

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.

Contents

Where can you access the NewOrg Messaging Center2
Creating specific user channel/s for ALL users, so you can all communicate together
Creating a user channel that is only visual to specific users, so a specific group can communicate without all other users seeing it
Creating a specific user channel for a select group of users, but allows other users to request to join9
Requesting access to a channel11
Approving/Denying users who have requested or are responding to you newly created event
Removing yourself or another user from a channel14
How to send a message/s to an individual or group channel from a NewOrg tab16
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
How to know when you have a message to review, be it sent to you directly or to a channel
Setting up frequency of email or SMS (not yet live yet) notifications of new messages to review24
Searching across all your messages for specific information25

Where can you access the NewOrg Messaging Center

	ontent Settings Logout Help Change Password Dome & Contacts I	Select Language ✓ Bowered by Sexist Translate ● Staff ● Reports ● Files I Billing ● Dashbo	Nick Rowan Friday, May 22, 2020 ard
Recent Activity	🛗 This Week	★ All Staff Notices	
Constant Providence 🔺 🍐	Friday, May 22 From Office Lone) ^	Date/Time Name Type From ^	My wailability Vacation ↓
🖉 Open 🔔 Upload	AM Support	© 05/25/2020 9:00:00 AM	View Details
	E 9:00 AM - 9:00 AM	O6/06/2020 Joseph and Administration Ferguson	
Search Contacts	Monday, May 2: Monday May 2: Meeting	06/12/2020 p. cministration Ferguson	Name V Sort
Advanced Search	Tuesday, May 2t	2 06/19/2020 Jared	Constituent
	E 11:00 AM - 12:00 Training	9:30:00 AM	Control Programme Control Progr
Recent Contacts	Wednesday, Ma Office (Home) B 1:00 PM - 2:00 Training	06/26/2020 a a Administration Ferguson 9:30:00 AM a a b a b a b a b b a b b a b a b b a b a b b a b a b a b a b a b a b a b a b a b a b a b a b a b a b a b a b a b a	 Finite Center Finite Center
-CET insula -	Reminders	Follow-Up Notifications	Contraction of the second
Terrare Content of the Content of th	Date/Time Contact Type	Date/Time Contact Type	 Totactering total Totactering total
Test Connect Test charles in a Test by Exercise	E 05/12/2020 Pm Performance Remove Remove	E 01/28/2020 Internal Support Remove	Contraction Association

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.

Event Edit	Standard	Summar 🔻	<u>Print</u>	🚉 His	<u>story</u>	.	Outlook	2		K	Event Details	Contacts	Files	Advanced
This is the child of a recurring event 1 Week, Friday and ends after 47 time(s) and ends on 01/01/2021 View Parent														
Event:														
0900 EST - Sales Mee	eting													
Contact:		-					Type:							
No.0976-spectral last	ana, inay 198	Edit	X				Mee	ting	5					*
Date:	Start Time:			En	d Tim	e:					Minu	ites:	Re	mind me:
05/22/2020 🗷	9 •	00 •	AM •	,	10	•	00	•	AM	•		*	0	
(mm/dd/yyyy)		1	1							d			days be	fore this event.
Description:							Assign	ed T	0:		Stat	us:	Mi	nutes:Payroll:

• 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

		Messaging Center		Nick Rowa	n Q	۰	
Channels	+	🛎 All Staff	Q x	🛔 John Baker			Q x
All Staff	🌣 🗗 Ne	ew channel. Puch 04/10/2020 7:09:07 PM	^				Test text
Finance	♦ 🔒 ⊘	Event: May 01, 2020	-				12:30:33 PM
Sales		Administration		Contact: 1			<u>د</u>
Support	✿ × ♂	Pending Wednesday Happy Hour 4		Örganizatio	n		
Staff	۹	David Crouch 05/01/2020 2:04:05 PM					12:57:02 PM
David Crouch	C	Event: May 19, 2020	#				
Dawn Sheehy	C	Communities Care Romage were children ihre war Olifick DelDite					
Giovanny Beja	rano 🖸	Pending Support Meeting					
Jared Fergusor	n 🖸	Maria Thorne 05/19/2020 2-29-28 PM	,	,			
John Baker	C	Message to All Staff		& Message	to John Baker	r	
Maria Thorne	C.				-		
Mario Corvell	2	🛔 David Crouch	Q ×				

• Click the "+" icon to the right of the "Channels" header on the top left of the screen.

	Messaging Center	Nick Rowan Q 🌣 🕞 🖄 Neu Org
Channels + All Staff Image: Comparison of the state	All Staff David Devels 64/10/2020 709/07 PM Event: May 01, 2020 Administration Pending	Q × John Baker Q ×
Staff Q David Crouch C ² Dawn Sheehy C ² Giovanny Bejarano C ² Jared Ferguson C ² John Baker C ² Maria Thorne C ²	Devid Creuch 05/51/2020 1 M Event: May 19, 2020 1 M Meeting erif Pending erif Support Meeting erif Maria There 65/15/2020 22:5:28 M Description For all staff For all staff David Crour Description	ganizational essage to John Baker
Mario Coryen C Mike Bruyere C* Owen Crouch C Permissions Test C* Peter Jacobs C* Sebastian Recce C* Support Agent C* Test user C*	Type What d'ya think of this? David Crouch Substances and forget to get with Ph David Crouch Substances 555:12 PM David Crouch Substances 555:12 PM David Crouch Substances 555:12 PM David Crouch Substances 555:12 PM David Crouch Substances 555:12 PM David Crouch Substances 555:12 PM David Crouch Substances 555:12 PM David Crouch Substances 555:12 PM	Click a Channel or Staff member to start a conversation.

• 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.

	Org	Messaging Cente	r	Ni	ick Ro	wan	Q	• 0	•	
Channels	+	😁 All Staff	۵ پ	:	🛔 John I	Baker				Q x
All Staff	۵ نې	nas been approved. Happy E David Crouch 04/10/2020 7:09:07 PM	aster everyone:	^						Test text
Finance	♦ ≙ ⊘	Event: May 01, 2020	m							12:30:33 PM
Sales		Administration			Con	tact:	-			<u>د</u>
Support	♦ × 🖓	Pending				anization				
		Wednesday Happy Hour 4			x					12:57:02 PM
Staff	Q	David Crouch 05/01/2020 2:04:05 PM	Create New Channel							
David Crouch	C	Event: May 19, 2020								
Dawn Sheehy	C.	Ormanica Can Hangeman I	New Channel Name							
Giovanny Beja	rano 🖸	Pending Support Meeting	General							
Jared Fergusor	n 🖸	Maria Thorne 05/19/2020 2:29:28 PM	Description							
John Baker	C	Mesege to All Staff	For all staff to message organizati	onal		essage to l	ohn Baker			
Maria Thorne	C	Messige to Air Stan	related messages.			coolige to j	Jiiii bakei			
Mario Coryell	C.	🛔 David Crouch								
Mike Bruyere	C		Туре							
Owen Crouch	C.		Public		~					
Permissions Te	st 🖸	What d'ya think of this?								
Peter Jacobs	C	David Crouch 04/03/2020 4:33:09 PM	Save			Click a Ch	annel or S	Staff mem	ber to sta	rt a conversation.
Sebastian Reco	ce 🖸	David Crouch 04/05/2020 5:05:12 PM								
Support Agon										

• Click the "Save" button to create the channel.

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

	ontent Settings Logout Help Change Password	Select Language V Powered by Google Translate	Nick Rowan Friday, May 22, 2020
Management System	ome 🕻 🕻 Contacts 🛛 🋗 Events 🛛 🔄 Mail 🗍 💲 Donations	🛔 Staff 🛛 🔇 Reports 🖉 🖺 Files 🛛 🖾 Billing 🖉 🖓 Dashbo	bard
Recent Activity	🚔 This Week	v [⊲] All Staff Notices	Staff irectory
	Friday, May 22 📓 From Office (Home) 📤	Date/Time Name Type From ^	My Availability
Topriate-	9:00 AM - 10:00 Meeting AM	€ 05/25/2020 Vacation/Holiday	View Details
✓ Open	9:00 AM - 9:00 AM	9:06/06/2020 Administration	
Search Contacts	Monday, May 25 Office (Home)		Name V Sort
Find	H 11:00 AM - 12:00 PM Meeting		#TistiCost
Advanced Search	Tuesday, May 26 Office (Home)	06/19/2020 Administration	Tanking State
	PM Internation	9:50:00 AM	a figure again
Recent Contacts	Wednesday, Ma	06/26/2020 Contraction	The last
Rectant Index Inside	€ 1:00 PM - 2:00 Тraining у	9:30:00 AM	No. 2 Marcol America
hap hates. The been bendered as	Reminders	Follow-Up Notifications	Thursday
landing to general	Date/Time Contact Type	Date/Time Contact Type	 Vien justs
Network Installet		01/28/2020	Trabatta Inte

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

		Messaging Center		Nick Rowan Q 🌣 🕞 🕐 NewOrg
Channels	+	🖁 🕌 All Staff	Q x	× 🔓 John Baker Q :
All Staff	\$ 🖉	New channel. puch 04/10/2020 7:09:07 PM	^	1 Test text
Finance	✿ ⊘	Event: May 01, 2020	-	12:30:33 PM
Sales	\$ ≙ ⊘	Administration		Contact:
Support	◇ × ♂	Pending Wednesday Happy Hour 4		Organization
Staff	Q	David Crouch 05/01/2020 2:04:05 PM		12:57:02 PM
David Crouch	C	Event: May 19, 2020	m	
Dawn Sheehy	Ľ	Allerting Conventions Care Harrygeneous Afrika, Harrian Olikik (MCH)		
Giovanny Beja	rano 🖸	Pending Support Meeting		
Jared Ferguso	n 🖸	Maria Thome 05/19/2020 2:29:28 PM		×
John Baker	C	Message to All Staff		Message to John Baker
Maria Thorne	C			
Mario Corvell	2	🛔 David Crouch	α 🗙	×

• Click the "+" icon to the right of the "Channels" header on the top left of the screen.

	2	Messaging Cente	r:	Ni	ick Rowan Q	۰ ا	
Channels All Staff Finance Ø Sales Ø	+ 2 4 0 4 0	 All Staff Nais Deen approved: Happy E Gevel Gevel 64/10/2020 7:06:37 FM Event: May 01, 2020 Administration 	aster everyone:	*	▲ John Baker		Q X Test text
Support OR Staff David Crouch	× ۲ م ۲	Pending Wednesday Happy Hour 4 David Crouch 05/01/2020 11 M Event: May 19, 2020	Create New Channel		X pnization		12:5702 PM
Dawn Sheehy Giovanny Bejarano Jared Ferguson John Baker	2222	Meeting entre Pending Support Meeting Maria Theme 55/19/020 2:3-28 FM Message to All Staff	New Channel Name General Description For all staff to message organi related messages.	zational	essage to John Bak	er	-
Maria Thorne Mario Coryell Mike Bruyere Owen Crouch	2 2 2 2 2 3	David Crour	Type Public		di V		
Peter Jacobs Sebastian Recce Support Agent	1 2 2 2	what d ya think of this? Dwid Crewch 04/03/020 43309 PM Lets not forget to get with Ph Dwid Crewch 04/05/020 505 12 PM Dwid Crewch 04/05/020 505 00 PM	Private By Request Public	₩	Click a Channel o	r Staff member to sta	art a conversation.
lest user	<u>ک</u>	Test David Crouch 04/05/2020 6:12:51 PM	This is coal				

- 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.

		Messaging Center		Nick Ro	owan Q	•	€	
Channels	+	嶜 All Staff	Q ×	💄 Johr	ו Baker			Q ×
All Staff	€ 2	nas been approved. Happy Ea David Crouch 04/10/2020 7:09:07 PM	aster everyone:					Test text
Finance	\$ ≙ ⊘	Event: May 01, 2020	m					12:30:33 PM
Sales	♦ ≙ ⊘	Administration	_	Co	ontact:			<u>ـ</u>
Support	🌣 🗙 🖸	Pending Wednesday Happy Hour 4			anization			
Staff	٩	David Crouch 05/01/2020 2:04:05 PM	Create New Channel	X				12:57:02 PM
David Crouch	C	Event: May 19, 2020	Create New Channel					
Dawn Sheehy	Ľ	Meeting	New Channel Name					
Giovanny Beja	arano 🖸	Pending Support Meeting	General					
Jared Ferguso	in 🖸	Maria Thomas 05/19/2020 2:29:20 DM	Description					
John Baker	2	Maria mone os 19200 22520 PM	For all staff to message organization	nal	ossage to John F	lakor		
Maria Thorne			related messages.		essage to joint e			
Mario Coryell	C.	🛔 David Crouch		.4				
Mike Bruyere	Ľ		Туре					
Owen Crouch	Ľ		Public	~				
Permissions Te	est 🖸	What d'ya think of this?						
Peter Jacobs	C	David Crouch 04/03/2020 4:33:09 PM	Save		Click a Channe	l or Staff me	ember to sta	art a conversation.
Sebastian Rec	ice 🖸	David Crouch 04/05/2020 5:05:12 PM						
Support Agon	+ 7							

• Click the "Save" button to create the channel.

Luit Cha	nnel		× Close	
Channel Name	General			
	For all staff to m	nessage organizational r	elated messages.	
Description				
			.i.	
Status	Active		~	
Access	By Request		~	
Created By	Nick Rowan on 5/22/2	2020		
Requests to J	oin Channel			
Requests to Jo Member Name	oin Channel e Dept/Loc/Type	Date Requested		•
Requests to Jo Member Name David Crouch	oin Channel e Dept/Loc/Type Administration Washington, DC Staff	Date Requested	✓ Approve X Deny	
Requests to Ju Member Name David Crouch	oin Channel e Dept/Loc/Type Administration Washington, DC Staff	Date Requested	✓ Approve X Deny	
Requests to J Member Name David Crouch Channel Mem	oin Channel e Dept/Loc/Type Administration Washington, DC Staff	Date Requested	✓ Approve X Deny ★ Add Member	
Requests to Jr Member Name David Crouch Channel Mem Member Name	oin Channel e Dept/Loc/Type Administration Washington, DC Staff bers e Date Ad	Date Requested	✓ Approve X Deny ★ Add Member	
Requests to Jo Member Name David Crouch Channel Mem Member Name Nick Rowan	oin Channel Dept/Loc/Type Administration Washington, DC Staff bers Date Ad 5/22/2020	Date Requested 5/22/2020 Ided Added By 0 Nick Rowan	✓ Approve X Deny + Add Member X Delete	
Requests to Ju Member Name David Crouch Channel Mem Member Name Nick Rowan David Crouch	oin Channel Dept/Loc/Type Administration Washington, DC Staff bers Date Ad S/22/2020 5/22/2020 5/22/2020	Date Requested 5/22/2020 dded Added By 0 Nick Rowan 0 Nick Rowan	 ✓ Approve × Deny ★ Add Member × Delete × Delete 	

• Click the "Add Member" button.



- 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

		Messaging Center		Nick Rowan 🝳 🌻 🕩	
Channels	+	🖌 🎽 All Staff	Q X	🛔 John Baker	Q ×
All Staff	۵ 🗘	New channel. buch 04/10/2020 7:09:07 PM	^		Test text
Finance	🌣 🔒 🤅	Event: May 01, 2020	m		12:30:33 PM
Sales	🏟 🔒 🤅	Administration		Contact:	▲
Support	🌣 🗙 🖸	Pending Wednesday Happy Hour 4		Urganization	
Staff	Q	David Crouch 05/01/2020 2:04:05 PM			12:57:02 PM
David Crouch	n C	7 Event: May 19, 2020	#		
Dawn Sheehy	, 0	Communities Care Harriggements Harling Harrison Official DelDits			
Giovanny Bej	arano 🖸	Pending Support Meeting			
Jared Fergus	on 🖸	Maria Thome 05/19/2020 2:29:28 PM		V	
John Baker	C	Message to All Staff	4	Message to John Baker	
Maria Thorne	e C				
Mario Corvel		A David Crouch	α x		

• Click the "+" icon to the right of the "Channels" header on the top left of the screen.

	Messaging Center	Nick Rowan Q 🌣 🕞 🖄 🕅 Nick Rowan
Channels + All Staff Image: Comparison of the com	All Staff Thas Deen approved. Happy Easter everyone: Bend Greach Schoor 200 7 9847 FM Event: May 01, 2020 Administration Pending Wednesday Happy Hour 4 Event: May 19, 2020 Meeting we channel Name	Q X John Baker Q X Test text 123039 Pur Contact:
Giovanny BejaranoCJared FergusonCJohn BakerCMaria ThorneCMario CoryellC	Pending Support Meeting Maria Thome 05/15/2020 2:22:22 PM Message to All Staff Description For all staff to message or related messages.	organizational essage to John Baker
Mike BruyereC*Owen CrouchC*Permissions TestC*Peter JacobsC*Sebastian RecceC*Support AgentC*Test userC*	What d'ya think of this? Public David Creach 6403/2020 4.31:09 PM Private Lets not forget to get with Pht By Request David Creach 64/05/2020 5.06:00 PM Public Test David Creach 64/05/2020 5.06:00 PM	Click a Channel or Staff member to start a conversation.

- 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.

	Org	Messaging Cente	er	Nick F	Rowan Q	\$ 🕞	
Channels	+	😁 All Staff	Q x	🔺 jo	ohn Baker		Q ×
All Staff	• 🖍	David Crouch 04/10/2020 7:09:07 PM	Easter everyone!				Test text
Finance		Event: May 01, 2020	#				12:30:33 PM
Sales Support	\$ × €	Pending Wadasday Happy Hayr 4			Contact:		*
Staff	٩	David Crouch 05/01/2020 2:04:05 PM	Create New Chappel	2	x		12:57:02 PM
David Crouch	C	Event: May 19, 2020	create New Channel				
Dawn Sheehy	C.	Germanica Can Harage was A	New Channel Name				
Giovanny Beja	rano 🖸	Pending Support Meeting	General				
Jared Ferguso	n 🕑	Maria Thorne 05/19/2020 2:29:28 PM	Description				~
John Baker	2	♥ Message to All Staff	For all staff to message organization related messages.	nal	essage to John Baker		4
Mario Coryell	C	🛔 David Crouch		.4			
Mike Bruyere	C		Туре				
Owen Crouch	C		Public	~			
Permissions Te	st 🖸	What d'ya think of this?					
Peter Jacobs	C	David Crouch 04/03/2020 4:33:09 PM	Save		Click a Channel or S	Staff member to st	tart a conversation.
Sebastian Rec		David Crouch 04/05/2020 5:05:12 PM					

• Click the "Save" button to create the channel.

Requesting access to a channel

	ontent Settings Logout Help Change Password	Select Language	Nick Rowan Friday, May 22, 2020
Recent Activity	This Week	€ All Staff Notices	Staff irectory
Carriere Marilleti 🔺 🔺	Friday, May 22 📓 From Office (Home)	Date/Time Name Type From	My Availability
Contain-		● 05/25/2020 Vacation/Holiday	View Details
✓ Open 🕹 Upload	9:00 AM - 9:00 AM	B 96/06/2020 Administration	
Search Contacts	Monday, May 25 Office (Home)		Name V Sort
Find	H 11:00 AM - 12:00 PM Meeting	€ 9:30:00 AM	#Theory and
Advanced Search	Tuesday, May 2(Office (Home) 11:00 AM - 12:00 Training	B 9:30:00 AM	 Construction Construction Construction
Recent Contacts	Wednesday, Maj	06/26/2020	Contractory Contractory
Rectant Series Topics	E 1:00 PM - 2:00 Training	9:30:00 AM	 Construction Construction
his hare.	A Reminders	Follow-Up Notifications	Therman
Intellig Support	Date/Time Contact Type	Date/Time Contact Type	 The pair of an
Network Residence	05/12/2020 NewOrg	01/28/2020 hternal	 Protocol Long

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

		Messaging Center	Dav	vid Cr	rouch Q	⇔	
Channels	+	💄 Nick Rowan	Q x	🔮 Priv	vate setting chanr	nel	Q *
All Staff 🛛 🔅	2	Nick Rowan 05/13/2020 10:32:45 AM	•			~	^
Random 🌣	2	Event: May 21, 2020		v	1		
Development 🗙	2	Consulting Nichole Kraft Admin, Baby TALK, Inc.		x			
Private 🖸 🌣 setting		Pending 1 pm Central: Going over the 2 repor	Request Access to Channel:		1:32:31 PM		
channel 🌣	×	Nick Rowan 05/21/2020 2:01:01 PM	test				
Finance 🔅 🗙	2	Contact Form Viewed: Contact Sum					
General 🔅 🗴	2	Tiffani Bibb	Populart Assass				
Sales 🔅 🗙	2	Nick Rowan 12:13:40 PM	Request Access				
Support 🔅 🗙	2	Written message example	7				
test 🙆	0						-
		🗞 Message to Nick Rowan			essage to Private s	etting channel	1
Staff	a 🔪	Pandom	Q X				
Dawn Sheehy	Z						
Giovanny Bejarano	C.						

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

	Messaging Center		Nick Rowan 🝳 🌻 🕩	
Channels +	😤 All Staff	Q X	🛔 John Baker	Q ×
All Staff 🛛 🗘 🗹	nas been approved. Happy Easter everyone! David Crouch 04/10/2020 7:09:07 PM	^	*	^
Random 🌼 🕑	Event: May 01, 2020	-	~	
Private setting 🛛 🖓 channel 🌣 🗙	Administration			Test text 1230:33 PM
Finance 🔹 🖉 🥥	Wednesday Happy Hour 4		Contact: Illium Buu	4
General 🔞 🗴 🗹	David Crouch 05/01/2020 2:04/05 PM		Organization	
Sales Ø	Event: May 19, 2020 Meeting Pending Support Meeting			12:57:02 PM
Support 🗘 🗙 🗹	Maria Thome 05/19/2020 2:29:28 PM	~		
Staff q	S Message to All Staff	4	S Message to John Baker	4
David Crouch	🛔 David Crouch	Q 🗙	😤 General	Q x
Dawn Sheehy		Cheers ^	*	^
Giovanny Bejarano 🖸 Jared Ferguson 🖸	Event: May 21, 2020 Consulting			Test message

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

Edit Cha	nnel		× Close	
Channel Name	General			
	For all staff to me	ssage organizational	related messages.	\
Description			.1	\backslash
Status	Active		~	
Access	By Request	•	~	
Created By	NICK ROWAII OII 5722720	Save		
Requests to Jo	e Dept/Loc/Type	Date Requested		· ∖
David Crouch	Administration Washington, DC Staff	5/22/2020	✓ Approve × Deny	2
Channel Mem	bers		+ Add Member	
Member Name	e Date Ado	led 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 "Class" button at the tag of the second.

2) Click the "Close" button at the top of the screen.



Removing yourself or another user from a channel

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

	Messaging Center		Nick Rowan 🝳 🌻 🕞	
Channels +	쑬 All Staff	Q X	🋔 John Baker	Q x
All Staff 🛛 🌣 🖒	David Crouch 04/10/2020 7:09:07 PM	^	*	^
Random 🌼 🗗	Fund May 01 2020	-	^	
Private setting 🛛 🖒 channel 🌣 🗙	Administration Pending			Test text 123033 PM
Finance 🔅 👔	Wednesday Happy Hour 4		Contact: Illium Brou	
General 🔞 🗴 🗹	David Crouch 05/01/2020 2:04:05 PM		Organization	
Sales Ø	Event: May 19, 2020 Meeting Pending Support Meeting			12:57:02 PM
Support 🔅 🗙 🗹	Maria Thorne 05/19/2020 2:29:28 PM			0
Staff ୍	Nessage to All Staff	1	Nessage to John Baker	1
David Crouch	🛔 David Crouch	Q 🗙	😤 General	Q X
Dawn Sheehy	05	Cheers ^	*	^
Giovanny Bejarano 🖸 Jared Ferguson 🗗	Event: May 21, 2020 Consulting	8		Test message

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

Edit Cha	nnel		× Close	
Channel Name	General			
	For all staff to me	essage organizational re	elated messages.	
Description				
Status	Active		~	
Access	By Request		~	
Created By	Nick Rowan on 5/22/20)20		
Requests to J	oin Channel			
Member Name	e Dept/Loc/Type	Date Requested		\
David Crouch	Administration Washington, DC Staff	5/22/2020	✓ Approve X Deny	
				2
Channel Mem	ibers		+ Add Member	//
Member Name	e Date Adde	ed 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



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



 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.



• 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.



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



• 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

Event Edit	Standard Summary 🗸 🎒 Print	🛍 History 🥫	Outlook	Event Details	Files Advanced
Event:		/			Create Recurrence
Att Complete the	partie the Center Separts				
Contact:	Edit		Type:		~
Date: 05/22/2020 🖃 (mm/dd/yyyy)	Start Time: 9 V 00 V AM	End Time:	00 ~ AM ~	Minutes: 0 😥	Remind me: <mark>0</mark> days before this event.
Description:	upy the QC - Complance Rep e the Organizational Reports		Assigned To: Nick Rowan		▼ More Staff

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

	rg	Messaging Cente	r	Nick Ro	owan Q	, 🍄 (
Channels	+	😁 All Staff	Q x	🛔 John	Baker		Q ×
All Staff	• 2	nas been approved. Happy E David Crouch 04/10/2020 7:09:07 PM	aster everyone!		-	~	^
Random	۵ نې	Events May 01, 2020		х		~	
Private setting channel	¢ ×	Administration Lynn Overmann (40007) Pending	Event: May 22, 2020 Support Ticket	#			Test text 12-30-33 PM
Finance	• • 0	W 1 Eday Happy Hour 4	Complete Add Compliance Report in the Center Re	ports	tact: Tiffani Bibb		A
General	• × 🗹	David Crouch 05/01/2020 2:0:05 PM			E Center for Girls anization		
Sales ⊘ 🏝		Event: May 19, 2020 Meeting Connections Case Management: A Pending Support Meeting	Send To: All Staff				2:57:02 PM
Support	• × 🖻	Maria Thorne 05/19/2020 2:29:28 PM	History:				~
Staff	Q	Message to All Staff		<u>^</u>	essage to John B	aker	1
David Crouch	C	🛔 David Crouch	No messages found.	2	ral		Q x
Dawn Sheehy	C					~	^
Giovanny Bejara	10 🖸	Event May 24, 2020				~ ~	
Jared Ferguson	p C	Consulting					Test message
John Baker	C	Pending					Test message
Maria Thorne	C	1 pm Central: Going over the 2 re					1:30:36 PM
Mario Coryell	C				essage receipt		
Mike Bruyere	C	Contact Form Viewed: Contact S			u read me nov	v?	
Owen Crouch	C		1040-00	Jareg Perg	u on 1:48:39 PM		

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



• 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.

	Messaging Center	David Crouch Q 🌣 🕞 🖄 NewOrg
Channels	•	
All Staff 🛛 🗘	3	
Development 🗙	3	
Finance 🗗 🌣	Click a Channel or Staff member to start a conversation.	Click a Channel or Staff member to start a conversation.
Sales 🔅 🗙	3	
Support 🦻 🌩 🗴	2	
Staff		
Dawn Sheehy	c'	
Giovanny Bejarano		
Jared Ferguson	3	
John Baker	2	
Maria Thorne		
Mario Coryell		
Mike Bruyere	2	
Nick Rowan 🗩		
Owen Crouch	Click a Channel or Staff member to start a conversation.	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.



• 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

	g	Messaging Center		N	lick Ro	owan Q		
Channels	+	😁 All Staff	Q	×	🛔 John	Baker	1	Q x
All Staff	• 🖻	nas been approved. Happy Ea David Crouch 04/10/2020 7:09:07 PM	ister everyone:	^			\$	^
Random	• 🕑	Event: May 01 2020	en				r	
Private setting channel 🏾 🌣	×	Administration	89 					Test text 12:30:33 PM
Finance 🔅		Wednesday Happy Hour 4			×	tact:		
General 🔅	× 🖻	David Crouch 05/01/2020 2:04:05 PM				E Cen anization	ò	
Sales 🥥 🍑		Event: May 19, 2020 Meeting Pending Support Meeting	Send Alerts	;5		2		12:57:02 PM
Support 🔅	×C	Maria Thorne 05/19/2020 2:29:28 PM	Email ~					~
Staff	Q	S Message to All Staff	Save		3	essage to John Baker		
David Crouch	C.	David Crouch	N			ral		Q ×
Dawn Sheehy	C.						~	^
Giovanny Bejarano		Event: May 21, 2020						
Jared Ferguson 💶		Consulting						Test message
John Baker	C.	Pending				1		Test message
Maria Thorne	C.	i pm Central: Going over the 2 rep	iorts					1:30:36 PM
Mario Coryell	C		05/21/2020 2:01:01	PM	Jared Ferge	Aessage receipt uson 1:48:24 PM		

- 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.

		Messaging Center	ť	Nick Ro	wan Q	۰ ک	
Channels	+	 All Staff Blockstoceoustoproveoustopovez 	Q ×	John	Baker		Q x
All Staff	• 2	David Crouch 04/10/2020 7:09:07 PM				~	
Random	• 2	Event: May 01, 2020					
Private setting channel	×	Administration Pending	-				Test text 12:30:33 PM
Finance H		Wednesday Happy Hour 4	Search Messages	x	tact:		A
General 🕻	×C	David Crouch 05/01/2020 2:04:05 PM	Staff/Channel:		anization		
Sales Ø		Event: May 19, 2020 Meeting Pending Support Meeting	Enter search terms here When searching you can use operators to refine your characters can be used - for NOT, & for AND, space fo for multi-word phrases.	search. The following OR, and "some text"			12:57:02 PM
Support 📢	×C	Maria Thorne 05/19/2020 19:28 PM		<u></u>			
Staff	Q	& Met 2 to All Staff	Sing Center Nick Rowan Nick Rowan Nick Rowan Nick Rowan Proved: Pappy Hour 4 Search Messages Staff/Channel: All Proved: Search Messages Staff/Channel: All For search terms here Wen searching you can use operators to refine your search. The following for and some use: No All Staff No All Staff				
David Crouch	C.	🛔 David Crouch			ral		Q x
Dawn Sheehy	ď					*	
Giovanny Bejaran	10 C	Event: May 21, 2020					
Jared Ferguson	• 2	Consulting					Test message
John Baker	C.	Pending					Test message
Maria Thorne	C.	i pri centrali doing over the 2 re					1:30:36 PM
Mario Coryell	C.				essage receipt		
Mike Bruvere	57	Contact Form Viewed: Contact S	ummary		n radiae rol		

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.