## 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

| Setup | Others Help           | _ |
|-------|-----------------------|---|
| O     | perators              |   |
| Sa    | lespersons            |   |
| Ta    | x Authorities         |   |
| Lo    | cations               | ŀ |
| Di    | visions               |   |
| Fr    | eight                 |   |
| Tr    | ucks                  |   |
| Ro    | ooms                  |   |
| C.    | M.P                   |   |
| Cu    | urrencies             | ŀ |
| Pu    | ıblic Holidays        | ŀ |
| Da    | ata Folder            |   |
| Pa    | yment Terms           |   |
| Co    | ontact Management     |   |
| Ex    | pense Codes           |   |
| м     | iscellaneous Costs    |   |
| Ca    | ancellation Reasons   | ŀ |
| En    | nail Signatures       | ŀ |
| Fa    | st Report             |   |
| м     | aster Billing         |   |
| RF    | WebServices Licensing |   |
| A     | tivity Types          |   |
| Ta    | rget Margins          |   |
| Pa    | rameters              |   |

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 Pa  | rameter Setup               |              |               | x |
|---|---------------------------|--|-----------------------------|--------------|---------------|---|
| Record Cleaning   | Cus                       | stomer Custom Fields   |                             | Language Ter | ms            |   |
| Operator Settings   | Activity Results          | Message Status   | Contact Cu                  | ustom Fields | Auto Schedule |   |
| Calendar Settings<br>Start of Work Day:<br>End of Work Day:<br>Time Increment (minutes):  | E                         | op-ups<br>Pop-up messages<br>Enable the 'Pop-up messages'<br>messages sent to you by othe<br>appear as a pop-up message of<br>the second s | er operators to             | •            |               |   |
|   | ednesday<br>ursday<br>day | mail Address<br>support@rentp.com<br>] Automatically Send Email  |                             |              |               |   |
| Default Activity Duration          0       •       Hour(s)       1       •       Mi         Auto Schedule Re-call In :       0       •       Day(s) |                           | 1essages<br>Check 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.

| RP           | 1           |                   | Cont       | tact Management Pa | arameter Set   | tup                  | x             |
|--------------|-------------|-------------------|------------|--------------------|----------------|----------------------|---------------|
| F pro        | l Cleaning  |                   | Customer C | ustom Fields       |                | Language Ter         | ms            |
| <b>∟</b> rat | or Settings | Activity R        | esults     | Message Status     | Co             | ontact Custom Fields | Auto Schedule |
| ÷            | # 9         | Status Descriptio | n          |                    |                |                      |               |
|              | 1 U         | Urgent            |            |                    |                |                      |               |
| -            |             | General           | 2          |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              | 3           |                   |            | 3                  |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
|              |             |                   |            |                    |                |                      |               |
| L            | V           |                   |            |                    |                |                      |               |
| 8            | Save Tab    |                   |            | Save All           | × <u>C</u> los | se                   |               |

# 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)

| 23 New   |  | jgreen@http:/   |
|--|--|-----------------|
| Dpen   | +  | lloyd@rentp.c   |
| 768 💪 View   | • 020 7250 068   | 2 scottismie82( |
| 344 🕸 Work   | 🕑 📴 Outlook Synchroniza  | ation           |
| 282<br>282<br>234<br>234<br>234<br>234<br>2798<br>Print<br>Admin<br>Refresh<br>E Options | <ul> <li>Ø Send E-mail</li> <li>Ø Send E-mail to Distribution Line</li> <li>Build Distribution Line</li> <li>Build Call List</li> <li>Schedule Call List</li> <li>Make Call</li> <li>Receive Call</li> </ul> |                 |
| 250-3000   | Build Telemarket Sc  | ript            |
|  | Leave Desk   | -               |
| 236-9879   | Send Message   | Ctrl+Alt+S      |
| 342-9897   | Setup Shows  | gr              |
| 709 0391   | Setup Campaigns  |                 |

| RP Send Message   | ×   |
|-------------------|---|
| From Operator     | RP  |
| To Operator       | Sell2   |
| Contact           | mytest MYTESET 🕞  |
| Status            | Urgent  |
| Subject           | MYTEST Needs a callback   |
| Message           | ☑ Urgent !  |
| Please call the c | ient ASAP   |
|                   |   |
|                   | Ormation     Image: Comparison       Image: Message has been sent to Sell2. |
|                   | ОК  |
| (                 |   |
|                   |   |
| _                 | 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 | )<br>) |                       |
|--------------|--------|-----------------------|
| 👌 View       | ►      | 🛅 Operator Calendar   |
| 🌣 Work       |        | 🛅 Technician Calendar |
| 🖶 Print      | •      | P Messages            |
| 🔅 Admin      |        | Telemarket Script     |
| Refresh      |        |                       |
| 🗉 Options    | •      |                       |

| P View Message | es          |                |                        |         | 2                    |
|----------------|-------------|----------------|------------------------|---------|----------------------|
| 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 | Ν       | N                    |
| View Det       | ails        | Mark Read Mark | c Un-Read Mark All F   | Read Ma | ırk All Un-Read<br>★ |
| Remove Re      | ad Messages |                |                        |         | × <u>C</u> lose      |