



How to Add and Remove Company Contacts

The screenshot shows the 'ABC Contract Services Aber' application window. The left sidebar contains a navigation menu with options like 'Contacts', 'Contact Events', 'AWR', 'AWR Closures', 'Vacancies', 'Progress', 'Placements', 'Questionnaire', 'Contact Questionnaire', 'Installation Qs', 'General Notes', 'IT Notes', 'Group', 'Miscellaneous', 'Accounts', 'IT Qs', and 'Documents'. The main area is divided into two panes. The top pane shows the details for a contact named 'Liliana Vega' under the 'BR Derby' division. The bottom pane shows a table of contacts.

Call Back Date	Name	Status	Primary	Site Address	Job Title	Note	Department	Start Date
22/06/2016	Liliana Vega	Client	<input checked="" type="checkbox"/>		Credit Control Con...			16/05/2013
	Isobel Frey	Client	<input type="checkbox"/>		Human Resources			
	Sonny Wyatt	Client	<input type="checkbox"/>					

To add other contacts to the company details:

- Click on the Add button.
- Enter the required information top right.
- Click on the Save & Refresh button to save the new contact to the list at the bottom of the screen.

To remove contacts from the company details:

- Contacts will not be removed but archived from view.
- Select the relevant contact and use the Leave button if a Contact leaves to end the employment - you can also attach to a new Company.
- It can be used in advance - until the Leave date is reached the Contact will be viewable.
- Use the Include Former to see Contacts who have left - all their Vacancies and Contact Events remain attached.

Adding further company contacts

You can add other contacts to the company details.

- Click on the **Add** button.
- Enter the required information and complete questionnaire where relevant.
- Click **Save & Refresh** to add the new contact to the list at the bottom of the screen.



(2.20.2+) You can also add an accounts contact directly within the company Miscellaneous (often renamed to Account Setup) view rather than having to go back to the Contacts view.

If the accounts contact is not yet in IQX click on the elipses at the end of the Accounts Contact field and use the Add Contact button.

Group Tree	* Account Code	8081
Miscellaneous	* Accounts Contact	Jeremy Fisher
	Credit Limit	100

Select Contact

Name	Position	Status
Abdula Abdul		Client
Jeremy Fisher	Boatman Extraordinaire	Client
Bertha Jenkins	Dezizzer	Client
Scott Mc		Client
Mr R Plumber	Managing Director	Client
Jemima Puddleduck	Quackers	Client
Unde Rat	Dirty	Client
hazel thorburn	Boss	Client

See also:

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