



# Release 2.23.40

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.

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## FEATURES

### **Process for managing shifts for clients who are Self Bill/Managed through Portals**

**Issue:** The client will send a list of shifts to be invoiced, and will pay only an invoice that matches. The list could exclude a single shift on a timesheet that covers multiple shifts, or could have modified times. Invoice does not need to list each shift so need not be created from Timesheet.

**Solution:** where client is ticked for 'Managed by Portal' to allow from the Accounts view an option to see a list of shifts, add refs and modify times for later comparison with original, select them as being included on client invoice, and then create an Ad Hoc invoice that will exactly match the total of the client invoice/self bill. That will mark the shift as having been linked to an invoice by saving the Ad Hoc Invoice documentID in the table.

Ability to report on shifts that appear to have escaped the invoicing process.

Ability to report on overwritten times and breaks to follow up corrective action with client.



Account Code - 537 5 Live

Save And Close Abandon Update Send Statement Reports New Invoice Address

Miscellaneous Accounts Contact Events Override Alternative Inv Address

Type	Our Ref.	Their Ref.	Date	Amount	Outstanding	Internal	Ac
Invoice	10846	23RFV	19/12/2023	520.00	520.00		53
Invoice	10842	1812202312	18/12/2023	12,000.00	12,000.00		53
Invoice	10840	123	13/12/2023	1,200.00	1,200.00		53
Invoice	10841	132	13/12/2023	12,000.00	12,000.00		53
Invoice		23RFV	05/12/2023	340.00	340.00		53
Invoice	10839	SHELLEY	05/12/2023	510.00	510.00		53
Invoice		111	04/12/2023	2,402.50	2,402.50		53
Invoice	10833	23RFV	23/11/2023	3,914.00	3,914.00		53
Invoice	10834	23RFV	23/11/2023	3,914.00	3,914.00		53
Invoice	10831	23RFV	22/11/2023	3,914.00	3,914.00		53
Invoice	10832	23RFV	22/11/2023	3,914.00	3,914.00		53
Invoice	10830	23RFV	20/11/2023	3,914.00	3,914.00		53
Invoice	10829	23RFV	16/11/2023	5,605.00	5,605.00		53
Invoice	10828	23RFV	03/11/2023	3,536.00	3,536.00		53
Invoice	10827	AAA	30/10/2023	181.00	181.00		53
Invoice	10826	VAR321	18/10/2023	120.00	120.00		53
Invoice	10823	5656756	27/09/2023	7,108.80	7,108.80		53
Invoice	10824	5656756	27/09/2023	7,108.80	7,108.80		53
Invoice	10825	5656756	27/09/2023	7,108.80	7,108.80		53
Invoice	10819	5656756	26/09/2023	373.20	373.20		53
Invoice	10820	5656756	26/09/2023	5,711.40	5,711.40		53

Start Date 20/01/2023

Current Balance 138,053.54

View Transactions

Outstanding All

Expand

Invoice Invoice (T) Credit Note Credit Note (T) Payment Refund Journal Allocation Write Off Invoice Shifts

Temp Shifts link shifts invoice : 537

Vacancy Timesheet Invoice Report Update Close Help

State All Between 01/12/2023 and 14/01/2024 Filter

Select	Client	Vacancy	Temp	Date	From	Override From	To	Override To	Break Minutes	Overrid Break Mini
<input checked="" type="checkbox"/>	S Live	HCA Band 2 1453	Andrade, Kaitlyn	04/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	Andrade, Kaitlyn	05/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	McDowell, Scott	10/12/2023	08:00		17:30		60	
<input checked="" type="checkbox"/>	S Live	HCA Band 2 1453	Porter 01122002, Si...	11/12/2023	08:00	09:00	17:30	18:00	60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	Andrade, Kaitlyn	11/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	Porter 01122002, Si...	12/12/2023	08:00		17:30		60	
<input checked="" type="checkbox"/>	S Live	HCA Band 2 1453	Andrade, Kaitlyn	12/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	Porter 01122002, Si...	13/12/2023	08:00		17:30		60	
<input checked="" type="checkbox"/>	S Live	HCA Band 2 1453	Andrade, Kaitlyn	13/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	McDowell, Scott	14/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	Andrade, Rex	15/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	Porter 01122002, Si...	15/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	Andrade, Kaitlyn	16/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	Blackwell, Monty	16/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	Allison, Michael	17/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	McDowell, Scott	17/12/2023	08:00		17:30		60	
<input type="checkbox"/>	S Live	HCA Band 2 1453	Porter 01122002, Si...	17/12/2023	08:00		17:30		60	

For further information please contact IQX Support.

## Improvements to References on Desktop

To enable users to keep on top of the online references for candidates a new view has been added on the Desktop for monitoring online references. Users can filter on state and date to quickly identify what stage references are at.



Applicant Name	Type	Not Sent	Not Returned	Completed By Referee	Referee Name	Consultant	Reference Origin	Request Created	Approved to Send	Ask Candidate Before Send	Sent to Referee	Last Reminder	Completed by Referee	Process Completed
Kallyn Andrade	Personal				Referee One	SHELLEY	SHELLEY	26/11/23 10:53						
Kallyn Andrade	Professional				Referee One	SHELLEY	SHELLEY	18/12/23 14:59			18/12/23 15:00			
Kallyn Andrade	Personal				Referee Two	SHELLEY	SHELLEY	05/12/23 15:10			05/12/23 15:13			
Kallyn Andrade	Professional				Referee One	SHELLEY	SHELLEY	05/12/23 15:10			05/12/23 15:13		05/12/23 15:20	05/12/23 1...
Alan Arms	Professional				Referee Two	SHELLEY	SHELLEY	05/12/23 15:22			05/12/23 15:36		05/12/23 15:37	05/12/23 1...
Alan Arms	Professional				Referee One	SHELLEY	SHELLEY	05/12/23 15:22			05/12/23 15:36		05/12/23 15:38	05/12/23 1...
Kallyn Andrade	Professional				Referee One	SHELLEY	SHELLEY	18/12/23 14:50			18/12/23 14:58		18/12/23 14:59	18/12/23 1...

## Automatically answering questions to update Compliance Score when document is signed

Only questions can be included in the Compliance Score so to provide visibility over compliance documents when a document has been checked and is signed to say it ok a date question can be automatically answered to update the Compliance Score.

This feature will require your System Administrator to update a new function called Compliance Document Signed, please contact IQX Support for assistance with this.

## ENHANCEMENTS

### Contact events - make "all including system" filter default switchable

The Contact Event Consultant drop down filter now defaults to 'All Including System' rather than 'All Excluding System'.

Alexandra Poppy Abbott

Score 67%

Un-SUBSCRIBED from Marketing mailings

Temp

Division: BR Derby

Name: Alexandra Poppy Abbott

State: Pre-Registration

Available From: 16/11/2016

Personal: Male 75

Home Phone: 01632 491 309

Day Phone: 01632 822 879

Mobile: 07827296450

Headline: Currently Placed at: ABBATAXIS

Alert

Reg. Departments: Drivers (Perm+Temp)

Dept. Questionnaire: Drivers

Key Skill

SM Test

SM Test 2

SM Test 3

Less than 40

Expand Type All Own Type No Consultant All including System Limit To All Process Filter

Consultant	Contact Type	Date	Time	Contact Summary	Link
SCOTTM	Text message	25/08/2023	15:20		
SCOTTM	Scott Test	25/08/2023	15:18	IQ-2629	

This can be reverted back if needed, if this needs to be done please speak to your System Administrator.



## Ad Hoc invoices/Credits - give the user the option of choosing another template

When creating Adhoc invoices you now have the ability to select the invoice template you want to use with it. There is now a dropdown field that allows you to select the template. If there is an invoice override template set this will populate the dropdown as default but can be changed.

## Bank Holidays per Region

Ability to set holiday by Region i.e. Scotland/England.

This can be set up within the Client record > Temp Details > Temp Holiday Code > enter code that is applicable to region.

## P45 options - Remove Composite Company Template

It is now possible when P45ing a candidate to clear the composite company details in addition to bank details.

**Kaitlyn Andrade Leaving**

**Actions Recommended to end an Employment**  
The following are recommended when a Candidate leaves  
ALL Timesheets MUST be fully transferred to Payroll BEFORE completing P45

Last Timesheet Entered	19/12/23 10:26, SN: V5009, by SHELLEY
Future Shifts	23
Open Placements Exist	0
Provisional TS Exist	11
Final Holiday Pay	Click to start TS ...
New Status	Current
Leave Date	09/01/2024
<input type="checkbox"/> Remove From	
Shortlists	<input type="checkbox"/>
Tempdesks	<input type="checkbox"/>
Departments	<input type="checkbox"/>
Future Availability	<input type="checkbox"/>
Clear Bank Details	<input type="checkbox"/>
Composite Co Template	<input type="checkbox"/>

< Back    Finish    Cancel

## Saving files from IQXanywhere - offer default filename

In IQXanywhere when saving a Document the caption of the form (which is the owner name plus the

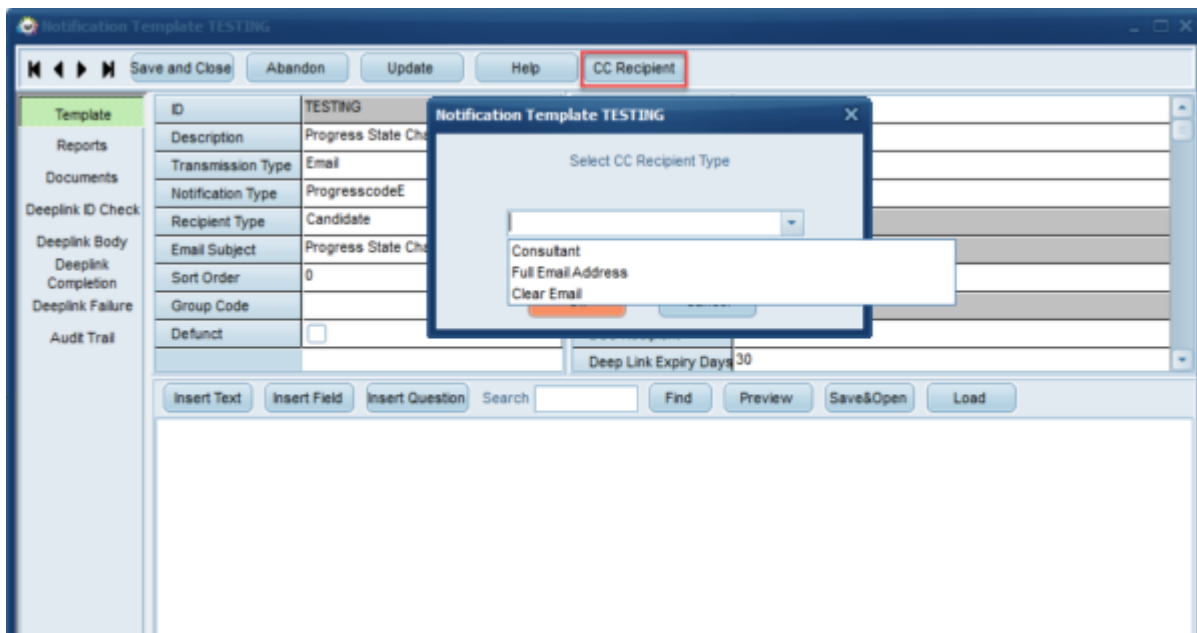
document description) will be offered as the filename instead of a blank.

## Role to limit access to Unsubscribe to Marketing button

New User Layout setting has been added that will allow you to limit who has access to the 'Subscribe/Unsubscribe from Marketing' button. The default is that all users have access to this. In order to disable access for users a System Administrator will need to apply the new layout setting.

## Notification Enhancements

CC in the Consultant or Researcher, etc. You can now add a CC recipient in to a Notification Template in order for them to always receive this when that template is selected. This is particularly useful if you want to CC in the consultant, and you can also enter an email address manually. Note that additional cc recipient fields for Compliance and Resourcer are available for Person and App notifications.



For more information or assistance with setting this up, please contact IQX Support.

Same notification template applying to multiple progress states. A new notification type of ProgressCode has been created so that users can select multiple different progress states and send them a generic message. This is useful if you internally differentiate between progress states for reporting but in essence they are the same thing to candidates.

## Vacancy Shifts - Secondary Agency name

We have added the secondary Agency Name in brackets after the candidate name in the Vacancy Shifts view on the Temp Desk to make it obvious at a glance which clients are Secondary Agency.



## Temp Desk Vacancies view colour in cell for identifying if Candidate confirmed on web.

If set up when a candidate confirms a shift through iqxWEB the background of the cell can be coloured to show on the Temp Desk when a Candidate had confirmed through IQXWeb.

Requires to be set up by System Administrator who should contact IQX support.

## Sales Pipeline Enhancements

In Sales Pipeline a Contact Event is now started and shows on screen as soon as a new record has been created. This is in addition to a Contact Event being started when a record is dragged from one state column to another.

Addition of a filter to find a record quickly.

If no records are selected the Process button will process all the records.

## Contact Position column added when changing client on a vacancy

When on the Miscellaneous view of a Vacancy, if you press on the Change Client/Company button, the Select New Company and Contact form now has a column for the Contact Position. This is also the case if you add a new temp vacancy from the Temp Desk.

The screenshot displays the iqx software interface. On the left, a sidebar menu has 'Miscellaneous' highlighted. The main window shows a form for a vacancy titled 'Temp Vacancy: Scott Test 1 for A & M Stephens'. The 'Company' field is set to 'A & M Stephens'. Below the form, there are buttons: 'Duplicate', 'Make Permanent', and 'Change Company'. The 'Change Company' button is highlighted with a red box. A modal window titled 'Select New Company and Contact' is open in the foreground. It has a search bar with 'Keyname' and a 'Find' button. There are radio buttons for 'By Company' (selected) and 'By Contact'. A 'Select' button is also present. Below these, there is a table with the following columns: 'Contact', 'Position', 'Company', 'Alert', and 'Address'. The 'Position' column is highlighted with a red box.

## Filter on Invoice Temp Timesheets View

A filter has been added to Accounts - Invoice Temp Timesheets view for ease of finding individual



timesheets when you need to do a credit and re-issue.

## Fixes

- Fixed Expense Images added in portal when being viewed on Timesheet.
- When changing Secondary Agency under the person headline the Bank Details are no longer cleared.
- Fixed Timesheet Validation to use Modulus if banksan.dll not present.
- Fixed issues when trying to complete timesheet that needs an override code.
- Fixed accounts issue where imported data was showing as Outstanding because it didn't not come through the allocation process.
- Fixed in IQXAnywhere the Documents attached to invoices using Add Docs was attaching to wrong invoice.
- Fixed issue with Notifications if the Notification Type was QueryBook it wasn't listing all shifts if someone had unavailability entered.
- Person Postcode distance from Vacancy now pulls through into notification when using field {VAC\_POSTCODEDISTANCETOPERSON}.
- Fixed sending notification to Client for multiple temps expecting to send multiple times.
- Timesheet image linking with filenames containing accents, acutes etc, was producing blank PDF invoices. This has now been fixed.
- Fixed the Mongo Db Interface, updated code.
- Fixed duplicating an online reference returning the same urlcode as original.
- Fixed issue with hiding duplicate shifts on Fill Shifts wizard.
- Index added to tempshiftplan.analysiscode.
- Fixed in IQXAnywhere the right click menu options in SQLTool.
- Fixed searches for Perm vacancies using the Desk Type and Shift queries.
- Fixed emails with Digital Signature not showing in Inbox. Readmailitem function (iqemail.pas) wasn't able to read the rtfbody.
- In JobRunner if unable to log into the local email client or the specified SMTP server a following <Else> tag will be executed if present.
- When selecting more than one recipient for notifications the Arrow focus now moves back to top line after sending.
- Fixed broadbean not defaulting to non-European addresses when link enabled.
- Fixed Contacts Selector - Mail Chimp subscription.

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