Getting started with companies and clients

In this tutorial I will help you to get an understanding of companies and clients. Starting with a company record I will show you the layout of the record and show you what information is stored within it. We will then move on to look at clients and how they relate to a company. We'll take a look at a client record and see what information can be stored.

First of all let's establish what a company is.

In Recruit Studio a company record is an overview of all the clients and vacancies at the company. To give an example, a company in your database might be Microsoft, the client is Bill Gates and there is a vacancy for a Developer.

So creating company records is important if you want to see a clear summary of the activity at a company. The information that a company record holds includes:

1. A list of the employees (both clients and candidates)
2. A list of vacancies
3. Contact details
4. The sector, segments and any skills applicable to the company
5. A place to store information such as the company and VAT numbers
6. General notes about the company
7. A list of interviews
8. Additional addresses
9. Any attached files such as Terms of Business

From within the company record you can also create a new client or candidate record as well as create a new vacancy record.

You should create new clients from within the relevant company record otherwise you can cause confusion later if you create them separately.

Let's now look at the parts that make up a company record. To do this, I will open a record that has already been populated with clients to show you a fully working record.

Over on the left of the screen is a list of clients and vacancies who work at the company. It is structured in a tree so you can see which vacancies belong to the clients. If you double-click on a client or vacancy it will open the record in its own right. If you single-click on a client or vacancy the display in the centre of the screen will change to show you contact details and summary of the client or vacancy. You can see the section at the top of the record is arranged on tabs and you can switch views at any point.

If you right-click on the panel on the left, you can see a menu of options, mainly concerned with how the information is displayed in the tree. For instance you can change the view so that the tree is arranged by location or county. This might be useful if the company spans a large geographic area. You can also elect to view or hide the candidates who work at this company. If the list is long you can also sort the names by last or first name.

Now let's take a look at the tabs in the centre of the screen and what information they contain.

The first tab is called ‘About’ and allows you to write or paste text relating to the company. You might like to copy and paste some information from the company’s website for instance.

Alternatively you can add general notes to this section. If you right click you can add a time and date stamp to record the date, time and user who entered the information.

The next tab along is the company log. You need to bear in mind that this log is for the company not an individual so you might maintain a different record of events to a client’s log for instance. Notes that might be saved to company log would be when a mailshot has been sent.

The employees tab shows a list of clients or candidates who work at this company and beneath this is the log for the individual contacts. If you right click on this panel, you can do various actions.

Next we have Interviews which shows a list of interviews – past and pending. You don’t create an interview from this tab it is just for the purposes of showing a summary; however you can send confirmation emails from this tab.

The next tab along is Vacancies and shows current and closed vacancies. You can open or close a vacancy from this screen. If you double-click a vacancy in the list, it will open the vacancy in its own right.

The next tab allows you to store multiple addresses for the company. A company might have more than one office with the main address displaying the head quarters. To add a new address, click the ‘New’ button and enter the address.

The final tab is ‘Attachments’ where you can save shortcuts to documents such as letters, spreadsheets, CVs or job specs. To attach a file, right click the panel and choose ‘browse files’.

Finally, on the bottom left of the screen are a series of blue buttons allowing you to create a new client, candidate or vacancy, or delete the record.

If you want to create a client who works for this company, you should use this button rather than any other new client button to ensure that the client is properly associated with the company.

If you have created a client record independently of the company you can still attach the client to the company so that they appear in the tree on the left. To do this, locate the client on the right-hand panel and drag their name to the tree on the left. This changes the company name in the client record.

So now that you are more familiar with the company record, let’s take a closer look at client records.

As I mentioned earlier, if you click on a client’s name on the tree on the left of the screen you will see an overview of the client in the company record. If you double click the client’s name, their record will open in its own right.

You’ll see that the client record has opened on a separate tab and that much more information can be saved in this view.

At the top are the client’s contact details much of which is inherited from the company record. Beyond the standard contact details such as phone numbers etc, additional information is stored in the blue buttons. For example, if you click the ‘More’ button, you will find fields for holding information that you need to store but may not need to view very often such as reference number, date of next review and alternative email and fax number.

If you click the Terms button you will see fields for the date terms were agreed, the fee that you charge, the payment terms and rebate period.

Over on the left hand side of the screen are two panels. At the top is the actions panel which enables you to create a new vacancy for this client, send an email, change the client to a candidate, open the company record, delete the record and show the client's website.

Beneath this panel are the skills for the client. Storing the skills of a client is entirely optional but you may find it useful if you want to search clients with a view to sending a mailshot for instance. Alternatively you may find it useful to view this panel as a place to store key words so that when you talk with the client you have some handy pieces of information to aid your discussion.

Moving on, we have the tabs in the middle part of the screen where the bulk of the information on this client is stored. The first tab is the log for this client. Second is the 'About' tab where you can browse for a document such as terms of business or information on this client or the company he or she works for. There is also a notes panel so you can write text yourself.

The next tab along is 'Attachments'. Here you can save shortcuts to documents relating to the client such as letters or CVs.

Next is 'Interviews' and, as with the company record, provides an overview of past and pending interviews arranged with this client.

The next tab is 'Vacancies' and shows a list of vacancies. Double-click one to open it in it's own window.

The final tab along is addresses, allowing you to store multiple addresses. If a client moves to another office within the same company, you can simply drag the new address from this panel into their address box at the top.

To recap on what this tutorial has covered:

1. Always create a company record first before adding clients
2. The company record gives an overview of all the clients, vacancies and candidates at the company
3. Open a client or vacancy record in its own window to see the full detail

So now that you have an understanding of the layouts of company and client records, you might like to watch the tutorial titled 'How do I … create a new company?' to learn how to populate a new company record followed by a client.