



Collections/Internal Chat

Collections/Internal Chat (the name can be determined by your agency) is accessible from the desktop if enabled by your agency. It is a means of bringing together a group of users so they can discuss an issue/work on a project. Users can 'chat' in a conversation style and add relevant documents.

Adding a new Collection/Internal Chat on Desktop

To do this, go to Desktop - Collections/Internal Chat. Click on new and the following box will appear:

A screenshot of a 'New Internal Chat' dialog box. The dialog has a blue title bar with the text 'New Internal Chat' and a close button (X). Inside the dialog, there are five fields: 'Name' (a text input field), 'Internal Chat Type' (a dropdown menu), 'Date From' (a date picker), 'Date To' (a date picker), and 'Notes' (a large text area). At the bottom of the dialog are two buttons: 'Ok' and 'Cancel'.

Required

- Name - Name you would like to give the collection/internal chat
- Internal Chat/Collection Types - Collection/Internal Chat type as created in Agency Set Up

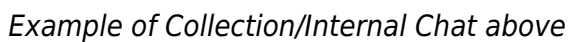
Not required

- Date From - Date Collection/Internal Chat starts (can be added after the creation)
- Date To - Date Collection/Internal Chat ends (can be added after the creation)
- Notes - If you have any notes required to be on this Collection/Internal Chat

View of Collections/Internal Chat on Desktop below:



Using Collections/Internal Chat



- You can only add users to the chat if they have the collections user layout setting activated
- You can drag and drop records to Collections/Internal Chats including candidate, contact, timesheets and invoices
- When a user gets a pop up reminder to advise they have been added to a Collection/Internal Chat or that there is a new chat message, there is a button within the pop up that takes you to the Collections/Internal Chat view on Desktop, see below:

A screenshot of the 'Appointment / Reminder' window in the iqx software. The window has a title bar with 'Appointment / Reminder' and a close button. Below the title bar are buttons for 'Copy', 'Delete', and 'Help'. The main area contains several fields: 'Popup Again' set to '5', 'At' with a dropdown, and an 'Internal Chat' button highlighted with a red box. Below these are 'Consultant' (VHS), 'Priority level' (5), and a checked 'Popup Notification' box. The 'Date / Time' is 'Fri 15/04/2022 14:16' and 'Recur every' is '0 days'. The 'Description' is 'You have been subscribed to Collection: BD Calls to Make'. The 'Duration' is set to 'Reminder (no duration)'. There are 'Links' for 'Company' and 'Person'. At the bottom, there are 'Add' and 'Remove' buttons for 'Other Staff' and a 'Notes' section with an 'Insert Text' button. The footer says 'Created 15/04/2022 14:16 by SHELLEY'.

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