

share one

NewSolutions

Contact Management



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Contact Management

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

Transactions	New Accounts	FM	Inquiries	Calculators	History	FM Log	Balancing	Shared Branch	Print Forms																								
Account ID 501 <input type="button" value="Browse"/>		Name Smith, Bob SSN 987-65-4321 Status Active Type Member		Sts	Sfx	Account	Description	Available	Balance																								
Inquiry		S10	501	Regular Share				\$11,995.00	\$12,000.00																								
[New-Mail]																																	
<p>Contact Management Threads <input checked="" type="checkbox"/> Show Completed Threads</p> <table border="1"> <thead> <tr> <th>Created</th> <th>Category</th> <th>Status</th> <th>Follow Up</th> <th>Queue</th> <th>Assigned to</th> <th>Short Description</th> <th>Priority</th> </tr> </thead> <tbody> <tr> <td>02/25/2020</td> <td>LOAN OFFICER REQUESTED</td> <td>New</td> <td></td> <td>Tammi</td> <td>Tammi</td> <td>New Loan</td> <td>IMMEDIATE RESPONSE REQUESTED</td> </tr> <tr> <td>02/25/2020</td> <td>COLLECTIONS</td> <td>New</td> <td></td> <td>COLLECTIONS</td> <td>John</td> <td>Charge off status</td> <td>EMAIL CONTACT REQUESTED</td> </tr> </tbody> </table>										Created	Category	Status	Follow Up	Queue	Assigned to	Short Description	Priority	02/25/2020	LOAN OFFICER REQUESTED	New		Tammi	Tammi	New Loan	IMMEDIATE RESPONSE REQUESTED	02/25/2020	COLLECTIONS	New		COLLECTIONS	John	Charge off status	EMAIL CONTACT REQUESTED
Created	Category	Status	Follow Up	Queue	Assigned to	Short Description	Priority																										
02/25/2020	LOAN OFFICER REQUESTED	New		Tammi	Tammi	New Loan	IMMEDIATE RESPONSE REQUESTED																										
02/25/2020	COLLECTIONS	New		COLLECTIONS	John	Charge off status	EMAIL CONTACT REQUESTED																										

Masters
Shares
Loans
Certificates
Account Analysis - Bus
ACH Orig
ACH Warehouse
Alert Preferences
Alerts
Card Log
CC Account
CC Balance
CC History
CC Payoff
ChexSystems
CMS Note
Collections
Contact Management
Credit Reports

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 screenshot shows the 'Contact Management - Home' interface. At the top, there are 'Selection Filters' for Queue, Category, Status, Assigned To, and Created By. Below the filters is a table of contact management threads. The table columns include Account, Name, Subject, Created, Created By, Category, Sub-category, Status, Fol..., Queue, Assigned To, and Priority. The 'Status' column for the first thread is highlighted with a blue background and the word 'New'.

Account	Name	Subject	Created	Created By	Category	Sub-category	Status	Fol...	Queue	Assigned To	Priority
501	Smith,Bob	New Loan	02/25/2020 11:20 A...	Crystal	LOAN OFFICER REQ...		New		Tammi	Tammi	IMMEDIATE...
640	Jones,Billy	Fraud on card	02/25/2020 11:15 A...	Crystal	CARD SERVICES		New		MSR	Devin	IMMEDIATE...
222334444		New Account	02/25/2020 11:14 A...	Crystal	OPEN/CLOSE NEW ...		New		New Accounts	Cynthia	PRIORITY R...
123456789		New Account	02/25/2020 11:12 A...	Crystal	OPEN/CLOSE NEW ...		New		New Accounts	Crystal	IMMEDIATE...
501	Smith,Bob	Charge off status	02/25/2020 10:51 A...	Crystal	COLLECTIONS		New		COLLECTIONS	John	EMAIL CON...
497	Smith,Joe	Member paid charge o...	02/25/2020 10:47 A...	Crystal	COLLECTIONS		New		COLLECTIONS	Chris	PRIORITY R...
481	smith,cindy	New Debit Card	02/25/2020 09:53 A...	Crystal	MANAGEMENT RE...	DEBIT CAR...	New		DANA	Crystal	IMMEDIATE...

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 retrieve threads.

The screenshot shows the 'Contact Management - Home' interface with 'Selection Filters' for Queue, Category, and Status. The 'Category' and 'Status' filters are expanded, showing a list of options. The 'Status' filter has the 'New' option selected.

Queue	Category	Status
<input type="checkbox"/> ADMINISTRATION	<input type="checkbox"/> OPEN/CLOSE NEW SHARE	<input type="checkbox"/> New
<input type="checkbox"/> ADRIAN	<input type="checkbox"/> CARD SERVICES	<input type="checkbox"/> Pending
<input type="checkbox"/> ALEX	<input type="checkbox"/> OPEN/CLOSE CD	<input type="checkbox"/> In Process
<input type="checkbox"/> ALISON	<input type="checkbox"/> HOME BANKING	<input type="checkbox"/> Manager Review
<input type="checkbox"/> BRE	<input type="checkbox"/> LOAN OFFICER REQUESTED	<input type="checkbox"/> Completed
<input type="checkbox"/> CINDREE	<input type="checkbox"/> OPEN/CLOSE IRA	

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*.

Selection Filters		
Queue	Category	Status
<input type="checkbox"/> ADMINISTRATION	<input type="checkbox"/> OPEN/CLOSE NEW SHARE	<input type="checkbox"/> New
<input type="checkbox"/> ADRIAN	<input type="checkbox"/> CARD SERVICES	<input type="checkbox"/> Pending
<input type="checkbox"/> ALEX	<input type="checkbox"/> OPEN/CLOSE CD	<input type="checkbox"/> In Process
<input type="checkbox"/> ALISON	<input type="checkbox"/> BANKING	<input type="checkbox"/> Manager Review
<input type="checkbox"/> BRE	<input type="checkbox"/> OFFICER REQUESTED	<input type="checkbox"/> Completed
<input type="checkbox"/> CINDEE		

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.

Assigned To	Follow-up Date
<Assigned To - Any User> <input type="button" value="▼"/>	<input type="button" value="▼"/>

Created By	Created Date
<Created By - Any User> <input type="button" value="▼"/>	<input type="button" value="▼"/>

3. Click **Apply**.



Thread Filter Results

The filters for **Queue**, **Category**, or **Status** can individually 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**.

Contact Management - Home		Database - Production									
Selection Filters		Category			Status		Assigned To			Follow-up Date	
Queue		Category			Status		Assigned To			Follow-up Date	
<input checked="" type="checkbox"/> COLLECTIONS	<input type="checkbox"/> CRYSTAL	<input type="checkbox"/> GL	<input checked="" type="checkbox"/> COLLECTIONS	<input type="checkbox"/> RDC	<input checked="" type="checkbox"/> New	<input type="checkbox"/> Pending	<input type="checkbox"/> In Process	<input type="checkbox"/> Manager Review	<input type="checkbox"/> Completed	<input type="checkbox"/> Assigned To - Any User	<input type="checkbox"/> Follow-up Date
<input type="checkbox"/> DANA	<input type="checkbox"/> ERIC	<input type="checkbox"/> HOLLY	<input type="checkbox"/> OWNERSHIP CHANGES REQ							<input type="checkbox"/> Created By - Any User	<input type="checkbox"/> Created Date
Account: <input checked="" type="checkbox"/> All Accounts		<input type="checkbox"/> Browse		Non-Member ID				<input type="checkbox"/> Apply		<input type="checkbox"/> Clear	
Account-Suffix/Tax ...	Name	Subject	Created	Created By	Category	Sub-category	Status	Foll...	Queue	Assigned To	Priority
497	Smith,Joe	Member paid charge off...	02/25/2020 10:47 A...	Crystal	COLLECTIONS		New		COLLECTIONS	Chris	PRIORITY R...
501	Smith,Bob	Charge off status	02/25/2020 10:51 A...	Crystal	COLLECTIONS		New		COLLECTIONS	John	EMAIL CON...

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

Selection Filters		Category			Status		Assigned To			Follow-up Date	
Queue		Category			Status		Assigned To			Follow-up Date	
<input checked="" type="checkbox"/> ADMINISTRATION	<input checked="" type="checkbox"/> ADRIAN	<input checked="" type="checkbox"/> ALISON	<input checked="" type="checkbox"/> BRE	<input checked="" type="checkbox"/> CINDEE	<input checked="" type="checkbox"/> OPEN/CLOSE NEW SHARE	<input checked="" type="checkbox"/> CARD SERVICES	<input checked="" type="checkbox"/> New	<input checked="" type="checkbox"/> Pending	<input checked="" type="checkbox"/> In Process	<input checked="" type="checkbox"/> Manager Review	<input checked="" type="checkbox"/> Completed
<input checked="" type="checkbox"/> COLLECTIONS											
Account: <input checked="" type="checkbox"/> All Accounts		<input type="checkbox"/> Browse		Non-Member ID				<input type="checkbox"/> Apply		<input type="checkbox"/> Clear	
Account-Suffix/Tax ...	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...
640	Jones,Billy	Fraud on card	02/25/2020 11:15 AM	Crystal	CARD SERVICES		New		MSR	Devin	IMMEDIATE...
222334444		New Account	02/25/2020 11:14 AM	Crystal	OPEN/CLOSE ...		New		New Acco...	Cynthia	PRIORITY R...
123456789		New Account	02/25/2020 11:12 AM	Crystal	OPEN/CLOSE ...		New		New Acco...	Crystal	IMMEDIATE...
501	Smith,Bob	Charge off status	02/25/2020 10:51 AM	Crystal	COLLECTIONS		New		COLLECTI...	John	EMAIL CON...
497	Smith,Joe	Member paid charg...	02/25/2020 10:47 AM	Crystal	COLLECTIONS		New		COLLECTI...	Chris	PRIORITY R...
481	smith,cindy	New Debit Card	02/25/2020 09:53 AM	Crystal	MANAGEMEN...	DEBIT CARD RE...	New		DANA	Crystal	IMMEDIATE...

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**.

Bob Smith - New Loan

Account	501	Browse
Suffix Type		
Queue	Tammi	
Category	LOAN OFFICER REQUESTED	
Priority	IMMEDIATE RESPONSE REQUESTED	
Created	2/25/2020 11:20:11 AM by sh1hines	
<input type="button" value="Attachments"/> <input type="button" value="Follow-up Records"/>		
Date	Description	Type
<input type="button" value="Print"/> <input type="button" value="Attach"/> <input type="button" value="Reply"/> <input type="button" value="Follow-up"/> <input type="button" value="Hide"/>		
Post ID: 85	Posted By: sh1hines	Posted On: 02/25/2020 11:20 AM
Member called and is interested in buying a car. Please call his cell.		

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

<input type="button" value="Print"/> <input type="button" value="Attach"/> <input type="button" value="Post"/> <input type="button" value="Follow-up"/> <input type="button" value="Hide"/>		
Post ID:	Posted By:	Posted On:
Talked to the member. They are coming into the branch today at 4pm to apply in person and submit their buyers order for the new car.		
Post ID: 85	Posted By: sh1hines	Posted On: 02/25/2020 11:20 AM
Member called and is interested in buying a car. Please call his cell.		

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.

Post ID:	Posted By:	Posted On:
<div style="height: 100px; border: 1px solid #ccc; padding: 5px; margin-top: 10px;"></div>		

4. Click **Post**.

New Thread Entry Box for Members or Associates

The screenshot shows a form for creating a new thread. At the top, there are fields for Account (with a 'Browse' button and 'Non-member' selected), Subject, Suffix Type, Suffix Number, Queue, Status (set to 'New'), Category, Sub-category, Priority, and Assigned To (set to 'Chris'). Below these are sections for 'Created by' (Attachments is selected) and 'Follow-up Records'. A table with columns for Date, Description, and Type is present. At the bottom are buttons for 'Post' and 'Cancel', and fields for Post ID, Posted By, and Posted On. A large text area with a scroll bar is at the bottom.

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.



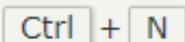
or

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.

Post ID:	Posted By:	Posted On:
<div style="height: 100px; border: 1px solid #ccc; margin: 10px 0;"></div>		

5. Click **Post**.

New Thread Entry Box for Non-Members

Tax ID	<input type="text"/>	Member	Subject	<input type="text"/>
Queue	<input type="text"/>	Status	<input type="text"/>	
Category	<input type="text"/>	Sub-category	<input type="text"/>	
Priority	<input type="text"/>	Assigned To	<input type="text"/>	
Created	by			
Attachments Follow-up Records				
Date	Description	Type		
<div style="border: 1px solid #ccc; height: 100px; margin-top: 10px;"></div>				
Post ID:	<input type="button" value="Post"/>	<input type="button" value="Cancel"/>	Posted By:	Posted On:

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**.

Attachments
Follow-up Records

Assigned User	Follow-up Date	Comment	Method	Status
Tammi	02/26/2020 10:00:00 am	Call Bob about his loan application	Phone	In Process

Print
 Attach
 Reply
 Follow-up
 Hide

Post ID: 89
Posted By: sh1hines
Posted On: 02/25/2020 03:41 PM

Called the member. Left message.

Post ID: 85
Posted By: sh1hines
Posted On: 02/25/2020 11:20 AM

Member called and is interested in buying a car. Please call his cell.

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**.

New Follow-up Record
Cancel

Comment *	
Call the member to follow up on the loan application	
Assigned User *	Date and Time *
Carole	2/27/2020 10:00 AM
Method *	Status *
Phone	In Process
Contact Name	
Carole	
Save Cancel	

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*.

A screenshot of the Imaging Box interface. At the top, there are two tabs: 'Attachments' (which is selected and highlighted in blue) and 'Follow-up Records'. Below the tabs is a table with three columns: 'Date', 'Description', and 'Type'. The table contains two rows of data:

Date	Description	Type
02/25/2020 15:50	Proof of Income	docx
02/25/2020 15:48	Drivers License	jpeg

At the bottom of the box are several buttons: 'Print' (printer icon), 'Attach' (blue 'Attach' button with paperclip icon), 'Reply' (envelope icon), 'Follow-up' (envelope icon with plus sign), and 'Hide' (eye icon).

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*.

A screenshot of the 'Select Document Type and Source' dialog box. At the top, it says 'Add Image' and 'Select Document Type and Source'. Below that is a descriptive text: 'Enter a description and select a document type for the new document then select the image source. You can acquire an image from a scanner or import an existing file from your PC or network.' There are two dropdown menus: 'Document Type' and 'Description'. Below these are two radio buttons: 'File' (selected) and 'Scanner'. A '...' button is located to the right of the 'File' input field.

Existing Threads

The **Contact Management Home Screen** will provide a list of threads based on the filters the user chooses 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.



Selection Filters

Queue	Category	Status	Assigned To	Follow-up Date	Created By	Created Date
<input checked="" type="checkbox"/> ADRIAN	<input checked="" type="checkbox"/> OWNERSHIP CHANGES REQ	<input checked="" type="checkbox"/> New	<Assigned To - Any User>			
<input checked="" type="checkbox"/> ALISON	<input checked="" type="checkbox"/> OPEN/CLOSE NEW SHARE SERVICES	<input checked="" type="checkbox"/> Pending				
<input checked="" type="checkbox"/> BRE	<input checked="" type="checkbox"/> ADD/CLOSE CD SERVICES	<input checked="" type="checkbox"/> In Process				
<input checked="" type="checkbox"/> CINDEE	<input checked="" type="checkbox"/> COLLECTION FOLLOWUP	<input checked="" type="checkbox"/> Completed				
<input checked="" type="checkbox"/> DANA	<input checked="" type="checkbox"/> LOAN OFFICER REQUESTED					

Account: All Accounts Non-Member ID

Account-Suffix/Tax ID Name Subject Created Created By Category Sub-category Status Follow-Up Queue Assigned To Priority

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

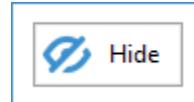
Bob Smith - New Loan

Account	501	Browse
Suffix Type	Share	▼
Queue	ERIC	▼
Category	LOAN OFFICER REQUESTED	▼
Priority	IMMEDIATE RESPONSE REQUESTED	▼
Created 2/25/2020 2:12:08 PM by sh1hines		
<input type="button" value="Attachments"/> <input type="button" value="Follow-up Records"/>		
Assigned User	Follow-up Date	Comment
<input type="button" value="Print"/> <input type="button" value="Attach"/> <input type="button" value="Reply"/> <input type="button" value="Follow-up"/> <input type="button" value="Hide"/>		
Post ID: 86		Posted By: sh1hines
		Posted On: 02/25/2020 02:12 PM
Member is interested in a loan to buy a car.		

Suffixes	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Sts</td><td>Sfx</td><td>Account</td><td>Joint</td><td>Description</td><td>Available</td><td>Misc</td></tr> <tr> <td>S10</td><td>501</td><td>Owner</td><td></td><td>Regular Share</td><td>\$11,995.00</td><td></td></tr> </table>	Sts	Sfx	Account	Joint	Description	Available	Misc	S10	501	Owner		Regular Share	\$11,995.00																																											
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File Maintenance	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Date</th><th>Action</th><th>Field</th><th>Old</th><th>New</th><th>User</th><th>Wk</th></tr> </thead> <tbody> <tr> <td>02/25/2020 10:47:34</td><td>Add</td><td></td><td></td><td></td><td>sh1hines</td><td>CORDMTS03</td></tr> <tr> <td>02/25/2020 10:47:34</td><td>Change</td><td>Locked_By</td><td>User:</td><td>User: sh1hines</td><td>sh1hines</td><td>CORDMTS03</td></tr> <tr> <td>02/25/2020 10:47:34</td><td>Change</td><td>Locked_Time</td><td><null></td><td>2020/02/25 10:47:3...</td><td>sh1hines</td><td>CORDMTS03</td></tr> <tr> <td>02/25/2020 10:47:57</td><td>Change</td><td>Locked_By</td><td>User: sh1hines</td><td>User:</td><td>sh1hines</td><td>CORDMTS03</td></tr> <tr> <td>02/25/2020 10:47:57</td><td>Change</td><td>Locked_Time</td><td>2020/02/25 10:47:34...</td><td><null></td><td>sh1hines</td><td>CORDMTS03</td></tr> <tr> <td>02/25/2020 17:19:47</td><td>Change</td><td>Locked_By</td><td>User:</td><td>User: sh1hines</td><td>sh1hines</td><td>CORDMTS03</td></tr> <tr> <td>02/25/2020 17:19:47</td><td>Change</td><td>Locked_Time</td><td><null></td><td>2020/02/25 17:19:4...</td><td>sh1hines</td><td>CORDMTS03</td></tr> </tbody> </table>	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
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Thread Hide Button

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



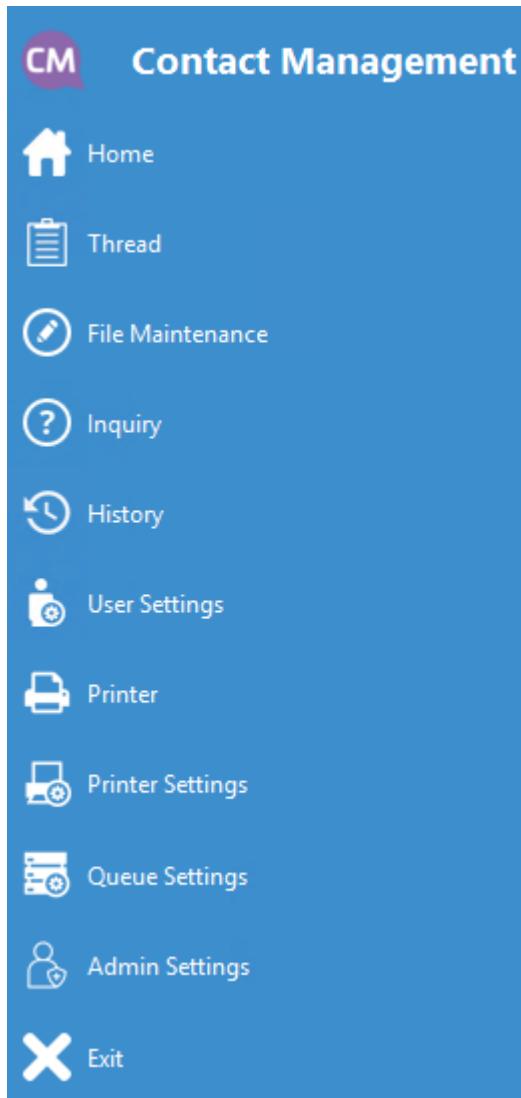
Hide will delete the **Thread** record from Contact Management. The **Thread** will not be seen in the **Contact Management Platform, Teller/Inquiries, or NSQuery**.

Bob Smith - Charge off status

Account <input type="text" value="501"/> <input type="button" value="Browse"/>	Suffix Number <input type="text"/>						
Suffix Type <input type="text"/>	Status <input type="text" value="New"/>						
Queue <input type="text" value="COLLECTIONS"/>	Sub-category <input type="text"/>						
Category <input type="text" value="COLLECTIONS"/>	Assigned To <input type="text" value="John"/>						
Priority <input type="text" value="EMAIL CONTACT REQUESTED"/>							
Created 2/25/2020 10:51:37 AM by sh1hines							
<input type="button" value="Attachments"/> <input type="button" value="Follow-up Records"/>							
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Date</th> <th style="width: 50%;">Description</th> <th style="width: 25%;">Type</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		Date	Description	Type			
Date	Description	Type					
<input type="button" value="Print"/> <input type="button" value="Attach"/> <input type="button" value="Reply"/> <input type="button" value="Follow-up"/> <input type="button" value="Hide"/>							
Post ID: 81 Posted By: sh1hines Posted On: 02/25/2020 10:51 AM							
<div style="border: 1px solid #ccc; padding: 5px; height: 100px; overflow: auto;"> Member wants to discuss charged off status </div>							

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

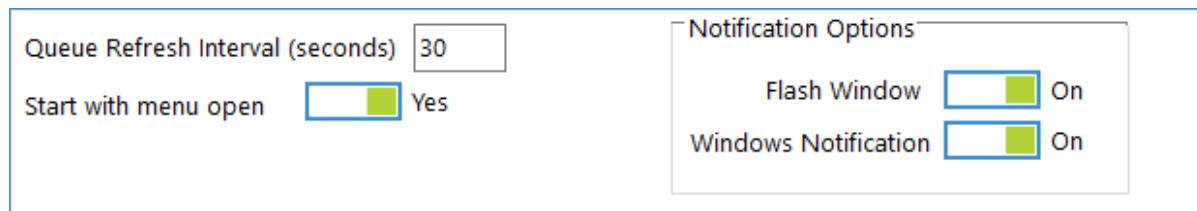
Queue Settings: Create, Edit, Delete Queues and Assign Users

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

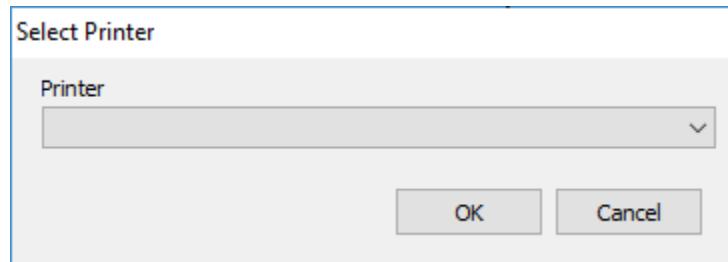
The user can choose to have the menu appear when the Contact Management Platform is selected. This can be modified at any time. The options are Yes or No.

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.

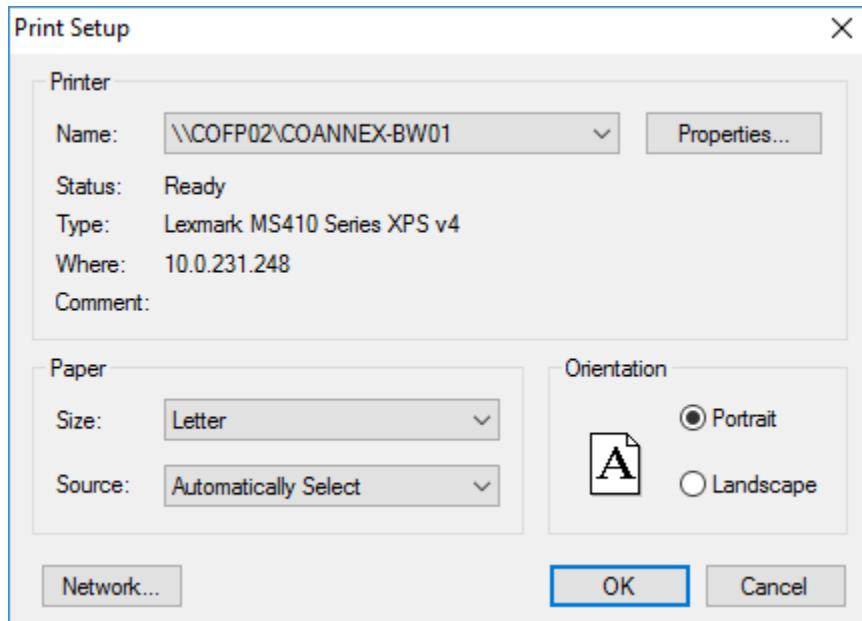
Printer

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 SRVCS	N

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

Users Not In Queue	Users In Queue
Alicia Allison Angie Anita	Name Adrienne Is Owner 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**.

Queues		
Description	Default Category	Private
ADMINISTRATION	MANAGEMENT REQUEST...	N
ADRIAN	COLLECTION FOLLOWUP	Y
ALEX	ADD/CLOSE CD SERVICES	N
ALISON		N
BRE		N
CINDEE		
COLLECTIONS	COLLECTI	
CRYSTAL	LOAN	
DANA		N

3. Give the Queue a **Name** and assign a **Default Category**, if applicable.
4. Assign **Private**, optional.
5. Click **Save**.

New Queue

Queue Name	50 chars
<input type="text"/>	
Default Category	<input type="text"/>
<input type="checkbox"/> Is Private	
<input type="button" value="Cancel"/>	<input type="button" value="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.

Queues			
Description	Default Category	Private	
ADMINISTRATION	MANAGEMENT REQUEST...	N	
ADRIAN	COLLECTION FOLLOWUP	Y	
ALEX	ADD/CLOSE CD SERVICES	N	
ALISON		N	
BRE		N	
CINDEE		N	
COLLECTIONS		P	
CRYSTAL		UP	N
DANA			N
ERIC			N

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**.

Edit Queue

Queue Name	39 chars
<input type="text" value="COLLECTIONS"/>	
Default Category	
<input type="text" value="COLLECTION FOLLOWUP"/>	
Is Private	<input type="checkbox"/>
<input type="button" value="Cancel"/>	<input type="button" value="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.  Queue Settings
2. Highlight the Queue to be deleted in the **Queues** Box.
3. Right-click in the **Queues** box to view the Queue menu.

Queues			
Description	Default Category	Private	
ADMINISTRATION	MANAGMANT REQUESTED	N	
ADRIAN	COLLECTION FOLLOWUP	Y	
ALEX	ADD/CLOSE CD		<ul style="list-style-type: none">Edit QueueDelete QueueNew Queue
ALISON			
BRE			
CINDEE		N	
CRYSTAL	LOAN OFFICER FOLLOWUP	N	
DANA		N	
ERIC		N	

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.

Delete Queue

Threads in queue: 4

Reassign threads to queue

ADMINISTRATION
ADRIAN
ALEX
ALISON
BRE
CINDEE
CRYSTAL
DANA

User Setup

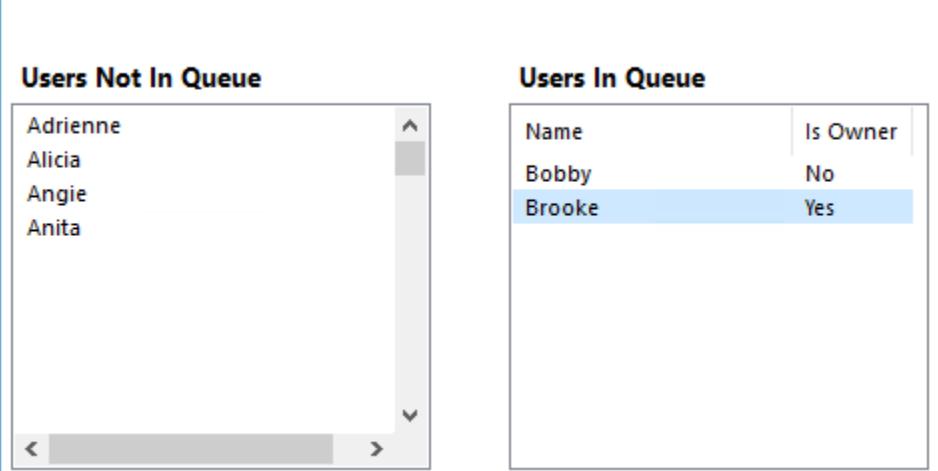
The **Contact Management Platform** will list all users that are set up in NewSolutions as active users. There are two additional columns listed on the **Queue Settings Screen**: **Users Not in the Queue** and **Users in the Queue**. Contact Management Admins can assign Queue Owners by right clicking 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.

Contact Management - Queue Settings			Database - Production	
Queues			Users	
Description	Default Category	Private	Users Not In Queue	
ADRIAN	HOME BANKING	Y	Adrienne	
ALISON		N	Alicia	
BRE		N	Angie	
CINDEE		N	Anita	
COLLECTIONS				
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		

How to Add Users to a Queue

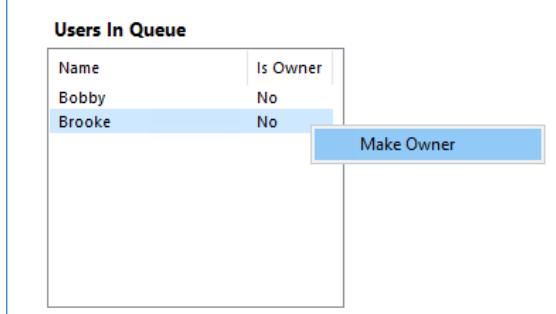
1. Click on **Queue Settings** from the Contact Management menu.
2. Highlight the **Queue** from the **Queues** list.
3. Click the user's name in the **Users Not in Queue** and drag to the next column, **Users in Queue**.



The screenshot shows a user interface for managing a queue. On the left, a list titled "Users Not In Queue" contains the names Adrienne, Alicia, Angie, and Anita. On the right, a list titled "Users In Queue" contains two entries: Bobby (Is Owner: No) and Brooke (Is Owner: Yes). The Brooke entry is highlighted with a blue background.

How to Make a User a Queue Owner

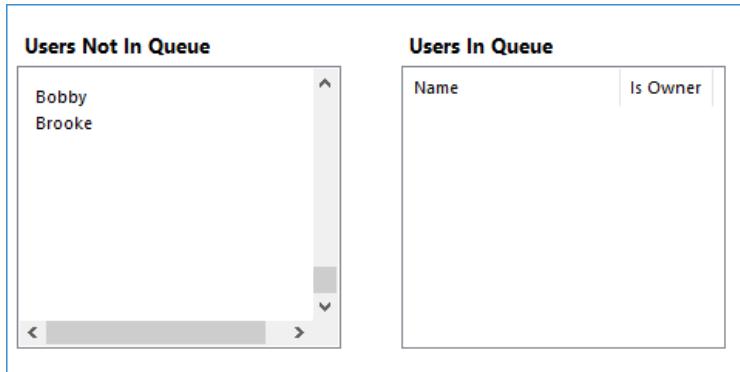
- a. Click on **Queue Settings** from the **Contact Management** menu.
- b. Highlight the **Queue** from the **Queues** list.
- c. Right-click the user listed in the **Users In Queue** box.
- d. Select *Make Owner*.



The screenshot shows the "Users In Queue" list from the previous interface. The Brooke entry is still highlighted. A blue rectangular button labeled "Make Owner" is positioned to the right of the list, with a vertical line connecting it to the Brooke entry.

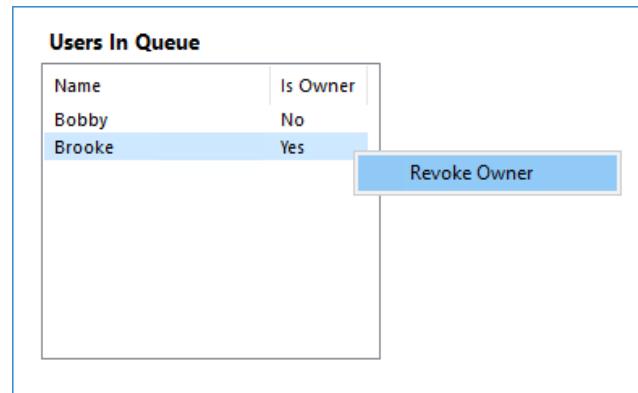
How to Remove Users from a Queue

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*.



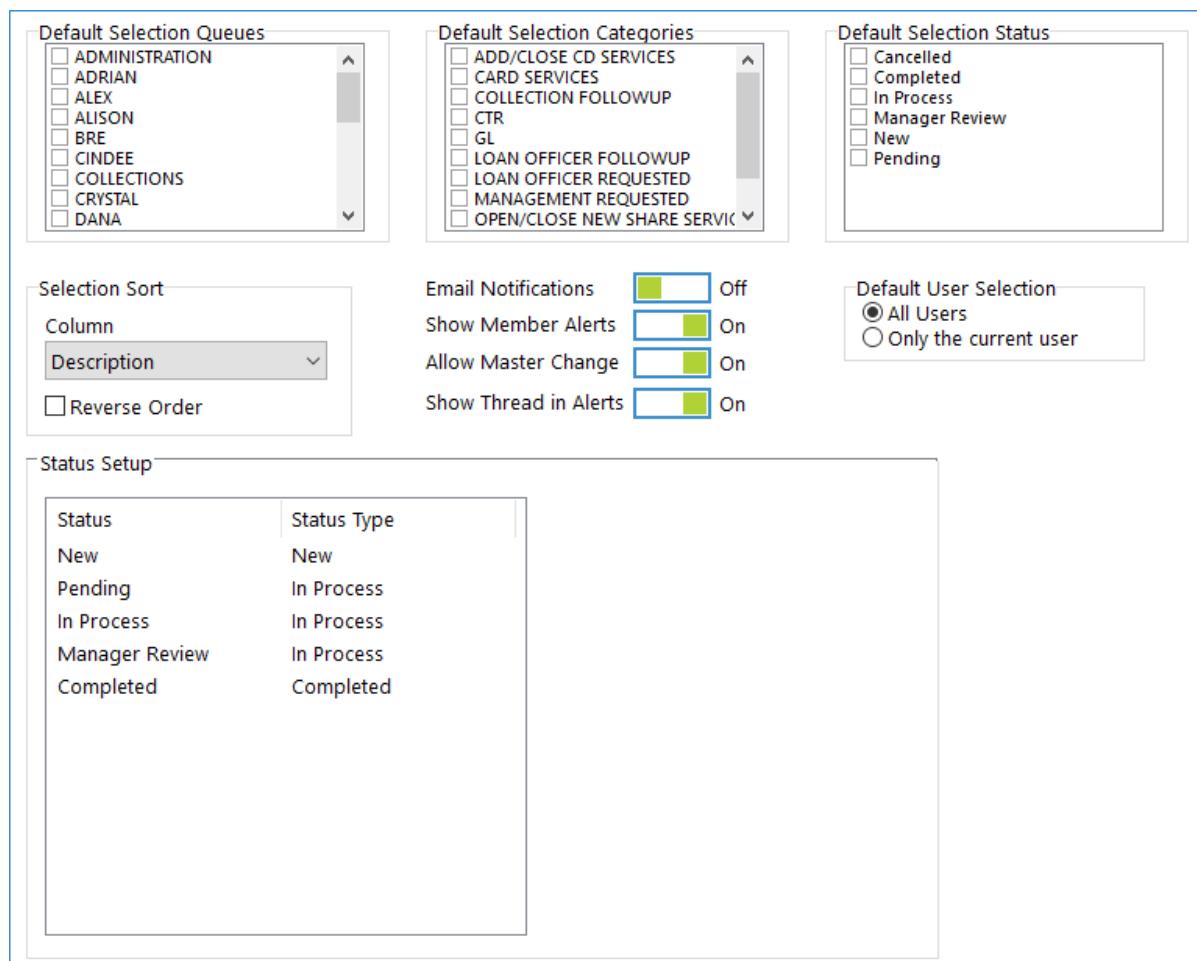
Admin Settings

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.



The screenshot displays the 'Admin Settings' page with the following sections:

- Default Selection Queues:** A list of names with checkboxes: ADMINISTRATION, ADRIAN, ALEX, ALISON, BRE, CINDEE, COLLECTIONS, CRYSTAL, and DANA. Each name has an upward and downward arrow icon to its right.
- Default Selection Categories:** A list of categories with checkboxes: ADD/CLOSE CD SERVICES, CARD SERVICES, COLLECTION FOLLOWUP, CTR, GL, LOAN OFFICER FOLLOWUP, LOAN OFFICER REQUESTED, MANAGEMENT REQUESTED, and OPEN/CLOSE NEW SHARE SERVIC. Each category has an upward and downward arrow icon to its right.
- Default Selection Status:** A list of status types with checkboxes: Cancelled, Completed, In Process, Manager Review, New, and Pending.
- Selection Sort:** A section with a dropdown menu for 'Column' (set to 'Description') and a checkbox for 'Reverse Order'.
- Email Notifications:** A section with checkboxes for 'Email Notifications' (Off), 'Show Member Alerts' (On), 'Allow Master Change' (On), and 'Show Thread in Alerts' (On).
- Default User Selection:** A section with radio buttons for 'All Users' (selected) and 'Only the current user'.
- Status Setup:** A table showing the mapping of status types:

Status	Status Type
New	New
Pending	In Process
In Process	In Process
Manager Review	In Process
Completed	Completed

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**.

The screenshot shows a 'Status Setup' dialog box. On the left is a table with columns 'Status' and 'Status Type'. The table contains the following data:

Status	Status Type
New	New
Pending	In Process
In Process	In Process
Manager Review	In Process
Completed	Completed

On the right is a 'New Status' form with fields for 'Status Description' (a text input box), 'Status Name' (a text input box), 'Status Type' (a dropdown menu), and buttons for 'Save' and 'Cancel'.

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**.

The screenshot shows an 'Edit Status' dialog box. It contains fields for 'Status Description' (containing 'Completed'), 'Status Name' (containing 'Completed'), 'Status Type' (a dropdown menu containing 'Completed'), and buttons for 'Save' and 'Cancel'.

How to Remove a Status

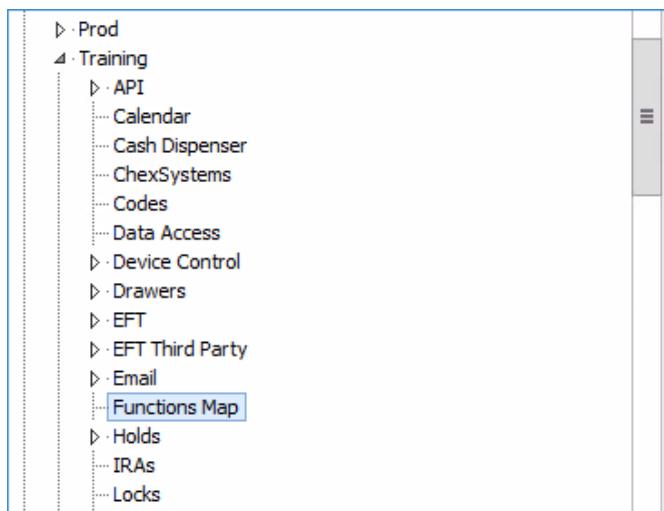
1. Right-click on an existing **Status**.
2. Select **Remove Status**.
3. Select the **Status to replace with** from the drop-down menu.
4. Click **Remove**.

The screenshot shows a 'Remove Status' dialog box. It contains a 'Status to remove' dropdown menu (containing 'Completed') and a 'Status to replace with' dropdown menu. It also contains buttons for 'Remove' and 'Cancel'.

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:

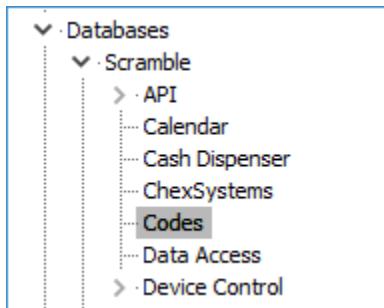
Key	Function	Description
cmadministrator	Contact Management Admin...	Show advanced tab in Contact Management platform
collectivityedit	None	Edit Collection Activity
colladministrator	Collections Administrat...	Show advanced tab in collections platform
collections delete	Collections Delete	Able to Delete records from Collections
collections	Collections	
colofficer	Collections Officer	Run the collections platform

Key	Function
cmadministrator	Contact Management Administrat...
Description	
Show advanced tab in Contact Management platform	

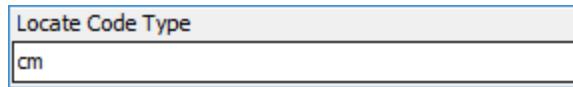
Codes

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.