

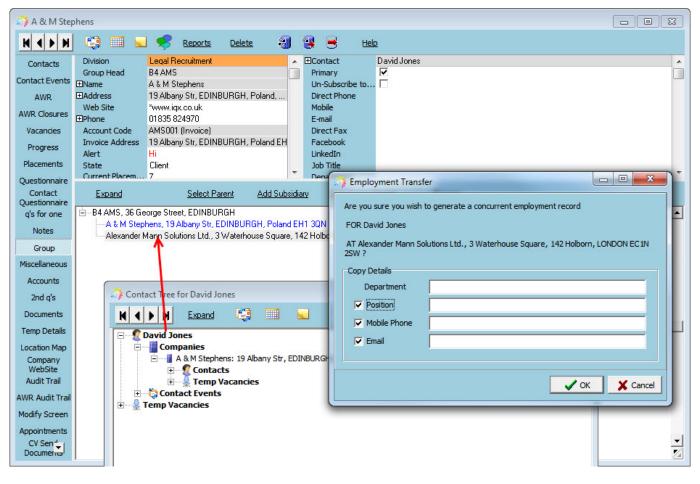
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## **Contact Tree**

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



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Group Tree

## employment.

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AWR	Address	19 Albany Str. EDINBU	IRGH, Po	land,	Direct Phe	one			28/02/
AWR Closures	Web Site ⊡Phone	"www.iqx.co.uk 01835 824970			Mobile E-mail		07789641330 barbara@iqs.co.uk		28/02/
Vacancies	Account Code	AMS001 (Invoice)	0	-	Disast Eng			_	28/02/
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Questionnaire	Expand		Add	FOR Mari	a Almeida				
q's for one	Experie		22454	AT B4 AM	tS, 36 George	Street,	EDINBURGH 7		
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Documents		Simon Alderman (bar Maria Almeida (Test )		🔽 Em	ail	MAlme	sida@ams.co.uk		
Temp Details		💈 John Harris (Human F	Resource						
Location Map		David Bentley (Mana							
Company		Annet Nabatanzi (Co	ntroller					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.

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arch	Contact	Job Title	Company	y Sta	te Ts	pe Last P	9 Start Date		
elections Vic	toria Salisbury	Solicitor 3	I Group PLC	Prospe	ct	28/02	/14		
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Contacts	Division	Legal Recruitment		▲ EContac	t Anne	t Nabatanzi			
	Group Head	HMP Barbara A4e		Primary					
	EName A & M Stephens Un-Subscribe to								
Ann	Address 19 Albany Str, EDINBURGH, Poland, Direct Phone Web Site "www.iox.co.uk Mobile 07789641330								
AWR Closures EPhone 01835 824970 E-mail					0.10	barbara@igx.co.uk			
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-	State	Client		Job Tit	le Contr	oller			
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Questionnaire o's for one	Select /	Add Contact 1	Tree Person	Leave	Include Former	Include Temps	Include Placed		
1	Name	Status	Primary	Job Title	Note	Departme	ent Start Date		
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Group Tree	YoHall	Client	P P	ersonal Assistant			17/03/2014		
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	John Harris	Client	— н	luman Resource		HR Depa	rt 26/06/2013		
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Company .	Annet Nabatanzi	Current	E 0	Controller			10/11/2008		



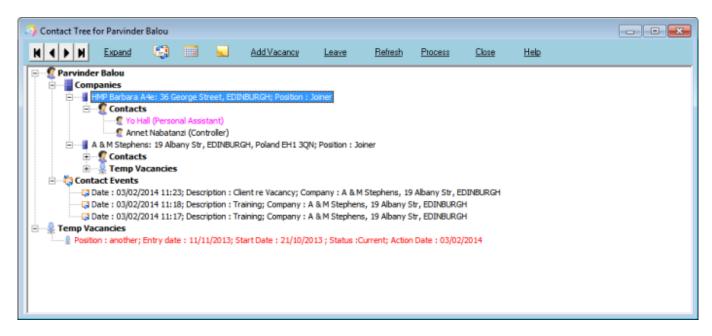
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Miscellaneous	Yo Hall (Personal Assistant)								
Accounts	Simon Alderman (barbara)								
2nd q's	Maria Almeida (Test group 1) 								
Documents		a David Derracy (ridi	hager)						
Temp Details		Annet Naba A Stephens	Contact Tree						
Location Map		🙎 Nick Jones							
Company		2 David Jones							
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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...

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Group Tree

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