3. How to Create a Request

The **Requests** module is your single pane of glass for all client-initiated actions—support tickets, callback bookings, document uploads, feedback submissions, and more. Each request is automatically tied to a specific **Client** and **Project**, ensuring that nothing falls through the cracks. By using Requests you gain:

1. **Centralized Tracking:** Every inquiry lives in one list with clear status indicators (Active, Archived).
2. **Structured Context:** Attach files, set time windows, and capture custom data so your team has everything they need.
3. **Accountability & Audit:** Who opened, who owns, when it was created—and a complete message thread for full transparency.

Below is a step-by-step guide to **creating** and **viewing** requests in the system.

1. Open the Requests Module: From the left-hand nav, click **Requests**. The main Requests list shows total count, filters, search, and the table of existing requests.

2. Launch the "Add Request" Form: Click the **+ Add Request** button in the top-right corner.

3. Complete the General Section
Fill in each field as follows:

Field	Description
Name	Descriptive title (e.g., "Network Outage" or "Schedule Callback").
UID	System-generated unique ID (auto-increment).
Time range	(Optional) Select start/end dates to indicate when the request is valid or when the client is available.
Client	Pick the client from the dropdown. This cannot be changed after saving.
Project	Choose the project context (e.g., "Web Portal Support").
Description	Free-text details provided by the client or added by you for internal context

> **Note**: Once saved, you cannot change the client of the request.

4. Add Custom Data (Additional Information): Use the **Additional information** JSON tree to set any structured fields (e.g., `priority: "high"`, `documentType: "KYC"`). This is ideal for downstream automation or reporting.

5. Attach Supporting Files: Drag-drop or click **Browse** under **Attached file(s)** to upload screenshots, logs, or PDFs. Valid formats: JPG, PNG, PDF.

6. Save the Request:
When ready, click **Save** at the bottom of the panel.
The panel closes and your new request appears at the top of the Requests list with **Status = Active**.
To view information about created requests, go to the **Requests** tab and click on the name of the specific request. A drawer will appear with information about it:

Viewing & Managing a Request

Open a Request: Click any request's **Name** in the list.
Inspect Details: A **Request information** drawer opens on the right, displaying:

1. General fields (Name, Time range, Client, Description)
2. Status badge (Active, Archived)
3. Attached files and any custom data
4. Full message thread and metadata

Conclusion

By leveraging the Requests module you ensure that every client touchpoint is:

1. **Logged:** No more lost emails or ad-hoc notes.
2. **Linked:** Always tied to the right client and project for clear ownership.
3. **Transparent:** Full audit trail and effortless status tracking.

This standardized process boosts team efficiency, improves response times, and elevates client satisfaction across all service lines

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