

Messaging a User

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From the Users area of the system, click the radio button (or select all at the top) next to the participant's name you want to message.

The screenshot shows the QualBoard interface with the 'Users' tab selected. A list of participants is displayed with columns for Display Name, Email Address, Last Login, Total Completion %, Posts (Last 24 Hrs), Answered Followups, and Group Tags. A pink arrow points to the radio button next to the user 'Amanda'.

DISPLAY NAME	EMAIL ADDRESS	LAST LOGIN	TOTAL COMPLETION %	POSTS (LAST 24 HRS)	ANSWERED FOLLOWUPS	GROUP TAGS
Amanda	olivia.banks+participant4@2020research.c	3 weeks ago	6%	0	0 / 0	0
Andrew A.	m.andrew.albright@gmail.com	10 months ago	No Agreement	0	0 / 0	0
David R	jarroda+1@2020research.com	10 months ago	No Agreement	0	0 / 0	0
Demo Participant	olivia.banks+helpdocs@2020research.com	3 weeks ago	9%	0	0 / 0	1
John	olivia.banks+extra@2020research.com	3 weeks ago	41%	0	0 / 0	1
jperk	perkinsj1@gmail.com	7 months ago	No Agreement	0	0 / 0	0
Kelly	olivia.banks+participant1@2020research.c	3 weeks ago	41%	0	0 / 0	1
Olivia	olivia.banks+newparticipant@2020researc	3 weeks ago	62%	0	0 / 1	1
Olivia B	olivia.banks+1@2020research.com	3 weeks ago	6%	0	0 / 0	0
Parker B	olivia.banks+participant@2020research.c	3 weeks ago	6%	0	0 / 0	0
Sam G	olivia.banks+participant2@2020research.c	3 weeks ago	6%	0	0 / 0	0
Tyler	olivia.banks+participant3@2020research.c	3 weeks ago	6%	0	0 / 0	0

You're well on your way! Click **Next** for the next step.

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Click the email button in the slide out panel on the right hand side to open the messaging window.

The screenshot shows the QualBoard interface with the 'Users' tab selected. A list of participants is displayed. A pink arrow points to the 'Email' button in the slide out panel on the right side of the user list.

DISPLAY NAME	EMAIL ADDRESS	LAST LOGIN	TOTAL COMPLETION %	POSTS (LAST 24 HRS)	ANSWERED FOLLOWUPS	GROUP TAGS
Amanda	olivia.banks+participant4@2020research.c	3 weeks ago	6%	0	0 / 0	0
Andrew A.	m.andrew.albright@gmail.com	10 months ago	No Agreement	0	0 / 0	0
David R	jarroda+1@2020research.com	10 months ago	No Agreement	0	0 / 0	0
Demo Participant	olivia.banks+helpdocs@2020research.com	3 weeks ago	9%	0	0 / 0	1
John	olivia.banks+extra@2020research.com	3 weeks ago	41%	0	0 / 0	1
jperk	perkinsj1@gmail.com	7 months ago	No Agreement	0	0 / 0	0
Kelly	olivia.banks+participant1@2020research.c	3 weeks ago	41%	0	0 / 0	1
Olivia	olivia.banks+newparticipant@2020researc	3 weeks ago	62%	0	0 / 1	1

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To change who the message sender is displayed as in the recipient's email, click the drop down in the From row. This will always default to whoever is set as the moderator for the activity. You then will fill out a Subject line for your message as well.

New Message

From: QualBoard

To: Olivia

Subject:

Template: Choose a template

Write Preview

Type something

☒ Append Login Instructions
☐ Send email in the future

Cancel Send

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To choose a template, such as login instructions, click the drop down in the Template row and select your preference. You are not able to edit system template emails. **NOTE:** In the templates, you will notice values in between ### symbols. These are automatically populated by the system and do not need to be edited.

New Message

From: QualBoard

To: olivia b

Subject:

Template: Choose a template

Project Participant Added

Moderator Added

Observer Added

(None)

Write Preview

Type something

☒ Append Login Instructions
☐ Send email in the future

Cancel Send

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If you want to append login instructions to your user, make sure the check box at the bottom left is checked. When you are done with your message, just click the **Send** button and your message will be on its way!

New Message

From: QualBoard

To: olivia b

Subject:

Template: Project Participant Added

Write

Preview

Normal

Hello ###name###,

You have been invited to join the ###project-name### project starting on ###project-start-date### and ending on ###project-end-date###

- ☒ Append Login Instructions
- ☐ Send email in the future

Cancel

Send

Back

Next