



# Company Record

From here you can view all your Company/Client details and make any amendments to the record.

The screenshot shows the iqx software interface for viewing a company record. The window title is '10 Group PLC'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation links such as Sales, Consultant, Contacts, Contact Events, AWR, AWR Closures, Vacancies, Placements, Questionnaire, View 1, Notes, Group Tree, Miscellaneous, Accounts, View 2, Documents, Temp Details, Location Map, Audit Trail, AWR Audit Trail, Modify Screen, Warning, and Popup Consultants.
- Main Content Area:**
  - Division:** Legal Recruitment
  - Name:** 10 Group PLC
  - Address:** 36 George Street, EDINBURGH, EH39EG
  - Phone:** (field with ellipsis)
  - Account Code:** 11 (Invoice)
  - Invoice Address:** 36 George Street, EDINBURGH EH39EG...
  - Alert:** (field)
  - State:** Client
  - Contact Details:** Primary, Un-Subscribe to..., Sales Consultant, Direct Phone, Mobile, E-mail, Direct Fax (all fields have ellipses).
- Buttons:** Select, Add, Contact Tree, Person, Leave, Include Former, Include Temps, Include Placed, etc.
- Table:** A table with columns: Name, Status, Primary, Position, Sales Consultant, Note, and Department. It lists two contacts: Ashley Bailey (Client, Primary, MEENA) and Meena Brock (Client, Primary).

## Contacts

This will list all the Company Contacts. [To learn how to add new Contacts click here](#)

## Contact Events

In here you will find all associated contact event for the Company. You can also create new contact events, appointments or reminders from this view.



## **AWR + AWR Closures**

This is where the AWR rules/information are input and maintained. [To learn more click here](#)

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## **Vacancies**

In here you will find all the vacancies for this particular Company/Client. From this view you can view both current and historic vacancies, add shifts, add a new vacancy, perform a count of all vacancies and process vacancies.

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## **Placements**

Similar to the above, this is where you can view all the Placements that are associated with this Company/Client. In this tab you can expand the placement and make any amendments, open the Persons Record, view all placements for all company contacts and not just the contact that has been selected. Perform a count of all placements and process Temps.

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## **Questionnaire**

This is where you will find and maintain information relating to criteria such as Industry, Location, number of employees, the last date terms & conditions were sent etc. [Click here for more info on setting up Questionnaires](#)

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## **Contact Questionnaire**

As above, only this information is relating to the Contact.



## Notes

In this tab you can insert text or free type any information that is relevant to the Company or Company Contacts. This will be seen by all that have access to Company records.

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## Group Tree

This view allows you to connect one contact with multiple companies. [click here to learn more](#)

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## Miscellaneous

This is where you can view and maintain accounts information such as Account code, Contact, credit limit ect. You can also set the Company/Client to work with E-Timesheets from this view.



10 Group PLC

Navigation: Reports, Delete, Lookup Address, Help, Portal

**Sales**

- Consultant
- Contacts
- Contact Events
- AWR
- AWR Closures
- Vacancies
- Placements
- Questionnaire
- View 1
- Notes
- Group Tree
- Miscellaneous

**Legal Recruitment**

**Client**

**Contact**

Primary ☐  
Un-Subscribe to... ☐  
Sales Consultant  
Direct Phone  
Mobile  
E-mail  
Direct Fax

**Companies House**

* Account Code	11
* Accounts Contact	Kay Atkinson
Credit Limit	
* Days Credit	14
Override IR35	<input type="checkbox"/>
Allow PAYE	<input checked="" type="checkbox"/>
Allow Limited	<input checked="" type="checkbox"/>
Allow Limited External PAYE	<input checked="" type="checkbox"/>
Managed by Portal	<input type="checkbox"/>
* Invoice Frequency	Weekly
Company Reg. No.	
Invoice This Record Address	<input checked="" type="checkbox"/>
Invoice Address	36 George Street, EDINBURGH EH39EG
On Stop	<input type="checkbox"/>
E-Timesheets	<input checked="" type="checkbox"/>
Not Ltd. Company	<input type="checkbox"/>
Timesheet Contact	
Their Ref Required on Timesheets	<input type="checkbox"/>
Invoice Distribution	Post
Web Contract Start Date	
Invoice exclude Images	<input type="checkbox"/>
Construction	<input type="checkbox"/>

## Accounts

When you click on this tab it will open a new window, from here you can access another Miscellaneous view. This holds the details for things like Vat number and status, WTR percent, AWR NI percent, invoice email ect.



Account Code - 11 10 Group PLC	
Save And Close Abandon Update Send Statement Reports New Invoice Address	
Miscellaneous	Companies House VAT Number
Accounts	* Accounts Contact Kay Atkinson
Contact Events	Group Timesheets on Invoice One invoice for each Timesheet
	Invoice Management Group
	Invoice Address 36 George Street, EDINBURGH EH39EG
	VAT Number
	VAT Status Standard
	ERNI on Invoice <input type="checkbox"/>
	Fixed NI percent
	WTR percent
	AWR NI percent
	AWR WTR percent
	Invoice E-mail temps@iqx.co.uk
	Statement E-mail
	Override Invoice Layout Sales Inv Shifts 2
	Invoice exclude Images <input type="checkbox"/>
	Invoice PDF exclude Timesheets <input type="checkbox"/>
	PDF must have Documents None
	PDF Security
	Account Code Name 10 Group PLC
	Statement Frequency None
	Invoice Terms from invoice date

Clicking on the Accounts tab in this window will give you access to the invoices for this Company/Client. From here you can create new invoices, credit notes, make payments, refunds, journal entries, allocations and write offs. There are radio buttons which allow you to view 'Outstanding' invoices only or 'All' and you can also expand the invoices to view the details within.

Account Code - 11 10 Group PLC	
Save And Close Abandon Update Send Statement Reports New Invoice Address	
Miscellaneous	Type Our Ref. Their Ref. Date Amount Outstanding Internal Ac
Accounts	Credit Note 11744 07/06/2022 -1,201.20 -1,201.20 <input type="checkbox"/> 11
Contact Events	Credit Note 11745 07/06/2022 -5,280.00 -5,280.00 <input type="checkbox"/> 11
	Journal 1 1GGGGG 21/01/2022 -142.50 -142.50 <input type="checkbox"/> 11
	Refund 111 10/11/2021 10,268.54 10,268.54 <input type="checkbox"/> 11
	Invoice 11731 13/10/2021 1,201.20 1,201.20 <input type="checkbox"/> 11
	Invoice 11721 01/10/2021 7,500.00 817.60 <input type="checkbox"/> 11
	Invoice 11722 01/10/2021 7,500.00 7,500.00 <input type="checkbox"/> 11
	Invoice 11724 01/10/2021 1,201.20 1,201.20 <input type="checkbox"/> 11

Start Date 11/07/2021

Current Balance 14,364.84

View Transactions: ☒ Outstanding ☐ All

Expand

Invoice  
Invoice (T)  
Credit Note  
Credit Note (T)  
Payment  
Refund  
Journal  
Allocation  
Write Off

You can also access the Contact Events for this Company/Client from this window.



## **Documents**

This is where you will find all Company related documents. You can expand and view them, add new documents, delete or archive them from here.

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## **Temp Details**

This is where you can view and edit items such as Temp Charge Code, Shift code and holiday code.

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## **Location Map**

This will display a map of the Company/Clients location.

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## **Audit Trail**

In here you can see all changes that have been made to the Company/Client record (providing they have been set as auditable items). This will give you details about what change was made, the date and time of the change, who made the change as well as the old and new values of what was changed. This can be very useful in tracing back anything that has been done in error.

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## **AWR Audit Trail**

As above this will track any changes made to the AWR of the Company.

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## Modify Screen

If set up by your Agency this will allow you to customise the overall view that you see by hiding certain things from view, if it's not essential that you can see them.

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## Warning

You can set a warning to pop up on the opening of this Company/Client record, simply by free typing your warning into the box and updated the record.

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## Popup Consultants

In here you can set up which consultant will receive the popup that are generated from the Web portal.

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[Back to Getting Started](#)

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