



## Release Notes

Build: 18.05.01

Colleague Software Ltd

Date Created: 16/05/18

## Colleague 7 Release Notes - 18.05.01

### 1. Introduction

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

### 2. About This Release

Sprint Goal: To complete the Back Office project with the inclusion of Payment and Invoice Details held against the Placement record.

### 3. New Features

#### 3.1 PBI 38049 - Colleague 7 - V6 Back Office Integration (Placement)

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State: Done

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Type: Enhancement

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User Notes: BackOffice information against a Placement record is now stored in Colleague7.

As part of implementing this feature, there is a new User Group Permission in Colleague7 called "Placement - Back Office".

- When this is set to "No Access", then users will not be able to view/edit Invoice and Payment Details on a Placement.
- When set to "Full Access", then the Back Office Details can be accessed on a Placement record via the "Back Office" tab

When an Offer is Accepted, the Back Office details will be populated with the Payment Details from the Candidate and the Invoice Details from the Company. These fields can then be edited as they would on the Candidate and Company records.

These fields can also be made mandatory in the Mandatory Fields section of the Admin area.

When a Placement is advanced to Level 1 Authorisation, then all fields except the Back Office fields will be made read only.

When a Placement is advanced to Level 2 Authorisation, then if any Back Office fields are mandatory but empty then an alert will be displayed explaining that the Placement cannot be Authorised.

When a Placement is Level 2 Authorised, then the Back Office fields are also made read only.

Basic > | History > | Documents > | Notes > | Custom Fields > | Checklist > | Back Office ▾ |

Email
 Create History
 Create Document
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### Invoice Details

Invoice Company \*

Colleague Software Limited

Q X

Registration No. \*

test reg number

Vat No. \*

test vat number

Account Reference \*

test account reference

Tax Code \*

20 ▾

Invoice Address \*

The Control Tower, Witchcraft Way, Rackheath, Norfolk, United ▾

Invoice Contact \*

David Payne

Q X

Invoice Method \*

Company ▾

Invoice Frequency \*

Monthly ▾

Margin Only \*

No ▾

### Payment Details

Ltd Company \*

Javelin Corporation (GB)

Q X

Company Registration No. \*

12131456

Vat No. \*

339 0727 47

Account Reference \*

123456

Tax Code \*

20 ▾

Payment Address \*

76 Silver Street, , , Norwich, Norfolk, , NR3 7JZ ▾

Payment Contact \*

Paul Smith

Q X

## 3.2 Option to include Default CV when Sending a CV from Requirement

State: Done

Type: Enhancement

User Notes: There is now a new Global and Personal Setting in the "Requirement" section labelled "Attach Default Document when sending CV or arranging Interview" which is a Yes/No option.

Requirement	Requirement summary report number	
Requirement	Attach Default Document when sending CV or arranging Interview	Yes ▾
Requirement	Enable candidate suggestions for requirements?	▾

When this setting is set to "Yes", then when you select Candidates on a Requirement to send, then the default document of each Candidate will be automatically attached on the email.

## 4. Bug Fixes

### 4.1 PBI 42836 - Email Signatures not always being saved in Admin > User Maintenance

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State: Done

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Type: Bug

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User Notes: User signatures now update correctly within the user maintenance area when editing and clicking between multiple users.

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### 4.2 PBI 43687 - Candidate Skill Grading Not Showing

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State: Done

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Type: Bug

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User Notes: A bug where the skill grading was not being shown has been fixed

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### 4.3 Default Country Allocation with Creating Record

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State: Done

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Type: Bug

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User Notes: The candidate and company creation screens will no longer show the first country in the country lookup list when a default country is not defined.  
When creating a candidate or company (without a default country defined) a blank option will be the default in the country list.  
This is also the case when adding new secondary addresses to existing companies and contacts.

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## Revision History

Version	Date	Summary of Changes	Author
1.0	16/05/18	Initial Draft	David Payne