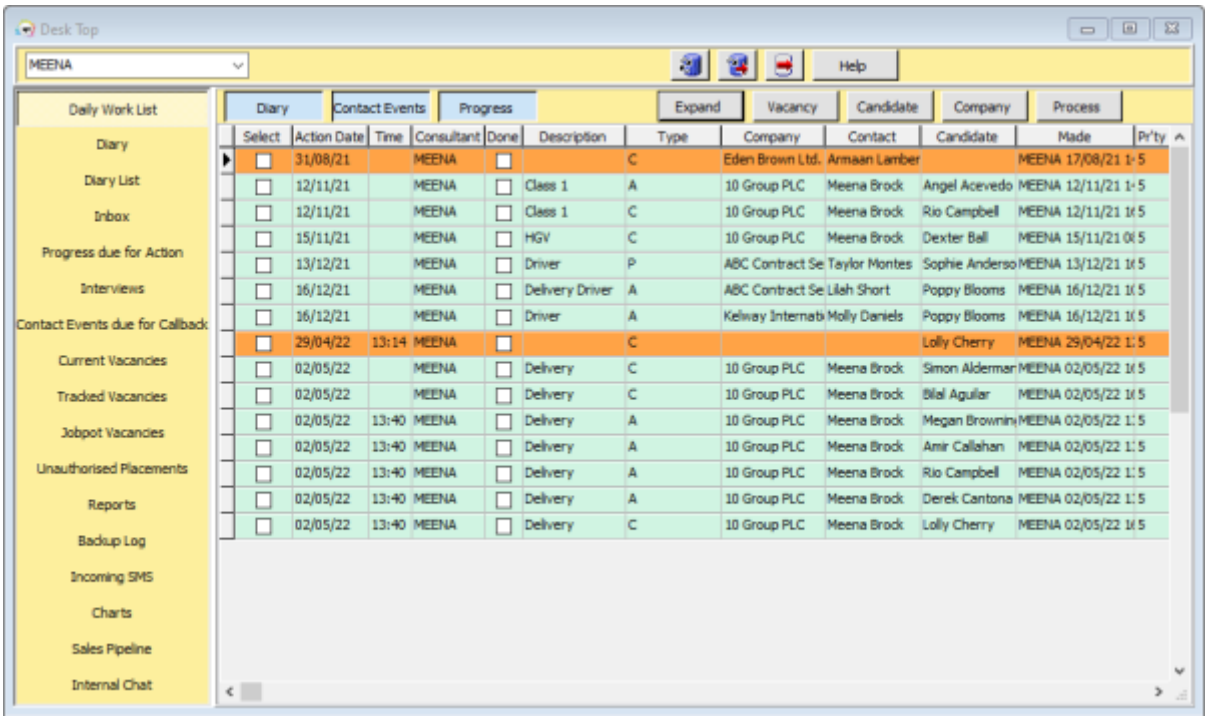
Desk Top

The Desk Top is the main view to use to see all items that are in progress. There is a consultant filter in the top left of every tab to allow you to choose the consultant.



Diary Work List

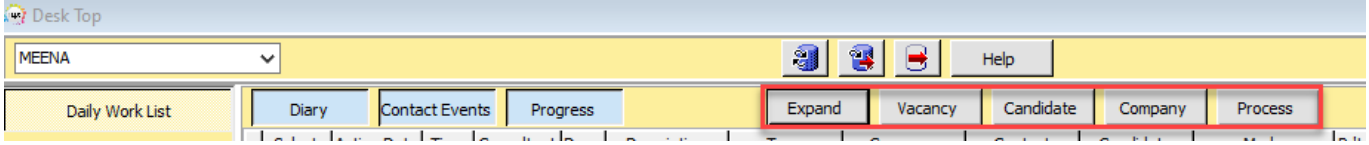
Here you will find all items that require actions. You can filter by Diary appointments, Contact events and progress by using the corresponding buttons. These items are also colour coded so you can identify what each item is at a glance. The colours are as follows:

Diary - White

Contact Events - Orange

Progress - Green

You will also find buttons that will allow you to expand the item, take you directly to the vacancy, Candidate or Company record and you can also process items from here. Again this can be done by clicking on the corresponding buttons.



Diary

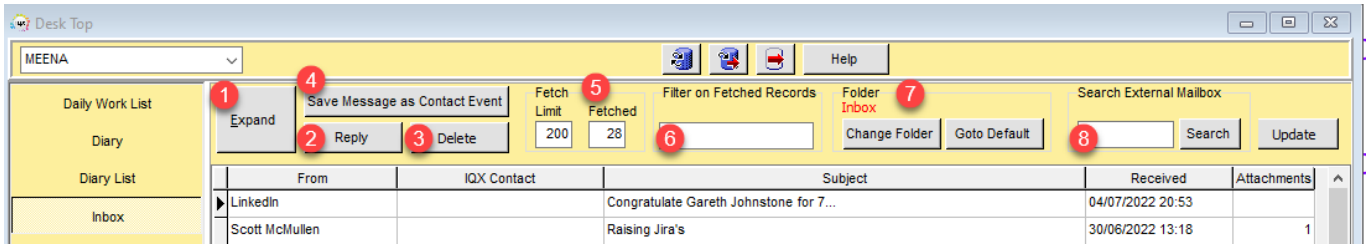
From here you can see all your appointments and reminders, you can also create diary appointments and reminders from this view. To learn more about Diary appointments and reminders click here How to use IQX Diary and Appointments

Diary List

From this tab you can view all your Diary appointments. You can expand them and make changes or set them to pop up by ticking the 'Popup' box.

Inbox

You can view your outlook emails from this tab.



There are several actions you can make from this view.

1. Expand and read Emails
2. Reply to Emails
3. Delete Emails
4. Save email as Contact Event
5. You can set the limit of the number of emails that will be pulled through (Max 200) and you can also see how many have actually been fetched
6. You can filter the fetched Emails to find specific ones
7. You can also change the folder the Inbox pulls from and search in sub folders
8. If there are more than 200 emails in your Outlook inbox, you can search the entire inbox for a specific email

Progress Due for Action

Here you will find a list of all items due for Progress. To learn more click here Progress due for Action

Interviews

You can view all the arranged interviews from here. There is a filter where you can select Past or Future interviews. You can also send notifications from this view, expand the Candidate or Vacancy record or process the items.

To learn more on creating interviews click here How to arrange interviews for a vacancy

Contact Events Due for Callback

This is where you will find a list of all your contact events that require a call back. You can also directly open the Company or candidate record from this view or process items. Once a callback has been actioned you can set this to 'Done' by ticking the box, these items will no longer show in the list after you update/refresh the Desk Top.

Current Vacancies

This view lists all current vacancies, you can filter this by consultant by using the drop down filter at the top left of the Desk Top view and also by vacancy type - Perm, Temp or either. You can perform a count of all vacancies by clicking the 'Count' button and can also go directly to the Company record or process items from this view.

Tracked Vacancies

Here you will find a list of all vacancies that are of a particular vacancy state. This is specified by the agency and set up in General setting 2070.

Jobpot Vacancies

This will list all other vacancies that are under using the extra states. This is specified by the agency and set in General settings 2072.

Unauthorised Placements

This is where you will find a list of all Placements that still require authorisation for invoicing.

Reports

All reports that pull from the Desk Top will be listed here.

Back Up Log

This will show all completed back ups.

Incoming SMS

If made available by your Agency, this tab gives you quick access to view incoming SMS messages.

Charts

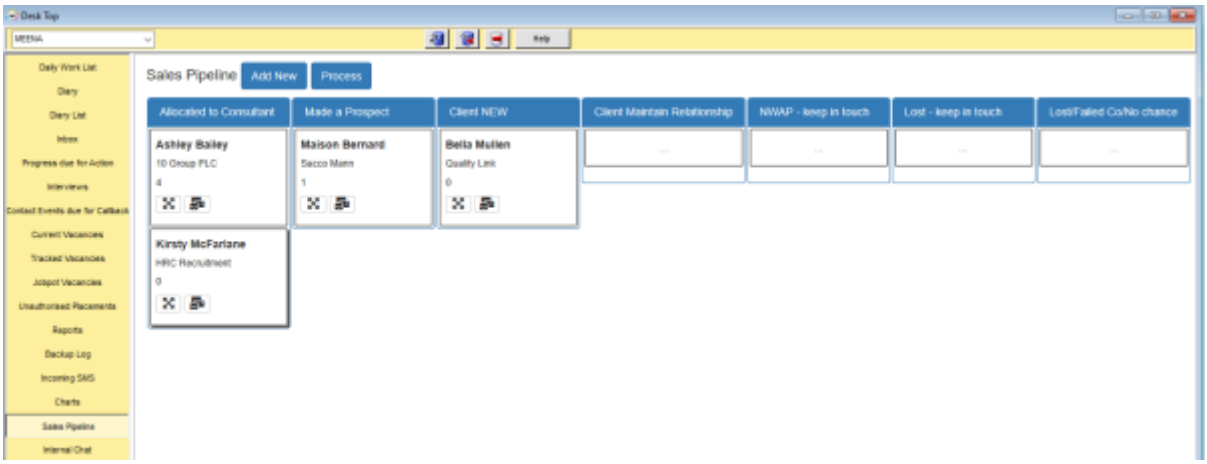
Here you can view analytic charts that have been set up by your Agency. To learn more click here Charts

Sales Pipeline

This is a tool that allows you to easily track potential future Clients in one area. With different progress states we can see exactly where Clients currently are and if they need any action made against them.

Within IQXanywhere locate the Desk Top and 'Sales Pipeline' You will see headings which Admin would have previously set up for this area.

Start adding Clients which have been in contact/need contact placed against them Clients can be moved along the progress states by clicking and dragging the client over to the next state.



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