CUSTOMER SERVICE

CONTACT CENTER: FOLLOW-UP TASKS

Provides guidance for locating personal Follow-Up Tasks through the Follow-Up Tasks report.

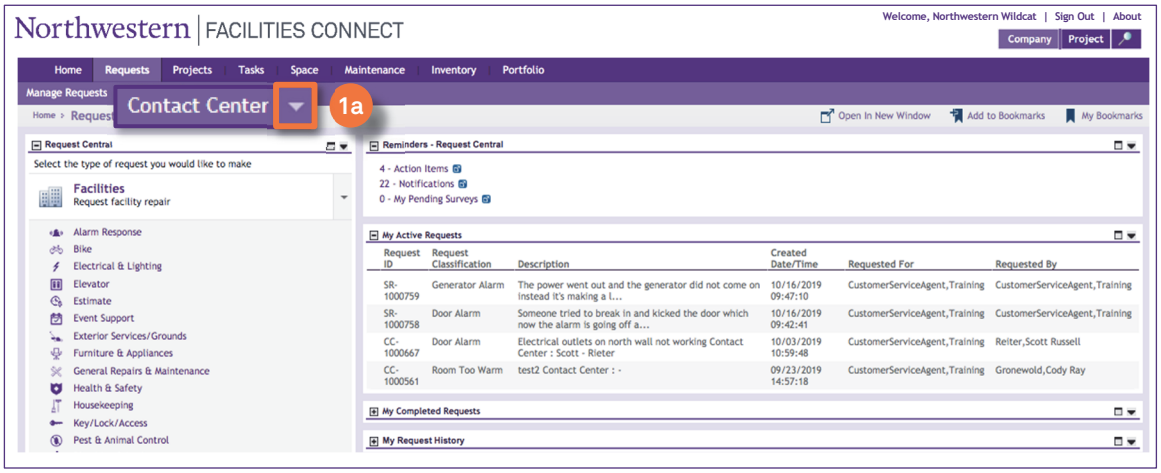
▼ INFORMATION

When creating a new **Service Request** from **Contact Center**, each Customer Service Agent will have the option to create a **Follow-Up Task**. A **Follow-Up Task** is an automatic follow-up reminder (to the authoring **Customer Service Agent**) regarding the **Service Request** and/or resulting **Work Task**.

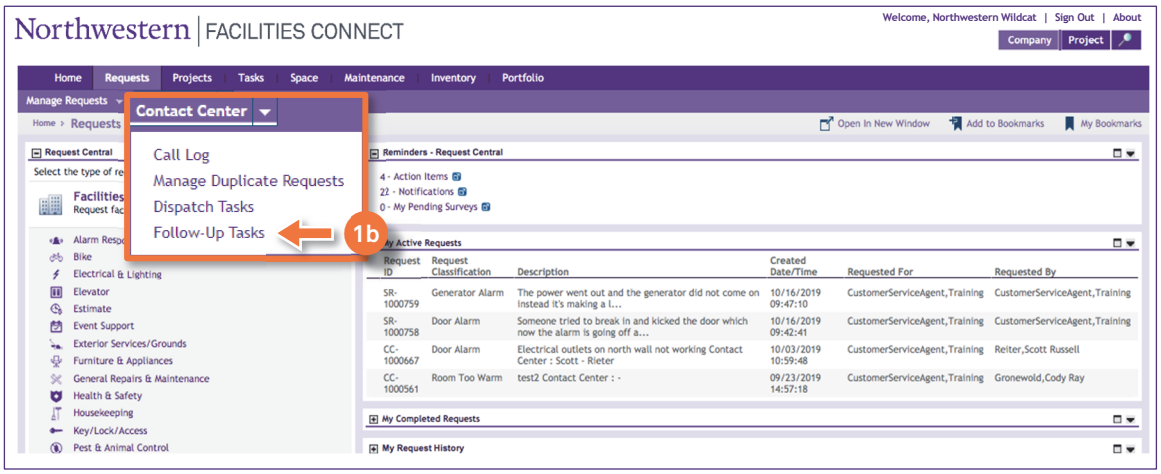
DIRECTIONS:

1 To access your personal list of **Follow-Up Tasks** from the **Requests** tab, locate the sub-menu option for **Contact Center**.

1a Click on the dropdown arrow immediately to the right of the **Contact Center** option.



1b Next, click on **Follow-Up Tasks.**



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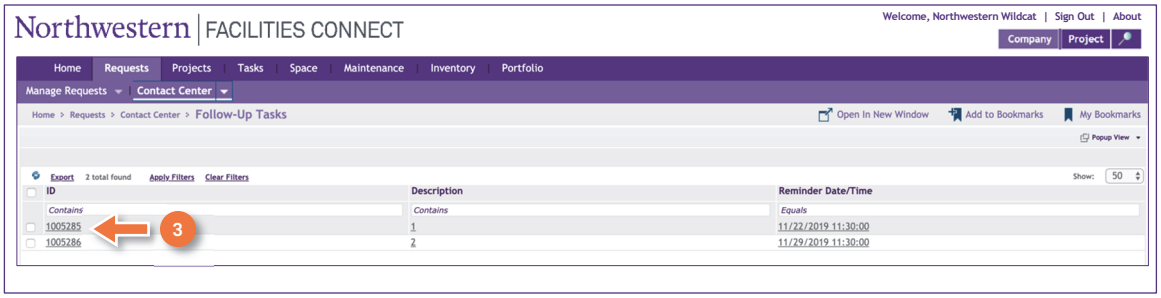
DIRECTIONS:

3 To view **Follow-Up Task** details:

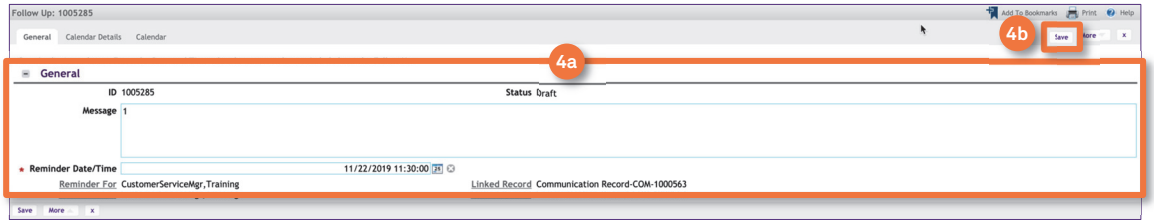
3 Click on the **Follow-Up Task ID** you wish to view.



4 Upon clicking, the **Follow-Up Task** record will open in a pop-up window:

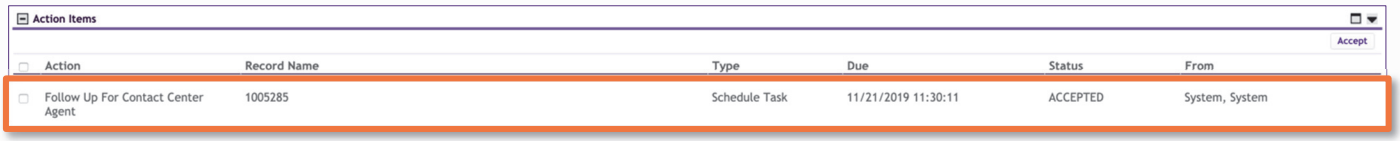
4a Review details of the **Follow-Up Task**.

4b If any edits are made, click the **Save** button. Then **X** to close.



▼ INFORMATION

On the **Reminder Date/Time** of the **Follow-Up Task**, the **Follow-Up Task** will appear in the **Reminders – Request Central** section of the **Home Page** under **Action Items**.



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