

bluChat



User Guide

Version 4.0



Table of Contents

bluChat Introduction	4
Getting Started With bluChat	4
The bluChat Messages Page	5
bluChat Dashboard Portlets	11
Reviewing bluChat Notifications	15
Customizing Your User Profile	16
General Use of bluChat (On a Record)	24
Working With the bluChat Window	24
Sending bluChat Messages	27
Uploading Files to bluChat	30
Working With Activities (Tasks, Phone Calls, and Events)	35
Tagging Users	43
Flagging a Message for Follow-Up	45
Replying to a bluChat Message	48
Replying to a bluChat Message Via Email	50
Reacting to a Message Using an Emoji	53
Removing a Message From the Chat Stream	55
Watching a Chat	57
Subscribing to a Record Type	59
Filtering External User Messages	61
SMS Notifications and Usage (Internal Users Only)	65
Sending SMS Text Messages to External Entities	66
Sorting and Filtering Messages	71

Filtering SMS Messages	75
bluChat Channels, Groups, and Direct Messages	76
Working With Channels	76
Creating a New Channel	76
Adding Members to a Channel	78
Removing Members from a Channel	81
Deleting a Channel	83
Joining an Existing Channel	84
Starring Channels	86
Working With Groups	88
Creating a Group	88
Adding Members to a Group	90
Removing Members from a Group	93
Starring Groups	95
Working With Direct Messages	97
Creating a Direct Message	97

bluChat Introduction

bluChat is a powerful team chat tool that helps NetSuite organizations remove communication silos and accelerate decision-making. By bringing real-time collaboration into the system where work happens, bluChat helps companies collaborate better and faster, both internally and with their partners and customers.

As the only native NetSuite team collaboration tool, bluChat ties side conversations to the records where they belong, keeping context visible and available to all users. Team members collaborate directly on any writable record, including customers, projects, invoices, and custom records. By keeping conversations on the record, all team members can stay in the loop without switching between systems to hunt down conversations.

bluChat uniquely leverages NetSuite's single-source-of-truth database by automatically saving on-record chats directly to the relevant NetSuite record. Maintain a complete, searchable history of business discussions under the appropriate Communications tab (User Notes) for later search and audit.

Additionally, bluChat offers channels, group chats, and direct messages that can replace external chat tools. The user experience is familiar and intuitive, making it easy for teams to learn and seamless to navigate. With both on-record and off-record conversations, bluChat improves cross-departmental collaboration and visibility, supporting better accountability and operational efficiency across departments.

Getting Started With bluChat

Once your company has installed and configured bluChat, bluChat users can set individualized preferences.

Upon first use, you are prompted to accept the bluChat Terms and Conditions by entering your name in a pop-up interface.

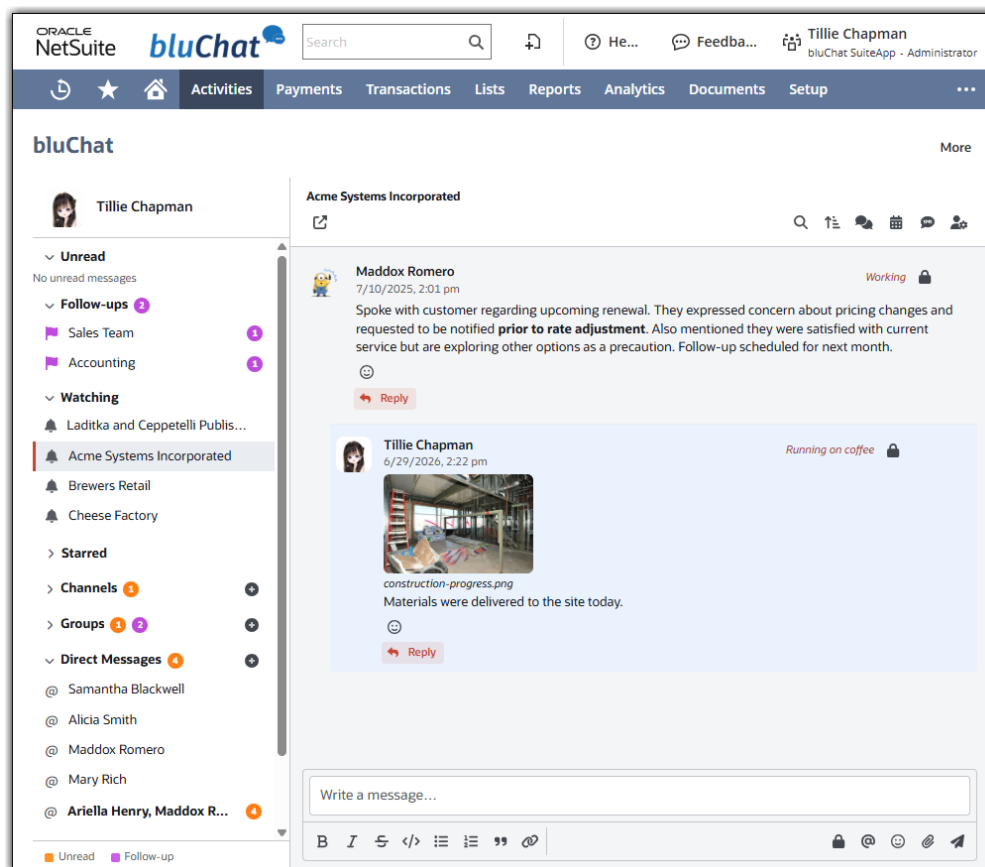
Important: All bluChat messages, even direct messages, can be searched and audited, and therefore are not private.

The bluChat Messages Page

The bluChat Messages page is your central hub for bluChat activity across NetSuite. From a single interface, you can

- ▶ Review unread messages, manage follow-ups, and monitor watched chats, and work with chats you starred.
- ▶ Create and use channels, groups, and direct messages that are not tied to specific NetSuite records (if your company has enabled these options).

While you can also access any on-record bluChat directly from its related record, the Messages page gives you one place to quickly find and work with the conversations that matter most to you right now.



Opening the bluChat Messages Page

To open the bluChat Messages page in your browser, go to *Activities* > *bluChat* > *bluChat Messages*.

Using the Sidebar

Use the sidebar of the bluChat Messages page to review bluChat activity.

Reviewing Chats

The sections in the sidebar help you organize your chats so you can quickly and easily find your most important conversations.

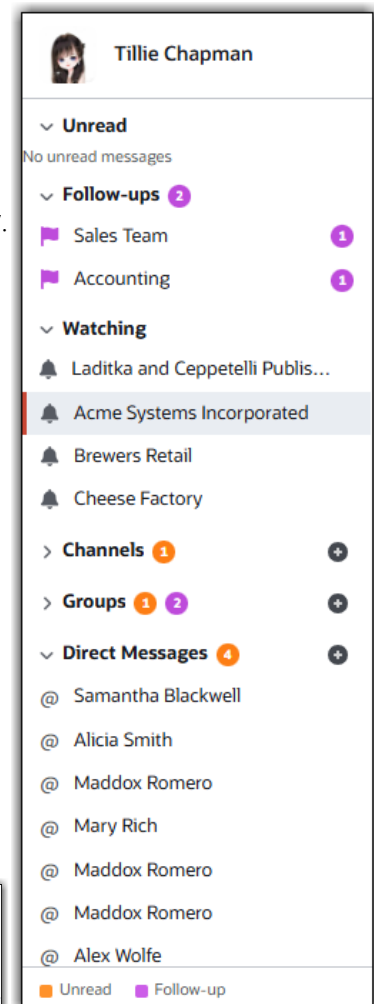
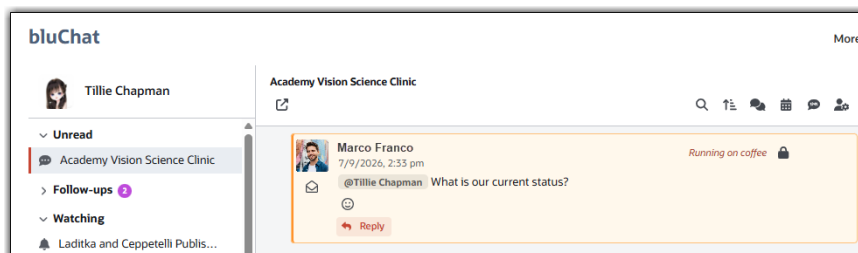
Some sections, such as **Unread**, appear even when they are empty. Other sections, including **Follow-ups**, **Watching**, and **Starred**, do not appear on the bluChat messages page unless they contain at least one chat.

Review unread messages

The **Unread** section lists every **on-record chat** that has a message you are tagged in and have not read yet. Selecting a chat in the sidebar opens that conversation in the main window.

To mark a message as read, click the envelope icon in the top-left corner of the unread message.

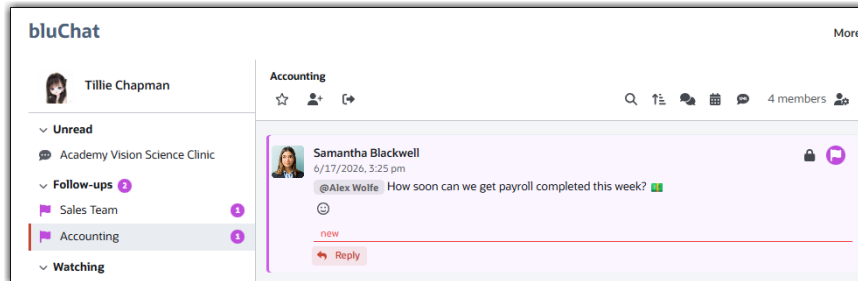
Setting your browser to allow notifications from the page allows you to receive browser or desktop pop-up notifications for mentions when you are not actively using the bluChat Messages page.



Review follow-ups

The **Follow-ups** section lists **every chat** that has a message you flagged to come back to later. Selecting a chat in the sidebar opens that conversation in the main window.

Chats remain in this section until you remove the follow-up flag from the message in the chat.



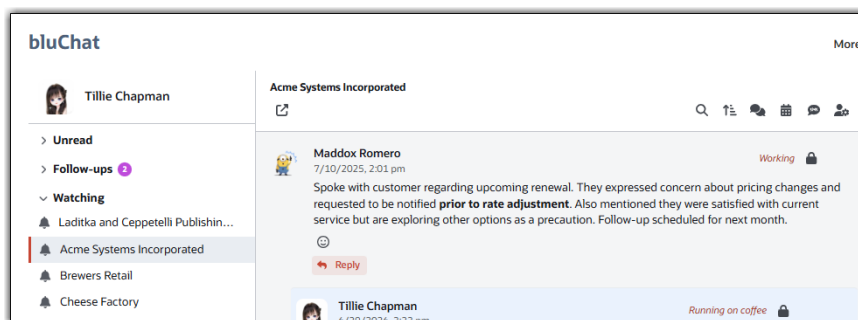
Review watched chats

The **Watching** section lists every **on-record chat** you have decided to watch.

Note: Find the chats you starred that **do not** live on a NetSuite record (channels, groups, and direct messages) in the **Starred** section.

Watched chats are chats you star on a NetSuite record. Watching a chat provides an easy way for you to save an important chat for easy access later, without needing to open the record. Selecting a chat in the sidebar opens that conversation in the main window.

Your watched chats appear in this section even if you are not tagged and have no unread messages in them. They appear in this section until you unwatch them (remove the star), which can only be done on the NetSuite record.



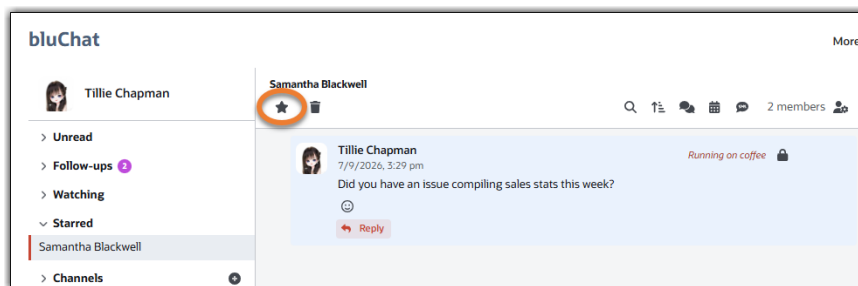
Review starred chats

The **Starred** section lists every **off-record chat** you have starred.

Note: On-record chats appear in the **Watching** section.

Starred chats are channels, groups, and direct messages that you want to pay close attention to. Starring an off-record chat is helpful if you have long lists of channels, groups, and direct messages, and you don't want to search through your lists to find the chats that are most important to you right now.

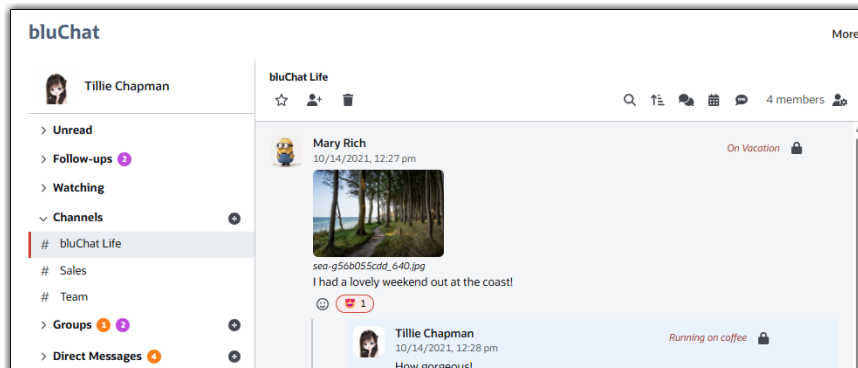
Your starred chats appear in this section even if you are not tagged and have no unread messages in them. They appear in this section until you remove the star.



Review or add channels

If your company has enabled channels, the **Channels** section shows the channels you belong to. Selecting a chat in the sidebar opens that conversation in the main window.

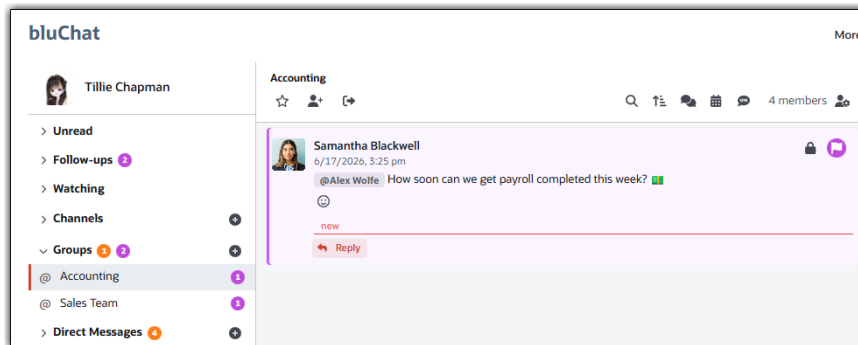
Channels are public, off-record chat streams that any internal company user can search for and join. These chats do not belong to a specific NetSuite record. For more information, see "Working With Channels" on page 76.



Review or add groups

If your company has enabled groups, the **Groups** section shows the groups you belong to. Selecting a chat in the sidebar opens that conversation in the main window.

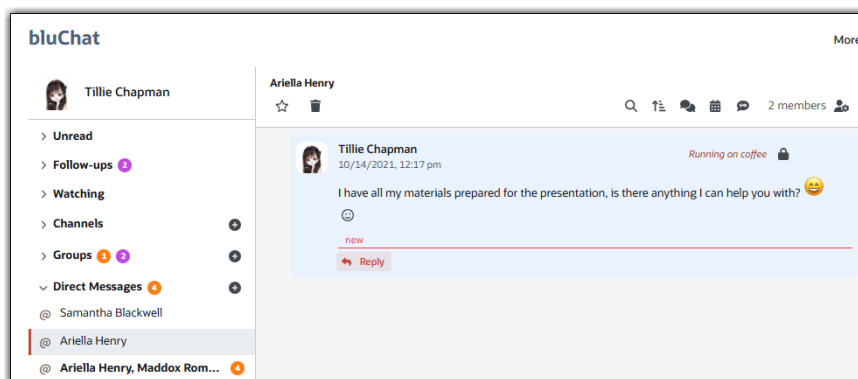
Groups are two or more internal company users in a closed, off-record conversation that can be named. These chats do not belong to a specific NetSuite record. For more information, see "Working With Groups" on page 88.



Review or add direct messages

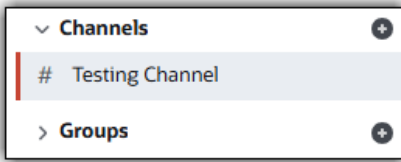
If your company has enabled direct messages, the **Direct Messages** section shows the direct messages you have participated in. Selecting a chat in the sidebar opens that conversation in the main window.

Direct messages are one-to-one, off-record conversations between two internal company users. These chats do not belong to a specific NetSuite record. For more information, see "Working With Direct Messages" on page 97.



Expanding and Collapsing Sections

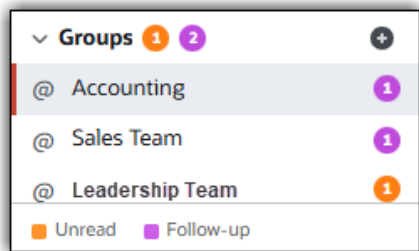
To reduce clutter, you can collapse any section you don't need to see right now. Click a section header to expand or collapse the section.



- Expanded sections show the chats that belong to that section.
- Collapsed sections hide the chats that belong to that section.

bluChat remembers your collapsed and expanded sections the next time you open the messages page.

Using Badges



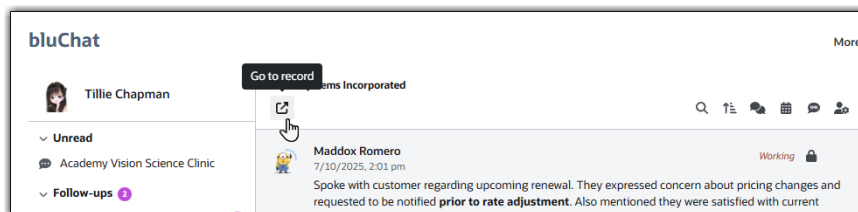
When you have unread or follow-up messages in a specific chat, the chat includes a badge that shows the number of unread or follow-up messages.

The color legend below the sidebar identifies what each badge color means.

Each section header also includes badges that show the total number of unread or follow-up messages within the chats in that section. This allows you to easily identify which chats have messages to review, even when the section is collapsed.

Opening a Record From its Chat

While reviewing an **on-record chat** on the bluChat messages page, use the **External Link** icon to quickly open the record associated with the chat. The record opens in a new browser tab.

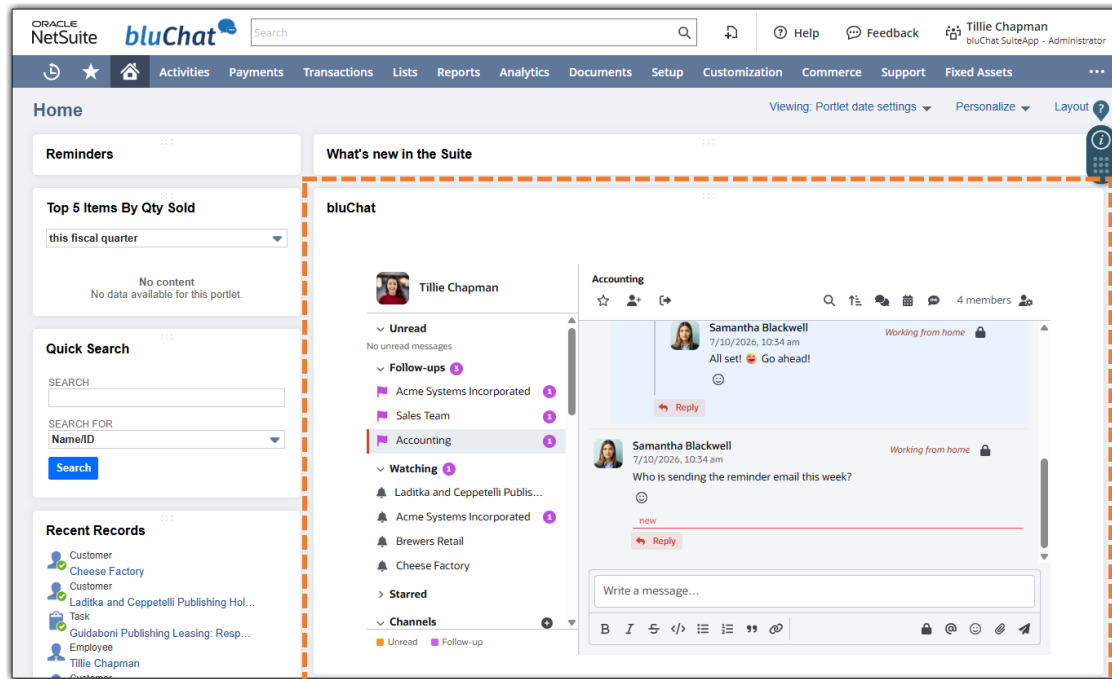


bluChat Dashboard Portlets

bluChat provides dashboard Portlets that provide access to bluChat messages from a centralized location on your NetSuite dashboard.

The bluChat Messages Portlet

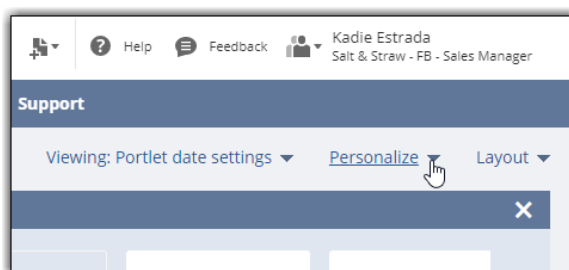
The bluChat Messages Portlet allows you to access and use the [bluChat messages page](#) without leaving your dashboard.



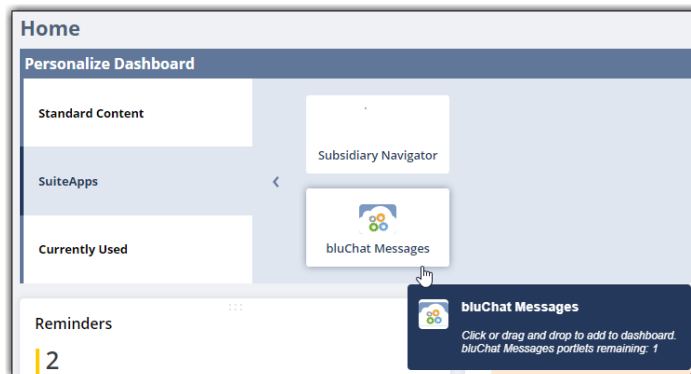
Adding the Portlet to a Dashboard

To add the bluChat Messages Portlet to a dashboard, follow these steps:

1. Go to the dashboard page where you want to add the Portlet.
2. Click the **Personalize** link in the top-right corner of the page.



3. On the left menu, click the **SuiteApps** link.
4. Drag and drop the bluChat Messages Portlet onto the dashboard.



Once you have completed these steps, the bluChat Messages Portlet is available on your dashboard.

Note: While the bluChat Messages dashboard Portlet is available to most users after installation and setup, there are a few instances in which some users cannot add or move dashboard Portlets. If you encounter this situation, see [Enabling the bluChat Messages Portlet for Some User Roles](#) for more information.

The bluChat Messages Sent to Me Portlet

The bluChat Messages Sent to Me Portlet allows you to review the most recent 30 days of bluChat messages on your dashboard. This Portlet can help you make sure you don't miss any messages, and streamline your daily work.

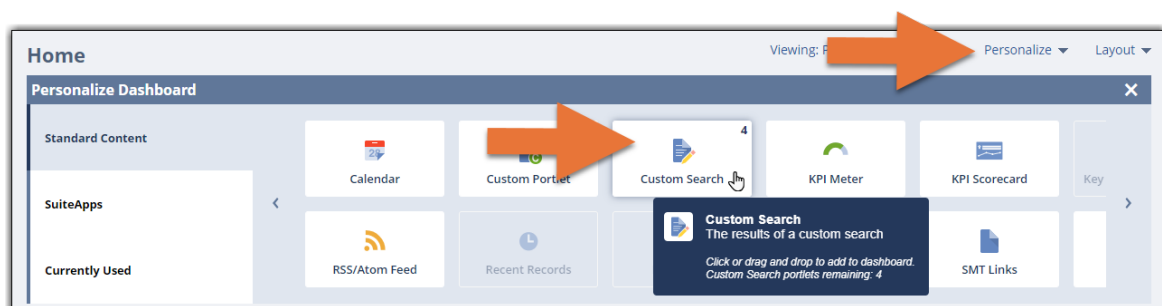
If you want your Portlet to show a different period of time, or use other criteria to determine which messages appear, your company NetSuite administrator can create a custom copy of the Portlet for your company.

bluChat Messages Sent to Me									
TOTAL: 5									
	Edit View	Message DateTime *	From	Message	Mentions Lis	Formula (HTML)	View Email	Is Reply	
✓	 	2023/11/13 12:58:57 pm	David Smith	@David	David Smith	Customer CUS-1001 Hero	View	No	
NEW	 	2023/10/31 11:55:03 am	Kenneth Brasher	@David Smith Please join us in this group session	David Smith	@David Smith	View	No	
✓	 	2023/10/31 11:35:45 am	Kenneth Brasher	@David Smith Count this one	David Smith	Customer CUS-1001 Hero	View	Yes	
NEW	 	2023/10/31 11:11:33 am	Kenneth Brasher	@David Smith testing mention count	David Smith	Customer CUS-1001 Hero	View	Yes	
✓	 	2023/10/31 11:11:33 am	Kenneth Brasher	@David Smith testing mention count	David Smith	Customer CUS-1001 Hero	View	Yes	
✓	 	2023/10/31 10:44:52 am	David Smith	@David Smith @Michael Golichenko @Joe Cool @C tag, you're it	Alan Branch,IMichael Golichenko	Customer CUS-1001 Hero	View	Yes	

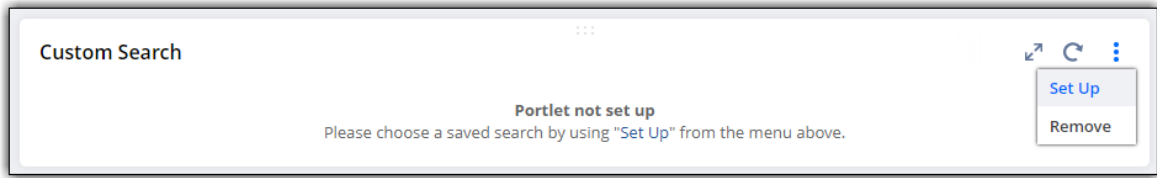
Adding the Portlet to a Dashboard

To add the bluChat Messages Sent to Me Portlet to your dashboard, follow these steps:

1. Navigate to the dashboard page where you want to add the Portlet.
2. Click the **Personalize** dropdown menu in the top left corner of the dashboard.
3. On the Personalize Dashboard window, under Standard Content, click the **Custom Search** button. A blank custom search Portlet appears on your dashboard.



4. On the blank Custom Search Portlet, click the triple-dot menu, and select **Set Up**. The Custom Search window opens.

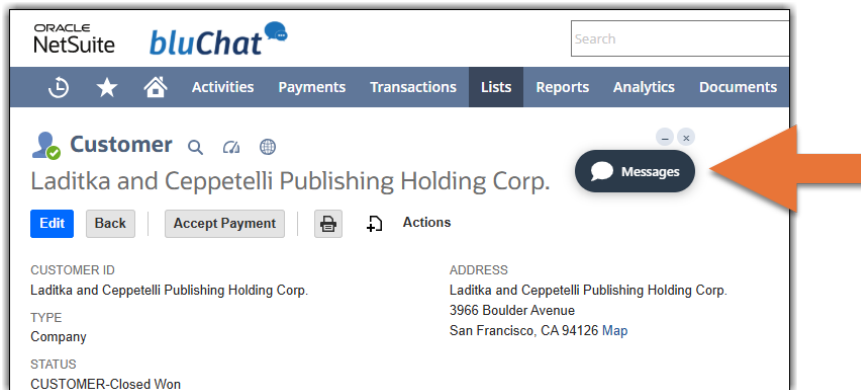


5. From the **Search** dropdown list, select bluChat Messages Sent to Me, or the name of your custom bluChat Portlet, if applicable.
6. Click **Save**. The blank Custom Search Portlet is updated to display the Portlet content you've chosen.

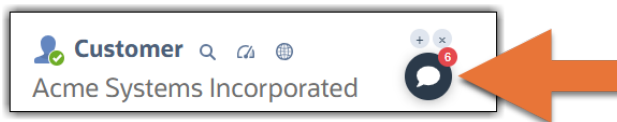
Reviewing bluChat Notifications

bluChat includes a floating icon on all scriptable records, providing easy access to bluChat and clear visibility into unread mentions.

You can move this icon around, and it will stay wherever you put it on the page. You can also use the +/- button to collapse or expand the icon, and it will remain the size you set it to until you change it again.



When you have unread messages, the number of unread messages appears in a **notification badge** on top of the icon.



Clicking the notification icon opens the bluChat Messages page in a new tab, where you user can review any unread messages.

Note: Badge notifications appear only on scriptable records and do not appear on dashboard or list pages.

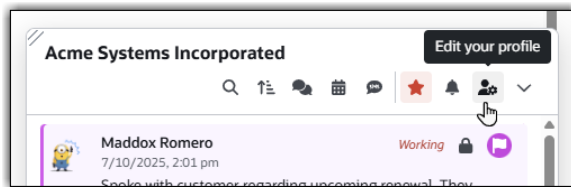
You can dismiss the bluChat icon for your current session by clicking the **x** button. If you dismiss the icon, it disappears from the current page session only. It reappears if new messages arrive while you are on the page.

Customizing Your User Profile

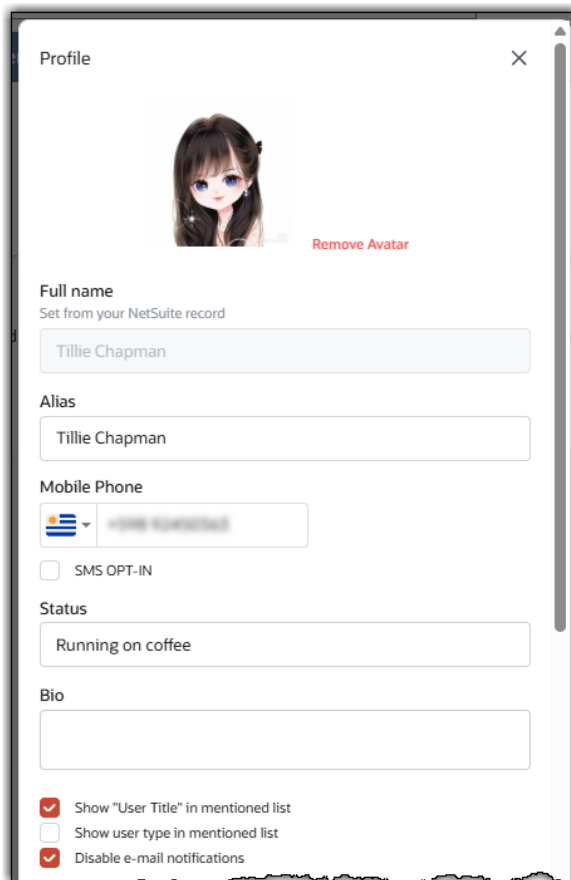
Each bluChat user can create a bluChat user profile, which allows you to save a unique profile picture and personal preferences. In the chat stream, clicking your profile picture or another user's profile picture displays the user profile.

To create or update your profile, follow these steps.

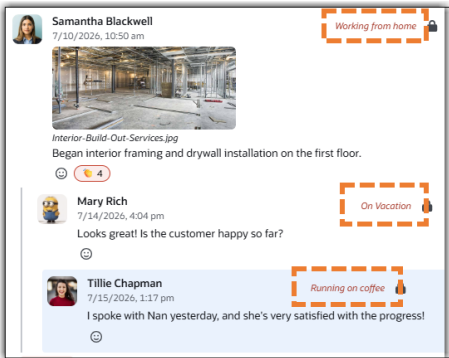
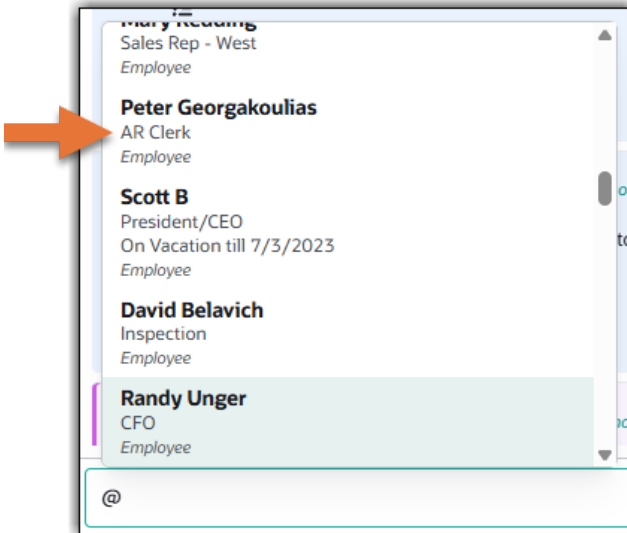
1. At the top of any bluChat window, click the **Personal Settings** icon. The Profile window opens.

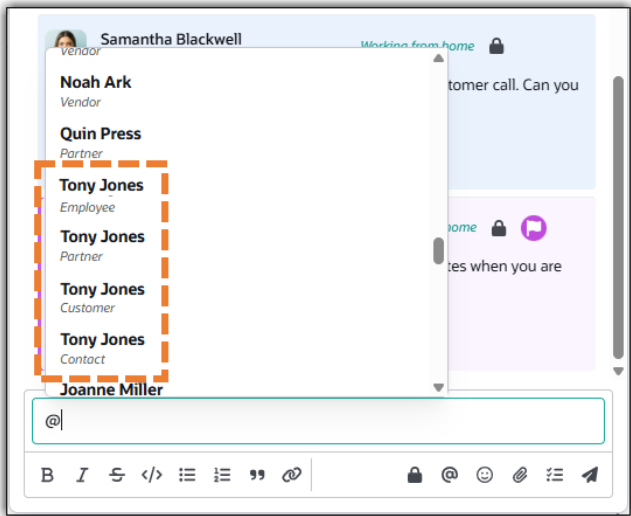


2. In the Profile window, click the **Edit Profile** button. The window changes to Edit mode.
3. In edit mode, use the following options to customize your profile.

A screenshot of the 'Profile' window in edit mode. The window has a title bar 'Profile' and a close button 'X'. It features a profile picture of a woman with a 'Remove Avatar' link below it. The form includes several fields: 'Full name' (Set from your NetSuite record) with the value 'Tillie Chapman', 'Alias' with the value 'Tillie Chapman', 'Mobile Phone' with a dropdown menu showing 'US' and a text field with '408-123-4567', 'SMS OPT-IN' (unchecked), 'Status' with the value 'Running on coffee', and 'Bio' (empty). At the bottom, there are three checkboxes: 'Show "User Title" in mentioned list' (checked), 'Show user type in mentioned list' (unchecked), and 'Disable e-mail notifications' (checked).

Field	Details
Avatar	To upload or change your avatar, click the large Person icon or your current profile picture. Use the browser window to select a new profile picture to use. It may take a minute for your new avatar to load and appear throughout bluChat.
Full Name	Your name populates from your NetSuite user record and cannot be changed.
Alias	Your alias is an alternative display name. If you set an alias and your company allows it to be used as your display name, your alias replaces your Full Name on all your bluChat messages.
 Mobile Phone	If your company uses bluChat+SMS, this is the phone number where you receive SMS text message notifications, in addition to the standard email notification, when you are tagged in a chat. You must also opt in to receive text messages.
 SMS Opt-In	If your company uses bluChat+SMS and you are an internal company user, you can receive SMS text message notifications, in addition to the standard email notification, when you are tagged in a chat. To opt in to receive SMS message notifications, mark this checkbox. You must also enter a valid Mobile Phone number. For more details about how SMS messaging works when you opt in, see "SMS Notifications and Usage (Internal Users Only)" on page 65.
Status	Your status allows you to update other bluChat users on your office hours, upcoming vacation time, or any other relevant information pertaining to your work status. Follow your company guidelines for the status you choose to set.

Field	Details
	
Bio	Your bio allows you to share information about yourself or your job with other bluChat users. Follow your company guidelines to post a brief bio statement explaining to other users who you are and what you do. This bio is visible when other users click your avatar to view your profile.
Show "User Title" in mentioned list	Include a user's Job Title from their Employee record in the mentions list when you search for users to tag. This option can help you find the correct person to tag, particularly if you have more than one contact with the same name. 
Show user	Include user types in the mentions list when you search for users to tag. The user search lists the entity type of each bluChat user.

Field	Details
type in mentioned list	This option can help you find the correct person to tag, particularly if you have more than one contact with the same name. 
Disable e-mail notifications	If you don't want to receive bluChat email notifications from the system, mark this checkbox.
Reply notifications	Determine how you want to be notified when someone replies in a thread you are a part of. • <i>Off</i> - Do not receive notifications • <i>In-App Only</i> - Receive an in-app notification only • <i>In-App + Email</i> - Receive an in-app notification and email

4. Use the following settings to customize your bluChat preferences.

Color theme

Redwood (red)

Formatting buttons

Choose which formatting controls appear in the message toolbar.

☒ Bold

☒ Italic

☒ Strikethrough

☒ Code

☒ Bullet list

☒ Numbered list

☒ Quote

☒ Link

Display size

Scales the whole chat interface — text, spacing, and icons.

Default

Send messages with

How to send: plain Enter, or Ctrl/Cmd-Enter (Enter makes a new line).

Enter

☒ Show avatars in messages

☒ Mark mentions read when I open a channel

☐ Desktop notification when I'm mentioned

☒ Show the floating unread badge on NetSuite record pages

Chat window on records

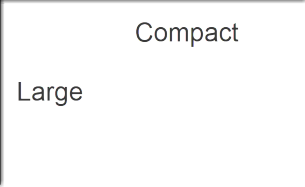
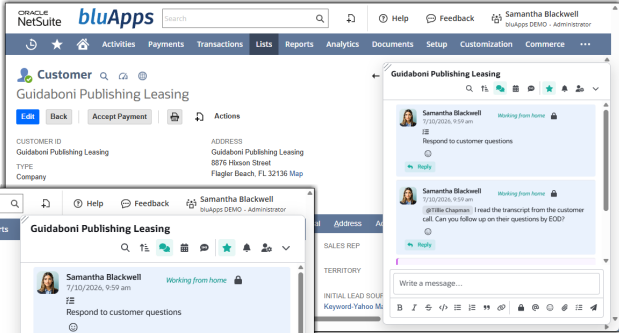
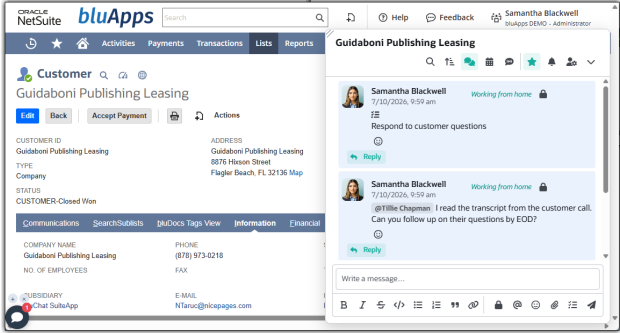
How the on-record chat window starts when you open a record.

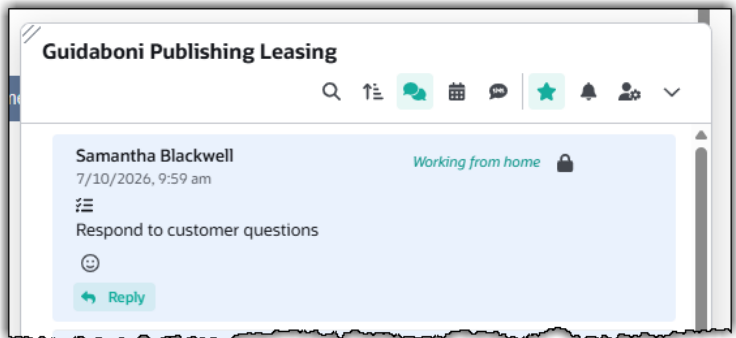
Always minimized

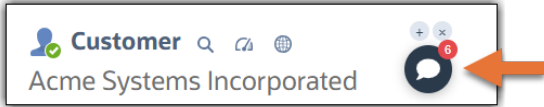
Cancel

Save

Setting	Details
Color theme	Choose your preferred accent color for bluChat interface elements. • Redwood (red) • Teal • NetSuite Blue • Slate Atherton Grocery Arwen Stephenson 7/28/2026, 11:40 am Have you made a customer happy today? EVENT Atherton Grand Opening 📍 Reply Cheese Factory Tillie Chapman 7/17/2026, 12:16 pm Running on coffee ☕ image_2026-07-17T16:15:09.122Z.png Getting lots of work done before the storms hit! Still pretty nice weather. 📍 Reply
Formatting buttons	Choose which formatting buttons you want to have available below your bluChat message composer. You can save visual space by removing any buttons you do not plan to use for formatting your

Setting	Details
	messages. • Bold • Italic • Strikethrough • Code • Bullet list • Numbered list • Quote • Link Write a message... B I ↵ </> ≡ ≡ ” 🔗 🔒 @ 😊 📎 ≡ 🚀
Display size	Scale the whole bluChat interface, including text, spacing, and icons, to make it easier for you to use and work with. • <i>Compact</i> - Save space by making bluChat interface elements smaller and more compact. This may be beneficial if you want to size down the bluChat window to take up less space on record pages. • <i>Default</i> - The default scale is between Compact and Large. • <i>Large</i> - Make bluChat messages and interface elements larger. Large scaling may require you to size up the bluChat window to use more space on record pages.  Compact Large

Setting	Details
Send messages with	Choose whether you want to send messages from the message composer by pressing • <i>Enter</i> - Pressing Enter sends the message. Press Shift+Enter to create a new line. • <i>Ctrl/Cmd-Enter</i> - Pressing Enter creates a new line. Press Ctrl/Cmd-Enter to send the message.
Show avatars in messages	Show or hide the profile pictures on chats.  <i>bluChat with avatars hidden</i>
Mark mentions read when I open a channel	When you open a channel where someone mentioned you, those mentions are automatically marked as read and cleared from your unread messages. If you want to keep mentions unread until you individually mark them as read, turn this setting off.
Desktop notification when I'm mentioned	When someone mentions you, your browser pops up a system notification, even if the bluChat tab is not in focus. If you do not want system notifications for bluChat mentions, turn this setting off.
Show the floating unread badge on	A small, floating bluChat badge is available to include on NetSuite record pages. This badge shows how many unread bluChat messages you have and provides quick access to open the bluChat messages page. You can move this badge around and put it anywhere on the

Setting	Details
NetSuite record pages	page. If you do not want this badge to appear on record pages, turn this setting off. 
Chat window on records	Determines how the bluChat conversation panel appears on NetSuite record pages. • Always minimized • Always open • Remember last state

5. After completing your user profile, click the **Save** button.

Your profile picture, options, and settings now apply to your messages in bluChat.

General Use of bluChat (On a Record)

bluChat on-record chats allow teams to discuss customers, projects, transactions, and custom records directly on the record, eliminating the need to search across disconnected chat applications. With conversations automatically tied to business records and preserved for future reference, organizations gain stronger accountability, business continuity, and auditability while improving cross-functional productivity.

Your company determines the records that include bluChat, as well as how the chat is available when the record is open in *View* mode vs. *Edit* mode. Use bluChat on a record page from any record where bluChat is deployed.

Upon first use, each user must accept the bluChat terms and conditions. When you are prompted to accept the terms and conditions, enter your name into the popup interface.

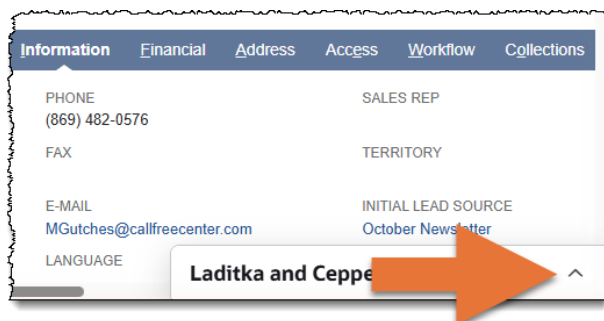
Working With the bluChat Window

The bluChat window appears on any records where your company has chosen to deploy bluChat.

Note: By default, the chat window remembers whether you last left it minimized or open. If you would rather have it always start minimized or always start open, you can set this in your profile. See "Customizing Your User Profile" on page 16.

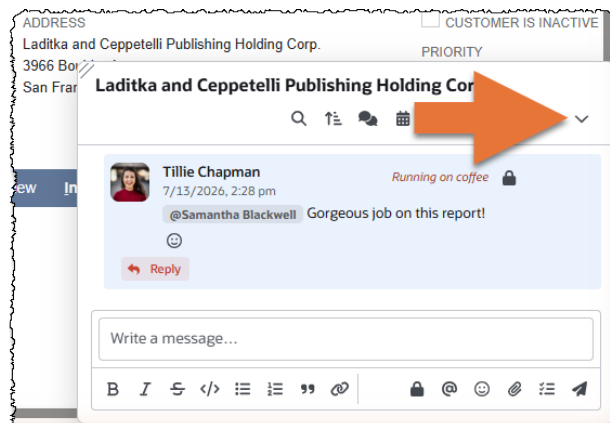
Opening the Chat Window

To open the chat window, click the Expand button on the bluChat bubble in the bottom-right corner of the page.



Minimizing the Chat Window

To minimize the chat window, click the minimize chevron in the upper right corner of the chat window.

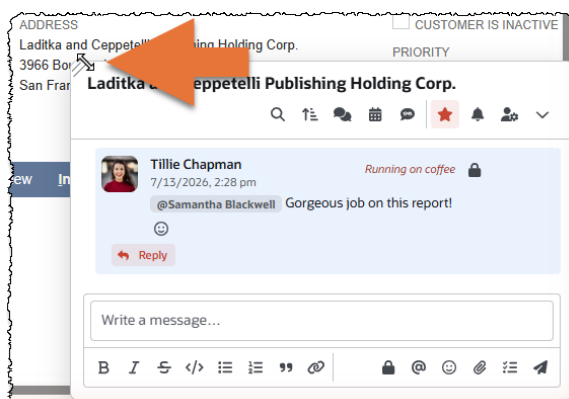


Resizing the Chat Window

Note: bluChat remembers your sizing.

To resize the chat window, follow these steps.

1. Hover your mouse over the top left corner of the chat window until your cursor changes to a resize arrow.



2. Click and hold.

3. Drag the mouse until you reach the window size you want, then release.

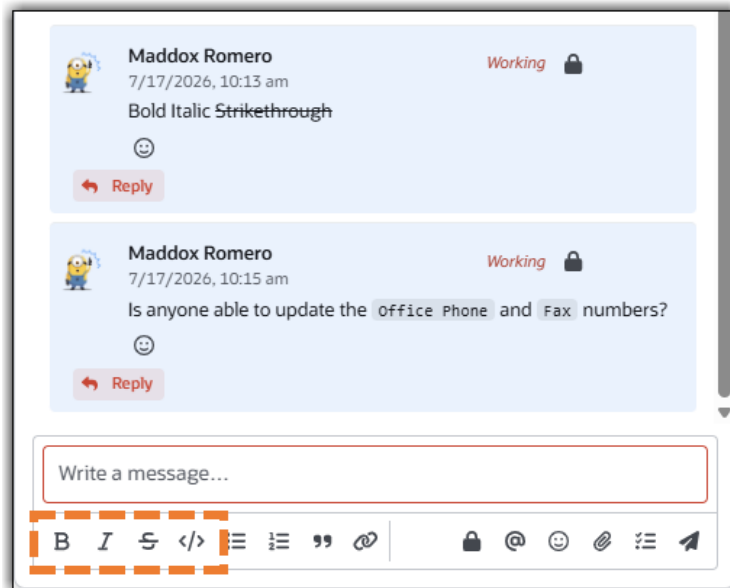


Sending bluChat Messages

Formatting Text in Chats

Format the text of messages by clicking the **Bold**, **Italic**, **Strikethrough**, and **Code** buttons.

You can use any combination of bold, italic, or strikethrough formatting. Click the `</>` button to share code snippets in the chat stream.

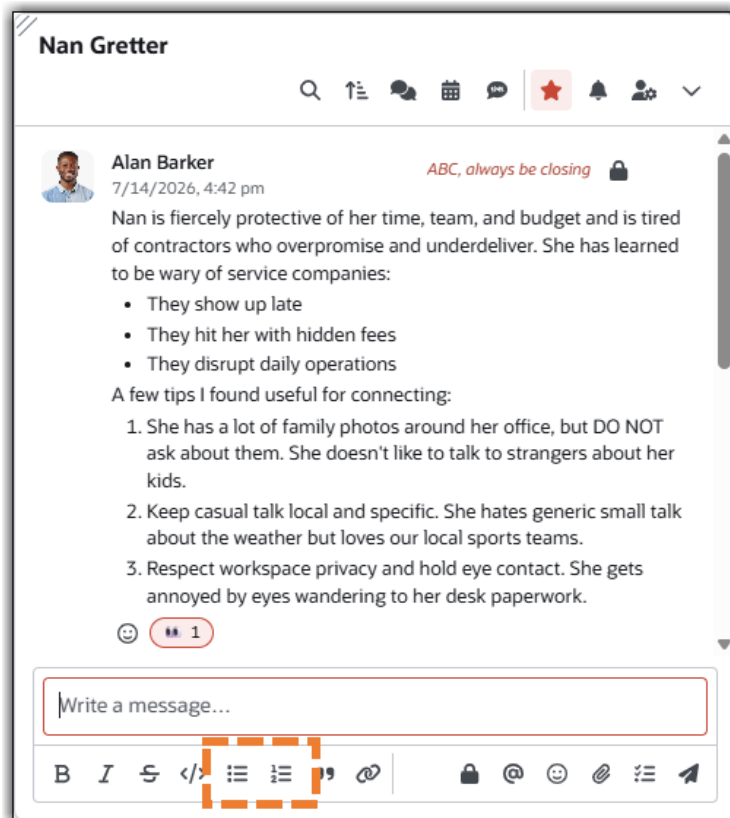


Formatting Bulleted and Ordered Lists

To create a bulleted or ordered list within the chat stream, click on the respective button below the text input box.

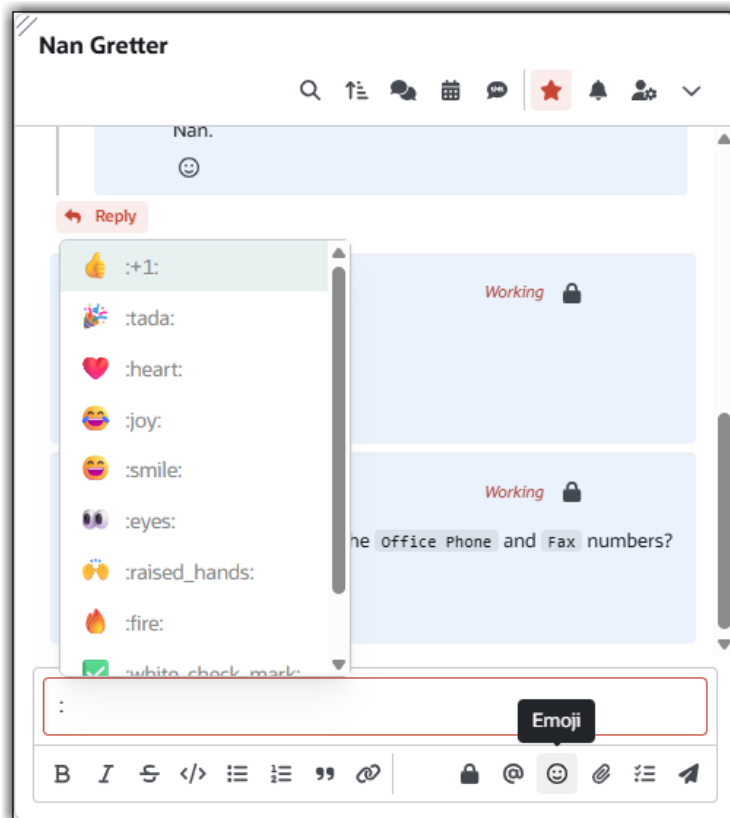
- Press **Ctrl+Enter** on your keyboard to create a new bullet or ordered list item for both types of lists.
- Press **Enter** or click the **Send** button to post your list as a chat message.

Note: To enter more text after the list, press **Ctrl+Enter** on your keyboard after your last list item and click the **List** icon again.



Using Emojis

To use emojis in your chat messages, click the **Emoji** button below the text input box or use your keyboard to type a colon (**Shift + :**). Select your emoji from the menu.



Uploading Files to bluChat

You can upload files to share in bluChat. Uploaded files are tied to the NetSuite record where the bluChat window appears.

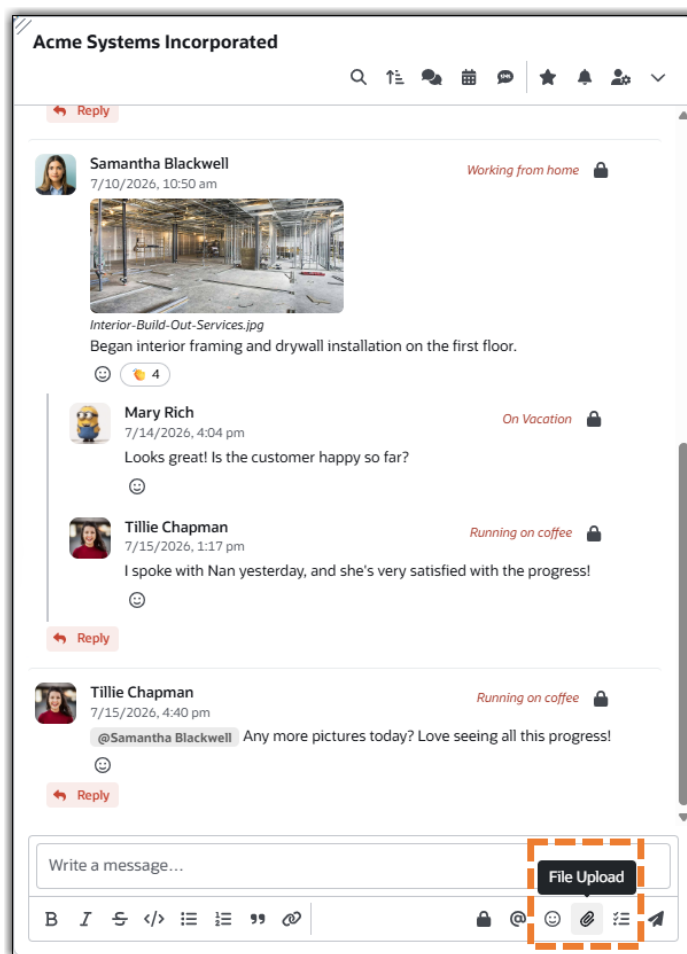
Important: Any users who have access to the record can see the bluChat, along with any files you upload. Use discretion when uploading any file.

bluChat provides several different methods you can use to upload and share files.

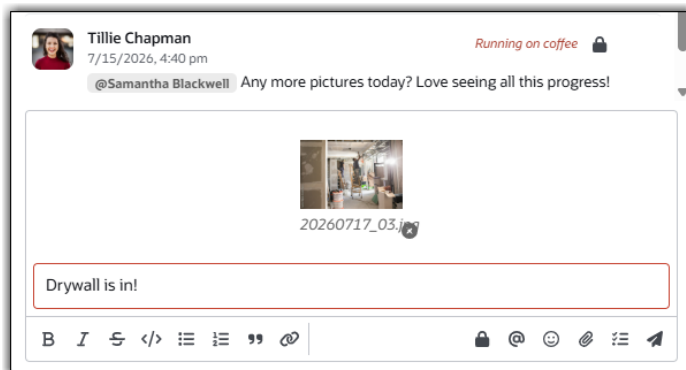
Uploading a File with the File Upload button

The bluChat window includes a **File Upload** button, which allows you to quickly attach a file from your computer.

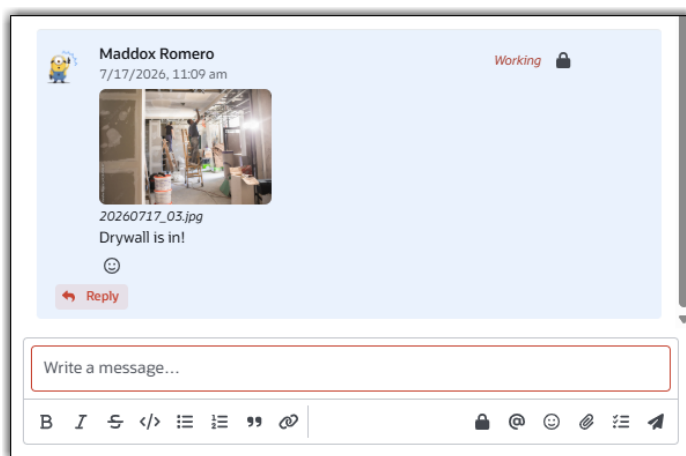
1. Click the **File Upload** button. The Open dialog box appears, allowing you to browse your computer for a file to upload.



2. In the Open dialog box, find and select the file you want to upload. The application attaches the file automatically, and a preview appears in the bluChat window.



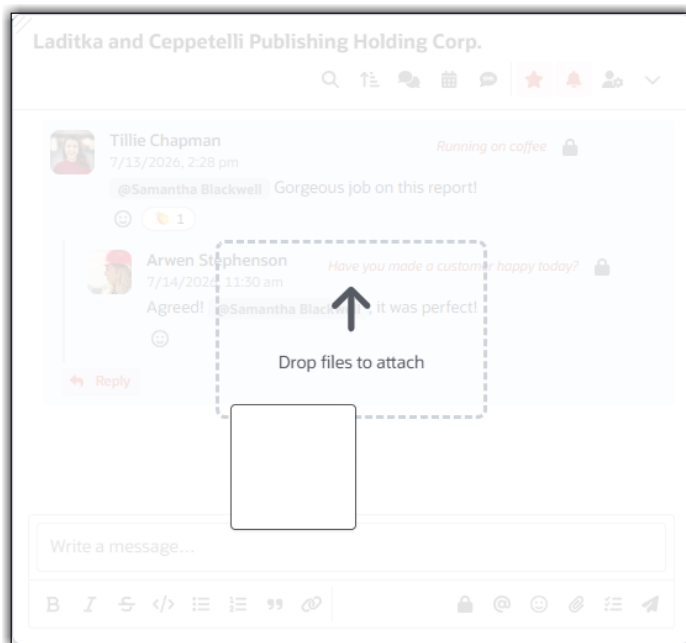
3. In the text box, type a note or description about the file.
4. When you are ready to send the file and message to the chat, press **Enter** or click the **Send** icon. The file appears in the chat stream and uploads to your NetSuite File Cabinet.



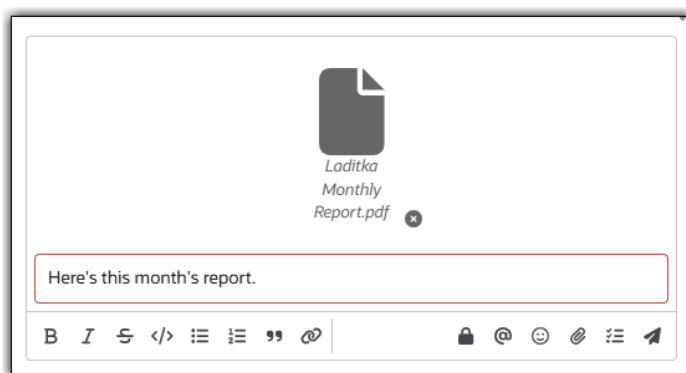
Uploading a File with Drag and Drop

You can use your local file manager to drag and drop your file directly into the bluChat window.

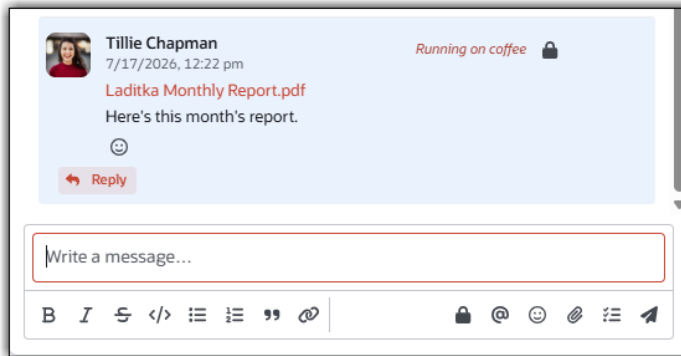
1. In your computer's file manager, locate the file you want to upload.
2. Click your file, drag it into the bluChat window until you see the dotted border surrounding the chat window, and then release. The application attaches the file automatically, and a preview appears in the bluChat window.



3. In the text box, type a note or description about the file.



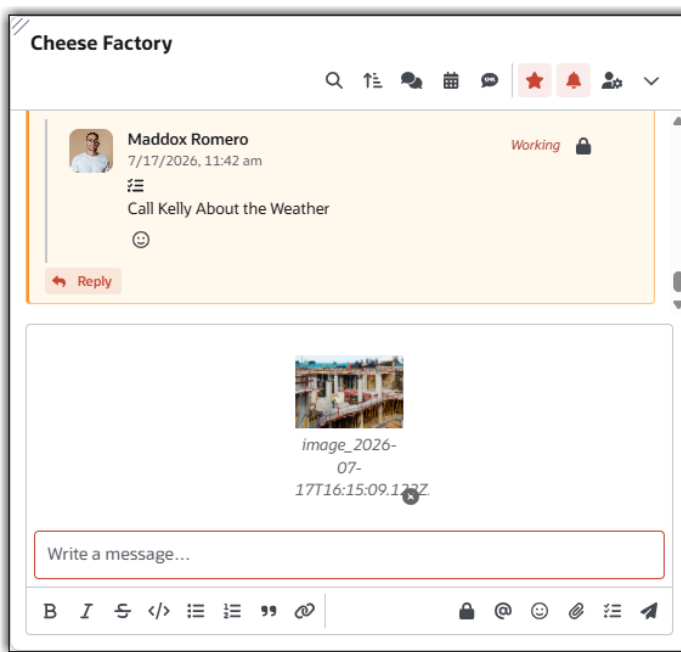
- When you are ready to send the file and message to the chat, press **Enter** or click the **Send** icon. The file appears in the chat stream and uploads to your NetSuite File Cabinet.



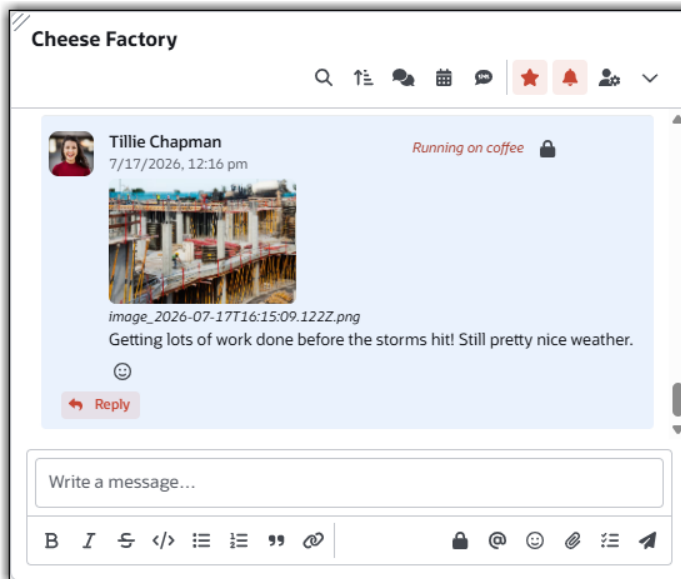
Copying and Pasting an Image File

If the file you want to upload is an image, you can copy and paste the image into the bluChat window.

- On your computer, locate the image you want to upload.
- To copy the image to your clipboard, right-click the image and select *Copy Image* or *Copy*. Depending on the program you are using to access the image, in some cases, you can also select the image and click **Ctrl+C**.
- In the bluChat window, right-click inside the text box and select *Paste*. The application attaches the file automatically, and a preview appears in the bluChat window.



4. In the text box, type a note or description about the image.
5. When you are ready to send the file and message to the chat, press **Enter** or click the **Send** icon. A new graphic file is created and added to both the file cabinet and the chat stream. The new image file name includes a timestamp that identifies when the image was pasted into the bluChat window.



Working With Activities (Tasks, Phone Calls, and Events)

bluChat allows you to create activities directly from an **on-record** chat.

- **Task** - Create a task and assign it to a user with a specific due date and priority.
- **Phone Call** - Create a phone call, either inbound or outbound, without leaving the record.
- **Event** - Create an event with a start date and end date.

The activity record you create is automatically associated with the same record as the chat.

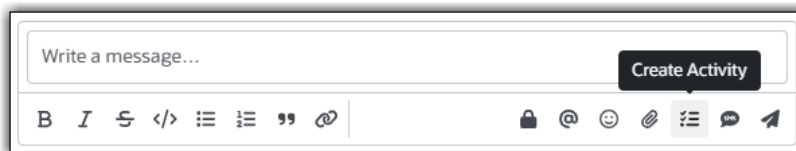
Creating Tasks

Because bluChat is contextual, tasks you create in a specific bluChat window are related to the current record. When you create a task, you can select a due date and assign the task to a specific user. bluChat notifies the assigned user when a task is created and assigned to them.

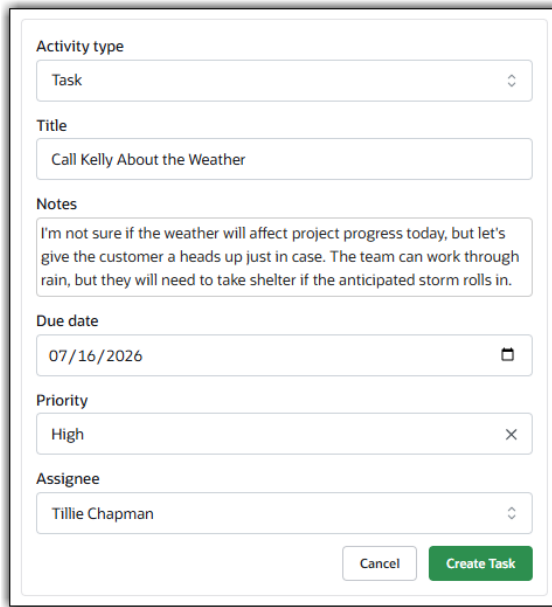
Creating, Assigning, and Scheduling a Task

To assign a task from within bluChat, follow these steps.

1. In the bluChat window, click the **Create Activity** button below the text input box.

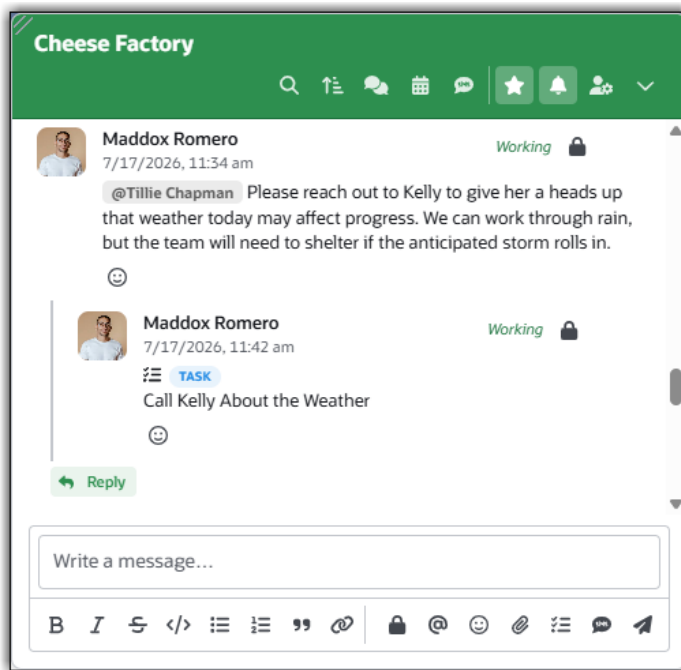


2. In the **Activity Type** field, select *Task*.
3. Complete the fields on the bluChat task form.

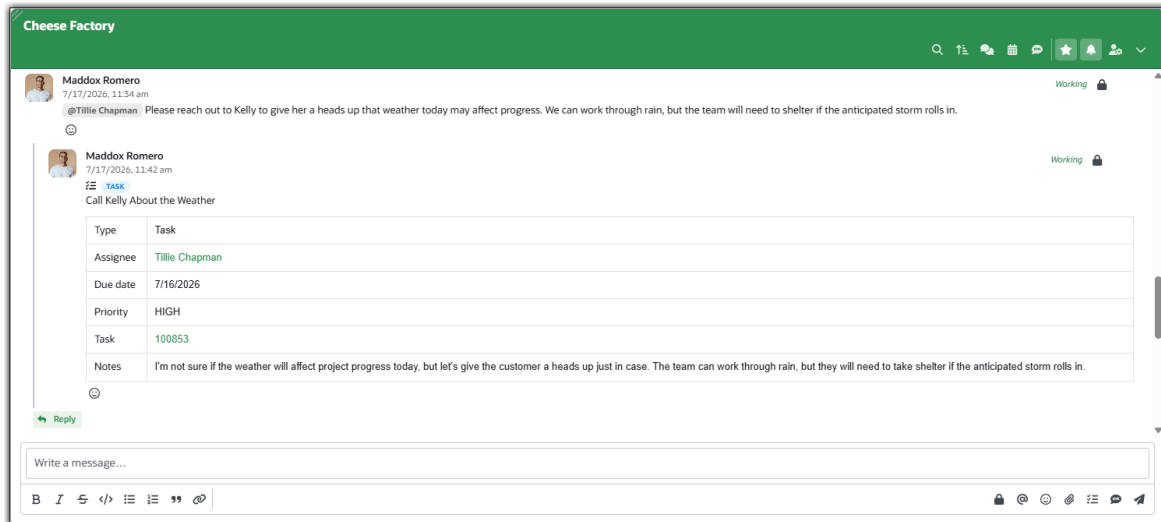


- **Activity Type** - Select *Task*.
- **Title** - Enter the title of the new task.
- **Notes**- Add a description, explanation, or other details necessary for the assigned user to understand the task.
- **Due date** - Use the calendar button to select a due date for the task.
- **Priority** - select the task's priority (Low, Medium, or High).
- **Assignee** - Use the dropdown menu to select a user to assign to the task.

4. When you are ready to create the task and notify the assigned user, click the **Send** button or press the **Enter** key on your keyboard.

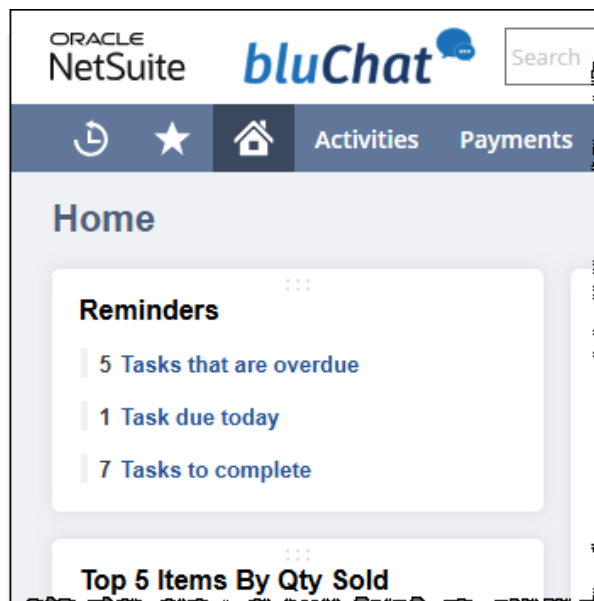


The task is created, and the newly created task in the bluChat window includes links to the related assignee user record and the newly created Task record.

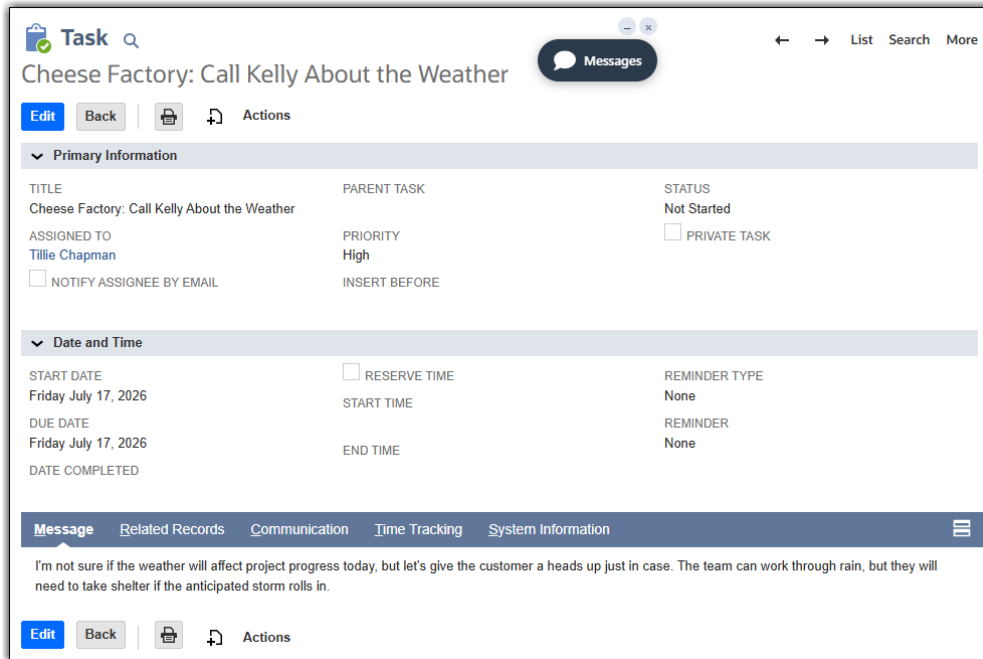


Reviewing Tasks Created in bluChat

When a task is created in bluChat, the assignee receives a notification of the new task on their Reminders dashboard Portlet, as well as in any other task assignment workflows you may have configured in NetSuite.



Clicking the task link in bluChat allows you to access the Task record.



Task

Messages

Edit **Back** **Print** **Actions**

Primary Information

TITLE Cheese Factory: Call Kelly About the Weather	PARENT TASK	STATUS Not Started
ASSIGNED TO Tillie Chapman	PRIORITY High	☐ PRIVATE TASK
☐ NOTIFY ASSIGNEE BY EMAIL	INSERT BEFORE	

Date and Time

START DATE Friday July 17, 2026	☐ RESERVE TIME	REMINDER TYPE None
DUE DATE Friday July 17, 2026	START TIME	REMINDER None
DATE COMPLETED	END TIME	

Message **Related Records** **Communication** **Time Tracking** **System Information**

I'm not sure if the weather will affect project progress today, but let's give the customer a heads up just in case. The team can work through rain, but they will need to take shelter if the anticipated storm rolls in.

Edit **Back** **Print** **Actions**

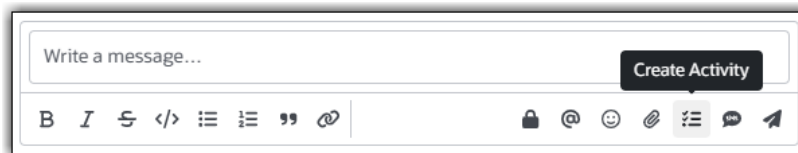
Creating Phone Calls

Because bluChat is contextual, phone calls you log in a specific bluChat window are related to the current record. When you create a phone call , you can select a date and direction, and enter details for the phone call.

Logging a Phone Call

To create a phone call record from within bluChat, follow these steps.

1. In the bluChat window, click the **Create Activity** button below the text input box.

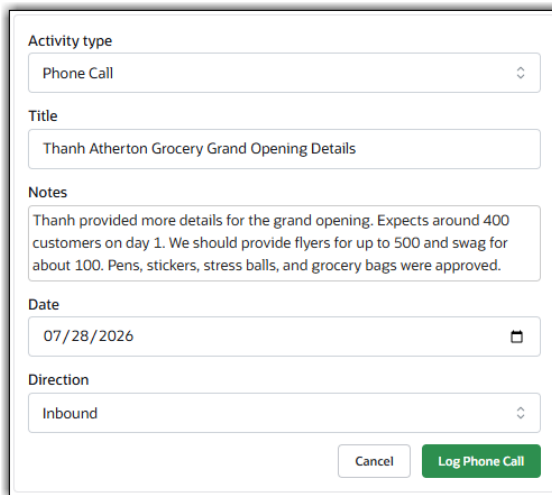


Write a message...

Create Activity

B **I** **S** **</>** **≡** **≡** **”** **🔗** **🔒** **@** **😊** **🔗** **☰** **💬** **📌**

2. In the **Activity Type** field, select *Phone Call*.
3. Complete the fields on the bluChat phone call form.



Activity type
Phone Call

Title
Thanh Atherton Grocery Grand Opening Details

Notes
Thanh provided more details for the grand opening. Expects around 400 customers on day 1. We should provide flyers for up to 500 and swag for about 100. Pens, stickers, stress balls, and grocery bags were approved.

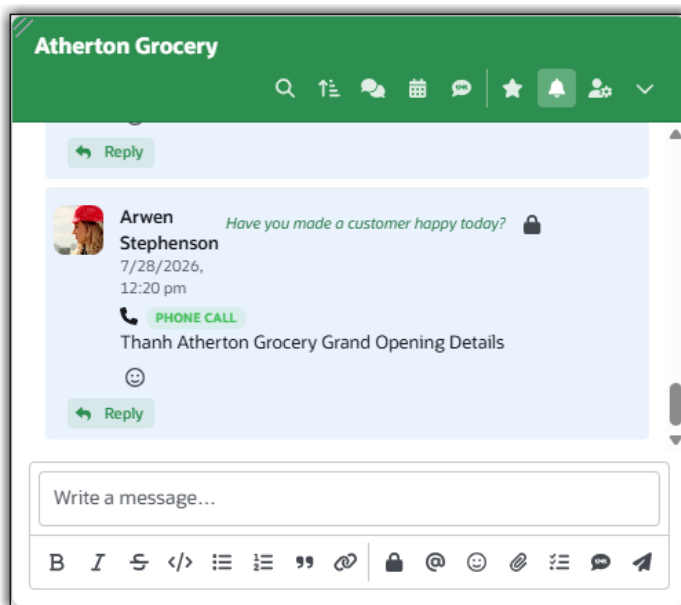
Date
07/28/2026

Direction
Inbound

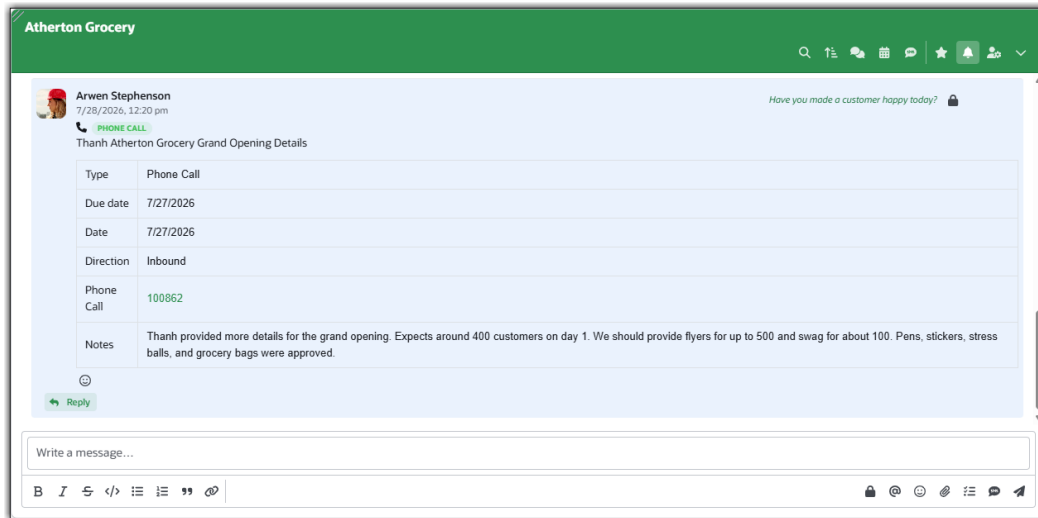
Cancel Log Phone Call

- **Activity Type** - Select *Phone Call*.
- **Title** - Enter the title of the new phone call record.
- **Notes**- Add a description, explanation, or other details for the phone call.
- **Date** - Use the calendar button to select the date of the phone call.
- **Direction**- Use the dropdown menu to select whether the phone call is inbound (received from the caller) or outbound (a call you made).

- When you are ready to create the phone call record, click the **Log Phone Call** button or press the **Enter** key on your keyboard.

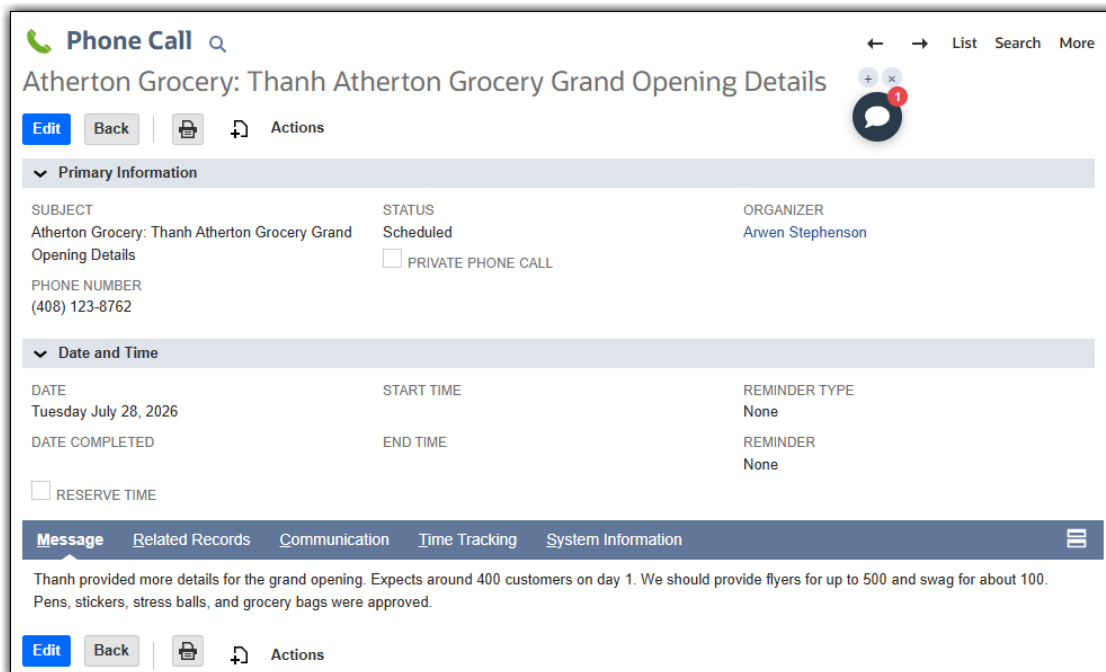


The phone call is created. Use the phone call details icon in the bluChat window to review details, including a link to the newly created Phone Call record.



Reviewing Phone Calls Created in bluChat

Clicking the phone call link in bluChat allows you to access the Phone Call record.



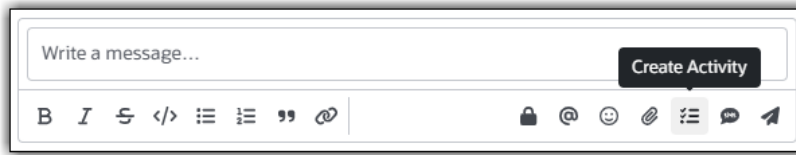
Creating Events

Because bluChat is contextual, events you create in a specific bluChat window are related to the current record. When you create an event, you can select a start and end date as well as event details.

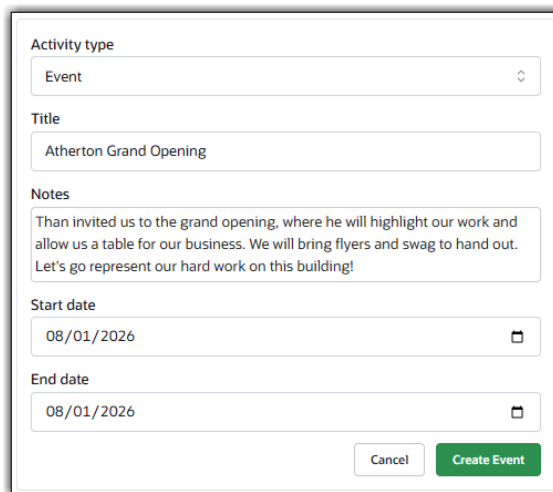
Creating and Scheduling an Event

To create an event from within bluChat, follow these steps.

1. In the bluChat window, click the **Create Activity** button below the text input box.



2. In the **Activity Type** field, select *Event*.
3. Complete the fields on the bluChat event form.

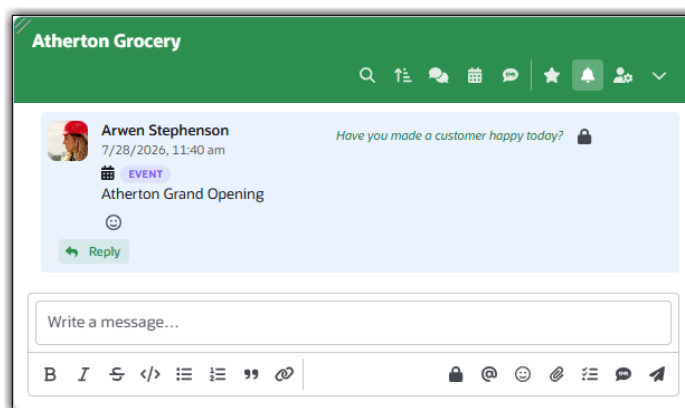

 A screenshot of the "Create Event" form in bluChat. The form has several fields:

- Activity type:** A dropdown menu with "Event" selected.
- Title:** A text input field containing "Atherton Grand Opening".
- Notes:** A text area containing the text: "Than invited us to the grand opening, where he will highlight our work and allow us a table for our business. We will bring flyers and swag to hand out. Let's go represent our hard work on this building!".
- Start date:** A date picker field showing "08/01/2026".
- End date:** A date picker field showing "08/01/2026".

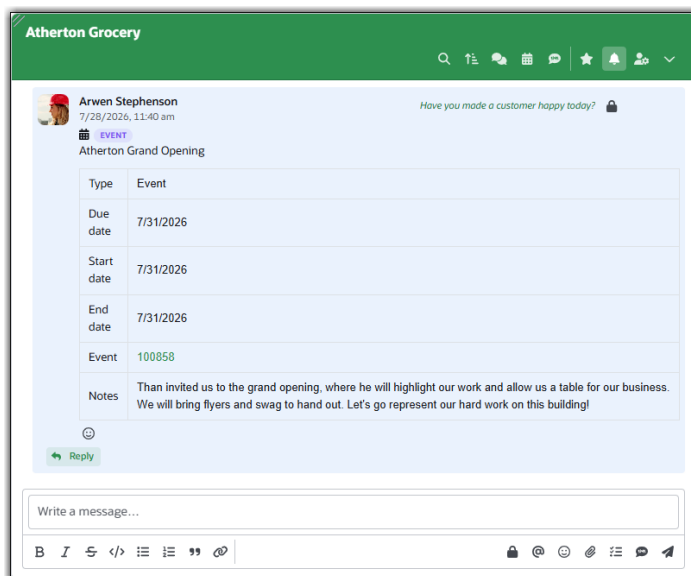
 At the bottom right of the form are two buttons: "Cancel" and "Create Event".

- **Activity Type** - Select *Event*.
- **Title** - Enter the title of the new event.
- **Notes**- Add a description, explanation, or other details for the event.
- **Start date** - Use the calendar button to select a start date for the event.
- **End date** - Use the calendar button to select an end date for the event.

4. When you are ready to create the event, click the **Create Event** button or press the **Enter** key on your keyboard.

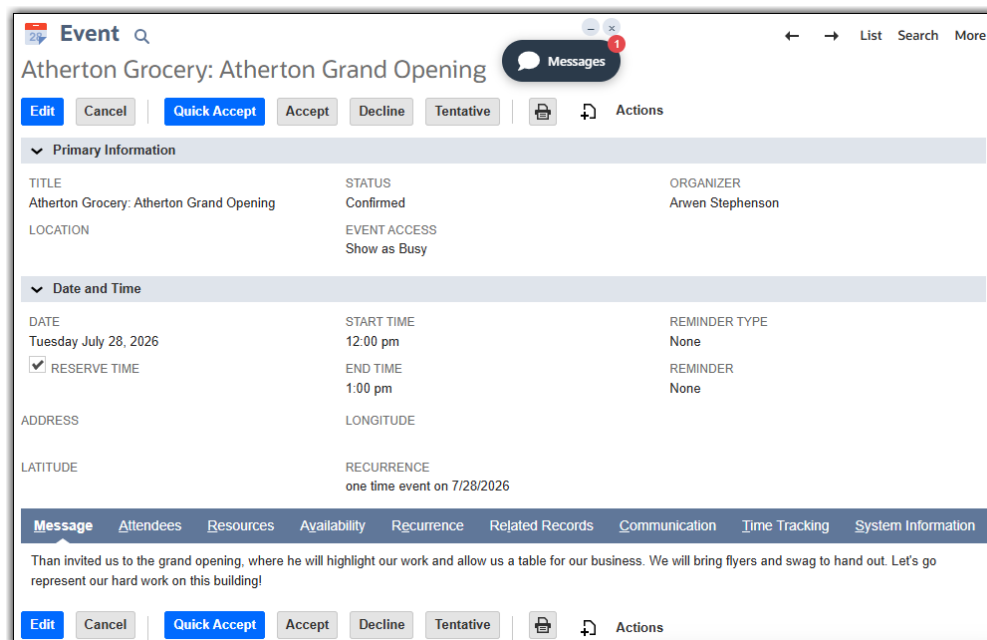


The event is created and added to the chat stream. Clicking the event details button in the bluChat window displays details, including a link to the newly created Event record.



Reviewing Events Created in bluChat

Clicking the event link in bluChat allows you to access the Event record.



Tagging Users

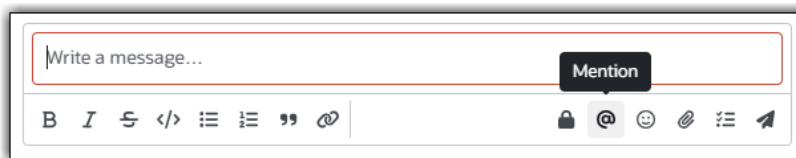
Tagging bluChat users provides a way to notify users of chat messages you want them to see. When you tag a user in a bluChat message, the tagged user receives an email notification.

- If a Partner, Vendor, or Customer has access to bluChat, you can tag these user types.
- Tagging a user who is not authorized to access the NetSuite record sends the email notification, but does not grant the user access to the record. If you need to adjust record permissions so a tagged user can see the bluChat message stream, talk with your company's NetSuite Administrator.

Tagging a User

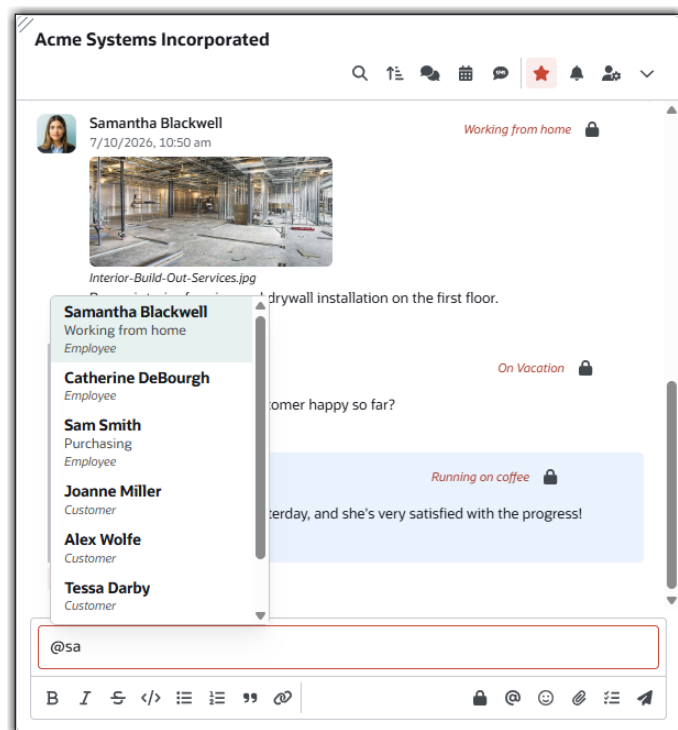
To tag a user in a bluChat message, follow these steps.

1. In the text input box, type @ or click the @ button. A list of taggable users appears.

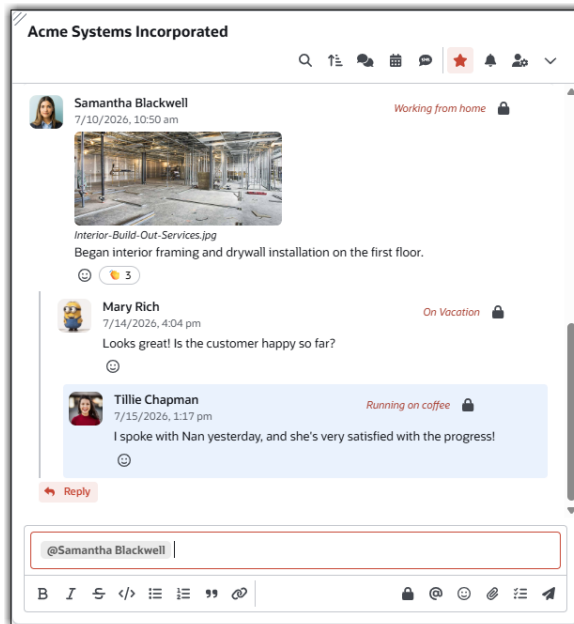


The list of taggable users includes both user names and user aliases. You can search for a user by either user name or alias.

Depending on your profile settings, you may see each user's user types and title, which can help you find the correct contact. This is particularly useful if there is more than one contact with the same name.



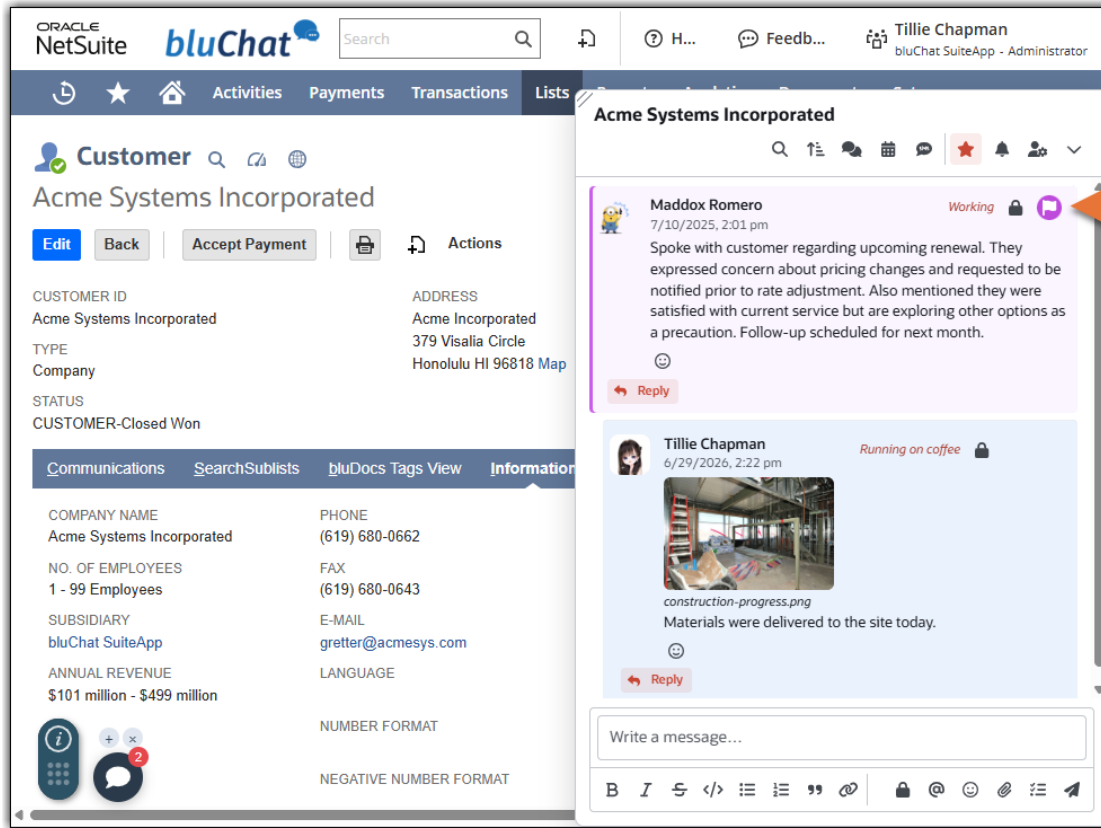
2. Select the user you want to tag by clicking their user name. If you typed @, you can also continue typing the desired user name to further refine the list of names. When the user's name is highlighted in the list, press **Enter** to select the user and apply the tag.



3. Continue typing your chat message. When you are ready to send the message and notify the user, press **Enter** or click **Send**.

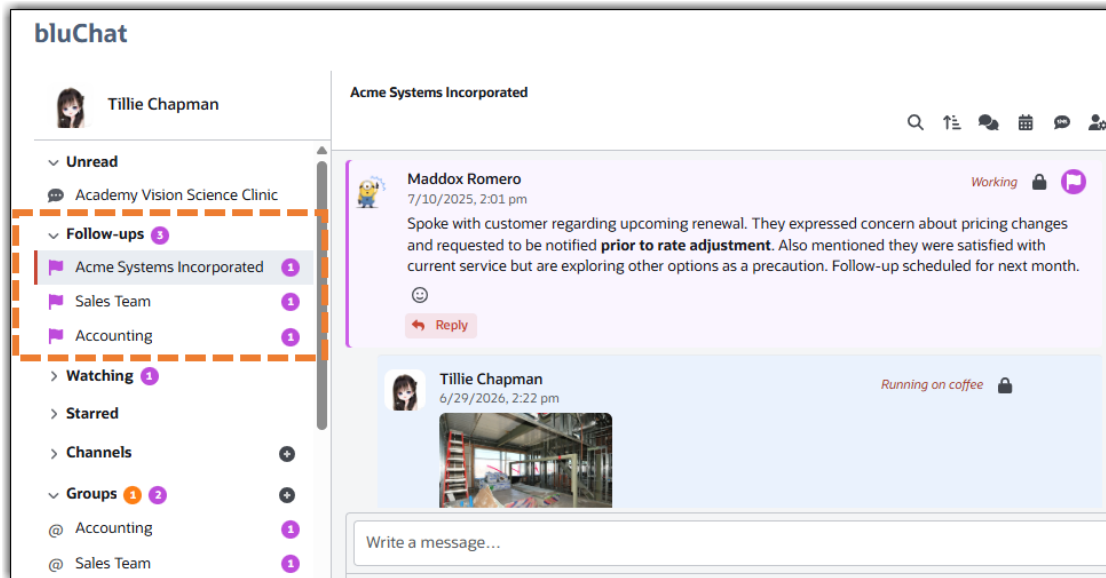
Flagging a Message for Follow-Up

Sometimes while you're working in NetSuite, you may be too busy to answer a question or follow up on a message immediately. Flagging a message for follow-up provides an easy way for you to find and return to a chat later, when you have more time to respond.



The screenshot displays the Oracle NetSuite bluChat interface. On the left, the 'Customer' profile for 'Acme Systems Incorporated' is shown, including details like Customer ID, Address, Type, Status, and various contact information. The main chat window on the right shows a conversation with 'Acme Systems Incorporated'. The chat history includes a message from 'Maddox Romero' dated 7/10/2025, 2:01 pm, which is currently marked as 'Working' (indicated by a purple square icon with a white 'W'). An orange arrow points to this 'Working' icon. Below it is a message from 'Tillie Chapman' dated 6/29/2026, 2:22 pm, which includes an image of construction progress. The chat interface also features a search bar, navigation tabs (Activities, Payments, Transactions, Lists), and a bottom toolbar with various communication and formatting tools.

When you flag a message for follow-up, the related chat, channel, group, or direct message automatically appears on the bluChat Messages page in the **Follow-ups** section. Chats remain in this section until you remove the follow-up flag from the message.

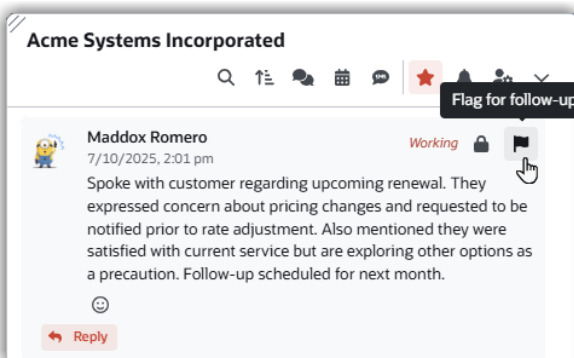


Additionally, the bluChat Messages page includes a follow-up badge next to each chat, indicating the number of messages in the chat that you have flagged for follow-up.

Flagging all the messages that need your attention later is an easy way to batch your follow-up tasks for increased productivity. Instead of finding and opening each individual record that needs follow-up, you can find them all in one place when you are ready to tackle them.

Flagging a Message

To flag a message for follow-up, click the flag in the upper-right corner of the message.



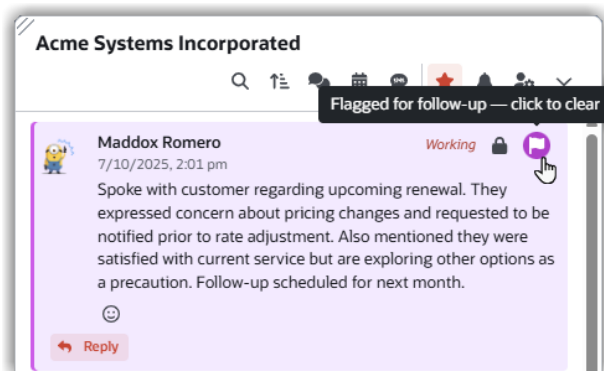
The flag icon is visibly marked with a circle around it, and the message is highlighted in purple, giving you a visual indicator that the message is successfully flagged.

The chat is now available in the **Follow-ups** section on the bluChat Messages page.

Clearing a Follow-up Flag

After you review a flagged message and complete any follow-up actions, you can clear the follow-up flag. This immediately removes the chat from the **Follow-ups** section on the bluChat Messages page.

When you are ready to clear the follow-up flag, click the purple flag icon. The highlighted, flagged message returns to its normal state, giving you a visual indicator that the flag is successfully cleared.



Replying to a bluChat Message

Any bluChat user can reply to a message. Replies display in a thread underneath the original message, in chronological order.

Reply Notifications

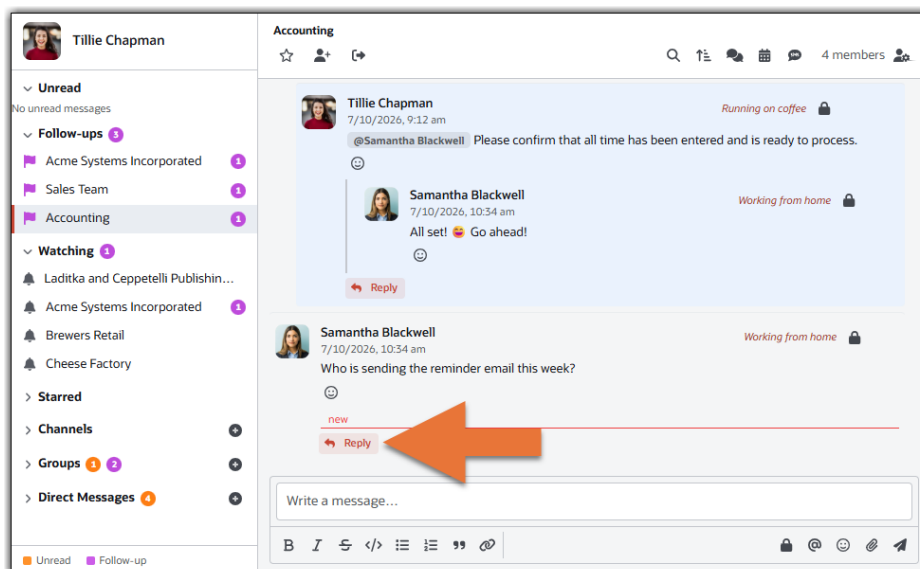
All users, including tagged users, receive an unread message alert within the reply message's parent record and its reply messages. This notification appears in the user's badge notification and the unread messages section of the bluChat Messages page.

The reply notification type does not send user notification emails. To notify a user of a reply via email, you must tag the user you want to notify.

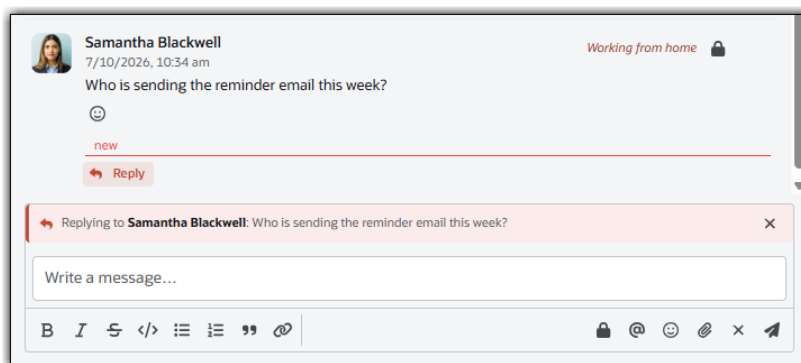
Replying to a Message

To reply to a user's message, follow these steps.

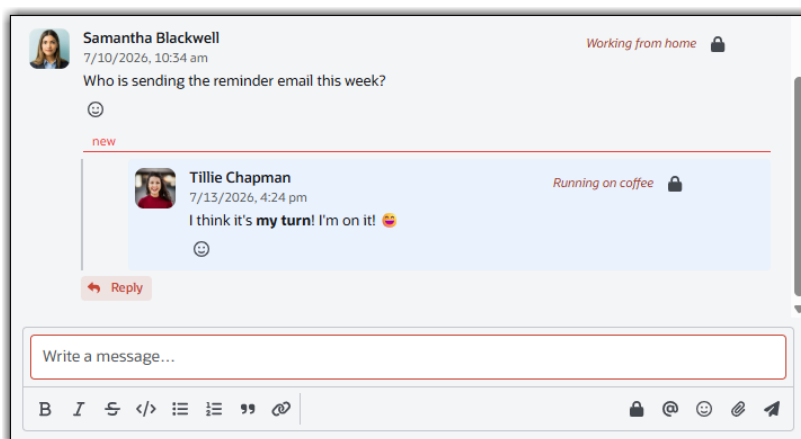
1. At the bottom of the message, click the **Reply** link.



The message entry editor text box appears, with a *Replying to...* message that makes it clear you are replying to someone directly. If you need to cancel your reply without sending it, click the **x** button in the corner of the *Replying to...* message.



2. Type a reply message and click **Send**. The reply appears in a thread under the original message.



Any bluChat user can create additional replies, and all replies appear under the original message in chronological order.

Replying to a bluChat Message Via Email

If your company has enabled email replies, you can reply to a bluChat mention notification email directly from your email inbox, and your reply is added to the conversation in bluChat.

Note: This feature is available only if your company has enabled email replies. If you reply to a notification email and don't see your message appear in bluChat, check with your administrator to confirm this feature is on in your company's account.

How Email Replies Appear in bluChat

When your reply reaches bluChat, it is added to the thread as a new message, the same as if you'd typed it directly into the chat window.

What's Included from Your Email Reply

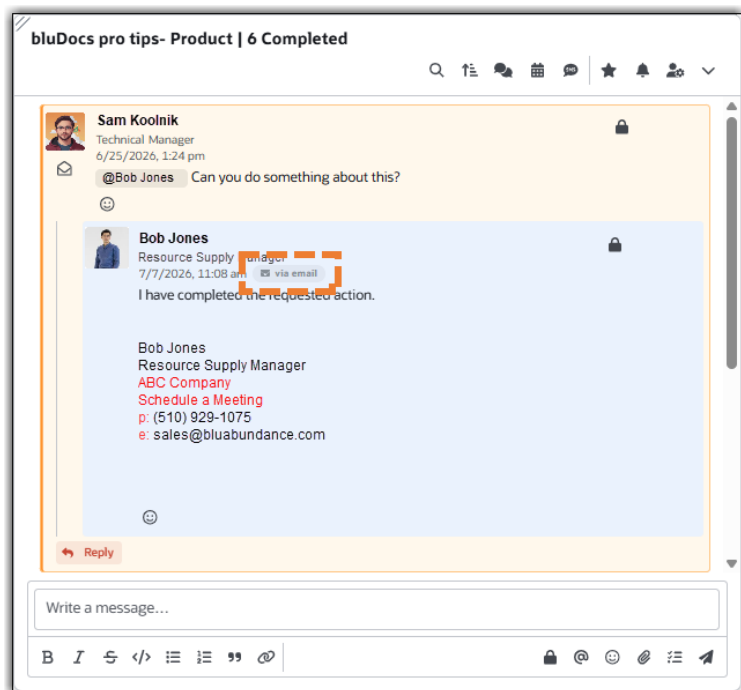
Only the text you type above the *Reply above this line* marker is sent back to bluChat as your message. bluChat formats this text as rich text, so any bold, italic, or other formatting from your reply carries over into the chat stream.

What Isn't Included From Your Email Reply

Before your reply from email appears in the chat stream, bluChat automatically removes email elements, including the following.

- Quoted or original message text carried over from the email thread
- Forwarded message headers
- Your email signature formatting

Removing email formatting keeps your chat reply clean and readable in the chat stream, showing just the message you typed.



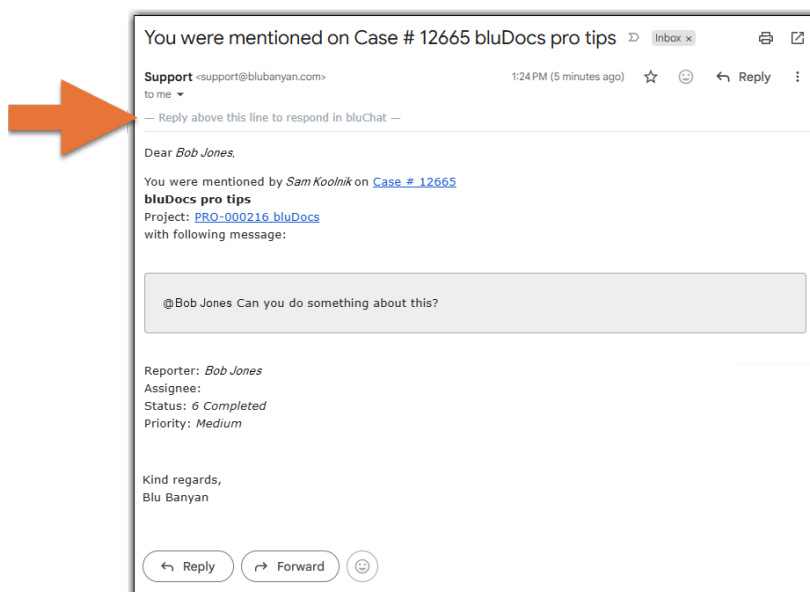
Understanding the "Via Email" Badge

Messages sent as a reply to an email notification display a *via email* badge next to the timestamp. This badge lets everyone in the conversation know the message came in through email rather than being typed directly in bluChat.

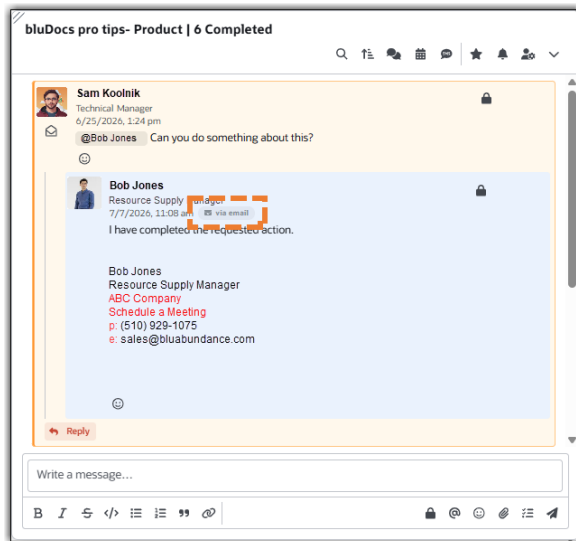
Replying to an Email Notification

To reply in bluChat from an email notification, follow these steps.

1. Open the notification email for the bluChat message that tagged you.
2. Use your email application to open a reply to the email, as you normally would.
3. Type your reply above the *Reply above this line* marker in the email.



4. Send your reply. Your reply appears in the bluChat thread as a new message.

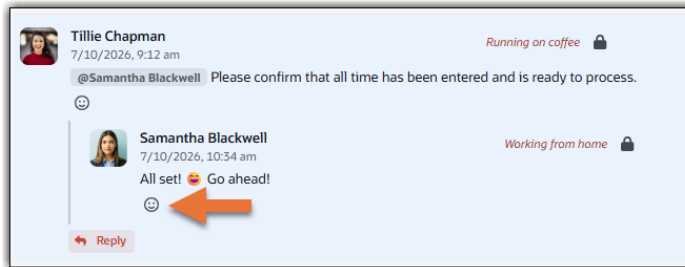


Reacting to a Message Using an Emoji

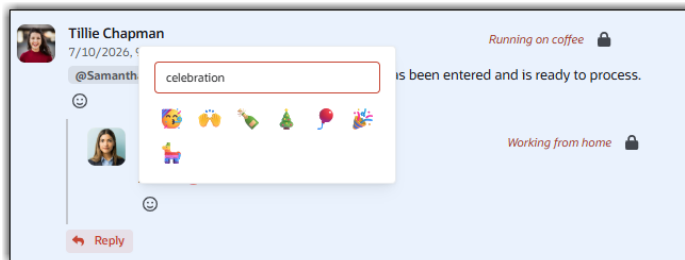
You can react to bluChat messages using an expressive emoji that appears underneath the bluChat message. You can react multiple times with different emojis on the same message. You cannot react more than once with the same emoji.

To react with an emoji, follow these steps.

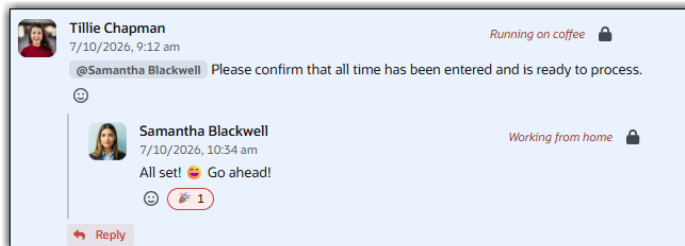
1. On the message you want to react to, click the **Emoji Reaction** icon.



2. Find an emoji in the pop-up window, or use the search bar to search for a specific emoji in the list.

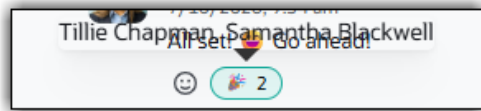


3. Click the emoji to apply it. Your reaction appears under the message.



Viewing Users' Emoji Reactions

The number that appears next to an emoji indicates the number of users who have reacted with that emoji. Using your mouse, hover over an emoji reaction to see a list of people who reacted with the same emoji.



Removing Your Reaction

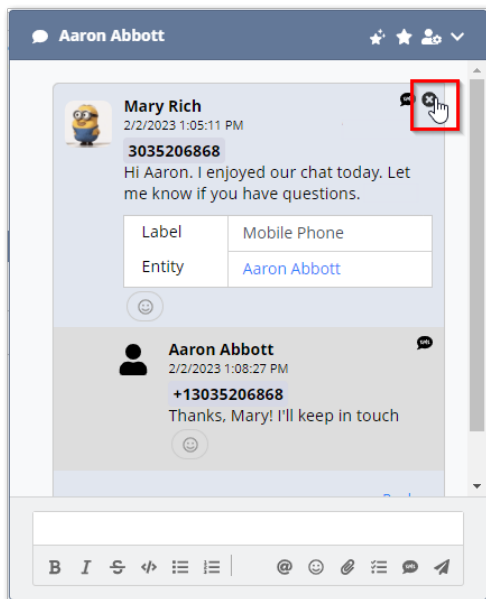
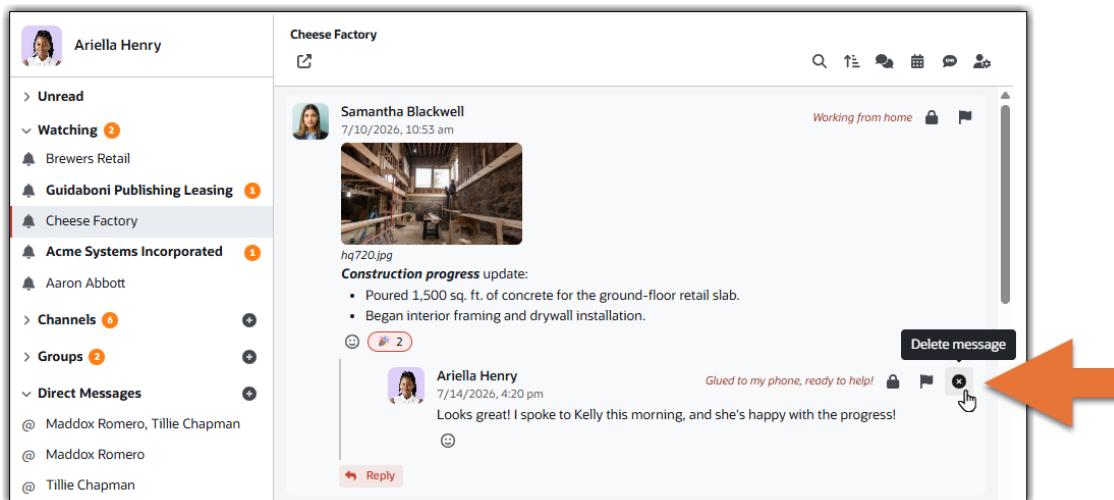
Clicking your reaction emoji removes your own reaction with that emoji, but retains any other users' reactions with the same emoji.

Removing a Message From the Chat Stream

The user who sent a chat message (the *message owner*) can delete a message from the chat stream.

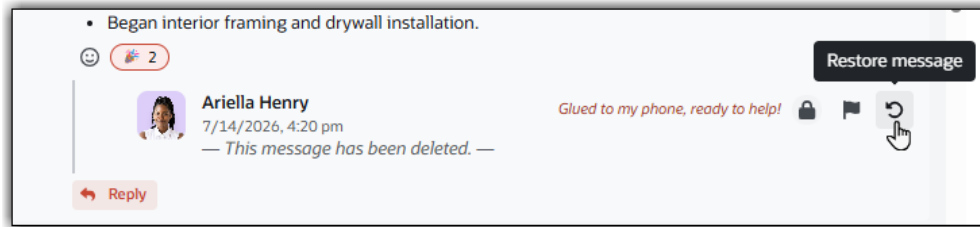
Deleted messages continue to appear in bluChat with an indicator that the message was deleted. When a threaded message is deleted, any parent and child messages that have not been deleted appear as usual in the chat stream.

To remove a message from the stream, click the **Delete**  icon in the top-right corner of the chat message.



Restoring a Deleted Message

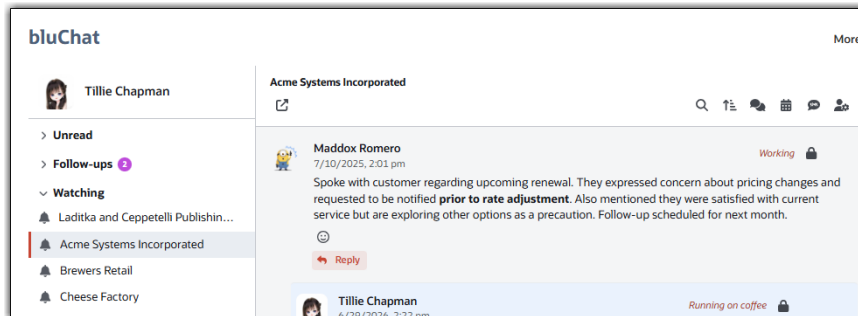
The message owner can restore any messages they have deleted by clicking the **Restore** icon that appears on the deleted message.



Watching a Chat

Watched chats are chats you star on a NetSuite record. Watching a chat provides an easy way for you to save an important chat for easy access later, without needing to open the record.

Watching an on-record chat adds it to your bluChat Messages page, where you can monitor new activity. The chats in the **Watching** section include badges for unread messages in the chat, allowing you to quickly see when there are new messages, even if you are not tagged directly.



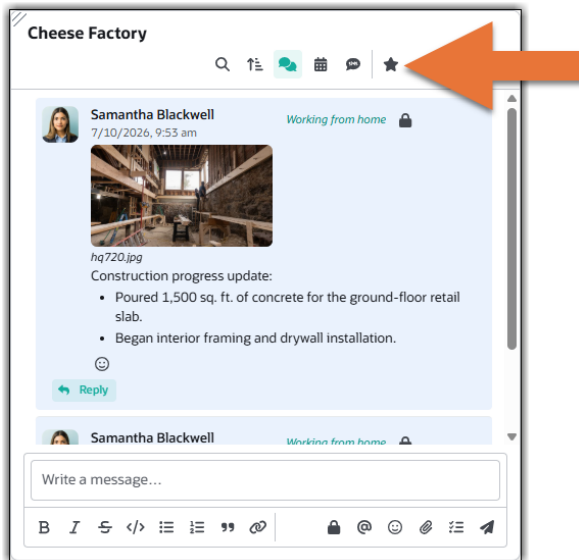
You do not receive email notifications for new messages in a watched chat unless someone specifically mentions you. Watching a chat simply allows you to keep track of conversations that matter to you and catch up on chat activity at your own pace, even when you are not actively participating in a conversation.

Examples

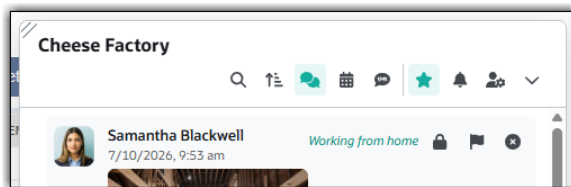
- If you want to be aware of new messages on a specific project chat, watch the chat on the project record.
- If you want to be aware of new messages on a customer record, watch the chat on the customer record.
- If you want to be aware of new messages on a sales order, watch the chat on the sales order.

To watch the chat for a specific record, follow these steps:

1. Navigate to the record.
2. In the top right corner of the bluChat box, click the **Star** icon to receive unread message notifications for the current record's chat.



As an indicator to let you know you are watching a chat, the **Star** icon appears highlighted. The record's chat is immediately added to the [bluChat messages page](#) in your **Watching** section. Every new message posted in that watched chat shows up as an unread message and contributes to your unread badge count.



Unwatching a Chat

The **Star** icon appears highlighted when you are watching an on-record chat. To unwatch the chat and remove it from your bluChat Messages page, click the **Star** icon to clear it.

Subscribing to a Record Type

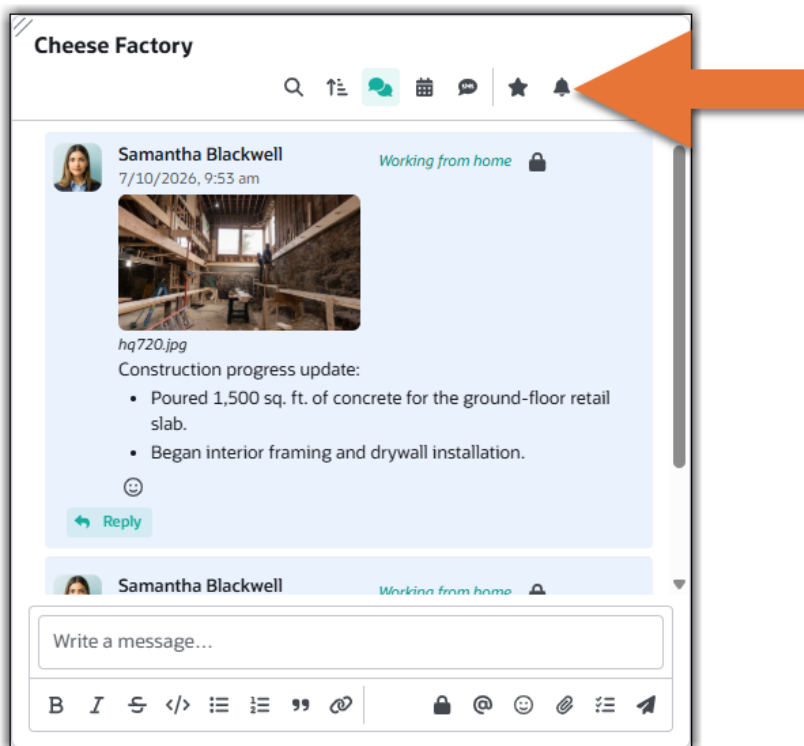
When you subscribe to a record type, you receive unread message notifications for any bluChat messages on that records of that type.

Examples

- For new message notifications on all sales orders, subscribe to the sales order record type.
- For new message notifications on all customer records, subscribe to the customer record type.

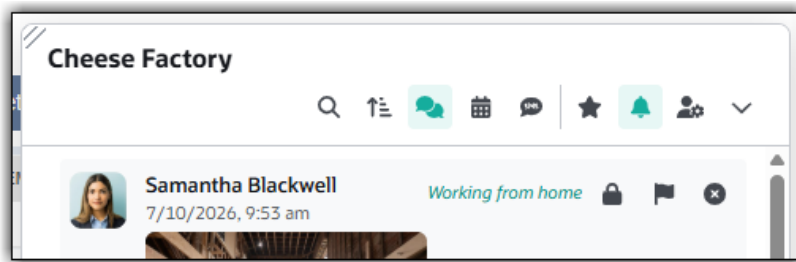
To subscribe to a record type, follow these steps.

1. Navigate to the type of record you want to subscribe to, for example, a Customer or Sales Order.
2. In the top right corner of the bluChat box, click the **Bell** icon to receive unread message notifications for the current record type.



As an indicator to let you know you are subscribed to a chat, the **Bell** icon appears

highlighted when you subscribe.



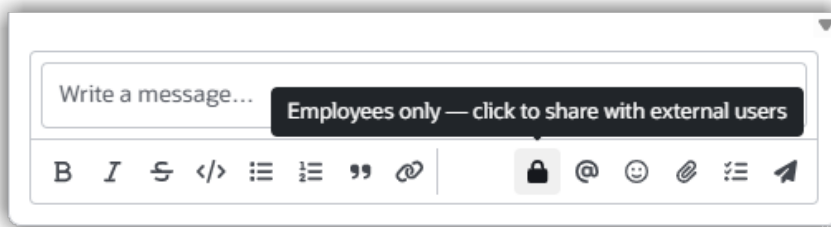
Unsubscribing From a Record Type

The **Bell** icon appears highlighted when you are subscribed to a record type. To unsubscribe from bluChat message notifications for a record type, click the **Bell** icon to clear it.

Filtering External User Messages

Filtering External User Messages is an optional feature for companies that extend the use of bluChat to external users, either in NetSuite or through bluPortal. This feature lets your company easily control which bluChat messages are visible to external users, such as Partners, Contacts, Customers, and Vendors. Employees can mark individual messages as either *Internal* or *External* within the same chat stream, keeping all conversations in one place.

When this feature is enabled, an **Internal/External** toggle is available to internal (employee) users on the bluChat window and every bluChat message. Only Employee users can see the toggle. External users do not have access to the toggle, as the messages they see are always external.



When this feature is enabled, the following rules apply to all bluChat messages:

- ▶ External bluChat users can see only the bluChat messages that are marked *External*. A message must be marked *External* to appear to a Partner, Contact, Customer, or Vendor through bluChat.
- ▶ If your company uses bluChat's external client-portal embed to give customers access to bluChat outside of NetSuite, such as in bluPortal, this same **Internal/External** toggle also controls the messages that portal users can see. A message must be marked *External* to appear in the portal embed.

Note: This feature does not impact internal (Employee) bluChat users' access to chat messages.

Setting a Message as External

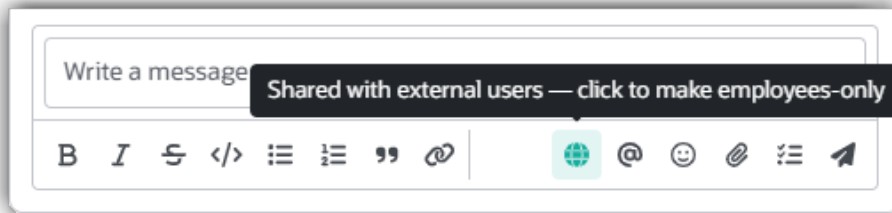
The toggle is set to *Internal* by default. Employee users can share a chat message externally in two ways:

- Manually set a message as external by clicking the toggle.
- Automatically set a message as external by mentioning an external user.

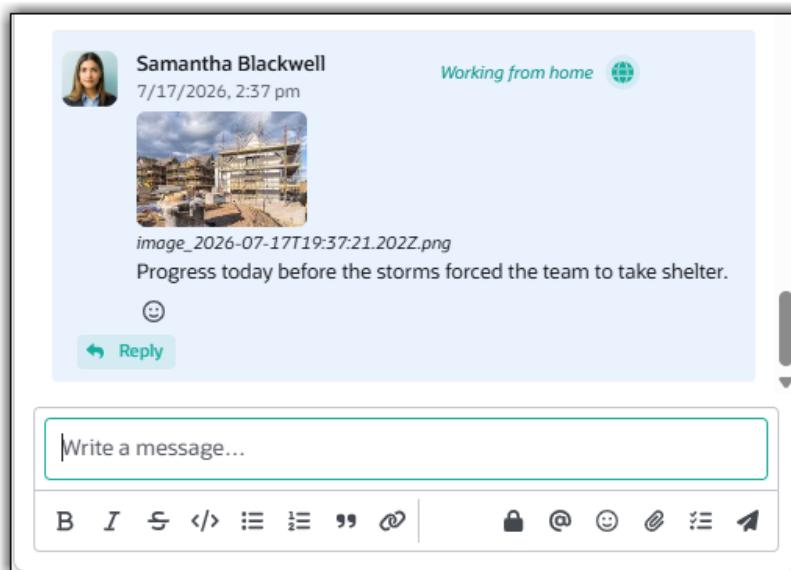
Using the External Toggle

To manually set a message as external using the toggle, follow these steps.

1. On the chat window, click the **Lock** icon that indicates the message is internal only. The toggle immediately switches to *External* and turns into a **Globe** icon, indicating that this specific message will be sent externally.



2. Type and send your message. When your message is added to the chat stream, the **Globe** icon appears in the upper-right corner, indicating an external message.

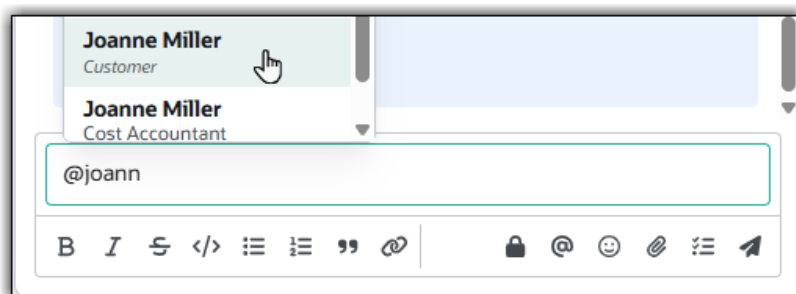


Note: The toggle switches back to *Internal* after your message is sent, helping to prevent you from accidentally sharing your next message externally.

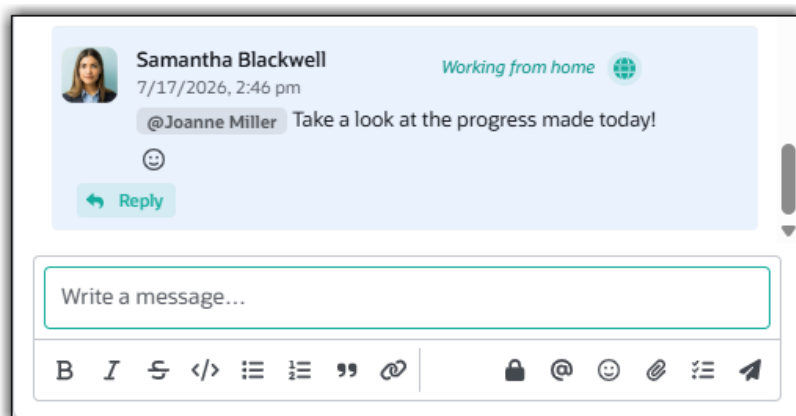
Mentioning an External User

To automatically set a message as external by tagging an external user, follow these steps.

1. On the chat window, click the Mention icon or type @.



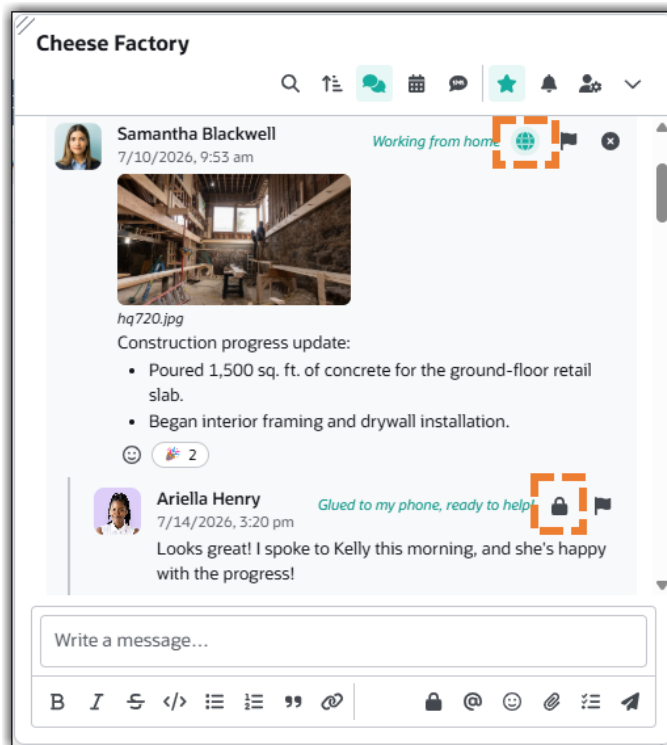
2. Click or press **Enter** to select the external user you want to tag.
3. Type and send your message. When your message is added to the chat stream, the **Globe** icon appears in the upper-right corner, indicating the message was automatically set to external.



Setting a Message to Internal/External After it is Sent

Occasionally you may need to change the audience of a message after it is sent. For example, if you accidentally set a message as internal when you meant to share it with the customer, you can share it after it gets sent.

To change the audience of a message, find the message in the chat stream and click the **Internal/External** toggle. The audience of the message immediately switches.





SMS Notifications and Usage (Internal Users Only)

If your company has upgraded bluChat to include SMS functionality, internal company users can opt-in to receive notifications via SMS text message on their mobile phone when they are tagged in a bluChat message.

Users opt in to SMS messaging through their user profile by clicking the **SMS Opt-In** checkbox, entering a valid **Mobile Phone** number, and clicking **Save**.

When users opt in,

- Users receive an SMS text message notification in addition to the standard email notification when tagged in a chat.
- Replies sent via text message are sent back to the most recent chat stream notification received.
- Only text messages or emojis may be sent as SMS notifications. Image or file messages will not be sent as text notifications.

Sending SMS Text Messages to External Entities

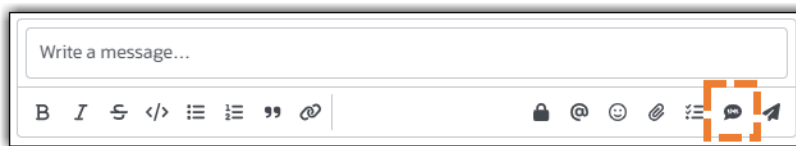
If your company has upgraded bluChat to include SMS functionality, internal company users can send and receive SMS text messages with external entities, such as Customers and Partners.

To send SMS messages to users external to your company, follow these steps.

1. Go to any record with a **Phone Number** field.

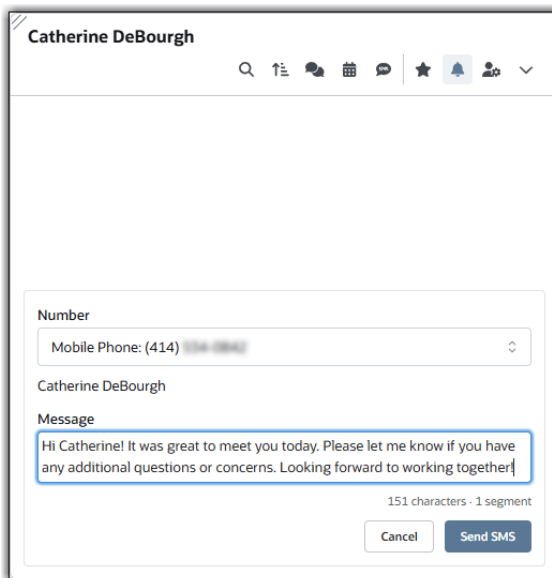
Note: The phone numbers listed must be attached to an entity—Customer, Partner, Contact, Vendor, etc.—somewhere in the system.

2. On the bluChat window, click the **SMS** icon.

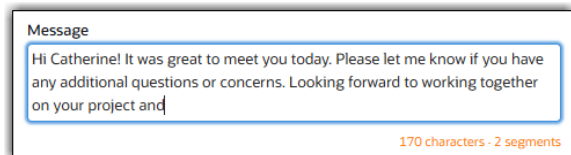


3. When the SMS window opens, select a phone number from the **Number** dropdown and type your message in the **Message** box.

Note: The SMS window detects all valid 10-digit phone numbers on the record and shows them in the **Number** dropdown. Be sure the number you select is for a mobile phone.

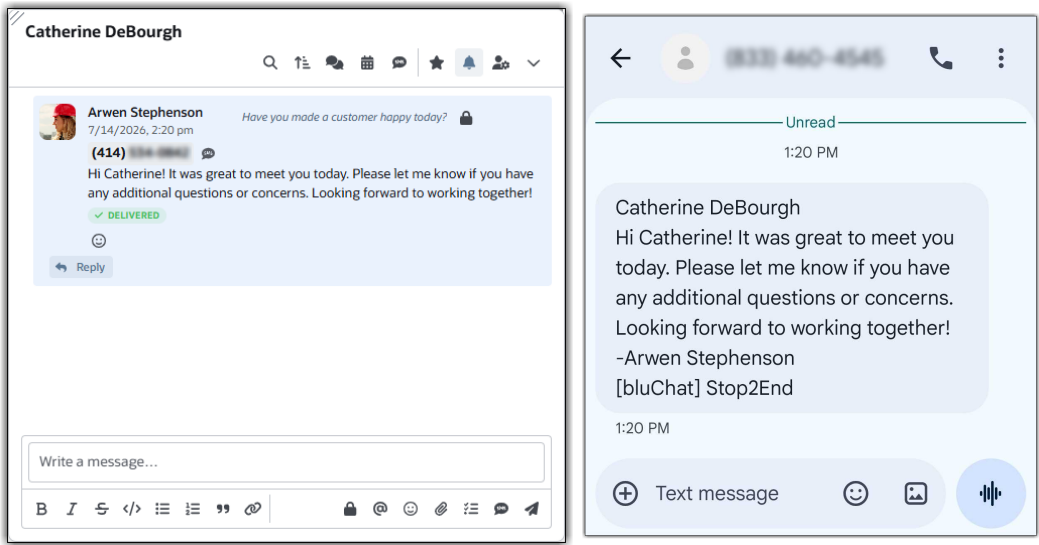


As you type your message, a character count keeps track of the message length and provides an indicator of the number of segments you are sending.



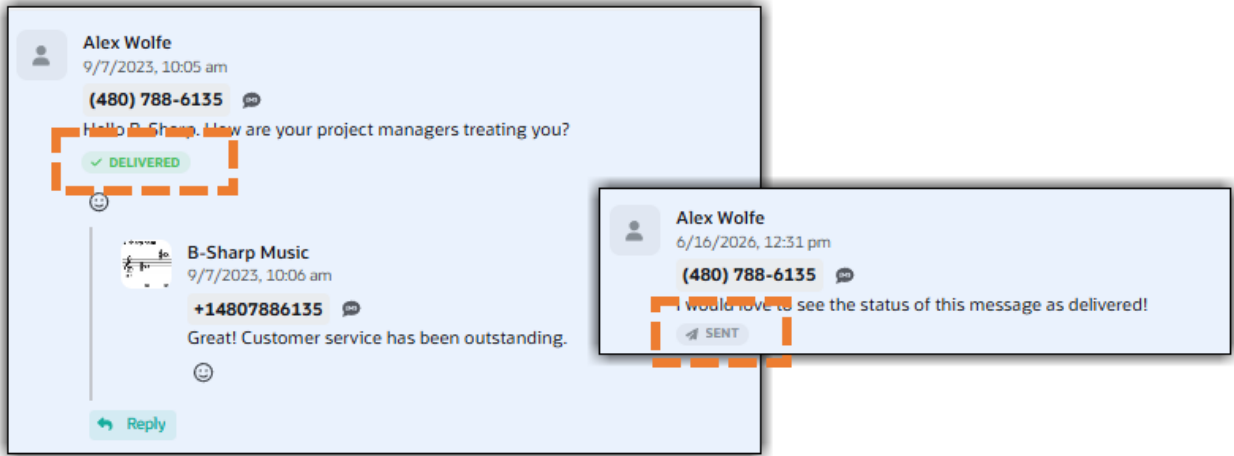
Segments determine usage. If you send multiple segments, bluChat charges for multiple SMS messages. You can reduce the character count or cancel the message at any time before sending.

4. When you are ready to send the SMS text message, click **Send SMS**. The message is sent to the phone number using the template and details your company has configured in SMS setup.



Message Delivery Status

If your company has enabled SMS message delivery status, sent messages show a **Sent**, **Delivered**, or **Failed** status badge.



Status	Details
Sent	bluChat submitted the message to the SMS provider. This confirms the message was sent, not that it reached the recipient.

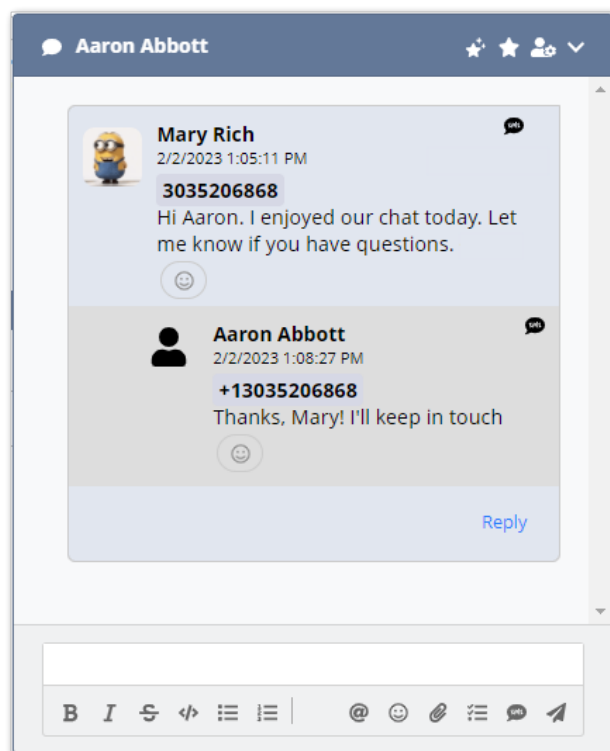
Status	Details
Delivered	The recipient's carrier confirmed the message reached the phone.
Failed	The message could not be delivered, for example, because of an invalid number or a carrier rejection.

Important: Some carriers and phone number types, such as Google Voice numbers, report only as far as *Submitted* and never send a final delivered or failed status. In these cases, the message badge correctly remains at *Sent*.

This is a carrier and MessageMedia limitation, not a bluChat issue.

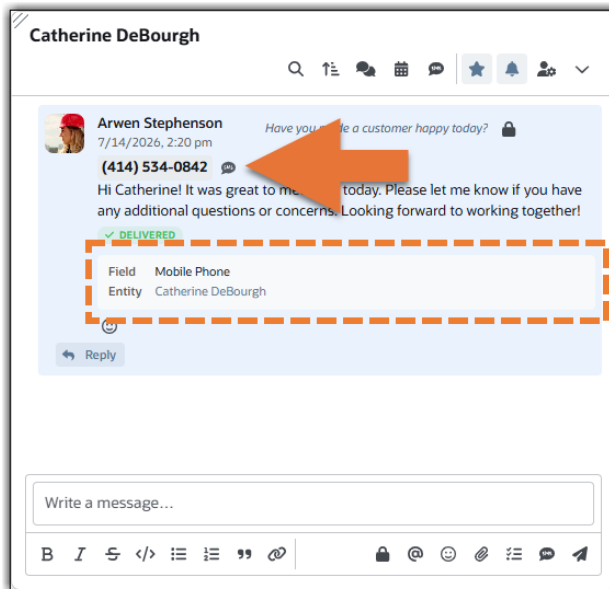
External SMS Message Replies

The person receiving the text can reply to you using their mobile phone's text messaging app. The bluChat app captures the SMS conversation between the user and the external entity.



Reviewing SMS Message Details

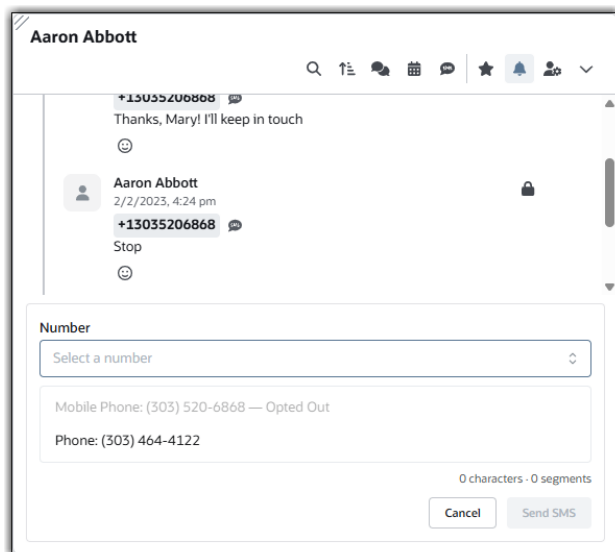
To see a message's technical details, click the **SMS** icon in the message display.



Opting Out

The entities you send SMS text messages to can opt out of future texts at any time by responding to an SMS bluChat message with *Stop*. They can also opt back in at any time by responding to the SMS thread with *Unstop*.

For awareness, bluChat captures opt-out and opt-in messages in the message thread. Once a contact has opted out of SMS messaging, that phone number is unavailable to select for future messages.



Sorting and Filtering Messages

To help you find or review bluChat messages in the way that is easiest for you, you can sort and filter messages in various ways.

Sorting Messages

Three options control the sorting and threading of bluChat messages:

- Default Sorting
- Sort by Latest Reply
- Sort Chronologically

	Default Sorting	Sort by Latest Reply	Sort Chronologically
Replies	Threaded under the parent message	Threaded under the parent message	Uncoupled from the parent and appear as individual messages
Top > Bottom	Thread with oldest parent > Thread with newest parent	Thread with oldest reply > Thread with newest reply	Oldest individual message > Newest individual message
Example Chat Stream	09:00 Project update └─ 09:05 Looks good └─ 09:15 Approved 09:10 Budget question	09:10 Budget question 09:00 Project update └─ 09:05 Looks good └─ 09:15 Approved	09:00 Project update 09:05 Looks good 09:10 Budget question 09:15 Approved

Notes

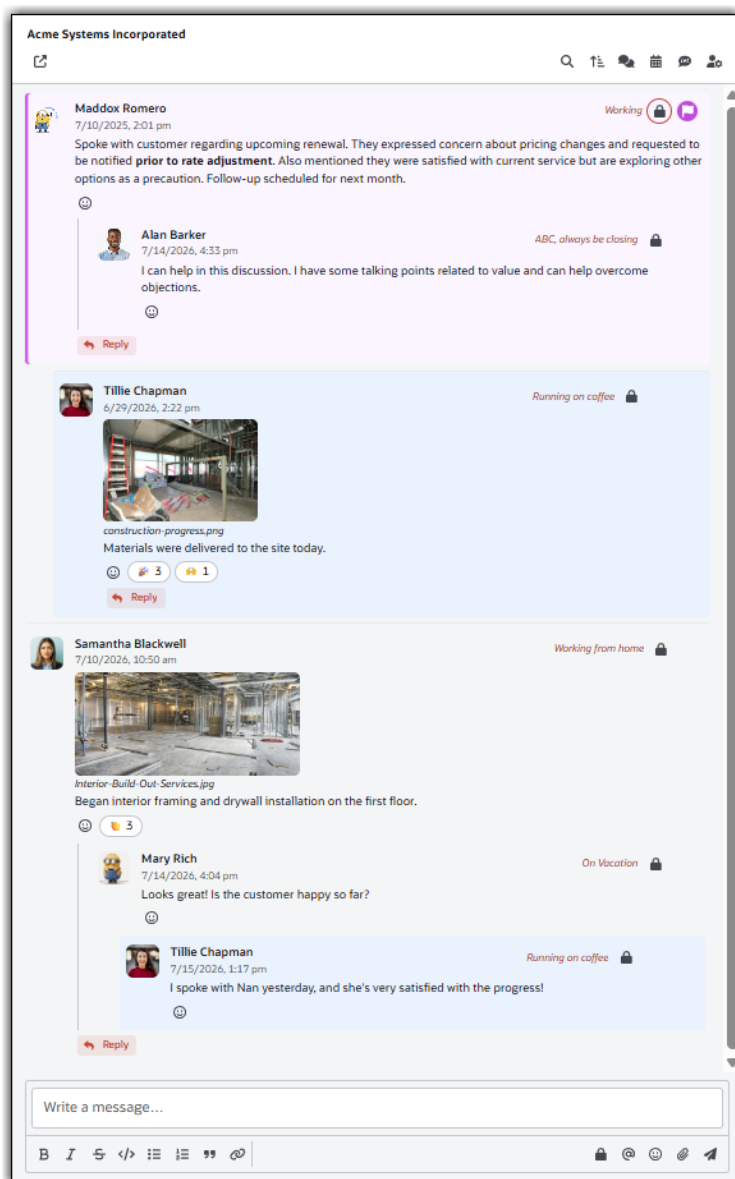
The three options are mutually exclusive:

- Selecting **Sort by Latest Reply** replaces Default Sorting and **Sort Chronologically**.
- Selecting **Sort Chronologically** replaces Default Sorting and **Sort by Latest Reply**.
- Toggling **Sort by Latest Reply** and **Sort Chronologically** *off* returns to Default Sorting.

Default Sorting

By default, standalone bluChat messages are added to the chat stream in the order that they were sent, and any direct replies to a message are added in a thread underneath the parent in the order that they were sent.

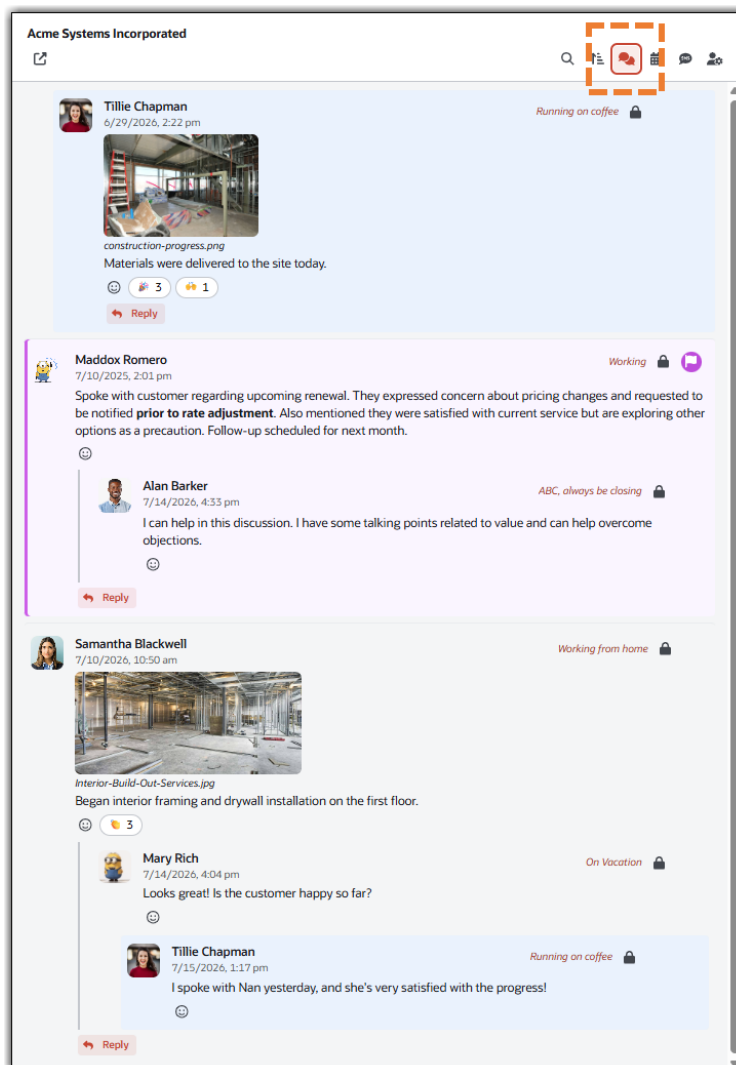
This sorting option keeps related messages and replies together, allowing you to follow conversations with full context.



Sort by Latest Reply

If you want threads with the most recent reply to move to the bottom so they're easier to find and catch up on, click **Sort by Latest Reply**. Replies stay grouped under their parent, but threads with the most recent reply move to the end.

This sorting option allows you to find active conversations quickly while following threads with full context.

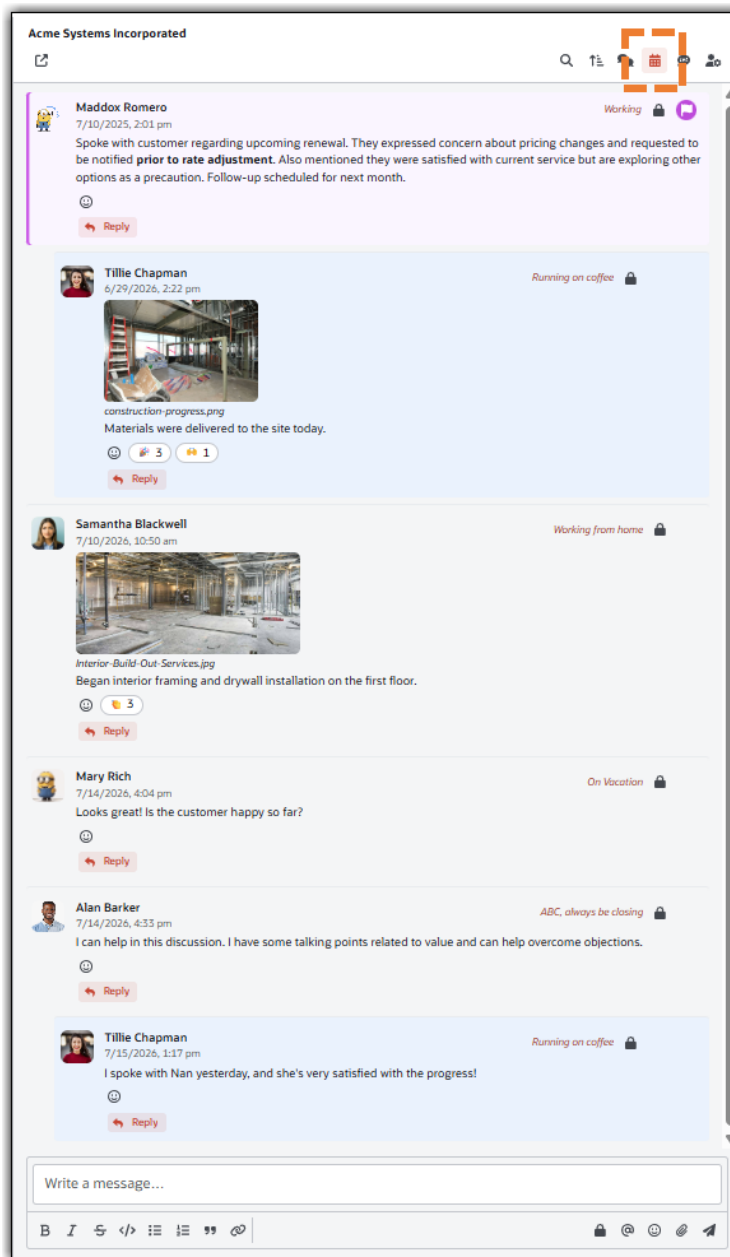


Sort Chronologically

If you want to uncouple replies from the parent message and see all messages in the order they were sent, click **Sort Chronologically**. Any messages that were sent within a thread are removed and appear as standalone messages.

This sorting option allows you to see the newest messages without locating threads.

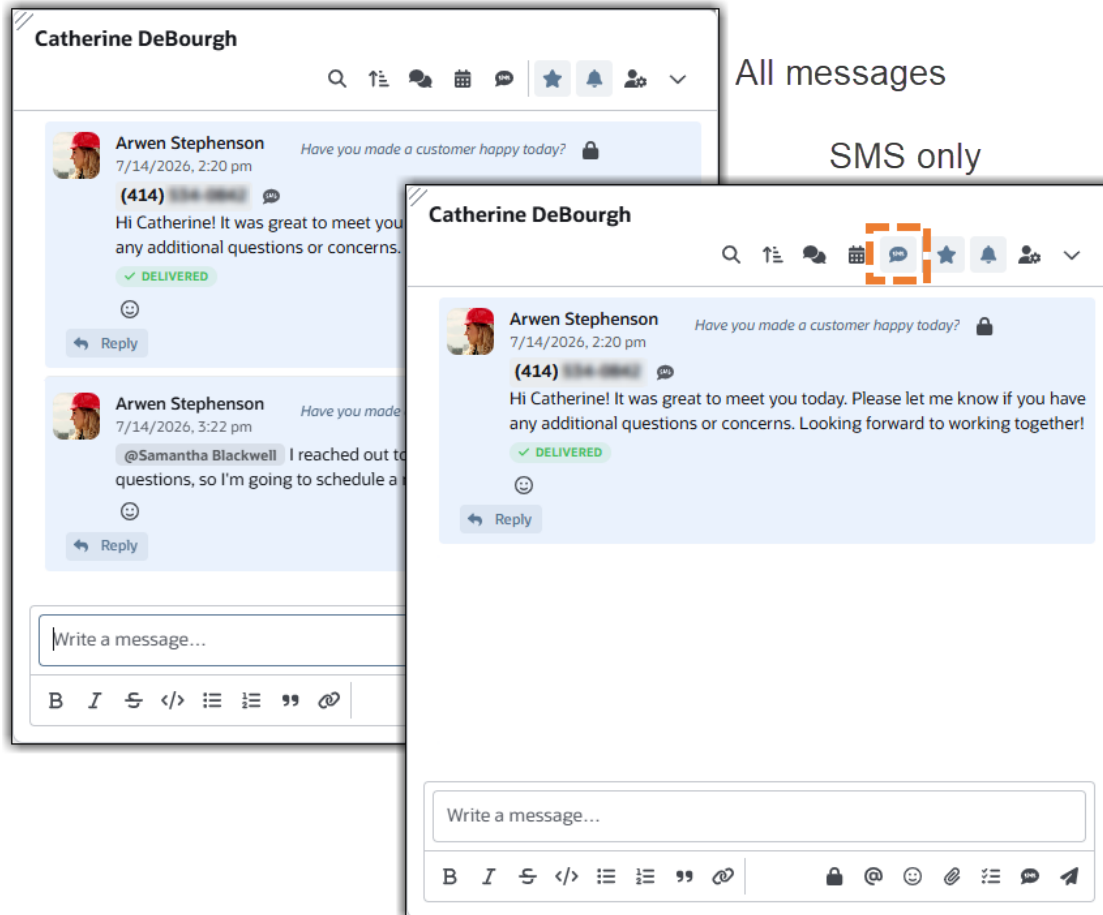
Note: It may not always be clear what someone is replying to when you are not able to see the previous messages in a thread above it.



Filtering SMS Messages

Filtering messages by SMS displays only those messages sent and received through SMS. This is useful if you need to figure out what communications have already been sent to a contact.

- To filter a bluChat window to show only SMS chat messages, go to the top-right corner of the chat window and click the **SMS** icon.
- To show all messages, click the icon again.



bluChat Channels, Groups, and Direct Messages

On the bluChat Messages page, users can chat in channels, groups, and direct messages. These chat streams are saved outside of specific records, but still within NetSuite.

- **Channels** are public, off-record chat streams that any internal company user can search for and join.
- **Groups** are two or more internal company users in a closed, off-record conversation that can be named.
- **Direct messages** are one-to-one, off-record conversations between two internal company users.

Important: All bluChat messages, even direct messages, can be searched and audited, and therefore are not private.

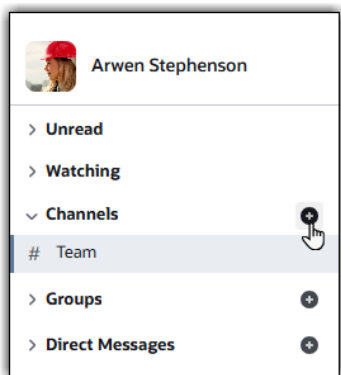
Working With Channels

Channels are message groups available for all your bluChat users. Any user can create, search, and join a channel.

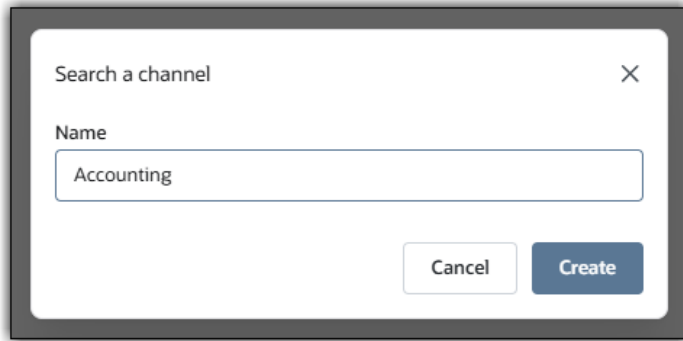
Creating a New Channel

To create a new channel, follow these steps.

1. Go to the bluChat Messages page.
2. In the left sidebar, locate the Channels section.
3. Click the **Add Channels** button. The Search a Channel window opens.

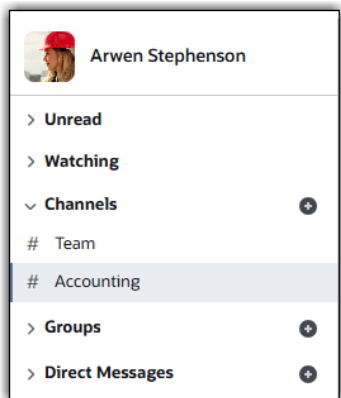


4. In the pop-up window, use the **Name** text box to type a name for the new channel.



A pop-up window titled "Search a channel" with a close button (X) in the top right corner. Below the title is a text input field labeled "Name" containing the text "Accounting". At the bottom of the window are two buttons: "Cancel" and "Create".

5. Click **Create**. The new channel is created immediately, and you are automatically added as a member. The new channel appears on your bluChat messages page in the **Channels** section, and it is available for anyone at your company to join.



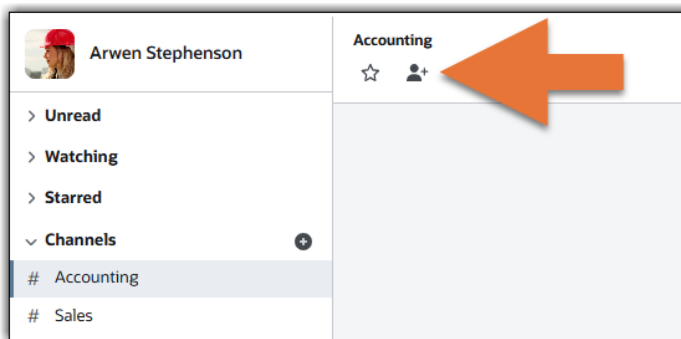
Adding Members to a Channel

You can add members to a channel by updating the channel membership directly, or by simply mentioning a user in a channel they do not already belong to.

Adding Users by Selecting Them

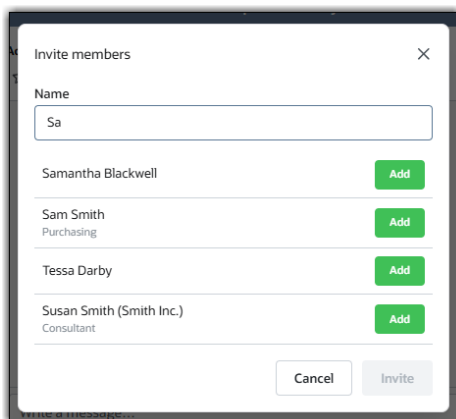
To add new members to a channel by manually updating the channel membership, follow these steps.

1. On the bluChat messages page, select the channel you want to work with.
2. In the channel header, click the **Invite Members** icon.



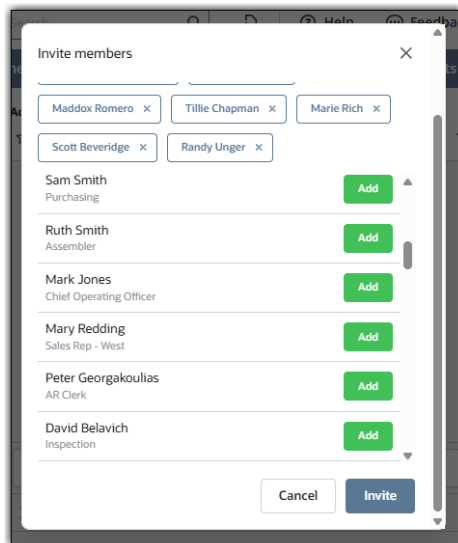
The Invite Members window opens.

3. On the Invite Members window, begin typing the name of the user you want to add. A list of suggested users appears and populates user name suggestions that are consistent with the characters you type.



4. Next to the user you want to add to the channel, click the **Add** button. The user you added is selected and placed on a list underneath the search bar.

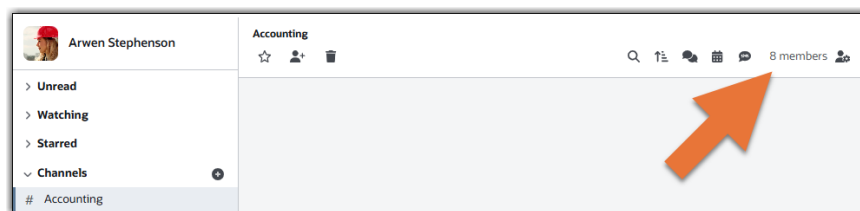
- Continue searching for and selecting any additional users you want to add to the channel. The users you select are added to the list of invitees under the search bar.



- Once you have selected all the users you want to add, when you are ready to add them to the channel, click the **Invite** button.

The selected members are immediately added to the channel.

- The channel appears on each member's bluChat messages page under **Channels**.
- The membership count in the upper-right corner of the channel is updated to reflect the new members.

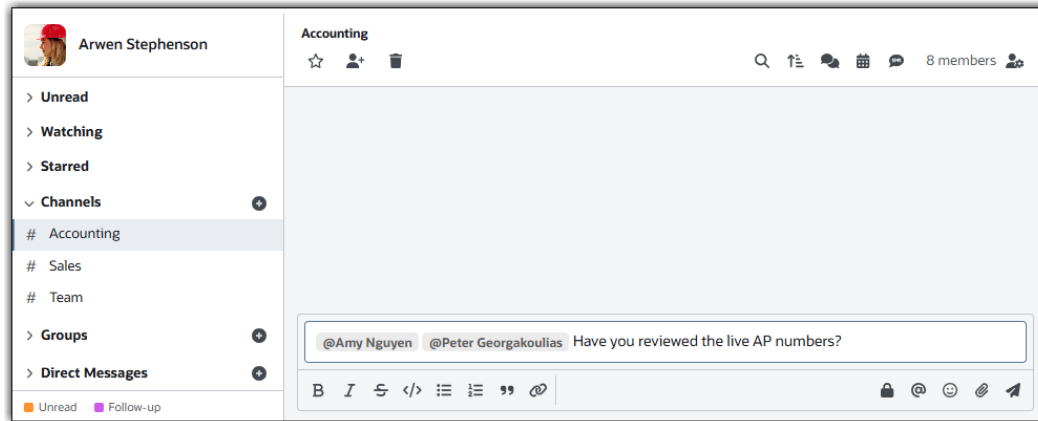


Adding Users by Mentioning Them

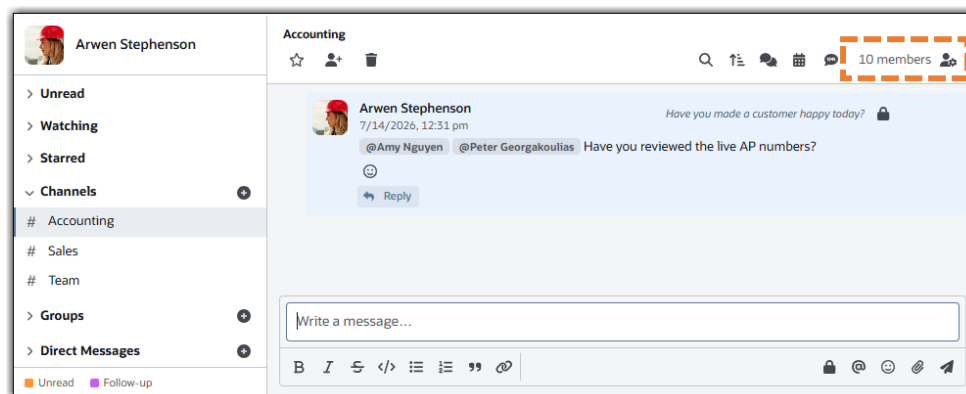
In addition to manually updating channel membership, an alternative way to add users to a channel automatically is to mention them in a new message.

To add new members to a channel by mentioning them, follow these steps.

- On the bluChat messages page, select the channel you want to work with.
- In the channel, draft your message. Use `@[user name]` to mention the user or users you want to add to the channel.



3. Send your message. When the message is sent, the users you mentioned are automatically added to the channel.
- The channel appears on each member's bluChat messages page under **Channels**.
 - The membership count in the upper-right corner of the channel is updated to reflect the new members.



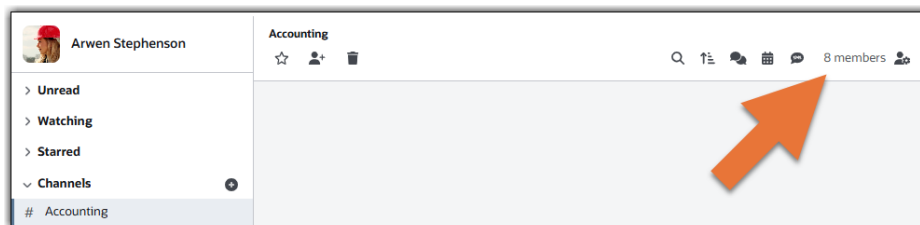
Removing Members from a Channel

The person who created a channel can remove members from the channel. The channel's creator cannot be removed.

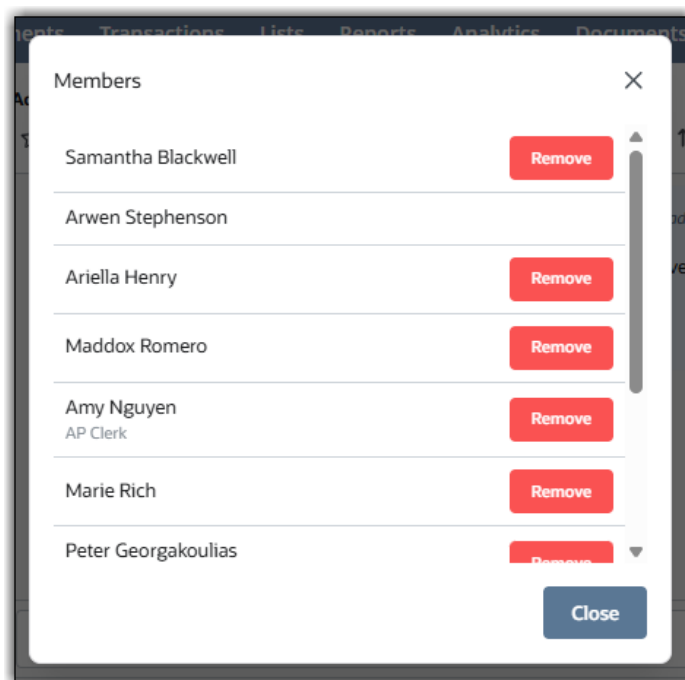
Note: bluChat automatically removes inactive or deleted entities from the channel when adding/removing other members.

To remove a member from a channel, follow these steps.

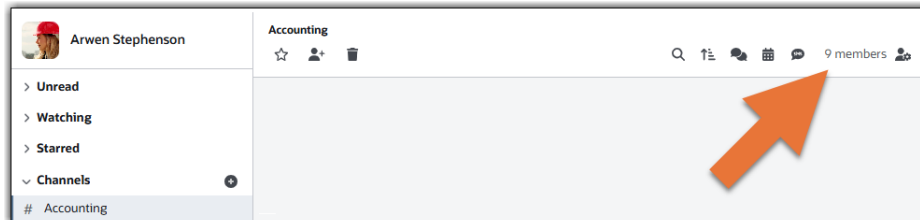
1. Click the **Show Members** link in the channel's header. The Members window appears.



2. In the Members window, scroll through the list of members until you find the user you want to remove from the channel.



3. Next to the name of the member you want to remove from the channel, click **Remove**. The member is immediately removed from the channel. The channel is removed from the member's bluChat messages page under **Channels**.
4. When you are finished removing members, click **Close**. The membership count in the upper-right corner of the channel is updated to reflect the removed members.

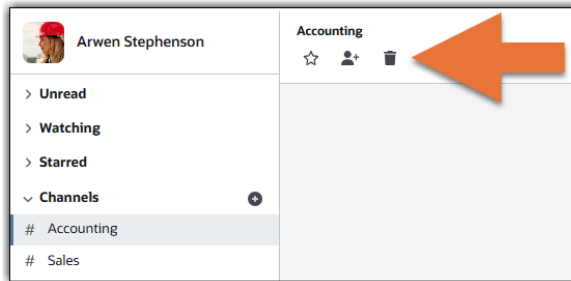


Deleting a Channel

Only Administrators or the channel's creator can delete a channel.

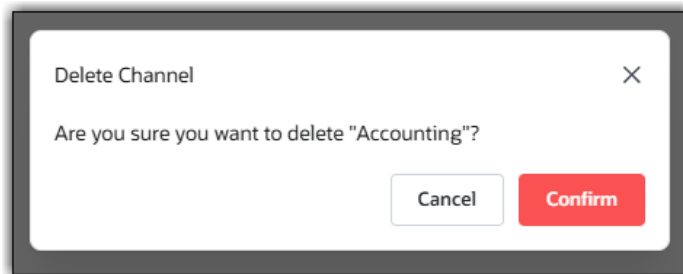
To delete a channel, follow these steps.

1. On the bluChat messages page, select the channel you want to delete.
2. Click the **Trash Can** icon in the header of the channel.

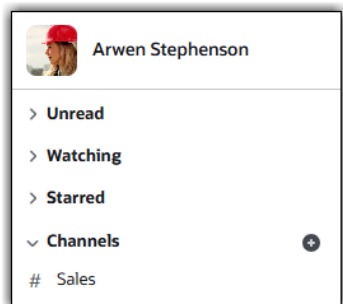


A message appears, asking you to confirm you want to delete the channel.

3. When you are ready to delete the channel, click the **Confirm** button.



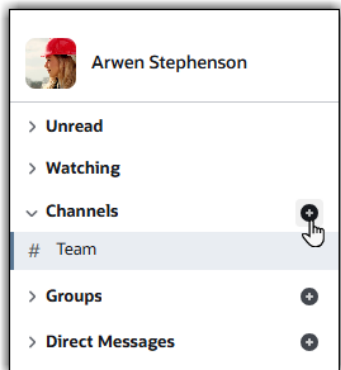
The channel is immediately deleted and removed from the available public channels in your company's bluChat. It is removed from your **Channels** list on the bluChat messages page.



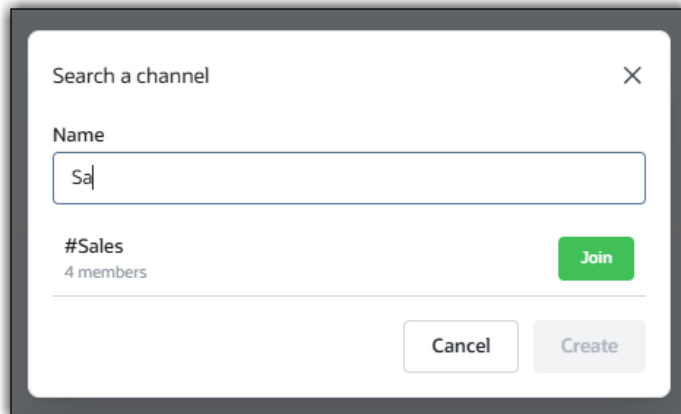
Joining an Existing Channel

If you want to join a channel, follow these steps.

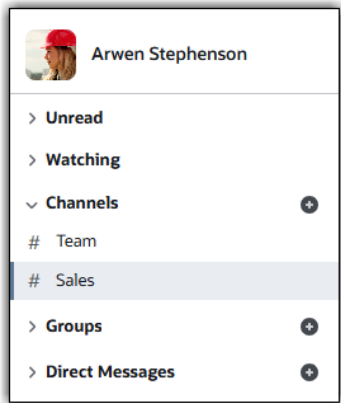
1. Go to the bluChat Messages page.
2. On the left sidebar, locate the Channels section.
3. Click the **Add Channels** button. The Search a Channel window opens.



4. Scroll through the list of channels, or use the search box to begin typing the channel name. As you type, a list of existing channels appears based on the characters you type.



5. When you find the channel you want to join, click the **Join** button next to the channel. You are immediately added to the selected channel, and it appears on the bluChat messages page under the **Channels** section.



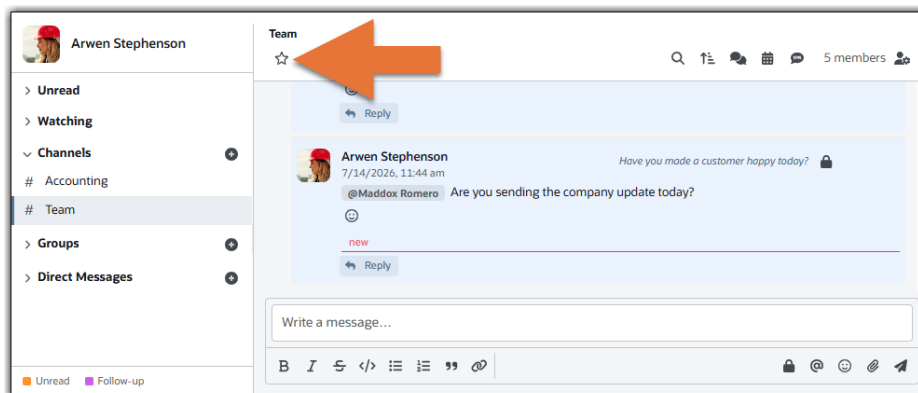
Starring Channels

When you star a channel in bluChat, you mark it as a favorite so it's easier to find and get back to. Starred chats are grouped together in a dedicated **Starred** section in your sidebar, keeping your active conversations in a consistent, easy-to-reach spot.

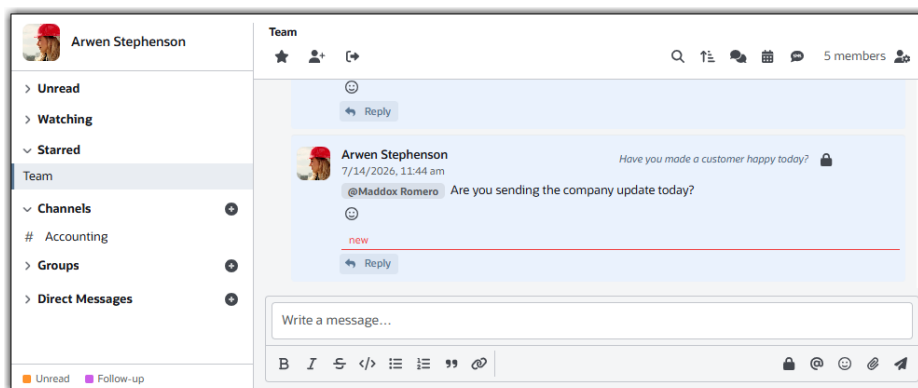
Starring is purely an organizational shortcut and doesn't change notification badges for the channel. Starring is the best way to curate your sidebar around the handful of channels you use regularly day, so the noise of the less active channels doesn't get in your way.

To star a channel, follow these steps:

1. Go to the bluChat messages page.
2. In the left sidebar, select the channel.
3. At the top of the chat, click the **Star** icon.



The **Star** icon is highlighted, and the channel is moved from the **Channels** section to the **Starred** section on the bluChat messages page, where you can easily find and work with it.



Unstarring a Channel

When you star a channel, the channel it appears in the **Starred** section on the bluChat messages page, and the **Star** icon is highlighted at the top of the chat.

If you want to remove the channel from your starred chats, click the **Star** icon next to the channel name to clear it.

The channel is immediately moved from the **Starred** section back to the **Channels** section on the bluChat messages page.

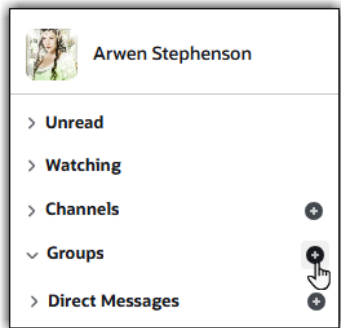
Working With Groups

bluChat groups are two or more users in a members-only conversation that other users can join only by invitation. Groups are similar to channels in that they can be named. Groups are different than channels in that you must be invited to join.

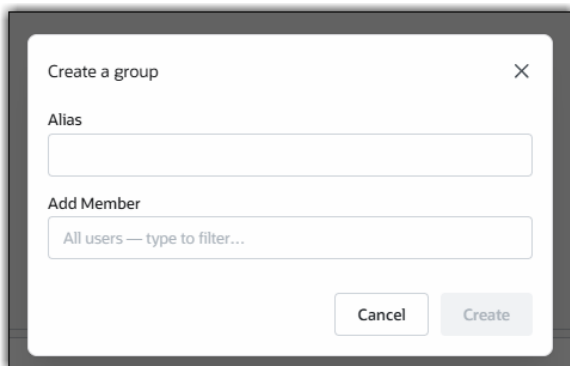
Creating a Group

To create a new group, follow these steps.

1. Go to the bluChat Messages page.
2. In the left sidebar, locate the **Groups** section.

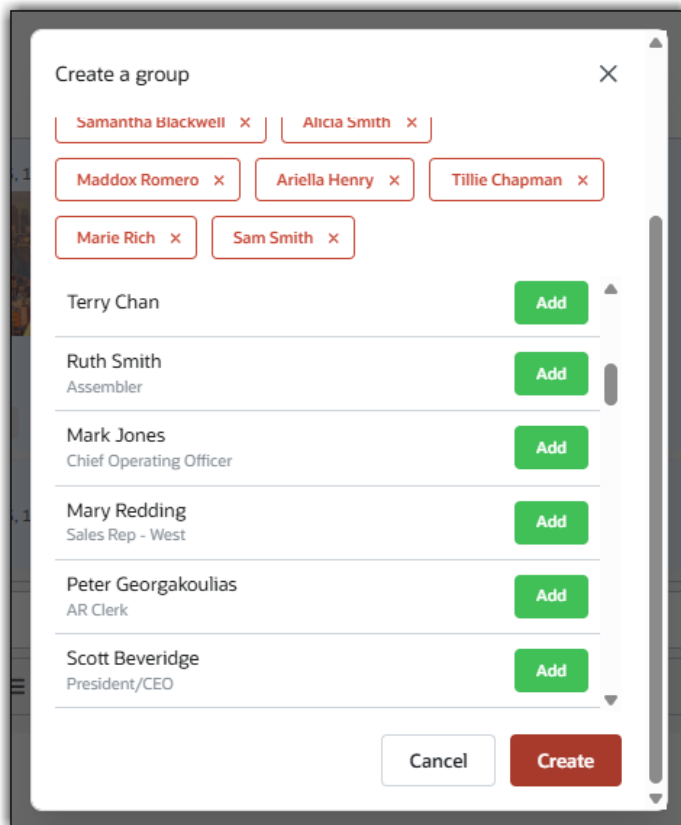


3. Click the **Add Groups** button. The Create a Group window opens.



4. In the Create a Group window, use the **Alias** text box to name your group.
5. Scroll through the user list or begin typing the name of the user you want to add. When you use the search bar, a list of suggested users appears and populates user name suggestions that are consistent with the characters you type.

6. Next to the user you want to add to the group, click the **Add** button. The user you added is selected and placed on a list underneath the search bar.
7. Continue searching for and adding any additional users you want to add to the group. Users you select are added to the list.
8. When you are ready to create the group with the selected members, click **Create**.



The group is immediately created and added to your list of **Groups** on the bluChat messages page. The group also appears in the **Groups** section for every user you added to the group.

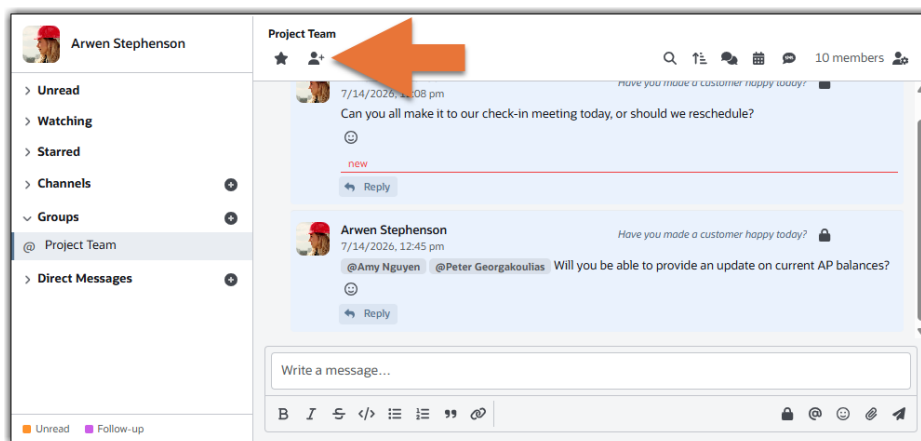
Adding Members to a Group

You can add members to a group by updating the group membership directly, or by simply mentioning a user in a group they do not already belong to.

Adding Users by Selecting Them

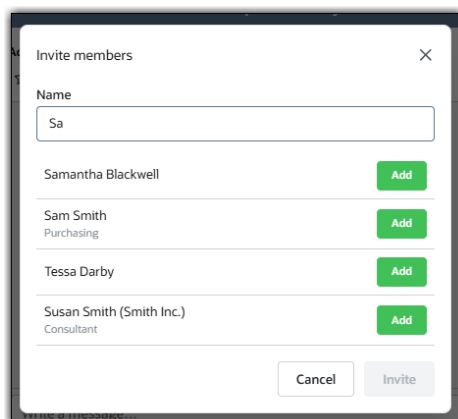
To add new members to a group by manually updating the group membership, follow these steps.

1. On the bluChat messages page, select the group you want to work with.
2. In the group header, click the **Invite Members** icon.

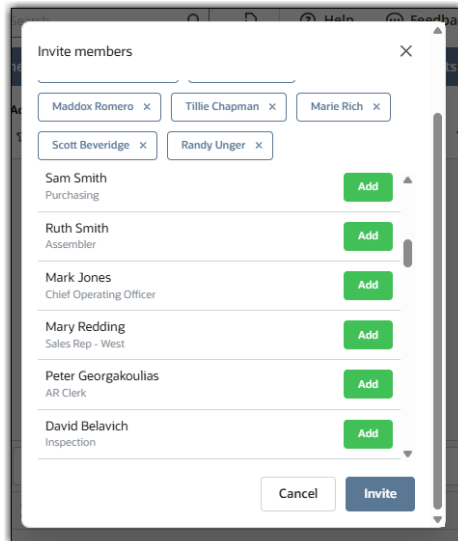


The Invite Members window opens.

3. On the Invite Members window, begin typing the name of the user you want to add. A list of suggested users appears and populates user name suggestions that are consistent with the characters you type.



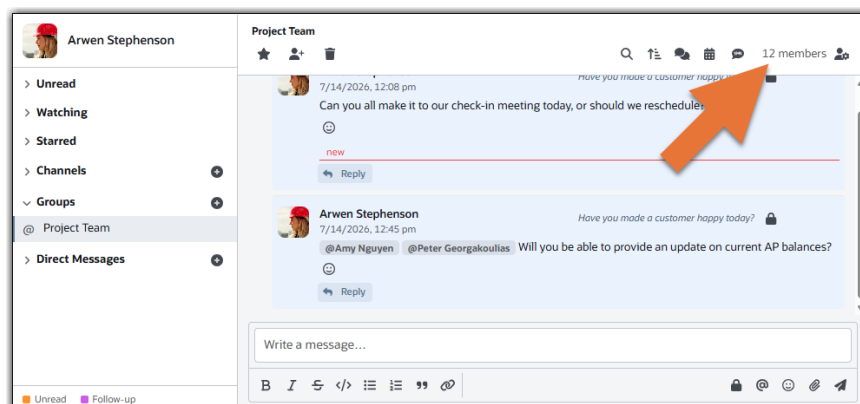
4. Next to the user you want to add to the group, click the **Add** button. The user you added is selected and placed on a list underneath the search bar.
5. Continue searching for and selecting any additional users you want to add to the group. The users you select are added to the list of invitees under the search bar.



6. Once you have selected all the users you want to add, when you are ready to add them to the group, click the **Invite** button.

The selected members are immediately added to the group.

- The group appears on each member's bluChat messages page under **Groups**.
- The membership count in the upper-right corner of the group is updated to reflect the new members.

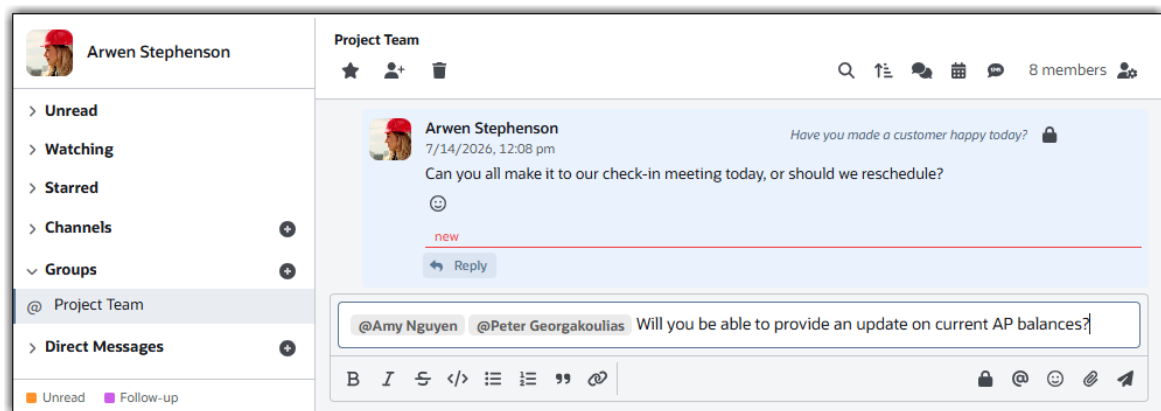


Adding Users by Mentioning Them

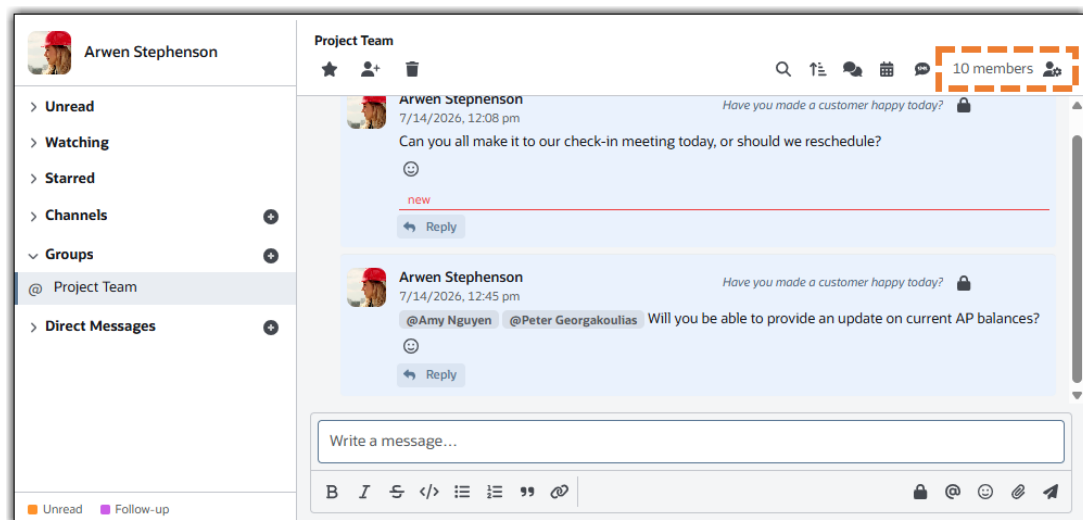
In addition to manually updating channel membership, an alternative way to add users to a group automatically is to mention them in a new message.

To add new members to a group by mentioning them, follow these steps.

1. On the bluChat messages page, select the group you want to work with.
2. In the group, draft your message. Use `@[user name]` to mention the user or users you want to add to the group.



3. Send your message. When the message is sent, the users you mentioned are automatically added to the group.
 - The group appears on each member's bluChat messages page under **Groups**.
 - The membership count in the upper-right corner of the group is updated to reflect the new members.

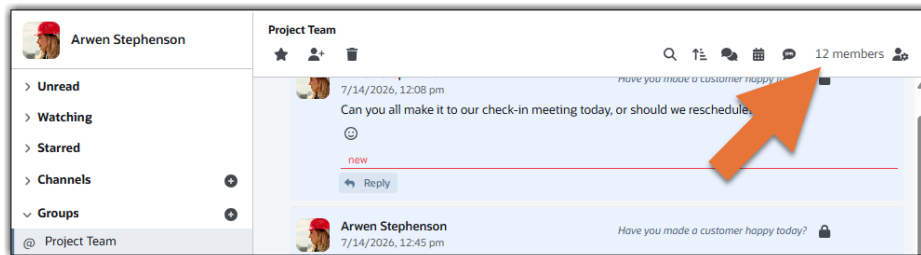


Removing Members from a Group

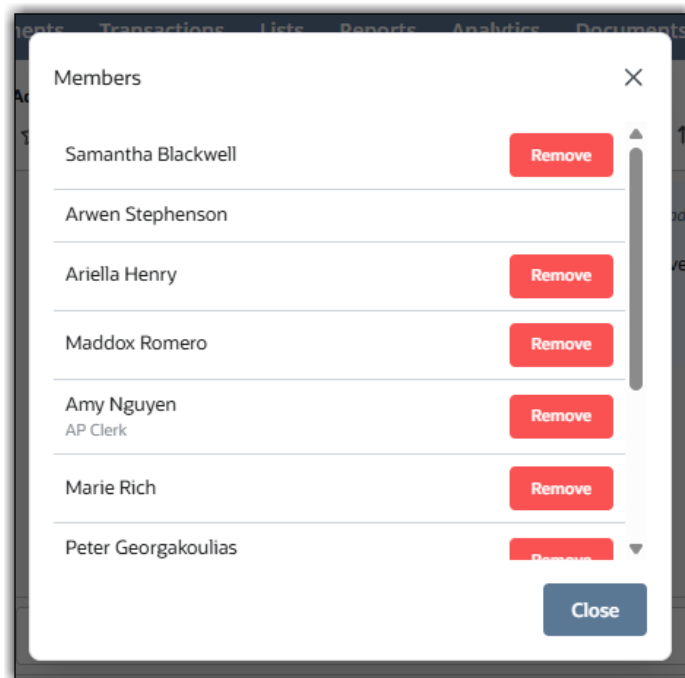
The person who created a group can remove members from the group. The group's creator cannot be removed.

To remove a member from a group, follow these steps.

1. Click the **Show Members** link in the group's header. The Members window appears.

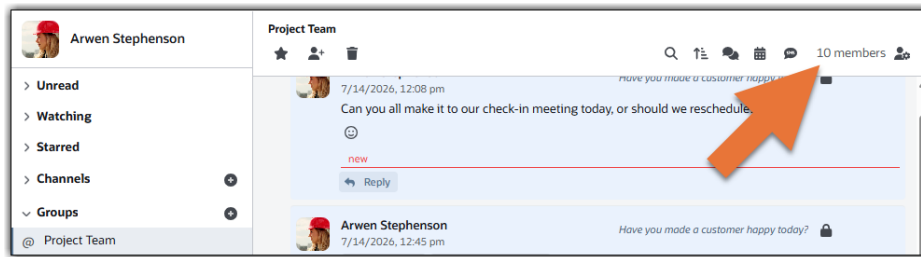


2. In the Members window, scroll through the list of members until you find the user you want to remove from the group.



3. Next to the name of the member you want to remove from the group, click **Remove**. The member is immediately removed from the group. The group is removed from the member's bluChat messages page under **Groups**.

4. When you are finished removing members, click **Close**. The membership count in the upper-right corner of the group is updated to reflect the removed members.



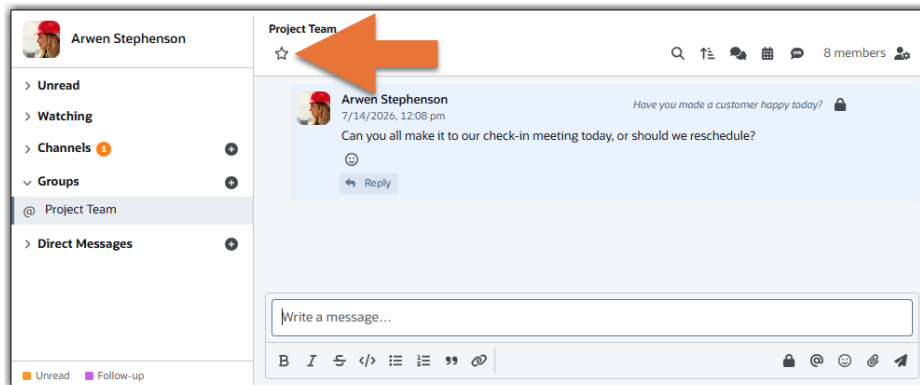
Starring Groups

When you star a group in bluChat, you mark it as a favorite so it's easier to find and get back to. Starred chats are grouped together in a dedicated **Starred** section in your sidebar, keeping your active conversations in a consistent, easy-to-reach spot.

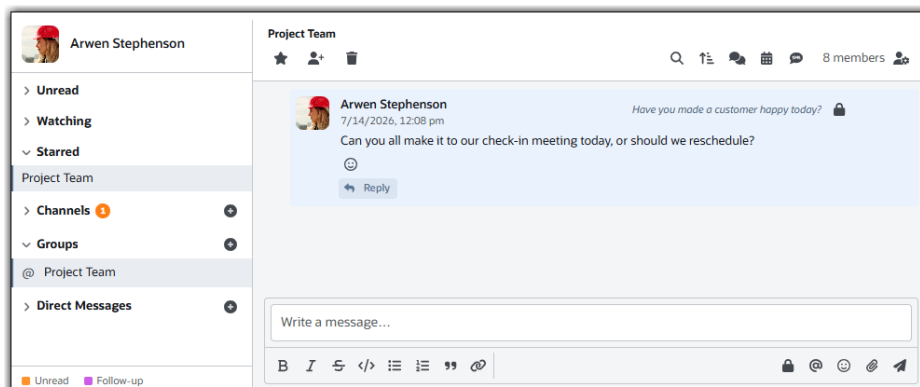
Starring is purely an organizational shortcut and doesn't change notification badges for the group. Starring is the best way to curate your sidebar around the handful of groups you use regularly day, so the noise of the less active groups doesn't get in your way.

To star a group, follow these steps:

1. Go to the bluChat messages page.
2. In the left sidebar, select the group.
3. At the top of the chat, click the **Star** icon.



The **Star** icon is highlighted, and the group appears in the **Starred** section on the bluChat messages page, where you can easily find and work with it.



Unstarring a Group

When you star a group, the group appears in the **Starred** section on the bluChat messages page, and the **Star** icon is highlighted at the top of the chat.

If you want to remove the group from your starred chats, click the **Star** icon next to the group name to clear it.

The group is immediately removed from the **Starred** section on the bluChat messages page.

Working With Direct Messages

bluChat direct messages are a one-to-one conversation between two users. Direct messages cannot be joined by other users.

Important: All bluChat messages, even direct messages, can be searched and audited, and therefore are not private.

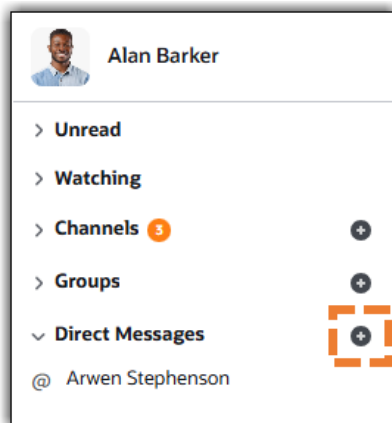
Creating a Direct Message

Direct messages are chats with only two members.

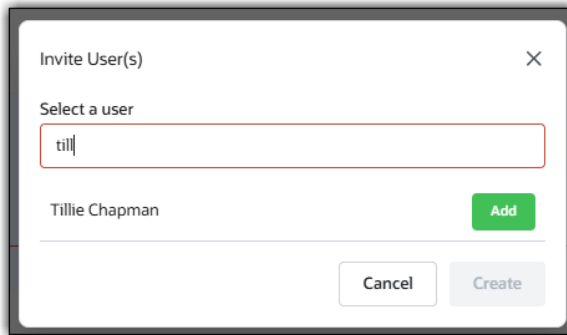
Note: When you create a direct message chat, it appears on the bluChat messages page for both you and the other member, even if no messages have been sent through the chat yet.

To create a new direct message chat, follow these steps.

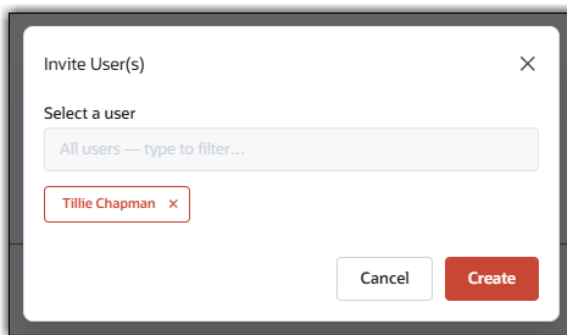
1. Go to the bluChat messages page.
2. In the left sidebar, locate the **Direct Messages** section.
3. Click the **Add Direct Messages** button. The Invite User(s) window opens.



- In the Invite User(s) window, begin typing the name of the user you want to start a conversation with. A list of suggested users appears and populates user name suggestions that are consistent with the characters you type.



- Next to the user, click the **Add** button. The user you added appears under the search bar. Because direct messages are between two bluChat users, you can only add one other user to the direct message chat.



- To create the direct message chat, click **Create**.

The chat is immediately created and appears on the bluChat messages page for both you and the other user. The chat appears under **Direct Messages**.

Proceed to chat with the other user.

