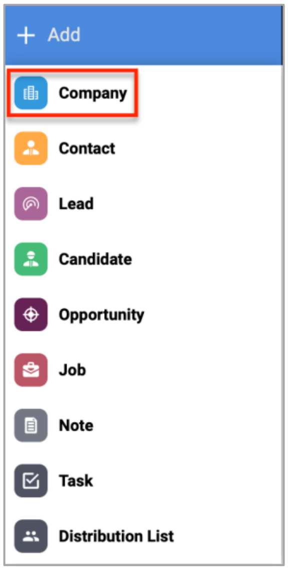
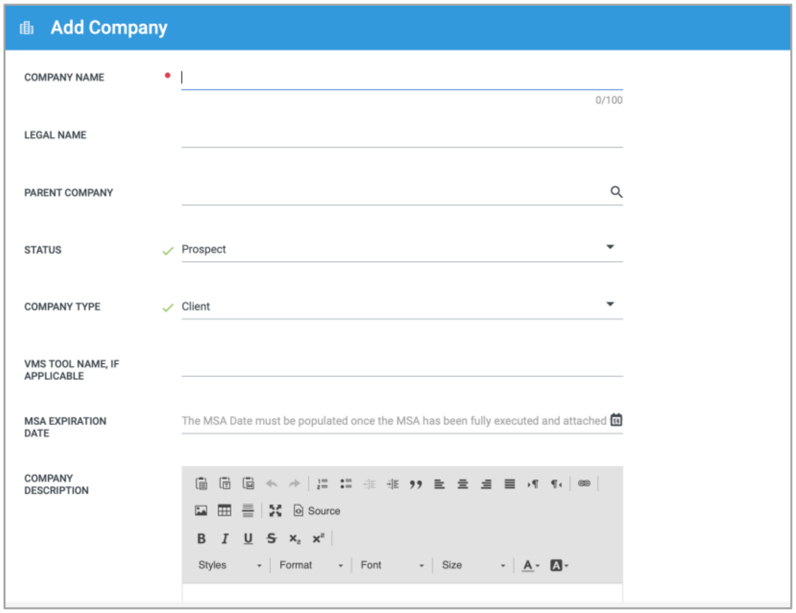
Creating a Company

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

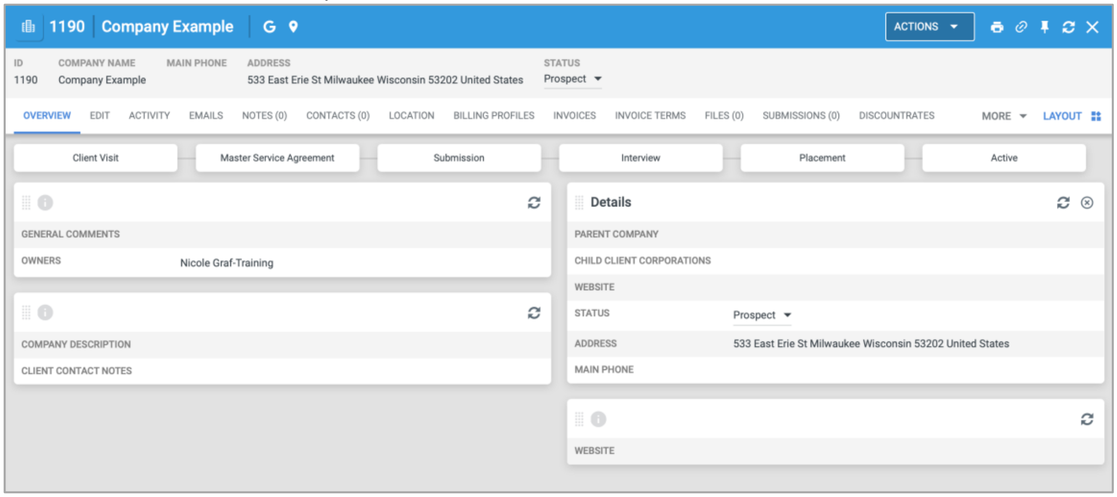


- The *Add Company* page opens. Populate all required fields, adding as much information as possible. Once all details are populated, click **Save**



Company

- 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:

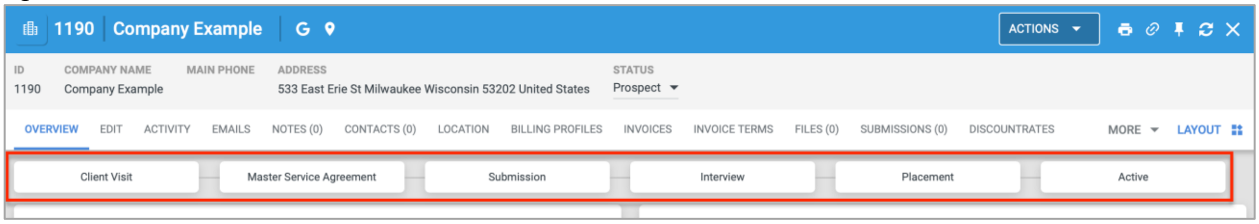
- **Overview**: View of the Company Cards, containing general details
- **Edit**: Update Company details or to view all fields
- **Activity**: Summary of related records and actions taken for this Company
- **Emails**: List of emails associated with the Company
- **Notes**: List/content of Notes associated 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