2. Requests: Use Cases

Use Case #1: Managing Service Inquiries

Your consulting firm's website has a "Request a Consultation" form. When a prospect fills it out, a new Request is created, automatically linked to their Client profile (or created anew). All attachments—project briefs, budgets, previous correspondence—are stored in that Request's thread, so sales and delivery teams can efficiently follow up.

Use Case #2: Ticket System for Customer Support

Treat each support ticket as a Request. Assign tickets to your Support Desk, set priorities (e.g., "Urgent – System Down"), and use the Messages feature to ask for details or provide status updates. The SLA dashboard flags aging tickets, ensuring no issue falls through the cracks.

Use Case #3: Handling Client Feedback and Suggestions

After onboarding or delivery, invite clients to submit feedback through the portal. Each piece of feedback becomes a Request—categorized (UI suggestion, process improvement, bug report), tagged for review by Product, and tracked through to implementation or response.

Use Case #4: KYC/AML Documentation Submission

Use Requests to collect Know-Your-Customer (KYC) documents. A client uploads passports, utility bills, or corporate documents as attachments. The AML Desk can then verify, request additional pages, and set the Request's status to "Compliance Approved" once complete—maintaining a full audit log for regulators.

Use Case #5: Account Modification & Feature Requests

Clients often need changes to their account settings—new user invitations, permission tweaks, or portal feature requests. Each change request is handled through the Requests module: assigned to the IT or Product Desk, prioritized, and communicated back to the client with progress updates until completion.

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