bluChat
User Guide

What is bluChat?

bluChat 3.0 is a powerful team chat and collaboration application specifically designed to increase cross-departmental productivity for NetSuite-based companies and their partners. As the only *native* NetSuite team collaboration tool, bluChat uniquely leverages NetSuite's "single source of truth" database strengths, and its familiar navigation conventions. bluChat supports both "on-record" and "off-record" collaboration. Message directly on any writable record such as customers, invoices and custom records. It also provides an area for Channels, Groups and Direct Messages. bluChat automatically supports key NetSuite functions and features, including automatically saving on-record chats directly to the relevant NetSuite record under the appropriate Communications tab (User Notes), for later search and audit.

Standard features include rich text formatting, file sharing, tagging, user profiles, emojis, task assignment, threads, and notifications to provide better communication, faster issue resolution, and unmatched options for staff and external stakeholder collaboration.

Taking just minutes to install and deploy, bluChat requires minimal training because it follows the standard NetSuite navigation already familiar to users. No new security measures or passwords are required, and System Admins do not have to set or reset record access permissions for bluChat. bluChat simply becomes additional functionality on whichever records staff and stakeholders already have authorization to access. The history of all chats, whether on-record or off-record, are saved and searchable.

bluChat supports all NetSuite file types, all custom and SuiteApp records, and all NetSuite workflow automations, enabling organizations to easily create their own status alerts and activity triggers. For NetSuite organizations, the combination of bluChat and workflow automation is a particularly powerful toolset for improving operational efficiencies across all departments, saving time and effort while leveraging an organization's existing investment in customization.

New for Version 3.0

- **Reply to Specific Messages.** Replying to a specific message is now supported, even if it was earlier in the chat stream. This allows for running commentaries on multiple message threads to remain on topic and in chronological order.
- **Reactions.** This provides the ability to react to a user's message with a specific emoji.

  For example, you could give a 👍 to a message indicating that you have read the user's message without having to reply with text directly. Under the message there may be a set of emoji reactions that people selected, along with a number indicating how many people reacted to the message with that emoji. Mouse over the emojis to see user names.
- **Additional User Settings.** The ability to disable email notifications and show user titles have been added to the personal profile settings.

Version 2.0 Additions

- **Channels.** These are typically company-wide "channels" or group chat streams on particular topics (Accounting, Marketing Campaigns, Customer Support) that are not tied to a specific NetSuite record and that any user can search for and join. There is no limit to the number of participants, and any user can start a channel.
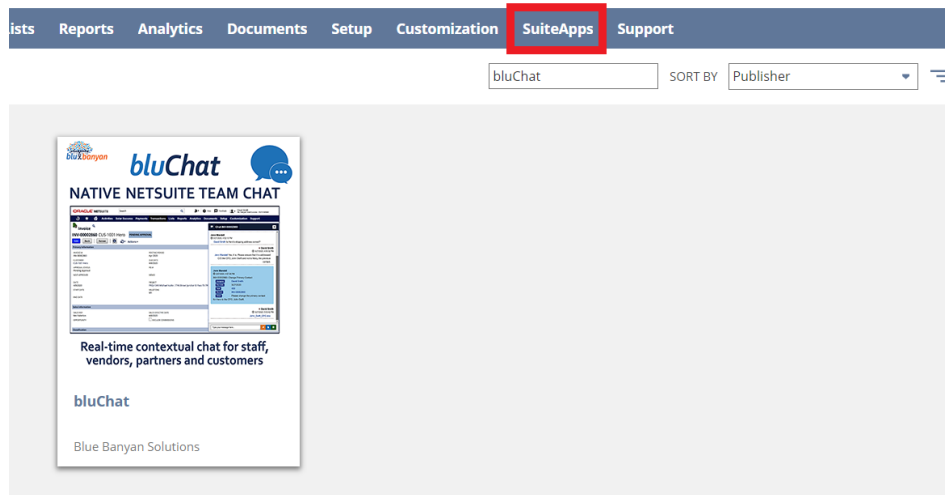
- **Groups.** These are private channels typically for smaller groups of people who are in regular communication about sensitive matters, or broader issues than a specific record. Participation is only by invitation of the Group's creator or the System Administrator, and there is no limit to user participation.
- **Direct Messages.** DMs are used for 1-1 discussions on any topic, and any user can search the company staff list in bluChat and invite another user to a direct discussion.

Getting Started

The installation & setup of bluChat will need to be configured by an Administrator.

How to Install bluChat

1. Contact Blu Banyan about obtaining a bluChat license.
    - bluChat is installed through NetSuite's SuiteApp marketplace.
2. Install through the **SuiteApps** marketplace.
    a. To install through the **SuiteApps** marketplace:
        - *Navigate* to **SuiteApps** and search for **bluChat** in the SearchApps box.

        - *Click* the bluChat page to install.
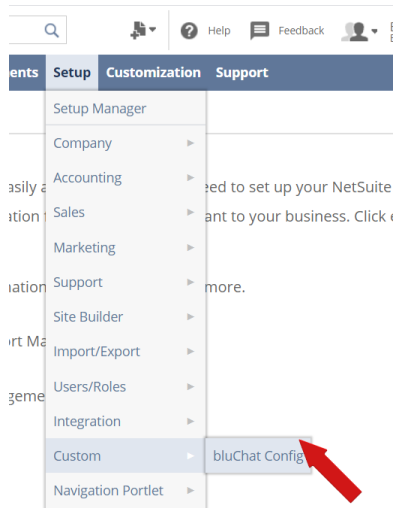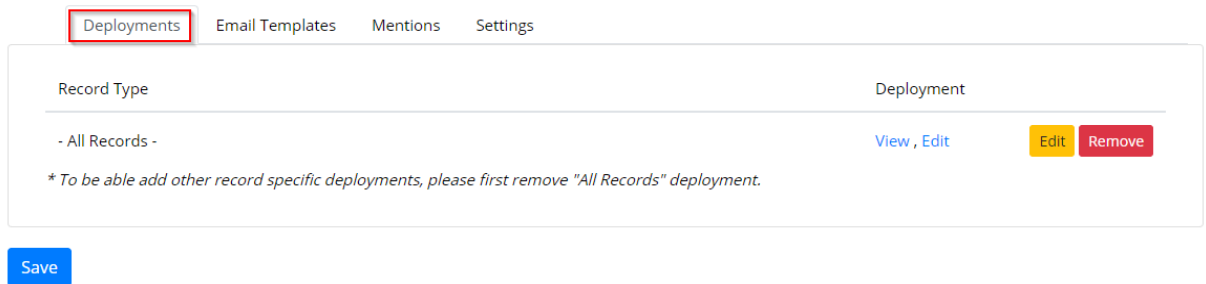
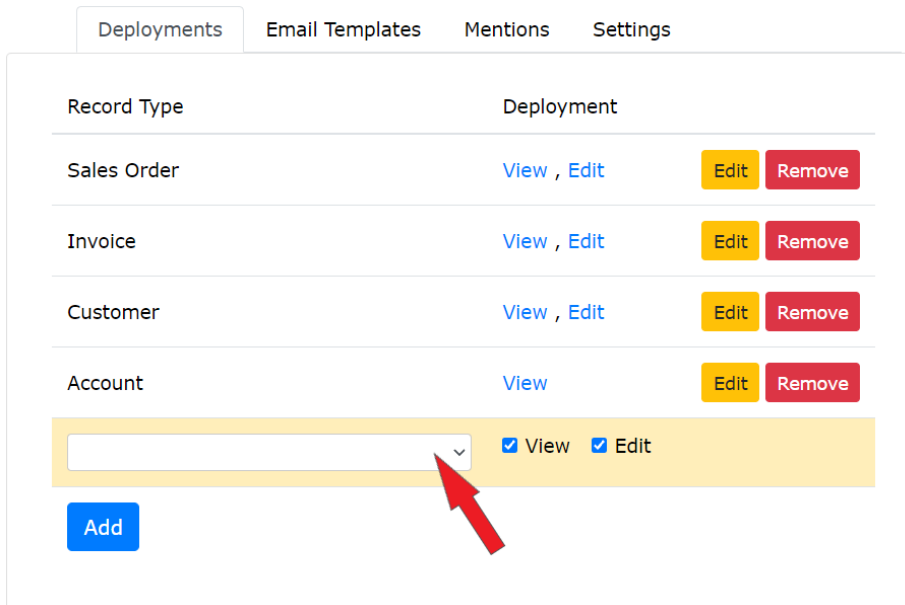## How to Deploy bluChat to Record Types in NetSuite

After bluChat has been installed, an Administrator will navigate to **Setup**>**Custom**>**bluChat Config**.

Select the **Deployments** tab.

Select the record type(s) where you wish to deploy bluChat.

Deployments	Email Templates	Mentions	Settings

Record Type	Deployment		
- All Records -	View , Edit	Edit	Remove

* To be able add other record specific deployments, please first remove "All Records" deployment.

*Note: if **-All Records-** is selected, bluChat is deployed to all available NetSuite records. To deploy to individual record types you must remove **-All Records-** as a deployment.*
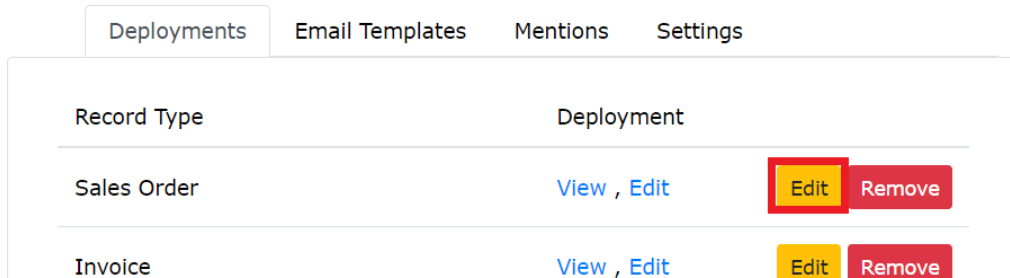
- ***Select*** deployment types available for your selected record type. You may choose to deploy chat to **View mode**, **Edit mode**, or both. ***Select*** the modes you wish to deploy to via the checkbox.
- ***Click* Add**.
- Repeat for each record type where you wish to deploy bluChat.
- ***Click* Save**.

bluChat is now deployed for your selected record type(s).

Permissions follow native NetSuite roles. To further refine user access, see the section on How to set the audience for a record deployment.
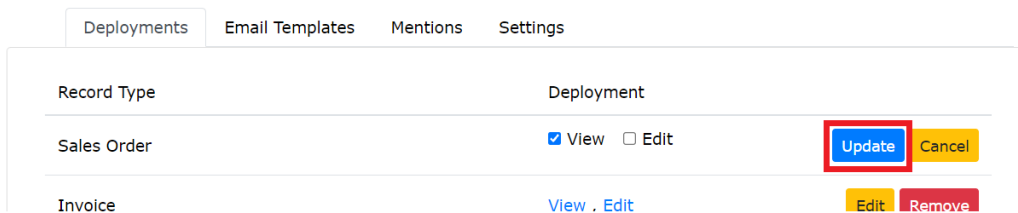
How to Change a Deployment

From the **Deployments** page in bluChat Config, select the **Edit** button of the deployment you wish to change.

Select or *deselect* View and/or Edit mode for the record type.

Click **Update**.

Click **Save**.

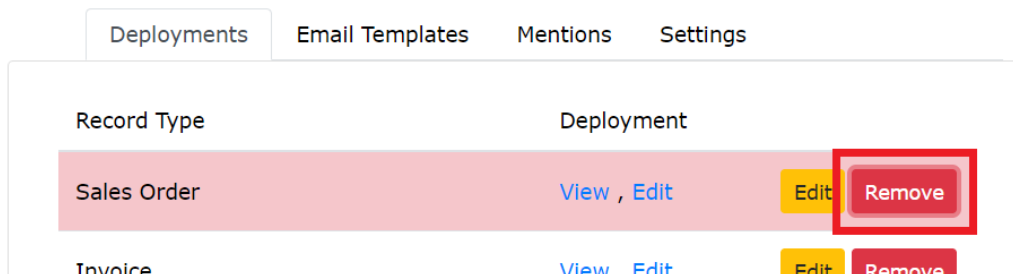## How to Remove a Deployment

Navigate to the **Deployments** page in bluChat Config.

Select the **Remove** button of the deployment you wish to remove.

Note: The selected deployments to remove will be highlighted in red.

Click **Save**.

Email Notifications from bluChat

When a user is tagged in bluChat, they will receive a notification email. Users will receive email notifications from the email addresses of the message owner configured in NetSuite.

> The exception to this is when the message owner is not a NetSuite employee. NetSuite limits the ability to send an email notification only to Employees.

> See **Set Up of the Default Employee Record for Notification Emails** for more information.

User's can edit their own profile to disable email notifications.

bluChat automatically fills in the "reply to" of the sender's email address so users may still respond to the sender's mentioned email.

> *Note: DKIM, SPF, DMARC should be configured with your provider and within NetSuite. Best practice includes the use of industry-standard email authentication through DomainKeys Identified Mail (DKIM).*

> *See SuiteAnswers https://netsuite.custhelp.com/app/answers/detail/a_id/9429 and https://netsuite.custhelp.com/app/answers/detail/a_id/84593 for more information.*
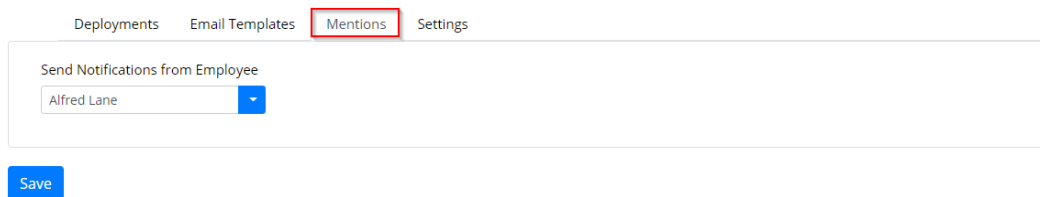
Set Up of the Default Employee Record for Notification Emails

Only employee users can send emails through bluChat. A default employee record must be selected in order to send email notifications from bluChat for other user types such as partners, vendors and customers which are unable to send emails via NetSuite.

As a general best practice, it is recommended to select or set up a generic employee record with a "noreply" email address as the user for the default employee record used to send a notification email. This way notifications can be sent from NetSuite but not tied to an individual employee's personal email.
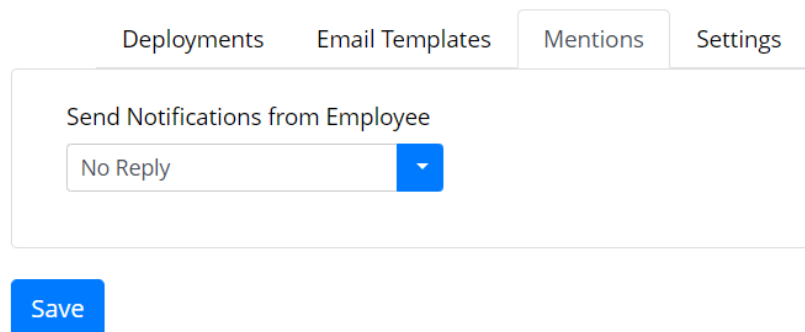
Note: This default employee record does not require login access.

After bluChat has been installed, an Administrator will *navigate* to **Setup**>**Custom**>**bluChat Config**. *Select the* **Mentions** tab.

Select the desired user for sending out notification emails. The example below uses a "No Reply" Employee without NetSuite access and is not monitored by the company.

Click **Save**.

bluChat Config Settings Tab

Use the **Settings** Tab to configure access for outside users and to further refine features.

Select whether to copy message text to user notes on the deployed record, whether to allow contacts, customers, partners, and/or vendors to access chat, whether to allow for channels, groups, and direct messages are available on the bluChat messages page, whether to send anonymous analytic data to Blu Banyan, and whether to show the user type in mention lists.

The "**Default employee to Send emails**" option sources the internal ID of the user selected on the dropdown menu from the **Mentions** tab. For more information on setting the default user for mentions emails, please refer to the section "Set up of the default employee record for notification emails" earlier in this guide.

The "**Show User Type in Mentions List**" option allows for the entity type to display for users who have been granted access to the chat. This can be helpful for differentiating between employee, vendor, customer, or partner users if user access has been extended.
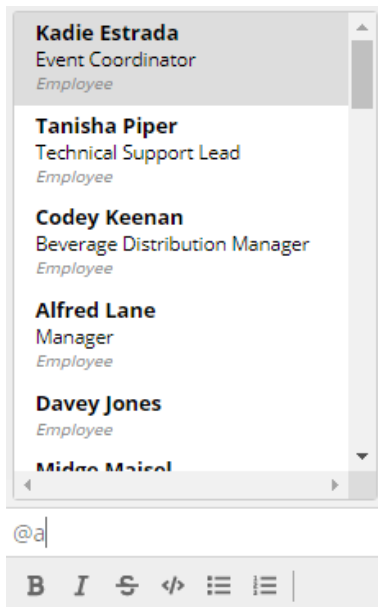
bluChat Messages Page

In addition to email notifications a user can be alerted to new tags by using the bluChat Messages page.

Users can also create channels, groups, and direct messages on the bluChat Messages page.

To open the page in your browser, navigate to **Activities>bluChat>bluChat Messages**.
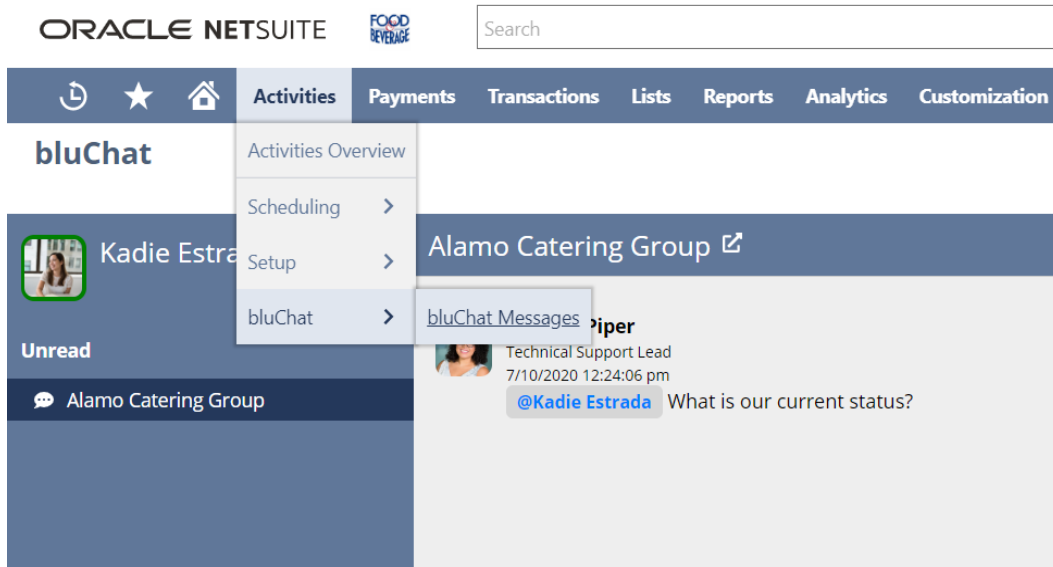
The page displays unread messages in which the current user has been tagged. The page displays the record(s) with unread tagged messages on the left and unread tagged messages for the selected record on the right. Setting your browser to allow notifications from the page will also allow you to receive system alerts that you have been tagged.
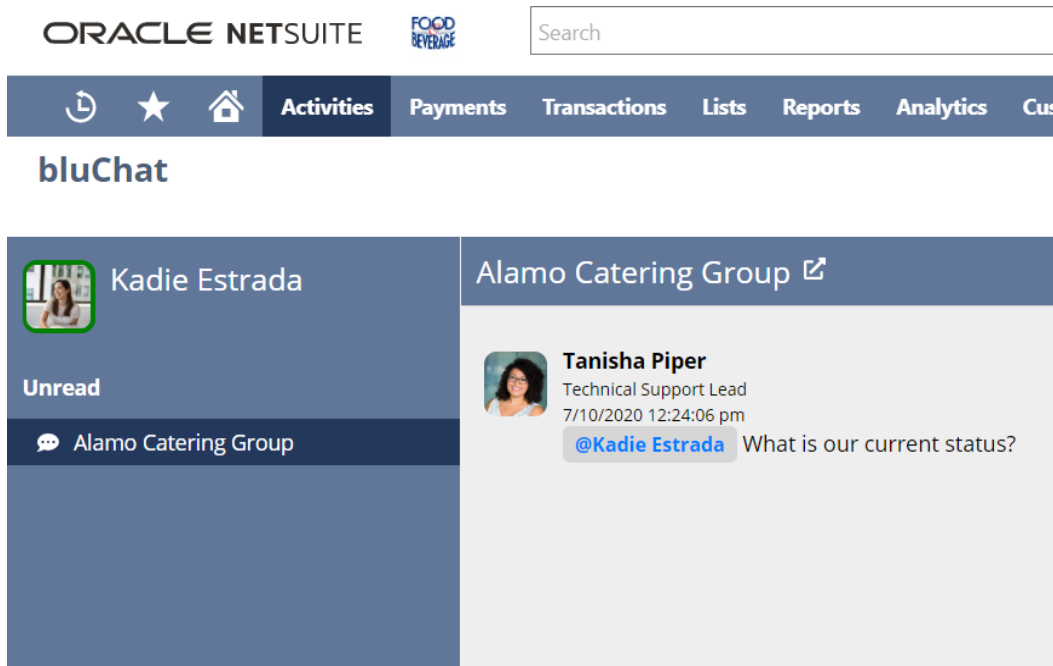
After selecting the record to view, *click* the external arrow icon to open the record in another browser tab.
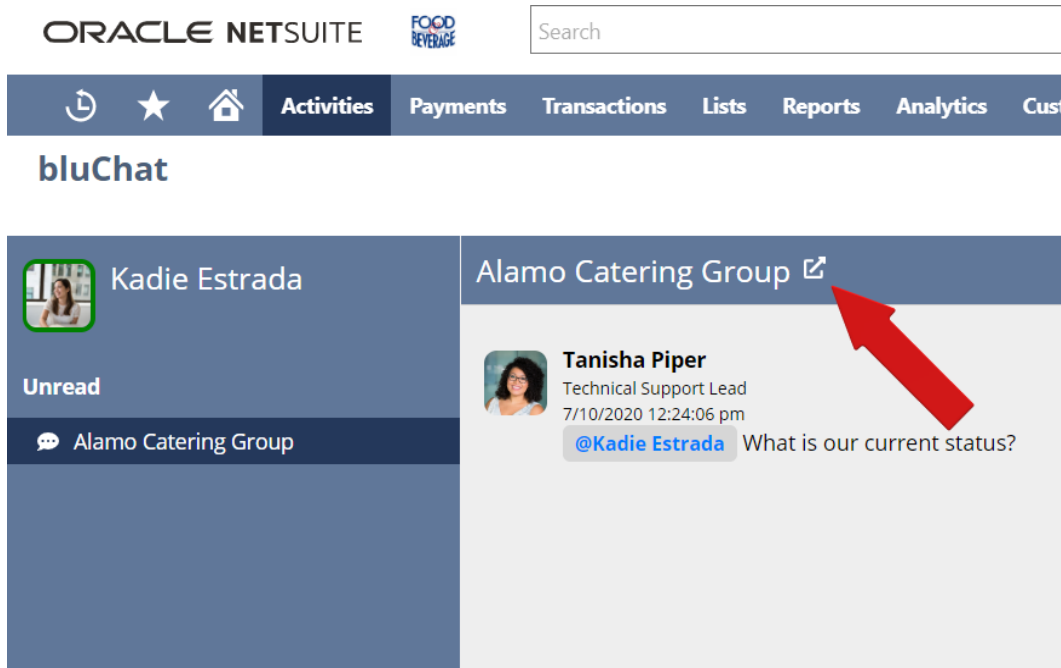
Once you have viewed messages on their respective record page(s), the messages will be removed from the bluChat messages page.

The chat window will display an unread messages icon in the upper right of the window indicating the number of unread messages in which you have been tagged.
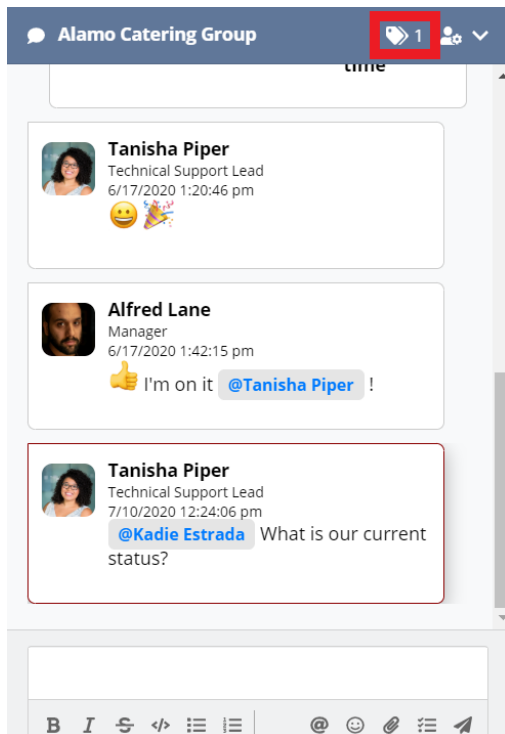
bluChat Dashboard Portlet

The bluChat Messages page is also viewable on a dashboard as a portlet. To install the portlet on a dashboard, *click* on the Personalize link at the top of the page.
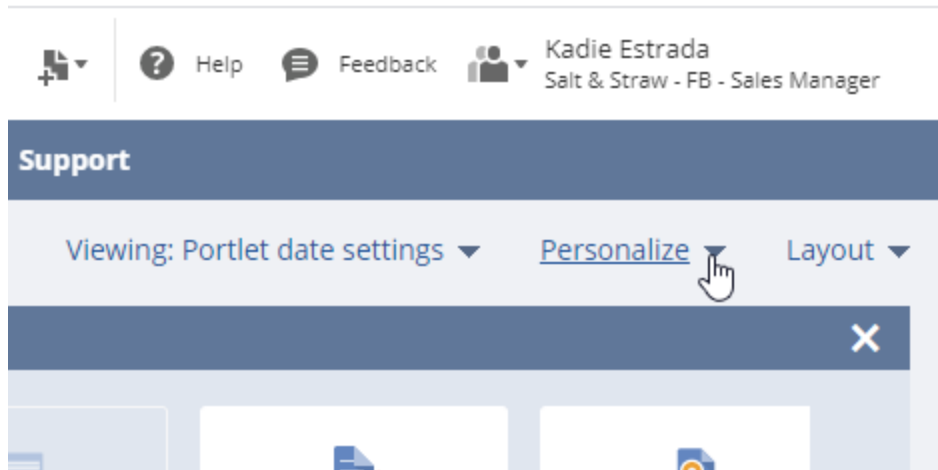
On the left menu, *click* on the SuiteApps link and drag and drop the bluChat messages portlet onto the dashboard.
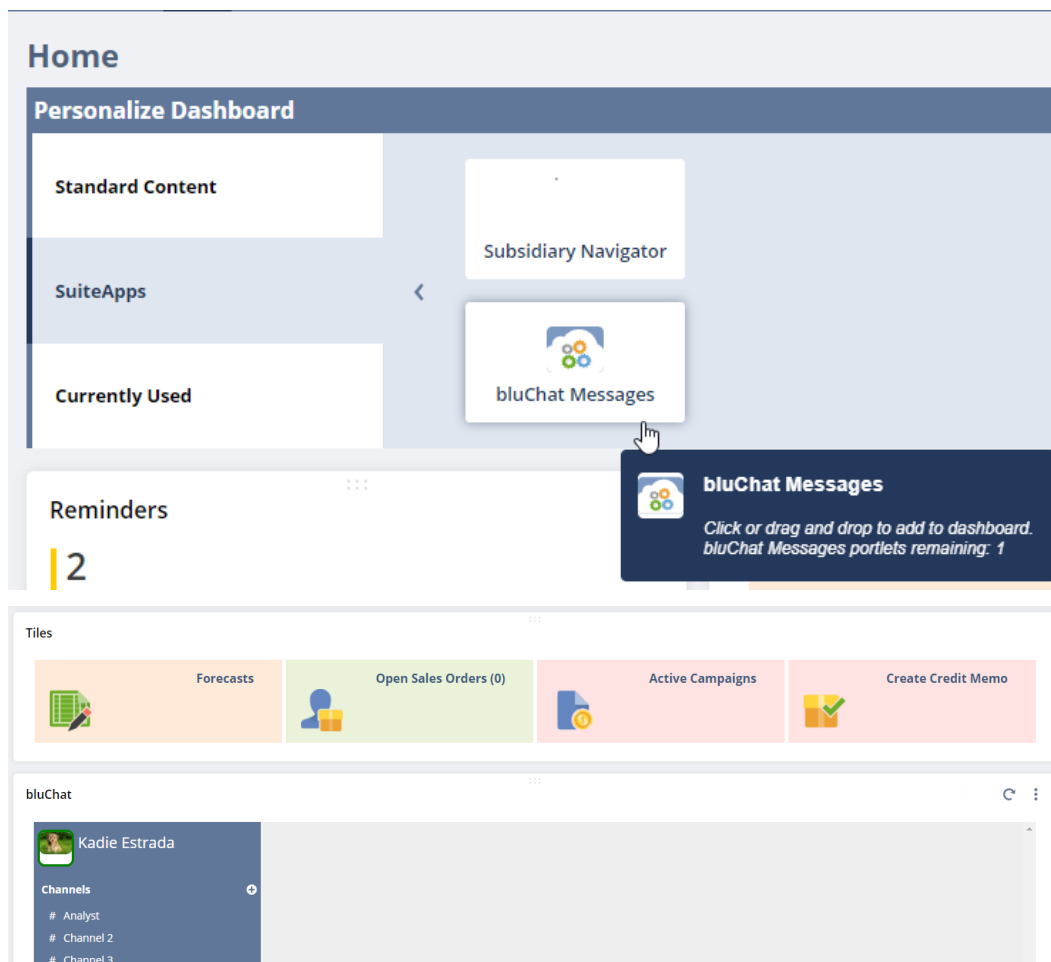
bluChat Badge Notifications

bluChat badge notifications are also available on scriptable records at the top of the page next to the user name.
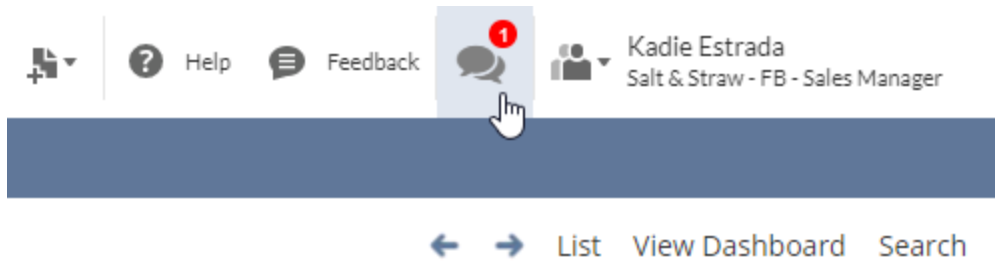
Clicking on the notification icon will open the bluChat messages page in a new tab where a user can review any unread messages.

Note: Badge Notifications can only display on scriptable records and will not display on dashboard pages.

General use of bluChat (on Record)

Use bluChat on a record page from your selected record deployment(s). As per your deployment, make sure you are in the appropriate View or Edit mode.

How to Open the Chat Window

To open the chat window, *click* on the speech bubble box on the bottom right corner of the page.
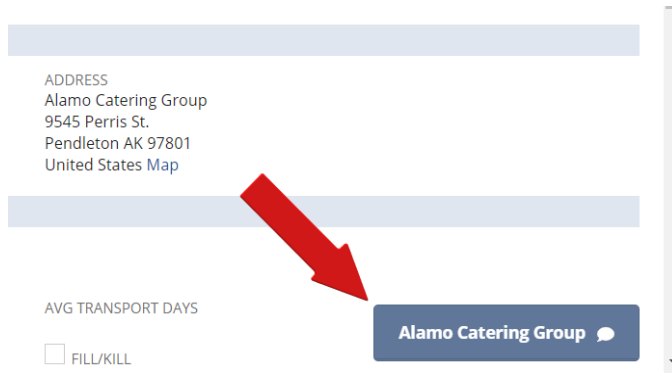
How to Minimize the Chat Window

To minimize the chat window, *click* on the down chevron in the upper right corner of the chat window.
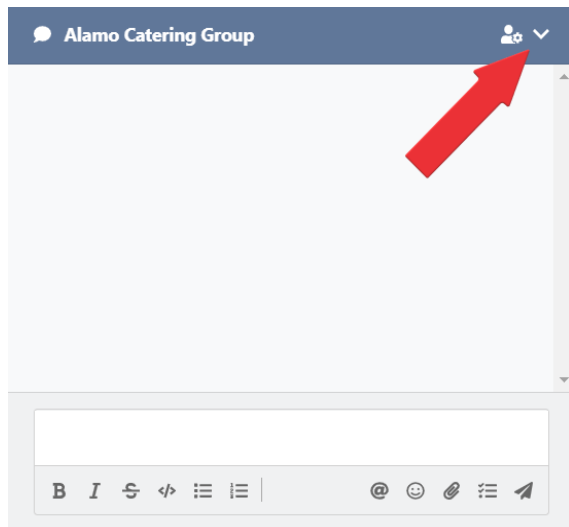
How to Resize the Chat Window

To resize the chat window, **hover** your mouse over the top left corner of the chat window until you see the white corner.
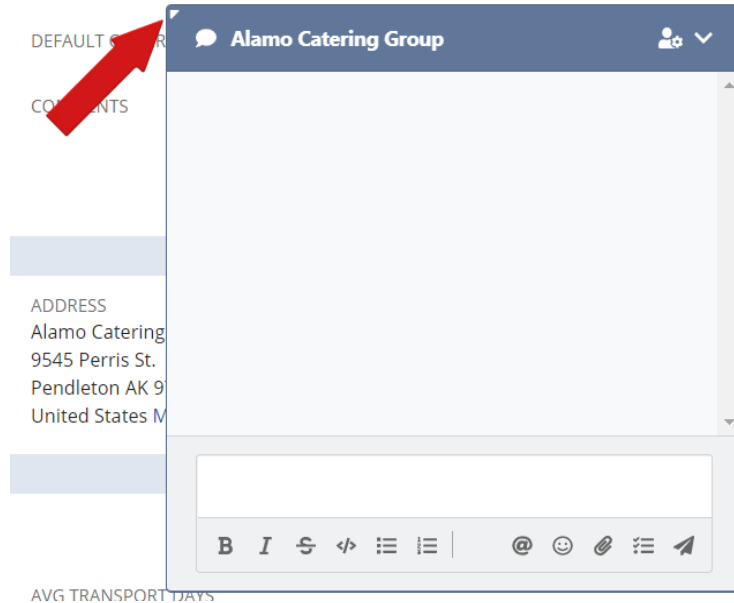
Click and drag the mouse in the direction of your desired size and then release.
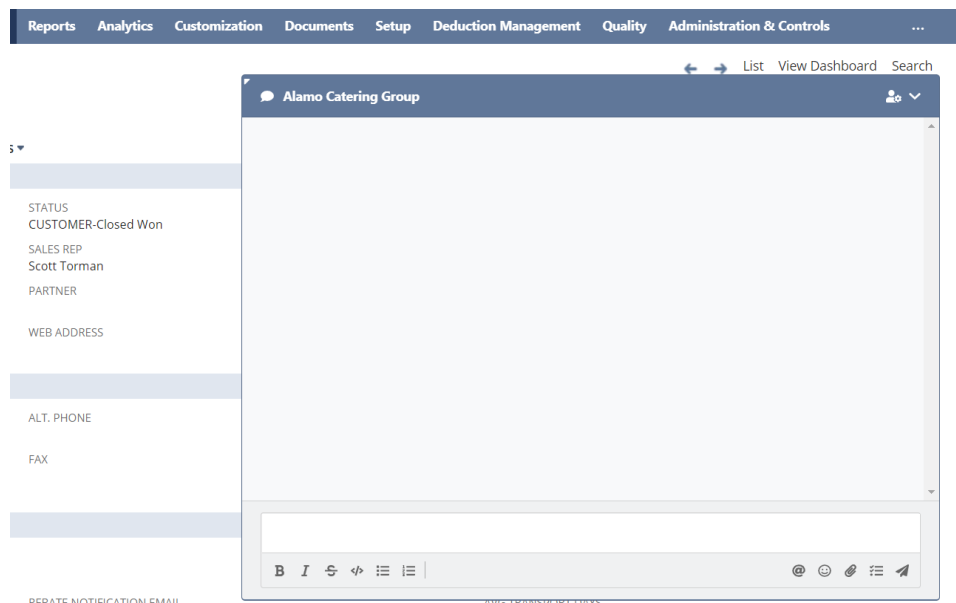
Note: bluChat will remember your sizing.

How to Upload a File with the File Upload button

You can upload a file through bluChat two ways:

Click the **File Upload** button.
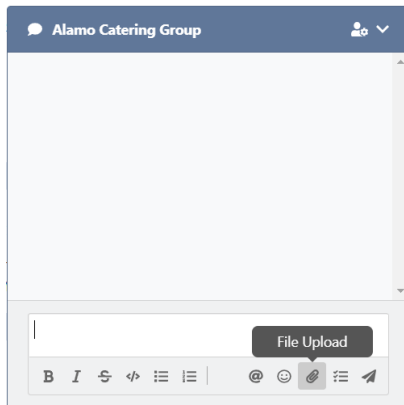
In the new window, *navigate* to and *select* the desired file to upload. *Click* and *select* **Open**.

The file will preview in the pane along with a text box for you to add any text about your file upload.
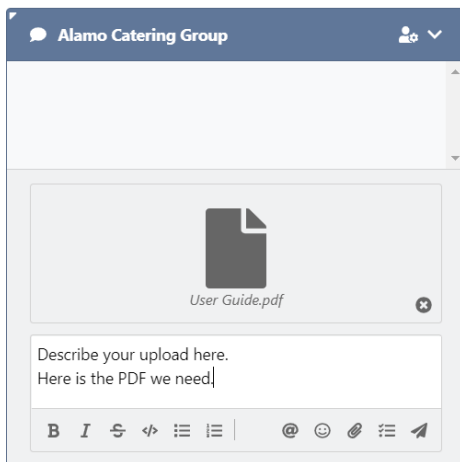
Hit **Enter** or *click* the paper airplane icon to send the message.
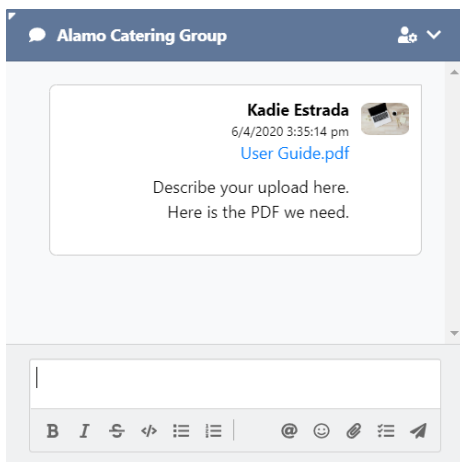
The file will upload to your NetSuite file cabinet.

How to Upload a File with Drag and Drop

Alternatively, you can also open your file manager and drag and drop your file directly into the chat window. To do so:

Click on your file and drag it into the window until you see the dotted border surrounding the chat window and release.

As with use of the file upload button, the file will preview in the pane along with a text box for you to add any text about your file upload.

Hit **Enter** or click the paper airplane icon to send the message.

The file will upload to your NetSuite file cabinet.

Thumbnails of Graphic Files

Add a graphic file with the same steps as uploading any other file type.
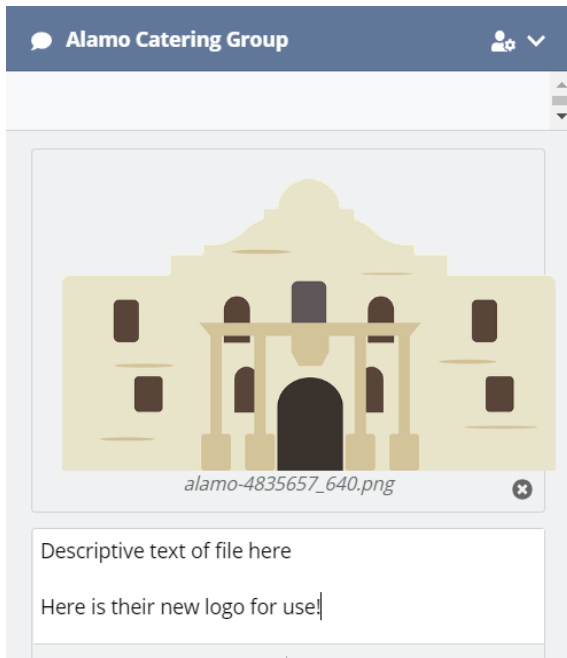
Uploading of a graphic file will display a thumbnail of the file inside the chat stream.
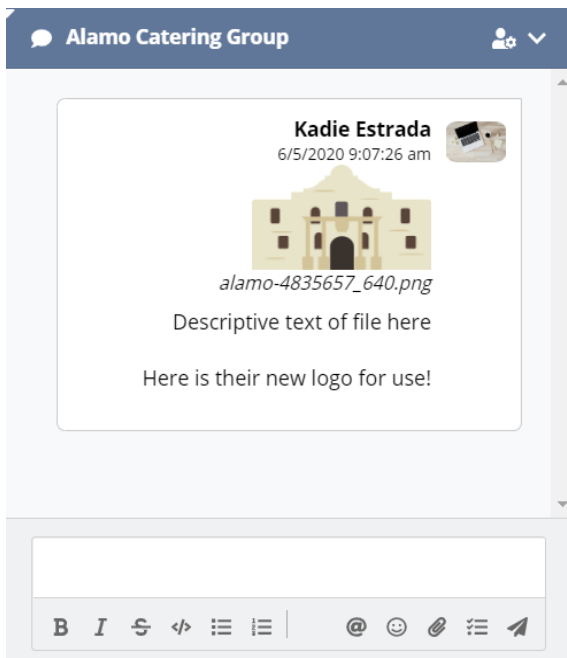
The file will upload to your NetSuite file cabinet.

Note: files uploaded are tied to the current record. Discretion should be used when uploading any file with regards to users who have access to the record used for the chat.

How to create, assign and schedule a task

To assign a task from within bluChat, click the **Create Task** button located below the text input box.
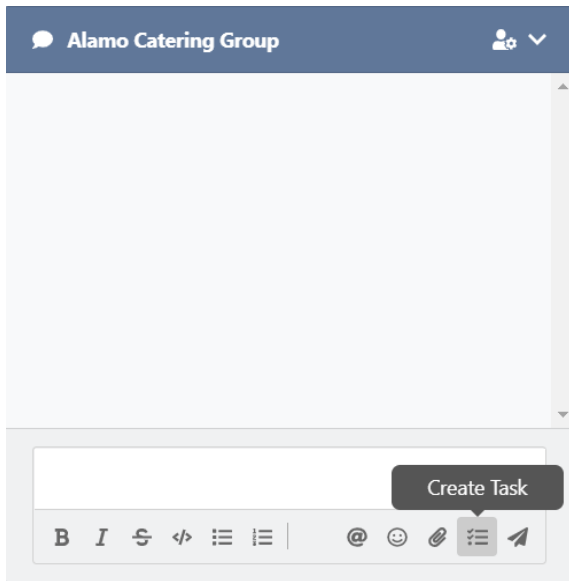
Enter the title of your new task, add any task details, assign a due date with the calendar button, and choose an assignee from the drop down; all from within bluChat.
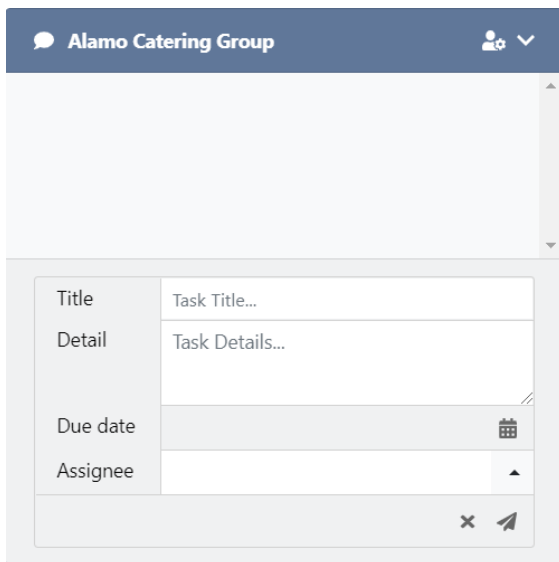
Click the paper airplane button or hit **Enter**.

Because bluChat is contextual, your new task is now assigned to your current record.

In this example, the user has been assigned a task within bluChat. Click on the checklist icon to open the task details in stream.
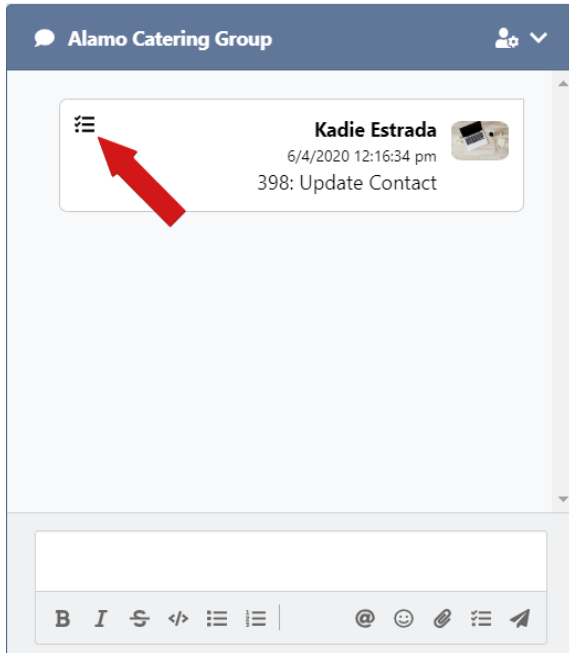
The newly created task is linked in bluChat to the assignee, task, and record.
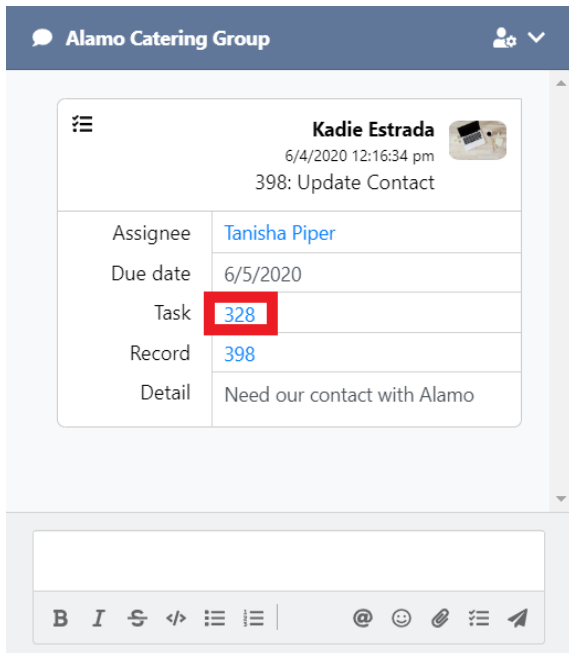
Clicking on the task in bluChat will link to the newly created task.

Task 🔍

398: Update Contact

Edit   Back | 🖨   ➕▾   Actions ▾

Primary Information

TITLE
398: Update Contact

ASSIGNED TO
Tanisha Piper

☐ NOTIFY ASSIGNEE BY EMAIL

Date and Time

START DATE
Thursday June 4, 2020

DUE DATE
Friday June 5, 2020

DATE COMPLETED

The assignee is notified of the new task.

Tasks

TOTAL: 1   VIEW   Dashboard   ▼   QUICK SORT   Due Date   ▼

New	Edit | View	Due Date ▲ ✎	Task Title
	✎ ◉	6/5/2020	398: Update Contact

How to tag a user

In the text input box, type **@** or click the **@** button and a list of taggable users will appear.

Select the user you desire to tag by clicking on the desired user name.
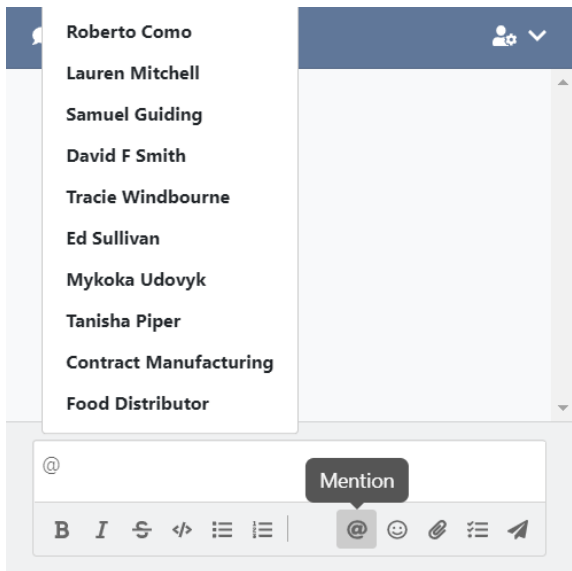
Type **@** and continue typing the desired user name to further refine results.

When you tag a user in bluChat, the tagged user will receive an email notification that they have been mentioned in a chat message.

If partner, vendor, and customer user access has been granted, you may tag these user types in bluChat. For more information on extending bluChat to partner, vendor, and customer users see How to extend bluChat to partners, vendors, and customers.

Note: Tagging a user who is not authorized to access the record will still send an email notification, but will not grant the user access to the record. For record permissions talk with your NetSuite Administrator.
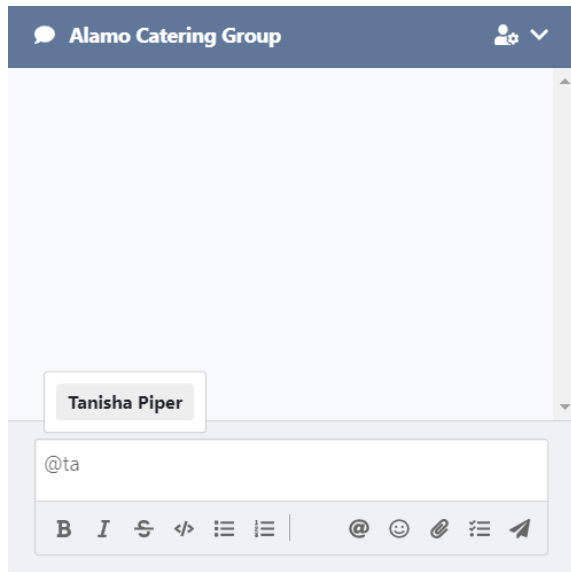
How to remove a message from the chat stream

Chat messages may be deleted out of the chat stream by the user who created the message.

To remove a message from the stream, click on the circled X in the corner of the chat message.
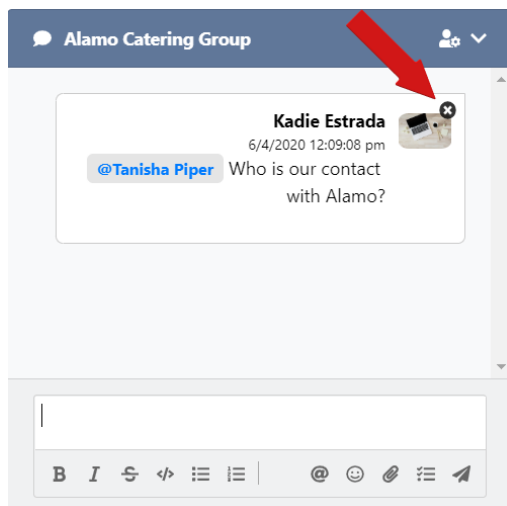
How to reply to a message

To reply to a user's message, click the **Reply** link at the bottom of the message.
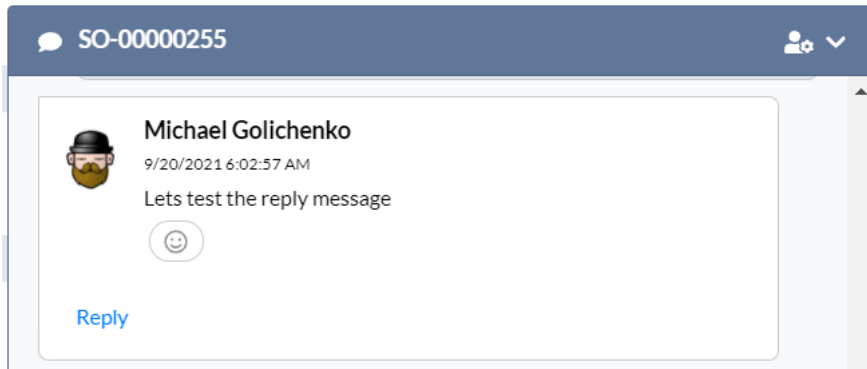
This will display the message entry editor.
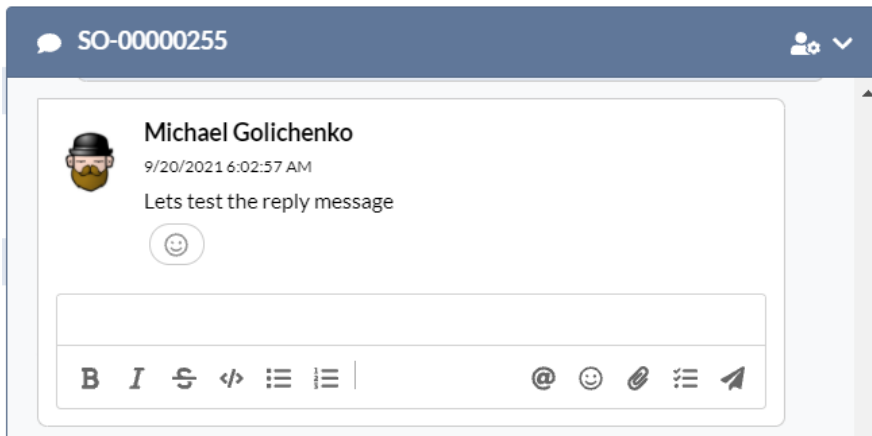
Create a reply message and click send. The message will appear under the original message.
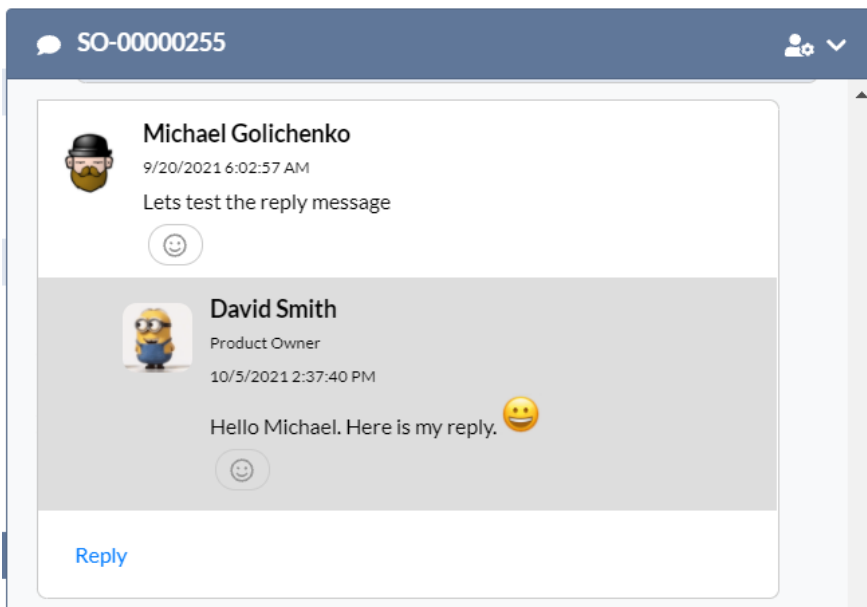
Additional replies can be created by any user and will be displayed in chronological order.

How to react to a message using an emoji

Users can react to messages using emojis by clicking on the emoji reaction icon.
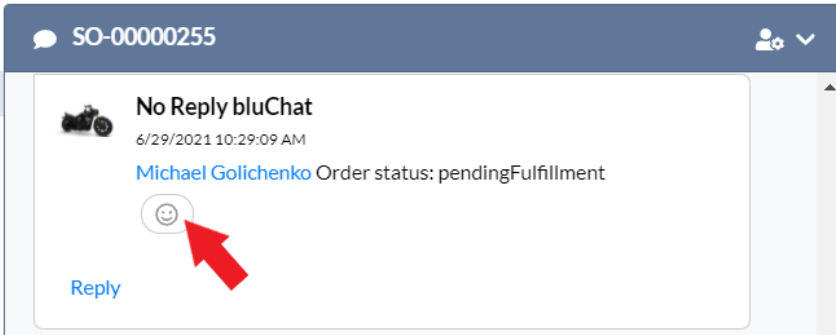
Select an emoji from the popup window. The reaction should show up under the message.
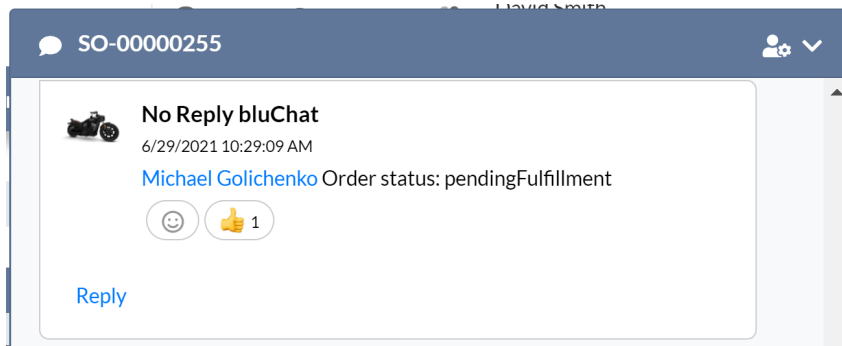
Clicking the same reaction emoji will remove the user's reaction of that emoji. It will not remove other user's reactions.

Multiple reactions can be provided for the same message.

Hover over the reactions to see a list of user names that reacted with the same emoji.
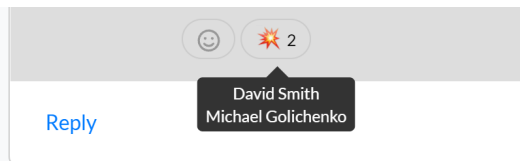
User Profiles

Users may choose to use a unique profile picture and post a brief bio statement through a bluChat user profile.
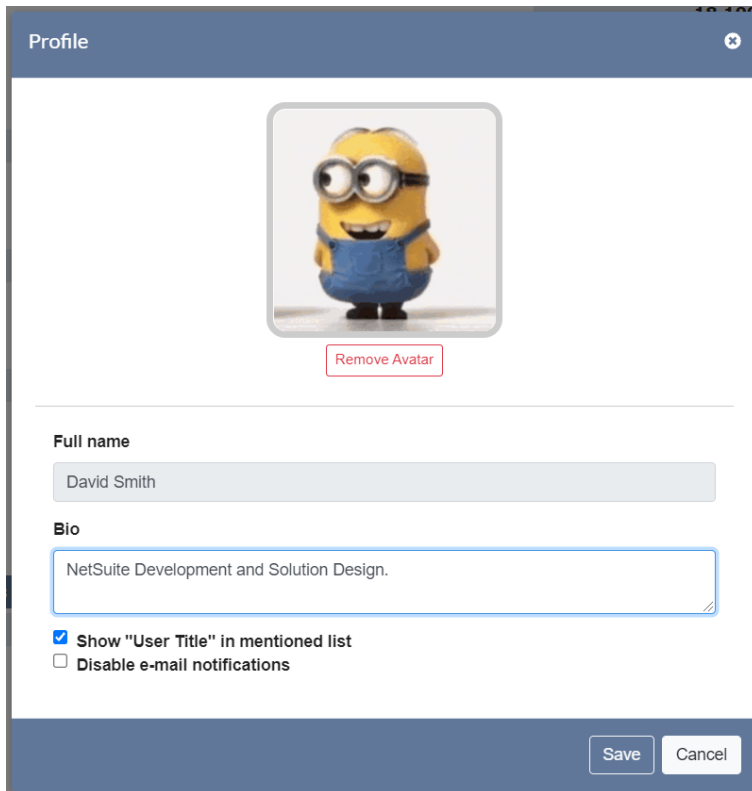
To create a profile, click the personal settings icon on the top of the chat window.
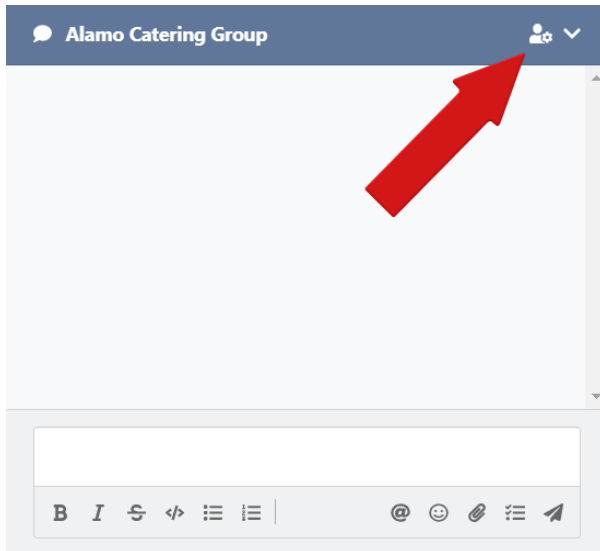
In the pop up window, click the **Edit Profile** button.
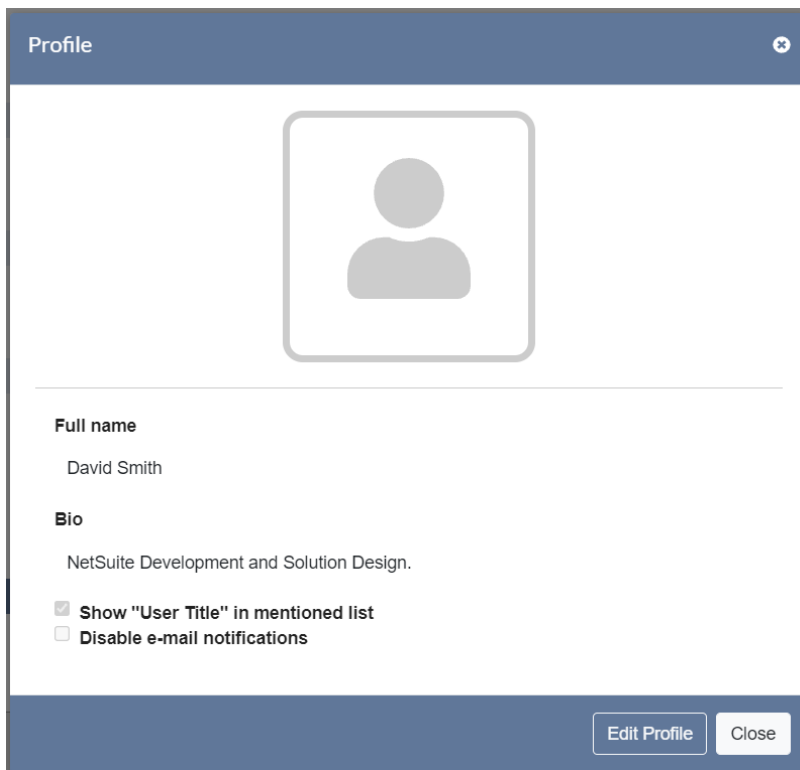
In edit mode, click the large person icon to upload a profile picture and write a brief description for your bio. Full name is populated from your user record.

Clicking the checkbox **Show "User Title" in mentioned list** will display the user's job title from the user's associated employee record in the mentions list.
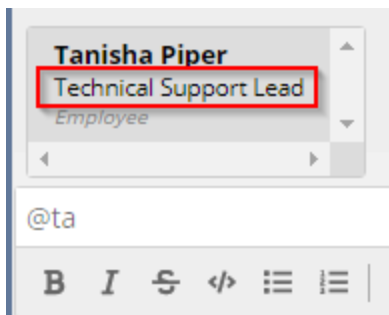
Clicking the **Disable e-mail notifications** will prevent this user from receiving bluChat emails from the system.

Once your profile is set as you want, click the **Save** button.

Your profile picture will now appear next to your messages in the chat window.

Clicking on your profile picture or another user's profile picture in the chat stream will display the respective user's profile.

Chat Text Formatting

The text of messages may be formatted by clicking the **Bold**, **Italic**, **Strikethrough**, and **Code** buttons.
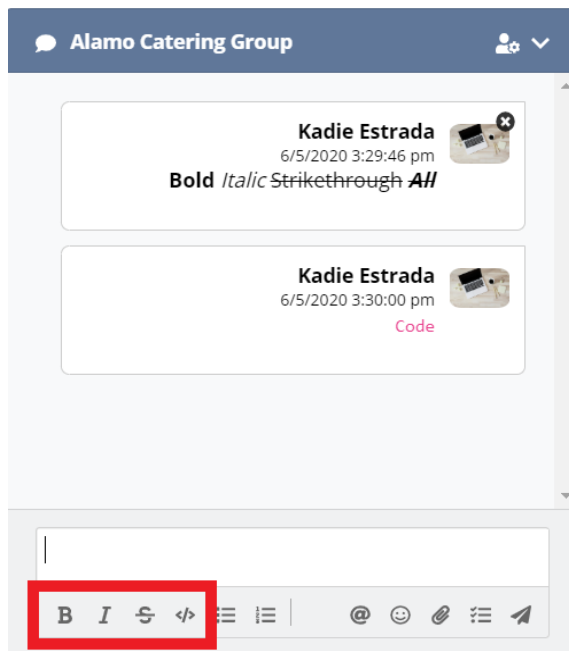
Bold, italic, and strikethrough formatting may be used in any combination.
Code may be used for the sharing of code snippets in the chat stream.

Bulleted and Ordered Lists

To create a bulleted or ordered list within the chat stream, click on the respective button below the text input box.
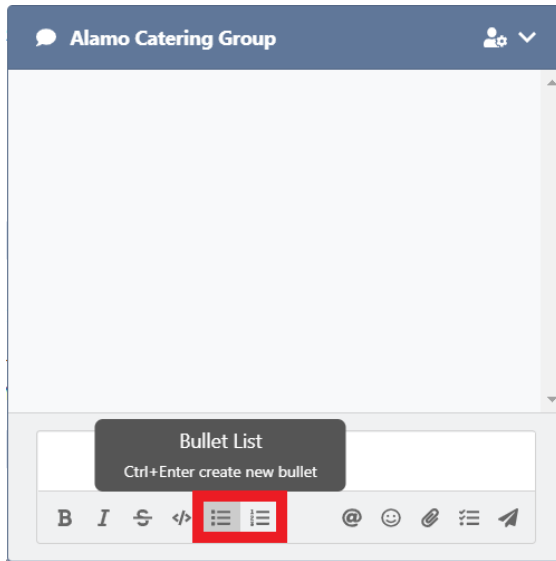
For both types of lists, use **Control+Enter** to create a new bullet or ordered list item.
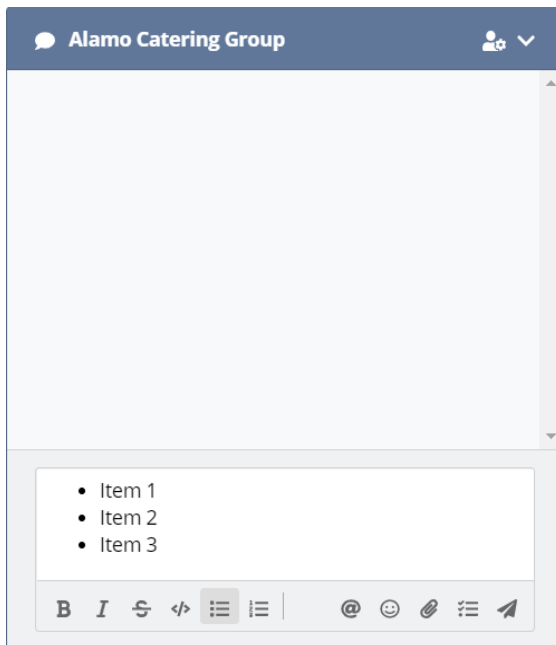
Hit **Enter** or click the paper airplane button to post your list as a chat message.
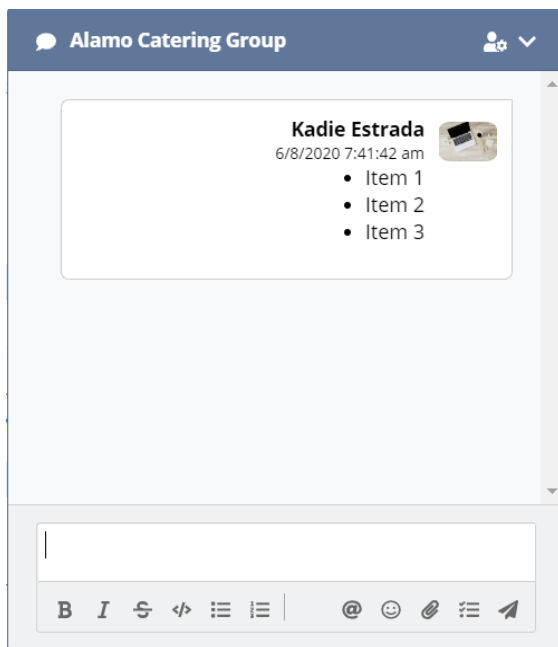
TIP: To enter more text after the list, use Control+Enter after your last list item and then click the list icon again.

Use of Emojis

To use emojis in your chat messages, click on the emoji button below the text input box or type **:** (colon).
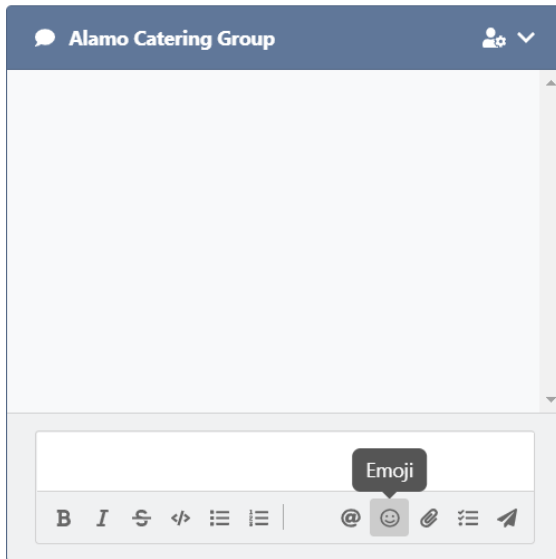
From the drop down menu, select your emoji or search in the emoji search box to find an emoji from the library.
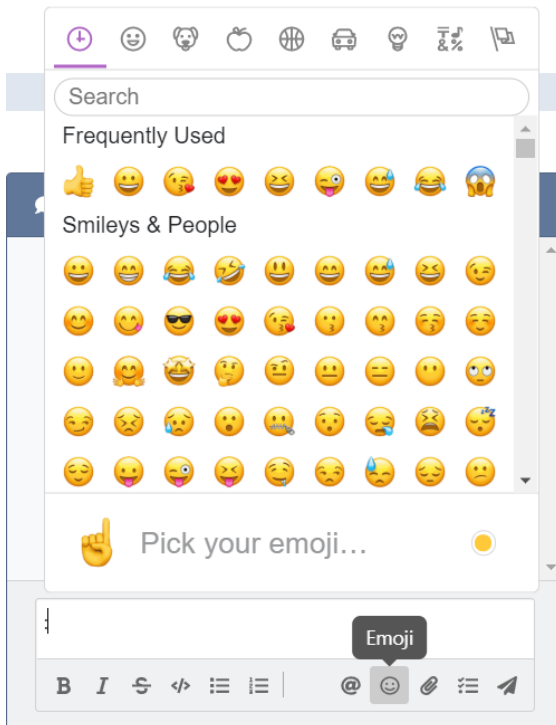
bluChat Channels, Groups, and Direct Messages

On the bluChat Messages page, users have the option to chat in channels, groups, and direct messages; outside of records but still within NetSuite. Channels are "public" meaning anyone can search and join; groups are two or more users in a private conversation and can be named; direct messages are one to one conversations.

NOTE: Messages can be searched and audited, and therefore are not "private".

Channels

Channels are "public", meaning that any user can create, search and join a channel.

Creating a New Channel

To create a new channel, click the plus circle button next to channels in the left sidebar.
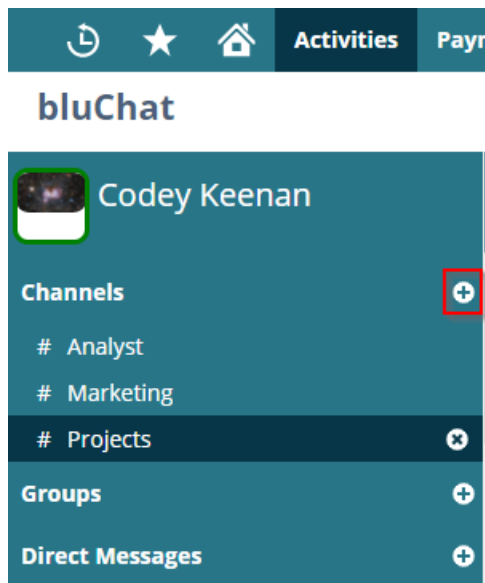
In the pop up window type the new channel name in the text box.
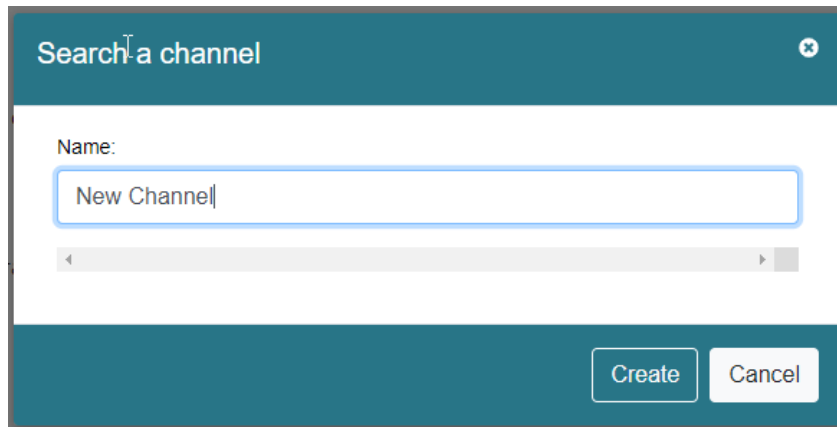
Click **Create**.

The new channel is now visible in the sidebar.
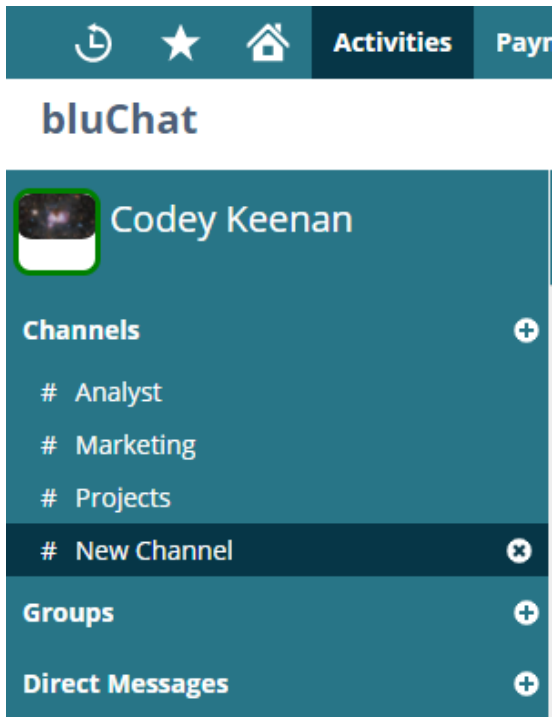
Adding Members to a Channel

To add new members to a channel, in the header of the channel, click on the invite members icon.

In the pop up, begin to type the name of the user you would like to add. The list populates user names consistent with the characters typed, much like the mention function in the record chat window.
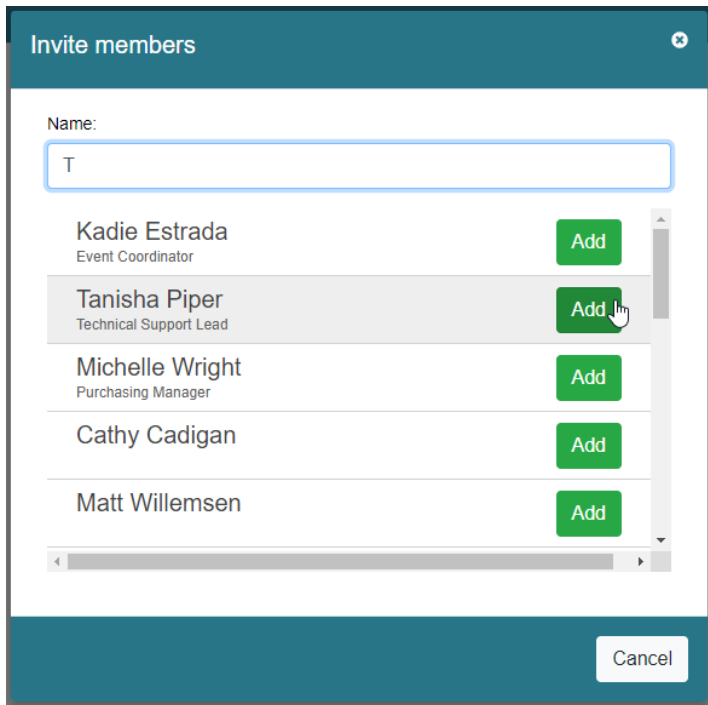
Click the **Add** button next to the name(s) of the user(s) you wish to add to the channel.

Once you have selected the user(s) you wish to add, click the **Invite** button on the pop up to add them to the channel.
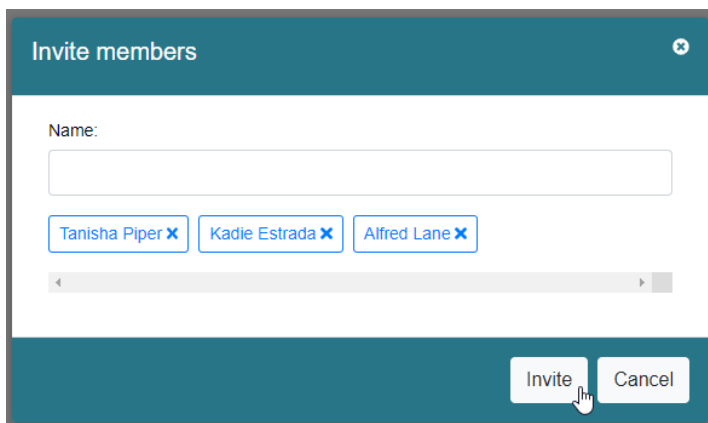
Removing Members from a Channel

To remove a member from a channel, in the header of the channel, click on the text with the amount of members.
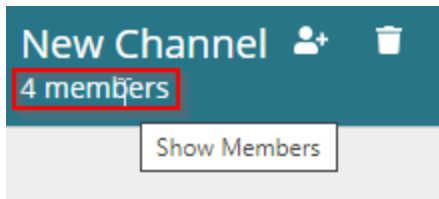
In the pop up, click **Remove** next to the member(s) you wish to remove.
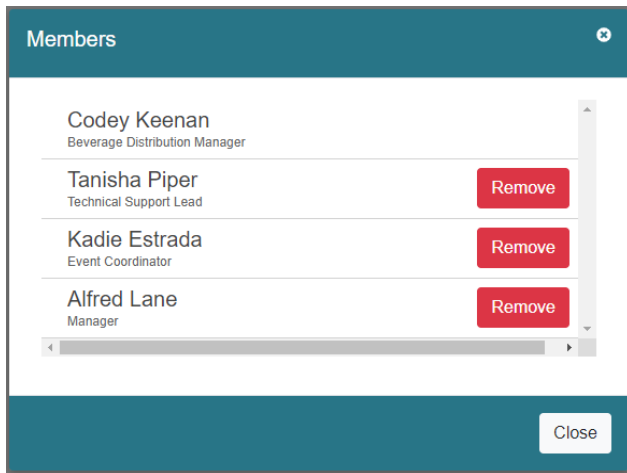
The member(s) will be removed from the list.

Note: the creator of the channel cannot be removed from the channel. Inactive or deleted entities are automatically removed from the channel when adding/removing other members.

Deleting a Channel

To delete a channel, in the header of the channel, click on the trash can icon.
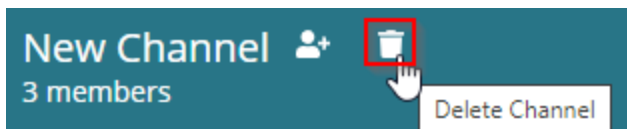
On the warning pop up, click the **Confirm** button to delete the channel.
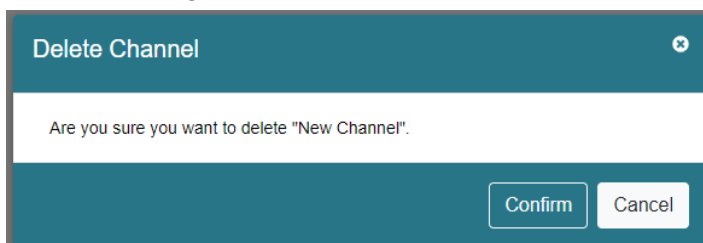
Note: only Administrators or the channel's creator can delete a channel.

Joining an Existing Channel

To create a new channel, click the plus circle button next to channels in the left sidebar.
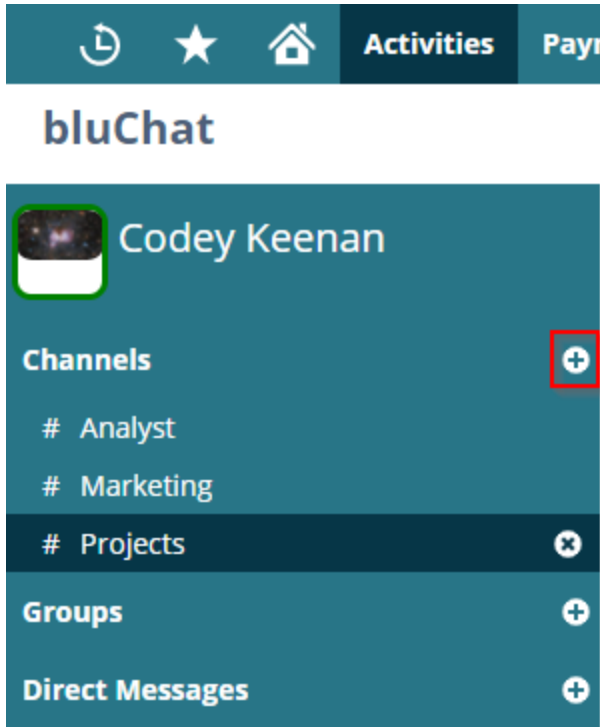
In the text box, begin typing to display a list of channels that include the typed character(s).
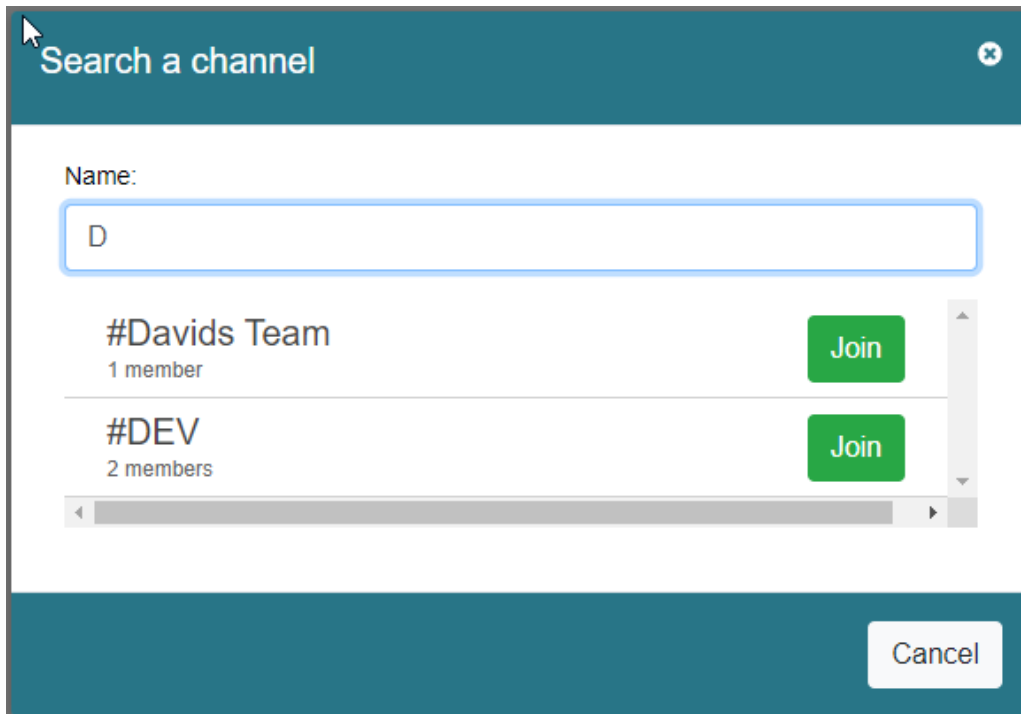
Click **Join** to join the selected channel.

Groups

Groups are two or more users in a private conversation that other users can join only by invitation. Groups can be named similar to a channel.

Creating a Group

To create a new group, click the plus circle button next to groups in the left sidebar.

Add members to the group by typing characters into the text box to find users whose name matches the characters typed.
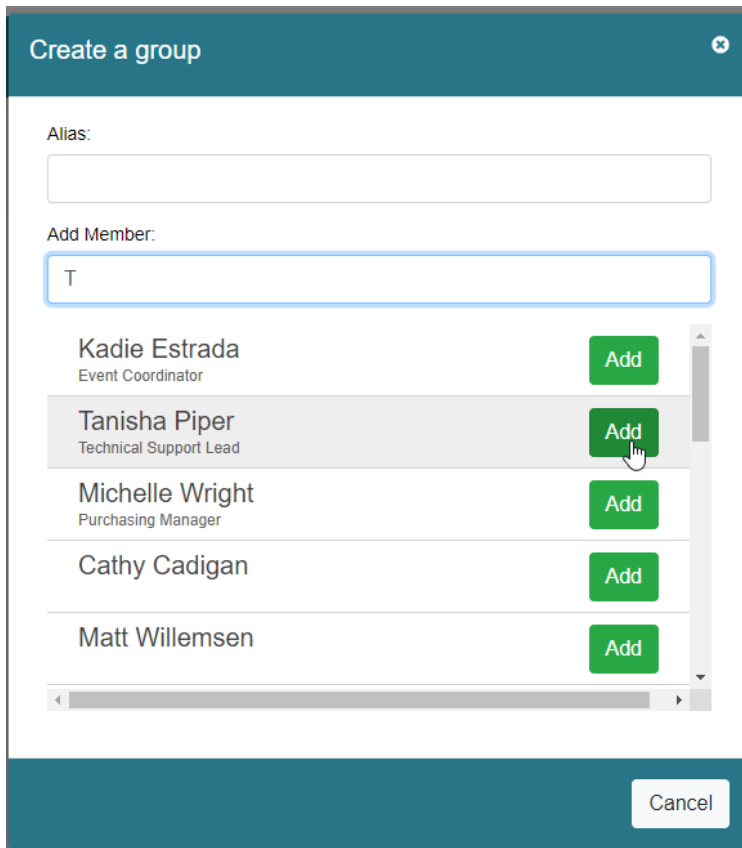
Click **Add** to add the user to the group.

Search for and add any desired additional users.

You can name your group by typing a name in the Alias text box.

Click **Create** to create the group.

Adding Additional Users to a Group

To add new users to a group, in the header of the group, click on the invite members icon.
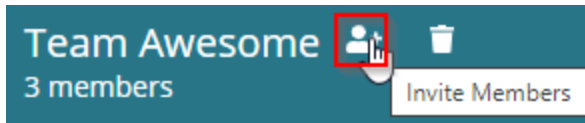

In the pop up, begin to type the name of the user you would like to add. The list populates user names consistent with the characters typed, much like the mention function in the record chat window.
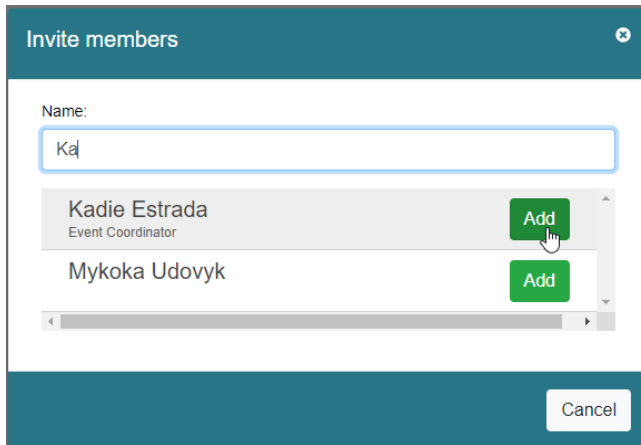

Click the **Add** button next to the name(s) of the user(s) you wish to add to the group.

Once you have selected the user(s) you wish to add, click the **Invite** button on the pop up to add them to the channel.
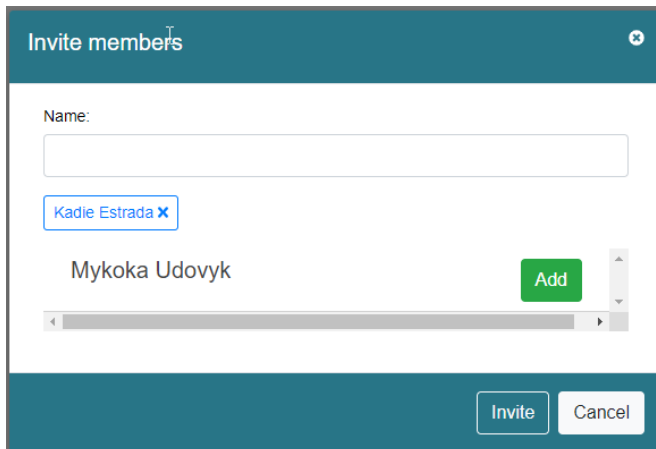
Removing Members from a Group

To remove a member from a group, in the header of the channel, click on the text with the amount of members.
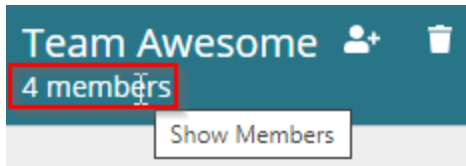
In the pop up, click **Remove** next to the member(s) you wish to remove.
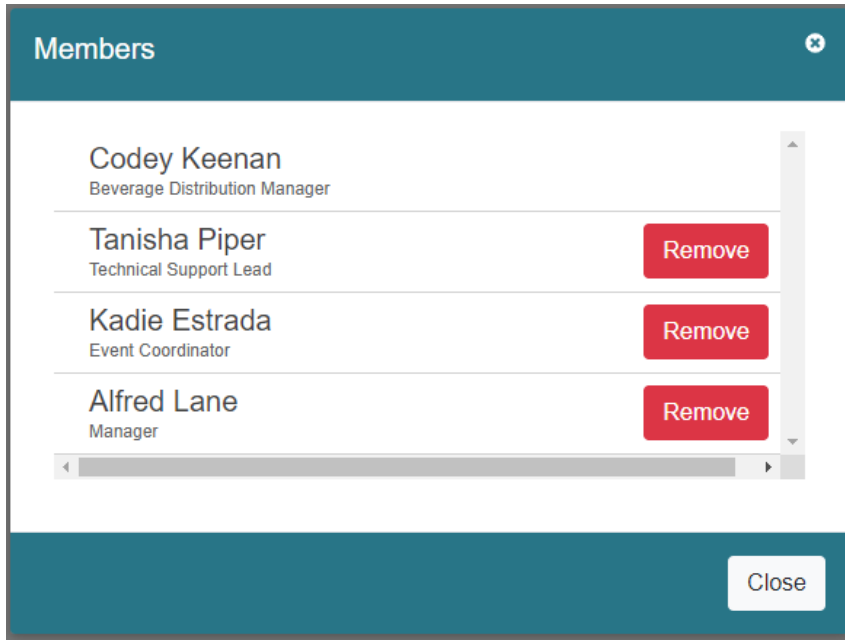

The member(s) will be removed from the list.

Note: the creator of the channel cannot be removed from the group.

Deleting a Group

To delete a group, in the header of the group, click on the trash can icon.
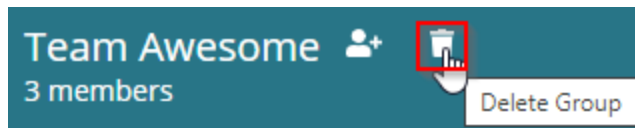

On the warning pop up, click the **Confirm** button to delete the group.
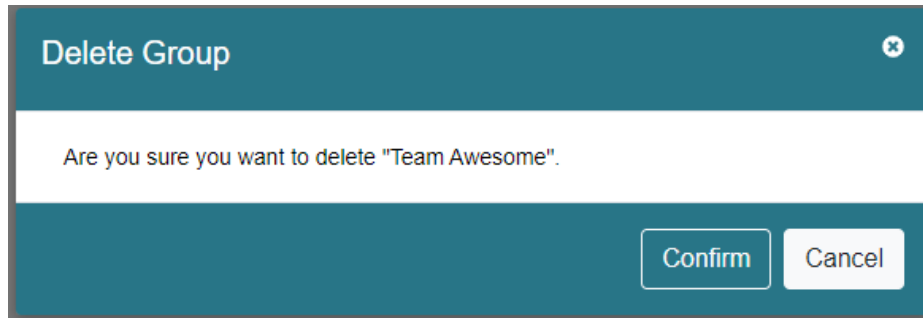
Note: only Administrators or the group's creator can delete a group.

Direct Messages

Direct Messages are a one to one "private" (not joinable by other users) conversation between users.

Creating a Direct Message

To create a new direct message, click the plus circle button next to Direct Messages in the left sidebar.
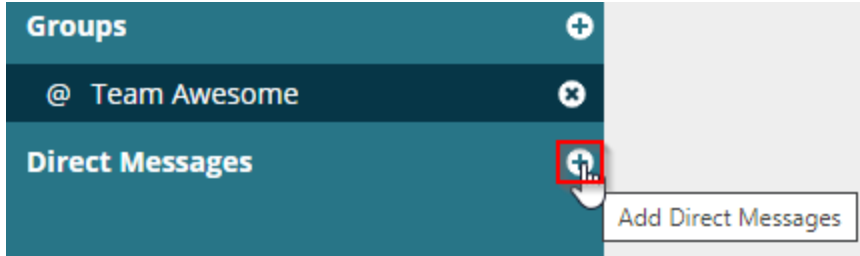
Add a user for a direct message by typing characters into the text box to find a user whose name matches the characters typed.
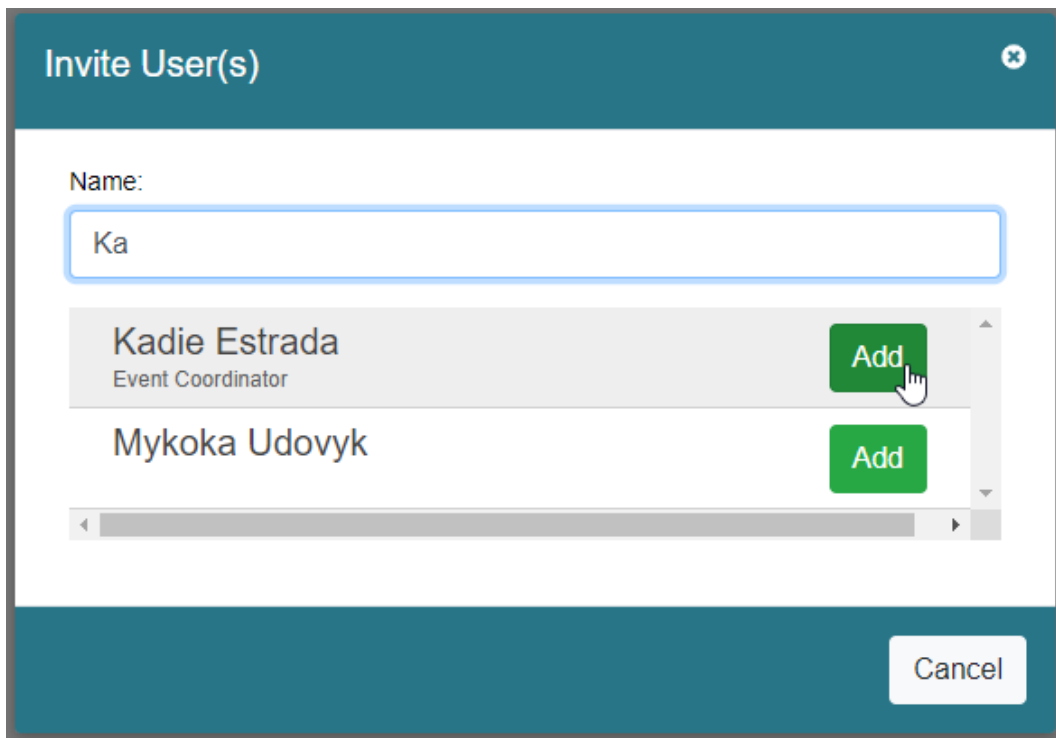
Click **Add** to add the user.

Click **Create** to create the direct message.

Advanced Features of bluChat

These advanced features will need to be configured by an Administrator.

Working with Email Templates

How to access email template customization

The default email template will be sufficient for most email notifications.

Email notifications can be customized for record types in addition to using the default template.

To access this feature, go to **Setup**>**Custom**>**bluChat Config**.

Select **Email Templates** from the large drop down menu.

Deployments	Email Templates	Mentions	Settings
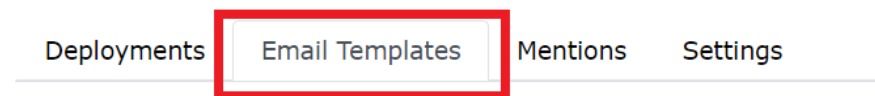
Using the default template sends an email that will notify the tagged user of their mention in bluChat.

Recipients	**Message**	Attachments	Read Receipts

SUBJECT
You were mentioned in Contact Gary Tucker

MESSAGE
Dear *Kadie Estrada*,

You were mentioned by *Tanisha Piper* in Contact Gary Tucker with following message:

> Kadie Estrada is the email address correct on this contact?

Kind regards,
SS Pure Food & Bev 2018.2 Version 1.3

Reply	Reply to All	Cancel		Preview

How to create an email template

Click **Add** to add a new email template

The **name field** is used to uniquely identify the template and has a structure which provides information on what record to apply the template. All names are prefixed with **chat.mention.**, followed by a specific record ID or **default**.

NOTE: When using a specific record ID, the template will ONLY be used for that specific record. All other records of the same type will look for the default.

If no record specific template is found, bluChat will fall back to the first available, non-record specific template.

You can choose which record to mention within the notification from the second drop down menu.

After adding your subject line, format and type your text and click **Save**.

Copy from template:
chat.mention.default ▾
Load

Name
chat.mention.invoice. | default

Record
Invoice ▾

Subject
You were mentioned in ${record@title} ${data.record.entityid.text}

Content HTML

↶ ↷ **B** *I* U ≡ ≡ ≡ ≡ ⋮≡ ⋮≡ ⇤ ⇥ 12pt ▾ A ▾ 🖊 ▾ Tₓ <>
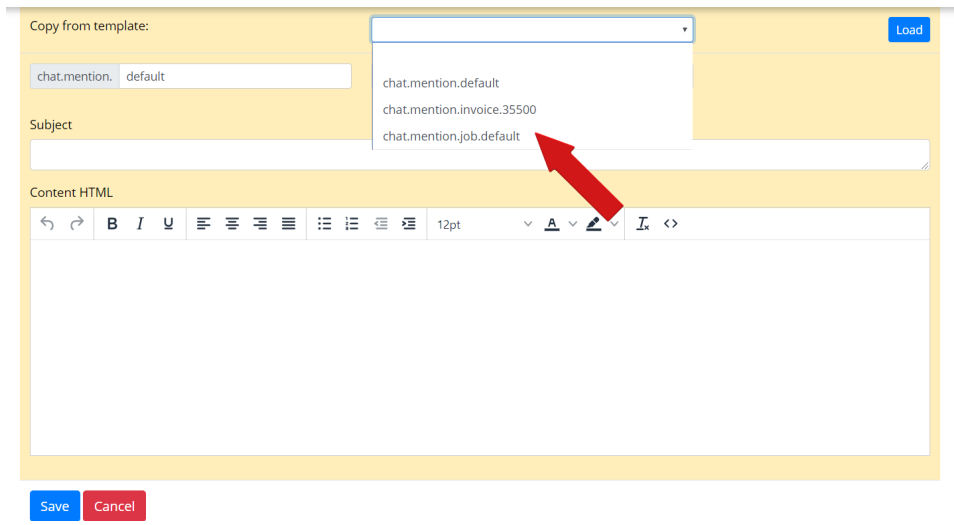
Dear *${data.mentioned.fullname}*,

You were mentioned by *${(data.by.user.fullname?has_content)?then(data.by.user.fullname, data.by.record.entityid.text)}* in ${record@title}
${data.record.entityid.text}
with following message:

${data.message}
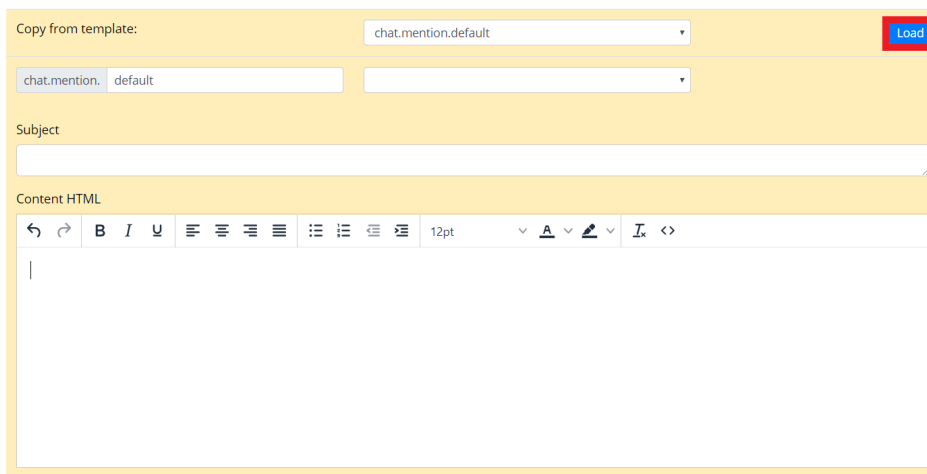
How to create an email template from an existing template

When adding a new template, you can choose to begin by copying from an existing template from the drop down menu.
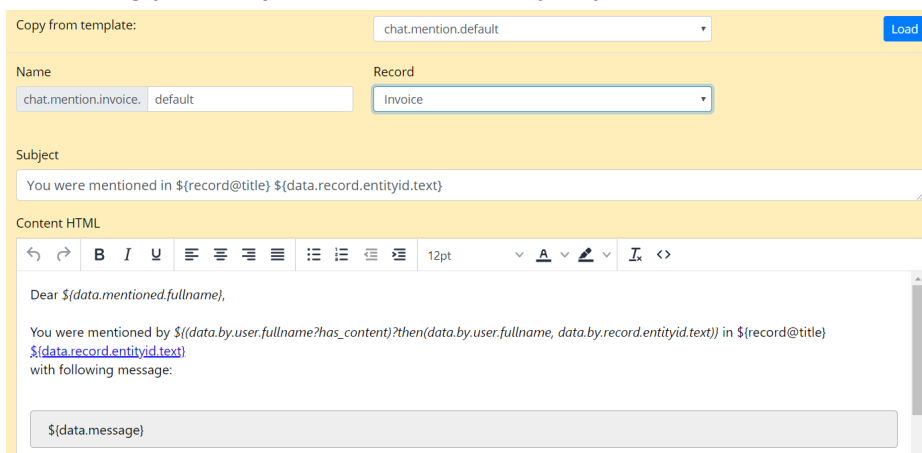
Click **Load** to load a copy of your selected template for editing.

After editing your subject line, format and type your text and click **Save**.

How to work with an existing email template

There are several options to further work with and customize email templates.
To do this, go to **Setup**>**Custom**>**bluChat Config**.
Select **Email Templates** from the large drop down menu.

Preview

You can preview an email template inline by clicking the green **Preview** button.

This will display a preview of the selected email template.

Edit

You can edit an email template by clicking the **Edit** button.

This will allow you to edit the selected email template directly inline.

Remove

You can delete any custom email templates by clicking the template's corresponding **Remove** button.

Advanced Email Template Features

Editing Template HTML source code

You can also edit the HTML source code for the email template directly by clicking the **Source code** button on the formatting menu.

This opens a new box for editing and inputting HTML source code.

Click **Save** to save your HTML changes.

Use of meta tags within an email template

To make mention notification emails flexible and dynamic, you can use meta tags to populate dynamic data. The following root objects are available to be used in the **Subject** and **Content HTML** fields: *data, record* and *companyInformation*.

The ***data*** object contains these properties: *message, mentioned, by* and *record.*

- ***message*** contains the actual chat message for the person who was mentioned and to whom the email will be sent.
- ***mentioned*** contains the mentioned user's *record* property, containing all of the properties from the mentioned user's entity record (i.e. employee, contact, partner, customer, or vendor). By creating a join to the mentioned user's entity record, the email may source fields about the mentioned person and can be used in the following way `${data.mentioned.record.entityid}` This example will source the mentioned entity user's entityid field.
- ***by*** contains the tagging user's *record* property, containing all of the properties from the tagging user's entity record (employee, contact, partner, customer, or vendor). By creating a join to the tagging user's entity record, the email may source fields about the tagging person and can be used following way `${data.by.record.entityid}` This example will source the tagging entity user's entityid field.
- ***record*** contains all the properties from the record on which the mentioning happened and can be used in the following way `${record.name}`. This example will source the template base record's name field. This is also an alias for the ***data.record*** object. (i.e. `${record.name}` is equivalent to `${data.record.name}`)

companyInformation contains all of the properties from the **Company Information** page in NetSuite.

Using an Email Template for a Specific Record

Mention notification email templates may also be set for a specific record by using a record's internal id in the template field rather than "default." In this example, custom record mentions for the "FAM - Asset" record will default to use one template, while the record with an internal id of "153" will use a separate template.

bluChat Configuration

For any bluChat questions or support, contact bluchat@blubanyan.com.

To purchase bluChat, visit https://shop.blubanyan.com/.

Deployments	Email Templates	Mentions	Settings

Name	Record		?
chat.mention.customrecord_bluchat_channel.default	bluChat Channel	Preview Edit Remove	
chat.mention.customrecord_ncfar_asset.153	FAM - Asset	Preview Edit Remove	
chat.mention.customrecord_ncfar_asset.default	FAM - Asset	Preview Edit Remove	
chat.mention.default		Preview Edit Remove	
chat.mention.salesorder.default	Sales Order	Preview Edit Remove	

Add

Other Advanced Features

How to set the audience for a record deployment

To set up a select audience for a record deployment an Administrator will need to access the record type's Script Deployment page.
To do this, go to **Setup**>**Custom**>**bluChat Config** and select the **Deployments** tab.

You may click on the **View** and **Edit** hyperlinks for your selected deployment(s) to access their respective Script Deployment page(s). Note that there are separate pages for configuring both View and Edit modes.
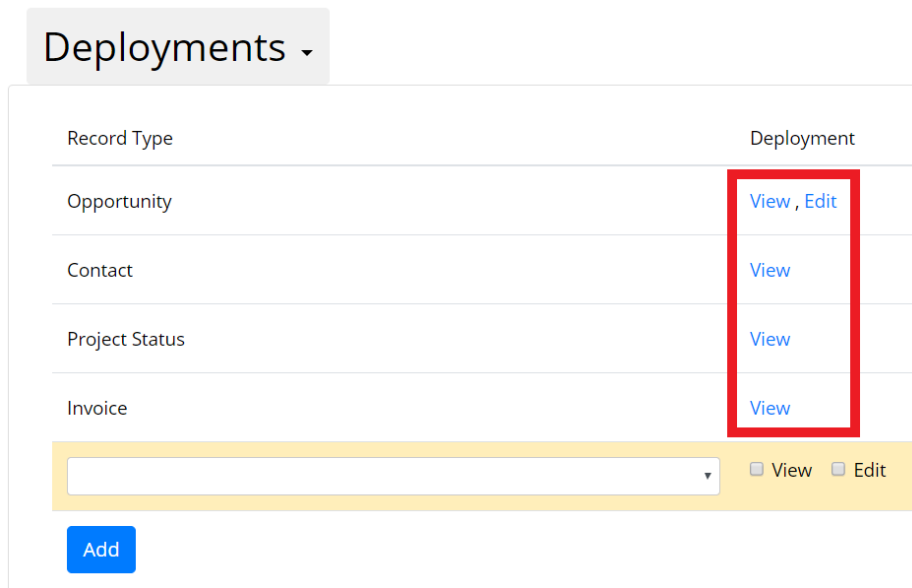
On the Script Deployment page you may further refine how bluChat is deployed within NetSuite,
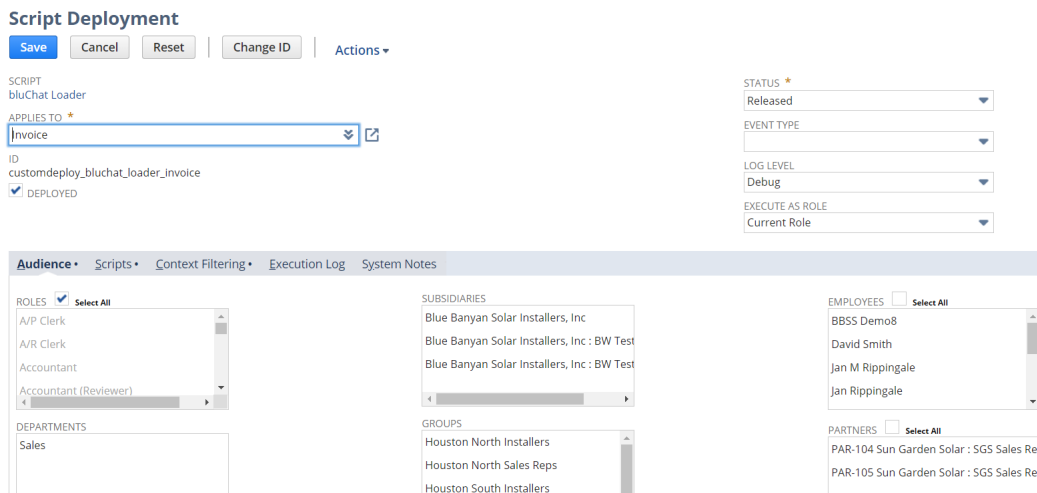
From the Script Deployment page(s) you can restrict access to bluChat based upon user roles, departments, groups, etc.

How to extend NetSuite to partners, vendors, and customers

Partner, vendor, and customer user types can be given access to records within NetSuite. If bluChat has been deployed to these record types, partners, vendors, and customers are available to chat.

To extend user access to partners, vendors, and customers an Admin will need to enable the access features in your NetSuite environment.

After access has been enabled, access may be further refined by setting the audience for chat through the Script Deployment page (see above).

For more information on managing users and granting access to NetSuite, consult the topic in SuiteAnswers within your NetSuite environment (https://netsuite.custhelp.com/app/answers/detail/a_id/9904).

Customer login requirements

In order to allow customers the ability to access bluChat for their records, the necessary customer access feature must be enabled by an Admin within NetSuite.

For more information on configuring customer access, consult the topic in SuiteAnswers within your NetSuite environment (https://netsuite.custhelp.com/app/answers/detail/a_id/9899).

How to automate a chat message with Workflow Action Scripts

bluChat comes with two workflow actions that can be used to send automated messages to the chat stream: **bluChat: send message** and **bluChat: send message to rec**. These custom workflow actions can be used in your workflows to send messages and mentions into the chat stream. Mentions can be to specific users or groups.

The **bluChat: send message** workflow action has three parameters: Message, Message Author, and Mention(s).

Parameters

STORE RESULT IN

FIELD	VALUE
Message	Status Has Changed to Purchasing
Message Author	Kadie Estrada
Mention(s)	Tanisha Piper

In this example, a condition has been set to execute the action when the Prospect Status has changed to Purchasing. Upon execution, the action will send the message from the message author and tag the mentioned user(s).

The **bluChat:send message to rec** workflow action works similarly to send a chat message to a related record. It adds two additional parameters. Parameters for this workflow action are: Message, Record Type (scriptid), Record Internal ID (field.id), Author, and Mention(s).

FIELD	VALUE
Message	
Record Type (scriptid)	customer
Record Internal ID {field.id}	
Author	Current User
Mention(s)	David Jones

VALUE FIELD	FORMULA
▼	'Sales Order '||{tranid}||' is Appr
▼	
▼	{entity.id}
▼	
▼	

In this example, the message is set via formula to include the sales order transaction ID. The chat message is being sent to the related customer record from the current user to the mentioned user David Jones. Note: the record internal ID should be a formula field parameter with the record type's joining field ending in ".id." Refer to the screenshots above.

For more information on workflow action scripts, consult the topic in SuiteAnswers within your NetSuite environment (https://netsuite.custhelp.com/app/answers/detail/a_id/38449).

bluChat Analytics with NetSuite Saved Searches

bluChat comes included with saved searches that can be used to analyze usage.

These included searches can be used to find information such as which users are most using bluChat, which record types are most being used with bluChat, and more.

For more information on saved searches, consult the topic in SuiteAnswers within your NetSuite environment https://netsuite.custhelp.com/app/answers/detail/a_id/8493.

Glossary

Default Employee Record - The default employee record is the NetSuite employee record that is used to send emails from within NetSuite on behalf of outside users. Since partners, vendors, and customers may be able to access your NetSuite environment but cannot send email from NetSuite, this employee record will be used to send mention notification emails on their behalf.

Deployment - A deployment in bluChat means a selected record type which has been granted bluChat functionality. Functionality may be granted to record types in View mode, Edit mode, or both modes.

Mention - When a user is tagged within a chat message, that user will receive an email notification to let them know they have been mentioned in chat for the corresponding record.

Tag - Typing the **@** symbol will bring up a list of selectable users that can be selected, or *tagged*, within a given record's chat window. Tagging a user within bluChat will send the selected user a mention notification.