Counter Message

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Creating a Message

Creating a message in the Counter Message system is straight forward. In order to create a new message, you need two pieces of information: an email address to send the message too, and a message to send. Optionally you can provide a customer account number to tie the message to a specific customer and have it show up in their CounterCRM module.

Customer ID

This is the optional value you need to input to tie a message to a specific customer. Typically this number is a 6 digit value, and can be found from a customer's CounterCRM page, or the drilldown page on your FlightDeck Dashboard.

Alternatively, visiting a CounterCRM dashboard and navigating to the Recent Messages tab of the Recent Activity panel, you can use the "New Message" link in the top right corner of the panel to be brought to the New Message page with the customer's ID already filled out.

To

The To: field is the same as it is for a standard email. To send a message to multiple email addresses, separate them with a semicolon (;) like so:

alice@company.com; bob@company.com; charles@company.com

Alternatively, your administrator has the option of populating an address book with predefined names and email addresses for your convenience. By clicking the "Show Address Book" option you can select rows from the table displayed and add them to your message.

Message

This is where the content of your message goes. This is the same as writing the body of an email, where whatever information or request you're sending needs to go.
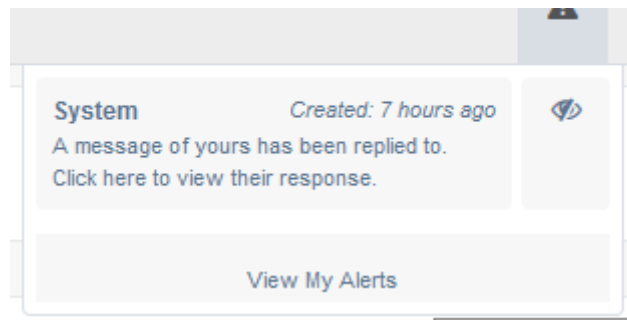
Response Alert

When somebody replies to a message you have sent, a system alert is generated within the Counterpoint Cloud Platform. From the alert you can view the message and see who responded, and the message they sent back.

Receiving a Message

Email

When a message has been sent to you, you'll receive a generated email with a link to view the message on the counterpoint.cloud website.
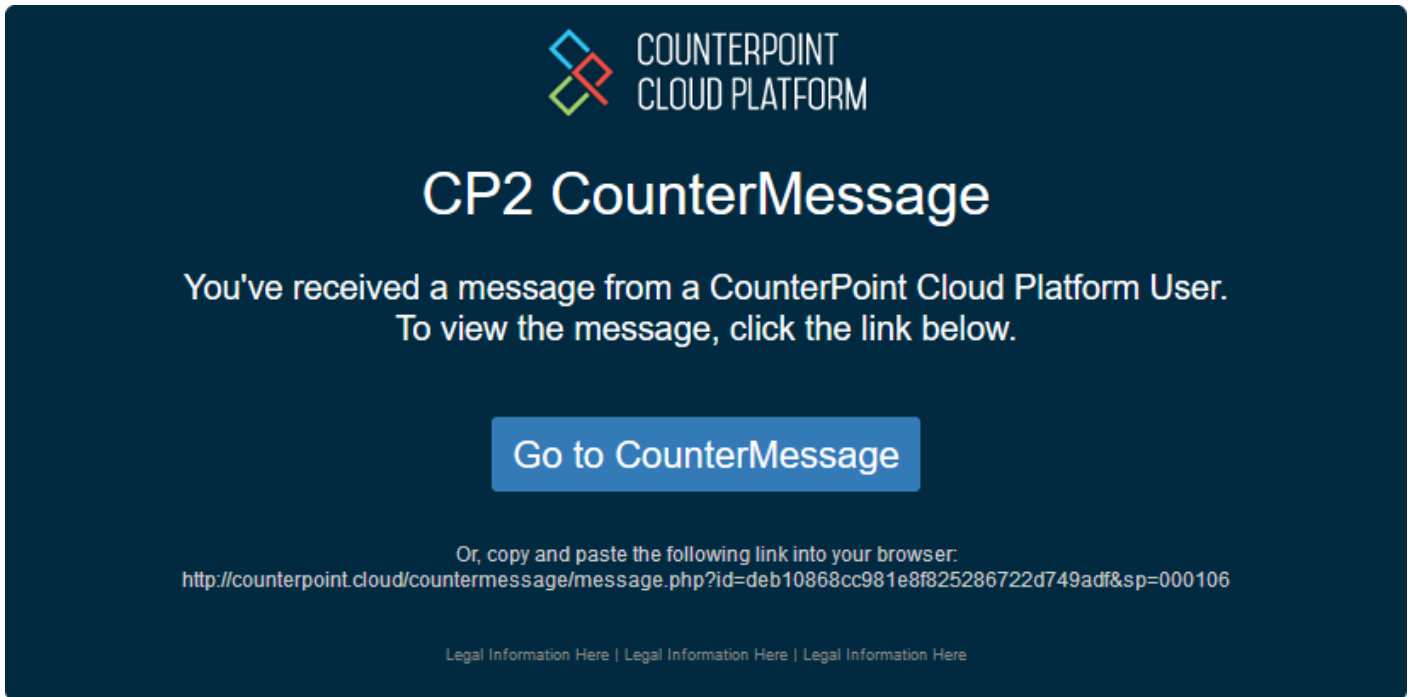
With this email, you can click the "Go to CounterMessage" link if your email client supports links. If not, you'll have to copy and paste the text below the link into your browser to view the message.

Response Screen

Once you've either clicked the link or copied it into your browser, you can view the actual contents of the message. If you are the only recipient of the message and you have no yet replied, the bottom of the screen will allow you to provide an identity and response message.

However, if the message was sent to multiple people, only one person is able to reply. Therefore, you may see that someone has already replied, and the identity/message that they chose to respond with.

Active and Archive Lookups

The active and archive lookup links allow you to view a history of messages you sent that are either still active (no reply) or archived (replied to).

These tables allow you to filter by any of the available columns, and default to the most recent messages first.

To view a message, you can click on the message preview to be taken directly to the message screen. In the event that someone has lost the link to your message, you can take the URL from your browser and send it to them however you like, so that they may see the message and respond.