



Release 2.16.12

Note: If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

New Features

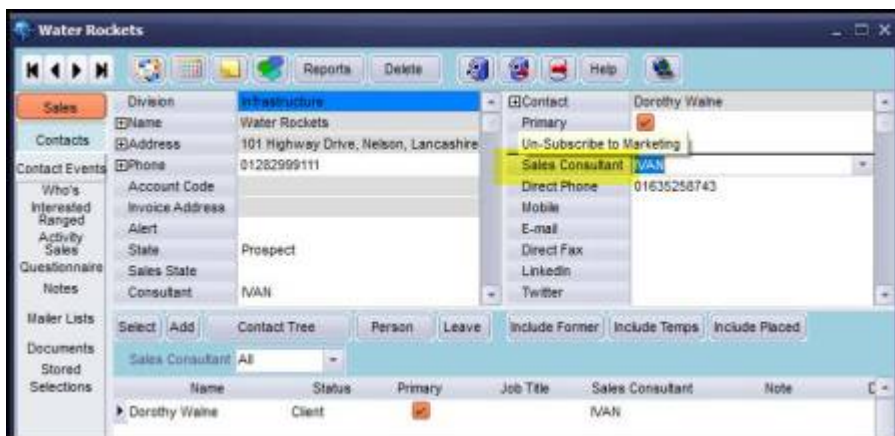
Users

New Sales Consultant/BD Role for Company and Contacts

Users with the new Sales Consultant role can filter contacts using the drop down visible in the Companies – Contacts Selector.



Contacts can be allocated in the top right view of a Company Contact record.



Sales information can be viewed in a new tab in the left hand side bar.

- Who's interested – records details of a User who has added the contact to their favourites view.
- Ranged Activity – displays time banded data related to Contact Events, Interviews, Invoice Count and Value, Placements and Vacancies.



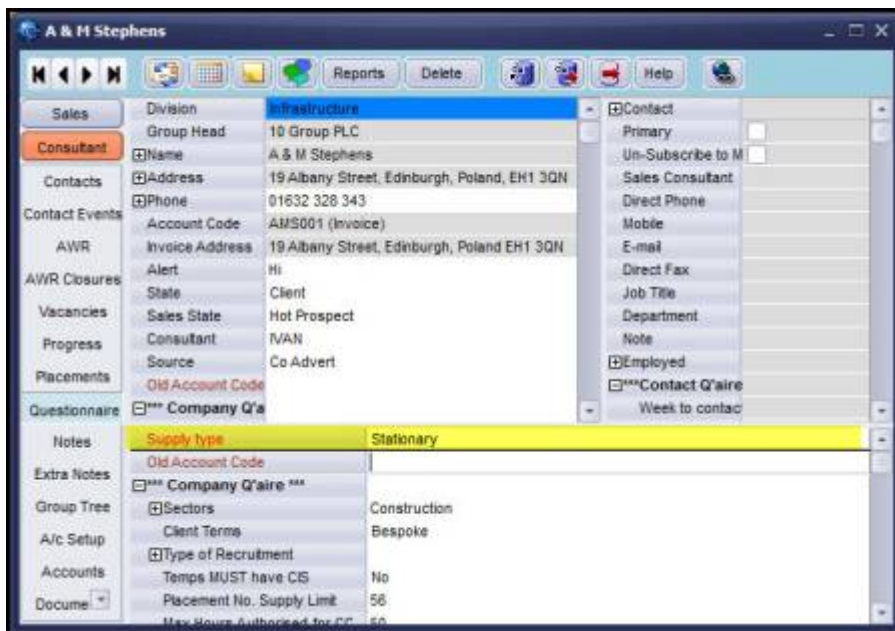
- Sales Questionnaire.
- Notes, Mailer Lists and Stored Sections are existing functionality.

This requires System Administrator set up.

Company Departmental Questionnaire for easier viewing

Departmental questionnaires for companies can now be added for each department. This functionality can be used to target questions at a department level and avoid having to scroll through long lists of irrelevant questions in the normal Company Questionnaire Section.

Once set up the Questions are visible on the Company record above the normal Company Questionnaire.



This requires System Administrator set up.

Candidate can have a Compliance Consultant

It is now possible to assign consultants as compliance user in a Person record.

The consultant appearing in this drop down list will all have a Compliance user role of 'Can maintain Clearance/Compliance'.



This requires System Administrator set up.

Streamlining of CV creation process

The process of replacing a CV with one created from a CV template has been streamlined by combining existing functions to improve work flow.

- In a Person Record – CV select Replace CV – Confirm Replace CV.
- Choose whether to keep searchable text (keeping this text allows it to be inserted into the new CV).
- CV Template view opens.

Person Bulk Emails can be in html

It is possible to send simple html Bulk Emails with a signature and have contact events recorded against each recipient of the email.

When using the Bulk Email button on the Person Selector the email will be sent with the selected recipients BCC'd.

This requires System Administrator set up.

Broadbean - rejected candidates can have a reason noted

When reviewing Broadbean Vacancy applications users can reject a candidate using the Reject



button. The reason for rejecting a candidate can be recorded and is displayed on the far right of the Broadbean Import view.

It is also possible to filter your application based on whether the applicant has been rejected or not using the Rejection filter.

App. Time	Channel Name	Import Listed	Email Body	Rejection Reason	Rejection Reason Date
01/12/2016 1	Broadbean Test Board	☒	(Memo)		
02/12/2016 1	Jobs Cabinet (Test Board)	☐	(Memo)	Rejected	02/12/2016

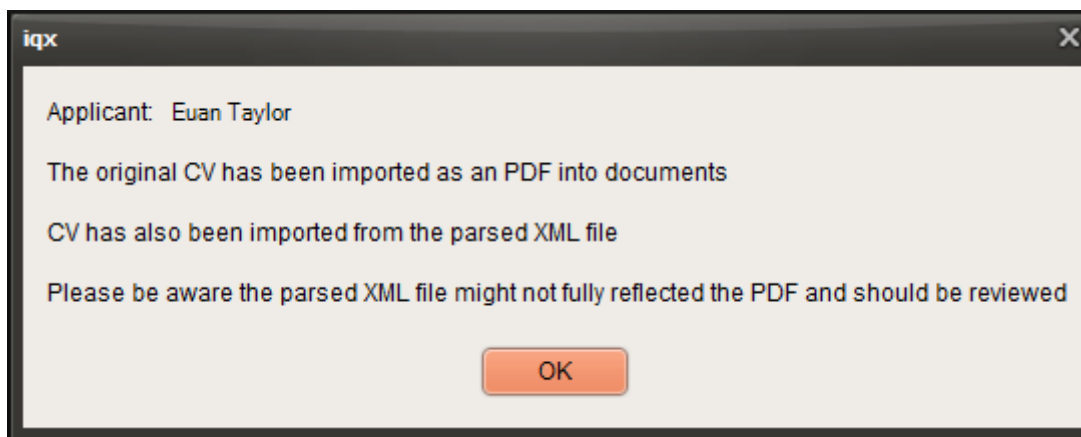
This requires System Administrator set up.

Broadbean - PDF CVs saved to Documents

Broadbean candidates can submit CVs in pdf format. IQX has been updated to allow the information contained in pdf CVs to be imported into IQX.

- When a pdf CV is imported into IQX the CV text is stored in Person - CV.
- The pdf CV is stored in Person - Documents with a title of Broadbean CV.

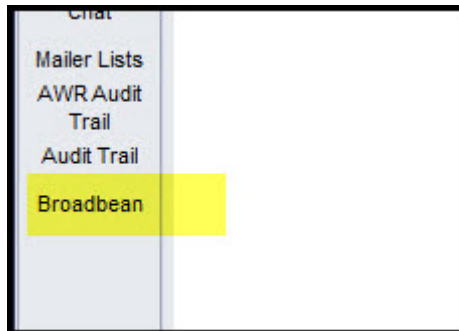
As the pdf file is being converted to text some formatting may be lost so the CV text will need to be checked. Users will see the below message while importing the CV as a reminder to double check the contents of the CV text.



There is also a new tab, Broadbean, on the outlook view beneath Audit Trail that records Broadbean status of applications.



Note: The Broadbean tab will only show when an application has been sought.



Availability entered via Diary can have Contact Event auto-created

Auto Contact event functionality has been extended to Availability set in Person – Diary.



Pop'pie Aco'sta

Navigation: Reports, Register, Delete, Search, Help, Registration Report

Temp Division: **Infrastructure**

Contact Events: Name: Pop'pie Aco'sta, State: Current, Available From: 07/12/2016

Get in Touch: Personal: Female 54, Home Phone: 01635000012, Day Phone: 07000965356, Mobile: 07000965356, E-mail: Poppie_Acosta@iqx.co.uk

Diary: Shifts, Shift Progress, Availability, Requirements, CV

Questionnaire: Notes, 2nd Notes, Web, Reference, Reference, History, Progress, Placements, AWR, Timesheets, Payroll, Payroll, Address, STI Worker, Enq, Location Map, CIS (2007), Temp Desks, Photo

Headline: Alert, Reg. Departments, Dept. Questionnaire, HP Source, ***Person Q'aire***, Location Zone: Any Area, Emergency Contact, Driving Licence: Full, Clean, Languages, Do not mailmerge UN

Book, Confirm, Print, Add: Availability ? 60 30 20 15 10 Go To < >

	Mon 12/12/16	Tue 13/12/16	Wed 14/12/16	Fri 15/12/16	Fri 16/12/16	Sat 17/12/16	Sun 18/12/16
12 AM			Available (whole days)	Available (whole days)	Holiday		
1 AM			Available (part days)	Available (part days)			
2 AM			Available (specify...)				
3 AM			Avail Day 07:00 -19:00				
4 AM			Avail Early 05:00 -14:00				
5 AM			Avail Late 12:00 -22:00				
6 AM			Avail No response -				
7 AM			Holiday (whole days)				
8 AM			Holiday (part days)				
9 AM			Holiday (specify...)				
10 AM			Unavailable (whole days)				
11 AM			Unavailable (part days)				
12 PM			Unavailable (specify...)				
1 PM		Unavailable					
2 PM		Unknown					
3 PM		12:00-00:00					
4 PM							
5 PM							
6 PM							
7 PM							
8 PM							
9 PM							
10 PM							
11 PM							



Pop'pie Aco'sta

Navigation: Reports Register Delete Search Help Registration Report

Temp Division: Infrastructure

Contact Events

Get in Touch

Diary

Shifts

Shift Progress

Availability

Requirements

CV

Questionnaire

Notes

2nd Notes

Web

Reference

Reference

History

Personal

Female 54

Home Phone

Day Phone

01635000012

Mobile

07000965356

E-mail

Poppie_Acosta@iqx.co.uk

Social Media

Address

321 Newb'old Place, Wellesbourne,

Headline

Alert

Reg. Departments

Dept. Questionnaire

HP Source

Person Q'aire

Location Zone

Any Area

Emergency Contact

Driving Licence

Full, Clean

Languages

Do not mailmerge UN

Expand Contact Type All Own Type No Consultant All Limit To All Process ?

Consultant	Contact Type	Date	Time	Contact Summary	Link
IVAN	Availability Notification ...	13/12/2016	14:37	Unavailability Notified Diary	
IVAN	Availability Notification ...	13/12/2016	14:37	Availability Notified	
IVAN	Availability Notification ...	13/12/2016	14:28	Holiday Notified	
IVAN	Change Interview	09/12/2016	15:23	Mail Merge Letter	
IVAN	BD Call	09/12/2016	15:23	Mail Merge Email: test	
IVAN	Candidate Cancel a Bo...	09/12/2016	15:19	Mail Merge Email: test	

The Contact Events differentiate between Availability, Unavailability and Holidays.

If the same availability type e.g. holidays, is added consecutively only one contact event will be generated.

This requires System Administrator set up.

All Notes views can have coloured text to show data exists

It is now possible to amended the colour of Memo type items in the left hand bar in a record. E.g. Notes, Extra Notes.

The change of colour is activated when text has been entered into that field.

This requires System Administrator set up.



ABBA Ltd

Sales Division Infrastructure

Consultant

Name ABBA Ltd

Address 63 New Street, Cambridge, CB1 2QT

Phone

Account Code ABBA01 (Invoice)

Invoice Address 63 New Street, Cambridge CB1 2QT

Alert

State Prospect

Sales State

Consultant

Source None

Old Account Code

Company Q'a

Sectors Construction

Contact

Primary

Un-Subscribe to M

Sales Consultant

Direct Phone

Mobile

E-mail

Direct Fax

Job Title

Department

Note

Employed

Contact Q'aire

Week to contact

Insert Text Spell Check

A M Best Europe - Rating Services Ltd.

Sales Division Infrastructure

Consultant

Name A M Best Europe - Rating Services Ltd.

Address 12 Arthur Street, London, EC4R 9AB

Phone 01835340064

Account Code 321321 (Invoice)

Invoice Address 12 Arthur Street, London EC4R 9AB

Alert

State Prospect

Sales State

Consultant

Source None

Old Account Code

Company Q'a

Sectors

Contact

Primary

Un-Subscribe to M

Sales Consultant

Direct Phone

Mobile

E-mail

Direct Fax

Job Title

Department

Note

Employed

Contact Q'aire

Week to contact

Insert Text Spell Check

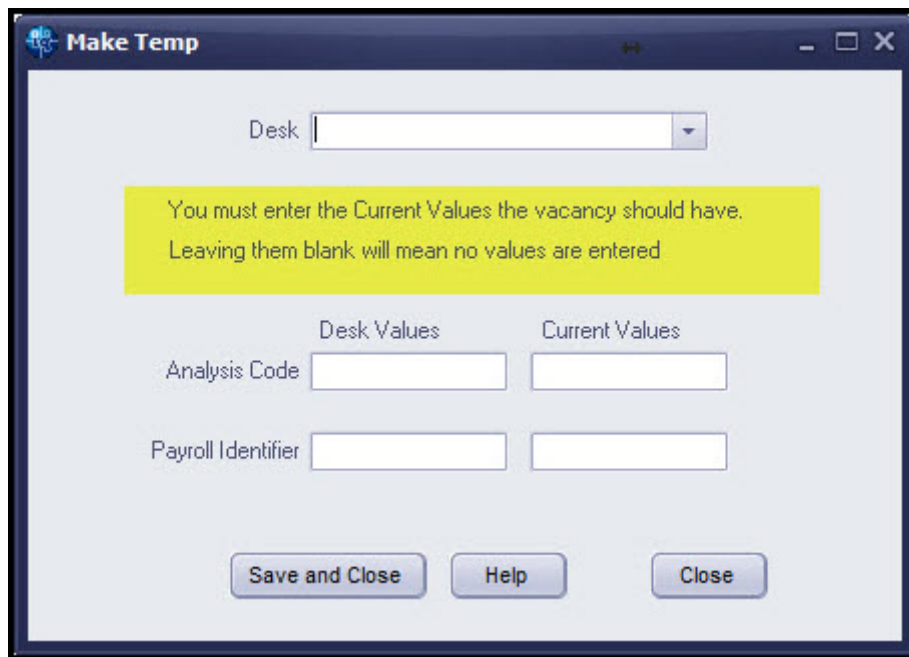
Extra Notes Client is involved in all sections of commerce

Group Tree Preferred band A staff

A/c Setup

Improved details when making a Vacancy Perm to Temp

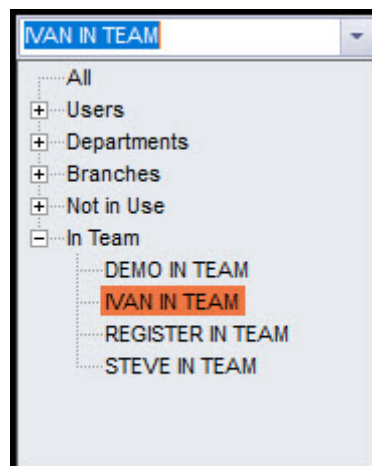
When converting a vacancy from permanent to temporary a warning to enter Current Values for the Vacancy has been added. This informs users that Leaving the Make Temp values blank will result in no values being entered.



Note: If you leave the values blank it will not show on any Temp-Desks.

Vacancy Teams can be default selection on Desktop instead of Consultant

In Desk Top, consultants can have their default view set to their Vacancy Team instead of their consultant view.



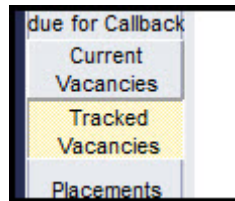
This requires System Administrator set up.

New Vacancy tab on DeskTop to show another group by state

A new tab under Current Vacancies called Tracked Vacancies can now be added to display vacancies



of a particular Vacancy state. Works in the same way that the Current Vacancies tab does.



This requires System Administrator set up.

Vacancy - Shift Progress enhancements

In Vacancy - Shift Progress a new Fill button has been added which opens up the Fill Vacancy wizard allowing another route to booking a candidate to a vacancy.

In addition, a new column 'Our Ref' has been added along with a Hide Filled (shifts) button.

Diary	From 30/07/2012						
Shifts	Shifts from 30/12/2008	Candidate	History	Fill	Send Pack	Hide Filled	
Shift Progress	Date	From	To	Our Ref.	Candidate	State	Description
AWR	21/11/2016	08:00		15336	Pop'pie Aco'sta	Awaits Contact	Day
Questionnaire	21/11/2016	08:00		15336	Will Barr	Awaits Contact	Day
	21/11/2016	08:00		15336	Carson Bernard	Awaits Contact	Day

There is now also a visual indicator that a shift has a shortlist, this can be seen on the Vacancy - Shift where the background of the shift is coloured.



Temp Vacancy: Labourer for Badenoch & Clark Ltd.

Navigation: Reports Search Delete Help Switch Job Desc Broadbean ABC

Contact Events
Company: Badenoch & Clark Ltd.
Contact: Ismaeel Love
Job Title: Labourer

Requirements
No. of Posts: 2
PO Number:
Dates: From 11/11/2016
Pay / Charge: 12.00 / 17.00
Status / Codes: Filled / Completed / Our Ref: TEST4 / Contract Ref: TEST5
Dept./Desk/Consul: Construction / Demo - Construction / IVAN

Shifts
Client Department:
This is a test of the
T&C's Sent:
Vision Type: Daily
This is a test of the

Shifts from 01/11/2016 to
Unfilled Provisional Confirmed Worked Cancelled Send Pack Legend

Count Placement / Rates Candidate Add Fill Confirm Cancel Process Process Candidates

	Date	From	To	Break	Candidate	Description - Client Note	Our Ref.	Their Ref.	Essential Skill(s)	Grade
Web Publish	Sun 20/11/16	08:00	17:30	60		Day -	17920			
Miscellaneous	Sun 20/11/16	08:00	17:30	60		Day -	17919			
Location Map	Sat 19/11/16	08:00	17:30	60		Day -	17917			
Shift Templates	Sat 19/11/16	08:00	17:30	60		Day -	17918			
Vacancy Limits	Fri 18/11/16	08:00	17:30	60	Inaya Buchanan	Day -	17916			
Documents	Fri 18/11/16	08:00	17:30	60		Day -	17915			
Cascade Rules	Thu 17/11/16	08:00	17:30	60		Day -	17913			
Cascaded	Thu 17/11/16	08:00	17:30	60		Day -	17914			
Shifts	Wed 16/11/16	08:00	17:30	60		Day -	17912			
Cascade	Wed 16/11/16	08:00	17:30	60		Day -	17911			
History	Tue 15/11/16	08:15	17:30	60		Day -	17910			
Vacancy Roles	Tue 15/11/16	08:00	17:30	59		Day -	17909			
Sec Agency	Mon 14/11/16	08:00	17:30	60		Day -	17907			
Rates	Mon 14/11/16	08:00	16:00	60		Day -	17908			
Compliance										
Questionnaire										
Modify Screen										
Appointm...										

Shift shortlist can be set up from the shift screen in the temp desk.



2026/09/22 03:31

12/26

Release 2.16.12

Shifts

Desk: Demo - Construction

From: 11/11/2016 to Today

State: ☒ Unfilled ☐ Confirmed ☐ Worked ☐ Cancelled

Cascade: ☒ Non-Cascadeable ☒ Cascadeable ☒ Cascaded

Count Process Filter Shifts Add Shifts Bulk Cancel Unfilled

Temp	Company	Vacancy	Odd Ref.	Date	From	To	Break	Description	Our Ref.	Their Ref.	Essential
	Badenoch & Clark Ltd.	Labourer	A pln	Mon 14/11	08:00	17:30	60	Day	17907		
	Badenoch & Clark Ltd.	Labourer	A pln	Mon 14/11	08:00	16:00	60	Day	17908		
	Badenoch & Clark Ltd.	Labourer	A pln	Tue 15/11	08:00	17:30	59	Day	17909		
	Badenoch & Clark Ltd.	Labourer	A pln	Tue 15/11	08:15	17:30	60	Day	17910		
	Badenoch & Clark Ltd.	Labourer	A pln	Wed 16/11	08:00	17:30	60	Day	17912		
	Badenoch & Clark Ltd.	Labourer	A pln	Wed 16/11	08:00	17:30	60	Day	17911		
	Badenoch & Clark Ltd.	Labourer	A pln	Thu 17/11	08:00	17:30	60	Day	17913		

Details Quick Fill Short List Cascade History Audit Trail Questionnaire

Expand Temp Book Temp Previously used employees highlighted Send Pack

Name	History	Consultant	State	Note	Rejection Reason	Entered
Teagan Anderson	+	IVAN	Awaits Contact			08/12/2016 12
Will Barr	+	IVAN	Awaits Contact			08/12/2016 12
Carson Bernard	+	IVAN	Awaits Contact			08/12/2016 12

Shifts

Desk: Demo - Construction

From: 11/11/2016 to Today

State: ☒ Unfilled ☐ Confirmed ☐ Worked ☐ Cancelled

Cascade: ☒ Non-Cascadeable ☒ Cascadeable ☒ Cascaded

Count Process Filter Shifts Add Shifts Bulk Cancel Unfilled

Temp	Company	Vacancy	Odd Ref.	Date	From	To	Break	Description	Our Ref.	Their Ref.	Essential
	Badenoch & Clark Ltd.	Labourer	A pln	Mon 14/11	08:00	17:30	60	Day	17907		
	Badenoch & Clark Ltd.	Labourer	A pln	Mon 14/11	08:00	16:00	60	Day	17908		
	Badenoch & Clark Ltd.	Labourer	A pln	Tue 15/11	08:00	17:30	59	Day	17909		
	Badenoch & Clark Ltd.	Labourer	A pln	Tue 15/11	08:15	17:30	60	Day	17910		
	Badenoch & Clark Ltd.	Labourer	A pln	Wed 16/11	08:00	17:30	60	Day	17912		
	Badenoch & Clark Ltd.	Labourer	A pln	Wed 16/11	08:00	17:30	60	Day	17911		
	Badenoch & Clark Ltd.	Labourer	A pln	Thu 17/11	08:00	17:30	60	Day	17913		

Details Quick Fill Short List Cascade History Audit Trail Questionnaire

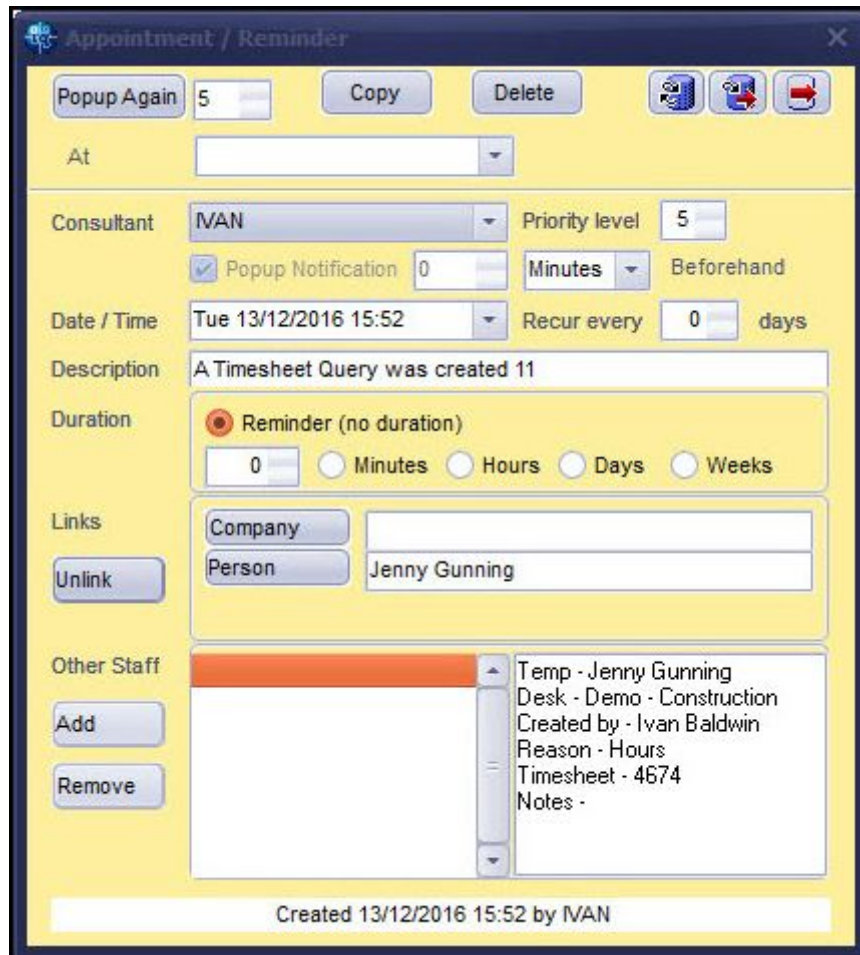
Expand Temp Book Temp Add to Short List Previously used employees highlighted

Search: Current in Department ☐ Match Explicit Availability Only ☐ Apply Vacancy Search Criteria

Name	Alert	Ref.	Date	From	To	Description	Mins	Status	Miles
Anderson, Teagan		17...	14/11/2016	08:00	17:30	Day		Possibly Available	
Barr, Will		17...	14/11/2016	08:00	17:30	Day		Possibly Available	165
Bryant, Scott		17...	14/11/2016	08:00	17:30	Day		Possibly Available	160
Buchanan, Inaya	son	17...	14/11/2016	08:00	17:30	Day		Possibly Available	4
Cook, Constance		17...	14/11/2016	08:00	17:30	Day		Possibly Available	168
Mcguire, Gabriela		17...	14/11/2016	08:00	17:30	Day		Possibly Available	
Mcintyre, Jared		17...	14/11/2016	08:00	17:30	Day		Possibly Available	165
Mcmillan, Dexter		17...	14/11/2016	08:00	17:30	Day		Possibly Available	165
Mendez, Lily-Rose		17...	14/11/2016	08:00	17:30	Day		Possibly Available	167
Mercer, Junior		17...	14/11/2016	08:00	17:30	Day		Possibly Available	162
Nolan, Wyatt		17...	14/11/2016	08:00	17:30	Day		Possibly Available	160
Rich, Brandon	Construction A...	17...	14/11/2016	08:00	17:30	Day		Possibly Available	89
Singh, Martha		17...	14/11/2016	08:00	17:30	Day		Possibly Available	163
Stein, Joey		17...	14/11/2016	08:00	17:30	Day		Possibly Available	160
Ware, Liliana		17...	14/11/2016	08:00	17:30	Day		Possibly Available	166

Timesheet Queries - Improve notifications to Front Office

When a query is raised by an Accounts user against a provisional timesheet popups can be sent to all users in the same tempdesk provided they do not have an Accounts role.



The screenshot shows the 'Appointment / Reminder' dialog box. It has a yellow background and a dark blue title bar. The dialog contains several sections:

- Top Bar:** Includes a 'Popup Again' button with a value of 5, a 'Copy' button, a 'Delete' button, and three small icons (a calendar, a person, and a document).
- At:** A dropdown menu.
- Consultant:** A dropdown menu showing 'IVAN'.
- Priority level:** A dropdown menu showing '5'.
- Popup Notification:** A checkbox that is checked, followed by a value of 0.
- Minutes:** A dropdown menu showing 'Beforehand'.
- Date / Time:** A dropdown menu showing 'Tue 13/12/2016 15:52'.
- Recur every:** A dropdown menu showing '0' days.
- Description:** A text field containing 'A Timesheet Query was created 11'.
- Duration:** A section with a radio button selected for 'Reminder (no duration)', followed by a value of 0 and options for 'Minutes', 'Hours', 'Days', and 'Weeks'.
- Links:** A section with a 'Company' dropdown and a 'Person' dropdown showing 'Jenny Gunning'. There is an 'Unlink' button.
- Other Staff:** A section with an 'Add' button, a 'Remove' button, and a list of staff members. The list includes 'Temp - Jenny Gunning', 'Desk - Demo - Construction', 'Created by - Ivan Baldwin', 'Reason - Hours', 'Timesheet - 4674', and 'Notes -'.
- Footer:** A status bar showing 'Created 13/12/2016 15:52 by IVAN'.

The existing Temp Desk queries message on Temp Desk now shows a count of Timesheet queries.

This requires System Administrator set up.

Improved Source Functionality

In order to provide flexibility in naming sources for different record types (Company, Vacancy, Candidate) and providing the option to allocate sources to divisions Agency Setup - Sources have changed.

The function of sources within records has not changed.

The Reports and Validations which use vacancyclass will need amending to use the originid table.



This requires System Administrator set up.

Active Directory Single sign on

It is now possible to silently log into IQX using Active Directory protocols. Provided a user has the required permissions, and security setup clicking on the IQX icon will silently log the user into IQX.

Where there is an error with the Active Directory setup the login will default to a standard login dialogue box.

Active Directory setup will require System Administrator/IT department set up.

Login failures - improved explanations

More explanation has been added when connections fails. There are four different types of failure and each having different warning messages.

- When a wrong user id or password is entered the warning message will be - 'Invalid username or password'.
- If a user tries to login using a defunct user login the message will be - 'User is not currently authorised'.
- If trying to login to a missing database or the wrong database this warning message will appear - 'Database name incorrect or not set up'.
- Any other form of error will produce - 'Database connection error' with a button for further details.

Colour Enhancements to Questionnaires for readability

Questionnaires have been modified to allow the use of 60 characters in questions, choices and sub-choices.

In addition, font colours can be added to the questionnaire captions in Departmental and General questionnaires. The fonts are set up by adding a colour to the furthest right column of a question.



Long Description	Font Colour
	0
	0
	0
	0
	0
	0

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish	Web View	Search Hide	Heading Collapse	Heading Answers	Expiry Lead	Expiry Behaviour	Long Description	Readonly	Font Colour
2	HPS	HP Source	Single Selection			☐	0	☐	☐	☐	☐	☐	☐	☐	☐		☐	255
10	HHH	***Person Q'aire***	Heading			☐	0	☐	☐	☐	☐	☐	☐	☐	☐		☐	0
40	LOC	Location Zone	Single Selection			☒	0	☒	☒	☒	☐	☐	☐	☐	☐		☐	0
50	NK	Emergency Contact Details	Text			☐	0	☒	☒	☒	☐	☐	☐	☐	☐		☐	0
60	DRI	Driving Licence	Single Selection			☒	0	☐	☐	☐	☐	☐	☐	☐	☐		☐	8388863
70	LAN	Languages	Graded Selection			☐	0	☐	☐	☒	☐	☐	☐	☐	☐		☐	0

Temp Division: Infrastructure

Name: Pop'pie Aco'sta

State: Current

Available From: 07/12/2016

Personal: Female 54

Home Phone: 01635000012

Day Phone: 01635000012

Mobile: 07000965356

E-mail: Poppie_Acosta@iqx.co.uk

Social Media:

Address: 321 Newb'old Place, Wellesbourne,

Headline:

Alert:

Reg. Departments:

Dept. Questionnaire:

HP Source:

Person Q'aire:

Location Zone: Any Area

Emergency Contact:

Driving Licence: Full, Clean

Languages:

Do not mailmerge UN:

Expand Contact Type: All Own Type: No Consultant: All Limit To: All Process ?

Accounts Contact Type: Date: Time: Contact Summary: Link: Outcome:

Compliance:

Reports can be restricted to highlighted data

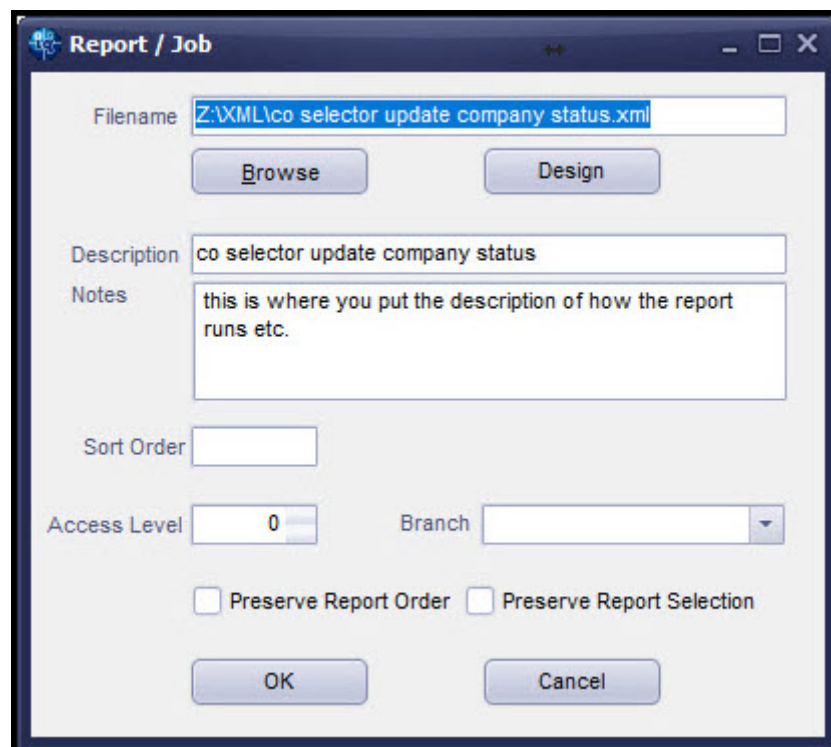
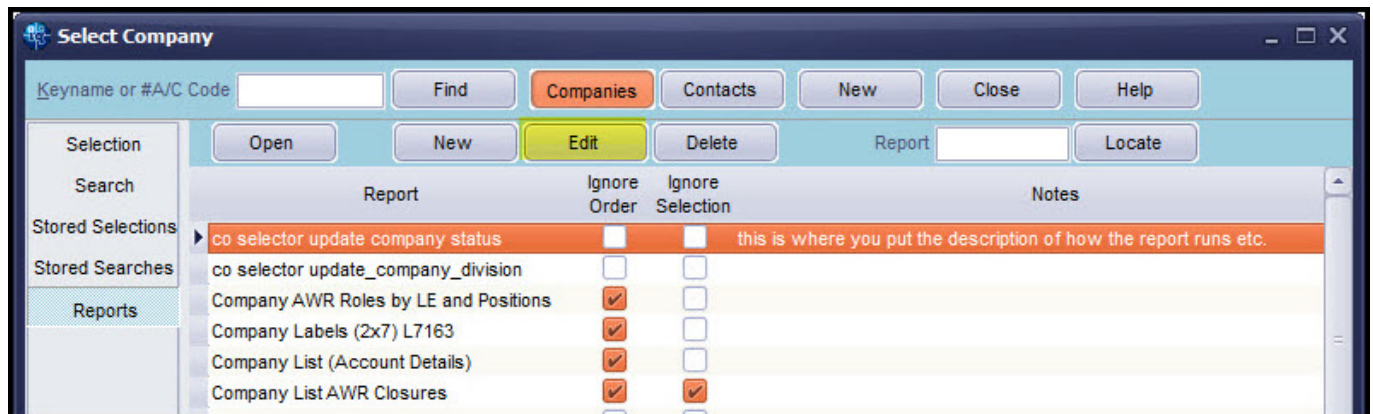
The multi-select functionality currently used in Mail Merge has been extended to Reports.

Select the records to be the focus of the report, select the appropriate report, choose either All records or Highlighted records, from the drop down dialogue box, and run the report. If you chose Highlighted Records the report will be run against those records and not all records in the selector screen.



Reports views show notes column

In the Reports view a notes column has been added so that additional information about the report can be saved. The Notes column is populated by selecting a report and clicking edit. The Notes section can be filled in the next dialogue box.



Documents checked for size on addition

Compliance and other documents can have a maximum file size set to stop over large files being saved to the database.

If an overlarge file is loaded the import is stopped and a warning message appears.



This requires System Administrator set up.

Contact Events types can be restricted to user filter

A User's view of contact events in a record can be filtered according to their own Contact event types or all.

The screenshot shows the user profile for Ivan Baldwin. The 'Roles' section is expanded, showing a list of roles. The 'Combo Box Filter' is set to 'S'. The 'Role Group' is set to 'All'. The 'Search' button is visible. The 'Roles' table is as follows:

Group	Role	Search Criteria	Group Assigned	Expires	Notes
GENERAL	Permanent Consultant		☒		Key role: user must ...
GENERAL	Temp Consultant		☒		Key role: user must ...

The filter is applied in the records by selecting Yes in the Own Type drop down box in the contact events view in Company, Company Contacts and Person.

The screenshot shows the contact events view for Ivan Baldwin. The 'Own Type' dropdown is set to 'Yes'. The table shows contact events for Ivan Baldwin, filtered by 'Sales Lead First Contact' and 'Sales Lead Proposal'.

Consultant	Contact Type	Date	Time	Contact Summary
IVAN	Mailchimp	01/12/2016	17:16	Mailchimp Subscriber
IVAN	Sales Lead First Contact	13/09/2016	14:25	
IVAN	Sales Lead First Contact	13/09/2016	14:07	test3
IVAN	Sales Lead Proposal	13/09/2016	14:04	Test2

The filter will display those Contact Events matching the combo box type and Contact events without a combo box filter.

Pop Up notification can be set in Days as well as Minutes

Pop up notifications can now be set in days as well as minutes. The maximum number of days that can be set is 21 days or 30240 minutes.

System Administrator

Setup Sale Consultant/BD Role

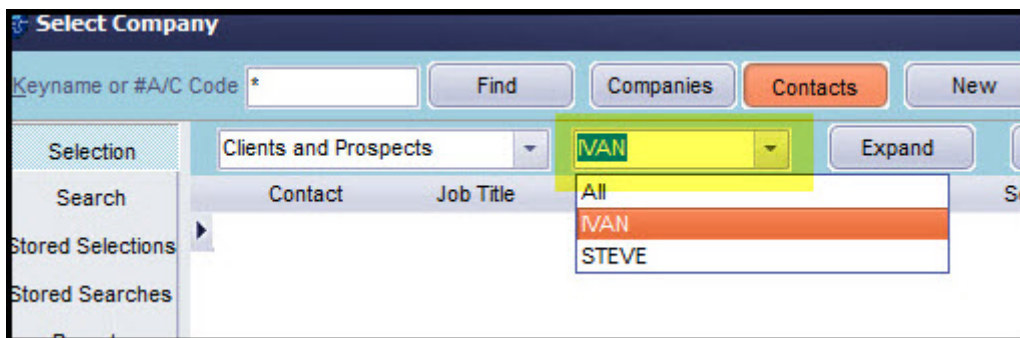
A new switch and role has been added to Company contacts so that Consultants can own contacts.

The role can be added in Maintenance - Users.

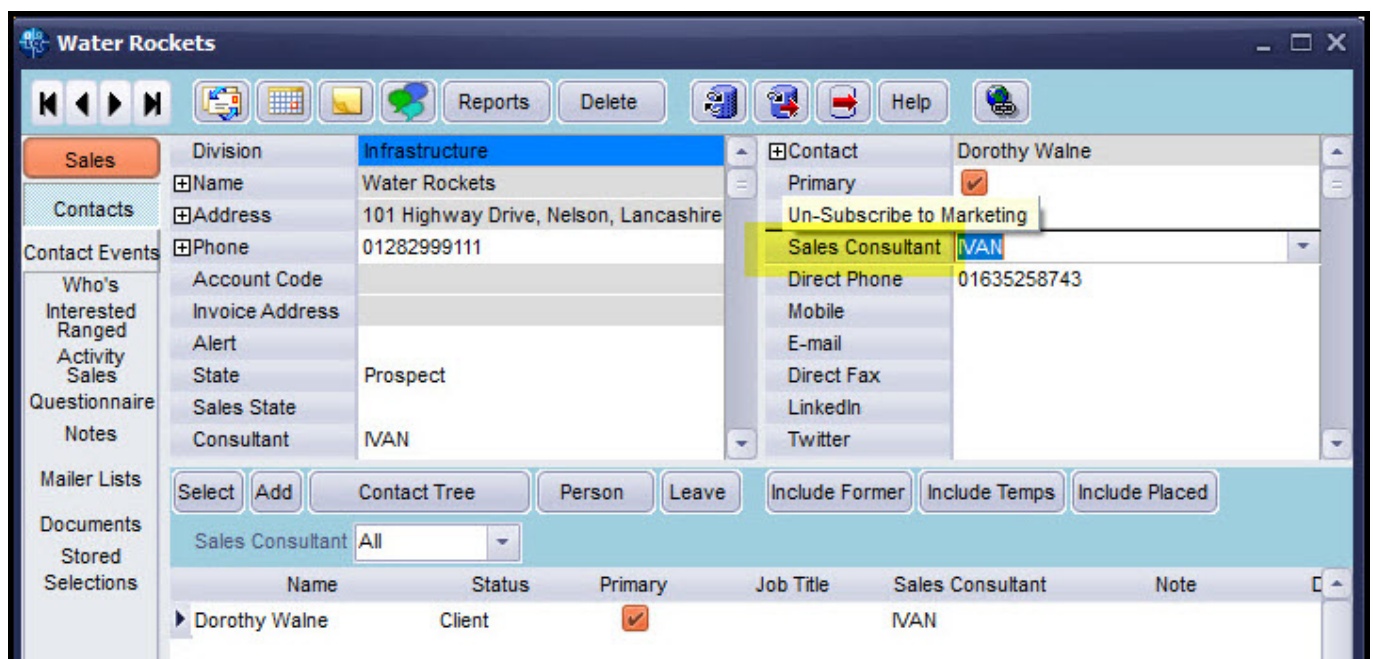
The Terminology can be amended in General Settings - Terminology - 111 and 112.

111 Terminology	Sales Staff Name	Sales Consultant
112 Terminology	Sales Staff Plural Name	Sales Consultants

With the Sales consultant role contacts can be filtered using the drop down visible in the Companies - Contacts Selector.



Contacts can be allocated in the top right view of a Company contact record.





Sales information can be viewed in a new tab in the left hand vertical tool bar.

- Who's interested - records the user details of a User who has added the contact to their favourites view.
- Ranged Activity - displays time banded data related to Contact Events, Interviews, Invoice Count and Value, Placements and Vacancies.
- Sales Questionnaire - Sales Questions set up using Sales Question grouping -100 in Company Questionnaire.
- Notes, Mailer Lists and Stored Sections are existing functionality.

Setup Company Departmental Questions

Departmental questionnaires for companies can now be added for each department. This functionality can be used to target questions at a department level and avoid having to scroll through long lists of irrelevant questions in the normal Company Questionnaire Section.

Once set up the Questions are visible on the Company record above the normal Company Questionnaire.

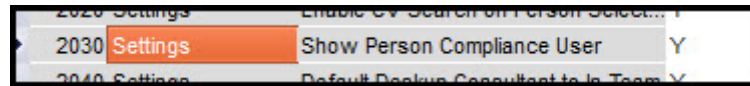
This is set up via Agency Setup - Departments - Select Department - Companies Button.

Setup Candidate Compliance consultant



It is now possible to assign consultants as compliance consultant in a Person record.

This functionality is activated in General Settings - Settings 2030 - Y the new field is visible under consultant in left window of a Person view. The consultant appearing in this drop down list will all have a Compliance user role of 'Can maintain Clearance/Compliance'.



Setup Users to use Bulk Person Emails

To grant users the ability to send bulk emails it needs to be set up in Maintenance - Users - Roles - Send Bulk Emails. Please note it requires HTTP Email to be set up or nothing is sent.

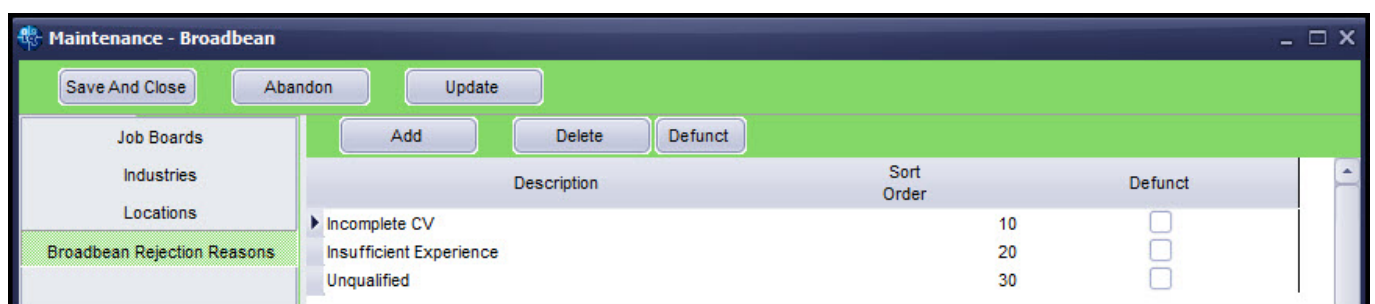
Setup Broadbean Users in bulk

Adding Broadbean User roles to many staff can now be done using the Bulk Broadbean Details button in Maintenance - Users.

Highlight the Users who require updating. Click the Bulk Broadbean Details button and select the consultant whose details you wish to copy.

Setup Broadbean Rejection reasons

The reasons that a user selects from are set up in Maintenance - Broadbean - Rejection Reason.



Setup Auto Contact Events when Availability Entered through Diary

Auto Contact event functionality has been extended to Availability set in Person - Diary.

The Contact Event Type used for these Contact Events is set up in General Settings - Temps - 440.

The Contact Events differentiate between Availability, Unavailability and Holidays.



If the same availability type e.g. holidays, is added consecutively only one contact event will be generated.

Setup Colour on Notes Views

Using General Settings - Colours - 530 Memo Colour it is now possible to amended the colour of Memo Type items in the Outlook bar in a record. E.g. Notes, Extra Notes.

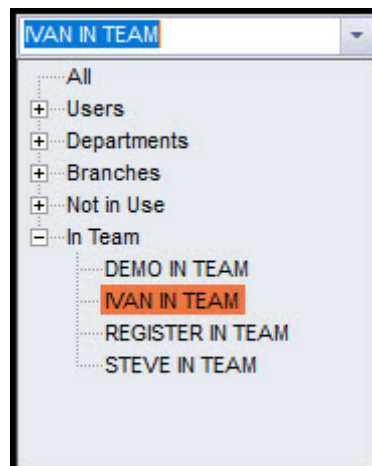
The screenshot shows the iqx software interface for 'ABBA Ltd'. The 'Notes' field is highlighted in blue, indicating the '530 Memo Colour' setting is active. The interface includes a sidebar with navigation options like Sales, Consultant, Contacts, and a main area with fields for Name, Address, Phone, and Account Code.

The screenshot shows the iqx software interface for 'A M Best Europe - Rating Services Ltd.'. The 'Notes' field is highlighted in pink, indicating the '530 Memo Colour' setting is active. The interface includes a sidebar with navigation options like Sales, Consultant, Contacts, and a main area with fields for Name, Address, Phone, and Account Code.

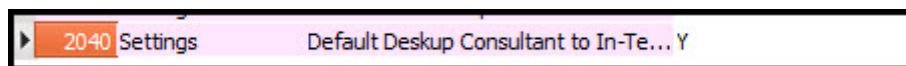
The change of colour is activated when text has been entered into that field.

Setup Vacancy Teams as default selection on Desktop instead of Consultant

In desk top consultants can have their default view set to their vacancy teams instead of their consultant view.

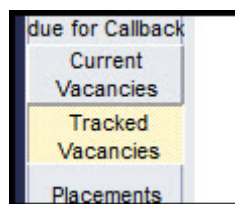


This is set up by setting General Settings – Settings 2040 – Default Deskup Consultant to In-Team – Y. Settings 1450 – Allow Vacancy Team must also be set to Y.



Setup New Vacancy tab on DeskTop to show another group by state.

A new tab under Current Vacancies called Tracked Vacancies can now be shown to display vacancies of a particular Vacancy state.



Set the Vacancy state you want to display in General Settings – Settings – 2070.

If Settings 2070 is left blank the Tracked Vacancy tab is not visible.

Setup Timesheet Queries - Improve notifications to Front Office

When a query is raised by an Accounts user against a provisional timesheet it is possible to have a popup generated which is sent to all users in the same tempdesk provided they do not have an Accounts role.

To set this up set General Settings – Temps 1070 to Y.

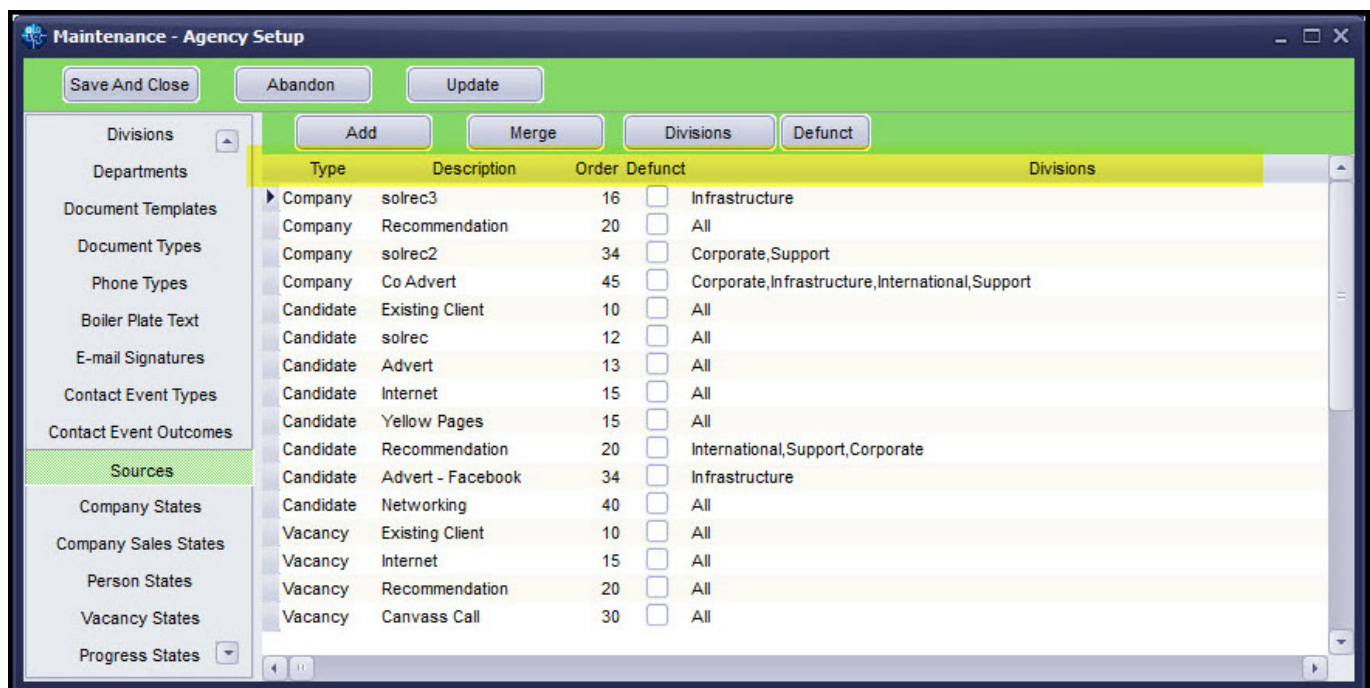
These pop ups will only work if General Settings – Switchable Fields – 1340 is set to 0.



The existing Temp Desk queries message on Temp Desk also now shows a count of Timesheet queries.

Setup Improved Source Functionality

In order to provide flexibility in naming sources for different record types (Company, Vacancy, Candidate) and providing the option to allocate sources to divisions Agency Setup – Sources have changed.



The function of sources within records has not changed.

The Reports and Validations which use vacancyclass will need amending to use the originid table.

Setup Single Sign On

It is now possible to log into IQX using Active Directory protocols. Provided a user has the required permissions and security setup clicking on the IQX icon will log the user straight in to IQX without having to complete the login box.

Where there is an error with the Active Directory setup the login will default to a standard login dialogue box.

To set up IQX to permit silent login enter the required domain information into General settings – Security settings 20 and 25.



17 Security Settings	One login only for directors except for...		
20 Security Settings	Domains allowed to connect	iqxtest	Semicolon separated list of full DNS domain names ie qxtest.l...
25 Security Settings	The domain group IQX users are in		

Active Directory setup will require System Administrator/IT department set up.

Mail Chimp Enhancements

Mailchimp have updated their API to v3.0 and from January 2017 v2.0 will not be supported by Mailchimp.

IQX has been updated to accommodate this change. Companies using Mailchimp should have received their new Mailchimp API from Mailchimp.

Setup Documents checked for size on addition

Compliance and other documents can have a maximum file size set to stop oversized files being saved to the database. The maximum file sizes (in Kb) can be set in General Settings - Settings 2050 and 2060. Blank or 0 gives no limit to the maximum file size.

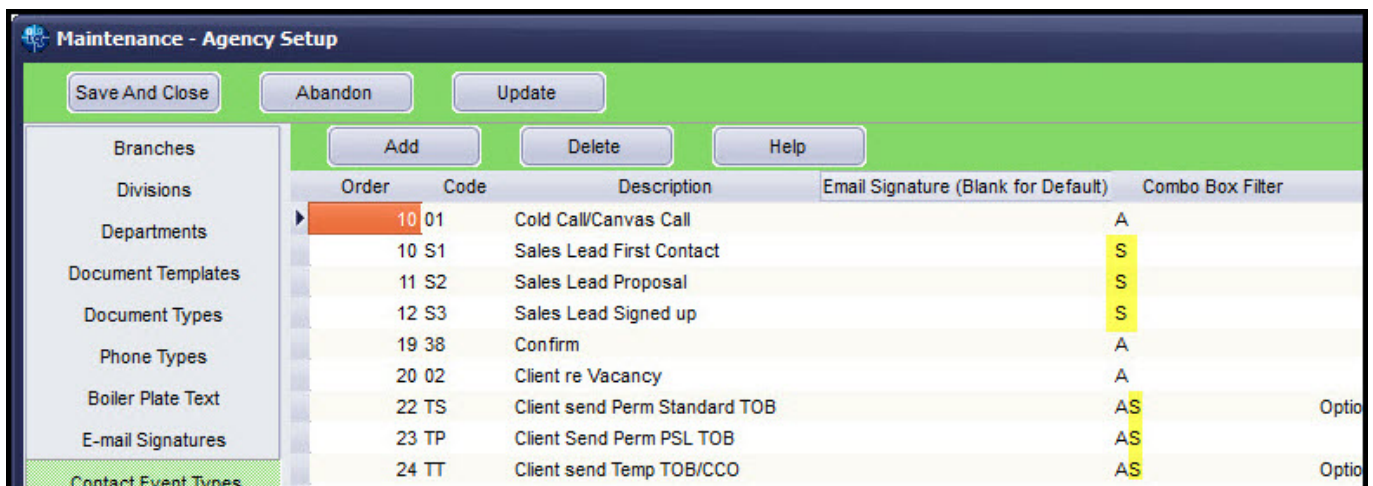
Note: Compliance documents and other documents are set separately.

If an overlarge file is loaded the import is stopped and a warning message appears.

Setup User Filter for Contact Events types

A User's view of contact events in a record can be filtered according to their own Contact event type or all.

In Maintenance - Agency Set Up - Contact Event Types enter the code(s) in the Combo Box Filter column.



Maintenance - Agency Setup					
Save And Close Abandon Update					
Add Delete Help					
	Order	Code	Description	Email Signature (Blank for Default)	Combo Box Filter
Branches	10	01	Cold Call/Canvas Call		A
Divisions	10	S1	Sales Lead First Contact		S
Departments	11	S2	Sales Lead Proposal		S
Document Templates	12	S3	Sales Lead Signed up		S
Document Types	19	38	Confirm		A
Phone Types	20	02	Client re Vacancy		A
Boiler Plate Text	22	TS	Client send Perm Standard TOB		AS
E-mail Signatures	23	TP	Client Send Perm PSL TOB		AS
Contact Event Types	24	TT	Client send Temp TOB/CCO		AS

The enter the relevant filter codes in the User record under Combo box filters.

Report Print Level	2000
Report Export Level	2000
Combo Box Filter	S
TS Query Code	A
Inbox Limit	60
Inbox Refresh Rate	15
Extension Number	

The filter is applied in a record by selecting yes in the Own Type drop down in Company, Company Contacts and Person Record View.

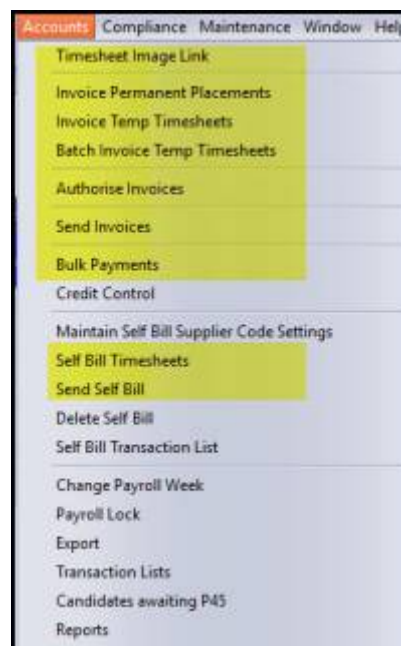
The filter will display those Contact Events matching the combo box type and Contact events without a combo box filter.

Accounts Colour

In preparation for a future feature (2017) Self Billing, we have added an option to differentiate between Self Billing and standard Accounts views.

General Settings - Colours - 510 and 520 form colours can be added.

In the image below the first block is controlled by Colours - 510 and the second by Colours - 520.





Support for DTKBarReader.dll unlimited licence

IQX has been updated to take advantage of the unlimited licence for the bar code reading dll – DTKBarReader.dll. This is useful for users of Job Runner.

From:
<https://iqxusers.co.uk/iqxhelp/> - **iqx**

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.16.12&rev=1481820968

Last update: **2017/11/16 22:07**

