



Withholds

Release 2.17.4 onwards

Withholding has been updated to draw together all information on Person/Company/Vacancy withholding into a new view on each form Withholds. The following information is presented in a series of user stories

Person

I need to withhold a person from a company

A candidate can be withheld from a company at their choice via Person - Withholds and selecting 'New'.

The screenshot shows the 'Withholds' form. On the left is a sidebar with a menu containing 'Withholds', 'AWR', 'Timesheets', 'Payroll', 'Payroll Address', and 'Address'. The main area has a header with 'Social Media' and 'Address' tabs. The 'Address' tab is active, showing '5 Mayfield Terrace, Newtongrange'. To the right of the address are fields for 'CSCS' (set to 'No') and 'CSCS Expiry'. Below these are three buttons: 'Expand', 'New' (highlighted in green), and 'Delete'. At the bottom is a table with columns: 'Company', 'Job Title', 'Our Ref', and 'Note'.

The user can search for the required company and add notes to the withholding record.

The 'Select Company' dialog box is shown. It has a search bar with 'X' entered and buttons for 'Find', 'Select', 'Cancel', and 'Help'. Below is a table with columns: 'Company', 'Address', 'Town', 'County', 'Postcode', and 'Division'. The table lists three companies: 'Xchanging Uk Ltd.', 'XI Services Uk Ltd.', and 'Xtrakter Ltd.'. The first row is highlighted in orange.

Company	Address	Town	County	Postcode	Division
Xchanging Uk Ltd.	6th Floor	22 Billiter Street	London	EC3M 2SS	
XI Services Uk Ltd.	XI House	70 Gracechurch S	London	EC3V 0XL	
Xtrakter Ltd.	Watling House	33 Cannon Street	London	EC4M 5SB	

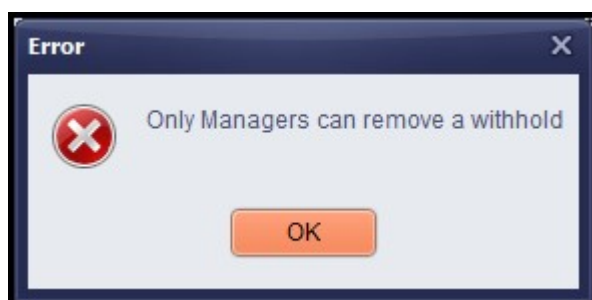


Expand New Delete			
Company	Job Title	Our Ref	Note
▶ Xchanging Uk Ltd.			test notes

Removing a withhold in person

Removing a candidate from a company withhold in Person – Withholds is done using the Delete button.

This can only be carried out by a user with a Manager role. Attempting to remove a withhold will display this message.




I want to remove an exclusive from within a person record.

If a candidate is 'Exclusive to a Vacancy' the following button will appear in Person – Withholds. To remove 'Exclusive to a Vacancy' click on this button.



Expand	New	Delete	Remove from exclusive to Workman Facilities Management Ltd. - Electricians -	
Company	Job Title	Our Ref	Note	
▶ Xchanging Uk Ltd.		test notes		

Confirm ✕

 Are you sure you want to remove the exclusive to Workman Facilities Management Ltd. - Electricians - ?

Company

I want to Withhold a Candidate from a Company or group of Companies

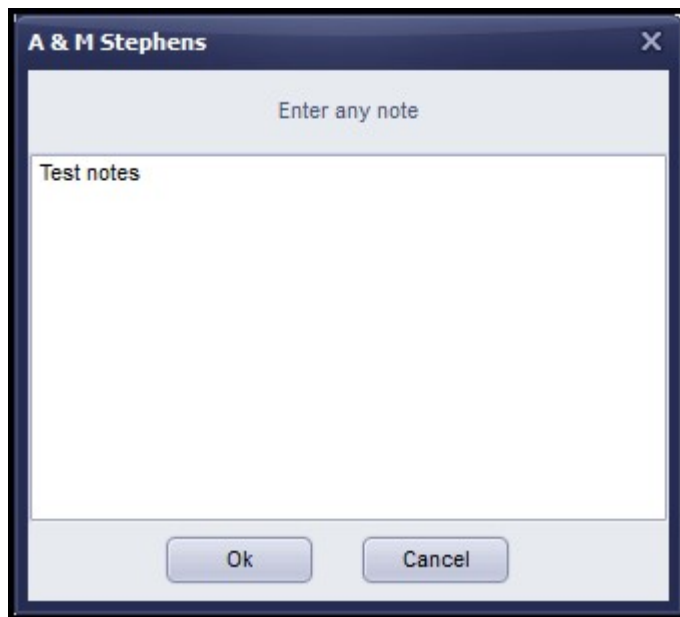
In Company - Withholds selecting New allows the User to search for a candidate to withhold and to add any associated notes.

Progress	Expand Candidate	Expand Vacancy	New	Delete		
Placements						
Withholds	▶ Cassius Duffy	10806	Vacancy	Electrician		test
Questionnaire						
Contact						

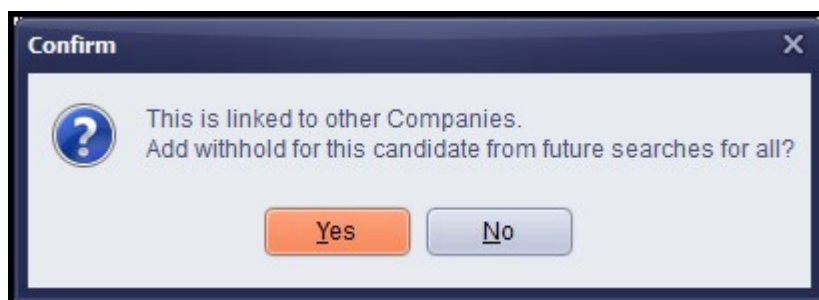
Select Candidate ✕

☐ Include Clients

Payroll	Name	State	Address		Town	County	Postcode	Division
	Jessica Ali	Pre registr	2 Old St					
0000LY	Shane Allen	Current	78 Osborne Rd				N13 5PU	Infrastru
50158	Alyssia Alvarado	Current	32 Grange Rd	Biddulph			ST8 7RY	Infrastru
	Betty Alvarado	Current	2 Maesycoed				SA43 1AP	Infrastru



If a company withhold is in a linked group, the user is offered the option to select just this company or all companies in the group.



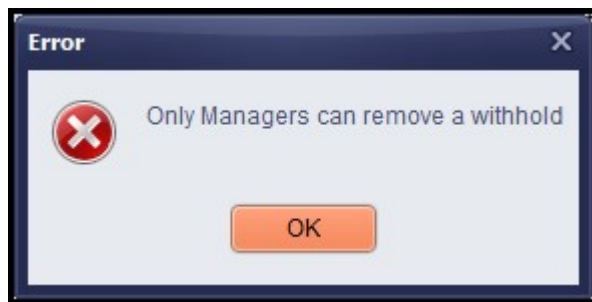
<div> Expand Candidate Expand Vacancy New Delete </div>						
Candidate	Registration	Type	Job Title	Our Ref	Note	
▶ Cassius Duffy	10806	Vacancy	Electrician	test		
Betty Alvarado	10037	Company		XX51041329092008021D		

Note - a candidate withheld from a company will appear as withheld in every Company's Vacancy in the Withhold view.

Removing a withhold in Company

Removing a candidate from a vacancy or company withhold in Company – Withholds is done using the Delete button.

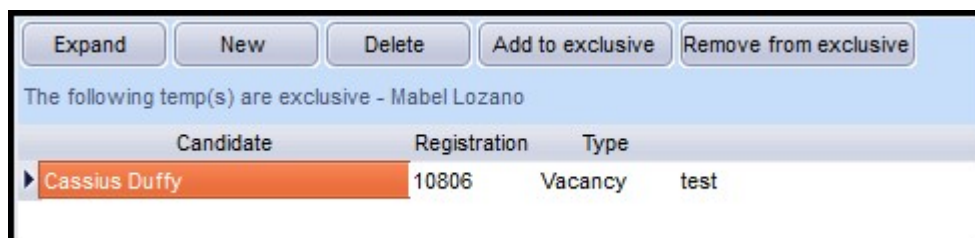
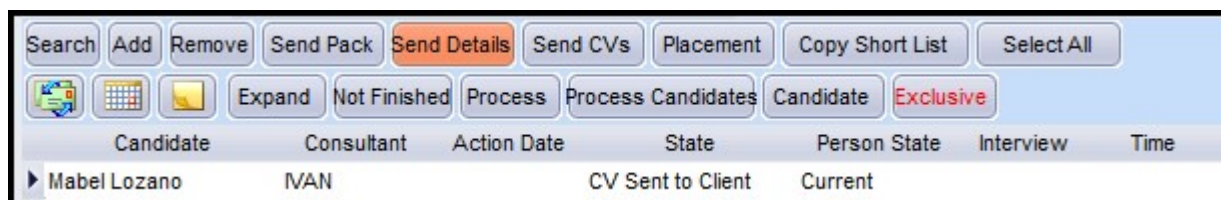
This can only be carried out by a user with a Manager role. Attempting to remove a withhold will display this message.



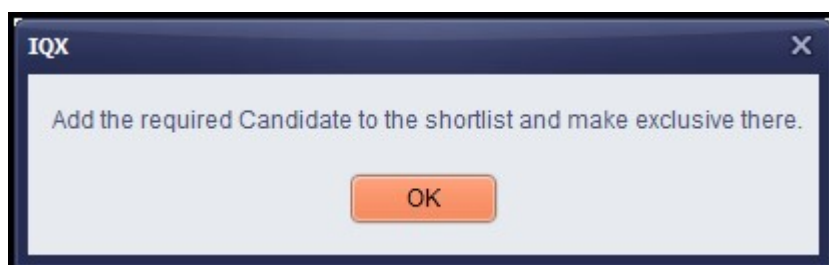
Vacancy

I want to make a candidate exclusive to a vacancy.

In Vacancy – Shortlist selecting a candidate as Exclusive is now recorded in Vacancy – Withholds.



Selecting 'Add to exclusive' in Vacancy – Withholds refers the user to vacancy Shortlist as normal.



The candidate can be removed from Exclusive from within Vacancy Shortlist by clicking on the Exclusive button or in Vacancy – Withholds by selecting 'Remove from Exclusive' and selecting the required candidate from a drop-down list.



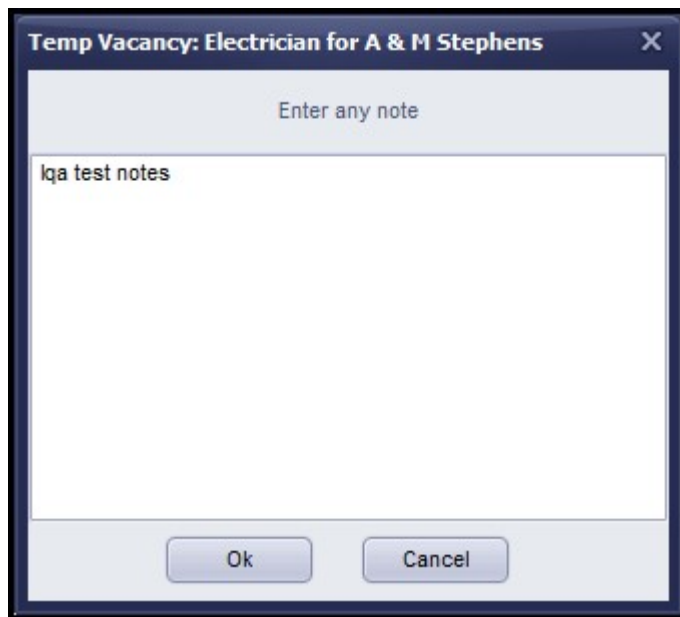
A dialog box titled "Temp Vacancy: Electrician for A & M Stephens" with a close button (X) in the top right corner. The main area contains the text "Select a Candidate" above a search input field. Below the input field, a dropdown menu is open, showing the selected candidate "Mabel Lozano - 10074". At the bottom, there are two buttons: "Ok" and "Cancel".

I want to withhold a candidate from a vacancy

In Vacancy - Withholds selecting New allows the User to search for a candidate to withhold and to add any associated notes.

A dialog box titled "Select Person" with a close button (X) in the top right corner. The main area has a light green background. At the top, there is a search input field containing "SA", a "Find" button, and two checkboxes: "Include Clients" and "All Departments". To the right of these are "Select", "Cancel", and "Help" buttons. Below the search area is a button labeled "Use Secondary Agency Candidate". The main part of the dialog is a table with the following data:

Payroll	Name	State	Address	Town	County	Postcode	Division
50103	Iqra Sanford	Current	167 Stockwell St			G1 4SP	Infrastru
50114	Autumn Santiago	Perm Placi	49 Kay St			E2 8QB	Infrastru

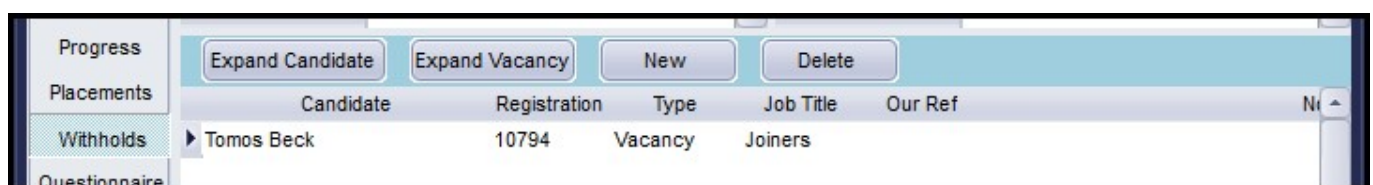


The withhold is recorded in Vacancy - Withholds



Candidate	Registration	Type	Note
Tomos Beck	10794	Vacancy	

and in the related Company - Withholds.

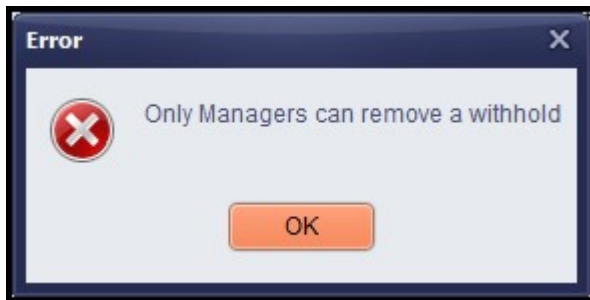


Candidate	Registration	Type	Job Title	Our Ref
Tomos Beck	10794	Vacancy	Joiners	

Removing a withhold in vacancy

Removing a candidate from a vacancy or company withhold in Vacancy - Withholds is done using the Delete button.

This can only be carried out by a user with a Manager role. Attempting to remove a withhold will display this message.



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