Viewing and Editing the Company File

Article Number: 422 | Rating: Unrated | Last Updated: Aug 4, 2017 at 9:23 AM

Viewing Companies

- From the Dashboard toolbar, click Company or Company File
- The main page has a grid with companies listed alphabetical order.
- There are 3 tabs to help you manage companies.Â The â€œAllâ€• tab includes all organizations in the system.Â The â€œMatchedâ€• tab lists companies that match your current search criteria.Â The â€œSelectedâ€• tab includes all companies you have selected for future viewing.Â
- To view an individual company record - click on the company's name in the grid.

Editing Company Information ***Back to Top***

- Click on the company's name in the grid
- Click on â€œEdit Company Informationâ€• icon.Â Make your edits, and click â€œSaveâ€•.
- To give the company a parent company, click on the Select/Change hyperlink, enter the parent company's name, and click search.Â If the company is found, then select the matching company in the list. Â If it is not found, click â€œAdd Companyâ€•, and fill out the fields.

Searching CompaniesÂ ***Back to Top***

- Alphabetical Search - If you know the company's name, enter it into the search box labeled â€œCompany Lookupâ€•, and click the â€œGoâ€• button.Â The closest match will be highlighted in yellow.Â Â If you want a more exact search, click on the â€œCompany Name Searchâ€• under the Basic Search Tool Bar on the left column â€“ type in the company's name that you are looking for. Â The matches will appear under the â€œMatchedâ€• tab.
- Basic Search - This search is located to the left of the main company grid.Â This should include searches that you most frequently use.Â This can be configured to add or remove criteria. Â Ask your GradLeaders Representative to make desired changes for you.
- Criteria Search - Click on the criteria listed in the basic search or click on the â€œAdvanced Searchâ€• button. Â Then click on the â€œ+â€• symbol to the left of each category and select/enter your search criteria.Â Note: As the user selects the desired qualifiers from each search criteria, the number of matching companies will show in the upper right-hand corner of the page.Â Once all of the criteria and qualifiers have been selected, click â€œView Resultsâ€• button.

Â Saving a Search ***Back to Top***

- Create a search (instructions above). Â Click on the 'Save Search' icon, name your search, and click â€œSaveâ€•.
- Returning to a Saved Search - Click on the â€œCandidate Fileâ€• tab, click on â€œSaved Searchesâ€• sub-menu, and then click on the binocular icon under the view matching column to see your results.

Posted by: KB Admin - Oct 12, 2010 at 9:30 AM. This article has been viewed 3222 times.
Online URL: http://kbint.gradleaders.com/article.php?id=422