**NuSoft Last Contact**

Version 8

**User Guide**

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# **Introduction**

This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn the basics of using NuSoft Last Contact.

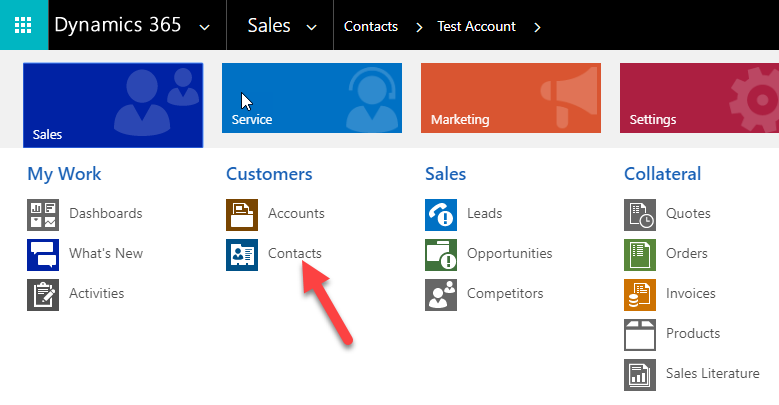
NuSoft Last Contact is a CRM utility that tracks your last interactions with Leads, Accounts, Contacts, and Opportunities.

Features:

* Automatically update Last Contact date fields on all records based on phone calls, appointments, and service activities
* Custom views on Account, Lead, and Opportunity:
  + My Neglected Records
  + All Neglected Records
* Neglected Customer Dashboard
  + Neglected Accounts, Leads, and Opportunities views
  + Neglect Accounts, Leads, and Opportunities charts by owner

# **Using NuSoft Last Contact**

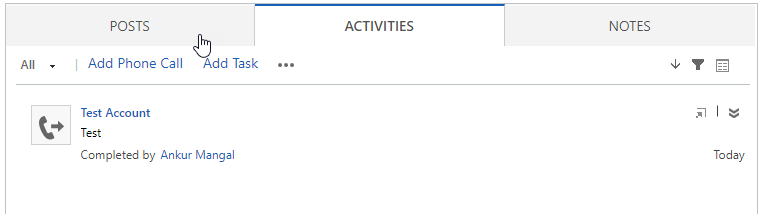
1. Navigate to **Sales -> Contact**.



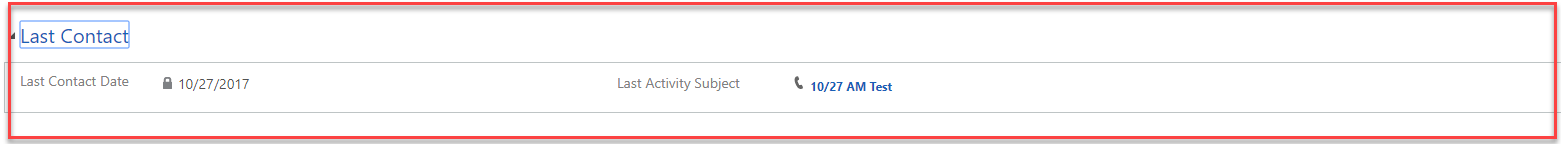
1. Create a contact and Save it or Open an existing contact.
2. On the Social Pane, click on Add Phone Call link. Go to **Activities** tab > Click On “**Add Phone Call**” link



1. Enter detail of the phone call and click ok
2. Wait for 30 seconds to 1 minute
3. Refresh the page



1. Expand Last Contact Tab (at the end of the page)
2. Last Contact Activity information - Last Contact Date (date field) and Last Activity Subject (webresource) - should be displayed on the form.

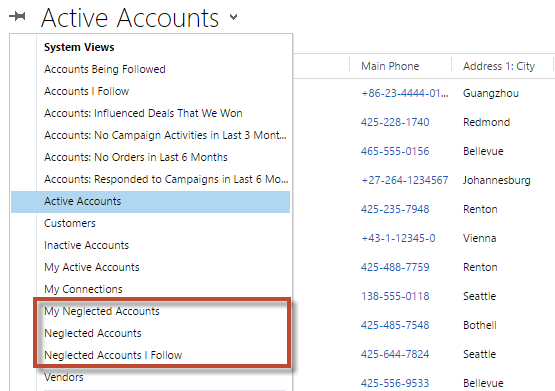


# **View Neglected Records**

NuSoft Last Contact allows for a quick look at which records need attention. This product comes with system views and a Last Contact Dashboard.

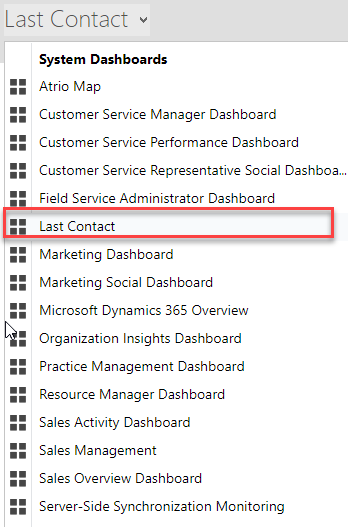
## Views

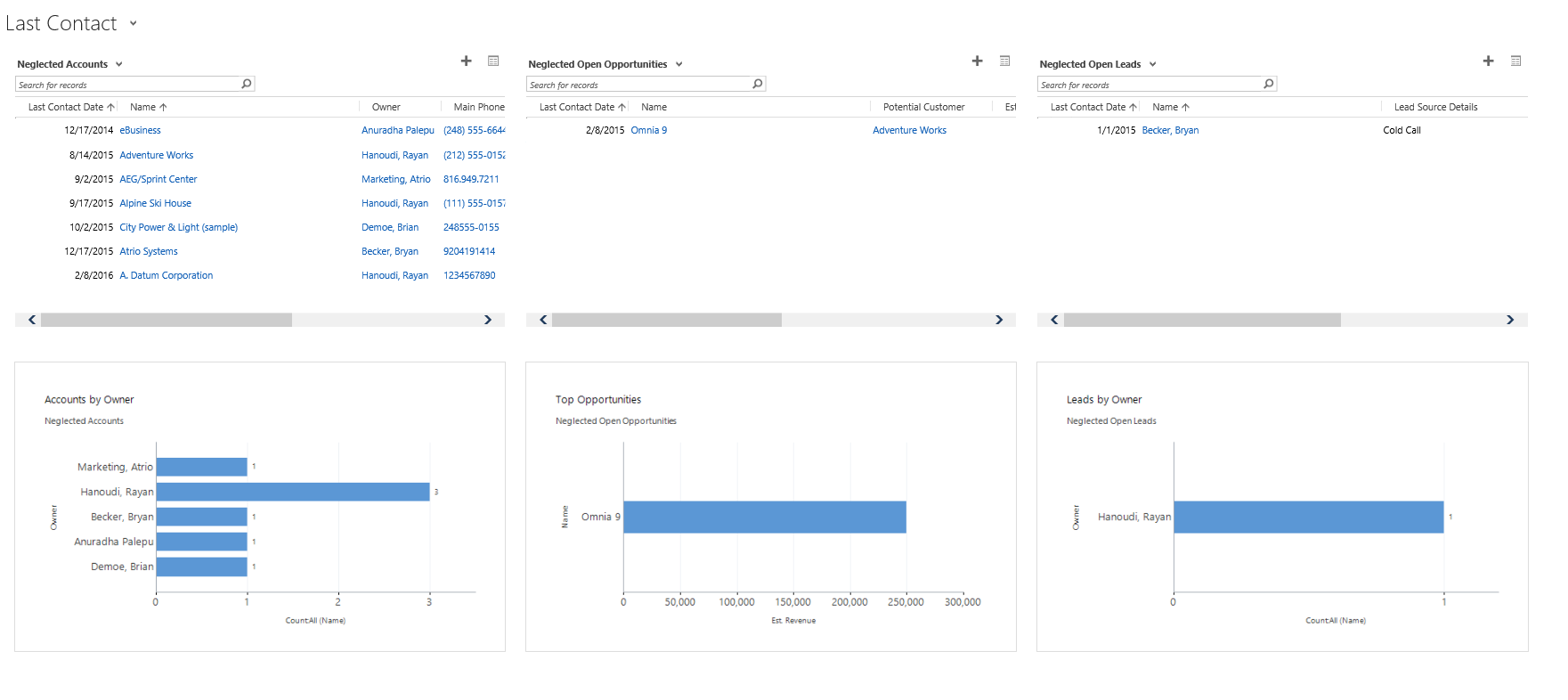
Go to any Lead, Account, or Opportunity list. Under the view list will be system views that list records that have not been contacted in the last 3 months in order of oldest Last Contact Date. **Note:** this range may be modified by your system administrator (see the Installation and User Guide). These views filter which record has been neglected, so you can easily see who you need to contact.



## Last Contact Dashboard

Go to **Sales->Dashboards** to open up system dashboards. Select **Last Contact** to get a quick overview of all neglected records in CRM.





# **Support**

Please send any product issues or suggestions to [support@nusoftsolutions.com](mailto:support@atriosystems.com).

# **Disclaimer**

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