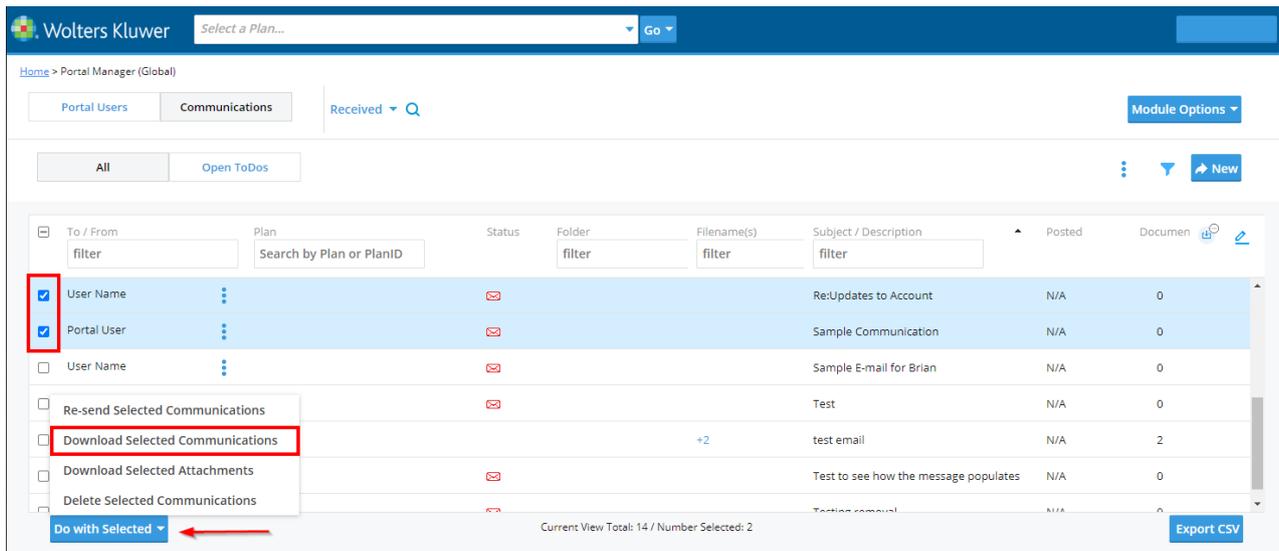


Saving Copies of Sent or Received Messages and Communications

06/13/2024 11:13 am CDT

If you would like to download copies of your communications including Direct Messages you may do so by navigating to Global or Plan level dashboard (keep in mind Direct Messages are only located on the Global Dashboard, you are able to download any other communication from the Plan or Global dashboard.) From here you can select the communications you would like to export to store outside the software by putting a checkmark to the left of the communication. Once selected, click on the 'Do with Selected' option below the grid and select the 'Download Selected Communications'.



This will create a zip file that contains the indicated messages and will itemize the files by the Portal Users Name:



Once you open the Portal Users file name, you will see folders sorted by 'Sent' and 'Received' (if you only download messages that were received back from the user, only the received folder will populate.)

Once the folder is opened the communications will be itemized once more by the individual communication and the date in which it was received in the naming convention:

