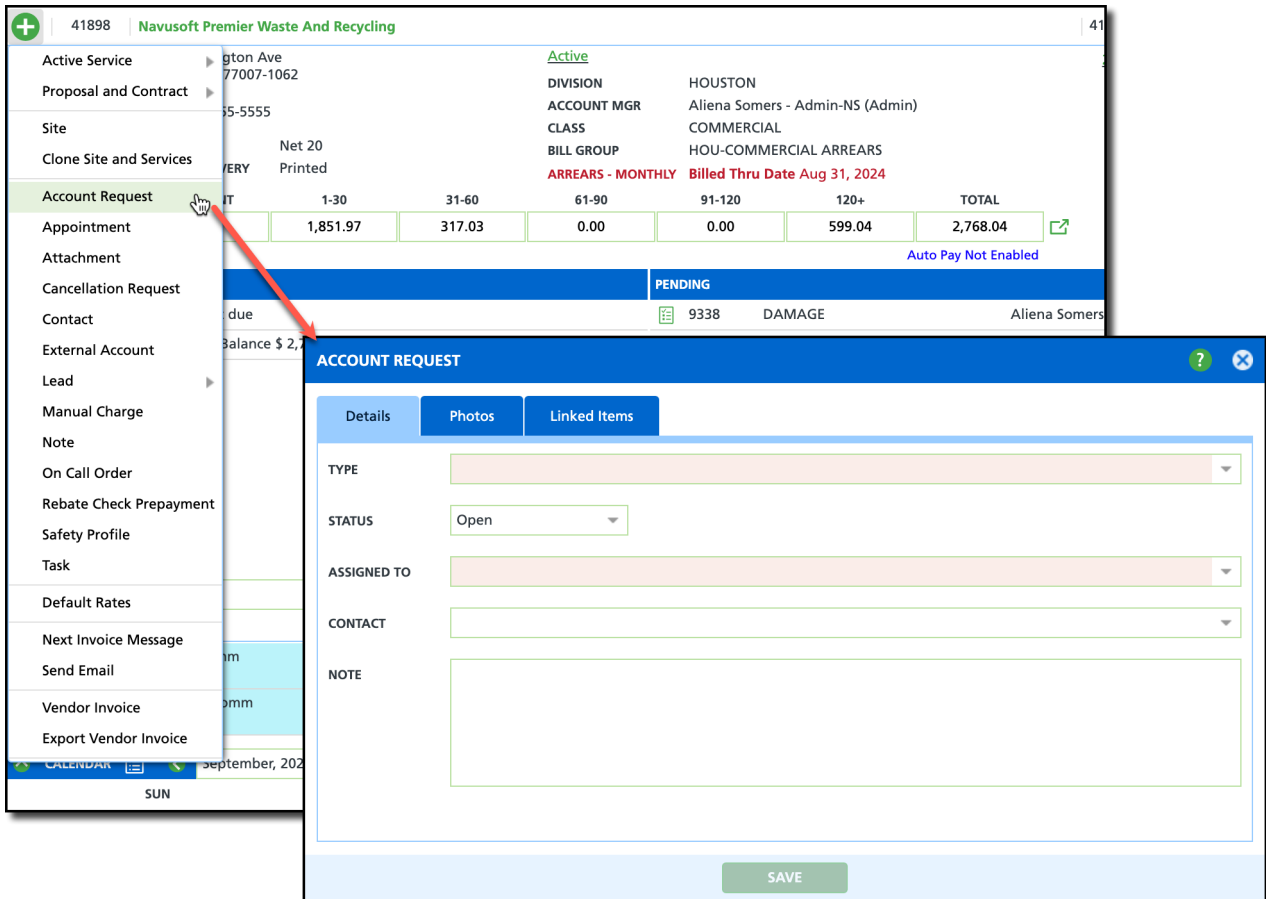


# Account Requests

Last Modified on 10/01/2024 9:57 am EDT

**Pathway:** [Accounts](#) > [Search](#) > [Accounts](#)

The Account Request tool allows users to create and manage action requests for specific accounts. 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.



## Permissions

The following permissions are required to create an account request:

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

## Create a Request

### Details Tab

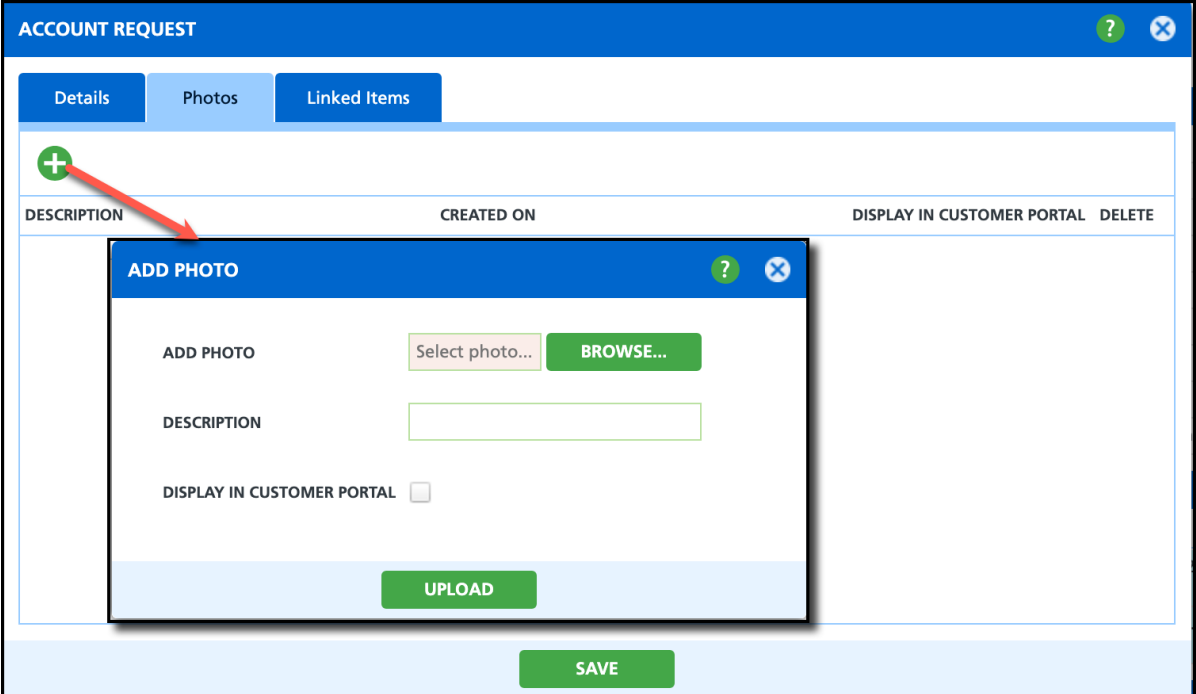
Use the Details tab to create and define the specifics of the request.

1. Search the account and open the one relevant to the request.
2. On the Customer Service screen, click on the Account Menu icon and select 'Account Request' from the list.
3. Complete the following *Required* fields:

- Select the request **Type**. This helps organize and filter the request after creation and will also appear as the request title.
  - Select the user to **assign** the request to. Once the request is created and saved, the assigned user will receive a system notification. You can change the user assignment in *Accounts > Account Request Management*.
4. Optional fields:
- If a status other than 'Open' applies, select it from the drop **Status** drop down.
  - Select a **Contact** for the account to specify who user's should contact regarding the request.
  - Enter a **Note** to provide further details regarding the request.
5. Click **Save** when finished.

## Photos Tab

Use the Photos tab to add relevant images to the request. Provide a brief description, and select 'Display in Customer Portal' if the photo should be visible to the customer.



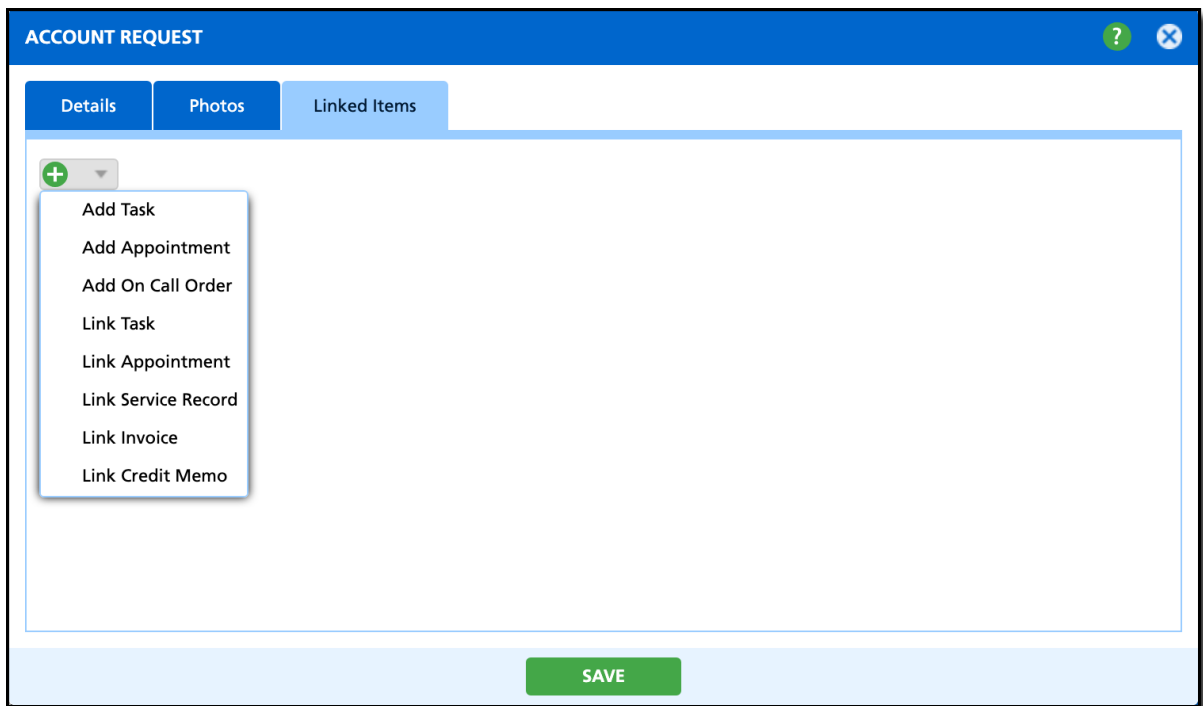
The screenshot displays the 'ACCOUNT REQUEST' interface with the 'Photos' tab selected. A modal window titled 'ADD PHOTO' is open, showing the following fields and controls:

- ADD PHOTO:** A text input field with a 'Select photo...' placeholder and a green 'BROWSE...' button.
- DESCRIPTION:** A text input field.
- DISPLAY IN CUSTOMER PORTAL:** A checkbox.
- UPLOAD:** A green button at the bottom of the modal.

The main interface shows a table with columns: DESCRIPTION, CREATED ON, DISPLAY IN CUSTOMER PORTAL, and DELETE. A red arrow points to a green plus icon in the top left corner of the Photos tab area.

## Linked Items Tab

Use the Linked Items tab to attach or associate relevant tasks, appointments, on-call orders, credit memos, service records, or invoices to the request for streamlined tracking and reference.



## Account Request Management

Pathway: [Accounts](#) > [Account Request Management](#)

After the account request has been created, the request will display in the Account Request Management screen to further track and manage. More information about the Account Request Management screen can be found here:

[Account Request Management](#)

ACCOUNT REQUEST MANAGEMENT							ACCOUNTS > ACCOUNT REQUEST MANAGEMENT	
DIVISION	DEPARTMENT	ASSIGNED TO	TYPE	STATUS				
All	All	All	All	Not Completed		Search		
ID	TYPE	ASSIGNED TO	DATE	ACCOUNT/ SITE	CONTACT	NOTE	STATUS	
1501	Missed Pick Up	Lydia Smith - Admin-NS (Admin)	Wed 04/23/25 01:04 pm	26521 LIBERTY COUNTY PRECINCT #3 / 26521001 LIBERTY COUNTY PRECINCT #3	LIBERTY COUNTY PRECINCT #3	reassigned by Lori	Hold	
1502	Customer Request	Lydia Smith - Admin-NS (Admin)	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	added on portal	Open	
1503	Customer Request	Lydia Smith - Admin-NS (Admin)	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	added on portal	Open	
1504	Customer Request	Lydia Smith - Admin-NS (Admin)	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	on portal - 3rd time	Open	
1505	Customer Request	Lydia Smith - Admin-NS (Admin)	Thu 05/04/23 06:05 am	48910 Liberty Hospital / 48910001 Liberty Site	Lori	adding with me as salespe...	Open	
1506	Missed Pick Up	Addison Green - CSR (Customer Service)	Wed 05/03/23 10:05 am	43662 COP-PUBLIC WORKS SERVICE / 43662001 COP-PUBLIC WORKS SERVICE			Open	
1507	Customer Request	House Account - House Account (Sales)	Tue 05/23/23 01:05 pm	20999 DEVEREAUX MATTHEW / 20999001 DEVEREAUX MATTHEW	matthew.van doren	Test	Open	
1508	Customer Request	House Acct non System - House Account (Sales)	Wed 06/21/23 11:06 am	26047 ANDREW GREEN / 26047001 ANDREW GREEN	Lori S	Added request on portal	Open	
1509	Customer Request	House Acct non System - House Account (Sales)	Wed 06/21/23 11:06 am	26047 ANDREW GREEN / 26047001 ANDREW GREEN	Lori S	adding 3 photos	Open	
1510	Please call me	Kendall Spencer - Software Engineer	Tue 06/27/23 12:06 pm	26521 LIBERTY COUNTY PRECINCT #3 / 26521001 LIBERTY COUNTY PRECINCT #3		these are notest	Open	
1511	Customer Request	House Acct non System - House Account (Sales)	Wed 07/05/23 11:07 am	41898 Navusoft Premier Waste And Recycling / 41898001 Navusoft - Demo	Matthew	test	Open	