New Features - Release 2.3.4

Users

New Ability to Archive

Documents can now be archived in all document views. Once archived the file text will turn red. These files will not be available when attaching documents to emails.

When viewing a range of documents it is possible to filter them by All, Archived or Live documents. The default is All.

To access this feature from any view – Documents – Select a file – Use the Archive button



Alternative Form Background Colour

This feature allows the Company or Person form colour to be changed according to the record state. This feature requires System Administrator setup.



Alternative Font Colour on a Selector

This feature allows the Company or Person font colour to be changed according to the record state. This feature requires System Administrator setup.



Search Hints

Some users are unaware of the different search sections on the search screen. Therefore, the hints function has been set on. The text can be temporarily hidden by clicking Hints button.

Permanently hiding the Hints requires System Administrator configuration for each user.

To access this feature – People - Search

Increased information in the About Box

Information in the about box has been improved to display the first three digit Version numbers which changes when New Features are added and Build numbers which change when fixes and new builds are incorporated into the program.

Access this feature - Help – About

Mailmerge – Unsubscribing to Marketing

As part of the mailmerge process it is now possible to unsubscribe to Marketing on Person and Company Contacts.

To access this feature from a candidate – People – search and select a person – Get in touch (side bar) - Click the Un-Subscribe to Marketing button.

To access this feature from a Company Contact – Company – search and select a person or company – Click the Un-Subscribe to Marketing box.

Accessing Client Email addresses in Timesheet Image Link

When emailing a Timesheet Image, Client Email addresses can be searched or typed into the email box.

To access this feature – Accounts – Timesheet Image Link – Letter Icon – enter or search company email addresses in the To box.

Converting MS-Office document files into Current CV

MS Office document files ending in .doc and .docx, or of type MSOffice, can now be added and converted into the Current CV within a Person record.

Access this feature by People – Select a person – Documents – Select or Add an MS-Office Document – Click on the Make Current CV button

Stretchy Columns

In TempDesk, the columns are now stretchable.

To access the feature – Temp Desk or Vacancy etc. – Find the gap between columns – Hold mouse button down and stretch!

Editing Notes in Favourites Popup

In the Favourites popup, (the place for making personal lists of contacts/clients), it is possible to Edit Notes and Delete items from within this popup.

To access this feature – Favourites – Edit Notes or Delete

Colour Legend included in Contact Events

A Colour Legend to explain the use of font colours has been added to Contact Event Selector, Person and Company Contact Events.

To access this feature – Contact Events Selector (not Make Contact Event) – Click '?' OR People or Company – Select Company or Person – Click '?'

Blocking E-Timesheets

This feature offers the option to block creation of E-Timesheets by vacancy where the client does not want timesheets filled in online.

To access this feature – Vacancies – Search and Select a vacancy - Miscellaneous – Scroll down – Block E-Timesheets

This feature requires setting up by a System Administrator.

Accounts

Sorting by Charge Amount and Contract

Invoice Temporary Timesheets can now be sorted by Charge Amount and Contract Ref to allow all credit notes to be seen together.

Access to this feature – Accounts – Invoice Temp Timesheets

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