Favourites

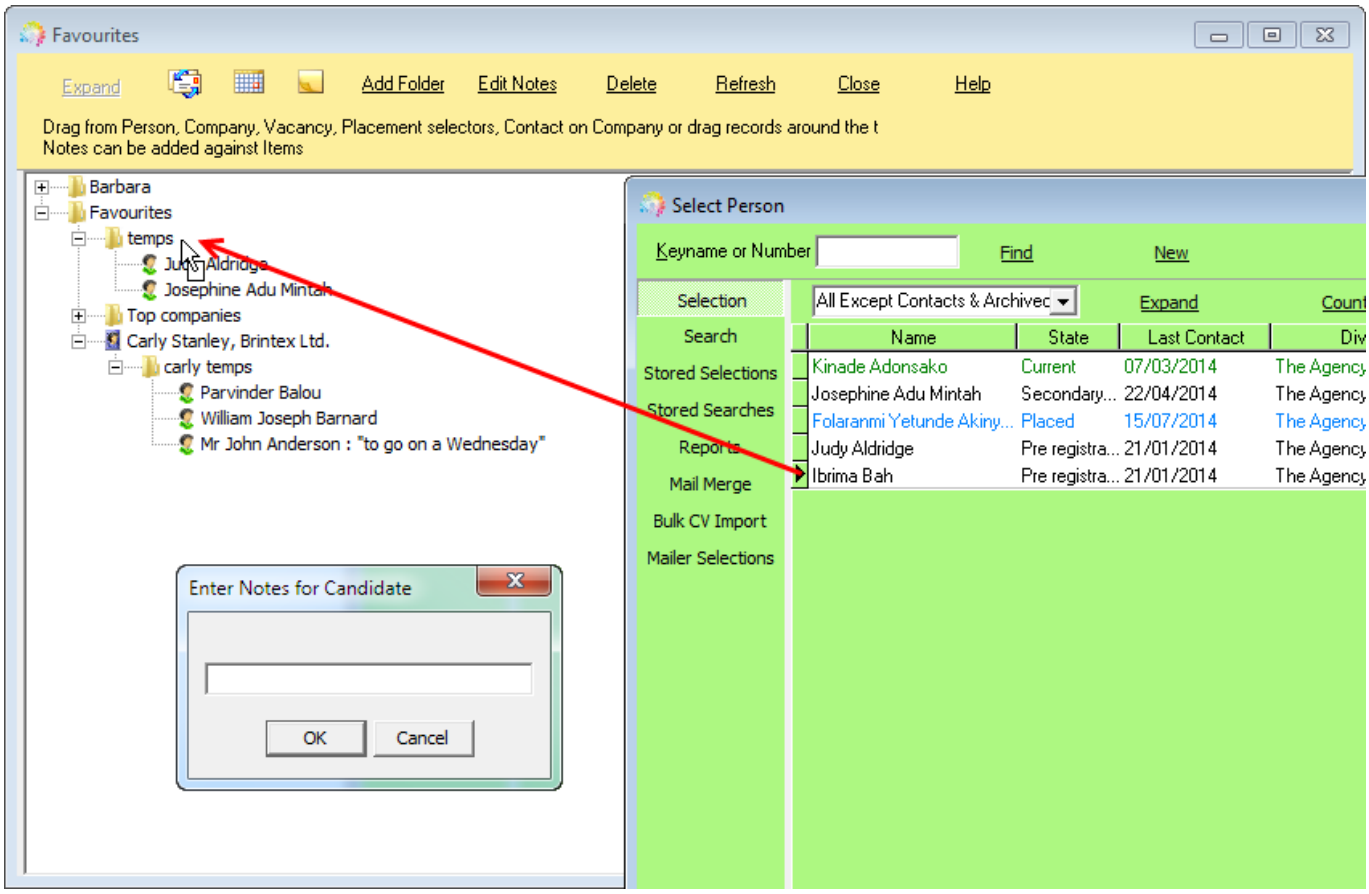
From version 2.2.9.17.



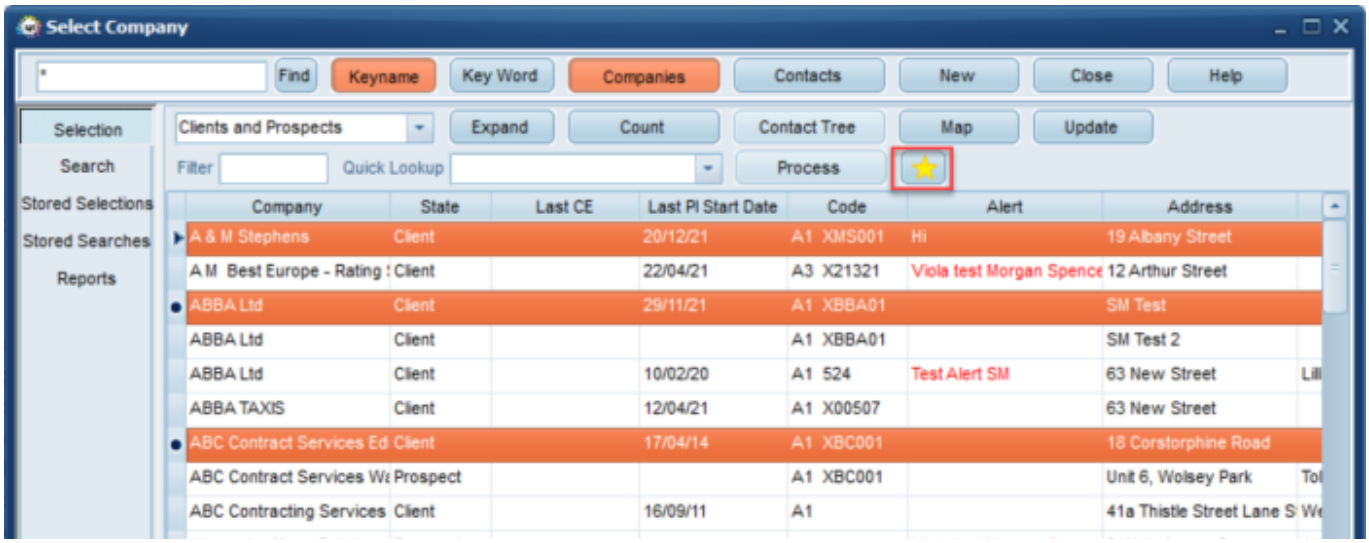
The favourites form allows creation of lists of client, contacts & companies grouped into lists that can then be easily accessed / contact events created against them etc.

Create a folder using the Add Folder button, giving it a relevant name and add notes if you wish.

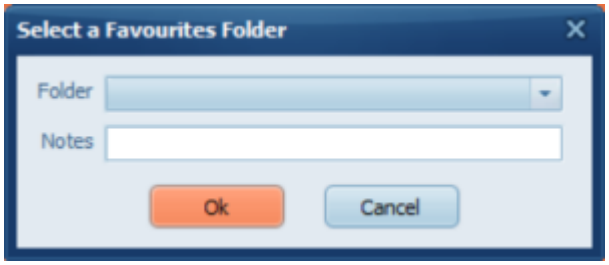
Drag and drop clients or candidates from selector forms onto the relevant list.



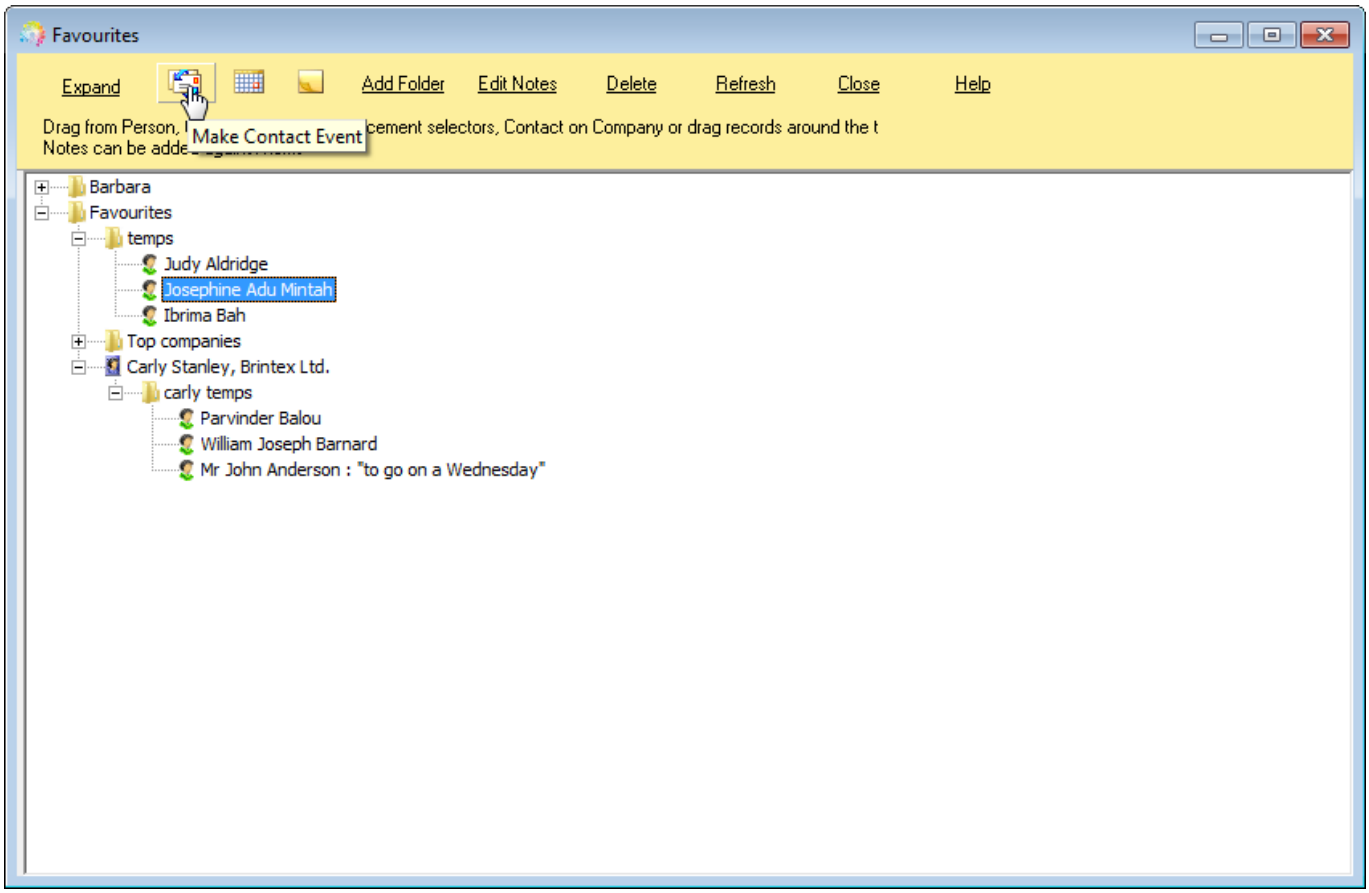
2.22.2+ You can now make a selection of records to add Favourites via the new yellow star button rather than dragging one record at a time. This can be done from the Person, Company and Company Contacts selectors. The new star button asks you to specify the folder in Favourites.



When this is pressed you get to choose which folder within Favourites these go to.



Contact events, appointments and reminders can be made from this form without having to expand the record, select the person you wish to make the event against and use the create contact event or other button.



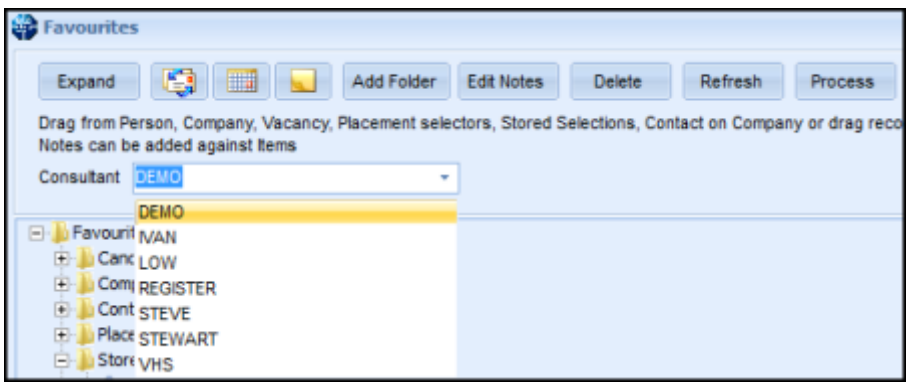
Records can be accessed by double clicking or using the Expand button when selected.

Notes can be easily edited to keep up to date - using the Edit Notes button when selected.

Individual records can be deleted from the lists or entire folders can be deleted from the favourites view - this will just delete them from the favourites folder it will not delete the actual records.

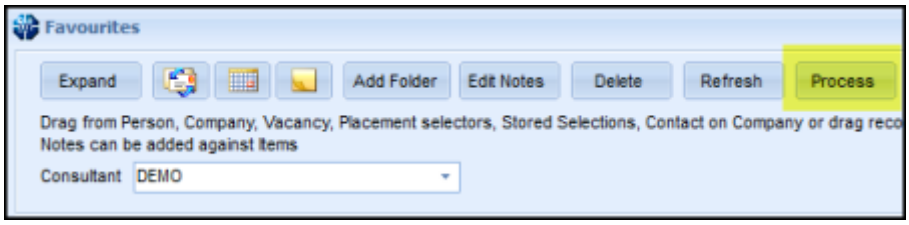
From Release 2.16.6

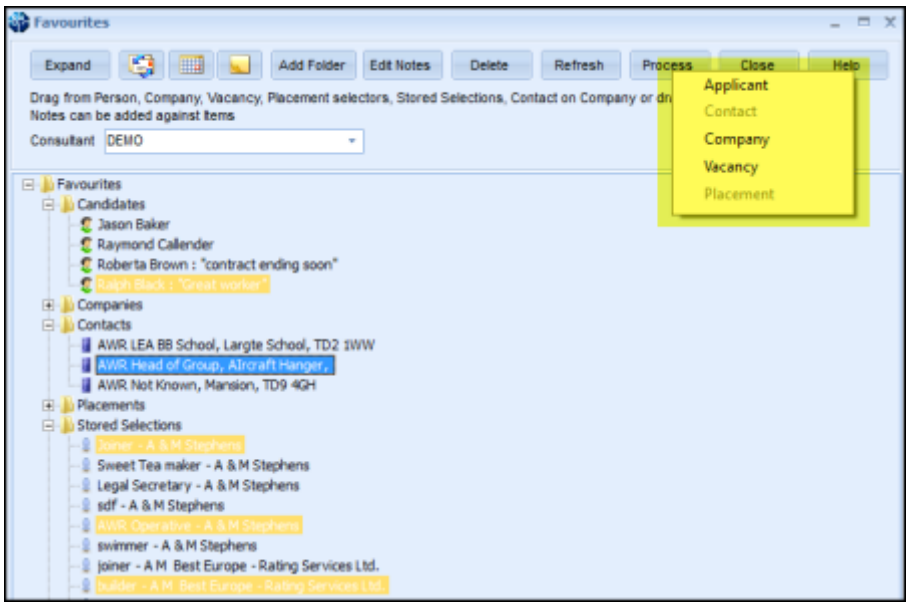
Favourites can be viewed and amended by users with the same Division access.



Records in Favourites can be Processed.

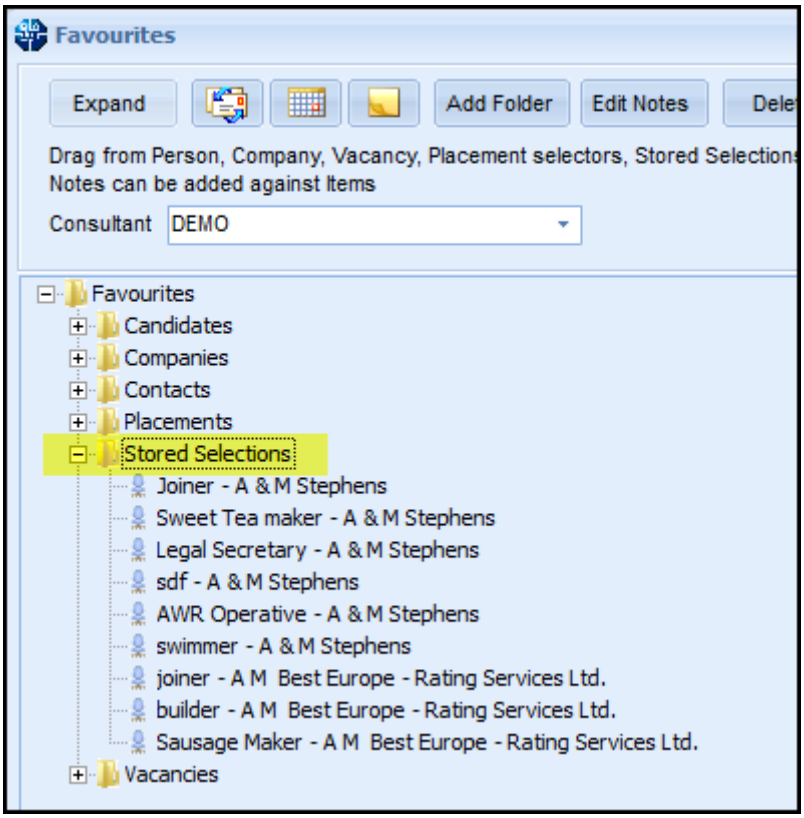
Records stored in Favourites can be selected using Ctrl and/or Shift keys and processed to the relevant selector screen using the Process button.





Stored Selections can be saved in Favourites

Select or create a stored selection in the Person, Company, Contacts and Vacancy. Drag and drop the Stored Selection in the relevant Favourites Folder.

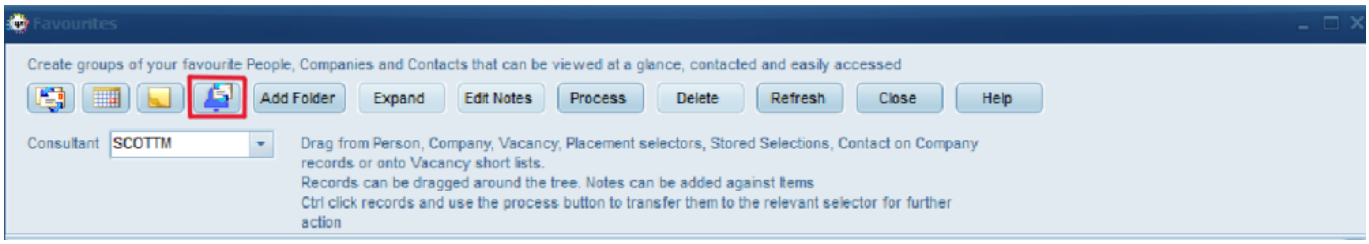


The F2 key can also be used to create contact events for records in folders in Favourites.

Notifications

You can now also send Notifications from the favorites view. The Notifications need to be set up as the following types.

APP_Favourites = Candidate, VAC_ Favourites = Vacancy, COM_Favourites = Contact



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

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=ug14-00

Last update: **2025/11/11 13:43**