

Favourites

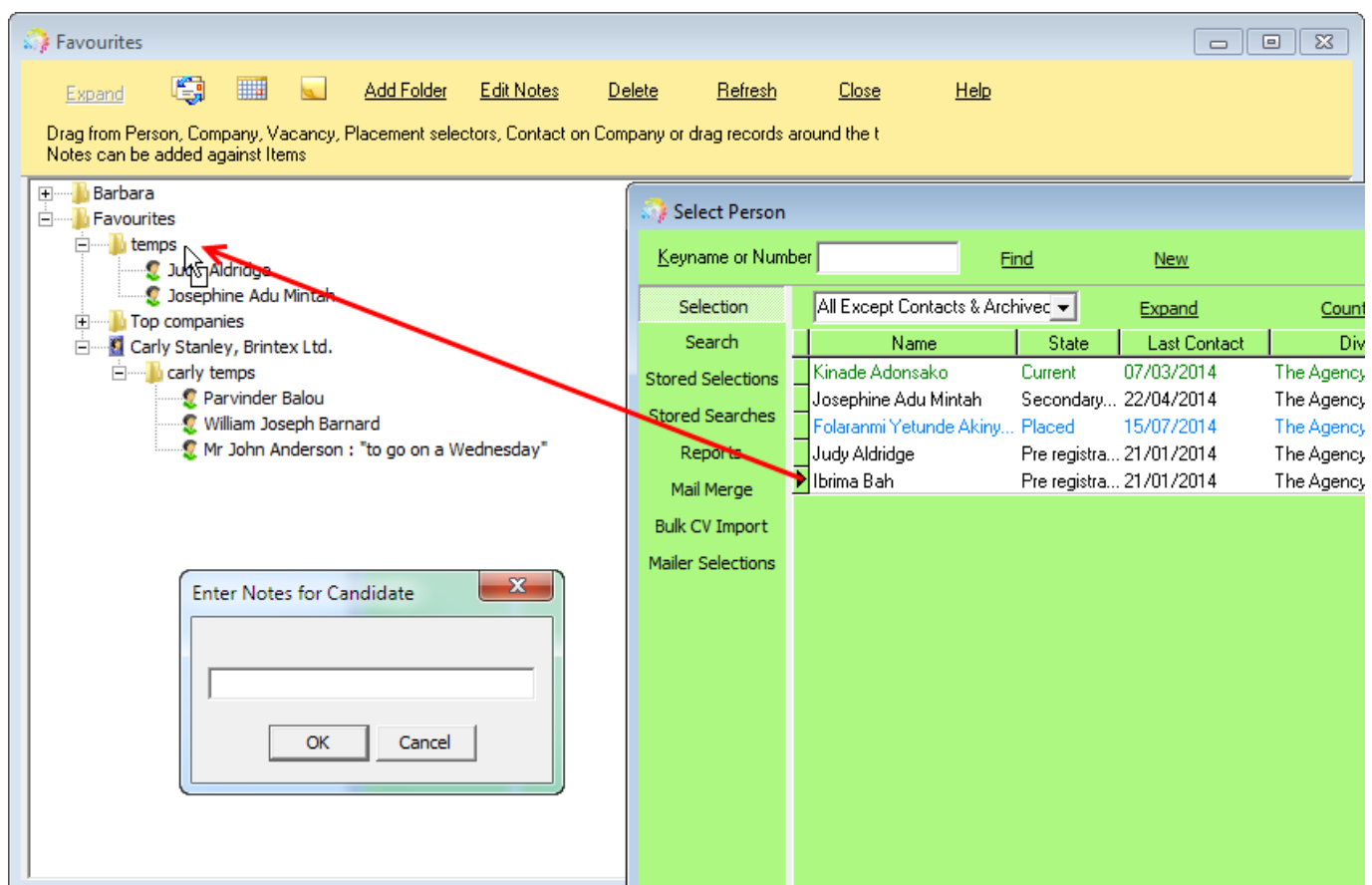
From version 2.2.9.17.



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.



The screenshot shows the 'Favourites' window with a toolbar containing buttons: Expand, Add Folder, Edit Notes, Delete, Refresh, Close, and Help. Below the toolbar is a yellow instruction bar: 'Drag from Person, Company, Vacancy, Placement selectors, Contact on Company or drag records around the t Notes can be added against Items'. The main area displays a tree view of folders: Barbara, Favourites, temps, Top companies, Carly Stanley, Brintex Ltd., and carly temps. A red arrow points from the 'temps' folder to the 'Select Person' dialog box. The dialog box has a 'Keyname or Number' field, a 'Find' button, and a 'New' button. Below these is a table with columns: Selection, Name, State, Last Contact, and Div. The table lists several records, including Kinade Adonsako, Josephine Adu Mintah, Folaranmi Yetunde Akiny..., Judy Aldridge, and Ibrima Bah. A red arrow points from the 'Select Person' dialog box to the 'Enter Notes for Candidate' dialog box, which has a text area and 'OK' and 'Cancel' buttons.

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.



Select Company

Find Keyname Key Word Companies Contacts New Close Help

Clients and Prospects Expand Count Contact Tree Map Update

Filter Quick Lookup Process

Company	State	Last CE	Last PI Start Date	Code	Alert	Address
A & M Stephens	Client		20/12/21	A1 XMS001	Hi	19 Albany Street
A M Best Europe - Rating	Client		22/04/21	A3 X21321	Viola test Morgan Spence	12 Arthur Street
ABBA Ltd	Client		29/11/21	A1 XBBA01		SM Test
ABBA Ltd	Client			A1 XBBA01		SM Test 2
ABBA Ltd	Client		10/02/20	A1 524	Test Alert SM	63 New Street
ABBATAXIS	Client		12/04/21	A1 X00507		63 New Street
ABC Contract Services Ed	Client		17/04/14	A1 XBC001		18 Corstorphine Road
ABC Contract Services W	Prospect			A1 XBC001		Unit 6, Wolsey Park
ABC Contracting Services	Client		16/09/11	A1		41a Thistle Street Lane S We

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

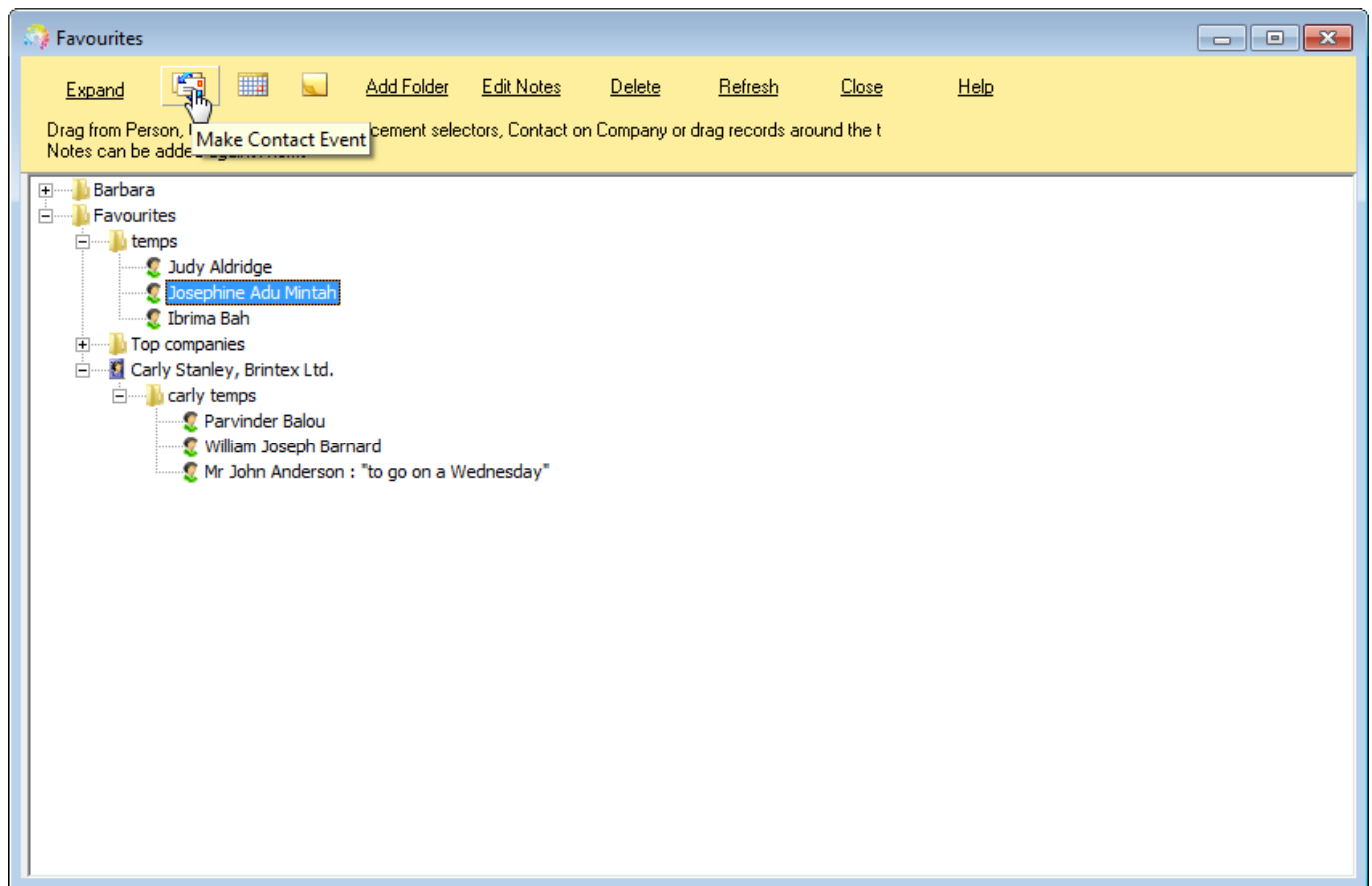
Select a Favourites Folder

Folder

Notes

Ok Cancel

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.



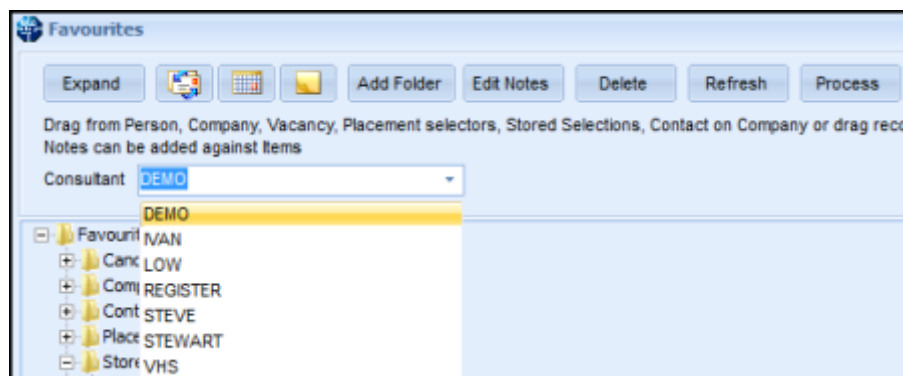
Records can be accessed by double clicking or using the Expand button when selected.

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

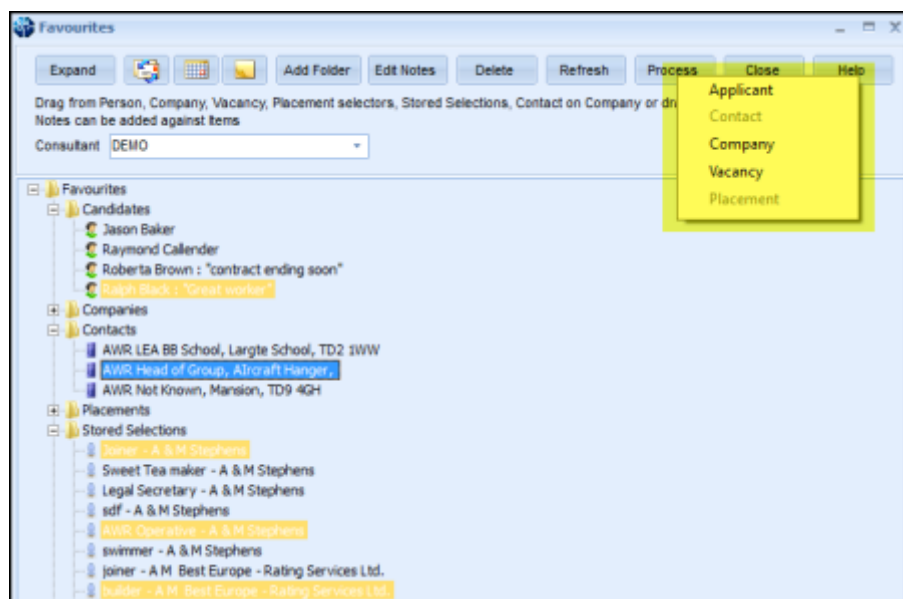
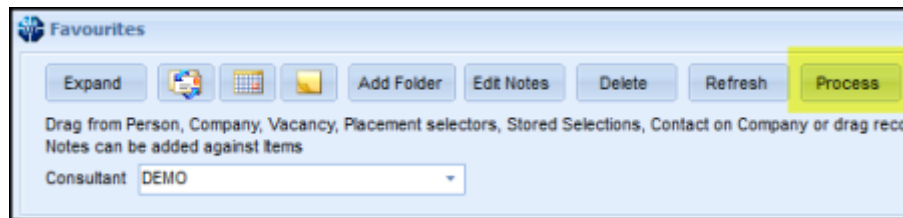
Favourites can be viewed and amended by users with the same Division access.



Records in Favourites can be Processed.

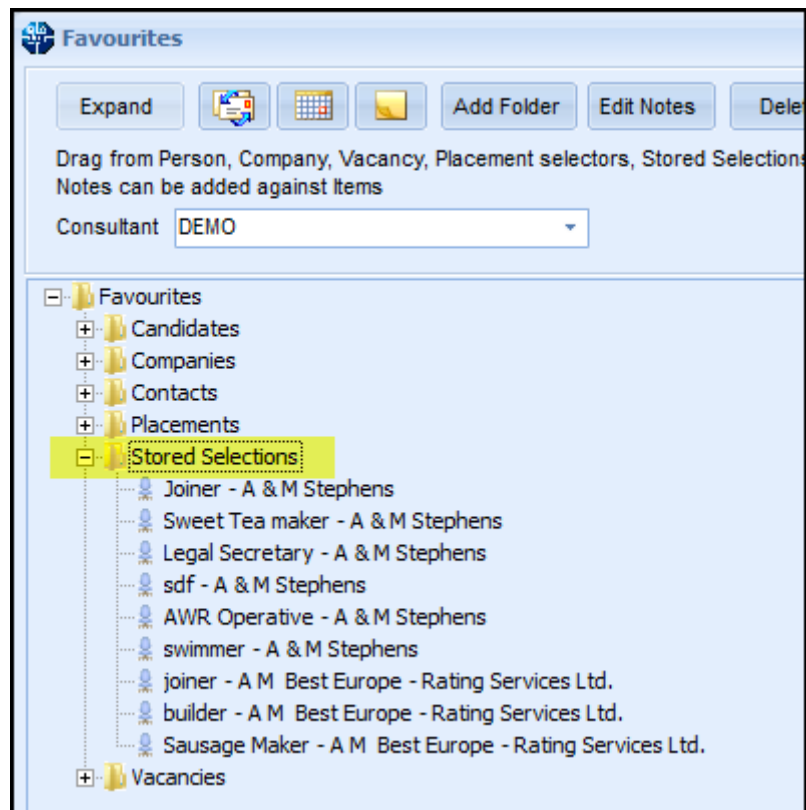


Records stored in Favourites can be selected using Ctrl and/or Shift keys and processed to the relevant selector screen using the Process button.



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.

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

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

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