



Release 2.16.12

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.

- [User](#)
- [System Administrator](#)
- [Fixes and Enhancements](#)

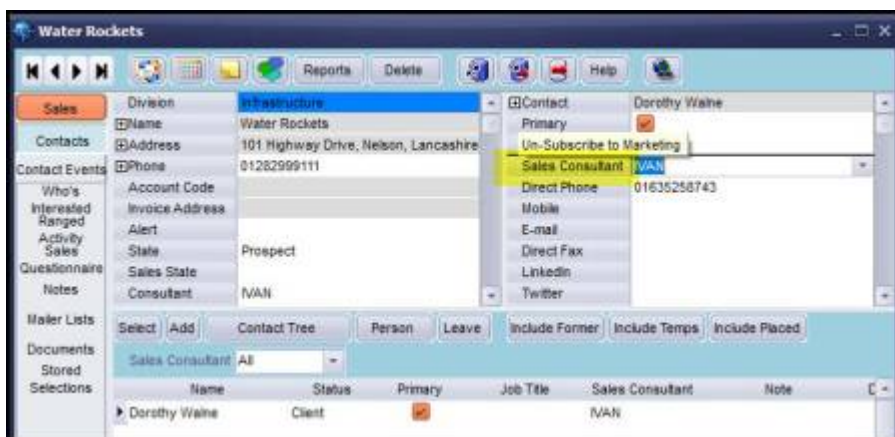
Users

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.

The screenshot shows the 'A & M Stephens' software interface. The left sidebar contains a list of menu items: Sales, Consultant (highlighted), Contacts, Contact Events, AWR, AWR Closures, Vacancies, Progress, Placements, Questionnaire, Notes, Extra Notes, Group Tree, A/c Setup, Accounts, and Docume. The main window displays the 'Consultant' record for 'A & M Stephens'. The 'Questionnaire' section is expanded, showing a list of questions and their answers. The questions include: 'Supply type' (Stationary), 'Old Account Code', '*** Company Q'aire ***', 'Sectors' (Construction), 'Client Terms' (Bespoke), 'Type of Recruitment' (No), 'Temps MUST have CS' (No), 'Placement No. Supply Limit' (56), and 'Max Hours Authorized for CS' (50). The 'Contact' section is also visible, showing fields for Primary, Un-Subscribe to M, Sales Consultant, Direct Phone, Mobile, E-mail, Direct Fax, Job Title, Department, Note, and Employed.

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.



The screenshot shows the iqx application interface. At the top, there are filters for Rank (All) and Rejection (All). Below these are buttons for 'Reject' and 'Candidate'. A table lists applications with columns: App. Time, Channel Name, ImportListed, Email Body, Rejection Reason, and Rejection Reason Date. A dropdown menu is open for the Rejection column, showing options: All, Imported, Rejected, and Neither. The table contains two rows: one for 'Broadbean Test Board' and another for 'Jobs Cabinet (Test Board)'.

App. Time	Channel Name	ImportListed	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

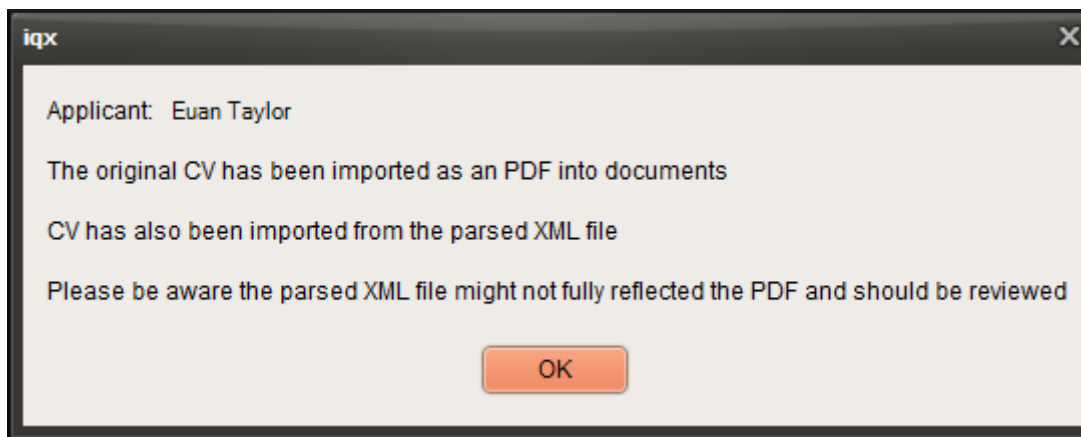
This requires System Administrator set up.

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.

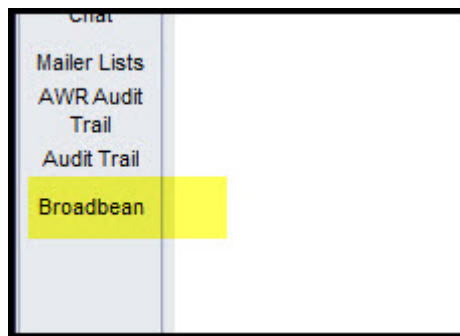
- When a pdf CV is imported into IQX the CV text is stored in Person - CV.
- The pdf CV is stored in Person - Documents with a title of Broadbean CV.

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.

The screenshot shows the 'Pop'pie Aco'sta' software interface. The 'Diary' tab is selected in the left sidebar. The main window displays a calendar view for the week of Monday 12/12/16 to Sunday 18/12/16. A dropdown menu is open over the calendar, showing options for availability: 'Available (whole days)', 'Available (part days)', 'Available (specify...)', 'Avail Day 07:00 -19:00', 'Avail Early 05:00 -14:00', 'Avail Late 12:00 -22:00', 'Avail No response -', 'Holiday (whole days)', 'Holiday (part days)', 'Holiday (specify...)', 'Unavailable (whole days)', 'Unavailable (part days)', and 'Unavailable (specify...)'. The 'Unavailable (part days)' option is highlighted in yellow. The calendar shows a 'Holiday' on Friday 16/12/16. The interface includes a top toolbar with buttons for Reports, Register, Delete, Search, and Help. The bottom of the interface shows a list of tabs for various functions: Temp, Contact Events, Get in Touch, Diary, Shifts, Shift Progress, Availability, Requirements, CV, Questionnaire, Notes, 2nd Notes, Web, Reference, History, Progress, Placements, AWR, Timesheets, Payroll, Payroll Address, STI Worker, Enq, Location Map, CIS (2007), Temp Desks, and Photo.



Pop'pie Aco'sta

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

Temp	Division	Infrastructure	Headline	
Contact Events	Name	Pop'pie Aco'sta	Alert	
Get in Touch	State	Current	Reg. Departments	
Diary	Available From	07/12/2016	Dept. Questionnaire	
Shifts	Personal	Female 54	HP Source	
Shift Progress	Home Phone		***Person Q'aire***	
Availability	Day Phone	01635000012	Location Zone	Any Area
Requirements	Mobile	07000965356	Emergency Contact	
CV	E-mail	Poppie_Acosta@iqx.co.uk	Driving Licence	Full, Clean
Questionnaire	Social Media		Languages	
Notes	Address	321 Newb'old Place, Wellesbourne,	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

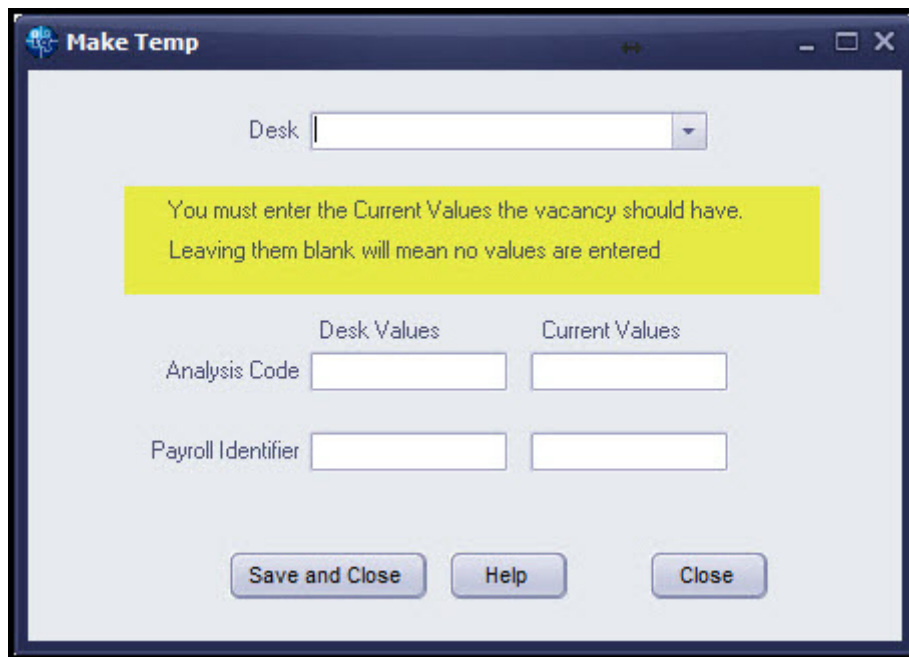
Extra Notes Client is involved in all sections of commerce

Group Tree Preferred band A staff

A/c Setup

Improved details when making a Vacancy Perm to Temp

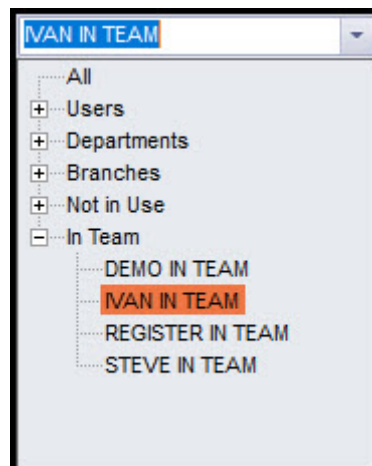
When converting a vacancy from permanent to temporary a warning to enter Current Values for the Vacancy has been added. This informs users that Leaving the Make Temp values blank will result in no values being entered.



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

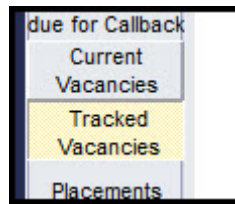
In Desk Top, consultants can have their default view set to their Vacancy Team instead of their consultant view.



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.

	Date	From	To	Our Ref.	Candidate	State	Description	Reference	Re
Shift Progress	21/11/2016	08:00		15336	Pop'pie Aco'sta	Awaits Contact	Day		
AWR	21/11/2016	08:00		15336	Will Barr	Awaits Contact	Day		
Questionnaire	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

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

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

Site Details

	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			
	Sat 19/11/16	08:00	17:30	60		Day -	17917			
Location Map	Sat 19/11/16	08:00	17:30	60		Day -	17918			
Shift Templates	Fri 18/11/16	08:00	17:30	60	Inaya Buchanan	Day -	17916			
	Fri 18/11/16	08:00	17:30	60		Day -	17915			
Vacancy Limits	Thu 17/11/16	08:00	17:30	60		Day -	17913			
Documents	Thu 17/11/16	08:00	17:30	60		Day -	17914			
Cascade Rules	Wed 16/11/16	08:00	17:30	60		Day -	17912			
Cascaded	Wed 16/11/16	08:00	17:30	60		Day -	17911			
Shifts	Tue 15/11/16	08:15	17:30	60		Day -	17910			
Cascade	Tue 15/11/16	08:00	17:30	59		Day -	17909			
History	Mon 14/11/16	08:00	17:30	60		Day -	17907			
Vacancy Roles	Mon 14/11/16	08:00	16:00	60		Day -	17908			
Sec Agency										
Rates										
Compliance										
Questionnaire										
Modify Screen										
Appointm...										

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



2026/09/22 03:31

11/24

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

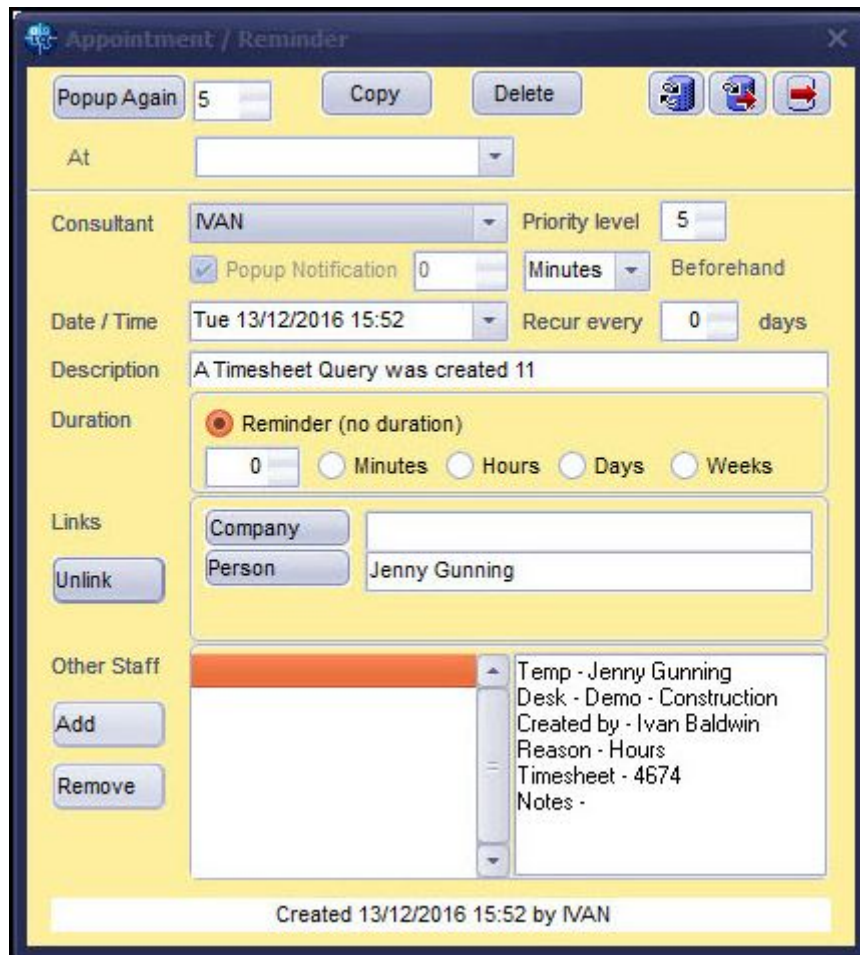
Previously used employees highlighted

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. At the top, there are buttons for 'Popup Again', 'Copy', and 'Delete'. Below these are input fields for 'At' (a dropdown), 'Consultant' (a dropdown set to 'IVAN'), 'Priority level' (a dropdown set to '5'), 'Date / Time' (a dropdown set to 'Tue 13/12/2016 15:52'), and 'Recur every' (a dropdown set to '0 days'). There is a checkbox for 'Popup Notification' which is checked. The 'Description' field contains the text 'A Timesheet Query was created 11'. The 'Duration' section has a radio button selected for 'Reminder (no duration)' and other options for 'Minutes', 'Hours', 'Days', and 'Weeks'. The 'Links' section has buttons for 'Company' and 'Person', with 'Jenny Gunning' entered in the 'Person' field. The 'Other Staff' section has 'Add' and 'Remove' buttons. At the bottom, there is a status bar that says '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 dialog 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.

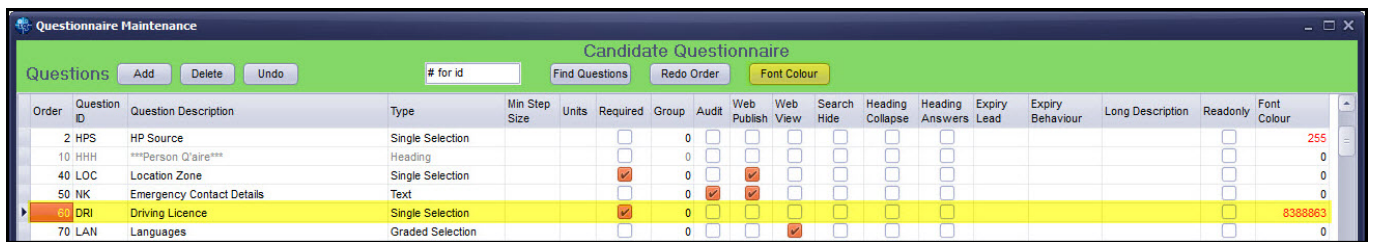
Colour Enhancements to Questionnaires for readability

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.

The screenshot shows a web interface for managing questionnaires. At the top, there are three buttons: 'Find Questions', 'Redo Order', and 'Font Colour'. Below these is a table with two columns: 'Long Description' and 'Font Colour'. The 'Font Colour' column has a yellow header and contains the number '0' in each row. The table is currently empty of data rows.

Long Description	Font Colour
	0
	0
	0
	0
	0
	0

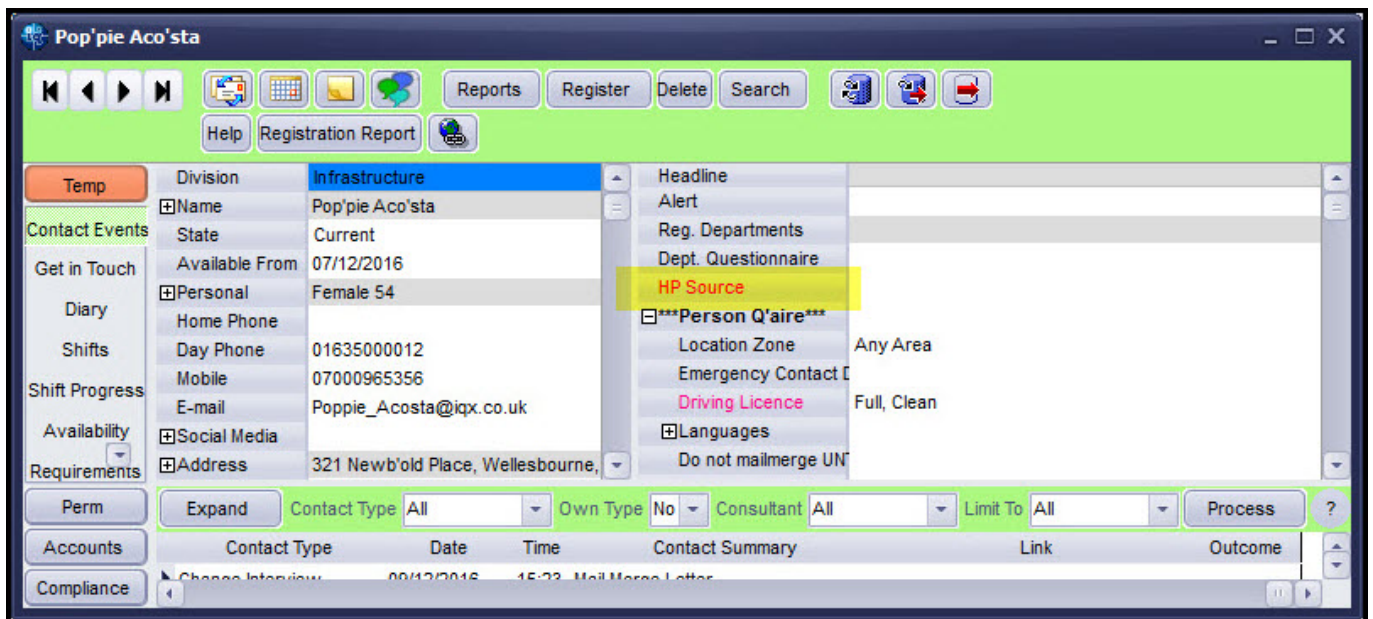


Questionnaire Maintenance

Candidate Questionnaire

Questions Add Delete Undo # for id Find Questions Redo Order Font Colour

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



Pop'pie Aco'sta

Reports Register Delete Search Help Registration Report

Temp Division Infrastructure

Contact Events

Get in Touch

Diary

Shifts

Shift Progress

Availability

Requirements

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

Accounts

Compliance

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

Change Interview 00/12/2016 15:23 Mail Merge Letter

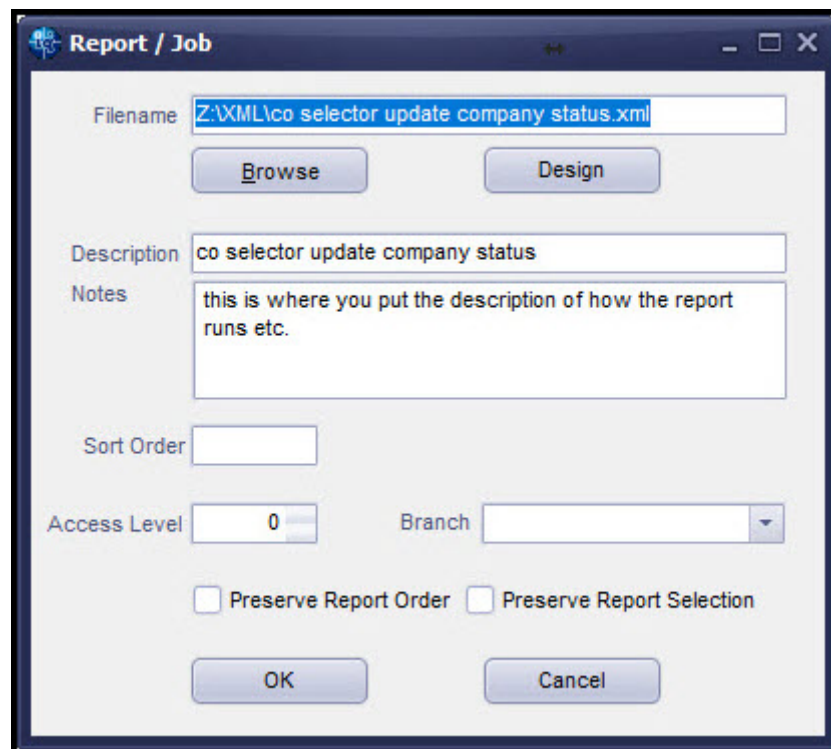
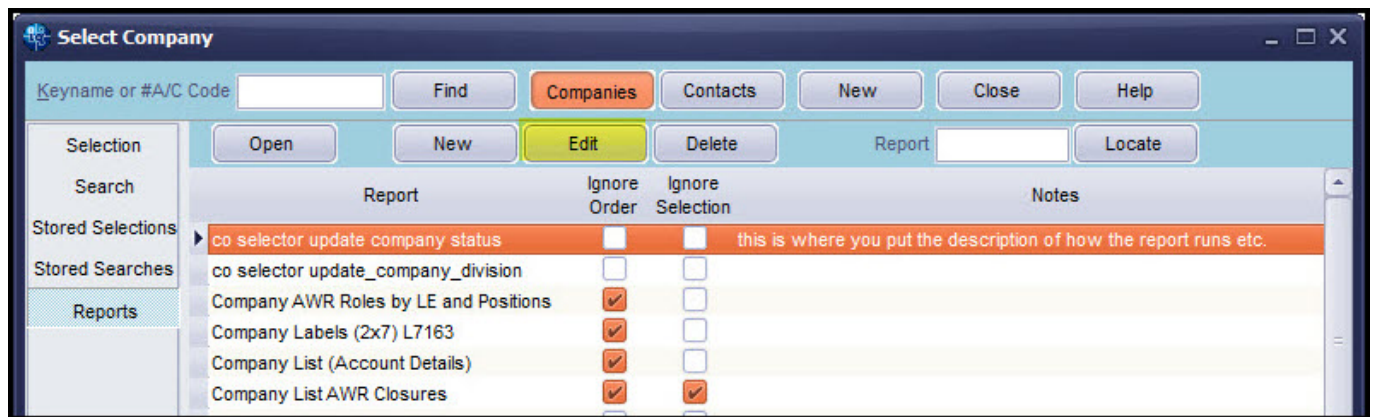
Reports can be restricted to highlighted data

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.



Ivan Baldwin

Save and Close Abandon Update No Password Delete Help Reports

Roles	Name	Ivan Baldwin	Nominal Segment (main
Layout Settings	Keyname	BALDWIN IVAN	Report View Level 2000
Questionnaire	Login Name	IVAN	Report Print Level 2000
Division Access	Job Title	Consultant	Report Export Level 2000
Department	E-Mail Address	IVAN.BALDWIN@IQX.CO.UK	Combo Box Filter S
Maintenance	Short ID	IB	TS Query Code A
Popup Escalations	Template for New Users	☒	Inbox Limit 60
Broadbean	Not In Use	☐	Inbox Refresh Rate 15
Audit Trail	Role Group	All	
Own Audit Trail			

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.

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.

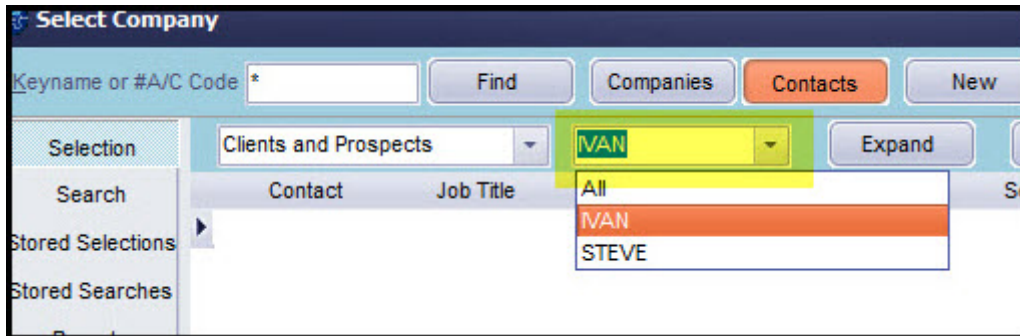
The role can be added in Maintenance - Users.

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

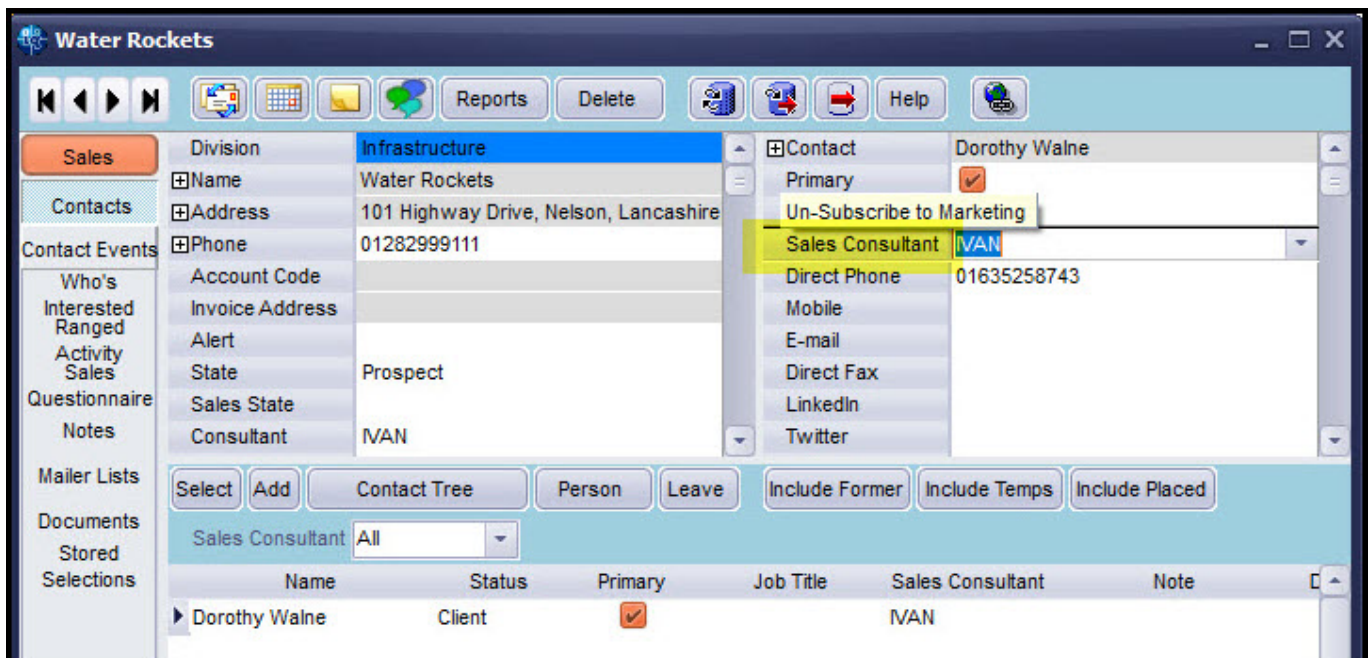


111 Terminology	Sales Staff Name	Sales Consultant
112 Terminology	Sales Staff Plural Name	Sales Consultants

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.

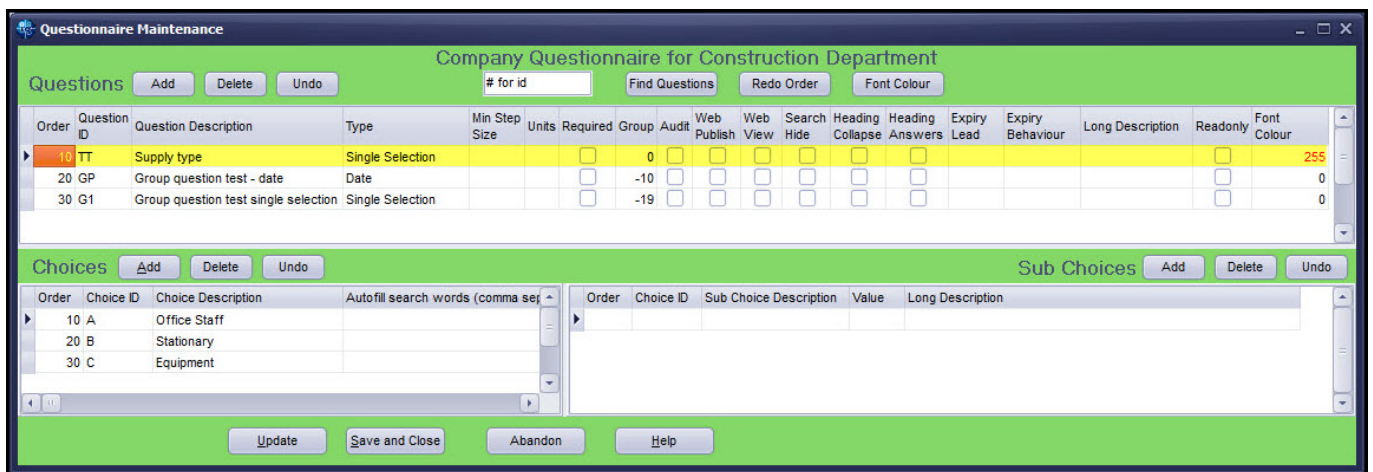
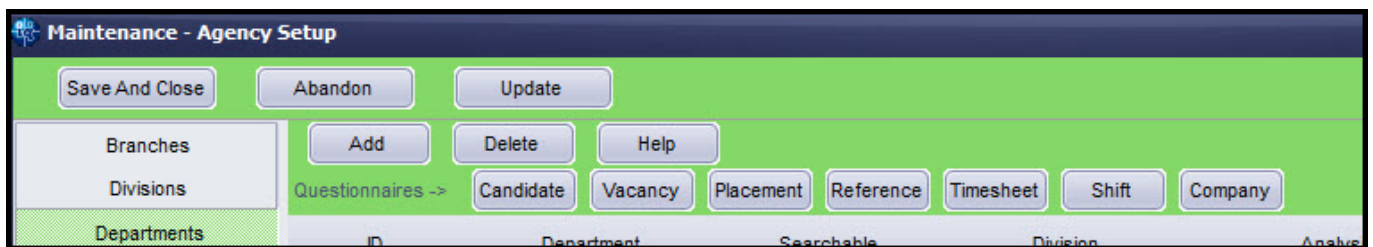


Setup Company Departmental Questions

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.

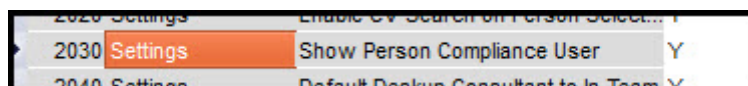
This is set up via Agency Setup - Departments - Select Department - Companies Button.



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.

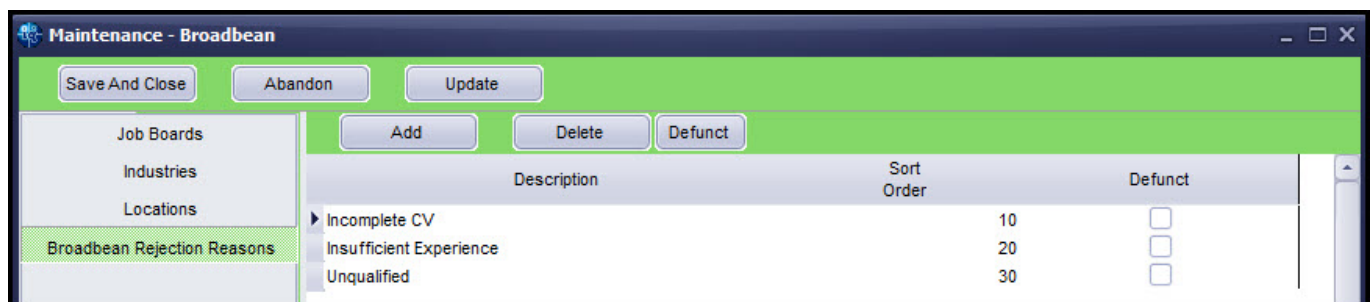
Setup Broadbean Users in bulk

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 amend the colour of Memo Type items in the Outlook bar in a record. E.g. Notes, Extra Notes.



ABBA Ltd

Sales Consultant

Division: Infrastructure

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 Consultant

Division: Infrastructure

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

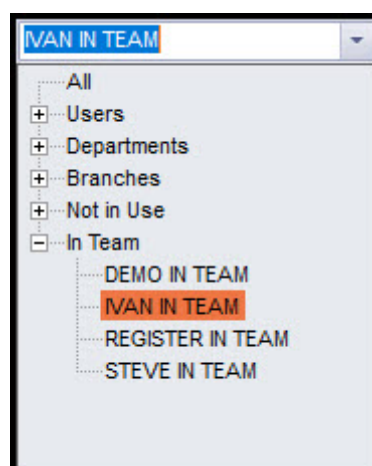
Group Tree: Preferred band A staff

A/c Setup:

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.



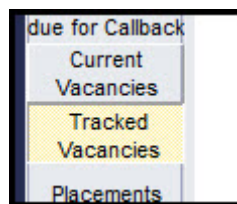


This is set up by setting General Settings – Settings 2040 – Default Deskup Consultant to In-Team – Y. Settings 1450 – Allow Vacancy Team must also be set to Y.



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.



Type	Description	Order	Defunct	Divisions
Company	solrec3	16	☐	Infrastructure
Company	Recommendation	20	☐	All
Company	solrec2	34	☐	Corporate,Support
Company	Co Advert	45	☐	Corporate,Infrastructure,International,Support
Candidate	Existing Client	10	☐	All
Candidate	solrec	12	☐	All
Candidate	Advert	13	☐	All
Candidate	Internet	15	☐	All
Candidate	Yellow Pages	15	☐	All
Candidate	Recommendation	20	☐	International,Support,Corporate
Candidate	Advert - Facebook	34	☐	Infrastructure
Candidate	Networking	40	☐	All
Vacancy	Existing Client	10	☐	All
Vacancy	Internet	15	☐	All
Vacancy	Recommendation	20	☐	All
Vacancy	Canvass Call	30	☐	All

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 dialog 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
25 Security Settings	The domain group IQX users are in	Semicolon separated list of full DNS domain names ie iqxtest.l...

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 and not using 2.16.12 should contact IQX support for assistance.



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.

The screenshot shows the 'Maintenance - Agency Setup' window. On the left is a sidebar with a tree view containing: Branches, Divisions, Departments, Document Templates, Document Types, Phone Types, Boiler Plate Text, E-mail Signatures, and Contact Event Types (which is highlighted). The main area contains a table with the following columns: Order, Code, Description, Email Signature (Blank for Default), and Combo Box Filter. The table lists several contact event types, with the first one selected. The 'Combo Box Filter' column contains codes like 'A', 'S', 'AS', and 'AS'.

Order	Code	Description	Email Signature (Blank for Default)	Combo Box Filter
10	01	Cold Call/Canvas Call		A
	10 S1	Sales Lead First Contact		S
	11 S2	Sales Lead Proposal		S
	12 S3	Sales Lead Signed up		S
	19 38	Confirm		A
	20 02	Client re Vacancy		A
	22 TS	Client send Perm Standard TOB		AS
	23 TP	Client Send Perm PSL TOB		AS
	24 TT	Client send Temp TOB/CCO		AS

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

The screenshot shows a user record form with the following fields and values:

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=1516202900

Last update: **2018/01/17 15:28**

