


2.5 Callbacks

The Callbacks list is where the agency manages follow-up calls to customers regarding any inquiries, requests, and concerns. Callbacks are created based on the “Call Code” selected in the Contact Entry Note.

The calls on the Callbacks list are organized and prioritized according to **time-sensitivity** and **urgency**. Calls that are not cleared within 20 days of the initial contact date are automatically removed from the Callbacks list.

CALLBACK ORDER IN QUEUE

- ① Shut-off notice received
 - ⇒ 15-day
 - ⇒ 48-hour
- ② Other callbacks by call-in date



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TRAQ

Local Solutions for California

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Home

Contacts

Incoming Application Processing

Customer Search/Contact Entry

Callbacks

Customer Contacts

Customer Callbacks

View Customer Record

Refresh

Export List


Enter Search Criteria...

| Customer Name | Call Code | Language | Phone | Contact Action | Notes |
|-------------------|----------------------|----------|----------------|--------------------------------|--------------------------|
| JANE DOE | 48 HR NOTICE REC'D | LATVIAN | (510) 881-0300 | COMMITMENT REQUEST | |
| DOENA T HOLSCHEIN | DEFICIENT PHONE BACK | ENGLISH | (831) 555-0101 | DEFICIENT APPLICATION PROCESS | |
| JOHN JOHN DOE | CALL BACK REQUESTED | ENGLISH | | DISTRESSED OR UNHAPPY CUSTOMER | WANT TO SPEAK TO MANAGER |


Filter Callbacks


Callbacks can be sorted and filtered through 3 different methods:


- ① **The Search Box** – filter through records using key words
- ② **Column Headers** – sort records in ascending/descending order by clicking on the header
- ③ **Column Filters** – select from the list of search criteria options



Customer Callbacks



View Customer Record

Refresh

Export List

COLUMN HEADERS

SEARCH BOX





Enter Search Criteria...

| Customer Name | Call Code | Language | Phone | Contact Action | Notes | Contact Date | Mailing Address | Mail City |
|----------------------|-------------------------|--|-------|-----------------------------------|--------------------------|--------------|------------------|-------------|
| JANE DOE | 48 HR NOTICE REC'D | <div><div><div>Q Enter text to filter...</div></div></div> | | COMMITMENT REQUEST | | 3/28/2019 | 1234 MAIN ST | HAYWARD |
| DOENA T HOLSCHEIN | DEFICIENT PHONE BACK | <div>(All) (Blanks) (Non blanks)</div> | | DEFICIENT APPLICATION PROCESS | | 3/25/2019 | 1 THIS WAY APT A | WATSONVILLE |
| JOHN JOHN DOE | CALL BACK REQUESTED | <div>48 HR NOTICE REC'D CALL BACK REQUESTED DEFICIENT PHONE BACK</div> | | DISTRESSED OR UNHAPPY CUSTOMER | WANT TO SPEAK TO MANAGER | 3/28/2019 | 100 AVIATON WAY | WATSONVILLE |
| | | <div>COLUMN FILTERS</div> | | | | | | |

Clear a Callback

A Callback record can be cleared by creating a *Contact Entry Note* for that specific customer.

Select the Callback record and click **View Customer Record** OR click on the customer's [NAME](#).

| Customer Callbacks | | | | | |
|--|----------------------|----------|----------------|--------------------------------|--------------------------|
|  Customer Callbacks | | | | | |
|  View Customer Record  Refresh  Export List <input type="text" value="Enter Search Criteria..."/> | | | | | |
| Customer Name | Call Code | Language | Phone | Contact Action | Notes |
| JANE DOE | 48 HR NOTICE REC'D | LATVIAN | (510) 881-0300 | COMMITMENT REQUEST | |
| DOENA T HOLSCHEIN | DEFICIENT PHONE BACK | ENGLISH | (831) 555-0101 | DEFICIENT APPLICATION PROCESS | |
| JOHN JOHN DOE | CALL BACK REQUESTED | ENGLISH | (831) 277-0000 | DISTRESSED OR UNHAPPY CUSTOMER | WANT TO SPEAK TO MANAGER |

Click on the [Contacts](#) link in the left panel OR scroll down to the section.

Save

Save and Close

Save and Add Application

Exit

Delete

Refresh

Sections

Customer Details

Mailing Address

Contact Information

Contacts

Household

Notes

Applications

Jobs

Intake Appointments

Related

CSD Change Requests

Files

Edit Customer

DOE, JANE - CustomerID#: 106174

Customer Details

Name: JANE DOE

First Name MI Last Name

Social Security Number: 123-45-6788

Date of Birth:





Ethnicity: AMER. INDIAN/ALASKAN NATIVE

Primary Ethnicity Ethnicity Subcategory

Mailing Address



Click the **+** icon to add a new Contact Entry Note.

Contacts

| | Contact Date ▼ | Contact Type ▼ | Contact Action ▼ | Call Code ▼ | Language ▼ | Notes ▼ | Mailing Code ▼ | Mailing Date ▼ | Entered By ▼ |
|---|----------------|----------------|--------------------|--------------------|------------|---------|----------------|----------------|------------------|
|    | 3/28/2019 | INCOMING | COMMITMENT REQUEST | 48 HR NOTICE REC'D | LATVIAN | | | | SERVTRAQ SUPPORT |
|  Create Filter | | | | | | | | | |

Fill out the following fields and click  to save.







| Contact Date ▼ | Contact Type ▼ | Contact Action ▼ | Call Code ▼ | Language ▼ | Notes ▼ | Mailing Code ▼ | Mailing Date ▼ | Entered By ▼ |
|-----------------------------------|------------------------|---|--|-------------------|----------------------|----------------|----------------|------------------------------|
| Contact Date: 4/8/2019 3:27:09 PM | Contact Type: OUTGOING | Contact Action: FAXED COMMITMENT (1ST TIME) | Call Code: NO ACTION REQ - RECORD ONLY | Language: LATVIAN | Notes: PLEDGED \$200 | Mailing Code: | | Entered By: SERVTRAQ SUPPORT |





| ENTRY FIELDS | DESCRIPTION |
|-----------------|--|
| Contact Date | Defaults to current date and time |
| Contact Type* | Must select: "OUTGOING" |
| Contact Action* | Must select applicable option to clear existing callback |
| Call Code* | Must select: "RESOLVED – NO ACTION REQUIRED" <u>OR</u> "NO ACTION REQ - RECORD ONLY" |
| Language* | Select the customer's preferred language |
| Notes | Any additional notes/comments |
| Mailing Code | Select the types of document(s) to be mailed out |

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

The newly created outgoing contact entry note will remove the customer's pending callback from the Callbacks list.

| Contacts | | | | | | | | | | |
|---|----------------|----------------|-----------------------------|-----------------------------|------------|---------------|----------------|----------------|------------------|--|
| | Contact Date ▼ | Contact Type ▼ | Contact Action ▼ | Call Code ▼ | Language ▼ | Notes ▼ | Mailing Code ▼ | Mailing Date ▼ | Entered By ▼ | |
|    | 4/8/2019 | OUTGOING | FAXED COMMITMENT (1ST TIME) | NO ACTION REQ - RECORD ONLY | LATVIAN | PLEDGED \$200 | | | SERVTRAQ SUPPORT | |
|    | 3/28/2019 | INCOMING | COMMITMENT REQUEST | 48 HR NOTICE REC'D | LATVIAN | | | | SERVTRAQ SUPPORT | |

 [Create Filter](#)

After the Contact Entry Note has been created, click **Save and Close** to exit the Customer Record.

Save

Save and Close

Save and Add Application

Exit

Delete

Refresh

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Edit Customer

DOE, JANE - CustomerID#: 106174

Customer Details

Name:

JANE

DOE

First Name

MI

Last Name

Social Security Number:

123-45-6788

Date of Birth:

Ethnicity:

AMER. INDIAN/ALASKAN NATIVE

Primary Ethnicity

Ethnicity Subcategory

Mailing Address