



# Contacts and Callbacks



# Contacts and Callbacks



- ▶ One place to track all communication
- ▶ Accessible to all, not specific to employee
- ▶ Integrated lists and reports



# What is considered customer contact?



## Outgoing Contact

Scheduling Call

Sent out Application

Deficient App. update

## Incoming Contact

Cancelled Appointment

Mailed back Application

Questions Regarding

Deficiency



POLL



# PROCESS

- ▶ Search for the customer
- ▶ Go to “Contacts”
- ▶ Add an *incoming* customer contact entry
  - ▶ Fields for various customer contact scenarios available for selection



# Scenario 1

**A customer submitted an incomplete application.**



# Step 1. Search for Customer



Home

Contacts

Incoming Application Processing

Customer Search/Contact Entry

Callbacks

Customer Contacts

HEAP

Weatherization

Inventory

Reports

Analytics

Administration



## Customer Search/Incoming Contact Entry

### Search Parameters

Name:	<input type="text" value="DOENA"/>	<input type="text" value="TEST"/>	
Social Security Number:	<input type="text" value="668-71-6854"/>		
Home Phone:	<input type="text" value="Area Code"/>	<input type="text" value="Phone Number"/>	
Date of Birth:	<input type="text"/>		
Mailing Address:	<input type="text" value="Street #"/>	<input type="text" value="Street Name"/>	<input type="text" value="Unit Number"/>
Mail Zip/City:	<input type="text" value="Zip Code"/>	<input type="text" value="City"/>	
<input type="button" value="Submit"/>		<input type="button" value="Clear"/>	



# Step 2. Go to Contacts

Sections

Customer Details

Mailing Address

Contact Information

**Contacts**

Household

Notes

Applications

Jobs

Intake Appointments

Audit/Change History

Related

CSD Change Requests

Files

Edit Customer

**TEST, DOENA - CustomerID#: 110395**

Customer Details

Name\*:

DOENA

TEST

First NameMILast Name

Social Security Number:

668-71-6854

Date of Birth:

1/1/1996

Ethnicity:

Primary EthnicityEthnicity Subcategory

Special Handling?: ☐ Alerts user to consult management prior to making any changes to the customer record

Mailing Address



# Step 3. Add Incoming Contact Entry

**Contacts**



	Contact Date ▼	Contact Type ▼	Contact Action ▼	Call Code ▼	Language ▼	Notes ▼	Mailing Code ▼	Mailing Date ▼	Entered By ▼
<div><div></div><div>No contacts exist for this customer</div></div>									
<a href="#">▼ Create Filter</a>									



# Step 3. Add Incoming Contact Entry (cont.)



## Contacts





Contact Date ▼	Contact Type ▼	Contact Action ▼	Call Code ▼	Language ▼	Notes ▼	Mailing Code ▼	Mailing Date ▼	Entered By ▼							
Contact Date:	1/10/2020 12:07:41 PM ▼	Contact Type:	INCOMING ▼	Contact Action:	DEFICIENT APPLICATION PROCESS ▼	Call Code:	DEFICIENT PHONE BACK ▼	Language:	▼	Notes:	▼	Mailing Code:	▼	Entered By:	AGENCY EMPLOYEE ▼
<div></div>															
<a href="#">▼ Create Filter</a>															




# Step 3. Add Incoming Contact Entry (cont.)



**Contacts**

	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
   	2/24/2020	INCOMING	DEFICIENT APPLICATION PROCESS	DEFICIENT PHONE BACK	ENGLISH			





**Deficiencies**

Deficiency Reason	Deficiency Notes
 No data to display	


[Create Filter](#)

For deficiencies, click the **drop down** button to **enter a reason**

**Contacts**

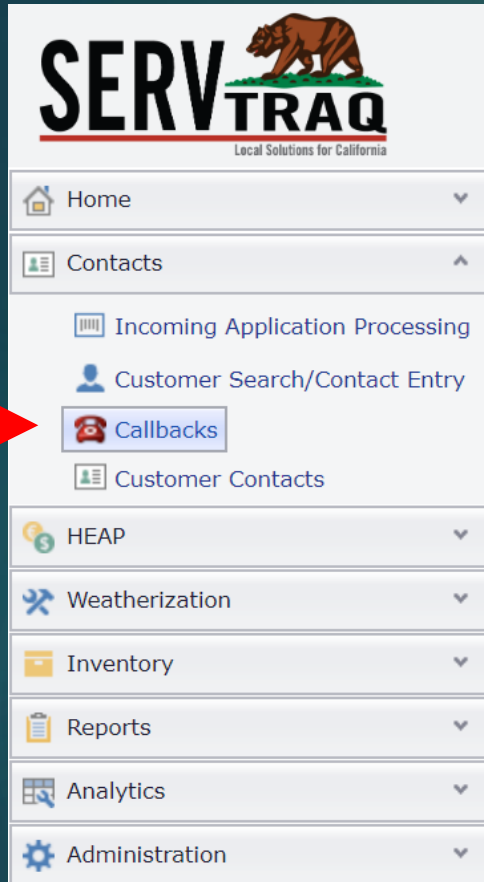
	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
   	2/24/2020	INCOMING	DEFICIENT APPLICATION PROCESS	DEFICIENT PHONE BACK	ENGLISH			

**Deficiencies**

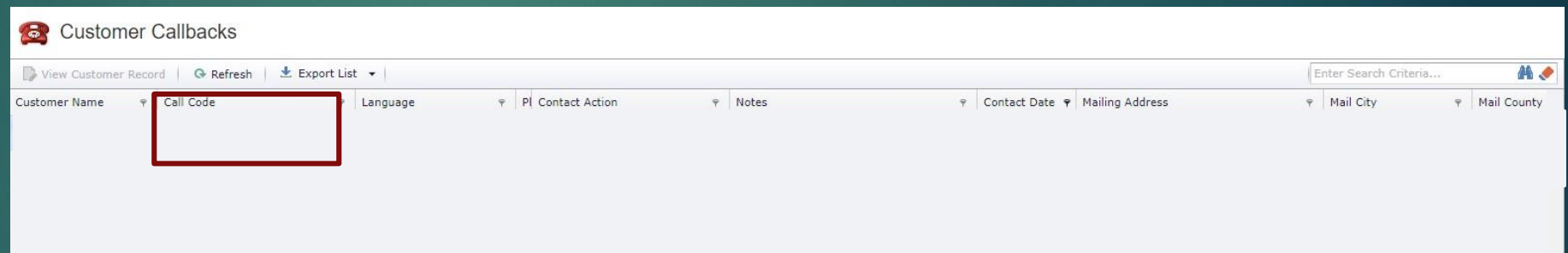
Deficiency Reason	Deficiency Notes
Deficiency Reason:* HH SIZE MISSING	 Deficiency Notes: NEED TO COLLECT HH INFO



# Callbacks List



► Callbacks are created based on the “Call Code” selected in the *Contact Entry Note*.



Customer Callbacks







View Customer Record | Refresh | Export List | Enter Search Criteria...

Customer Name	Call Code	Language	PI	Contact Action	Notes	Contact Date	Mailing Address	Mail City	Mail County
---------------	-----------	----------	----	----------------	-------	--------------	-----------------	-----------	-------------



# Step 4. Clear the Callback Add Outgoing Contact Entry







**Contacts**

		Contact Date ▼	Contact Type ▼	Contact Action ▼	Call Code ▼	Language ▼	Notes
▼	  	2/24/2020	INCOMING	DEFICIENT APPLICATION PROCESS	DEFICIENT PHONE BACK	ENGLISH	
<b>Deficiencies</b>							
			Deficiency Reason		Deficiency Notes		
  			HH SIZE MISSING		NEED TO COLLECT HH INFO		



# Step 4. Clear the Callback Add Outgoing Contact Entry (cont.)

## Contacts

	Contact Date ▼	Contact Type ▼	Contact Action ▼	Call Code ▼	Language ▼	Notes ▼	Mailing Code ▼	Mailing Date ▼	Entered By ▼						
Contact Date:	1/10/2020 12:33:22 PM ▼	Contact Type:	OUTGOING ▼	Contact Action:	CLEARED CALL-NO CALL OR ACTION ▼	Call Code:	NO ACTION REQ - RECORD ONLY ▼	Language:	▼	Notes:	▼	Mailing Code:	▼	Entered By:	AGENCY EMPLOYEE
<div> </div>															
   	1/10/2020	INCOMING	DEFICIENT APPLICATION PROCESS	DEFICIENT PHONE BACK	ENGLISH										AGENCY EMPLOYEE
<a href="#">▼ Create Filter</a>															





Customer Callbacks

View Customer Record

Refresh

Export List ▾

Customer Name	Call Code	Language	Phone	Contact Action	Notes	Contact Date	Mailing Address	Mail City	Mail County
---------------	-----------	----------	-------	----------------	-------	--------------	-----------------	-----------	-------------



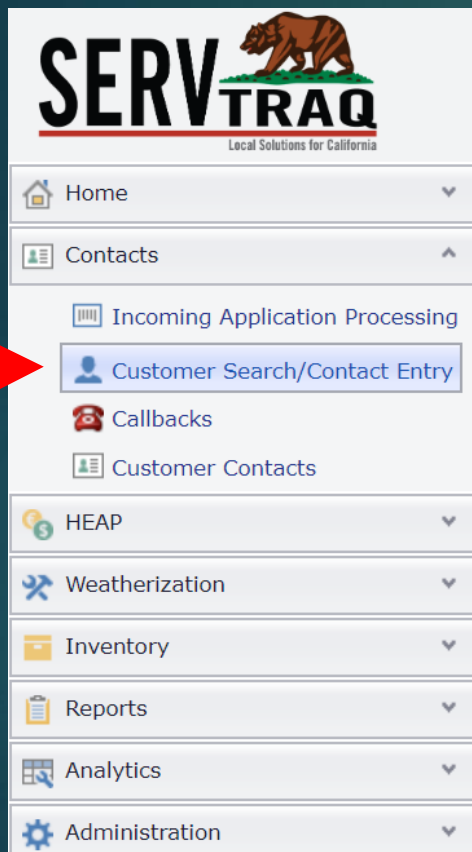
# Scenario 2



**A customer called to cancel  
their appointment**



# Step 1. Search for Customer



## Customer Search/Incoming Contact Entry

### Search Parameters

Name:	<input type="text" value="DOENA"/>	<input type="text" value="TEST"/>	
Social Security Number:	<input type="text" value="668-71-6854"/>		
Home Phone:	<input type="text" value="Area Code"/>	<input type="text" value="Phone Number"/>	
Date of Birth:	<input type="text"/>		
Mailing Address:	<input type="text" value="Street #"/>	<input type="text" value="Street Name"/>	<input type="text" value="Unit Number"/>
Mail Zip/City:	<input type="text" value="Zip Code"/>	<input type="text" value="City"/>	
<input type="button" value="Submit"/>		<input type="button" value="Clear"/>	



# Step 2. Go to Contacts

Sections

Customer Details

Mailing Address

Contact Information

**Contacts**

Household

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Audit/Change History

Related

CSD Change Requests

Files

Edit Customer

**TEST, DOENA - CustomerID#: 110395**

Customer Details

Name\*:

First NameMILast Name

Social Security Number:

Date of Birth:

Ethnicity:

Primary EthnicityEthnicity Subcategory

Special Handling?: ☐ Alerts user to consult management prior to making any changes to the customer record

Mailing Address



# Step 3. Add Incoming Contact Entry

**Contacts**

	Contact Date ▼	Contact Type ▼	Contact Action ▼	Call Code ▼	Language ▼	Notes ▼	Mailing Code ▼	Mailing Date ▼	Entered By ▼
<div><div></div><div>No contacts exist for this customer</div></div>									
<a href="#">▼ Create Filter</a>									



# Step 3. Add Incoming Contact Entry (cont.)



## Contacts

	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code
Contact Date:	2/25/2020 2:03:57 PM	Contact Type:	INCOMING	Call Code:	CALL BACK REQUESTED	Notes:	CUSTOMER CALLED TO SAY THEY COULDN'T DO IT TODAY
Contact Action:	RESCHEDULED APPOINTMENT	Entered By:	ADAM DEHOYOS				
Language:	ENGLISH						
Mailing Code:							



# Callbacks List



Home

Contacts

Incoming Application Processing

Customer Search/Contact Entry

Callbacks

Customer Contacts

HEAP

Weatherization

Inventory

Reports

Analytics

Administration

Customer Callbacks							
<div>View Customer Record   Refresh   Export List</div>							
Customer Name	Call Code	Language	Phone	Contact Action	Notes	Contact Date	Mailing Address
TODD MCPODD	CALL BACK REQUESTED	ENGLISH	(831) 111-1111	RESCHEDULED APPOINTMENT	CUSTOMER CALLED TO SAY THEY COULDN'T DO IT TODAY	2/26/2020	200 PODD ST





POLL



# Scenario 2 (continued)



## Rescheduling Call



# Add Outgoing Contact Entry (cont.)



Contact Date:	2/25/2020 2:32:16 PM	▼
Contact Action:	SCHEDULED APPOINTMENT	▼
Language:	ENGLISH	▼
Mailing Code:		▼

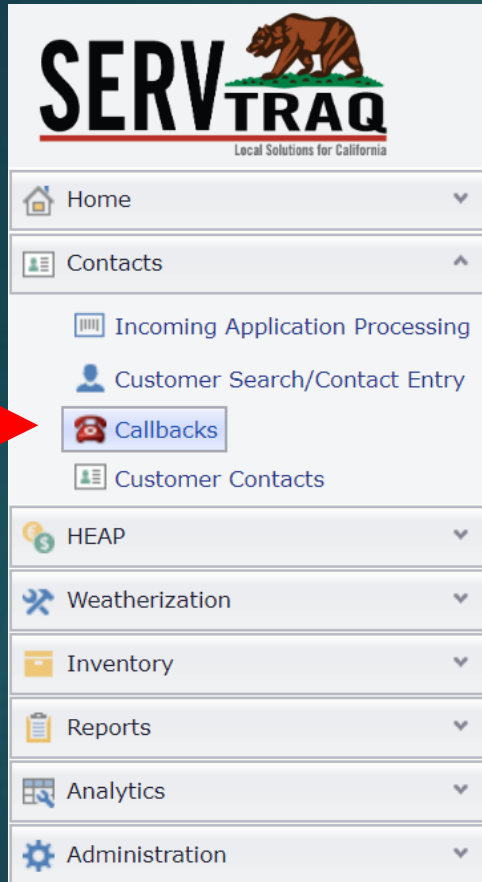
Contact Type:	OUTGOING
Call Code:	NO ACTION REQ - RECORD ONLY
Notes:	
Entered By:	ADAM DEHOYOS



# Callbacks List



- ▶ Callbacks are removed from the list based on the “Contact Action” and “Call Code” selected in the *Contact Entry Note*

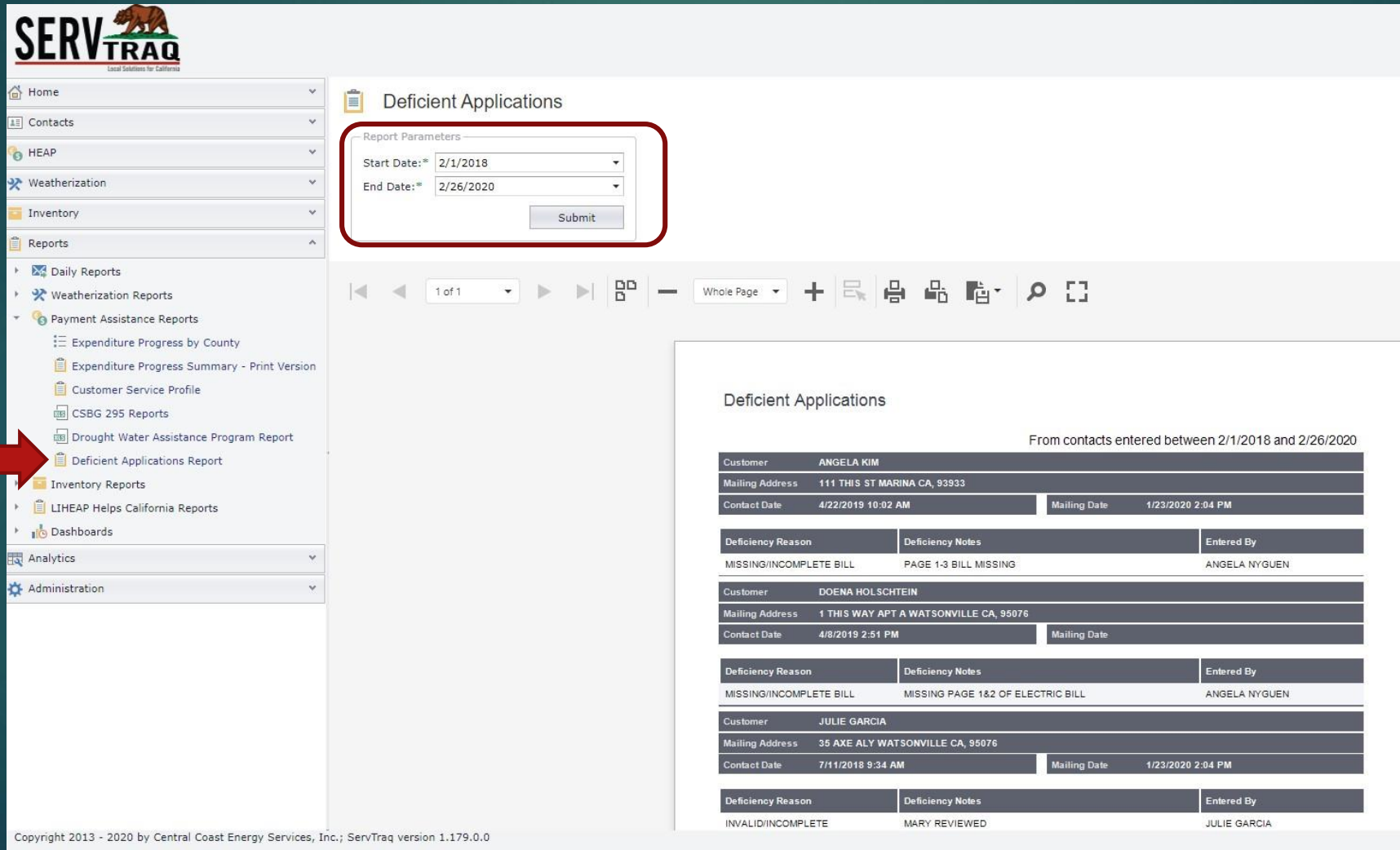


Customer Callbacks							
<a href="#">View Customer Record</a>   <a href="#">Refresh</a>   <a href="#">Export List</a>							
Customer Name	Call Code	Language	Phone	Contact Action	Notes	Contact Date	Mailing Address
TODD MCPODD	CALL BACK REQUESTED	ENGLISH	(831) 111-1111	RESCHEDULED APPOINTMENT	CUSTOMER CALLED TO SAY THEY COULDN'T DO IT TODAY	2/26/2020	200 PODD ST



# Deficiency Report

You can track deficient applications in the new “Deficient Applications Report”



The screenshot displays the SERV TRAQ web application interface. On the left is a navigation menu with categories like Home, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. A red arrow points to the 'Deficient Applications Report' link under the Reports section. The main content area is titled 'Deficient Applications' and features a 'Report Parameters' box with 'Start Date' set to 2/1/2018 and 'End Date' set to 2/26/2020. Below this is a table of deficient applications. The table includes columns for Customer, Mailing Address, Contact Date, Mailing Date, Deficiency Reason, Deficiency Notes, and Entered By. The data is filtered to show applications from contacts entered between 2/1/2018 and 2/26/2020.

Customer	Mailing Address	Contact Date	Mailing Date	Deficiency Reason	Deficiency Notes	Entered By
ANGELA KIM	111 THIS ST MARINA CA, 93933	4/22/2019 10:02 AM	1/23/2020 2:04 PM	MISSING/INCOMPLETE BILL	PAGE 1-3 BILL MISSING	ANGELA NYGUEN
DOENA HOLSCHTEIN	1 THIS WAY APT A WATSONVILLE CA, 95076	4/8/2019 2:51 PM		MISSING/INCOMPLETE BILL	MISSING PAGE 1&2 OF ELECTRIC BILL	ANGELA NYGUEN
JULIE GARCIA	35 AXE ALY WATSONVILLE CA, 95076	7/11/2018 9:34 AM	1/23/2020 2:04 PM	INVALID/INCOMPLETE	MARY REVIEWED	JULIE GARCIA

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What if ServTraq©  
could automate  
some of the **incoming**  
and **outgoing** contact  
for you?





# SMS Text Message Reminders



# Confirming an Appointment













All customers that **accepted** text reminders will **receive** their appointment confirmation via text.

Reminder: you have a weatherization appointment with TEST AGENCY R1 on Wed Jan 8 at 10:00 AM. Reply 1 to confirm, 2 to cancel, 3 to opt out.

- ▶ Possible customer responses and what it means in ServTraq:
  - ▶ **1 = CONFIRM APPOINTMENT**
    - ▶ Creates notification in ServTraq
    - ▶ Creates contact entry note



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Local Solutions for California

- | Contacts  |  |  |  |  |   |  |   |  |  |  |
|---|--|--|--|--|---|--|---|--|--|--|
|   |  | Contact Date  | Contact Type  | Contact Action  | Call Code  | Language  | Notes  | Mailing Code  | Mailing Date  | Entered By  |
|    |  | 1/6/2020   | INCOMING   | SMS WX APPOINTMENT REMINDER REPLY RECEIVED   | WX CALL - INFO/SCHED/JOB  | ENGLISH  | Reply: 1  |  |  | SYSTEM   |
|   |  | 1/6/2020   | OUTGOING   | SMS WX APPOINTMENT REMINDER SENT   | WX CALL - INFO/SCHED/JOB  | ENGLISH  | OUTGOING SMS APPOINTMENT REMINDER SENT  |  |  | SYSTEM   |



POLL



# Canceled APPOINTMENT

Reminder: you have a weatherization appointment with TEST AGENCY R1 on Wed Jan 8 at 10:00 AM. Reply 1 to confirm, 2 to cancel, 3 to opt out.







- ▶ Possible customer responses and what it means in ServTraq:
  - ▶ **2 = CANCEL APPOINTMENT**
    - ▶ Creates notification in ServTraq
    - ▶ Creates contact entry note with call-code



# Callbacks from Contact Entry Notes



## Contacts

	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date	Entered By
  	1/23/2020	INCOMING	SMS WX APPOINTMENT REMINDER REPLY RECEIVED	WX CALL - INFO/SCHED/JOB	ENGLISH	Reply: 2			SYSTEM
  	1/6/2020	OUTGOING	SMS WX APPOINTMENT REMINDER SENT	WX CALL - INFO/SCHED/JOB	ENGLISH	OUTGOING SMS APPOINTMENT REMINDER SENT			SYSTEM




Create Filter

- ▶ Contact entry logged for customer that cancelled an appointment via text



# Callbacks from Contact Entry Notes

- ▶ Callback was created for customer that cancelled an appointment via text

Customer Callbacks							
<div> View Customer Record    Refresh    Export List ▾   <input type="text" value="Enter Search Criteria..."/></div>							
Customer Name	Call Code	Language	Contact Action	Notes	Contact Date	Phone	
ANGELA B TESTIN	WX CALL - INFO/SCHED/JOB	ENGLISH	SMS WX APPOINTMENT REMINDER REPLY RECEIVED	Reply: 2	1/23/2020	(831) 915-5932	



# Confirming an Appointment



- ▶ Possible customer responses and what it means in ServTraq:
  - ▶ Random number/letter/word = APPOINTMENT REMAINS UNCONFIRMED
    - ▶ Creates notification in ServTraq
    - ▶ Creates contact entry note with call-code
    - ▶ Appointment remains unconfirmed









# Random/Non-Numeric Response


- ▶ A random number/non-numeric response to an appointment reminder creates a callback



# Callbacks from Contact Entry Notes

## Contacts

		Contact Date ▼	Contact Type ▼	Contact Action ▼	Call Code ▼	Language ▼	Notes ▼	Mailing Code ▼	Mailing Date ▼	Entered By ▼
  	1/6/2020	INCOMING	SMS WX APPOINTMENT REMINDER REPLY RECEIVED	WX CALL - INFO/SCHED/JOB	ENGLISH	Reply: Yo yo yo yo. This is a non numeric response			SYSTEM	
  	1/6/2020	OUTGOING	SMS WX APPOINTMENT REMINDER SENT	WX CALL - INFO/SCHED/JOB	ENGLISH	OUTGOING SMS APPOINTMENT REMINDER SENT			SYSTEM	

 [Create Filter](#)

- ▶ Contact entry logged for customer that responded with a non-numeric answer



# Callbacks from Contact Entry Notes



## Customer Callbacks

[View Customer Record](#)[Refresh](#)[Export List](#)


Customer Name	Call Code	Language	Contact Action	Notes	Contact Date	Phone
CHRIS JOHNSON	WX CALL - INFO/SCHED/JOB	ENGLISH	SMS WX APPOINTMENT REMINDER REPLY RECEIVED	Reply: Yo yo yo yo. This is a non numeric response	1/6/2020	

- ▶ Callback was created for customer that responded to confirmation text with something other than accept, cancel, or opt-out



# ServTraq Notifications





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[Home](#)  
[Payment Receipt Log](#)  
[Contacts](#)  
[HEAP](#)  
[Weatherization](#)  
[Inventory](#)  
[Reports](#)  
[Analytics](#)  
[Administration](#)

## Welcome to ServTraq

### Quick Links

- [Customer Contacts](#)
- [HEAP Applications](#)
- [HEAP Data Transfer](#)
- [Weatherization](#)
- [Crew Scheduling](#)
- [Inventory](#)
- [Human Resources](#)

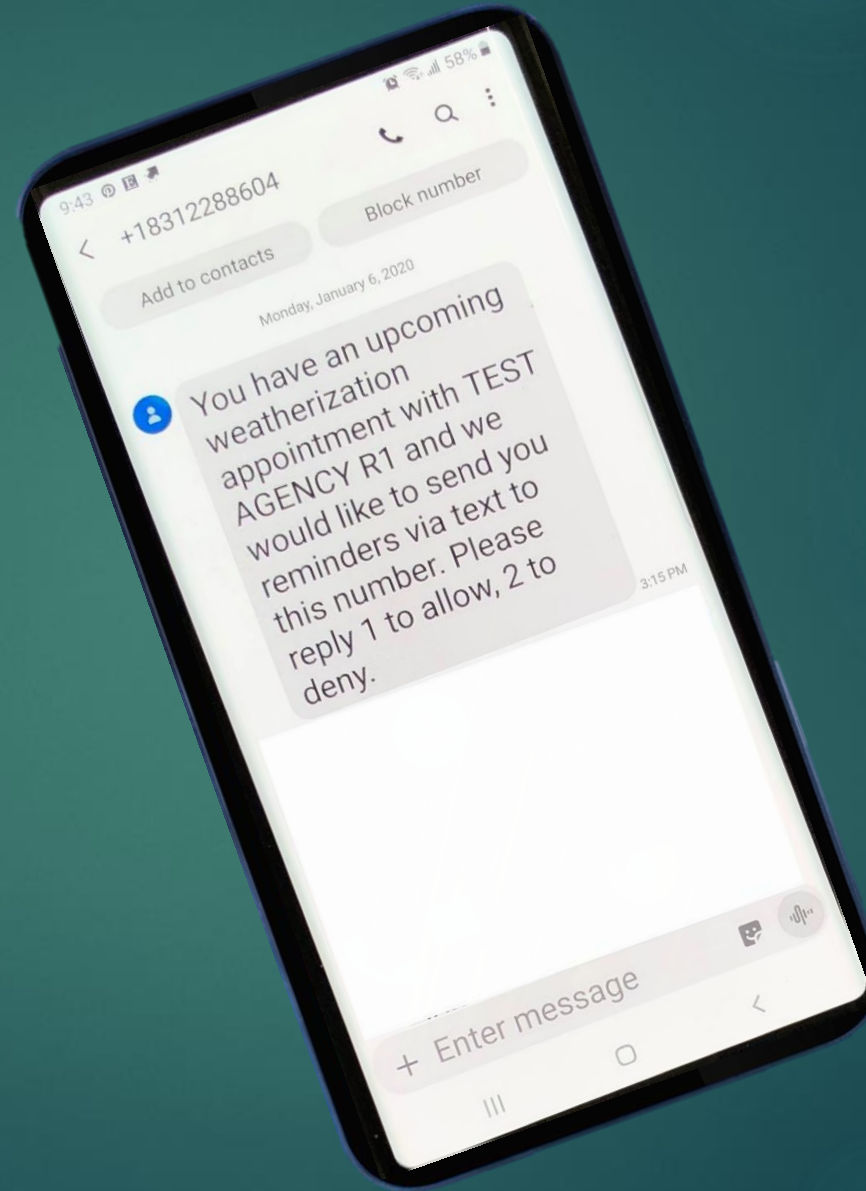
12 new notifications

Message	Date
SMS reply of 3 - Opted Out received from JULIE GARXIA phone number (831) 359-0697 regarding appointment on Wed Jan 29 at 10:00 AM.	1/27/2020 2:51:24 PM
SMS reply of 2 - Cancelled received from ADAMZAMBONI TESTINGTEXT phone number (801) 921-9123 regarding appointment on Wed Jan 29 at 1:00 PM.	1/27/2020 1:01:51 PM
SMS reply of 1 - Confirmed received from JULIE GARXIA phone number (831) 359-0697 regarding appointment on Wed Jan 29 at 10:00 AM.	1/27/2020 11:26:52 AM
SMS reply of 1 - Confirmed received from CHRIS JOHNSON phone number (831) 498-6265 regarding appointment on Wed Jan 29 at 9:00 AM.	1/27/2020 11:26:24 AM
SMS reply of 2 - Cancelled received from ANGELA TESTIN phone number (831) 915-5932 regarding appointment on Wed Jan 8 at 10:00 AM.	1/23/2020 9:00:14 AM
SMS reply of Yo yo yo yo. This is a non numeric response received from CHRIS JOHNSON phone number (831) 498-6265 regarding appointment on Thu Jan 9 at 9:00 AM.	1/6/2020 3:43:34 PM
SMS reply of 3 - Opted Out received from JULIE GARXIA phone number (831) 359-0697 regarding appointment on Fri Jan 10 at 10:00 AM.	1/6/2020 3:16:06 PM
SMS reply of 1 - Confirmed received from ANGELA TESTIN	1/6/2020

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# Coming Soon





# Questions?





# Thanks for joining us!

Questions, comments, or concerns?

Contact us at [info@ServTraq.com](mailto:info@ServTraq.com).

Visit our portal at [Support.ServTraq.com](http://Support.ServTraq.com)