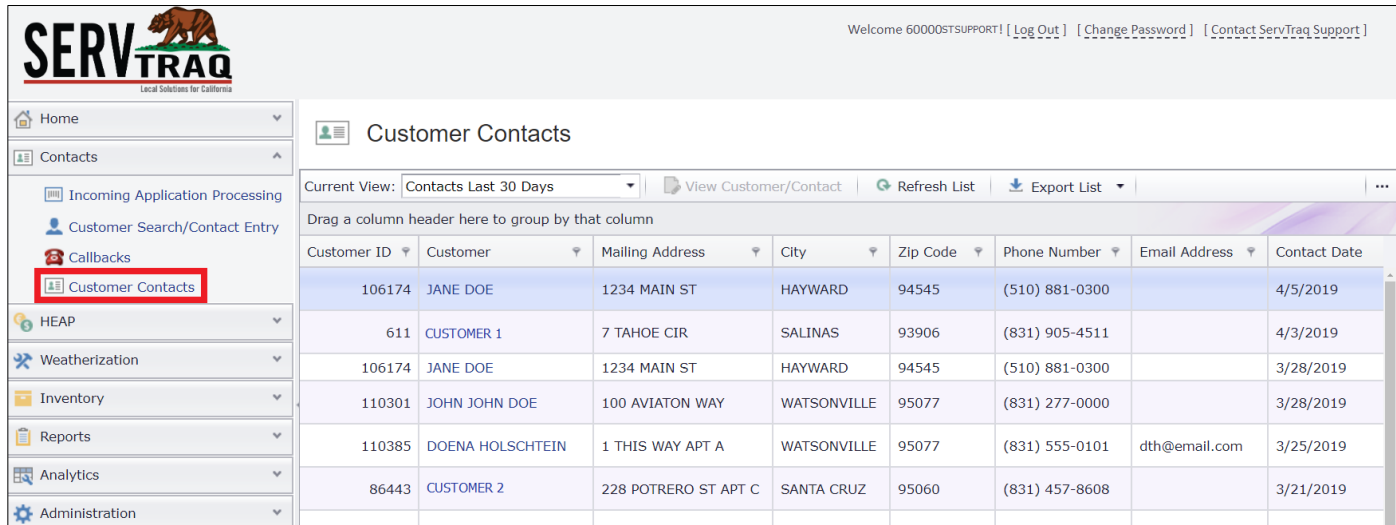


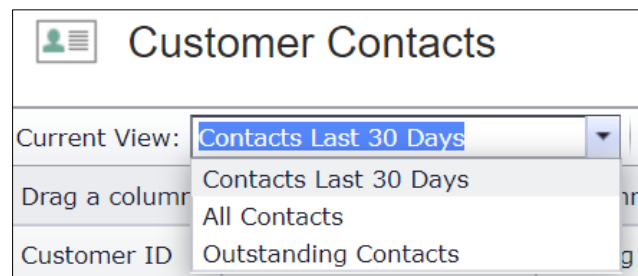
2.6 Customer Contacts

The Customer Contact feature displays a list of all Contact Entry Notes that have been entered. It serves as a monitoring report that can be filtered and sorted in a number of ways to display broad or narrow results. This feature is available when the Contact Entry feature is used to track customer contact.



| Customer ID | Customer | Mailing Address | City | Zip Code | Phone Number | Email Address | Contact Date |
|-------------|------------------|----------------------|-------------|----------|----------------|---------------|--------------|
| 106174 | JANE DOE | 1234 MAIN ST | HAYWARD | 94545 | (510) 881-0300 | | 4/5/2019 |
| 611 | CUSTOMER 1 | 7 TAHOE CIR | SALINAS | 93906 | (831) 905-4511 | | 4/3/2019 |
| 106174 | JANE DOE | 1234 MAIN ST | HAYWARD | 94545 | (510) 881-0300 | | 3/28/2019 |
| 110301 | JOHN JOHN DOE | 100 AVIATON WAY | WATSONVILLE | 95077 | (831) 277-0000 | | 3/28/2019 |
| 110385 | DOENA HOLSCHTEIN | 1 THIS WAY APT A | WATSONVILLE | 95077 | (831) 555-0101 | dth@email.com | 3/25/2019 |
| 86443 | CUSTOMER 2 | 228 POTRERO ST APT C | SANTA CRUZ | 95060 | (831) 457-8608 | | 3/21/2019 |

Page View



The Customer Contacts list can be displayed in three different ways:

- ❶ **Contacts Last 30 Days** – incoming and outgoing customer contacts within the last 30 calendar days
- ❷ **All Contacts** – complete history of all incoming & outgoing customer contacts
- ❸ **Outstanding Contacts** – pending callbacks to be cleared/resolved

Filter Customer Contacts

The Customer Contacts list can be filtered and sorted by using the Column Headers and the Grouping Section. Column Filters can be used to further narrow the customer contact information.



COLOR KEY



- Grouping section
- Column header
- Column filter



| Customer Contacts | | | | | | | |
|---|------------------|--------------|--------------------------------|-----------------------------|----------|----------------|--|
| Drag a column header here to group by that column | | | | | | | |
| Customer ID | Customer | Contact Date | Contact Action | Call Code | Language | Phone Number | |
| 106174 | JANE DOE | 4/5/2019 | CLEARED CALL-NO CALL OR ACTION | NO ACTION REQ - RECORD ONLY | LATVIAN | (510) 881-0300 | |
| 611 | CUSTOMER 1 | 4/3/2019 | PROGRAM/APPLICATION INFO GIVEN | NO ACTION REQ - RECORD ONLY | ENGLISH | (831) 905-4511 | |
| 106174 | JANE DOE | 3/28/2019 | COMMITMENT REQUEST | 48 HR NOTICE REC'D | LATVIAN | (510) 881-0300 | |
| 110301 | JOHN JOHN DOE | 3/28/2019 | DISTRESSED OR UNHAPPY CUSTOMER | CALL BACK REQUESTED | ENGLISH | (831) 277-0000 | |
| 110385 | DOENA HOLSCHTEIN | 3/25/2019 | DEFICIENT APPLICATION PROCESS | DEFICIENT PHONE BACK | ENGLISH | (831) 555-0101 | |



To filter the customer contacts list:


Drag and drop any Column Header(s) into the Grouping Section.


Current View: All Contacts   View Customer/Contact


Call Code  

Contact Action  

Language  

Customer ID 

Customer 

Contact Date 

Phone Number

▶

Call Code: 15 DAY NOTICE REC'D

▶

Call Code: 48 HR NOTICE REC'D

▶

Call Code: APPLICATION REQUEST

▶

Call Code: APPOINTMENT/IN AGENCY

▶

Call Code: ASSISTER/AGENCY INVOLVED

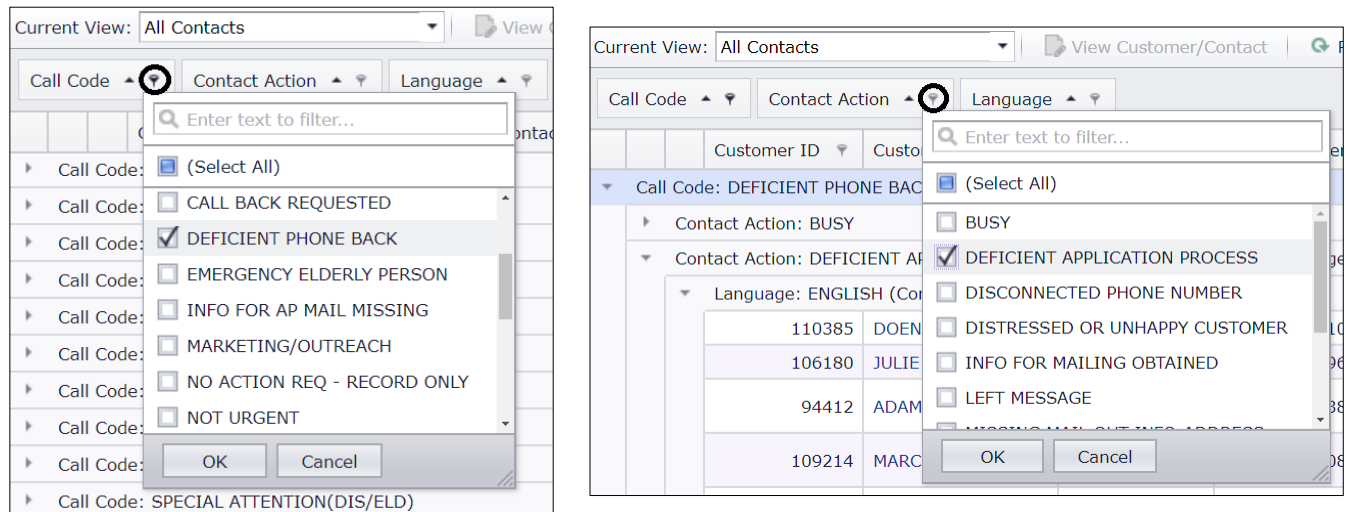
▶

Call Code: CALL BACK REQUESTED

▶

Call Code: DEFICIENT PHONE BACK

Click on the Column Filter of any Column Header and select from the criteria options to narrow the results. Click **OK** when finished.



Click the side arrows to view customer contact(s) entered under the filters selected.

Current View:

All Contacts

View Customer/Contact

Refresh List

Export List

Call Code

Contact Action

Language

| | | Customer ID | Customer | Contact Date | Phone Number | Mailing Address | City |
|---|--------|------------------|-----------|----------------|------------------------|-----------------|------|
| Call Code: DEFICIENT PHONE BACK | | | | | | | |
| <div> Contact Action: DEFICIENT APPLICATION PROCESS</div> | | | | | | | |
| <div><div></div>Language: ENGLISH</div> | | | | | | | |
| | 110385 | DOENA HOLSCHTEIN | 3/25/2019 | (831) 555-0101 | 1 THIS WAY APT A | WATSONVILLE | |
| | 106180 | JULIE GARCIA | 7/11/2018 | (831) 359-0969 | 35 AXE ALY | WATSONVILLE | |
| | 94412 | CUSTOMER 3 | 8/1/2016 | (831) 406-4389 | 15 W LAKE AVE RM 511 | WATSONVILLE | |
| | 109214 | MARCO POLO | 2/19/2015 | (831) 761-7080 | 135 AVIATION WAY STE 7 | WATSONVILLE | |

ALL selected filters are displayed in a [Link](#) located at the bottom of the list, as shown below.

| | | | |
|---|--|---------------|--|
| Page 1 of 3 (110 items) | | Page size: 50 | |
| [Call Code].Equals 'DEFICIENT PHONE BACK' And [Contact Action].Equals 'DEFICIENT APPLICATION... | | | |

QUICK TIP

Click [Clear](#) to delete the filters selected and view all results.

Generate a Customer Contacts Report

Filter and sort the Customer Contacts list to the relevant and desired criteria.

| | | | |
|---------------------------------------|----------------|-----------------------|---------------------------|
| Current View: All Contacts | | View Customer/Contact | |
| Call Code | Contact Action | Language | |
| | Customer ID | Customer | Contact Date Phone Number |
| ▶ Call Code: 15 DAY NOTICE REC'D | | | |
| ▶ Call Code: 48 HR NOTICE REC'D | | | |
| ▶ Call Code: APPLICATION REQUEST | | | |
| ▶ Call Code: APPOINTMENT/IN AGENCY | | | |
| ▶ Call Code: ASSISTER/AGENCY INVOLVED | | | |
| ▶ Call Code: CALL BACK REQUESTED | | | |
| ▶ Call Code: DEFICIENT PHONE BACK | | | |

Click **Export List** and select the document type to export the filtered Customer Contacts list into a downloadable report.

| | | | | | | | |
|--|-----------------|------------------------|--|-----------------|--|-------------|--|
| Current View: All Contacts | | View Customer/Contact | | Refresh List | | Export List | |
| Call Code | Contact Action | Language | | | | | |
| | Customer ID | Customer | | Mailing Address | | | |
| ▼ Call Code: DEFICIENT PHONE BACK (Continued on the next page) | | | | | | | |
| ▼ Contact Action: DEFICIENT APPLICATION PROCESS (Continued on the next page) | | | | | | | |
| ▼ Language: ENGLISH (Continued on the next page) | | | | | | | |
| 110385 | DOENA HOLSCHEIN | 1 THIS WAY APT A | | WATSONVILLE | | | |
| 106180 | JULIE GARCIA | 35 AXE ALY | | WATSONVILLE | | | |
| 94412 | CUSTOMER 3 | 15 W LAKE AVE RM 511 | | WATSONVILLE | | | |
| 109214 | MARCO POLO | 135 AVIATION WAY STE 7 | | WATSONVILLE | | | |