
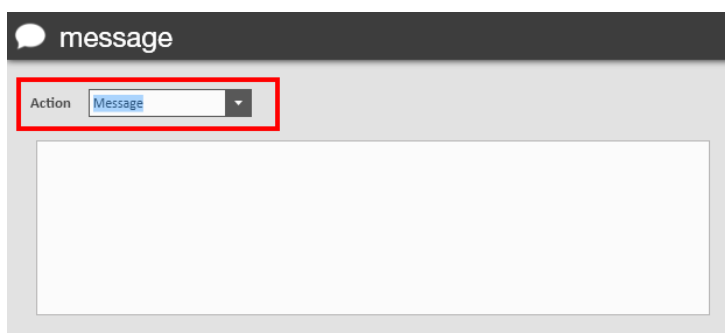


Core - Creating Message Action Codes

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What are Message Action Codes?

In Core, you can log messages  on different records to document conversations, record changes, and additional information. Each message is accompanied by a message action code which categorizes the message type. These message action codes are searchable and reportable, making them a valuable resource to keep track of work being done.



In order for you to utilize a message action code, it must first be created in administration.

How to Create Message Action Codes in Administration

Navigate to administration > message and select the + icon to add a new message action code.

The screenshot shows the 'Administration' interface with the 'message' configuration page. The left sidebar lists various categories, with 'message' highlighted. The main area displays '46 items available' and is split into two sections: 'Main Message Info' and 'Read-Only Defaults'. The 'Main Message Info' section contains several input fields and checkboxes, including 'Action' (1st Interview w/ client), 'Description' (1st Interview with client), and various status checkboxes like 'Active', 'Is React', and 'Is Deact'. The 'Read-Only Defaults' section contains five checkboxes for default settings: 'Is Default', 'Is Default Deact Code', 'Is Default React Code', 'Is Default Email Code', and 'Is Default LMTC'.

Fill out the following information:

1. Action

- This will be the displayed title of the message action code and should be short and concise.

2. Optionally, enter a description

- This should include the purpose of this message action code for users.

3. Select Hier:

- Hier stands for Hierarchy.
- Select what level of hierarchy this message action code applies to.
 - Ex- If it applies to all branches, select Entity.

4. Check box options:

- Active: Make sure the active checkbox is checked. This denotes that the message can currently be selected.
- Is React: If selected, the message action code will reactivate the record it is logged on.
- Is Deact: If selected, the message action code will deactivate the record it is logged on.
- Is Employee Relevant: Can use this message action code on an Employee

record.

- Is Contact Relevant: Can use this message action code on a Contact record.
- Is Customer Relevant: Can use this message action code on a Customer record.
- Is DNA: If selected, this message will also mark the employee as 'Do Not Assign.'
- Is Availability: Will mark the message logged as a reference to availability information (for searching).

Some Message Action codes come with the system and will have the locked checkbox selected. These codes have additional functionality in the system and can not be removed.

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