

Under development

Release 2.18.11

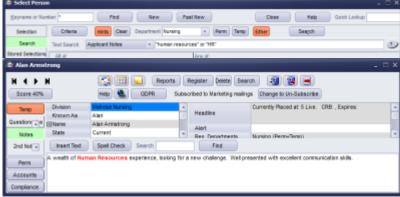
If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

- Features
- Enhancements
- System Administrator
- Fixes

FEATURES

Person|Notes can now be indexed searched.

It is now possible to carry out a boolean search within the notes view of a candidate record, the matching word is coloured red on the returned records. Consultants can switch between searching in the CV Text and the Notes section.



This search is also available when adding requirements to a vacancy and searching for candidates for a vacancy.





2/9

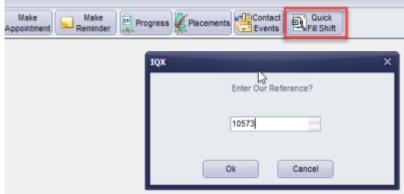
2024/05/28 03:55

🖨 Temp Vaca	ancy: HCA for Aichemy Partners LLP	- = ×
***	🔀 🗔 🖬 Repris Search Daleis Meis 🗿 🖉 🖶 💷 Drasteer 🐡	
Contact Events	Company Authenty Partners LLP * HCA 1 job details Contact Sonny Llayd	
Short List Requirements	Job Title HR Admin No. of Posts 1	
Rates	PIO - SIC Order M HCA14A	
Dery Shifts	Citera Hats Clear Tool Search Applicant Notes - Human Resources	2
Shit Progress		
ANR	Grade/Banding 2002	-
Questionnaire Web		

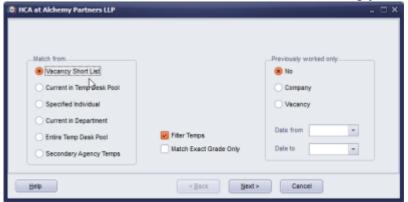
This is extremely useful for Agencies who use the notes fields for general information not covered by the questionnaire.

Quick Fill Shifts Button.

If set up by your system administrator a new button will be visible on the button bar which will allow you to search for shifts by reference/serial number.



If the shift is unfilled the shift filler will launch allowing you to fill the shift.



If this feature would assist you please speak to your System Administrator.

Placements now visible for Sales Consultant Role.

Users with the Sales Consultant role now have an additional view on the left hand side for Placements.



Sales	Division		Lifesteal No.	nang		-	ElContact						
	Name		IQX.				Primary						C
Contacts	⊞Address		Wester Newl	house, Lillesleaf, S	cottish Borders, T	5	Un-Subscribe						
A REAL PROPERTY.							Sales Consult	ant					
11110/10	ESocial Media						Direct Phone						
Interested	Account Col		524 (Invoice)				Mobile						
anged Activity		855	Wester Newl	house, Lillesleaf, S	cottish Borders TI	0	E-meil						
Sales	Alert						Direct Fax						
Notes/V	State		Client				Job Title						
NOTES	Sales State					٠	Department N	EW					
Mailer Lists	Expand		Applicant	Process	Count		Current Temp only	Process	Тапра	f iter			
Documents	Consultant		Contact	Applicant	Job Title	1	emp From	То	Pay	Charge	Margin	Ouri	R)
Stared Selections	SHELLEY	Viele	a Scet	Justin Galbraith	BB Test		03/04/2018		10.0	0 20.00	43.60 %	3608	
Vacancies	SHELLEY	Barb	tara Kirkup	Clark Bevin	HCA2		05/09/2016	64/12/2016	15.0	0 20.00	25.00 %	3525	
vacancies	SHELLEY	Darb	bara Kirkup	Donna Fray	HCA2		05/05/2016	03/12/2010	15.0	0 20.00	25.00 %	3524	
Placementa													
- 10													

This view lists the placements and each one can be expanded to assist the Sales Consultant when making their business development calls.

Ability to add a Reminder when Adding Withhold.

When entering a withhold it is now possible to add a reminder at the same time, useful if you want to review the withhold after a period of time.

Consultants should use the green reminder button to the right of the screen with the withhold selected and the links to the company and contact will be made.

			Appointment / Reminder	×
H 4 F H	S 🖽 도	Reports Delete	Calata 🧃 😫 🖷	
Sales	Division	Litiesleaf Nursing		
	Name	ICX.		E
Consultant	⊞Address	Wester Newhouse, Lille		
Contacts	EPhone		Consultant SHELLEY • Priority Invel	
Contact Events	ElSocial Media		Popup Netification 0 Minutes - Beforehand	
Contact Events	Account Code	524 (Invoice)		
AWR	Invoice Address	Wester Newhouse, Lille	Date / Time Sun 09/12/2018 21:22 Recur every days	
AWR Closures	Alert		Description IOX, Viola Scott Shelley Hunter	
	State	Client	Duration 🛞 Reminder (no duration)	
Vacancies	Sales State		A LIGHT ON AN AND AN AND AN	•
Progress	Add to Note	Expand Applicant	Minutes Hours Days Weeks	
Placements	Applica	ant Registratio	Links Company XXX, Vola Scott	
Withholds	Shelley Hunter	19613	Unink Person Shaley Hunter	
Questionnaire				
NotesV			Other Staff	
Extra Notes			Add	
Group Tree				
Miscelaneous			Remove	
Accounts			*	
Decumenta				
Temp Details	4 0			

Bulk CV import now accepts PDFs.

When using the bulk CV import functionality it is now possible to bulk import CVs in a PDF format. The process is the same as for Word CVs. It should be noted that the readable text will be added to the CV and the file will be added to documents but the CV will still need to be written and formatted.

Source available as a field on Bulk CV Import.

When users are doing a Bulk CV Import source is now available as a field to complete.



Bulk CV Import	t –	□ X
Import		
State	Pre registration	
Division	Melrose Nursing	
Consultant	SHELLEY	~
Department	Nursing	<u> </u>
Permanent		
Temp		
Source		-
		_

This is particularly useful and time saving for consultants who are importing CVs following a marketing campaign.

Amendments to Broadbean when adding new candidates.

When importing a new candidate from a Broadbean application to IQX it is now possible to highlight fields and right click to select which field you wish to complete (the same process as when adding a candidate from a CV).

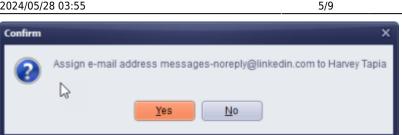
Once the wizard has been completed the Person form will open so that consultants can complete the questionnaire ensuring information can be completed at an early stage for faster future searching.

Ability to drag link a record to an unlinked email in the IQX Inbox.

When an email which has no link to an IQX record is opened you can now drag either a person from the person selector or a company contact from the company record onto the 'IQX Contact' field in the top section and it will offer to save the email address to the dragged record and make the link.

1	👌 E-mail Messa			
Γ	ĸ	(4 	Clo	se
	From Li	nkedin Notifications	E-mailAddress messages-n	oreply@linkedin.com
	IQX Contact	ag Applicant or Contact recor	d here to link e-mail address	Expand
Ľ	Subject St	helley, see what's new on Lini	kedin Receive	ed 08/12/2018 02:30
	in		Shelley H	Hunter 🕕
	Select Pers	on		
	Keyname or N	umber T	Find New	Fast New
	Selection	Current Applicants Only	+ Expand Count	Update Filter
	Search	Name	State Last Contac	ct Division
	Stored Selection	Lilah Tanner Harvey Tapia	Current 26/07/2016 Current	IQXHealthcare Melrose Nursing



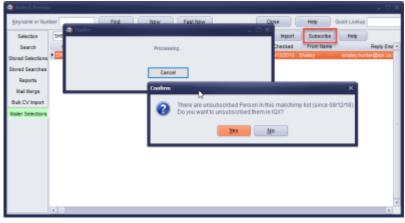


There is text in the box when no contact exists which explains this.

Managing MailChimp Unsubscribers.

When a recipient unsubscribes from a Mail Chimp mailer it is now possible to pull this information back in to IQX.

On the Mailer Selections view consultants can press the subscribe button for each list and a message will appear informing the consultant how many people have unsubscribed on that list and giving them the option to update the persons marketing status in IQX. Details of which individuals have subscribed can be found in Mail Chimp.



Linked Contact can be made from an open provisional or completed timesheet.

Context sensitive Make contact, Make appointment and make reminder buttons will work fully with timesheets and provisional timesheets.

🜒 vr201.0/11	Tin heet for:	Simon Por	or as HCA Band 1	Eat ASC Cont	rack Services Welfer	4			- 🗆 X	
Shifts up to	1706/2018				Add Shifts Dele	s Shift Care	el Shift			
Our Ref.	Date	from T	Dreak Hours	Pay Bill Gr	nede AWR? Ltd? The		Shift Type	Client Note	- 1	
10544	Wed 13/96/2018	06:00 14:	00 60 7.00	💌 💌 A	N N		6		SH I	ument Show Hours
10567	Thu 1406/2018 PH 15/06/2018			ent Simon Po	nce Placement as H	A land 2 for A	BC Contrac	t Services Wat	tland	
10569	Sat 16/06/2018 San 17/06/2018				Reporta C	lainta 🛛 Haip			New Vacance	7
			Text	Person	Simon Pance			- ClSimon		
			Questionnaire	Company Vacancy	ABC Contract Service HEA Band 2	Wattord, likelod	y Jones	Mobile E-mail	07700 0 Simon_1	Pance@loxdemo.cs.uk
			EmelLog	Placement	Temp 11/06/2018 to 12	05/2918		Home E-m	al Siton	Pance @icxdemo.ca.uk
				Hade By	SHELLEY			Melody		
				Date	09/12/2010			ABC Contra	ct Ser-	
				Time	21:52					

Users simply need to have the timesheet or the provisional timesheet open and use their preferred method for making a contact event, appointment or reminder.

Timesheet Dispatch Improvements.

It is now possible to clear timesheet dispatch details by Client Code to enable consultants to clear

Under development



2024/05/28 03:55

details in bulk rather than individually if they need to re-dispatch for a particular client.

Dispatch Date	Dispatch Method		_
09/12/2018 09/12/2018		Clear Dispatch Details Clear ALL Dispatch De Clear Dispatcher Deta	etails

Shift Description added to provisional timesheet.

When completing a provisional timesheet the Shift view shows the shift Description.

_		Timesheet for	Senen	Pomor	10.00	A Band	2414	R G		1 Service	_	dived							. = ×
	Dur Ref.	Chefe	From	70	Break (Nitra)	Hears	Per		0.00	e AND L		Teres.	(Can	Shift Shift Type	Cient Note	Consultant	Order Feasors	Description	
1	10547	Viel 13/06/2011 The 14/06/2011 Pri 15/06/2010	96.00	14:30	60	7.90 T.00	8 8 8	8 8 8	A A A	N N N N				ţ		SHELLEY SHELLEY DHELLEY		Barly Day Early Day Barly Day	
Ŀ.	10549	5at 10/6/2010 5at 17/06/2010					8	8	Â	N N				E E		SHELLEY		Early Day Early Day	
					1994	38.30													-
Com	nent																		
		inte Seve Pr	ovisiona	6 04	ete Da	wy.						per l	ijed >	- Cer	io#				

Invoicing now accepts jpg timesheet Images.

When linking images to timesheet jpg file type is now supported.

Invoices won't be created if no Access to Folders.

Access to invoice and timesheet image folders is now checked before authorisation takes place and if a connection cannot be established invoices are not created and an error message is produced.

Adding records to other users stored selection.

Users with Manager role can now add records to another users Stored Selection.

Skype.

IQX can integrate with Skype, please contact IQX Support to discuss further.

Enhancements

Streamlining of Mail Merge Process.

When the Mail Merge process is followed the Letter Signatory and Selected and Marketing options now appear on the same window streamlining the process and enabling the user to reach the mail



merge more quickly.

_ 🗆 X
-
Marketing
Subscribed
O Un-Subscribed
OK Cancel

Anonymisation Improvements.

When carrying out anonymisation under the GDPR processes a new warning message appears advising that candidates should not be anonymised if they have worked for you recently and you should check documents and notes for personal details for enhanced visibility. The IQXNet user record is also cleared when record is anonymised.

IQX ×
Do NOT anonymise if they have worked for you recently. You and your clients require to be able to identify them. Before Anonymising you must inspect Documents and Notes for personal details
ОК

Extra text on the Apply button has been added with the aim of preventing anonymising records too soon 'Have you checked that placements are finished and there is no future work booked?Have you checked all Notes, and documents to ensure there are no personal details in them?'.

Nominal Code Segments - Defunct codes hidden by default.

Defunct nominal codes are hidden by default with a drop down menu to view defunct codes if required.

Shift Template settings enforced when adding shifts at timesheet stage.

When 'Template Required for Shifts Added on Timesheets' the shift template settings are now fully enforced.

Shift Description added to provisional timesheet.

When completing a provisional timesheet the Shift view shows the shift Description.



Under development

ifts up to	17/06/2018							A	dd Shifts		Delete Shift	Canc	el Shift					
Our Ref.	Date	From	То	Break (Mins)	Hours	Pay	Bill	Grade	AWR? L	td?	Their Ref.	Note	Shift Type	Client Note	Consultant	Order Reason	Description	
10566 10567 10568	Wed 13/06/201 Thu 14/06/201 Fri 15/06/201	18 06:00	14:00	60	7.00 7.00 7.00		 V V 		N N N N				E E F		SHELLEY SHELLEY SHELLEY		Early Day Early Day Early Day	
10569 10570	Sat 16/06/20 Sun 17/06/20	18 06:00	14:00	60	7.00 7.00	~		А	N N N N				E		SHELLEY SHELLEY		Early Day Early Day Early Day	
				Total	35.00													
nment																		

When adding an extra Payband to a provisional timesheet you can now select a shift to link it to.

Allocates a date to a payband on a provisional timesheet **IF** Temp Desk set to show shift dates.

Loading shift viewer from ALT + F8.

The shift viewer now loads quicker using Alt+F8 or from the Select Menu. If a shift cannot be found a message now appears advising of this.

WhenCreated added to Staff table.

The WhenCreated date and time will show for NEW consultants in top left section of the User record.

Additions to Timesheets.

The Our Ref has been added to the shifts section of a completed timesheet and Reference has been renamed to Their Ref.

Database Function Names.

Database Functions are now labelled with the underlying function name in addition to the visible name.

Warning message if timesheet image slow to load.

When adding a timesheet image to a timesheet in IQX if it is a large file and is slow to load you will now receive a message advising you of this.



Under development

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

Permanent link: https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.18.10



Last update: 2019/11/22 19:45