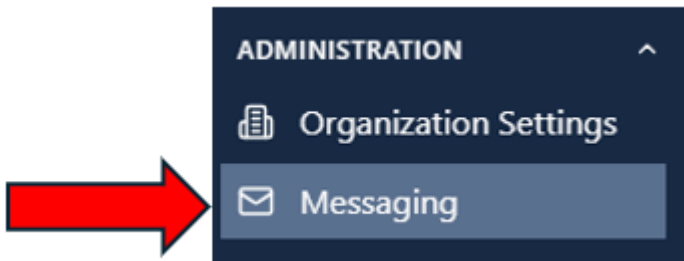


Phase 5: Messaging & Notifications



The **Messaging** screen allows you to standardize the messages sent to customers, subcontractors, and internal staff based on specific project triggers or manual actions. The dashboard is divided into two primary tabs for managing your communication strategy:

- **Templates Tab:** Use this area to build and edit the content of your messages.

Templates										
Display Name	Tenant	Audience	Message Event	Type	Email	SMS	Push	Status	Visibility	Actions
AI Generated Visualization	Bigg R's Bahama Bungalow Pools & Lagoons	Customer	project.share.ai.visualizati...	Triggered	☒	☐	☐	✓ Active	Published	⋮
Const:On My Way - Copy	Bigg R's Bahama Bungalow Pools & Lagoons	Customer	construction.manual.mes...	Manual	☒	☒	☐	✓ Active	Published	⋮

- **Message Queue Tab:** Use this area to monitor the status of sent messages or those pending delivery.

Message Queue								
Search messages...				All Channels	All Statuses	Refresh	<input checked="" type="button" value="Table"/> Cards	
Id	Message Type	To	Channel	Delivery Status	Provider ID	Retries	Created	Actions
1413	sales.contact.assigned	Brutus Buffalo	SMS	Sent	SM49592b552e...	0 / 3	Feb 11, 1:36 PM	⋮
1412	sales.contact.assigned	Brutus Buffalo	Email	Sent	W6mx8g35Reia...	0 / 3	Feb 11, 1:36 PM	⋮
1411	sales.contact.assigned	Brutus Buffalo	SMS	Sent	SM23ccde9ddf...	0 / 3	Feb 11, 1:34 PM	⋮
1410	sales.contact.assigned	Brutus Buffalo	Email	Sent	pMW08VkJZQ1eT...	0 / 3	Feb 11, 1:34 PM	⋮



The **Mine** tab shows the message in your organization

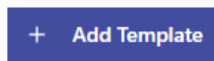
The **Library** tab shows available system templates available to be copied to your organization.

Template Management Table

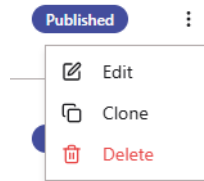
The main table provides a detailed overview of your active message templates:

Column	Description
Display Name	The internal name of the message template.
Audience	Who receives the message (e.g., Customer, Task Owner, or Sales).
Message Event	The specific action that triggers the message (e.g., "construction.phase.assigned").
Type	Indicates if the message is Triggered automatically by the system or sent Manually .
Channels	Checkboxes indicating if the template is configured for Email , SMS , or Push notifications.
Status/Visibility	Shows if the template is currently Active and Published for use.

- **Create New Template:** Click the blue + **Add Template** button in the top-right corner to start building a new communication workflow.



- **Edit Existing Messages:** Use the **three-dot action menu** on the far right of any template row to modify the content, change the audience, or adjust the trigger events.



The **Edit Message Template** window (or setup window) allows you to configure exactly how and when automated or manual communications are sent to your customers, staff, and partners. By utilizing dynamic tokens, you can create personalized messages that automatically pull in relevant project data.

Basic Template Information:

Display Name: Assign a clear, internal name to help you identify the template in your dashboard (e.g., "Construction Phase Assigned").

Status & Visibility: Use the toggles to mark the template as **Active** or **Inactive** and determine if it is **Published** for use across the organization.

Template Type: (e.g., **Construction** or **Sales**).

Message Event: Select the specific system action that initiates the message, such as construction.phase.assigned.

Type: Define if the message is **Triggered** (sent automatically by the system) or **Manual** (sent by a user action).

Channels: Choose the delivery methods by toggling **Email**, **SMS**, or **Push** notifications.

Send To: Designate the recipient group, such as the **Task Owner**, **Customer**, or **Sales** team.

Subject: Create a compelling subject line. You can use tokens like {{task.name}} to make the subject dynamic.

Tokens (Dynamic Data): The window provides a library of data placeholders (e.g., task.name, task.due_date, task.assigned_to).

Body Editor: A full rich-text editor allows you to format your message with bolding, lists, and links. You can build out clear templates that include project names, numbers, and addresses using the available message tokens.

Signature: Optionally toggle a standardized signature to be appended to the bottom of the message.

Edit Message Template

Display Name *

Construction Phase Assigned - Copy

Status

Active

Visibility

Published

Message Event *

construction.phase.assigned

Type *

Triggered

Template Type

Construction

Template

Select template

Phase

N/A

Status

N/A

Days

N/A

Channels

Email

SMS

Push

Signature

None

Send To *

Task Owner X

Subject

NEW PHASE ASSIGNMENT : {{task.name}}

Body

All Tokens

task.name task.due_date task.assigned_to task.description task.status

Normal B I U S [List Icons] Link Code T_x

You have been assigned a new phase. Details Below

Project: {{project.name}}
Project Number: {{project.number}}
Project Address: {{project.address}}
Assigned To : {{task.assigned_to}}

Cancel

Update Template