Release 2.25.20

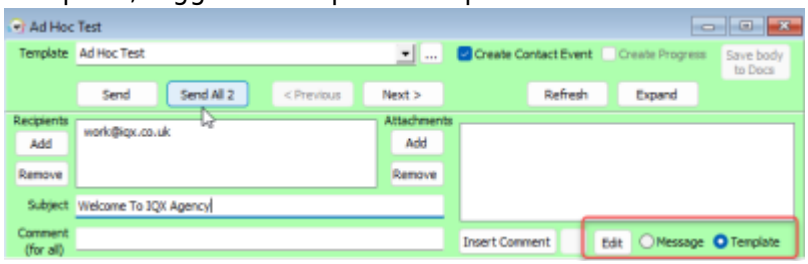
If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

- Features
- Enhancements
- System Administrator
- Fixes

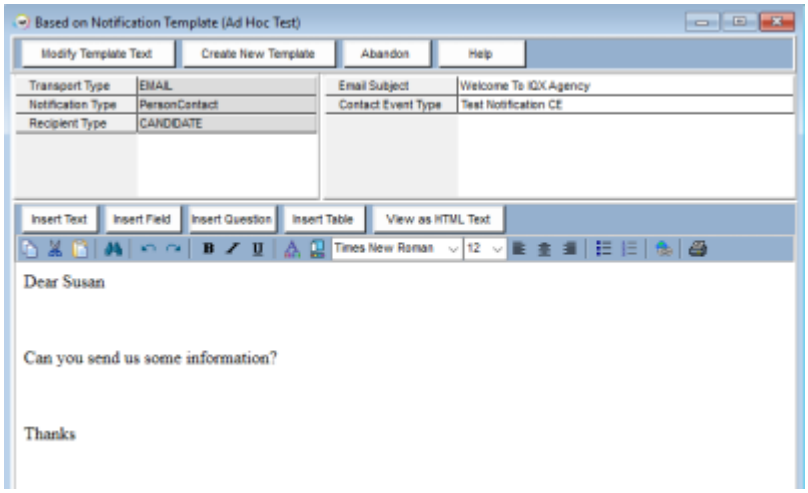
FEATURES

Ability to edit email to all recipients

Notifications has been extended to enable users to edit templates on the fly for all in the selection. If enabled by your agency it is now possible to edit all notifications in a selection and not just the first one. For templates that have been set up to be edited there is a new option to Edit Message or Template, toggle to Template and press the Edit button.

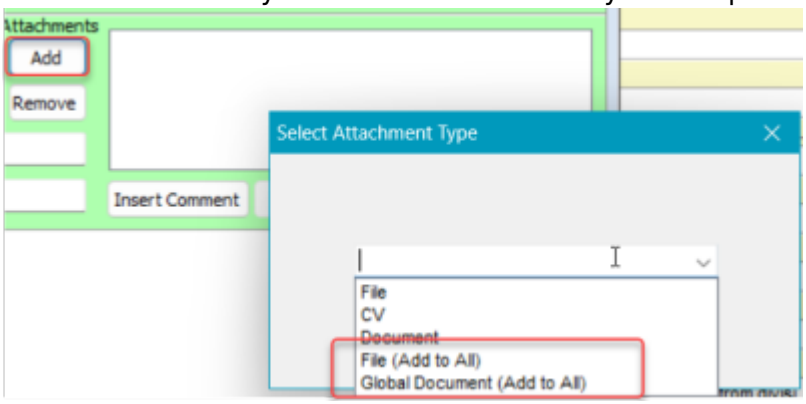


This will open a new window where you can add extra text, include merge fields and make changes to colours, fonts etc.



If these are one off changes for this particular mailer use the Modify Template Text button to keep the changes while you send. If you think it is a template you will want to use again in the future you can use the Create New Template button and give it a new name. This template is not a global template and will only be available to the user that created it.

It is also possible to add documents on the fly to all emails, there are new options on the Add button for attachments so you can select a file from your computer or a global document.

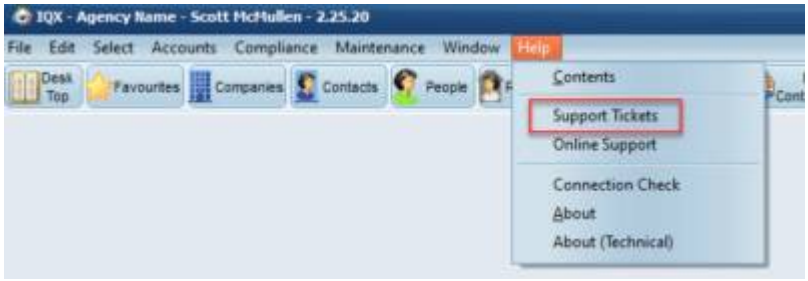


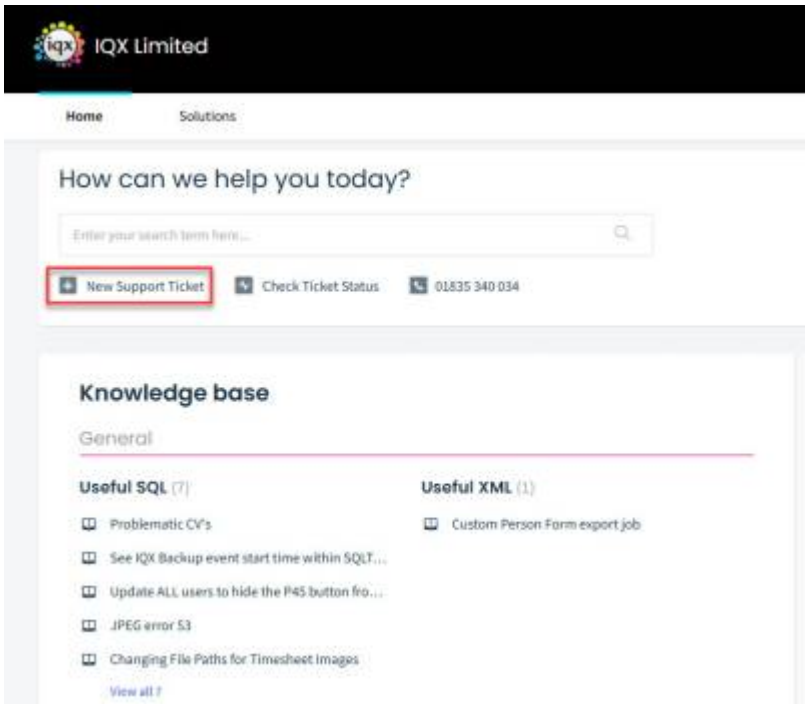
This feature Requires System Administrator set up.

Help Support Tickets

A new user role has been created that will allow users with this role to create new Support Tickets directly from IQX.

Users that have the role assigned should go to Help>Support Tickets and then click on New Support Ticket on the page that opens up.





This feature requires System Administrator set up.

Hot swap files in Global Documents

For agencies that use Global Documents there is now the ability to update a document to a newer version but retain the original document ID. This is particularly useful for things like registration documents as these can often change. Previously when one of these documents required updating, it meant deleting the old, uploading the new then re-grabbing the globaldocumentid and updating the softwizardcontroller.

Now this can be done using the new “Update Document” button in the Global Documents view - Maintenance>iqxWEB Setup>Global Documents.



Notes - The new file must have the same extension type as the one you are updating. (If existing file is .doc you can only update with a .doc). This will only update the blobstore entry, it is not changing anything else eg the description. If needed the description can be overwritten manually just by typing the new description.

ENHANCEMENTS

'Worked' shifts can be included in Invoice Shifts

Worked shifts can be included on a client by client basis when invoicing from shifts and bypassing the timesheet by selecting Allow Invoice Worked Shifts on the client miscellaneous view.

Attach Payroll Documents to Contact Events

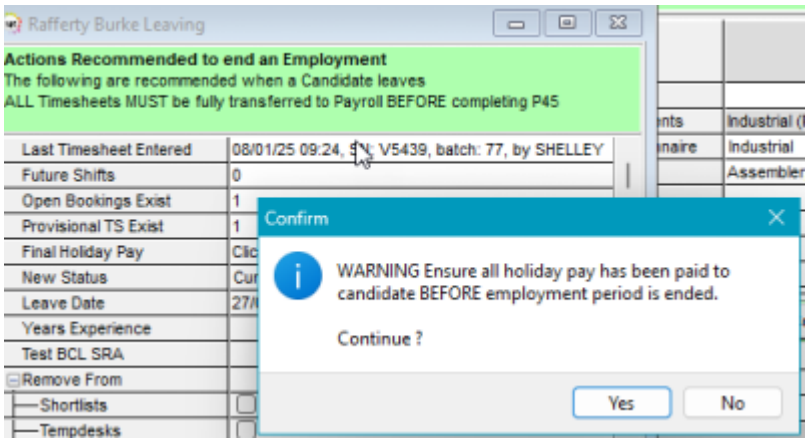
It is now possible to pick up and send payroll documents via the documents option on a notification and contact event. Note a contact event must be created when sending from a notification.

Rate Scheme - Notes Field

A new Notes view has been added to rate schemes allowing agencies to capture information relating to why they were priced as they are, what particular calculations have been done, any discussions with the client etc.

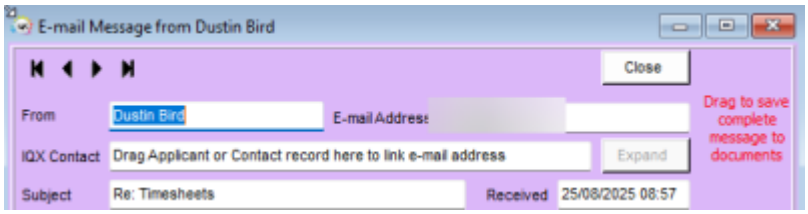
Holiday Pay Warning when P45'ing/ending employment periods

As holiday pay only looks at the current employment when ending an employment period, either by P45'ing a candidate or adding an end date to the employment period, a new warning has been added so users can ensure all holiday pay has been paid to the candidate before the employment period is ended.



Inbox Enhancement

Emails can now be dragged from the IQX Inbox and saved as an email on the documents view of a record. This is particularly useful if you receive an email confirmation of timesheet hours rather than a signed timesheet as it can then be picked up in a notification from the Send Invoices view and sent along with the invoice. The email can be dragged to any documents view



Web References Select a Template

Improvements have been made to the online references so that users can select which email template they would like to send with the reference.

Please contact IQX for more information and assistance with setting this up.

Notification Enhancements

Setting Progress State

The ability to set the progress state after a notification has been sent has added to the template when the recipient is Agency so you no longer have to use the function..

Generic Progress Template

Consultants can now select one or multiple candidates on the shortlist that are all in the same state and send them the generic progresscode template rather than only having the option of specific templates for that progress state.

Notification recipient Function BCC

The Notification Recipient function can be used so you can send a notification to a larger list of contacts as BCC. This solves an issue that was found that if you added a list of recipients to the CC or BCC fields directly within the notification template the character limit meant that not all the email addresses would be shown. Note this only works when the transport type of the notification template is email.

This feature Requires System Administrator Setup.

Selecting a Template

In addition to the drop down menu for selecting a template there is now an ellipses next to the drop down menu which opens a new window with a list of templates and a filter to make finding the template you are looking for faster and easier.

Confirmed Shifts Colleague Fields

When using COL fields in a Notification template from the Confirm Shifts view, you can now tick specific lines, and only those selected candidates will be included in the notification. Previously, all candidates were returned, regardless of your selection. Temp Confirmed and Client Confirmed are the tick boxes that should be used to select the relevant people you want to include.

Frequently used Boroughs on Fast New Wizard

If your agency uses Frequently Used Boroughs these are now part of the Fast New Wizard.

SQL Font Size Remembered

If you change the font size in any of the following places it is applied to the others and stays at the font size you have set. SQL Tool (both Modal and Non</del>Modal), Report Builder (SQL), and Database Functions.

Filters Added

Filters have been added to various views in IQX to help with accessing the data you are looking for/wanting to update quicker.

Fixes

- Fixed in IQXAnywhere the Collabora mail merge picking wrong fields where connectivity was reconnected whilst sending
- Fixed in timesheet query log, … button on file, not displaying file
- Fixed an issue where COL fields caused display problems if placed in certain parts of a Notification template. You can now place them anywhere, and the template will display correctly
- Fixed location of fixed reports in IQXAnywhere
- Fixed error in embedded Job in WPK
- Fixed issue on shortlist where Select All didn't obey the filter
- Fixed issue where person documents weren’t attaching when sending emails from Send Cv’s on a vacancy shortlist
- Fixed issue where mac users could not upload pdf’s to compliance documents

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