

2.1

Customer Search/Incoming Contact Entry

The Customer Search/Incoming Contact Entry feature is used to search for customers using a combination of available contact information. Once a record is found or added, users can build a customer record to track and store information, such as any incoming contact between the customer and the agency.


The screenshot shows the SERVTRAQ web application interface. The top header includes the SERVTRAQ logo with a bear icon and the tagline 'Local Solutions for California'. To the right of the logo, it says 'Welcome 60000STSupport!' followed by links for 'Log Out', 'Change Password', and 'Contact ServTraq Support'. A left sidebar contains a menu with items: Home, Contacts, Incoming Application Processing, Customer Search/Contact Entry (highlighted with a red box), Callbacks, Customer Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The main content area is titled 'Customer Search/Incoming Contact Entry' and features a 'Search Parameters' section with the following fields: Name (First Name, Last Name), Social Security Number, Home Phone (Area Code, Phone Number), Date of Birth, Mailing Address (Street #, Street Name, Unit Number), and Mail Zip/City (Zip Code, City). Below these fields are 'Submit' and 'Clear' buttons. At the bottom of the main area, there is a toolbar with icons for '+ New Customer', 'Edit Customer', 'Refresh List', 'Export List', and a search bar labeled 'Enter Search Criteria...'. The bottom right corner of the toolbar contains two small icons: a blue person icon and a red/orange icon.

ICON KEY

	Add a new customer
	Edit the customer record
	Refresh the search results
	Export search results to PDF, Excel (XLS, XLSX, CSV), or Word (RTF) Format
	Apply search criteria
	Clear search criteria

Customer Search

Search for a customer using any or all of the fields listed in the table below.

 **Customer Search/Incoming Contact Entry**

Search Parameters

Name:

DOENA

HOLSCHTEIN

Social Security Number:

765-43-2108

Home Phone:

Area Code

Phone Number

Date of Birth:

Mailing Address:

Street #

Street Name

Unit Number

Mail Zip/City:

Zip Code

City

Submit

Clear

Click **Submit** to run the search. Click **Clear** to erase the fields.

ENTRY FIELDS	DESCRIPTION
Name	① First Name ② Last Name
Social Security Number	The customer's 9-digit SSN
Home Phone	Home phone number without a hyphen
Date of Birth	Customer's DOB in the following format: MM/DD/YYYY
Mailing Address	① Street Number ② Street Name/PO Box ③ Unit Number
Mail Zip/City	① Zip Code ② City

Search Results

Records found are displayed under Search Results.


+ New Customer Edit Customer Refresh List Export List Enter Search Criteria...							
Search Results							
Name	SSN	Date of Birth	Mailing Address	Mail City	Mail Zip Code	County	Phone
DOENA T HOLSCHEIN	765-43-2108	12/31/1950	1 THIS WAY APT A	WATSONVILLE	95077	SANTA CRUZ	(831) 555-0101
Page 1 of 1 (1 items) 1 Page size: 50							

Customer record not found? → Click **New Customer** to create a new customer record.

Customer record exists? → Click on the customer's [NAME](#) OR double-click on the search result to open the customer record.

Add a New Customer

If the customer record is not found, click New Customer to create a new record.

 Customer Search/Incoming Contact Entry

Search Parameters
Name:
Social Security Number:
Home Phone:
Date of Birth:
Mailing Address:
Mail Zip/City:

+ New Customer | Edit Customer | Refresh List | Export List

Search Results

Name	SSN	Date of Birth	Mailing Address	Mail City	Mail Zip Code	County	Phone
No matches for the provided search criteria							

QUICK TIP

Any information entered in the **search** will transfer to the appropriate fields when creating a new customer record.

I. Customer Details

The Customer Details section is designed to track customer personal information. Fill out the following fields below:

Customer Details

Name*:

DOENA

T

HOLSCHEIN

First Name

MI

Last Name

Social Security Number:

765-43-2108

Date of Birth:

12/31/1950

Ethnicity:

Primary Ethnicity

Ethnicity Subcategory

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

NOTE



Fields with drop down arrows contain a menu of available options.

ENTRY FIELDS	DESCRIPTION
Name	① First Name* ② Middle Initial ③ Last Name*
Social Security Number	The customer's 9-digit SSN
Date of Birth	Customer's DOB in the following format: MM/DD/YYYY
Ethnicity	① Primary Ethnicity ② Ethnicity Subcategory
Special Handling?	Check <input checked="" type="checkbox"/> if the customer/record requires additional review from management

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

II. Mailing Address

The Mailing Address is tracked through this section. To add a *Mailing Address*, see the fields listed in the table below.

Mailing Address				
Line 1:	<input type="text" value="1"/>	<input type="text" value="THIS"/>	<input type="text" value="WAY"/>	<input type="button" value="x"/>
	Address #	Address Street/PO Box	Street Type	
Line 2:	<input type="text" value="APARTMENT"/>	<input type="text" value="A"/>		
	Building Type	Unit Number		
Line 3:	<input type="text" value="95077"/>	<input type="text" value="WATSONVILLE"/>	<input type="text" value="SANTA CRUZ"/>	<input type="text" value="CA"/>
	Zip Code	City	County	State

ENTRY FIELDS	DESCRIPTION
Line 1	① Address Number ② Street Name/PO Box ③ Street Type
Line 2	① Building Type ② Unit Number
Line 3	① Zip Code ② City* ③ County* ④ State*

**These fields automatically populate after the zip code is entered.*

III. Contact Information

The Contact Information section is used to track various phone numbers as well as an e-mail address. To add Contact Information, see the fields listed below.

Contact Information		
Home Phone:	<input type="text" value="831"/>	<input type="text" value="555-0101"/>
	Area Code	Phone Number
Message Phone:	<input type="text" value="() -"/>	<input type="text" value=""/>
	Number	Ext
Mobile Phone:	<input type="text" value="() -"/>	
	Number	
Other Phone:	<input type="text" value="() -"/>	<input type="text" value=""/>
	Number	Ext
Email Address:	<input type="text" value="dth@email.com"/>	
Best Time to Call:	<input type="text" value="AFT"/>	
Preferred Contact Method:	<input type="text" value="US Mail"/>	

ENTRY FIELDS	DESCRIPTION
Home Phone	Landline phone number
Message Phone	Phone number capable of receiving messages
Mobile Phone	Cellular mobile phone number
Other Phone	Other contact phone number
Email Address	Email address for online communication, receipts, confirmations, etc.
Best Time to Call	Select from: ① Afternoon (AFT) ② Evening (EVE) ③ Morning (MORN) OR ④ None
Preferred Contact Method*	Select from: ① Email ② SMS Text Message OR ③ US Mail

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

**NOTE**

The three sections above must be completed and saved to activate additional sections within the Customer Record.