intelligence Cheat Sheet: Adding & Editing A Client

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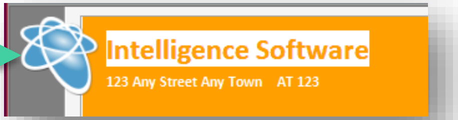
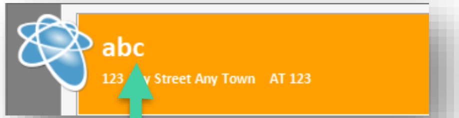
ADD A CLIENT

1. Check if the client's record exists:

a. click into the name field

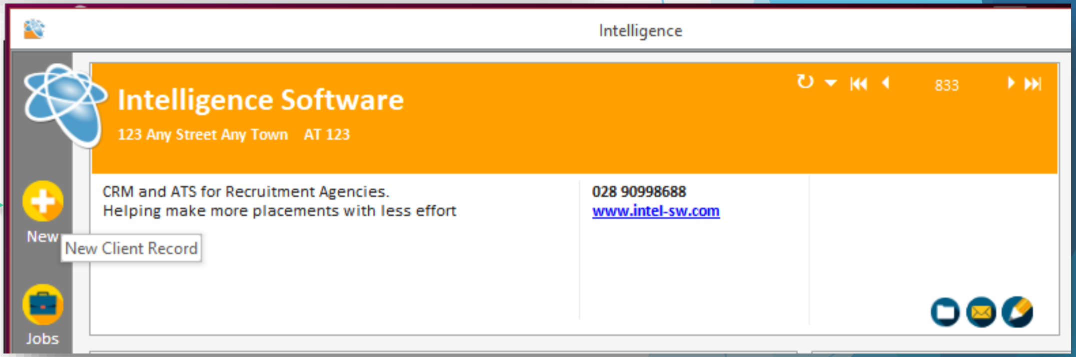


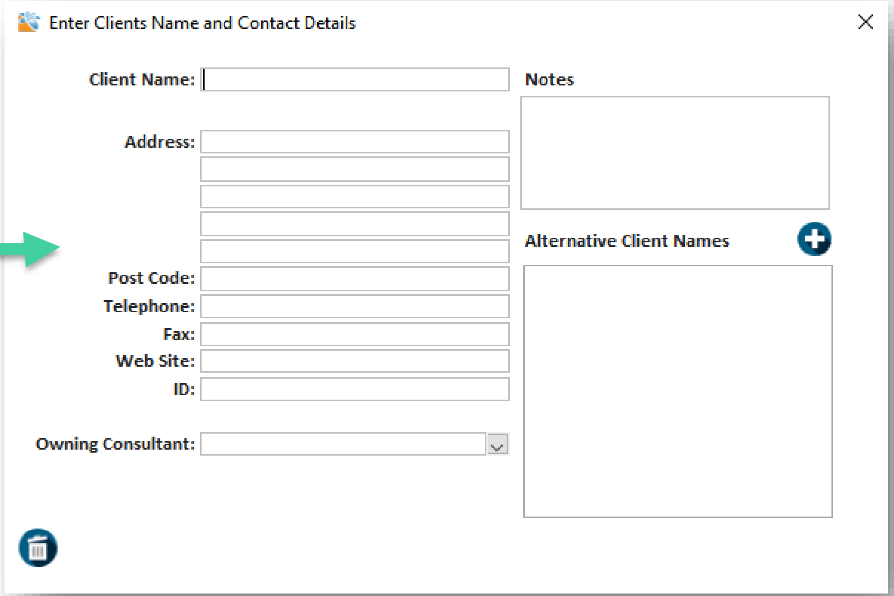
b. type in what you are looking for
(company name or person's name who works there)



c. select the required record from the results

2. If the client's record doesn't exist, then click on the "New" button on the, and type in or copy/paste the required information





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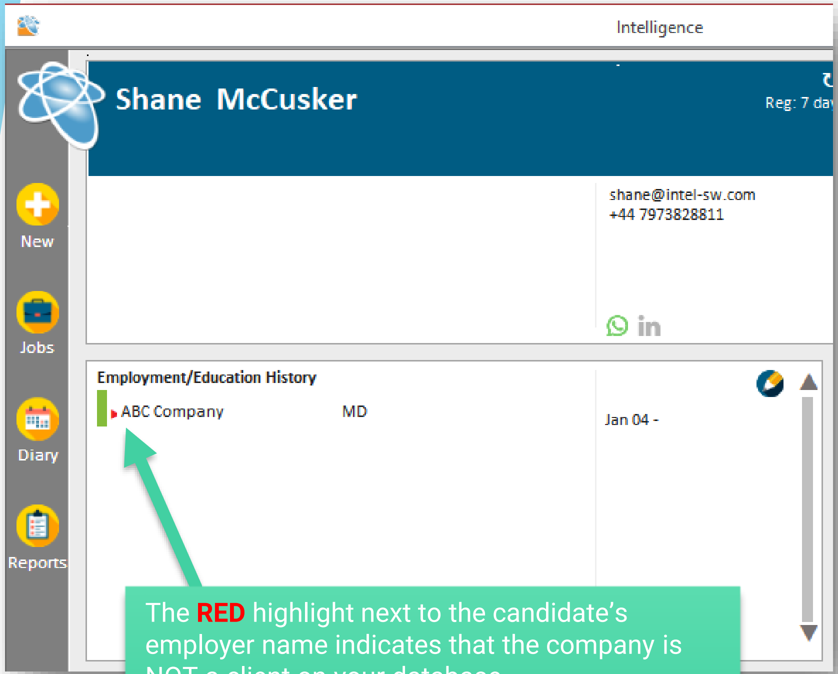
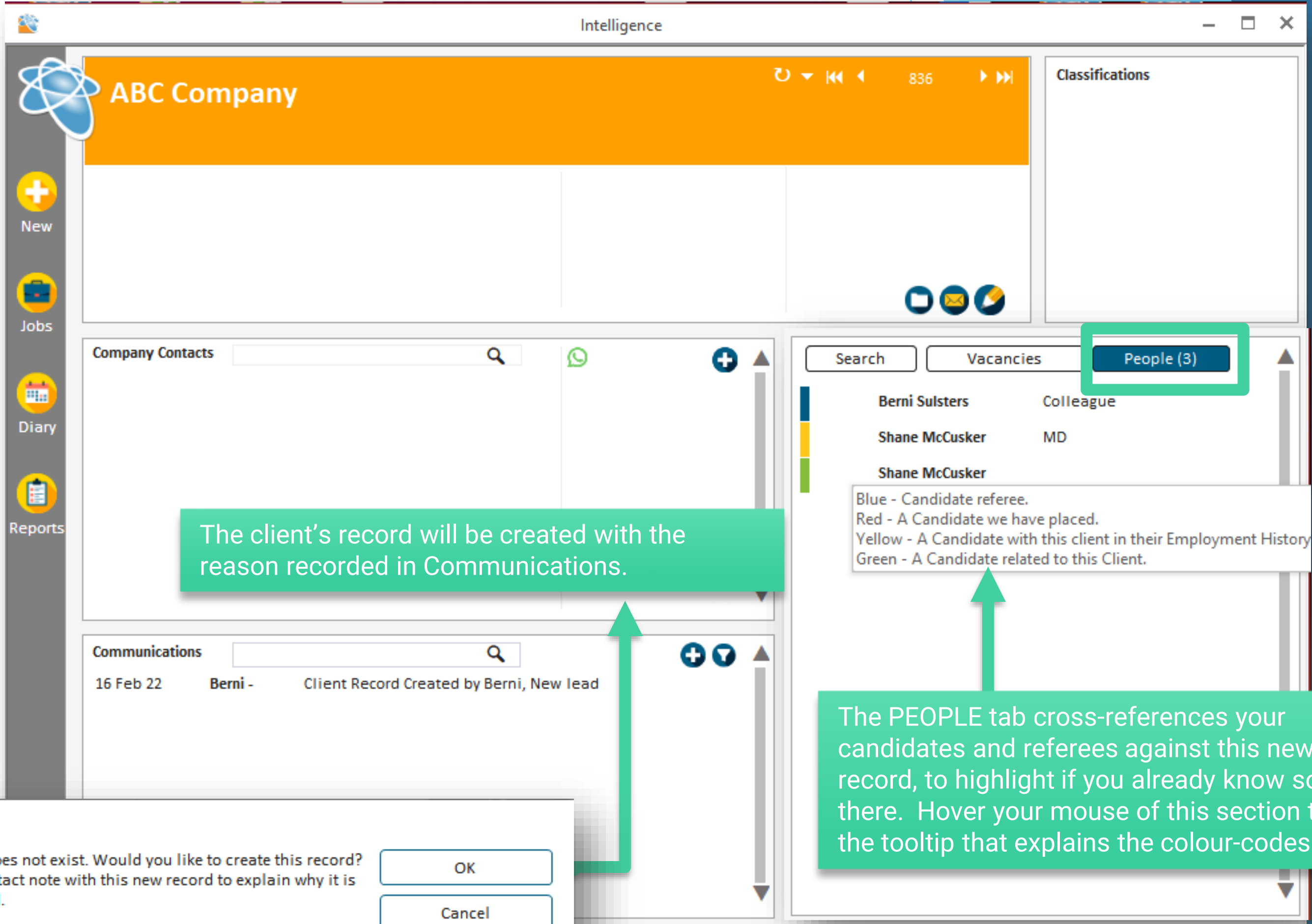
ADD A CLIENT FROM A CANDIDATE'S EMPLOYMENT HISTORY

TIP: Did you know that you add a client directly from a candidate's employment history? This information can also be used to search for LEADS.

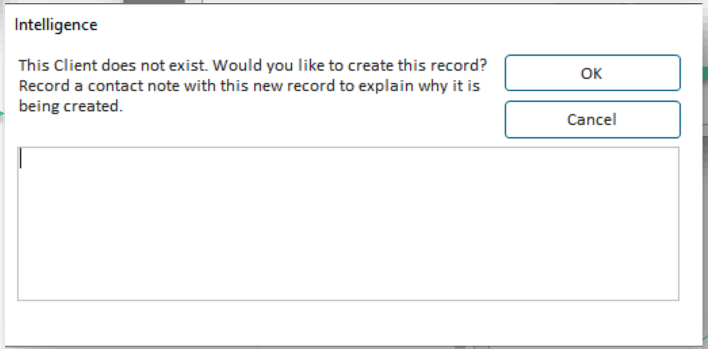


The **RED** highlight next to the candidate's employer name indicates that the company is NOT a client on your database.

Double-click the company name to add it to your database as a client record. You can also add a contact note to record why it is being created, if you want to.



The client's record will be created with the reason recorded in Communications.



The PEOPLE tab cross-references your candidates and referees against this new client record, to highlight if you already know someone there. Hover your mouse of this section to see the tooltip that explains the colour-codes.

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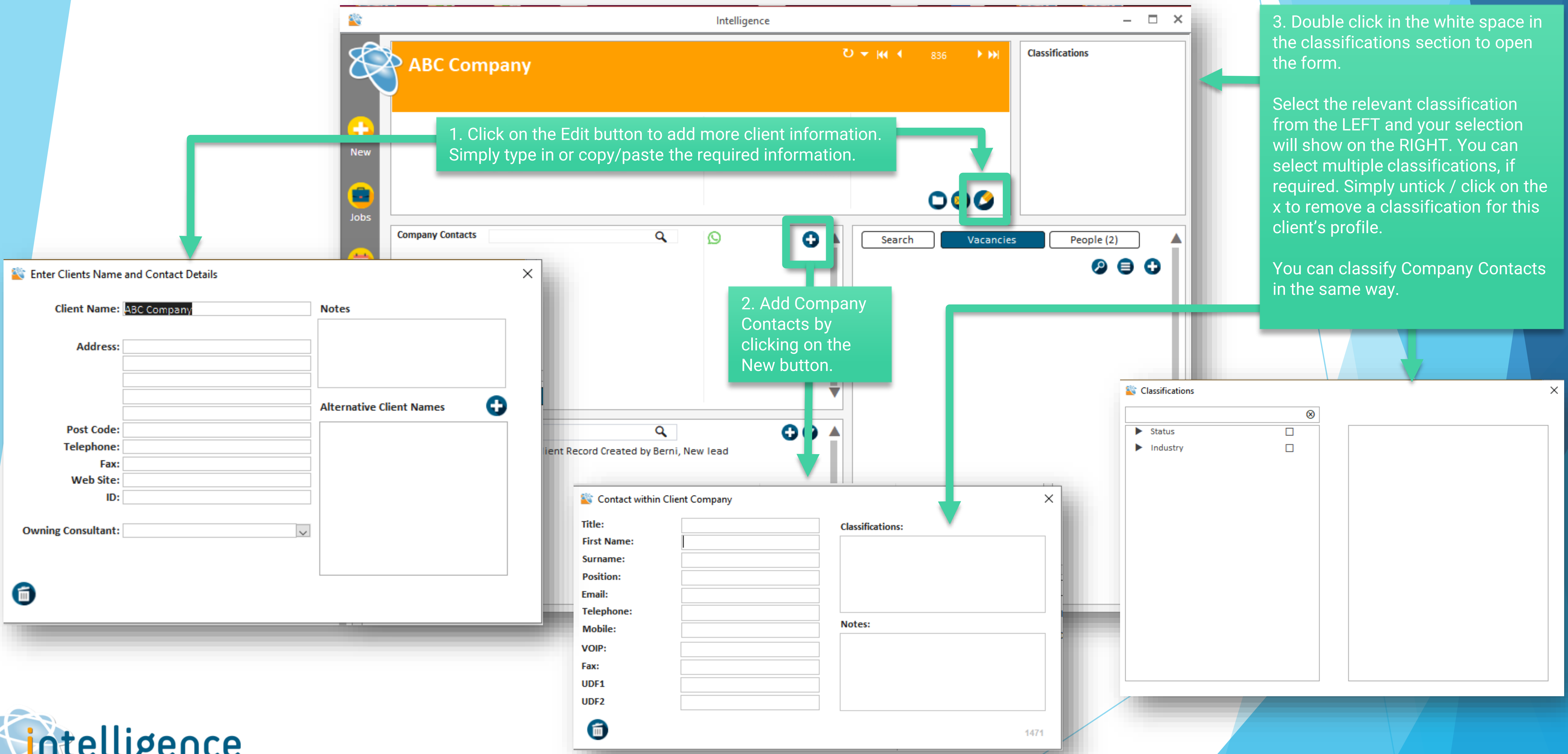
EDIT A CLIENT



1. Click on the Edit button to add more client information. Simply type in or copy/paste the required information.

2. Add Company Contacts by clicking on the New button.

3. Double click in the white space in the classifications section to open the form.

Select the relevant classification from the LEFT and your selection will show on the RIGHT. You can select multiple classifications, if required. Simply untick / click on the x to remove a classification for this client's profile.

You can classify Company Contacts in the same way.

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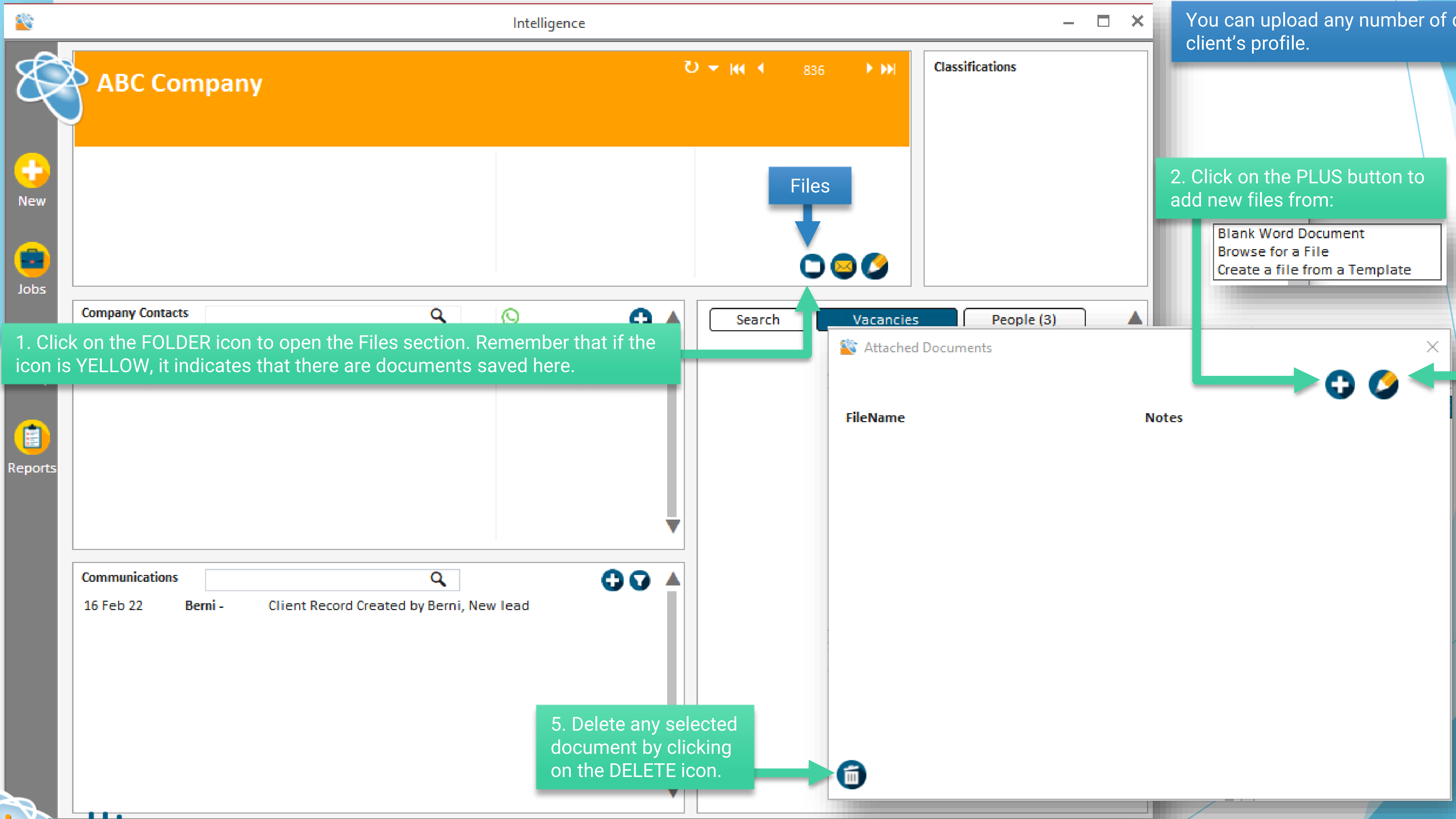
UPLOAD FILES

You can upload any number of documents to a client's profile.



1. Click on the FOLDER icon to open the Files section. Remember that if the icon is YELLOW, it indicates that there are documents saved here.

2. Click on the PLUS button to add new files from:

- Blank Word Document
- Browse for a File
- Create a file from a Template

TIP:
You can select multiple files to upload at one time.

3. Click on the EDIT button:

- Open File
- Save file to Disk
- Edit Note
- Rename File

5. Delete any selected document by clicking on the DELETE icon.

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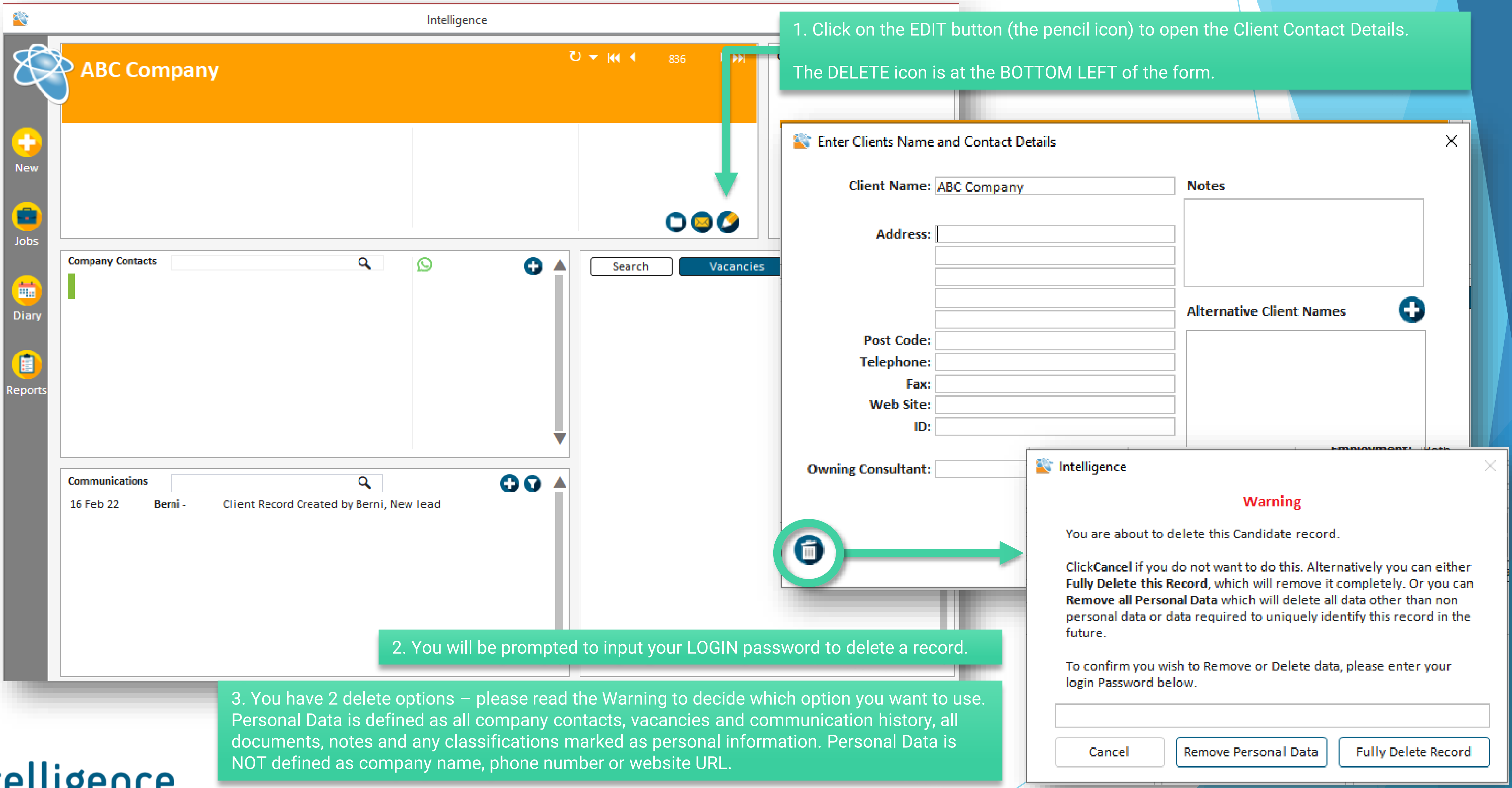
DELETE A CLIENT



1. Click on the EDIT button (the pencil icon) to open the Client Contact Details.

The DELETE icon is at the BOTTOM LEFT of the form.

2. You will be prompted to input your LOGIN password to delete a record.

3. You have 2 delete options – please read the Warning to decide which option you want to use. Personal Data is defined as all company contacts, vacancies and communication history, all documents, notes and any classifications marked as personal information. Personal Data is NOT defined as company name, phone number or website URL.

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