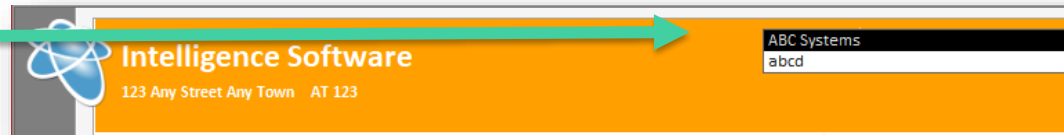
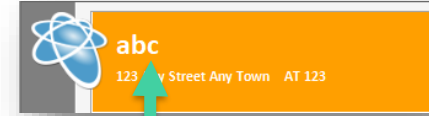


- | | |
|-------------------------------------------------------|--------|
| 1. Add a Client | page 1 |
| 2. Add a Client from a Candidate's Employment History | page 2 |
| 3. Edit a Client | page 3 |
| 4. Upload Files | page 4 |
| 5. Delete a Client | page 5 |

ADD A CLIENT

1. Check if the client's record exists:

- click into the name field
- type in what you are looking for (company name or person's name who works there)
- 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

Enter Clients Name and Contact Details

Client Name:

Address:

Post Code:

Telephone:

Fax:

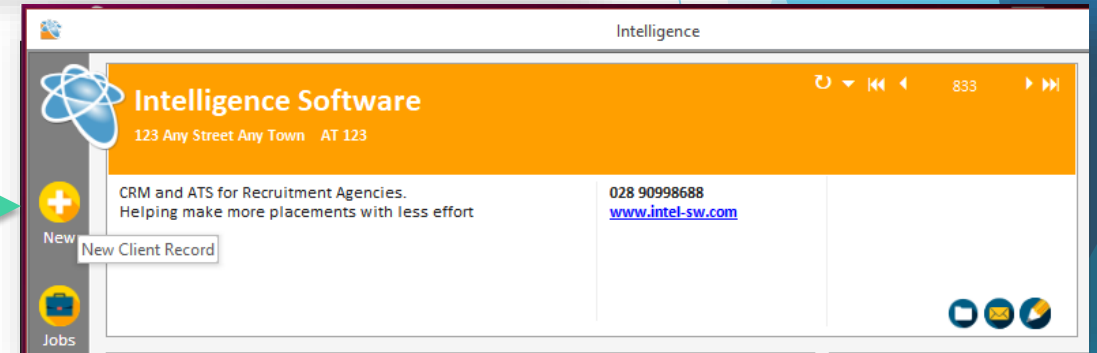
Web Site:

ID:

Owning Consultant:

Notes

Alternative Client Names



intelligence Cheat Sheet: Adding & Editing A Client

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.

Intelligence

Shane McCusker

Reg: 7 days

shane@intel-sw.com
+44 7973828811

in

Employment/Education History

ABC Company	MD	Jan 04 -
-------------	----	----------

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.

Intelligence

ABC Company

836

Classifications

Company Contacts

Search

Vacancies

People (3)

Berni Sulsters	Colleague
Shane McCusker	MD
Shane McCusker	

Blue - Candidate referee.
Red - A Candidate we have placed.
Yellow - A Candidate with this client in their Employment History
Green - A Candidate related to this Client.

Communications

16 Feb 22 Berni - Client Record Created by Berni, New Lead

Intelligence

This Client does not exist. Would you like to create this record?
Record a contact note with this new record to explain why it is being created.

OK

Cancel

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.

intelligence Cheat Sheet: Adding & Editing A Client

EDIT A CLIENT

The screenshot displays the 'Intelligence' software interface with a client profile for 'ABC Company'. The interface includes a top navigation bar, a sidebar with 'New' and 'Jobs' buttons, and a main content area with 'Company Contacts', 'Vacancies', and 'People (2)' tabs. Three callout boxes provide instructions: 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. A separate 'Classifications' window shows a list of classification categories like Status and Industry with checkboxes.

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.

Enter Clients Name and Contact Details

Client Name: Notes

Address:

Post Code:
Telephone:
Fax:
Web Site:
ID:

Owning Consultant:

Alternative Client Names

Contact within Client Company

Title:
First Name:
Surname:
Position:
Email:
Telephone:
Mobile:
VOIP:
Fax:
UDF1:
UDF2:

Classifications:
Notes:

Classifications

Status
Industry

Intelligence Cheat Sheet: Adding & Editing A Client

UPLOAD FILES

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

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.

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

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

Intelligence Cheat Sheet: Adding & Editing A Client

DELETE A CLIENT

The screenshot displays the 'Intelligence' software interface. At the top, there's a header for 'ABC Company' with a navigation bar containing icons for 'New', 'Jobs', 'Diary', and 'Reports'. The main area shows a 'Company Contacts' section with a search bar and a 'Vacancies' button. A 'Communications' section below it shows a record from '16 Feb 22' by 'Berni'. A modal window titled 'Enter Clients Name and Contact Details' is open, showing fields for Client Name, Address, Post Code, Telephone, Fax, Web Site, ID, and Owing Consultant. A pencil icon in the bottom left of this form is highlighted with a green circle and an arrow pointing to a 'Warning' dialog box. The dialog box contains the following text: 'Warning', 'You are about to delete this Candidate record.', 'ClickCancel if you do not want to do this. Alternatively you can either Fully Delete this Record, which will remove it completely. Or you can Remove all Personal Data which will delete all data other than non personal data or data required to uniquely identify this record in the future.', and 'To confirm you wish to Remove or Delete data, please enter your login Password below.' Below the text is a password input field and three buttons: 'Cancel', 'Remove Personal Data', and 'Fully Delete Record'.

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.