How to Guide

How to manage messages when one of your team goes on leave

You may wish to create a notification to clients logging into the portal during a period of leave for a member of staff. Whether this is planned leave or unexpected this might be something to consider.

Although the client isn't messaging an individual person at the business there is often an assumption that the message is being delivered to their adviser.

You can create a notification so that it pops up immediately when a client logs in to their portal via the desktop or mobile App.

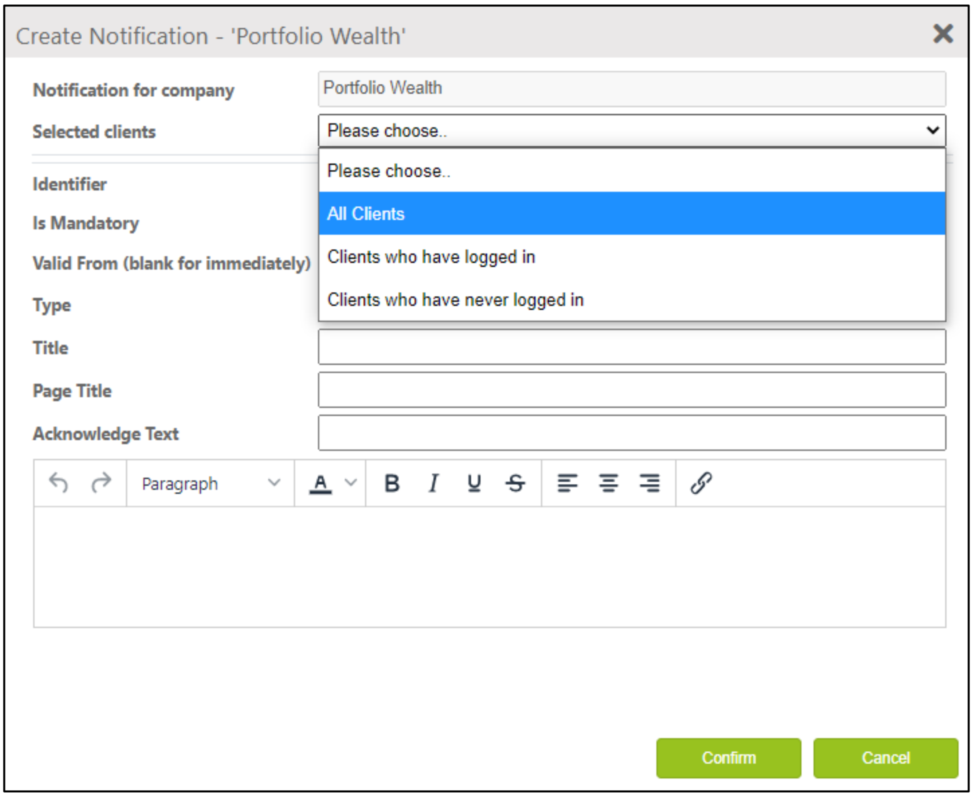
It can be created for all clients, a selection of clients or a list of clients created using the Advanced filter.

Creating a notice of Leave/Holiday/Sick Notification:

1. Log into moneyinfo Manager, from the home page, to the right-hand side of your company name

2. Click Action

3. + Create Notification



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4. Choose whether this is for **all clients**, or just those that have or haven't logged in, for this purpose we would suggest 'All clients.'

Field	Options	Description
Identifier		Optional – This is allocated internally but you can set one if you wish to include an internal identifier
Choose 'is Mandatory'		A Mandatory Notification is displayed prior to the client completing log in.
Valid From		(leave blank for immediately) If a date is set then the notification will not be generated until this date occurs.
Valid To		(leave blank for no end date) If a date is set this will terminate the generation of a new notification to any recipient client that hasn't logged in before the date. If a notification has already been generated but not dismissed/ submitted, then it will not be cleared from the clients record.
Type	Choose Html	This is where you can enter your own wording to be present to your client.
Title		This is the text that will appear as the notification title and is visible to the client. For example: Annual Leave | Roger Smart
Page Title		Page Title into which the notification is displayed and is visible to the client. For example: Annual Leave | Roger Smart

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Acknowledge Text		This is the text you want to show to your client for any acknowledgment. For example: Noted, or I Understand
Under Acknowledge Text	Free type wording	Please be aware that your adviser is on holiday currently however, any messages being sent via the portal are being monitored in the normal way and your query will be dealt with by the appropriate person etc.

5. Fill in the details as above and click 'Confirm'

To do this for a **selection of clients**:
Go to 'Clients', put a tick into the box to the left-hand side of the clients who should receive the notification.
This will show the total number of clients chosen in the 'Bulk Actions' box, then you can follow from **Step 3** above.

To do this for a **specific team or teams**, go to:
'Clients'>Click on 'Teams'>Deselect all and choose the relevant team(s)
Click 'Search'
Then Click on 'Bulk Action', select all in 'Search', then 'Bulk Action'>Create 'Notification' you can follow from **Step 3** above.
Click 'Confirm'

You can also access the Operator that is on leave and go to 'Organisation' and click 'Action'>Edit Operator, 'Notifications'.
Add an alternative email address for notifications to be sent to if required although this is optional and may not be required.