Maintenance, Agency Setup

1. Company State – Add state of code ‘A’, description ‘Secondary Agency’
2. Person State – Add state of code ‘A’, description ‘Secondary Agency’

Maintenance, General Settings, Temps
Four settings to be set up.

1. Use Secondary Agencies – set to Y
2. Secondary Agency State Code – Enter the State of the Secondary Agency codes above. (They must have the same code – ‘A’ is recommended.)
3. Cascade to Secondary Agencies – leave empty unless External Jobs are going to be used.
4. Secondary Agency External Refs on Timesheet – if Y then Secondary Agency Timesheet and Refs can be entered in the Timesheet.

Maintenance, General Settings, Colours
Confirm that colours have been set to distinguish Secondary Agency forms.
Clients
Add a Client as normal – then Select Secondary Agency as the State. The colour of the background will change to show that it is a Secondary Agency. There is an extra view on the left called Temp Desk. Tick all the Temp Desks for which this Agency will be used.
Candidates
Usually added on the fly as a Placement is being entered or a Shift filled. To add from the Person form enter a State of Secondary Agency, then tab to the bottom of the section to link with the Secondary Agency they work for and add/edit the Ref.

Usage
Contract Vacancies Make Placement – has now got a button called ‘Use Secondary Agency Applicant’ Click to bring up list of Agencies, Select Agency and use Select button – a list of that Agencies temps appears (blank if no Temps on system) or use the New button to add a new Temp to that Agency. Continue as normal. On the placement view the colour is different to signify a Secondary Agency Temp.

Shift Vacancies Fill Shifts – as you would with a standard temp but select the Secondary Agency Temp radio button on shift match screen. Then you select the Agency, then select a Temp or add a new one. Finally allocate the shifts.

From:
https://iqxusers.co.uk/iqxhelp/ - **IQX**

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=sa_maintenance_2.1&rev=1384260572

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