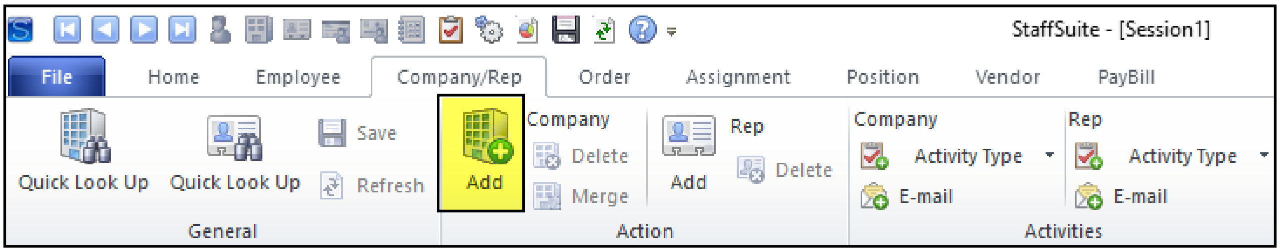
Adding Companies and Company Reps

To add a company, go to the **Company/Rep Ribbon** and select the **Add Company** icon. The Company Add Wizard will then open.

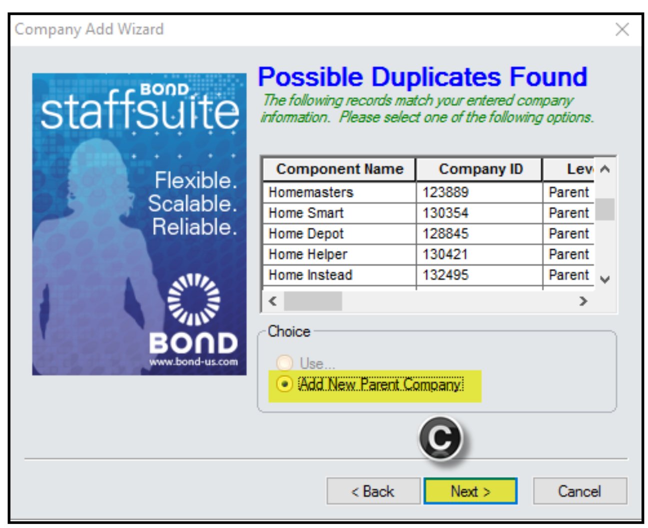


Company Add Wizard: Company Lookup

The first screen within the Company Add Wizard is the Company Lookup, which is used to see if the company is already listed in StaffSuite. It's best to enter all information while you are adding the company or company rep, but if you don't have the information at that time you can input the missing data later.

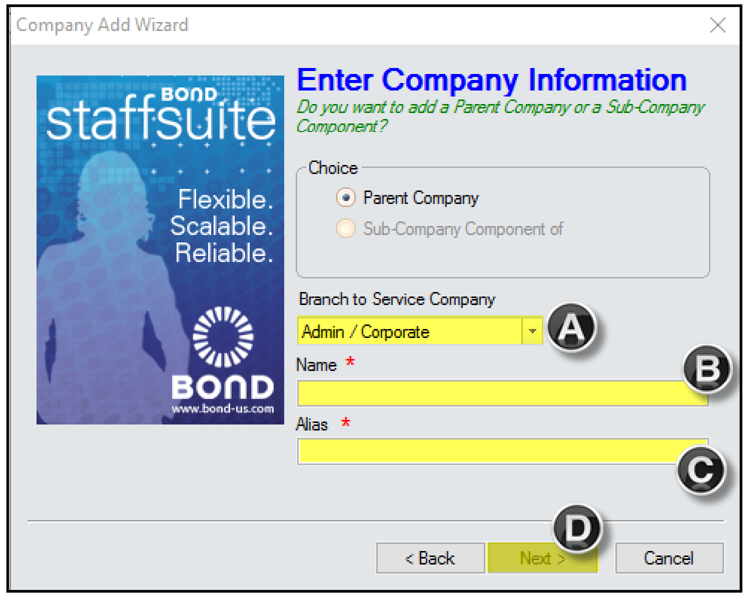
A Within the **Parent** field, type the company name. You may enter a partial name. Adding an asterisk at the beginning and then typing the first letters of the company name will search for any company with those letters.

B Leave the **Branch Servicing** as **All**, in case another branch has added the company.



C After clicking **Next**, any duplicates will be shown. Resizing the grid will allow you to view which branch the company is associated with. If you see the company is already listed for your branch, go ahead and hit cancel. If a company is listed but it does not match the company name you are looking for, then select **Add New Parent Company** and click **Next**.

Company Add Wizard: Enter Company Information



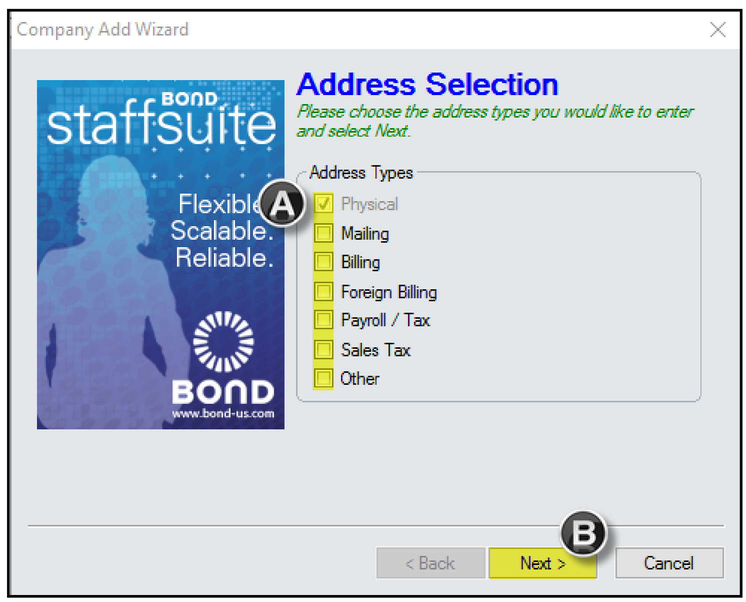
A Choose the appropriate branch from the **Branch to Service Company** drop down.

B Then enter the company **Name.** Selecting the tab key after entering the **Name** will auto-populate the **Alias** field to be the same. Generally, the Alias field is not changed. **A red asterisk in StaffSuite means the particular field is required.**

C If the company has a different **Alias** change the pre-populated field.

D Then select **Next**.

Company Add Wizard: Address Selection



A The **Physical Address** will be automatically chosen. This is the actual address of where the associates will be working. Check the box next to any other address type that needs to be entered, such as Billing. Billing address is needed in the event that invoices need to be sent to a different location, such as a corporate office.

B Then select **Next**.

Within the next screen, enter the physical address information. If there is a suite or building number, don't just type in the number, as it will randomly print in the address. Add it as "Suite 102" or "Building 10". Then select **Next**. If you are adding multiple addresses be sure to note the **Address Type** identified when typing the information.

Company Add Wizard: Enter Phone Information

Within the fields provided, add the company's **Main Phone Number** and, if available, **Fax Number**. This should be the company's information, not be the rep's. Then select **Next**.

Company Add Wizard: Relationship Manager

A Click the **binoculars** next to the **Service Rep** field. The Service Rep can be a Branch Manager or Staffing Manager. Go ahead and search for the appropriate person and select **Next**. From the list of Staffing Service Reps that appear, click on the appropriate name and select **Finish**.

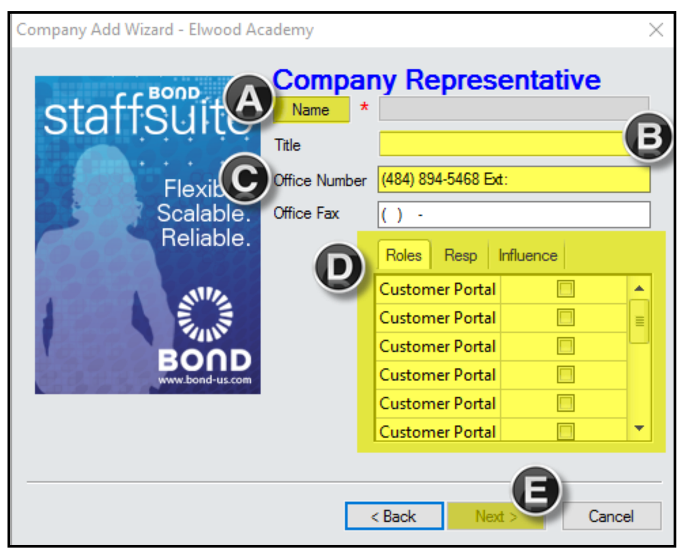
B Then click the binoculars next to the **Sales Rep** field. This field is important because it ensures the right person gets credit for the account.

C Within the **Acquisition Source** dropdown, select how the client heard about us.

D In the **Acquisition Date** field, enter the date the client was first contacted, which should be the day the company is being added. This should default to the date you are entering the information.

E Then select **Next**.

Company Add Wizard: Company Representative



A Select the **Name** button to enter the company rep's name. The Nickname field should be the same as their first name, unless they go by another name. The Name information is required, so if you don't know the person's name, it's recommended that you type "Unknown" and change it later.

B Enter the representative's **title** or leave it blank if unknown.

C The **Office Number** defaults to the company's main phone number. Enter an extension or delete the main number and put in the direct number.

D Select **roles**, **responsibilities**, and **influences** related to the individual. If the information is unknown, it can be edited at a later time.

E Select the **Next** button. The wizard only requires one rep, so if the company has multiple reps, you will need to add the additional reps after finishing the wizard.

Company Add Wizard: Verify Company Structure

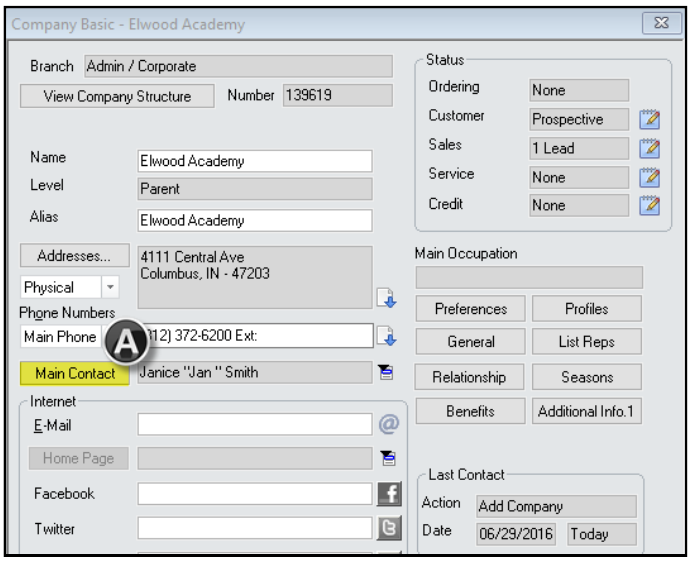
This is an overview of the structure that was just added. Click the **Finish** button. At that time, the Company Add Wizard will close and the Company Basic information will appear.

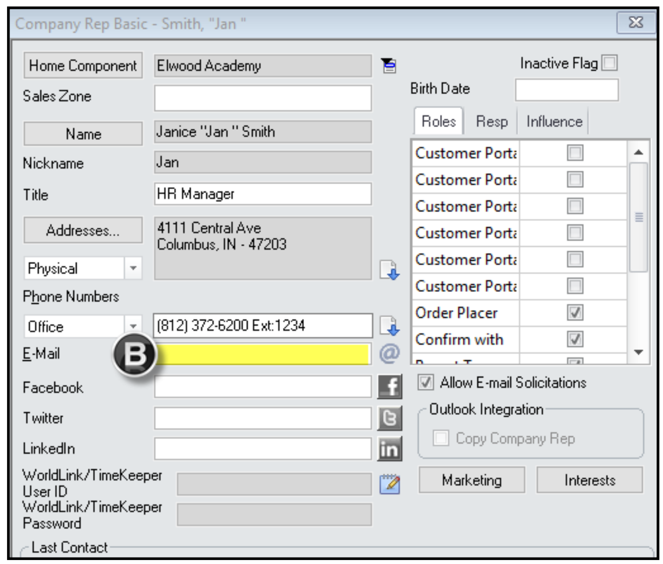
Company Basic

Add new information as you receive it.

A Select the **Main Contact** button. The representative's information will then appear on the screen.

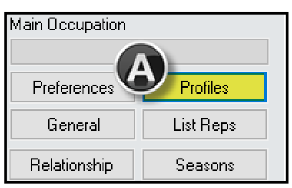
B Enter the **Email** address and any other personal information you may have for the representative.



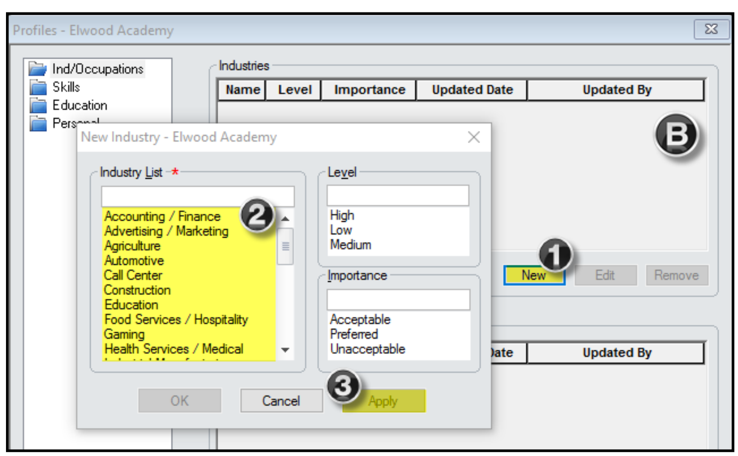


Company Basic: Profiles (optional)

A Return to the Company Basic and select the **Profiles** button.



B The only information that needs to be added is the **Industries**. Select **New** in the **Industries** screen, and add the Industry that pertains to the company.



Company Basic: General Information (optional)

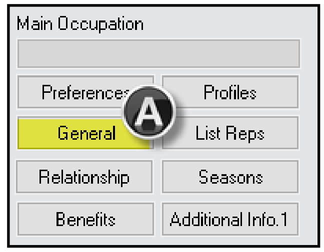
A Return to the Company Basic and select the **General** button.

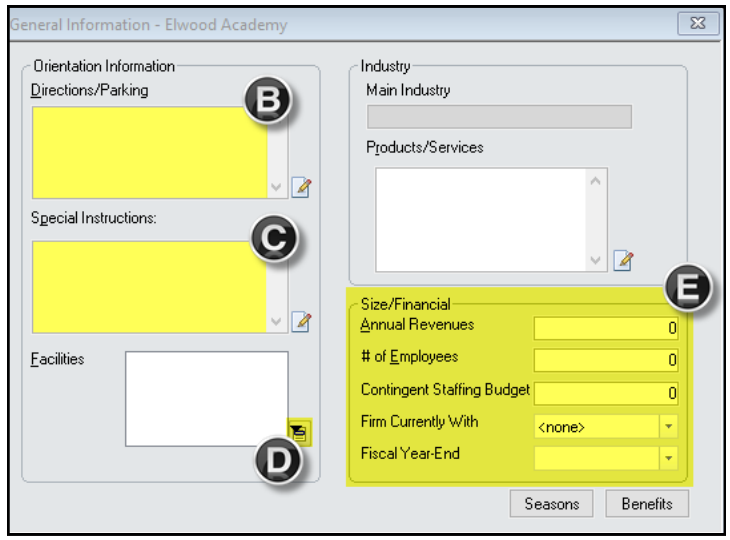
B Within the **Directions/Parking** field, type detailed directions to the company. Note any specifics as to where associates should park.

C Within the **Special Instructions** field, include any client specifications or information that might be helpful to the associate.

D The **Facilities** filter allows you to select amenities that the client has onsite.

E Complete the **Size/Financial** fields to the best of your knowledge. Leave the fields blank if the information is not known. Commas cannot be used in these fields.

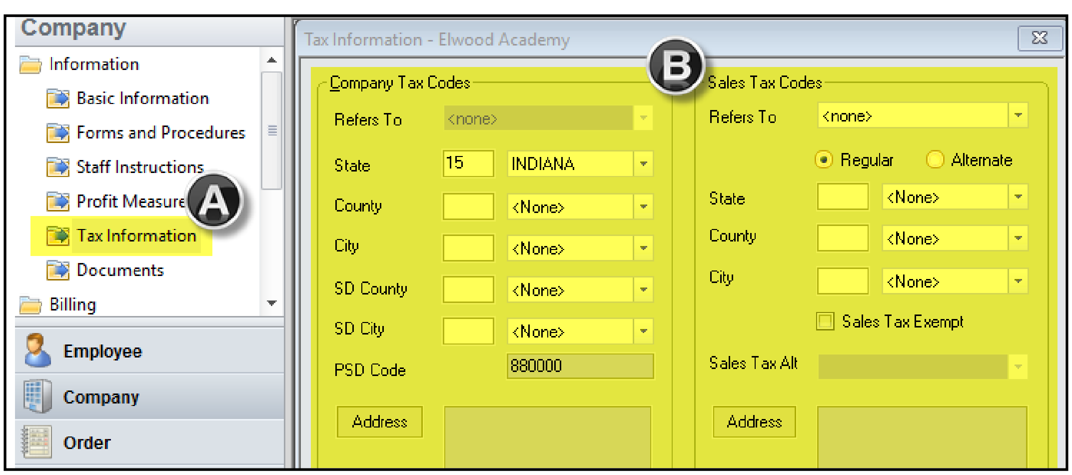




Tax Information (typically not completed until the company becomes Elwood Staffing's client)

A Select **Tax Information** from the **Company Information Navigation Pane.**

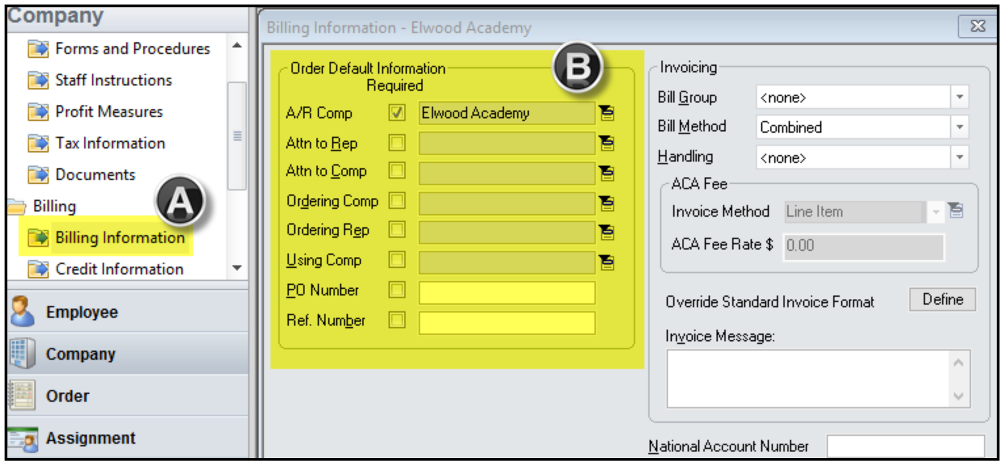
B Then complete the **Company Tax Codes** and **Sales Tax Codes** information. Leave the **Refers To** field as **None** and select the State, County, and City (confirm the company physical address is within the city limits - leave blank if it isn't).



Billing Information (typically not completed until the company becomes Elwood Staffing's client)

A Within the **Company Navigation Pane**, go to the **Billing** folder and select **Billing Information**. This is where specifics are entered regarding invoices.

B The default will be A/R Comp. If the invoice needs to be to the attention of a specific rep, select that rep from the filter options. If the individual's name is not found in the list, they will need to be added as a company rep. Never add a rep with the name "accounts receivable" for invoices. Also be sure to check mark to the left to indicate it is required on all orders.



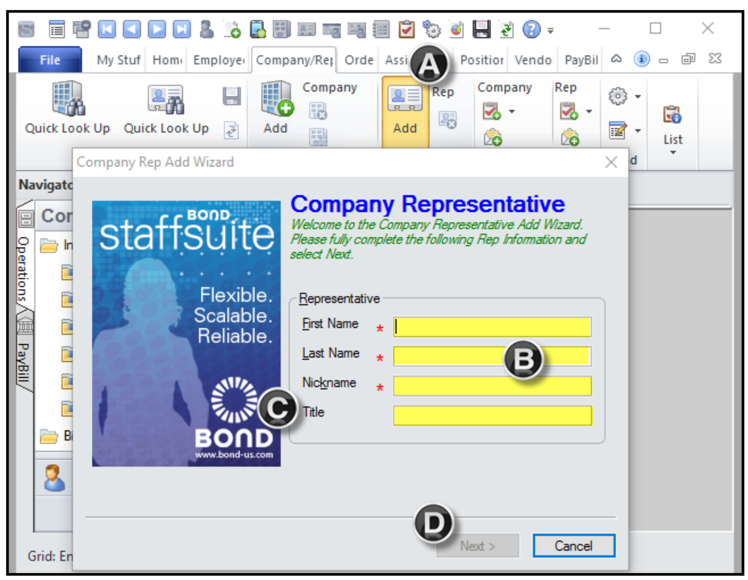
Add Company Rep

A To add a company representative, go to the **Company/Rep** ribbon and select the **Add Rep** button.

B Enter the **First** and **Last** name of the rep, as well as their **Nickname**.

C Then enter their **Title**.

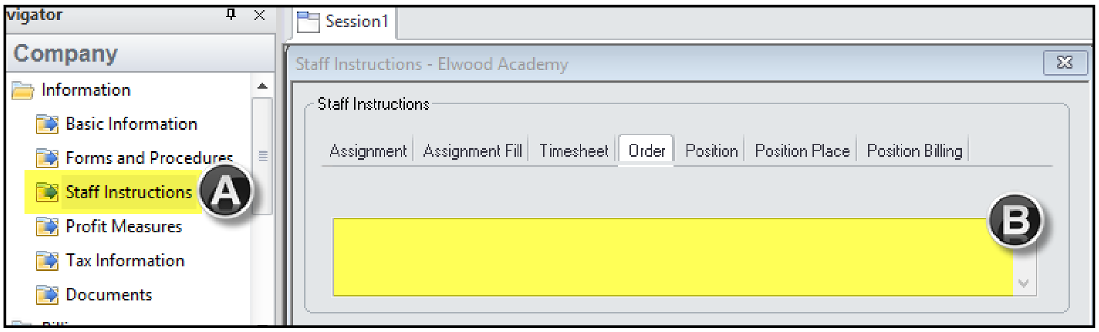
D Select **Next** and enter the name of the company the rep is being added to. Go through the Wizard to complete the process.



Staff Instructions

A Go to the **Company Information Navigation Pane** and select **Staff Instructions**. Notes that are added to the **Order** tab will be shown when branch personnel are viewing the order. Notes that are added to the **Assignment** and **Assignment Fill** tabs will appear when staff are working on an open assignment. **Timesheet** notes will appear when processing payroll.

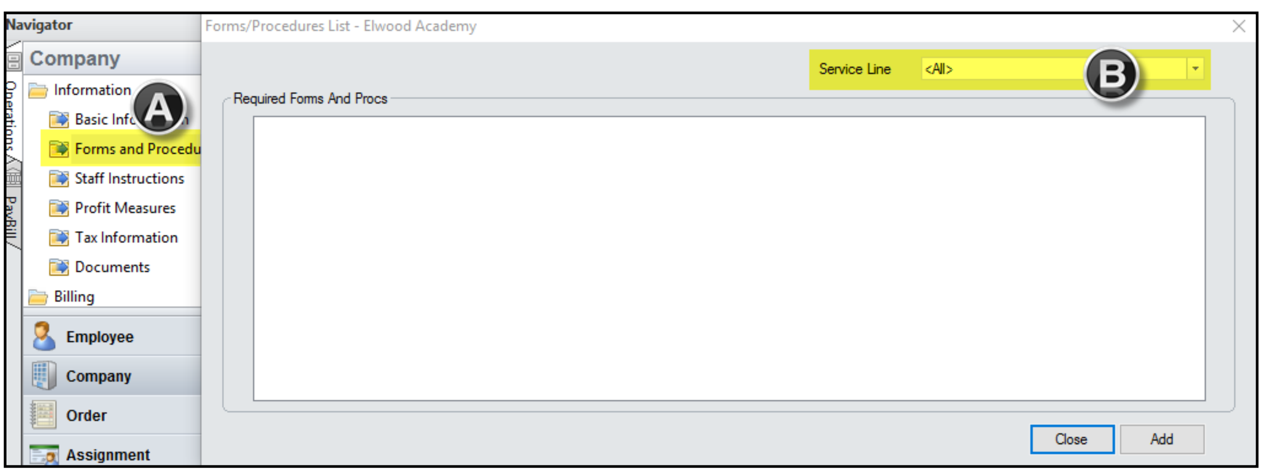
B List client specifics, such as steel toed shoes, long pants, or anything else required by the client. These instructions can be copied and pasted in the Assignment and Assignment Fill tabs.



Forms and Procedures

A In the **Company Information Navigation Pane**, go to **Forms and Procedures**.

B Select the items that are required by the company. When an assignment is filled, if any of the Forms and Procedures were not put in at the associate level, a reminder will come up alerting you that something is missing.

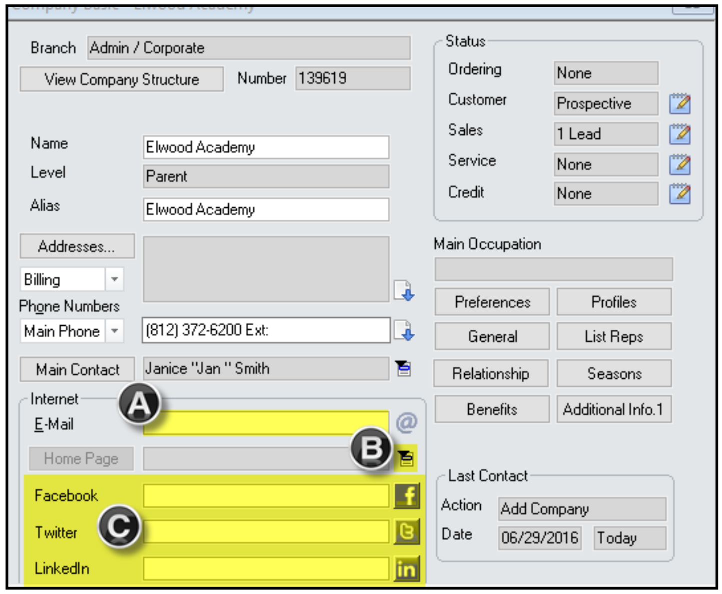


Internet (optional)

A Within the Company Basic, enter the company's **Email** address, if applicable. This may be left blank. Never put the rep email address here.

B Add the company website by selecting the filter button next to the **Home Page** field. Then click **New**, type the address, and select **OK**. Select the web page from the results and click the **Home** button.

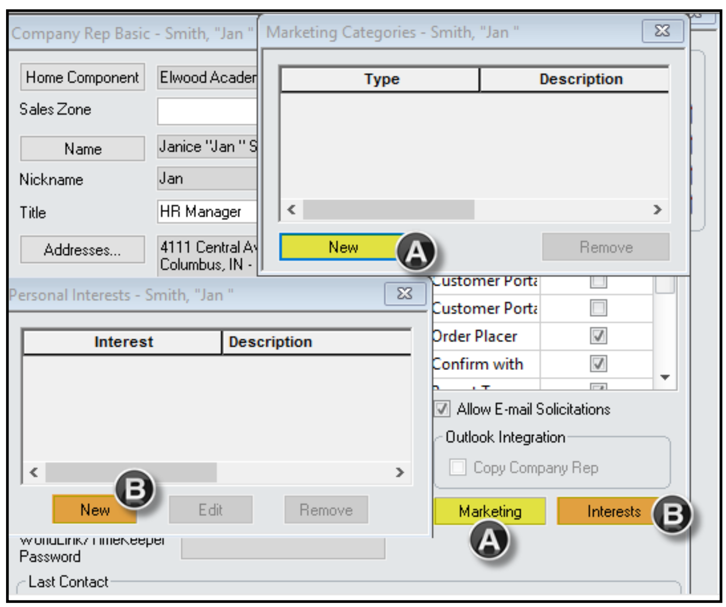
C **Facebook**, **Twitter**, and **LinkedIn** information can be entered the same way as B. Then once each icon is selected it will automatically bring up that page online.



Marketing (optional)

A Within the Company Rep file select the **Marketing** button, then the items that have been given to the representative.

B Select the **Interests** button and enter notes regarding the representative's interests. This can help build a better relationship with the representative.



Inactive Reps

If a rep leaves a company, his/her information is not to be deleted or edited. We want to keep the relationship history on file. Instead, check the Inactive Flag box. If he/she is the Main Contact, you will have to select another rep or add a new rep and select that person as the Main Contact.