

Viewing and Editing the Company File

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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 "All" tab includes all organizations in the system.Â The "Matched" tab lists companies that match your current search criteria.Â The "Selected" 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 "Edit Company Information" icon.Â Make your edits, and click "Save".
- 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 "Add Company", 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 "Company Lookup", and click the "Go" button.Â The closest match will be highlighted in yellow.Â Â If you want a more exact search, click on the "Company Name Search" under the Basic Search Tool Bar on the left column " type in the company's name that you are looking for. Â The matches will appear under the "Matched" 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 "Advanced Search" button. Â Then click on the "+" 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 "View Results" 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 "Save".
- Returning to a Saved Search - Click on the "Candidate File" tab, click on "Saved Searches" sub-menu, and then click on the binocular icon under the view matching column to see your results.

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