## Managing Companies

Article Number: 419 | Rating: Unrated | Last Updated: Jun 5, 2014 at 4:58 PM

Each company’s information can be managed and edited by utilizing the actions made available to the admin. All of the selected actions are shown above the company list in the action toolbar.

### Selecting Companies

- Select a single company - From the main company page, select the desired company by clicking on the name from the list. To view the selected company, click on the â€œSelectedâ€• tab.
- Selecting a batch of organizations - From the All, Matched, or Selected tabs, hover over Select Column at the top of the page.
- To view your selected companies - Click on the â€œSelectedâ€• tab.Â
  - Select Page
  - Select All
  - Deselect Page
  - Deselect All

##### Exporting Company Data *Back to Top*

- Export - From the All, Matched, or Selected tabs, you can export company data by clicking on the â€œExport Companyâ€• icon.
- Select your data to export from the new window.Â
- Click Download CSV Export.

##### Adding Company Notes *Back to Top*

- From the main company grid, click on the company’s name, and then click the â€œAdd Notesâ€• icon in the action toolbar. Draft the note, change the date if necessary, select the desired note visibility, and if you want candidates to view the note, click â€œVisible to Studentsâ€•. Â Then click â€œAdd Noteâ€•.
- From the main company grid and from the All, Matched, or Selected tabs, click â€œAdd Noteâ€• icon in the action tool bar. Â Draft the note, change the date if necessary, select the desired note visibility, and if you want candidates to view the note, click "Visible to Students". Â Then click â€œSaveâ€•.
- Share Notes - To share your note with others in your office, select either â€œPersonalâ€• or â€œPublic/Sharedâ€• from the Admin Visibility drop-down menu.Â
- Confidential Notes - To keep your note confidential, select "Personal" from the Admin Visibility drop-down menu.
- Filter Notes - Select to filter by â€œMy Notesâ€• or â€œAll Public Notesâ€• from the Filter By drop-down menu.
- Viewing Notes - From the Company grid, click on the note icon which will appear next to the company’s name. Â All previous notes will be listed by date and user entry (listed below).

**Printing Companies** [Back to Top]

- From the main company grid page, click on the box next to the company's name, and then click the â€œPrintâ€• icon from the action toolbar.Â
- From the All, Matched, or Selected tabs, click the â€œPrintâ€• icon.

**Changing Company Status** [Back to Top]

- Company Status' are as follows:Â
  - Active = viewable to candidates only if the â€œCompany Researchâ€• Tab is turned on in the candidate view.
  - Inactive = not viewable to candidates
  - Pending = not viewable to candidates - this status can be the default status for new organizations that sign into the employer system.Â
- Changing the Status for a company - From the main candidate grid page, click on the company's name. Â You will see a drop-down menu called â€œCurrent Statusâ€•. Â Select the appropriate status for the company.Â
- Changing the Company Status in a Batch - From the All, Matched, or Selected tabs, click on the â€œChange Statusâ€• Icon.Â Select the appropriate status you want to give to the batch, and click â€œSaveâ€•.

**Adding a Company** [Back to Top]

- Adding a company - Click on the â€œAdd Companyâ€• icon from the All, Matched, or Selected tabs.Â Enter the company's name, and click the â€œFind Companyâ€• button. Â If no matching company is found, click the â€œAdd Companyâ€• button, enter all company information, and click â€œSaveâ€•.Â

**Deleting a Company** [Back to Top]

- From the main company grid page, click on the company's name, and then click on the â€œDeleteâ€• icon.Â If a company has transactions on file, it may not be able to be deleted.Â In this case, you should make these organizations inactive.Â Â

**Combining Companies** [Back to Top]

*(more information can be found in the [Combining Companies] category)*

- If you have a duplicate company or a company that has changed its name, you will need to combine the organizations.
- From the Company File, click on the â€œCombine Companyâ€• sub-menu.
- Click â€œSelect Source Companyâ€• - This is the company you no longer want on file. Â Search for the company by name, and click on the correct result.
- Click â€œSelect Destination Companyâ€• - This is the company you want to keep.
- Click â€œCombine Companyâ€• list - When the box comes up showing numerous organizations, click on the correct result.
- This process removes the old company and moves over the contacts and job postings from the source company to the destination company.Â

**Viewing Company Detail** [Back to Top]

- From the main company page, click on the company's name.
- There are 4 tabs:
  - Profile - This tab displays the company's details
  - Contacts - This tab is a list of contacts associated with this company.
  - Company Notes - This tab allows the user to add a note for the company and lists previous notes.
  - Contact Notes - This tab allows the user to add a note for the contacts within the company and lists previous note
  - Activity Summary - This tab allows the user to view Company Activity Types.Â If your school only has the Job File, the only Activity Type listed will be Job Posting.Â
    - This tab can be filtered to a specific date range

Posted by: KB Admin - Oct 11, 2010 at 4:00 PM. This article has been viewed 2969 times.

Online URL: http://kbint.gradleaders.com/article.php?id=419