What do I do when a client leaves a company?

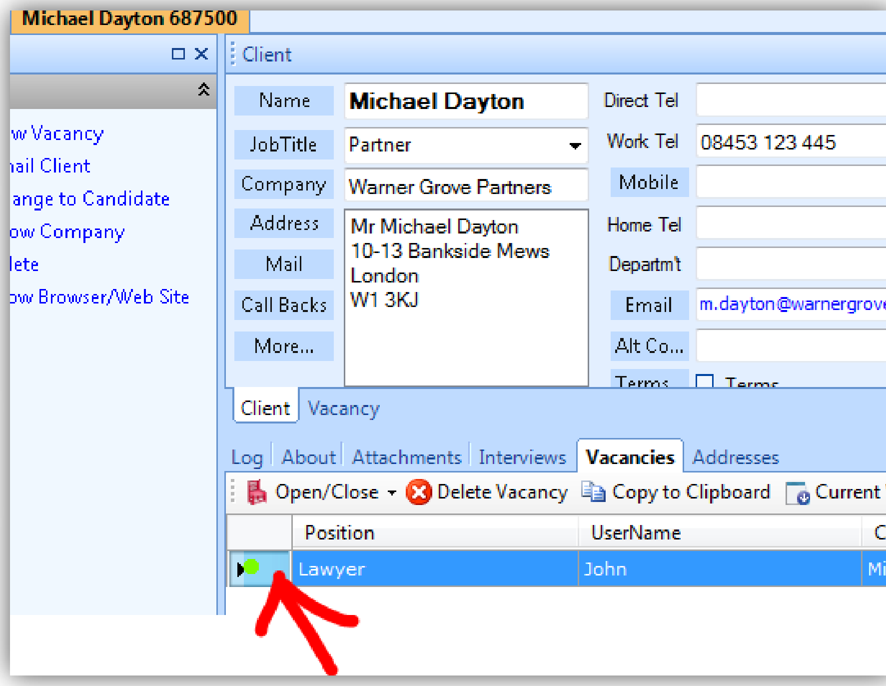
There are two options open to you if one of your clients moves to another company.

- *You can find out where the client has gone, and move the client record to the relevant company record, or create a new company as a potential lead.*
- *Alternatively, if you do not know where the client has moved to, you can still record it in Recruit Studio.*

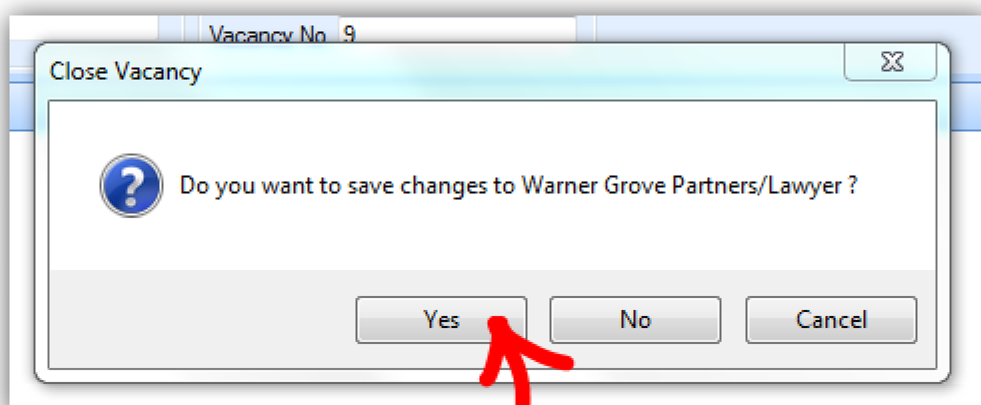
Both options are explained below.

When a client leaves a company, and you know who the new employer is:

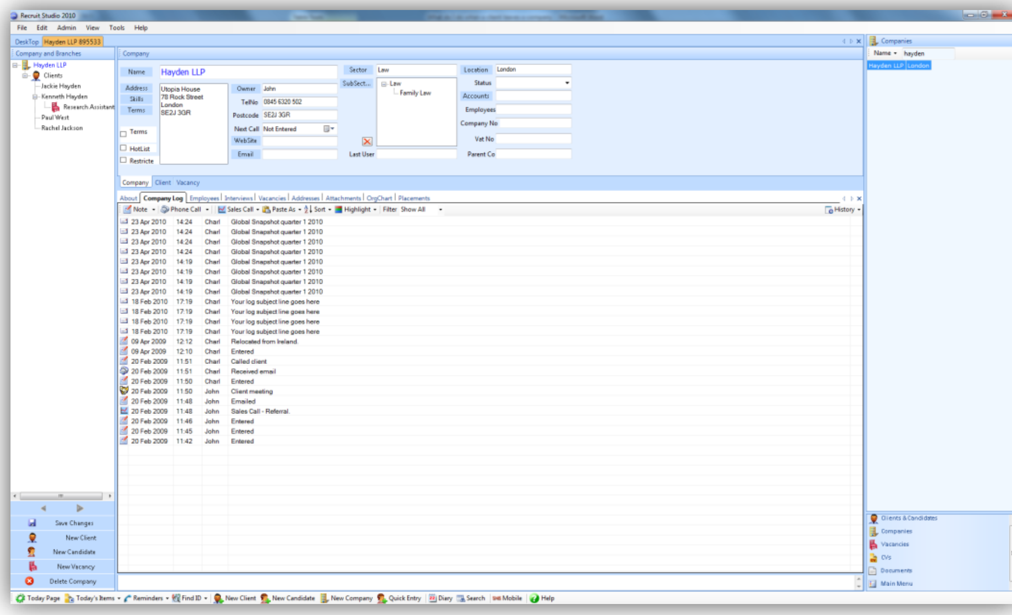
1. Open the client's record and reassign any active vacancies to another client.



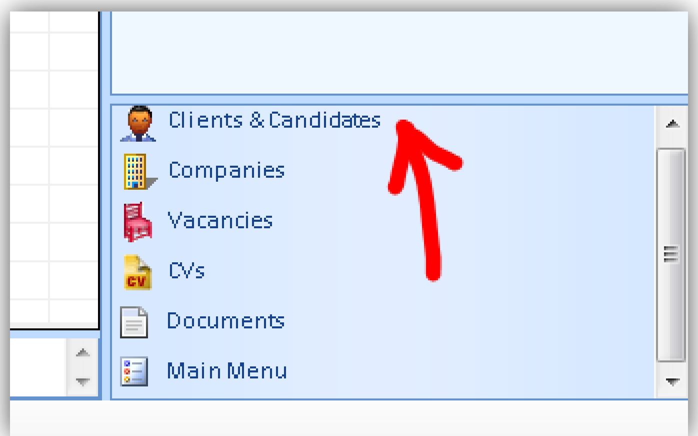
2. Close the client record and save the changes.



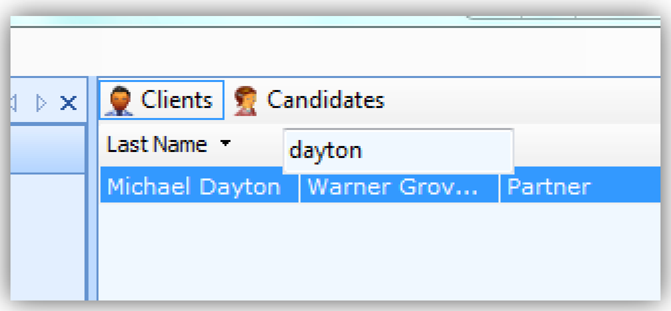
3. Open the new employer's company record or create a new one if you have not already done so.



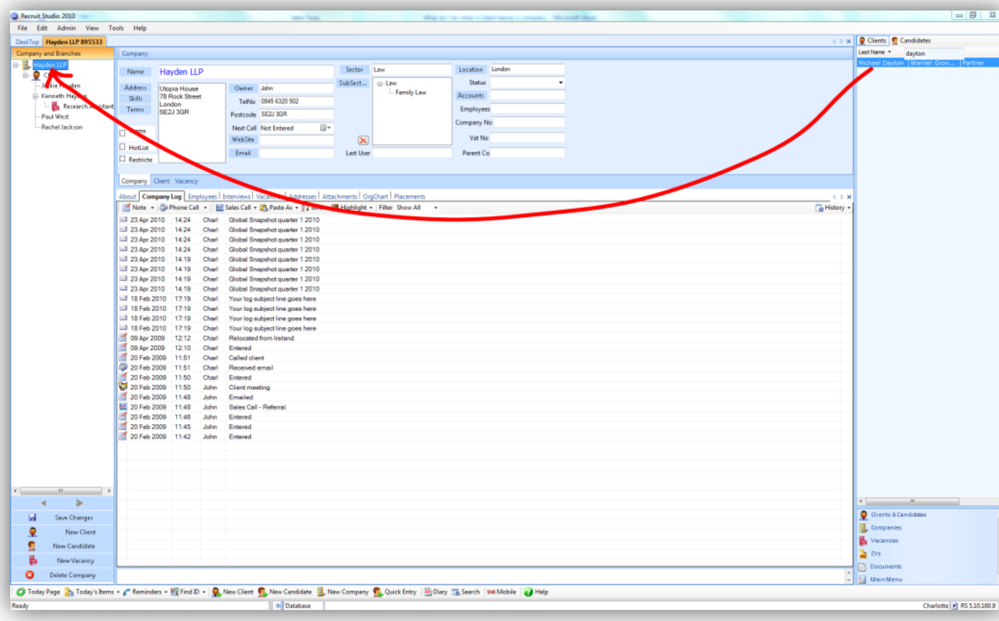
4. On the main menu, click 'Clients & Candidates'.



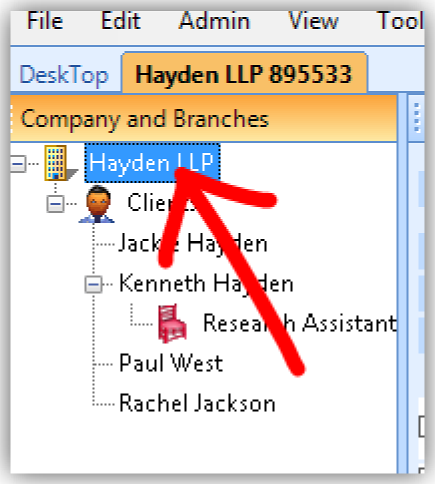
5. Look up the client by name in the usual way but do not open the record.



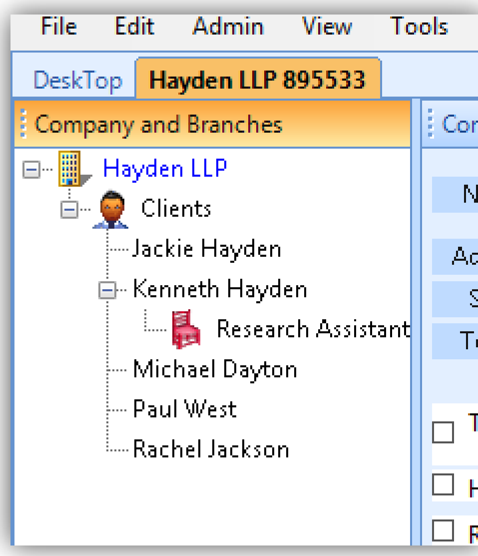
6. Using your mouse, drag the name of the client over to the far left hand side of the company record...



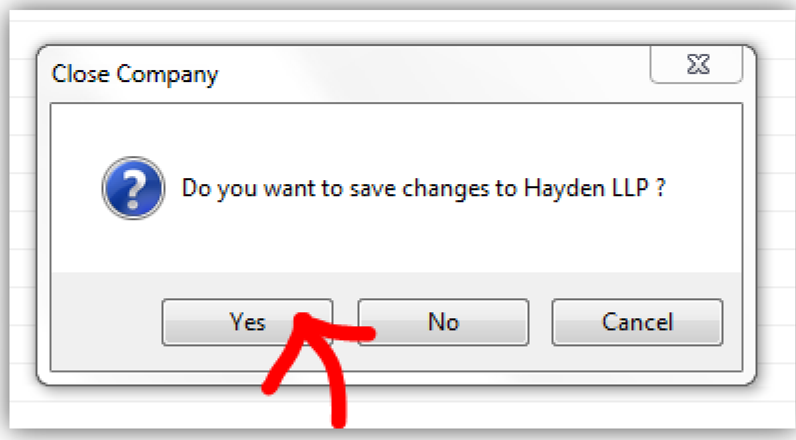
7. Drop the client on top of the company name at the top of the panel. You must let go here otherwise Recruit Studio will not understand the association.



8. The client will be moved to the new company and will be listed in the tree.

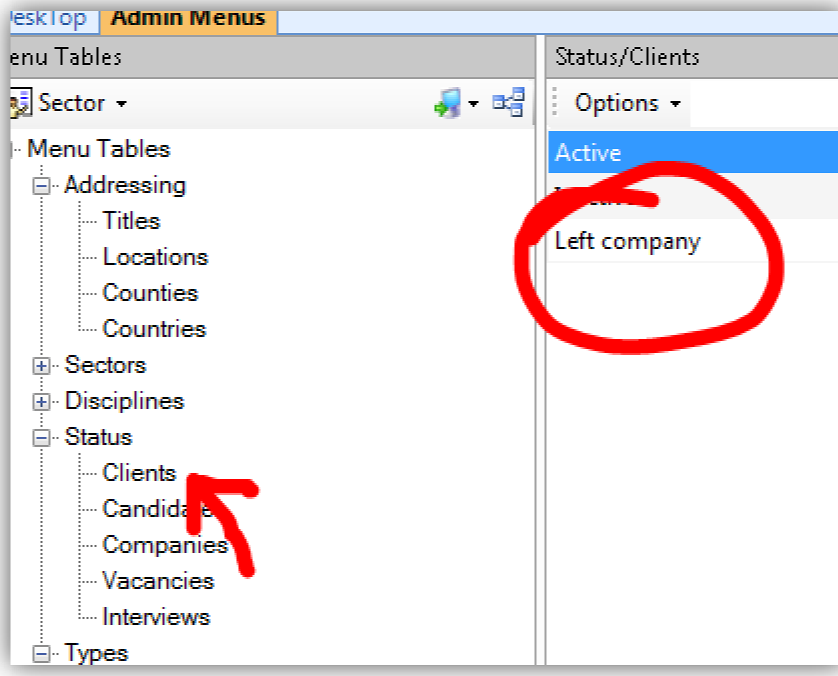


9. Close the company record and save the changes.

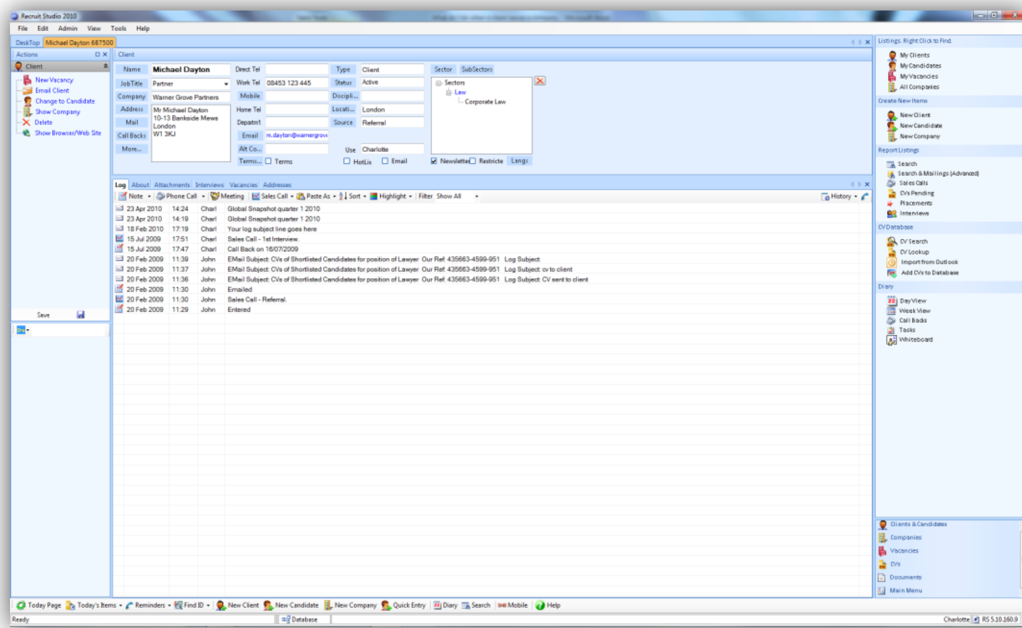


When a client leaves a company but you do not know where he has gone:

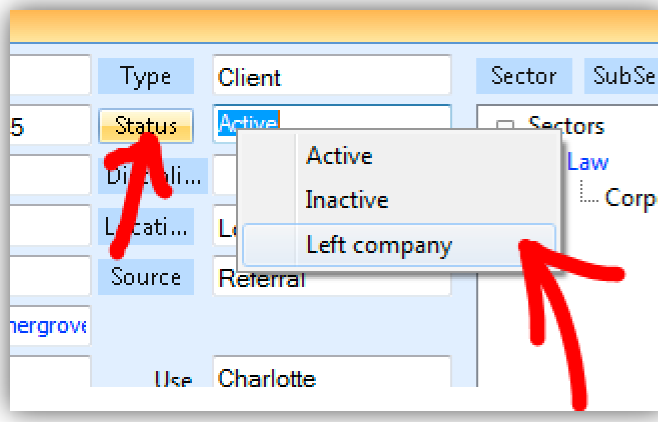
1. The Administrator must set a new special status in the Menu Tables (one time setting). To do this, log in as an Administrator and go to Menu Tables on the Admin menu. Find 'Client' under the Status section of the tree on the left. Create a new status called **Left Company**. This must be written in English and spelled exactly as shown. Close the window and save the changes.



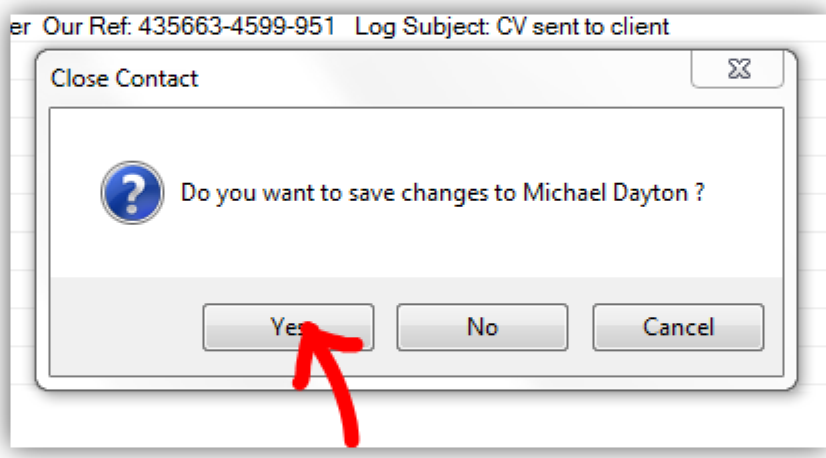
2. Open the client record.



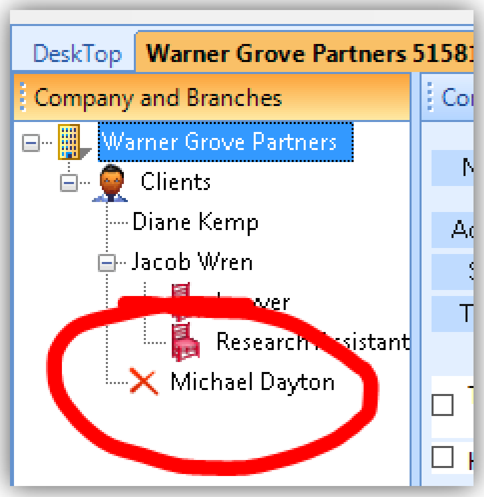
3. Change the status to ‘Left Company’ which should be available in the pull down menu.



4. Close the record and save the changes.



5. When you next open the company record, the client will still be listed in the tree but will have a cross next to his name to indicate that he has left.



6. If you find out at a later date where the client has moved to, you can follow the steps in the previous example and change the client's status back to Active.