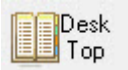
IQX booking consultant guide (shifts)

Desk Top



Check here every morning for work to be done.

- Daily work list: Combination of Diary, Contact Events for Callback and ShortList progress.
- Diary: Reminders and Appointments organised here.
- Inbox: Shows the Emails in the PC's inbox. Emails can be saved/replied to as Contact Events.
- Progress Due for Action: Short Listed Candidates with Action Dates to be worked on. F2 will start a linked CE. State can be changed and Action Date changed/deleted.
- Contact Events due for Callback: CEs that have been marked for Callback. F2 will start a continuation CE. Done clears the date from the callback field in the CE.
- Current Vacancies: State is current so to be worked on.
- Unauthorised Placements: Perm Placements waiting to be Authorised for Invoicing.

Contact Events F2



A Contact Event (CE) can be made from anywhere a person link exists - a selector, record, temp desk, shift form - to initiate or record a letter, email or conversation ie. Availability or booking.

To link a CE to both candidate and client make the contact event from Confirm Shifts, from a Placement or Timesheet in the Temp Desk or from a Short List Progress form.

A new CE can be started from an existing one by using the contact event button, using F2 or you can duplicate the existing CE by using Duplicate button.

Candidate Availability

From Temp Desk>Temps or Person>Diary. Use the **Available** button. From Person>Availability use the Enter Availability button or right click on the day cell and enter.

On Temp Desk> Temps view, click on the column header (showing the days) to filter to Temps who have Availability entered for that day. Click again to clear the available filter.

Enter Shifts

Temp Desk> Vacancies: Click Show: Current State, Select the Vacancy, **Add Shifts** opens the Bulk Add Shifts wizard. Use **CTRL + Add Shifts** for alternative shift adding view.

Vacancy> Diary: Click the **Add** button so it is yellow, select type and click on required days, then click **Add** again. Holding down **Shift** key while selecting opens the Bulk Add Shifts wizard.

Vacancy> Shifts: The **Add** button opens the Bulk Add Shifts wizard. *Use with CTRL for alternative add shifts view*

The shift templates may have a minimum Grade, Essential Primary Role and Time range associated with them to filter searches for Temps. Times can be altered and Order information entered.

Temp Desk> Shifts: shows all shifts - full details are in the lower part of the screen. Shifts are managed individually here.

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