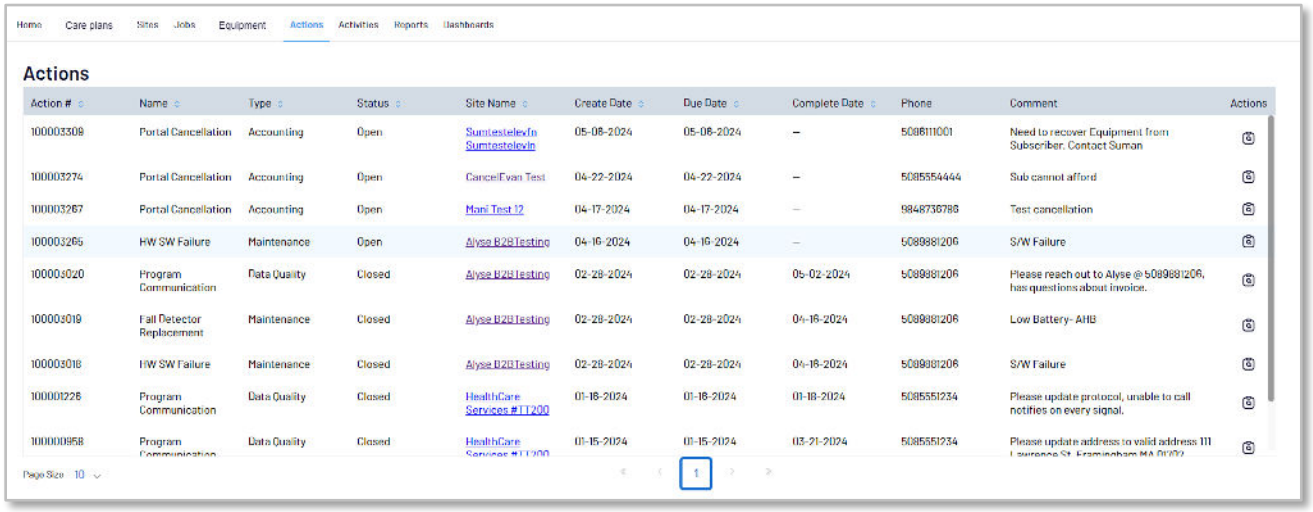
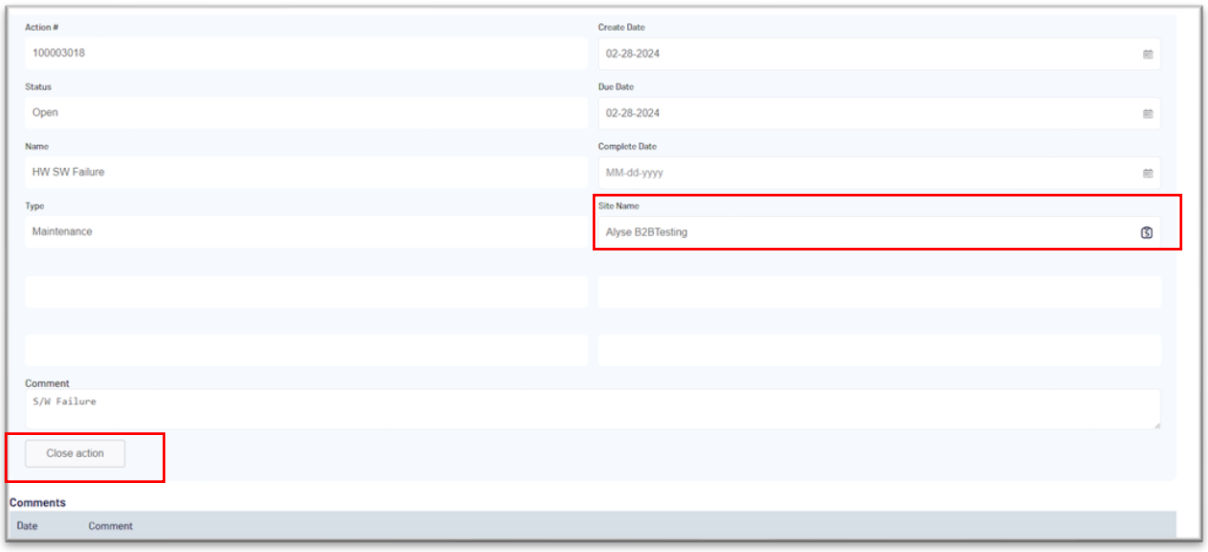
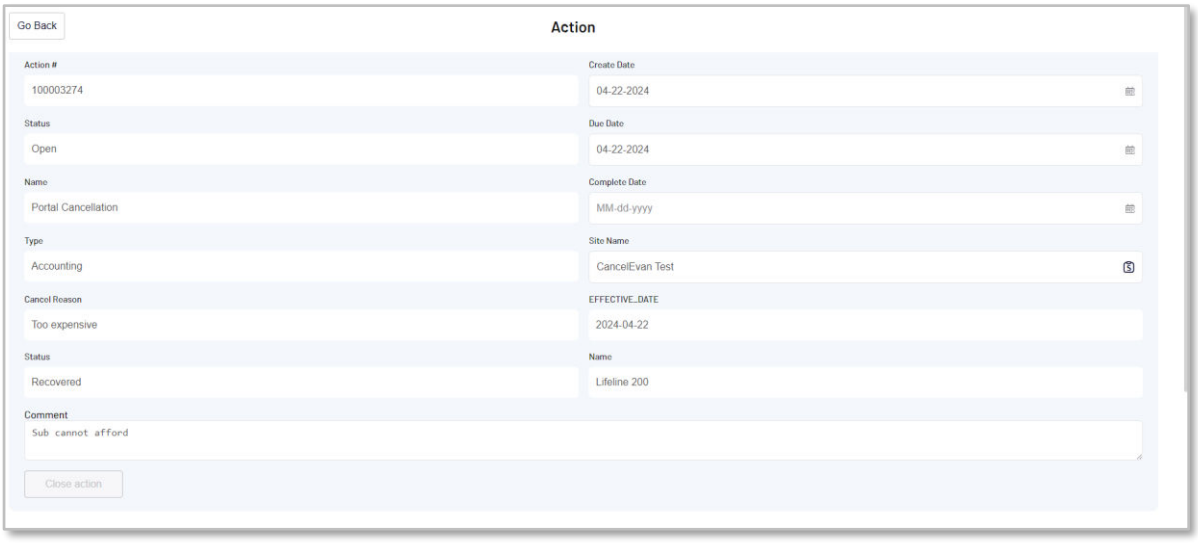
Partner Portal- Action Tab

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 cancelation requests that have been submitted.



Section	Detail
1	**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. **Columns in the list** Action # – the action number assigned from the CRM Name – type of action Type – category of action Created Date – date the action was created Completed Date – date the action was closed Phone number – contact phone number Comment – message to convey call to action Actions – hover over to see view option, click view to see the details of the action

2	**Action Details –** summarizes the action request.  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
3	**Maintenance Alarm Actions** The following will appear as a replacement action in the Action tab: • Fall Detector Replacement • PHB Replacement • HW SW Failure
4	**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