



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 several fields: 'Name' with a text input field, 'Internal Chat Type' with a dropdown menu, 'Date From' with a date picker, 'Date To' with a date picker, and 'Notes' with 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' form in the iqx system. The form is titled 'Appointment / Reminder' and has a close button 'X'. It contains several sections: 'Copy', 'Delete', and 'Help' buttons at the top; a 'Popup Again' section with a dropdown set to '5' and an 'At' field; an 'Internal Chat' button highlighted with a red box; a 'Consultant' dropdown set to 'VHS' and a 'Priority level' dropdown set to '5'; a 'Popup Notification' checkbox checked and a 'Beforehand' dropdown set to '0' minutes; a 'Date / Time' field set to 'Fri 15/04/2022 14:16' and a 'Recur every' dropdown set to '0' days; a 'Description' field with the text 'You have been subscribed to Collection: BD Calls to Make'; a 'Duration' section with a radio button selected for 'Reminder (no duration)' and options for 'Minutes', 'Hours', 'Days', and 'Weeks'; a 'Links' section with 'Unlink', 'Company', and 'Person' buttons and input fields; and an 'Other Staff' section with 'Add' and 'Remove' buttons and a list of staff members. At the bottom, it says 'Created 15/04/2022 14:16 by SHELLEY'.

From:

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Last update: **2022/06/28 16:04**

