This page is a work in progress - none of the features listed here are available yet, all features listed are subject to change and the information may be incomplete.

Early Access Disclaimer
This tool is currently in **Early Access**. While it has access to live data, always verify critical dates and financial figures against the data in IQX.

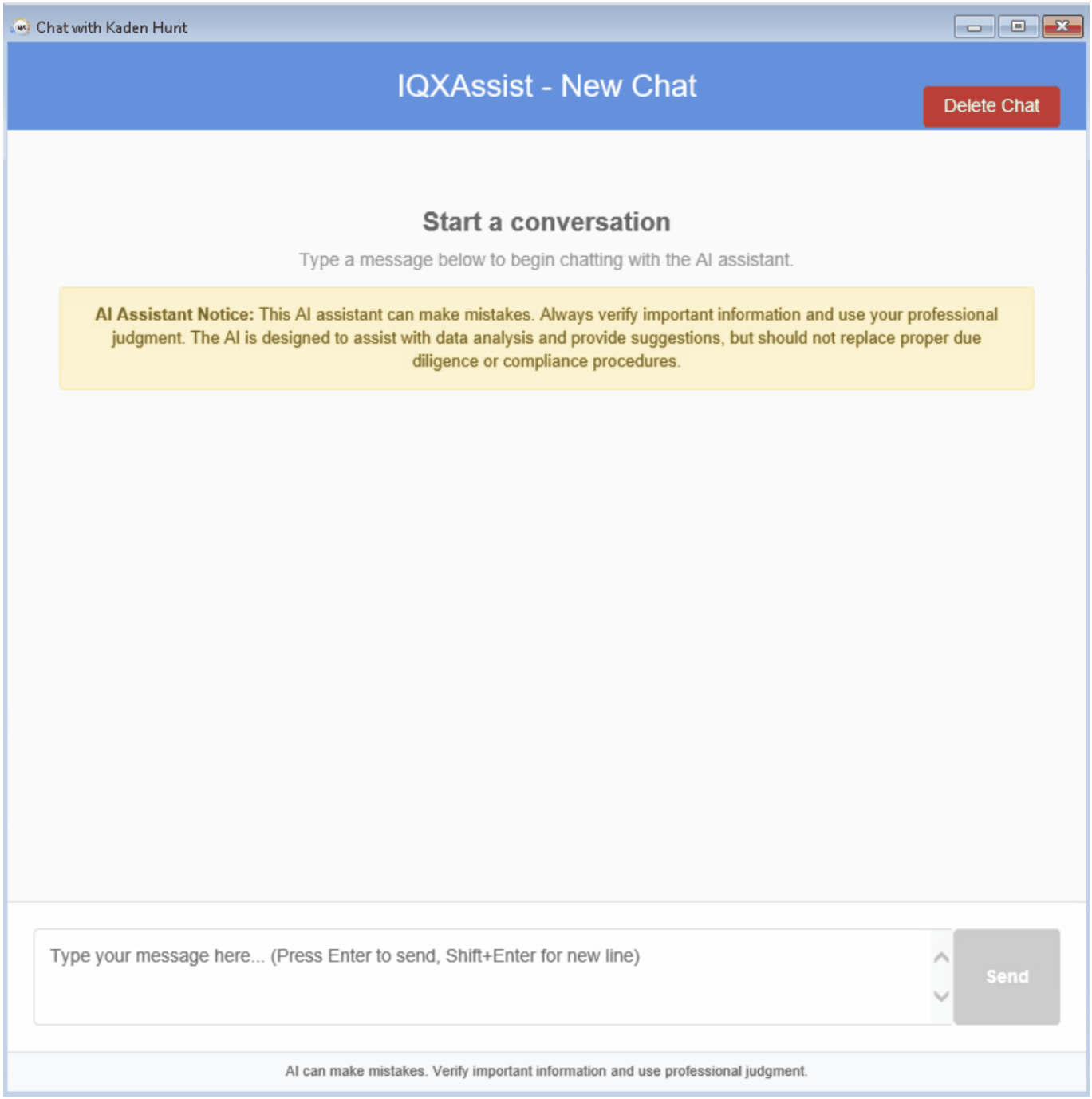
IQXAssist (Early Access)

IQXAssist is a powerful new AI companion integrated directly into your recruitment workflow. Unlike standard chatbots, IQXAssist can securely access live candidate records, process documents, and help you draft communications in seconds.

Key Capabilities

AI Chat Interface

The Chat interface is the central hub of IQXAssist. Unlike a standard “question and answer” bot, this chat is **context-aware**, meaning it knows which candidate or contact record you are currently viewing and can pull live data specific to them.



Core Capabilities

The chat operates in two distinct modes depending on your request:

- **Standard Conversational Mode:** Uses the LLM (Large Language Model) to answer general questions, draft text, or summarize information already provided in the chat.
- **Agent Mode (Live Data):** When you ask for specific records (e.g., “Show me timesheets”), the AI switches to “Agent” mode. It utilizes secure tools to fetch real-time data from the IQX database before answering.

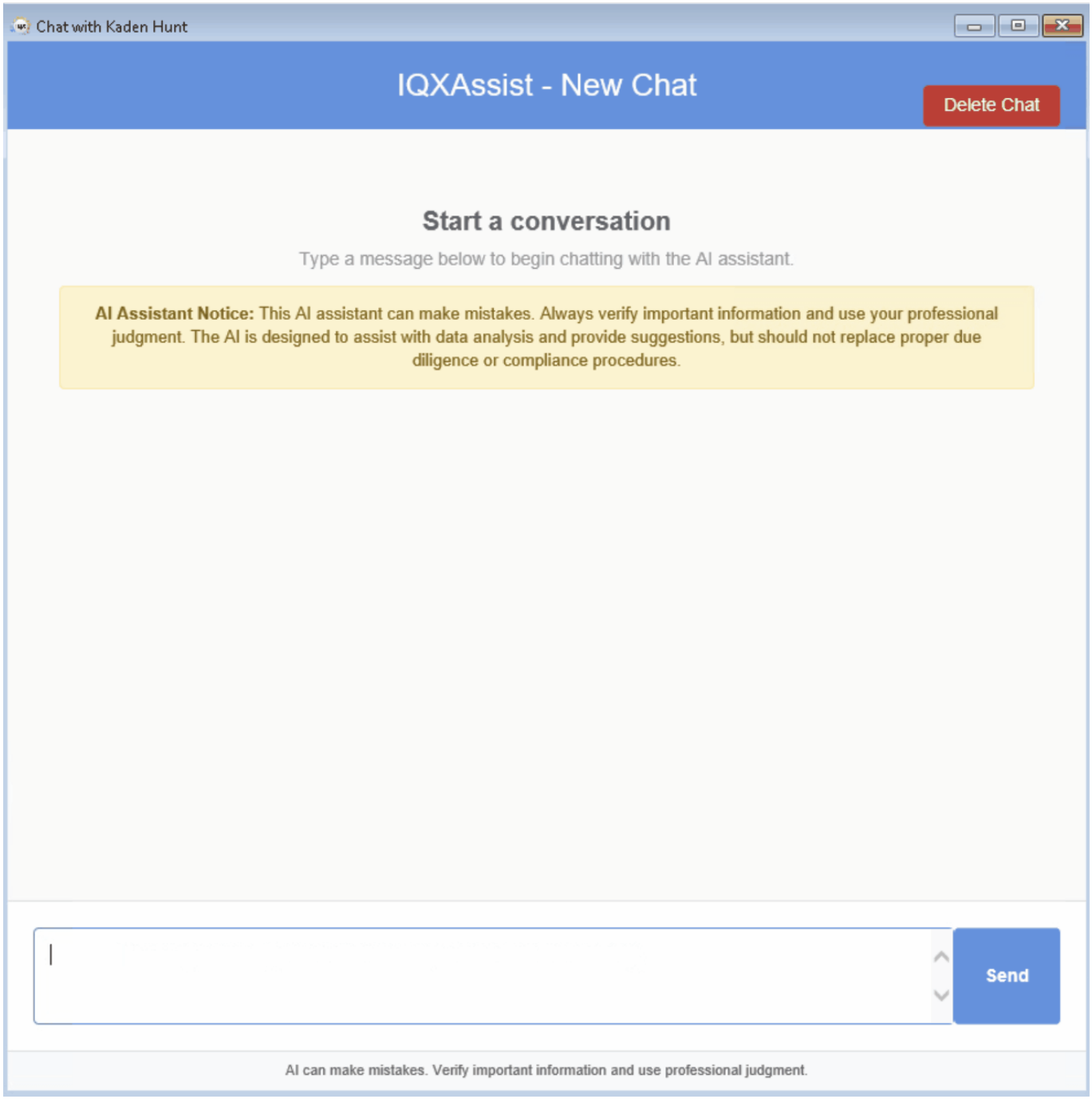
Live Data Access (The "Tools")

IQXAssist has strictly defined “Tools” that allow it to read specific parts of a record. It cannot write to the database, only read.

Data Type	What it can see	Best way to ask
Timesheets	Pay status, Hours, Rates, Processing dates	“Show timesheets from Jan 1st to Feb 1st”
Shifts	Past/Future bookings, Locations, Roles	“List all shifts booked for next week”
Availability	Holidays, Unavailability blocks	“Is this candidate available in March?”
Compliance	License details, Medicals, Right to Work	“Check if the Driving License is valid”
Notes	Contact history, Audit logs, User notes	“Summarize the last 3 months of notes”



The “Date Range” Rule To prevent overloading the system, the AI is trained to look for specific timeframes. If you ask for “Timesheets” without a date, it may default to the last 30 days or ask you to clarify. **Always try to specify: “Last Month”, “Next Week”, or “Since Jan 2024”.**



Content Generation & Formatting

One of the most powerful features is drafting communications. The AI has been trained on specific output formats to make copying and pasting easier.

Emails

If you ask the AI to “Write an email…”, it will format the output with a subject line and body text, ready to copy into Outlook or the IQX Mailer.

> **User:** “Write an email to this candidate confirming their shift on Tuesday at 9am.”
> **AI:** Generates a professional email with the subject “Shift Confirmation - Tuesday”.

Text Messages (SMS)

If you ask for a “Text message” or “SMS”, it keeps the response concise and casual, suitable for mobile delivery.

Security & Privacy

We have built IQXAssist with a “Privacy First” architecture.

- **Encryption at Rest:** All chat logs stored in the database are **encrypted**. Even database administrators cannot read the raw message history.
- **Context Isolation:** The AI session is tied to the specific record you are viewing. If you navigate to a different candidate, a new chat session begins to prevent data cross-contamination.

Smart Features

- **Auto-Titling:** The system automatically generates a concise title for your chat session based on the first few interactions, making it easy to find later in your history.
- **Streaming Responses:** Answers appear in real-time as the AI “thinks,” rather than waiting for the full response to load.

Document Processing

- **CV Reformatting:** Upload a CV (PDF or Word) and have the AI extract the data, redact personal contact info, and reformat it into a standardized, branded PDF CV. (For generating CV Templates see here: CV Template Builder)
- **ID Scanning:** Upload an image of a passport or driving license. 1) The AI will identify the photo, crop it perfectly, and allow you to save it directly to the record. 2) The AI can extract information from the ID and use it for registration.
- **Audio Transcription:** Upload voice notes or interview recordings to receive an instant text transcript.

Privacy & Security

- **Redaction:** When generating CVs, personal contact details (phone, email, address) are automatically redacted to protect candidate privacy.
- **Secure Context:** The AI operates within the context of the specific record you are viewing. It does not “train” on your data.

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Last update: **2026/02/05 11:00**