Activities

What is a New History?

AÂ New History is exactly as it sounds.Â It means you are making a new historical note based on either a call, a to-do or an email.

New History should be used for a customer when 1 of the following occurs:

1. When the customer calls you and does not have a scheduled activity for you to clear.
2. A New Customer calls and you need to make a History.
3. You make an error on the Clear Activity and need to create a history
4. If you get a call transfer from the office staff about a customer and there is no scheduled activity that you have permission to clear.

To learn how to make a new history click here >>> How do I make a New History for a customer?

Attached files:

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URL: https://staff.iconic.productions/KB/content/0cat=37/182/en/what-is-a-new-history.html