

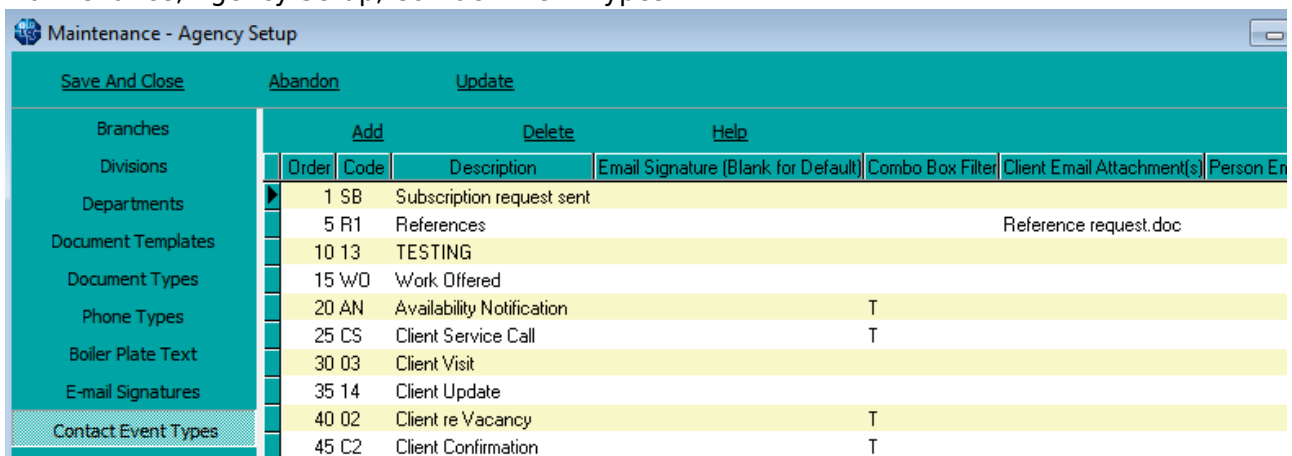


WORK IN PROGRESS

References

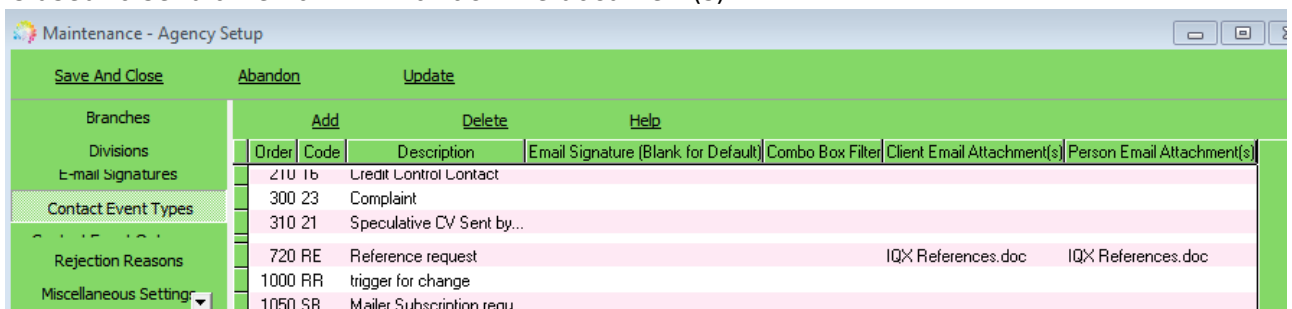
Set up - for Systems Administrators

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)	Person Email Attachment(s)	
1	SB	Subscription request sent					
5	R1	References			Reference request.doc		
10	13	TESTING					
15	WD	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).

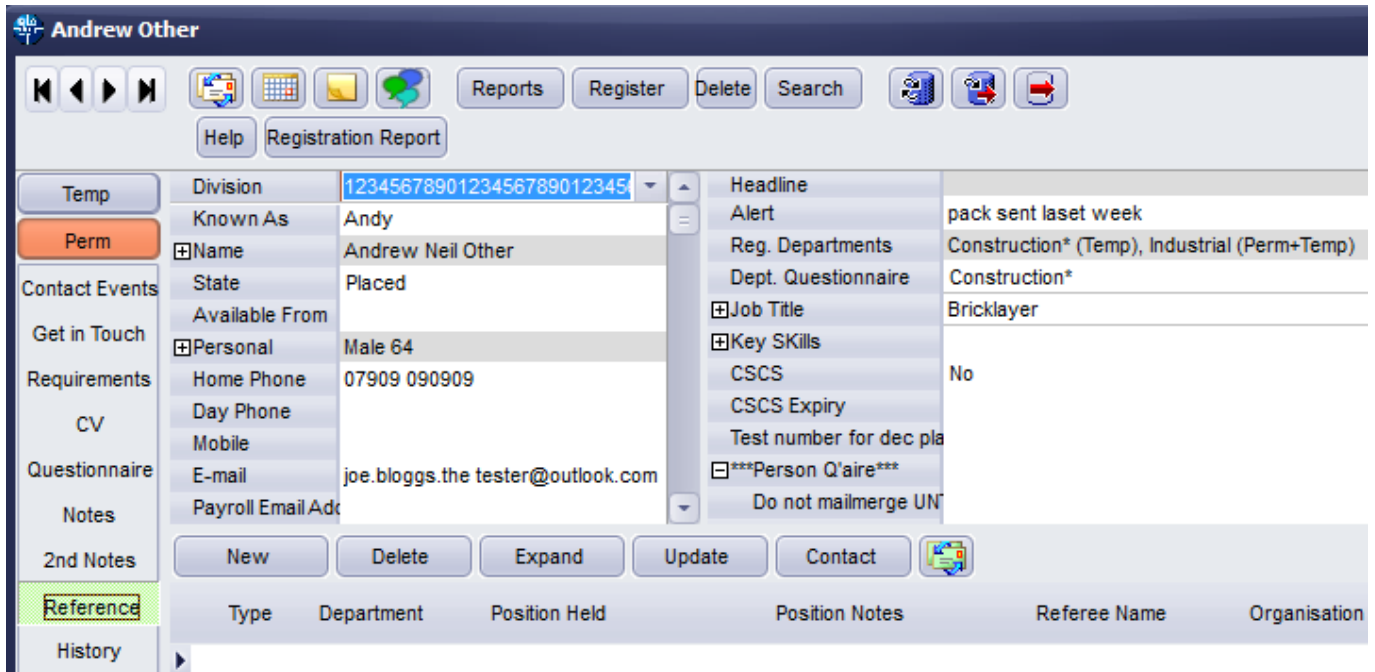


Maintenance - Agency Setup							
Save And Close		Abandon		Update			
		Add	Delete	Help			
Order	Code	Description	Email Signature (Blank for Default)	Combo Box Filter	Client Email Attachment(s)	Person Email Attachment(s)	
210	1b	Credit Control Contact					
300	23	Complaint					
310	21	Speculative CV Sent by...					
720	RE	Reference request			IQX References.doc	IQX References.doc	
1000	RR	trigger for change					
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.

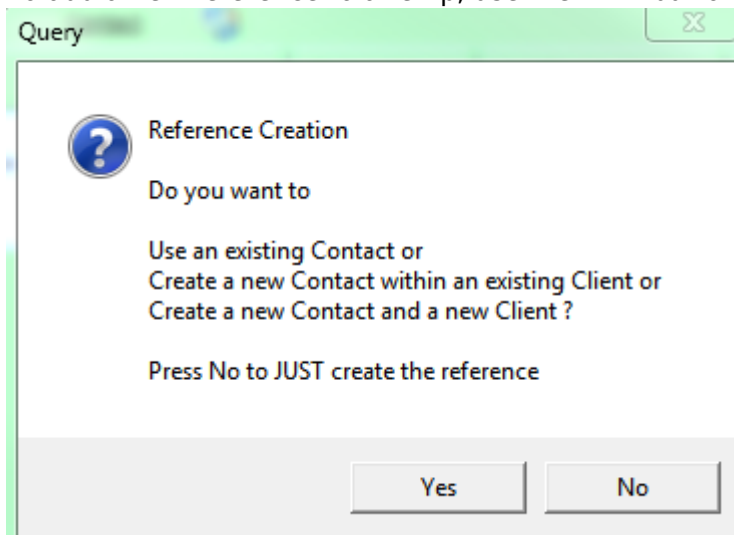
USE

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



The screenshot shows the iqx software interface for a person named Andrew Neil Other. The 'Reference' tab is selected in the sidebar. The main area displays personal details such as Name, State, Available From, Personal (Male 64), Home Phone, Day Phone, Mobile, E-mail, and Payroll Email Address. A dropdown menu is open, showing options for adding a reference, including 'Headline', 'Alert', 'Reg. Departments', 'Dept. Questionnaire', 'Job Title', 'Key Skills', 'CSCS', 'CSCS Expiry', 'Test number for dec pla', and '***Person Q'aire***'. The 'New' button is highlighted in the bottom right corner of the main area.

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



The screenshot shows a 'Reference Creation' dialog box. It contains a question mark icon and the following text: 'Do you want to Use an existing Contact or Create a new Contact within an existing Client or Create a new Contact and a new Client ? Press No to JUST create the reference'. At the bottom, there are 'Yes' and 'No' buttons.

- 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.

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



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
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
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.

Back to [Candidates](#). [How to...](#)

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