Collections/Internal Chat

What are Collections/Internal Chat?

Collections/Internal Chat enables certain users to work collaboratively on collections/internal chats of records e.g groups of invoices that need to be checked, candidates that are ready to complete the onboarding process or groups of potential new clients that need to be followed up on.

Accessed from the Desktop, the collections/internal chat view lists all the collections/internal chats that you have either created or been added to.

Required Settings

If your hub is enabled for static data download, the required data for collections/internal chat will be pulled from this. If not, these files can be sent manually or downloaded from the FTP. Please contact IQX Support if you require these.

1. General Settings - Layout 1910 - Set to Y
2. User - Layout Settings - Show Desktop Collections - Set to Y

Setting up Collections/Internal Chat

First, to turn on collections set general Setting group of layout number 1910 to Y.

the in Maintenance - Agency Set up - Collection Types set up the collection types.

- Name - Name of Collection eg Leads, Invoices
- Question Code - Required if you would like to link a questionnaire. This is not mandatory.
- Sort Order - Not required.

When using the Collections feature, it is possible to amend the terminology so it appears as “Internal Chat”. You can this by amending the Terminology Setting number 750 in General Settings.

Only users who have been given the user layout setting of 'Show Desktop Collections' will be able to access this feature. The right can be granted in bulk using the Bulk Add Role button.

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