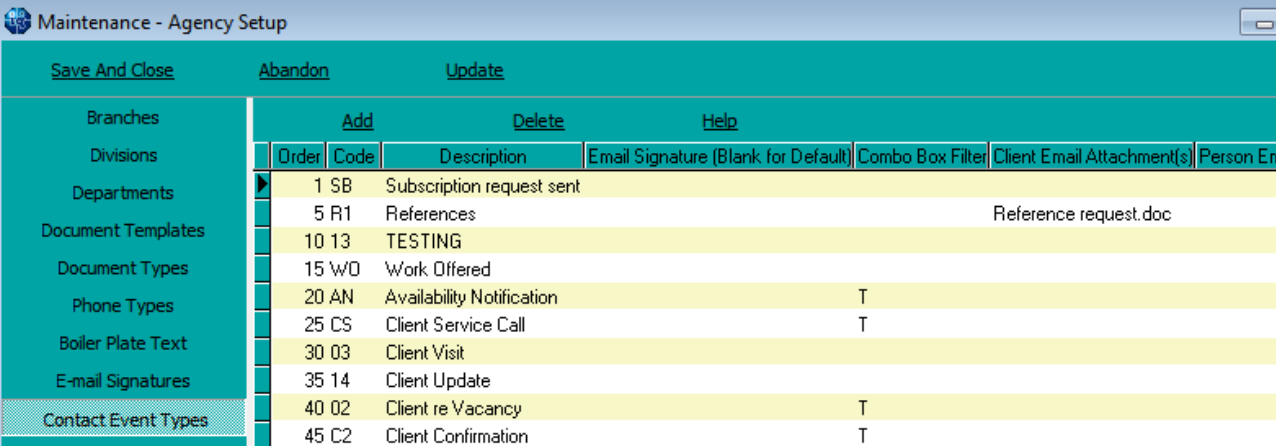




References

Set up - for Systems Administrators

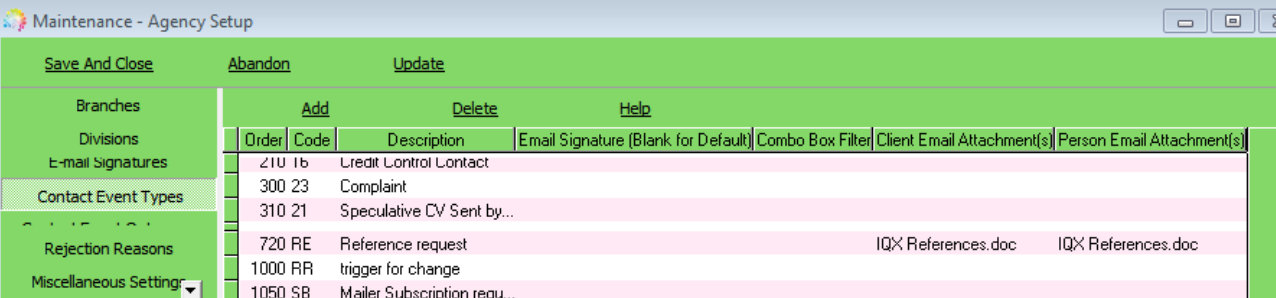
1. Create a contact event type - called Reference Request or something similar. Go to Maintenance, Agency Setup, Contact Event Types NEW.



Maintenance - Agency Setup

	Save And Close	Abandon	Update						
				Add	Delete	Help			
				Order	Code	Description	Email Signature (Blank for Default)	Combo Box Filter	Client Email Attachment(s)
Branches									
Divisions									
Departments									
Document Templates									
Document Types									
Phone Types									
Boiler Plate Text									
E-mail Signatures									
Contact Event Types									
				1	SB	Subscription request sent			
				5	R1	References			Reference request.doc
				10	13	TESTING			
				15	WO	Work Offered			
				20	AN	Availability Notification		T	
				25	CS	Client Service Call		T	
				30	03	Client Visit			
				35	14	Client Update			
				40	02	Client re Vacancy		T	
				45	C2	Client Confirmation		T	

2. If you wish to send a standard document out with the reference request, create the document and save it in the reports directory.
3. Link the document to the the Contact Event type by entering the full document filename in the client email attachment column (Agency Setup, Contact Event Types, Email Attachments.) Multiple attachments must be separated with a semi colon (;). Each time this contact event type is used to send an email it will attach the document(s).



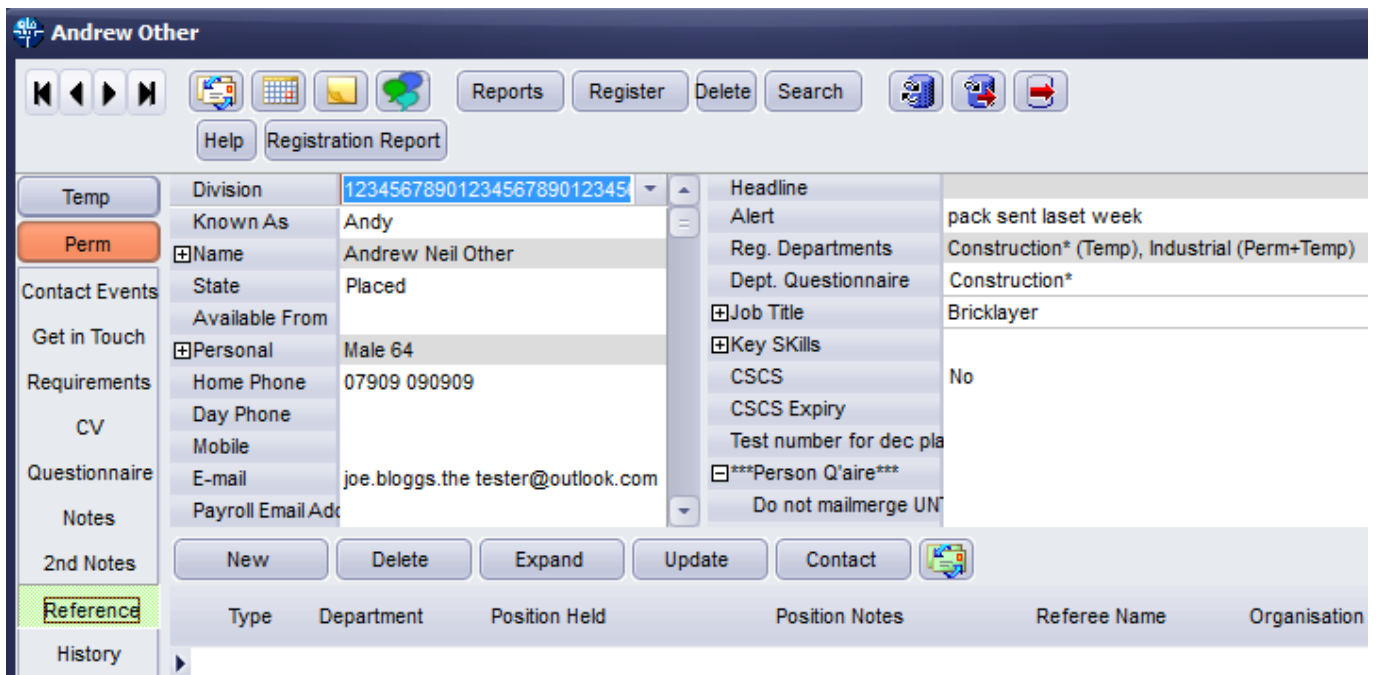
Maintenance - Agency Setup

	Save And Close	Abandon	Update						
				Add	Delete	Help			
				Order	Code	Description	Email Signature (Blank for Default)	Combo Box Filter	Client Email Attachment(s)
Branches									
Divisions									
E-mail Signatures									
Contact Event Types									
Rejection Reasons									
Miscellaneous Settings									
				210	1b	Credit Control Contact			
				300	23	Complaint			
				310	21	Speculative CV Sent by...			
				720	RE	Reference request			IQX References.doc
				1000	RR	trigger for change			IQX References.doc
				1050	SB	Mailer Subscription requ...			

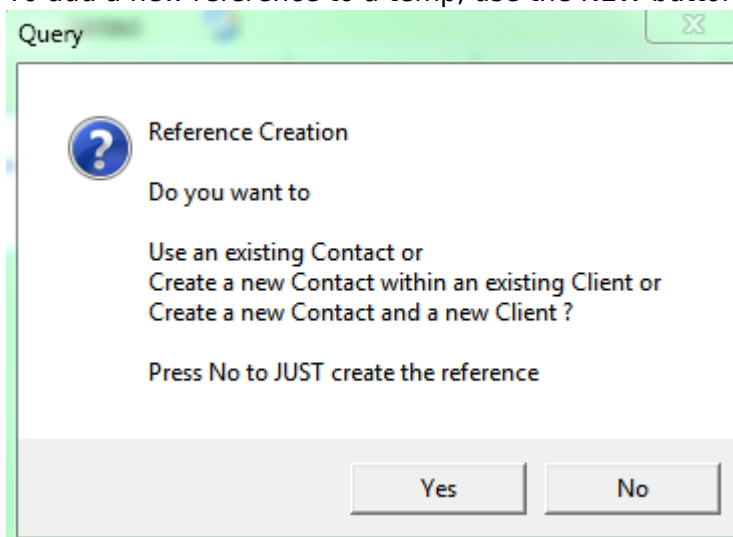
4. Create boiler plate text if you wish to have a standard email text to be used. Using the insert text on the contact event makes sending the request quicker. (Maintenance, Agency Setup, Boiler Plate Text, ADD). See also [Boiler Plate Text](#).
5. Finally switch on References for the database. General Settings, Switchable Views, 110 Person Reference Request Y.

USE

You will now see a new screen on the person form called Reference:



To add a new reference to a temp, use the NEW button. You will be given the following options.



- Clicking **yes** will allow you to search for contacts already existing in the database so you can attach the reference request to a client. You will be able to then add the contact against an existing client or add a new client if they are not already in the database.
- Clicking **no** will allow you to add the reference line without linking it to any records (for a reference request from someone who is not a client or potential client for example.)

If you click **yes** then search for the company and select the contact that is to be the referee.



Company	Address	County	Town
Barden Primary School	Burnely Campus		Burnley

Name	Position	Status
Miss Joyce D'Costa	Deputy Head Teacher	Perm Place
Mrs Lorraine Hale	Deputy Head Teacher	Perm Place
Sarah Jakes		Client
Mrs Saira Khan	Deputy Head Teacher	Perm Place

Select the company or **add** a new company. Then select or **add** the contact against the company.

This will bring up the reference form.

If you clicked **no** to create just a reference you will be taken straight to this form.

Reference Request for

Send Event: References
Type: Professional
Department: Education

☒ Referee: Miss Joyce D'Costa (Miss D'Costa)
Referee Name: Miss Joyce D'Costa
Salutation: Miss D'Costa
Organisation: Barden Primary School
Client Contact: Yes
Referee Job ...: Deputy Head Teacher
Keyname: D'COSTA, JOYCE

☒ Address: Burnely Campus, BB10 1JD
Address: Burnely Campus
Town:
County:
Country:
PostCode: BB10 1JD
Home Phone:

☒ Contact Details: Email: test@iqx.co.uk
Work Phone:
Mobile Phone:
Fax:
Email: test@iqx.co.uk
Job Title: Teaching Assistant

Job Title Notes:

Consultant: BARBARA

< Back Finish Cancel



Fill in the required fields and finish. This will open the Contact Event to send the reference; make sure the correct type is selected and then complete your email using insert text if boiler plate text has been set up and **send email**.

The referee will now appear on the reference screen for that candidate. The date that they were created and when the Contact Event to the referee was created are filled automatically. The process date and consultant fields track the progress stages of the reference.

Type	Department	Job Title	Job Title Notes	Referee Name	Organisation	Client Contact	Consultant	Reference Created	Contact Event to Referee	Reference Returned	Completed	Processed Date	Processed By
Professional	Education	Admin		Barbara Kirkup	Alfred Barrow School	Yes	BARBARA	12/02/13 12:40	12/02/13	12/02/13	12/02/13	12/02/13	BARBARA
Professional	Registrations test		add some notes here...	Helen Todd	Lillesleal Primary School	Yes	BARBARA	12/02/13 12:42	12/02/13			12/02/13	BARBARA
Reference	Personal	Registrations Floor Staff		Richard Johnson	RJ & Sons	Yes	BARBARA	12/02/13 12:46	12/02/13	12/02/13		12/02/13	BARBARA
History	Personal	Education	Student	Jane Sorens	none		BARBARA	12/02/13 12:48					

Once a reference has been returned, from your Desktop Inbox save it to the documents on the relevant records, and save the email as a contact event. See also [SAVING AN ATTACHMENT FROM AN EMAIL IN THE INBOX TO THE DOCUMENTS VIEW OF A RECORD](#).

Enter the date into the Reference Returned column. Once the reference has been checked and completed, enter the completed date on the reference screen.

Further references can be added by repeating the steps. Once a reference request has been sent the record cannot be deleted.

Reference lines that have been created but are awaiting a request to be sent are coloured green.

Lines where the reference has been sent or returned but not checked (completed) are black.

References that are completed are blue.

Search criteria can be added for references.

Each time a stage is completed (ie. a date is entered) the processed date and processed by fields are updated with the date and user details.

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Last update: **2017/11/16 21:58**

