



# Shift Confirmations

## How to confirm shifts

### Standard Method

For a group of shifts - On either the **Temp Desk** or the **Vacancies** Diary view - click the **Confirm** button.

- The **Temp Confirmed** column could already be ticked, depending on the Template setup.
- Use **F2** or click the **make contact event** button on the top menu bar to start a contact event and select the client as recipient, confirm the candidate with the client.
- Tick the **Client Confirmed** boxes. Move to the next week, if appropriate, and complete.
- **Save and Close**. The shifts will now be bordered in black to show completely confirmed.
- To **confirm an individual shift** from the vacancy Diary view - RIGHT click on the shift and select Client confirm.

### With Notifications Set Up

The Notification system provides a mechanism for clients, candidates and secondary agencies to be notified of key events relating to vacancies, placements and shifts by means of HTML email and SMS text.

Notifications can be sent automatically on booking a shift, after selecting your temps when you press the finish button a new window will open with the confirmations in them; one for the Client confirmations and one for the Temp confirmations.

The image shows two side-by-side screenshots of email templates generated by the iqx system. Both windows have a title bar and standard window controls. The left window is titled "Notify Client about Shift Confirmation" and the right is "Notify Candidate about Shift Confirmation". Both windows have a "Template" dropdown menu set to their respective names, a "Create Contact Event" checkbox (checked), and buttons for "Send", "Send All 2", "< Previous", "Next >", "Refresh", and "Expand". Below these are sections for "Recipients" (with "Add" and "Remove" buttons) and "Attachments" (with "File", "Document", and "Remove" buttons). The "Subject" field is also present. The main body of the email template is visible in both, showing a greeting, company name, candidate name, shift dates and times, and a sign-off from Shelley Hunter, Consultant.

**Left Window: Notify Client about Shift Confirmation**

Template: Notify Client about Shift Confirmation ☒ Create Contact Event

Buttons: Send, Send All 2, < Previous, Next >, Refresh, Expand

Recipients: Brayden\_Macdonald@iqx.co.uk

Attachments: File, Document, Remove

Subject: Notify Client about Shift Confirmation

Tillie

Dr Foster Ltd.

Inaaya Richard will be working as Social Worker

Monday 06/02/2017 08:00 – 17:30  
Tuesday 07/02/2017 08:00 – 17:30

Kind regards

Shelley Hunter  
Consultant

**Right Window: Notify Candidate about Shift Confirmation**

Template: Notify Candidate about Shift Confirmation ☒ Create Contact Event

Buttons: Send, Send All 2, < Previous, Next >, Refresh, Expand

Recipients: Inaaya\_Richard@iqx.co.uk

Attachments: File, Document, Remove

Subject: Notify Candidate about Shift Confirmation

Inaaya

You will be working as Social Worker

at Dr Foster Ltd., Jarvis House, 12 Smithfield Street, London, EC1A 9LA

Monday 06/02/2017 08:00 – 17:30  
Tuesday 07/02/2017 08:00 – 17:30

Kind regards

Shelley Hunter  
Consultant

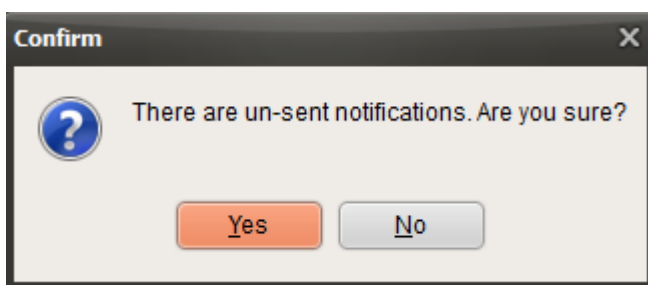
You can press Send All and send the confirmations as they are or you can make changes to individual



notifications and then send those. (Note if you make changes to the notification but don't send it these changes will be lost when you move on to the next one.)

- Template: If you have more than one template set up you can select which one you want to use from the drop down.
- Create Contact Event: if this box is ticked a contact event with the details of the notification will be recorded against the vacancy and linked to either the temp or the client contact
- Send: will send just the one notification that is visible in the window
- Send All: will send all of the notifications as they stand with no changes
- < Previous: used to scroll through the notifications
- Next >: used to scroll through the notifications
- Refresh: keeps the notifications open but DOES NOT save any changes that have been made. If you have made changes to a notification you will need to send it before you can browse to the next one otherwise your changes will be lost.
- Expand: Company, Vacancy, Placement or Person, useful for checking details
- Add: use to add in an additional email address to receive a copy of the notification
- Remove: click on the email address you wish to remove to highlight it then press remove. Useful if your contact has more than one email address but you only want to send them one notification.
- File: you can browse to and select a file that is saved on your computer or network
- Document: use to pick up documents that have been saved on the documents tab of the person, company, placement or vacancy
- Remove: click on the document you want to remove to highlight it and remove it
- Edit: will allow you to amend the body text of the notification and the subject line. Note the default for the subject line

If you try and close the window and you haven't sent all of the notifications you will receive this warning message:



Once all notifications have been sent the window will automatically close. The process can then be repeated for the next vacancy.

Alternatively you can send confirmations from the Vacancy tab of the Temp Desk. Open the temp desk and on the vacancies tab ensure the correct vacancy is selected (click on the vacancy line and the black arrow will be pointing at the selected vacancy). Press the 'Confirm Shifts' button.



**Temp Desk**

Desk: Social Work View: Weekly Shift Year: 2017 Week: 45 Ends 11/02/2018 (Current) Process Update Close Help

Vacancies Search Expand Add Show: ☐ Shifts in Week ☒ Current State ☐ Unfilled in Week Add Shifts Fill Shifts Confirm Shifts Copy Shifts Enter Timesheet

	Job Title	Company	Monday 05/02/2018	Tuesday 06/02/2018	Wednesday 07/02/2018	Thursday 08/02/2018
Temp	Care Manager	A & M Stephens	1P 1B			
Placements	General Assistant	A & M Stephens	3P	2P	1P	1P
Vacancy	Care Assistant	A M Best Europe - Rating ...				
Shifts	General Assistant	A M Best Europe - Rating ...	1P	1P	1P	
Shifts	Care Manager	Bartley Lodge				
Timesheets	Social Worker	Dr Foster Ltd.				
Cascades	Family Support Worker	Finsbury Ltd.				
AWR	Family Support Worker	Finsbury Ltd.				
AWR Checking	Nursery Assistant	National Express Group PLC		1P		1P
TS Query Log	Project Manager	Perivan Ltd.				
Expiry Dates	Social Worker (2+)	Saunderson House Ltd.				
Images	Education Welfare Officer	Westbury				
Reports	Childcare	Whessoe PLC				

If no shifts appear press the include confirmed button (some shift types are set up so that the client or the temp does not need to confirm them). You will see a list of shifts for that week (the date is shown at the top left of this screen). If you wish to confirm shifts for more than 1 week change the number of weeks in the Week(s) field).

**Shift Confirmations for General Assistant, A M Best Europe - Rating Services Ltd.**

Week Beginning: 05/02/2018 Week(s): 1 Applicant Save and Close Include Confirmed Select All None Abandon Select All None SMS / Email Query Select All None

Our Ref.	Date	From	To	Description	Person	Cancelled	Cancel Reason	Client Confirmed	Confirmed With	Temp Confirmed	Their Ref.	Grade	Note	Send Query	Notify Client	Notify Temp
10...	Mon 05/02/2018	08:00	17:30	Day	Haynes, Leila	<input type="checkbox"/>		<input type="checkbox"/>		<input checked="" type="checkbox"/>			Not read...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10...	Tue 06/02/2018	08:00	17:30	Day	Hunter, Jess	<input type="checkbox"/>		<input type="checkbox"/>		<input checked="" type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10...	Wed 07/02/2018	08:00	17:30	Day	Hunter, Jess	<input type="checkbox"/>		<input type="checkbox"/>		<input checked="" type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10...	Fri 09/02/2018	08:00	17:30	Day	Hinton, Annalise	<input type="checkbox"/>		<input type="checkbox"/>		<input checked="" type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If the shifts that you want to send a notification for have already been ticked as Client Confirmed or Temp Confirmed either untick the box and retick or press the None button above the column then Select All if you want to send for all. This will tick the corresponding box in the Notify Client or Notify Temp column.

If a notification has already been sent for this shift then the background of the Client Confirmed or Temp Confirmed will be coloured the same colour as the Temp Desk. Notifications can be resent by unticking and re-ticking.

When you press Save and Close a new window will open with the confirmations in them; one for the Client confirmations and one for the Temp confirmations. The process for sending is the same as above.

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Last update: **2022/06/06 09:39**

