

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".



Home >	Test Account	Customer History	Secure https://v5live.r	ADD INQUIRY	
Customer	ID# 3	There are no history in	Customer Histor		
<u> </u>	CUSTOMER OPTIONS Summary Orders/Invoices		Customer ID	2	
Customer Search	Enroller Tree		Customer Name	Test Account	
inquiries	Codings		Category	(General) ¥	
1	Email Messages SMS Messages Push Notifications		Assigned To	Company Admin	
Messaging	Commission History			8 PRINT	
	Vendor Payments Documents Concernents		Description	Onicoponn -	
	Customer Contacts		Detail	Densi	
			Status	OPEN 💌	
Acception			Reference	References	
Administration >					
				CANCEL 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:

Home >	Test Account	Customer History	ADD INQUIRY
Customer -	ELEXACCOUNT ID# 3 CUSTOMER OFFICINE Summary	Commissions: Under payment of Commissions NEW BAd Actors # Device History Erny Customer believes they were under payed Commissions by \$395.64 bit Pierced 25. Th: Campany Admin. Fram: Company Admin BC/R028 11.53500 AM -05.00	
	Payments		
2	Codings		
Inquiries	Volumes		
喧	SMS Messages		
	Push Notifications		
	Commission History		
	Vendor Payments		
	Social Networking		



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

Home	Inquiries	Inquiries					
Customer	Inquiries						
	DATE	CUSTOMER	FROM	CATEGORY	DESCRIPTION		
<u></u>							
Gustomer Search			* Your searc	h returned no results *			
Inquicies							
Accounting Administration							

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.