



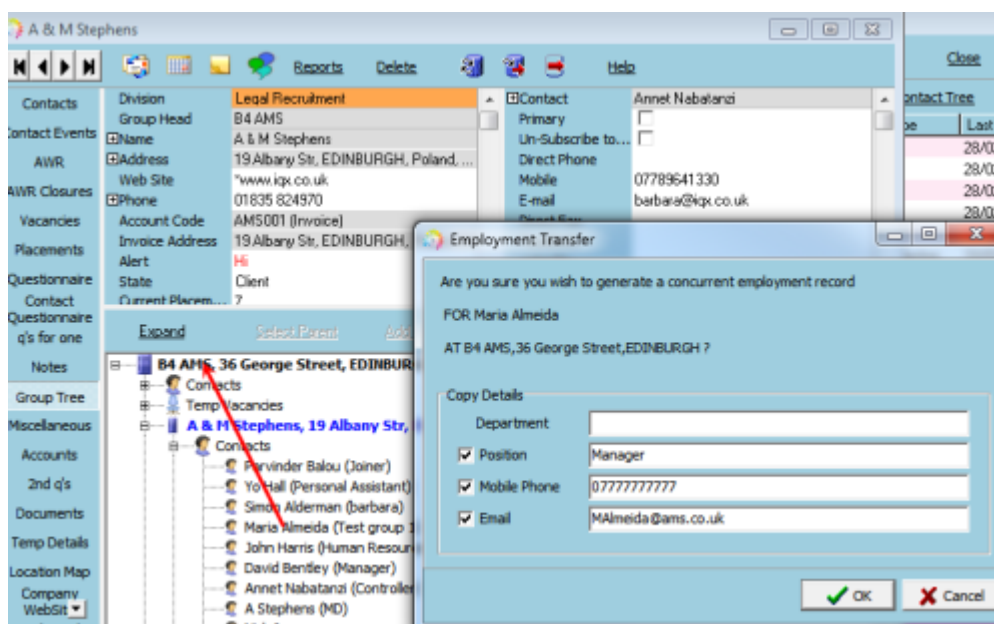
Contact Tree

The Contact Tree allows for one Contact to be linked to **multiple** Company records, without being duplicated. It links through the Company Group.

Set up - Company Group Tree view needs to be switched on (general settings, switchable views 590). See also [Company Groups](#).

Once you have added the relevant Company into the Group structure, you can add contacts from one company within the group to another, creating a concurrent employment for that person. Click on the Contact and drag and drop them to the other other company line.

The cursor will change on the company, and when dropped will open a dialogue to confirm you wish to create the employment at that company and edit their details if they are different from this employment.



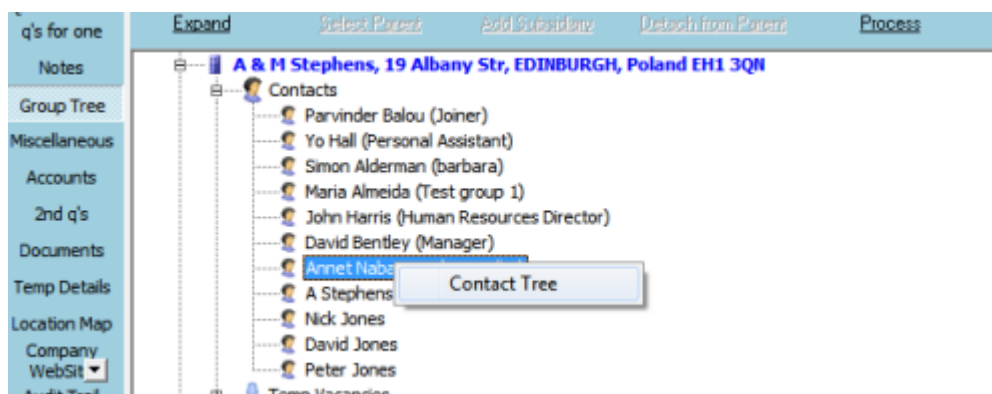
Contact Trees can be opened by using the Contact Tree button on the Contact Selector form (with the relevant person selected), or the button on the Contacts view within an open company record, or by right clicking on the contact within the Group Tree view.





The screenshot shows the 'A & M Stephens' software window. The 'Contact Tree' tab is selected, displaying a list of contacts with columns for Name, Status, Primary, Job Title, Note, Department, and Start Date. The contact 'Annet Nabatanzi' is highlighted in pink, indicating they are the Primary Contact.

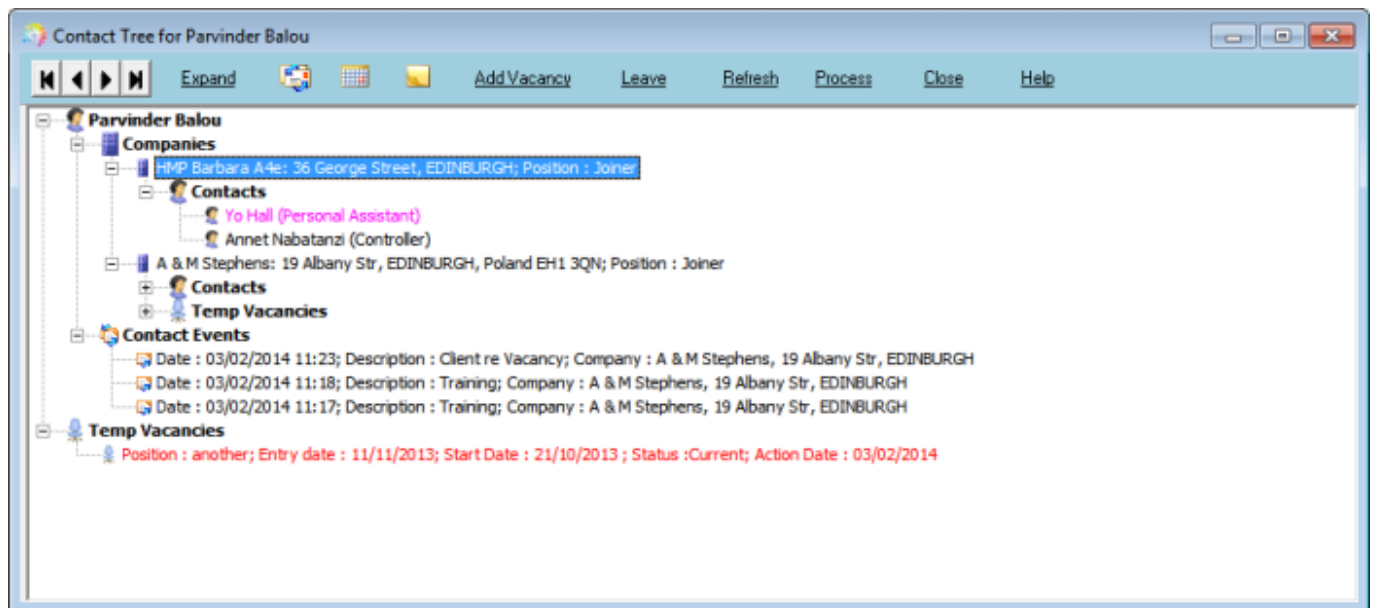
Name	Status	Primary	Job Title	Note	Department	Start Date
David Jones	Client	<input checked="" type="checkbox"/>				
Yo Hall	Client	<input checked="" type="checkbox"/>	Personal Assistant			17/03/2014
A Stephens	Client	<input type="checkbox"/>	MD			
Simon Alderman	Current	<input type="checkbox"/>	barbara			10/03/2014
Maria Almeida	Current	<input type="checkbox"/>	Test group 1			10/03/2014
Parvinder Balou	Current	<input type="checkbox"/>	Joiner			29/07/2013
David Bentley	Archived/...	<input type="checkbox"/>	Manager			27/10/2008
John Harris	Client	<input type="checkbox"/>	Human Resource...		HR Depart...	26/06/2013
Nick Jones	Client	<input type="checkbox"/>				
Peter Jones	Client	<input type="checkbox"/>				18/09/2012
Annet Nabatanzi	Current	<input checked="" type="checkbox"/>	Controller			10/11/2008



The Contact Tree shows all Companies that the Contact is employed at within the group, recent Contact Events and Vacancies connected to that contact across those companies.

Items with work due against them show in red.

Contacts showing in pink are ticked as Primary Contact on the Company.



Records can be expanded by double clicking or using the Expand button.

From the contact tree, you can make a contact event, appointment/reminder, add vacancies and update the leave date against that contact. You need to select the Company that this is linked to and the relevant buttons will then become active.

Using the PROCESS button takes the records into the relevant selector view – companies, contacts, candidates, vacancies, or contact events.

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