



## General Settings

These are divided into seven areas. These can be filtered by selecting the appropriate Group.

### Settings

Some of the General Settings: For value enter a Y or N to turn on or off

- **Remove Spaces from Keynames** - This affects the order of selections. Ie. Zoe Yo would be either YOZOE OR YO ZOE. With space means surnames stay together in lists.
- **Show Applicant Number on Grid**
- **Company Person Address** - Do you want to include a Person's Company Position and/or Department in correspondence Addresses when you write letters?
- **Desk Top Diary appearance settings**
- **Person States Treated as Current** - governs appearance on the Person Selector
- **Allow a consultant to be allocated to a Company**

### (2.16.4+)

- **Make Registration Numbers Read only**
- **Show temps by default in company contact view**

### Terminology

It is possible to configure the terminology to match the way your Company uses it.

**For example:** If you refer to your Client Companies as 'Businesses' set the singular of Company to Business and the plural to Businesses. Then all labels in the program which used the word 'Company' will be changed to use 'Business'.

**Vacancy Notes** - can be renamed, eg Web Description **Secondary Notes** - If this field is filled an extra Notes view with that heading will appear on the Person Details form. The view could be used for bulletin notes, general description, etc.

### Colours

Colours for the forms can be changed for the database as a whole, but not for individual users. Use the Get Colour button to select a new shade.

### (2.3.4+)

Background colours can be changed according to the record state: [click here](#)

Company or person font colours can be changed according to the record state: [click here](#)



## Accounts

Settings for the use of the Sales Ledger e.g. for Default credit days and the maximum allowed.

## Temps

Settings for Temps Payroll behaviour, Timesheet behaviour, restrictions on editing, switching on and off various functionality.

## Email and Telephony

To make the best use of the electronic capabilities of an Agency the IT manager must set up the appropriate information. These should be set under the supervision of the IQX Installation staff They control emailing, faxing by email and SMS messaging by email.

## Switchable Fields

It is possible to add an extra three columns to the Company, Person and Vacancy selectors. Each column is defined here. This should be done under the supervision of the IQX Installation staff.

## Programmable Buttons

### (2.16.4+)

Custom buttons may be added in: Vacancy, Person, Recipient, Company and Contact views. To add a button go into General Settings, and select **Programmable Buttons** in the Group drop down. The caption specifies what will be displayed on the button label. The script is what will be executed when the button is clicked.

If you need help programming the button please contact IQX support. This may be chargeable.



No	Group	Name	Value	Notes
1	Programmable B...	Vacancy Caption		If specified, creates a button on the Vacancy to execute the ...
2	Programmable B...	Vacancy Script		paste to insert multi-line scripts, edit externally
3	Programmable B...	Person Caption		If specified, creates a button on the Person to execute the s...
4	Programmable B...	Person Script		paste to insert multi-line scripts, edit externally
5	Programmable B...	Recipient Caption		If specified, creates a button on the Recipient to execute the ...
6	Programmable B...	Recipient Script		paste to insert multi-line scripts, edit externally
7	Programmable B...	Company Caption		If specified, creates a button on the Company to execute the...
8	Programmable B...	Company Script		paste to insert multi-line scripts, edit externally
9	Programmable B...	Contact Caption		If specified, creates a button on the Company to execute the...
10	Programmable B...	Contact Script		paste to insert multi-line scripts, edit externally

### Terminology for Entered label on completed timesheets

#### (2.16.6+)

The Terminology For the Entered label on completed timesheets can be customised.

The terminology can be changed via Maintenance - General Settings - Settings - Terminology - 790.

790 Terminology	Vacancy Extra Notes	Extra Notes
790 Terminology	Timesheet Complete Entered By	Entered

Open a completed timesheet to view the revised terminology.

Linked Timesheets	Job Title	Sambucco Taster
Questionnaire	References	PO NumberEE
	Timesheet Number	V3106
	Period	W 201549
	Dates	From 29/02/2016 to 06/03/2016
	Payroll Company	1
	Analysis Code	E4
	Entered	09/06/2016 12:17 By IVAN
	Processing Details	
	Invoice Number	

### Ability to Block Extra States of Clients

#### (2.3.5+)

A new switch has been added to allow the blocking of certain Client States from the pick lists when adding a new vacancy.

Then access - Maintenance - General Settings - Switchable Fields - No 2800 and insert the Company states that will be blocked.



General Settings				
Name or Notes		Search	Group Switchable Fie	Branch All
		Get Colour	Save and Close	Abandon Update Help
No	Group	Name	Value	Notes
2760	Switchable Fields	Placement Selector Switchable Field ...		
2770	Switchable Fields	Placement Selector Switchable Field ...		
2780	Switchable Fields	Placement Selector Switchable Field ...		
2800	Switchable Fields	States to exclude from new temp vac... C		List of client states, no separators, to be excluded when selecting new temp vacancy
2850	Switchable Fields	Delete in bulk on Diary List	Y	

The Company State codes are in Maintenance - Agency Setup - Company States.

## Maintenance - Agency Setup

Save And Close

Abandon

Update

Boiler Plate Text

E-mail Signatures

Contact Event Types

Contact Event Outcomes

Sources

Company States

Person States

Add

Delete

State

Name

Order

Grid Order

P

Prospect

10

10 P

C

Client

20

20 C

I

Invoice Address

25

25 I

S

Supplier

30

30 S

A

Secondary Agency

35

35 S

.

Archived

40

40 C

From:

<https://iqxusers.co.uk/iqxhelp/> - iqx

Permanent link:

[https://iqxusers.co.uk/iqxhelp/doku.php?id=sa\\_maintenance\\_5](https://iqxusers.co.uk/iqxhelp/doku.php?id=sa_maintenance_5)

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