

Chainformation Admin User Guide

(Messaging/Chat Module)

Last Updated: May 08, 2025

Welcome to the **Chainformation** user guide. In this manual, we will learn how to manage individual and group conversations in the **Messaging/Chat** module.

Chainformation allows you to keep in touch with your colleagues via instant messaging. You can use the **Messaging** module to send text messages, files and GIFs to your colleagues in individual as well as group conversations. These conversations might help you to share a brief piece of information with your colleagues quickly.

The Messaging module in Chainformation can replace outside apps like; WhatsApp, Slack, Facebook Messenger, Facebook etc. and it is completely integrated with other modules like User management and File/Media library.

Group conversations allow you to share information with multiple colleagues simultaneously instead of typing the same messages again and again or copying and pasting them in multiple chat windows. Moreover, you can also start a group conversation with an individual colleague only. This could help you to categorize the information you share with your colleagues individually. In this way, you can avoid sharing all sorts of information in one long chat window.

Here is a list of all the features of the **Messaging** module that we will discuss in this manual.

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When to Use the Messaging Module?

For short, instant messages to selected individual users and sharing one or two files, you can use the **Messaging** module. However, if you want to share your content with multiple recipients, then you are better off creating a **Post** or **Page** and use **Roles** for sharing instead of starting an individual conversation.

Likewise, you can message your colleagues to ask them to do an urgent task at times. However, you should use modules like **Checklists**, **Forms** and **Tasks** regularly to track and monitor your routine tasks.

Who Can You Message?

The answer to this question depends on your role in your organization and the access rights associated with that role, especially for the **Chat** module. [See the User Guide for Roles](#)

- If a user has been assigned the **Global Chat** right, they can send a message to anyone in the organization and add them in a group conversation.
- If a user has been assigned the **Central Chat** right, they can send a message to colleagues from the locations that are in the same Area as their own location is, e.g within France or Sweden. However, you cannot chat with the people from locations that are not in the same area.
- If a user has been assigned the **Local Chat** right, they can chat with colleagues from their own location only and no one else in the organization.

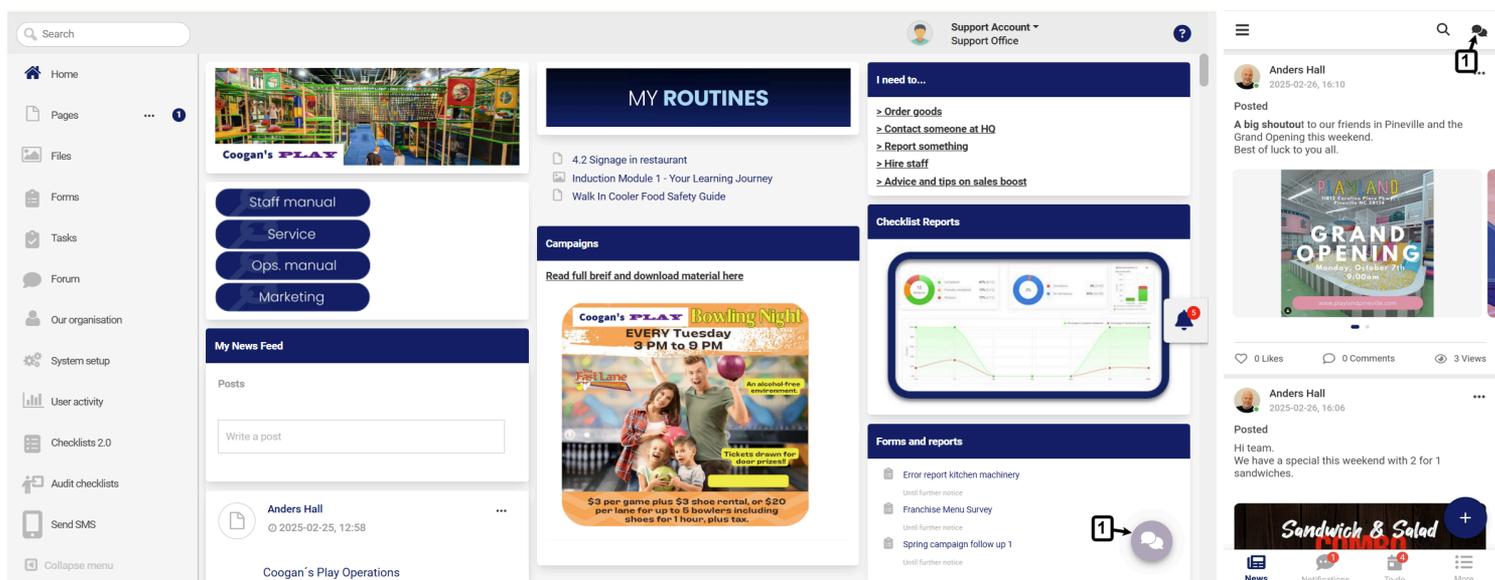
Since the **Messaging** module is not integrated with the **Sharing Selection** feature, therefore, you will have to add all the members manually in a group conversation. Unlike other modules which are integrated with the **Sharing Selection**, you cannot select the members of a group conversation by specifying their roles, units, areas, etc. (This will come in a future upgrade)

Start/Resume a Conversation

Once you have logged in to the **Chaininformation** website platform, then follow these navigation steps to **start a new conversation** with your colleagues or **resume** an already started conversation.

1. Click the **Chat Room** icon in the bottom-right corner of your **Chaininformation** homepage or any other page.

If you are using the **Chaininformation** mobile app to send a message to a colleague, then you can find the **Chat Room** icon in the top-right corner of the mobile app.

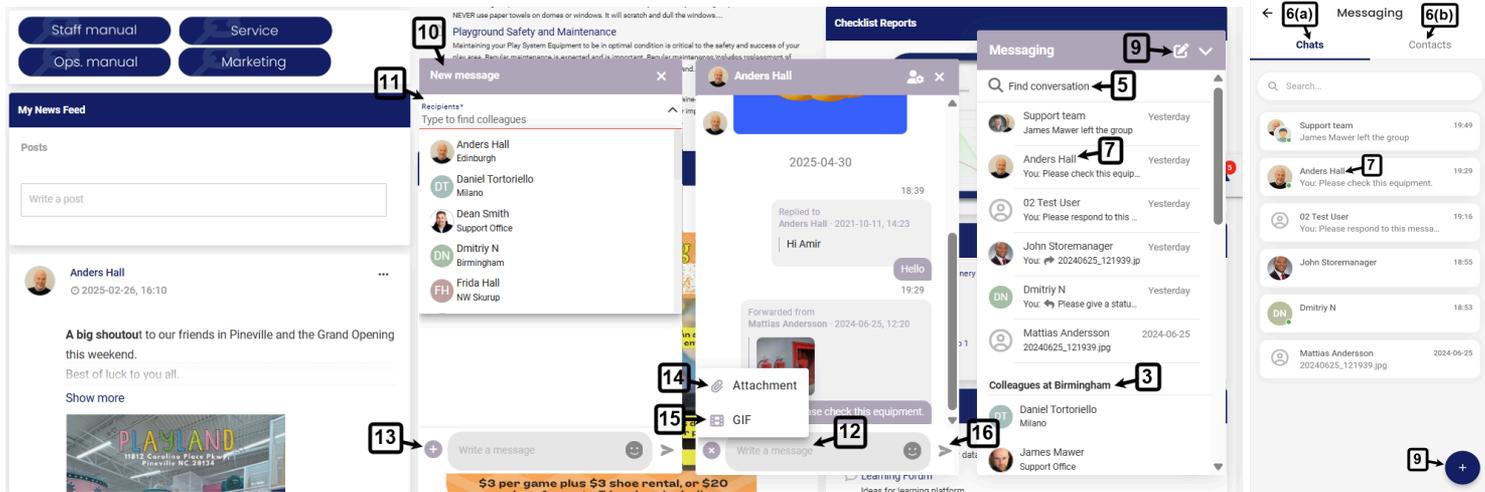


This will open the **Messaging** window where you can start a completely new conversation or resume an already started conversation with a colleague.

2. By default, your previously started conversations are shown at the top of your colleagues' list in the **Messaging** window.

3. Then, it is followed by the names of your colleagues who belong to your current location. [See the User Guide for Locations](#)

Note: If you haven't started a conversation with any of your colleagues yet, then the names of your colleagues from the same location will be shown at the top.



4. You can scroll down the **Messaging** window to see **More suggestions** of your colleagues from other locations of your organization.

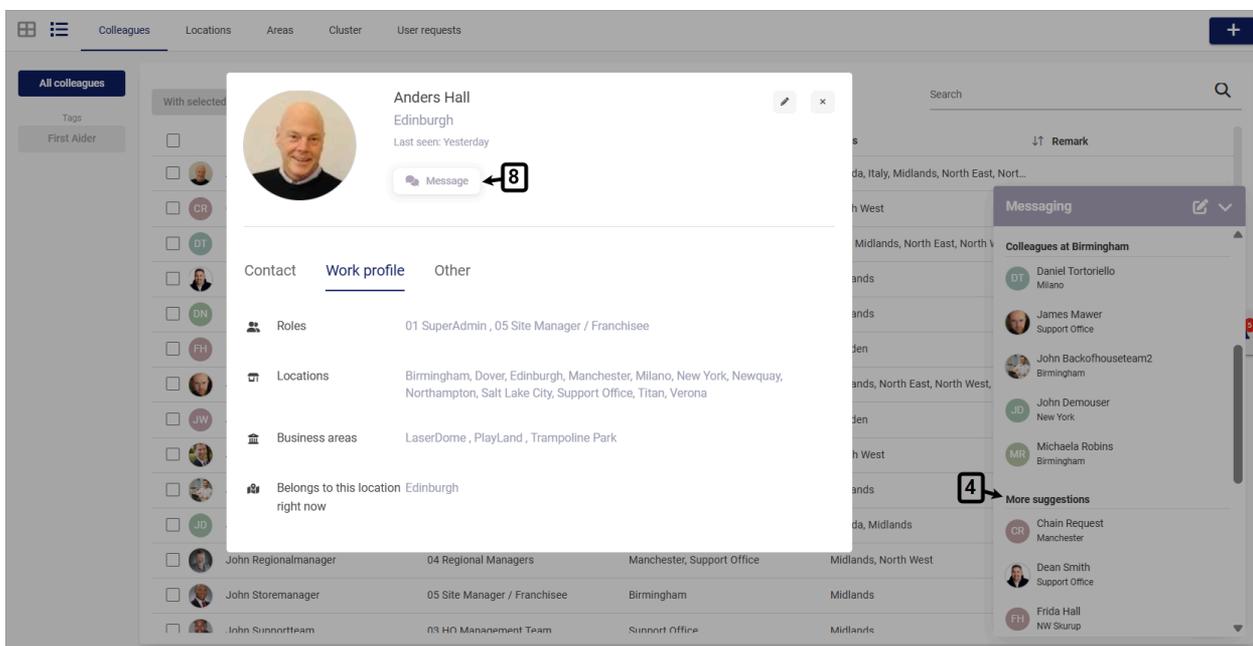
Remember, you will see colleagues from other locations in the **Messaging** list only if you are allowed to contact them. If your role in your organization doesn't allow you to message people from other locations of your organization, then there will be no such category as **More suggestions** in the **Messaging** list. See the User Guide for Roles

5. You can also use the search field to find a new or previous conversation directly, instead of scrolling down the list. See the User Guide for Search

6. Your active conversations are shown in a tab named **Chats** on the mobile app and all available colleagues are listed in another tab named **Contacts**.

7. Now, **click** the name of your colleague who you want to message.

8. You can also open the messaging window with your colleagues by clicking the **Message** button on their profile view dialog in the **Colleagues** tab of **Our organization** page. See the User Guide for Colleagues



9. You can also start a new conversation by clicking the **Pencil** icon in the heading bar of the **Messaging** window on the web or **Add (+)** icon in the bottom right corner of the Messaging page on the app.

10. This will open the **New message** window where you can start chatting with your selected colleagues.

Note: If you or your selected colleague have sent at least one message to each other before, then you will see the name of that colleague in the **Message** window header instead of the **New message** heading.

11. Select a colleague from the **Recipients** dropdown menu on the **New message** window or type the name of your colleague in the **Recipients** field, if you haven't selected a colleague yet.

Note: You can also add more than one colleague in a conversation. See the User Guide for **Group Conversations**

12. In a conversation with your colleagues, you can write a text message and add emojis to it as well.

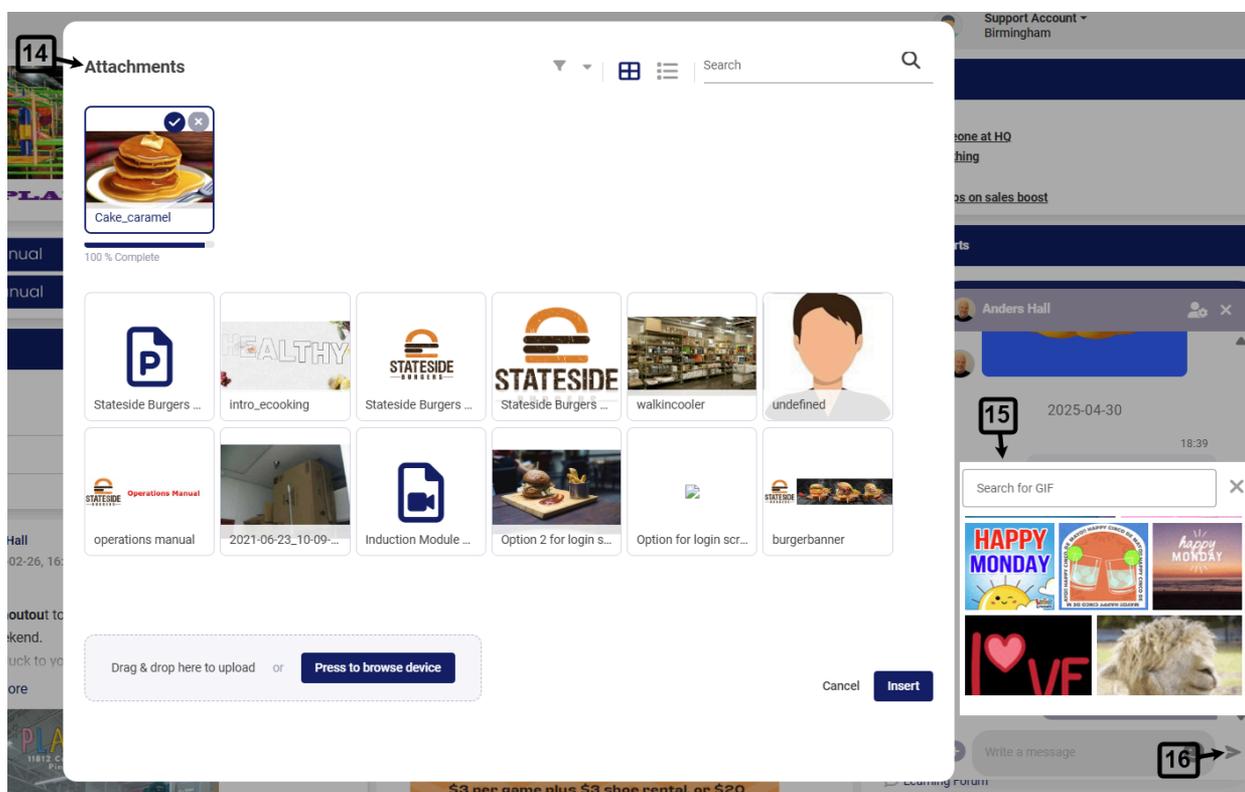
13. You can also send them files or GIFs by clicking the **Add (+)** icon in the bottom-left corner of the **Message** window.

14. You can attach a document or media file with your text message or send them directly by clicking the **Attachment** button from the **Add (+)** menu.

This will open the **Attachments** window where you can upload a file from your computer or **Chaininformation File Manager** and insert it into your message. See the User Guide for **Files**

15. The **Messaging** module of every **Chaininformation** platform is integrated with **GIPHY** (an online collection of GIFs/Stickers) and you can send those images to your colleagues by clicking the **GIF** button from the **Add (+)** menu.

15(a). You can scroll down the list of images or use the **Search** field to find a particular GIF.



16. Press the **Enter** button on your keyboard or click the **Send** icon in the bottom-right corner of the **Message** window to send the message to your selected colleagues.

Manage Messages in a Chat

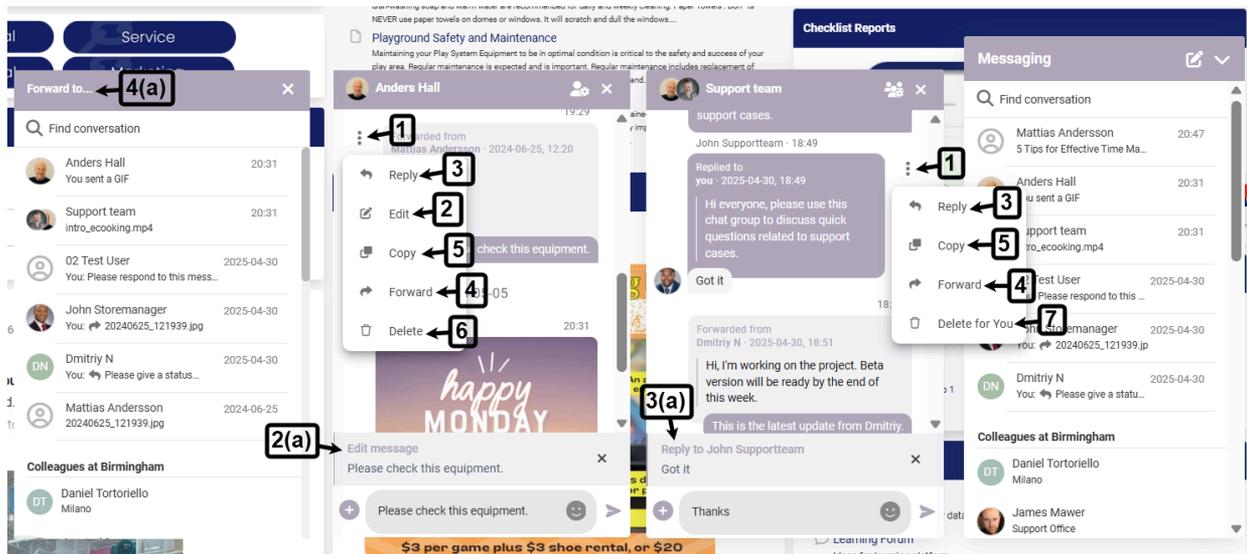
Chaininformation allows you to edit or delete your messages sent in a conversation. You can also quote a message sent by you or a colleague in a reply or forward this message to another chat.

Follow these navigation steps to manage options of a chat message:

(1) Open the relevant conversation and scroll to the message you want to edit or quote.

1(a). Now, hover your mouse over the message (if you are performing this action on the **Chainformation** website platform) and click the three dots (⋮) icon to see the message options.

1(b). Touch and press the message to see the message options if you are performing this action on the **Chainformation** mobile app.



Edit a Text message

2. Click the **Edit** option if you want to edit the message and resend it.

Remember, you are not allowed to edit messages sent by your colleagues. So, you will not see the Edit option for a chat message sent by another user.

Also, you can't edit media files and gifs sent in a chat conversation. So, you will not see the Edit option for a media file or gif even if it's sent by you.

2(a). Make necessary changes and press the **Enter** button or click the **Send** icon to send the edited message to your selected colleagues.

2(b). An (edited) tag will be added to the message from now on and all the participants in the conversation can see it.

Add Reply to a message

3. Click the **Reply** option for a message to quote this message in a reply.

3(a). Add some other text (if required) and press the **Enter** button or click the **Send** icon to send the quoted message to your selected colleagues.

3(b). You or your colleague can click on a quoted reply to scroll to the original message in the chat.

Forward a message to another conversation

4. Click the Forward option for a message to forward this message in another chat.

4(a). This will open the "**Forward to**" list where you can click the conversation in which you want to send this forwarded message.

This will open the chat window for the conversation in which you are trying to forward this message.

Note: You can also forward a message to the same conversation by selecting it from the "Forward to" list.

4(b). Add some other text (if required) and press the **Enter** button or click the **Send** icon to send the quoted message in the selected conversation.

Copy a Text message or an Image file

5. Click the **Copy** option if you want to copy text or image file from a message.

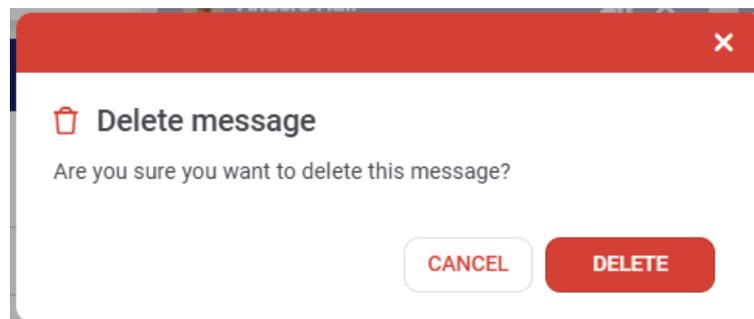
Now, you can use the copied text or image to insert in another chat message, text/media widget on a document, News post, comment, etc. on your Chainformation platform. You can also use the copied item from a chat message on a relevant place on the internet or your computer, mobile phone.

Note: You can only copy text and images files from the Chat module. So, you will not see the Copy option for video files, documents, gifs, etc.

Delete a Chat Message

6. Click the **Delete** option if you want to delete the message.

6(a). Click the **DELETE** button from the confirmation dialog to delete the selected message.



This will permanently delete the message from the conversation and all the participants will see the “You deleted this message” label instead of it.

Note: You can’t delete messages sent by your colleagues in a chat. So, “**Delete**” option is not available for messages sent by other users.

7. Though, you can click the “**Delete for you**” option for a message sent by your colleague that deletes this message for you but other participants in the conversation still see it.

Manage Conversation Settings

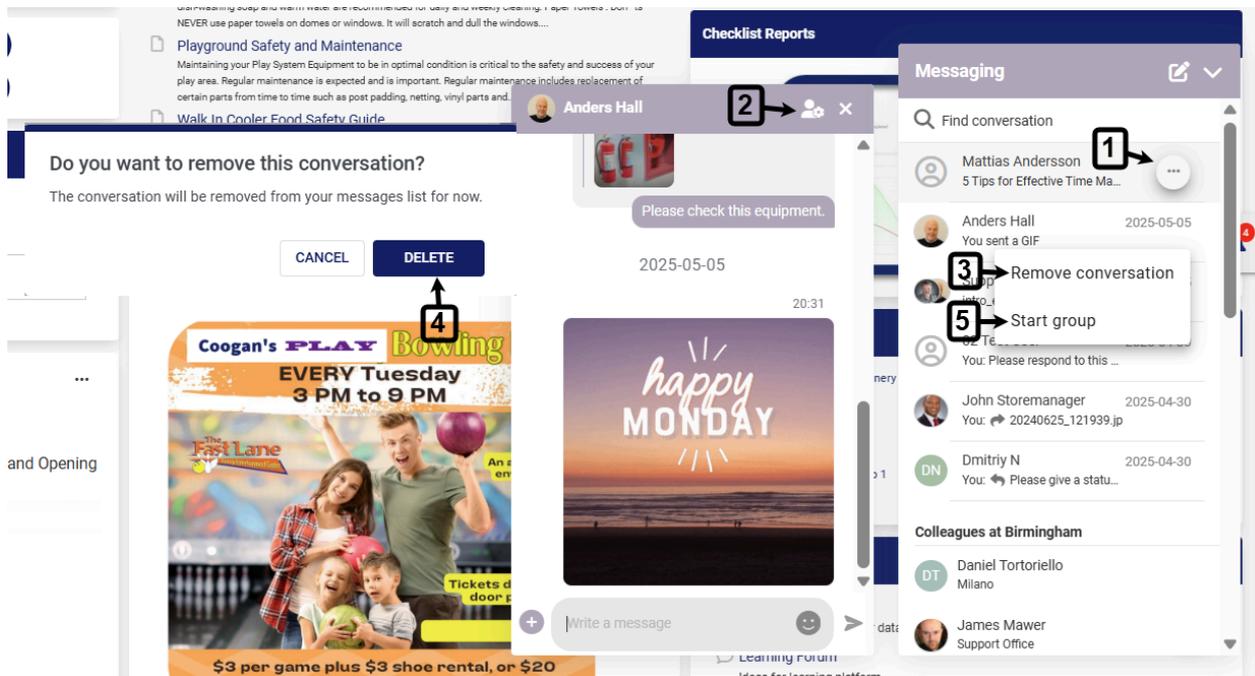
You can hide or temporarily **remove** a conversation from your **Messaging** window and **start group** conversations with your colleagues from the conversation settings.

You can access the user settings of a conversation in the **Messaging** module of either the **Chainformation** website platform or mobile application.

1(a). On the **Chainformation** mobile app, scroll to the name of a colleague in the list of your conversations and long-press it to see the conversation settings.

1(b). On the **Chainformation** website platform, scroll to the name of a colleague in the list of your conversations and hover your mouse over it.

Now, click the three dots (**...**) icon next to their name to see the conversation settings.



2. You can also open the conversation settings by clicking the **user settings** icon in the **Message** window of the selected colleague.

Remove a Conversation

3. You can hide or temporarily remove a conversation from your **Messaging** window by clicking the **Remove** button in its settings.

4. After clicking the **Remove** button, click the **DELETE** button in the pop-up message shown on the screen to confirm your action.

This will temporarily remove the selected conversation from your **Messaging** window and it will no longer be shown in the list of your conversations.

However, the removed chat will reappear in your **Messaging** window when you receive a new message from this conversation. Moreover, you can also still send a message to a removed chat by clicking the **Message** button on the profile page of the concerned colleague in the **Colleagues** tab of **Our organization** page. See the User Guide for Colleagues

Remember, there is no way to permanently delete a conversation from the **Messaging** module of a **Chainformation** platform. However, you can delete your messages sent in a conversation individually. See the User Guide for Delete Sent Messages

Start Group Conversation with a Colleague

5. You can start the group conversation with a colleague by clicking the **Start group** option in their conversation settings. See the User Guide for Group Conversation

Start Group Conversations

There are two ways to start a group conversation in the **Messaging** module of every **Chainformation** platform:

1. You can start a group conversation by adding more than one colleague in the **Recipients** field of the **New message** window. See the User Guide for Start a New Conversation

A new messaging group will be automatically created as soon as you send a text message, file or GIF to your selected recipients.

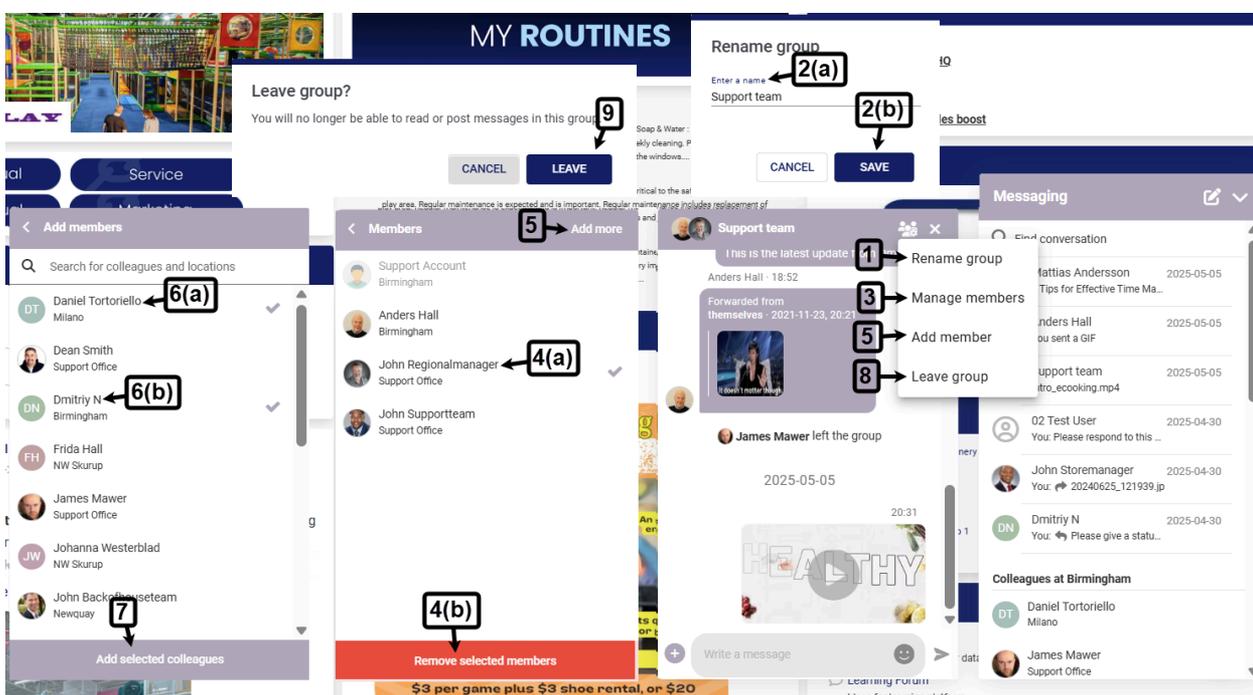
2. You can create a group of two people by clicking the Start group option from the conversation of the colleague with whom you want to start a group conversation. See the User Guide for **Start Group Conversation with a Colleague**

This will create a messaging group of two members (you and your selected colleague) only where you can share information that you do not want to appear in your usual message window with the selected colleague.

However, you can add more members to such a group as well whenever you want to do so. See the User Guide for **Add Members to a Group**

Manage Group Conversations

You can find the group conversations started by you or your colleagues at the top of your messages list along with other conversations in the **Messaging** window. Moreover, you can **rename** a conversation, **add** more **members** to it, **remove** its existing **members** and **leave** it from its settings. See the User Guide for **Conversation Settings**



Rename a Group

1. Open the conversation settings of the group you want to rename and click the **Rename group** option.
2. Enter the new name of the group in the pop-up window and click the **Save** button to save the new group name.

Remove Members from a Group

3. Click the **Manage members** option from the conversation settings.

This will open the list of all members currently part of this group conversation.

4. Select the members you want to remove from the group and then, click the **Remove selected members** from the conversation.

The removed members will no longer be able to see this conversation.

Add Members to a Group

5. Click the **Add members** option from the conversation settings or **Add more** button on the **Members** window to add more members.

6. Scroll down the list of colleagues or use the Search field to find the colleagues you want to add to the selected group and click their names. See the User Guide for Search

7. After selecting the appropriate names, click the **Add selected colleagues** button to add them to this conversation.

Recently added members can now see all the messages in this conversation and send new messages.

Leave a Group

Remember, when you leave a group, you will no longer be able to read and post the messages in this conversation. The selected group will no longer be shown in your list of messages until another member of it adds you to this conversation again.

8. However, if you still want to leave a group, then click the **Leave group** option from the conversation settings.

9. Click the **LEAVE** button in the pop-up message shown on the screen to confirm your action.