IQX Perms

Candidate

Add a Candidate via the Word CV macro. Highlight and right click to enter key details. (Bulk CV addition possible) Select appropriate state, usually Current. Register to Department. Enter key skills for searching. Format CV, Documents. To withhold a candidate from a previous employer make sure an Employment has been added on the History view and use the Withhold button. The line will then be red and that employer excluded from Vacancy searches.

Client

Before a first invoice a Client should be cleared, their state must be Client, with Account Code, Invoice Address, Group, Their Ref and Days Credit information entered. Terms & Conditions should be completed for the client when a Vacancy added, and sent with CVs. Checks and changes to Client and Candidate details must be done before invoicing.

Contact Events / Actions

F2 / 

A contact event (CE) can be made from anywhere a person link exists - a selector, record or shift form – to initiate or record a letter, email or conversation. Ie Canvass Calls, Availability. To link 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. An email can be dragged from Inbox to Progress, Placements, etc. to ensure full links. A new CE can be started from an existing one by F2 or by using Duplicate button.

Desk Top – main work area

- Diary: Reminders and Appointments organised and added here.
- Inbox: Shows the Emails in the PCs Inbox. Emails can be saved/replied to as Contact Events

Drag from Inbox onto a Vacancy, Progress of Placement for max links.

- Progress due for Action: Manage Short Lists from one place by their Action Date. Progress can be advanced, CEs made, Easy to Mailmerge.
- Contact Events due for Callback: Use every day for 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: Groups your Vacancies of state Current
- Unauthorised Placements: Lists Placements waiting for completion and invoicing.

Add Vacancies

On a Client form first select the Contact, then on Vacancies view: use the Add button, check the Department, enter the Position. You can also create a new vacancy using the New Vacancy button directly on the Contact Event to the client Contact.

Step through the wizard as required. Add Dates, Salary, Job Description, Requirements.

Complete Rates, Site details, Web Description etc. if required.

Short List

- Expand the Vacancy: Search button matches candidates to the vacancy requirements.
- Search Targets – make changes to the default, if required.

Search Requirements – amend or add. Review the Search results –tick those you want to add to the short list. You can Expand the candidate records to inspect further, and use the Select button to add the person to the vacancy short list. Use the video buttons to work through the expanded candidate records and add to shortlist. A candidate will be shown as not 100% available if Unavailable/Holiday has been entered or has an ongoing placement that is NOT ticked for Concurrent. Progress the Candidates through the Short List – USE THE DESKTOP to manage and communicate

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