Account Requests

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.
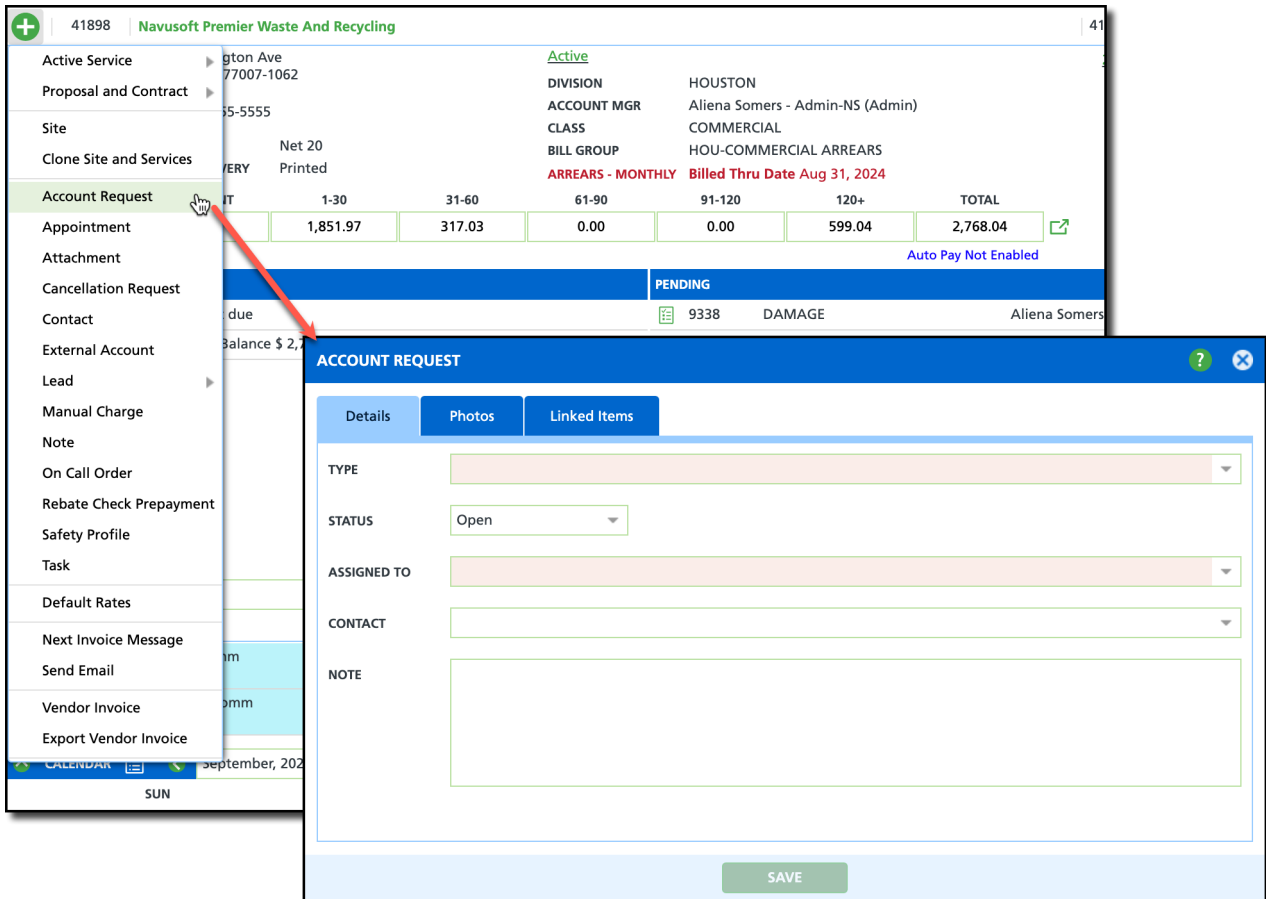
Permissions

The following permissions are required to create an account request:

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

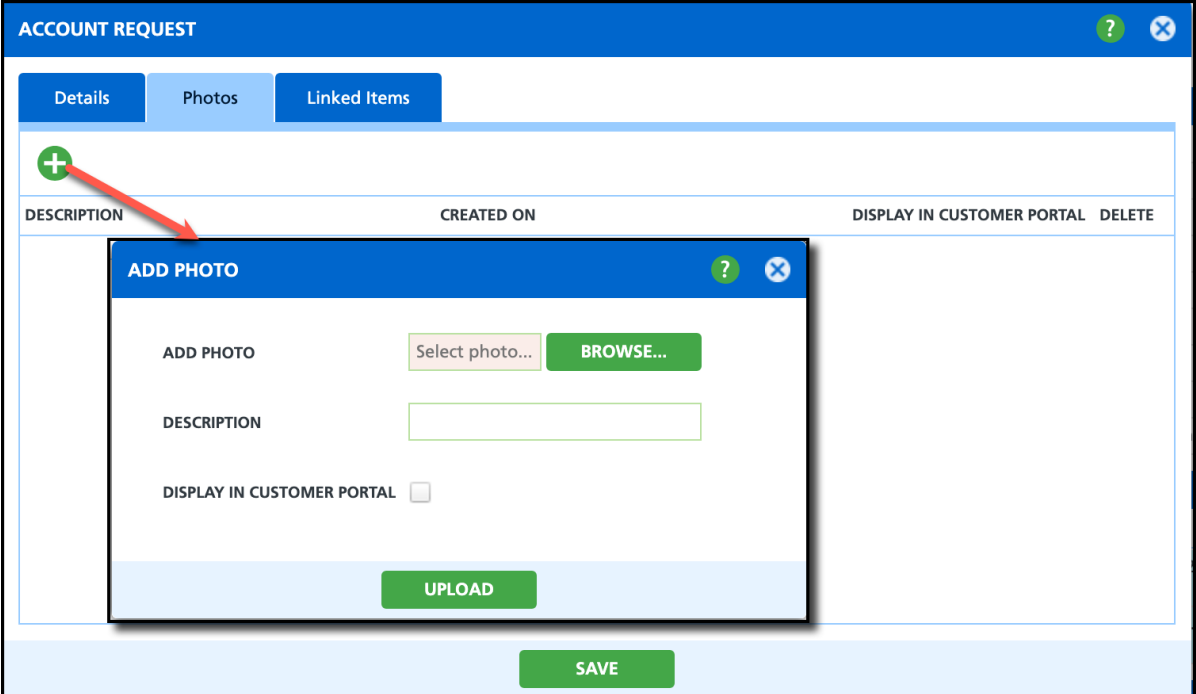# Create a Request

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.

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.
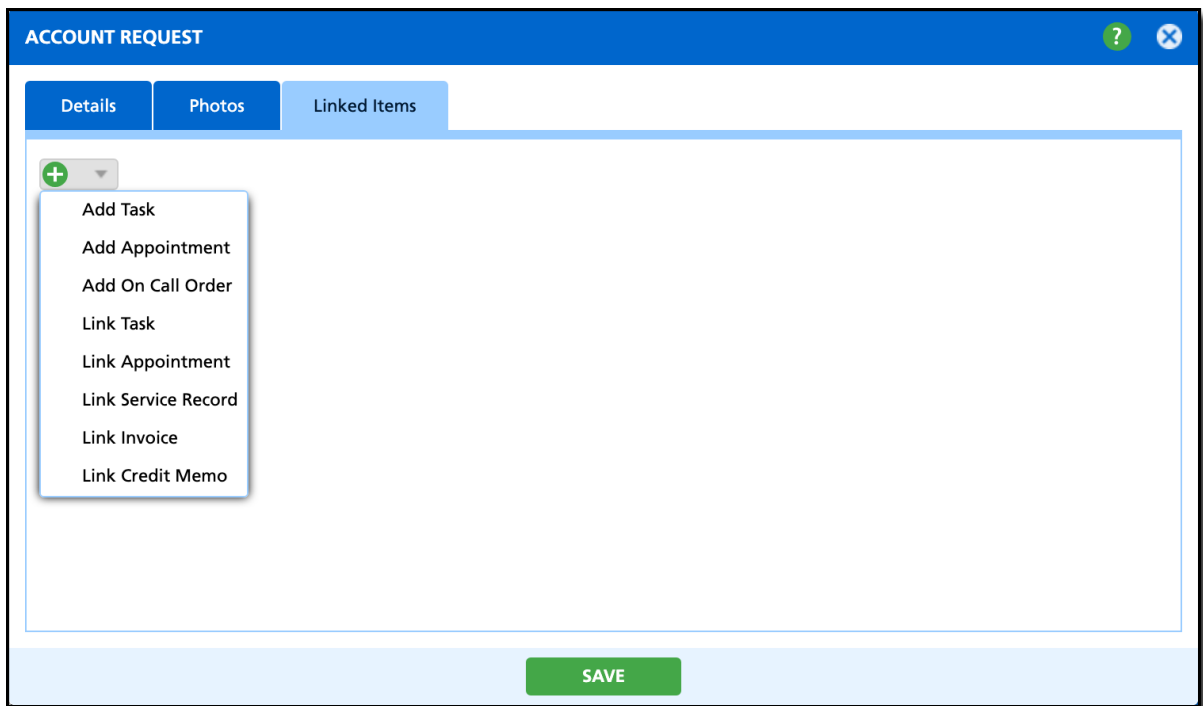
Account Request Management

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