



How to add a New Company Record

To add a new company: Open the company selector by clicking on the Companies icon.

Click on the New button. A screen similar to the following one is displayed.

Click on the + button to expand a section and enter the company's details.

Keyboard shortcuts

Key	Use
Tab or Return	Moves you through the questions, expanding each level
Up & down arrows	Moves you through the question without expanding levels
Left & right arrows	Collapses or expands a level, unless it is a text field
Space bar	Ticks or clears a box
Ctrl & character	In a long list this takes you to the next word that starts with that character

The information that you are asked for depends on what has been requested by your company. There will be some fields which must be entered. When you have input the information against all the relevant and necessary fields, click on next.



The next screen requires you to enter the first contact person's details, again the information you are asked for depends on what has been requested by your agency.

When you have entered all the information click on the Finish button.

This will open the created Company Record.

The screenshot shows the 'ABC Contract Services Aber' application window. The left sidebar contains a tree view with categories 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 details for 'Liliana Vega' with fields for 'Division' (ABC Contracting Services), 'Group Head' (ABC Contract Services Aber), 'Name' (ABC Contract Services Aber), 'Address' (Alford Lane, ABERDEEN, AB21 9HS), 'Web Site', 'Phone' (01632 806 523), 'Alert', 'State' (Client), 'Current Placeme' (2), and 'Consultant'. The bottom pane shows a table of contacts with columns: 'Call Back Date', 'Name', 'Status', 'Primary', 'Site Address', 'Job Title', 'Note', 'Department', and 'Start Date'. The table contains three rows: 'Liliana Vega' (Client, Primary, Credit Control Con..., 16/05/2013), 'Isobel Frey' (Client, Human Resources), and 'Sonny Wyatt' (Client).

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

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