Messages to other Operators

Last Modified on 04/24/2019 2:47 pm EDT

Contact Management Preferences

Goto Setup-->Contact Management to set up parameters for Contact Management

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From here you can set up Contact Management Preferences, including 'pop up message preference' and 'check message interval' for sending messages between operators in RentalPoint

RP		Contact Management Para	meter Setup			x
Record Cleaning	Cus	tomer Custom Fields		Language Ter	ms	
Operator Settings	Activity Results	Message Status	Contact Cu	istom Fields	Auto Schedule	
Calendar Settings Start of Work Day: End of Work Day: Time Increment (minutes):	Pr	pp-ups Pop-up messages nable the 'Pop-up messages' of ressages sent to you by other ppear as a pop-up message or	ption if you want operators to h the screen.	•		
Work Days Sunday We Monday Thu Tuesday Frice Sat	ednesday ursday lay [urday	mail Address support@rentp.com] Automatically Send Email				
Default Activity Duration	n(s)	essages heck for messages every 1	Minutes	-		
Save Tab		✓ Save All	<mark>≻ <u>C</u>lose</mark>			

'Status' for message sending is set up via the 'Message Status' tab

- 1. Click the plus sign to add status description
- 2. Enter the description (the code is populated automatically)

3. Click Save Tab to save and stay in Contact Management Parameters OR click 'Save All' to save changes from all tabs and exit.

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Status Descriptions will then be visible in the drop down when sending a message

Sending a Message

From the Contacts or To Do Menu



Right Click anywhere on the grid

Click Work-->Send Message (or Ctrl Alt S)

523	New	•			jgreen@htt	p:/,	
	Dpen	•			lloyd@rent	p.c.	
768	🔁 View	•		020 7250 068	2 contriamies	R2@	
244	🔅 Work	►	🕒 Outlo	o <mark>k</mark> Synchroniza	ation	E	
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250-3000			Build Telemarket Script				
236	-9879		Leave Send	Desk Message	Ctrl+Alt+S	gn	
342-9897		Setup	Shows		дn		
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RP Send Message	×							
From Operator	RP							
To Operator	Sell2							
Contact	mytest MYTESET 🕞							
Status	Urgent							
Subject	MYTEST Needs a callback							
Message	☑ Urgent !							
Please call the client ASAP								
Message has been sent to Sell2.								
OK								
(
_	SendClose							

Note! If you have not set up your Contact Management Parameters, you'll run into issues with Message Status. See Contact Management Parameters for information on how to address this

View Messages Received

From the Contacts or To Do Menu



Right Click anywhere on the grid

📑 New 😿 Open) 	
👌 View	►	🛅 Operator Calendar 🚽
🌣 Work	-	🔳 Technician Calendar
🖶 Print	•	Messages
🔅 Admin		Telemarket Script
i Refresh		
🗉 Options	•	

RP ¥iew Message	es				×
Date	Time	From	Subject	Read	Resolved
2016-02-22	05:05 PM	RP	testing	N	N
2016-02-22	05:27 PM	RP	MYTEST Needs a callbac	N	N
		· · ·			
View Deta	ails	Mark Read Ma	rk Un-Read Mark All F	Read Ma	ark All Un-Read
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