

Partner Portal- Action Tab

In the Action tab, you can view all actions for your program. Actions are a request for some type of activity to be taken to support the site. The action tab includes any maintenance alarms that require follow up with the subscriber such as low battery and hardware/software failures.

Action #	Name	Type	Status	Site Name	Create Date	Due Date	Complete Date	Phone	Comment	Actions
100003020	Program Communication	Data Quality	Open	Alyse B2BTesting	02-28-2024	02-28-2024	—	5089881206	Please reach out to Alyse @ 5089881206, has questions about invoice.	
100003019	Fail Detector Replacement	Maintenance	Open	Alyse B2BTesting	02-28-2024	02-28-2024	—	5089881206	Low Battery- AHB	
100003018	HW SW Failure	Maintenance	Open	Alyse B2BTesting	02-28-2024	02-28-2024	—	5089881206	S/W Failure	
100001226	Program Communication	Data Quality	Closed	HealthCare Services #11200	01-16-2024	01-16-2024	01-18-2024	5085551234	Please update protocol, unable to call notifies on every signal.	
100000958	Program Communication	Data Quality	Open	HealthCare Services #11200	01-15-2024	01-15-2024	—	5085551234	Please update address to valid address 111 Lawrence St, Framingham MA 01702	
100000940	Program Communication	Data Quality	Open	Alyse B2BTesting	01-15-2024	01-15-2024	—	5089881206	Please reach out to Alyse @ 5085559874 to swap from 906FD to 906 PHB.	

Section	Detail
1	<p>Actions – actions are a request for some type of activity to be completed on a specific site.</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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The screenshot displays a form for 'Action Details'. The fields are as follows:

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

At the bottom left of the form, there is a button labeled 'Close action'. At the bottom right, there is a 'Comments' section with a table header containing 'Date' and 'Comment'.

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 – once the action is completed it can 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