share one

NewSolutions

Contact Management

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NewSolutions

Rel 9.2.5

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Introduction

The NewSolutions ***Contact Management*** platform is now updated and enhanced to provide a more effective and efficient internal communication tool for credit unions using our NewSolutions system. ***Contact Management*** offers managers and employees a centralized location to enter, assign, track, update, and follow up on tasks (referred to as “threads” and “entries”) to be performed at the credit union.

This platform is designed for versatility, utilizing customizable queues and categories to assign and classify incoming, new threads. Additionally, **File Maintenance**, **Inquiries**, and **History** platforms are integrated to allow users to view and edit member data, and the **Imaging** platform is integrated to allow documents to be saved in a specific thread and into the member’s profile. Reminder notifications are available to be enabled within Contact Management as an additional follow-up tool.

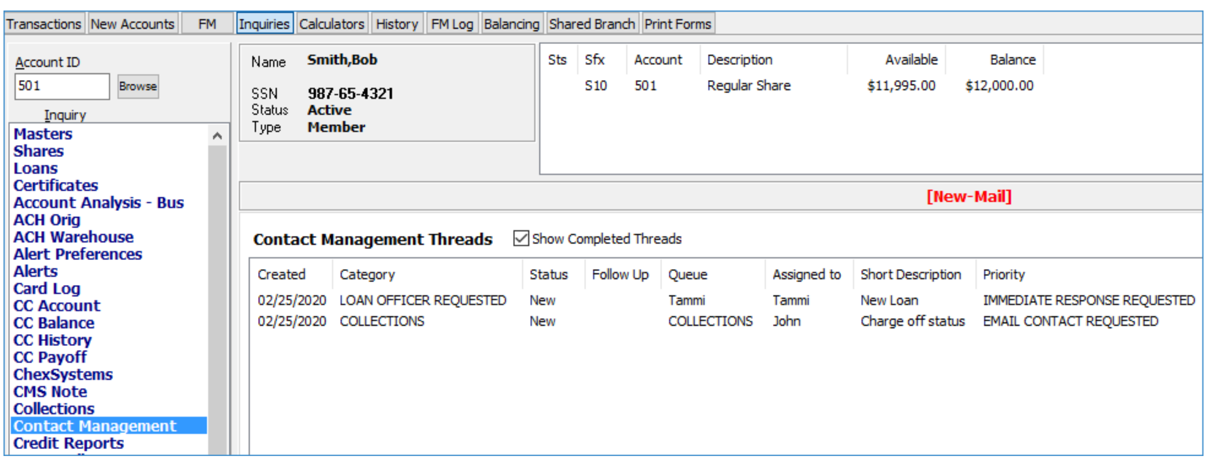
This documentation contains a detailed overview of Contact Management’s functionality along with step-by-step setup instructions.

Contact Management Platform Access

The Contact Management Platform can be accessed from the Main NewSolutions Menu or within Teller Platform, Inquiries.

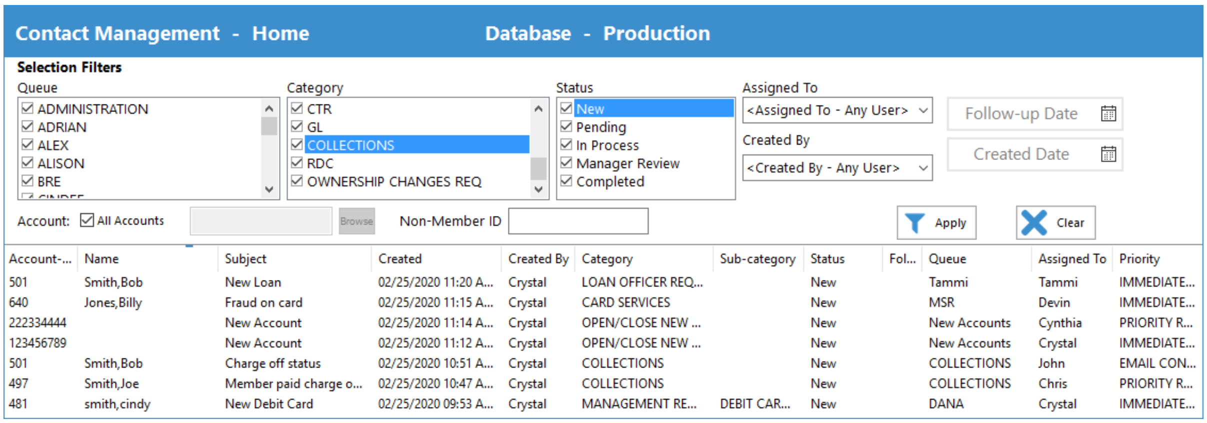
Main Menu

Teller Platform – Inquiries Tab



Contact Management – Home

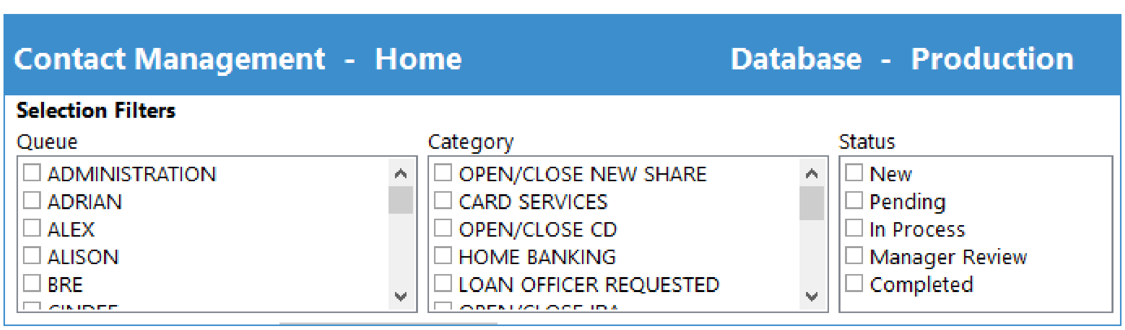
The main screen displays as **Contact Management Home** offering a selection of filters to create a list of members with contact management threads and entries (notes).



The credit union will customize the Contact Management Settings for all the filter menu options that are available on the Home Screen. The **Selection Filters** include *Queues, Categories, Sub-categories, Status, Assigned To, Created by, Follow-up Date, Created Date, and Account Searches*. These default filter options will load according to the administrative set up by the credit union.

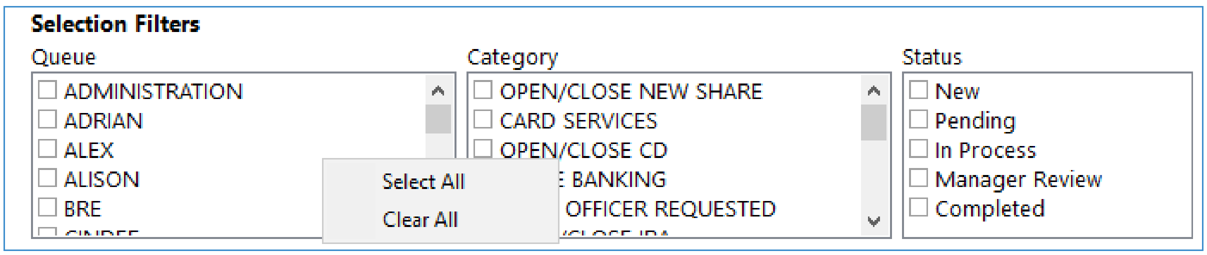
Selection Filters

The **Contact Management Home Screen** will appear with the **Selection Filters** located at the top of the screen. The **Queue**, **Category**, and **Status** filters are required to retreive threads.



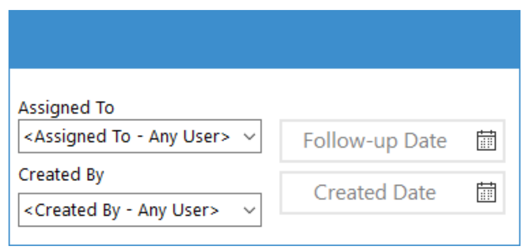
How to Create Filters to Retreive Threads

1. Select a filter(s) by clicking the flag next to the filter option or select all filters by right-clicking in the **Selection Filters** Box and chose *Select All*.

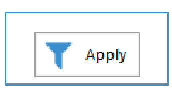


The *Select All* option is available in the Queue, Category, and Status Filter Boxes. To remove the *Select All* filter, right-click again in the filter box and select *Clear All*.

2. Optional filters available: Assigned To, Created By, Follow-up Date, and Created Date.



3. Click **Apply**.

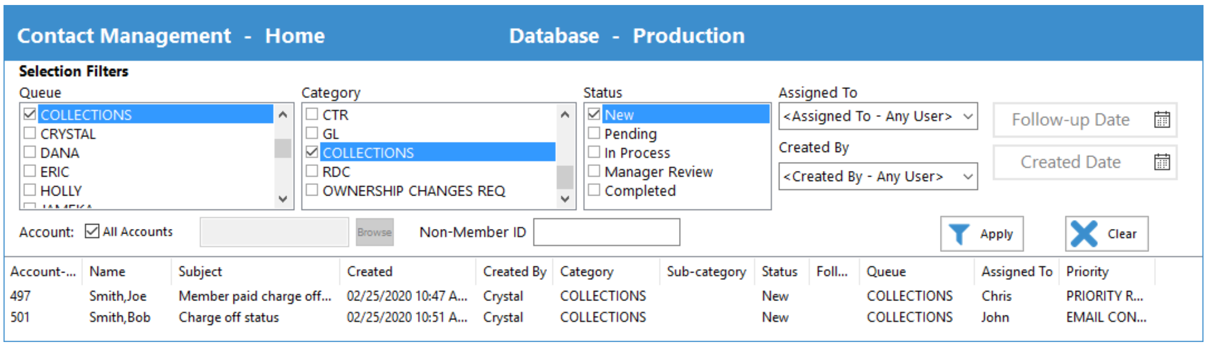


Thread Filter Results

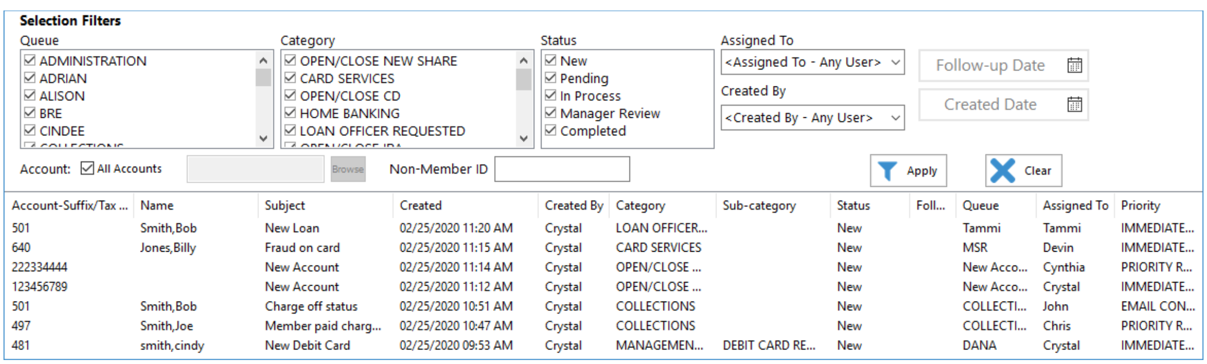
The filters for **Queue**, **Category**, or **Status** can indivdually selected or use a ***Select All*** option by right-clicking inside the **Queue**, **Category**, or **Status** box. The filters can also be cleared by right-clicking and selecting ***Clear All***.

Select a thread to view or edit in the list by double-clicking the thread.

Example: Filter results based on individually selecting the options in **Queue**, **Category**, and **Status**.



Example: Filter results based on the *Select All* option for **Queue**, **Category**, and **Status**.



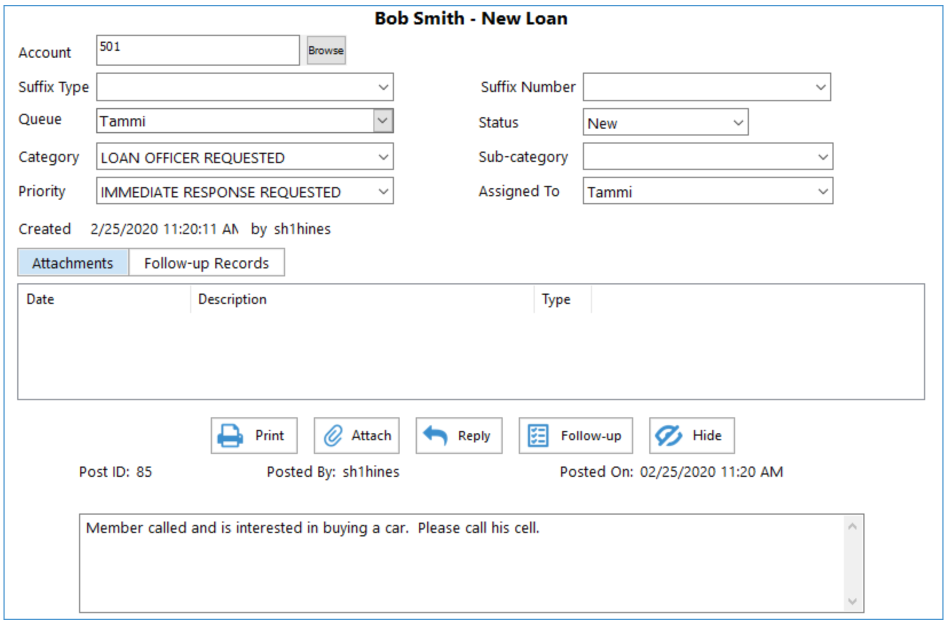
Note: The columns can be sorted by clicking on any header. The system is flexible to allow the user to customize their view. The sort column chosen will stay sorted until the Contact Management Platform is closed.

How to Add a Reply Entry to a Thread Message

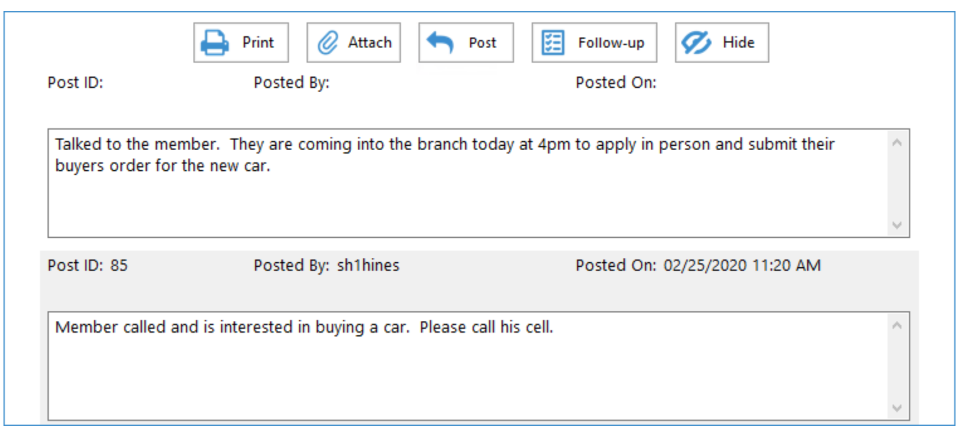
1. Double-click on the **Thread**.

Accou...	Name	Subject	Created	Created By	Category	Sub-category	Status	Foll...	Queue	Assigned To	Priority
501	Smith,Bob	New Loan	02/25/2020 11:20 AM	Crystal	LOAN OFFICER...		New		Tammi	Tammi	IMMEDIATE...

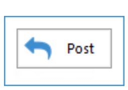
2. Click on **Reply**.



3. Type the reply message (entry note) into the new thread message box.



4. Click **Post**.



Queue

The Queue filters are defined by the credit union. Queues can be selected by clicking into the box to flag the option. In addition, right-click in the Queue box and discover two other options: Select All and Clear All. This will provide a fast and easy way to filter for all queues or clear out any selections to restart the process of Queue filtering to review threads.

Category

Each **Category** listed will represent the main reason(s) that a thread or entry would be created. The categories should cover any and all general topics. These categories are defined by the credit union. There are sub-categories that can be defined to add more specific categories of a thread.

Status

There are three types of **Status** types. Status can be selected to review New, In Process, and Completed threads. These options can be customized by the credit union.

Threads

A thread is an electronic message in Contact Management that includes the initial post and all replies or entries connected to it. This is an efficient way to communicate between credit union staff about servicing the members. Once you create a New Thread, entries or notes can be added at any time. One thread can have several replies or entries that are visible to the user. The Thread will update at pre-defined intervals (10 seconds +) set by the user in **User Settings.**

Reply Entries

A **Reply** is a note or entry added to the initial electronic message called a Thread. There is a box available to type the entries or notes to add to the thread. Once you complete the entry, you must click the **POST** button to save the entry message.

New Thread

New Threads can be created in one of three ways: **New Thread** icon, **Thread** menu option, or type **Ctrl + N** on the keyboard.

Create a New Thread for a Member or Associate

1. Click the **New Thread** button located at the top right corner of the Home screen.

   or

   Select **Thread** located in the left side menu of the Home screen.

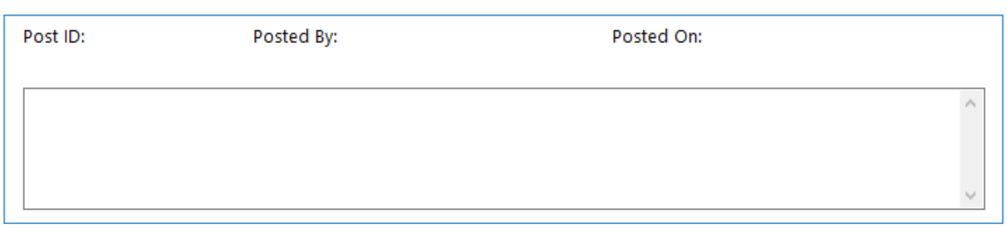
   or

   Press CTRL + N on the keyboard on the Home Screen.

2. Complete the **Thread** fields in the **New Thread Entry Box**.

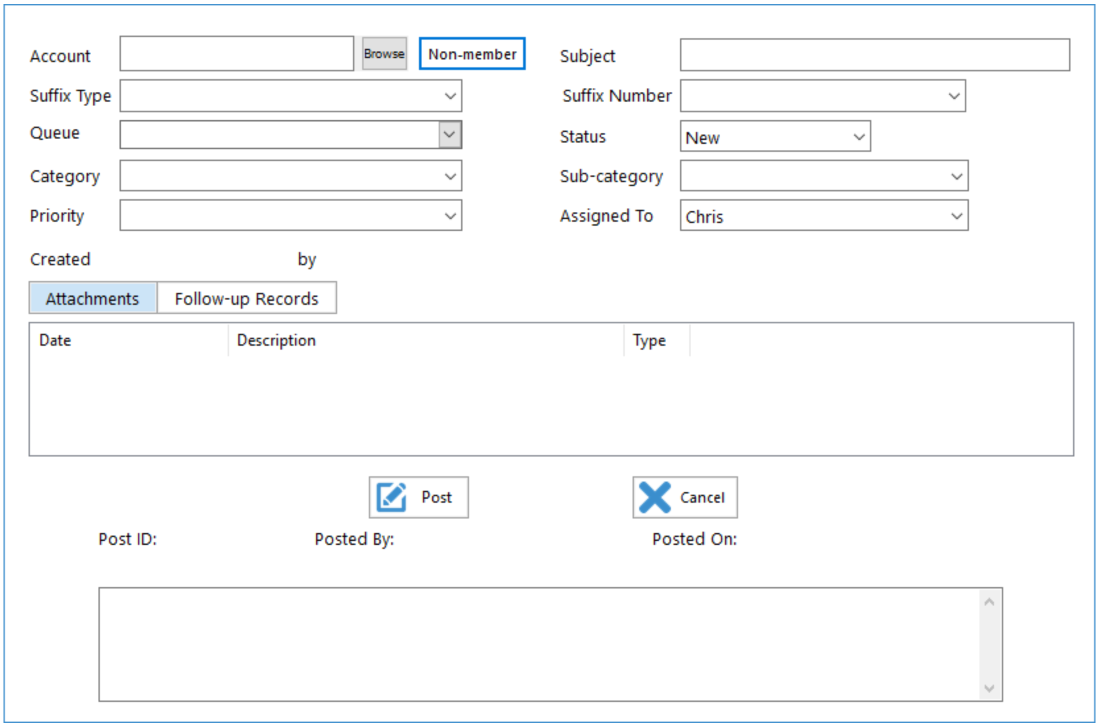
   Begin completing the fields by entering the **Account Number** or **Browse** to search for the member or associate in the NewSolutions system. The Queue, Status, Category, Priority, and Assigned To drop-downs must be completed. The Subject fields as well as the Suffix Type, Suffix Number, and Sub-category drop-down menus are optional. However, if you enter a selection in the Suffix Type drop-down menu, you must also enter a selection in the Suffix Number drop-down menu.

3. Click into the Thread Message box to enter the message.



4. Click **Post.**

New Thread Entry Box for Members or Associates



The New Thread Entry Box has several fields with drop-down menus to customize your new Contact Management thread message. There are only two fields that pre-fill automatically: *Status* (New) and *Assigned To* (User's name). All fields can be modified to create your new thread entry.

The system will allow you to tab to various fields. Also, the screen can be stretched and will auto-center to find the optimal view of Contact Management.

The New Thread allows you to define the message by the *Account Number*.

Choose *Account* number only (no suffix), if the thread is being create at the master level for the member. If you select the optional fields of *Suffix Type* and *Suffix Number*, then the thread will appear and list the associated account including the suffix.

Note: There will be a menu option to select loan applications by the system generated App IDs.

Select a *Category* for the thread. There is an optional field to select a *Sub-Category.*
Select the person to assign the thread message to from the drop-down menu. This is based on the credit union staff that will receive threads. This list is defined by the credit union. The default is the user creating the thread message. This can be modified.

Priority is a required field. The drop-down options are defined by the credit union.

How to Create a New Thread for a Non-Member

1. Click the **New Thread** button located at the top right corner of the Home screen. 

   or

   Select **Thread** located in the left side menu of the Home screen. 

   or

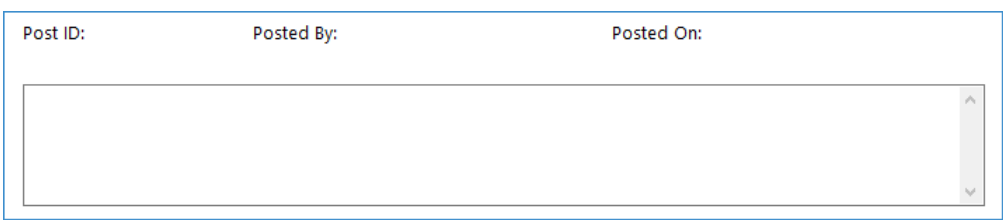
   Press CTRL + N on the keyboard on the Home Screen. 

2. Click the **Non-Member** button.

3. Complete the **Thread** fields in the **New Thread Entry Box**.

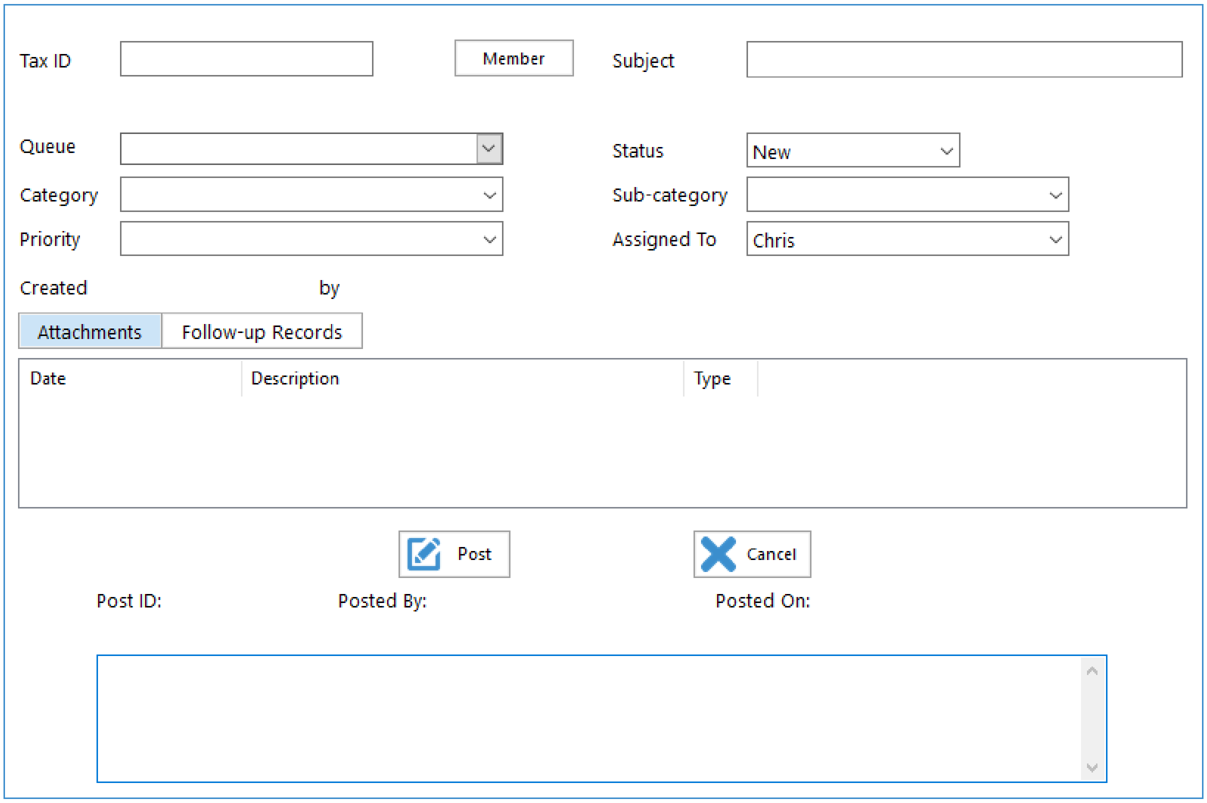
   Begin completing the fields by entering the **SSN/ITIN/EIN** for the non-member that has no profile created in NewSolutions. The Queue, Status, Category, Priority, and Assigned To drop-downs must be completed. The Subject field and Sub-category drop-down are optional.

4. Click into the Thread message box below to enter the message. Be sure to include the person's name and contact information in the thread message.



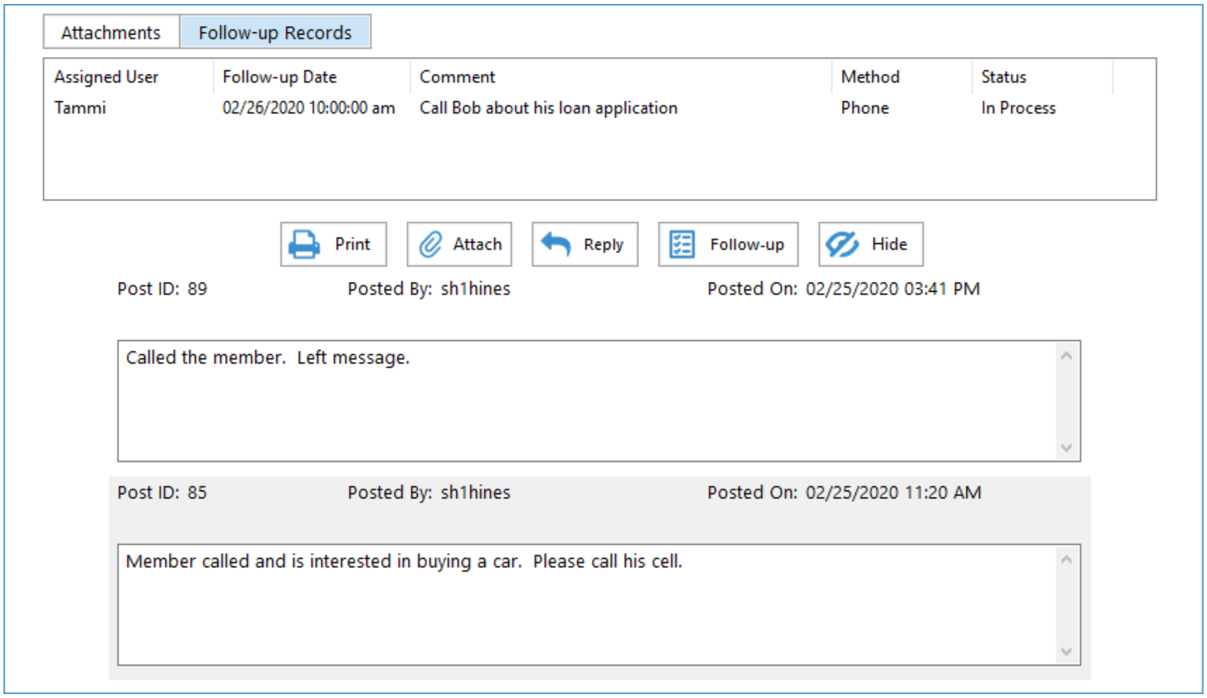
5. Click **Post.**

New Thread Entry Box for Non-Members



Follow-up Records

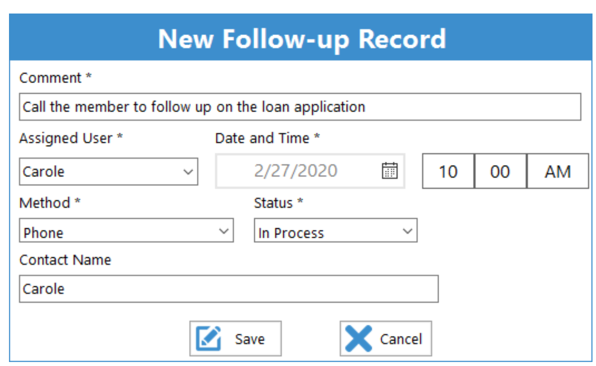
Follow-up Records are entries created in a new or existing **Thread** by the user as task reminders to follow up on a set date and time. The system allows multiple follow up records to be created for the **Thread**.



How to Create a Reminder Follow-up Record

1. Create the new **Thread** or search an existing **Thread**.
2. Click on the **Follow-up** button 

in the center of the **Thread** box or right-click in the **Follow-up Records** Box and click *Follow-up*.
3. A **New Follow-up Record** Box will appear, then complete the fields to set up the reminder.
4. Click **Save**.



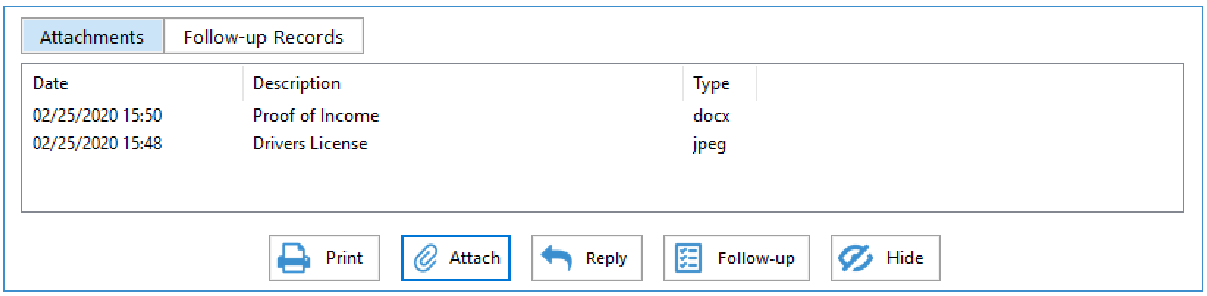
Attachments

Documents are saved to the **Thread** and loaded into the member's imaging profile in NewSolutions using the **Attachments** button.

How to Add an Attachment

1. Click **Attachments** button to open the Imaging Box 

 or right-click in the **Attachments** Box and click *Attach*.



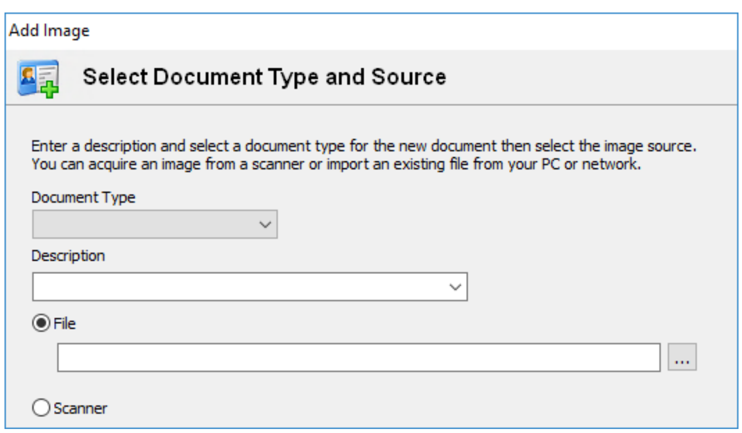
2. Choose from the *Document Type* drop-down menu.

3. Type or select *Description.*

4. Choose *File,* then click on the ellipsis ... button to retrieve a saved document from the PC. Preview the document and click *Save*.

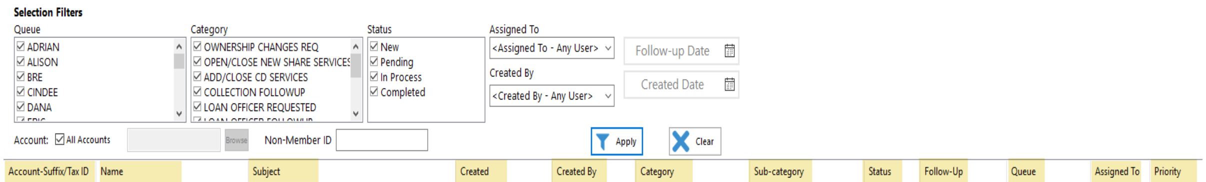
or

4. Choose *Scanner*, then select the scanner model from the drop-down menu to scan a new document into the system. Click *Next*, then load the document into the scanner. Click *Save*.



Existing Threads

The **Contact Management Home Screen** will provide a list of threads based on the filters the user choses at the top of the screen. In addition, the user can click on a column header to sort the threads in ascending or descending order based on the column header selected.



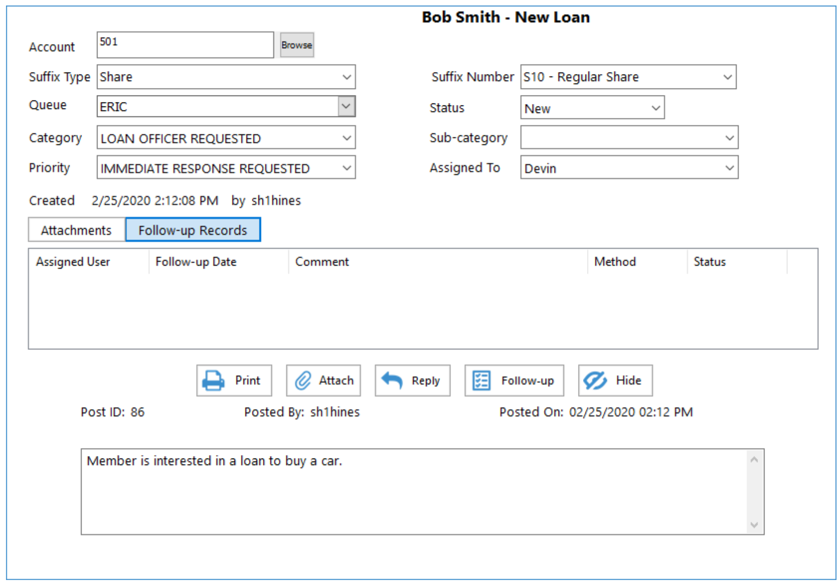
How to Search an Existing Thread

1. Select the filters for the thread search criteria.
2. Click the **Apply** button.
3. Wait for the search to complete. Watch for the spinning icon.
4. Once the search is complete, the threads will appear at the bottom of the screen. You can click on a column header to sort the threads in ascending or descending order.
5. Double-click the thread line item from the list below.

Thread Menu

The Thread Menu is a convenient tool to access **Threads** and other important information about the member, such as the entire relationship (Suffixes), Addresses, Contacts (Phone and Email), Identification, and the File Maintenance (FM Log).

- Thread
- Suffixes
- Addresses
- Contacts
- Identification
- File Maintenance



Suffixes

Sts	Sfx	Account	Joint	Description	Available	Misc
	S10	501	Owner	Regular Share	$11,995.00	

Addresses

Street Address	City	State	Postal Code	Type	Bad
516 RADAR RD	MEMPHIS	TN	38116	Physical	

Contacts

Data	Type
(601) 954-6566	Home Telephone
(603) 634-6464	Cellular Telephone

Identification

Data 1	Data 2	Type
S8009987776	MI	DriverLic

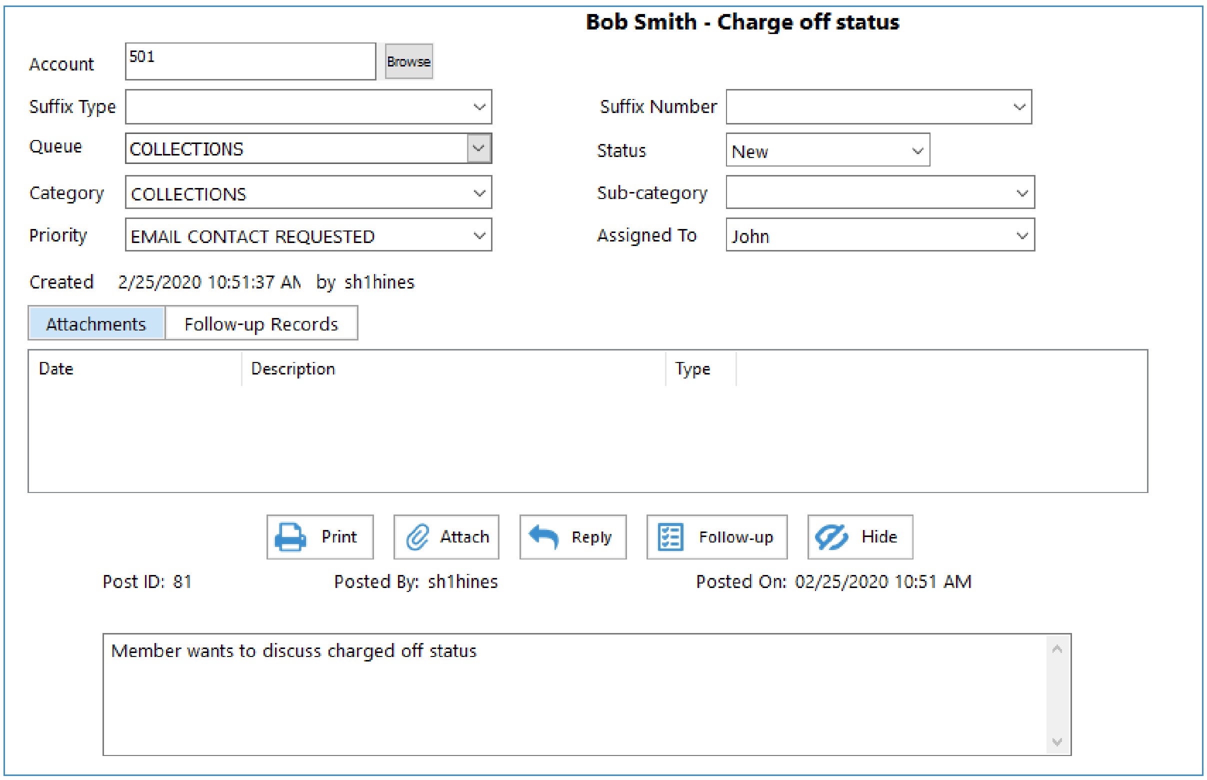
File Maintenance

Date	Action	Field	Old	New	User	Wk
02/25/2020 10:47:34	Add				sh1hines	CORDMTS03
02/25/2020 10:47:34	Change	Locked_By	User:	User: sh1hines	sh1hines	CORDMTS03
02/25/2020 10:47:34	Change	Locked_Time	<null>	2020/02/25 10:47:3...	sh1hines	CORDMTS03
02/25/2020 10:47:57	Change	Locked_By	User: sh1hines	User:	sh1hines	CORDMTS03
02/25/2020 10:47:57	Change	Locked_Time	2020/02/25 10:47:34....	<null>	sh1hines	CORDMTS03
02/25/2020 17:19:47	Change	Locked_By	User:	User: sh1hines	sh1hines	CORDMTS03
02/25/2020 17:19:47	Change	Locked_Time	<null>	2020/02/25 17:19:4...	sh1hines	CORDMTS03

Thread Hide Button

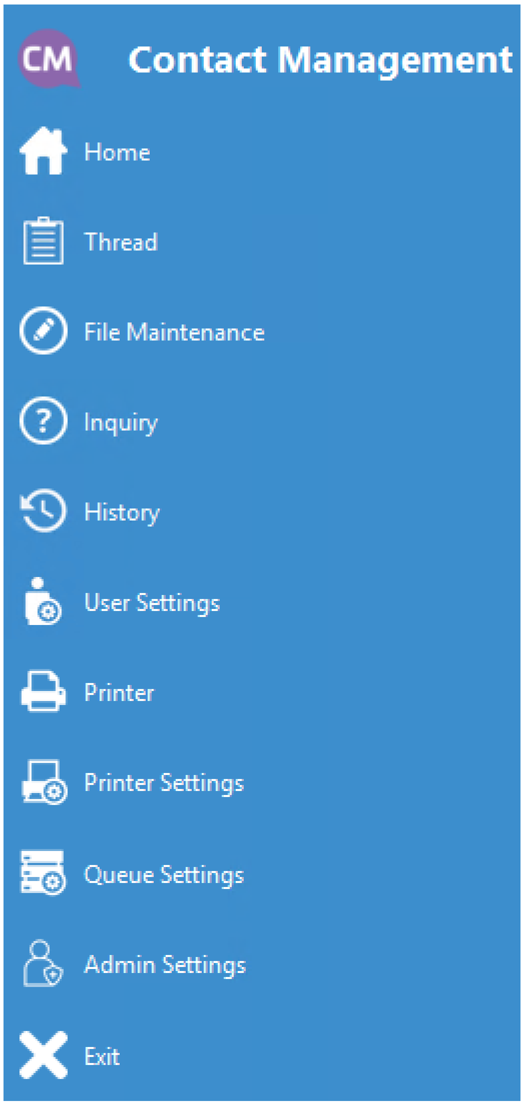
The **Hide** button in the Thread is available.

Hide will delete the **Thread** record from Contact Management. The **Thread** will not be seen in the **Contact Management Platform**, **Teller/Inquiries**, or **NSQuery**.



If you mistakenly **Hide** (delete) a **Thread** and it is imperative that it be located, it will require the credit union to call Share One to find the **Thread** in the SQL database.

Contact Management Menu



Home: Contact Management Home Screen

Thread: Create or Edit a Thread Messages

File Maintenance: View or Edit a Member's Profile

Inquiry: View a Member's Profile

History: Member's Transaction History

User Settings: Customize Your Screen

Printer: Select a Printer

Printer Settings: Edit Printer Settings

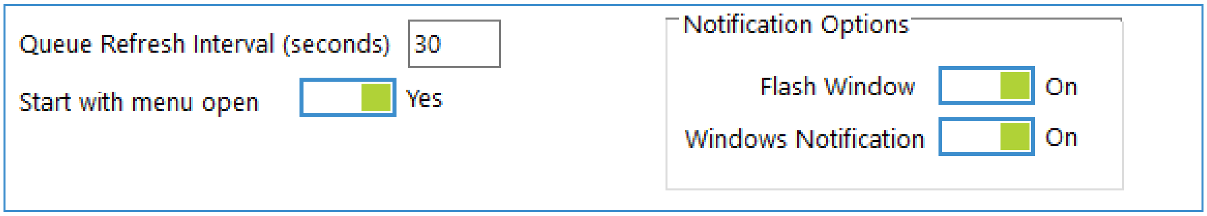
Queue Settings: Create, Edit, Delete Queues and Assign Users

Admin Settings: Customize Contact Management Platform for All Users

Exit: Exit or Close the Contact Management Platform

User Settings

The User Settings are located in the Contact Management menu. This is set by the individual user and can be modified as needed. There are 4 options: **Queue Refresh Interval**, **Start with menu open**, Notification Options: **Flash Window** and/or **Windows Notification**.



How User Customizes their Screen and Notifications

1. Queue Refresh Interval

This is an interval of time in seconds set by the user. This refreshed the users screen with current Contact Management data. This has a minimum setting of 10 seconds. This feature is set by the user.

2. Start with menu open

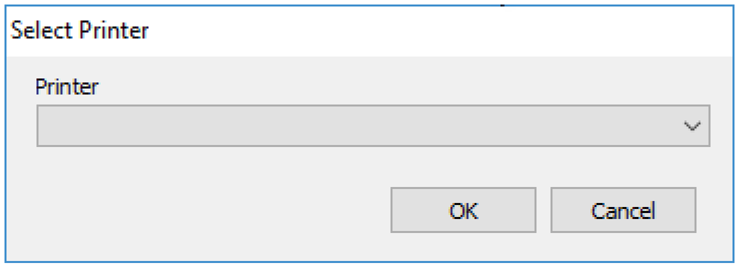
The user can choose to have the menu appear when the Contact Management Platform is selected. This can be modified at any time. The options are Yes or No.

3. Notification Options

There are two Notification options that can be set by the user. The user can select ON/OFF to receive a Flash Window Notification and/or a Windows Notification.

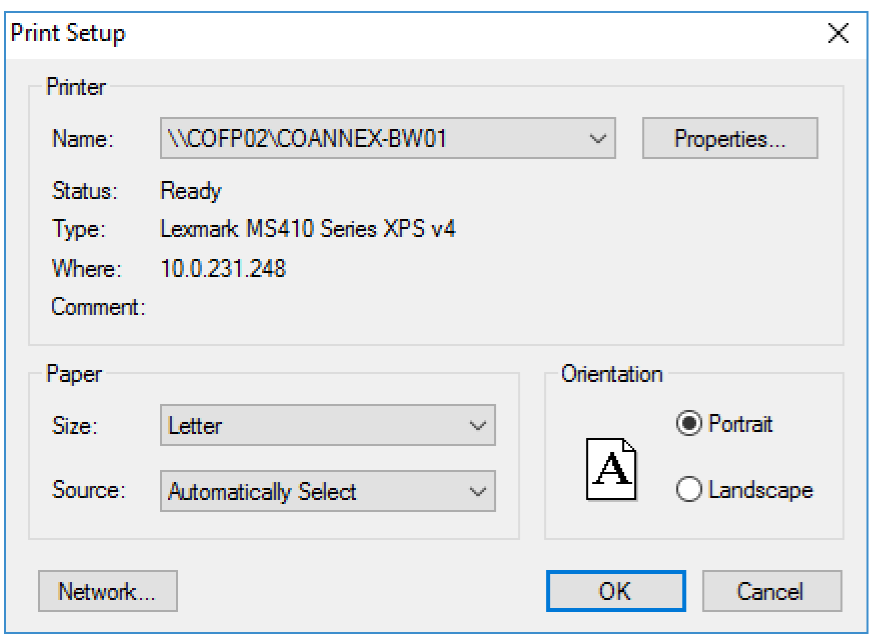
Printer

The **Printer** option on the Contact Management menu allows you to select which printer to use. Once this is set, it will not have to be reset unless a new printer or an alternate printer is needed.



Printer Settings

The **Printer Settings** will provide the basics Printer Setup options. This allows you to change the printer, paper size, orientation of the paper, and printer properties.



Queue Settings

Queue Settings are customized by the credit union. Queues are created to define the Contact Management message. The system is flexible to allow subjects, departments, and users to be created as Queues. Contact Management Administrators can add, delete, or edit Queues and assign Queue users. There is a Private option to allow a restriction on a Queue so not all users can view the thread messages created. Private means those Queues can only be viewed by the Queue Owner, Assigned Queue users, or Contact Management Admins.

Queues

Description	Default Category	Private
ADMINISTRATION	LOAN OFFICER FOLLOWUP	N
ADRIAN	HOME BANKING	Y
ALISON		N
BRE		N
CINDEE		N
COLLECTIONS		N
CRYSTAL	OPEN/CLOSE IRA	N
DANA		N
ERIC		N
HOLLY		N
JAMEKA		N
JEREMY		N
KESLIE		N
KRISTI		N
LOAN OFFICER	LOAN OFFICER REQUEST...	N
Manager		N
MSR		N
New Accounts	CARD SERVICES	N

When you select a Queue, Users are listed in two boxes: **Users Not in Queue** and **Users in Queue**.

Users Not In Queue

Alicia
Allison
Angie
Anita

Users In Queue

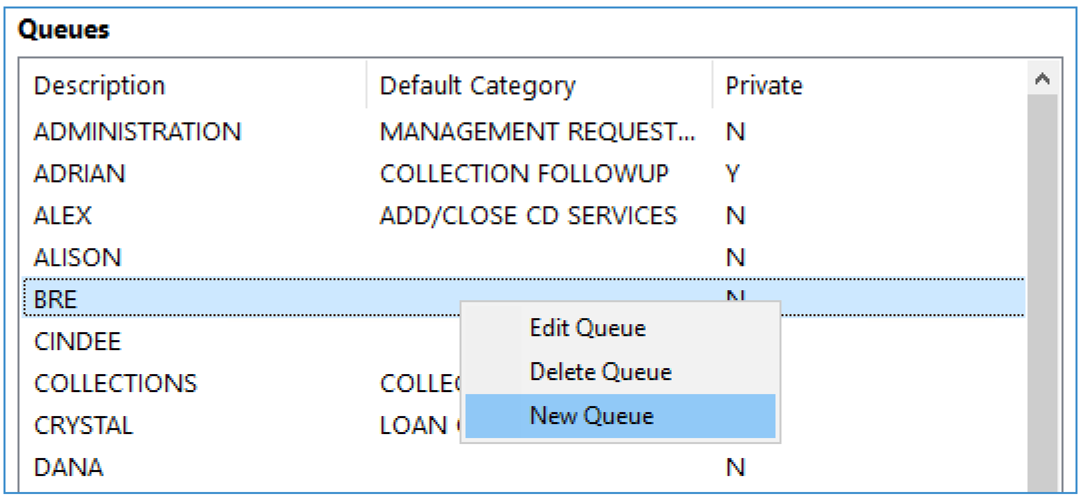
Name	Is Owner
Adrienne	No

How to Create a New Queue

Administrators can create new queues. The queue names can be created by the name of individuals, departments, tasks, or a combination. The second column in the Queues box is the Default Category. This is an optional field to be selected when creating or editing queues. Queues can be public or private. There is a Private flag to be used for the queues only seen by administrators, owners, or assigned users.

1. Click on the **Queue Settings** icon.

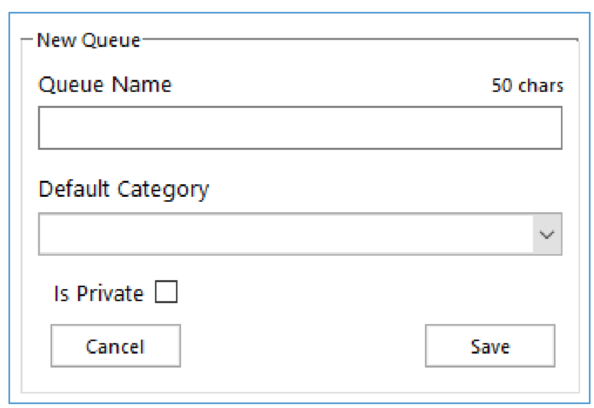
2. Right-click in the **Queues** box and select **New Queue**.



3. Give the Queue a **Name** and assign a **Default Category**, if applicable.

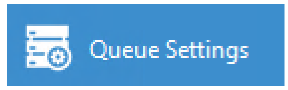
4. Assign **Private**, optional.

5. Click **Save**.



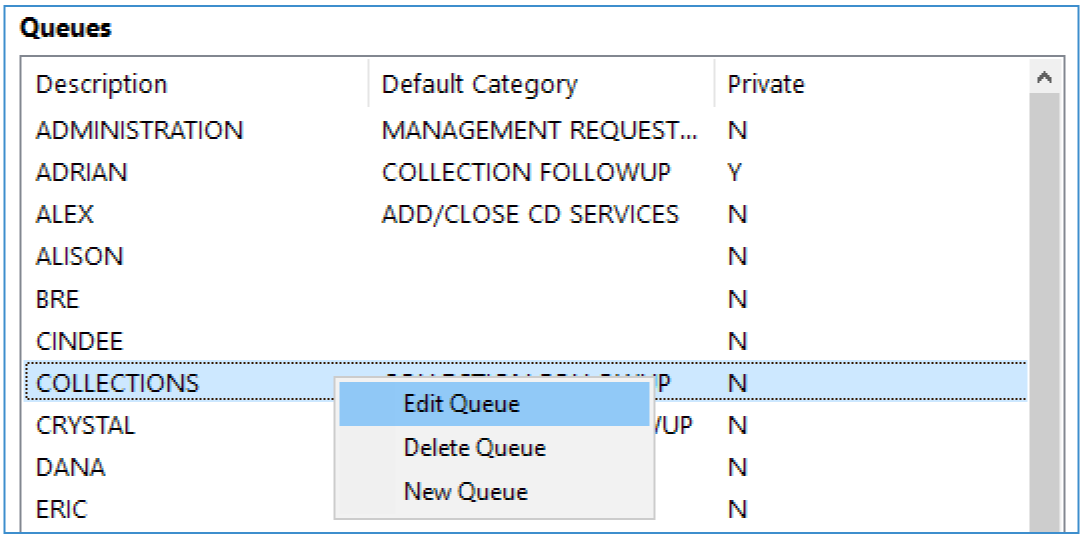
How to Edit an Existing Queue

1. Click on the **Queue Settings** icon.



2. Highlight the Queue to be edited in the **Queues** Box.

3. Right-click in the **Queues** box to view the Queue menu.

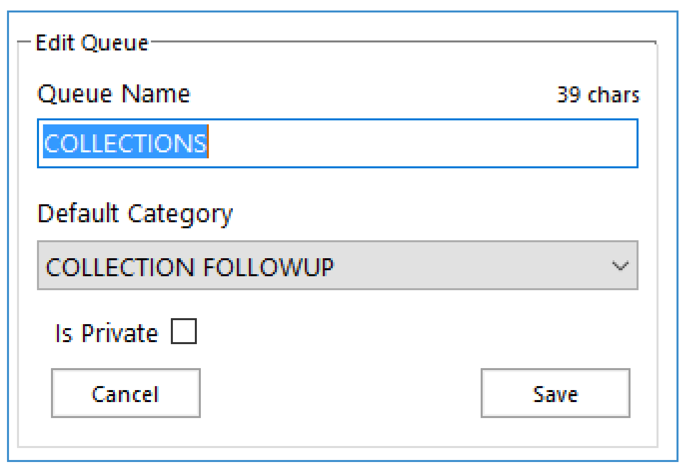


4. Select **Edit Queue**.

5. Make the necessary changes:

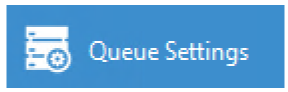
   a. Queue Name change
   b. Default Category change
   c. Mark or Unmark Private

6. Click **SAVE**.

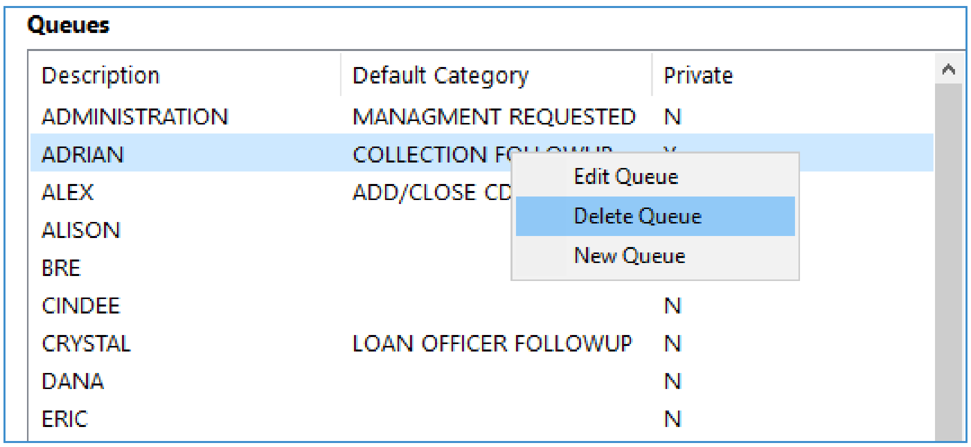


How to Delete a Queue

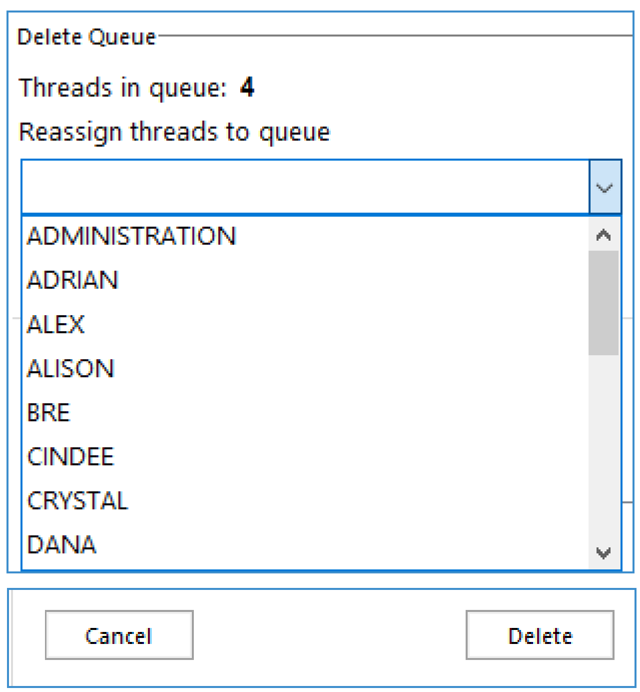
The system will not allow queues to be deleted without reassigning existing threads to another queue first. This will be a critical step prior to deleting the queue. Once a Queue has been deleted, there is not a recovery option for that Queue.

1. Click on the **Queue Settings** icon. 

2. Highlight the Queue to be deleted in the **Queues** Box.
3. Right-click in the **Queues** box to view the Queue menu.



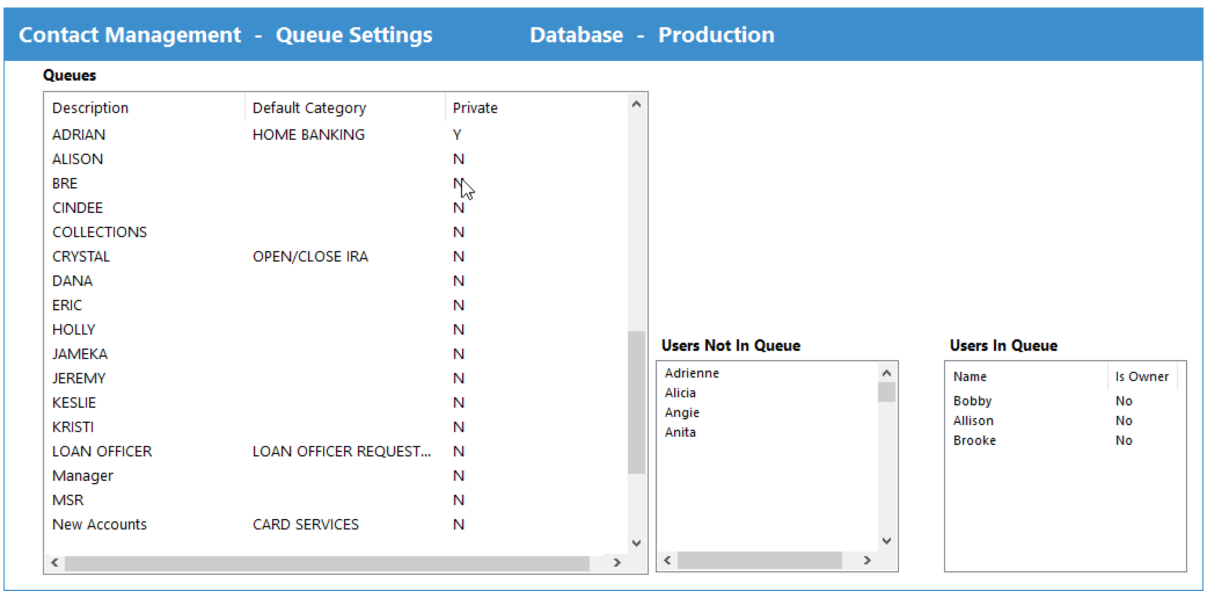
4. Select **Delete Queue**.
5. Review the **Threads in queue**.
    a. If the value is 0, then click the **Delete** button.
    b. If the value is 1 or higher, then select another queue from the drop-down menu for thread reassignment and then click the **Delete** button.



User Setup

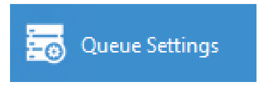
The **Contact Management Platform** will list all users that are set up in NewSolutions as active users. There are two additional columns listed on the **Queue Settings** Screen: **Users Not in the Queue** and **Users in the Queue**. Contact Management Admins can assign Queue Owners by right clicking their name in the **Users in Queue** box. Once a user is assigned an **Owner**, then that user can modify the Queue list and add other owners, as needed.

Note: Only Admins have the ability to add users to the Queue. Admins and Owners both will have the ability to assign users to be owners of a Queue.



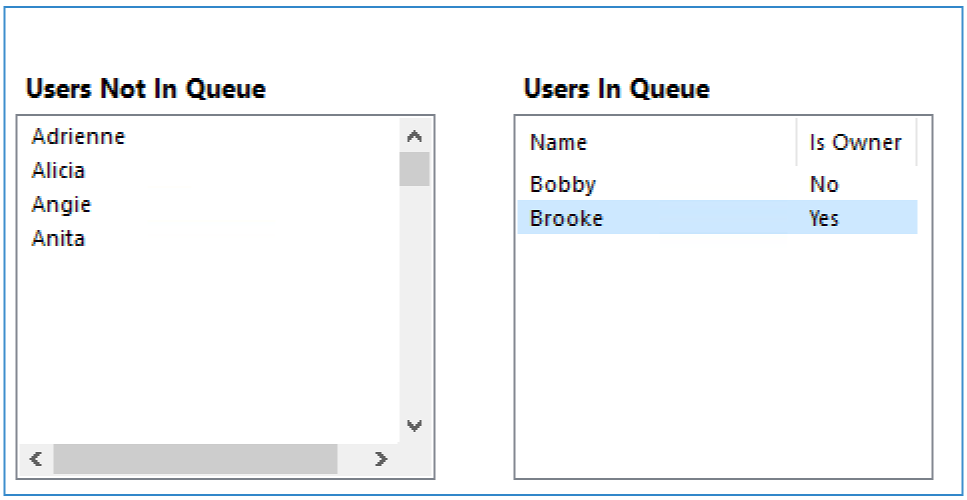
How to Add Users to a Queue

1. Click on **Queue Settings** from the Contact Management menu.



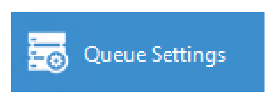
2. Highlight the **Queue** from the **Queues** list.

3. Click the user's name in the **Users Not in Queue** and drag to the next column, **Users in Queue**.



How to Make a User a Queue Owner

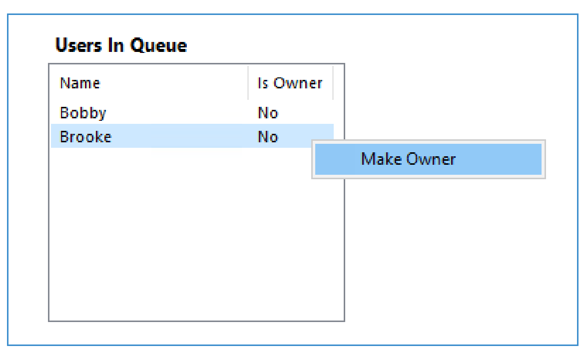
a. Click on **Queue Settings** from the **Contact Management** menu.



b. Highlight the **Queue** from the **Queues** list.

c. Right-click the user listed in the **Users In Queue** box.

d. Select *Make Owner*.

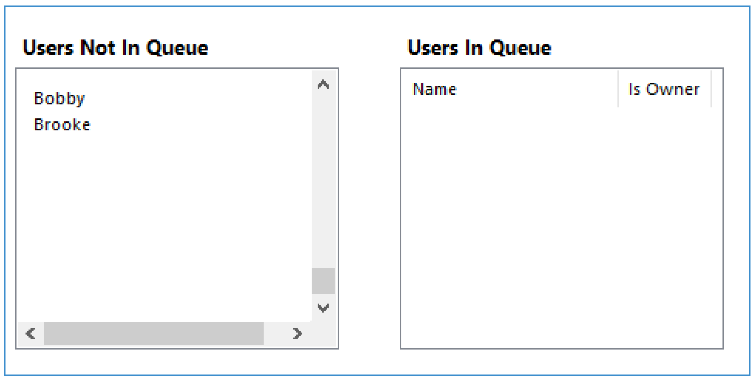


How to Remove Users from a Queue

1. Click on **Queue Settings** from the Contact Management menu.

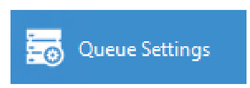
2. Highlight the **Queue** from the **Queues** box.

3. Click the user's name in the **Users In Queue** and drag to the next column, **Users Not In Queue**.



How to Revoke a User from Queue Owner

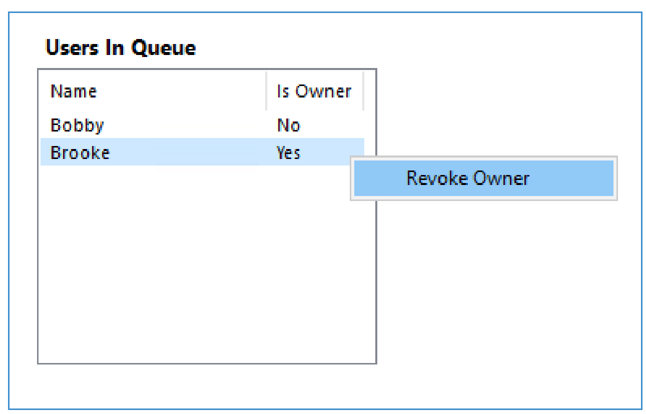
1. Click on Queue Settings from the Contact Management menu.



2. Highlight the **Queue** from the **Queues** list.

3. Right-click the user listed in the **Users In Queue** box.

4. Select *Revoke Owner*.



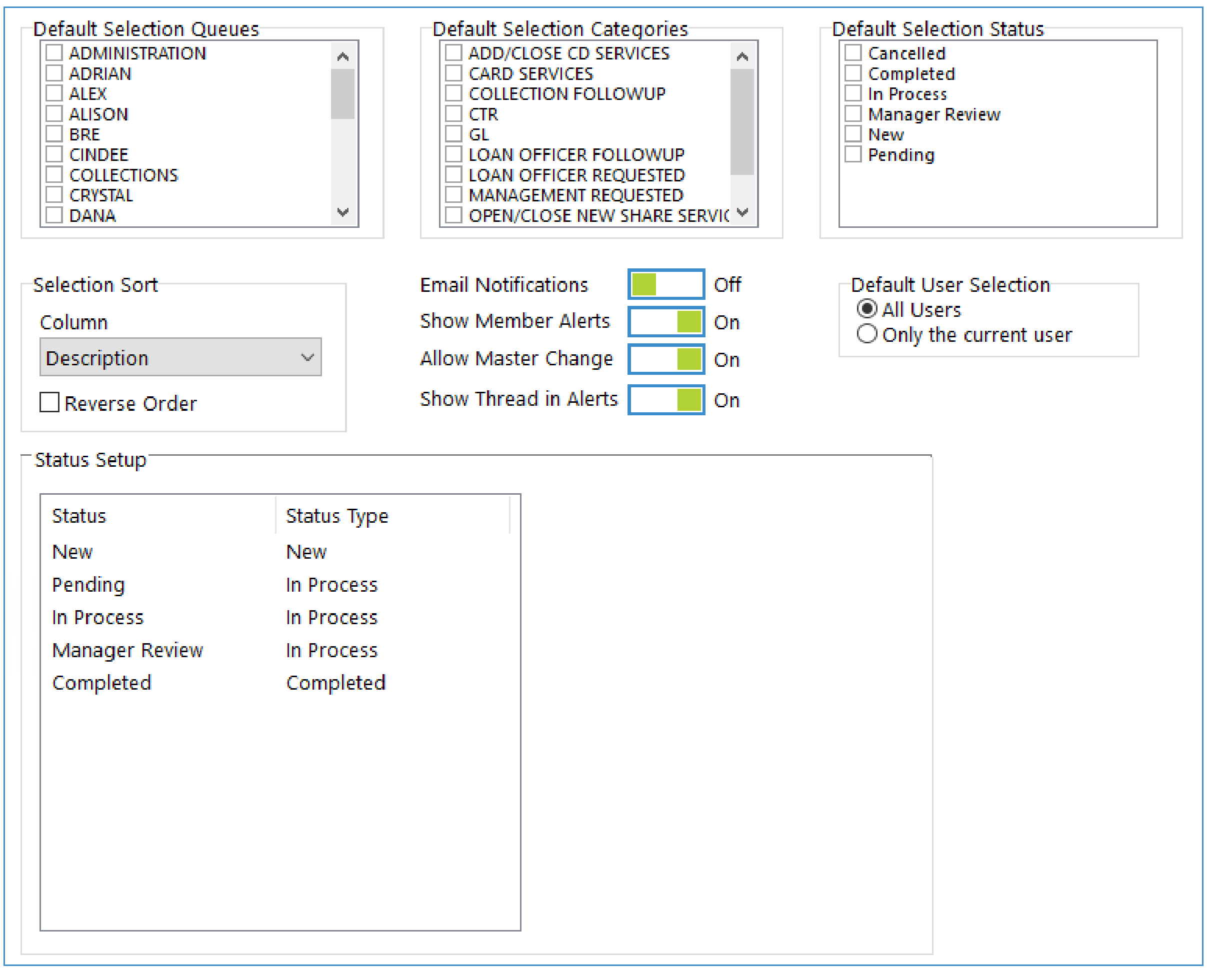
share one

Admin Settings

The Admin Settings provides Contact Management Administrators the options to customize the Contact Management Platform. The Admin users will be the only users allowed to view and make global changes to the Contact Management Platform for the credit union in the Admin Settings.

There are Default Selection options that can be customized for the credit union: Queues, Categories, and Status.

There is a Selection Sort and an option to reverse the order of the list. In addition, there are several notification/alert options that can be turned on/off. The Default User Selection and Status Setup are other customizable changes.



How to Customize the Contact Management Platform

Changes to the Contact Management Platform are performed with Contact Management in the Admin Settings located on the left menu.

1. Turn On/Off Email Notifications

The **Assigned To** user will receive an email to alert them that a thread message has been assigned to them. This is an optional feature to be determined by the credit union. Simply click the button for On or Off to make the selection.

2. Turn On/Off Show Member Alerts

The Member Alerts box can be added to the Contact Management Platform. This will prompt member alerts once a member is selected to be in a thread message. This is the same alert box that appears in the Teller Platform. This is an optional feature determined by the credit union. Simply click the button for On or Off to make the selection.

3. Allow Master Change

This option would allow anyone to make changes to the master record on a thread. This is an optional feature determined by the credit union. Simply click the button for On or Off to make the selection.

4. Show Threads in Alerts

If a thread message exists for a member, then this would allow the thread messages to appear in the Alerts Box. This is an optional feature determined by the credit union. Simply click the button for On or Off to make the selection.

5. Status Setup – Add, Edit or Remove a Status

There are options to add, edit, or remove Status Settings. This is located in the Status Setup Box. There are two columns: Status and Status Type. Changes to Status take effect immediately and there is not requirement to exit Contact Management.

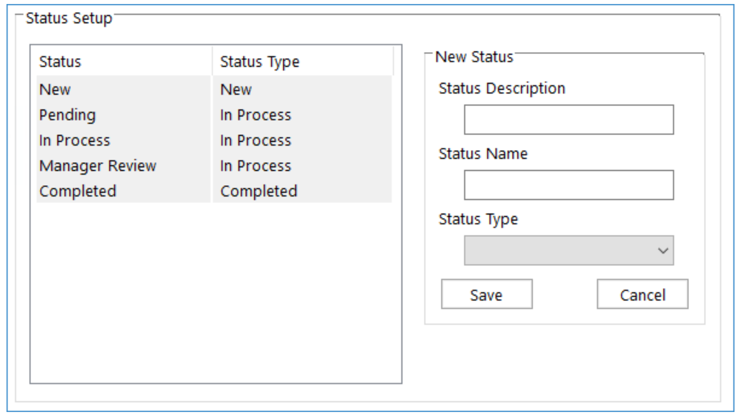
6. Default User Selection: All or Current User

This would allow the credit union to customize the Contact Management default options for all users and specifically for specific current user.

Status Setup

How to Add a New Status

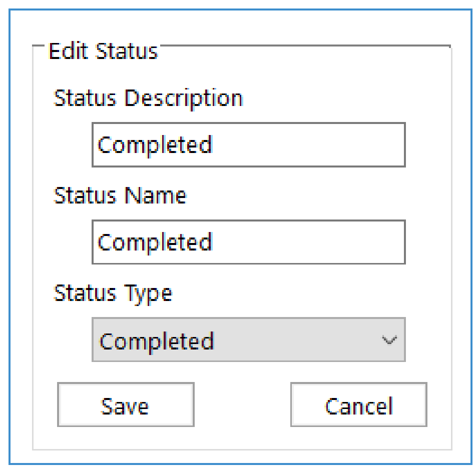
1. Right-click into the **Status Setup** Box, then select New Status.
2. Enter a **Status Description.**
3. Enter a **Status Name**.
4. Select a **Status Type** from the drop-down menu.
5. Click **Save**.



Status Modifications

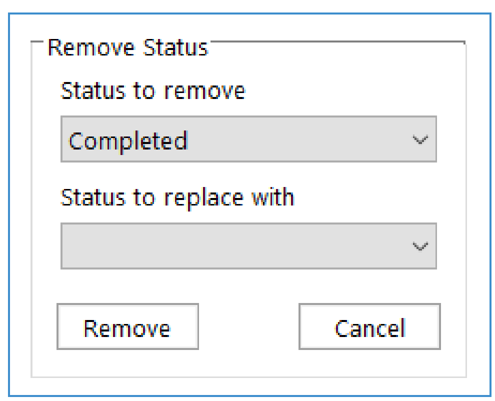
How to Edit a Status

1. Right-click on an existing **Status**.
2. Select *Edit Status*.
3. Modify the description, name and/or type field.
4. Click **Save**.



How to Remove a Status

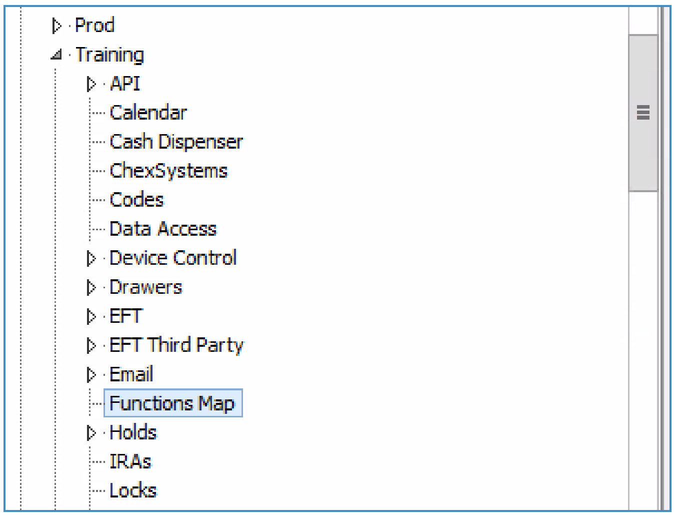
1. Right-click on an existing **Status**.
2. Select *Remove Status*.
3. Select the **Status to replace with** from the drop-down menu.
4. Click **Remove**.

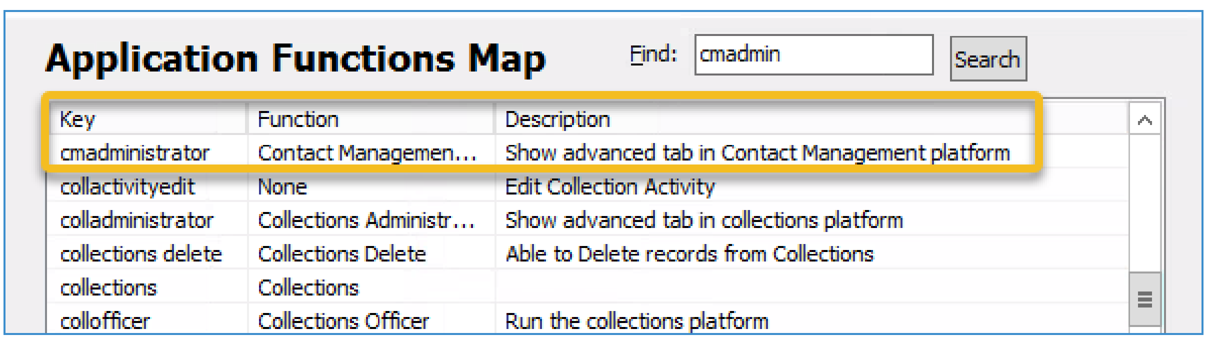


Enterprise Settings for Contact Management

Functions Map

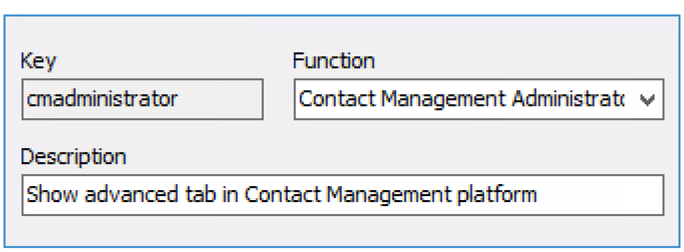
In Enterprise/Function Map there is a Key for cmadministrator. This Key must have a Function and the Function must be added to a Role. Any user who needs administrator access to Contact Management should be assigned the role.




Application Functions Map

Find: cmadmin Search

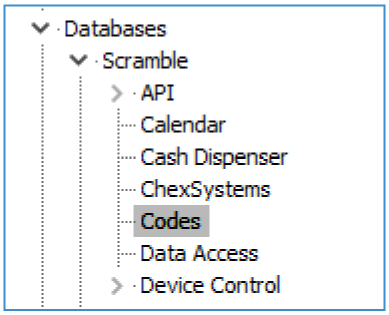
Key	Function	Description
cmadministrator	Contact Managemen…	Show advanced tab in Contact Management platform
collactivityedit	None	Edit Collection Activity
colladministrator	Collections Administr…	Show advanced tab in collections platform
collections delete	Collections Delete	Able to Delete records from Collections
collections	Collections	
collofficer	Collections Officer	Run the collections platform



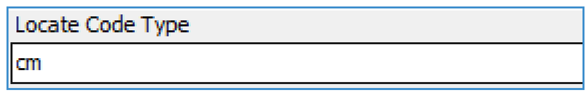
Codes

There are a few settings in Enterprise/Codes that can be modified by a System Administrator or designated user, such as: Categories, Sub-Categories, Follow Up Methods, Priorities, and CM Types.

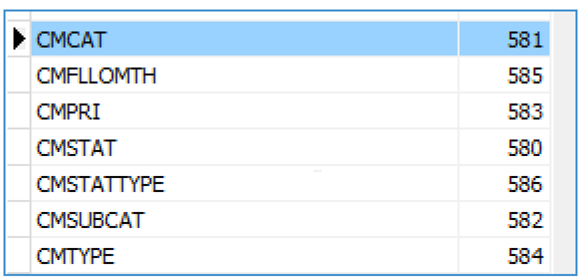
Code Tables are available in Enterprise by selecting **Codes**.



Note: A quick way to locate Contact Management Code Tables is to type CM in the Locate Code Type Box:



The Contact Management list of Code Tables:



CMCAT	581
CMFLLOMTH	585
CMPRI	583
CMSTAT	580
CMSTATTYPE	586
CMSUBCAT	582
CMTYPE	584

CMCAT	**CM Category**
CMFLLOMTH	**CM Follow up Methods**
CMPRI	**CM Priority**
CMSTAT	**CM Status (no edits)**
CM STATTYPE	**CM Status Types (no edits)**
CMSUBCAT	**CM Sub-Category**
CMTYPE	**CM Types**

Note: If you add a new code or option, remember to click *Add* and enter the **Name** (Limited characters), **Description** (the description appears in Contact Management), and a **Code** number. If you add any new "codes" or options in the lists, then you MUST choose a code number that has not been created and click **SAVE**. The system will not work if there are duplicate code numbers. Contact Share One before deleting any codes. There may be certain ones that are required for the system to work properly.

Contact Management Reports

There are a few NSQuery reports that can be created for Contact Management data.

NSQuery is located on the Main Menu of NewSolutions.

There are six Contact Management tables located within the Control Tables.

Contact_Management_Assignment	This table allows users to query on assignments made in Contact Management.
Contact_Management_Entry	This table allows user to query on entries made in Contact Management.
Contact_Management_Followup	This table allows users to query on follow-up entries made in Contact Management.
Contact_Management_Queue	This table allows users to query on queues in Contact Management.
Contact_Management_Queue_Users	This table allows users to query on user within queues in Contact Management.
Contact_Management_Status	This table allows users to query on statuses in Contact Management.

There is one Contact Management table located within the Loan Application Tables.

Contact_Management_Thread	This table allows users to query on threads in Contact Management.