Focused View for End Users

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Focused View

Focused view is a feature in the Total Expert platform that saves pre-defined filtering and prioritization rules to identify which contacts in your list are the most important for you to connect with next. By having views with these rules set up, you can avoid manual filtering and searching to create a call list; each time you refresh the Focused View page, the rules are reevaulated, highlighting your best opportunity to do business right away.

Focused view makes use of your contact data already stored in Total Expert; in addition to being the basis of the rules deciding which contacts to highlight, important details about the contact, any existing loans, your interaction history, and more are shown. This quickly provides you with what you need to know—not only whom to call, email, or text—but also crucial context about them, so each message is appropriately personalized. Plus, you can log results of your interactions and set follow-up tasks all from the same page. All this allows you to better stay in front of your highest-value contacts to attract and retain their business.

Your organization creates a standard set of prioritized views based on the things that are important to your particular business. A standard view uses the same rules for anyone in your organization with access to the view (showing only the contacts of whichever user is viewing the page). However, you can also create your own custom views, where you can set your preferred rules for which contacts should be listed and how they should be prioritized. Otherwise, any custom views you create work the same way, letting you review details and record the result of each interaction.

Standard Tab

Navigate to **Leads & Contacts → Focused View**. If you have not yet created any custom views, the Standard tab is selected at the top of the page. If the Custom tab is currently selected, click the **Standard** tab.

On the Standard tab, you see views created by administrators in your organization, including views created for all users and those assigned to your teams. These views are fully defined and prioritized by administrators, and their rules are the same for any user with access (though each user would see only their own contacts in the views). As a result, you cannot modify these standard views; if you feel a change in the setup of standard views is warranted, contact your system administrator (or consider creating a custom view for yourself; see Custom Tab below).

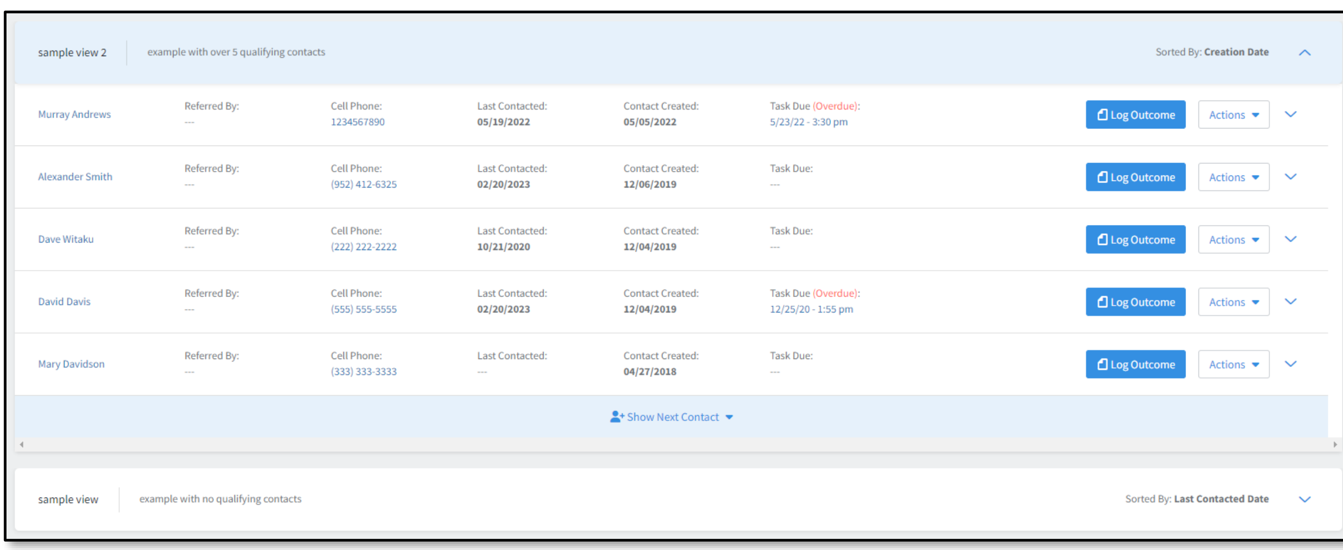
The header row of each view shows the title, description, and Sorted By rule defined for the view. This information is included to help you understand the intent of each view and why they are prioritized as they are.

The views are listed in the priority order defined by administrators, with the highest priority view at the top. A contact who meets the rules for more than one view will *only* be listed in the highest priority view they qualify for. If a contact's information changes and no longer qualifies for that view, they are removed and instead shown in the next-highest priority view they qualify for.

When you load the Focused View page, the highest priority view is expanded by default; other views are collapsed. You can expand or collapse any view by clicking the **View Details** arrow button at the right end of that view's header row.

Contacts in a View

Within a view, contacts who qualify for the view are listed in the sort order defined as part of the view's setup. If the view includes more than 5 contacts, only the first 5 are shown, but you can expand the view further by clicking the link in the view's footer row. If no contacts qualify for a view, the message "No contacts currently qualify for this view." displays when the view is expanded.



Right away, each contact shows some basic information in columns selected by the administrator. Some common useful columns include:

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- Cell Phone – This makes it possible for you to load the Focused View page and immediately see how to call the highest priority contacts identified by the standard views.
- Task Due – This shows you whether there is a pending task associated with the contact and, if so, when it is due. If there are multiple tasks, the one with the closest approaching deadline (or most overdue deadline) is shown. You can click the deadline to open a slide-out panel with the details of all tasks for that contact.

Note
If the contact is included in the view because of a pending task, the one whose deadline is shown may not be the task that qualifies the contact for the view.

At the right end of each row, you will see 3 items:

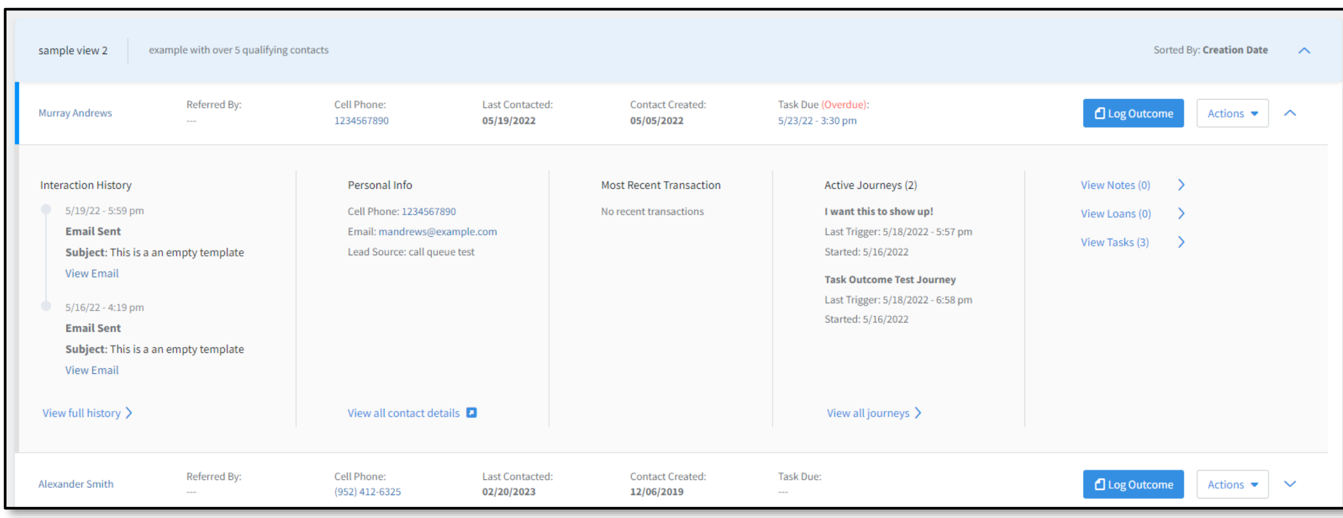
- A **Log Outcome** button. Click this button to open a slide-out panel to select an outcome from those defined for this view.
  - Some outcomes might be set up to update the contact's Last Contacted Date; if you select one of these outcomes, a note appears below your selection before you save the outcome to alert you of this change. That way, you can be prepared if this removes the contact from the view on the next refresh.
  - You can also optionally add a note or a task to the contact record to save information or schedule a follow-up reminder along with the outcome to more fully document the interaction you had with the contact.
- An **Actions** menu. Click this menu to see a variety of contact-related actions you can take, such as sending an SMS or email. These are some of the same actions available through the full contact list; the exact options you see depend on your user role's permissions. These actions make it possible for you to work with and record results of your interaction with the contact right from this screen.
- An arrow button. Click this button to expand the row and see more details for the contact. See Expanded Contact Details below.

Expanded Contact Details

When you expand the row for a contact within a view, an additional panel slides out below the original row and above the next listed contact. This panel includes further information to help you understand more about activity related to the contact. Each column has a different type of information:

- **Interaction History** – This is a list of various actions taken in relation to the contact. This includes automatically and manually sent emails and the contact's interactions with them (opens, clicks, and so on), any notes attached to the record (including private notes), outcomes defined in Focused View, and any tasks that were defined while recording an outcome (other tasks are *not* listed here). The full history may not fit in this panel; click the **View full history >** button to open a slide-out panel with a full listing on the right side of the page.
- **Personal Info** – This section displays the contact's full contact information and some key dates, such as the contact's birthday. Click the **View all contact details** button to open the contact's full details page in a new browser tab.
- **Most Recent Transaction** – This summarizes the key data from the contact's *most recent* loan. Click the loan number to open the loan's full details page in a new browser tab.

- **Active Journeys (#)** – This section summarizes each journey the contact is currently on in the Total Expert platform. The number in the heading of this section is the number of journeys. Click the **View all journeys >** button to open a slide-out panel on the right side of the page. This panel lists all active journeys, followed by all ended journeys the contact has ever been on (this section is collapsed by default). You can expand the section for each journey to view more complete details. For active journeys, if the journey settings allow it, you can trigger the next step or stop the journey for that contact, just as you would from the contact's details page.
    - You can also trigger a new journey for the contact by clicking the **+Add Journey** button at the top of the panel.
- The last section includes buttons to view notes, loans, and tasks associated with the contact. A number is shown in parentheses for each to indicate how many are associated with the contact. Each button opens an associated slide-out panel.
    - **View Notes (#)** – The slide-out panel lists all the notes added to the contact record, including those associated with an outcome. The notes are listed in order of creation, with the newest note at the top. Each includes a menu where you can delete the note. You can also create a new note by clicking the **+Add Notes** button at the top of the panel.
    - **View Loans (#)** – The slide-out panel lists all the loans associated with the contact. Each includes a link to the loan's full details page, which opens in a new tab.
    - **View Tasks (#)** – The slide-out panel lists all the incomplete tasks associated with the contact, including those associated with an outcome. The tasks are listed in order of due date, with the next due (or most overdue) task at the top. Each includes a menu where you can mark the task complete, edit the task, or delete the task. You can also create a new task by clicking the **+Add Task** button at the top of the panel. Below the list of incomplete tasks, you can expand a list of the completed tasks associated with the contact. When a task is marked complete, it is moved from the incomplete list to the completed list.



Custom Tab

Note

The Custom tab is controlled by permission. See your system administrator if you think you should have access and do not see this tab.

Navigate to **Leads & Contacts → Focused View**. If you have already created at least 1 custom view, the Custom tab is automatically selected when you load the page. If the Standard tab is currently selected, click the **Custom** tab at the top of the page.

Using custom views is only necessary if you want to see contacts based on different criteria or in a different priority order than what is given in the standard marketer views. Setting up custom views allows you to decide for yourself how your call list is determined.

The Custom tab is where you will both edit and view the results of your custom views. You will have to toggle back and forth between edit and view modes on the Custom tab.

On the Custom tab, you will see only the views you have set up yourself. If you have not created any yet, a tile shows "No Custom Views" with links to create a new view. There are 2 ways to create a custom view:

- Using a marketer view from the Standard tab as a template to build from
- Building a new view from scratch

Views created by either method are listed together on your Custom tab. No other user sees anything you set up on their Custom tab, even if it is based on a marketer view.

Tip
You may want to start with a standard marketer view the first time to familiarize yourself with how a view's setup results in the marketer view you are already familiar with.

Note
If you create a view based on a standard marketer view, changes made by the marketer to the original view are not carried through to your custom view. Likewise, changes you make to your custom view do not affect the original.

Views you create in the Custom tab have the same appearance and information as those on the Standard tab. The same details are shown for each contact listed.

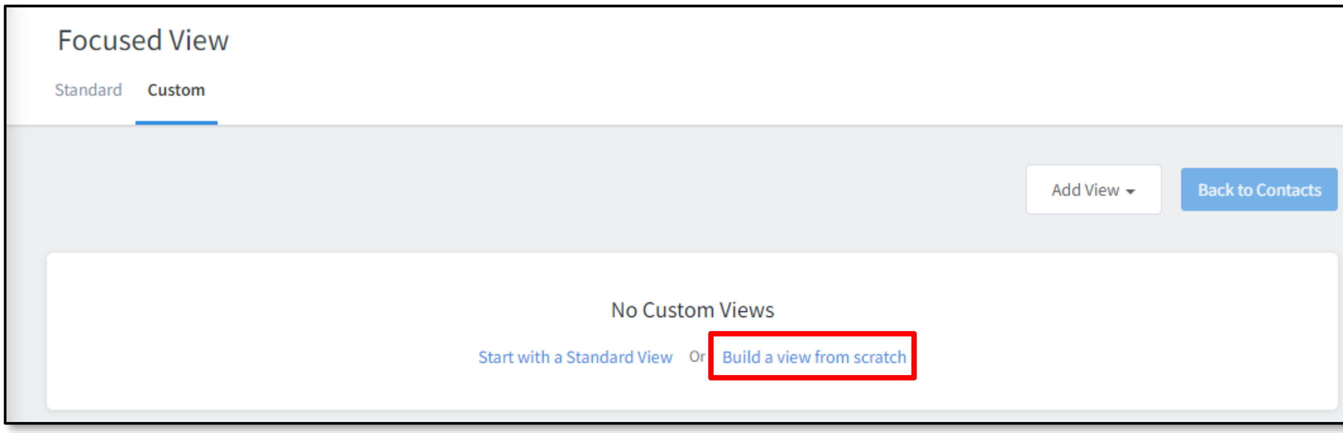
Creating a View

You can create a custom view either completely from scratch or by starting from an existing view from the Standard tab.

From Scratch

To create a view from scratch, select **Add View → Add Blank View**.

Alternatively, if you have not created any views previously, click **Build a view from scratch** in the box in the middle of the page.



Regardless of which method you use, the remaining setup proceeds the same way.

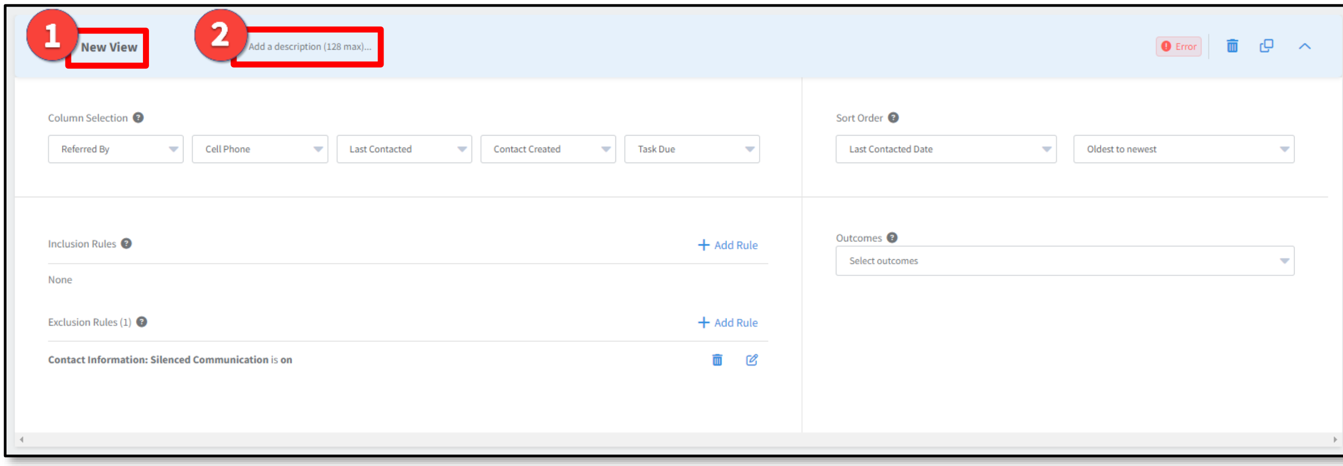
Note

A new view from scratch 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 is considered valid. The default title is sufficient, but it should be changed to something meaningful.

Title and Description

Even though you are the only user who will see your custom views, it is still important to provide descriptive text to help remember what 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.

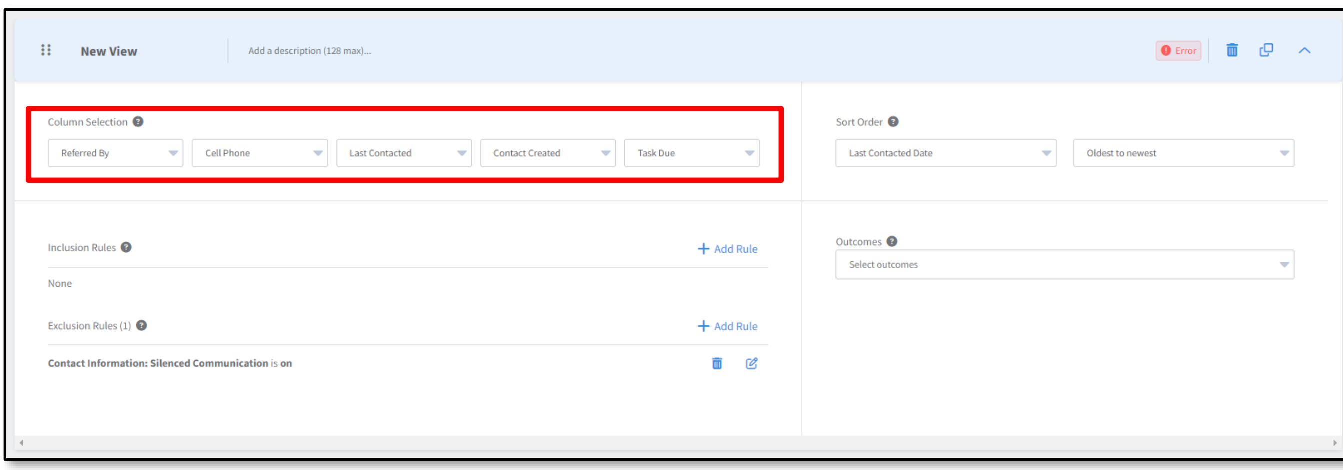


Column Selection

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

You can define the 5 primary columns of data shown in the view. You can select different columns for each view, depending on the purpose and needs of each.

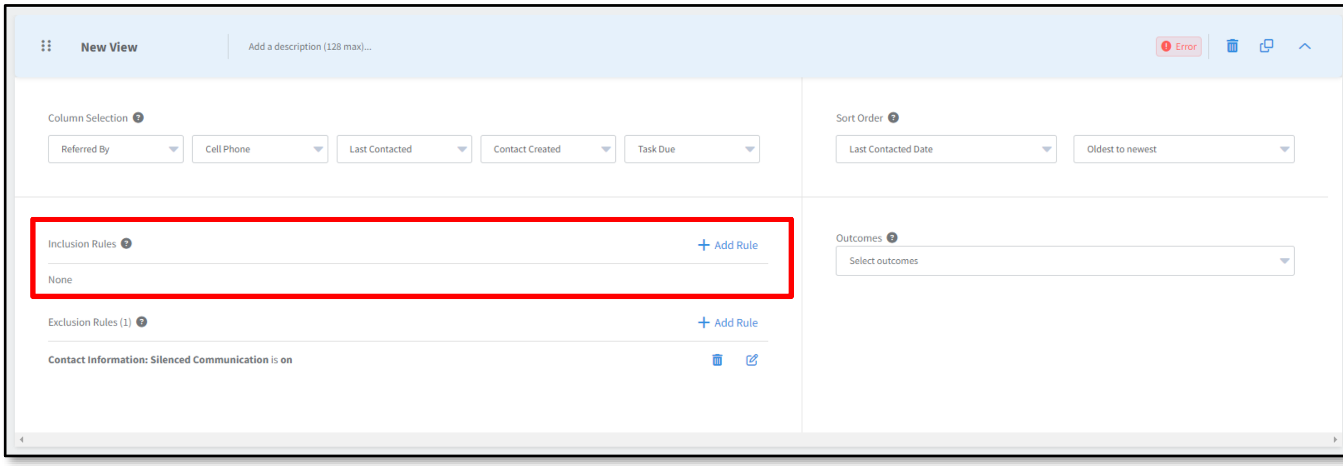
The drop-down menus that determine which columns to show are located at the top of the left column inside the view's expanded box. The columns you choose here are shown in the same order on your custom view.



Inclusion Rules

Inclusion rules determine which of your 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.



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.)

Note
Custom fields are not available when building rules in focused view.

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 (≥)**, **Less than or equal to (≤)**, 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 st 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.

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.

To delete an existing rule:

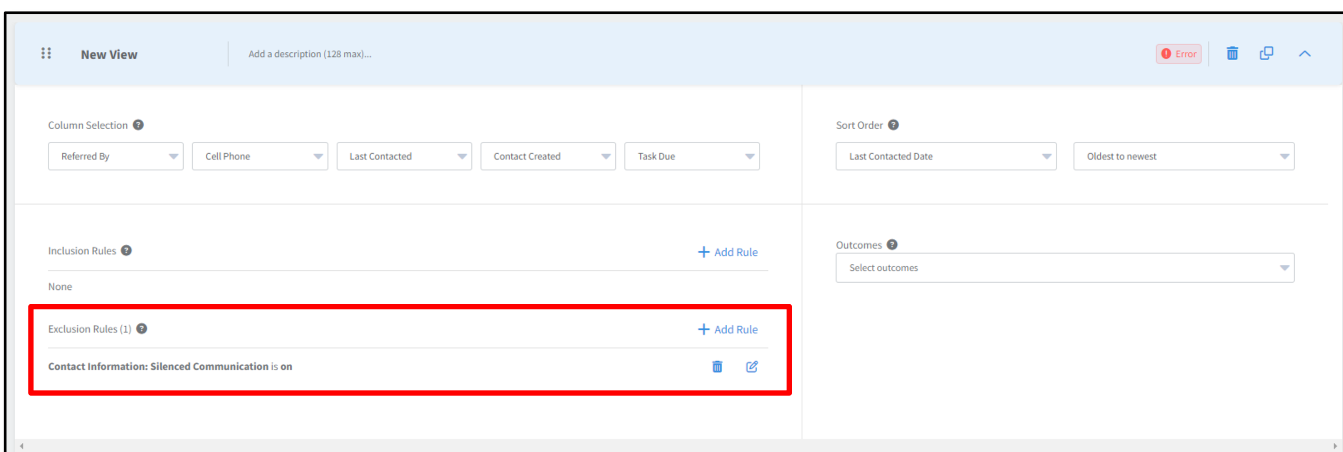
1. Click the **Delete Rule** button (trash can icon) for the rule you want to delete.
2. In the confirmation box, click the **OK** button.

The rule is removed from the Inclusion Rules section.

Exclusion Rules

Exclusion rules determine which of your 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 an inclusion rule).

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.

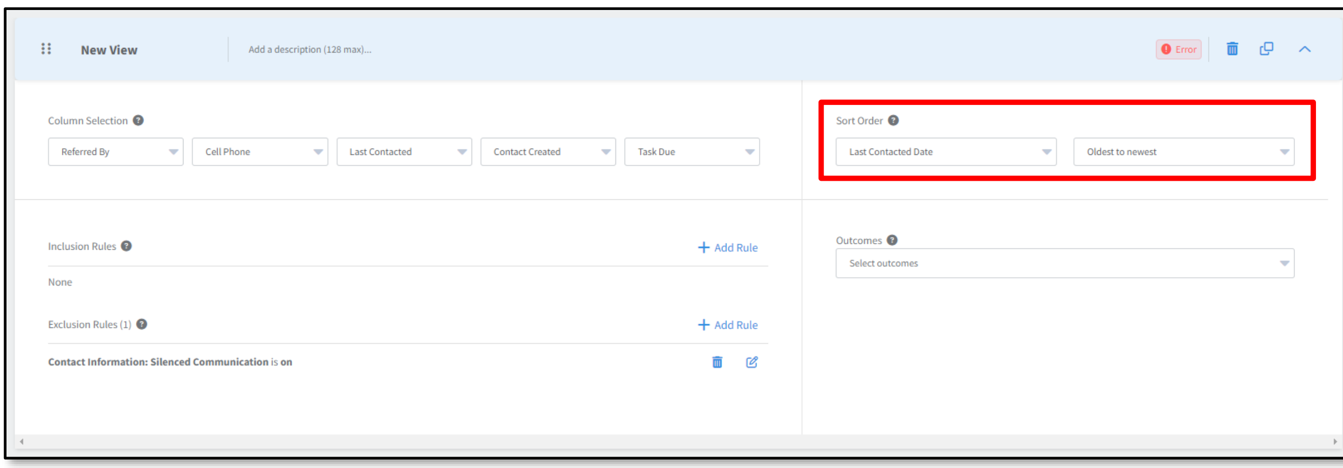
Tip

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 you 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 in the custom view, but this should help clarify for you how contacts are ordered in the view.

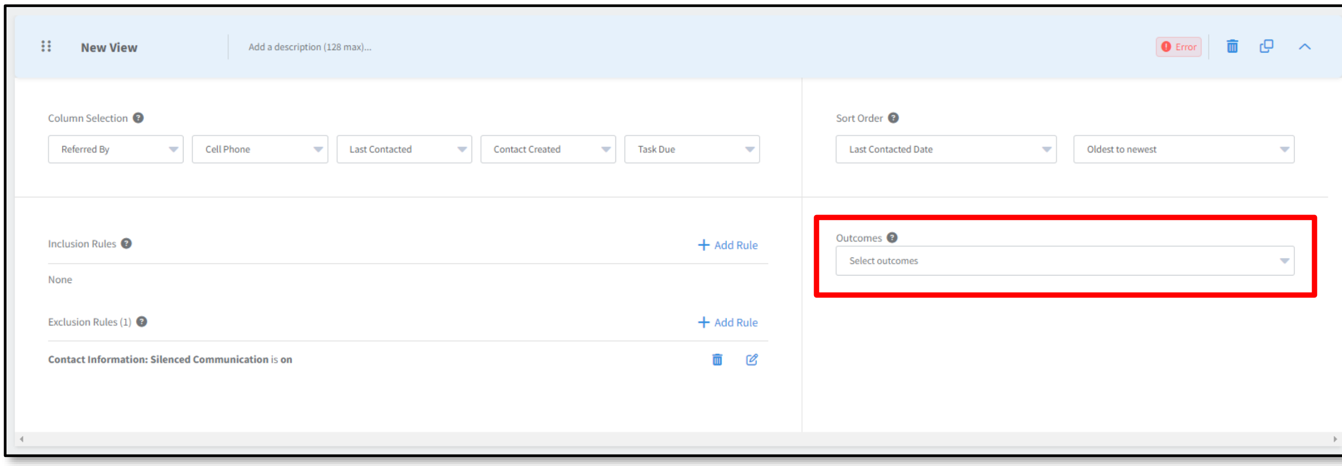
2. In the second drop-down menu, select the ordering to be applied to the field you just selected, such as **Oldest to newest**.

Outcomes

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

Only administrators can create and edit outcomes. However, you 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 in the middle of the right column inside the view's expanded box.



To add an outcome to a view:

1. Click in the **Select outcomes** box in the Outcomes section.
2. Select one or more outcomes 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 you attempt to contact someone from this 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.

Based on a Marketer View

To create a view starting from a marketer view, select **Add View → Copy Standard View**.

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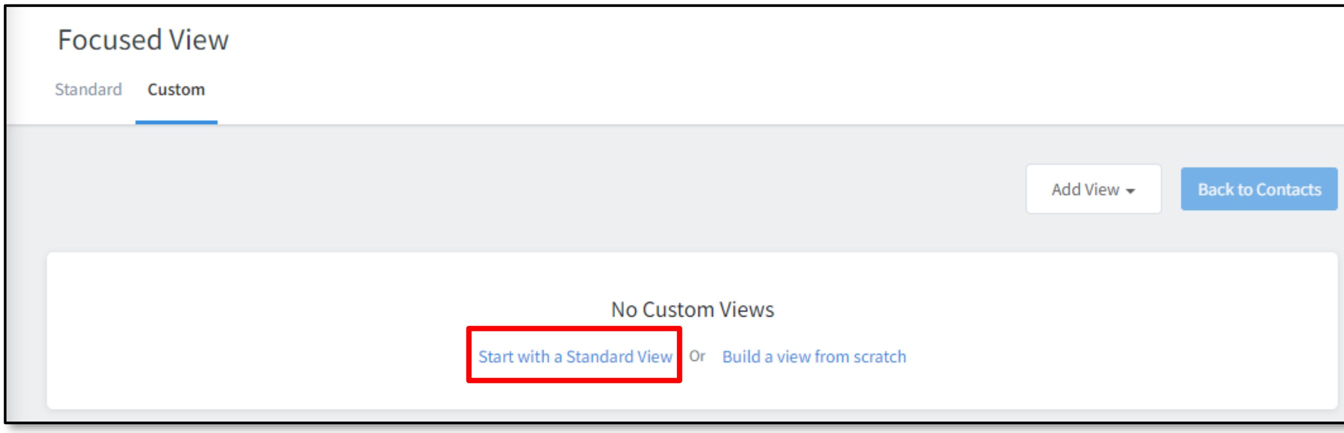
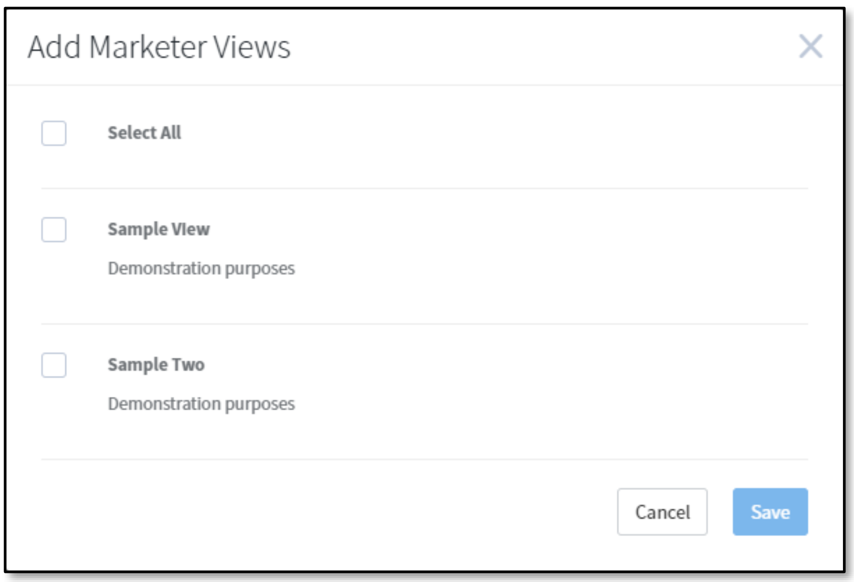
Alternatively, if you have not created any views previously, click **Start with a Standard view** in the box in the middle of the page.



Either way, the Add Marketer Views box appears with a list of all the views available on the Standard tab (in the same order). Select the checkboxes for 1 or more of these views—or the **Select All** box to check all the boxes at once—then click the **Save** button.

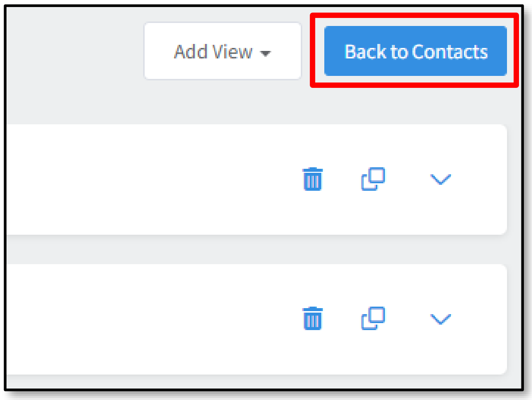


The marketer views are added to your custom list of views in the order that you selected their checkboxes, with the first one you checked added at the top. If you chose Select All, the views are added in the same order in which they appear on the Standard tab.

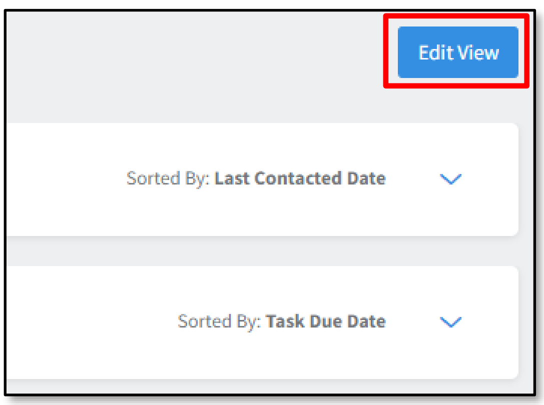
Expand each new view by clicking the **View Details** arrow button at the right end of the view. The methods for selecting columns, adding or removing inclusion rules and exclusion rules, setting the sort order, and selecting available outcomes for the view are the same as when creating a view from scratch.

Switching Between Edit and View Modes

At any time while editing your custom views, click the **Back to Contacts** button to switch to view mode. Any views with the Error label are omitted in view mode but are saved so that you can continue working on them when you return to edit mode.



At any time while in view mode, click the **Edit View** button to switch back to edit mode.



If you navigate away from the Focused View page then return, you will always see the Custom tab in view mode—even if you were in edit mode when you left.

Making Changes

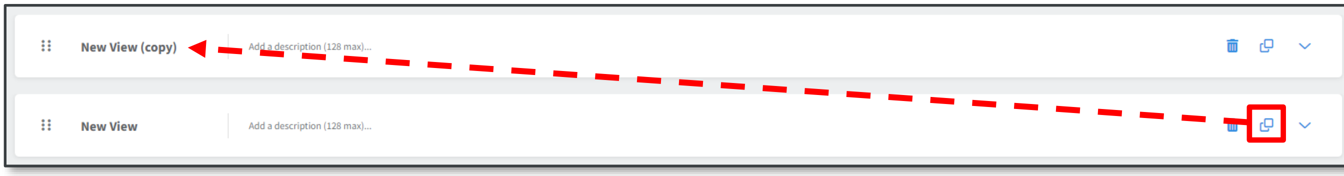
You are always able to update any part of the setup of your Custom tab. The following sections assume you are already viewing the Custom tab in edit mode.

Editing a View

You can change any part of the setup of your custom views. Simply expand the view's row and make selections in the view editor the same way you would when setting up a new view. The changes take effect as soon as you switch back to view mode. Remember that a view without an inclusion rule or without an outcome is considered invalid and is omitted from view mode.

Copying a View

If you want to make a view that is very similar to one of your existing custom views, you can copy the existing view and adjust the new copy as desired. In edit mode, click the **Copy View** button near the right end of the existing view. 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.



Prioritizing Views

While in edit mode, you can rearrange views to change their priority order in the list. The view at the top is given the highest priority. A contact only appears in the highest priority view for which they qualify, so you see them for the highest priority reason.

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

While in edit mode, you can remove views from the list. To remove a view, click the **Delete View** button near the right end of the view, then click the **Ok** button in the confirmation box. Once a view is deleted, it cannot be recovered.