Adding a Company

Refers to:
Companies form (top menu)

To add a new company:

- Click 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.

Keystroke	**Use**
Tab or Return	Moves you through the questions, expanding each level.
Up and down arrows	Moves you through the questions without expanding levels.
Left and 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, but should include some or all of the following:

Name	The name of the company
Keyname	This is generated from the names that you enter. You can edit this to reflect the way that the company works, e.g. put in spaces.
Address	This is generated from the entries you make in the expanded fields.
Address	First line of candidate's address.
Town	Name of town
County	Name of county
Country	Name of country.
Postcode	Postcode. This must be entered.
Telephone	The company's phone number.
Fax	The company's fax number.
Web site	The company's web site address.
State	Select an item from the drop down list. You must enter this information. Initially this should be Prospect. Once an Account Number has been issued you can change it to Client.
Source	Select an item from the drop down list.

- When you have entered all the information, click on the Next button. The Contact creation screen is displayed.

- Click on the + button to expand a section and enter the required details for your primary contact at this company.

The information that you are asked for depends on what has been requested by your company, but should include some or all of the following:

Contact	This is generated from the names that you enter in the Surname and Forenames fields.
Surname	The contact's surname.
Forenames	The candidate's forenames.
Name	This is generated from the names that you enter.
Salutation	This is generated from the names that you enter. It is used for letters and e-mails, i.e. Dear <Salutation>, not the candidate's title.
Keyname	This is generated from the names that you enter. You can edit this to reflect the way that the company works, e.g. put in spaces.
Primary Contact	Tick this box if this person is your main contact at the company.
Direct Line	The contact's direct dial phone number.
Mobile	The contact's mobile phone number.
E-mail	The contact's e-mail address.
Fax	The contact's fax number.
Employed	Not applicable – for contacts placed by agency
Start Date	Not applicable – for contacts placed by agency
Leave Date	Not applicable, Note: When you enter a leave date the contact becomes historic from that date.
Temp	Not applicable – for contacts placed by agency
Position	The contact's position in the company, e.g. Personnel Manager.
Department	The department that the contact works in, e.g. Personnel.

- When you have entered all the information, click on the Finish button. This then displays the details form for that Company.

At the top of this screen there are some buttons that you use as follows:

Keystroke	**Use**
Reports	Run any of the company selector reports but only for the current contact.
Delete	Delete a record if there are no links such as Contact Events or Progress. To effectively remove a record but retain them for history,you should change their state to Deleted.
Help	Open the help page with guidance on the fields on this screen.

You can view different information by clicking on an option on the left side of the screen.

See also
Adding further company details

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