Slack Broadcast

How and when to use the Slack Broadcast message from a Customer Account on the ERM

To use the **Slack Broadcast** message function you have to be in a Customer Account (the Customer Detail page). To access a customer detail page click here.

The Slack Broadcast message is a tool that allows an Iconic Worker using the ERM to send a message to other Iconic works regarding an event, product purchase, a problem or request help relating to a customer enquiry or customer account. By using the function , it means you do not have to copy and paste specific customer acccount details or event details and change between SLACK and the ERM. By using the function, it also creates a history note directly in the customer account for record logging and documentation, which reduces the need to copy and paste from slack straight into the ERM. Here are some things you could use the **Slack Broadcast** message function.

1. 1. Providing details to @eventmanagers about confirming details of an event with a customer.
2. 2. Requesting approval to change or edit customer account details.
3. 3. Sending event rosters to workers for a scheduled roster.
4. 4. To ask for help while a customer is on the phone and needed help.
5. 5. To provide information or ask questions about a customer account, a customer's product purchase, a customer account enquiry.
6. 6. All other related matters relating specifc to an event, customer account, account enquiry, sale, program guide.

How to use Slack Broadcast:

1. 1. Access and open the Customer Account

2. 2. Press the **Slack Broadcast** button

3. 3. **Select a Template** (optional). Templates are specific frequently used messages that contain specific messages or event or account or customer details that are automatically populated when the template is selected. After selecting a template, you are allowed to edit the wording or information to suit your specific need. Editing here does not affect the default template for other users.

    1. 3.1 When you select a template you will be asked to Enter ID for Template. This is helpful if you want the template to auto-populate specific details of the an activity, opportunity, order or product information specific to the company. It is optional to enter the ID. Without an ID the auto-populate will not fill and the message will be incomplete and require further editing from you. You do not have to enter an ID for each ID field, only where you want specifici information from. Do not delete the # that is displayed in the fields. Always leave the Customer ID number there to ensure the right account is selected.

        1. 3.1.1 **Activity ID** can be found by clicking on the Activity TAB of the customer account and copy and pasting the ID in the Activity ID field.
        2. 3.1.2 **Opportunity ID** can be found by clicking on the Opportunities TAB of the customer account and copy and pasting the ID in the Opportunity ID field.
        3. 3.1.3 **Order ID** can be found by clicking on the Order TAB of the customer account and copy and pasting the ID in the Order ID field.
        4. 3.1.4 **Order Product ID** can be found by clicking on the Order TAB of the customer account and copy and pasting the ID of the Product Details in the

Order Product ID field.

2. 3.2 Press **Generate Slack** button to allow the template to populate and add the appropriate information from the template. If you do not want to use the template auto-populate content press the **Cancel** button.

4. 4. **Subject Field** Enter a heading for the subject of the message. This could be "Confirming Event Details" or "Please help" or "Change to change customer work email address". Be as specific as you can, but not long-ended as the Details box is for the actual information. The subject field is a brief hint or idea of what the content of the details page is.

5. 5. **Detail Field** Enter the specific details of the message you are wanting to discuss, communicate, ask. This here is also where the message of the templates will display. When typing in this box you can use specific formatting to bold or italicise text.
    1. 5.1. If you want a word in **bold** type the word as normal and add a * at the start and end of the word. Example if I want the word bold in this sentence to be *bold* I add the asterix before and after it.

    2. 5.2. If you want a phrase in **bold** type the phrase as normal and add a * at the stat and end of the phrase. Example if I want the *phrase bold in this sentence to be bold* I add the asterix at the start and end of the phrase.

    3. 5.3. If I want a word or phrase in italic, I do the same as above and replace the * with a _.

    4. 5.4. All slack messages should always have someone's name in it. To add a person's or group tag name in the message type @@ together and this will open up a DropField where you can select the name of the user name or group tag name. Do not worry if the name entered is a code. This is a security feature. In the slack message the correct name is displayed as long as you selected the correct name.

6. 6. **Send To.**
    1. 6.1. If you want the message to be displayed in a channel select the Channel button.

    2. 6.2 If you want the message to be sent as a private direct message to a user (Iconic worker) select the User button. Please note, you cannot send group direct private messages from the ERM.

7. 7. **Select Channel.** Depending on what option you selected in point 6 the dropfield will display the appropriate list of what you are available to use. Becareful that you select the correct channel or user to avoid delays in replies.

8. 8. **Send Slack.** When you have complete all 7 steps above, press **Send Slack** button. The message will be sent to the channel or user you choose. The **Close** button closes the window, cancels your message being sent, if you have not already pressed the **Send Slack** button. The **Close** button does not save any of your details you entered if you have not sent the message.

9. 9. After sending the message on Slack using the function you will see the following message "Message Sent Successfully . Do you want to schedule an Activity for this SLACK Broadcast message?"
    1. 9.1 If you want to schedule a follow up activity for yourself or another Iconic Worker press the **OK** button. Complete the followup activity. For the procedure on how to setup a followup activity click here.
    2. 9.2 If you do not need to create a followup activity press the **Cancel** button to finish and close the function.
10. 10. You have now completed the entire process of using the **Slack Broadcast** message function. You can check the history of the customer account for the history note and you can check the slack channel for the message you have sent.

How to Add, edit, delete and Manage Slack Templates:

1. 1. Click here for the policy procedure.
2. 2. To do this you need to have user account permissions. If you do not have permissions contact your department supervisor for approval.

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