Service Requests

User Guide

Submit, track, and manage service requests between
clients and providers — with threaded notes and status tracking.

Quick Reference

Access: Clients submit; managers review and assign
Status flow: Open → In Progress → Resolved → Closed
Notes: Threaded — both sides see the full conversation
Notifications: Automatic on status change and new notes

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1. Overview

Service requests are the communication channel between clients and providers. Clients submit requests from their portal. Managers see all requests on a dedicated page with status controls and tech assignment.

Every request has a full audit trail — who submitted it, when each status change happened, and every note in the thread.

2. Submitting a Request

Clients submit requests from the Client Portal. The form requires:

- Site — which location has the issue
- Subject — short summary (e.g., "Reader not responding")
- Details — full description of the problem
- Priority — normal or urgent

> Tip: Encourage clients to include specifics — which door, what time the issue started, and any error codes they see.

3. Managing Requests

Managers view all service requests in the portal's Requests page. For each request you can:

- Change the status (Open → In Progress → Resolved → Closed)
- Assign a tech from your team
- Add internal notes visible to the provider team
- Add client-visible notes that the client can see and respond to

Status changes and new notes trigger notifications to the relevant parties.

4. Threaded Notes

Each request has a threaded conversation. Both clients and providers can add notes. Notes are timestamped and attributed to the author.

This replaces back-and-forth phone calls and emails. The full history lives on the request — anyone on the team can read the context.

> Note: Clients see provider responses. Managers see client feedback. Both sides stay in sync without separate communication channels.

5. Quick Reference

Submit request	Client Portal > Requests > New Request
View requests	Manager Portal > Requests
Change status	Open request > Status dropdown
Assign tech	Open request > Assign dropdown
Add note	Open request > type note > Send