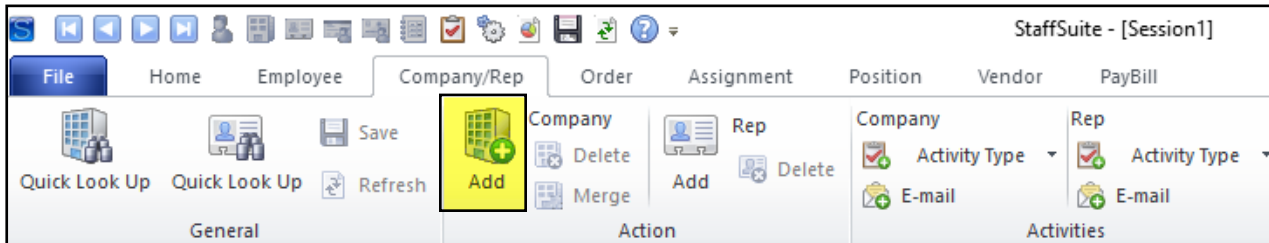


# Adding Companies and Company Reps

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



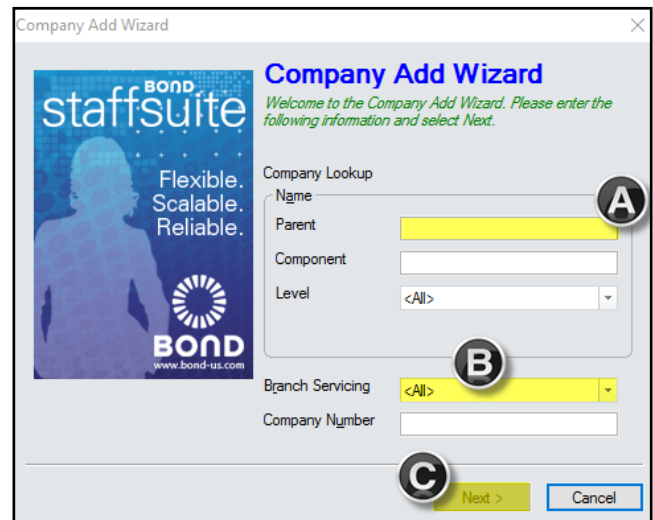
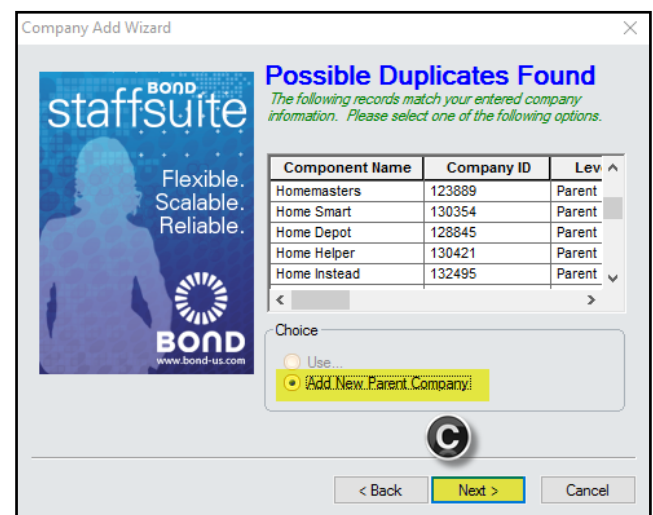
## Company Add Wizard: Company Lookup

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**.

A screenshot of the 'Company Add Wizard' dialog box. The title is 'Company Add Wizard'. The main heading is 'Company Add Wizard' with a sub-heading 'Welcome to the Company Add Wizard. Please enter the following information and select Next.' Below this is a 'Company Lookup' section with fields for 'Name', 'Parent', 'Component', and 'Level'. The 'Parent' field is highlighted with a yellow box and labeled 'A'. Below the 'Company Lookup' section are 'Branch Servicing' (set to '<All>' and labeled 'B') and 'Company Number' fields. At the bottom right, there is a 'Next >' button (labeled 'C') and a 'Cancel' button.A screenshot of the 'Company Add Wizard' dialog box showing 'Possible Duplicates Found'. The title is 'Company Add Wizard' and the sub-heading is 'The following records match your entered company information. Please select one of the following options.' Below this is a table with columns 'Component Name', 'Company ID', and 'Lev'. The table contains five rows of data. Below the table is a 'Choice' section with two radio buttons: 'Use...' and 'Add New Parent Company!'. The 'Add New Parent Company!' option is selected and highlighted with a yellow box and labeled 'C'. At the bottom, there are '< Back', 'Next >', and 'Cancel' buttons.

## 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 - Elwood Academy

### Relationship Manager

Service Rep  **A**

Sales Rep  **B**

Acquisition Source  **C**

Acquisition Date  **D**

**E**

## 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 - Elwood Academy

### Company Representative

Name  **A**

Title  **B**

Office Number (484) 894-5468 Ext:  **C**

Office Fax ( ) -

| Roles           | Resp                     | Influence                |
|-----------------|--------------------------|--------------------------|
| Customer Portal | <input type="checkbox"/> | <input type="checkbox"/> |
| Customer Portal | <input type="checkbox"/> | <input type="checkbox"/> |
| Customer Portal | <input type="checkbox"/> | <input type="checkbox"/> |
| Customer Portal | <input type="checkbox"/> | <input type="checkbox"/> |
| Customer Portal | <input type="checkbox"/> | <input type="checkbox"/> |
| Customer Portal | <input type="checkbox"/> | <input type="checkbox"/> |

**E**

## 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 - Elwood Academy

Branch Admin / Corporate

View Company Structure Number 139619

Name Elwood Academy

Level Parent

Alias Elwood Academy

Addresses... 4111 Central Ave  
Columbus, IN - 47203

Physical

Phone Numbers

Main Phone (812) 372-6200 Ext:

**A** Main Contact Janice "Jan" Smith

Internet

E-Mail

Home Page

Facebook

Twitter

Status

Ordering None

Customer Prospective

Sales 1 Lead

Service None

Credit None

Main Occupation

Preferences Profiles

General List Reps

Relationship Seasons

Benefits Additional Info.1

Last Contact

Action Add Company

Date 06/29/2016 Today

Company Rep Basic - Smith, "Jan"

Home Component Elwood Academy

Sales Zone

Name Janice "Jan" Smith

Nickname Jan

Title HR Manager

Addresses... 4111 Central Ave  
Columbus, IN - 47203

Physical

Phone Numbers

Office (812) 372-6200 Ext:1234

**B** E-Mail

Facebook

Twitter

LinkedIn

WorldLink/TimeKeeper User ID

WorldLink/TimeKeeper Password

Last Contact

Inactive Flag

Birth Date

Roles Resp Influence

Customer Porta

Customer Porta

Customer Porta

Customer Porta

Customer Porta

Order Placer

Confirm with

Allow E-mail Solicitations

Outlook Integration

Copy Company Rep

Marketing Interests

## 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.

Main Occupation

Preferences **A** Profiles

General List Reps

Relationship Seasons

Profiles - Elwood Academy

Ind/Occupations

Skills

Education

Personal

Industries

| Name | Level | Importance | Updated Date | Updated By |
|------|-------|------------|--------------|------------|
|------|-------|------------|--------------|------------|

New Industry - Elwood Academy

Industry List \*

- Accounting / Finance **2**
- Advertising / Marketing
- Agriculture
- Automotive
- Call Center
- Construction
- Education
- Food Services / Hospitality
- Gaming
- Health Services / Medical

Level

Importance

Acceptable

Preferred

Unacceptable

**1** New Edit Remove

OK Cancel **3** Apply

## 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.

Main Occupation

Preferences Profiles

**General** List Reps

Relationship Seasons

Benefits Additional Info.1

General Information - Elwood Academy

Orientation Information

Directions/Parking **B**

Special Instructions: **C**

Facilities **D**

Industry

Main Industry

Products/Services

**E**

Size/Financial

Annual Revenues 0

# of Employees 0

Contingent Staffing Budget 0

Firm Currently With <none>

Fiscal Year-End

Seasons Benefits

## 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).

Company

Information

- Basic Information
- Forms and Procedures
- Staff Instructions
- Profit Measure
- Tax Information** **A**
- Documents

Billing

Employee

Company

Order

Tax Information - Elwood Academy

**B**

Company Tax Codes

Refers To <none>

State 15 INDIANA

County <None>

City <None>

SD County <None>

SD City <None>

PSD Code 880000

Address

Sales Tax Codes

Refers To <none>

Regular  Alternate

State <None>

County <None>

City <None>

Sales Tax Exempt

Sales Tax Alt

Address

## 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.

| Order Default Information Required |  |
|------------------------------------|--|
| A/R Comp                           | <input checked="" type="checkbox"/> Elwood Academy |
| Attn to Rep                        | <input type="checkbox"/>                           |
| Attn to Comp                       | <input type="checkbox"/>                           |
| Ordering Comp                      | <input type="checkbox"/>                           |
| Ordering Rep                       | <input type="checkbox"/>                           |
| Using Comp                         | <input type="checkbox"/>                           |
| PO Number                          | <input type="checkbox"/>                           |
| Ref. Number                        | <input type="checkbox"/>                           |

## 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.

Company Rep Add Wizard

Company Representative

Welcome to the Company Representative Add Wizard. Please fully complete the following Rep information and select Next.

Representative

First Name \*

Last Name \*

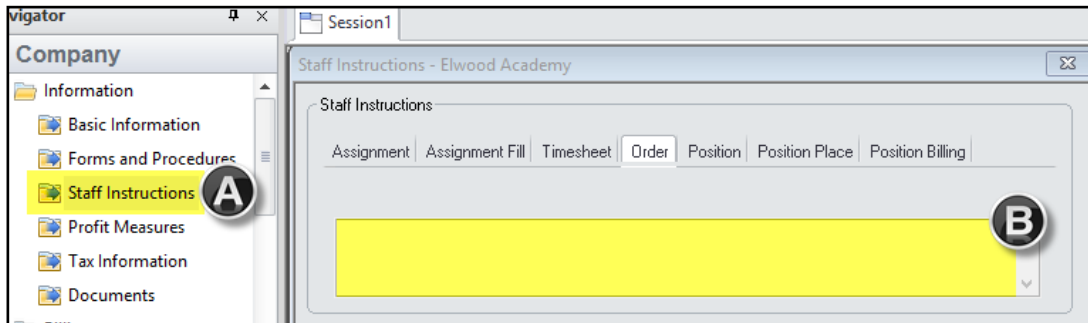
Nickname \*

Title

Next > Cancel

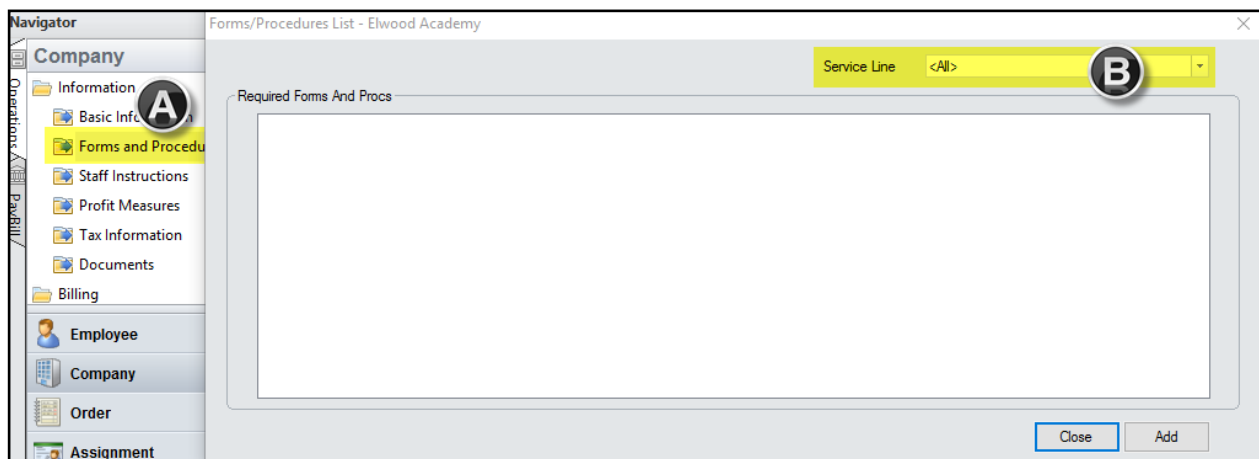
## Staff Instructions

- 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.

Company Basic - Elwood Academy

Branch: Admin / Corporate  
View Company Structure: Number 139619

Name: Elwood Academy  
Level: Parent  
Alias: Elwood Academy

Addresses...  
Billing: [Dropdown]  
Phone Numbers: [Dropdown]  
Main Phone: (812) 372-6200 Ext: [Dropdown]

Main Contact: Janice "Jan" Smith

Internet: [Dropdown] (A)  
E-Mail: [Text Field] (A)  
Home Page: [Dropdown] (B)  
Facebook: [Dropdown] (C)  
Twitter: [Dropdown]  
LinkedIn: [Dropdown]

Status: [Dropdown]  
Ordering: None  
Customer: Prospective  
Sales: 1 Lead  
Service: None  
Credit: None

Main Occupation: [Dropdown]  
Preferences: [Dropdown]  
Profiles: [Dropdown]  
General: [Dropdown]  
List Reps: [Dropdown]  
Relationship: [Dropdown]  
Seasons: [Dropdown]  
Benefits: [Dropdown]  
Additional Info.1: [Dropdown]

Last Contact: [Dropdown]  
Action: Add Company  
Date: 06/29/2016 Today

## 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.

Company Rep Basic - Smith, "Jan"

Home Component: Elwood Acader  
Sales Zone: [Dropdown]  
Name: Janice "Jan" S  
Nickname: Jan  
Title: HR Manager  
Addresses...: 4111 Central A  
Columbus, IN

Marketing Categories - Smith, "Jan"

| Type       | Description |
|------------|-------------|
| [Dropdown] | [Dropdown]  |

Personal Interests - Smith, "Jan"

| Interest   | Description |
|------------|-------------|
| [Dropdown] | [Dropdown]  |

Marketing: [Button] (A)  
Interests: [Button] (B)

Customer Port: [Dropdown]  
Order Placer: [Dropdown]  
Confirm with: [Dropdown]  
Allow E-mail Solicitations: [Checked]  
Outlook Integration: [Dropdown]  
Copy Company Rep: [Dropdown]

Marketing: [Button] (A)  
Interests: [Button] (B)

## 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.

Birth Date: [Text Field]  
Roles: [Dropdown]  
Resp: [Dropdown]  
Influence: [Dropdown]  
Inactive Flag: [Checkbox]