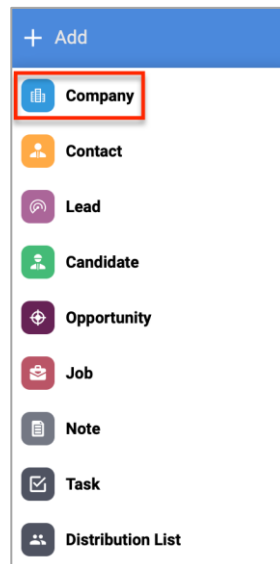


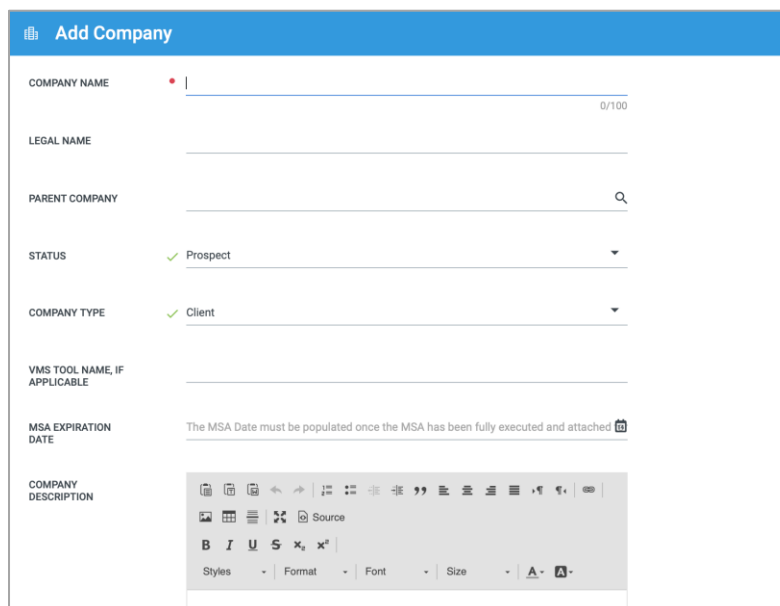
Creating a Company

Based on configuration, fields and labels seen in screen shots may vary from the client's configuration. This document covers the basic options to create a Company

- Click **+ Add** Fast Add to create a new Company



- The *Add Company* page opens. Populate all required fields, adding as much information as possible. Once all details are populated, click **Save**

A screenshot of the 'Add Company' form in a software application. The form has a blue header bar with the title 'Add Company'. Below the header, there are several input fields and dropdown menus. The 'COMPANY NAME' field is at the top, followed by 'LEGAL NAME', 'PARENT COMPANY' (with a search icon), 'STATUS' (with a green checkmark and 'Prospect' selected), 'COMPANY TYPE' (with a green checkmark and 'Client' selected), 'VMS TOOL NAME, IF APPLICABLE', and 'MSA EXPIRATION DATE' (with a note: 'The MSA Date must be populated once the MSA has been fully executed and attached'). At the bottom, there is a 'COMPANY DESCRIPTION' field with a rich text editor toolbar. The toolbar includes icons for bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, and text color. Below the toolbar, there are labels for 'Styles', 'Format', 'Font', 'Size', and 'Color'.

- The created Company *Overview* screen displays. The Company ID and Company name appear in the banner across the top

The tabs across the top of the Company contain information about the record. Tabs include:

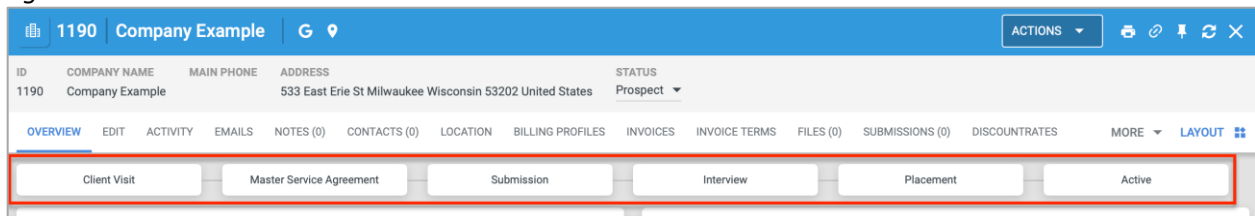
- Overview:** View of the Company Cards, containing general details
- Edit:** Update Company details or to view all fields
- Activity:** Summary of related records and actions taken for this Company
- Emails:** List of emails associated with the Company
- Notes:** List/content of Notes associated with the Company
- Contacts:** List of Contacts associated with the Company. New Contacts may be created from this tab
- Files:** List of files associated with the Company. Company files are uploaded under this tab.
- Submissions:** Candidates who have been submitted to the Company's Jobs and what stages of the submission process they advanced to, including Placements
- Location:** Company address records, including work sites and billing addresses
- Billing Profiles:** Details on who receives invoices and how those invoices are received
- Invoices:** List of invoices generated for the Company
- Invoice Terms:** Details on invoice formats and content
- Discount Rates:** Shows what discount rates associated with the Company
- Pulse.** Statistics and insight of Pulse functionality

There may be additional tabs associated to Marketplace partners or due to customizations specific to your system. Tabs may appear in a different order than pictured in the example

The Workflow items track activity associated with the Company. This includes:

- **Client Visits:** Total number of client visits
- **Submissions:** Total number of submissions for this Company's Jobs
- **Interviews:** Total number of interviews that have been scheduled for this Company's Jobs
- **Placements:** Total number of placements made for this Company
- **Active:** Number of active placements

Workflow items may vary; this example shows a client specific configured item Master Service Agreement



<Agency> Company Management

Cover custom tabs or customizations