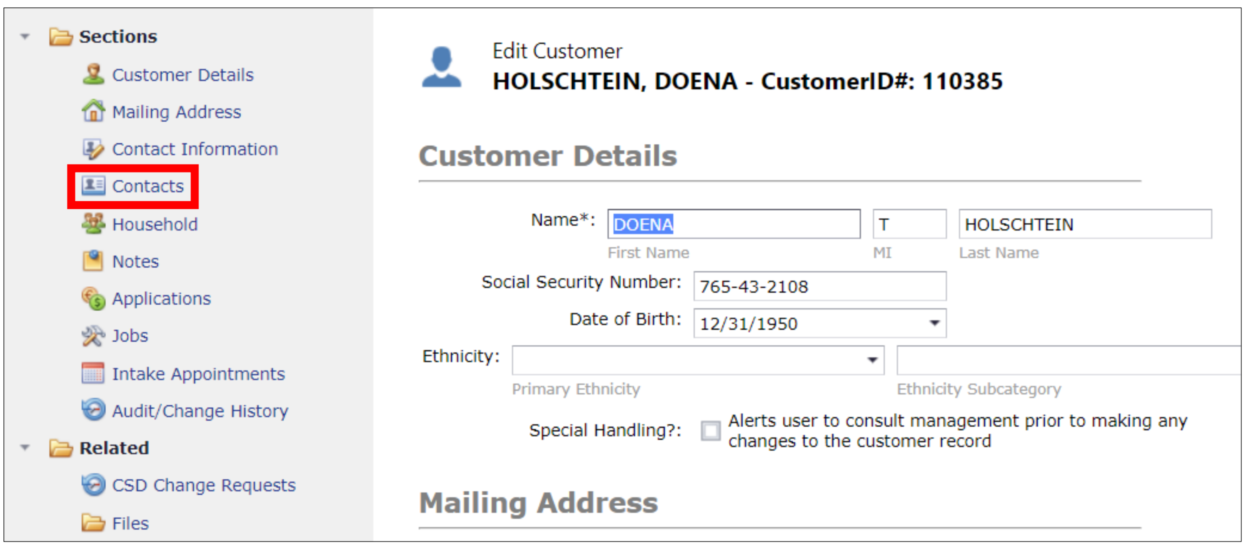
2.3 Contacts (Contact Entry Notes)

The Contacts section offers a simple way of tracking incoming and outgoing customer contact. This feature can be used for both weatherization and payment assistance programs and offers a streamlined way of automating tasks such as follow-up calls, mail-outs, or contact tracking. To add a *Contact Entry Note*, see below.



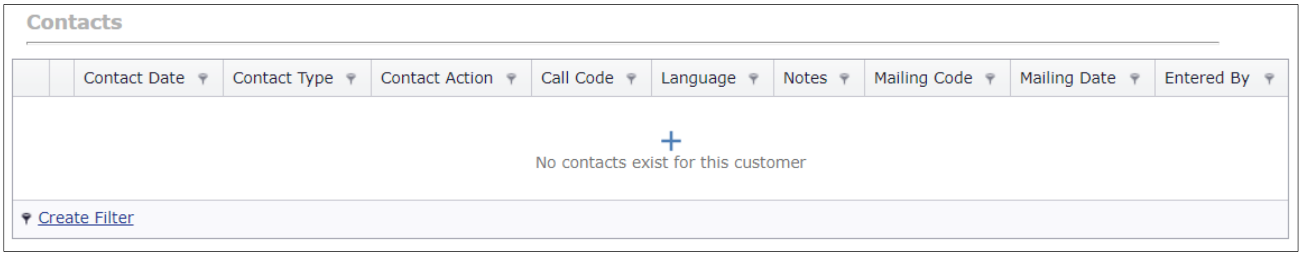
ICON KEY	
+	Add a new customer contact entry note
(edit icon)	Edit a contact entry note
✕	Delete a contact entry note

NOTE

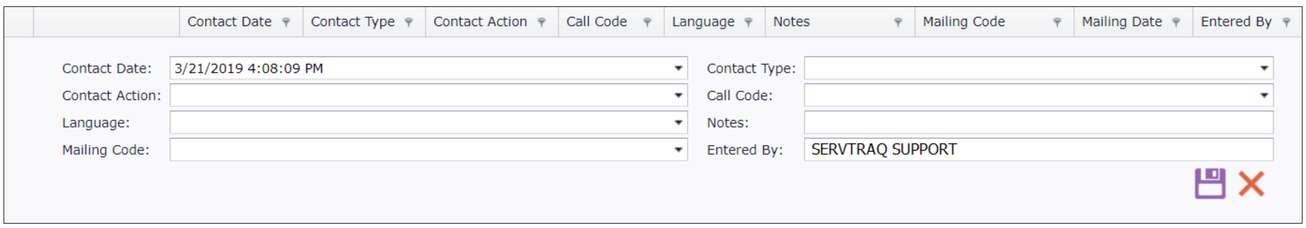
Contact entry notes that are older than 1 day CANNOT be edited

Add a Contact Entry Note

Navigate to the **Contacts** section and click the + icon.



Complete the fields listed in the table below.



Click to save the customer contact entry note OR ✕ to exit without saving the entry.

ENTRY FIELDS	DESCRIPTION
Contact Date	Defaults to the current date and time
Contact Type*	Select: ① *Incoming* or ② *Outgoing*
Contact Action*	Select the description/subject of the call
Call Code*	Select the general reason for the call
Language*	Select the language of the message
Notes	Additional information pertaining to the customer/call
Mailing Code	Select the type of document to be mailed to the customer
Entered By	Defaults to the employee entering the contact action

Required fields are denoted with a red asterisk. (*)

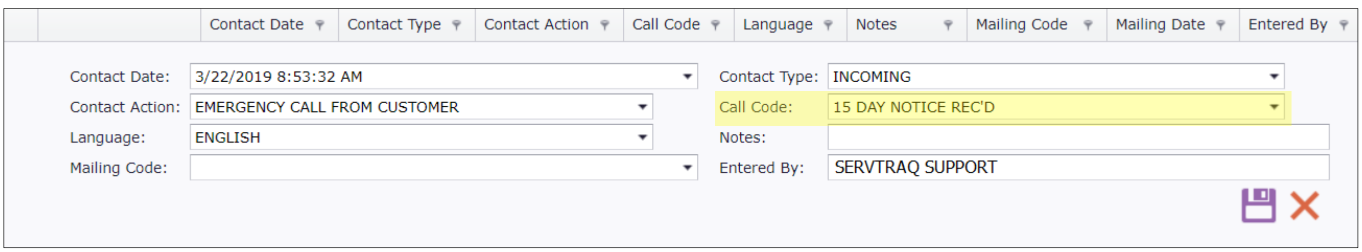
Example 1: Create a Callback

A Contact Entry Note is created to document customer inquiries, requests, or concerns. Depending on the customer's inquiry, a callback from the agency may be required to resolve their issue.

MOST COMMON REASONS FOR CALLBACKS

- ⇨ Application status request
- ⇨ Emergency service request
- ⇨ Deficient application

Callbacks are generated based on the "Call Code" selected. A list of customers that require callbacks are displayed in the *Callbacks* section.



***Above**: A Contact Entry Note is created for a customer that received a 15-day shut off notice. This customer will require a callback from the agency.*

Example 2: Mail-Outs

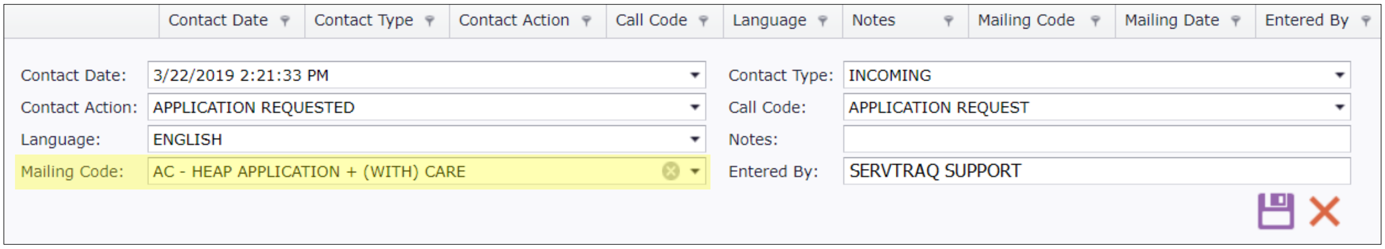
A Contact Entry Note is created to document customer inquiries, requests, or concerns. Depending on the customer's inquiry, the agency may need to mail-out applications, documents, or customer education materials.

Selecting a "Mailing Code":

❶ Indicates the document(s) needed to be mailed-out to the customer
❷ Generates personalized mailing envelopes for the customer

MOST COMMON MAIL-OUTS

- ⇨ HEAP applications
- ⇨ WSAGs/POWs
- ⇨ Deficient applications



Contact Date | Contact Type | Contact Action | Call Code | Language | Notes | Mailing Code | Mailing Date | Entered By

Contact Date: 3/22/2019 2:21:33 PM
Contact Action: APPLICATION REQUESTED
Language: ENGLISH
Mailing Code: AC - HEAP APPLICATION + (WITH) CARE
Contact Type: INCOMING
Call Code: APPLICATION REQUEST
Notes:
Entered By: SERVTRAQ SUPPORT

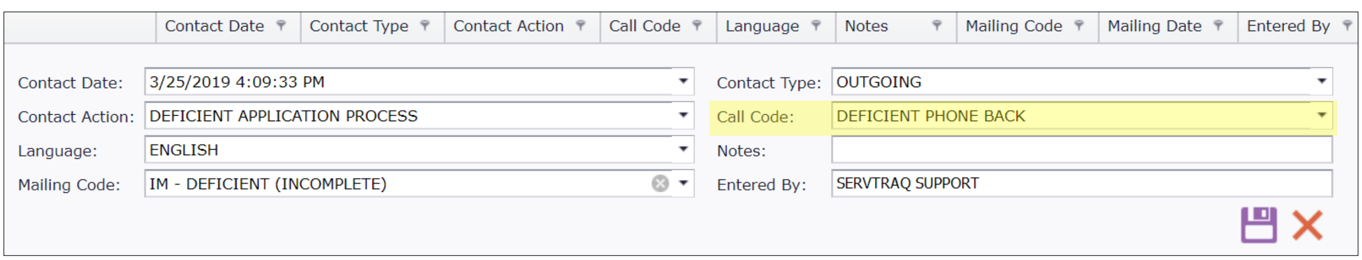
***Above**: A Contact Entry Note is created for a customer that requested a HEAP application. The agency will need to mail the customer an application inside their personalized envelope.*

NOTE

The mailing code should only be utilized if the agency has implemented a mailing system.

Example 3: Track a Deficient Application

A Contact Entry Note can be created to document a customer's deficient/incomplete application and generate callbacks and mail-outs to alert the customer.

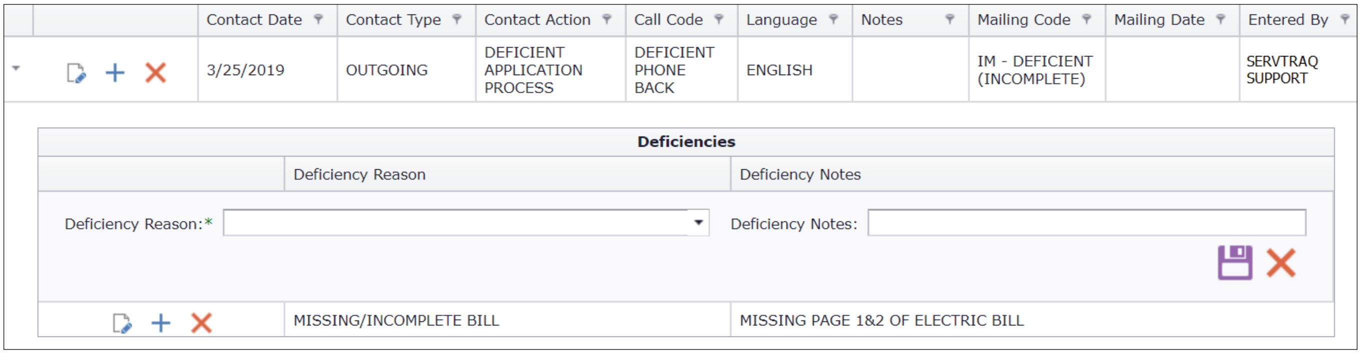


Contact Date | Contact Type | Contact Action | Call Code | Language | Notes | Mailing Code | Mailing Date | Entered By

Contact Date: 3/25/2019 4:09:33 PM
Contact Action: DEFICIENT APPLICATION PROCESS
Language: ENGLISH
Mailing Code: IM - DEFICIENT (INCOMPLETE)
Contact Type: OUTGOING
Call Code: DEFICIENT PHONE BACK
Notes:
Entered By: SERVTRAQ SUPPORT

***Above**: A Contact Entry Note is created for a customer that submitted an incomplete application. This requires a phone call and their incomplete application mailed back.*

Saving a Contact Entry Note with a **DEFICIENT** Call Code will activate the Deficiencies subsection, where a deficiency reason can be added.



	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date	Entered By
	3/25/2019	OUTGOING	DEFICIENT APPLICATION PROCESS	DEFICIENT PHONE BACK	ENGLISH		IM - DEFICIENT (INCOMPLETE)		SERVTRAQ SUPPORT

Deficiencies

	Deficiency Reason	Deficiency Notes
	Deficiency Reason:*	Deficiency Notes:
	MISSING/INCOMPLETE BILL	MISSING PAGE 1&2 OF ELECTRIC BILL

***Above**: The customer's application is deficient because it is missing pages from the electric bill.*

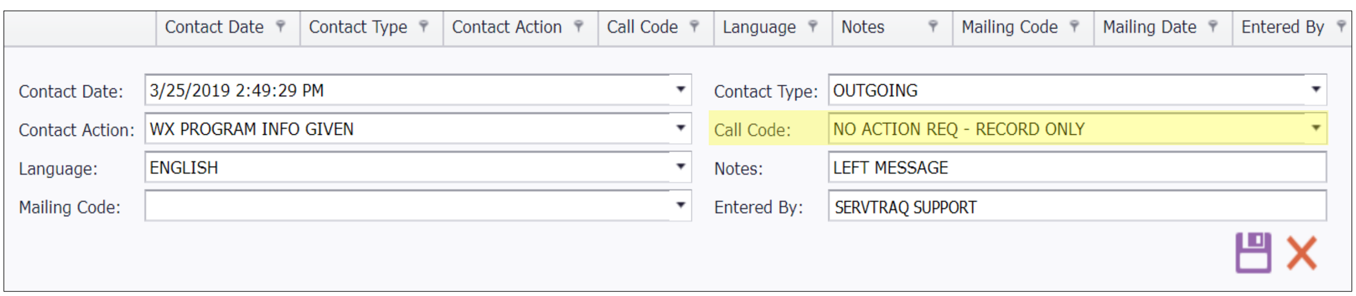
Click on the small arrow next to the icon to expand/minimize the **Deficiencies** subsection.

Example 4: Contact for Record Only

A Contact Entry Note can also be created for the agency's record-keeping purposes. These type of contacts or actions do not require callbacks or mail-outs to customers.

MOST COMMON "RECORD ONLY" ENTRIES

- ⇨ Messages left for the customer
- ⇨ Appointments scheduled
- ⇨ Pledges/commitments
- ⇨ Recertification calls



	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date	Entered By

Contact Date:	3/25/2019 2:49:29 PM	Contact Type:	OUTGOING
Contact Action:	WX PROGRAM INFO GIVEN	Call Code:	NO ACTION REQ - RECORD ONLY
Language:	ENGLISH	Notes:	LEFT MESSAGE
Mailing Code:		Entered By:	SERVTRAQ SUPPORT

***Above**: A Contact Entry Note is created for a customer that received a call from the agency about the WX program.*