Inner Office Messaging Add

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To create a new Inner Office Message, follow the instructions below.
1. Open the Customer Explorer record for which a new Message will be created. Highlight the Inner Office Message option on the customer tree; right-click and select the New Message option.

2. The New Inner Office Message form will be displayed. The User must make selections in all required fields to be able to save the Message. Data entry fields on this form will be described on the next page.

Inner-Office Message Fields
To – Select the User from the drop-down list that will be assigned to the new Message. This is a required field.
Status – The default status is set to New; the User may select a different Status from the drop-down list. This is a required field.
Priority – Make a selection from the drop-down list which indicates the urgency of the Message. This is a required field.
Message - Enter information in the white text box area then click the Add Message button to save the information. All messages added to the Inner Office Message automatically record the User name entering the note along with the date and time the message was saved. This is a required field.
3. When finished filling out the form, click the Save button located at the lower right of the New Inner Office Message form.