Voyager Infinity – Release Notes

Version: 4.65

Release Date: 23rd September 2022

What have we released?

- Infinity 4.65 has been released
- The Infinity Mid-office integration requires Mid-Office 5.1 Onwards (On Premise only)

Release overview

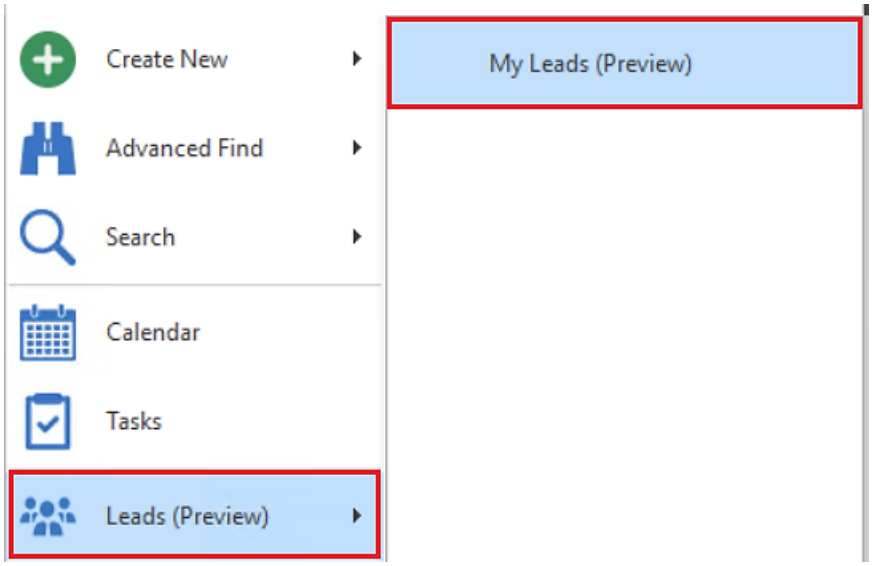
Here's a snapshot of what we've delivered in this release:

- Business Development – Leads (Preview)
- Record candidate source as a 'Contact' referral
- RingCentral – new user 'Phone' field

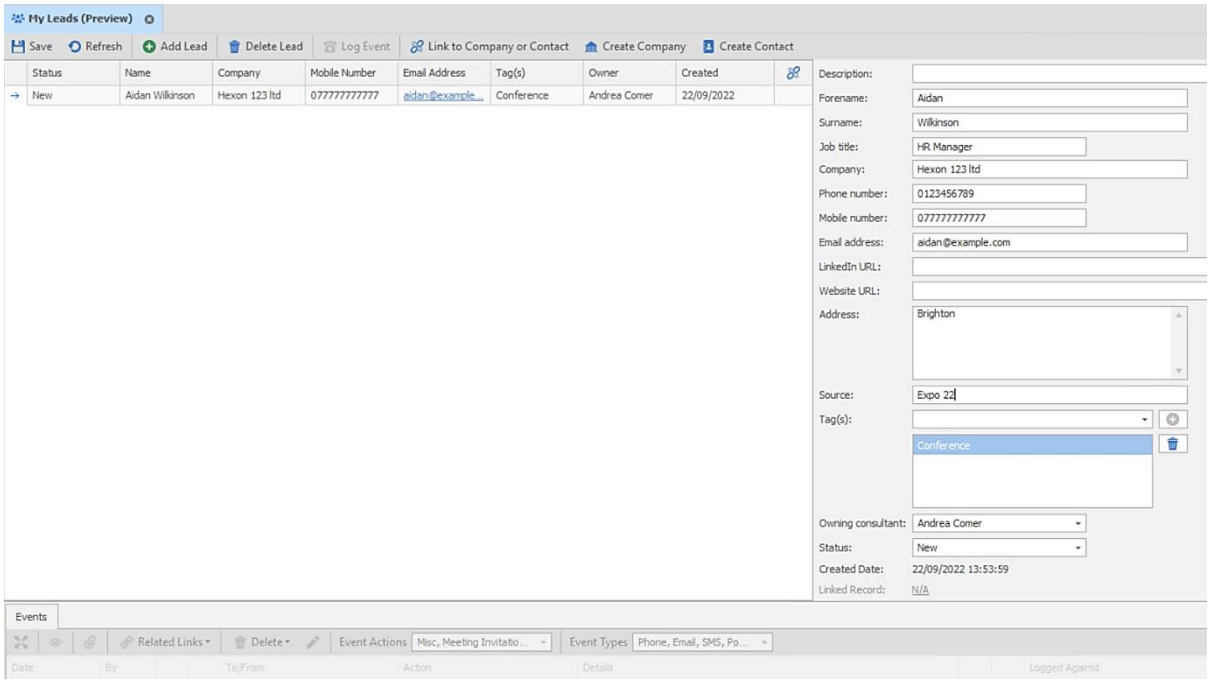
Enhancement 118198 Business Development – 'Leads' (Preview)

This is the preview version of the new Business Development 'Leads' area. Work is ongoing and further improvements and functionality will be added and released in future versions

There is a new 'Leads (Preview) / My Leads (Preview)' menu in the Application menu



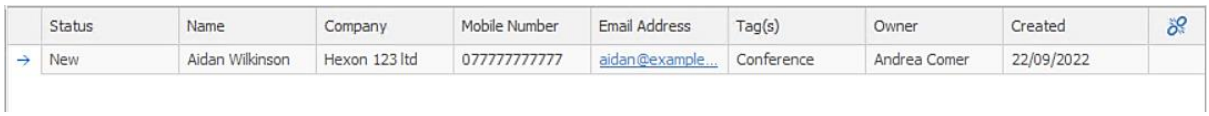
This opens the 'My Leads' window in a tab



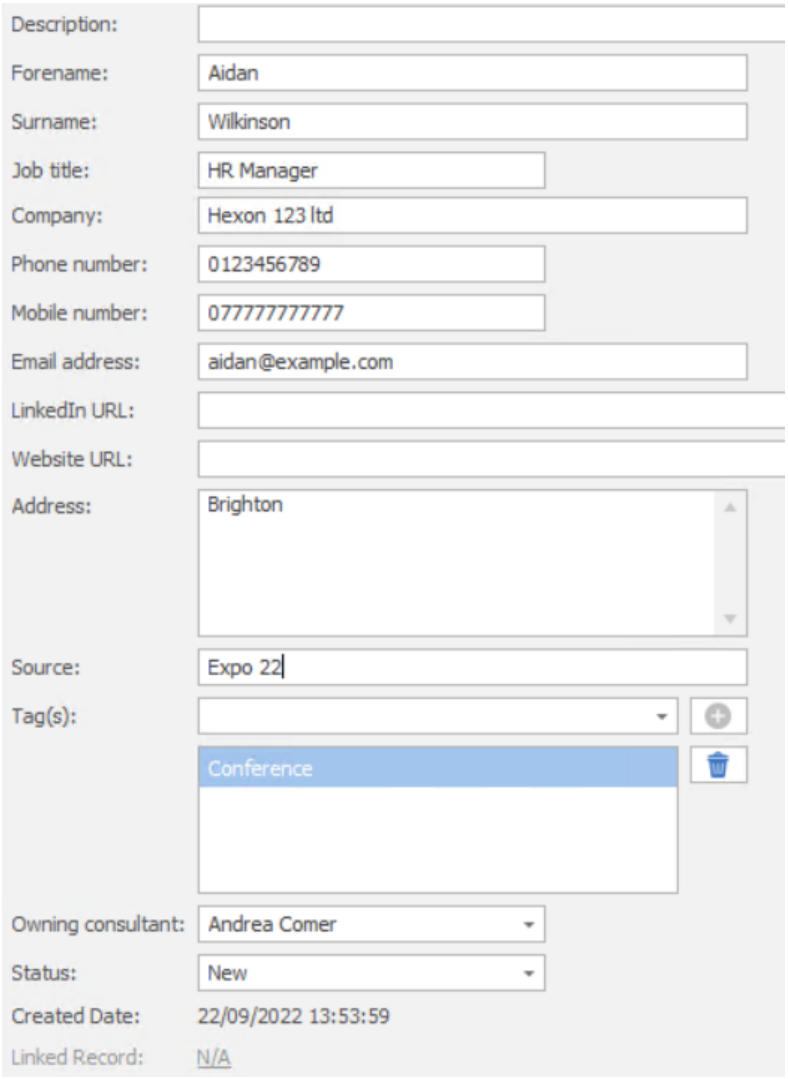
The screen layout has been tested with the following Windows resolutions/zoom settings

Resolution	Zoom %
1366 * 768	100
Min res 1440*900	100
1680*1050	125
1920*1080 and higher	125

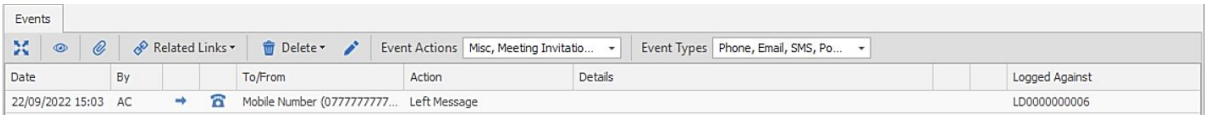
The left-hand side grid lists all the leads the user is the 'owner / owning consultant' of and that are 'Open' (status of 'New', 'Contacted' or 'Nurture'). The grid is not editable but is customizable, with column chooser/save layout, sorting/filtering, and Ctrl + F (find)



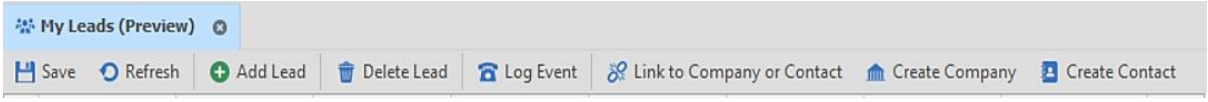
The right-hand side is a page that lists all fields for the selected lead. All fields are editable except 'Created date' and 'Linked record' at the bottom



The bottom section displays the events tab for the selected lead and functionality is available as per existing Infinity event grids / toolbars



There is a toolbar along the top to manage your leads



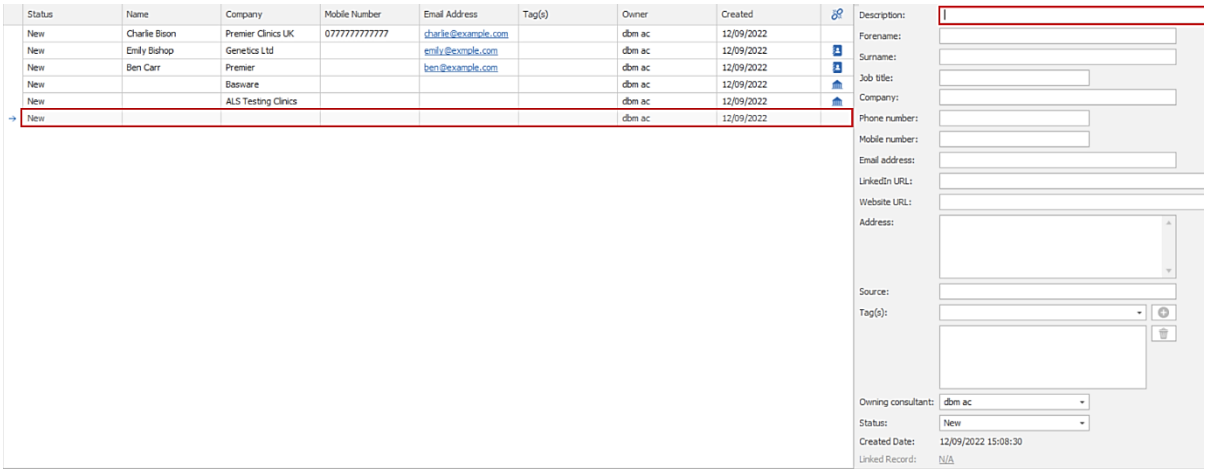
- Save
- Refresh
- Add Lead
- Delete Lead
- Log Event
- Link/Unlink to Company or Contact

- Create Company
- Create Contact

Add/Edit/Save Leads

Clicking the 'Add Lead' button on the toolbar creates a new row in the grid

The user can complete the fields in the lead page as required

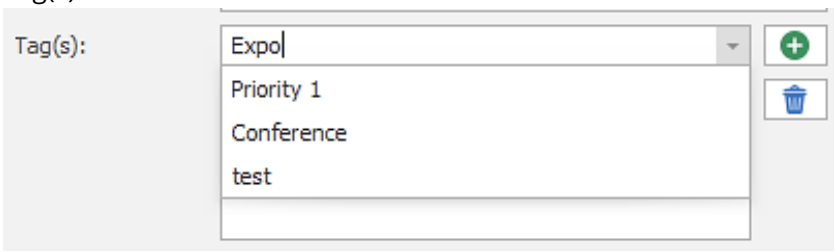


When creating a new lead, the following defaults are applied:

- 'Status' set to 'New'
- 'Created Date' set to current date/time
- 'Owning consultant' set to currently logged in user

The fields available on the lead page to update are as follows; all of which are free text except for 'Status' and 'Owning consultant' and none are mandatory:

- Description (e.g. website lead from XXXX)
- Forename
- Surname
- Job title
- Company
- Phone number
- Mobile number
- Email address
- LinkedIn URL
- Website URL
- Address
- Source
- Tag(s)



  - assign a tag by manually typing to create a new one or selecting an existing one, in the tag drop down field. Click the 'green plus' button to add to the grid
  - remove a tag by selecting it in the grid then clicking the 'bin' button
- Owning consultant
- Status – Statuses are manually changed and cannot be blank
  - New (ready to be reviewed)
  - Contacted (picked up, but not progressed to the next stage, e.g., attempted contact)
  - Nurture (qualified but not ready yet – keep as a lead for now)
  - Qualified (qualified and in a potential buying/recruiting position)
  - Disqualified (not going to be an opportunity ever)

Changes made to the fields in the lead page are reflected immediately in the grid columns. The user must save the changes by the 'Save' button on the toolbar

The user can navigate to different lead pages making changes / editing without having to save each page each time and instead save all changes at the end. If the 'My Leads (Preview)'window is closed by the cross, and unsaved changes found in any lead, the user is prompted to save all changes

If a lead is changed to 'Qualified/Disqualified' status or assigned to a different 'Owning Consultant' it will disappear when saved

Note: Qualified and Disqualified leads will be accessible in the next release

Refresh

Refreshes the leads grid with the latest changes

Delete Lead

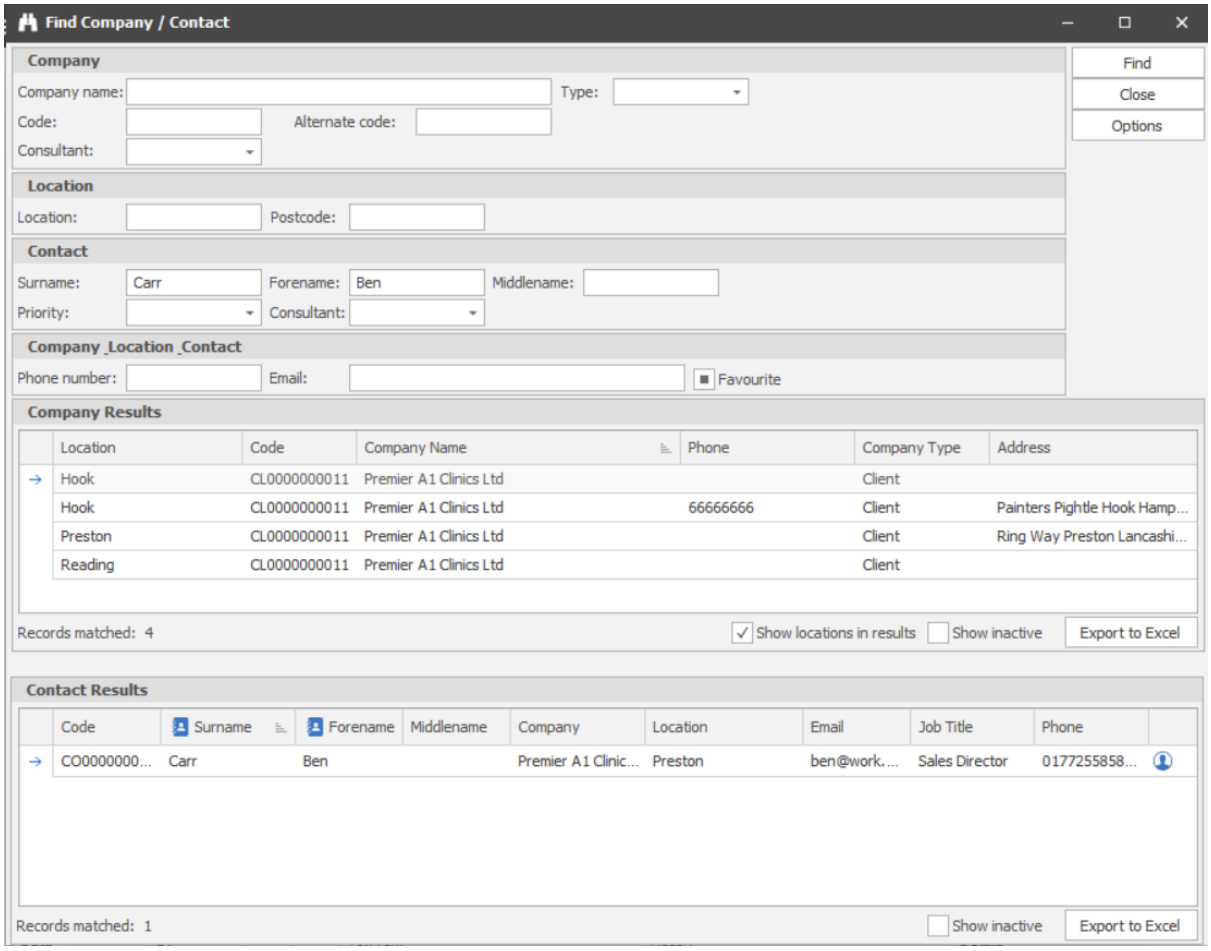
Lead(s) can be highlighted in the list and deleted. The leads grid must be saved afterwards for the deletion to be permanent as otherwise changes are lost / reverted, including any deletions

Link / Unlink to Company or Contact

There is a 'Link to Company or Contact' button on the toolbar that links the selected lead to an existing company or contact on the Infinity database

The button is available only if the lead is not already linked

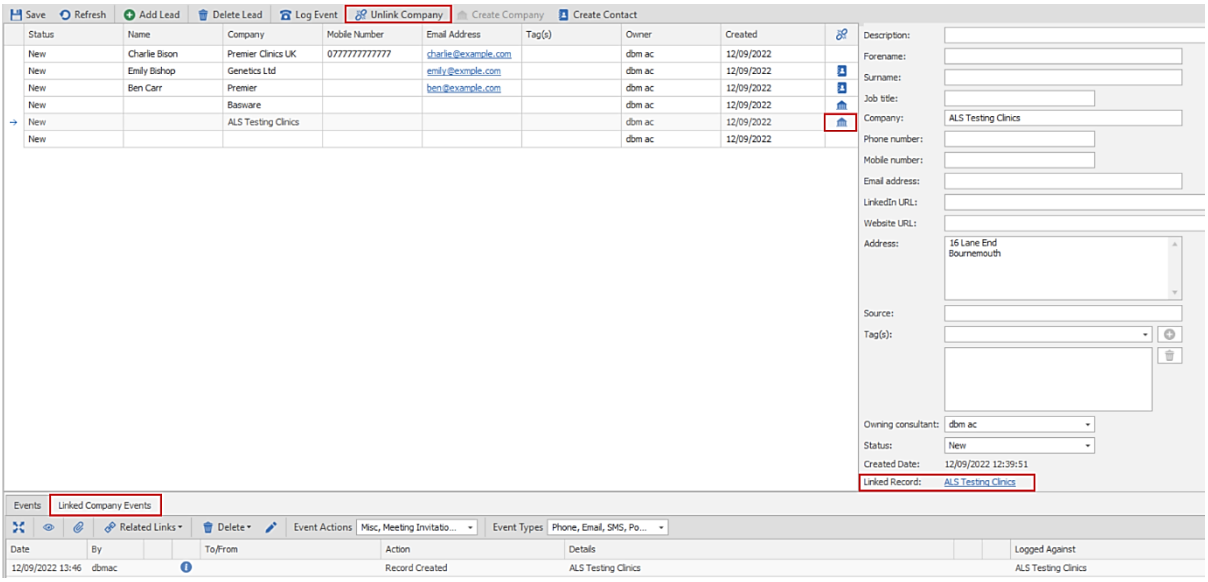
This opens the 'Find Company / Contact' window, where the user can find and double click on the required company or contact in the results grid to link. If contact is selected it will be linked to their specific company location on the Infinity database



When a lead is linked:

- The 'Link (chain icon)' column in the grid will show either the company or contact icon and is a clickable hyperlink to launch the linked page
- The linked record field in the page displays the contact or company name and is a hyperlink to launch the linked page
- The linked events tab enables showing the events from the Infinity company or contact record

- The button on the toolbar will change to 'Unlink Contact' or 'Unlink Company' so the user can remove the link if required



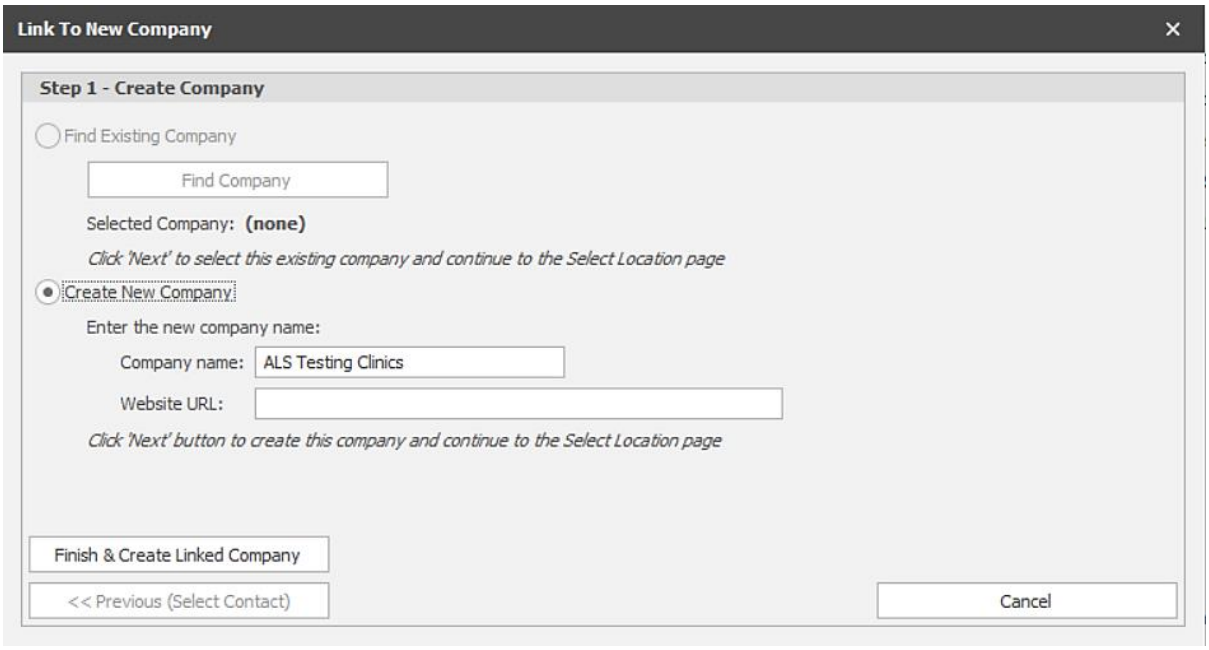
Create Company

There is a 'Create Company' button on the toolbar that launches a wizard to link the selected lead to a newly created company on the Infinity database

The button is available only if the lead is not already linked

Step 1 – Create Company

Step 1 of the wizard allows the new company details to be completed by the user. The field values are defaulted if the data is populated on the lead record



When the user clicks on 'Finish & Create Linked Company', the new company is created accordingly on the Infinity database with fields populated and linked to the lead record

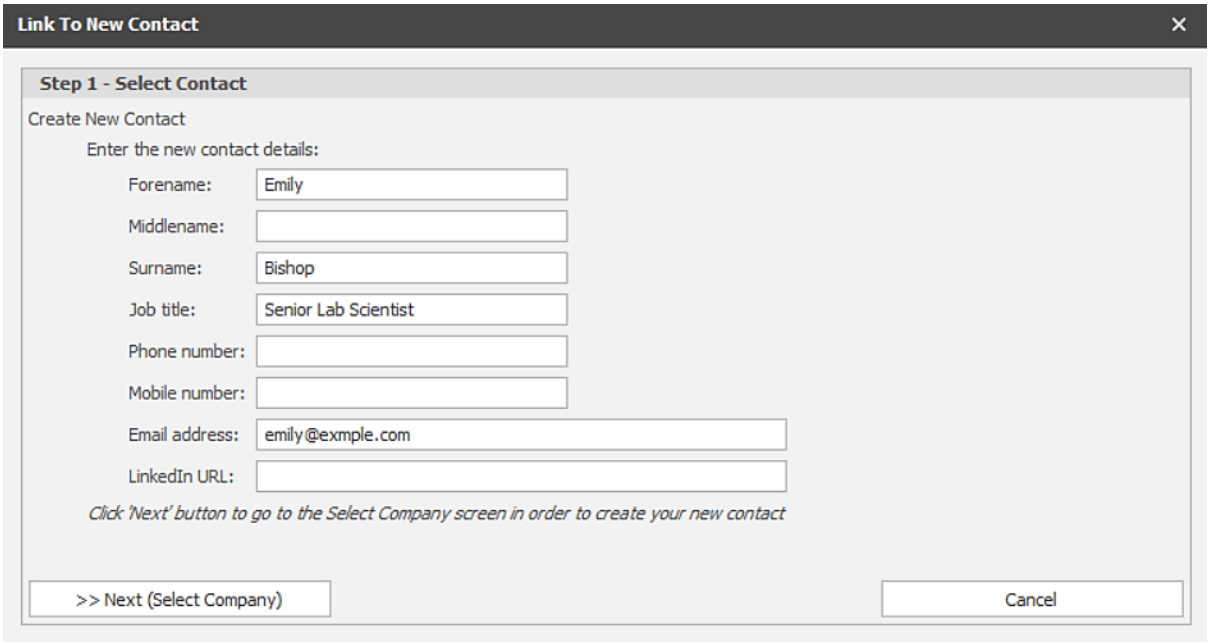
Create Contact

There is a 'Create Contact' button on the toolbar that launches the 'Link to New Contact' wizard. This allows the selected lead to be linked to a newly created contact on the Infinity database

The button is available only if the lead is not already linked

Step 1 – Select Contact

Step 1 of the wizard allows the contact details to be completed by the user. The field values are defaulted if the data is populated on the lead record

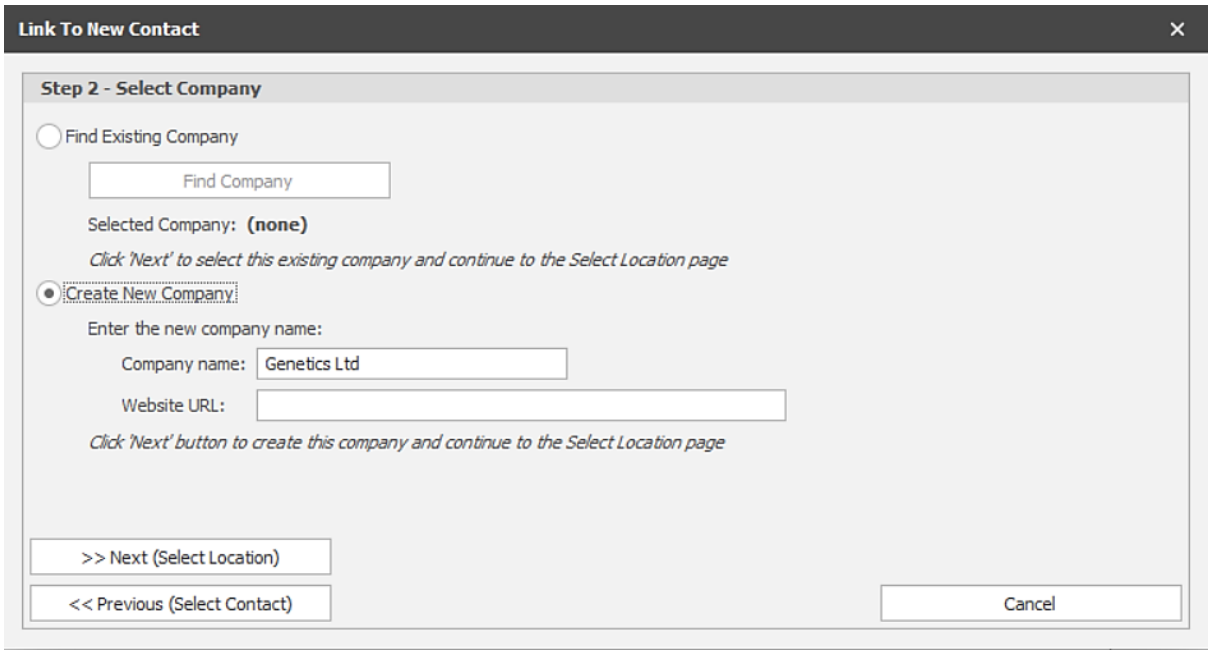


Step 2 – Select Company

Step 2 of the wizard allows the user to either:

- Select and find an existing company on the Infinity database

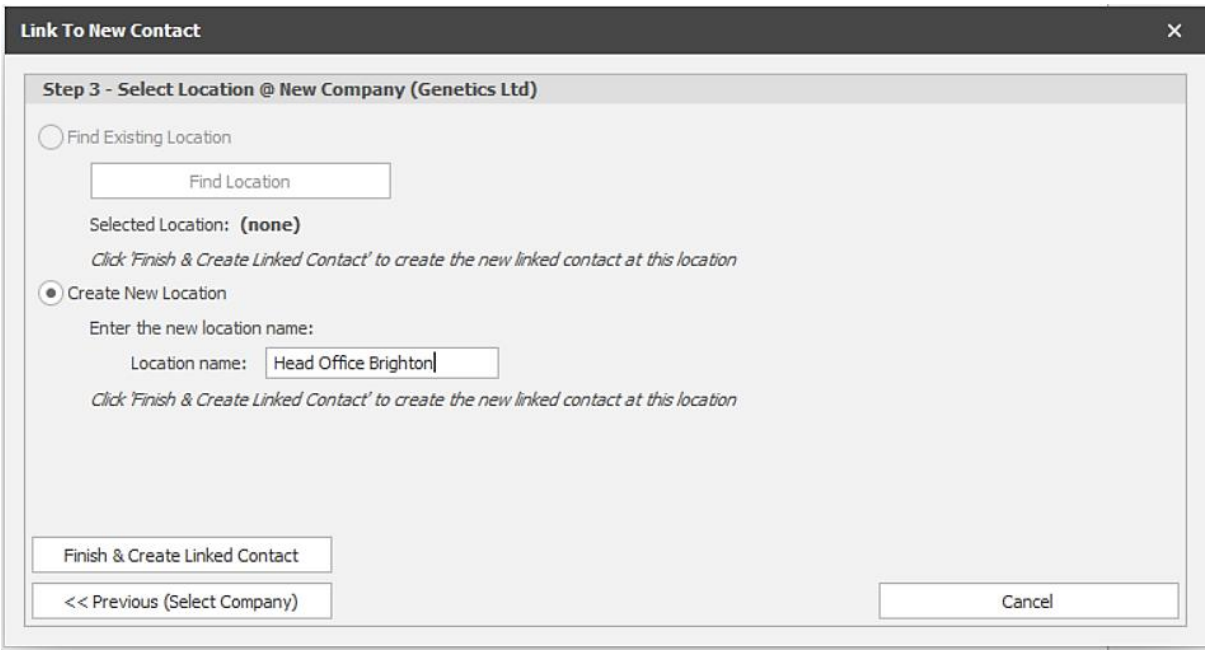
- Create a new company. User can complete the details and the field data will be defaulted if populated on the lead record



Step 3 – Select Location

Step 3 of the wizard allows the user to either:

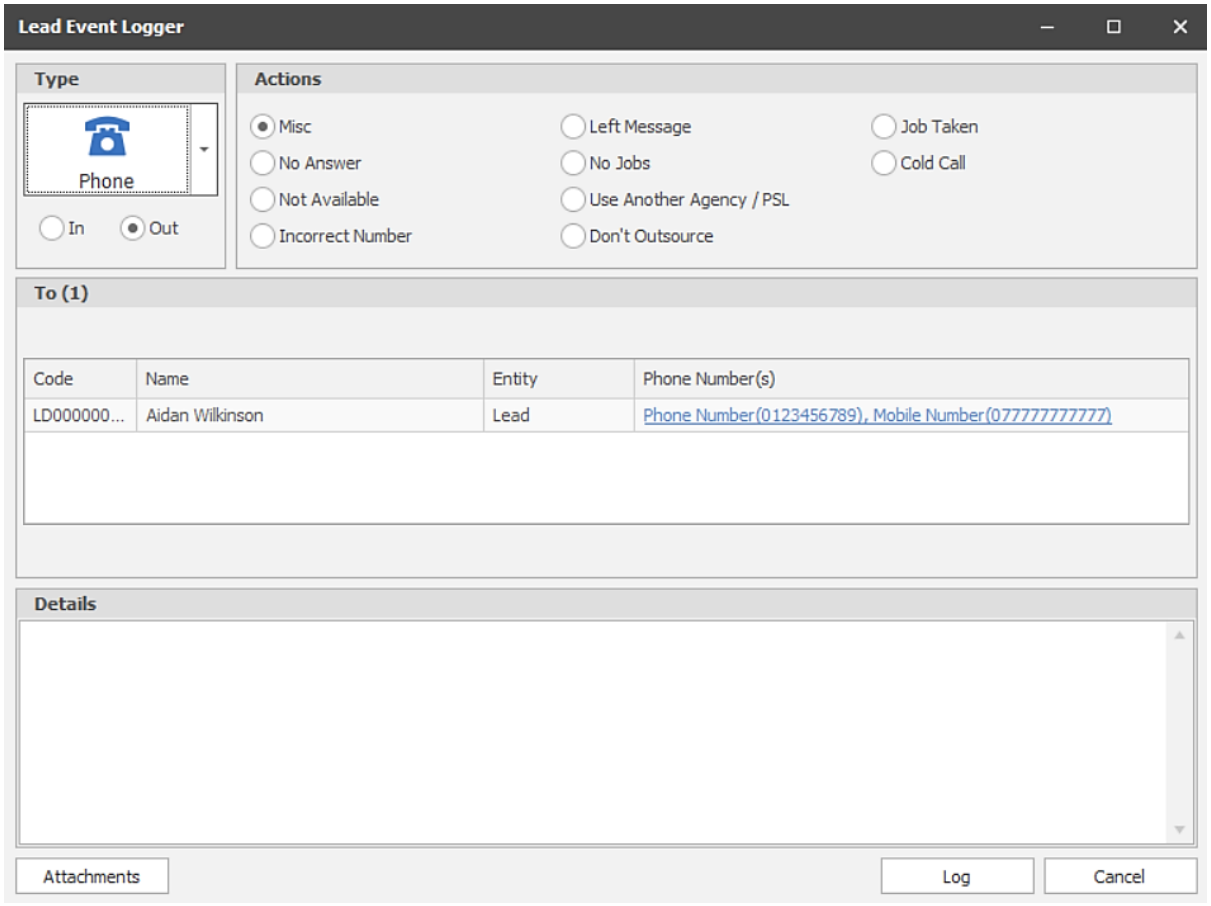
- Select and find a location at the existing company on the Infinity database. This option enables only if the 'Find Existing Company' option was selected in Step 2
- Create a new location. This will be at a new company or existing company depending on the option chosen in Step 2. User can complete the location name



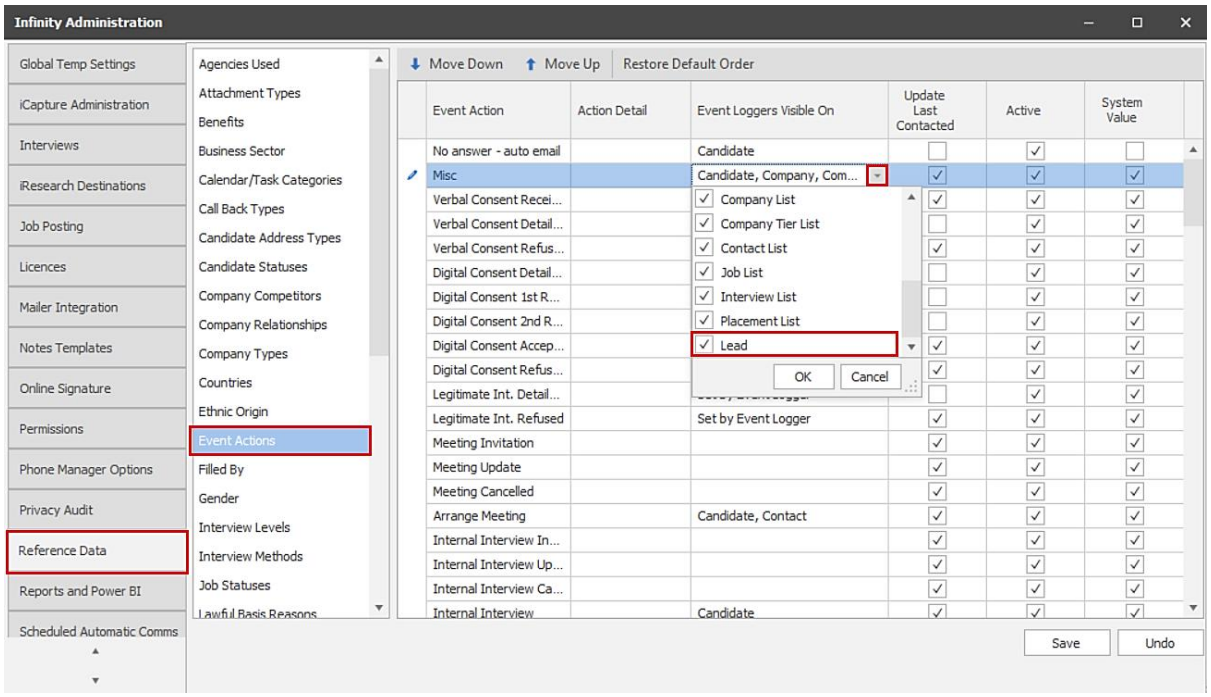
When the user clicks on 'Finish & Create Linked Contact', the new contact is created accordingly on the Infinity database with the fields populated and linked to the lead record

Log Event

An event can be logged against the selected lead by the 'Log Event' button on the toolbar. The 'Lead 'event logger loads and functions like the existing Infinity event loggers with applicable defaults applied



Event actions can be assigned to the 'Lead' event logger in Administration / Reference Data / Event Actions



As default, the following event actions are assigned to the 'Lead' event logger upon upgrade:

- Misc
- No Answer
- Not available
- Incorrect Number
- Left message
- No jobs
- Use Another Agency / PSL
- Don't Outsource
- Jobs Taken
- Cold Call

The following functionality is not available in the 'Lead' event logger

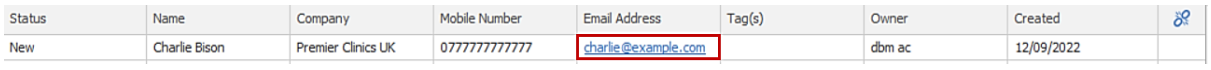
- Log Options
- Follow Ups
- Right click menu of 'WhatsApp' in the phone number column

Attachments can be added to the event by clicking the 'Attachments' button at the bottom of the event logger screen. This allows a file to be selected from Windows Explorer

The user can complete the details in the event logger as required. When logged, the event will show in the events tab

Emailing

The email address in the leads grid is displayed as a hyperlink

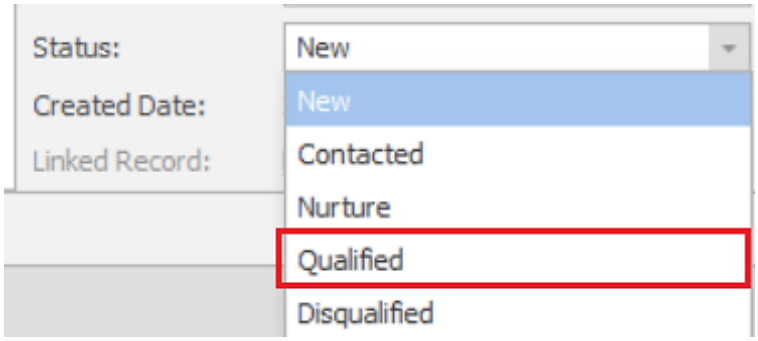


Clicking on the hyperlink will create an email, to that address, in the user's default Windows mail client ready for the user to complete and send

The 'Lead' event logger will automatically load, defaulting to an outgoing email ready for the user to complete the details and log manually

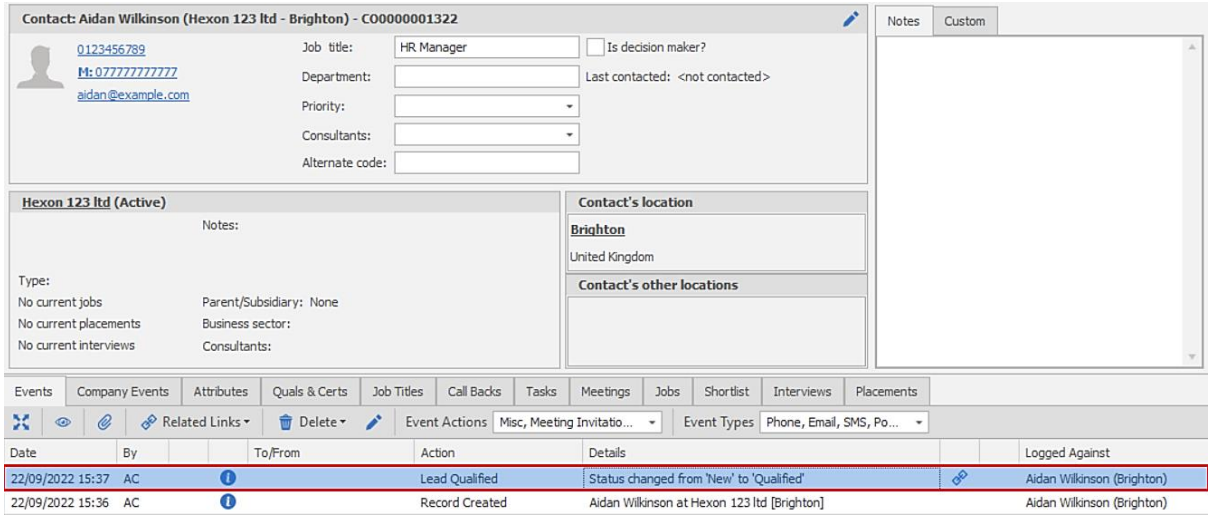
Qualifying

The lead must be linked to an Infinity company or contact for the status to be changed to 'Qualified'



If the lead is not linked, the linking process is initiated when the user changes the status to 'Qualified'. This opens the 'Find Company / Contact' window, where the user can find and double click on the required company or contact in the results grid to link. Canceling the process will reset the status to what it was before

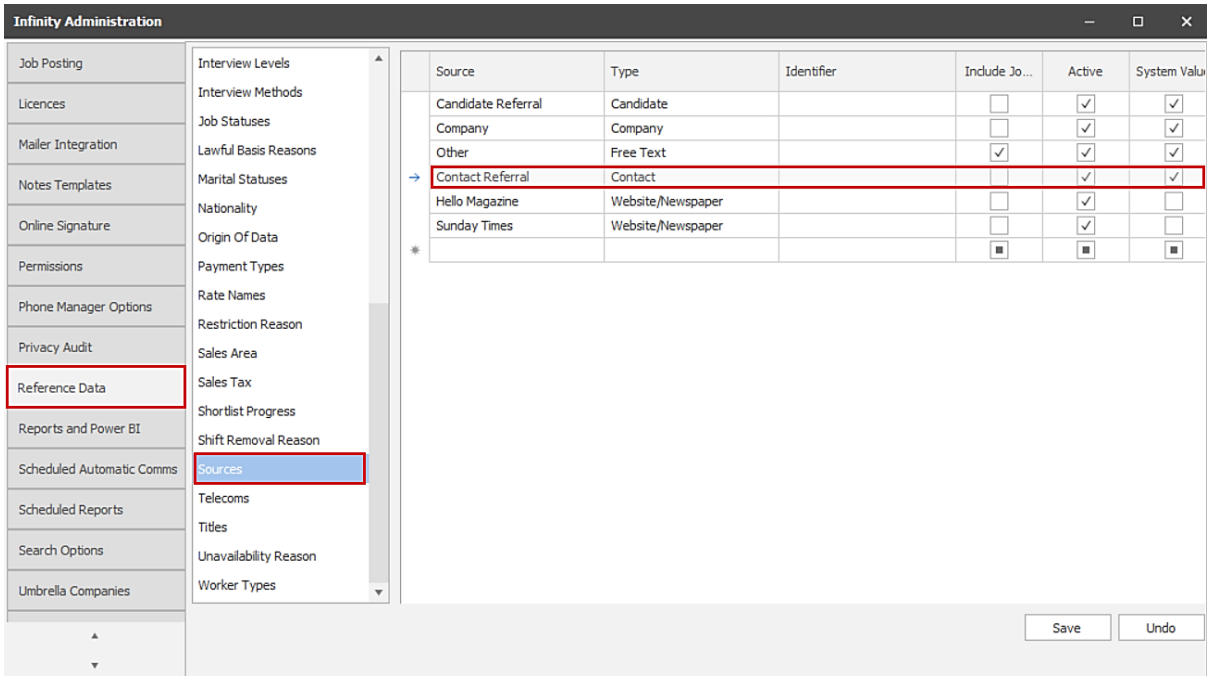
When the status changes to 'Qualified' a 'Lead Qualified' Event is logged on the lead page and on the linked Infinity record



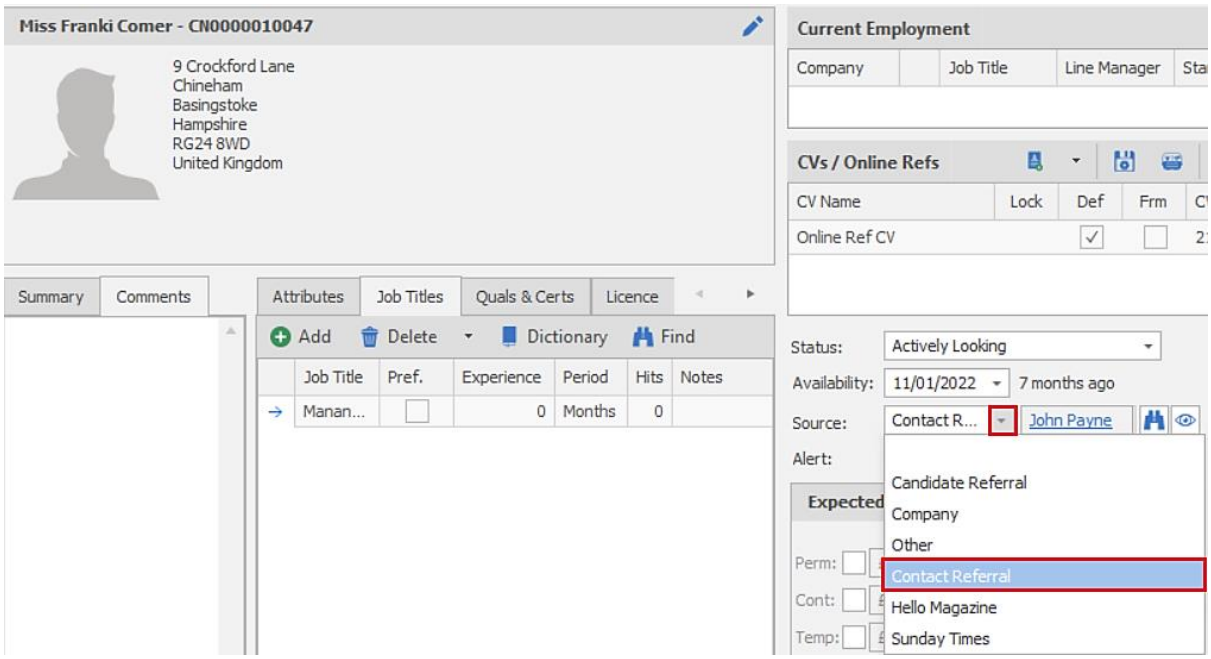
Note: *A lead of status 'Qualified' is essentially 'closed' and further workflow should be done from the company or contact record in Infinity*

Enhancement 118175 Record a candidate source as a referral from a contact

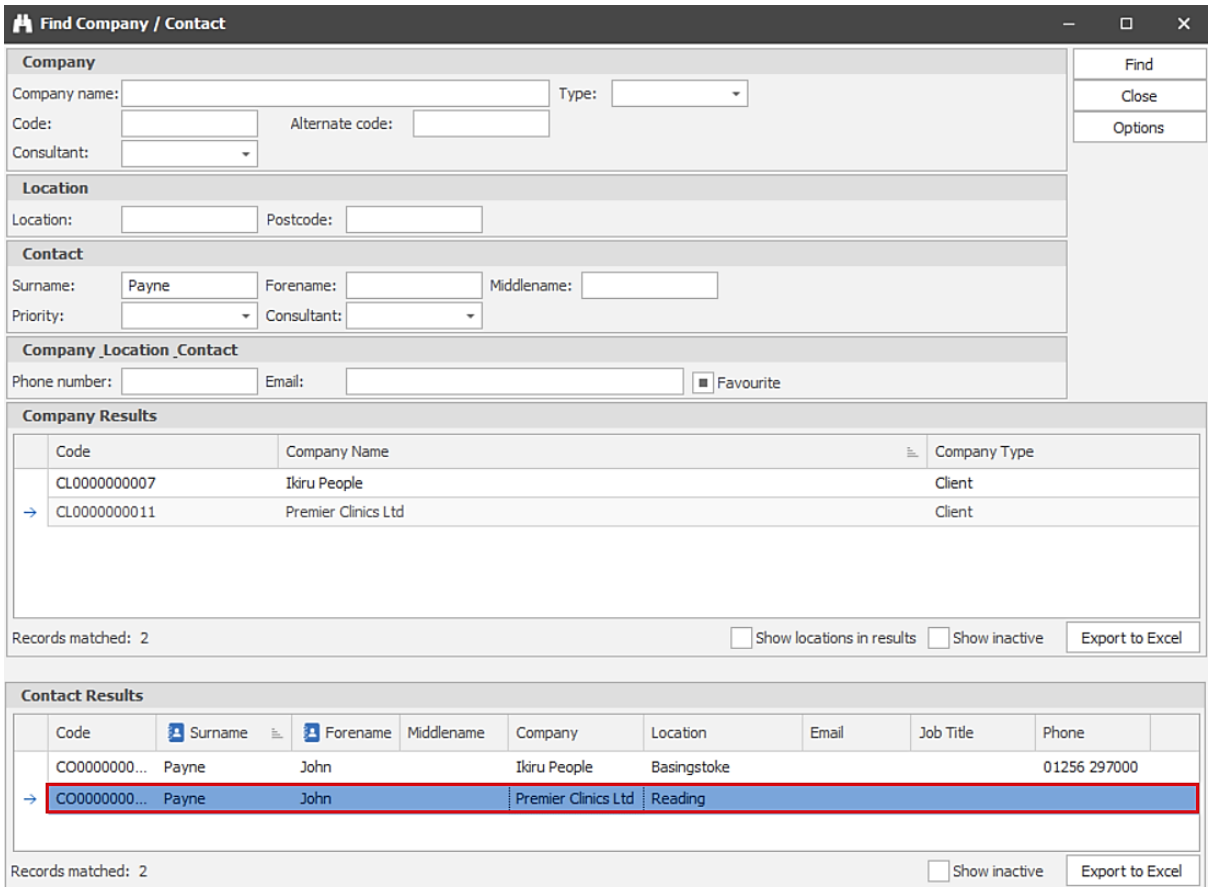
A new system candidate source of 'Contact Referral' has been added in Administration / Reference Data / Sources tab



Candidates can be assigned a 'Contact Referral' source and the user can link it to a contact on the Infinity database

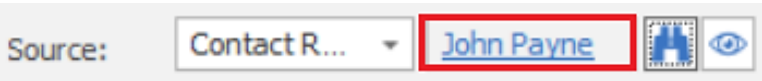


The adjacent binoculars are used to find and select a contact. This opens the find Company/Contact window



A contact can be selected by double clicking in the contact results grid

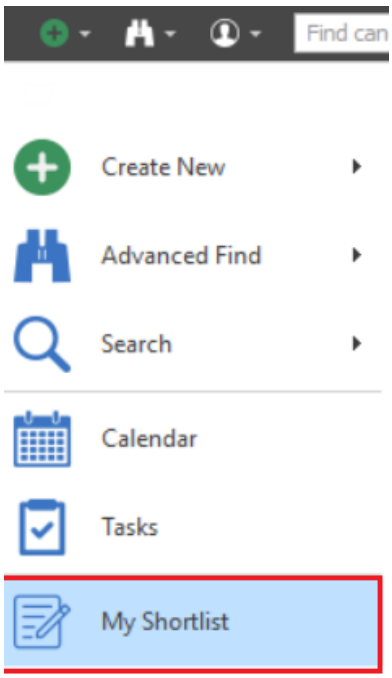
The contact's name shows next to the source field and the user can launch the contact page by clicking on the hyperlink



The 'Show All' sources button displays the source in the grid as per standard functionality

Enhancement 117967 Application 'Shortlist' menu renamed to 'My Shortlist'

The 'Shortlist' menu option from the Application Menu is specific to the logged-on user, and has been renamed to 'My Shortlist'



Enhancement 118079 Double-click on Quick Steps to edit

Double-click on Quick Steps in the grid in Administration / Global Quick Steps or User Options / Quick Steps screens to open and edit

Enhancement 117965 Double-click an iCapture data source to edit

Double-click on data sources in the grid in Administration / iCapture Administration / Data Source Settings tab to open and edit

Enhancement 117952 Mailer / Interviews tabs in Admin require Database Manager access

Users require Database Manager access to see/configure the following tabs in the Administration screen:

- Interviews (Odro)
- Mailer Integrations (Mailchimp)

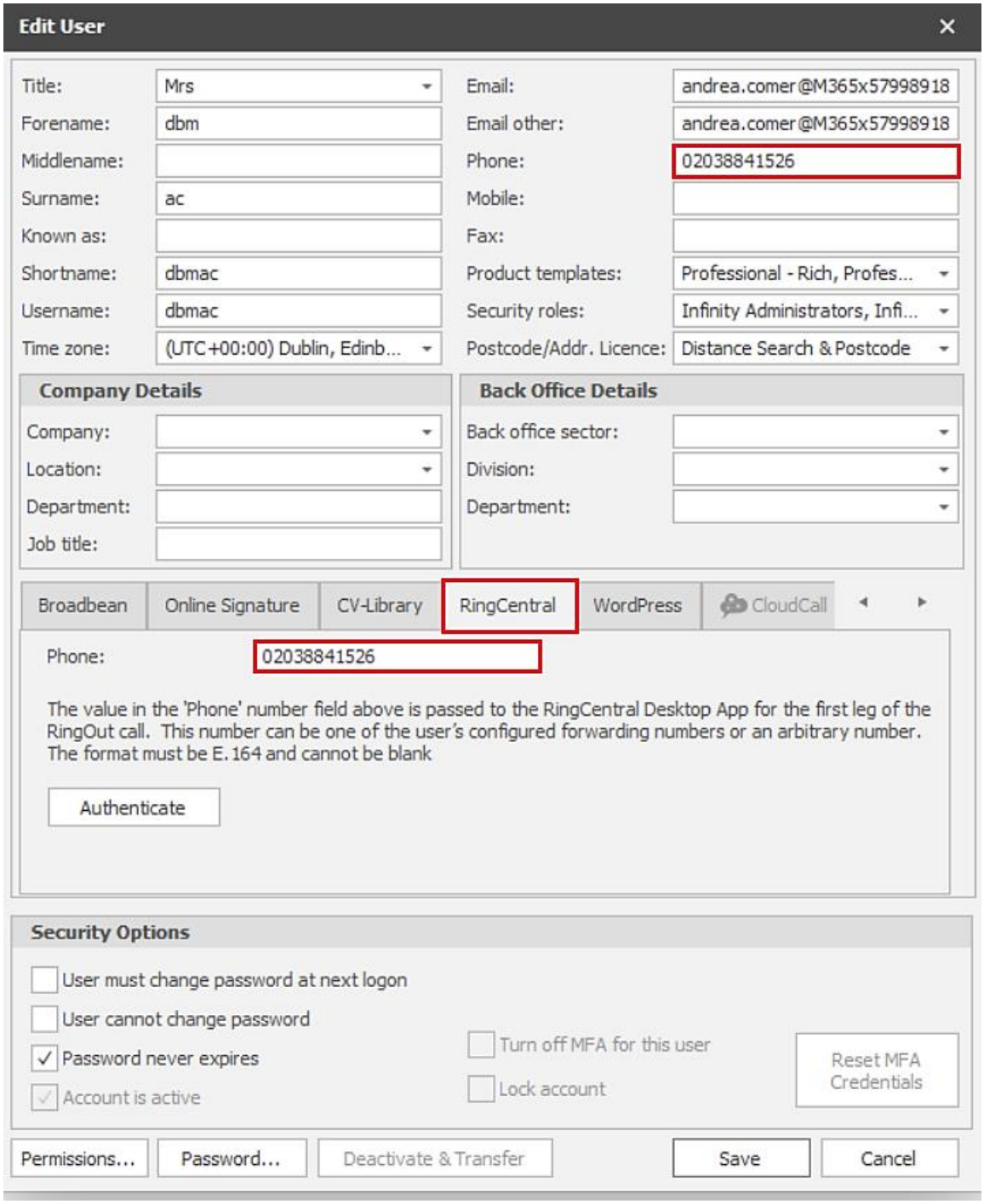
Enhancement 117956 Temp rates permission changes

Users with **only** the 'EditGlobalAndCompanyTempRates' permission can see the Job Title Defaults tab in Administration / Global Temp Settings and have full access to it

The other tabs will be hidden

Enhancement 118169 RingCentral - new user 'Phone' field

In the User Administration / Edit User / RingCentral tab, there is a new field called 'Phone'. This is the 'from' number that is used when a RingCentral call out is made from Infinity by that user. In previous versions of Infinity, the user's 'Phone' field was used



Upon upgrade the content of the user's 'Phone' field is copied to the user's RingCentral 'Phone' field if the database is configured for RingCentral

Feedback please

We are continuously looking to improve Voyager Infinity and are keen to hear your thoughts. Please email suggestions@ikirupeople.com with any feedback on existing functionality or ideas for new functionality