



Focused View for Administrators

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Focused View

The focused view feature organizes contacts and identifies highest value actions—and prioritizes contacts accordingly. As an administrator, you can create and prioritize standard contact views for your organization. These views use filtering and sorting rules to draw from each user’s contact list to show that user a list of only those contacts who match the rules for the view. This gives your users a *focused view* into their contact list, showing them people who would be worthwhile to get in touch with for some reason, such as being eligible to refinance. In addition to these lists of contacts, focused view also gives your users quick access to the pertinent information they need to understand each contact’s situation before reaching out to them.



On their Focused View page, users in your organization see the views you create in the same priority order you set. You can create as many views for your users as you like. A given contact for a user only appears in the highest priority view on the user's Focused View page—even if that contact qualifies for multiple views—so prioritization is important.

Creating a View

As an administrator, you do all the building and managing of standard views on the Focused View Builder page. Navigate to **Manage Marketing → Focused View Builder**. To create a new view, click the **+Add View** button in the upper-right corner of the page. A new block with the default title New View is added to the top of the list.

Note

A new view is immediately given the label *Error*. A view must have a title, at least one inclusion rule, and at least one outcome defined before it can be published. The default title is sufficient, but it should be changed to something meaningful.

Tip

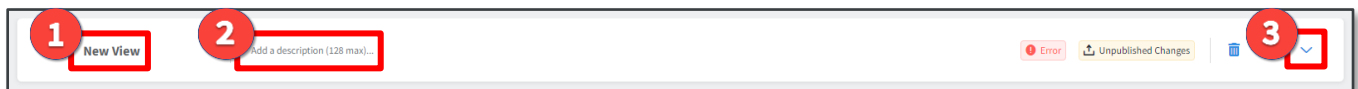
You may see some pre-defined views before you begin creating your own. Feel free to study how these views are defined to help you understand the available options.

All users with administrator privileges will see all the standard views created in their organization on this page, including those created by other administrators, even if they have not been published yet.

Title and Description

End users do not see any of the rules defining a standard view unless they use it as the basis for a custom view. However, they do see the title and description you provide, so it is important to provide descriptive text to help them understand what the intent of each view is.

1. Click on the text **New View**, clear this default title, and enter a suitable title for the view.
2. Click on the **Add a description (128 max)...** text placeholder and enter a suitable description.
3. The view is expanded by default; you can collapse or expand the view's box by clicking the **View Details** arrow button at the right end of the box. To define the remaining parts of the view, the box must be expanded.



Column Selection

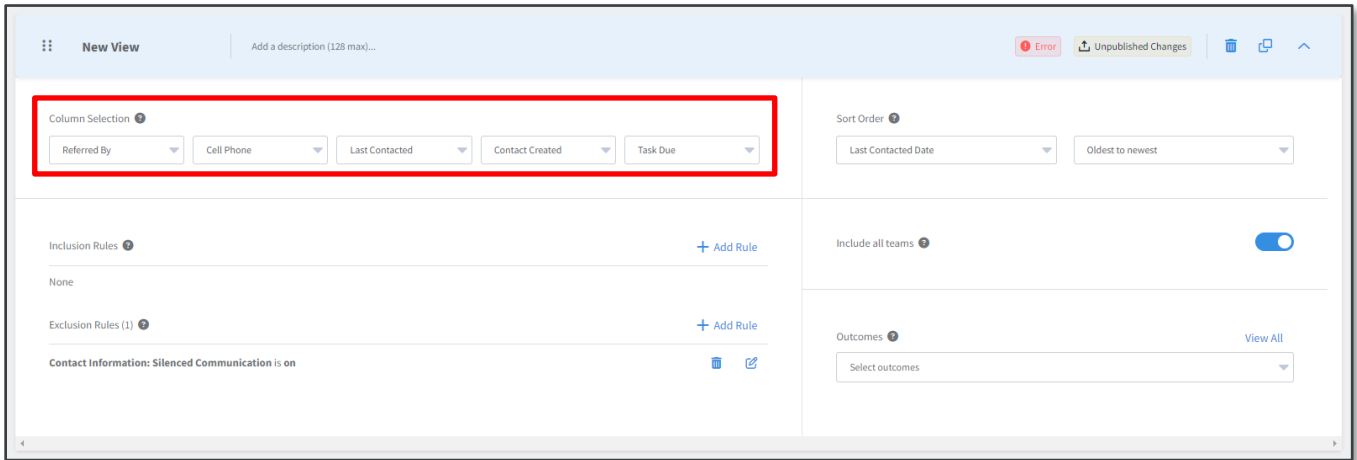
Note

The Column Selection portion is controlled by permission and may not be available to your organization.

As an administrator, you can define the 5 primary columns of data shown to an end user in a standard view. You can select different columns for each view, depending on the purpose and needs of each.



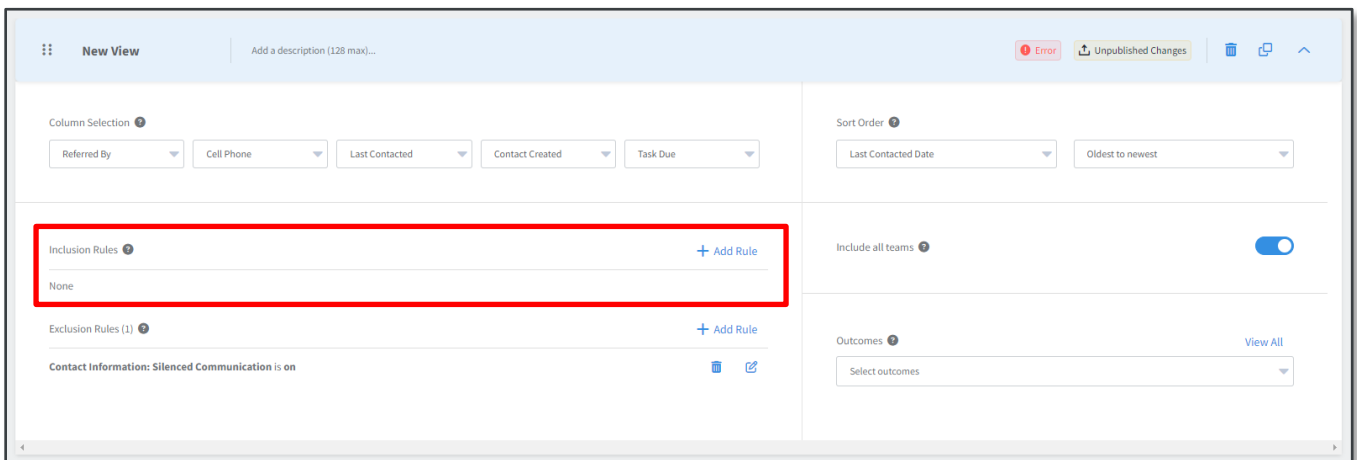
The drop-down menus that determine which columns to show to end users are located at the top of the left column inside the view's expanded box. The columns you choose here are shown in the same order on the standard view that end users see.



Inclusion Rules

Inclusion rules determine which of the user's contacts should be listed in the view. Any contact that satisfies *all* of the inclusion rules is listed in the view (unless they are removed by an exclusion rule).

Inclusion rules are located in the middle of the left column inside the view's expanded box.



Adding a Rule

Rules are defined by specifying a standard field in a contact's record and a value (or range of values) for that field. For each contact record, the value in that field is compared to the rule, and the contact is included in the view if their value matches the rule. To add a new rule:

1. Click the **+Add Rule** button.
2. A slide-out panel appears on the right side of the page. In this panel, click the name of the field your rule should be based on.



- a. If you know the name of the field, type any part of the name in the Search box at the top of the panel. The list is filtered to show only the field names matching the text you enter. (The Search box does not return results based on category headings, only names of individual fields.)
3. Depending on the data type of the field you selected, enter or select the values or range of values that the rule should use when comparing with each contact record.
 - a. Date range – Select either **In the next**, **In the last**, or **In the range**. Then enter a number, and select either **Days**, **Weeks**, **Months**, or **Years**. (The resulting rule reads something like “In the last 6 months”.) You can enter the number by typing directly or by clicking the up/down buttons. Contact records whose date in this field falls in the specified range are included in the view.
 - b. Numeric value – Select either **Greater than or equal to (\geq)**, **Less than or equal to (\leq)**, or **In the range**. Then enter a value or values. You can enter the number by typing directly or by clicking the up/down buttons. Contact records whose value in this field falls in the specified range are included in the view.
 - c. Drop-down list – Select 1 or more options from the list. You can type in the box to filter the available options. Contact records whose value in this field matches any of the selected options are included in the view. (If you select more than 1 option, the record only has to match 1 of the selections.) Fields with this type typically draw from a list of options defined elsewhere in the platform, such as Loan Purpose.
 - d. Text entry – Enter any text. Contact records whose value in this field at least partially matches the text are included in the view. The comparison is not case sensitive. For example, if you enter in the City field, the rule would include contacts in St. Paul, St. Louis, and Boston.
 - e. Radio buttons – Select 1 of the available options. Contact records whose value in this field matches the selection are included in the view.
 - f. Contact Survey Response – Select a survey question, select a Boolean comparison, and enter text to compare with (you will not see a list of possible options). Contact records whose response to the question matches the text are included in the view.
4. Click the **Save and Close** button.

The new rule is added to the Inclusion Rules section. The rule lists the field you selected and the comparison values you entered. At the right end of the row are Delete Rule and Edit Rule buttons.

You can add as many inclusion rules as you want, but only contacts matching *all* of the inclusion rules are listed in the view.

Editing a Rule

To edit an existing rule:

1. Click the **Edit Rule** button (pencil icon) for any inclusion rule in the view.
2. A slide-out panel appears on the right side of the page. This panel includes a tile for each inclusion rule defined in the current view. Edit the parameters the same way you would when creating a new rule. You can edit multiple rules before saving.
3. Click the **Save and Close** button.

Deleting a Rule

To delete an existing rule:



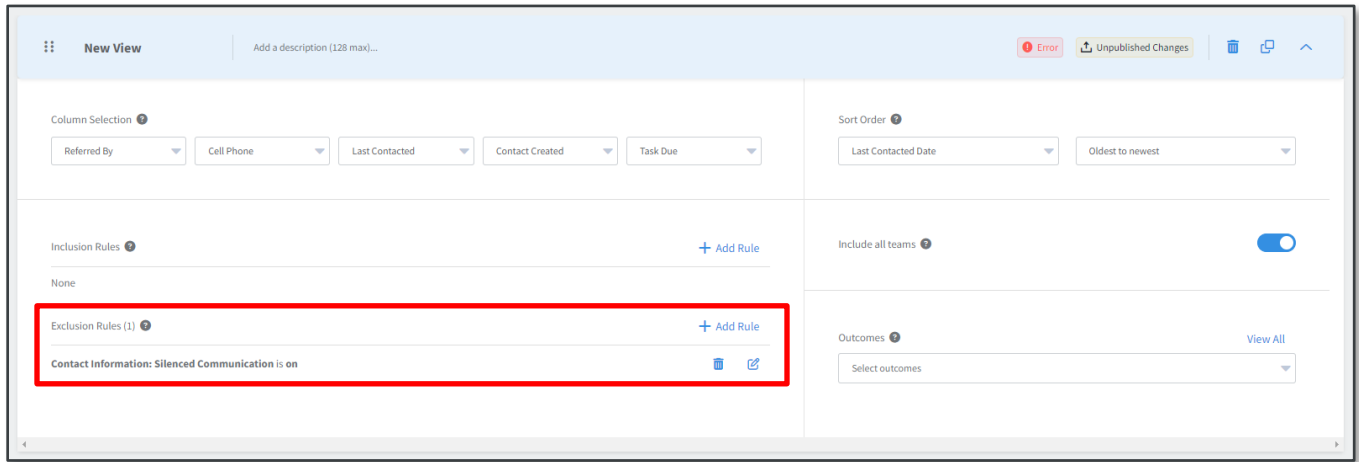
1. Click the **Delete Rule** button (trash can icon) for the rule you want to delete.
2. In the confirmation box, click the **OK** button.

The rule is removed from the Inclusion Rules section.

Exclusion Rules

Exclusion rules determine which of the user's contacts should *not* be listed in the view. Any contact that satisfies *any* of the exclusion rules is not listed in the view (even if they would be included by the inclusion rules).

Exclusion rules are located at the bottom of the left column inside the view's expanded box.



Add, edit, and delete rules the same way you would with inclusion rules. The available fields and options are all the same.

Note

If the field checked by an exclusion rule is blank for a particular contact record, that rule will not exclude that record (though it could still be excluded by a different rule).

Similarly, if an exclusion rule is checking any loan-related field, a contact will not be excluded if there is no loan tied to that record.

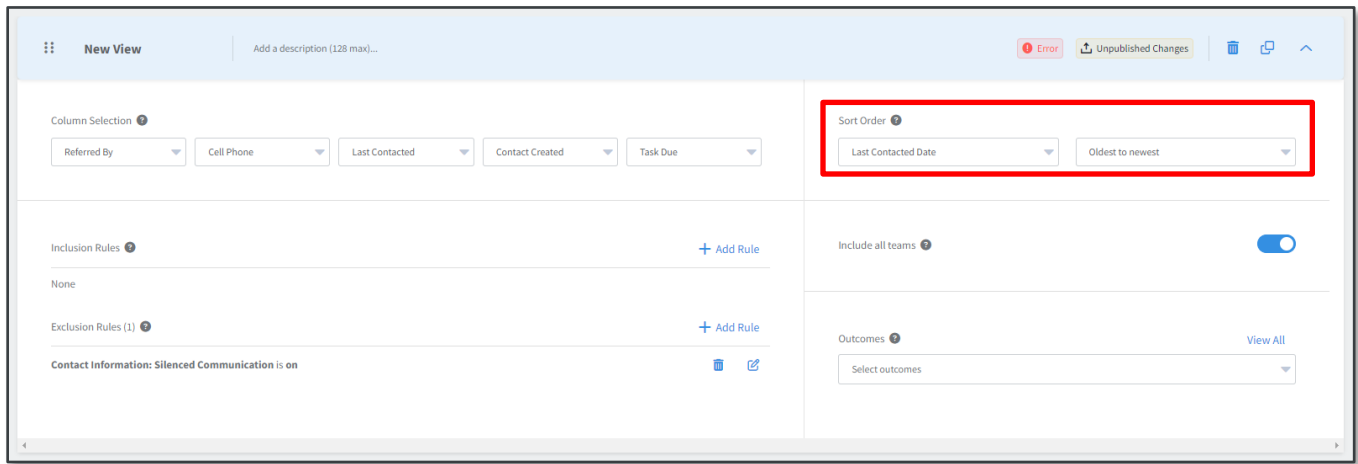
Tip

The exclusion rule “Silenced communication is on” is included with each new view by default. Contacts who have been marked silenced are excluded by this rule. This helps prevent your users from contacting anyone who has specifically asked not to be contacted.

Deleted and archived contacts are never shown in any view, regardless of any rules.

Sort Order

The sort order determines the priority of listed contacts within the view. There are 2 drop-down menus that determine the sorting at the top of the right column inside the view's expanded box.



1. In the first drop-down menu, select the field that should determine how the contacts are sorted, such as **Last Contacted Date**. The options are limited and not configurable.

Tip

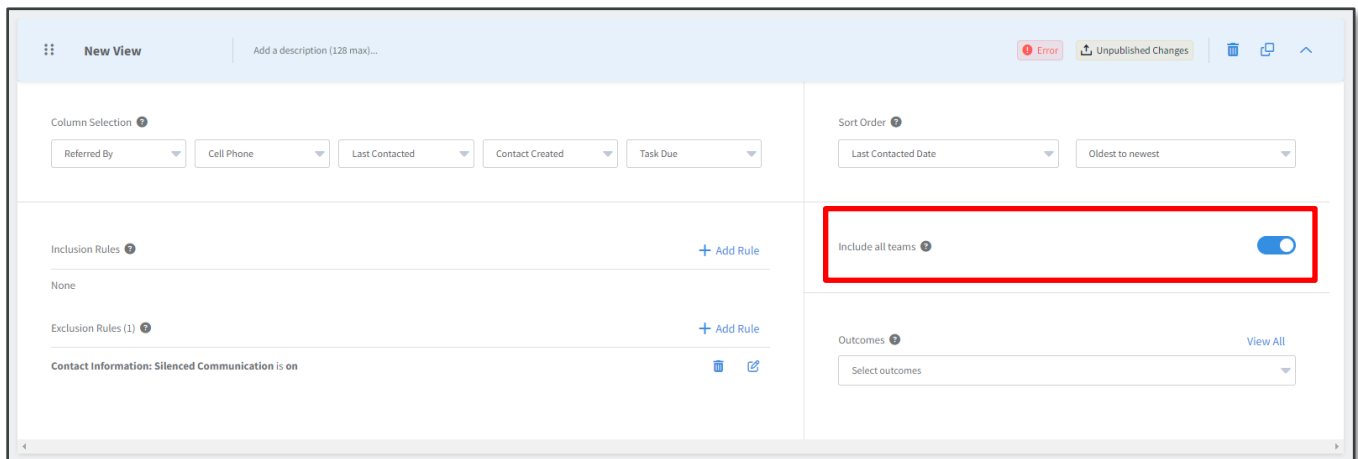
Consider selecting an option here that corresponds to a column you selected for the view earlier. The Sort Order rule is shown to end users, but this should help clarify to the end user how contacts are ordered in the view.

2. In the second drop-down menu, select the ordering to be applied to the field you just selected, such as **Oldest to newest**.

Teams

By default, a published view is available to every user in your organization. You can, however, make it available to only users on selected teams.

The teams selection options are located in the middle of the right column inside the view's expanded box.



In the example above, the **Include all teams** switch is toggled on. If the view is published with the switch in this position, it is available to every user in your organization. To restrict the view to only certain teams:

1. Click the switch to toggle it off; an additional drop-down list appears below it.



2. Select one or more of your organization’s teams from the drop-down menu. You can type in the box to filter the available options. You can remove a selected team by clicking the **X** on its label or by deselecting it in the drop-down menu.

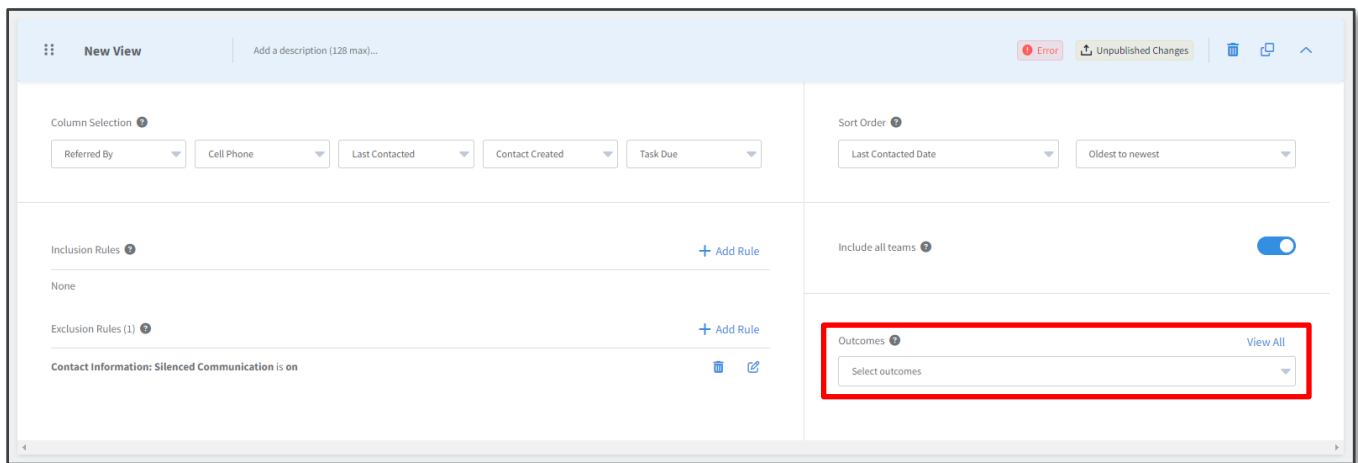
Once published, the view is available only to users who belong to one or more of the selected teams.

Outcomes

Outcomes are used to record how an interaction with a contact went. Users of the view have the opportunity to select among the options you add here when they reach out to each contact in the view. That selection can be used to determine inclusion or exclusion rules in this and other views.

End users creating custom views cannot create or edit their own outcomes. However, they can add any outcomes created by an administrator for the organization, even if they are not available to select in any standard view.

Outcomes are located at the bottom of the right column inside the view’s expanded box.



Creating an Outcome

1. Click the **View All** button at the right end of the Outcomes section.
2. A slide-out panel appears on the right side of the page. It lists all the outcomes already defined for your organization.
3. At the top of this panel, click the **+Create Outcome** button.
4. Enter a name for the outcome in the **Enter a name...** field.
5. (optional) Check the **Update ‘Contacted On’ date** box. If this is selected, when a user selects this outcome for a contact, that contact will be treated as having been contacted at that time—which could affect their inclusion or sort position in a view.
6. Click the **Create** button.
7. The new outcome is listed in the panel. Repeat steps 3–6 until you have defined all desired outcomes.
8. Click the **X** button in the upper-right corner to close the slide-out panel.

Adding an Outcome to a View

1. Click in the **Select outcomes** box in the Outcomes section.



2. Select one or more of the outcomes you have created from the drop-down menu. You can type in the box to filter the available options.

Tip

Consider including, at a minimum, at least 3 outcomes for each view: 1 positive outcome, 1 negative outcome, and 1 neutral outcome. This should account for a variety of possible results when one of your users attempts to contact someone from a focused view.

You can remove an outcome from a view by clicking the **X** on the label for the outcome you want to remove or by deselecting it from the drop-down menu.

Editing an Outcome

1. Click the **View All** button at the right end of the Outcomes section.
2. In the slide-out panel, click **Edit** for the outcome you want to change.
3. Modify the name and/or checkbox setting.
4. Click the **Save** button.
5. Click the **X** button in the upper-right corner to close the slide-out panel.

Warning

Once defined, an outcome is available for all views, including end users' custom views. Modifying the definition in one view changes it for all views that use that outcome.

Deleting an Outcome

1. Click the **View All** button at the right end of the Outcomes section.
2. In the slide-out panel, click **Edit** for the outcome you want to change.
3. Click the **Delete** button.
4. In the confirmation box, click the **Ok** button.
5. Click the **X** button in the upper-right corner to close the slide-out panel.

Warning

Deleting an outcome means it is no longer available for any view.

Publishing

Until a view is published, no users can see it on the Standard tab of their Focused View page or use it as the basis for a custom view on the Custom tab. Once the view is published, all users in your organization can see the view unless you restricted the view to 1 or more teams.

To publish all the views, click the **Publish View** button in the upper-right corner of the page, then click the **Ok** button in the confirmation box. You cannot publish if any views have the Error label.

Note

Remember, a view must have a title, at least one inclusion rule, and at least one outcome defined before it can be published.



Tip

You cannot publish changes to individual views. However, you can “hide” a view by publishing it with the **Include all teams** switch turned off and no teams selected.

If there are no views with unpublished changes, the Publish View button is deactivated. If there are any views with the Unpublished Changes label, the label also appears next to the page title and the Publish View button is activated.

Note

Simply reordering views does not activate the Publish View button. If you want to publish existing views in a new order, make a token change to a view and reverse it, such as adding and removing a rule from a view.

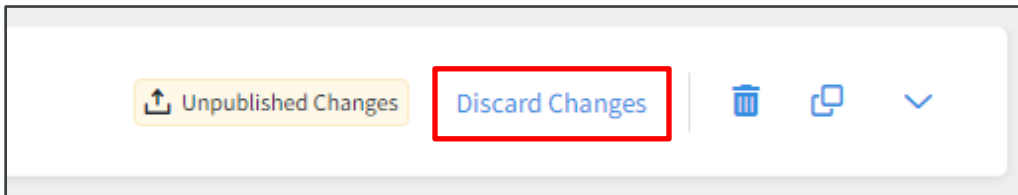
Managing Views

Editing a View

If you need to change how a published view is defined, click the **View Details** button and modify any options the same way you would when creating a new view. You must click the **Publish View** button for your changes to take effect in the end user view.



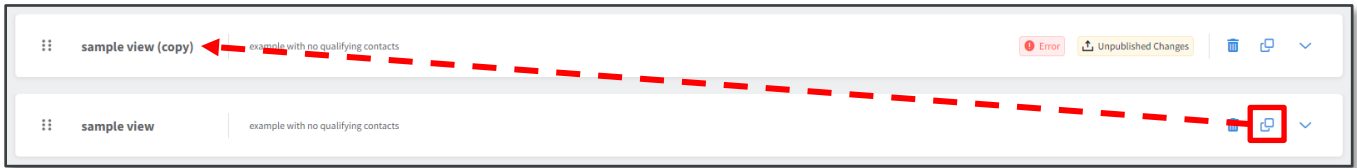
When you have made changes to a view that have not been published, the view shows an Unpublished Changes label and a Discard Changes button. You can revert a view with unpublished changes to the previous published version by clicking the **Discard Changes** button. You can discard changes on each individual view independently.



If you navigate away from the page while there are unpublished changes, those changes are retained but not published. When you return to the page, you will still have to decide whether to publish or discard the changes.

Copying a View

Once you have created a view, you can duplicate it and use the new copy as a template to build a similar view without having to start from scratch. To copy a view, click the **Copy View** button near the right end of the box. The new view is added immediately above the view you copied and given the same title with **(copy)** added. All other aspects of the view are the same as the copied view. Edit the view as desired, especially updating the title, and click the **Publish View** button for your changes to take effect.



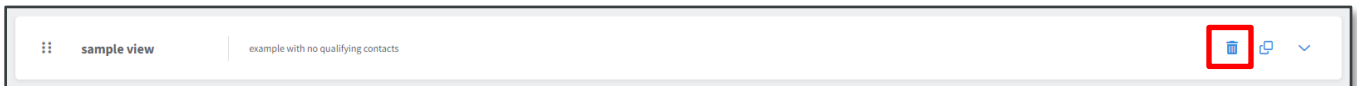
Prioritizing Views

Remember that a given contact only appears in the highest priority view that they qualify for on a user's Focused View page, even if that contact qualifies for multiple views. The views are prioritized according to the order they are arranged in on the Focused View Builder page, with the view at the top considered highest priority. To change the position of a view in the list, click and hold the **Move View** button at the left end of the view and drag the view to the new desired location.



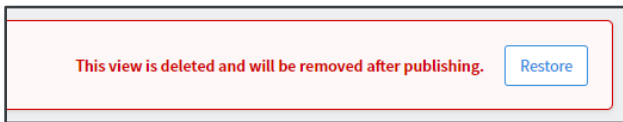
Deleting a View

To remove a published view from the list of views, click the **Delete View** button near the right end of the box. The next step depends on whether or not the view has been published yet.



Published View

For a published view, the view is highlighted red and shows a message indicating that the view will be removed once you click the Publish View button. The only available action is a Restore button.



If you click the **Publish View** button at the top of the page and click the **Ok** button in the confirmation box, the view is permanently removed from the list and can no longer be restored.

However, if you click the **Restore** button for this view, your initial choice to delete the view is reverted. Even if no other changes were made before the delete action, the view is treated as edited, requiring you to publish or discard the changes.

Unpublished View

For an unpublished view, a confirmation box appears with a message asking you whether to proceed. Click the **Ok** button to delete the view; the view is permanently removed from the list.