Company Groups

Companies can be grouped together so that hierarchies and branches can be visibly linked - this is done in the Group view. The group may be used for reporting, and also for withholding candidates from an entire group (done from Person, History View see also Person History).

The group view shows the name of the opened record in blue text.

You can add a Parent or Subsidiary by name search and select or add new.

The other records are shown in black, in a tree to display the hierarchy.

The Expand button will open the selected record.

In a subsidiary record, the Group Head will now appear above the company name on the record to show that it is in a group.

In the Group view a button to detach from the parent is visible.

Reports can be altered to add a Company Group level.

There is a report to detail what groups exist.

Search criteria can be added to find Group Heads.

See also Contact Trees
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Last update: **2017/11/16 21:58**