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, we need to set up some Collection Types. This is done through Maintenance - Agency Set up - Collection Types. Click on add.

- 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 Settings 750, 760 & 770 in General Settings.