

Partner Portal- Action Tab

In the Action tab, you can view all actions for your program. The action tab includes any maintenance alarms that require follow up with the subscriber such as low battery and hardware/software failures and it includes cancellation requests that have been submitted.

Action #	Name	Type	Status	Site Name	Create Date	Due Date	Complete Date	Phone	Comment	Actions
100003309	Portal Cancellation	Accounting	Open	Sumtestelevis Sumtestelevis	05-08-2024	05-08-2024	—	5088111001	Need to recover Equipment from Subscriber. Contact Suman	
100003274	Portal Cancellation	Accounting	Open	CancelEvan Test	04-22-2024	04-22-2024	—	5085554444	Sub cannot afford	
100003267	Portal Cancellation	Accounting	Open	Marti Test 12	04-17-2024	04-17-2024	—	9848736788	Test cancellation	
100003265	HW SW Failure	Maintenance	Open	Alyse B2B Testing	04-16-2024	04-16-2024	—	5089981206	S/W Failure	
100003020	Program Communication	Data Quality	Closed	Alyse B2B Testing	02-28-2024	02-28-2024	05-02-2024	5089981206	Please reach out to Alyse @ 5089981206, has questions about invoice.	
100003016	Fail Detector Replacement	Maintenance	Closed	Alyse B2B Testing	02-28-2024	02-28-2024	04-18-2024	5089981206	Low Battery- AHB	
100003016	HW SW Failure	Maintenance	Closed	Alyse B2B Testing	02-28-2024	02-28-2024	04-18-2024	5089981206	S/W Failure	
100002226	Program Communication	Data Quality	Closed	HealthCare Services # 11200	01-18-2024	01-18-2024	01-18-2024	5085551234	Please update protocol, unable to call notifies on every signal.	
100000958	Program Communication	Data Quality	Closed	HealthCare Services # 11200	01-15-2024	01-15-2024	03-21-2024	5085551234	Please update address to valid address 111 Lawrence St Framingham MA 01902	

Section	Detail
1	<p>Actions – actions are a request for some type of activity to be completed on a specific site and cancelations that have been entered in the Partner Portal.</p> <p>Columns in the list</p> <p>Action # – the action number assigned from the CRM</p> <p>Name – type of action</p> <p>Type – category of action</p> <p>Created Date – date the action was created</p> <p>Completed Date – date the action was closed</p> <p>Phone number – contact phone number</p> <p>Comment – message to convey call to action</p> <p>Actions – hover over to see view option, click view to see the details of the action</p>

Action Details – summarizes the action request.

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Action #	Create Date
100003018	02-28-2024
Status	Due Date
Open	02-28-2024
Name	Complete Date
HW SW Failure	MM-dd-yyyy
Type	Site Name
Maintenance	Alyse B2BTesting
Comment	
S/W Failure	
Close action	

Action details covers all of the same information and is presented in the list view with a couple of additions
Site Name – provides an option to access the site
Close action – Maintenance Alarms - once the action is completed it should be closed, which will update the completed date

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Maintenance Alarm Actions

The following will appear as a replacement action in the Action tab:

- Fall Detector Replacement
- PHB Replacement
- HW SW Failure

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Portal Cancellation Actions

After a cancellation request is submitted for a given *Site*, a related *Portal Cancellation* action will be created in the Action tab

- Cancellations will remove inventory from the requested Site so it can be deployed again
- A cancellation will be finalized by a Lifeline representative and the related action will be closed

Action #	Create Date
100003274	04-22-2024
Status	Due Date
Open	04-22-2024
Name	Complete Date
Portal Cancellation	MM-dd-yyyy
Type	Site Name
Accounting	CancelEvan Test
Cancel Reason	EFFECTIVE_DATE
Too expensive	2024-04-22
Status	Name
Recovered	Lifeline 200
Comment	
Sub cannot afford	
Close action	

