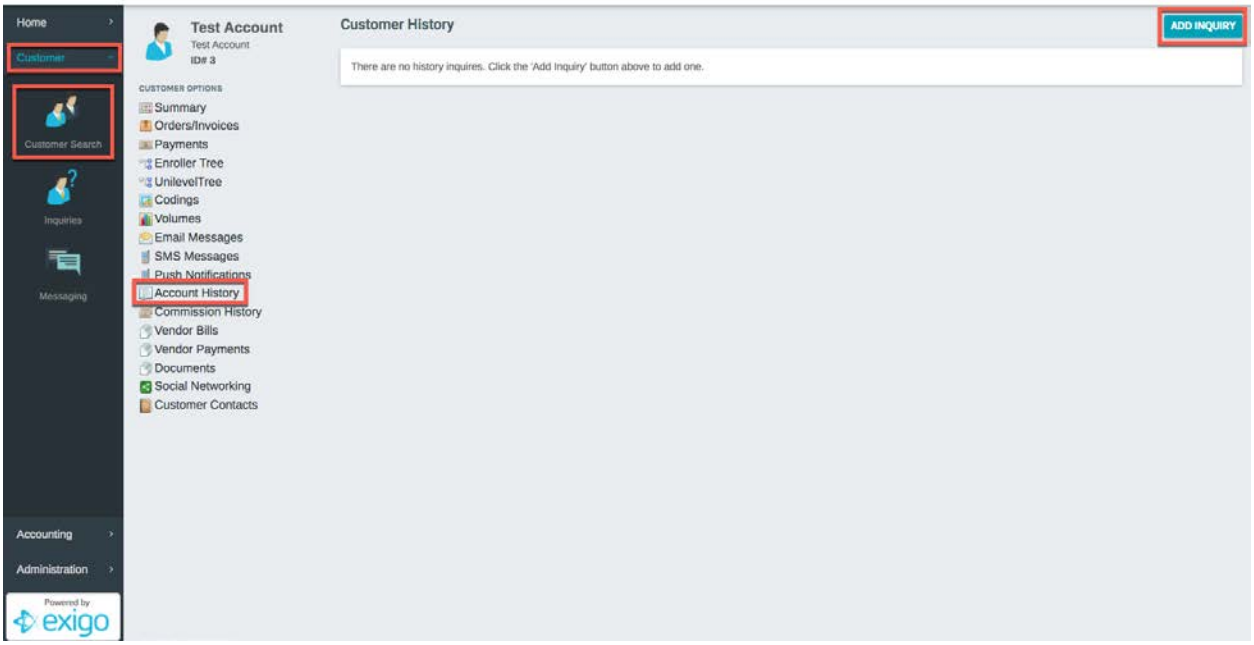
Action Tracking:

Creating and Managing Entries

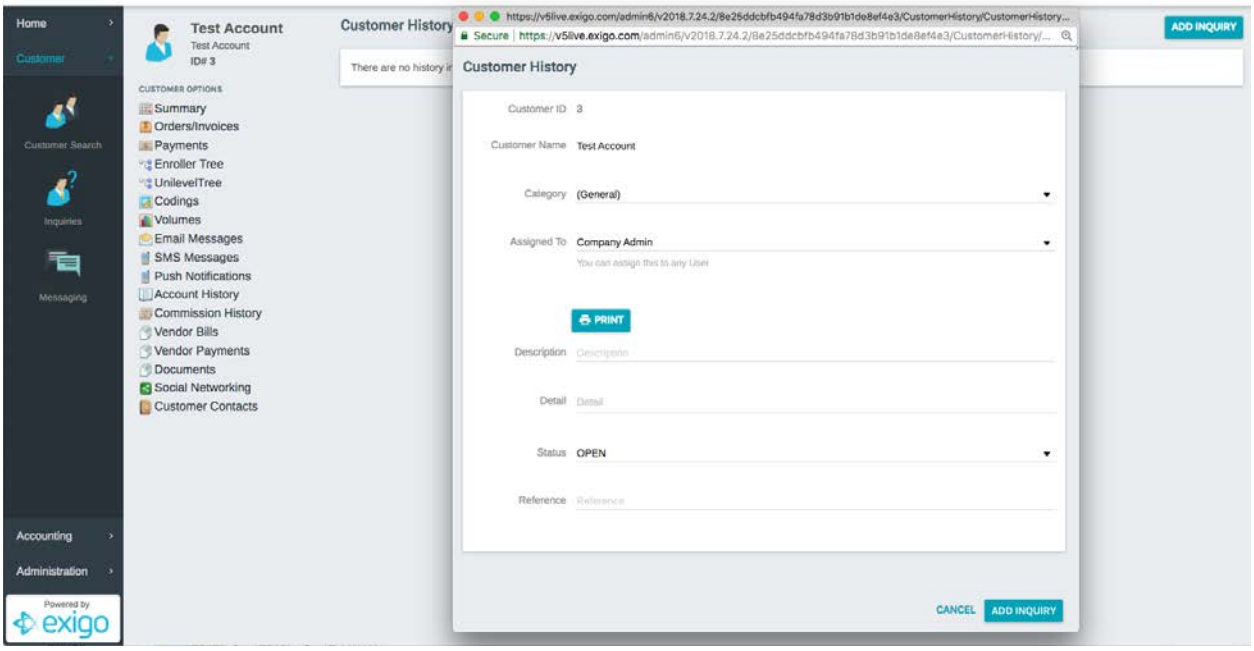
v 1.0

CREATING ENTRIES

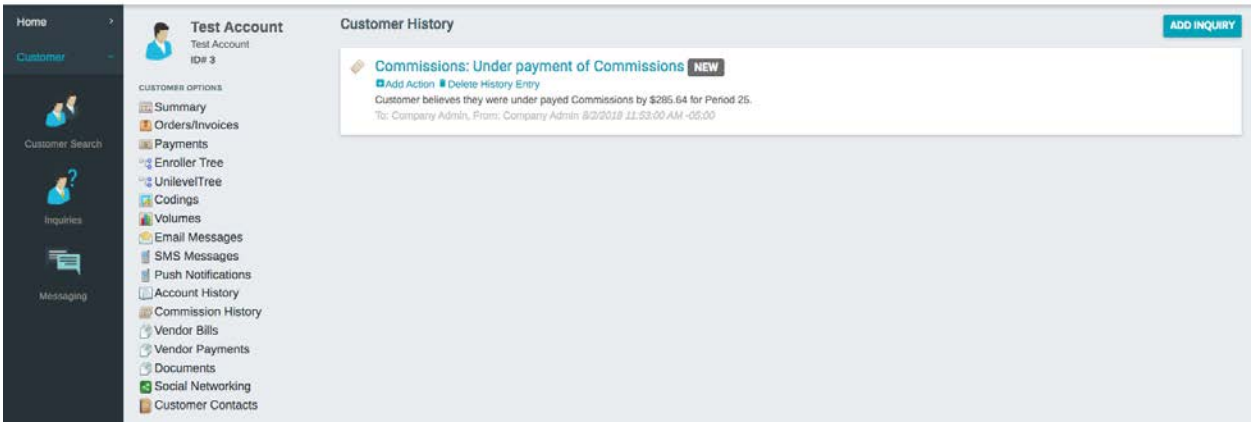
1. Log in to Exigo.com.
2. To set up a New Action Tracking Entry a/k/a New Inquiry, Go to the Customer Record of the associated Customer.
3. Go to Customer > Customer Search > Click on the Appropriate Customer > Account History.



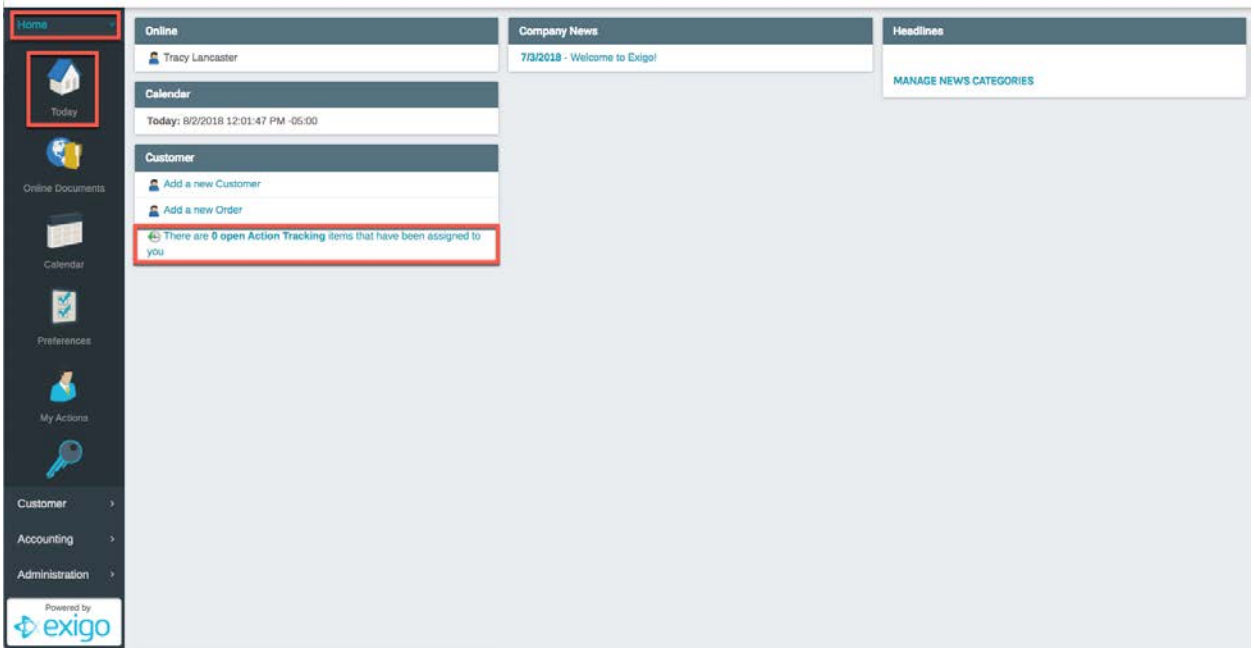
4. This screen will show any existing Action Tracking Items for this Customer.
5. To Add a New Action Tracking Item a/k/a Inquiry, Click “ADD INQUIRY”.



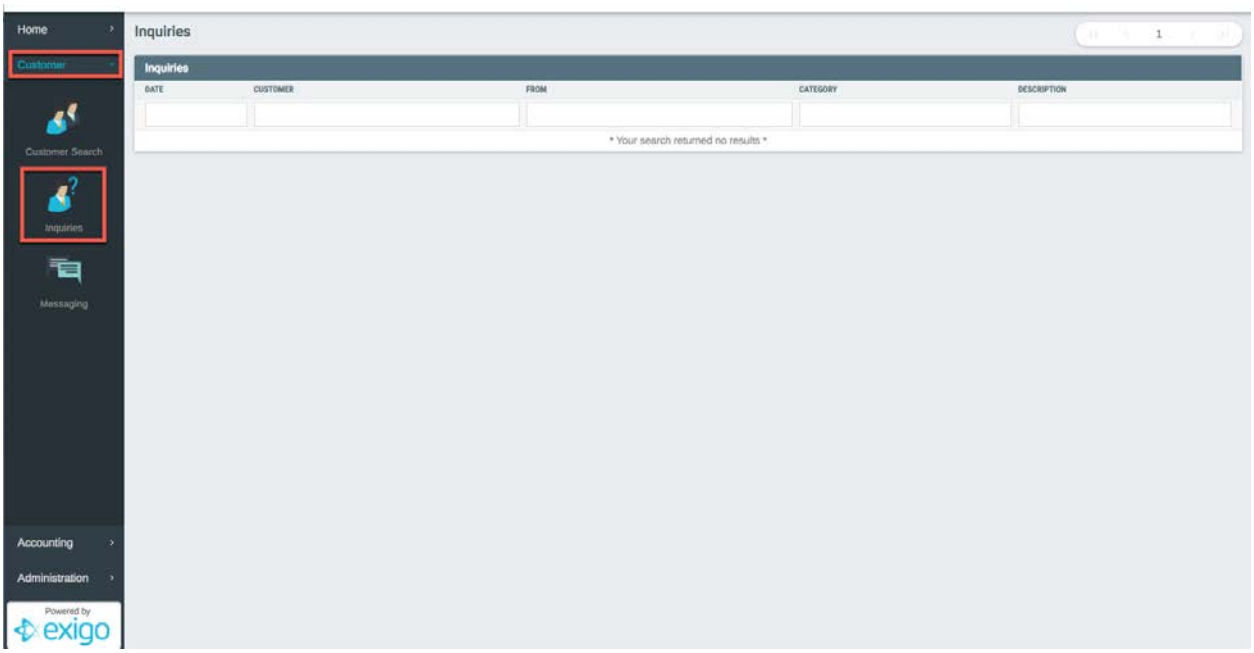
6. Review the following fields:
    a. Customer ID = Automatically populated by System
    b. Customer Name = Automatically populated by System
    c. Category = Select the Action Tracking Category relevant to this entry
    d. Assigned To = Select the User who will own this Inquiry. This is the User 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.
7. Click “ADD INQUIRY”.
8. The Inquiry will be displayed like this:



9. 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



10. From this point, Inquiries may be updated as needed – including the status. When the Inquiry has been resolved, the Status should be updated to Solved.