Client Requests: What do the buttons in Client Schedule Requests do?

In the Request editor that opens up when you click on a client request on the Home page has several buttons. Here is what they do.

When a client request comes in, it appears in the client request list on the Home page. It remains there until it is resolved (that is, until you accept the request or decline it). For requests that do not demand any action on your part, they can be removed from the list by marking them resolved.

The **Make Changes** and **Resolve and Save** buttons do the same thing. They save the requested changes to the client profile, mark the request resolved, and offer a client email composer.

The **Decline Request** button makes none of the requested changes, marks the request resolved, and offers an email composer so you can write to the client.

The **Save As-Is** button makes none of the requested changes, leaves the request unresolved (or resolved, whichever state it is in), but it saves any changes made to the Office Notes.

Unique solution ID: #1002
Author: Matt L
Last update: 2020-02-19 14:30

(c) 2020 LeashTime <support@leashtime.com> | 2020-10-20 20:01

URL: https://leashtime.com/phpmyfaq-2.7.5/index.php?action=artikel&cat=4&id=3&artlang=en