Release 2.23.40

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

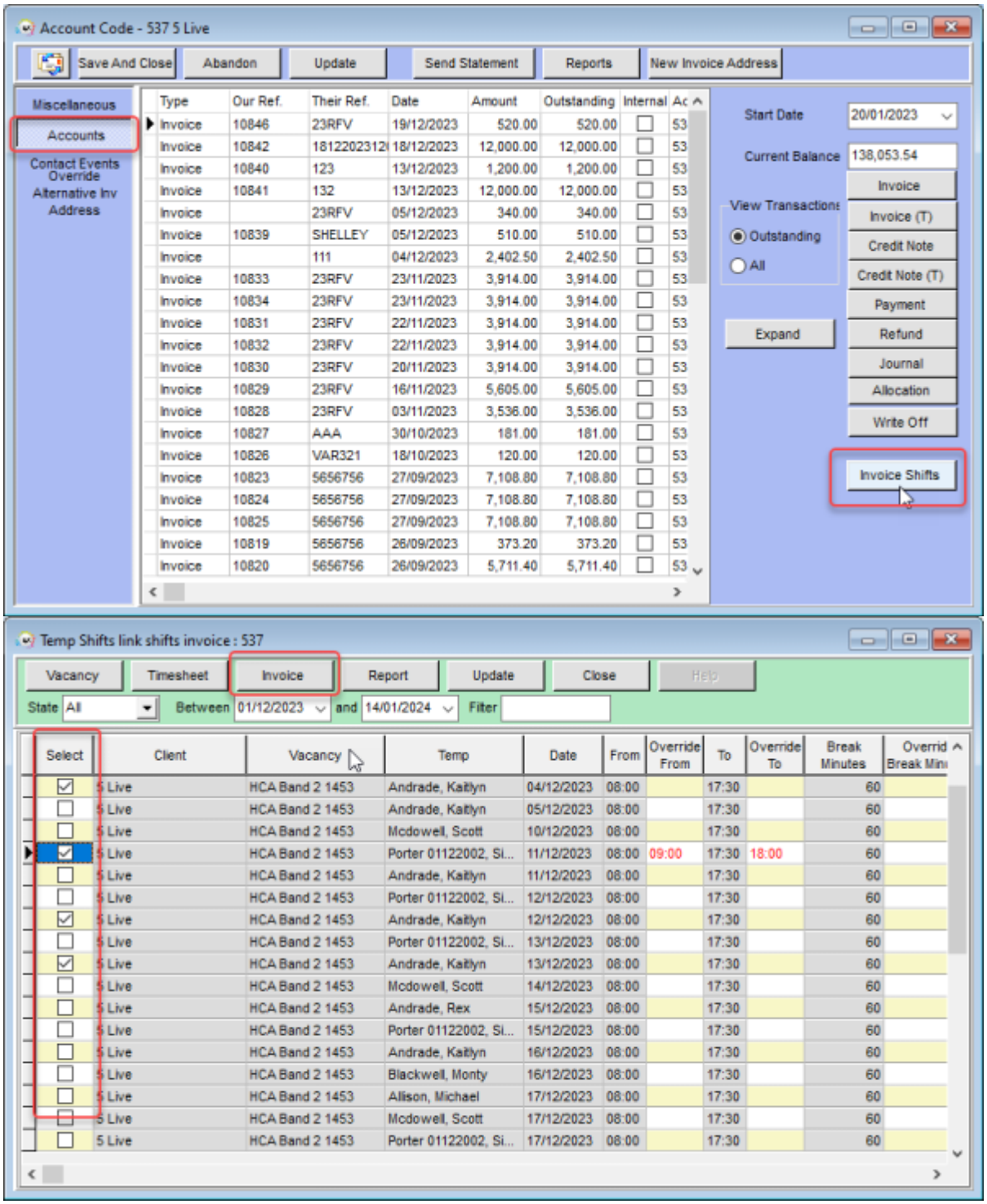
Process for managing shifts for clients who are Self Bill/Managed through Portals

Issue: The client will send a list of shifts to be invoiced, and will pay only an invoice that matches. The list could exclude a single shift on a timesheet that covers multiple shifts, or could have modified times. Invoice does not need to list each shift so need not be created from Timesheet.

Solution: where client is ticked for ‘Managed by Portal’ to allow from the Accounts view an option to see a list of shifts, add refs and modify times for later comparison with original, select them as being included on client invoice, and then create an Ad Hoc invoice that will exactly match the total of the client invoice/self bill. That will mark the shift as having been linked to an invoice by saving the Ad Hoc Invoice documentID in the table.

Ability to report on shifts that appear to have escaped the invoicing process.

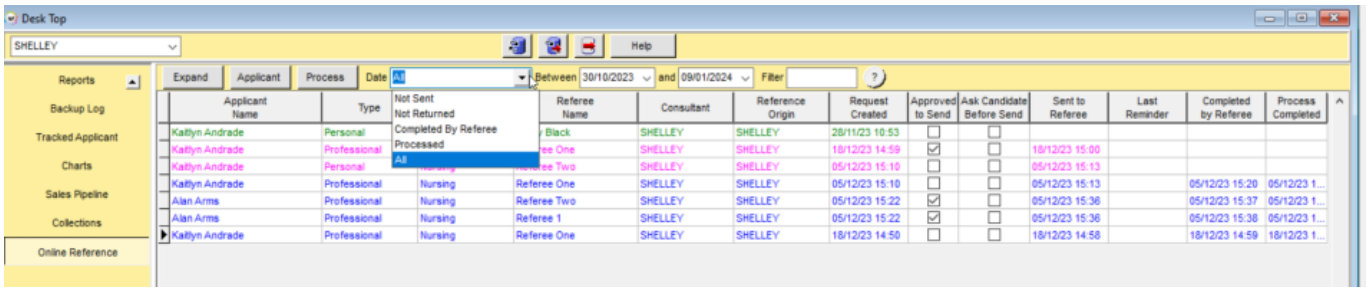
Ability to report on overwritten times and breaks to follow up corrective action with client.



For further information please contact IQX Support.

Improvements to References on Desktop

To enable users to keep on top of the online references for candidates a new view has been added on the Desktop for monitoring online references. Users can filter on state and date to quickly identify what stage references are at.



Automatically answering questions to update Compliance Score when document is signed

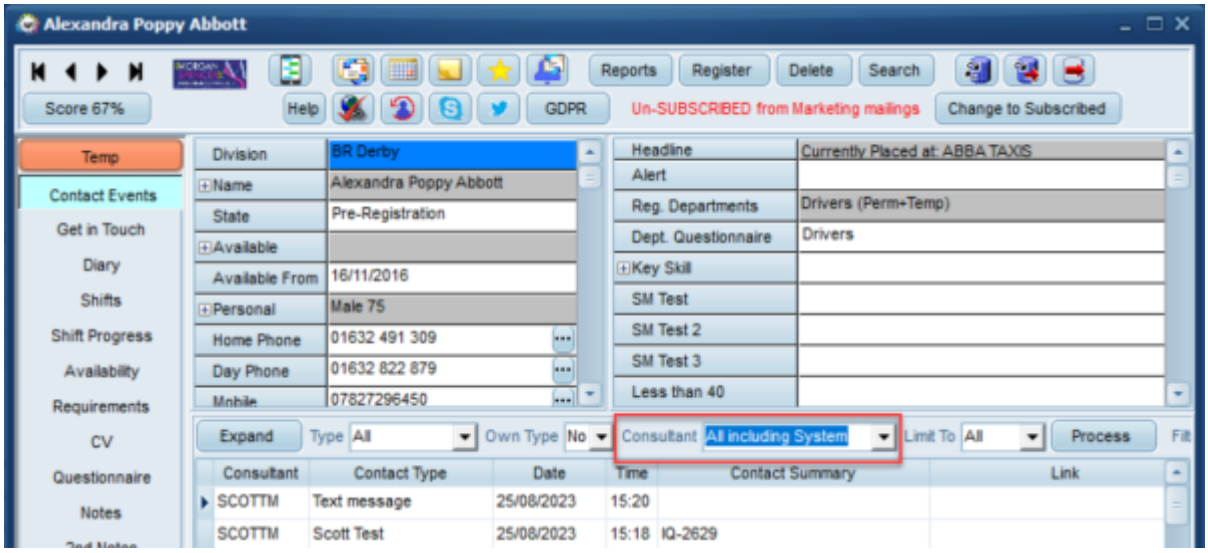
Only questions can be included in the Compliance Score so to provide visibility over compliance documents when a document has been checked and is signed to say it ok a date question can be automatically answered to update the Compliance Score.

This feature will require your System Administrator to update a new function called Compliance Document Signed, please contact IQX Support for assistance with this.

ENHANCEMENTS

Contact events - make "all including system" filter default switchable

The Contact Event Consultant drop down filter now defaults to ‘All Including System’ rather than ‘All Excluding System’.



This can be reverted back if needed, if this needs to be done please speak to your System Administrator.

Ad Hoc invoices/Credits - give the user the option of choosing another template

When creating Adhoc invoices you now have the ability to select the invoice template you want to use with it. There is now a dropdown field that allows you to select the template. If there is an invoice override template set this will populate the dropdown as default but can be changed.

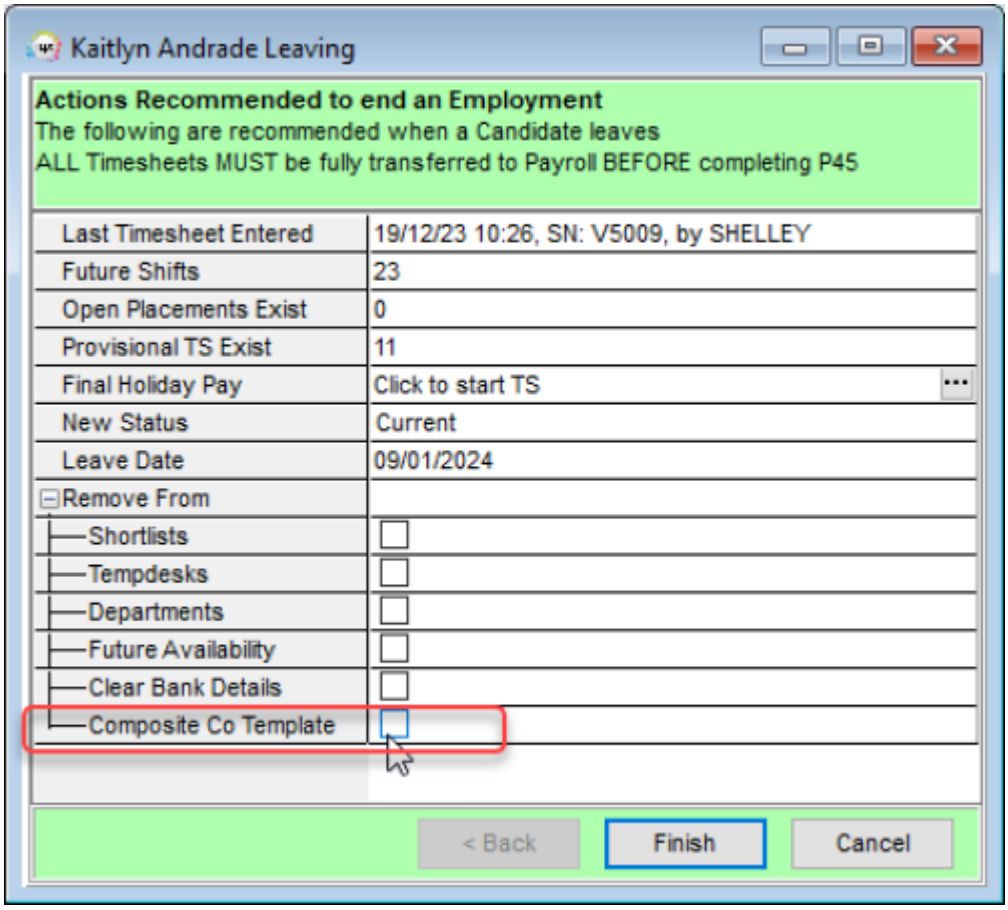
Bank Holidays per Region

Ability to set holiday by Region i.e. Scotland/England.

This can be set up within the Client record > Temp Details > Temp Holiday Code > enter code that is applicable to region.

P45 options - Remove Composite Company Template

It is now possible when P45ing a candidate to clear the composite company details in addition to bank details.



Saving files from IQXanywhere - offer default filename

In IQXanywhere when saving a Document the caption of the form (which is the owner name plus the

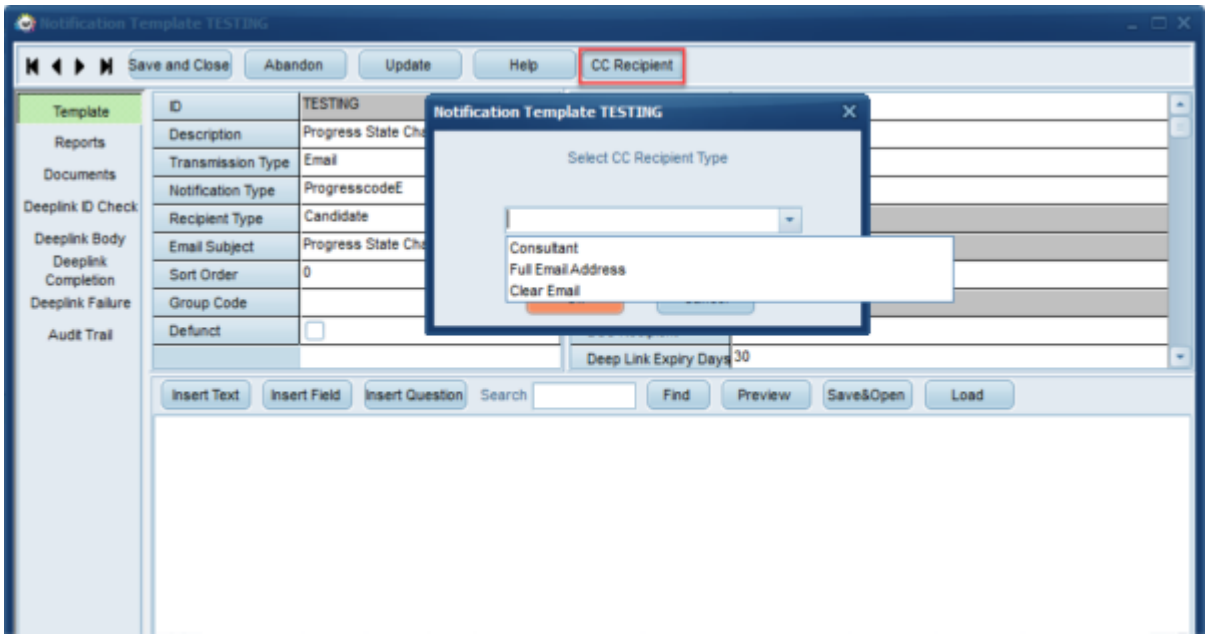
document description) will be offered as the filename instead of a blank.

Role to limit access to Unsubscribe to Marketing button

New User Layout setting has been added that will allow you to limit who has access to the 'Subscribe/Unsubscribe from Marketing' button. The default is that all users have access to this. In order to disable access for users a System Administrator will need to apply the new layout setting.

Notification Enhancements

CC in the Consultant or Researcher, etc. You can now add a CC recipient in to a Notification Template in order for them to always receive this when that template is selected. This is particularly useful if you want to CC in the consultant, and you can also enter an email address manually. Note that additional cc recipient fields for Compliance and Resourcer are available for Person and App notifications.



For more information or assistance with setting this up, please contact IQX Support.

Same notification template applying to multiple progress states. A new notification type of ProgressCode has been created so that users can select multiple different progress states and send them a generic message. This is useful if you internally differentiate between progress states for reporting but in essence they are the same thing to candidates.

Vacancy Shifts - Secondary Agency name

We have added the secondary Agency Name in brackets after the candidate name in the Vacancy Shifts view on the Temp Desk to make it obvious at a glance which clients are Secondary Agency.

Temp Desk Vacancies view colour in cell for identifying if Candidate confirmed on web.

If set up when a candidate confirms a shift through iqxWEB the background of the cell can be coloured to show on the Temp Desk when a Candidate had confirmed through IQXWeb.

Requires to be set up by System Administrator who should contact IQX support.

Sales Pipeline Enhancements

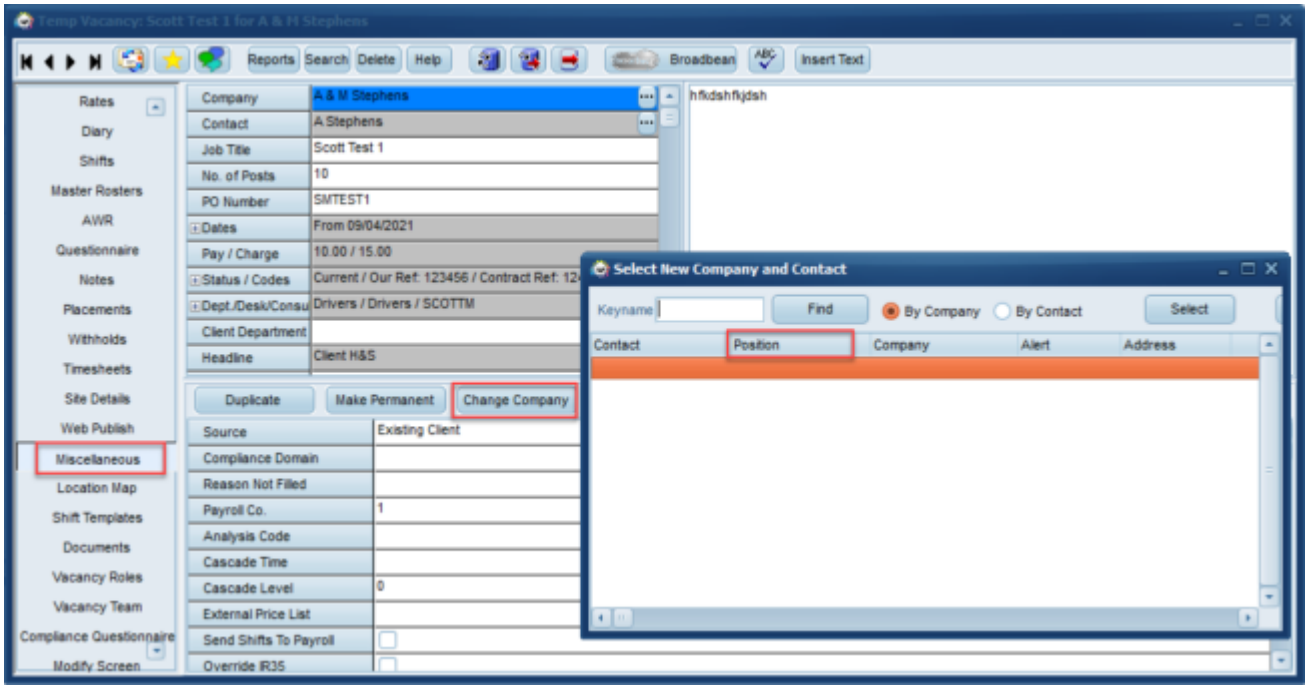
In Sales Pipeline a Contact Event is now started and shows on screen as soon as a new record has been created. This is in addition to a Contact Event being started when a record is dragged from one state column to another.

Addition of a filter to find a record quickly.

If no records are selected the Process button will process all the records.

Contact Position column added when changing client on a vacancy

When on the Miscellaneous view of a Vacancy, if you press on the Change Client/Company button, the Select New Company and Contact form now has a column for the Contact Position. This is also the case if you add a new temp vacancy from the Temp Desk.



Filter on Invoice Temp Timesheets View

A filter has been added to Accounts - Invoice Temp Timesheets view for ease of finding individual

timesheets when you need to do a credit and re-issue.

Fixes

- Fixed Expense Images added in portal when being viewed on Timesheet.
- When changing Secondary Agency under the person headline the Bank Details are no longer cleared.
- Fixed Timesheet Validation to use Modulus if bankscan.dll not present.
- Fixed issues when trying to complete timesheet that needs an override code.
- Fixed accounts issue where imported data was showing as Outstanding because it didn't not come through the allocation process.
- Fixed in IQXAnywhere the Documents attached to invoices using Add Docs was attaching to wrong invoice.
- Fixed issue with Notifications if the Notification Type was QueryBook it wasn't listing all shifts if someone had unavailability entered.
- Person Postcode distance from Vacancy now pulls through into notification when using field {VAC_POSTCODEDISTANCETOPERSON}.
- Fixed sending notification to Client for multiple temps expecting to send multiple times.
- Timesheet image linking with filenames containing accents, acutes etc, was producing blank PDF invoices. This has now been fixed.
- Fixed the Mongo Db Interface, updated code.
- Fixed duplicating an online reference returning the same urlcode as original.
- Fixed issue with hiding duplicate shifts on Fill Shifts wizard.
- Index added to tempshiftplan.analysiscode.
- Fixed in IQXAnywhere the right click menu options in SQLTool.
- Fixed searches for Perm vacancies using the Desk Type and Shift queries.
- Fixed emails with Digital Signature not showing in Inbox. Readmailitem function (iqemail.pas) wasn't able to read the rtfbody.
- In JobRunner if unable to log into the local email client or the specified SMTP server a following <Else> tag will be executed if present.
- When selecting more than one recipient for notifications the Arrow focus now moves back to top line after sending.
- Fixed broadbean not defaulting to non-European addresses when link enabled.
- Fixed Contacts Selector - Mail Chimp subscription.

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