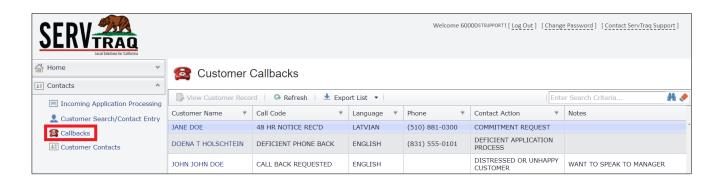
2.5 Callbacks

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 <u>not</u> cleared within 20 days of the initial contact date are automatically removed from the Callbacks list.

CALLBACK ORDER IN QUEUE

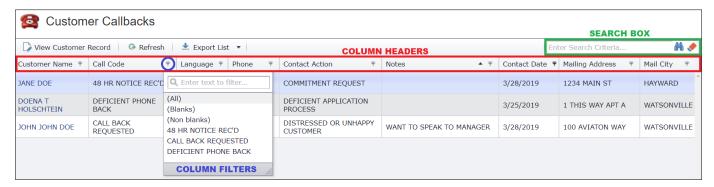
- ① Shut-off notice received
 - ⇒ 15-day
 - ⇒ 48-hour
- ② Other callbacks by call-in date



Filter Callbacks

Callbacks can be sorted and filtered through 3 different methods:

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



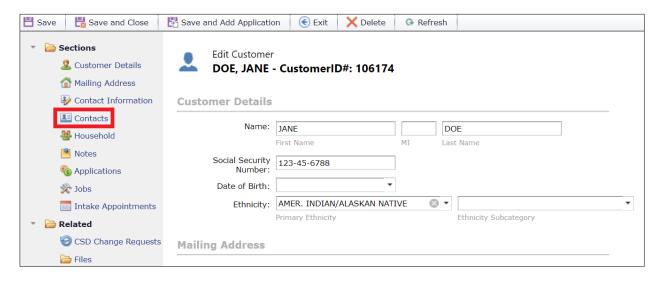
Clear a Callback

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.



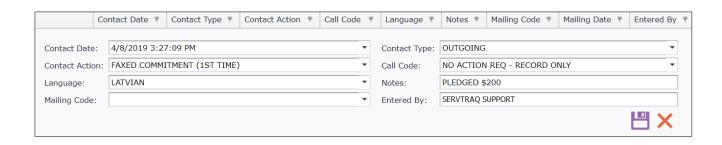
Click on the Contacts link in the left panel OR scroll down to the section.



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



Fill out the following fields and click 💾 to save.



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 <u>outgoing</u> contact entry note will remove the customer's pending callback from the Callbacks list.



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

