

# How to: Save Messenger Chats and Attachments to the Inbox



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## Why save Messenger chats to the Updox Inbox

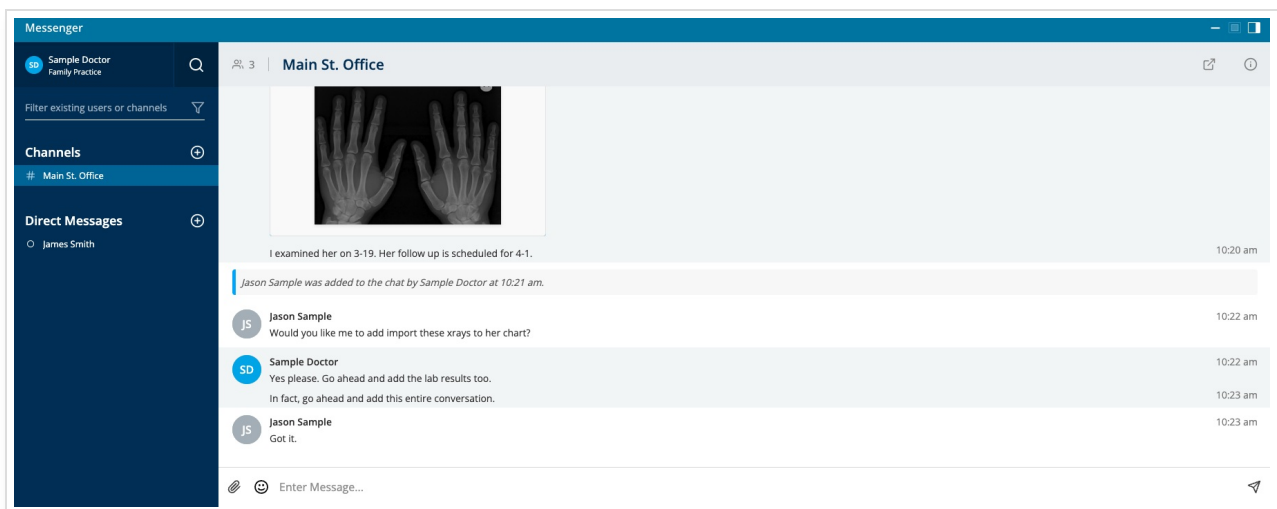
Updox Messenger allows your team to stay in sync from anywhere - on any device - using recognizable chat tools in a HIPAA-compliant environment.

But what if something is shared in a Messenger chat that needs to be saved to the Updox Inbox? Chats, documents, and images may contain relevant patient information that should be saved to the patient's chart.

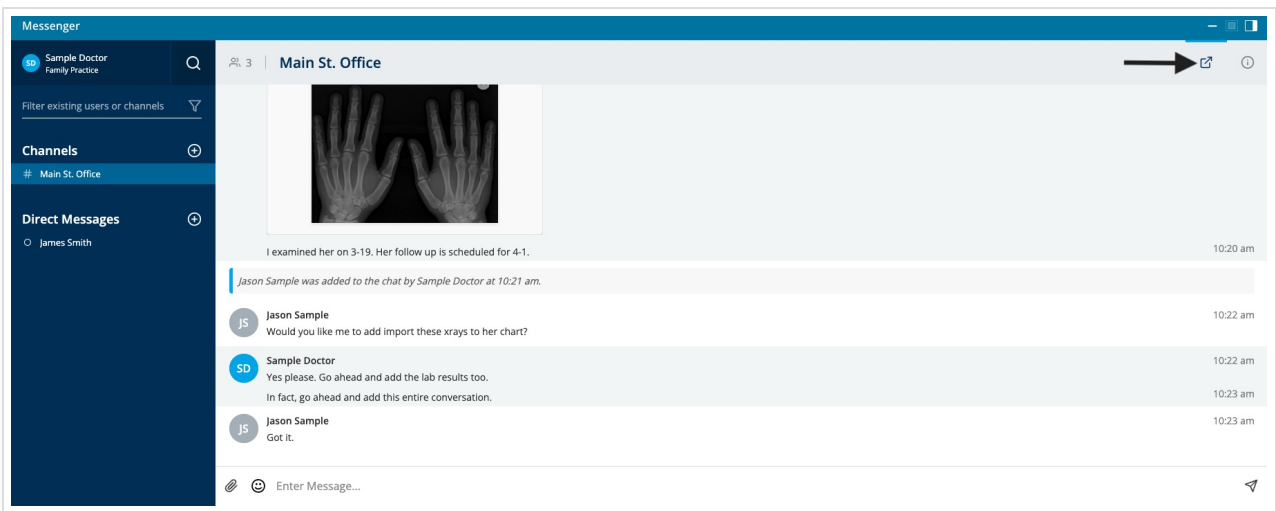
This job aid shows how to safely move documents and images to the Updox Inbox for faxing, texting, or importing to a patient's chart.

## How do I save chats and documents to the Updox Inbox?

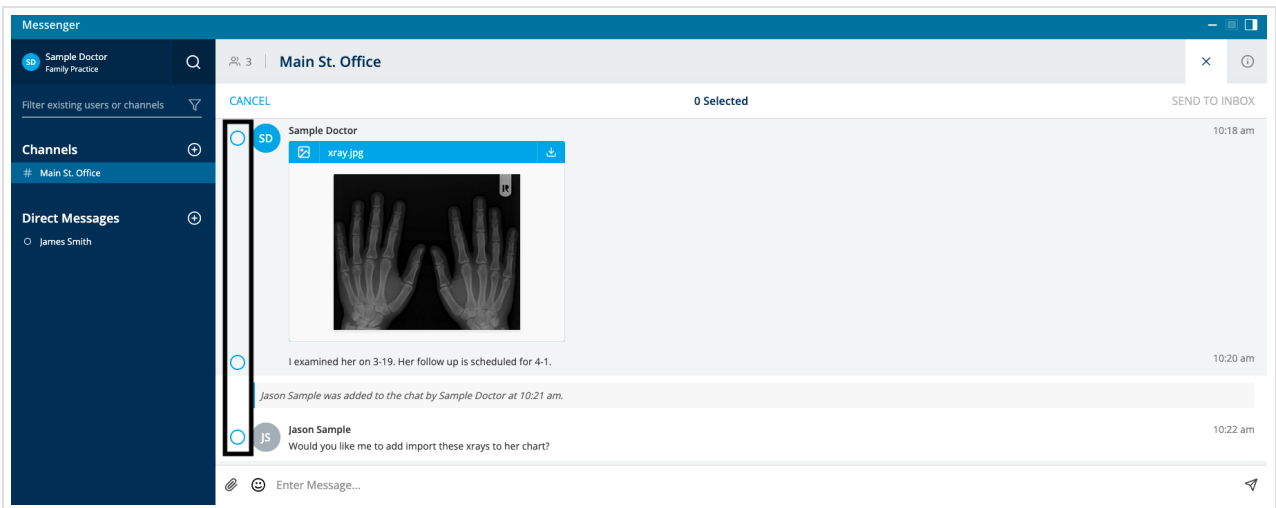
1. Open Messenger and select a channel or chat with data that you would like to send to the Inbox.



2. The **Send to Inbox** icon appears in Messenger on the top right, next to the Chat info icon.



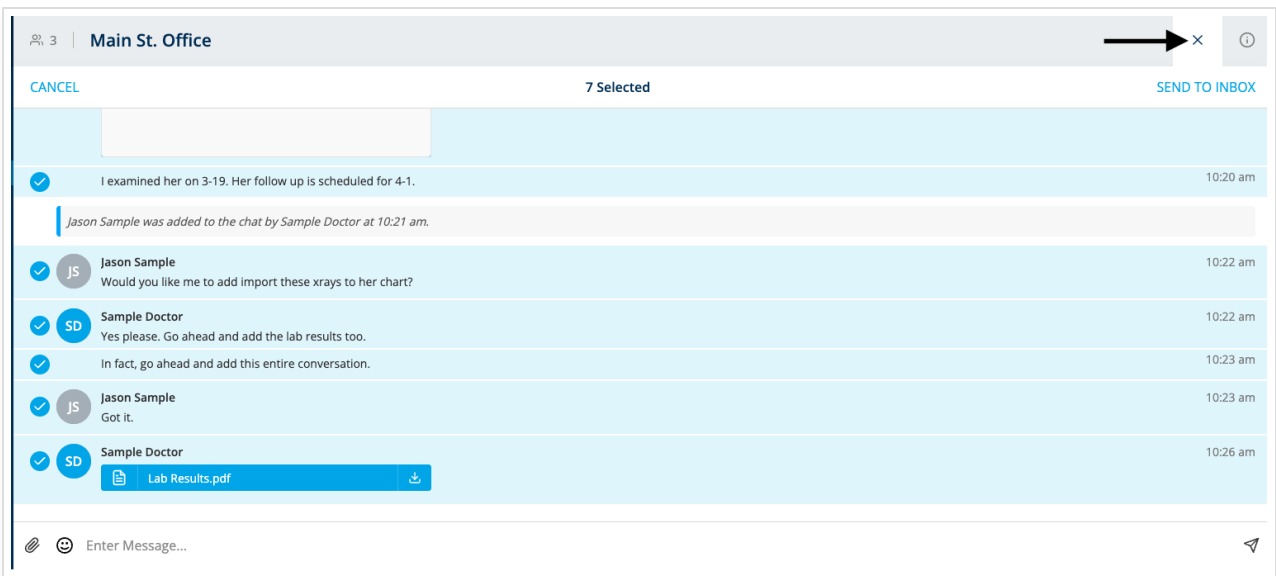
3. After, selecting the Send To Inbox icon will reveal round selection icons next to every message and item in the chat.



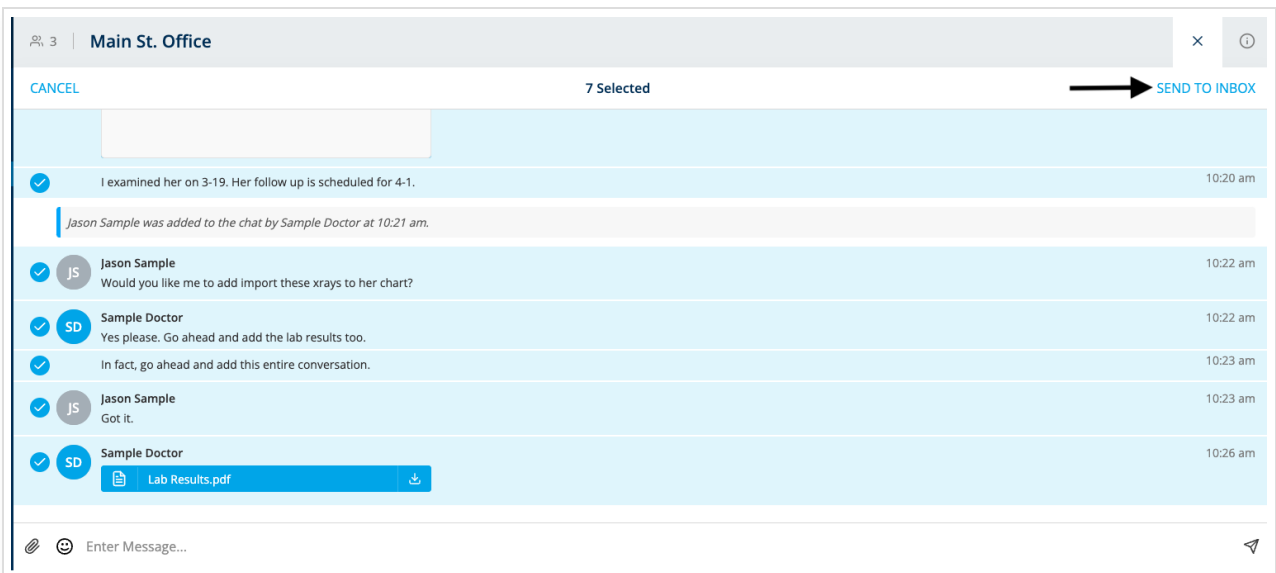
4. Click on the messages, files, and images that you would like to send to the Inbox.

**Tip:** It is important to note that chat messages and items must be selected individually. This allows you to omit any items or messages that are irrelevant or unneeded.

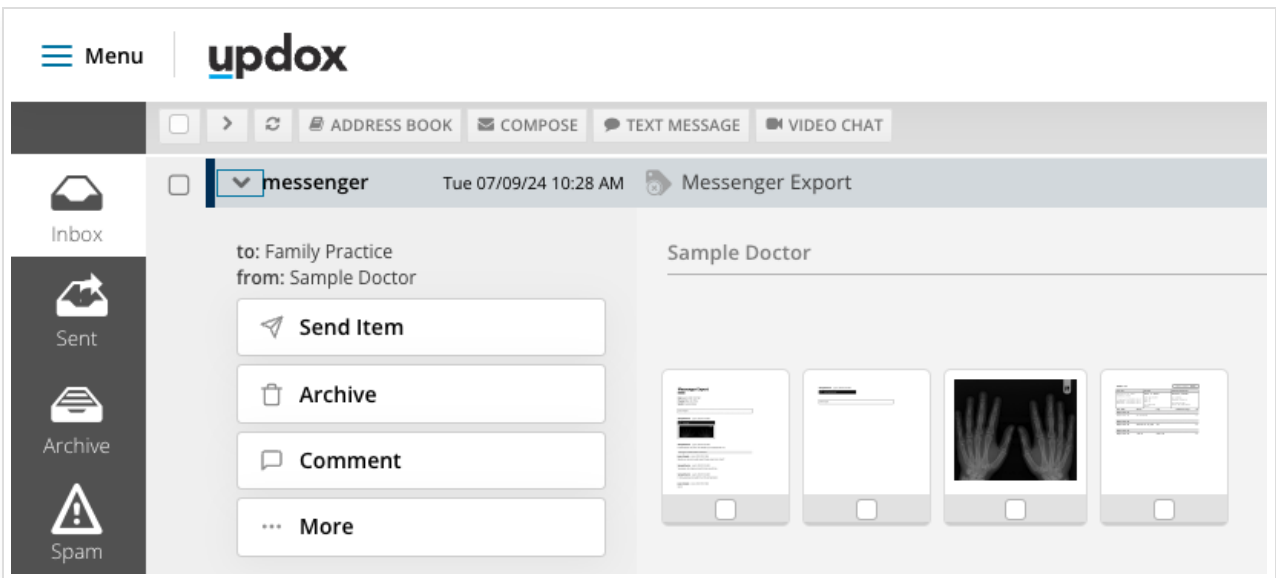
5. Clicking the "X" button will remove the round selection icons and you will not be able to send the items to the Inbox.



6. Once your messages and items are selected, click the **Send To Inbox** button.

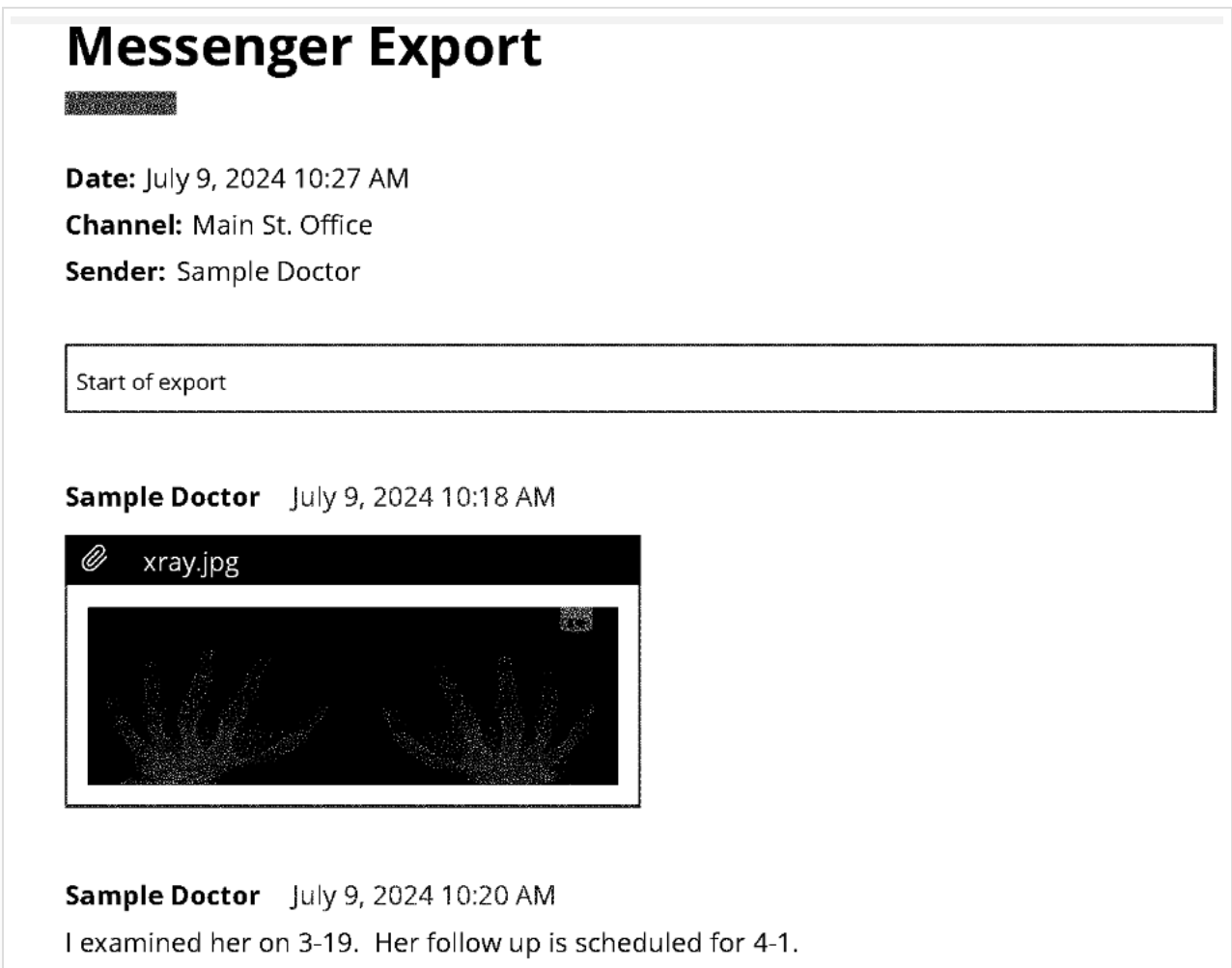


7. Items imported from Messenger will appear in the Inbox labeled **Messenger**. All items arriving from Messenger will be initially titled **Messenger Export**. Double-clicking the item title will allow you to rename it. Expanding the item will reveal the pages imported to the Inbox.



8. Every import from Messenger will be formatted with the time and date of the import, the Channel from which the item originated, and the name of the user performing the import.

The first pages of the import will contain the messages and items as they appear in the chat. Images will be represented with thumbnails. PDFs will display the title of item.



9. Full PDFs and images will be appended to the import after the chat transcript.

These items will be imported full size, with one page for each image. This allows for easy manipulation of individual pages and images.

Once the import arrives in your Inbox, you can treat it as you would any other Updox Inbox item, faxing it, texting it, or importing it to a patient's chart.



## Frequently Asked Questions

### **Can I send chats, documents and images to the Inbox more than once?**

Yes, any item in Messenger can be sent to the Inbox as often as needed.

### **Is there a limit to how many items can be sent at once?**

There is no hard limit, but sending more items takes longer. You might consider breaking long threads up into smaller imports.

### **Who has permission to move chats, documents, and images to the Inbox?**

Any Messenger user can move chats, documents, and images to the Inbox.

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