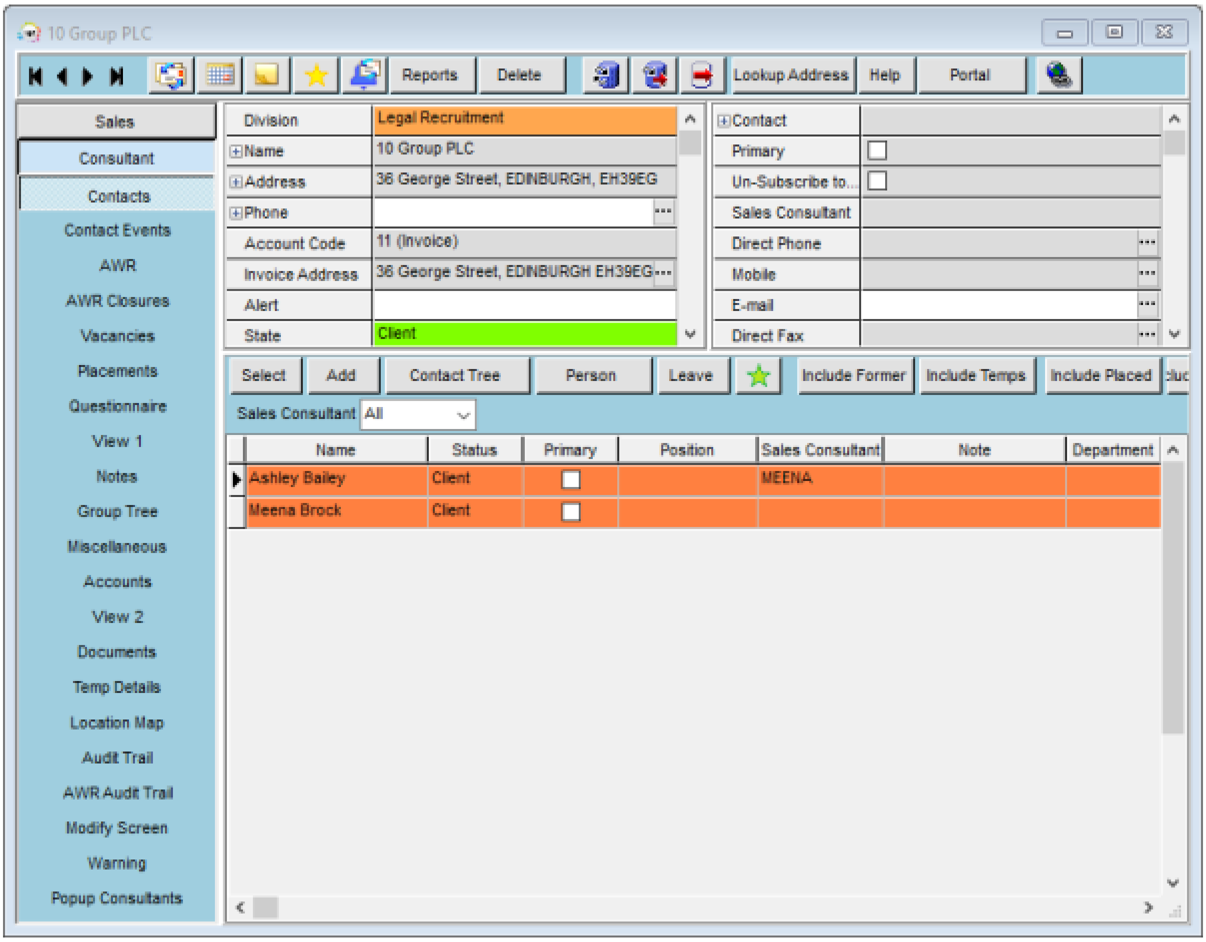
Company Record

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



Contacts

This will list all the Company Contacts. To learn how to add new Contacts click here

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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.

Placements

Similar to the above, this is where you can view all the Placements that a re 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.

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

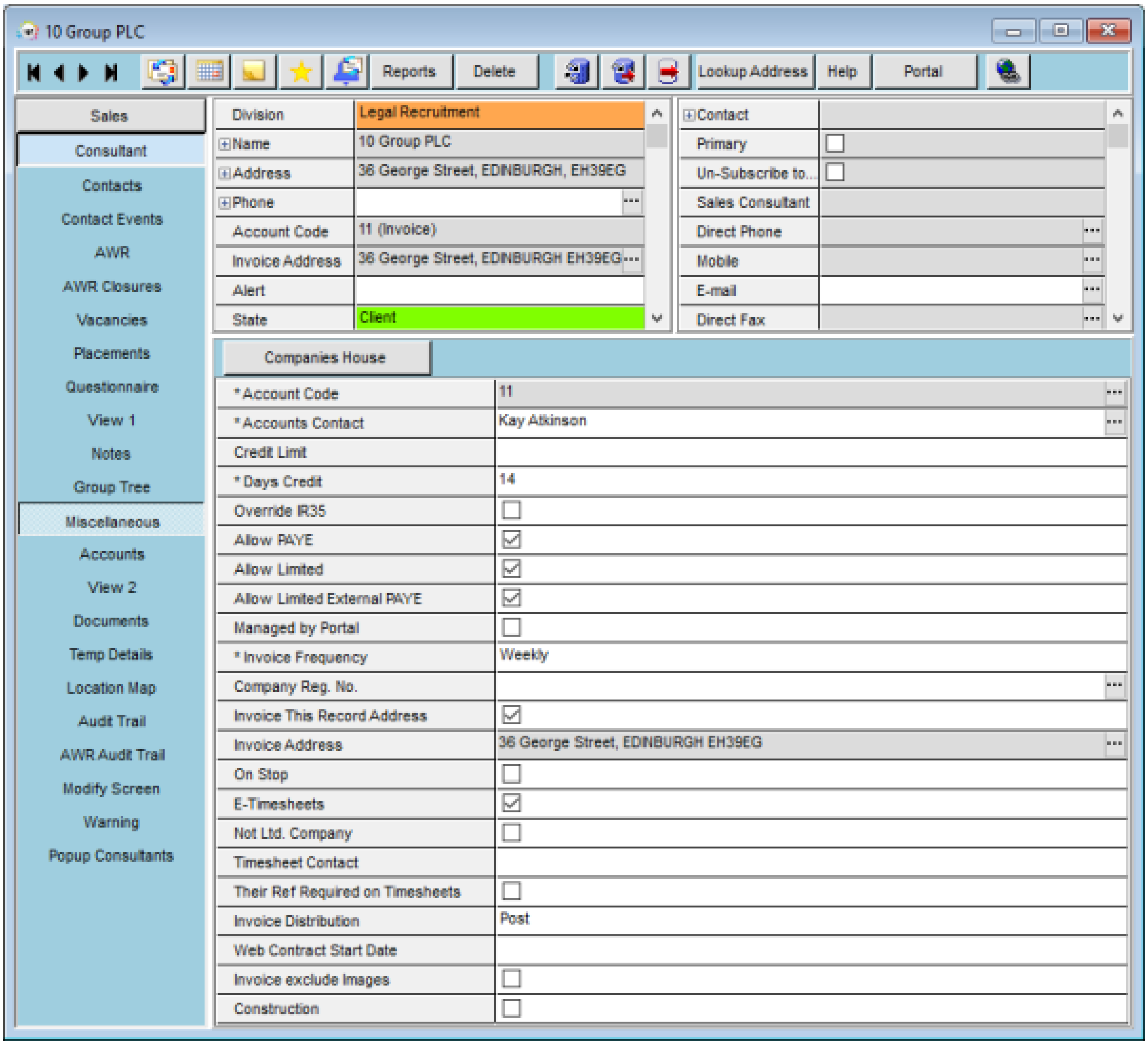
In this tab you can insert text or free type any information that is relevant to the Company or Company Contacts. This will be seen by all that have access to Company records.

Group Tree

This view allows you to connect one contact with multiple companies. click here to learn more

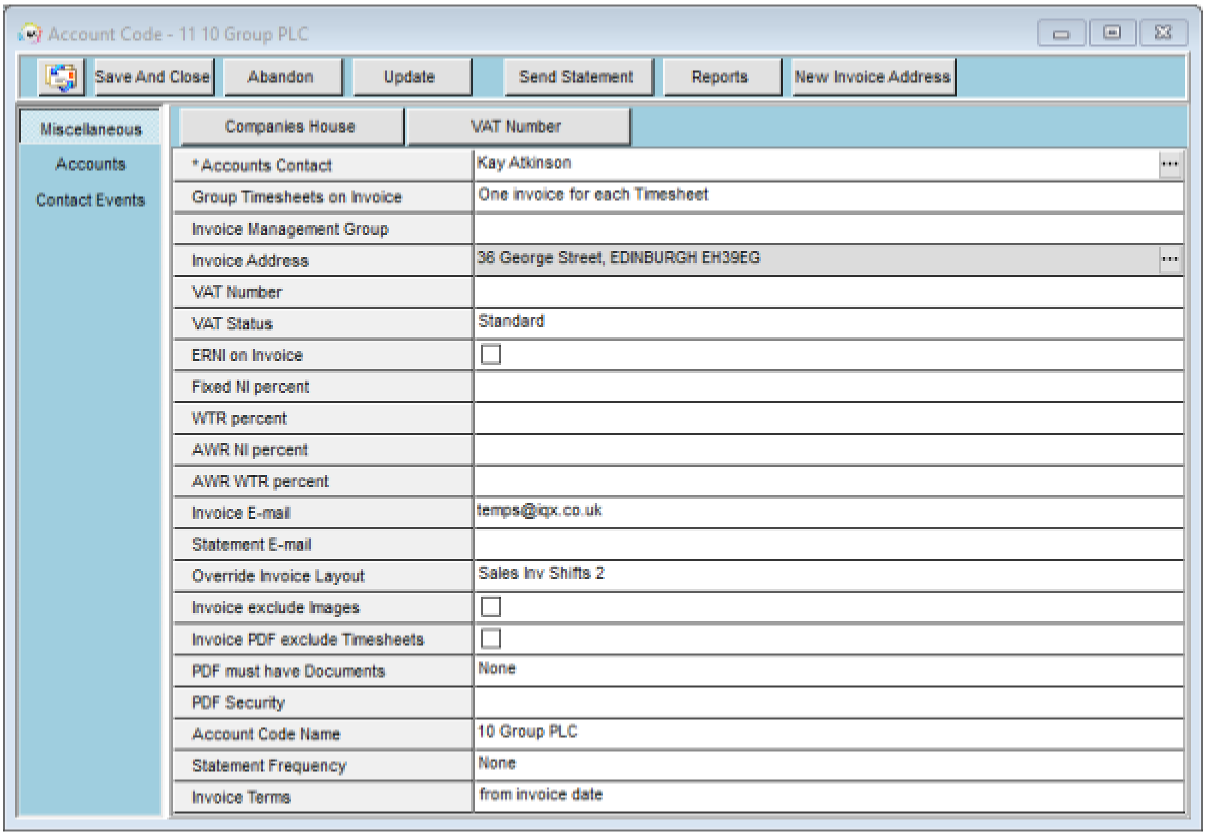
Miscellaneous

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.

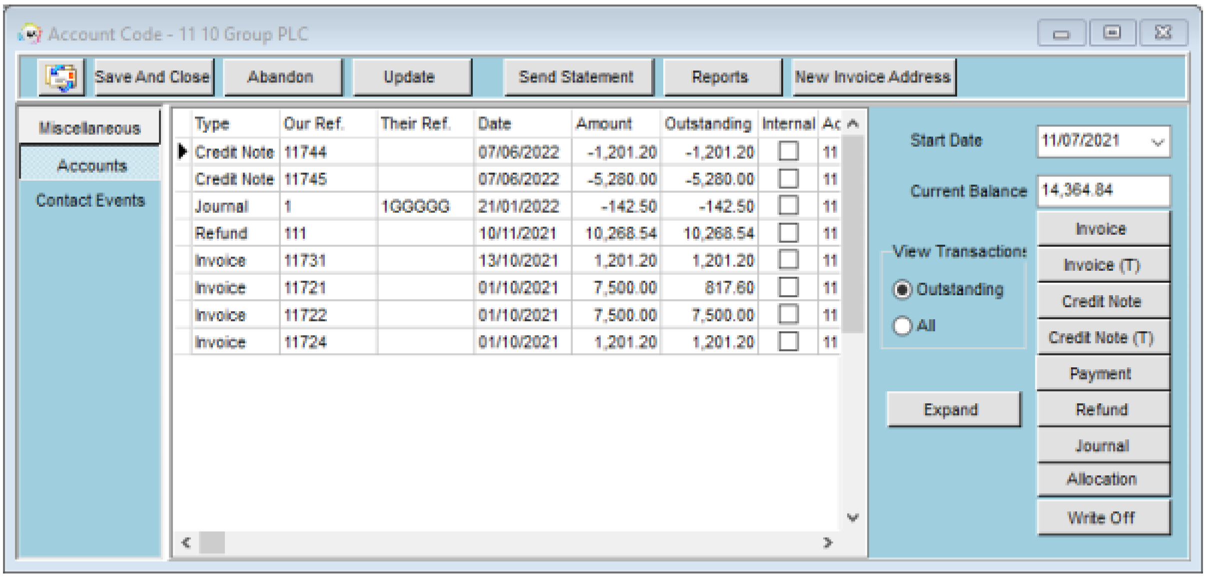


Accounts

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.



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.



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.

Temp Details

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

Location Map

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

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.

AWR Audit Trail

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

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.

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.

Popup Consultants

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

Back to Getting Started