Conversation – General Functions

① Click Change to perform a workflow action or change the conversation assignee.

② Click Print to open the print dialog for this conversation.

③ Click Remind to send a reminder to a user or users on the conversation. This function is only available to licensed Alden One Pro users.

④ Click Help to view a process diagram of the conversation type.
Conversation – Change Status and Assignee

1. After clicking the Change button at the top of a conversation, the Status/Assign dialog is displayed. Select from the available workflow actions to change the status of the workflow. The selected action to be applied has a light blue icon to the right of the action name. The available actions are dependent upon the current status of the conversation.

2. In some cases, a note is required when performing an action on a conversation. A note can be added even when it is not required.

3. The list of contacts from the conversation are listed. Add a new contact by typing a user's name or email address.

4. Set the new assignee by clicking the desired contact. The selected user to be assigned has a light blue icon to the right of the user's name.
Click the Print option at the top of an open conversation.

A print preview will open in a new browser tab.

Click the arrows at the right of each section header to collapse or expand that section. Only expanded sections will be included in the printout.

Use the browser print function to print the page or Ctrl+P (Cmd+P on a Mac).
After clicking the Remind button on an open conversation, the Conversation Reminder dialog displays.

Choose one or more contacts to which to send the conversation reminder via email. You can also add a new contact to the conversation here, then select that user to receive the reminder.

Type a note to the recipient(s) to let them know what they need to do. This note will be added to the conversation in the notes section.

Choose to parts of the conversation to include in the reminder email – assets, notes, files, and photos.
① Click the Help option at the top of an open conversation. This is different than the application help near the logout button.

② The workflow diagram for this conversation type is opened in a new browser tab. Each conversation type has its own workflow diagram.