



NewSolutions

# Contact Management



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# Contact Management

NewSolutions

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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.

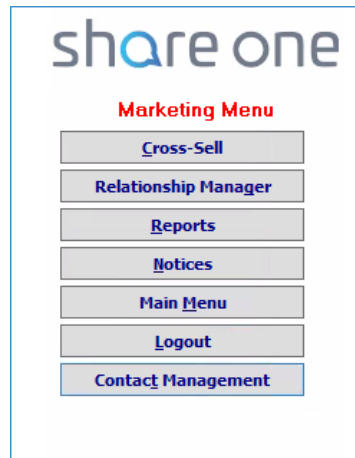
This platform is designed for versatility, utilizing customizable queues and categories to assign and classify incoming, new threads. Additionally, **File Maintenance**, **Inquiries**, and **History** platforms are integrated to allow users to view and edit member data, and the **Imaging** platform is 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 <b>Smith,Bob</b> SSN <b>987-65-4321</b> Status <b>Active</b> Type <b>Member</b>		<table border="1"> <thead> <tr> <th>Sts</th> <th>Sfx</th> <th>Account</th> <th>Description</th> <th>Available</th> <th>Balance</th> </tr> </thead> <tbody> <tr> <td></td> <td>S10</td> <td>501</td> <td>Regular Share</td> <td>\$11,995.00</td> <td>\$12,000.00</td> </tr> </tbody> </table>						Sts	Sfx	Account	Description	Available	Balance		S10	501	Regular Share	\$11,995.00	\$12,000.00												
Sts	Sfx	Account	Description	Available	Balance																												
	S10	501	Regular Share	\$11,995.00	\$12,000.00																												
<div> <input type="button" value="Inquiry"/> </div> <div> <a href="#">Masters</a>  <a href="#">Shares</a>  <a href="#">Loans</a>  <a href="#">Certificates</a>  <a href="#">Account Analysis - Bus</a>  <a href="#">ACH Orig</a>  <a href="#">ACH Warehouse</a>  <a href="#">Alert Preferences</a>  <a href="#">Alerts</a>  <a href="#">Card Log</a>  <a href="#">CC Account</a>  <a href="#">CC Balance</a>  <a href="#">CC History</a>  <a href="#">CC Payoff</a>  <a href="#">ChexSystems</a>  <a href="#">CMS Note</a>  <a href="#">Collections</a>  <a href="#">Contact Management</a>  <a href="#">Credit Reports</a> </div>																																	
<div style="text-align: right;">[New-Mail]</div> <div> <b>Contact Management Threads</b> <input checked="" type="checkbox"/> Show Completed Threads         </div> <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
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02/25/2020	COLLECTIONS	New		COLLECTIONS	John	Charge off status	EMAIL CONTACT REQUESTED																										

## 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).

**Contact Management - Home** Database - Production

**Selection Filters**

Queue: ☒ ADMINISTRATION ☒ ADRIAN ☒ ALEX ☒ ALISON ☒ BRE ☒ CINDY

Category: ☒ CTR ☒ GL ☒ COLLECTIONS ☒ RDC ☒ OWNERSHIP CHANGES REQ

Status: ☒ New ☒ Pending ☒ In Process ☒ Manager Review ☒ Completed

Assigned To:  Follow-up Date:

Created By:  Created Date:

Account: ☒ All Accounts  Non-Member ID:

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.

**Contact Management - Home** Database - Production

**Selection Filters**

Queue: ☐ ADMINISTRATION ☐ ADRIAN ☐ ALEX ☐ ALISON ☐ BRE ☐ CINDY

Category: ☐ OPEN/CLOSE NEW SHARE ☐ CARD SERVICES ☐ OPEN/CLOSE CD ☐ HOME BANKING ☐ LOAN OFFICER REQUESTED ☐ OPEN/CLOSE IDA

Status: ☐ New ☐ Pending ☐ In Process ☐ Manager Review ☐ Completed

# 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**

<b>Queue</b> <div><input type="checkbox"/> ADMINISTRATION <input type="checkbox"/> ADRIAN <input type="checkbox"/> ALEX <input type="checkbox"/> ALISON <input type="checkbox"/> BRE <input type="checkbox"/> CINDY</div>	<b>Category</b> <div><input type="checkbox"/> OPEN/CLOSE NEW SHARE <input type="checkbox"/> CARD SERVICES <input type="checkbox"/> OPEN/CLOSE CD <input type="checkbox"/> BANKING <input type="checkbox"/> OFFICER REQUESTED <input type="checkbox"/> CLOSE ID*</div>	<b>Status</b> <div><input type="checkbox"/> New <input type="checkbox"/> Pending <input type="checkbox"/> In Process <input type="checkbox"/> Manager Review <input type="checkbox"/> Completed</div>
---	---	---

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

<Assigned To - Any User> ▾

Created By

<Created By - Any User> ▾

Follow-up Date

📅

Created Date

📅

- 3. Click **Apply**.

🔍

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**

Queue: ☒ COLLECTIONS  
☐ CRYSTAL  
☐ DANA  
☐ ERIC  
☐ HOLLY  
☐ JAMES

Category: ☐ CTR  
☐ GL  
☒ COLLECTIONS  
☐ RDC  
☐ OWNERSHIP CHANGES REQ

Status: ☒ New  
☐ Pending  
☐ In Process  
☐ Manager Review  
☐ Completed

Assigned To: <Assigned To - Any User>  
 Created By: <Created By - Any User>

Follow-up Date:   
 Created Date:

Account: ☒ All Accounts  Browse Non-Member ID

Apply Clear

Account...	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**

Queue: ☒ ADMINISTRATION  
☒ ADRIAN  
☒ ALISON  
☒ BRE  
☒ CINDIE  
☒ COLLECTIONS

Category: ☒ OPEN/CLOSE NEW SHARE  
☒ CARD SERVICES  
☒ OPEN/CLOSE CD  
☒ HOME BANKING  
☒ LOAN OFFICER REQUESTED  
☒ OPEN/CLOSE CD

Status: ☒ New  
☒ Pending  
☒ In Process  
☒ Manager Review  
☒ Completed

Assigned To: <Assigned To - Any User>  
 Created By: <Created By - Any User>

Follow-up Date:   
 Created Date:

Account: ☒ All Accounts  Browse Non-Member ID

Apply 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...

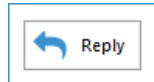
Note: The columns can be sorted by clicking on any header. The system is flexible to allow the user to customize their view. The sort column chosen will stay sorted until the Contact Management Platform is closed.

## 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:

Suffix Type:  Suffix Number:

Queue:  Status:

Category:  Sub-category:

Priority:  Assigned To:

Created: 2/25/2020 11:20:11 AM by sh1hines

Date	Description	Type

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.

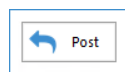
Post ID:      Posted By:      Posted On:

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.

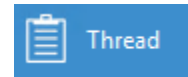
### Create a New Thread for a Member or Associate

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

A blue rectangular button with the text "New Thread" in white.

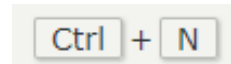
or

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



or

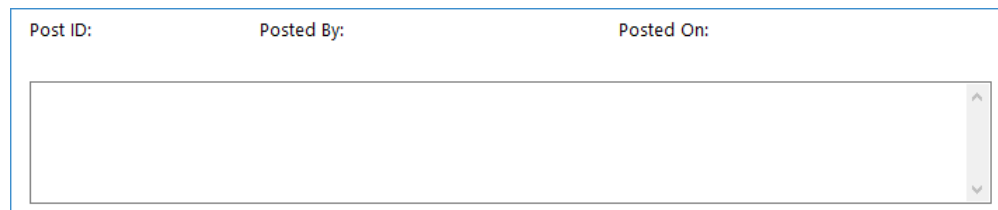
Press CTRL + N on the keyboard on the Home Screen.



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.

A screenshot of the "New Thread Entry Box" form. It has three labels at the top: "Post ID:", "Posted By:", and "Posted On:". Below these labels is a large, empty text area for entering the message, with a vertical scrollbar on the right side.

4. Click **Post**.

## New Thread Entry Box for Members or Associates

The form is titled "New Thread Entry Box for Members or Associates". It contains the following fields and controls:

- Account:** A text input field with a "Browse" button and a "Non-member" button.
- Suffix Type:** A drop-down menu.
- Queue:** A drop-down menu.
- Category:** A drop-down menu.
- Priority:** A drop-down menu.
- Subject:** A text input field.
- Suffix Number:** A drop-down menu.
- Status:** A drop-down menu with "New" selected.
- Sub-category:** A drop-down menu.
- Assigned To:** A drop-down menu with "Chris" selected.
- Created by:** A label.
- Attachments:** A tab with a blue background.
- Follow-up Records:** A tab.
- Table:** A table with three columns: "Date", "Description", and "Type".
- Post:** A button with a blue icon.
- Cancel:** A button with a blue "X" icon.
- Post ID:** A label.
- Posted By:** A label.
- Posted On:** A label.

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.

A blue rectangular button with the text "New Thread" in white.

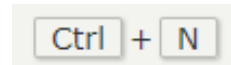
or

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



or

3. 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></div>		

5. Click **Post**.

# New Thread Entry Box for Non-Members

Tax ID

Member

Subject

Queue

Status

New

Category

Sub-category

Priority

Assigned To

Chris

Created

by

Attachments

Follow-up Records

Date	Description	Type

Post

Cancel

Post ID:

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**.

The screenshot shows a web interface with two tabs: "Attachments" and "Follow-up Records". The "Follow-up Records" tab is active, displaying a table with the following data:

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

Below the table are five buttons: Print, Attach, Reply, Follow-up, and Hide. Below these buttons, the following information is displayed:

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

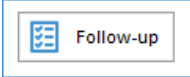
Below this is a text box containing the comment: "Called the member. Left message."

Below the text box, the following information is displayed:

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

Below this is another text box containing the comment: "Member called and is interested in buying a car. Please call his cell."

## How to Create a Reminder Follow-up Record

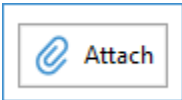
1. Create the new **Thread** or search an existing **Thread**.
2. Click on the **Follow-up** button  in the center of the **Thread** box or right-click in the **Follow-up Records** Box and click *Follow-up*.
3. A **New Follow-up Record** Box will appear, then complete the fields to set up the reminder.
4. Click **Save**.

The screenshot shows the "New Follow-up Record" form with the following fields and values:

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


At the bottom of the form are two buttons: Save and 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*.

Attachments		Follow-up Records
Date	Description	Type
02/25/2020 15:50	Proof of Income	docx
02/25/2020 15:48	Drivers License	jpeg

Print Attach Reply Follow-up Hide

- 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*.

Add Image

Select Document Type and Source

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.

Document Type

Description

☒ File

☐ Scanner

## 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.

The screenshot displays the 'Selection Filters' section at the top, which includes four main categories: Queue, Category, Status, and Assigned To. Each category has a list of items with checkboxes. Below these are fields for 'Account' (with a dropdown for 'All Accounts') and 'Non-Member ID'. There are also buttons for 'Apply' and 'Clear'. To the right of the filters are two date pickers: 'Follow-up Date' and 'Created Date'. Below the filters is a table with the following columns: Account-Suffix/Tax ID, Name, Subject, Created, Created By, Category, Sub-category, Status, Follow-Up, Queue, Assigned To, and Priority. The table is currently empty.

## 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:

Suffix Type:

Queue:

Category:

Priority:

Suffix Number:

Status:

Sub-category:

Assigned To:

Created: 2/25/2020 2:12:08 PM by sh1hines

Assigned User	Follow-up Date	Comment	Method	Status

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

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

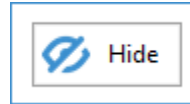
Data 1	Data 2	Type
S8009987776	MI	DriverLic

### 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**.

Account

501

Browse

Suffix Type

Queue

COLLECTIONS

Category

COLLECTIONS

Priority

EMAIL CONTACT REQUESTED

Bob Smith - Charge off status

Suffix Number

Status

New

Sub-category

Assigned To

John

Created

2/25/2020 10:51:37 AM by sh1hines

Attachments

Follow-up Records

Date	Description	Type

Print

Attach

Reply

Follow-up

Hide

Post ID: 81













Posted By: sh1hines

Posted On: 02/25/2020 10:51 AM

Member wants to discuss charged off status

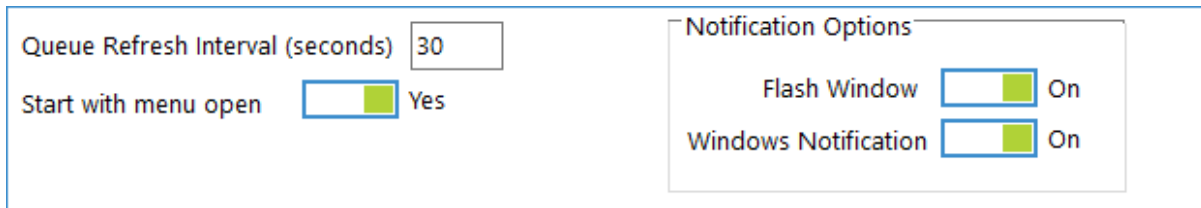
If you mistakenly **Hide** (delete) a **Thread** and it is imperative that it be located, it will require the credit union to call Share One to find the **Thread** in the SQL database.

## Contact Management Menu

 <b>Contact Management</b>	
 Home	Home: Contact Management Home Screen
 Thread	Thread: Create or Edit a Thread Messages
 File Maintenance	File Maintenance: View or Edit a Member's Profile
 Inquiry	Inquiry: View a Member's Profile
 History	History: Member's Transaction History
 User Settings	User Settings: Customize Your Screen
 Printer	Printer: Select a Printer
 Printer Settings	Printer Settings: Edit Printer Settings
 Queue Settings	Queue Settings: Create, Edit, Delete Queues and Assign Users
 Admin Settings	Admin Settings: Customize Contact Management Platform for All Users
 Exit	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**.

A screenshot of the 'User Settings' interface. It features a light blue border. On the left, there are two settings: 'Queue Refresh Interval (seconds)' with a text input field containing '30', and 'Start with menu open' with a green toggle switch and the text 'Yes'. On the right, there is a section titled 'Notification Options' containing two settings: 'Flash Window' and 'Windows Notification', each with a green toggle switch and the text 'On'.

## How User Customizes their Screen and Notifications

### 1. Queue Refresh Interval

This is an interval of time in seconds set by the user. This refreshes the user's 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

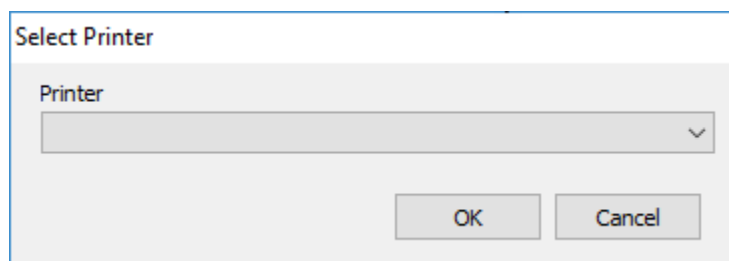
The user can choose to have the menu appear when the Contact Management Platform is selected. This can be modified at any time. The options are Yes or No.

### 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.

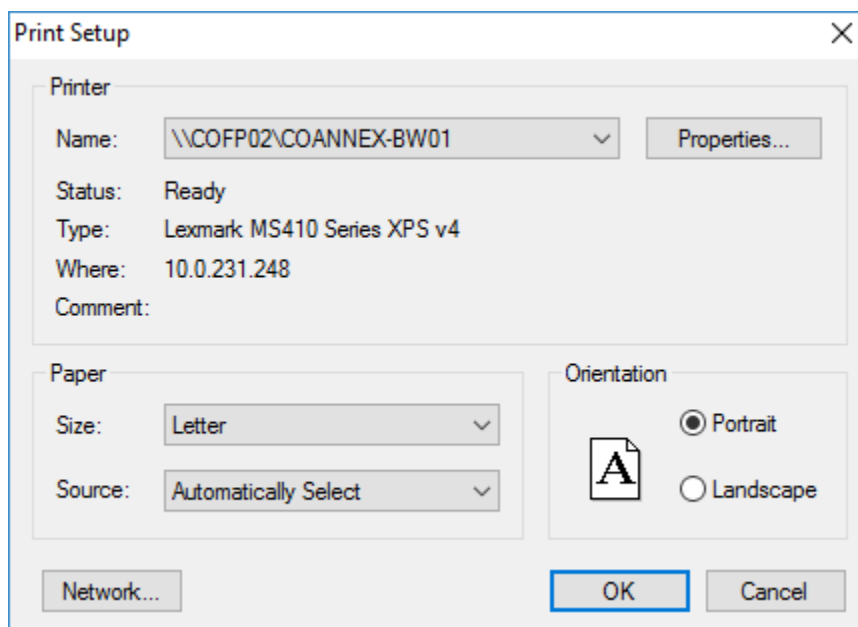
## Printer

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

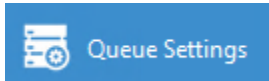
Users In Queue

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**.

**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	COLLEC	
CRYSTAL	LOAN	
DANA		N

Right-click context menu options: Edit Queue, Delete Queue, **New Queue**

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

**New Queue**

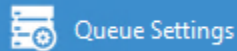
Queue Name 50 chars

Default Category

Is Private ☐

## 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.

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 N
CRYSTAL		/UP N
DANA		N
ERIC		N

Edit Queue

Delete Queue

New Queue

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

COLLECTIONS

Default Category

COLLECTION FOLLOWUP

Is Private


☐

Cancel

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	MANAGEMENT REQUESTED	N
ADRIAN	COLLECTION FOLLOWUP	N
ALEX	ADD/CLOSE CD	N
ALISON		N
BRE		N
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

Cancel

Delete

# 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 SettingsDatabase - Production

Queues

Description	Default Category	Private
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

Users Not In Queue

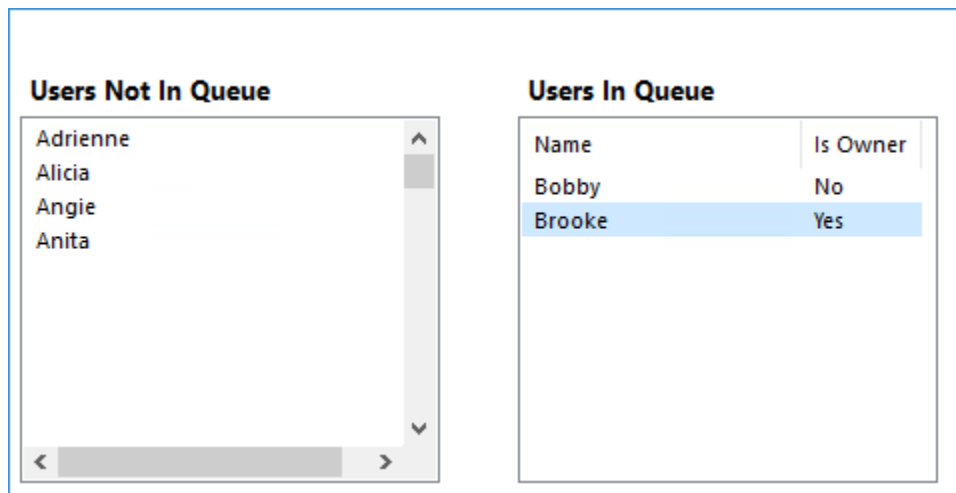
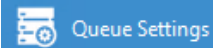
Adrienne  
Alicia  
Angle  
Anita

Users In Queue

Name	Is Owner
Bobby	No
Allison	No
Brooke	No

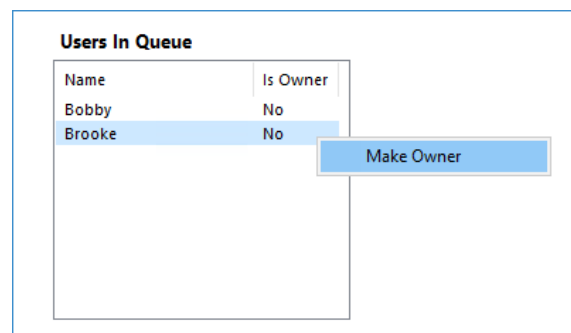
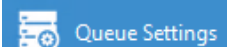
## How to Add Users to a Queue

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**.



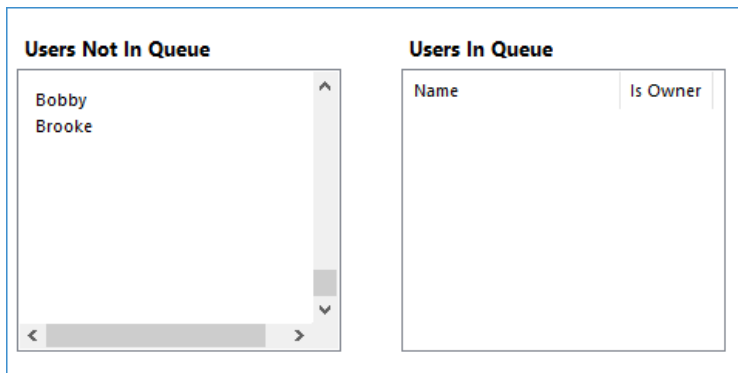
## How to Make a User a Queue Owner

- 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*.



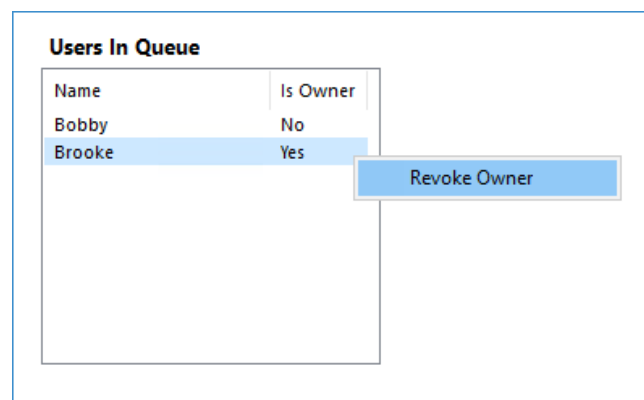
## How to Remove Users from a Queue

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*.



## 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.

**Default Selection Queues**

- ☐ ADMINISTRATION
- ☐ ADRIAN
- ☐ ALEX
- ☐ ALISON
- ☐ BRE
- ☐ CINDEE
- ☐ COLLECTIONS
- ☐ CRYSTAL
- ☐ DANA

**Default Selection Categories**

- ☐ ADD/CLOSE CD SERVICES
- ☐ CARD SERVICES
- ☐ COLLECTION FOLLOWUP
- ☐ CTR
- ☐ GL
- ☐ LOAN OFFICER FOLLOWUP
- ☐ LOAN OFFICER REQUESTED
- ☐ MANAGEMENT REQUESTED
- ☐ OPEN/CLOSE NEW SHARE SERVICE

**Default Selection Status**

- ☐ Cancelled
- ☐ Completed
- ☐ In Process
- ☐ Manager Review
- ☐ New
- ☐ Pending

**Selection Sort**

Column

Description

☐ Reverse Order

Email Notifications ☐ Off  
Show Member Alerts ☐ On  
Allow Master Change ☐ On  
Show Thread in Alerts ☐ On

**Default User Selection**

☒ All Users  
☐ Only the current user

**Status Setup**

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**.

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

**New Status**  
Status Description:   
Status Name:   
Status Type:

## 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**.

**Edit Status**  
Status Description:   
Status Name:   
Status Type:

### How to Remove a Status

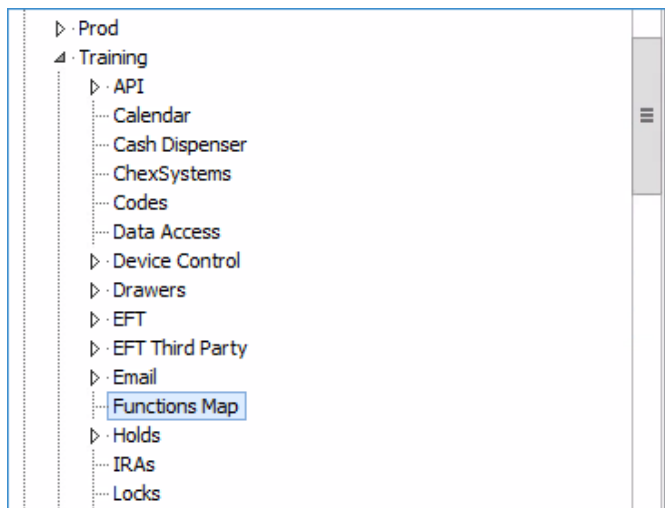
1. Right-click on an existing **Status**.
2. Select *Remove Status*.
3. Select the **Status to replace with** from the drop-down menu.
4. Click **Remove**.

**Remove Status**  
Status to remove:   
Status to replace with:

# Enterprise Settings for Contact Management

## Functions Map

In Enterprise/Function Map there is a Key for cadministrator. 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.



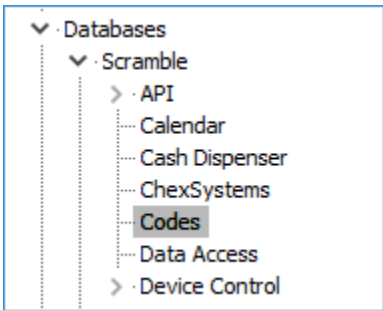
Application Functions Map			Find: <input type="text" value="cadmin"/>	<input type="button" value="Search"/>
Key	Function	Description		
cadministrator	Contact Managemen...	Show advanced tab in Contact Management platform		
collactivityedit	None	Edit Collection Activity		
colladministrator	Collections 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		

Key	Function
<input type="text" value="cadministrator"/>	<input type="text" value="Contact Management Administratr"/> ▼
Description	
<input type="text" value="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:

Locate Code Type
cm

The Contact Management list of Code Tables:

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

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

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

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

<b>Contact_Management_Thread</b>	This table allows users to query on threads in Contact Management.
----------------------------------	--