2024/05/16 10:27

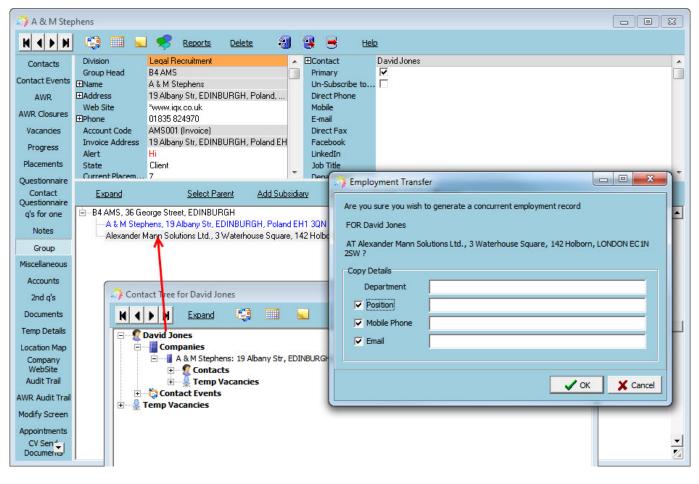


## **Contact Tree**

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

From Company Group:

Open the Contact Tree for the relevant contact. Go to the Group view and drag and drop the contact name onto the company you wish to add the employment to.



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.

If Group Tree is 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



2/4

## 2024/05/16 10:27

Group Tree

## employment.

| 🐊 A & M Step   | phens                          |  |        |              |            |               |         |   | 3                |  |
|----------------|--------------------------------|--|--------|--------------|------------|---------------|---------|---|------------------|--|
| HAFH           | 🙂 🖬 🖬                          | 🦻 Reports 🛛 🛛                                    | elete  | - 83         | 2          | •             | ttek    | 2                                       | Close            |  |
| Contacts       | Division<br>Group Head         | Legal Recruitment<br>B4 AMS                      |        |              | ECor       | ntact<br>narv |         | Annet Nabatanzi                         | ontact Tree      |  |
| Contact Events | EName                          | A & M Stephens                                   |        |              |            | Subscribe     | e to    | ă l                                     | 28/02/           |  |
| AWR            | Address                        | 19 Albany Str, EDINBUR                           | GH, Po | and,         |            | ect Phone     |         |   | 28/02/           |  |
| AWR Closures   | Web Site<br>EPhone             | "www.iqx.co.uk<br>01835 824970                   |        |              | Mol<br>E-n |               |         | 07789641330<br>barbara@iqx.co.uk        | 28/02/<br>28/02/ |  |
| Vacancies      | Account Code                   | AMS001 (Invoice)                                 | 0      |              | Die        | ant Enn       | -       |   |                  |  |
| Placements     | Invoice Address<br>Alert       | 19 Albany Str, EDINBUR                           | GH,    | Emplo        | ryment     | Transfer      |         |   |                  |  |
| Questionnaire  | State                          | Client   |        | Are you      | sure yo    | u wish to     | gener   | rate a concurrent employment record     |                  |  |
| Contact        | Current Placem                 | 7  | _      | FOR Ma       |            |               |         |   |                  |  |
| Questionnaire  | Expand                         |  | Add    | POR Ma       | ria Alme   | 908           |         |   |                  |  |
| q's for one    |                                |  |        | AT B4 A      | MS,36 (    | George St     | treet,E | EDINBURGH ?                             |                  |  |
| Notes          | 8 84 AME 3                     | BUR  |        |              |            |               |         |   |                  |  |
| Group Tree     | B Contects<br>B Temp (acancies |  |        | Copy Details |            |               |         |   |                  |  |
| Miscellaneous  |                                | Etephens, 19 Albany                              | Str,   | De           | partner    | nt            |         |   |                  |  |
| Accounts       |                                | on octs<br>🖉 Pervinder Balou (Joiner             |        | Pr Pr        | osition    | F             | Manag   | per                                     |                  |  |
| 2nd q's        |                                | 💈 Yo Hall (Personal Assist                       | tant)  | M M          | obile Ph   | one i         | 07777   | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, |                  |  |
| Documents      |                                | Simon Alderman (barba<br>Maria Almeida (Test gro |        | ₩ Đ          | nail       | Ī             | MAlme   | ida@ams.co.uk                           |                  |  |
| Temp Details   |                                | 💈 John Harris (Human Re                          |        |              |            |               |         |   |                  |  |
| Location Map   |                                | David Bentley (Manage                            |        |              |            |               |         |   |                  |  |
| Company        |                                | Annet Nabatanzi (Cont                            | role   |              |            |               |         | 🖌 OK                                    | X Cancel         |  |
| WebSit •       |                                | A Stephens (MD)                                  |        |              |            |               |         |   |                  |  |

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.

| ne or #A/C Code |  | Find        |           | Companies | Con         | tacts     | New         |             | <u>Close</u> | <u>Help</u>   |
|-----------------|--|-------------|-----------|-----------|-------------|-----------|-------------|-------------|--------------|---------------|
| ction Clie      | nts and Prospe   | cts         | -         | Expand    |             | Count     |             | Contact     | Tree         | Update        |
| rch             | Contact  | Job Title   |           | Compar    | W           | State     | .           | Туре        | Last PI S    | Start Date    |
| elections Victo | oria Salisbury   | Solicitor   | 31 G      | roup PLC  |             | Prospect  | 1           |             | 28/02/1      | 4             |
|                 | ss Ansold  | Dranah Man  | ~ 210     | IN DI C   |             | Desense   |             |             | 20 102 11    | 4             |
| ) A & M Stephen | 5  |             |           |           |             |           |             |             |              |               |
|                 | 9 🗆 🖬  | 🥩 Re        | ports     | Delete    | <b>8</b> 1  |           | Help        |             |              |               |
| Contacts D      | vision   | Legal Recru | tment     |           | A           | ■Contact  | A           | innet Nabat | anzi         |               |
|                 | roup Head  | HMP Barbar  |           |           |             | Primary   |             |             |              |               |
| ontact Events   |  | A & M Steph |           |           |             |           | cribe to    |             |              |               |
| And Lin         | EAddress 19 Albary Str, EDINBURGH, Poland, Direct Phone                  |             |           |           |             |           |             |             |              |               |
| UND Clock ser   | Web Site "www.igx.co.uk Mobile 07789641330                               |             |           |           |             |           |             |             |              |               |
| EP              | EPhone 01835 824970 E-mail barbara@iqx.co.uk                             |             |           |           |             |           |             |             |              |               |
|                 | Account Code AMS001 (Invoice) Direct Fax                                 |             |           |           |             |           |             |             |              |               |
| Placements      | Invoice Address 19 Albany Str, EDINBURGH, Poland EH Facebook<br>Alert Hi |             |           |           |             |           |             |             |              |               |
|                 | ert<br>tate  | Client      |           |           |             | Job Title |             | Controller  |              |               |
|                 | urrent Placem  | Z Z         |           |           | -           | Departm   |             | .onuolier   |              |               |
| Duestionnaire   |  |             |           |           |             |           |             |             |              |               |
| g's for one     | Select /   |             | tact Tree |           | Lea         | we        | Include For | mer Indu    |              | nclude Placed |
| Notes           | Name   | St          | atus      | Primary   | Job T       | itle      | No          | le          | Department   | Start Date    |
| D               | avid Jones   | Clien/      |           | <b>V</b>  |             |           |             |             |              |               |
| Group Tree Y    | oHall  | Clien/      |           | <b>v</b>  | Personal A: | ssistant  |             |             |              | 17/03/2014    |
| Miscellaneous   | Stephens   | Clien/      |           |           | MD          |           |             |             |              |               |
| Accounts        | imon Alderman  | Curre       | nt        |           | barbara     |           |             |             |              | 10/03/2014    |
| Accounts        | laria Almeida  | Curre       | nt        |           | Test group  | 1         |             |             |              | 10/03/2014    |
| 2nd q's P       | arvinder Balou   | Curre       | nt        |           | Joiner      |           |             |             |              | 29/07/2013    |
| Documents D     | avid Bentley   | Archi       | /ed/      |           | Manager     |           |             |             |              | 27/10/2008    |
| J               | ohn Harris   | Clien/      |           |           | Human Re    | source    |             |             | HR Depart    | . 26/06/2013  |
| Temp Details    | lick Jones   | Clien/      |           |           |             |           |             |             |              |               |
| Location Map    | eter Jones   | Clien/      |           |           |             |           |             |             |              | 18/09/2012    |
| Company         | nnet Nabatanzi   | Curre       |           |           | Controller  |           |             |             |              | 10/11/2008    |



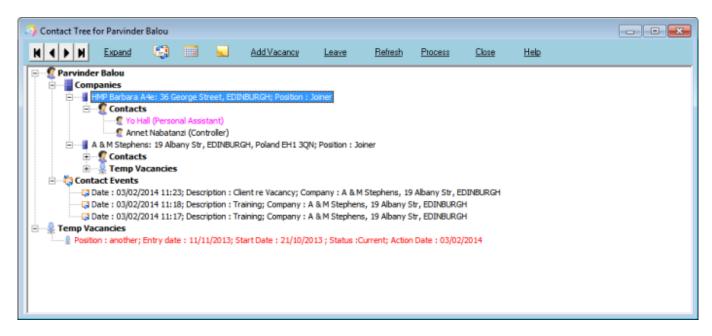
## 2024/05/16 10.27

| 2024/05/16 10:27 |  |                                  |                   | 3/4                | Group Tree |  |  |  |  |  |  |
|------------------|--|----------------------------------|-------------------|--------------------|------------|--|--|--|--|--|--|
| q's for one      | Expand   | Select Parent                    | Add Subsidenz     | Detach iron Parent | Process    |  |  |  |  |  |  |
| Notes            |  | I Stephens, 19 Alba              | ny Str, EDINBURGH | I, Poland EH1 3QN  |            |  |  |  |  |  |  |
| Group Tree       |  | ontacts<br>🙎 Parvinder Balou (Jo | piner)            |                    |            |  |  |  |  |  |  |
| Miscellaneous    | Yo Hall (Personal Assistant)   |                                  |                   |                    |            |  |  |  |  |  |  |
| Accounts         | Simon Alderman (barbara)   |                                  |                   |                    |            |  |  |  |  |  |  |
| 2nd q's          | 9 Maria Almeida (Test group 1)<br>9 John Harris (Human Resources Director) |                                  |                   |                    |            |  |  |  |  |  |  |
| Documents        |  | a David Derracy (ridi            | hager)            |                    |            |  |  |  |  |  |  |
| Temp Details     |  | Annet Naba A Stephens            | Contact Tree      |                    |            |  |  |  |  |  |  |
| Location Map     |  | 🙎 Nick Jones                     |                   |                    |            |  |  |  |  |  |  |
| Company          |  | 2 David Jones                    |                   |                    |            |  |  |  |  |  |  |
| WebSit           |  | 2 Peter Jones                    |                   |                    |            |  |  |  |  |  |  |

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.

Back to Companies. How to...

2024/05/16 10:27

4/4

Group Tree

From: https://iqxusers.co.uk/iqxhelp/ - **iqx** 

Permanent link: https://iqxusers.co.uk/iqxhelp/doku.php?id=ug2-12a&rev=1395756397

Last update: 2017/11/16 21:59