How do I … create a client record?

In this tutorial I will show you how to create a new client record. This tutorial follows on from 'How do I … create a company record?' You should watch this first and you should also be familiar with the company and client records so it would be a good idea to watch the tutorial called 'Getting started with companies and clients' first.

The best way to create a new client record is to approach it from the company record. This way the client that you create will be properly associated with a company and saves confusion later.

So let's firstly open a company record from the main menu.

On the company record you will see a series of blue buttons on the bottom left of the screen. Click the 'New Client' button and immediately you are asked to enter the client's name.

If you want to check to see if this client is already present in the database, you can click the 'Last name' button and a list of possible matches will be displayed. Assuming that the client is not already in the database, click 'Ok' to continue.

Now the view on the company record changes to show you the client's personal details tab at the top. You will see that the address and telephone number have been inherited from the company details and you can continue to enter the contact details for this client.

If you look at the left hand panel, the tree containing all the clients and vacancies has been updated to include the new client. Also the middle panel has changed to the Employees tab, with the new client listed. A log for this person has also been created.

If you wish, you can leave the client record at this point and continue with your work. Alternatively if there is more information that you wish to add, you can do this by opening the new client's record in its own window. To do this, double-click the client's name on the tree on the left and the new window will open.

Here you could enter some skills or key words for the client using the skills panel on the left. To add skills relating to the sector that the client is in, right click and choose from the list. If your skills list is long, you will need to use the predictive text option at the top. Simply type in the first few characters of a skill and then select it from the list.

You can now work through the tabs in the centre of the record, adding information. In the About panel for instance you might like to browse for a file that you wish to see displayed in the box or add some notes.

Both the Interviews and Vacancies tabs will be populated later so you can leave those for the time being. Lastly you can change the address of the client by dragging an alternative address from the list to the client's address panel.

So now that you have added a new client record, you might like to learn how to create a new vacancy belonging to a client. This is covered in the tutorial titled 'How do I … create a vacancy?'.

For now you should close the client's record and the company to save the changes you have made.