

Messenger

Filters & Archiving

Your **Messenger** screen in TargetCRM/Notify360 contains a variety of filtering tools that allow you to narrow your display to only relevant conversations and messages. Many of these filtering tools are **Persistent**, meaning that your TargetCRM/Notify360 system will remember how you configured them, even after leaving and returning to the program.

Filters

1. Search – At the top left corner of the **Messenger** screen is a magnifying glass icon that will open a *Search* bar, that will allow you to look up conversations by customer name, phone number, or keywords found in message history. The *Search* field accepts partial entries, and the displayed records will update as you type.
2. Radio Buttons – There are two radio buttons that can adjust your view in **Messenger**:
 - a. All – This will display all conversations, regardless of whether the messages are unread.
 - b. Unread – This will display only conversations that include messages from customers that have not been viewed yet.
 - c. Archived – This will display closed conversations that have been saved to archives.
3. *Filters* – The *Filters* drop-down menu contains two checkboxes that will modify your view based on conversation assignment:
 - a. *My Conversations* – Checking this box means that messages that have been assigned to your User ID will be included in the display.
 - b. *Unassigned* – Checking this box means that messages that have not been assigned to any user ID will be included in the display

Archiving

When you finish a conversation with a customer, Archive it to take it off the list of active conversations. The conversation is retained for review, but it is considered closed.

1. When a conversation with a customer is complete, select the Archive button at the top right corner of their conversation window.
2. Give the conversation a descriptive *Title*.
3. The conversation is moved to the Archived view in **Messenger**, and can also be viewed in the Summary tab of the Customer Details screen.

If you find yourself wanting to Merge a current conversation with an Archived conversation, use the Merge button to combine them.