



Configurable Product Panel

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Introduction

The product panel is a section of a contact’s details page that displays any financial products associated with that contact. As an administrator, you have the power to choose which types of products—and which fields for each product—are displayed in the product panel. This allows you to surface the most important information for your users so they can see what they need most at a glance. This allows them to understand information about their contacts’ current products so they can support their needs efficiently.

Tip
Work with your users to determine which information is most important for them to see to understand their contacts.

Configuring the product panel is important during initial setup of your organization in Total Expert and anytime a new product or custom field that should be shown in the product panel is added to the database. Changes to the configuration are immediately reflected on the panel, allowing you to respond quickly to your users’ needs and expectations.

The Product Panel

When viewing the details page for a given contact, the product panel is shown and is divided into categories. Each category heading includes a number in parentheses; this number indicates how many products the contact has in that category. If the contact has no products in a category, the category heading is still shown (with (0) indicating it is empty). If all categories are empty for a contact, the product panel is still shown with all the category headings configured for the organization.

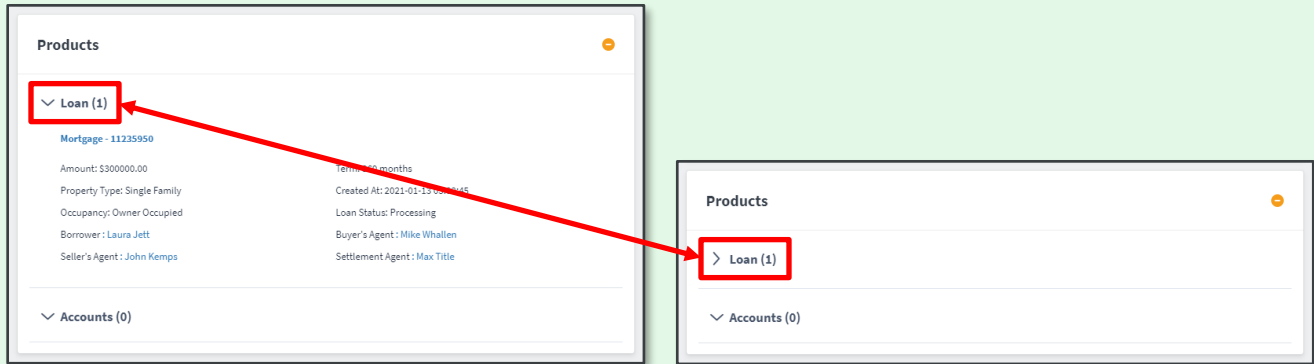
If the contact has a product in a category, the product type and identifying number are shown under the category heading along with the relevant details from that product. (The details are determined by the configuration; see



Editing the Fields Shown for a Product below.) If there are multiple products in a category, all products are shown in order of creation with the newest at the top.

Tip

Click the category name to collapse its section. Click the name again to expand it again.



Configuring the Product Panel

Note

The configuration settings you select will apply to all users in your organization.

For any of the following configuration options, navigate to the Product Settings page:

1. Navigate to **Organization Admin → Configuration Settings**.
2. In the Product Panel Settings tile, click the **Update** button.

On the Product Settings page, you can sort your preconfigured products into categories, create new categories, select which fields should be visible on the product panel (and in what order), and preview what each product’s setup would look like with some sample data. Sample data always uses the correct data type for the field shown.

The right side of the page lists details about the history of the product panel settings, including a log of each time the panel was updated. Prior to any customized setup for an organization, administrator users will see a recommended setup of categories, products, and fields on this page based on their organization’s products. An administrator must confirm the suggestion or adjust the setup before end users see the setup in the product panel.

Tip

At any time, you can expand or collapse a product type within a category by clicking the product name. Switch to another category to see its products by clicking its name in the list on the left side of the page.

Adding a Product to a Category

A product must exist in your organization’s list before it can be added to a category.

1. Click the **+Add Product** button.
2. In the Add a product box:
 - a. In the **Category** drop-down list, select the category you want to add to.



- b. In the **Category Products** drop-down list, select an uncategorized product to add to the category. (Products that are already included in a category are not listed.)
 - c. Click the **Next** button.
3. On the next screen, 2 lists are shown:
 - The list on the right is the list of fields that will be displayed on the product panel. The order in this list determines the order they will appear on the product panel. Recommended fields are included automatically.
 - The list on the left includes all other standard and custom fields applicable to the selected product in alphabetical order.
4. Select 1 or more field names in the list on the left and click the **Add** button to add them to the list on the right, adding them to the view.
5. Select 1 or more field names in the list on the right and click the **Remove** button to move them back to the list on the left, removing them from the view.

Tip

Be judicious with the number of fields you include in the view. Remember that this is meant to make only the most important data visible quickly—the remaining data for the product can still be read by accessing the product’s details page. TE recommends a maximum of 20 fields per product.

6. To reorder the list on the right, select a field and click the **Up** or **Down** buttons to move it one position at a time up or down the list. Click the **Top** or **Bottom** buttons to move it directly to the first or last position in the list. You can select and move more than 1 field at once.
7. Click the **Next** button.

Choose which fields are displayed for Mortgage

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Search for field Q</div> <ul style="list-style-type: none"> Address 2 Adverse Action Date Amort Type Amort Type Arm Desc Application Number Appraised Value Approval Date Estimated Audits Date Available Line Amount 	<p>Add</p> <div style="border: 1px solid #ccc; width: 20px; height: 20px; margin: 2px auto; background-color: #007bff; color: white; display: flex; align-items: center; justify-content: center;">▶</div> <p>Remove</p> <div style="border: 1px solid #ccc; width: 20px; height: 20px; margin: 2px auto; background-color: #007bff; color: white; display: flex; align-items: center; justify-content: center;">◀</div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Search for field Q</div> <ul style="list-style-type: none"> Amount * Address 1 * Property Type * Occupancy * Closed/Funded Date * Term * Created At * Loan Status * 	<p>Top</p> <div style="border: 1px solid #ccc; width: 20px; height: 20px; margin: 2px auto; background-color: #007bff; color: white; display: flex; align-items: center; justify-content: center;">⬆</div> <p>Up</p> <div style="border: 1px solid #ccc; width: 20px; height: 20px; margin: 2px auto; background-color: #007bff; color: white; display: flex; align-items: center; justify-content: center;">⬆</div> <p>Down</p> <div style="border: 1px solid #ccc; width: 20px; height: 20px; margin: 2px auto; background-color: #007bff; color: white; display: flex; align-items: center; justify-content: center;">⬇</div> <p>Bottom</p>
<div style="border: 1px solid #007bff; padding: 5px 10px; background-color: #007bff; color: white;">Next</div>			

8. The box shows a preview of your selections with sample data. Click the **Previous** button to go back and modify the setup or the **Save** button to confirm the changes.

The selected category is updated to include the selected product, including the specific fields you selected.



Editing the Fields Shown for a Product

You can change which fields are displayed for each product type in the product panel.

1. For the product you want to edit, select **Actions → Edit Fields**.
2. On the next screen, add, remove, and reorder fields the same way as described in steps 3–6 of Adding a Product to a Category above.
3. Click the **Next** button.
4. The box shows a preview of your selections with sample data. Click the **Previous** button to go back and modify the setup or the **Save** button to confirm the changes.

Changing the Category of a Product

If you find that the organization of your products should be changed in the product panel, you can move products to other categories.

1. For the product whose category you want to change, select **Actions → Change Category**.
2. In the Change category box:
 - a. In the **Category** drop-down list, select the category you want to move the product to. The current category of the selected product is listed by default.
 - b. In the **Category Products** drop-down list, the product you started with is pre-selected. You can select further products to move.
 - c. Click the **Save** button.

Warning

If you move the last product in a category, the category will be removed from the view.

Previewing a Product View

If you want to see what the product will look like with sample data in the current configuration, select **Actions → Preview** for that product. Click the **X** in the corner of the preview box to close it.

Removing a Product from the Product Panel

You can remove a product from the product panel by removing it from its current category. You can add it back to the view later by adding it to a category.

1. For the product you want to remove, select **Actions → Remove**.
2. Click the **Remove Product** button in the confirmation box.

The product is no longer included in any category.

Adding a New Category

You can add a new category to the list as long as there is at least one product that does not belong to a current category.

1. Click the **+Add Category** button below the list of current categories on the left side of the page.
2. In the Add a category box:



- a. In the **Category Name** field, enter the name of the new category.
 - b. In the **Category Products** drop-down list, select an uncategorized product to add to the category. (Products that are already included in a category are not listed.)
 - c. Click the **Next** button.
3. On the next screen, add, remove, and reorder fields the same way as described in steps 3–6 of Adding a Product to a Category above.
 4. Click the **Next** button.
 5. The box shows a preview of your selections with sample data. Click the **Previous** button to go back and modify the setup or the **Save** button to confirm the changes.

The new category is added to the list on the left. The new category includes the selected product, which in turn includes the specific fields you selected.