

Settings Page: Module Settings Tab

The Module Settings Tab on the Settings Page of Communications Module allows a user to designate preferences for communications manually sent through the Send Communications Page of the module as well as for communications automatically sent from the system.

The screenshot shows the 'Settings' page with a breadcrumb trail 'Communications > Settings > Module Settings'. The 'Module Settings' tab is selected, showing options for 'Notification Templates', 'Communication Templates', 'Account Settings', 'Alert Email Templates', and 'Module Levels'. Under 'Module Settings', there are two sections: 'CC and BCC emails' and 'System Settings'. The 'CC and BCC emails' section includes four checkboxes: 'Enable CC', 'Enable BCC', 'Enable Catch Missing CC', and 'Enable Send Communication CC', along with a 'Save CC Email Settings' button. The 'System Settings' section includes a checkbox for 'Suspend all communications' with a warning note: 'If checked, no messages will be sent to users!'.

Settings

Communications > Settings > Module Settings

Module Settings

CC and BCC emails

- ☐ Enable CC
- ☐ Enable BCC
- ☐ Enable Catch Missing CC
- ☐ Enable Send Communication CC

Save CC Email Settings

System Settings

- ☐ Suspend all communications

If checked, no messages will be sent to users!

Email Settings

There are three checkboxes that allow for the customization of communications automatically sent from the system: Enable CC, Enable BCC, and Enable Catch Missing CC. The fourth checkbox, Enable Send Communication CC, pertains to the customization of manually sent communications.

In order to utilize some of these module settings features, you must set up additional account fields first.

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 *
Regional VP

Type *
Email

☐ Allow multiple values

☐ Required

☐ Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	☒	☒	☒	☒
Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

Save Cancel

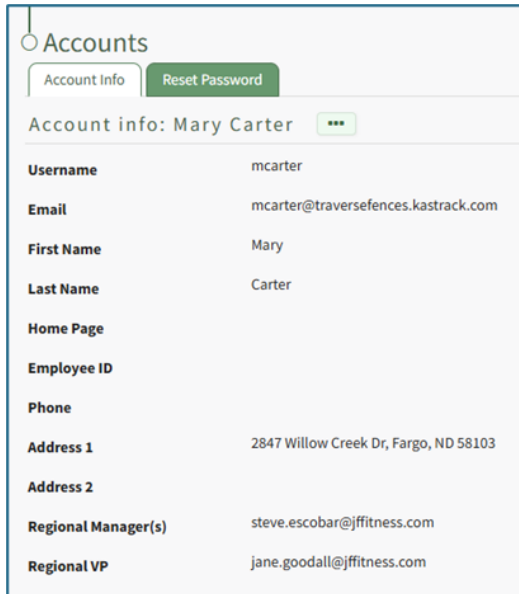
Enter a Label for the new field, and select “email” as the type of field.

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.



The screenshot shows a web interface titled "Accounts". Below the title are two buttons: "Account Info" (highlighted) and "Reset Password". Under "Account Info", it says "Account info: Mary Carter" followed by a three-dot menu icon. Below this is a list of account fields and their values:

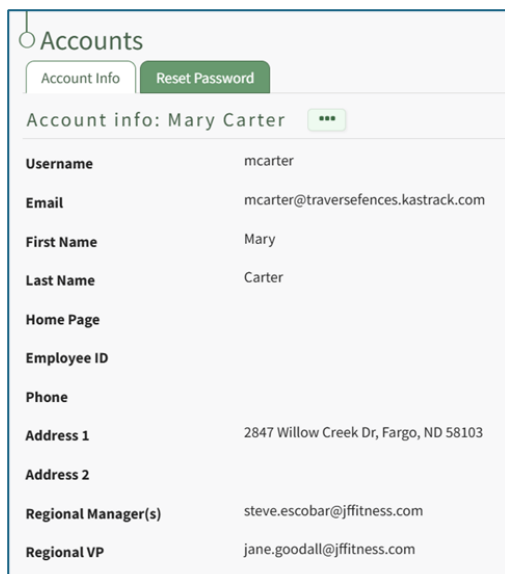
Username	mcarter
Email	mcarter@traversefences.kastrack.com
First Name	Mary
Last Name	Carter
Home Page	
Employee ID	
Phone	
Address 1	2847 Willow Creek Dr, Fargo, ND 58103
Address 2	
Regional Manager(s)	steve.escobar@jffitness.com
Regional VP	jane.goodall@jffitness.com

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

Traditionally, CC (carbon copy) and BCC (blind carbon copy) are ways of including additional recipients in an email besides the main person (or people) the email is addressed to.

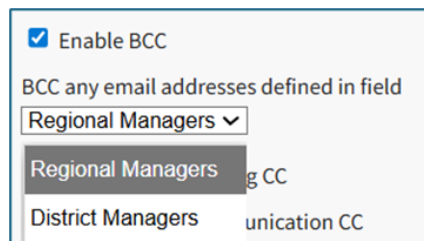
Selecting “Enable CC” will CC included users for all communications automatically sent through the system and allows everyone on the email to see who was copied. An additional account email information field on the Account Info: (User Name) Page can be used to organize email addresses for individuals other than the primary email address on the account. Select the additional account information email field you would like CC’d from the dropdown menu shown when the Enable CC checkbox is selected.

Only one email account field can be selected via drop down menu.



This is an identical screenshot to the one above, showing the "Accounts" page with the "Account Info" section for Mary Carter. It displays the same list of account fields and their values.

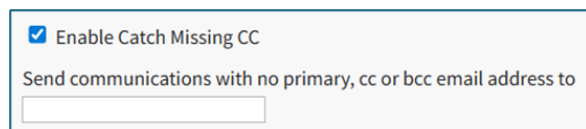
Selecting “Enable BCC” will BCC included users for all communications automatically sent through the system but does not allow the main recipients or CC’d recipients of the email to see who was copied. An additional account email information field on the Account Info: (User Name) Page can be used to organize email addresses for individual’s other than the primary email address on the account. Select the additional account information email field you would like BCC’d from the dropdown menu shown when the Enable BCC checkbox was selected.



A screenshot of a user interface showing a checkbox labeled "Enable BCC" which is checked. Below it is a label "BCC any email addresses defined in field" followed by a dropdown menu. The dropdown menu is open, showing two options: "Regional Managers" and "District Managers". The "Regional Managers" option is highlighted.

Only one email field can be selected via drop down menu.

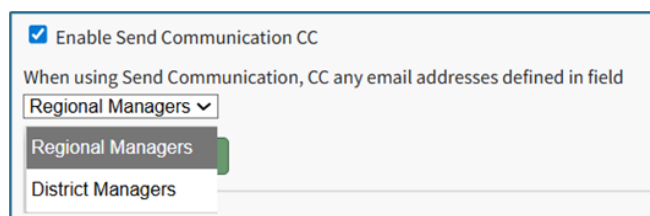
Select “Enable Catch Missing CC” and input an email address if you would like an email sent to an individual on behalf of a user whose primary email address field, as well as any CC and BCC email addresses (if present on their account), are all system-generated email addresses or blank. KAStrack has the capability to determine if an account user has input an email address of if a system-generated @[subdomain].katrack.com email address is being utilized.



A screenshot of a user interface showing a checkbox labeled "Enable Catch Missing CC" which is checked. Below it is a label "Send communications with no primary, cc or bcc email address to" followed by an empty text input field.

Selecting “Enable Send Communication CC” applies to the customization of manually sent communications originating on the Send Communications Page in the Communications Module.

Only one email account field can be selected via drop down menu, but additional email account fields can be selected from the Send Communications Page.



A screenshot of a user interface showing a checkbox labeled "Enable Send Communication CC" which is checked. Below it is a label "When using Send Communication, CC any email addresses defined in field" followed by a dropdown menu. The dropdown menu is open, showing two options: "Regional Managers" and "District Managers". The "Regional Managers" option is highlighted.

Users will still have the ability to customize their CC selection from the Send Communications Page.

[WIKI LINK ADVANCED OPTIONS \(SEND COMMUNICATIONS PAGE\)](#)

Send Communication

To: Sending to 0 people in total

Select Some Options

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 this communication to:

☒ Primary Email Address

☒ Default CC / BCC Settings

☐ Regional Managers (Already CC'd)

☐ District Managers

System Settings

System Settings

☐ Suspend all communications

If checked, no messages will be sent to users, other than system communications such as password reset emails!

If the “Suspend all communications” checkbox is selected, only necessary messages will still be sent to users. (e.g. Direct Communications, Password resets, etc.).