

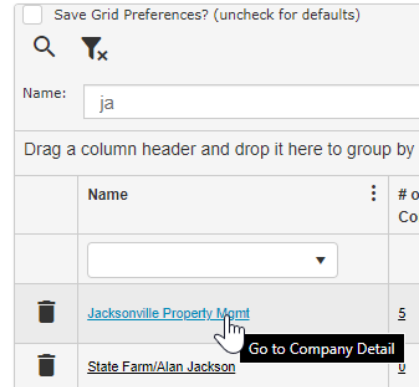
## Company - Search and Page Overview

### Company Search Options

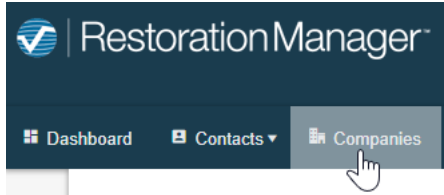
**Option 1:** From the **Search** located to the top right of the page select Company Name from the drop-down. Begin typing in the Company Name select your enter key or the magnifying glass to complete the search. The less you type in the more results you will return. Single click the Company Name the contact will be added to.



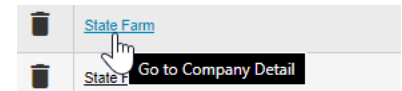
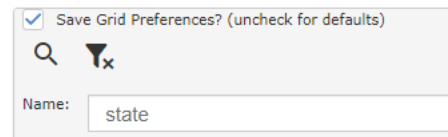
### View Companies



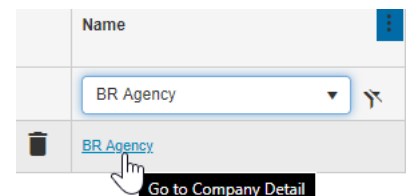
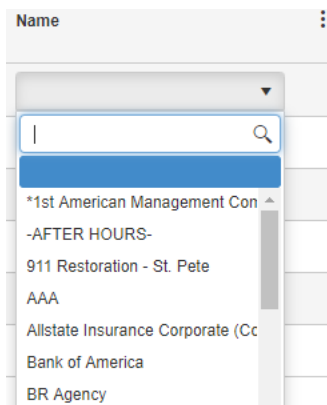
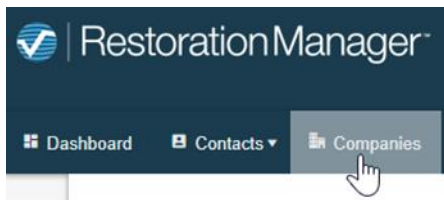
**Option 2:** Single click on **Companies** in the toolbar, next search within the **Name** search field select your enter key or the magnifying glass to complete the search. The less you type in the more results you will return. Single click the Company Name the contact will be added to.



### View Companies



**Option 3:** Single click on **Companies** in the toolbar, next search for the Company from the **Name** drop-down menu once you make the selection single click the Company Name the contact will be added to.



## Company - Search and Page Overview

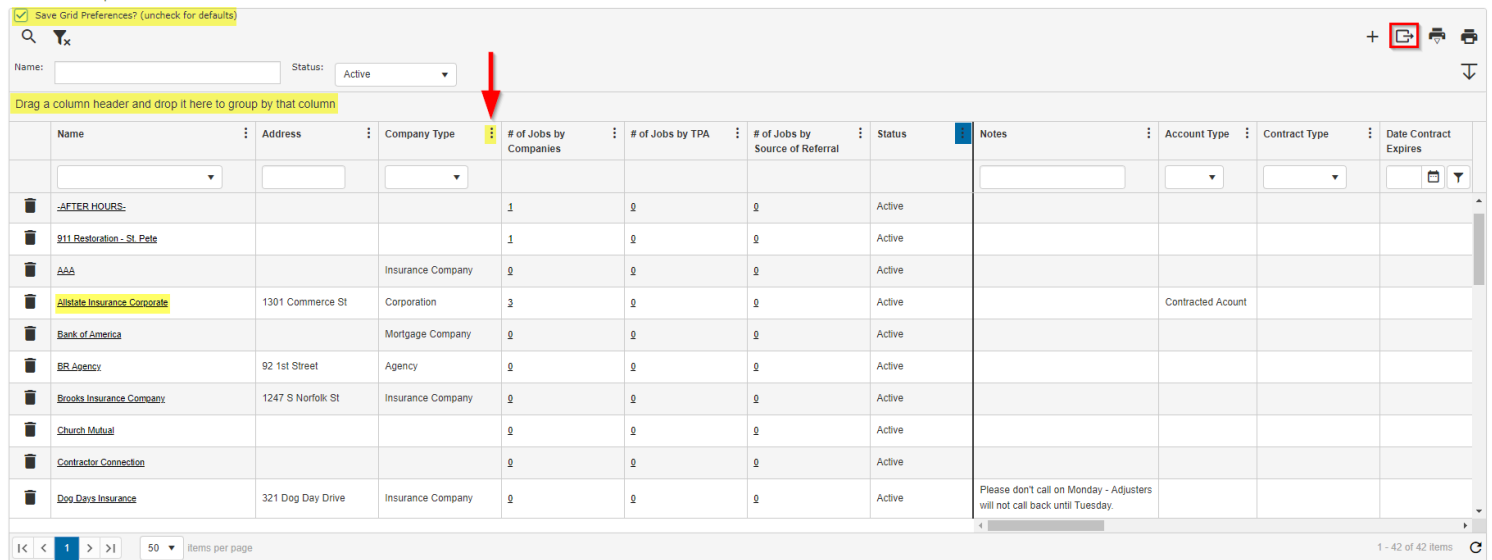
### Companies Page

- If the page doesn't pre-load click the **Magnifying Glass icon** located to the top left of the page to load all companies.
- After you have arranged the grid / page layout Click the Save Grid Preference located to the top left of the Page. **IMPORTANT:** *Uncheck Save Grid Preferences if any changes are going to be made to the grid / page layout. After the changes are complete re-check Save Grid Preferences.*
- Additional search fields are available within the grid by selecting the three dots.
- Column locking can be completed by dragging and dropping the column to the left of the black line or by selecting the three dots within the column then click lock or unlock.
- To be redirected to the Company Detail Page click the hyperlink within the Name Column.
- The Columns to the left of the black line are locked and stay visible as you scroll the right-hand side.  
*Tip: In the blank space to the top left of the grid then you can use your left and right keys to move the grid.*
- Drag a Column Header to group the page by that column.

### Columns available within the Grid

Name (Company Name), # of Jobs by Companies, # of Jobs by TPA, # of Jobs by Referral, Primary Account Manager, Address, City, State, County, Code, Notes, Status, Account Type, Company Type, Contract Status, Date Contract Expires, Industry Group, Sub Group, Estimator, Project Manager, Lead Tech (Staff 2 – Description).

View Companies



View Companies

Save Grid Preferences? (uncheck for defaults)

Name:  Status: Active

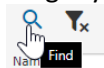
Drag a column header and drop it here to group by that column

Name	Address	Company Type	# of Jobs by Companies	# of Jobs by TPA	# of Jobs by Source of Referral	Status	Notes	Account Type	Contract Type	Date Contract Expires
-AFTER HOURS-			1	0	0	Active				
911 Restoration - St. Pete			1	0	0	Active				
AAA		Insurance Company	0	0	0	Active				
Alstate Insurance Corporate	1301 Commerce St	Corporation	3	0	0	Active		Contracted Account		
Bank of America		Mortgage Company	0	0	0	Active				
BR Agency	92 1st Street	Agency	0	0	0	Active				
Brooks Insurance Company	1247 S Norfolk St	Insurance Company	0	0	0	Active				
Church Mutual			0	0	0	Active				
Contractor Connection			0	0	0	Active				
Dog Days Insurance	321 Dog Day Drive	Insurance Company	0	0	0	Active	Please don't call on Monday - Adjusters will not call back until Tuesday.			

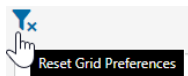
1 - 42 of 42 items

### Icon Functions

Magnifying Glass icon is a Find/Search function



Funnel icon – Resets Grid Preferences



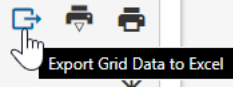
Plus + icon – Add Company



For an overview on how to Add a Company refer to the following reference document; **Companies – How to Add** available on the University under Training Documents → Sales & Marketing

## Company - Search and Page Overview

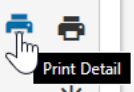
Export Grid Data to Excel, any column locked on the left-hand side of the view jobs page is locked in the export.



### Sample - Export Grid Data

Name	Address	Company Type	# of Jobs by Company	# of Jobs by TPA	# of Jobs by Source of	Status	Notes	Account Type
*1st American Management Company	3408 Atlantic Blvd	Property Management	0	0	0	Active		
-AFTER HOURS-			1	0	0	Active		
911 Restoration - St. Pete			1	0	0	Active		
AAA		Insurance Company	0	0	0	Active		
Allstate Insurance Corporate	1301 Commerce St	Corporation	3	0	0	Active		Contracted Account
Bank of America		Mortgage Company	0	0	0	Active		
BR Agency	92 1st Street	Agency	0	0	0	Active		
Brooks Insurance Company	1247 S Norfolk St	Insurance Company	0	0	0	Active		
Church Mutual			0	0	0	Active		
Contractor Connection			0	0	0	Active		
Dog Days Insurance	321 Dog Day Drive	Insurance Company	0	0	0	Active	Please don't call on Monday - Adjuste	
Dog House Agency	5510 Exploration Dr	Agency	0	0	0	Active	Closed on Wednesday	
Don Johnson Agency	21 1st Street	Agency	0	0	0	Active		
DRB Agency	6969 N.W. 1st Street	Agency	0	0	0	Active		
Erie Insurance		Insurance Company	0	0	0	Active		
Farley's Insurance	526 Sun Ridge Blvd	Insurance Company	0	0	0	Active		
FogHorn Leghorn Insurance Agency	558 Airtech Pkwy	Agency	0	0	0	Active		

### Print Detail – Prints Company Detail Report



### Sample – Company Detail Report

RM Restoration  
 7991 Shaffer Parkway, Suite 300  
 St. Petersburg, FL 32250  
 Office: (303) 800-5182



#### Company Detail

10/27/2019

##### \*1st American Management Company

Status: Active

City: Jacksonville

County:

State: FL

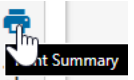
Sub-Division:

Notes: Hours of Operation

Monday - Saturday: 9AM-8PM

Sunday: Closed

### Print Summary – Prints Company Summary Report



### Sample – Company Summary Report

RM Restoration  
 7991 Shaffer Parkway, Suite 300  
 St. Petersburg, FL 32250  
 Office: (303) 800-5182



#### Company Summary

10/27/2019

Project	City	State	Status
*1st American Management Company	Jacksonville	FL	Active
-AFTER HOURS-			Active
911 Restoration - St. Pete			Active
AAA			Active
Allstate Insurance Corporate	Houston	TX	Active
Bank of America			Active
BR Agency	Jacksonville Beach	FL	Active
Brooks Insurance Company	Indianapolis	IN	Active
Church Mutual			Active

**Note:** Reports can only be printed from this page if the Administrator has checked the permission within your employee record.

### Arrow Down - Expands the Grid

