



NewOrg Messaging Center

The Message Center allows staff to communicate securely regarding protected client data. It is HIPAA compliant, auditable, and allows searching.

- Staff can directly message with another colleague or create custom channels including multiple staff members.
- Can share contact, event, form/surveys and print forms with other staff in an easy, quick way. This will speed up administrative or operational tasks as compared to sending an email or using another communicative tool.

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Where can you access the NewOrg Messaging Center

The screenshot shows the NewOrg Management System interface. At the top, there is a navigation bar with the following items: Home, Contacts, Events, Mail, Donations, Staff, Reports, Files, Billing, and Dashboard. A red box highlights this entire navigation bar. A red arrow labeled '1' points to the 'Mail' icon. Another red arrow labeled '2' points to a speech bubble icon in the top right corner of the dashboard. The dashboard also displays sections for Recent Activity, This Week (with a calendar view), All Staff Notices, Staff Directory, Reminders, and Follow-Up Notifications.

- 1) When you are in one the main tabs that run along to the top of the NewOrg screens...
- 2) You will see a speech bubble at the top right of the screen.

The screenshot shows the 'Event Edit' form. At the top, there is a navigation bar with the following items: Standard Summar, Print, History, Outlook, and a speech bubble icon. A red arrow points from the speech bubble icon in the top navigation bar to the speech bubble icon in the top right corner of the event edit form. The form contains the following fields: Event (0900 EST - Sales Meeting), Contact (NewOrg Management Systems, Inc.), Type (Meeting), Date (05/22/2020), Start Time (9:00 AM), End Time (10:00 AM), Minutes (60), and Remind me (0 days before this event).

- You will also see the speech bubble at the top of all events.

Creating specific user channel/s for ALL users, so you can all communicate together

- Click the speech bubble icon on the top right of the NewOrg screen

- Click the “+” icon to the right of the “Channels” header on the top left of the screen.

The screenshot shows the NewOrg Messaging Center interface. On the left, there are navigation panels for 'Channels' and 'Staff'. The main area displays a chat window for 'All Staff' with a message from David Crouch: 'has been approved. Happy Easter everyone!'. A 'Create New Channel' dialog box is overlaid on the chat. The dialog contains the following fields:

- New Channel Name:** General
- Description:** For all staff to message organizational related messages.
- Type:** Public (selected from a dropdown menu)

Three red arrows point to these fields, numbered 1, 2, and 3 respectively.

- 1) Select the “New Channel Name”.
- 2) Enter what the channel is meant to be used for in the “Description” text box.
- 3) Select “Public” from the “Type” dropdown.

This screenshot is similar to the previous one, showing the 'Create New Channel' dialog box. In this view, the 'Save' button at the bottom of the dialog is highlighted with a red box, and a red arrow points to it from the left.

- Click the “Save” button to create the channel.

Creating a user channel that is only visible to specific users, so a specific group can communicate without all other users seeing it

- Click the speech bubble icon on the top right of the NewOrg screen

- Click the “+” icon to the right of the “Channels” header on the top left of the screen.

The screenshot shows the NewOrg Messaging Center interface. On the left, there are 'Channels' (All Staff, Finance, Sales, Support) and 'Staff' (David Crouch, Dawn Sheehy, Giovanni Bejarano, Jared Ferguson, John Baker, Maria Thorne, Mario Coryell, Mike Bruyere, Owen Crouch, Permissions Test, Peter Jacobs, Sebastian Recce, Support Agent, Test user). The main area shows a chat window for 'All Staff' with a message from David Crouch: 'has been approved. Happy Easter everyone!'. A 'Create New Channel' dialog box is open in the foreground, with three red boxes and arrows indicating steps: 1) 'New Channel Name' (containing 'General'), 2) 'Description' (containing 'For all staff to message organizational related messages.'), and 3) 'Type' dropdown (with 'Private' selected). The dialog also has a 'Save' button at the bottom.

- 1) Select the “New Channel Name”.
- 2) Enter what the channel is meant to be used for in the “Description” text box.
- 3) Select “Private” from the “Type” dropdown.

The screenshot shows the NewOrg Messaging Center interface, similar to the previous one. The 'Create New Channel' dialog box is still open, but now the 'Save' button at the bottom is highlighted with a red box and a red arrow pointing to it. The 'New Channel Name' is 'General', the 'Description' is 'For all staff to message organizational related messages.', and the 'Type' is 'Public'.

- Click the “Save” button to create the channel.

Edit Channel ✕ Close

Channel Name	General
Description	For all staff to message organizational related messages.
Status	Active ▼
Access	By Request ▼
Created By	Nick Rowan on 5/22/2020

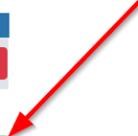
[Save](#)

Requests to Join Channel

Member Name	Dept/Loc/Type	Date Requested	
David Crouch	Administration Washington, DC Staff	5/22/2020	✔ Approve ✕ Deny

Channel Members [+ Add Member](#)

Member Name	Date Added	Added By	
Nick Rowan	5/22/2020	Nick Rowan	✕ Delete
David Crouch	5/22/2020	Nick Rowan	✕ Delete



- Click the “Add Member” button.

Edit Channel ✕ Close

Channel Name: General

Description: For all staff to message organizational related messages.

Status: Active

Access: ⌵

Created By: ⌵

Select Member to Add

David Crouch

Add Member

✕ Deny

Add Member

Member Name	Date	Action
Nick Rowan	5/22/2020	✕ Delete
David Crouch	5/22/2020	✕ Delete

- 1) Select the staff user from the “Select Member to Add” dropdown.
- 2) Click the “Add Member” button below the dropdown.
- 3) Click the “Close” button at the top of the event.

Creating a specific user channel for a select group of users, but allows other users to request to join

- Click the speech bubble icon on the top right of the NewOrg screen

- Click the “+” icon to the right of the “Channels” header on the top left of the screen.

The screenshot displays the NewOrg Messaging Center interface. On the left, there are navigation panels for 'Channels' and 'Staff'. The main area shows a chat window for 'All Staff' with a message from David Crouch. A 'Create New Channel' dialog box is open in the center, with three red arrows and numbers indicating the steps: 1) 'New Channel Name' (set to 'General'), 2) 'Description' (set to 'For all staff to message organizational related messages.'), and 3) 'Type' (set to 'By Request').

- 1) Select the “New Channel Name”.
- 2) Enter what the channel is meant to be used for in the “Description” text box.
- 3) Select “By Request” from the “Type” dropdown.

This screenshot is similar to the previous one, but the 'Save' button at the bottom of the 'Create New Channel' dialog box is highlighted with a red box and a red arrow, indicating the final step in creating the channel.

- Click the “Save” button to create the channel.

Requesting access to a channel

The screenshot shows the NewOrg Management System dashboard. At the top right, there is a user profile for Nick Rowan, dated Friday, May 22, 2020, and a blue speech bubble icon. A red arrow points from the speech bubble icon towards the center of the dashboard.

- Click the speech bubble icon on the top right of the NewOrg screen

The screenshot shows the NewOrg Messaging Center interface. On the left, there is a 'Channels' list with various categories like All Staff, Random, Development, Private setting channel, Finance, General, Sales, Support, and test. The 'test' channel is highlighted with a red circle and labeled '1'. A pop-up window titled 'Request Access to Channel: test' is open, showing a 'Request Access' button. A red arrow points to this button and is labeled '2'. The background shows a chat window with messages from Nick Rowan.

- 1) when you see a lightly greyed out channel it means you are not approved to join it but you can request to join. Click the gear icon on the channel row.
- 2) Click "Request Access" button on pop-up window.

Approving/Denying users who have requested or are responding to you newly created event

- Click the speech bubble icon on the top right of the NewOrg screen

- Click the gear icon on the right on the newly made channel you made.

Edit Channel

[✕ Close](#)

Channel Name	General
Description	For all staff to message organizational related messages.
Status	Active
Access	By Request
Created By	Nick Rowan on 5/22/2020

[Save](#)

Requests to Join Channel

Member Name	Dept/Loc/Type	Date Requested	
David Crouch	Administration Washington, DC Staff	5/22/2020	✓ Approve ✕ Deny

Channel Members

[+ Add Member](#)

Member Name	Date Added	Added By	
Nick Rowan	5/22/2020	Nick Rowan	✕ Delete

- 1) Click the “Approve” or “Deny” button on the user who wishes to join the channel or are responding to your original invite.
- 2) Click the “Close” button at the top of the screen.

Removing yourself or another user from a channel

The screenshot shows the NewOrg Management System dashboard. At the top right, the user's name 'Nick Rowan' and the date 'Friday, May 22, 2020' are displayed. A red arrow points to a blue speech bubble icon located to the right of the user information. The dashboard includes various sections: 'Recent Activity', 'This Week' (with a calendar view for May 22-26), 'All Staff Notices' (a table of notices), 'Staff Directory', 'Search Contacts', 'Reminders', and 'Follow-Up Notifications'.

- Click the speech bubble icon on the top right of the NewOrg screen

The screenshot shows the NewOrg Messaging Center. On the left, there is a 'Channels' list with options like 'All Staff', 'Random', 'Private setting channel', 'Finance', 'General', 'Sales', and 'Support'. A red arrow points to the gear icon next to the 'General' channel. The main area displays several chat windows, including 'All Staff', 'John Baker', 'David Crouch', and 'General'. The 'All Staff' window shows messages from David Crouch and Maria Thorne. The 'John Baker' window shows a message from 'Contact: NewOrg Organization'. The 'David Crouch' window shows a message 'Cheers' and an event notification. The 'General' window shows a 'Test message'.

- Click the gear icon on the right on the newly made channel you made.

Edit Channel

Channel Name General ✕ Close

Description For all staff to message organizational related messages.

Status Active ▼

Access By Request ▼

Created By Nick Rowan on 5/22/2020

Save

Requests to Join Channel

Member Name	Dept/Loc/Type	Date Requested	
David Crouch	Administration Washington, DC Staff	5/22/2020	✓ Approve ✕ Deny

Channel Members

+ Add Member

Member Name	Date Added	Added By	
Nick Rowan	5/22/2020	Nick Rowan	✕ Delete
Jared Ferguson	5/22/2020	Jared Ferguson	✕ Delete

- 1) Click the “Delete” button on the far right your user name or another user depending who you want removed from the channel.
- 2) Click the “Close” button at the top of the event.

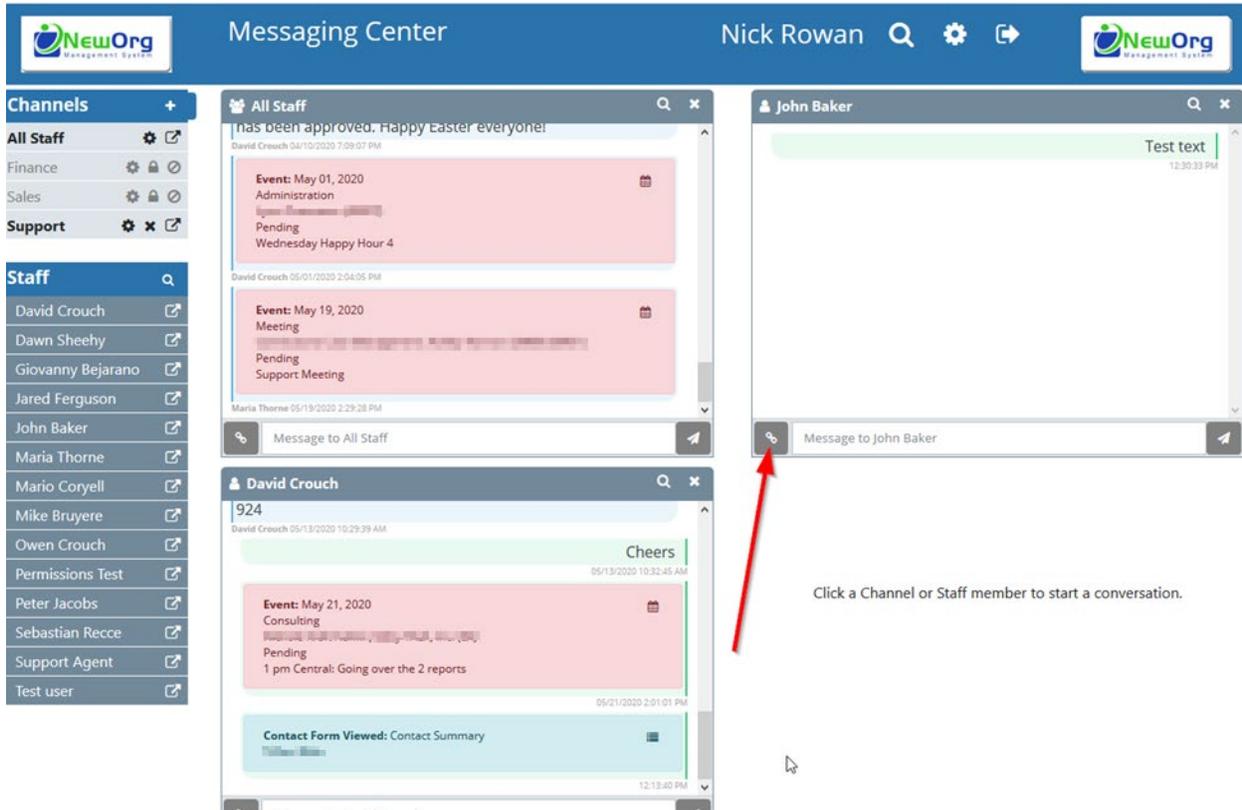
How to send a message/s to an individual or group channel from a NewOrg tab

The screenshot shows the NewOrg Management System interface. At the top right, the user's name 'Nick Rowan' and the date 'Friday, May 22, 2020' are displayed next to a blue speech bubble icon. A red arrow points to this icon. The dashboard includes several sections: 'Recent Activity' with 'Open' and 'Upload' buttons; 'This Week' with a calendar view showing events like 'Meeting' and 'Support Ticket'; 'All Staff Notices' with a table of notices; 'Staff Directory' with a search bar and 'View Details' button; 'Reminders' and 'Follow-Up Notifications' tables; and a 'Search Contacts' section with a 'Find' button and 'Recent Contacts' list.

- Click the speech bubble icon on the top right of the NewOrg screen

The screenshot displays the NewOrg Messaging Center interface. At the top, the header includes the NewOrg logo, the title "Messaging Center", the user name "Nick Rowan", and navigation icons. On the left, there are two main menu sections: "Channels" (containing "All Staff", "Finance", "Sales", and "Support") and "Staff" (listing various staff members like David Crouch, Dawn Sheehy, etc.). The main area shows three message conversation windows: "All Staff", "John Baker", and "David Crouch". Each window displays a message history with text, event notifications, and a "Message to [Recipient]" input field at the bottom. A red box highlights the "Message to John Baker" input field and the send button (a green paper airplane icon). A red circle with the number "3" is placed below the input field, with two red arrows pointing from it to the input field and the send button. Below the screenshot, a text instruction reads: "Click a Channel or Staff member to start a conversation."

- 1) If wishing to send to a specific group of user, click one of the channel menu options on the top left of the screen. If you wish to message an individual skip to step 2 of this screenshot and skip to step 3. If wishing to message an individual user, go to step 2 of this screenshot.
 - 2) If wishing to message a single staff user, click their name on the left hand menu.
 - 3) A message tile will appear on the screen with either the channel name or staff name at the top of it. If messaging just a text message, enter it into the message text field and then click the paper airplane icon to send it.



The screenshot shows the NewOrg Messaging Center interface. On the left, there is a sidebar with 'Channels' and 'Staff' sections. The 'Channels' section includes 'All Staff', 'Finance', 'Sales', and 'Support'. The 'Staff' section lists various staff members including David Crouch, Dawn Sheehy, Giovanni Bejarano, Jared Ferguson, John Baker, Maria Thorne, Mario Coryell, Mike Bruyere, Owen Crouch, Permissions Test, Peter Jacobs, Sebastian Recce, Support Agent, and Test user. The main area displays three message tiles. The top tile is for 'All Staff' and contains a message from David Crouch dated 04/10/2020 7:09:07 PM, followed by an event for May 01, 2020 (Administration) and another event for May 19, 2020 (Meeting). The middle tile is for 'John Baker' and contains a message from Maria Thorne dated 05/19/2020 2:29:28 PM, followed by an event for May 21, 2020 (Consulting). The bottom tile is for 'David Crouch' and contains a message from David Crouch dated 05/13/2020 10:29:39 AM, followed by a 'Cheers' message dated 05/13/2020 10:32:45 AM and a 'Contact Form Viewed: Contact Summary' message dated 06/21/2020 2:01:01 PM. A red arrow points to the 'Message to John Baker' button at the bottom left of the John Baker message tile. A text box on the right says 'Click a Channel or Staff member to start a conversation.'

- To message a channel or staff member a recent activity item of yours, for example, a contact, event, form/survey or print form, click the link icon on the bottom left of the message tile.

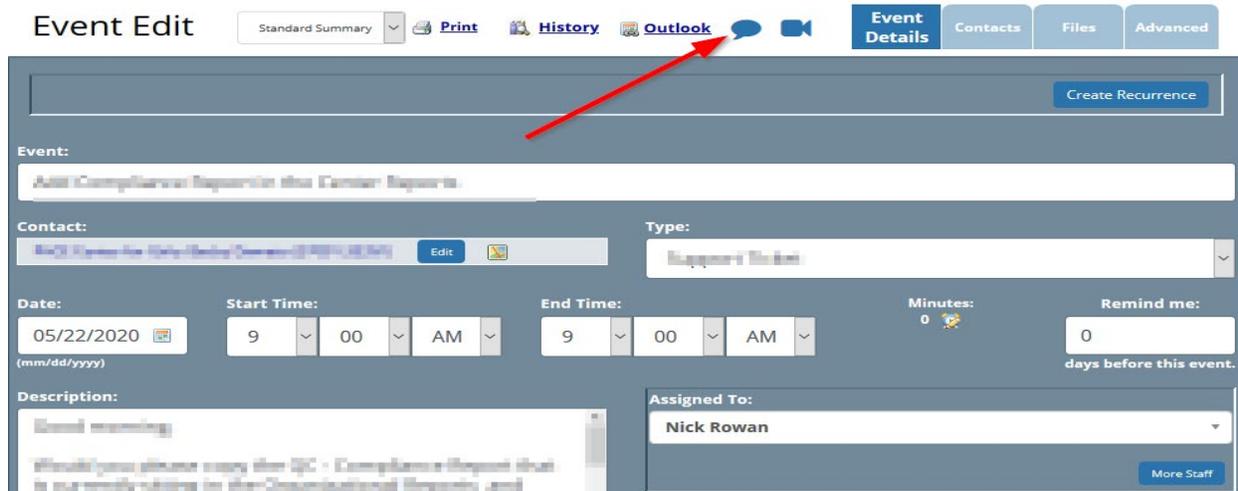
The screenshot displays the NewOrg Messaging Center interface. On the left, there is a sidebar with 'Channels' and 'Staff' lists. The main area shows a chat window for 'All Staff' with messages from David Crouch and Maria Thorne. A 'Recent Activity' pop-up window is centered, titled 'Recent Activity' with the subtitle 'Click an item to send it to John Baker'. The pop-up contains three items: a 'Contact' entry for 'John Baker' from 'Support Services' Organization, a 'Contact Form Viewed' entry for 'Contact Summary', and an 'Event' entry for 'May 21, 2020'. Red arrows point from each of these items to the chat window on the right, which shows a message from John Baker with the text 'Test text'.

- A “Recent Activity” window will pop-up. Just click the contact, event, form/survey or print form item you wish to share.

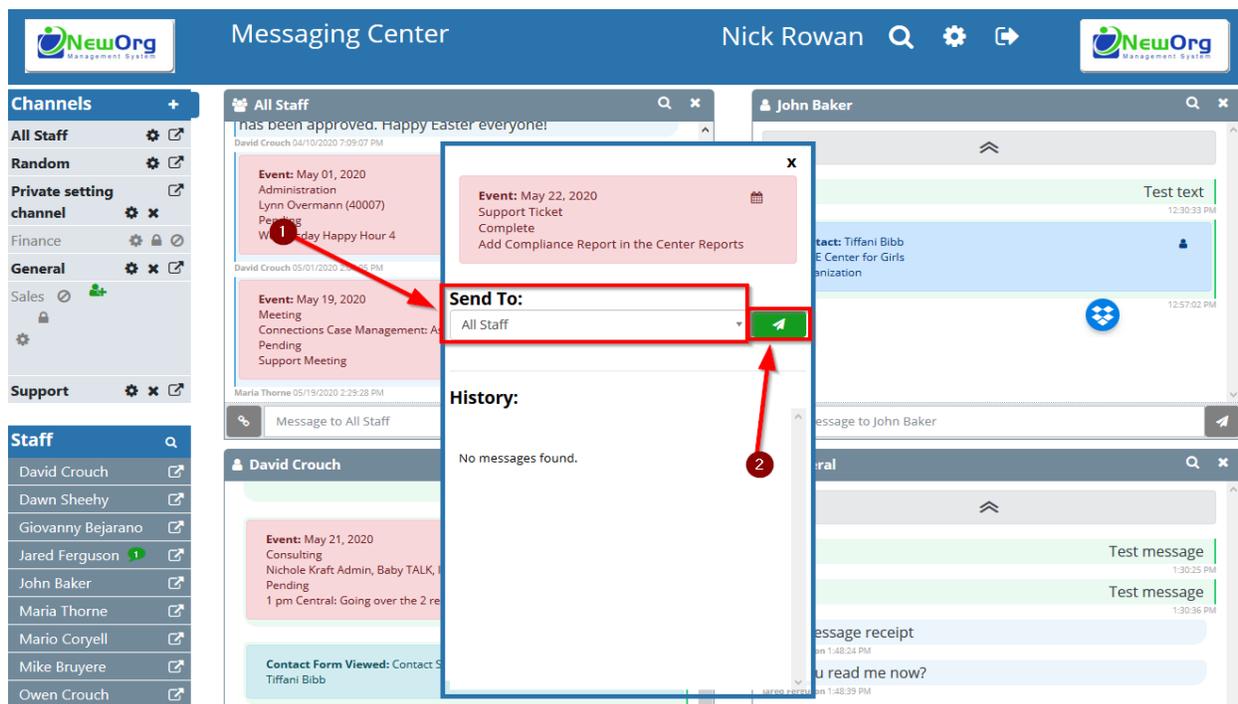
The screenshot displays the NewOrg Messaging Center interface. At the top, the header includes the NewOrg logo, the title 'Messaging Center', the user name 'Nick Rowan', and navigation icons for search, settings, and share. On the left, there are two main sections: 'Channels' and 'Staff'. The 'Channels' section lists 'All Staff', 'Finance', 'Sales', and 'Support'. The 'Staff' section lists various team members including David Crouch, Dawn Sheehy, Giovanni Bejarano, Jared Ferguson, John Baker, Maria Thorne, Mario Coryell, Mike Bruyere, Owen Crouch, Permissions Test, Peter Jacobs, Sebastian Recce, Support Agent, and Test user. The main content area shows three message tiles. The top tile is from 'All Staff' and contains an event notification for 'May 01, 2020 Administration' and another for 'May 19, 2020 Meeting'. The middle tile is from 'John Baker' and contains a 'Test text' message. The bottom tile is from 'David Crouch' and contains a 'Cheers' message and an event notification for 'May 21, 2020 Consulting'. A red arrow points to a link icon (a small circle with a plus sign) located at the bottom left of the 'Message to John Baker' tile. Below the screenshot, a text instruction reads: 'Click a Channel or Staff member to start a conversation.'

- To message a channel or staff member a recent activity item of yours, for example, a contact, event, form/survey or print form, click the link icon on the bottom left of the message tile.

Sending event information to a user or channel from an event, for example, for review or to give them event link so they can join a video conference



- Click the speech bubble icon on the top right of event screen you are on.



- 1) Choose the channel or user you wish to send the event link to.
- 2) Click the paper plane icon to send it to the channel or user.

How to know when you have a message to review, be it sent to you directly or to a channel

The screenshot shows the NewOrg Management System dashboard. At the top right, the user's name 'David Crouch' and the date 'Friday, May 22, 2020' are displayed. A green speech bubble icon with the number '1' is located in the top right corner, indicating a new message. A red arrow points from the text below to this icon. The dashboard includes a navigation bar with buttons for Home, Contacts, Events, Mail, Donations, Staff, Reports, Files, Billing, and Dashboard. Below the navigation bar, there are several panels: 'Recent Activity', 'This Week' (showing a calendar for Friday, May 22), 'All Staff Notices' (a table of notices), and 'Staff Directory' (a list of staff members).

- When you see a number in the speech bubble icon on the top right of the screen it means there is a message to review, be it sent to you directly or to a channel. The number signifies the number of messages to review. Click the speech bubble.

The screenshot shows the NewOrg Messaging Center interface. The top bar includes the NewOrg logo, the text 'Messaging Center', the user's name 'David Crouch', and search, settings, and share icons. On the left, there are two main sections: 'Channels' and 'Staff'. The 'Channels' section lists 'All Staff', 'Development', 'Finance', 'Sales', and 'Support'. The 'Support' channel has a green speech bubble icon with the number '1' next to it. The 'Staff' section lists several staff members, including 'Nick Rowan', who also has a green speech bubble icon with the number '1' next to his name. A red arrow points from the text below to the 'Support' channel and 'Nick Rowan' staff member. The main area of the screen contains two large, faint text prompts: 'Click a Channel or Staff member to start a conversation.'

- You will see a green speech bubble to indicate where the new message is for you to review. The number representing the number of messages to review within that channel or direct message. Click the channel or staff direct message menu item.

Channels +

All Staff ⚙️ ↗️

Development ✕ ↗️

Finance ↗️ ⚙️ ✕

Sales ⚙️ ✕ ↗️

Support ⚙️ ✕ ↗️

Staff 🔍

Dawn Sheehy ↗️

Giovanni Bejarano ↗️

Jared Ferguson ↗️

John Baker ↗️

Maria Thorne ↗️

Mario Coryell ↗️

Mike Bruyere ↗️

Nick Rowan 🟢 ↗️

Owen Crouch ↗️

Nick Rowan 🔍 ✕

Nick Rowan 05/13/2020 10:32:45 AM

Event: May 21, 2020
Consulting
Pending
1 pm Central: Going over the 2 reports

Nick Rowan 05/21/2020 2:01:01 PM

Contact Form Viewed: Contact Summary

Nick Rowan 12:13:40 PM

Written message example

Nick Rowan 1:27:22 PM

Message to Nick Rowan

Click a Channel or Staff member to start a conversation.

Click a Channel or Staff member to start a conversation.

Click a Channel or Staff member to start a conversation.

- Read the message sent to you. Click into the message text field of the message tile to remove the review notification and reply.

Setting up frequency of email or SMS (not yet live yet) notifications of new messages to review

- Click the speech bubble icon on the top right of the NewOrg screen

- 1) Click the gear icon at the top right of the screen.
- 2) Choose the frequency of the alerts from the “Send Alerts” dropdown.
- 3) Select alert method within the “Send To” dropdown. SMS is not yet live.
- 4) Click the “Save” button.

Searching across all your messages for specific information

- Click the speech bubble icon on the top right of the NewOrg screen.

- 1) Click the magnifying glass icon at the top of screen.
2) Enter search items into the text field indicated. When searching you can use operators to refine your search. The following characters can be used - for NOT, & for AND, space for OR, and "some text" for multi-word phrases.