

Retainers

Colleague 7 now includes the ability to create Retainer records against Requirements catering for **Executive Search** processing.

This functionality is enabled for all users to view via Global Settings (Admin > Global Settings > Requirement > Allow the use of Retainers in Requirements)

| | | |
|-------------|--|-----------|
| Requirement | Allow the use of Retainers in Requirements | Yes |
| Requirement | Default for Use Retainers in Requirements | Yes |
| Requirement | Retainers Tab Label | Retainers |

Alternatively it can be enabled individually via User Settings (User Settings > Requirement > Allow the use of Retainers in Requirements)

There is also a Global and/or User Setting to set whether the option to 'Use Retainers' on a Requirement is set to Yes or No by default.

Access to Add/Edit Retainers is granted via a User Group Permission (Requirement > Add/Edit Retainers)

| Permission Groups | Permission | Description | Access |
|-------------------|-----------------------------------|--|-------------|
| Admin | Enable Post to Broadbean | Grants the ability to post a Requirement to Broadbean | Full Access |
| Back Office | Add/Edit Retainers | Grants the ability to edit Retainers | Full Access |
| Calendar & Tasks | Show Job Boards | Grants access to view posted Adverts and responses from the Requirement record | Full Access |
| Candidate | Edit Requirement Candidate Source | Grants the ability to Edit a Requirement Candidates Source | Full Access |
| Company | Edit Requirement Source | Grants the ability to Edit an existing Requirements Source | Full Access |
| Contact | | | |
| Global | | | |
| Homepage | | | |
| Placement | | | |
| Requirement | | | |

With these settings are enabled, on a Requirement, an additional Yes/No field called 'Use Retainers' will be available, along with the 'Owning Company' lookup.

| | |
|----------------|------------------|
| Use Retainers | Yes |
| Owning Company | Owning Company 1 |

Retainers

With the 'Use Retainers' field set to 'Yes', this will add a 'Retainers' tab and 'Back Office' tab to the Requirement.

Show 10 entries

| Stage | Description | Units | Count | Invoice Value | Reference | PO Number | Document | Expected | Completed | Invoice Id | Invoice Date |
|-----------|-----------------------------------|-------|-------|---------------|-----------|-----------|----------|-------------|-----------|------------|--------------|
| Longlist | Longlist of Initial Candidates | 5 | 0 | 1500 | | | | 30 Jul 2022 | | | |
| Shortlist | Shortlist of Qualified Candidates | 5 | 0 | 500 | | | | 10 Aug 2022 | | | |
| CV Sent | Candidate CVs Sent to Client | 3 | 0 | 2000 | | | | 31 Aug 2022 | | | |
| Interview | 1st Interviews Arranged | 2 | 0 | 500 | | | | 1 Sep 2022 | | | |
| Placed | Candidate Offer Accepted | 1 | 0 | 1000 | | | | 12 Sep 2022 | | | |

Showing 1 to 5 of 5 entries

Previous 1 Next

The 'Back Office' tab will contain Invoice Details brought across from the associated Company record. These fields are required in order to add Retainers as they are a mandatory component to invoice generation.

With the Back Office details entered, on the Retainers tab, a user can then click to 'Add Retainer Item'. This will open a new retainer form giving the user the ability to enter:

- **User** - Owner of the Retainer
- **Description** - Title of the agreed Retainer
- **Stage** (Longlist, Shortlist, CV Sent, Interview, Offer, Placed)
- **Units** - Number of agreed Candidates to achieve Retainer
- **Invoice Value** - Value of Retainer
- **Reference** - Any unique reference number associated with Retainer
- **PO Number** - Dropdown list of PO Numbers linked with Company
- **Expected Date** - Target Date or agreed Completion Date to deliver Retainer
- **Mark As Complete** - Yes/No

Once the Retainer is created, you will also be able to upload a document to the Retainer item.

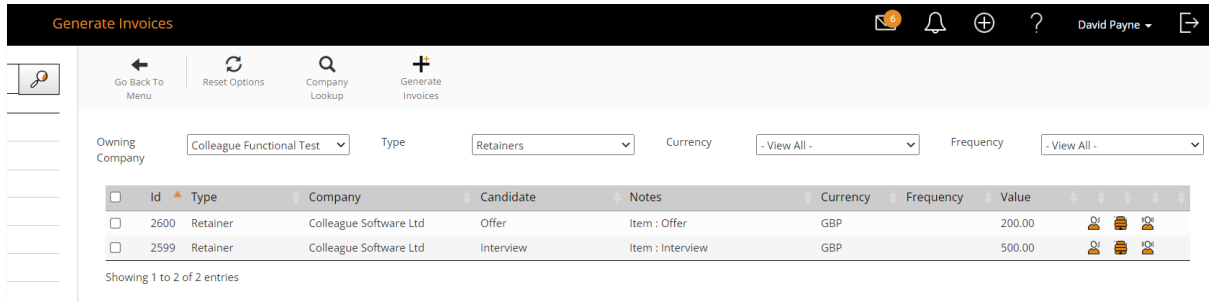
The Retainer will also advise a current count based on the number of Candidates that have been processed against the specified stage.

As workflow is then run against the Requirement, depending on the 'Stage', it will update the associated Retainer. For example if you were to send six Candidate CVs from the Requirement, on a retainer using the 'CV Sent' stage it will advise: '6'.

Once the count on the relevant Retainer has reached an agreed total number of units the Retainer is automatically marked as complete.

Retainers

A completed Retainer is then accessible within the Back Office area, under Generate Invoices against a new type: 'Retainer'.



The screenshot displays the 'Generate Invoices' interface. At the top, there are navigation icons and the user name 'David Payne'. Below this, there are four main action buttons: 'Go Back To Menu', 'Reset Options', 'Company Lookup', and 'Generate Invoices'. The main content area features a filter bar with the following settings: 'Owning Company' set to 'Colleague Functional Test', 'Type' set to 'Retainers', 'Currency' set to '- View All -', and 'Frequency' set to '- View All -'. Below the filter bar is a table with the following data:

| <input type="checkbox"/> | Id | Type | Company | Candidate | Notes | Currency | Frequency | Value | | | |
|--------------------------|------|----------|------------------------|-----------|------------------|----------|-----------|--------|--|--|--|
| <input type="checkbox"/> | 2600 | Retainer | Colleague Software Ltd | Offer | Item : Offer | GBP | | 200.00 | | | |
| <input type="checkbox"/> | 2599 | Retainer | Colleague Software Ltd | Interview | Item : Interview | GBP | | 500.00 | | | |

Showing 1 to 2 of 2 entries

A generated invoice from a Retainer record will contain the Retainer Description, a list of the associated Candidates linked with the Retainer and the Invoice value. Other elements such as Tax and the Invoice Contact details are pulled from the Back Office tab of the Requirement.