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:

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

Michael Dayton 68750	0					
□ x	Client					
*	Name	Michael Dayton	Direct Tel			
w Vacancy	JobTitle	Partner 👻	Work Tel	08453 123 445		
hail Client	Company	Warner Grove Partners	Mobile			
ow Company	Address	Mr Michael Dayton	Home Tel			
lete	Mail	10-13 Bankside Mews London	Departm't			
ow Browser/Web Site	Call Backs	W1 3KJ	Email	m.dayton@warnergrove		
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2. Close the client record and save the changes.

Close Vacancy No. 9
Do you want to save changes to Warner Grove Partners/Lawyer ?
Yes No Cancel

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

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Research Assistant	Terms	London		Tellino 0043 6320 502			Employees				
- Paul West		DE2J JUH		Postcode SE2J 3GR			Company No.				
Rachel Jackson	Terms Net Call Not Entered										
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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.

4 ▷ 🗙	👤 Clients 👮 Candidates
	Last Name 👻 dayton
	Michael Dayton Warner Grov Partner

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

895533										4.5.7	🗙 👰 Clients 🙎 Candidates
s Compan											LestName * dayton
					Paulas	l en c	Institut	Landan			Nichael Dayton Warner
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Skills	7	Rock Stree	et.	TelNo 0845 6320 502		- rainy can	Accounts				
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 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.

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 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.

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Top Michael Dayton 68750	0						4 > x	Listings. Right Click to Find.		
ons D X	Client							My Clients		
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	JobTitle	Partner	Partner Warner Grove Partners Mr Michael Dayton	Work Tel 08453 123 445	Status Active	Sectors		All Companies		
Email Client	Company	Warner Gro		Mobile	Discipli	e Lew		Constant Neurolanese		
Show Company	Address	Mr Michael		Home Tel	Lecati London	- Corporate Law		Contraction in the second seco		
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 Change the status to 'Left Company' which should be available in the pull down menu.



4. Close the record and save the changes.

er Our Ref: 435663-4599-951 Log Subject: CV sent to client
Close Contact
Do you want to save changes to Michael Dayton ?
Yes No Cancel

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.