



How to Add a New Candidate Record

There are a few different ways you can add a new candidate.

Using the NEW button on the Person Selector

Click on the People icon on the toolbar to open the selector form.

Click on the New button, this will open the Person Details wizard to be completed.

New Applicant

Register Applicant

You can populate data fields by highlighting items and right-clicking the mouse

Enter Applicant details

Division: The Agency

☐ Name

- Surname
- Forenames
- Full Name
- Salutation
- Keyname
- State
- Available From

Pre registration

☐ Personal

- Gender
- Payroll Title
- Date of Birth
- NI Number
- Home Phone
- Day Phone
- Mobile
- E-mail
- Payroll Email ...

☐ Address

- Address
- Town
- County
- Country

[Parse CV](#)

< Back Next > Cancel

You cannot edit the lines that are in grey, as they will be generated from items entered in the expanded group of fields. Move to the next line by tabbing, this will auto-fill fields. The information that you are asked for depends on what has been requested and set up by your company, but should include all of the following:

Name	This will be generated as you enter the names in the Surname & Forename fields.
Surname	Candidate's surname.
Forenames	Candidate's forename.
Full Name	This is generated from the names that you enter.



Salutation	This is generated from the names that you enter. It is used for letters and e-mails, ie. Dear <Salutation>. You can overwrite this field to show their 'nickname'
Keyname	This is generated from the names that you enter. It can be edited, e.g. put in spaces.
State	This will default to Agency initial applicant state setting.
Consultant	Select a name from the drop down list.
Registered	This is set to today's date
Number	This is the candidate's number that is generated by IQX. It is initially empty until the wizard is finished.

Once you have entered all the key information, click on the Next button.

Work through each screen entering all the relevant information that you have on each.

General Questionnaire

Payroll Information

Registering with a Department

Perm/Temp Employment (Note you must select at least one of these employment types)

Register to a Temp Desk if relevant

Department Questionnaire

Adding a Person from a CV



Open the CV in Word and use the  macro button that should be installed on your PC by your Agency. For Word Versions before 2007 the IQX Icon will show on the menu bar on the right. For Word 2007 there will be an extra Menu item called Add-Ins and the IQX Icon will be in that view.

In this instance the Person Wizard will be opened with the CV in plain text on the left panel. You can then click on the Parse CV button underneath the CV text and this will auto populate the main fields with the relevant information.



New Applicant

Register Applicant

You can populate data fields by highlighting items and right-clicking the mouse

Enter Applicant details

Division: **Town Industrial**

☒ **Name**

Surname: **Kirkup**

Forenames: **Barbara**

Full Name: **Barbara Kirkup**

Salutation: **KIRKUP BARBARA**

Keyname: **Pre registration**

State: **Pre registration**

Available From: **37**

☒ **Personal**

Gender: **37**

Payroll Title: **37**

Date of Birth: **01/01/1975**

NI Number: **01835 340 034**

Home Phone: **07777 777 777**

Day Phone: **barbara@byonder.co.uk**

Mobile: **barbara@byonder.co.uk**

E-mail: **barbara@byonder.co.uk**

Payroll Email ...

☒ **Address**

Address: **10 The Drive, Atown, Edinburgh, EH1 2AB**

Address: **10 The Drive**

Atown

Town: **Edinburgh**

County: **Edinburgh**

Country: **Edinburgh**

Parse CV **< Back** **Next >** **Cancel**

Barbara Kirkup
10 The Drive,
Atown
Edinburgh,
EH1 2AB
Phone 01835 340 034
Mobile 07777 777 777
E-mail barbara@byonder.co.uk
date of birth
01/01/1975
resides
Edinburgh
experience 1998-1999 A Company
I was initially employed as a general carpenter, I was then asked to become
general foreman based on my all round knowledge of construction, my duties
included measurement from site and drawings, scheduling works on site,
organizing both sub contract and direct labourforce, setting out of works, and
basic health and safety plans. This was involved in mainly in hospital and
school repairs and re fits of various sizes and costs.

1999 - 2000 B Company
I was employed as a foreman carpenter to work on the new British Embassy
in Moscow, main duties were working in the secure areas of the embassy,
organizing labour within the secure area, liaising with the management team
outside the secure units, site measurements, quality control which had to be
extremely high, reporting of daily/weekly work schedules, implementing health
and safety plans.
From this position I gained invaluable experience in man management in
dealing with general work force and within the managerial team, this was my
first role in administration and of a very high class of quality control of
materials and finished product.

Populate other fields by highlighting the text on the CV, right clicking the mouse and selecting the destination field.

The following fields can be populated in this way - Surname, Forenames, Full Name, Salutation, Postcode, Country, County, Town, Rest of the address, Date of Birth, Gender, Home Phone, Day Phone, Mobile and e-mail.



New Applicant

Register Applicant

You can populate data fields by highlighting items and right-clicking the mouse

Barbara Kirkup
10 The Drive,
Atown
Edinburgh,
EH1 2AB
Phone 01835 340 034
Mobile 07777 777 777
E-mail barba...

☒ Surname: Kirkup
☒ Forenames: Barbara
☒ Full Name: Barbara Kirkup
☒ Salutation: Barbara
☒ Postcode: EH1 2AB
Country:
County:
☒ Town: Edinburgh
☒ Rest of Address: 10 The Drive, Atown
☒ Date of Birth: 01/01/1975
Gender:
☒ Home Phone: 01835 340 034
Day Phone:
☒ Mobile: 07777 777 777
E-mail:
Cut

Register Applicant

Enter Applicant details

Division: Town Industrial
☐ Name: Barbara Kirkup
Surname: Kirkup
Forenames: Barbara
Full Name: Barbara Kirkup
Salutation: Barbara
Keyname: KIRKUP BARBARA
State: Pre registration
Available From:
☐ Personal: 37
Gender:
Payroll Title:
Date of Birth: 01/01/1975
NI Number:
Home Phone: 01835 340 034
Day Phone:
Mobile: 07777 777 777
E-mail:
Payroll Email ...:
☐ Address: 10 The Drive, Atown, Edinburgh, EH1 2AB
Address: 10 The Drive
Atown
Town: Edinburgh
County:
Country:

< Back Next > Cancel

The right hand side will show the data as it is added.
Thereafter use the Next button and work through the wizard as usual.
You will have the CV on display to help fill in the Questionnaires.

See also [Add CVs from Bulk CV Import](#)

Back to [Quick guides / How to](#)

From:
<https://iqxusers.co.uk/iqxhelp/> - iqx

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=quick_guides_2&rev=1364913215

Last update: **2017/11/16 21:57**

