

Tech Tip Tuesday—April 22, 2014

by David Hirsch

Messages in Contact Profile

So now that we've talked about so many note fields, and what they can be used for and how they are different, are you ready for one more?

In the contact profile, there may be the need to add a "note" to a profile that you don't normally need to see, or need in a trip, but rather something that you might need to refer to later about that contact. Sort of like an "Agent Note" about a contact, such as when you gave the contact a free trip, or a special one-time discount, etc.

If you look at the contact profile, you might have noticed that there is a Messages tab.



If you click on that tab, there is a large white box in which you can type a message.



Once you type the message and click on Save, then the message is saved in that contact for future reference, along with the id of whomever entered it, and a time/date stamp.

If you click on the message in the left box, you will see the contents of the message in the white box. Whenever there is at least one message for a contact, there will be an explanation mark (!) after the word "Messages" telling you there is at least one message.



Some important points to remember about messages: Unlike Agent Notes in a trip, Messages can be altered or deleted. If you alter a message, the Log DateTime does not change (this behavior will be changed in a future release). Also the adding, changing, or deleting of messages in a contact does not currently generate an event log entry (this will also change in a future release).