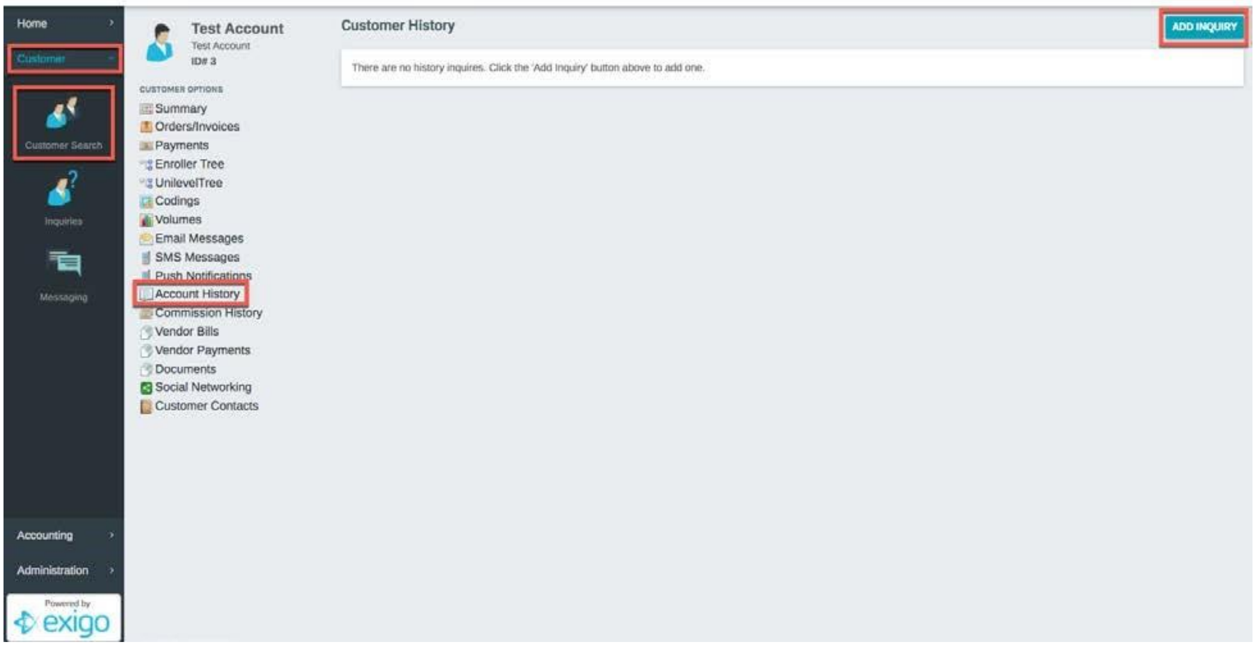
Action Tracking:

Creating and Managing Entries

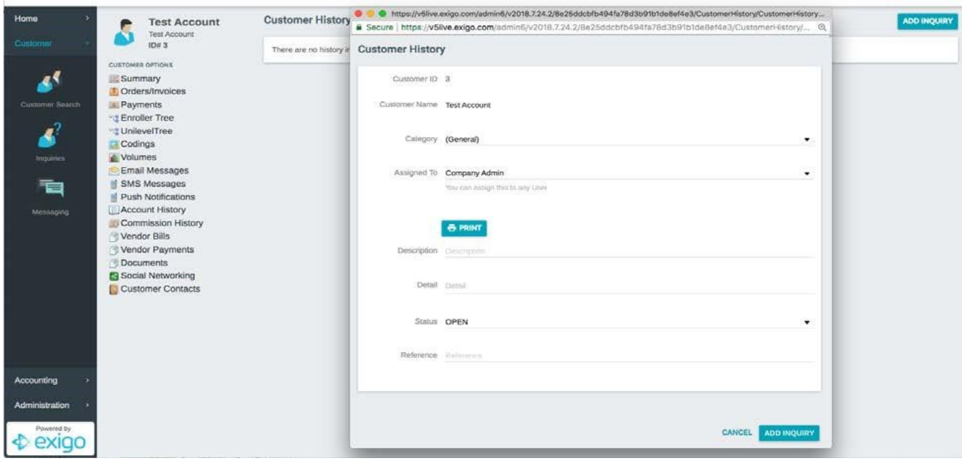
v 1.1

CREATING ENTRIES

1. Log in to Exigo.com.
2. To set up a New Action Tracking Entry a/k/a New Inquiry, we will access the Customer Record of the associated Customer.
3. Go to Customer > Customer Search > Click on the Appropriate Customer > Account History.



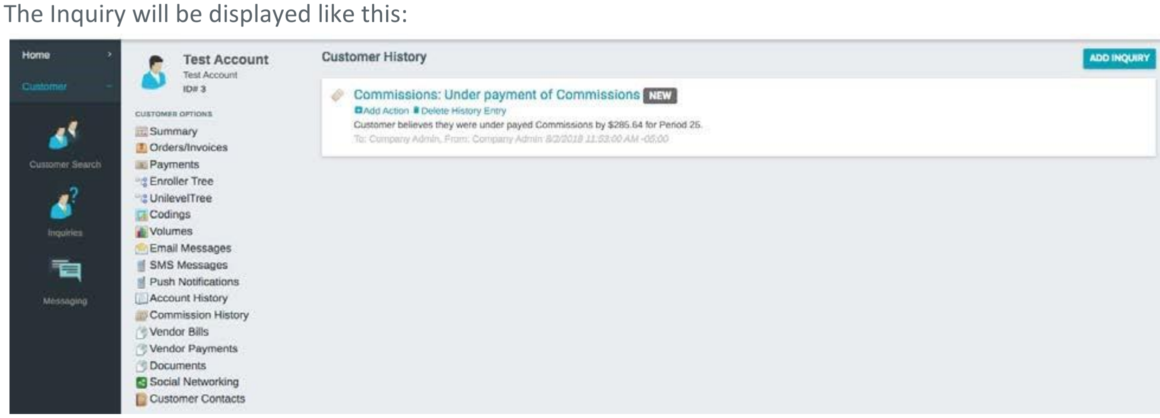
4. This screen will show any existing Action Tracking Items for this Customer.
5. To Add a New Action Tracking Item a/k/a Inquiry click “ADD INQUIRY”.



Review the following fields:

a. Customer ID = Automatically populated by System
b. Customer Name = Automatically populated by System
c. Category = Select the Action Tracking Category relevant to this entry
d. Assigned To = Select the User who will own this Inquiry. This is the User that will perform the work for this Inquiry.
e. Description = Short Description of the Inquiry
f. Detail = All relevant details around the Inquiry
g. Status = Select the appropriate Status from the dropdown list:
    i. Open
    ii. Closed
    iii. New
    iv. Pending
    v. Solved
h. Reference = User defined field.

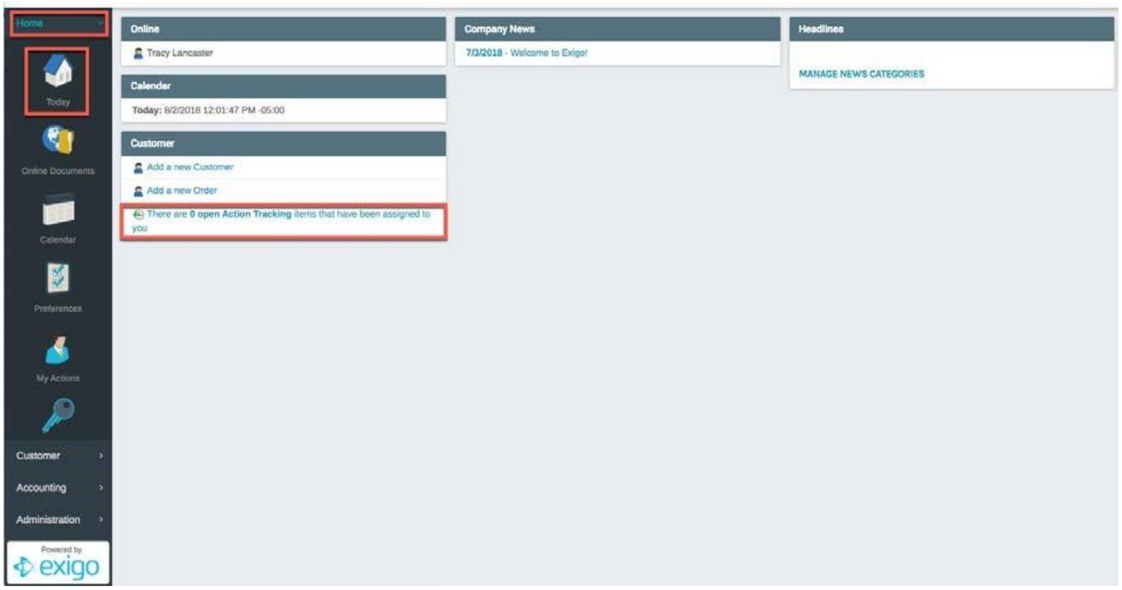
6. Click "ADD INQUIRY".
7. The Inquiry will be displayed like this:



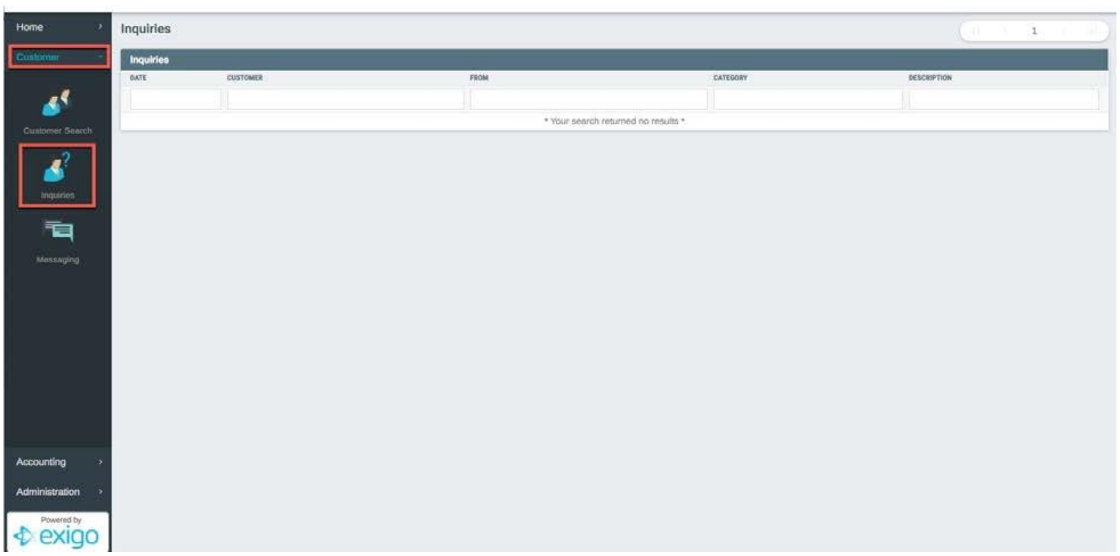
View Inquiries Assigned to Me

To view all Action Tracking Items a/k/a Inquiries assigned to you, this is available in two places:

a. Home > Today > Customer



b. Customers > Inquiries



Inquiries may be updated as needed from either location – including the status. When the Inquiry has been resolved, the Status should be updated to Solved.