



Creating Views in DQM Reservations

Relationships allows DQM Editors to create separate views for specific subsets of contacts in the DQM Reservations tab so those contacts can be viewed separately from other contacts in the Reservations queue. The Settings section allows a DQM Editor to customize each view.

Creating a New View

To create a new view, click on **Create** in the top right corner of the screen in the Configuration > DQM > Reservations tab.



Name your view and click **Save**.

The new configuration name will now appear in the dropdown field in place of Default.

The recommended views are:

- Default
- Escalated Contacts
- Contacts with Errors

Go to the settings area, choose the preferred options (recommended settings for each view are listed below) and click **Save** again.

For that configuration to be presented automatically, click **Auto Load**. Whenever you access the Reservations area, that configuration will be automatically populated.

If **Auto Load** is not selected, the default will be presented when accessing Reservations, but the appropriate configuration can be chosen from the dropdown. Once the configuration is chosen, click **Load**.



Default View

Default views are user specific, so each DQM Editor can create their own default view with their preferred settings.

Recommended settings are:

- Type of Contacts = Both (check **Show Column** to identify New versus Updated contacts in the Reservations list view)
- Deleted Contacts = No
 - If delete capabilities are desired in the Reservations list view, check the **Show Column** box
- Escalated Contacts = No
 - If escalate capabilities are desired in the Reservations list view, check the **Show Column** box
- Ignored Contacts = No
 - If ignore capabilities are desired in the Reservations list view, check the **Show Column** box
- Contacts with Errors = No
- Contact Filter = None
- Columns = Select the columns important to you
- Contact Order = Select your preference (Ascending = Oldest to Newest and Descending = Newest to Oldest)
- Show My Reservations = Both
 - To view only contacts that are not yet reserved, select **No**
- Show Other People's Reservations = Varies
 - To view reservations for other DQM Editors, select one or multiple names in the box or select **All** to choose all DQM Editors
 - If you only want to view the contacts that are not yet reserved, select **None**

The screenshot shows the 'Settings' interface with the following configurations:

- Type of Contacts:** New Update Both. **Show Column**
- Deleted Contacts:** Yes No Both. **Show Column**
- Escalated Contacts:** Yes No Both. **Show Column**
- Ignored Contacts:** Yes No Both. **Show Column**
- Contacts with Errors:** Yes No Both. **Show Column**
- Contact Filter:** -- None --
- Columns:** Business Phone Number (Secondary), Business Fax Number, Business Web Site, CMC Custom 4, CMC Custom 1, FIRM Custom 2
- Contact Order:** --Capture Date--. Ascending Descending
- Show My Reservations:** Yes No Both
- Show Other People's Reservations:** [Text input field] with buttons for **All**, **None**, and **Invert**. **Show Reservations Column**

At the bottom right, there is a **Refresh Candidates** button.



Escalated Contacts View

These are contacts selected by a DQM editor(s) to be reviewed later, perhaps after investigation, or possibly by a manager.

Recommended settings are:

- Type of Contacts = Both (check **Show Column** to identify New versus Updated contacts in the Reservations list view)
- Deleted Contacts = No
 - If delete capabilities are desired in the Reservations list view, check the **Show Column** box
- Escalated Contacts = Yes (check **Show Column** to include a separate column to identify escalated contacts)
- Ignored Contacts = No
 - If ignore capabilities are desired in the Reservations list view, check the **Show Column** box
- Contacts with Errors = No
- Contact Filter = None
- Columns = Select the columns important to you
- Contact Order = Select your preference (Ascending = Oldest to Newest and Descending = Newest to Oldest)
- Show My Reservations = Both
- Show Other People's Reservations = Varies
 - To view reservations for other DQM Editors, select one or multiple names in the box or select **All** to choose all DQM Editors
 - If you only want to view the contacts that are not yet reserved, select **None**

Type of Contacts	<input checked="" type="radio"/> New <input checked="" type="radio"/> Update <input checked="" type="radio"/> Both	Show Column <input checked="" type="checkbox"/>
Deleted Contacts	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Both	Show Column <input type="checkbox"/>
Escalated Contacts	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both	Show Column <input checked="" type="checkbox"/>
Ignored Contacts	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Both	Show Column <input type="checkbox"/>
Contacts with Errors	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Both	Show Column <input type="checkbox"/>
Contact Filter	-- None --	
Columns	<input type="checkbox"/> Business Phone Number (Secondary) <input type="checkbox"/> Business Fax Number <input type="checkbox"/> Business Web Site <input type="checkbox"/> CHC Custom 4 <input type="checkbox"/> CHC Custom 1 <input type="checkbox"/> CHC Custom 2	
Contact Order	--Capture Date--	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending
Show My Reservations	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both	
Show Other People's Reservations	All None Invert	
		Show Reservations Column <input type="checkbox"/>
Refresh Candidates		



Contacts with Errors View

This is not an error in the contact itself as it was captured by Intapp from the signature block, but rather an error in the moving of the contact to the CMC or moving from the CMC to the CRM. The error shows on the edit screen just above the record in the Edit section of the DQM Editor page. The error will display in red, and generally has a brief description and an error number.

- The error could be an issue with the way one of the fields was edited and so cannot be moved to the CRM, in which case the editor could make the correction and commit the record.
- The error could also be some issue that cannot be resolved by an editor but will need to be reviewed by a manager or perhaps the system administrator to determine the issue and resolution.
- Generally, an editor could exclude Contacts with Errors when reserving contacts. A manager or system administrator should occasionally reserve only the contacts with errors to review, in order to resolve and move those contacts to the CRM.

Recommended settings are:

- Type of Contacts = Both (check **Show Column** to identify New versus Updated contacts in the Reservations list view)
- Deleted Contacts = No
 - If delete capabilities are desired in the Reservations list view, check the **Show Column** box
- Escalated Contacts = No
 - If escalate capabilities are desired in the Reservations list view, check the **Show Column** box
- Ignored Contacts = No
 - If ignore capabilities are desired in the Reservations list view, check the **Show Column** box
- Contacts with Errors = Yes
 - Check **Show Column** to include a separate column to identify contacts with errors
- Contact Filter = None
- Columns = Select the columns important to you
- Contact Order = Select your preference (Ascending = Oldest to Newest and Descending = Newest to Oldest)
- Show My Reservations = Both
- Show Other People's Reservations = Varies



- To view reservations for other DQM Editors, select one or multiple names in the box or select **All** to choose all DQM Editors
- If you only want to view the contacts that are not yet reserved, select **None**

A screenshot of the "Settings" interface in the Intapp application. The interface is divided into several sections:

- Type of Contacts:** Radio buttons for "New", "Update", and "Both". "Both" is selected. A "Show Column" checkbox is checked.
- Deleted Contacts:** Radio buttons for "Yes", "No", and "Both". "No" is selected. A "Show Column" checkbox is unchecked.
- Escalated Contacts:** Radio buttons for "Yes", "No", and "Both". "No" is selected. A "Show Column" checkbox is checked.
- Ignored Contacts:** Radio buttons for "Yes", "No", and "Both". "No" is selected. A "Show Column" checkbox is unchecked.
- Contacts with Errors:** Radio buttons for "Yes", "No", and "Both". "Yes" is selected. A "Show Column" checkbox is checked.
- Contact Filter:** A dropdown menu currently showing "-- None --". Below it is a search box with a "Select" button.
- Columns:** A list of checkboxes for "Contact Name Prefix", "Contact First Name", "Contact Middle Name", "Contact Last Name", "Contact Name Suffix", and "Formname". "Contact First Name", "Contact Last Name", and "Formname" are checked.
- Contact Order:** A dropdown menu showing "-- Capture Date --" and radio buttons for "Ascending" and "Descending". "Ascending" is selected.
- Show My Reservations:** Radio buttons for "Yes", "No", and "Both". "Both" is selected.
- Show Other People's Reservations:** A search box with buttons for "All", "None", and "Invert". Below the search box is a "Show Reservations Column" checkbox, which is checked.

At the bottom center of the interface is a "Refresh Candidates" button.