



Release Notes

Build: 17.04.02

Colleague Software Ltd

Date Created: 03/05/17

Colleague 7 Release Notes - 17.04.02

1. Introduction

The document communicates the new features and changes in this release of Colleague 7.

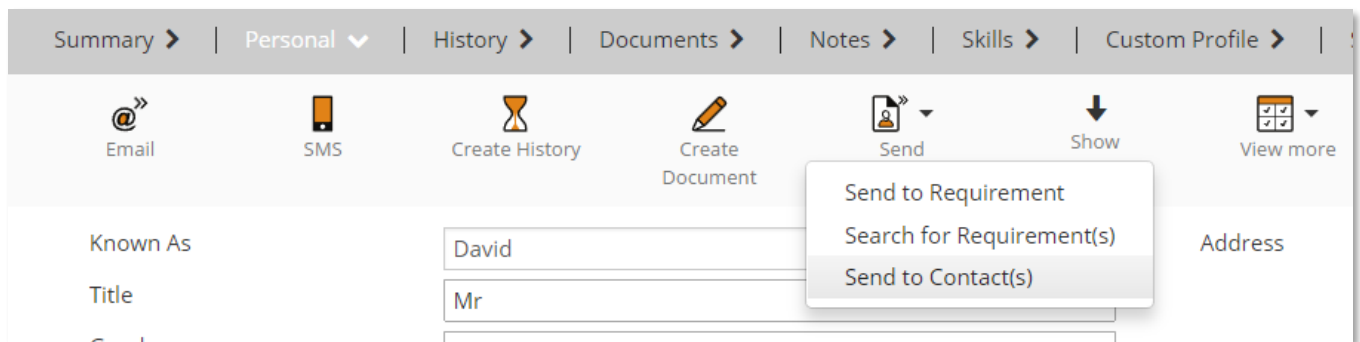
2. About This Release

Sprint Goal: Initial works to enhance the connectivity between records. Starting with a Speculative CV Send Out process that tracks and summarises the activity against all associated entities and also to finalise the workflow of updating existing records via the parser.

3. New Features

3.1 New Speculative CV Send Out Workflow

From within a candidate, there is an option via the 'Send' button to 'Send to Contact(s)'.



This has now been enhanced to track which contacts the candidate has been sent to. The workflow begins by requesting a 'Search Name' - this defaults to the candidate name and today's date:

Search Name

✓

✗

OK

Cancel

Press OK and this will launch a Contact Search linked with the Candidate. Here you can enter the criteria needed to build your list of Contacts:

Candidate > | Company > | Contact > | Requirement >

Send Criteria Saved Searches View Records View Text Selected Items Add Combine Results Options Hide Results Found: 10 records

Search for contacts to send David Payne to. Once the contacts are selected in the results list, click 'Send' to send the candidate OK

Show Selected All

Show 10 entries

Contact Id	Forenames	Surname	Email Address	Direct Number
19	David	Lewis	DavidLewis@colleaguestestdb.eu	
33	David	Patton	DavidPatton@colleaguestestdb.eu	
41	David	Holmes	David Holmes @colleaguestestdb.eu	0845 481 0141
46	David	Shan	David Shan @colleaguestestdb.eu	
48	David	Bullock	David Bullock@colleaguestestdb.eu	
60	David	Brand	DavidBrand@colleaguestestdb.eu	
90	David	Lewis	DavidLewis@colleaguestestdb.eu	
104	David	Payne	david.payne@colleaguesoftware.com	
167	David Michael James	Thomas	David Michael JamesThomas@colleaguestestdb.eu	
168	David Michael James	Thomas	David Michael JamesThomas@colleaguestestdb.eu	12345678904

Showing 1 to 10 of 10 entries (1 selected) Previous 1 Next

Pressing 'Send' will launch the email function giving you the ability to email the contacts and include a link to the Candidate's CV:

Candidate > | Company > | Contact > | Requirement >

Send Criteria Saved Searches View Records View Text Selected Items Add Combine Results Options Hide Results Found: 10 records

Send Email

Send Preview Discard

To... david.payne@colleaguesoftware.com (David Payne)

Cc... Click here to add a new email address

Template Selection - Select a Template from the list -

Merge Field Selection - Select a Merge Field from the list -

Subject Contact Default Email Subject

Inline CV Link Candidate: David Payne (369) Document: CV
Candidate: David Payne (369) Document: Profile
Candidate: David Payne (369) Document: Example CV

Attachments

On returning to the Candidate, on the Spec CVs Sent tab, you will find a log of the event with access to a Notes area, the Contact Search result (with criteria) and the Contact:

Summary > | Personal > | History > | Documents > | Notes > | Skills > | Custom Profile > | Situation > | Checklist > | Spec CVs Sent >

Email SMS Create History Create Document Send Show Ownership View more

Show 10 entries

By	Name	Company Name	Contact Name	Date Sent	Notes
David Payne	Daniel Woodsford	Wed May 03 2017	DP Publications Limited	David Payne	3 May 2017 Chase Up 04.05.17

Showing 1 to 1 of 1 entries Previous 1 Next

This is also replicated on the Contact and Company records.

Included on all tabs will be the option to Create New Requirement. When created, the requirement will be preloaded with the Contact and Company. It will also automatically associate the candidate with the requirement and the 'Date Sent' date will be the original date the candidate was emailed to the contact:

3.2 Parsing – Attach Document When Updating Existing Record

When parsing a document against an existing candidate, the user will now be able to attach the document to the candidate:

Access to the Candidate record is also now via the 'Go to Candidate' icon.

4. Bug Fixes

4.1 Placement – Add Formatting to Numeric Fields

Decimal field values are now rounded to 2 decimal places for placements and offers:

- Salary
- Placement Fee
- Charge Rate
- Pay Rate
- Margin

Basic | Additional | History | Documents | Notes | Custom Fields | Checklist

Email Create History Create Document View Requirement View more

Ltd Company Calculator : Markup

Calculate Accept Cancel

Charge	1200.00
Pay	1100.00
Markup %	8.33
Gross Profit	0.00

The number of decimal places is based on a data dictionary setting which can be between 0 and 4 decimal places.

4.2 If Zero Is Entered Into The 'Contact ID' Field, No Results Are Returned

A bug has been fixed where entering zero into the contact id field on the contact selection screen would bring back zero results, even if results were expected due to other criteria. This has also been applied to all other selection screens.

4.3 Links Are Not Saved From Social Media Page When They Don't Contain 'http'

New social media links can now be added without requiring http:// or https:// at the start of the URL.

Revision History

Version	Date	Summary of Changes	Author
1.0	03/05/17	Initial draft.	David Payne
1.1	03/05/17	Minor Amendments and Screenshots	David Payne