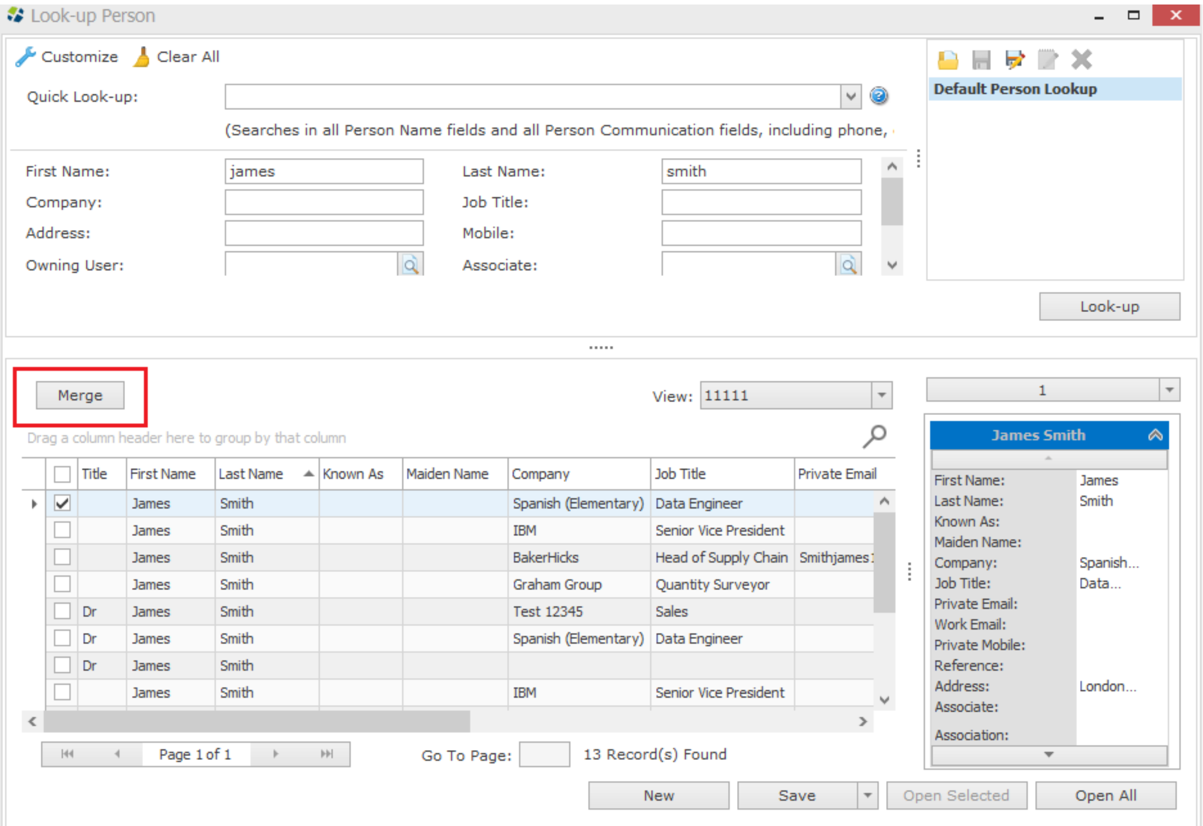
Release Overview – FileFinder 11.43

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

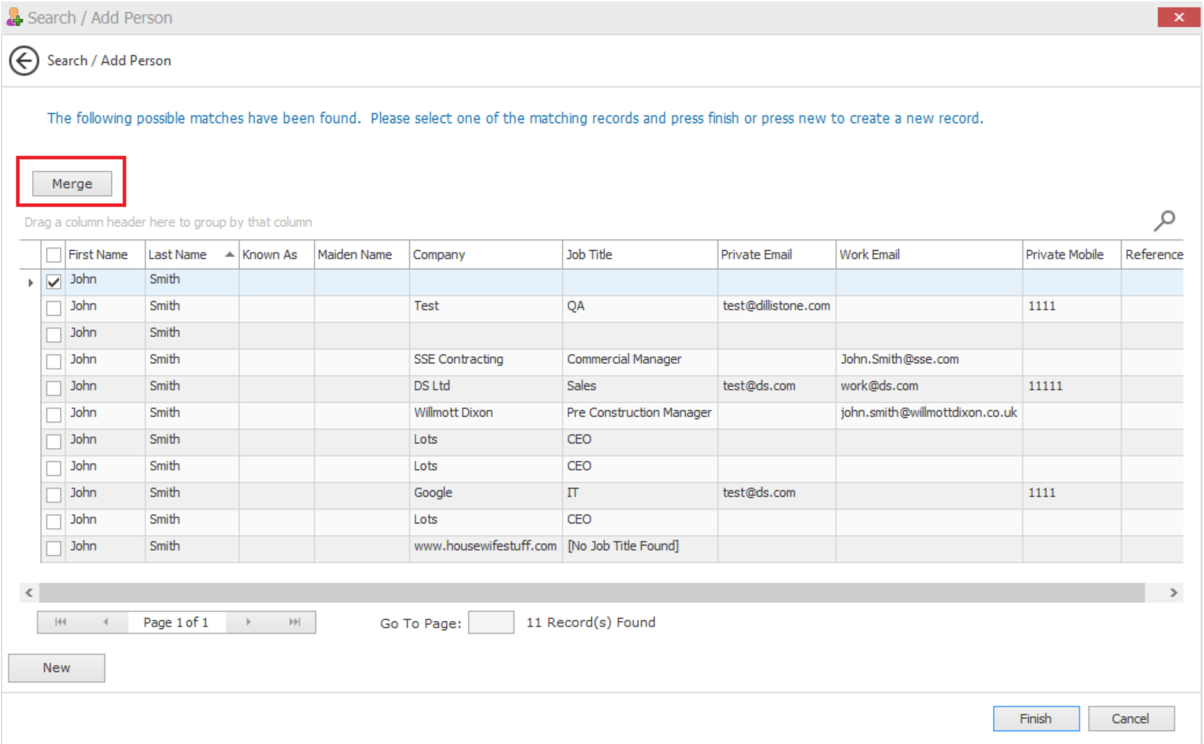
- "Merge" records option added on all People and Company Look-up and Add New screens
- Individual Logs can now be deleted
- Added option for unregistered companies in spreadsheet Import (Bulk Import)
- Users can now copy a single person to multiple lists
- Document Category can now be set when logging an email from Outlook
- Relationship link on a Person record will appear in bold if an active relationship exists
- Work Record "Employment Type" field is now added as searchable field in Person Search
- "Person Title" field added in Person Search
- "Biography" field added as a mappable field in Bulk Import
- Assignment Type column added to Assignment lists
- Ability to turn off auto generation of Invoice reference numbers
- "Paid On" date added to Assignment Invoices infobox
- FileFinder Browser Email templates are now accessible from the FF O365 app
- Fixed an issue with CV parsing not pulling Person qualifications correctly from a Resume/CV
- Fixed an issue with creating a new person with Quick Import from Add New would close FileFinder

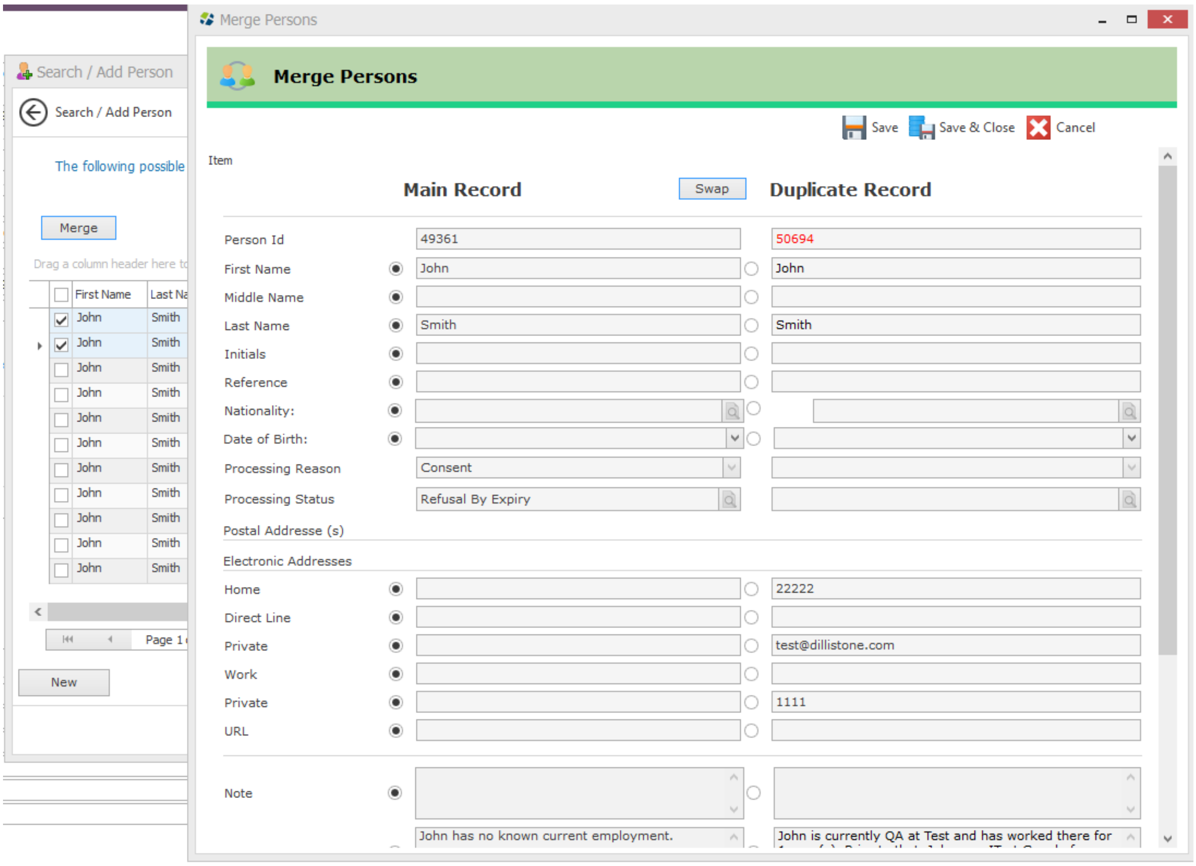
New Functionality/Features and Enhancements

- **"Merge" records option added on all People and Company Look-up and Add New screens**
  - This will allow users to merge People and Company records directly from the Lookup and Add New screens
  - Enables users to merge any duplicate records they find without having to open the results list
  - The "Merge" option uses the same existing "Merge records" permission in Admin, if the user does not have the permission set to "Yes" then the Merge button will not show
    - **Lookup**

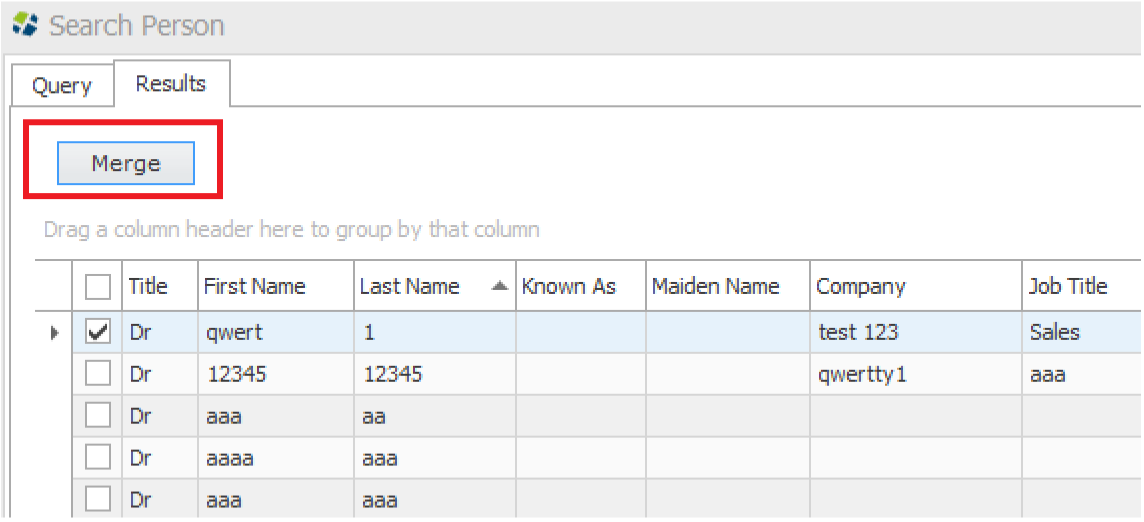


- ## Add New

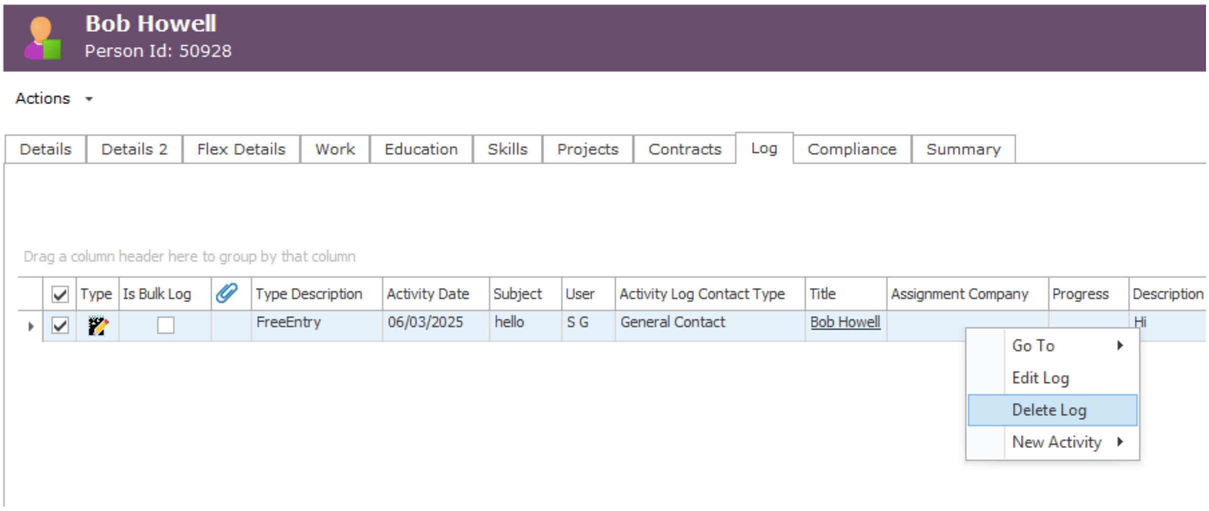

Search / Add Person
Search / Add Person
The following possible matches have been found. Please select one of the matching records and press finish or press new to create a new record.
Merge
Drag a column header here to group by that column
First Name
Last Name
Known As
Maiden Name
Company
Job Title
Private Email
Work Email
Private Mobile
Reference
John Smith
John Smith Test QA test@dillistone.com 1111
John Smith
John Smith SSE Contracting Commercial Manager John.Smith@sse.com
John Smith DS Ltd Sales test@ds.com work@ds.com 11111
John Smith Willmott Dixon Pre Construction Manager john.smith@willmottdixon.co.uk
John Smith Lots CEO
John Smith Lots CEO
John Smith Google IT test@ds.com 1111
John Smith Lots CEO
John Smith www.housewifestuff.com [No Job Title Found]
Page 1 of 1
Go To Page:
11 Record(s) Found
New
Finish
Cancel


Merge Persons
Merge Persons
Save
Save & Close
Cancel
Item
Main Record
Swap
Duplicate Record
Person Id 49361 50694
First Name John John
Middle Name
Last Name Smith Smith
Initials
Reference
Nationality:
Date of Birth:
Processing Reason Consent
Processing Status Refusal By Expiry
Postal Address (s)
Electronic Addresses
Home 22222
Direct Line
Private test@dillistone.com
Work
Private 1111
URL
Note
John has no known current employment.
John is currently QA at Test and has worked there for
Search / Add Person
Search / Add Person
The following possible
Merge
First Name
Last Na
John Smith
New

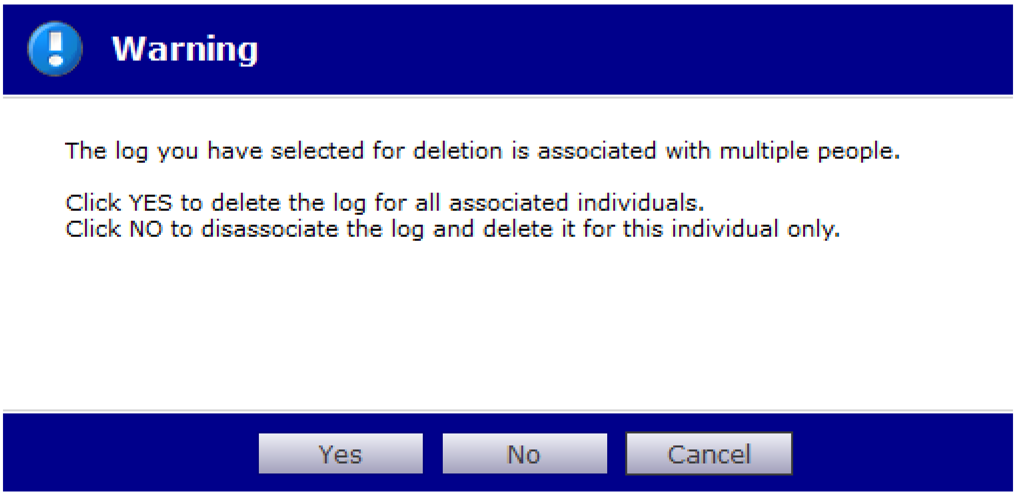
- **In FileFinder Desktop the merge option has also been added for People and Company search results list**



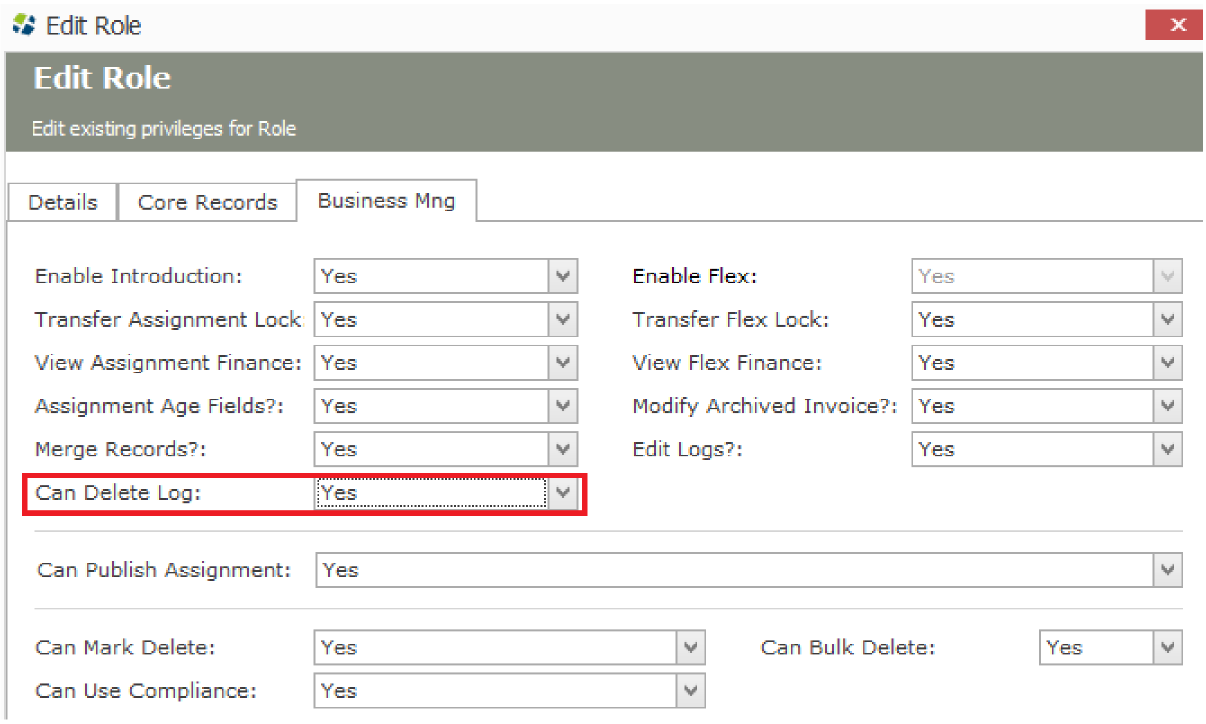
- **Ability to delete individual Logs**
  - Users can now delete individual logs in FileFinder
  - The Delete Log option is available on the Log tab of a module by right clicking the log to be deleted
  - Tasks and Appointments logs cannot be deleted and deleted logs cannot be retrieved again by users once deleted in FileFinder



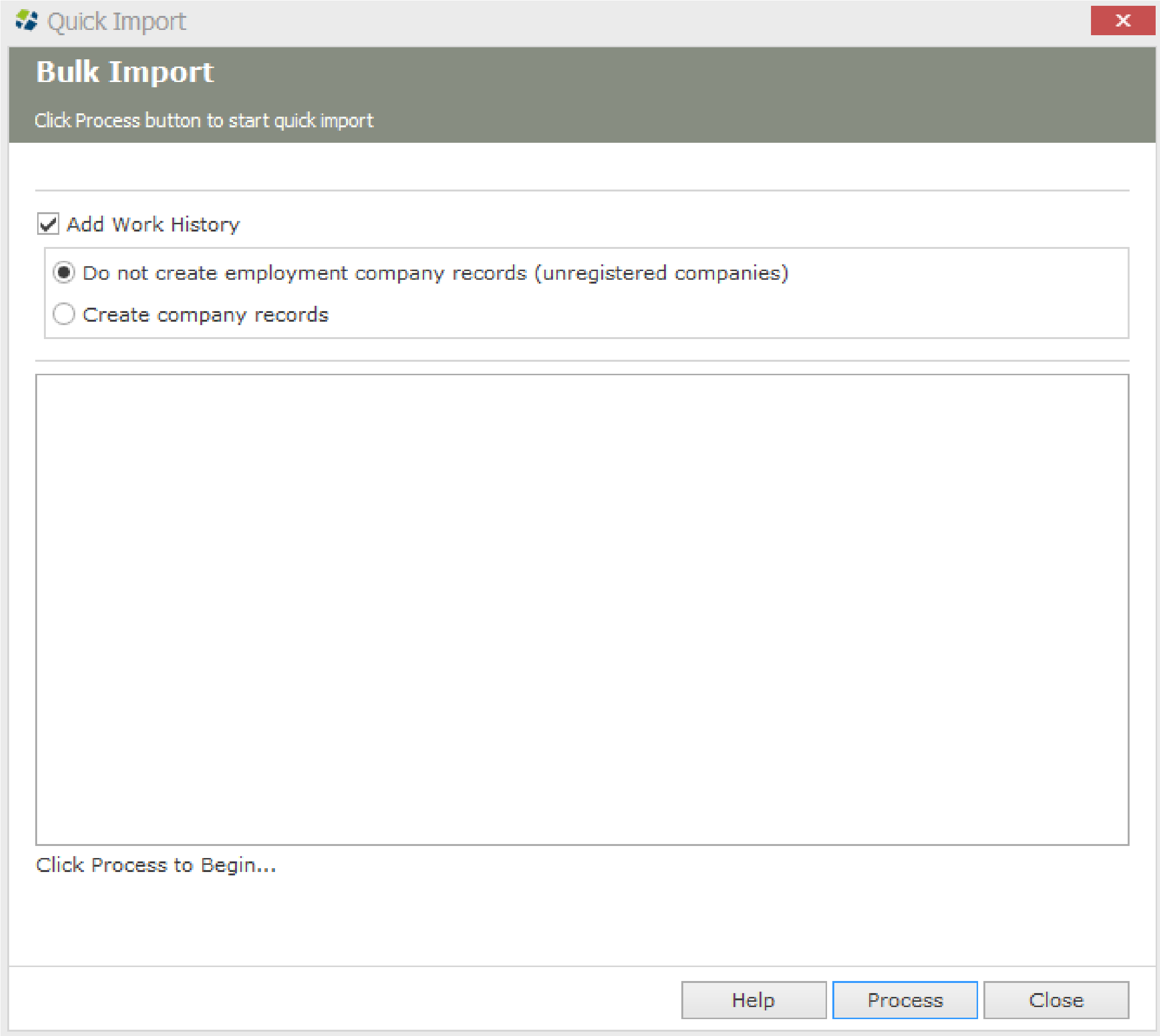
  - **If a log is associated with multiple people a warning will show allowing you to delete for the individual only or all associated individuals**



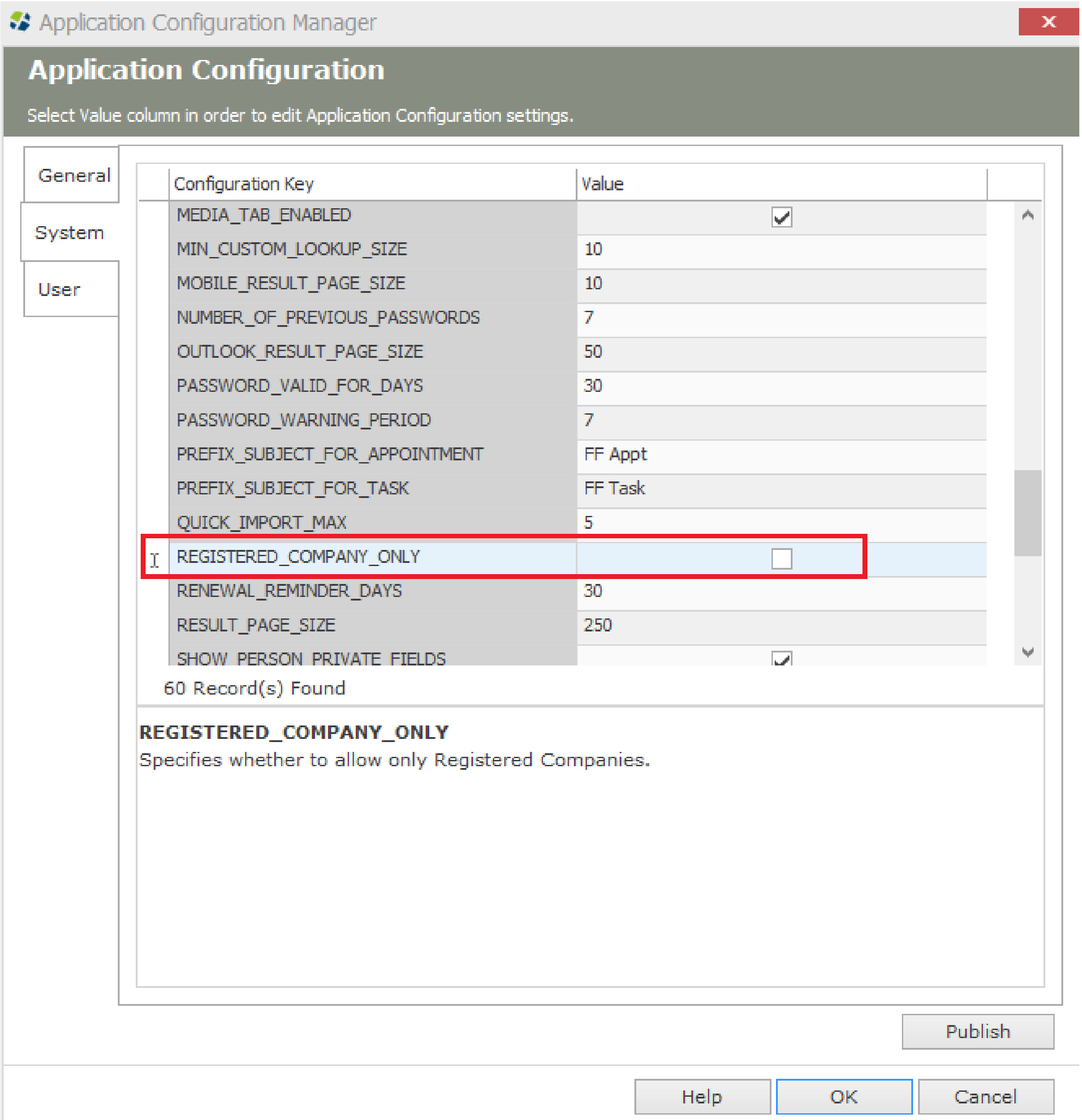
- **A new "Can Delete Log" permission has been added to Role Manager in Admin. This allows users to delete logs in FileFinder. By default, this permission is set to "Off" so logs cannot be deleted**



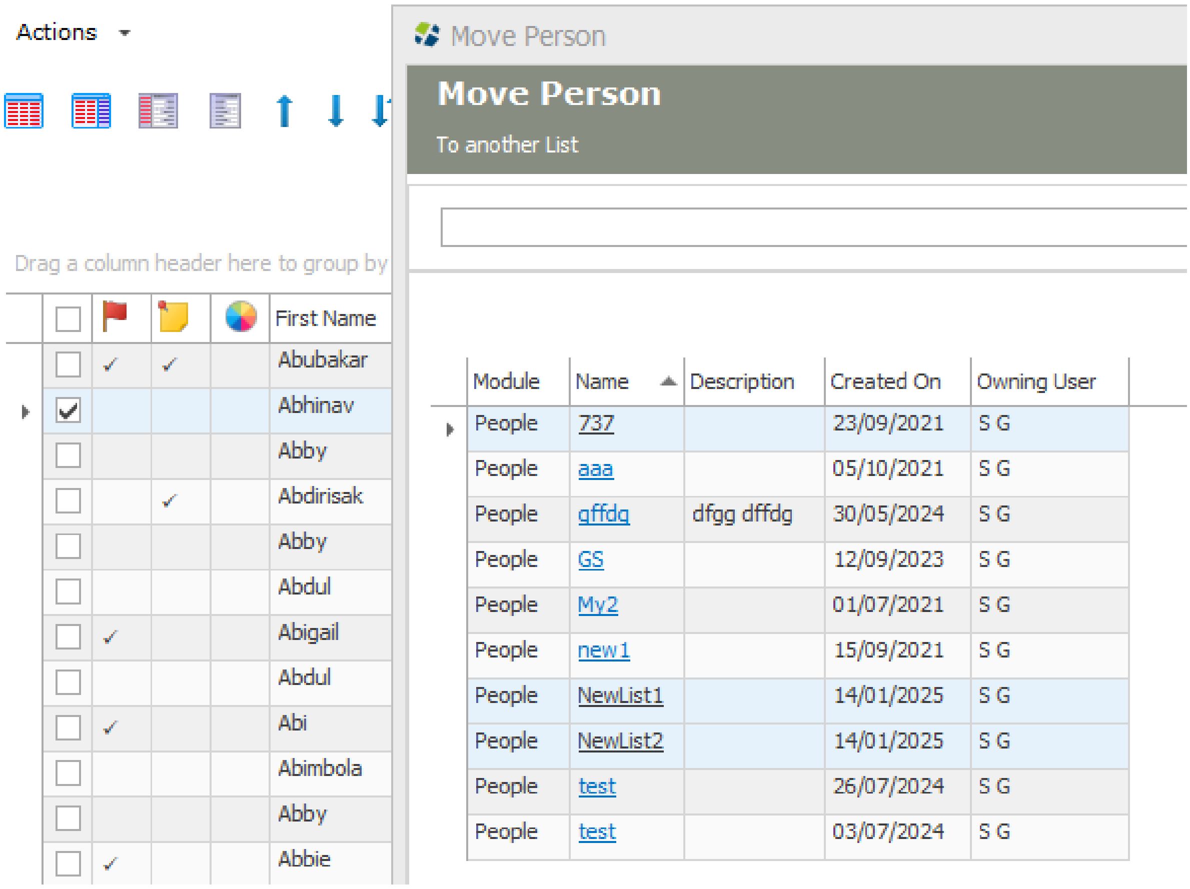
- **Added option for unregistered companies in spreadsheet Import (Bulk Import)**
  - Users can now add unregistered companies in spreadsheet (CSV) import
  - Unregistered companies allow users to not create duplicate company records in the database
  - This applies when importing Person and Company records together on a single spreadsheet



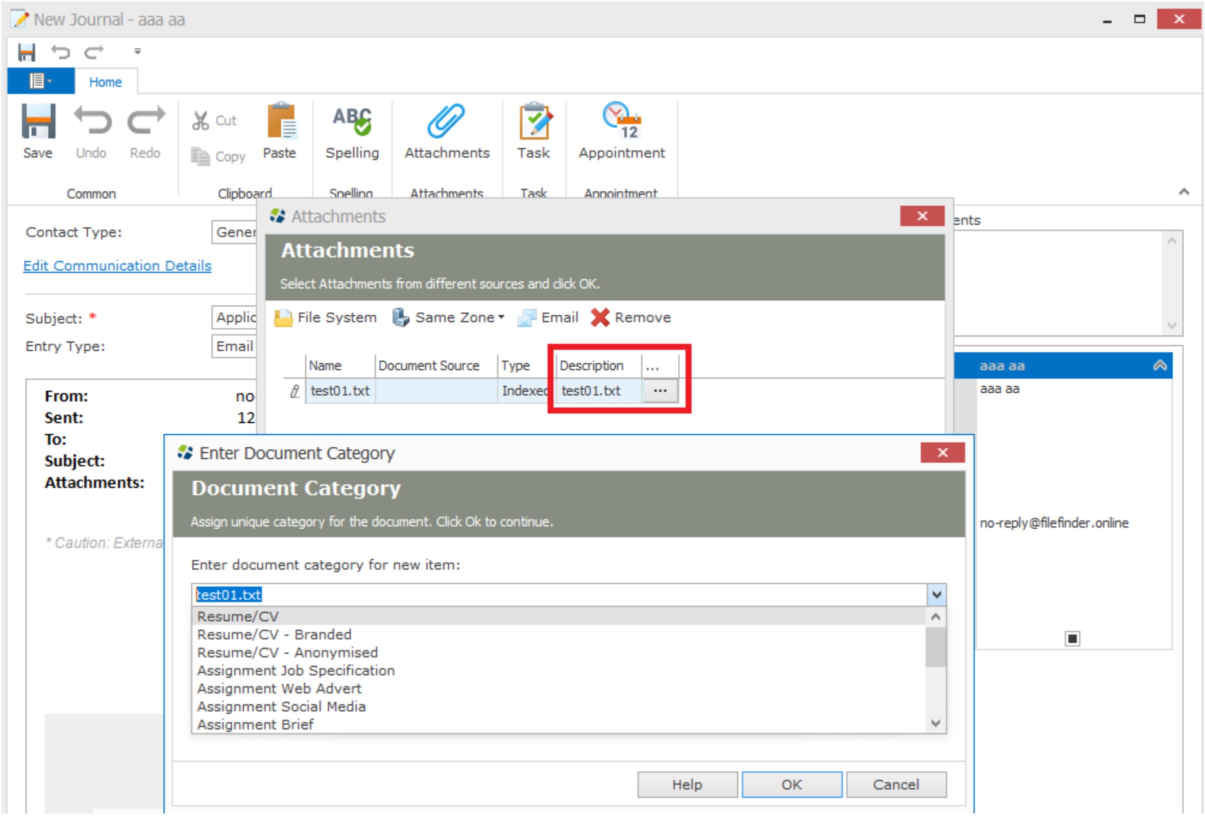
- ***Note: The "RESGISTERED_COMPANY_ONLY" key needs to be set to off in FF Admin Application Configuration settings for this option to show***



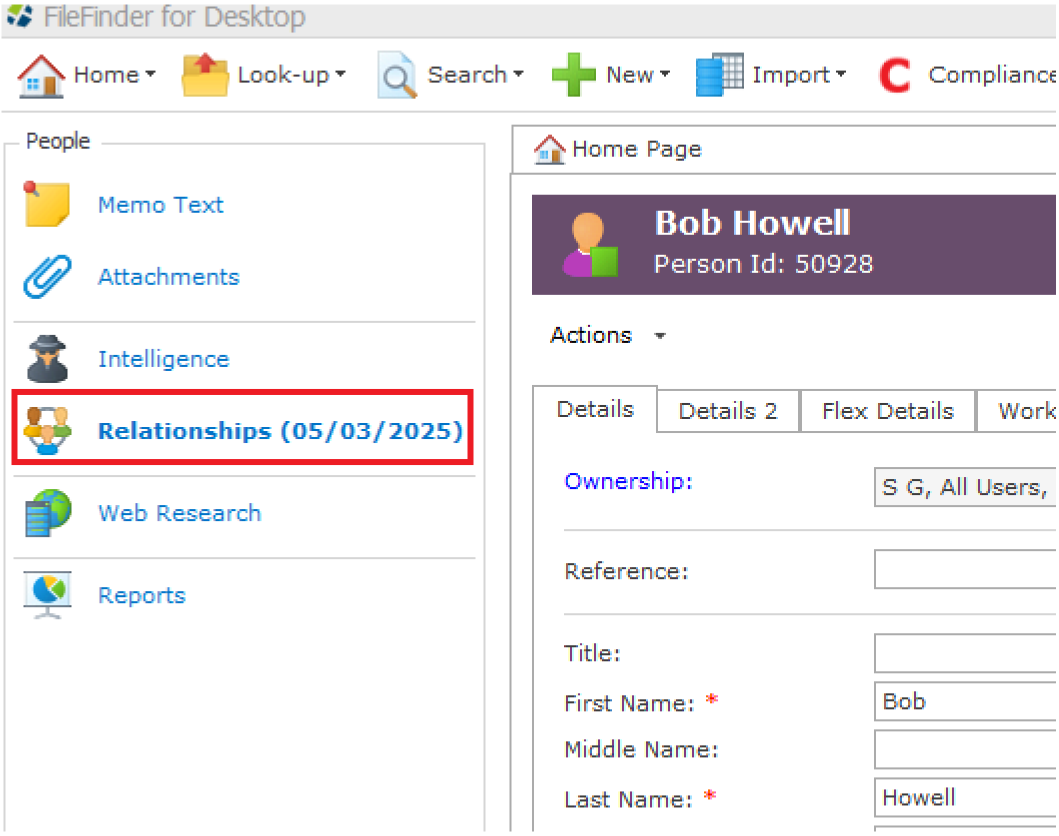
- **Users can now copy a single person to multiple lists**
  - Users can highlight multiple lists from the Move Person screen and the person will be added to all lists selected at the same time

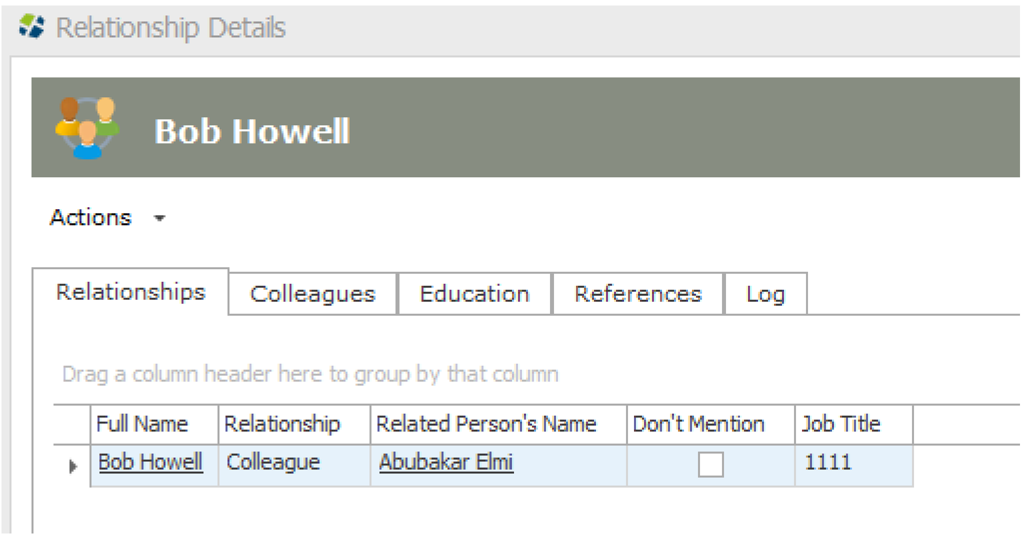


- **Document Category can now be set when logging an email from Outlook**
    - When using "Log email in FF" from the Outlook Add-in you can set the Document Category for any incoming attachments. Previously, it was set to the document name by default and could not be changed

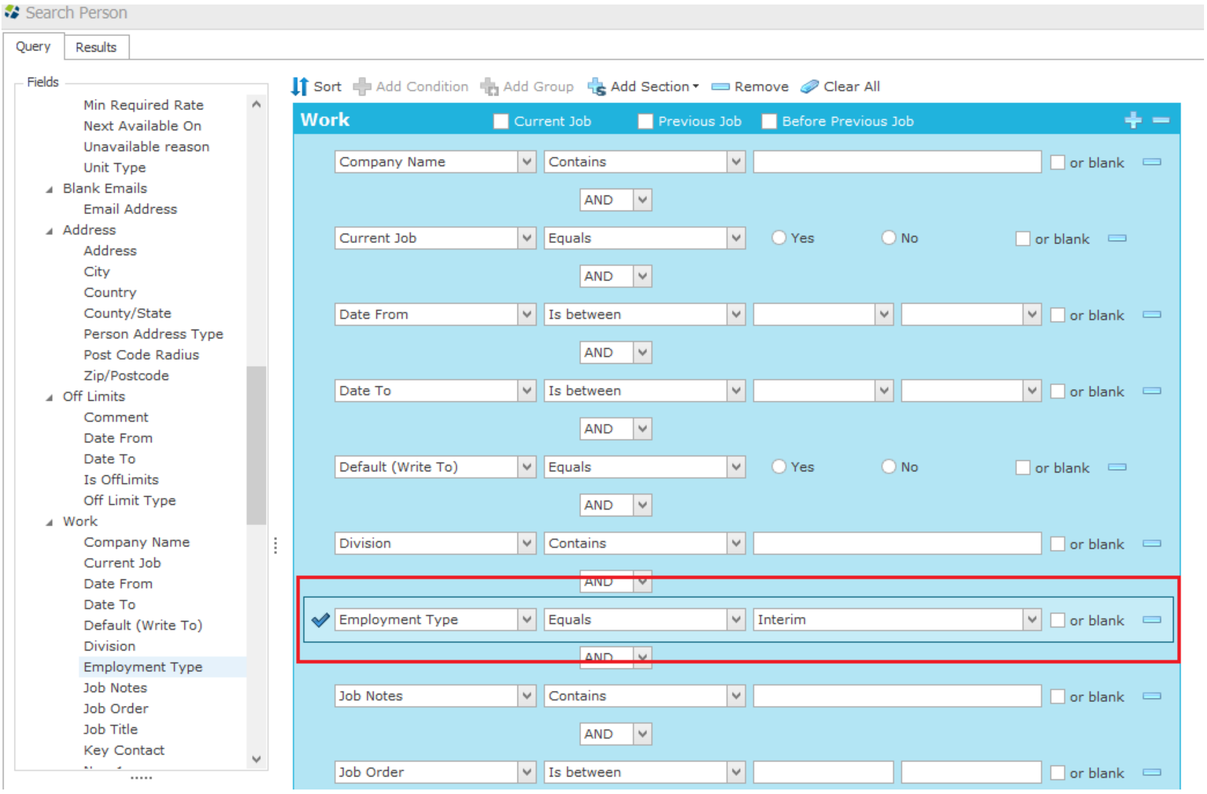


- **Relationship link on a Person record will appear in bold if an active relationship exists**
  - Allows users to see if there is an active relationship for the person record
  - The date of the last added relationship will also be shown

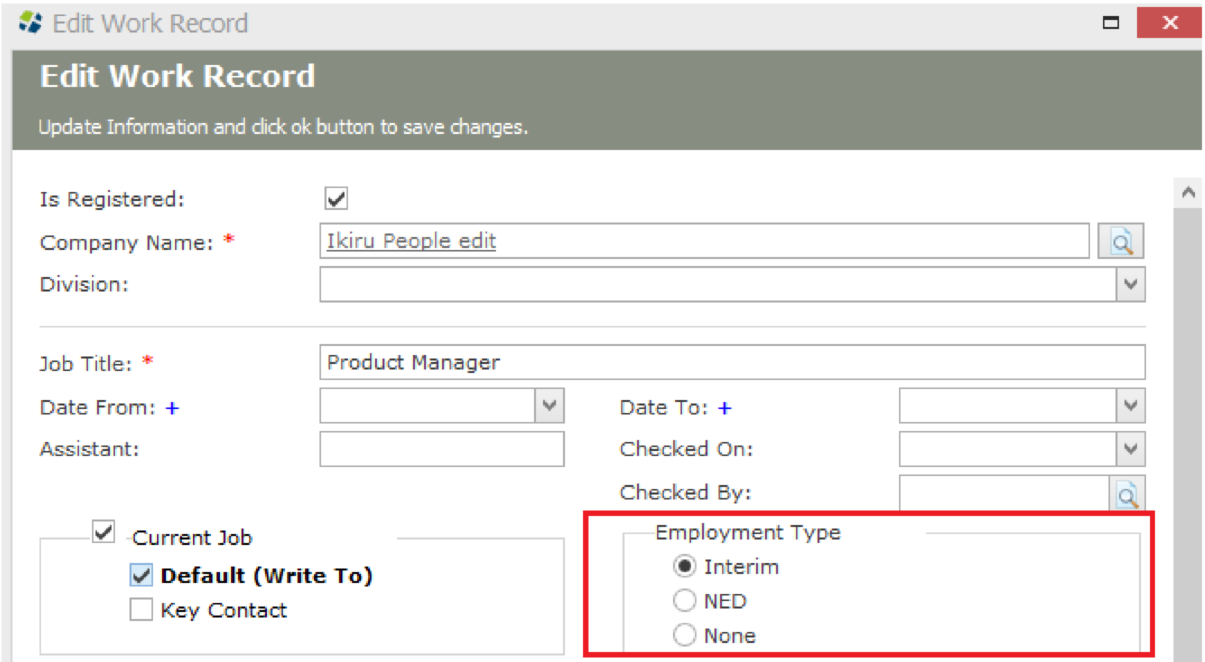




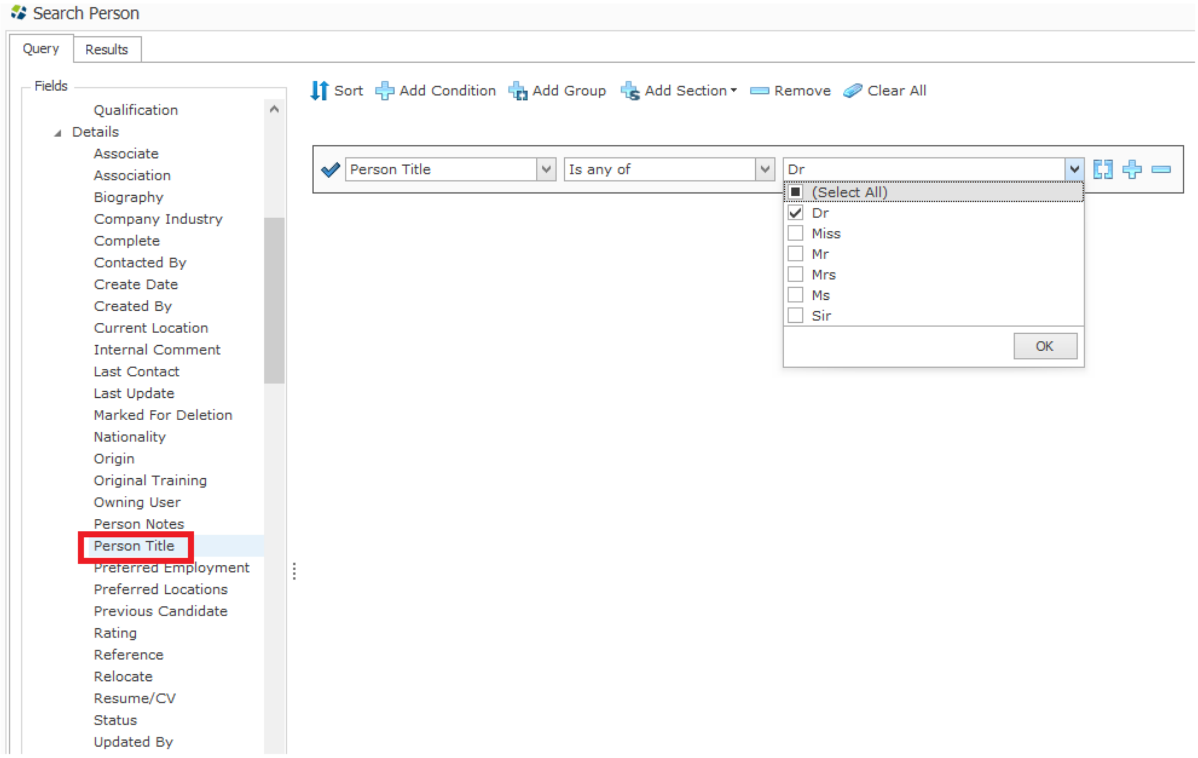
- **Work Record "Employment Type" field is now added as searchable field in Person Search under the Work section**



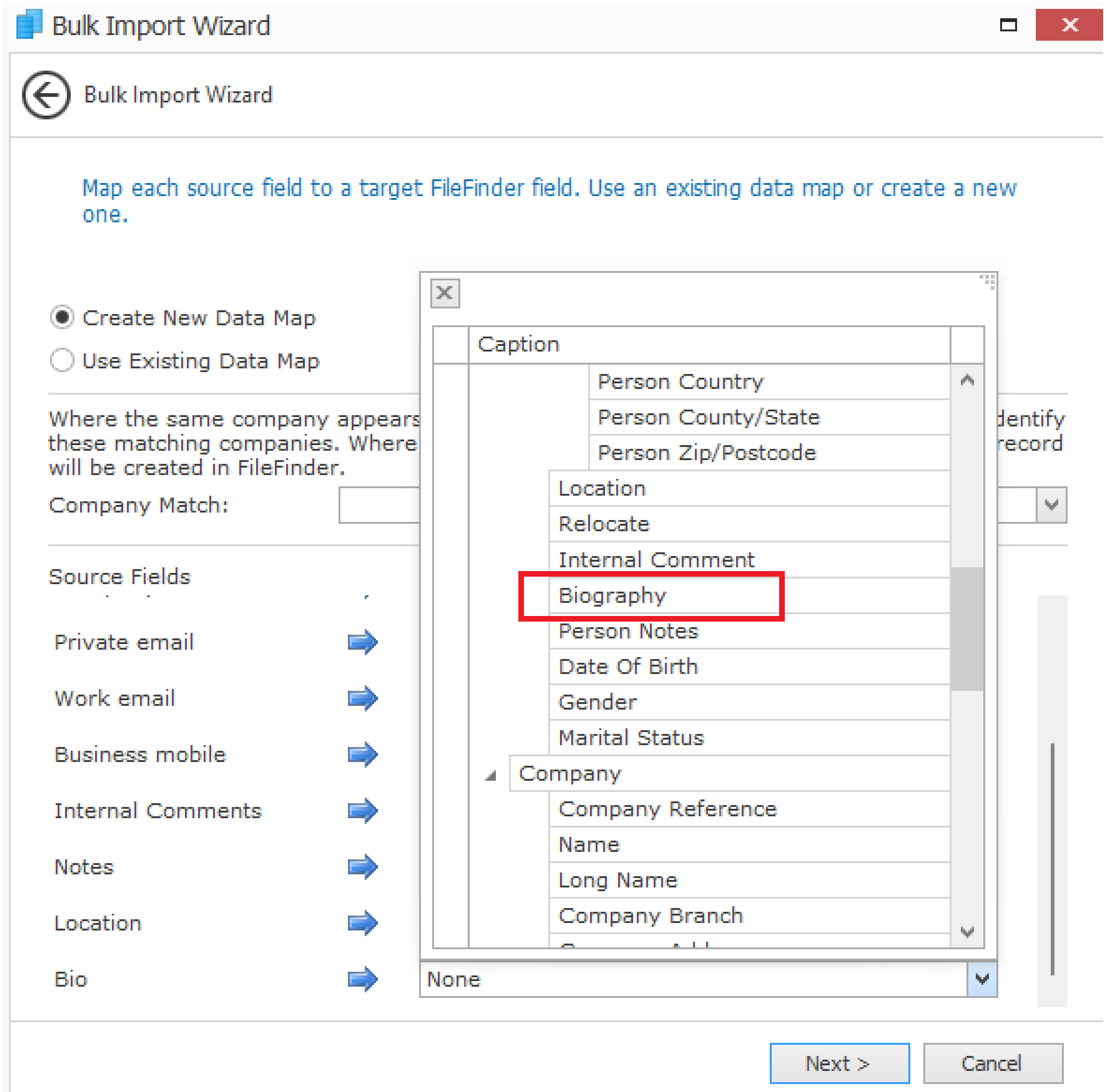
- **Allows users to search Employment Type (Interim, NED or None) from the Edit Work Record screen**



- **"Person Title" field added in Person Search**
    - Allows users to search on a person's Title from the Details tab in FileFinder



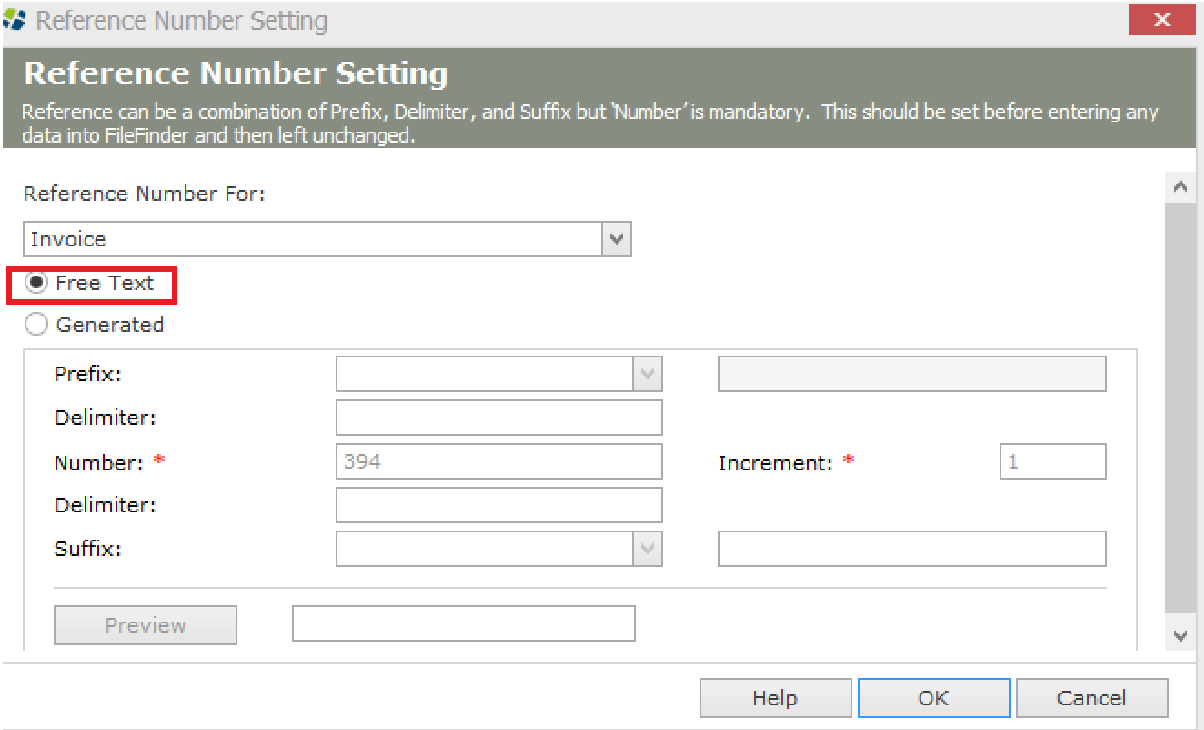
- **"Biography" field added as a mappable field in Bulk Import**
    - Allows users to import a biography for Person records when importing spreadsheets into FileFinder



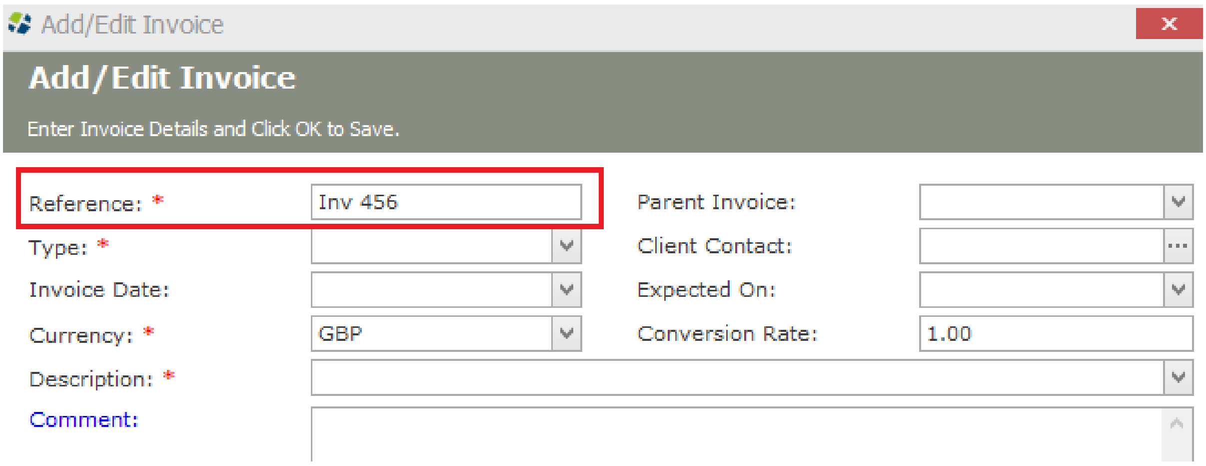
- **Assignment Type column added to Assignment lists**
    - "Assignment Type" column will be part of the System Default view

	Company	Assignment	Registered	Status	Assignment No	Reference	Attachment Date	Owning User	Assignment Type
☑	Ikiru People edit	Daud test 1	14/12/2020	Started	1994			S G	new2
☐	Ikiru People edit	Ikiru Test Assignment	14/12/2020	Assign - Active	1993	IKR	02/07/2021	S G	New Account edit 11111
☐	M&G	test	01/02/2021	Started	1997			S G	
☐	DSM Demolition	test	21/10/2021	Started	2005			S G	
☐	MobComp2	test	05/10/2021	Started	2000			S G	
☐	Ikiru People edit	test	02/12/2022	Started	2015			S G	
☐	m&s	test	18/01/2021	Started	1996			S G	
☐	test123	test	27/10/2020	Started	1991			S G	
☐	Ikiru People edit	Test	31/03/2021	Started	1998			S G	
☐	Test 12345	test 123	08/08/2023	Assign - Active	2030			S G	
☐	Ikiru People edit	test assing	13/10/2021	Started	2003			S G	
☐	Ikiru People edit	test1	10/03/2023	Started	2017			S G	
☐	Ikiru People edit	test3	17/12/2020	Started	1995			S G	

- **Ability to turn off auto generation of Invoice reference numbers**
    - Users can now turn off auto generation of Invoice reference numbers using the Auto Numbering option in FileFinder Admin and selecting "Free Text"



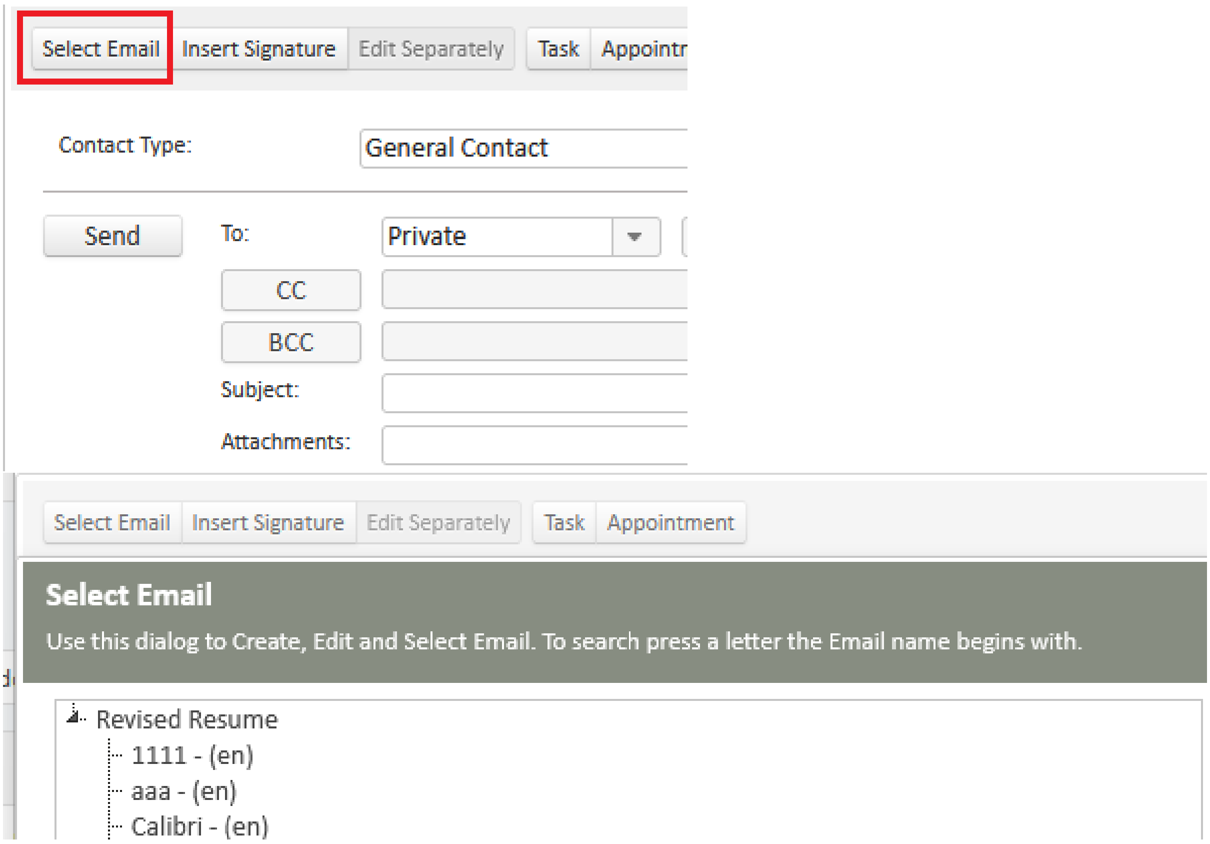
- **This allows users to add their own Invoice Reference number when creating a new Invoice in an Assignment**



- **"Paid On" date added to Assignment Invoices infobox**
    - "Paid On" date column has been added to the Assignment Invoices infobox
    - Users can also Sort and Filter by this column when creating a custom view for this infobox

Total Amount	Paid Amount	Paid On	Created On
100	0	08/01/2025	10/01/2025
10800	10800	06/03/2017	15/12/2016
3328.2	3328.2	24/02/2017	31/01/2017
9900	9900	07/02/2017	17/11/2016
9900	9900	01/02/2017	01/12/2016
15300	15300	01/02/2017	02/11/2016
5400	5400	01/02/2017	13/01/2017
3480	3480	01/02/2017	13/12/2016
10800	10800	20/01/2017	07/11/2016
14472	14472	20/01/2017	18/11/2016
7200	7200	21/12/2016	16/11/2016
14400	14400	21/12/2016	17/11/2016

- **FileFinder Browser Email templates are now accessible from the FF O365 app**
  - The option to select Email Templates has been added when using "New Email and Log in FF" and "Reply and Log in FF"



Bug Fixes

CV parsing not pulling Person qualifications correctly from Resume/CV When parsing a Resume/CV it does not pull the correct qualifications from the document being parsed. This has been resolved.
Creating new person with Quick Import from Add New closes FileFinder Create a new person and click on Create from Web. Find the person on LinkedIn and click the More button, then Save to PDF. You get the usual Save, Attach, Import options and Quick Import. All options work except Quick Import. If you click it, it says " Cannot Connect to server". If you click OK, then FileFinder closes. The record is created but nothing is imported. This has been fixed
Duplicate placed log If a candidate is Placed and you create a new log for them, it adds "Placed" to the New Progress field. If the user does not manually remove this, it will create a new (duplicate) “Change of Assignment Candidate Progress” log as well as the log they are creating. This has been fixed
Skills Mapping crash Admin Customization > Click Skills Mapping Crash This feature has now been removed as auto keyword skilling is enabled by default when parsing a Resume/CV
Admin Localization not working When adding Localization text for picklists it does not work. It looks like it is putting the German value into the English localization field. However, in the front end the picklists are not translated when switching languages. This has been fixed
Country picklist not being translated

I have a German client who is creating address labels, and they noticed the country name is in English (i.e. it says Germany instead of Deutschland). I connected to their FileFinder and switched to German and checked an address and it's using the English picklist instead of the German one. This has been fixed
Company Merge issues When you Merge two company records, the Branch and Ranking fields do not come through. Merge two Companies Select Branch and Ranking on the duplicate record Select Merge The Branch and Ranking still shows the original values This has been fixed
Unable to Import PDF in Web Profiles from the Outlook Add-in Outlook Link Person record Open in FF Open Web Profile on Summary tab Click Save PDF Import Shows "No Data to Import" error This has been fixed
Browser Email signatures issues Fixed the following issues with Browser signatures: 1. Signature is added automatically when composing a new email, it should show only when clicking on the Insert Signature option 2. Signature cannot be removed once added 3. Clicking Images freezes Browser 4. Font is not consistent when clicking in the field
FileFinder for Mobile not setting company Switchboard or URL as default Open an existing Company record in Mobile Click Edit Add Switchboard and URL Refresh > Switchboard and URL do not show (They are not set as default)

This has been fixed
Placed Candidate screen issues Fixed layout issues and Off-Limits icon not appearing on the Placed Candidate screen