



Update: New Contact Tab and Changes to the Location Tab

The old Location tab had address and contact information on one screen. The update will split contact information as a separate tab effective April 16<sup>th</sup>, 2019.

Old location tab

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES **LOCATION** REFERRALS

CLIENT LOCATION

Address Type Home

Name

Address (line 1)

Address (line 2)

City

State CO - Colorado

Zip Code

Email

Phone (#1)

Phone (#2)

Status

New Location tab

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES **LOCATION** REFERRALS

ADD CLIENT LOCATION

Address Type Home

Address (line 1)

Address (line 2)

City

State Alabama

Zip Code

Location Date

Active Location

Note

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If a location is no longer valid, you can edit the record, and toggle off the active location switch.

The map is no longer connected to Google street view, but it does have high resolution satellite imagery and can be zoomed in and out in a similar fashion to the old format.



## Contact information (phone numbers and email addresses)

You will no longer need to “fake” the address information if all you have is a phone number or an email. Instead, go to the new Contact tab and click “add contact”. The only required information on the add contact screen is the contact date.

**ADD CONTACT**


Contact Type Client ▼

Email

Phone (#1)

Phone (#2)

Active Contact


Contact Date  

Note 

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**SAVE CHANGES** **CANCEL**

Once you have added contact information, the Contact screen will allow you to add more contacts or edit existing ones. If contact information is no longer valid, click “edit” and toggle the Active Contact switch off, rather than deleting it. This will pull the contact off the list and put in the “inactive contacts” section.

**CLIENT CONTACTS** ADD CONTACT 

Contact Type	Name	Phone	Email	Date
Client	Abraham Rudder			(not set)
<a href="#">show inactive contacts</a>				