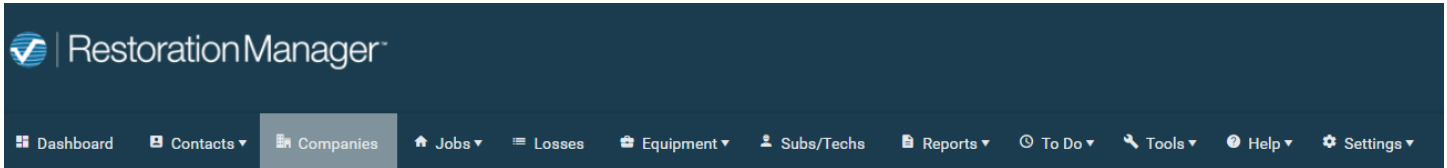


Company – Grid Preferences

To setup Company Grid Preferences navigate to the Companies page from by selecting Companies from the navigation tool bar.

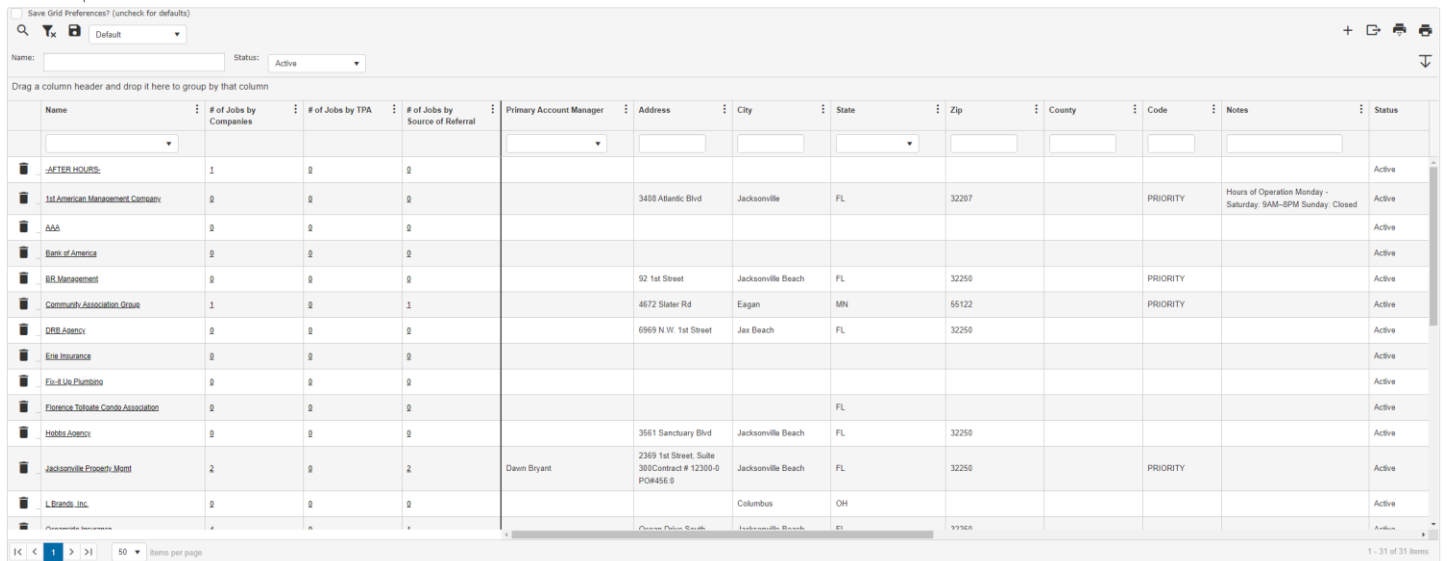


If the page doesn't preload click the **Magnifying Glass** icon (Q) located to the top left of the page.

Columns available within the Grid

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

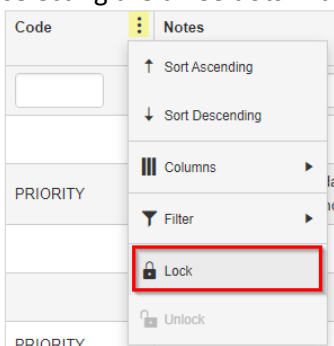
View Companies



| Name | # of Jobs by Companies | # of Jobs by TPA | # of Jobs by Source of Referral | Primary Account Manager | Address | City | State | Zip | County | Code | Notes | Status |
|------------------------------------|------------------------|------------------|---------------------------------|-------------------------|--|--------------------|-------|-------|--------|----------|--|--------|
| AFTER HOURS | 1 | 0 | 0 | | | | | | | | | Active |
| 1st American Management Company | 0 | 0 | 0 | | 3408 Atlantic Blvd | Jacksonville | FL | 32207 | | PRIORITY | Hours of Operation Monday - Saturday 5AM-6PM Sunday Closed | Active |
| AAA | 0 | 0 | 0 | | | | | | | | | Active |
| Bank of America | 0 | 0 | 0 | | | | | | | | | Active |
| BR Management | 0 | 0 | 0 | | 92 1st Street | Jacksonville Beach | FL | 32250 | | PRIORITY | | Active |
| Community Association Group | 1 | 0 | 1 | | 4672 Slater Rd | Eagan | MN | 55122 | | PRIORITY | | Active |
| CRB Agency | 0 | 0 | 0 | | 6969 N.W. 1st Street | Jax Beach | FL | 32250 | | | | Active |
| Erie Insurance | 0 | 0 | 0 | | | | | | | | | Active |
| Fac. Life Plumbing | 0 | 0 | 0 | | | | | | | | | Active |
| Florence Toluato Condo Association | 0 | 0 | 0 | | | | FL | | | | | Active |
| Hobbs Agency | 0 | 0 | 0 | | 3561 Sanctuary Blvd | Jacksonville Beach | FL | 32250 | | | | Active |
| Jacksonville Property Maint | 2 | 0 | 2 | Dawn Bryant | 2309 1st Street, Suite 300 Contract # 12300-0 PDM456.0 | Jacksonville Beach | FL | 32250 | | PRIORITY | | Active |
| L Brands, Inc. | 0 | 0 | 0 | | | Columbus | OH | | | | | Active |

Within in the grid you can move columns, lock columns, filter columns, and group columns.

1. Move columns by dragging and dropping.
2. 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 click lock or unlock.



Company – Grid Preferences

Locked columns display to the left of the black line and stay visible as you scroll the right-hand side.

| <input type="checkbox"/> Save Grid Preferences? (uncheck for defaults) | | | | | | | |
|--|------------------------|------------------|---------------------------------|---------------------|----------|--|--|
| 🔍 🗑️ 📄 Default | | | | | | | |
| Name: | | Status: Active | | | | | |
| Drag a column header and drop it here to group by that column | | | | | | | |
| Name | # of Jobs by Companies | # of Jobs by TPA | # of Jobs by Source of Referral | Company Type | Code ↓ | Address | |
| | | | | | PRIORITY | | |
| Jacksonville Property Mgmt | 2 | 0 | 2 | Property Management | PRIORITY | 2369 1st Street, Suite 300 Contract # 12300-0 PO#456.0 | |
| 1st American Management Company | 0 | 0 | 0 | Property Management | PRIORITY | 3408 Atlantic Blvd | |
| BR Management | 0 | 0 | 0 | Property Management | PRIORITY | 92 1st Street | |
| Pinnacle | 0 | 0 | 0 | Property Management | PRIORITY | | |
| Community Association Group | 1 | 0 | 1 | Property Management | PRIORITY | 4672 Slater Rd | |

- Additional searches can be completed in the field under the column header description or by selecting the three dots → Filter.

| <input type="checkbox"/> Save Grid Preferences? (uncheck for defaults) | | | | | | | |
|--|------------------------|------------------|---------------------------------|---------------------|----------|--|-------------------------|
| 🔍 🗑️ 📄 Default | | | | | | | |
| Name: | | Status: Active | | | | | |
| Drag a column header and drop it here to group by that column | | | | | | | |
| Name | # of Jobs by Companies | # of Jobs by TPA | # of Jobs by Source of Referral | Company Type | Code ↓ | Address | Primary Account Manager |
| | | | | | PRIORITY | | |
| Jacksonville Property Mgmt | 2 | 0 | 2 | Property Management | PRIORITY | 2369 1st Street, Suite 300 Contract # 12300-0 PO#456.0 | Jacksonville Beach |
| 1st American Management Company | 0 | 0 | 0 | Property Management | PRIORITY | 3408 Atlantic Blvd | |
| BR Management | 0 | 0 | 0 | Property Management | PRIORITY | 92 1st Street | |
| Pinnacle | 0 | 0 | 0 | Property Management | PRIORITY | | |
| Community Association Group | 1 | 0 | 1 | Property Management | PRIORITY | 4672 Slater Rd | |
| Sean Agency | 0 | 0 | 0 | Agency | PRIORITY | | |

Company – Grid Preferences

4. Drag a Column Header to group the page by that column.

Save Grid Preferences? (uncheck for defaults)

Name: Status:

↑ Company Type ×

| | Name | # of Jobs by Companies | # of Jobs by TPA | # of Job by Source of Referral | Company Type ↑ | Code | Address |
|--|--|------------------------|------------------|--------------------------------|-------------------------------|-------------------------------|-------------------------------|
| | <input type="text" value=""/> | | | | <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value=""/> |
| Company Type: Agency | | | | | | | |
| <input type="button" value="T"/> | DRB Agency | 0 | 0 | 0 | Agency | | 6969 N.W. 1st Street |
| <input type="button" value="T"/> | State Farm/Alan Jackson | 0 | 0 | 0 | Agency | | |
| <input type="button" value="T"/> | State Farm/Nettles | 0 | 0 | 0 | Agency | | |
| <input type="button" value="T"/> | Tom & Jerry Agency | 0 | 0 | 0 | Agency | | 21 1st Streetcar |
| <input type="button" value="T"/> | State Farm/Blake Shelton | 0 | 0 | 0 | Agency | | 2514 S Beach Pkwy |
| <input type="button" value="T"/> | Hobbs Agency | 0 | 0 | 0 | Agency | | 3561 Sanctuary Blvd |
| Company Type: Corporation | | | | | | | |
| <input type="button" value="T"/> | L Brands, Inc. | 0 | 0 | 0 | Corporation | | |
| Company Type: Insurance Company | | | | | | | |
| <input type="button" value="T"/> | USAA | 0 | 0 | 0 | Insurance Company | | |
| <input type="button" value="T"/> | State Farm | 1 | 0 | 2 | Insurance Company | | |
| <input type="button" value="T"/> | AAA | 0 | 0 | 0 | Insurance Company | | |
| <input type="button" value="T"/> | Erie Insurance | 0 | 0 | 0 | Insurance Company | | |
| <input type="button" value="T"/> | Oceanside Insurance | 4 | 0 | 1 | Insurance Company | | Ocean Drive South |

5. After the Companies page is arranged to your preference you can save the grid layout by selecting the Save Grid Preferences icon (📁) located to the top left of the page.
6. The Save Company Grid View popup will display.

Save Company Grid View

City - Jacksonville [shared by: Dawn Bryant]

Zip Code - 32250

Settings Name:

Personal
 Selected Users

7. **Settings Name:** apply the grid description (50 character limitation).

Company – Grid Preferences

8. **Grid View:** Personal or Selected Users
 - a) If **Personal** is selected the grid is only available to you.
 - b) If **Selected Users** is selected then you can provide access to the grid for other users to view.
 - Available for all users: check this option if you would like all users to have access to view the grid
 - Otherwise you can select which users can access the grid by selecting their name from the search bar.

Save Company Grid View

City - Jacksonville [shared by: Dawn Bryant]
Zip Code - 32250

Settings Name:

Personal
 Selected Users
 Available for all users

Dawn Bryant ×
Kathleen Mitscher ×
Marketing Rep ×
×

Job Coordinator

Kathleen Mitscher

Ken A. Davenport

Lead Tech

Lisa Paris

Mark Harris

Marketing Rep

Michael Olsen

9. To save the Grid View click **Save Grid Settings** icon (🔒)
10. Select the saved/shared companies grid views from the dropdown

View Companies

Save Grid Preferences? (uncheck for defaults)

| Name | # of Jobs by TPA | # of Jobs by Source of Referral |
|--|------------------|---------------------------------|
| PRIORITY Accounts [shared by: Marketing Rep] | | |
| Zip Code - 32250 | | |
| Company Type: Agency | | |
| DRB Agency | 0 | 0 |
| State Farm/Alan Jackson | 0 | 0 |