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**INSTANT MESSAGE**

Instant Message enables fast text communications between EXACT users on a network.

*For a quick reference see [The Instant Message main screen](#) on page 8.*

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Overview of Instant Message

This overview considers Instant Message in terms of its purpose, benefits, features and requirements.

Purpose

Instant Message provides a simple instant communication capability between EXACT users on a network. It has been updated with improved performance and functionality from EXACT version 11.3.

Benefits

Benefits include:

- Communications are fast.
- The software is intuitive to use and easy to configure.
- It doesn’t require firewall rules (these were required by earlier versions of Instant Message).
- It doesn’t require module registration.

Features

Simple functionality

The messaging window is accessible, opens quickly, and is easy to use.

Quick Notes

Frequently-used notes can be saved as Quick Notes and inserted into messages with a few clicks.

Minimise instant messages by default per user

From v11.6 it is possible to configure EXACT (per user) to automatically minimise incoming instant messages, and indicate their arrival with only an audio beep. This doesn’t apply to panic button messages.

If you try to close EXACT you will be prompted to deal with any minimised instant messages.

Panic option

A panic message can be pre-configured or created on-the-fly and quickly sent system-wide.
Customise the audio notification

Customise the audio option from Configure > User Settings...

Possible to send messages to the same computer

From v11.3 it is possible to send messages to another logged in user on the same computer (this was not possible in earlier versions).

Continuity of service even for brief network interruptions

EXACT enables messages to be sent even when there are brief interruptions in the network. If a message is not delivered for some reason (such as network delay), it will remain in a pending state for 20 seconds, and will be sent within this 20 seconds if the connectivity problem is resolved.

EXACT delivers messages to every computer where a user is logged on

Normally a user is only logged on to one computer, and the user’s own name does not display in their own instant message list.

However, a user who has logged into two or more instances of EXACT will be able to see their own name in the Instant Message user list. In this case, when a new instant message is sent to this name, that message will be sent to all EXACT workstations that have that user name logged on, because EXACT cannot know at which computer the user is physically located.

Requirements

Requirements:

Instant Message requires the following in order to function:

- EXACT v11.3 or later
- Another user on the network. It requires more than one user logged in within a network, whether on separate computers or on a single computer. If you are the only logged in user you cannot open the Instant Message software; you will simply see an error message:

 Limitations:

EXACT does not inform the sender about any delivery failure.

The Instant Messaging does not guarantee delivery of the message, but non-delivery would only happen if the destination user had exited or locked their EXACT software while the sender was constructing the message, or possibly if the destination user/computer is unable to communicate with the database server.
Using Instant Message

This section includes descriptions and procedures for using Instant Message.
For a quick reference see *The Instant Message main screen* (on page 8).

Opening Instant Message

*To open Instant Message*

Either

- Select File > Instant Message...

- OR -

- If you have added a shortcut to the workspace bar, select the Instant Message icon:

The *Instant Message main screen* (see "*The Instant Message main screen*" on page 8) displays.

The Instant Message main screen

All Instant Message operating functions can be performed from this main screen:
Sending an Instant Message to selected EXACT users

To send an instant message to selected users

1. Open Instant Message.
2. Create a text message by either
   - Typing in the Message box (note the character limit of 1000 characters, and the remaining-character indicator at bottom right)
   - OR -
   - Selecting a Quick Note and clicking the transfer button << , to display that Quick Note text in the Message box.
3. In the To list, click a user and optionally use CTRL-click to select further users.
4. Click the Send button.

Sending an Instant Message to ALL EXACT users

To send an instant message to ALL users

1. Open Instant Message.
2. Create a text message by either
   - Typing in the Message box (note the character limit of 1000 characters, and the remaining-character indicator at bottom right)
   - OR -
   - Selecting a Quick Note and clicking the transfer button << , to display that Quick Note text in the Message box.
3. Click the All button to select all users in the To list.
4. Click the Send button.
Filtering the Quick Note list by Type

To filter the Quick Note list by type

When viewing Quick Notes you have the option to filter the list by Type:

![Quick Note list filter by type](image)

SEE ALSO: Viewing ALL Quick Notes in the list (on page 10)

Where do these Types originate?

When users on the network create or edit a message, they have the option to assign a Type.

(See Creating, Editing, Deleting Quick Note Types (on page 16))

Viewing ALL Quick Notes in the list

To view ALL Quick Notes in the Quick Note list

1. In the Type field at the bottom of the Quick Note list, delete the displayed Type so that there is nothing displayed:

2. Click somewhere in the Quick Note list.
3. ALL Types will immediately display.
Creating and sending a Panic message

The Panic message is a system-wide broadcast.

Your practice can either

- Pre-configure a Panic message that all users understand,
  - and / or -
- Users can quickly configure a Panic message and send it at the time it is needed.

To send a pre-configured Panic message

Simply click the Panic button.

To quickly create and send a Panic message

1. Click the Configure button, type the message and click OK:

![Configure Panic message](image)

2. Click the Panic button.

Receiving instant messages

The way you receive instant messages depends on whether these messages are un-minimised (the EXACT default), or minimised (an optional per user setting).

To close EXACT when there are messages open

If you attempt to close EXACT with messages open you will see an error message:

![Error message](image)
To receive un-minimised instant messages

(This is default EXACT behaviour)

When the message comes in you will hear a beep (configurable), and the message will overlay other screens, and you have to Reply or Close to remove it from the screen:

To receive minimised instant messages

(This happens only if EXACT has been configured for minimised messages)

When a message arrives you will hear an audible beep.

Nothing else changes on your screen.

Locate the message where it is minimised to your taskbar:
Troubleshooting Instant Message

Message: No other users are logged in to EXACT

Instant Message requires that more than one user be logged in within a network, or on a single computer. You cannot open the Instant Message software if you are the only logged in user; you will simply see the above error message.

I cannot see a Quick Note in the Quick Note list

Check the Filter at the bottom of the list - perhaps you need to change the filter to see the note (see Filtering the Quick Note list by Type (on page 10)).

I sent a message but the user says that he did not receive it, and I received no notification of this

EXACT does not inform the sender about any delivery failure. However, such cases are rare. The Instant Messaging does not guarantee delivery of the message, but non-delivery would only happen if the destination user had exited or locked their EXACT software while the sender was constructing the message, or possibly if the destination user's computer is unable to communicate with the database server.
Configuring Instant Message
This section includes procedures to set up / configure / customise Instant Message.

Adding Instant Message shortcut to Workspace Bar
If you use Instant Message frequently, it helps to add the shortcut to the Workspace Bar:

To add the Instant Message Shortcut to the Workspace Bar
1. Right-click the Workspace Bar and select Customise... to open the Customise Workspace window:

2. In the left pane, click to select the Instant Message shortcut.
3. Click the Transfer >> button.
4. Check that the Instant Message shortcut displays in the right pane, and select it.
5. Use the Up and Down arrows to move your selected Instant Message shortcut up or down in the list. This corresponds with left and right in the Workspace Bar.
6. Click OK.
Creating, Editing, Deleting Quick Notes

For frequently-used text messages users can create Quick Notes, then use these to populate the Message box with a few quick clicks.

To create a Quick Note
1. Open the Add Quick Note screen by either
   o Clicking the +1 button
   - OR -
   o Pressing CTRL-A

2. Type a Description (a name to appear in the Quick Note list)
3. Optionally specify a Type. This enables users to filter the Quick Note List by this Type to quickly locate this Quick Note.
4. Type the Quick Note text, with a maximum of 1000 characters.
5. Click OK.

To edit a Quick Note
Either double-click the Note, or select a Note and then click the Edit button:
To delete a Quick Note

Select the Quick Note in the list, then click the Delete (bin) button.

Creating, Editing, Deleting Quick Note TYPES

SEE ALSO: Filtering the Quick Note list by Type (on page 10)

To add a new Quick Note Type

From the Instant Message screen,

1. At bottom right, click in the Types filter box to display the Type selectors.

2. Click the View Types button to display the View Note Types window.

3. In the View Note Types window, click the +1 button to display the Add Note Type window.

4. Type a name for the Quick Note, as you want it to appear in the Types list.

5. Click OK.

6. Click OK.
Configuring the audio alert per User

To configure a user’s audio alert

(This setting is per logged in user)

1. Select Configure > User settings...
2. Select an option under Instant message audio alert:

   ![Audio Alert Configuration](image)

   ( Optionally click the Play button to test it)

Configuring default message minimisation

By default EXACT displays all incoming instant messages overlaid on other windows.

From v11.6 each user can optionally change this behaviour so that incoming messages (except for panic button messages) are minimised by default.

User will still be notified of message arrival by means of an audio beep (customisable).

If users attempt to close EXACT they’ll be prompted to deal with minimised messages.

To configure default message minimisation

1. Go to Configure > User settings
2. Locate the Instant Message area at bottom right and check (tick) Minimise incoming messages:

   ![Message Minimisation Configuration](image)

3. Click the Save button:
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