

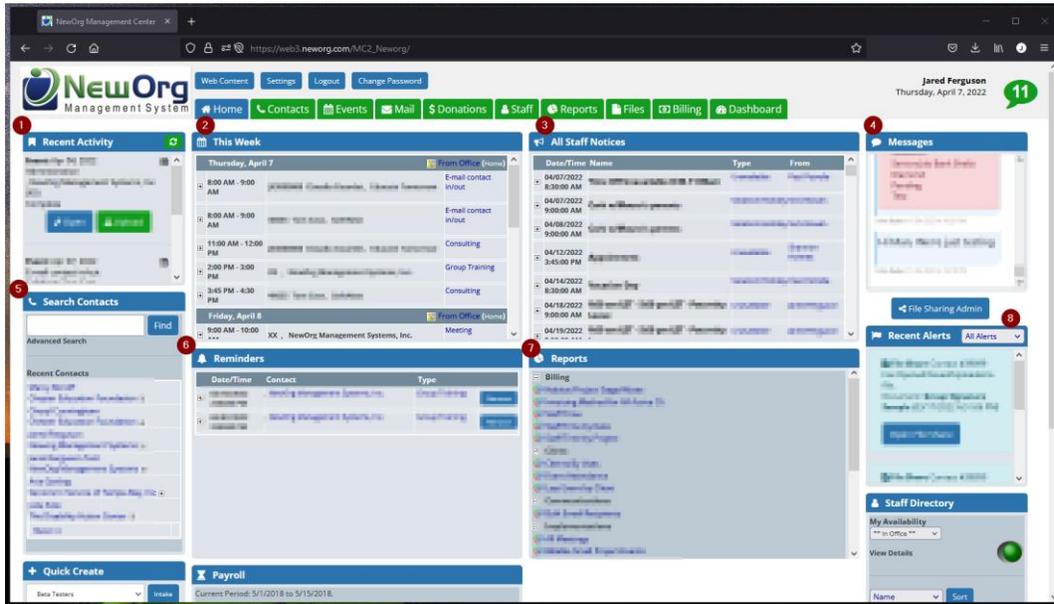


Hidden Gems - Contact View display logic. Mapping on reports. Home tab, tips, and tricks

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Home Tab Functionality



- 1) Recent Activity - Events, Contacts, Files, Forms etc. that have been opened or edited recently.
- 2) This Week – Events starting with today and through the next week where the User logged in is the Event Assigned To. Can be utilized for scheduling this week and managing daily activities.
- 3) All Staff Notices - Within Events, if the user as Admin on the events area of the system, All Staff can be selected within the Access dropdown. This is beneficial for Announcements organization wide, indicating when individuals are out of the office, or overall general communications with All users.
- 4) Messages – NewOrg has a built-in messaging tool. If you have any new messages, they will be displayed in the Messages panel as a tickler / notification.
- 5) Search Contacts – An abbreviated search screen / filter for Contact records. Once searched, results will be displayed below the Search Contacts filter.
- 6) Reminders – Within Events, next to the Start Time / End time to the right, a reminders field can be utilized to add Events to your Home tab as the Event Assigned To. This is beneficial if needing to return to documentation. Note: The Open / Closed is directly related to whether the event will be displayed in Reminders on the Home tab. If closed, the Event will be removed from the Home tab.
- 7) Reports – Reports in the system can be added to a single user, multiple users, groups, types, departments etc. to the Home tab of the system. This is beneficial for reports that part of workflow processes and ease of access / navigation to the report filter screen.
- 8) Recent Alerts – Online Donation Submissions, File Sharing Activity, SMS Text Message Replies, Online Scheduler Bookings will be displayed within the Recent Alerts area. This is helpful to identify when public facing activity is occurring within the system and each Recent Alert can be clicked to go to the source record.

[Home Tab Training Video](#)

Using All Notice / All Staff within an Event Details tab

For users with Admin privileges within Events, the Access dropdown can be utilized to select All Staff or All Notice to publish notices to the either Home tab in the All Staff Notices (All Staff) or when each user logs in a notice will be displayed (All Notice).

The screenshot displays the 'Event Update' interface in the NewOrg Management Center. The page is titled 'NewOrg Management Center' and shows the URL 'https://web3.neworg.com/MC2_Neworg/EventUpdate.asp'. The main form includes fields for 'Contact' (Neworg Management Systems: Jared Ferguson (39899)), 'Type' (Administration), 'Date' (04/07/2022), 'Start Time' (8:00 AM), 'End Time' (9:00 AM), 'Minutes' (60), and 'Remind me' (0 days before this event). There are also fields for 'Description', 'Assigned To' (Jared Ferguson), and 'Funding Source' (Implementation Contract, Daily, \$50.00). The 'Access' dropdown menu is highlighted with a red box and a red circle with the number '1', showing options: Public, Private, All Staff, All Notice, and Web Site. The 'Status' is set to 'Pending' and 'Open/Closed' is set to 'Open'. There are buttons for 'Save', 'Save & New', 'Save & Close', and 'Cancel'. At the bottom, there are checkboxes for 'Copy Contacts' and 'Copy Event', and a footer indicating 'Created: 04/07/2022 By: Jared Ferguson Modified: 04/07/2022 By: Jared Ferguson'.

Using Survey / Forms through NewOrg Email to Request Contacts to update their Contact Information

NewOrg Survey / Forms can be customized to be used through the NewOrg Mail Feature. Within the Form editor, to utilize the form through Mail and link back to the Contact that received the survey / form, utilize the Link with the “Link (NewOrg Mail)” identifier.

The screenshot shows the 'Edit Survey/Form' interface in the NewOrg Management Center. The browser address bar indicates the URL: https://web3.neworg.com/MC2_NewOrg/SetFormQuestions.asp?FormNum=25. The form editor includes the following fields:

- Survey/Form Name:** Group Training Feedback Survey
- Description:** You are receiving this survey because you attended a NewOrg Group Training Session on August 26th presented by Nick Rowan.
- Message when completed:** `<table align="center" border="0" cellpadding="1" cellspacing="1" style="width:800px"><tbody><tr><td style="text-align: center; vertical-align: middle;">`
- Type:** Implementation Participants
- Status:** Active
- Allow Anonymous:** Yes
- Group:** Group Trainings
- Allow Public:** Public
- Default Public Group:** Client NewOrg

At the bottom of the form editor, there are two links:

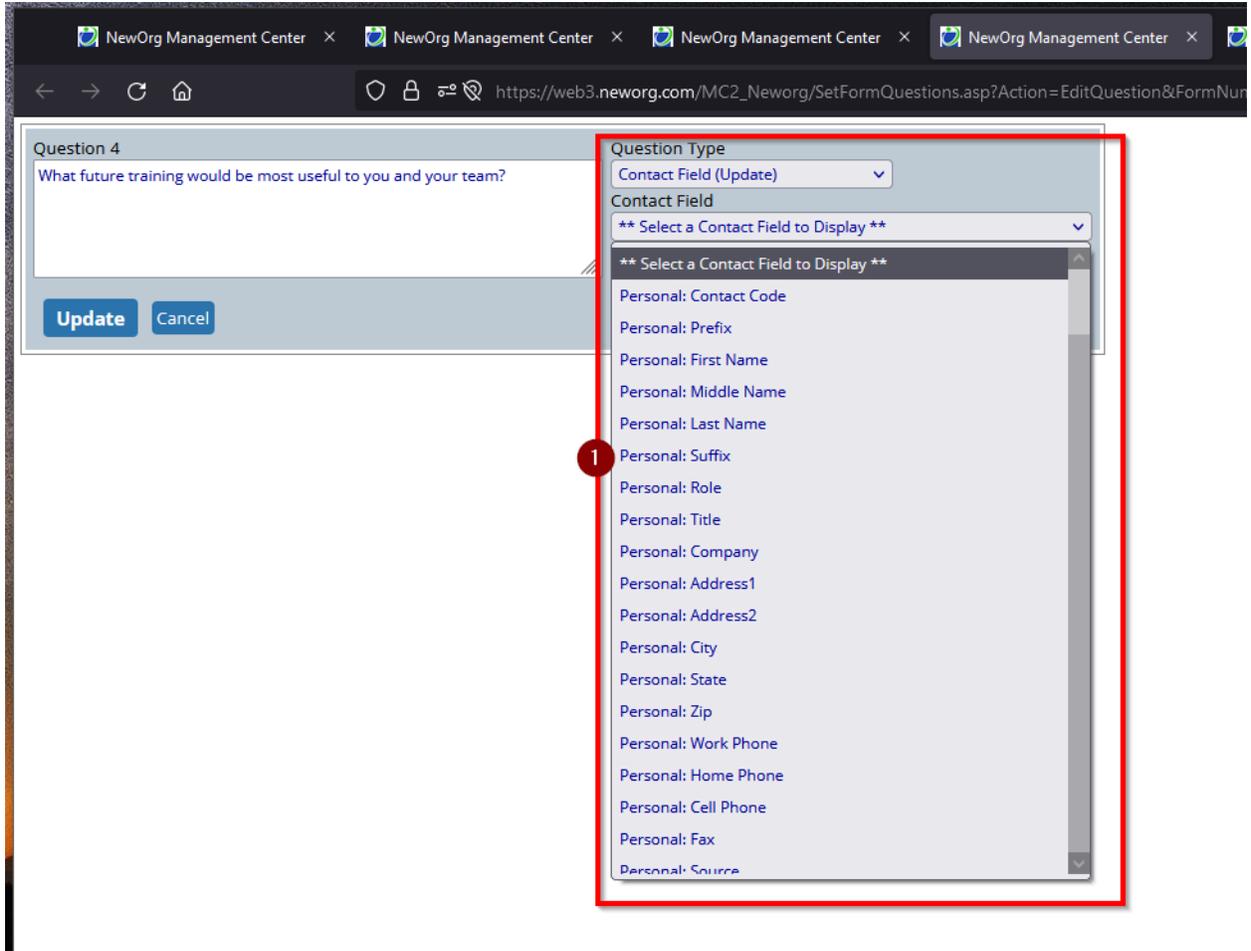
- Link (Anonymous):** https://web3.neworg.com/MC2_NewOrg/FormQuestions.asp?FormNum=25
- Link (NewOrg Mail):** [https://web3.neworg.com/MC2_NewOrg/FormQuestions.asp?FormNum=25&cod=\\${externalid}](https://web3.neworg.com/MC2_NewOrg/FormQuestions.asp?FormNum=25&cod=${externalid})

A red box highlights the 'Link (NewOrg Mail)' field, and a red circle with the number 1 is placed next to it. A warning message states: "There are Active results for this Form/Survey. Changing the Form/Survey questions could cause some of these results to be lost."

Below the form editor, the interface shows 'Page #1' with two survey questions:

- 1. Group Training Feedback**
1. Please rate your NewOrg Trainer on a scale of 1 - 10.
1 = No Value / 10 = Outstanding
Radio buttons: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10
Buttons: Edit Question, Move, Copy, Delete, Logic, Insert Question, Page Break
2. Please rate how valuable the training session to be on a scale of 1 - 10.
1 = No Value / 10 = Outstanding
Radio buttons: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10
Buttons: Edit Question, Move, Copy, Delete, Logic, Insert Question, Page Break

Questions within the Survey / Form can be set as Update Contact in the Question Type and select the Contact Field within the Contact Field dropdown.



[Sending Surveys Through NewOrg Mail](#)

Utilizing the Copy Contact / Copy Event – Save & New on Event Details to Enter Data Quickly

The screenshot shows the 'EventUpdate.asp' page in the NewOrg Management Center. The form is filled with the following data:

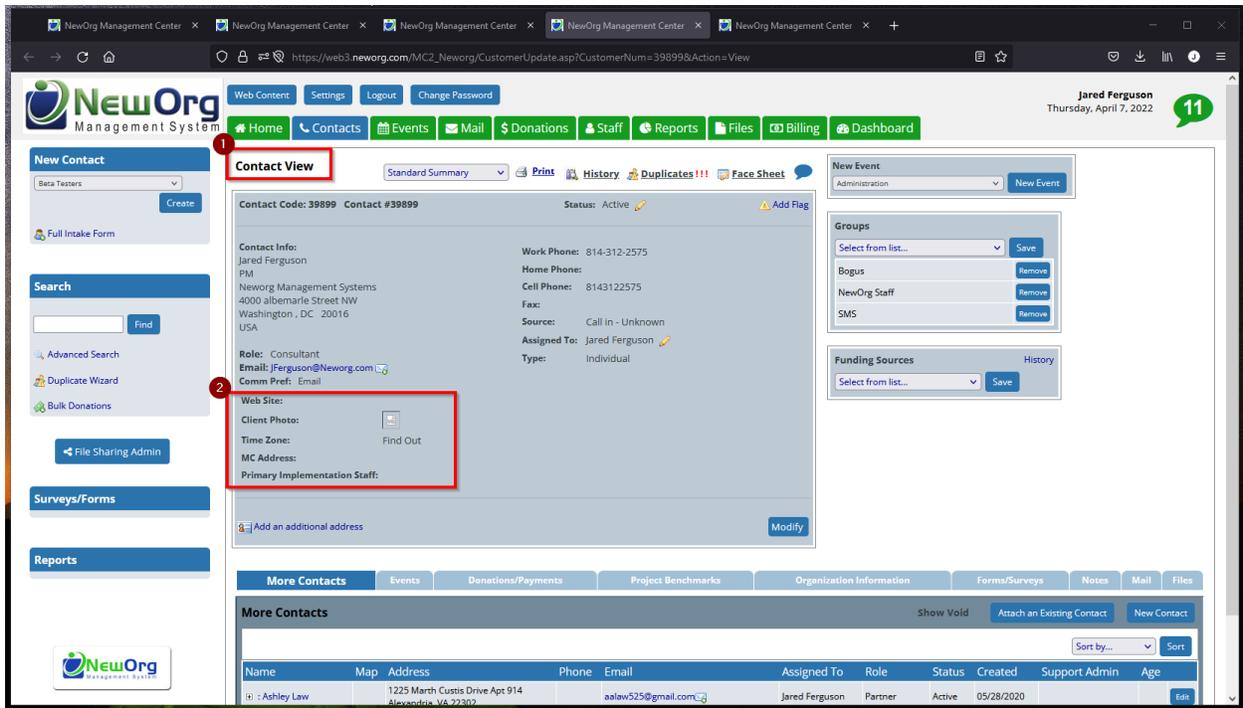
- Contact:** NewOrg Management Systems: Jared Ferguson (39899)
- Type:** Administration
- Date:** 04/07/2022
- Start Time:** 8:00 AM
- End Time:** 9:00 AM
- Minutes:** 60
- Remind me:** 0 days before this event.
- Description:** (Empty text area)
- Outcome:** (Empty text area)
- Assigned To:** Jared Ferguson
- Funding Source:** Implementation Contract, Bill Type: Daily, Amount: \$50.00
- Status:** Complete
- Open/Closed:** Open
- Access:** Public
- Available Forms/Surveys:** NewOrg Feature Survey (5/27/2020 - (Feedback Active))

At the bottom left, a red box highlights the 'Save & New' button and the 'Copy Contacts' and 'Copy Event' checkboxes, which are both checked. A red circle with the number '1' is positioned above the 'Save & New' button.

On each Event's Event Details tab the Copy Contact / Copy Event and Save & New feature is available. This will copy the Contact and / or Event, save the previous Event noted, and create a new event. When entering notes en masse for a particular contact, or entering bulk timesheets, or other activities that require entering multiple Events, these two buttons can be utilized to save time and cut down on data entry.

Contact View – Custom Fields Display

On every NewOrg System, on the Contact View, fields can be set to display on the Contact View directly under the Comm Pref: selection. These fields can be added as any Contact Field, or custom logic retrieving Events, Survey / Forms, Print Forms, or other data. These can include images for Clients, Companies, Locations etc.



This area can be highly customizable to the customer needs. Key question is identifying what information is beneficial to be displayed immediately when opening the Contact record.

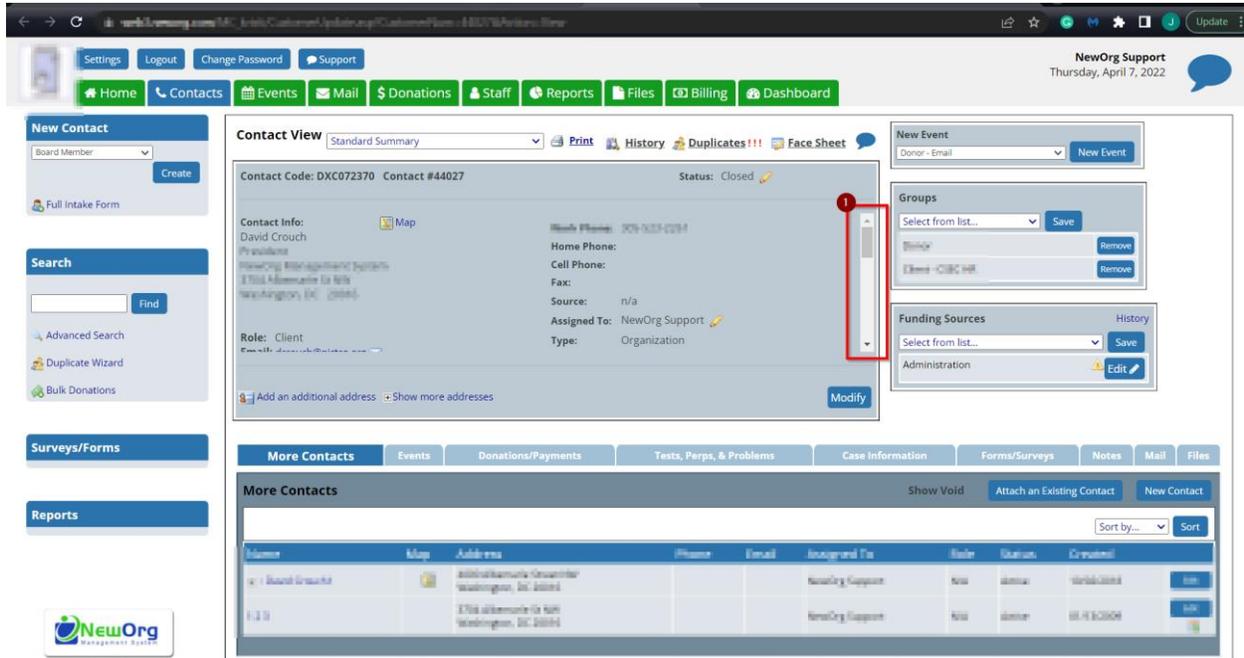
Note: Contact View Display Fields will be visible for All Contacts, regardless of Contact Group.

Contact View Screen

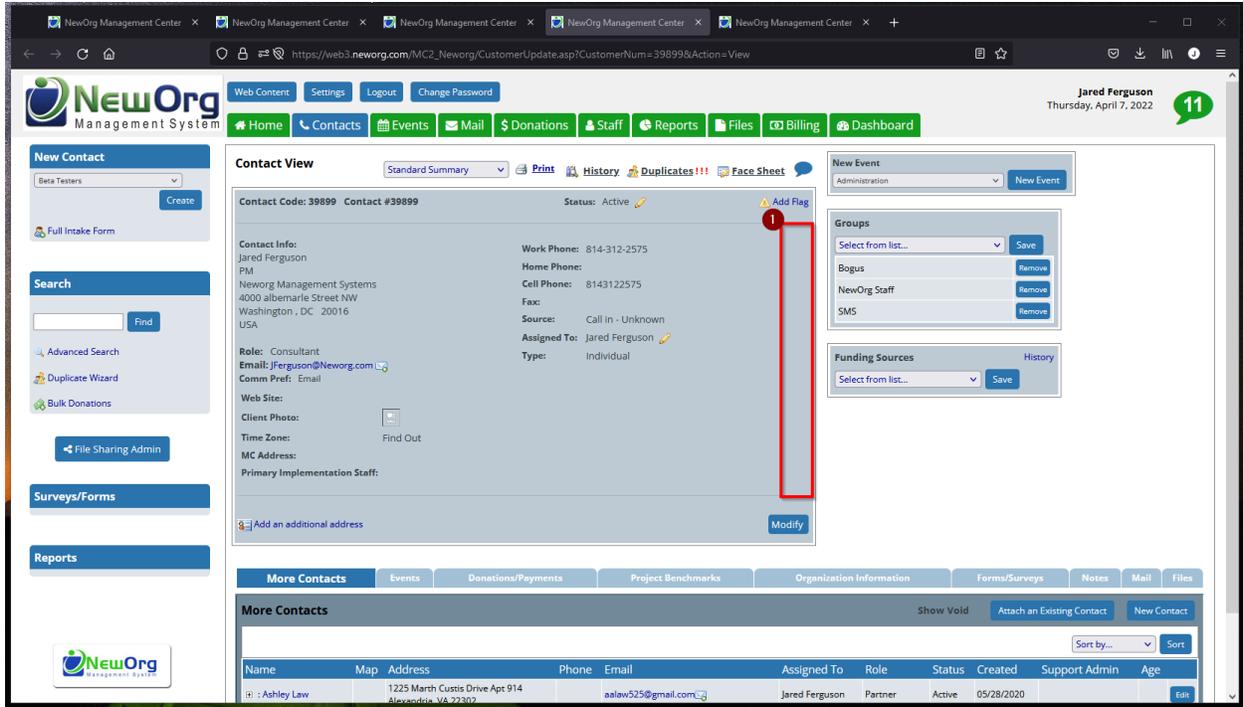
Contact View Expand

For those customers who have a list of Contact View – Display Fields, a setting can be toggled to either Expand the Contact View or not.

Example Below of Contact View Not Expanded (Includes Scroll Bar) –



Example of Contact View Expanded (No Scroll Bar) –



Contact Search Results Display

Within the Contacts tab of the system in Contact Results, and within the More Contacts tab of the Contact View of individual Contact records, a single custom field can be added.

The screenshot shows the 'Contact Search' results page in the NewOrg Management System. The search criteria are: Code: 39899, Name: Jared Ferguson, Company: NewOrg Management Systems, Address: 4000 albarlarle Street NW, Washington, DC 20016, USA, Email: JFerguson@Neworg.com, Role: Consultant, Group: Bogus, NewOrg Staff, SMS, Status: Active, User: JF, Updated: 03/10/2022. The table below shows two results:

Code	Send Name	Company	Address	Email	Phones	Role	Group	Status	User	Updated	Support Admin
39899	Jared Ferguson	NewOrg Management Systems	4000 albarlarle Street NW, Washington, DC 20016, USA	JFerguson@Neworg.com	Wk: 814-312-2575 Cell: 814-312-2575	Consultant	Bogus, NewOrg Staff, SMS	Active	JF	03/10/2022	
40046	Jared Ferguson Test	NewOrg Management Systems	4000 Albarlarle St. NW, Suite 200, Washington, DC 20016, USA	jferguson@neworg.com	Cell: 814-312-2575	Operations		Active	JF	03/10/2022	

The screenshot shows the 'Contact View' page for contact 39899. The contact information is as follows:

- Contact Code: 39899
- Contact Name: Jared Ferguson
- Company: NewOrg Management Systems
- Address: 4000 albarlarle Street NW, Washington, DC 20016, USA
- Role: Consultant
- Email: JFerguson@Neworg.com
- Work Phone: 814-312-2575
- Home Phone: 814-312-2575
- Cell Phone: 814-312-2575
- Fax: 814-312-2575
- Source: Call in - Unknown
- Assigned To: Jared Ferguson
- Type: Individual

The 'More Contacts' table at the bottom shows the following data:

Name	Map	Address	Phone	Email	Assigned To	Role	Status	Created	Support Admin
Ashley Law		1225 Marth Custis Drive Apt 914 Alexandria, VA 22302		aalaw525@gmail.com	Jared Ferguson	Partner	Active	05/28/2020	
Jared Ferguson TEST		4000 albarlarle Street NW Washington, DC 20016		Jaredpaullferguson@gmail.com	Jared Ferguson	*Unknown*	Active	07/27/2021	

Contact Tab Search and Mini Icons Navigation

Within the Contacts tab search, once the Contact results, there are icons for navigation to the More Contacts, Donations, Events, Custom Fields, Survey / Forms, and Face Sheet.

The screenshot displays the NewOrg Management System interface. The navigation bar at the top includes tabs for Home, Contacts, Events, Mail, Donations, Staff, Reports, Files, Billing, and Dashboard. The 'Contacts' tab is highlighted. Below the navigation bar, there is a 'Contact search' form with fields for Code, #, Name/Company/Email, Address, Country, Phone, Assigned, Group, Source, Type, Role, Status, and DOB. A 'Find' button is located at the bottom right of the search form. Below the search form, a table displays the search results. The table has columns for Code, Send Name, Company, Address, Email, Phones, Role, Group, Status, User Updated, and Support Age Admin. Two contacts are listed: Jared Ferguson (Code: 39899) and Jared Ferguson Test (Code: 40046). Mini icons for navigation are visible in the table rows, and a red box highlights the 'Contacts' tab in the navigation bar.

Code	Send Name	Company	Address	Email	Phones	Role	Group	Status	User Updated	Support Age Admin	
39899	Jared Ferguson	NewOrg Management Systems	4000 Albemarle Street NW, Washington, DC 20016, USA	JFerguson@Neworg.com	Wk: 814-312-2575 Cell: 8143122575	Consultant	Bogus, NewOrg Staff, SMS	Active	JF	03/10/2022	
40046	Jared Ferguson Test	NewOrg Management Systems	4000 Albemarle St, NW, Suite 200, Washington, DC 20016, USA	JFerguson@neworg.com	Cell: 814-312-2575	Operations		Active	JF	03/10/2022	

Contacts Tab

Full Intake Form / Full Contact Details

Within the Contacts tab of the system, after selecting a Contact Group, the Full Intake Form can be utilized. This will navigate to an abbreviated data entry screen for Name, Source, Type, Role, Group etc. After clicking Save, the user will be navigated to the Full Contact Details.

This process allows for All Contact Custom Fields available to the Contact Group to be displayed for the Contact record on a single page.

The screenshot displays the NewOrg Management System interface. The 'Contacts' tab is selected in the top navigation bar. On the left sidebar, under the 'New Contact' section, the 'Full Intake Form' option is highlighted with a red box and a circled number 3. Other options include 'Client NewOrg' (highlighted with a red box and circled number 2) and 'Create'. The main content area shows a 'Contact Search' form with various input fields and a 'Find' button. Below the search form, a table titled 'Found 2 Contacts.' displays two contact records. At the bottom left, there are links for 'Mail To Checked' and 'Mail to All'.

Code	Send Name	Company	Address	Email	Phones	Role	Group	Status	User	Updated	Support Age
39899	Jared Ferguson	NewOrg Management Systems	4000 albemarle Sreet NW, Washington, DC 20016, USA	JFerguson@Neworg.com	Wk: 814-312-2575 Cell: 8143122575	Consultant	Bogus, NewOrg Staff, SMS	Active	JF	03/10/2022	
40046	Jared Ferguson Test	NewOrg Management Systems	4000 Albemarle St. NW, Suite 200, Washington, DC 20016, USA	jferguson@neworg.com	Cell: 814-312-2575	Operations		Active	JF	03/10/2022	

The screenshot displays the 'Full Contact Details' page in the NewOrg Management System. The browser address bar shows the URL: https://web3.neworg.com/MC2_Neworg/CustomIntake.asp?CustomerNum=398998&Action=View. The page header includes the NewOrg logo and the date 4/7/2022. The contact information is as follows:

- Contact Code:** 39899
- Assigned To:** Jared Ferguson
- Status:** Active
- Member of Groups:** Bogus, NewOrg Staff, SMS
- Prefix:** (empty)
- First:** Jared
- Middle:** (empty)
- Last:** Ferguson
- Suffix:** (empty)
- Work Phone:** 814-312-2575
- Home Phone:** (empty)
- Cell Phone:** 814-312-2575
- Role:** Consultant
- Title:** PM
- Company:** Neworg Management Systems
- Address:** 4000 albemarle Street NW
- City:** Washington
- State/Prov/Zip/Postal Code:** DC 20016
- Country:** USA
- Notes:** (empty)
- Work Phone:** 814-312-2575
- Home Phone:** (empty)
- Cell Phone:** 814-312-2575
- Allow SMS:** Blank
- Fax:** (empty)
- Email:** j.ferguson@Neworg.com
- Allow Email:** Approved
- Communication Preference:** Email
- Gender:** n/a
- Birth Date:** (empty)
- Source:** Call in - Unknown
- Type:** Individual
- Send Habitat Mail:**
- Approval:** Click here to sign
- Salutation:** (empty)
- Key Stakeholder?** Check box if yes

Scroll down the page to see all available Contact custom fields, clicking the '+' sign next to tabs to see additional fields.

Gender:

Birth Date:

Source:

Type:

Send Habitat Mail:

Approval:

Key Stakeholder? Check box if yes:

NewOrg Ambassador:

Support Admin:

Salutation:

Key Stakeholder Role:

DB Source:

Skype Name:

Time Zone:

Conference/Event Name:

Last Month of NewOrg Service:

Country (Non U.S.):

Linkedin Address:

Lead Cost (if paid):

Lead Value:

1 General Info

Implementation

Support

Save

Contact Face Sheet

On every Contact View, the Face Sheet button can be utilized to open the record to the Full Contact Details page where all available Contact Custom Fields will be displayed. Data entry or modification can be made on a single page within the Face Sheet for that Contact Record.

The screenshot displays the NewOrg Management System interface. The top navigation bar includes links for Home, Contacts, Events, Mail, Donations, Staff, Reports, Files, Billing, and Dashboard. The user is logged in as Jared Ferguson on Thursday, April 7, 2022. The main content area shows the 'Contact View' for contact #39899, which is active. The contact information includes: Jared Ferguson, PM, Neworg Management Systems, 4000 albarmarie Street NW, Washington, DC 20016, USA. Contact details include Work Phone (814-312-2575), Home Phone, Cell Phone (8143122575), Fax, Source (Call In - Unknown), Assigned To (Jared Ferguson), and Type (Individual). A red box highlights the 'Face Sheet' button in the top right of the contact view area, with a red circle containing the number 1. Below the contact details is a 'More Contacts' table with columns for Name, Map, Address, Phone, Email, Assigned To, Role, Status, Created, Support Admin, and Age. The table contains one entry for Ashley Law.

Name	Map	Address	Phone	Email	Assigned To	Role	Status	Created	Support Admin	Age
Ashley Law		1225 Marth Custis Drive Apt 914 Alexandria, VA 22302		aalaw525@gmail.com	Jared Ferguson	Partner	Active	05/28/2020		

Updating Full Contact Primary Status and SubContact Primary Status

For customers who use SubContacts and need to update the Primary Status for the Full Contact and the SubContact, the pencil icon on the Contact View next to the Status field can be clicked with an option to update SubContact as well.

The screenshot displays the NewOrg Management System interface. The main content area shows the 'Contact View' for contact #39899. A 'Select a Status' dialog box is open, allowing the user to update the status of the contact and its subcontacts. The dialog shows a table with columns for Name, Role, and Status, and a checkbox to 'Check sub contacts to also update.' The contact 'Jared Ferguson TEST' is selected with a status of 'Active'.

Name	Role	Status
Jared Ferguson TEST	*Unknown*	Active

More Contacts

Name	Map	Address	Phone	Email	Assigned To	Role	Status	Created	Support Admin	Age
Ashley Law		1225 Marsh Cussis Drive Apt 914 Alexandria, VA 22302		aalaw525@gmail.com	Jared Ferguson	Partner	Active	05/28/2020		

Customizable Intake Processes with Print Form QA

Custom Print Forms can be created in the system to assist with Intake Processes. Largely beneficial for customers where Intake is defined by multiple stages / activities in the NewOrg System. I.e. Events, Status', Survey / Forms etc.

WALK-THROUGH CASE MANAGEMENT CHECKLIST

INTAKE COUNSELOR: NewOrg Support
 INTAKE DATE:
 CLIENT NAME: PICT: David Crouch CASE NUMBER: DXC072370 DOB: 07/23/1970

INTAKE Steps/Progress	CASE COORDINATION Steps/Progress	THERAPY Steps/Progress
Create the Presenting Problems/Symptoms Assessment Form and document the Trauma Information on the last page. !	Create a Referral. !	Create a Therapy Note. !
Enter Initial Allegations. ✔	Create a Case Opened. !	Create the Treatment Plan. !
Alleged Perpetrator. !	Create an Initial Face to Face. !	Create the Therapy Discharge event. !
New DCF. !	Create an information and Referral (in person) Other Services. !	
New Law Enforcement. !	Assign Therapist. !	
Enter Academic Information. !	Create an Initial Trauma Evaluation. !	
Enter Developmental History. !	Create Vict. Comp. Claims. !	
Enter Family Background. !	Create Criminal/Civil Support - Notification of Events. !	
Enter Family. !	Create Personal Advocacy - Individual Advocacy. !	
Enter Legal Involvement. !	Create Psychological Testing. !	
Enter Medical History. !	Create DCF - CFARS. !	
Create Family History of Psychiatric Illness and Substance Abuse. !	Create DCF - FARS. !	
Create a CASA Assessment Form. !		
Enter Child and Family Strengths. !		
Enter Diagnosis and Therapy Type. !		

Differing areas of the intake process can be presented with links to click and navigate to that area of the system to complete the documentation. If an area is not completed, a red exclamation point can be displayed, if it is completed, a green check mark displays.

Print Forms

Sharing Contacts / Events Through the NewOrg Message Center

On the Contact View of every Contact record, the Message Icon will be displayed. Within every Event Details tab, the Message Icon will be displayed. These can be utilized to share a Contact and / or Event through the Message Center to a particular User or Channel.

Contact View –

The screenshot displays the NewOrg Management System interface. At the top, there are navigation tabs for Home, Contacts, Events, Mail, Donations, Staff, Reports, Files, Billing, and Dashboard. The user is logged in as Jared Ferguson on Thursday, April 7, 2022. The main content area is titled 'Contact View' and shows details for Contact #39899, Jared Ferguson, PM. A red box highlights the 'Message' icon in the top right corner of the contact details section. Below the contact details, there are tabs for 'More Contacts', 'Events', 'Donations/Payments', 'Project Benchmarks', 'Organization Information', 'Forms/Surveys', 'Notes', 'Mail', and 'Files'. The 'More Contacts' tab is active, showing a table with columns: Name, Map, Address, Phone, Email, Assigned To, Role, Status, Created, Support Admin, and Age. The table contains one entry for Ashley Law.

Name	Map	Address	Phone	Email	Assigned To	Role	Status	Created	Support Admin	Age
Ashley Law		1225 Marth Custis Drive Apt 014 Alexandria, VA 22302		aalaw525@gmail.com	Jared Ferguson	Partner	Active	09/28/2020		

Event Details –

The screenshot shows the 'Event Edit' page in the NewOrg Management Center. At the top, a yellow banner displays a conflict warning: 'The user Jared Ferguson has a conflict with this event.' Below this, the page title 'Event Edit' is followed by a 'Standard Summary' dropdown and several utility icons: Print, History, Outlook, and a messaging icon (highlighted with a red box and a red circle with the number '1'). To the right of these icons are tabs for 'Event Details', 'Contacts', 'Files', and 'Advanced'. The main form area includes a 'Create Recurrence' button, an 'Event:' text field, and a 'Contact:' dropdown set to 'Neworg Management Systems: Jared Ferguson (39899)'. The 'Type:' dropdown is set to 'Administration'. The 'Date:' is '04/07/2022', 'Start Time:' is '8:00 AM', and 'End Time:' is '9:00 AM'. The 'Minutes:' field is '60' and 'Remind me:' is '0 days before this event.'. The 'Description:' field is empty. The 'Assigned To:' dropdown is set to 'Jared Ferguson'. The 'Funding Source' table is as follows:

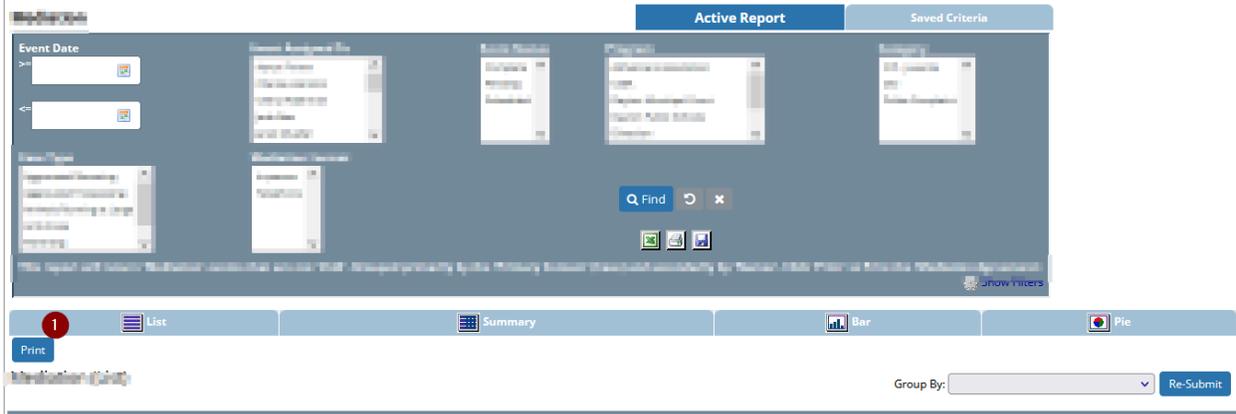
Name	Bill Type	Amount	
Implementation Contract	Daily	\$50.00	Delete

At the bottom, there are fields for 'Status:', 'Open/Closed:', and 'Access:'.

[NewOrg Messaging Center](#)

Adding Print Forms to Reports and utilizing the Print Button

NewOrg Print Forms can be created for many use cases, if wishing to print summary data about a particular Event or Contact record, Print Forms can be customized and added the report return display.



Reports Tab

Adding Dashboard Reports from the Summary, Bar, and / or Pie Chart Display within a Report

Within any report result when there is a grouping, the Summary, Bar, and Pie chart tabs are available. The Add to Dashboard button will be available under the Summary or images.



The screenshot shows a report interface for 'Open Support Tickets (Summary)'. At the top, there are tabs for 'List', 'Summary', 'Bar', and 'Pie'. The 'Summary' tab is active. Below the tabs, there is a 'Group By:' dropdown menu and a 'Re-Submit' button. The main content area displays a table titled 'Grouped By Support Ticket Age' with the following data:

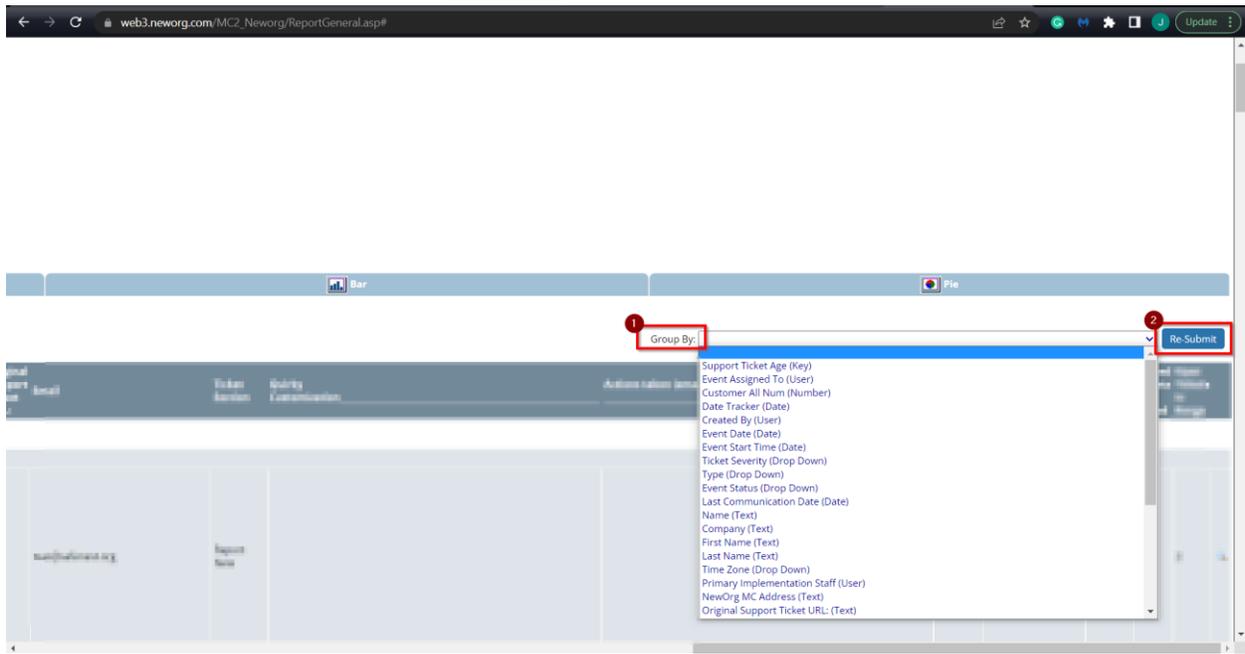
Support Ticket Age	Count	Number of Days Opened (Sum)
Less Than 2 Weeks	6	24.00
Less Than 2 Months	7	242.00
Over 2 Months	3	416.00
Total (Distinct: 3)	16	682.00

Below the table, there is an 'Add to Dashboard' button with a red circle and the number '2' next to it.

Dashboard reports are user specific and can be copied from one user to another user via an Admin privilege setting.

Utilizing the Re-Group feature within Report Results

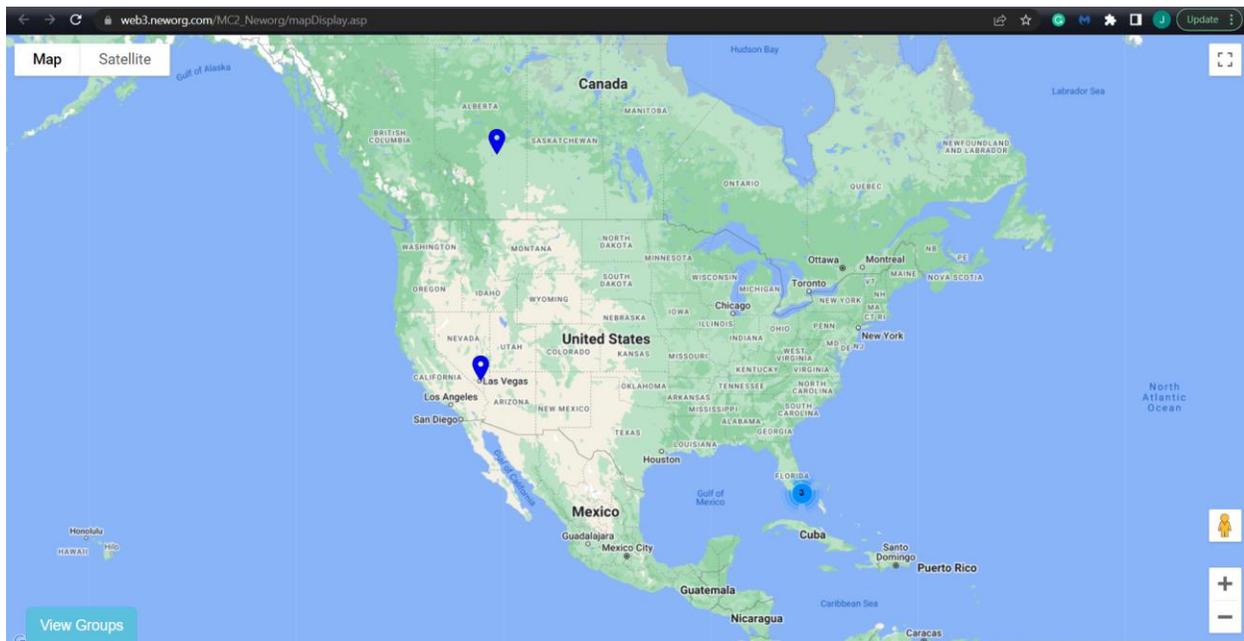
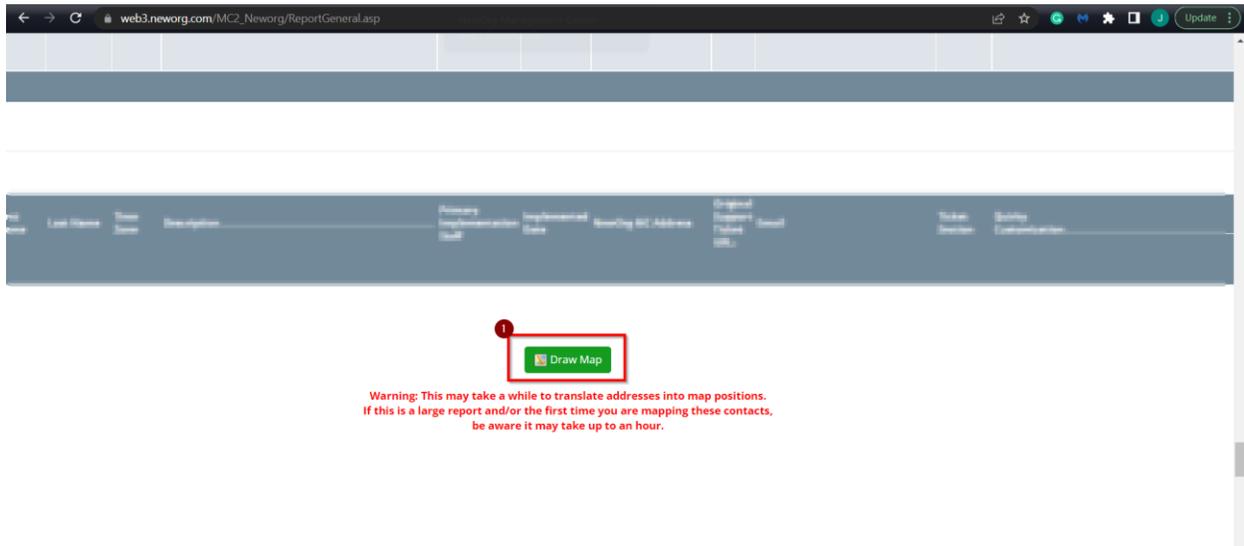
Within reports results, on the right-hand side of the display, there is a Group By dropdown. This dropdown will include each returned column in the report. Select a column to re-group by and click Re-Submit.



Once the report results, utilize the Summary, Bar, and / or Pie charts to see the distinct counts and summary information.

Adding Draw Maps to Reports Results

On any NewOrg System, the Draw Maps feature can be added to the Report Results display to geo-locate the contact returned in the reports address and pin those within Google Maps. Beneficial for viewing and illustrating locations of clients, activities, or services delivered.



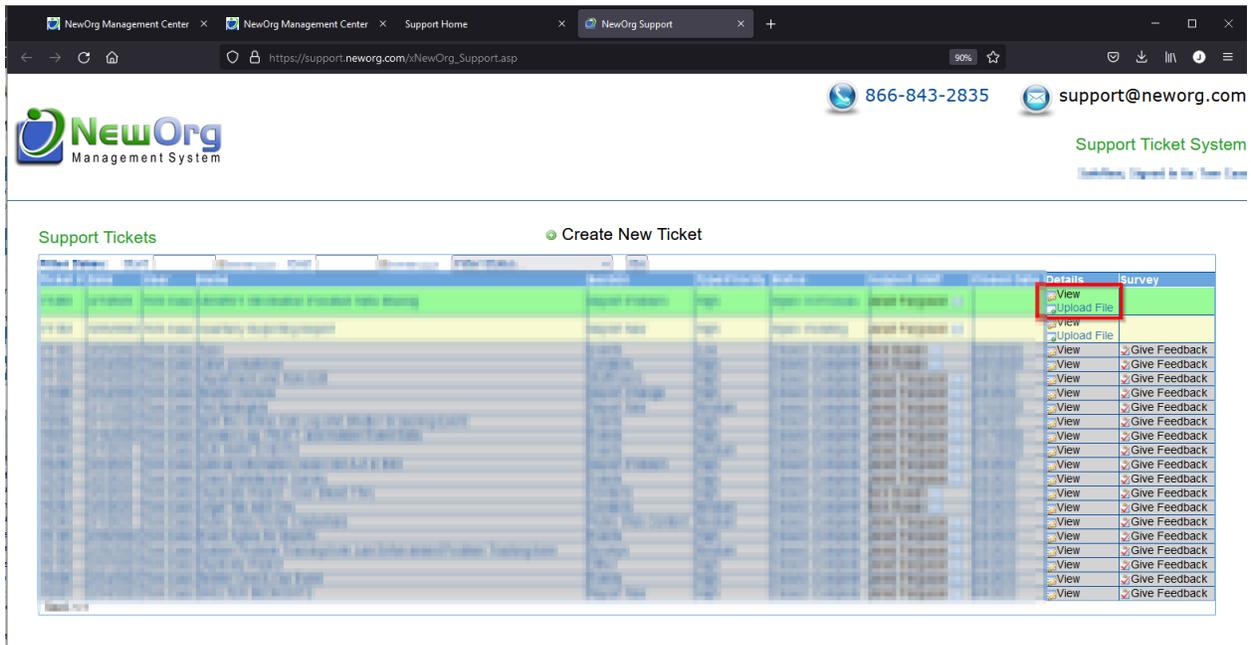
Viewing the Settings area and Billing Summary to Track Outbound SMS and Video Conferencing

Within the Settings button, at the top left-hand side, there is a Billing Summary button. Within this area, outbound SMS and Video Conferencing usage can be monitored.

The screenshot shows the NewOrg Management System interface. At the top, there is a navigation bar with 'Web Content', 'Settings', 'Logout', and 'Change Password'. Below this is a secondary navigation bar with 'Home', 'Contacts', 'Events', 'Mail', 'Donations', 'Staff', 'Reports', 'Files', 'Billing', and 'Dashboard'. A yellow notification banner at the top right states: "Please Note: SMS and Video Conferencing services will continue to be free until at least June 30, 2021. An announcement will be sent out 30 days prior to any change in billing policy for these services. There will never be any charge for File Sharing." The left sidebar contains 'Contacts' and 'Project Benchmarks' sections. The main content area is divided into four panels: 'SMS History', 'Video Conferencing', 'File Sharing', and 'Medical Billing'. The 'SMS History' panel shows a cost of \$0.00 at \$0.03 per SMS message, 10 SMS messages sent, and a warning limit of 1000. The 'Video Conferencing' panel shows a cost of \$0.00 at \$0.50 per video hour, 0 video hours sent, and a warning limit of 50. A gauge for SMS usage is also visible, showing 10 out of 1000. Red callout boxes with numbers 1 through 4 highlight the 'Settings' button, the 'Billing Summary' button, the 'SMS History' panel, and the 'Video Conferencing' panel respectively.

Uploading a File or Image to a Support Ticket

Support Tickets are the preferred method of communication for submissions of questions or adjustments. Within each customer's Support Ticket Area, a new Support Ticket is created through the Create New Ticket button. Within the Support Ticket a File or Image can be uploaded.



Support Ticket System