

Customer Search/Contact Entry

Background

The Customer Search/Contact Entry feature enables agencies to collect customer information and track all incoming and outgoing customer contact for the purpose of streamlining subsequent tasks. The purpose of the Contact Entry feature is to assist in maintaining a contact history log, generate callbacks, and automate document mail-outs to customers. The system is designed to take a minimum of initial information to facilitate efficient and effective response to those seeking assistance or information.

How It Works

1. Customer Search/Contact Entry in ServTraq

Open the *Contacts* tab and click **Customer Search/Contact Entry**. Search for the customer using any or all of the contact information provided and click **submit**.

Customer Search/Incoming Contact Entry

Search Parameters

Name: JULIE GARCIA

Social Security Number: _____

Home Phone: 831 9876543

Date of Birth: _____

Mailing Address: _____

Mail Zip/City: _____

Submit Clear

New Customer Edit Customer Refresh List Export List

First Name	Last Name	SSN	Date of Birth	Mailing Address
JULIA	GARCIA	767676761	7/13/1988	000 BERRY

2. Customer Record

If a match is found, click on the customer's first **name-link** to open the customer record. Make any updates to the contact information if necessary and add a **contact entry note**.

If a match is not found, click **New Customer**, the information entered during the search will populate into the customer record. Click **Save** to create the customer record. Proceed to add a **contact entry note**.

3. Contact Entry Note

A *Contact Entry Note* is made to track **incoming** or **outgoing** contact with customers as well as streamline other related tasks; such as, Callbacks ¹and Mail-Outs². Contact entries logged are visible to all staff to assist to respond or resolve customer inquiries.

Scroll to the **Contacts** section within the *customer record*. Click the **addition** icon and enter the fields listed in the table below. Click the **floppy disk** icon to save the entry.

Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
2/21/2014 11:54:19 AM	INCOMING	APPLICATION REQUESTED	APPLICATION REQUEST	ENGLISH		AP - FIRST TIME(HEAP APPLICATION) WITH INSTRUCT	
2/4/2014	INCOMING	PROGRAM/APPLICATION INFO GIVEN	CALL BACK REQUESTED	ENGLISH	PPT20		

Entry Field	Description
Contact Date	Defaults to the current date and time
Contact Type	Incoming -Customer initiates contact with the agency Outgoing -Agency initiates contact with the customer
Contact Action	The Contact Action entered describes what took place in the call. Select the most appropriate reason.
Call Code	Select the Call Code that best fits the situation. Callbacks can be generated from the <i>code</i> selected.
Language	The language code selected will also appear on the Envelopes/Labels from Contacts report*.
Mailing Code	The Mail Code identifies the type of document to be mailed-out to the customer such as notices or applications. Mailing codes and descriptions can be modified to fit your agency's needs.
A complete list of the Call Codes, Contact Action Codes, and Mail Codes can be found in Appendix A of the ServTraQ Manual.	

3.1. Examples

The examples below demonstrate the most common **incoming** contact logged. You are not restricted to only using the combinations in the examples below; a complete list of *Contact Actions*, *Call Codes*, and *Mailing Codes* is available in Appendix A of the ServTraQ Manual.

1. Customer is Requesting an Application



¹ Adds a customer's contact information to a Callbacks list in ServTraQ for the purpose of returning calls.

² Generates a mail-out envelope or label with the customer's information for streamlining document mail-outs.

- a. Mailing Code selected identifies the type of application to mail out to the customer. The mailing code generates an envelope with the customer information to quickly insert an application/notification to mail it out.

Contacts

Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
Contact Date	1/24/2014 9:26:28 AM	Contact Type	INCOMING				
Contact Action	APPLICATION REQUESTED	Call Code	APPLICATION REQUEST				
Language	ENGLISH	Notes					
Mailing Code	AP - FIRST TIME(HEAP APPLICATION) WITH INSTR						

2. Agency Tracks Receipt of Heap Application

- a. Agencies can also track the receipt of a HEAP application to automate notification mail outs. This contact entry can be automated with the use of Barcoded Applications (ServTraq Supported).

Contact Date: 12/9/2015 4:43:18 PM

Contact Action: HEAP APPLICATION RECEIVED



Language: ENGLISH

Mailing Code: NL - WRITTEN NOTIFICATION LETTER

Contact Type: INCOMING

Call Code: NO ACTION REQ - RECORD ONLY

Notes:



 

3. Customer wants an Update on their Status

The *call code* in this example will place the customer in the **Callbacks** list in ServTraq. Use a call code of "No Action Required- Record Only" to avoid adding the record to the list.

Contacts

Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
Contact Date	2/3/2014 9:17:47 AM	Contact Type	INCOMING				
Contact Action	STATUS - MAILED APP REQUEST	Call Code	STATUS REQUEST				
Language	ENGLISH	Notes					
Mailing Code							



 

4. Customer has a 48 Hour Shut-Off Notice

The *call code* in this example will place the customer in the **Callbacks** list in ServTraq. Use a call code of “No Action Required- Record Only” to avoid adding the record to the list.

Contacts

Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
Contact Date: 1/24/2014 12:20:16 PM	Contact Type: INCOMING	Contact Action: EMERGENCY CALL FROM CUSTOMER	Call Code: 48 HR NOTICE REC'D	Language: ENGLISH	Notes:	Mailing Code: AP - FIRST TIME(HEAP APPLICATION) WITH INS'	Mailing Date:



5. Deficient Application

The *contact action*, “Deficient Application Process” will allow you to enter application deficiency reasons using the arrow to the left of the saved contact. If the deficiency can be resolved over the phone, you can use the *call code* “Deficient Phone Back” to place the customer on the **Callbacks** list.

Contacts



Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
10/14/2015	OUTGOING	DEFICIENT APPLICATION PROCESS	DEFICIENT PHONE BACK	ENGLISH			

Contact Date: 10/14/2015 1:37:59 PM
 Contact Type: OUTGOING
 Contact Action: DEFICIENT APPLICATION PROCESS
 Call Code: DEFICIENT PHONE BACK
 Language: ENGLISH
 Notes:
 Mailing Code:








Deficiencies

Deficiency Reason	Deficiency Notes
Deficiency Reason:* SSN MISSING/ILLEGIBLE	Deficiency Notes: NEED SSN






If the deficiency cannot be resolved over the phone, using a mailing code of “IM – Deficient (Incomplete)” will generate an addressed envelope, or mailing label, to mail the application back for corrections or more documentation.

Contacts									
	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date	
▼	10/14/2015	OUTGOING	DEFICIENT APPLICATION PROCESS	DEFICIENT PHONE BACK	ENGLISH				
<div> <div> Contact Date: 10/14/2015 1:37:59 PM Contact Action: DEFICIENT APPLICATION PROCESS Language: ENGLISH Mailing Code: IM - DEFICIENT (INCOMPLETE) </div> <div> Contact Type: OUTGOING Call Code: NO ACTION REQ - RECORD ONLY Notes: </div> </div> <div>   </div>									
Deficiencies									
Deficiency Reason					Deficiency Notes				
Deficiency Reason: IV MISSING					Deficiency Notes: NO IV SENT				
<div>   </div>									

6. Weatherization Calls


Add Weatherization calls to the Callbacks list by adding a contact entry code using the *contact action* “Wx Information Requested” and the *call code* “Wx Call – Info/Sched/Job.” The “Wx Call” call code will easily identify which calls the Weatherization department needs to respond to.

Contacts									
	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date	
	10/12/2015	INCOMING	WX INFORMATION REQUESTED	WX CALL - INFO/SCHED/JOB	ENGLISH				
<div> <div> Contact Date: 10/12/2015 3:28:08 PM Contact Action: WX INFORMATION REQUESTED Language: ENGLISH Mailing Code: </div> <div> Contact Type: INCOMING Call Code: WX CALL - INFO/SCHED/JOB Notes: </div> </div> <div>   </div>									

4. Adding Customers to the Callbacks List

The **Callbacks** list in ServTraq is created based on the *Call Code* selected upon logging a *contact entry note*. Customer information is displayed in the *Callbacks* screen when coded appropriately. To access the *Callbacks* list, go to Contacts: **Callbacks**.

The **Callbacks list** is prioritized according the time sensitivity, which means an emergency call is placed at the top of the list regardless of when the call was received. Calls are not specific to one employee, anyone available can contact the customer to respond to inquiries or resolve an issue.



Home	Customer Callbacks						
Contacts	View Customer Record Refresh Export						
Customer Search/Contact Entry	List Name	Call Code	Language	Phone	Contact Action	Notes	
Customer Contacts	ANGELICA VICTORIA	SR	SPANISH	831 5157154	STATUS - IN PERSON APP REQUEST	WILL BE SHUT OFF 2/3 SHE HAS A PROMISE TO PAY BY HEAP	
HEAP	M GUADALUPE DELREAL	SR	SPANISH	831 2690274	STATUS - MAILED APP REQUEST		
Weatherization	MARTINA CRUZ	SR	SPANISH	831 7711806	STATUS - MAILED APP REQUEST		
Inventory	ADELINA M RODRIGUEZ	SR	ENGLISH	831 5822501	STATUS - MAILED APP REQUEST		
Reports							

5. Clear a Callback

Click on the customer's first name, to open the customer record and log an outgoing **contact entry note** with a "Resolved" or "No Action Required- Record Only" call code to remove the customer from the list.

Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
Contact Date	1/22/2014 9:18:03 AM	Contact Type	OUTGOING	Contact Action	PROGRAM/APPLICATION INFO GIVEN	Call Code	RESOLVED
Language	ENGLISH	Notes					
Mailing Code							

Tips & Tricks

Duplicate Customer Records

Do not spend too much time trying to locate an existing customer record. At this stage, ServTraq allows duplicate records for speed of entry. Duplicate Customer Records can be merged together at a later time.

Envelopes/Labels for Document Mail-Outs

Based on the Contact Entry –Mailing Code selected, ServTraq can generate envelope/labels with the customer's name, address, language preference and mail code selected to streamline document mail-outs. See section 6 for more information.

CENTRAL COAST ENERGY SERVICES, INC.
PO BOX 2707
WATSONVILLE CA 95077-2707

Forms must be
mailed in English

E

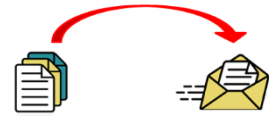
CP

Lupe Lopez
631 Broadway Apt 2
Gilroy, CA 95029

A full application
packet

- HEAP
- CARE
- WX

RETURN SERVICE REQUESTED



Additional Resources

Related Videos: <https://servtraq.freshdesk.com/solution/articles/4000047269>

- *Customer Search/Customer Record*
- *Track Customer Contact through a Contact Entry Note*
- *Clear a Callback*
- *Merging Customer Records*

ServTraq Manual: <http://ServTraq.com/Nimbus1.html>

ServTraq Support: Support@ServTraq.com