

Release 2.20.2

If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

- Features
- Enhancements
- System Administrator
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FEATURES

Options to set Email, Mobile, Address and Postcode as Required fields

An Agency can now ensure that all Person records are entered with agency selected required fields; Mobile, Email, First line of Address, Town and Postcode.

This feature requires administrator set up.

🚱 General Settings							
N	Name, Notes or No person Search Group All \$ Branch All \$						
	No	Group	Name	Value			
	3220	Settings	Person Email Address Required	Y			
	3230	Settings	Person Mobile Required	Y			
	3240	Settings	Person Addr1/Town Required	Y			
	3250	Settings	Person Postcode Required	Y			

Add an Accounts contact from Miscellaneous view

It is now possible to add an accounts contact directly within the company Miscellaneous (often renamed to Account Setup) view rather than having to go back to the Contacts view.

If the accounts contact is not yet in IQX click on the elipses at the end of the Accounts Contact field and use the Add Contact button.

	* Account Code	8081	-
Group Tree	* Accounts Contact	Jeremy Fisher	-
Miscellaneous	Credit Limit	100	
	and the second sec	-	



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Add Contact	Select		
Name	Position	Status	
		Client	
Jeremy Fisher	Boatman Extraordinaire	Client	
Bertha Jorkins	Dezizzer	Client	
Scott Mc		Client	
Mr R. Plumber	Managing Director	Client	
Jemima Puddleduck	Quadters	Client	
Unde Rat	Dirty	Client	
hazel thorburn	Boss	Client	

Add to DeskTop a view for a definable state of Person eg In Registration

Keep track of a group of candidates such as those in registration or not yet compliant by viewing them all in once place on your IQX Desktop.

🕑 Desk Top							
SHELLEY	~			옐 😑	Help		
Daily Work List	Expand Count	Registration After 30/01/201	9 🗸 Filter		Map	Process	
Diary	Name	State Consultant Regist		Mobile	Address	Town	Postcode
Diary List	Alan Armstrong Nela Black	Pre registr SHELLEY 16/04/ Pre registr SHELLEY 13/02/		07764643	123 High Street 1 Upper West Wood W	Dundee Coventry	DD1 1AA CV1 1DA
Inbox	Joe Bloggs	Pre registr SHELLEY 21/02/	2019		1 Lilliesleafway		TD6 9HX
Progress due for Action	Helen Carter Wren Jessica Howden	Pre registr SHELLEY 18/03/ Pre registr SHELLEY 10/04/			312 Commercial Road 11 Kitchen Lane	Thurmaston Anytown	LE4 4EE TD1 3SL
Interviews	Farrah Hunter Jake Ike	Pre registr SHELLEY 20/02/ Pre registr SHELLEY 19/02/			1 High Street	London	E1 6AN
Contact Events due for Caliback	Leah ke	Pre registr SHELLEY 19/02/	2019				
Current Vacancies	Malcolm Malone Mary Malone	Pre registr SHELLEY 19/02/ Pre registr SHELLEY 19/02/			12 Way Down		G1 1DJ
Tracked Vacancies	Molly Malone Mary McCann	Pre registr SHELLEY 19/02/ Pre registr SHELLEY 18/03/					
Placements	Ryan Reynolds	Pre registr SHELLEY 29/01/	2020	07758535	1 High Street	Birmingham	B8 6YH
Reports	Otis Smith Oscar Smyth	Pre registr SHELLEY 19/02/ Pre registr SHELLEY 19/02/					
Backup Log	Petal Strawbridge Jessica Wren Thompson	Pre registr SHELLEY 29/01/ Pre registr SHELLEY 10/04/	2020		1 Upper Westwood 1 Hardthorn Road	Birmingham Galashiels	B12 2HJ TD1 1BE
Tracked Applicant	James Wexler	Pre registr SHELLEY 10/04/	2019		11 Hardthorn Road	Galashiels	TD1 1ED
Charts	Zoe Williamson Hugo Woody	Pre registr SHELLEY 13/02/ Pre registr SHELLEY 10/04/		07707 778	123 High Street 11b Kitchen Lane	Anytown	TD1 1ES TD1 1EZ

All candidates matching the specified state will be displayed and consultants can filter the results, display them on a location map and process them for mail merging as well as making individual contact events. This feature requires administrator set up.

ENHANCEMENTS

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IR35 SDS refinements

Clearer guidance on IR35. If the company is marked as being outside of IR35, upon making a candidate placement you get the following message.

IQX ×
This Company is set as a Small Private Sector Outside IR35 so no SDS can be entered. If this is not corror it must be amended in the Company Miscellaneous view
ок

For auditing purposes, you are able to add an SDS for a candidate for all tax methods using the Add button on the SDS view.

E-Timesheet colour consistency

If used, E-Timesheet colours now show on the vacancy and placement timesheets view as well as on the Temp Desk for easy identification.

CompanyAccount checks when Provisional Timesheet created

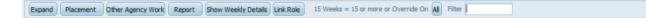
Improvement to the error message when trying to open a Provisional Timesheet if no Company Account record exists. The error will prompt to enter the mandatory fields in the Company Miscellaneous view.



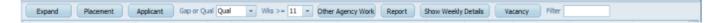
AWR View Filters

We have now added filters on AWR views.

Person - AWR view



Temp Desk - AWR Temps view



Placements - AWR Linked Placements view.

Expand Filter

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Changing an iqxWEB user's Rights is audited in IQX

Whenever you make a change to a candidate, client or consultants iqxWEB rights this is now audited within IQX. This is shown on the audit trail on the specific page (candidate, client, consultant) and also the main audit trail within IQX.

Method of sending an email with safe attachment, using a job that calls SMTP

See Secure Document Sending in IQX help for requirements to utilise this feature.

You do not have permission to view this tab. You do not have permission to view this tab.

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