

1. Requests: Overview

The **Requests** module centralizes all client-initiated actions—support tickets, callback requests, document submissions, feature requests, and more—ensuring every interaction is tracked, assigned, and resolved in context. Key features include:

1. **Project & Client Association**

Every request is tied to a specific Project and Client record, so you always know who asked and under which business line or website.

2. **Desks & Queues**

Route requests into different Desks (e.g., Support, KYC, IT) for specialized teams to pick up.

3. **Status & Priority**

Track request lifecycles (New, In Progress, Waiting on Client, Closed) and set priority levels (Low, Normal, High, Urgent).

4. **Messaging Thread**

Communicate back and forth within each request via the built-in Messages feature, preserving a full audit trail.

5. **Attachments & Metadata**

Clients (or staff) can upload files—screenshots, documents, logs—and custom fields capture key details (e.g., account numbers, incident times).

6. **SLA & Escalations**

Monitor response and resolution times, escalate overdue requests automatically, and generate reports for continuous improvement.

The following actions are available in the **Requests** module:

1. [Creation](#)
2. [Editing](#)
3. [Filtering and Searching](#)

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