

CoActiveSoft Messaging Application

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CoActiveSoft Messaging looks similar to an email programs, yet there are a few important distinctions:

- Users can send and receive CoActiveSoft messages from CoActiveSoft Messaging
- CoActiveSoft Messaging works with CoActiveSoft profile application, taking advantage of existing profile information
- Users can send but not receive responses when using CoActiveSoft Messaging for emails and text messages

Access CoActiveSoft Messaging

After the user clicks on Messaging on the main menu, CoActiveSoft displays the inbox of CoActiveSoft Messaging:

CoActiveSoft

Logout

My Profile

Messaging

Inbox 8

Sent

Drafts

Profiles

Scheduling

Messaging / Messages

Messages - Inbox

Refresh Mark unread Delete Compose

All categories Profile Search

Correspondents	Message	Date
<input type="checkbox"/> Home Care Agency	CNA License expired on Tue 6/12/18 - Your CNA License credential expired on Tue 6/12/18 in the CoActiveSoft system for Home C...	12:00 AM
<input type="checkbox"/> Home Care Agency	CPR Card expired on Tue 4/17/18 - Your CPR Card credential expired on Tue 4/17/18 in the CoActiveSoft system for Home Care A...	4/17/18
<input type="checkbox"/> Home Care Agency	CNA License expired on Wed 4/4/18 - Your CNA License credential expired on Wed 4/4/18 in the CoActiveSoft system for Home C...	4/4/18
<input type="checkbox"/> Home Care Agency	Service request 000030 Requested - General service request 000030 state is now Requested. please change XYZ	3/26/18
<input type="checkbox"/> Home Care Agency	CPR Card expired on Wed 3/14/18 - Your CPR Card credential expired on Wed 3/14/18 in the CoActiveSoft system for Home Care ...	3/14/18
<input type="checkbox"/> Home Care Agency	CPR Card expired on Mon 2/19/18 - Your CPR Card credential expired on Mon 2/19/18 in the CoActiveSoft system for Home Care ...	2/19/18
<input type="checkbox"/> Home Care Agency	CNA License expired on Wed 1/31/18 - Your CNA License credential expired on Wed 1/31/18 in the CoActiveSoft system for Home...	1/31/18
<input type="checkbox"/> Home Care Agency	CNA License expired on Fri 12/1/17 - Your CNA License credential expired on Fri 12/1/17 in the CoActiveSoft system for Home Ca...	12/1/17

CoActiveSoft Messaging Inbox

1 – Search boxes



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- > 2115 SW 152nd Street, Seattle WA 98166

The search boxes in CoActiveSoft Messaging allow users to filter messages by message category, profile, or by text contained in the message
Upon request, new categories can be created for your business. To do so, please contact CoActiveSoft support.

2 – Messaging Menu

The Messaging Menu provides the functionality any user is familiar with from common email applications.

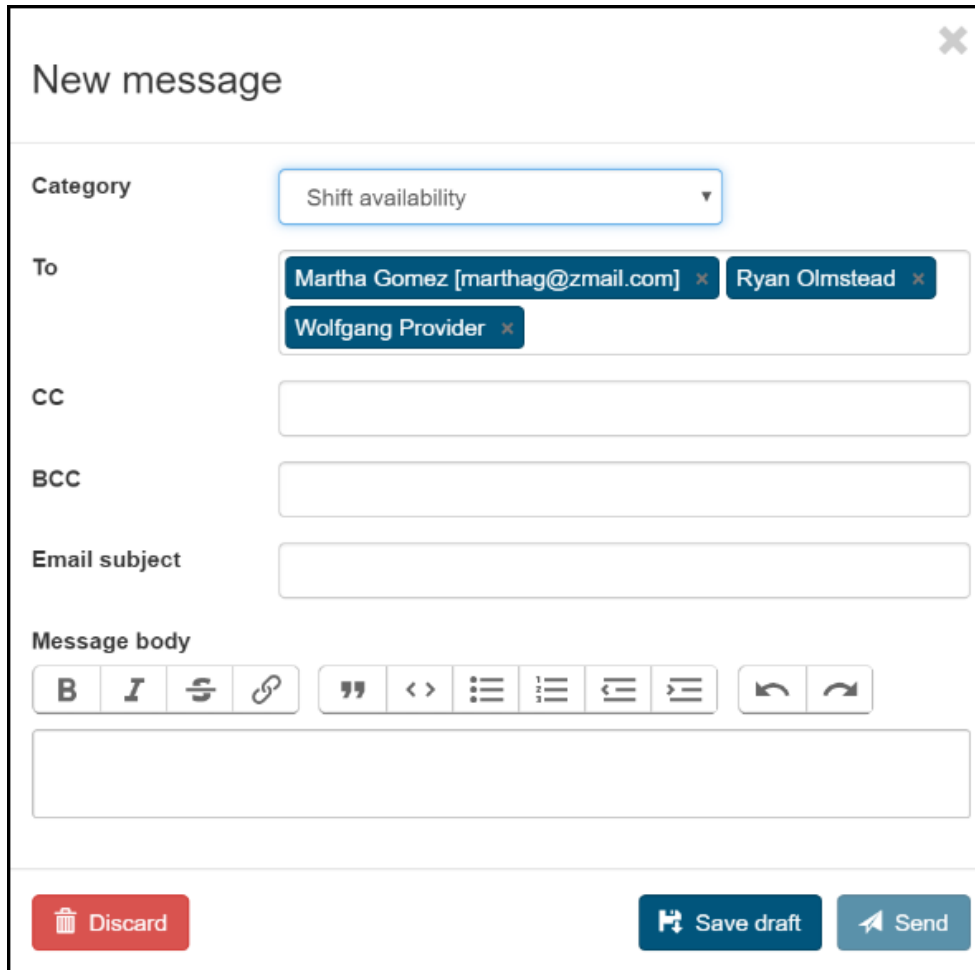
Sending a Message

Clicking on the Compose button (3) opens a message dialog window which, once again, looks familiar from most email applications. The one important difference is the Category menu item. Depending on the user's choice, CoActiveSoft Messaging reacts differently:



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New message

Category: Shift availability

To: Martha Gomez [marthag@zmail.com], Ryan Olmstead, Wolfgang Provider

CC:

BCC:

Email subject:

Message body

Rich text editor toolbar: Bold, Italic, Strikethrough, Link, Quote, Code, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo

Buttons: Discard, Save draft, Send

In the above example, the agent selected Shift Availability from the Category drop down, and CoActiveSoft Messaging automatically puts all users who are set up to receive shift availability messages in the To line:

1. General
This item is selected by default and is identical to the common email process.
2. Marketing
If this item is selected, the To line will automatically display all users who are set up to receive marketing messages (see the Messaging Subscription section of the [CoActiveSoft Profile Management](#) user manual)
3. Message Subscription



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Similar to Marketing, CoActiveSoft Messaging displays the users who are set up accordingly in their profile to receive Message Subscription messages.

New message

Category

To

- 1 Ryan Olmstead x
- Ryan Test User [ryan.olmstead@coactivesoft.com] x 2
- 3 Ryan Olmstead [(206) 248 1884] x |

CC

BCC

Interpreting the recipient list:

Recipients with just a profile name will receive a CoActiveSoft internal message (1).
Recipients with a name and email address will receive the message as an email (2).
Recipients with a name and phone number will receive the message as a text (3).

Some additional considerations:

- Usage of the messaging application for users other than agents is limited. Providers, patients and clients can message the agent only, either by initiating a message or by responding to a message they received from the agent.
- Whether the recipient receives the message as email, text or CoActiveSoft Message depends on the set up in his/her profile. (see Messaging Subscription part of the User Profile – Edit View for details)



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