



Inform

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About NexJ Systems

NexJ Systems is the pioneer of Intelligent Customer Management. Our award-winning CRM is designed to help Wealth Management, Private Banking, Corporate and Commercial Banking, and Insurance firms revolutionize their business. Powered by artificial intelligence, our products help drive productivity, boost client engagement, and increase revenue. With users in over 60 countries, our customers benefit from our deep expertise across financial services verticals, strategic investment in innovation, and commitment to their success.

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Inform is a product in the NexJ Nudge-AI suite. It matches news articles from 15,000 public news feeds and firm-specific research to a contact based on their news interests. Use Inform to help strengthen relationships with your contacts through personalized emails containing articles matching their interests. Articles display in contact profiles as a feed. For any article listed, click the **View More** button to view the article in a browser. You can select which articles to share with a contact from the feed. In addition, you can filter the feed by date, country, and interest.

Share this content via email to help strengthen relationships with your clients by providing value-added interactions, and identifying new opportunities for sales and service.

If you're a retiree who recently opened your investment statements for March, you're probably feeling a bit anxious.

[VIEW MORE](#) [EMAIL](#)

Use the **Inform** tab on the Contacts workspace to view and share articles. In the **Inform** tab, you can:

- Add and remove interests
- Select interests to adjust the article list
- View and filter the article list
- Share articles with a contact

The **Inform** tab can display up to 20 articles at a time. To view more articles, click the **Load More** button at the bottom of the article list.

 The **Inform** tab does not display duplicate articles. When there are duplicate articles, you may see some blank spaces in the article list.

Managing interests

In the **Inform** tab, you can add new words and short phrases related to your contact's interests. The Inform engine uses these as keywords to generate the article list. You can then filter the article list by selecting one or more of the saved interests. At any time, you can delete an interest that was previously added to the contact's profile.

Adding interests

You can add interests in the **Inform** tab. Later, you can use these interests and any other previously added interests to generate the article list.

To add an interest, click the **Manage Interests** button  to open the Manage Interests dialog, and click **Add** . Enter a word or short phrase for the **Interest Value** (for example, retirement, or environment). The interest is added to the list of interests. Articles related to the listed interests are seen in the article list.

Deleting interests

To remove an interest, click the **Manage Interests** button  to open the Manage Interests dialog, hover over the interest you no longer require, and click the **Delete** button . A confirmation dialog opens, asking you to confirm that you want to delete the interest. Click **Delete** in the confirmation dialog.

Sharing articles with contacts

In the **Inform** tab, you can share articles with contacts by email.

To share articles with contacts, select the article you want to share and click **Email**. Your default email client is launched with the following information pre-populated:

- To - contains the email address of the contact
- Subject - (for example, Henry Collins has shared an article with you)
- Email body - contains a link to the article, title, and description

After you send an email, an email icon  displays on the selected article's card. If you hover over the icon, you will see a message stating that the article has already been sent to the current contact.

 Your external email provider is used to email the article, which means there is a limitation where Inform does not accurately detect if your email was actually shared with the selected contact. For example, if you choose not to send the email to the selected contact and close the email before sending it, Inform will still track this article as shared with the contact.

 If you select an article that has been previously emailed to a contact, and click **Email**, you will receive a message asking if you want to send the article again.

Filtering articles

You can filter the article list in the **Inform** tab by selecting one or more of the following filter chips:

- Country (country of origin)
- Interest
- Publication Date

 The Country filter chip is not seen by default. You must click **Filter options** , select **Add filter fields**, and then select **Country**.

Content in the article list is curated based on the filter criteria. For contacts with multiple saved interests, you can generate a targeted article list by filtering the feed to include only articles associated with specific interests. To do this, click the Interest filter, and select or clear checkboxes as needed. With each filter selection, the list of articles is re-generated. If there are no Interest selections, the generated results appear as if selecting all interests.

To clear your selection for an individual filter chip, click the clear button  on the filter chip.

To reset the currently selected filter to its default search criteria and remove all filter chips that do not display by default, click **Filter options** > **Reset filters**.

To hide filter chips, click **Filter options** > **Hide filter fields**.

 If you select an interest filter chip to filter articles for a contact, and this filter chip does not retrieve any articles, and then you navigate to the **Inform** tab for a different contact who does not have this interest, you will still see the same interest filter chip, and you will need to clear your selection for the interest filter chip.

Example

The following video example shows a user filtering for articles that were published on April 1, 2020 or later, using "retirement" as an interest, and using Canada as the country of origin.



Sorry, the video is not supported in this export.
But you can reach it using the following URL:

Movie URL not available.

Using operators for the Publication Date filter chip

When you select the Publication Date filter chip, you can choose from the following operators:

Operator	Description
equals	Search for articles with an exact match for the specified Date field value. The equals operator searches for the exact date you select.
not equals	Search for articles where the specified value does not match the value for the Date field. The not equals operator searches for articles that do not match the exact date you select. Search results with a not equals operator do not include articles for which the attribute is not set. Selecting this operator will always return zero results.
specified	Search for articles when the publication date is not easily found.
unspecified	Search for articles that do not have a publication date specified.
less than	Search for articles in which the value for the Date field is less than the value you specify in your search.
less than or equal to	Search for articles in which the value for the Date field is less than or equal to the value you specify in your search.
greater than	Search for articles in which the value for the Date field is greater than the value you specify in your search.
greater than or equal to	Search for articles in which the value for the Date field is greater than or equal to the value you specify in your search.
between	Search for articles in which the value for the Date field is between the Lower bound and Upper bound field values that you specify. The search results include articles with values that match the lower bound value, but do not include articles that match the upper bound value.
equals today	Search for articles that have been published on today's date, including the year.

Operator	Description
in the previous (days)	Search for articles in which the value for the Date field is a date in the past within the specified number of calendar days. For example, if you select the in the previous (days) operator and specify two days in the Days field, the search results include articles for yesterday and the day before yesterday.
in the next (days)	Search for articles in which the value for the Date field is a date in the future within the specified number of calendar days. For example, if you select the in the next (days) operator and specify two days in the Days field, the search results include articles for tomorrow, and the day after tomorrow.
today or before	Search for articles that have been published on either today's date or a date that has past.
today or after	Search for articles that have been published on either today's date or will be published on a future date.

Viewing audit trails for records

NexJ CRM retains a history of actions that users have performed on records in the system. When you complete an action, such as creating a new interest record for a contact or user, or deleting an existing interest record, the action is logged in the record's audit trail. Users with the appropriate privileges can view the history of these actions in a record's **Audit Trail** tab.

When modifying an interest, you can filter the data table on the **Audit Trail** tab to display specific event records.

NexJ provides the following filter chips that you can use to filter the audit trail:

- **Action**
Select an operator and an audit action; for example, Read (view a record) or Create (create a new object).
- **Date**
Select an operator and a date.
- **User**
Select an operator and the required user or users.

To add additional filter chips, click the **Filter options** button  and select **Add filter fields**. For more information, see Filter chips.

In the data table, select the action whose details you want to view. Depending on the type of action, additional details might be available. The details for the selected action display in the data table at the bottom of the tab. Each row represents a field that was updated as part of the action. The field's name, old value, and new value are displayed. If a field did not have a value originally, the value in the Old Value column will be blank.

To change which columns display in the data tables, click the **Select columns** button .

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