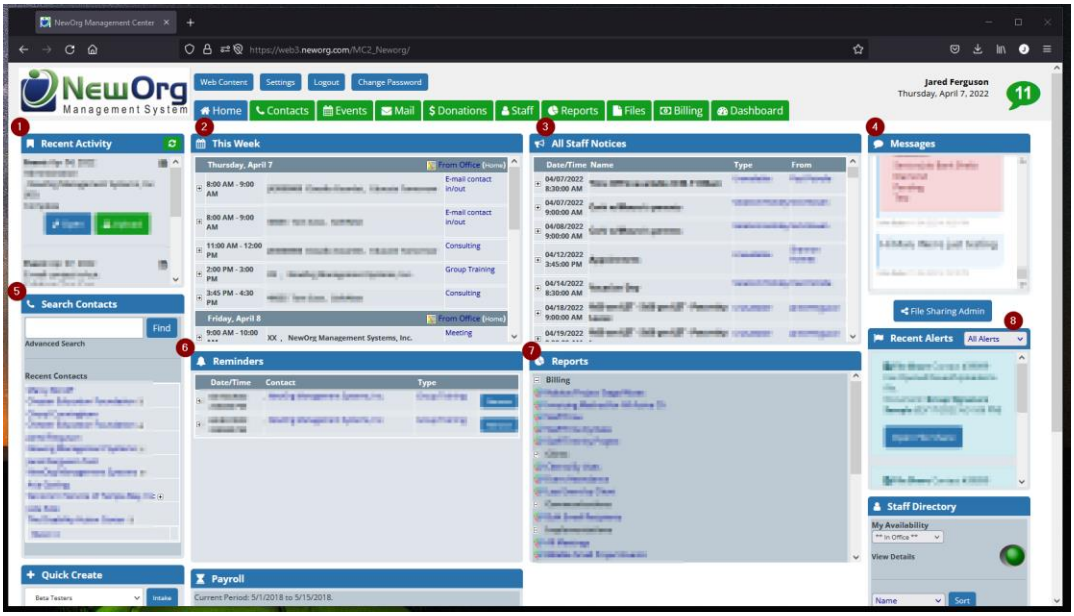
Hidden Gems - Contact View display logic. Mapping on reports. Home tab, tips, and tricks

Contents

Home Tab Functionality

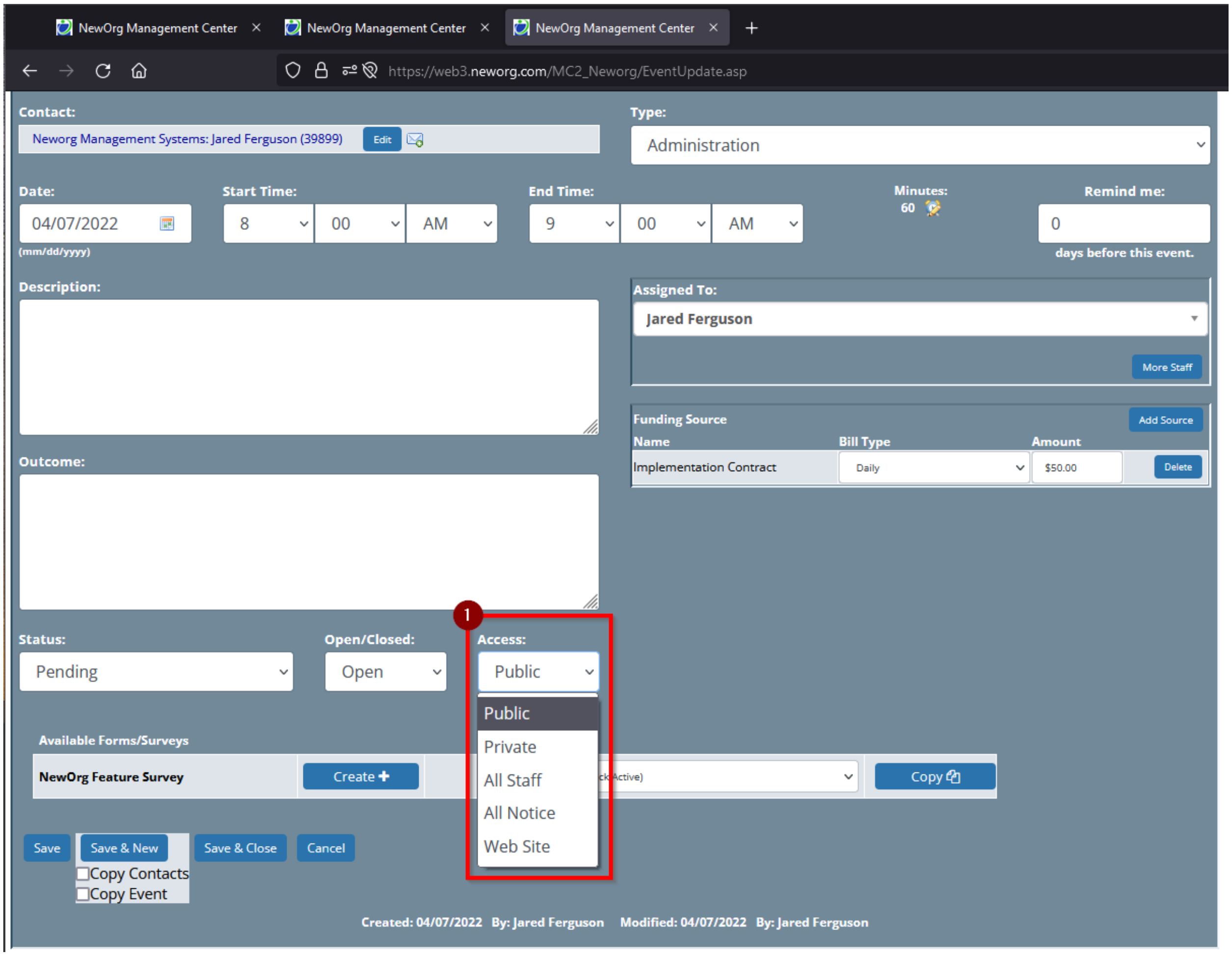


1) Recent Activity - Events, Contacts, Files, Forms etc. that have been opened or edited recently.
2) This Week – Events starting with today and through the next week where the User logged in is the Event Assigned To. Can be utilized for scheduling this week and managing daily activities.
3) All Staff 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 work-flow 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]

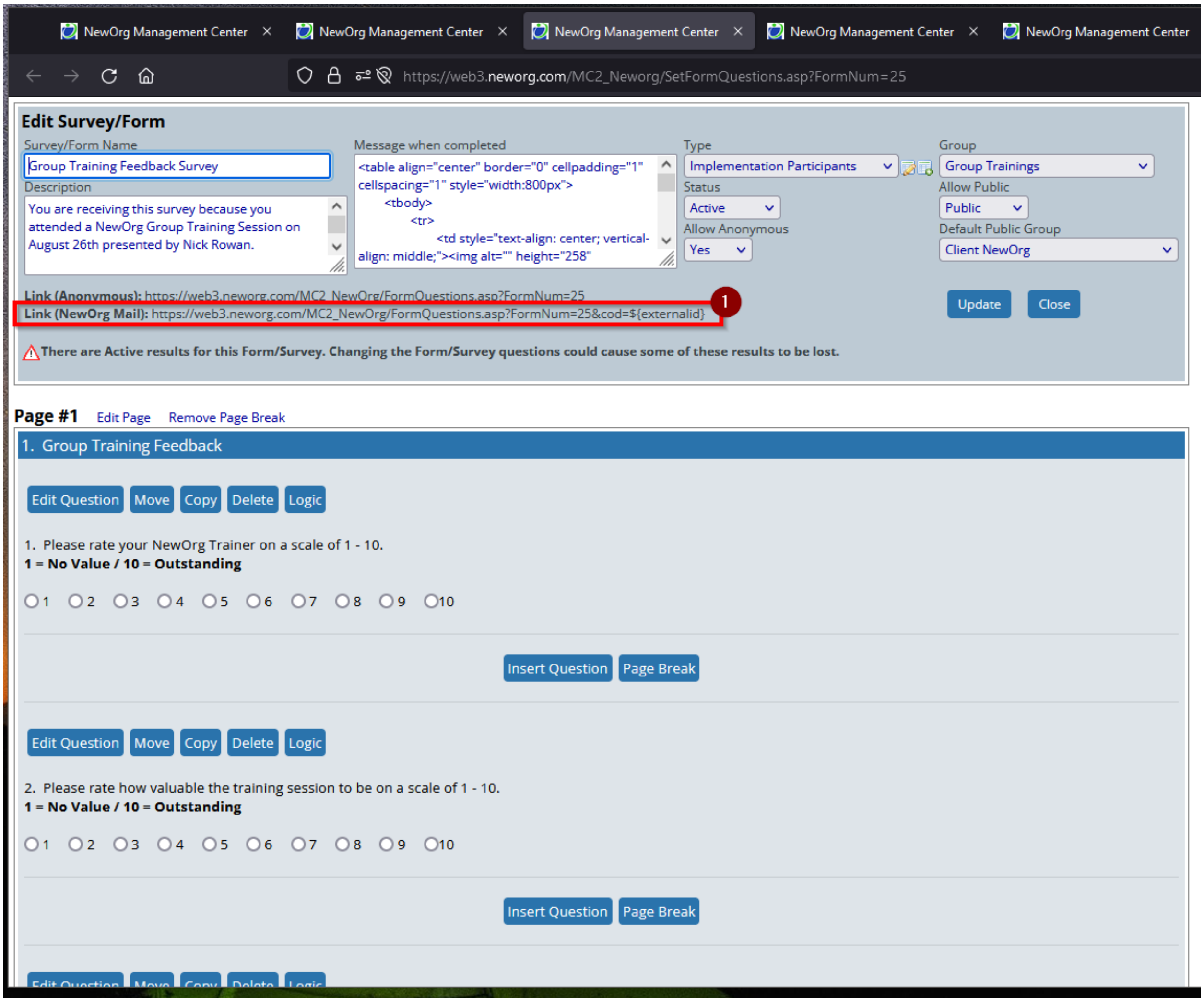
Using All Notice / All Staff within an Event Details tab

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).

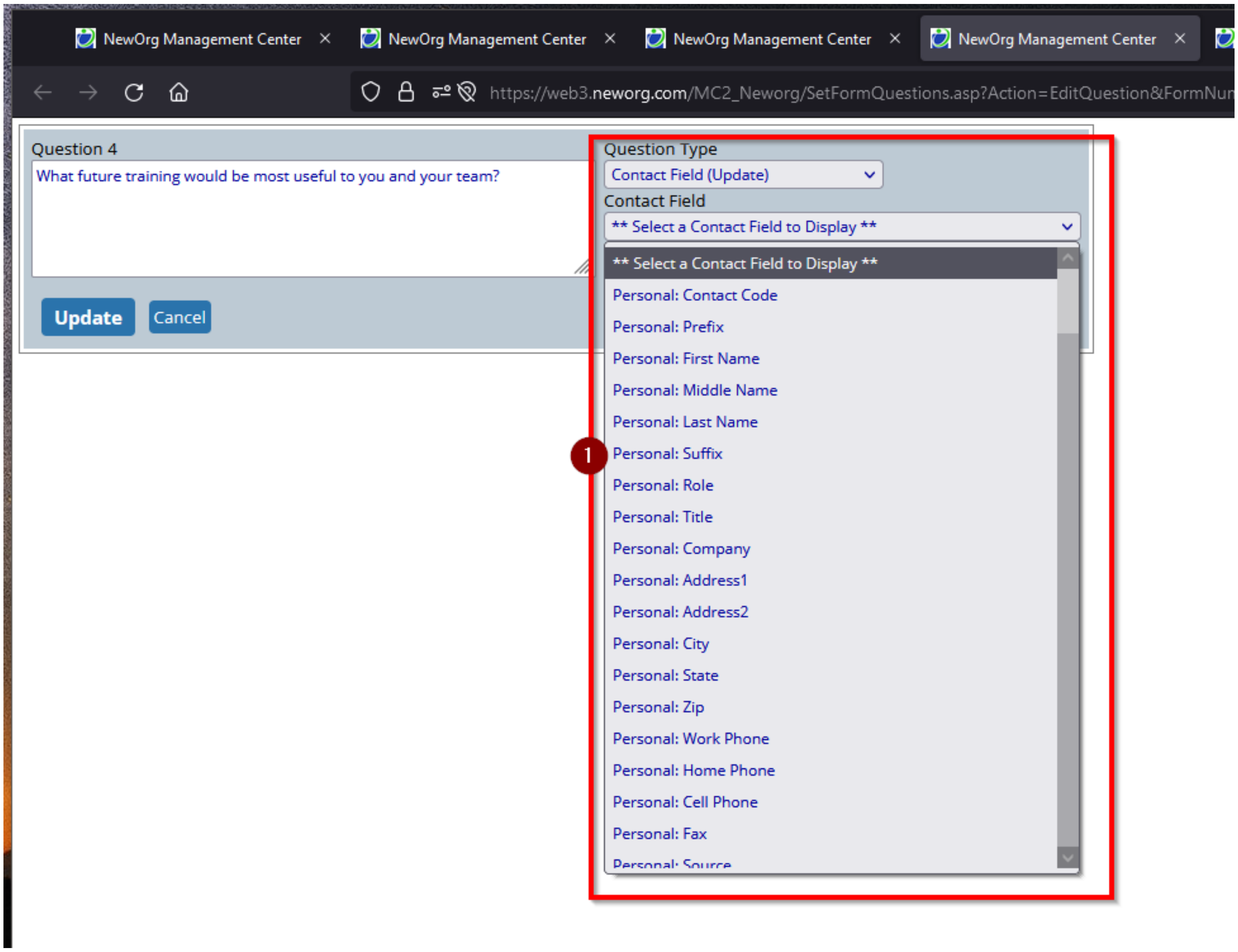


Using Survey / Forms through NewOrg Email to Request Contacts to update their Contact Information

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.

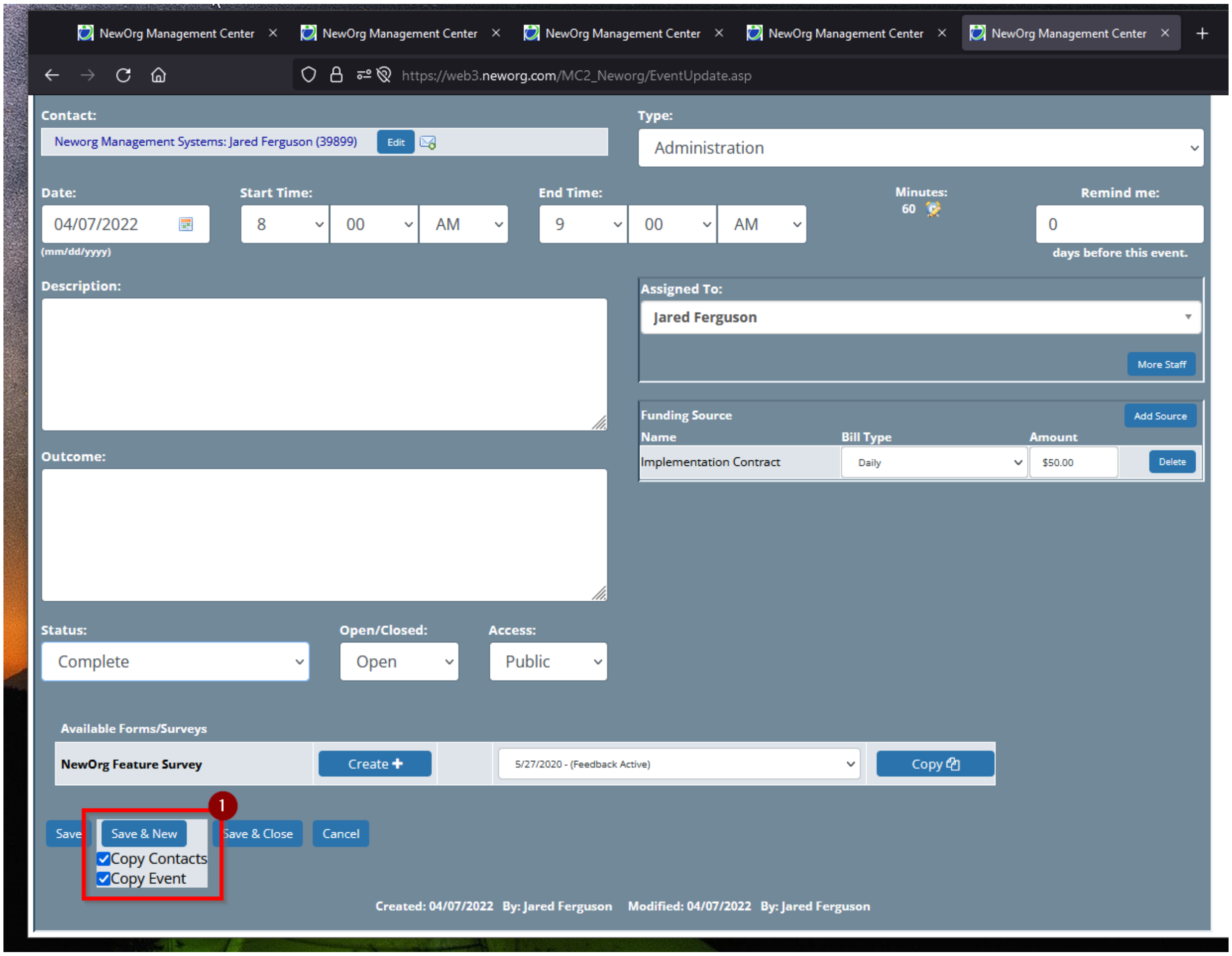


Questions within the Survey / Form can be set as Update Contact in the Question Type and select the Contact Field within the Contact Field dropdown.



Sending Surveys Through NewOrg Mail

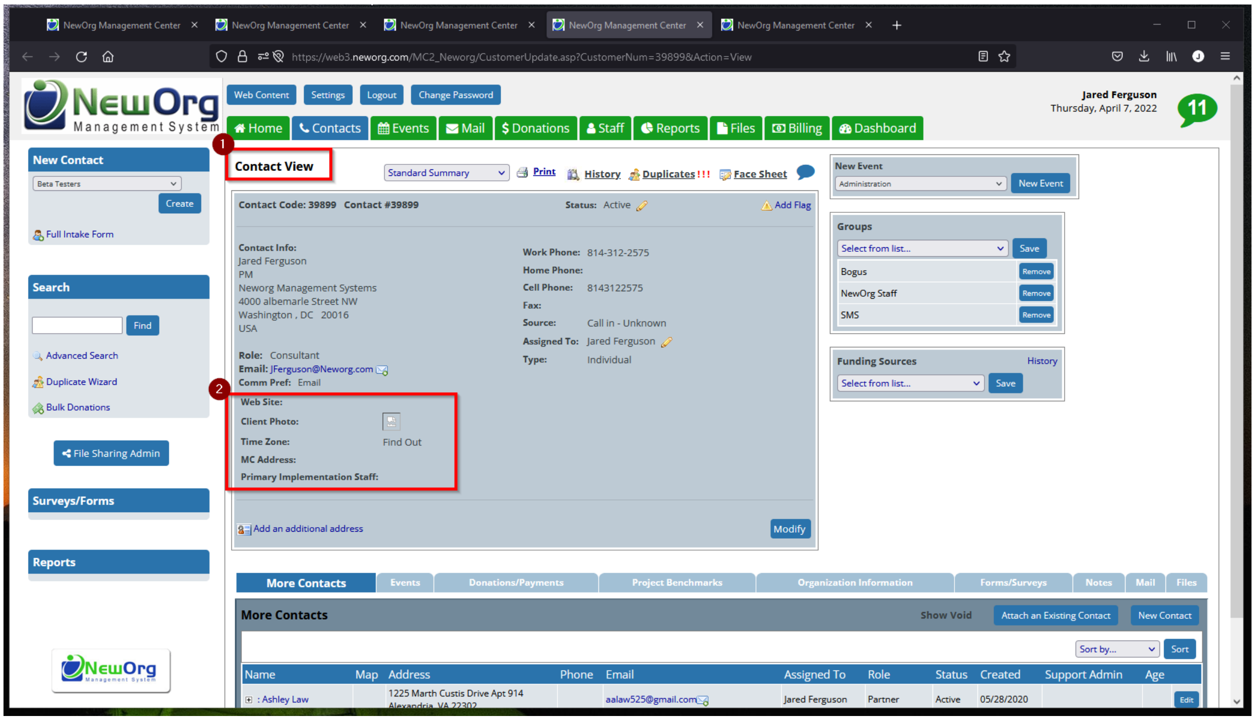
Utilizing the Copy Contact / Copy Event – Save & New on Event Details to Enter Data Quickly



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.

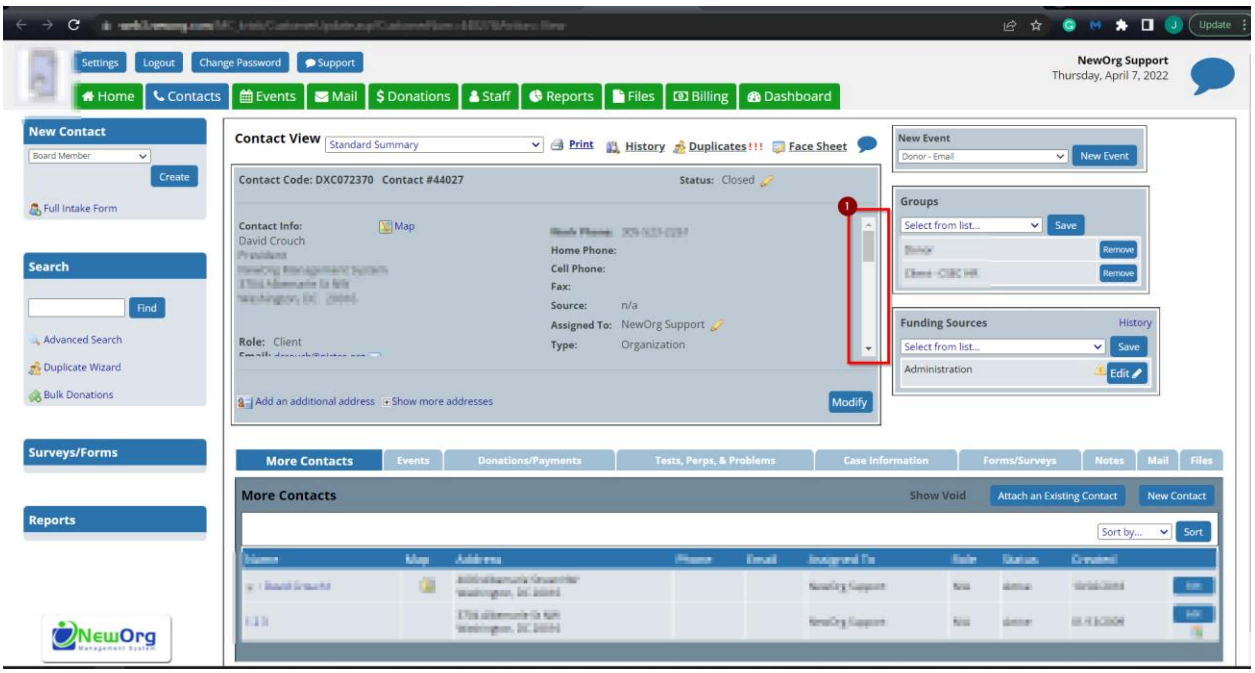
Note: Contact View Display Fields will be visible for All Contacts, regardless of Contact Group.

[Contact View Screen]

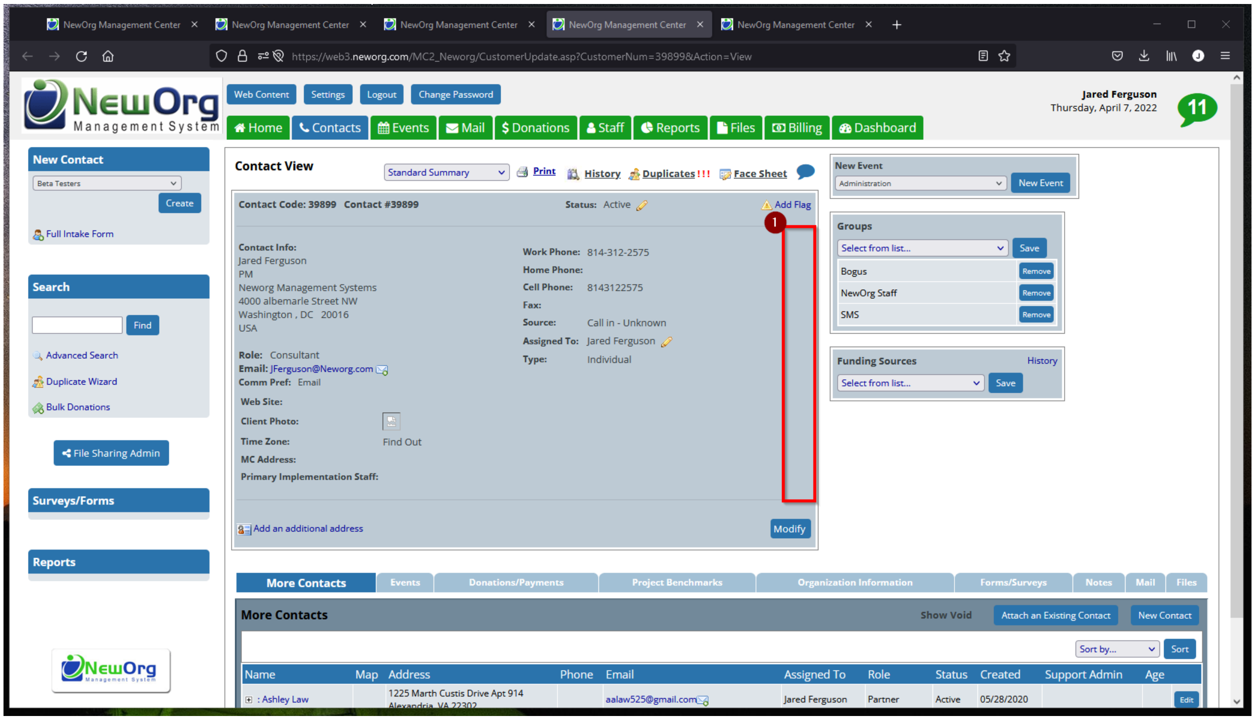
Contact View Expand

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) –

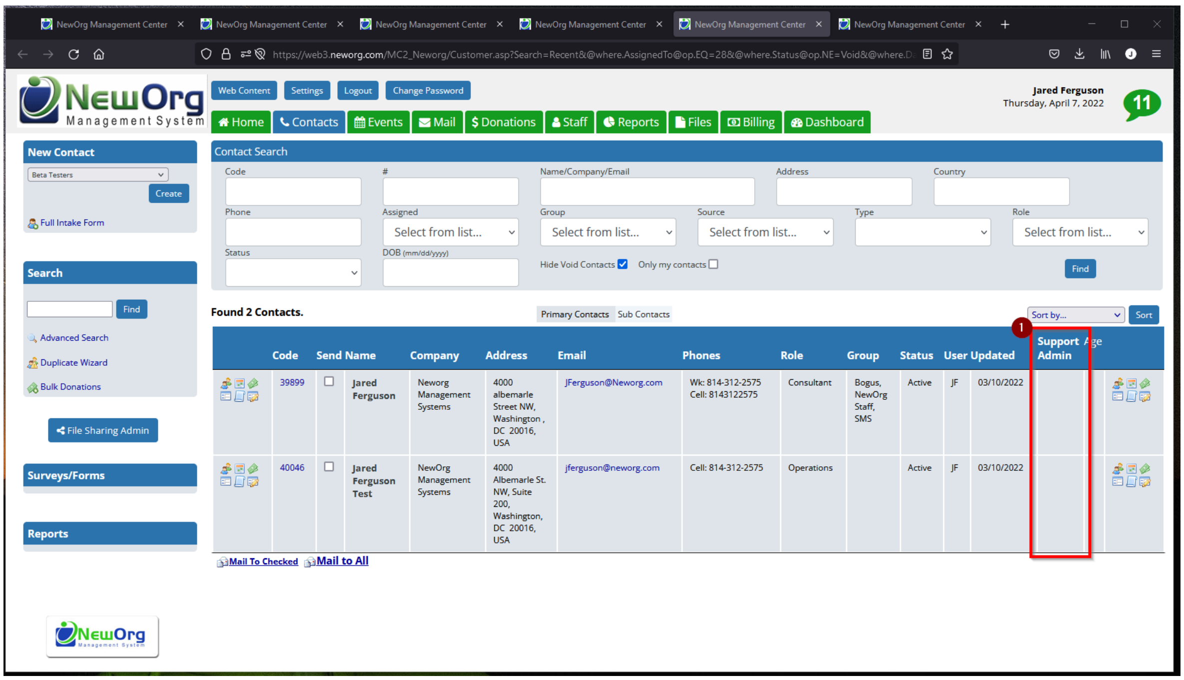


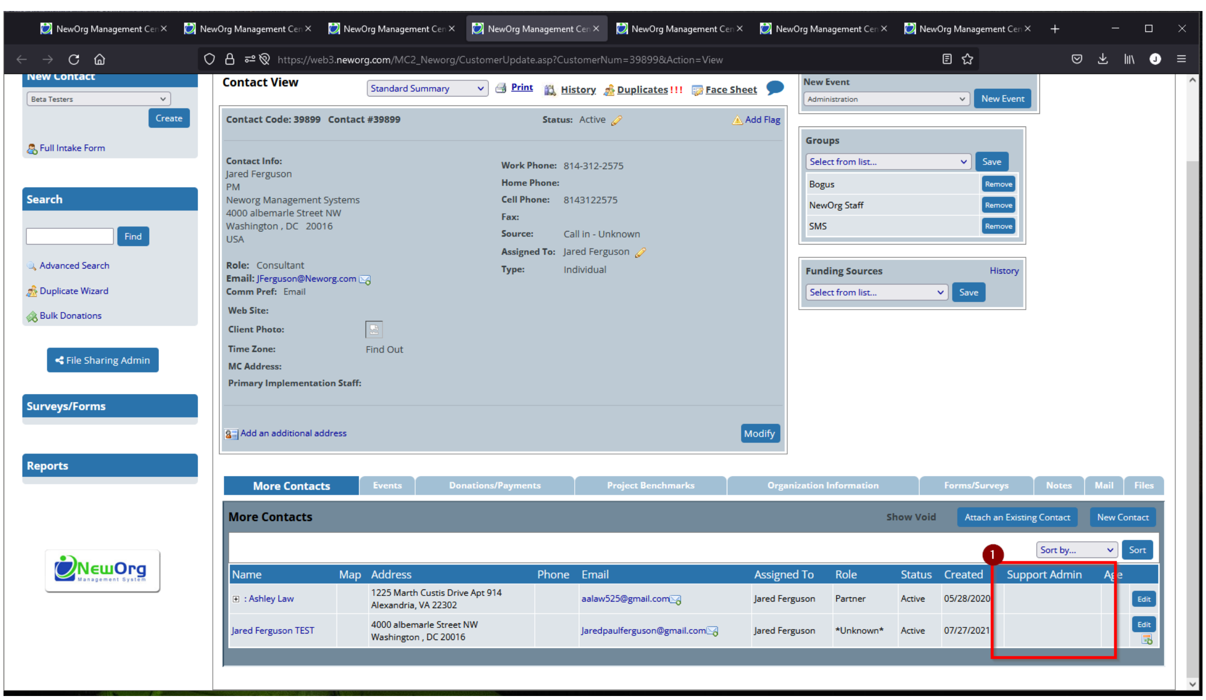
Example of Contact View Expanded (No Scroll Bar) –



Contact Search Results Display

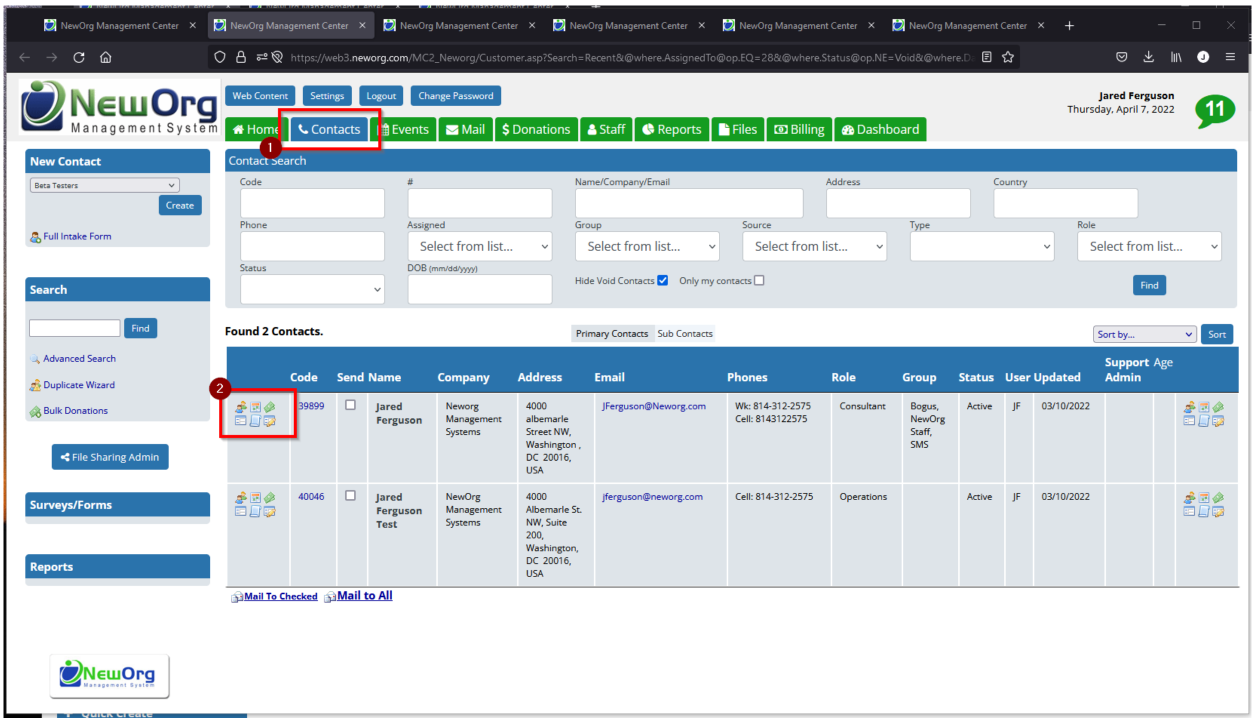
Within the Contacts tab of the system in Contact Results, and within the More Contacts tab of the Contact View of individual Contact records, a single custom field can be added.





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.

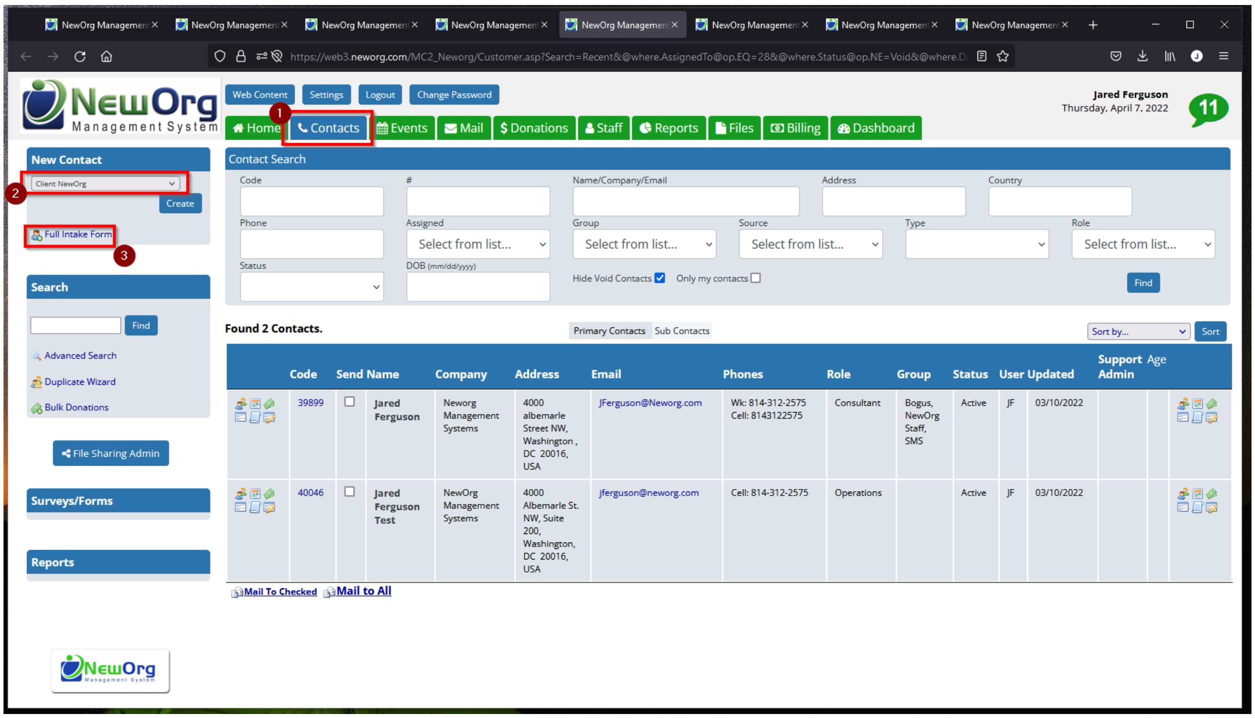


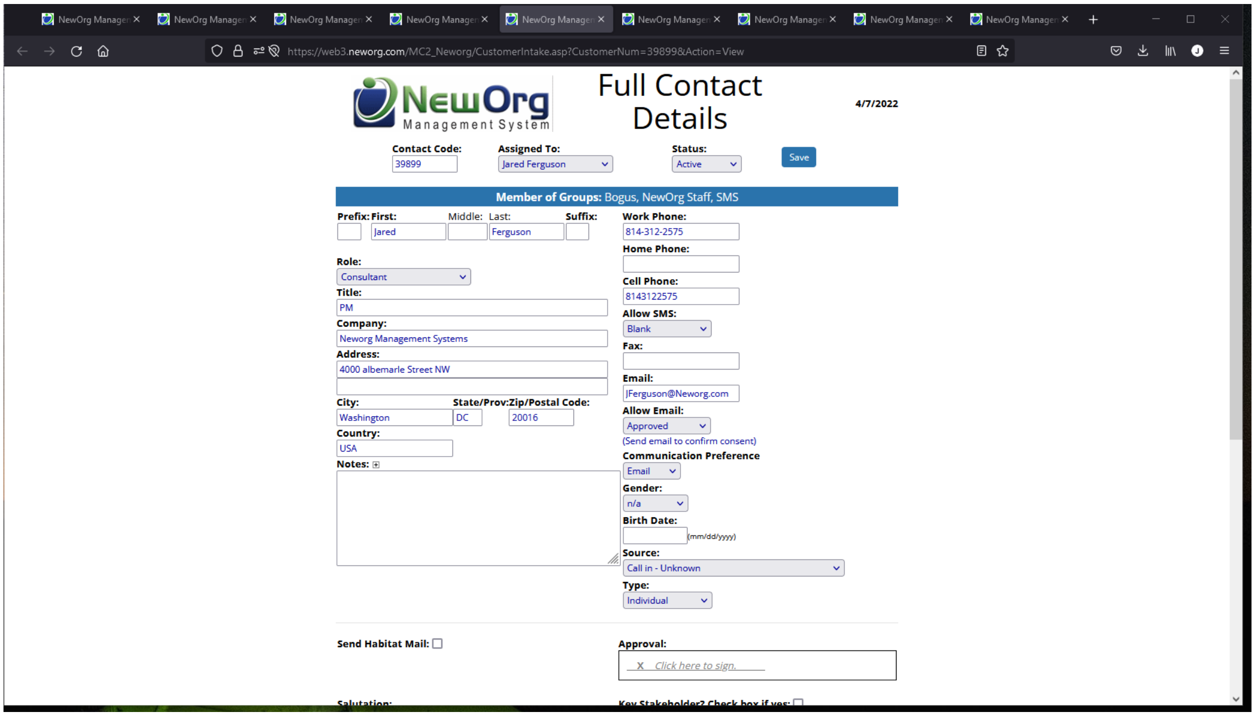
Contacts Tab

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.

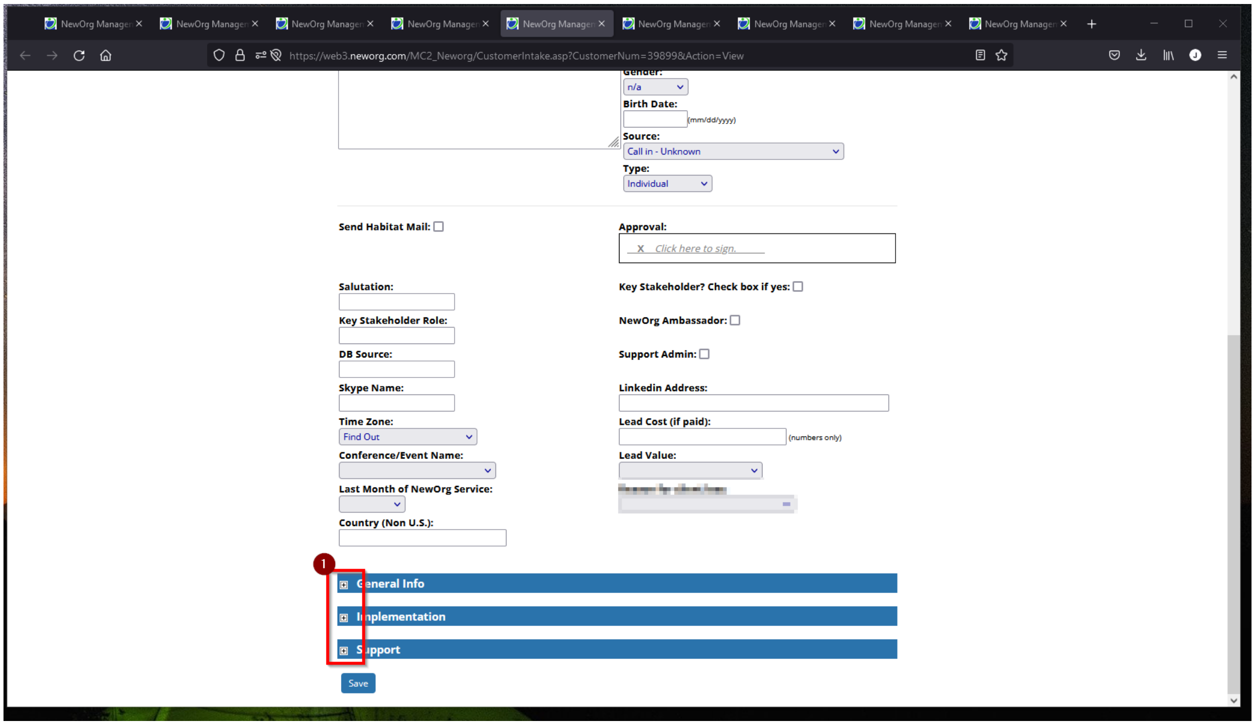
This process allows for All Contact Custom Fields available to the Contact Group to be displayed for the Contact record on a single page.





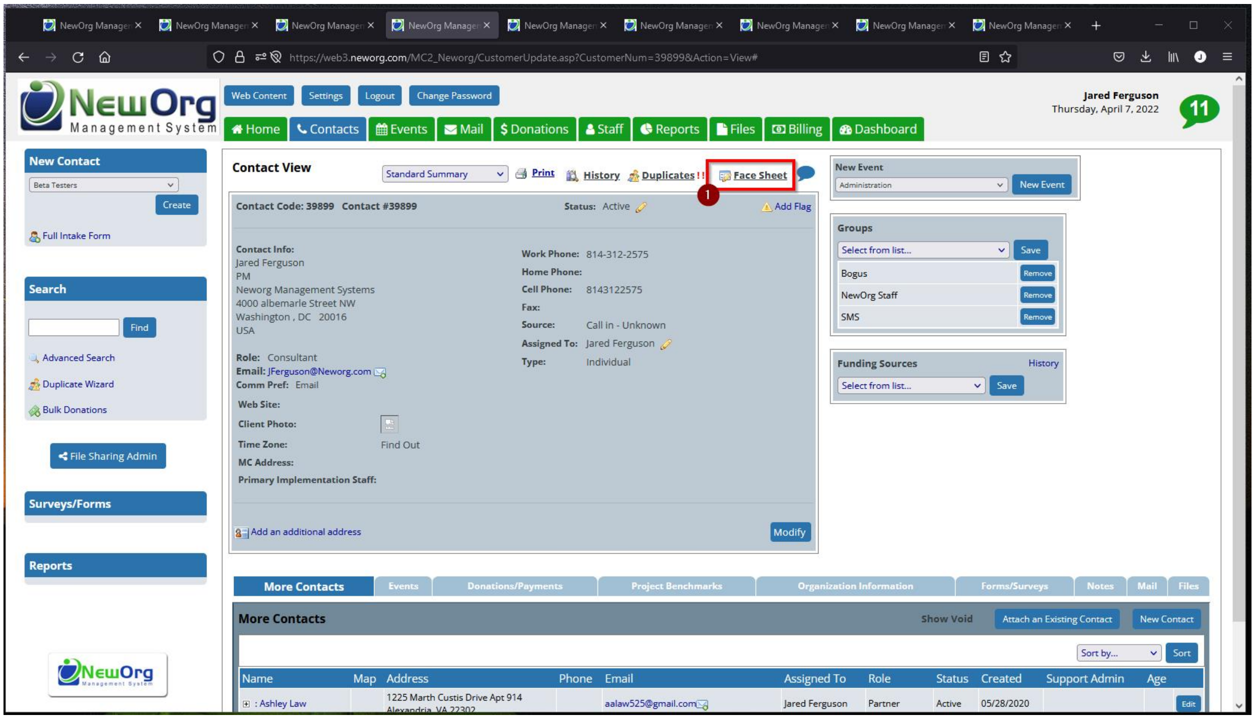
Scroll down the page to see all available Contact custom fields, clicking the ‘+’ sign next to tabs to see additional fields.

NewOrg 4.7.22


https://web3.neworg.com/MC2_Neworg/CustomerIntake.asp?CustomerNum=39899&Action=View
Gender:
n/a
Birth Date:
(mm/dd/yyyy)
Source:
Call in - Unknown
Type:
Individual
Send Habitat Mail:
Approval:
X Click here to sign.
Salutation:
Key Stakeholder? Check box if yes:
Key Stakeholder Role:
NewOrg Ambassador:
DB Source:
Support Admin:
Skype Name:
Linkedin Address:
Time Zone:
Find Out
Lead Cost (if paid):
(numbers only)
Conference/Event Name:
Lead Value:
Last Month of NewOrg Service:
Country (Non U.S.):
1
General Info
Implementation
Support
Save

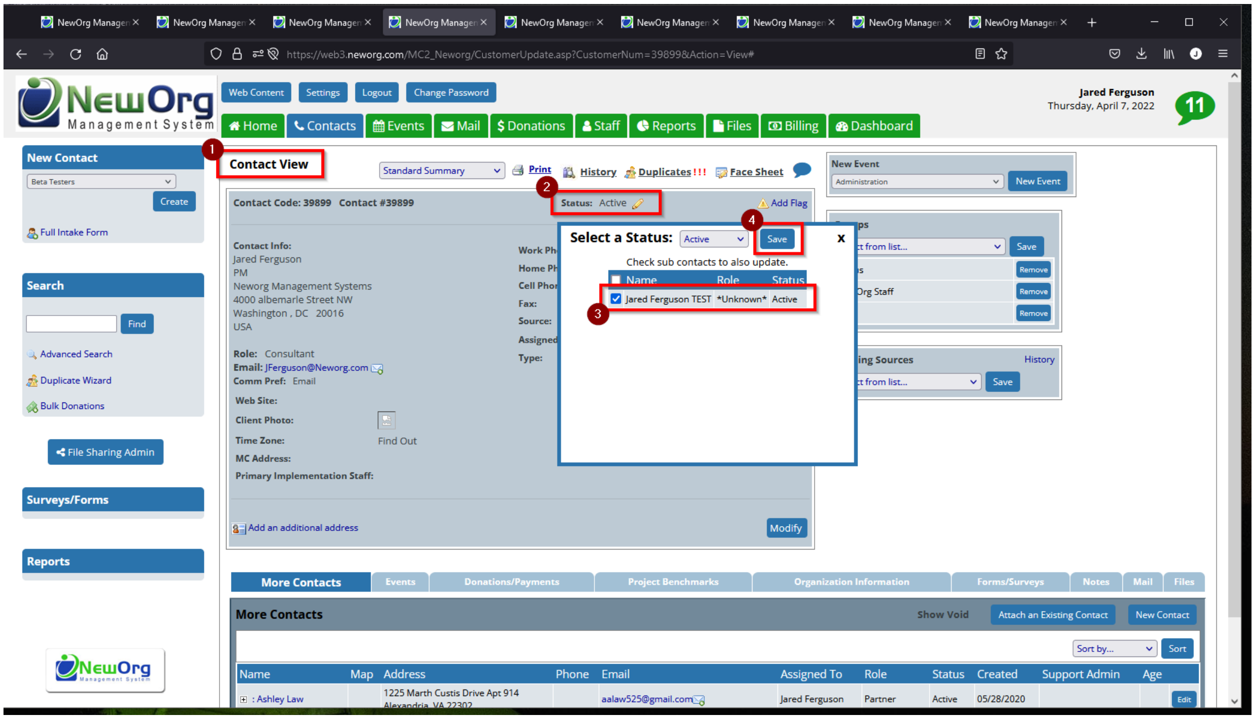
Contact Face Sheet

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.



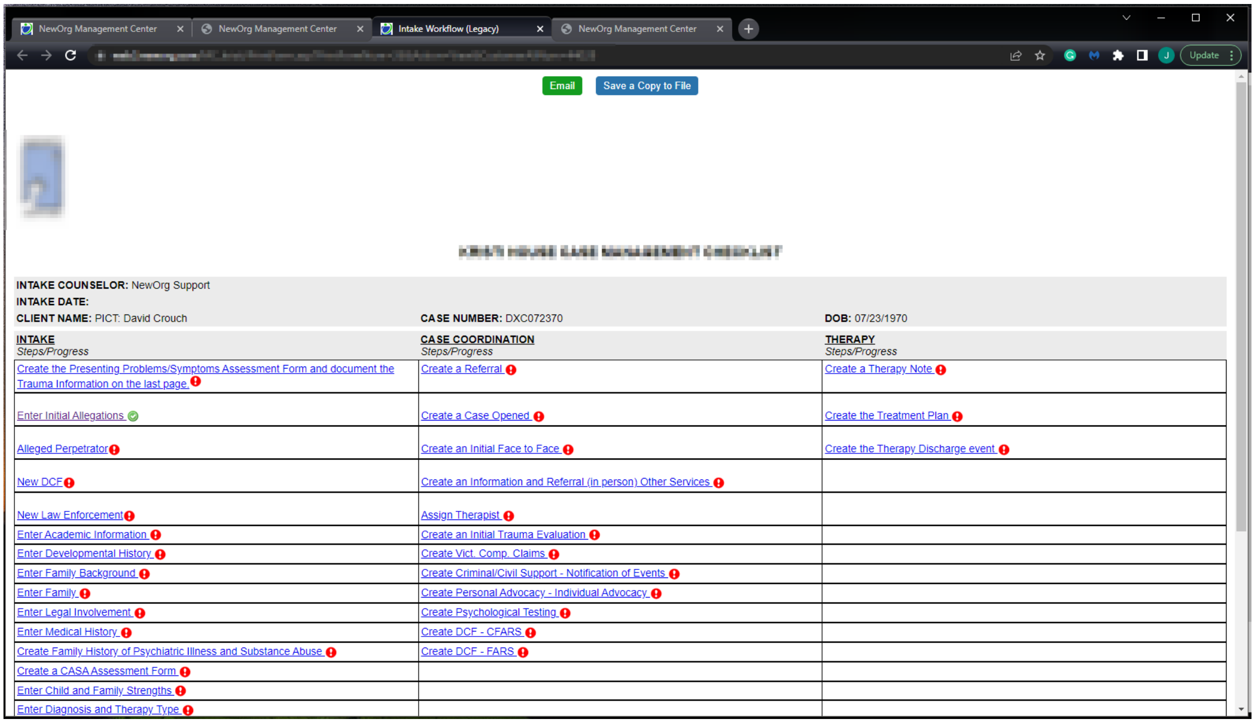
Updating Full Contact Primary Status and SubContact Primary Status

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.



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.



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		

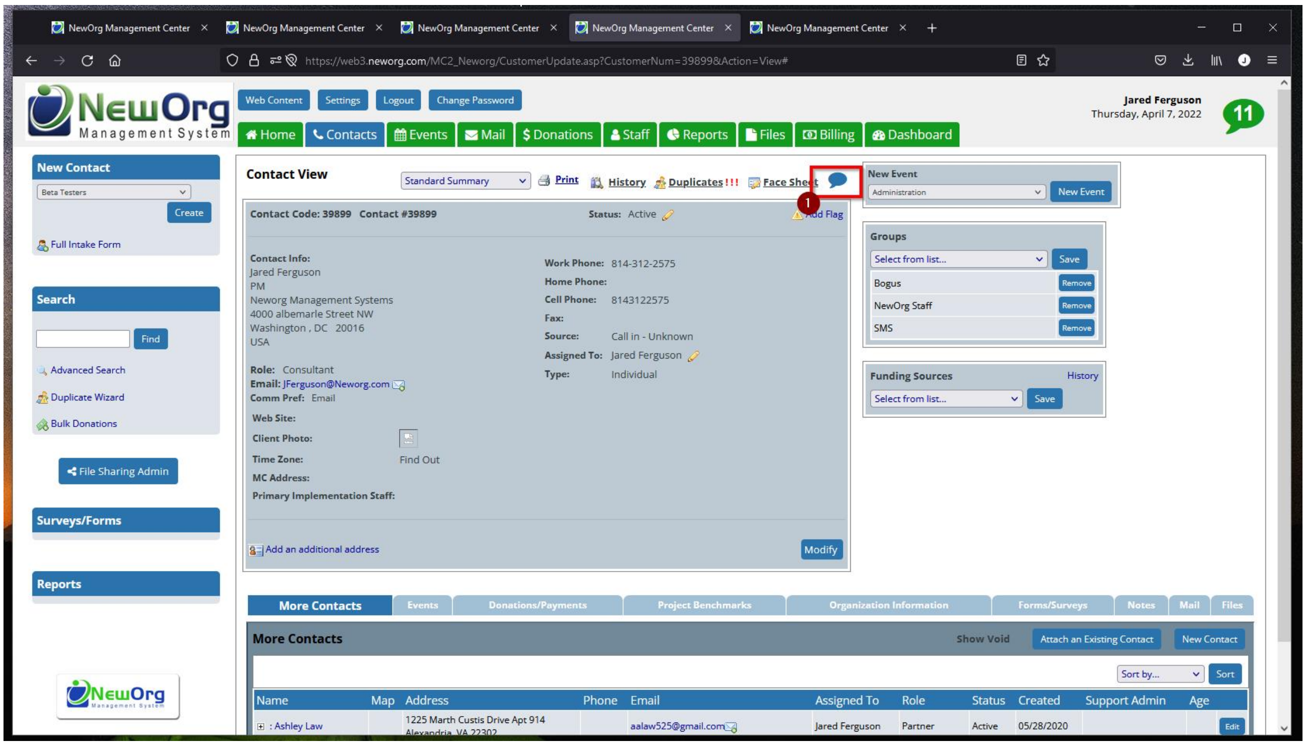
Differing areas of the intake process can be presented with links to click and navigate to that area of the system to complete the documentation. If an area is not completed, a red exclamation point can be displayed, if it is completed, a green check mark displays.

Print Forms

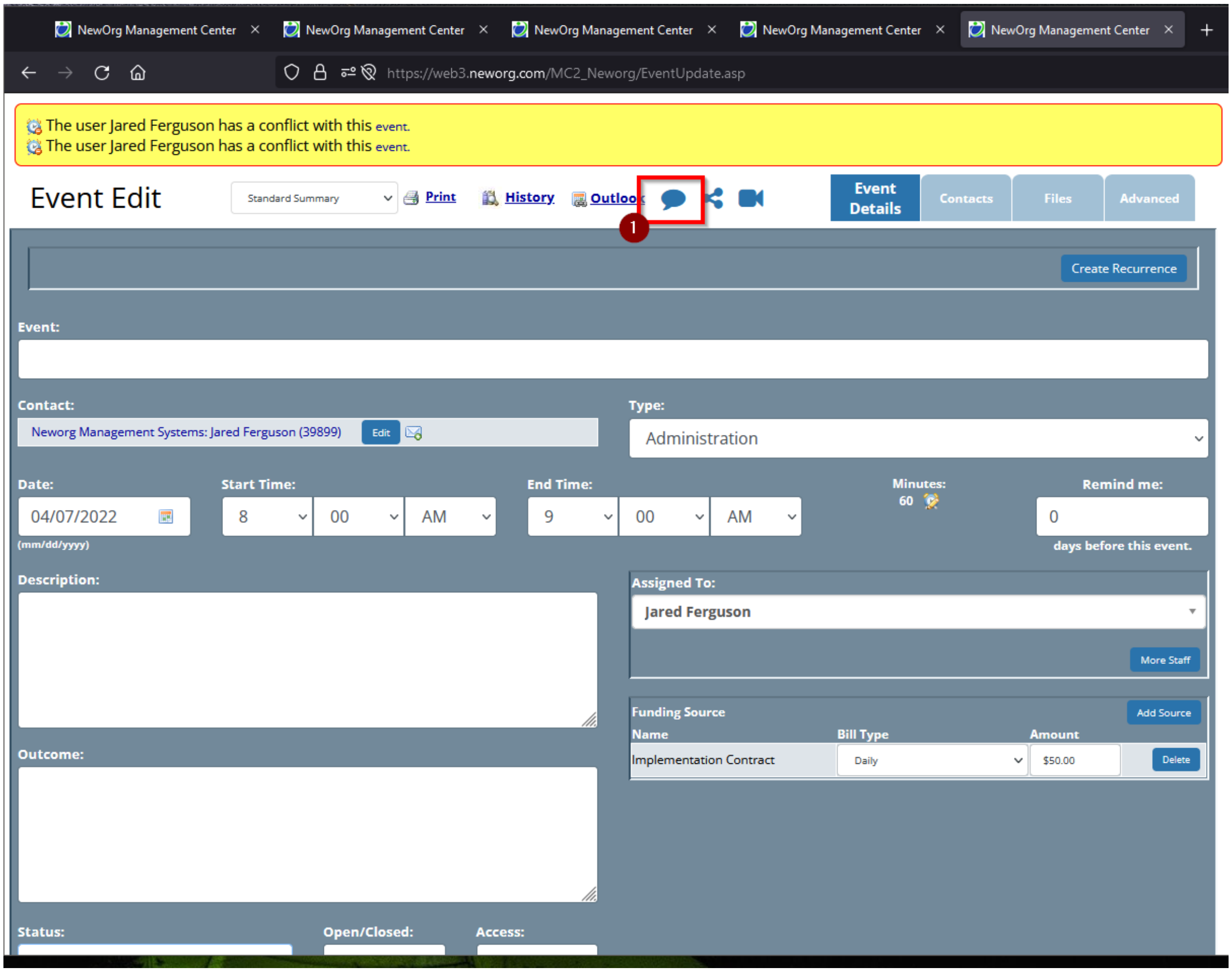
Sharing Contacts / Events Through the NewOrg Message Center

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 –



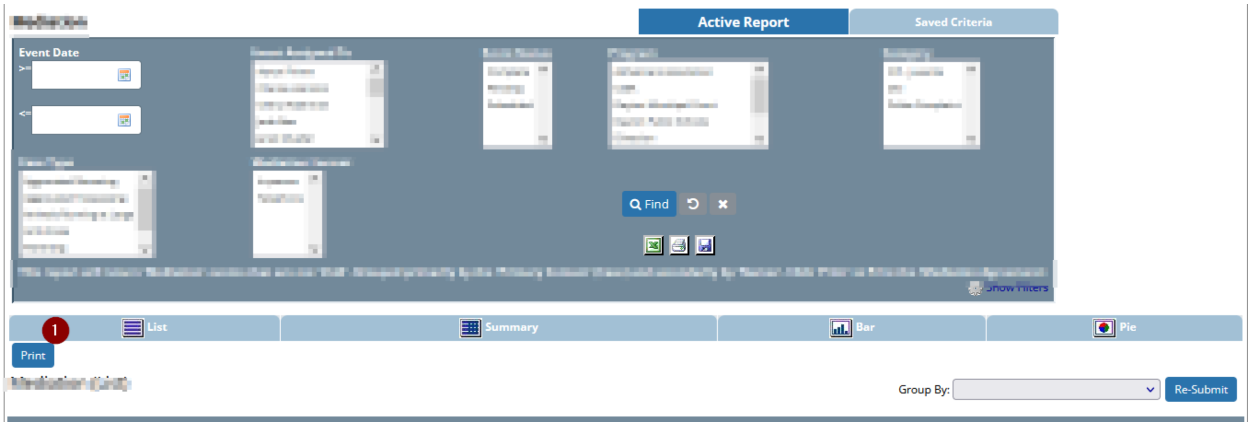
Event Details –



[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]

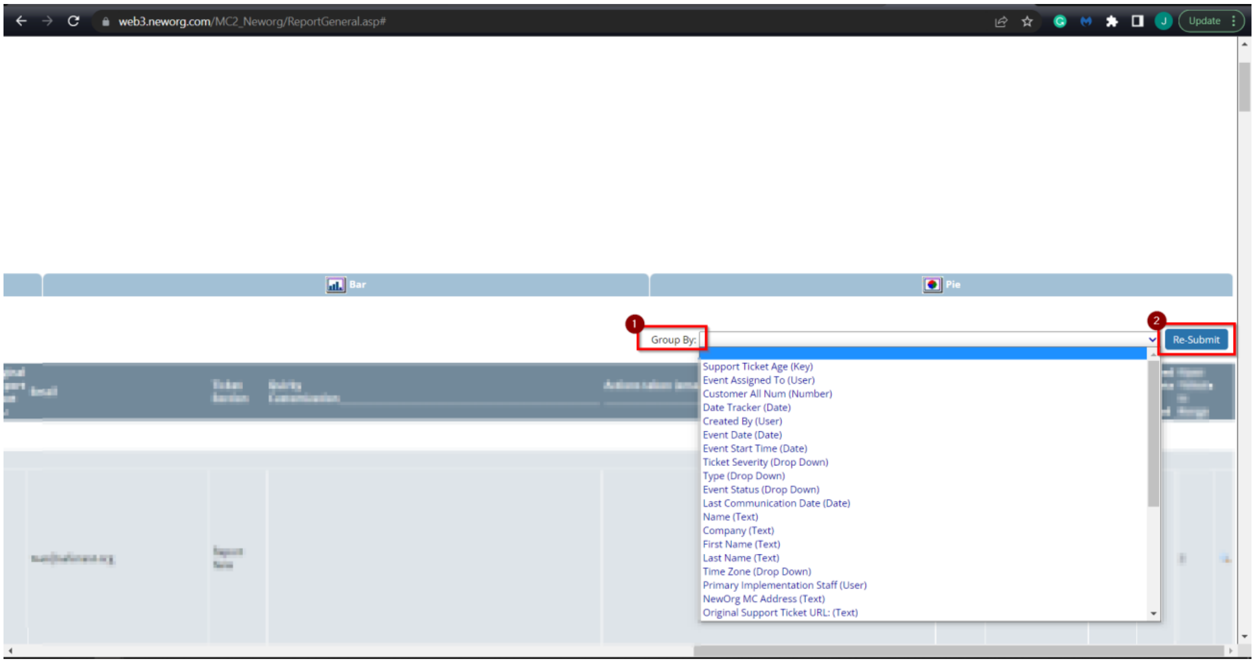
Adding Dashboard Reports from the Summary, Bar, and / or Pie Chart Display within a Report

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.

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

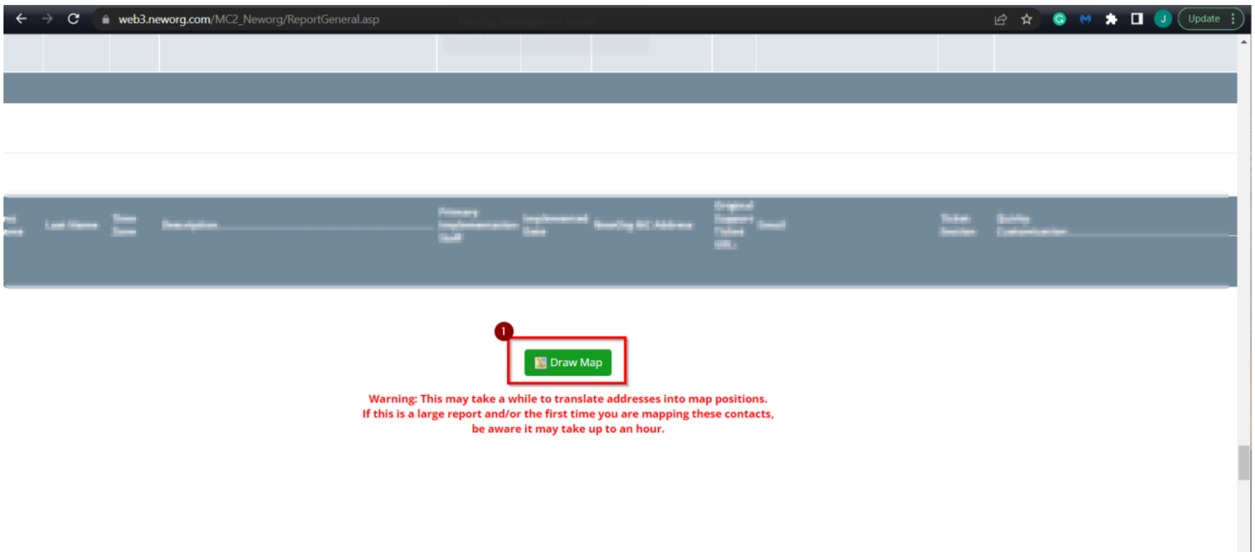
Within reports results, on the right-hand side of the display, there is a Group By dropdown. This dropdown will include each returned column in the report. Select a column to re-group by and click Re-Submit.

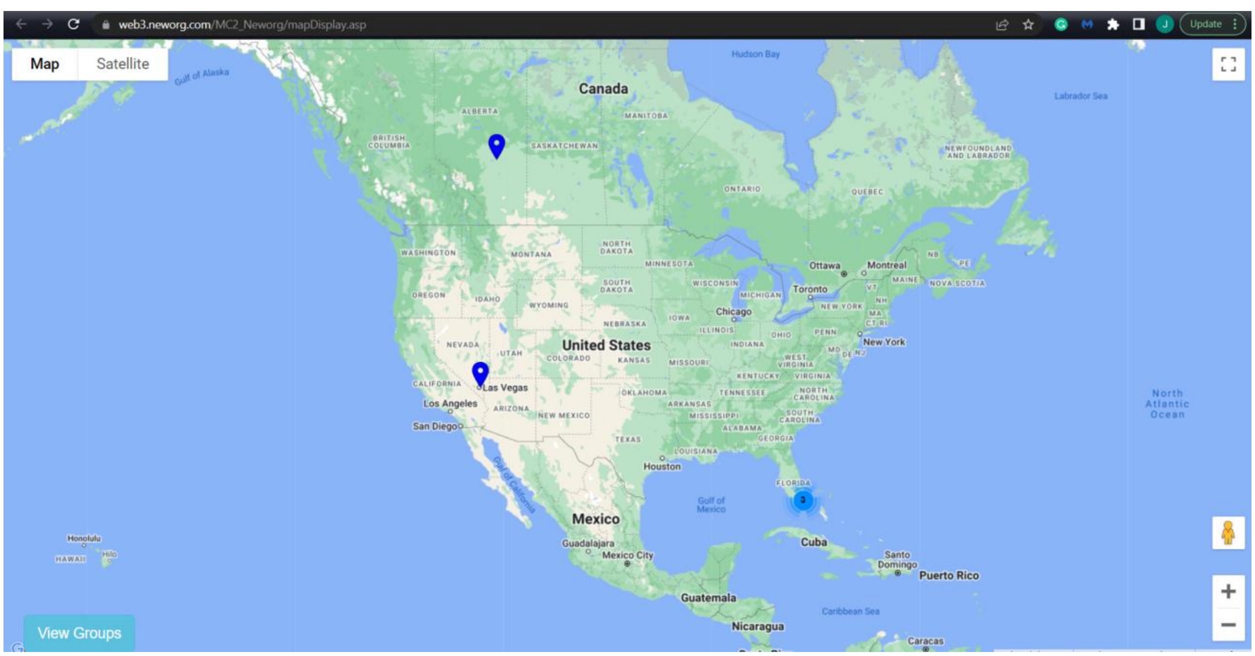


Once the report results, utilize the Summary, Bar, and / or Pie charts to see the distinct counts and summary information.

Adding Draw Maps to Reports Results

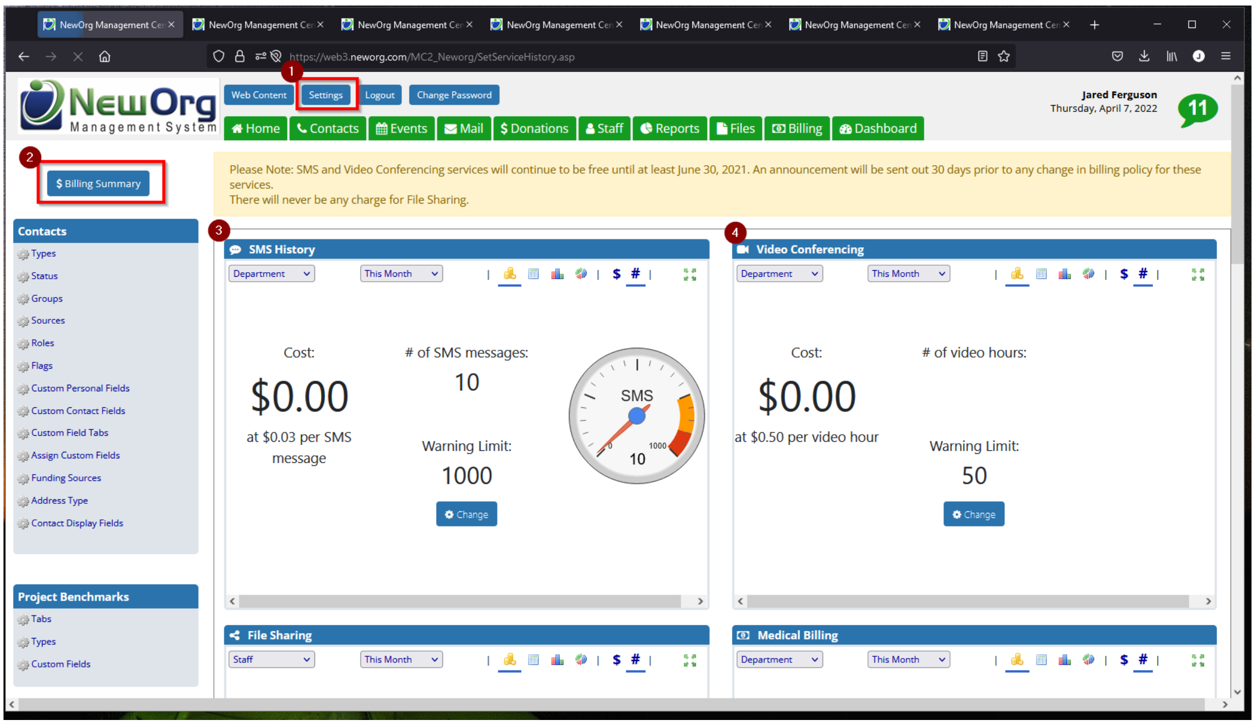
On any NewOrg System, the Draw Maps feature can be added to the Report Results display to geo-locate the contact returned in the reports address and pin those within Google Maps. Beneficial for viewing and illustrating locations of clients, activities, or services delivered.





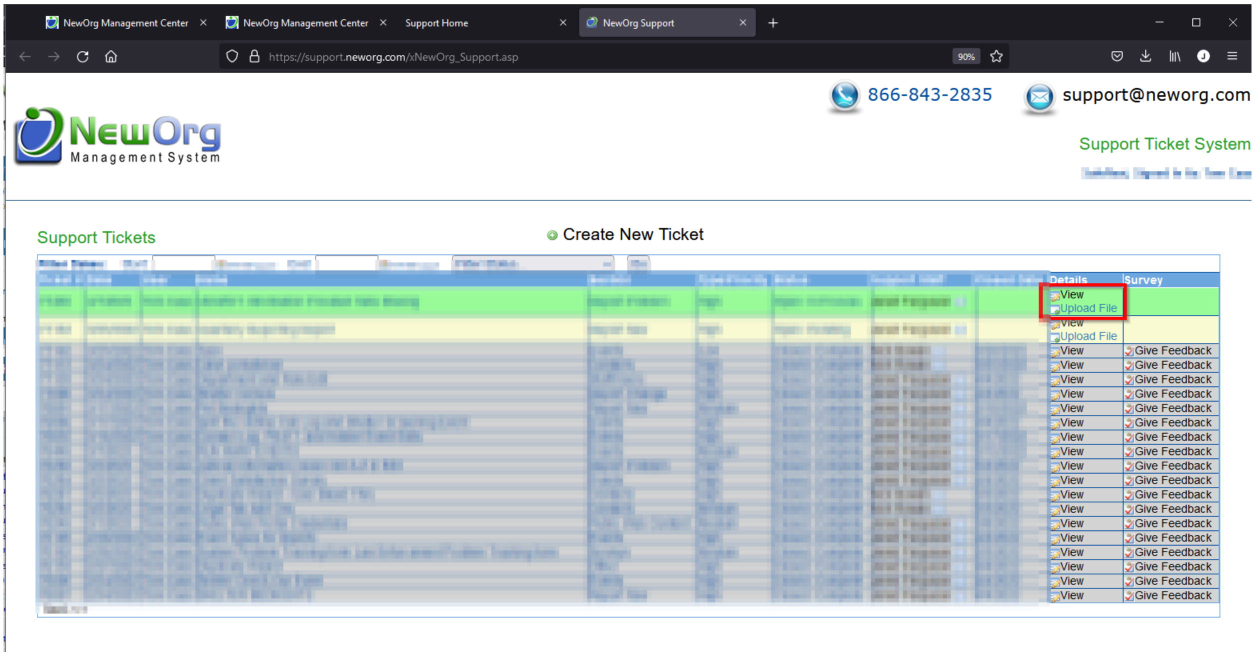
Viewing the Settings area and Billing Summary to Track Outbound SMS and Video Conferencing

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.



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 customers 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