

Send Communications Page

The Send Communications Page of the Communications Module allows individuals with the appropriate module access level (administrators and supervisors by default) to send communications within KAStack.

All communications sent via KAStack are logged.

Send Communication

TEMPLATES

To

SHOW ADVANCED OPTIONS

Subject

Message

All communications sent via KAStack are logged.

Attachments

UPLOAD FILES ATTACH DOCUMENTS

RESET SEND

To send a message in KAStack from the Communications Page, select the individuals, Certification Roles, or Access Levels who are to receive the message being sent, inputting a subject line and message. Communications can have attachments from your personal device uploaded to them or have files from the Documents Module attached.

How To: Send an Email in KAStack

How To: Upload a File to an Email

How To: Attach a Documents Module File To an Email

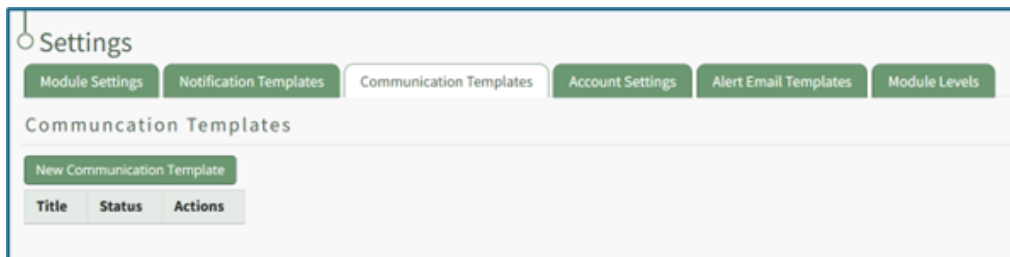
The templates button on the far right allows an individual to select and apply communications templates.

How To: Use a Communications Template when Sending an Email

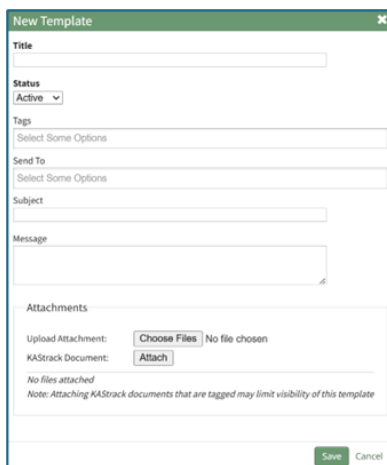
If a Communication Template is applied to a message on the Send Communications Page, the template will override any information that was manually entered in the subject line and message field.

How To: Create New Communication Templates

To create a new communication template, go to the Communication Templates Tab on the Settings Page of the Communications Module.



Select the “New Communication Template” button opening the New Template Modal.

A screenshot of the 'New Template' modal form. The form contains the following fields: 'Title' (text input), 'Status' (dropdown menu with 'Active' selected), 'Tags' (text input with 'Select Some Options' placeholder), 'Send To' (text input with 'Select Some Options' placeholder), 'Subject' (text input), 'Message' (text area), and 'Attachments' (file upload section). The 'Attachments' section includes an 'Upload Attachment' button, a 'Choose Files' button, and a note: 'No files attached. Note: Attaching KAStack documents that are tagged may limit visibility of this template'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Input the Title for the Template.

Select Active / Inactive from the dropdown menu to indicate if the template is available for use.

Tags can be selected from a dropdown menu to organize templates and/or control visibility.

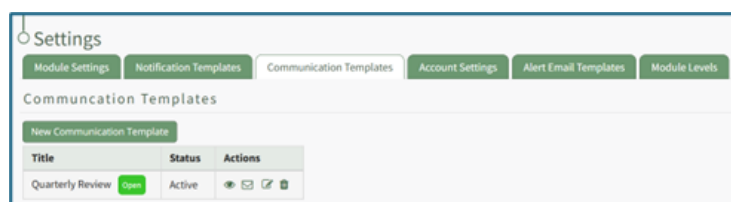
Both individual people and certification roles can be selected as desired recipients via dropdown menu in the “Send To” line.

Include the subject line for communications, as well as a message.

An attachment can be uploaded from your personal device to be included in the template, or you have the option to select one or more files from KAStrack’s Document Module.

KAStrack documents that are tagged may limit visibility of this template. Specifically, if a template contains a tagged document you cannot see, you will be unable to see the template when sending a communication. Individuals with access to a Document that has visibility restrictions for others via Tags cannot use Send Communication to send that tagged Document to users that lack the authorization to see it.

Select “Save” and the New Communications Template will show in the Communications Template Table on the Settings Page.



The template can now be applied as desired when sending communications in the system on the Send Communications Page. You can also click the closed envelope symbol in the Communication Templates table to go to the Send Communications page and pre-fill the chosen template.

Advanced Options

Clicking “Show Advanced Options” beneath the To field expands the Send Communication Page showing advanced options for sending messages.

By default, Advanced Options are only available for Admin Access Levels.

To

HIDE ADVANCED OPTIONS

- Include sender details
The following message was sent by Mitzi Orkus (morkus) will be included at the start of the communication.
- Send communication to:**
- Primary Email Address
- Default CC / BCC settings

Selecting the “Include sender details” checkbox will include the following message at the start of the communication, “The following message was sent by FIRST NAME LAST NAME (Username).”

Selecting the “Primary Email Address” checkbox will send the communication to the primary email address of the individuals or certification roles listed in the “To” line. The Primary Email Address refers to the system account field “Email” on users’ accounts.

Selecting the “Default CC / BCC Settings” checkbox will send the communication per the customized specifications made on the Module Settings Tab of the Settings Page in the Communications Module.

Any other additional account fields set as type “Email” will show below the “Default CC/BCC Settings” checkbox. If the additional account information field is already selected through the CC/BCC Settings, it will show in gray and state “(Already CC’d)”.

Send this communication to:

Primary Email Address

Default CC / BCC Settings

Regional Managers *(Already CC'd)*

District Managers

Any additional account information fields not already included through your customized settings will show with a checkbox and can be added if desired.

In order to customize CC/BCC Settings, review the section on the Module Settings Tab.

How To: Set Up Additional Account Fields for Email Settings

To utilize the CC and BCC Email Settings on the Module Settings Tab of the Settings Page in the Communications Module, you must first set up additional user account information fields.

To set up additional user account information fields with email settings, go to the Account Fields Tab of the Site Settings Module.

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action	
≡ Drag Me	Employee ID	No	Edit	Delete
≡ Drag Me	Phone	No	Edit	Delete
≡ Drag Me	Address 1	No	Edit	Delete
≡ Drag Me	Address 2	No	Edit	Delete
≡ Drag Me	Regional Manager(s)	No	Edit	Delete

Select “Add a Field” beneath the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field

Label *

Type *

Allow multiple values

Required

Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supervisor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Observer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logged out user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Enter a Label for the new field, and select “email” as the type of field.

The checkboxes below allow for customization. Select “Allow multiple values” if there could be multiple emails associated with this field for an account. Select “Required” if you would like to require that this field be filled out for each account. Selecting the “Sensitive field” checkbox will tell KAStrack not to show this information when the field is being included in a report or form entry.

Select the permissions to be granted for each Accounts Module Level for this field, communicating if each Module Level can view their own/others and edit their own/others.

Under Accounts Module Level in the permissions grid, “Logged out user” refers to how fields will be displayed to users creating their account via a Registration Profile Link. To allow users to fill in information for the chosen field, ensure that the Edit Own permission is enabled for that field for “Logged out user”.

Select “Save” to create the new account information field.

Accounts

Account Info Reset Password

Account info: Mary Carter ...

Username	mcarter
Email	mcarter@traversefences.kastrack.com
First Name	Mary
Last Name	Carter
Home Page	
Employee ID	
Phone	
Address 1	2847 Willow Creek Dr, Fargo, ND 58103
Address 2	
Regional Manager(s)	steve.escobar@jffitness.com
Regional VP	jane.goodall@jffitness.com

The newly created email account fields will now show on the Account Info: (UserName) Page.

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