New Withholds

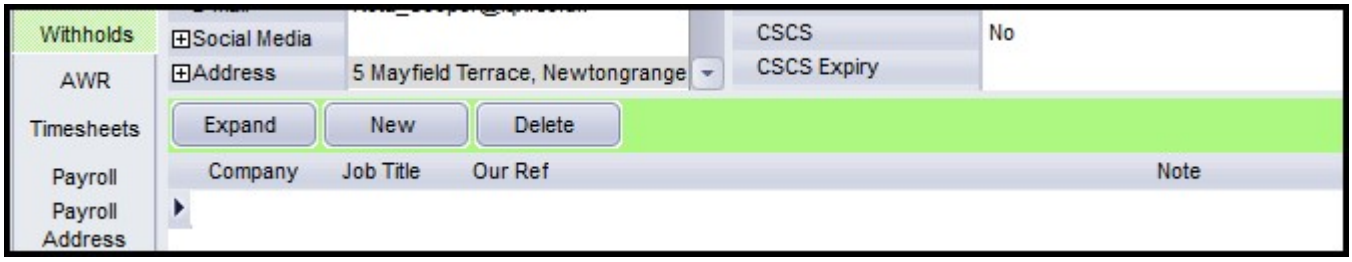
Release 2.17.4 onwards

Withholding has been updated to draw together all information on Person/Company/Vacancy withholding into a new view on each form Withholds. The following information is presented in a series of user stories

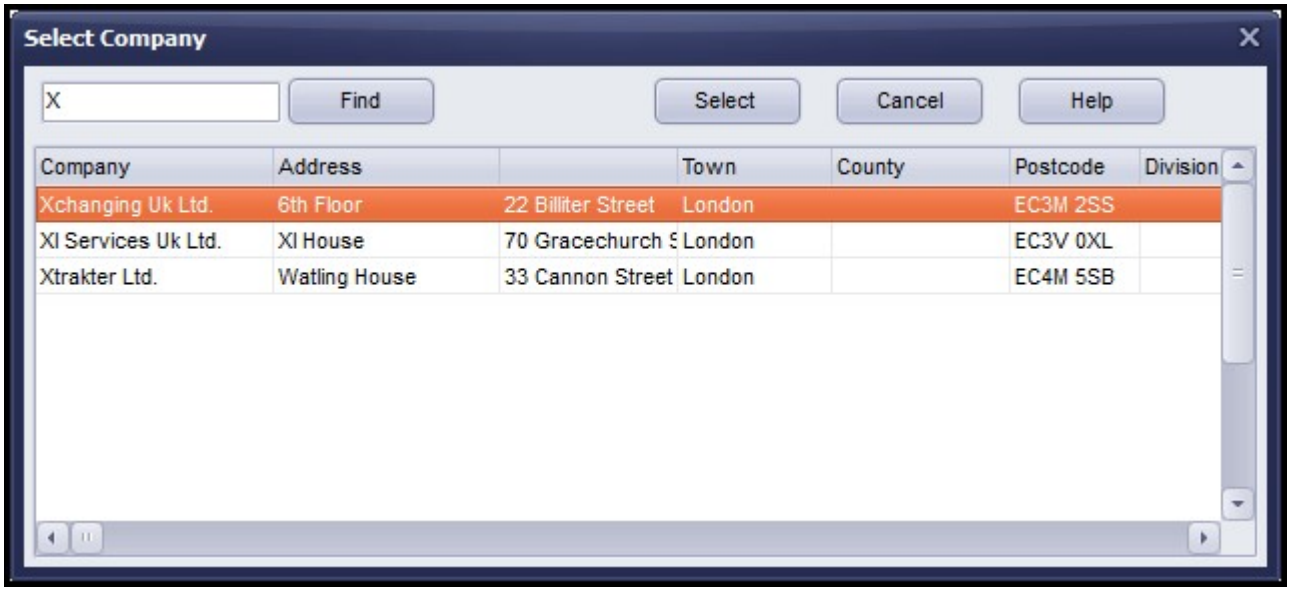
Person

I need to withhold a person from a company

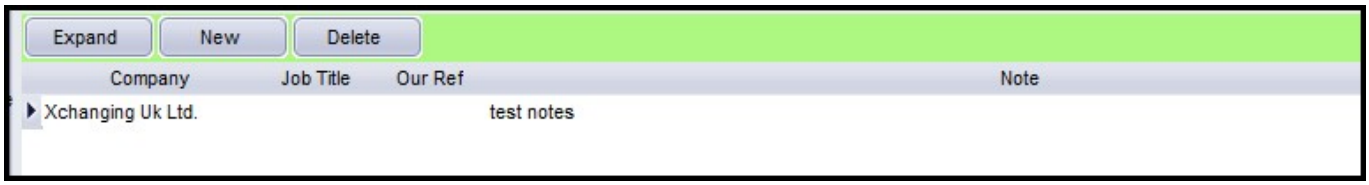
A candidate can be withheld from a company at their choice via Person – Withholds and selecting ‘New’.



The user can search for the required company and add notes to the withholding record.



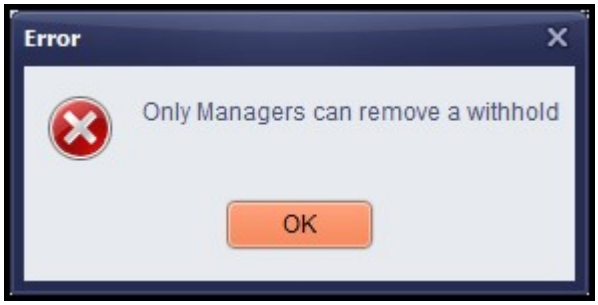




Removing a withhold in person

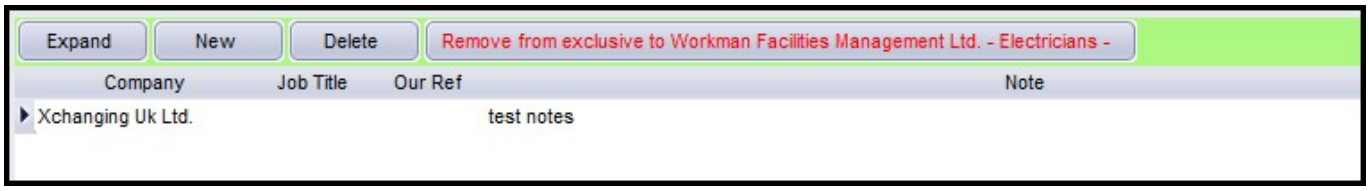
Removing a candidate from a company withhold in Person – Withholds is done using the Delete button.

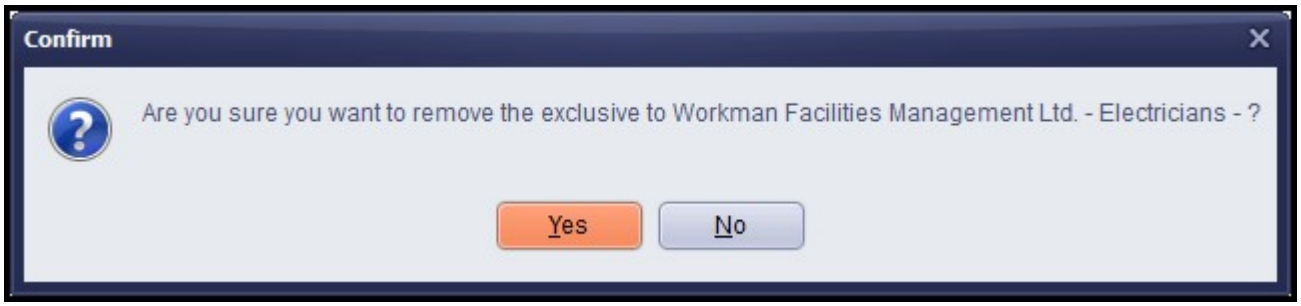
This can only be carried out by a user with a Manager role. Attempting to remove a withhold will display this message.



I want to remove an exclusive from within a person record.

If a candidate is 'Exclusive to a Vacancy' the following button will appear in Person – Withholds. To remove 'Exclusive to a Vacancy' click on this button.





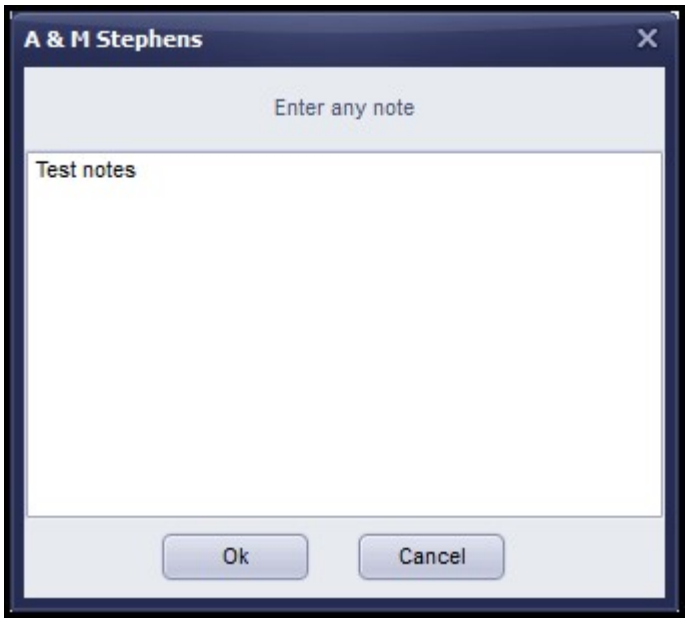
Company

I want to Withhold a Candidate from a Company or group of Companies

In Company – Withholds selecting New allows the User to search for a candidate to withhold and to add any associated notes.







If a company withhold is in a linked group, the user is offered the option to select just this company or all companies in the group.



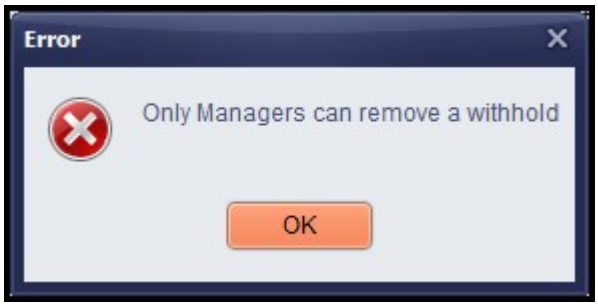


Note - a candidate withheld from a company will appear as withheld in every Company's Vacancy in the Withhold view.

Removing a withhold in Company

Removing a candidate from a vacancy or company withhold in Company – Withholds is done using the Delete button.

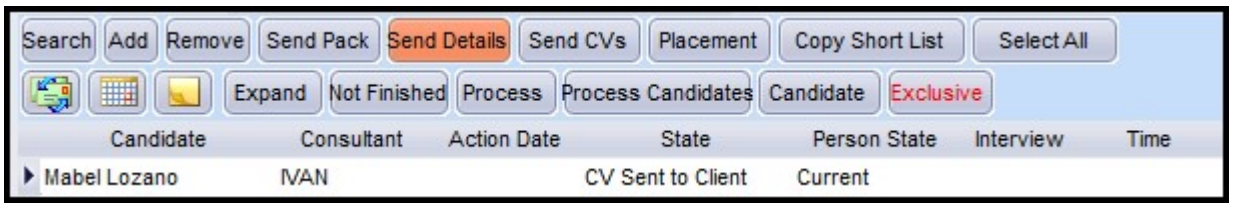
This can only be carried out by a user with a Manager role. Attempting to remove a withhold will display this message.

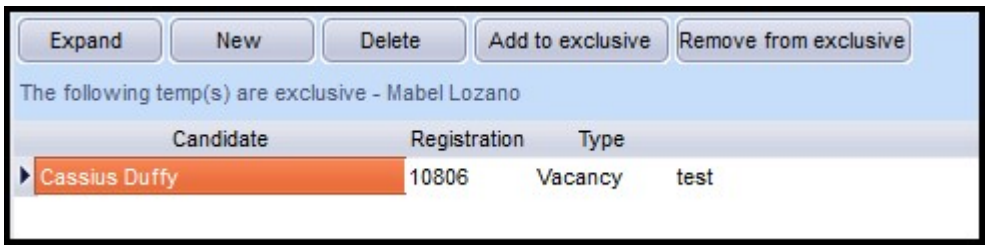


Vacancy

I want to make a candidate exclusive to a vacancy.

In Vacancy – Shortlist selecting a candidate as Exclusive is now recorded in Vacancy – Withholds.





Selecting ‘Add to exclusive’ in Vacancy – Withholds refers the user to vacancy Shortlist as normal.

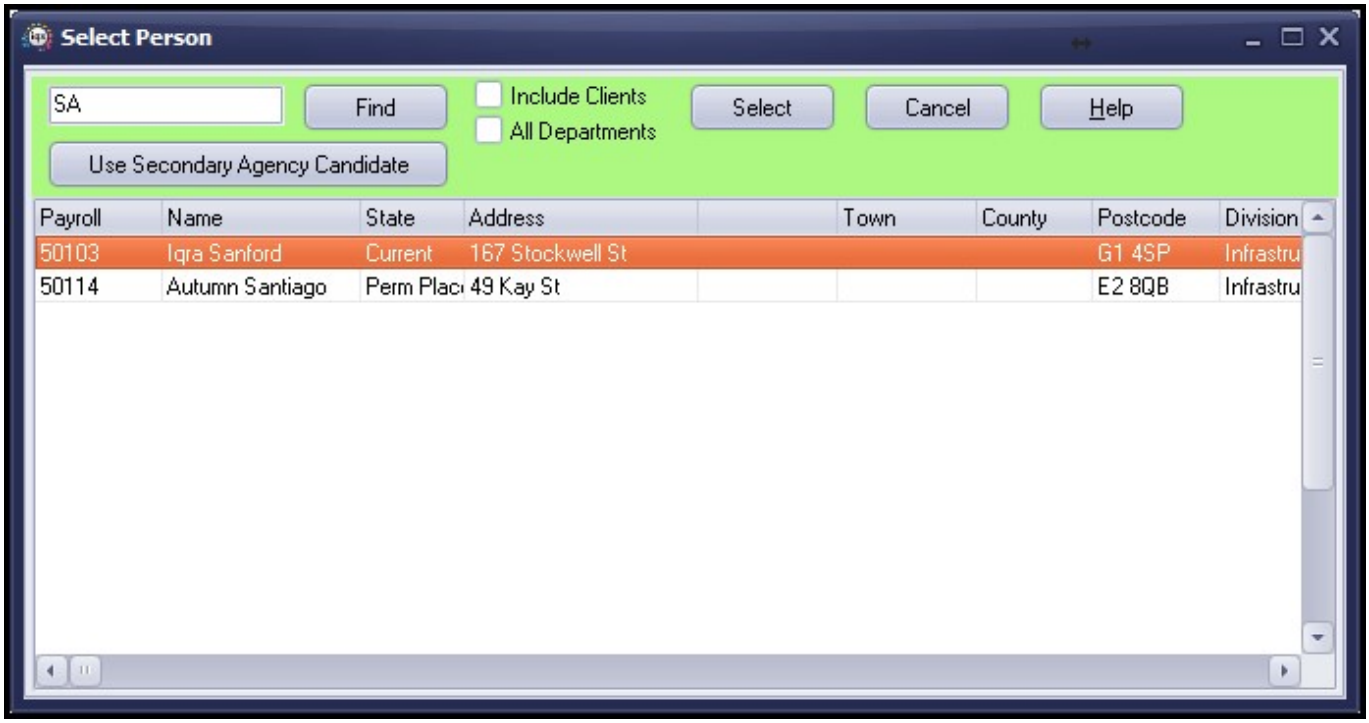


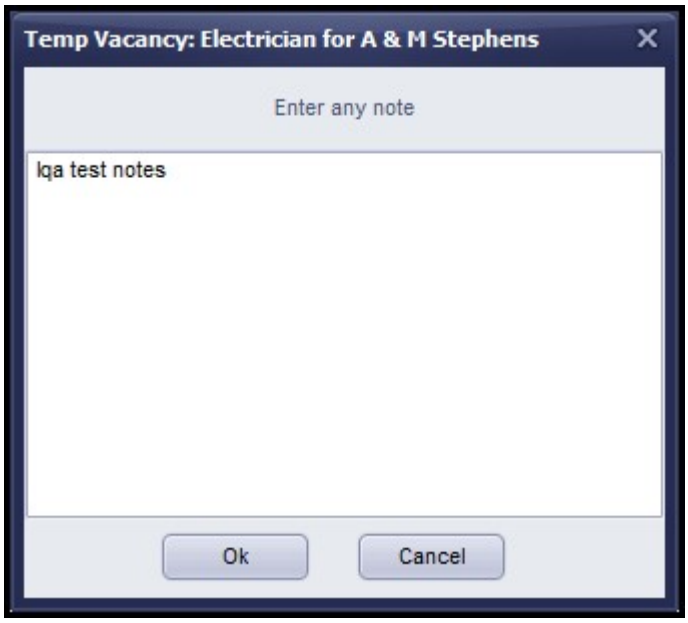
The candidate can be removed from Exclusive from within Vacancy Shortlist by clicking on the Exclusive button or in Vacancy – Withholds by selecting ‘Remove from Exclusive and selecting the required candidate from a drop-down list.



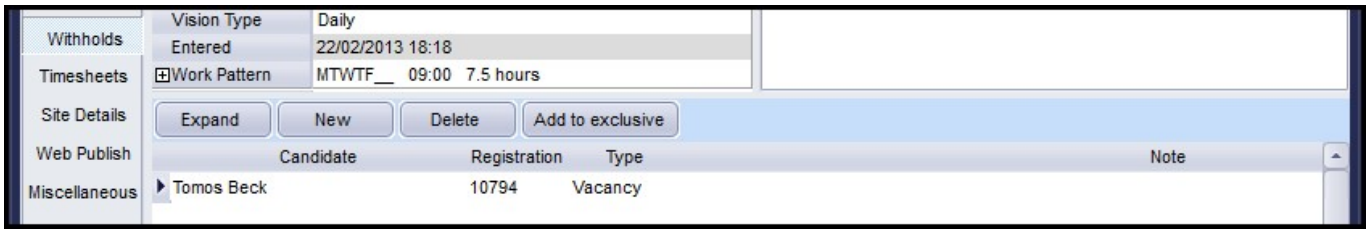
I want to withhold a candidate from a vacancy

In Vacancy – Withholds selecting New allows the User to search for a candidate to withhold and to add any associated notes.





The withhold is recorded in Vacancy – Withholds



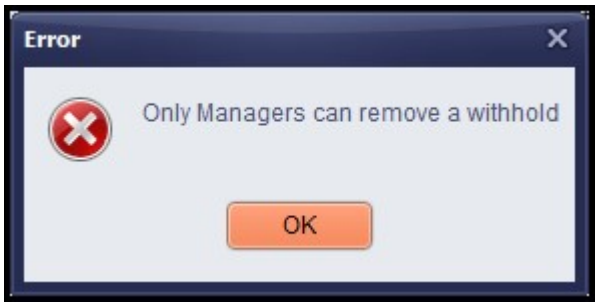
and in the related Company – Withholds.



Removing a withhold in vacancy

Removing a candidate from a vacancy or company withhold in Vacancy – Withholds is done using the Delete button.

This can only be carried out by a user with a Manager role. Attempting to remove a withhold will display this message.



From:
https://iqxusers.co.uk/iqxhelp/ - **IQX**

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=new_withholds&rev=1492089652

Last update: **2017/11/16 21:57**