

Custom Messages

Custom Messages allow a site administrator to send a custom email message through the site to other site members, catalog administrators and site members.

Topics:

How do I locate custom messages?

How do I manage existing messages?

How do I create a new custom messages?

How do I choose who receives custom messages?

What additional filters can I apply to a custom message?

How do I schedule a custom messages?

Can I see a preview of my message before saving it?

Can I send a test email?

Custom Messages

Location

Manage

Step 1

Step 2

Step 3

Step 4

Custom Messages

Custom Messages allow a site administrator to send out custom-crafted messages through the site to other site members, catalog administrators and site members.

The screenshot displays the ConveyChannel website interface. At the top, the ConveyChannel logo is visible. Below the logo, there is a 'Featured' section with a card for 'Convey Classroom'. The card includes a thumbnail image of a person's head with gears and a blue 'X' icon, the title 'Convey Classroom', a brief description: 'Welcome to the Convey Classroom . We use this catalog to hold our training videos and user guides that will help you learn how to set up and manage your content catalog, post ...', and a 'View' button. Below the 'Featured' section is a 'Trending Now' section with two cards. The first card is for 'How Can School Districts Prepare Kids for Tomorrows World', featuring a thumbnail of a document, the title, a description: 'The goal of the educational system should be to prepare its students for tomorrow's adulthood. This has been the recurring theme throughout today's educational reform ...', and a 'View' button. The second card is for 'Carrier and Technology Agnostic Services', featuring a thumbnail of a document with the NetWolves logo, the title, a description: 'Listing of technology solutions perfected by NetWolves such as interconnectivity and security.', and a 'View' button.

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Location

Manage

Step 1

Step 2

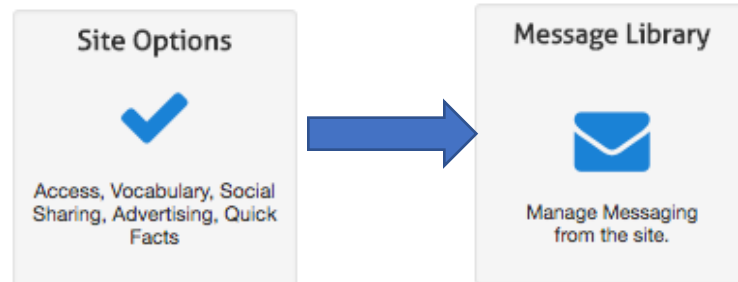
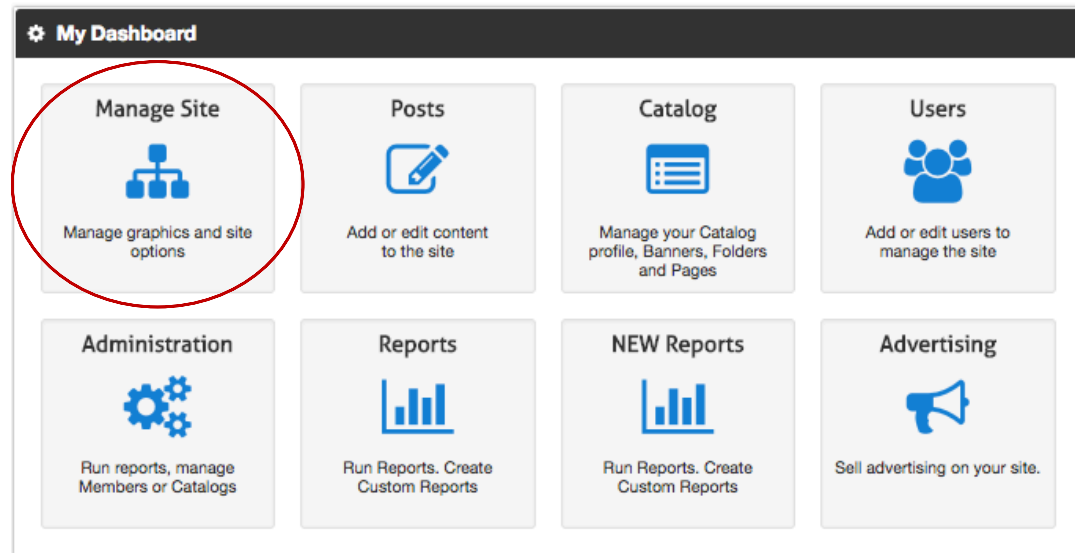
Step 3

Step 4

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How do I locate custom messages?

From your Dashboard, select Manage Site, then select Site Options and then Message Library



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Manage

Step 1

Step 2

Step 3

Step 4

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How do I manage existing custom messages?

Select Manage Custom Messages from the left-side navigation. Any existing message will appear to be edited or deleted.

Name	Updated	Action
Example	2017-04-06 08:22:56 Brent Palmer	Delete
Convey Campaign Broadcast Email	2017-04-06 08:21:40 Brent Palmer	Delete
Site Notification	2017-04-06 08:22:38 Brent Palmer	Delete
Deal Reminder	2017-05-15 11:07:34 Carolyn Bradfield	Delete
Tips and Hints - Test Message	2017-05-12 10:50:46 Carolyn Bradfield	Delete
Cocktails & Conversations 2	2017-06-13 12:45:31 Carolyn Bradfield	Delete
RCN Case Study	2017-06-20 11:24:08 Brent Palmer	Delete



Please note that built in Site Messages cannot be deleted, but can be turned off or edited. This is covered in a separate training document.

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Location

Manage

Step 1

Step 2

Step 3

Step 4

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How do I create a new custom messages?

After selecting either Add Custom Message from the Dashboard, fill out the required information in Step 1: Name and Description, from email, email subject line, header and contact information in the footer.

You can also switch to the default header & footer which will automatically populate these sections with information you have established in the Header & Footer set up process.

Edit Custom Message

Step 1 Options, Header & Footer (required) | Step 2 Message (required) | Step 3 Recipients (required) | Step 4 Review & Schedule (required)

Select options and add a header & footer to the message.

Message Status: Draft [Change Status](#)

Select Options

Name and Description: Example | Optional Description

Select From Email: support@conveyservices.com

Enter Email Subject: Enter the subject

Select Background Color: Select Color (optional). Color will appear behind the entire email

Add a Message Header & Footer

- Use the default header & footer
- Add a new header & footer file
- Add the site logo to header

Upload a JPEG, JPG, or PNG file that is 3 MB or less and 600 pixels wide [+ Select file](#) [Upload](#)

Add a header link: http://sitename.com

Add a Footer

Contact & Company: Convey Services | Convey Services

Email Address: rbradfield@conveyservices.com

*Address: 28 Sloan St. | Address 2

*City, State & Zip: Roswell | GA | 30076

LinkedIn: https://www.linkedin.com/

Facebook: https://www.facebook.com/

Twitter: https://twitter.com/

[Cancel](#) [Save](#) [Next](#)

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Manage

Step 1

Step 2

Step 3

Step 4

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In Step 2, customize your message. Use the editor to insert text, graphics, or hyperlinks. Add in custom fields such as First Name or Last Name by clicking the Add Field button. Preview the email or send a test email to a specific email address by clicking the Send Test Email button.

The screenshot shows the 'Edit Custom Message' interface. At the top, there are four steps: Step 1 (Options, Header & Footer), Step 2 (Message), Step 3 (Recipients), and Step 4 (Review & Schedule). Step 2 is highlighted in green. Below the steps, there is a text input field with the placeholder 'Enter text and graphics to create your message and insert first name, last name or both if needed'. Below this is a 'Message' section with an 'Add Field (Optional)' button. Below the 'Add Field' button is a rich text editor with a toolbar and the text 'This is an example of a custom message'. At the bottom, there are buttons for 'Preview Email', 'Send Test Email', 'Cancel', 'Back', 'Save', and 'Next'. The 'Preview Email' and 'Send Test Email' buttons are circled in red.

The screenshot shows the 'Insert Recipients' dialog box. It has a title bar with a close button. Below the title bar, there is a section for 'Send Test Email To:' with the instruction 'Comma separate email addresses to send to multiple recipients'. There is a text input field labeled 'Enter Email Addresses'. At the bottom right, there are 'Close' and 'Send' buttons.

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Step 3

Step 4

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How do I choose who receives a newsletter?

In Step 3, select site administrators, catalog administrators, members or contacts to receive the newsletter. Selecting members will allow you to specify specific member types.

What additional filters are available to narrow the recipient list?

The system can deliver the message to members or users who have not logged in or posted content within a specified timeframe. Click the Add New Filter button to add additional filters from fields in administration.

Edit Custom Message

Step 1 Options, Header & Footer (required)

Step 2 Message (required)

Step 3 Recipients (required)

Step 4 Review & Schedule (required)

Select Recipient Groups (Required)

Select Contacts, Administrators or Members along with specific member types to receive this newsletter. Or select one or more reports from the report library for recipients.

Recipients

Select Recipient Groups

Select Recipient from Reports

Select recipient groups

Site Administrators

Catalog Administrators

Members

Contacts

Add Filters (Optional)

Select the last login and/or last post date as an optional filter. Narrow the recipients by adding additional filters. Select "and" so that data from all filters is matched. Select "or" so that data from any filter is added.

Last Login Date

Last Post Date

Match type And Or

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Can I see a preview of my message before saving it?

In Step 2 or 4 of the Wizard, click the Preview button to see a preview of what your message will look like before saving your message. Look at the options you have selected and if you need to make changes, go back to a previous step in the Wizard.

Edit Custom Message

Step 1 Options, Header & Footer (required) Step 2 Message (required) Step 3 Recipients (required) **Step 4 Review & Schedule (required)**

Confirm the options and save. Click to preview the message.

Option	Description		
Name & Description	Status	Name	Description
	Off	Example	
From	support@conveyservices.com		
Subject			
Site Logo	On	Header	None
Recipient Groups	Site Administrators		
Site Fields			
CRM Fields			
Recipients	14		

Sending Options

Save the message as a draft, send it now, or schedule it. Set the delivery frequency for a scheduled email.

Save as Draft
 Send Once
 New Recurring Schedule

Preview Email Send Test Email Cancel Back Save

Can I get a test message delivered?

In Step 2 or 4, click the send test email button to deliver a test email to one or more individuals.

What are the available delivery options?

All messages are saved as a draft. Choose the frequency that the email is sent out such as daily, weekly, monthly or one-time. Schedule the message by selecting a start date and optional end date. Add a time range the message should go out.