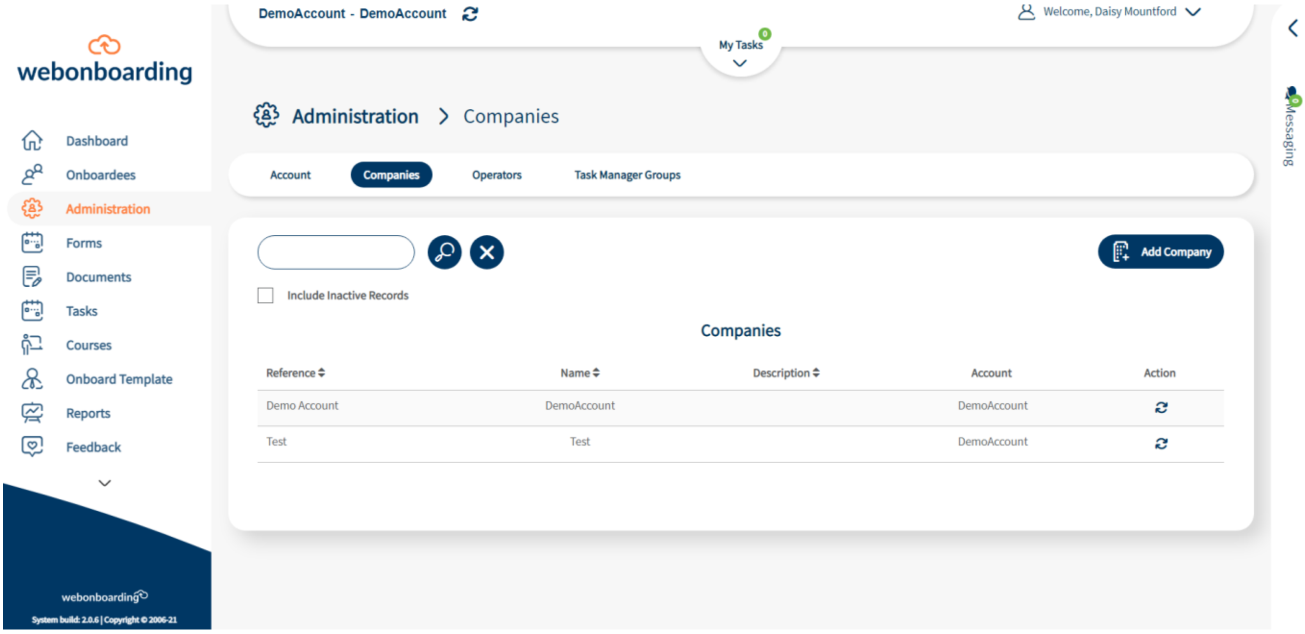
Creating a Company

This document contains a step by step guide to creating a company.
Each company can be an entity of your business.

Adding a company

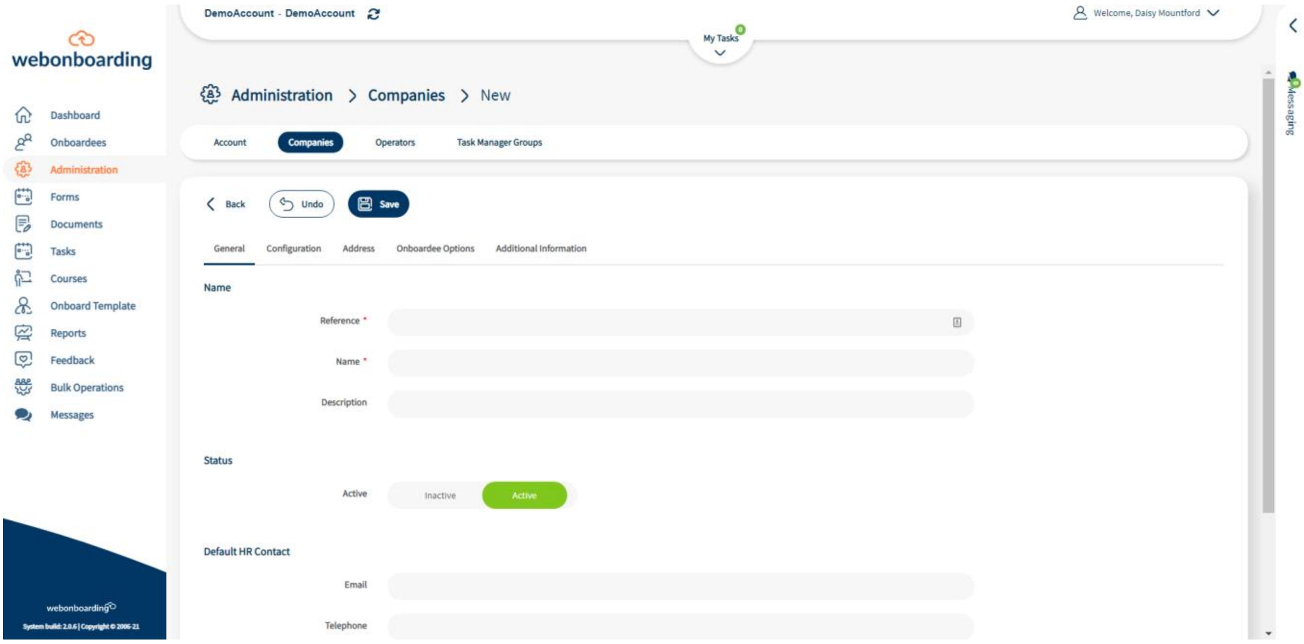
From the Menu, navigate to Administration



Click the "Companies" button from the sub menu. You will then see the "Add Company" button on the right hand side.

General

Here you will then be able to fill out the relevant information relating to the Company you are adding.



Field	Description
Reference	String value, must be unique in that Account
Name	String value, Company Name will be a merge field available across the system
Description	String value, an internal description of the Company for reference
Status	Active – Live Companies; Inactive – Obsolete Companies
Default HR Contact Email	String value, will be available to Onboardees of this Company
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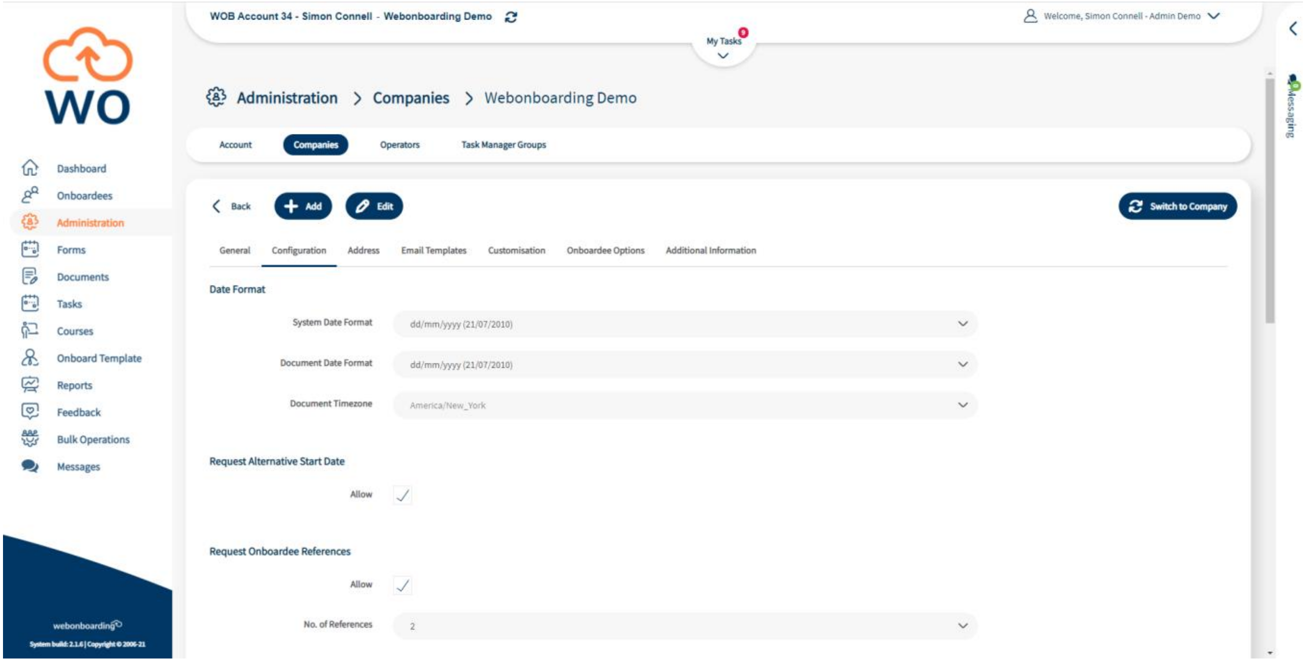
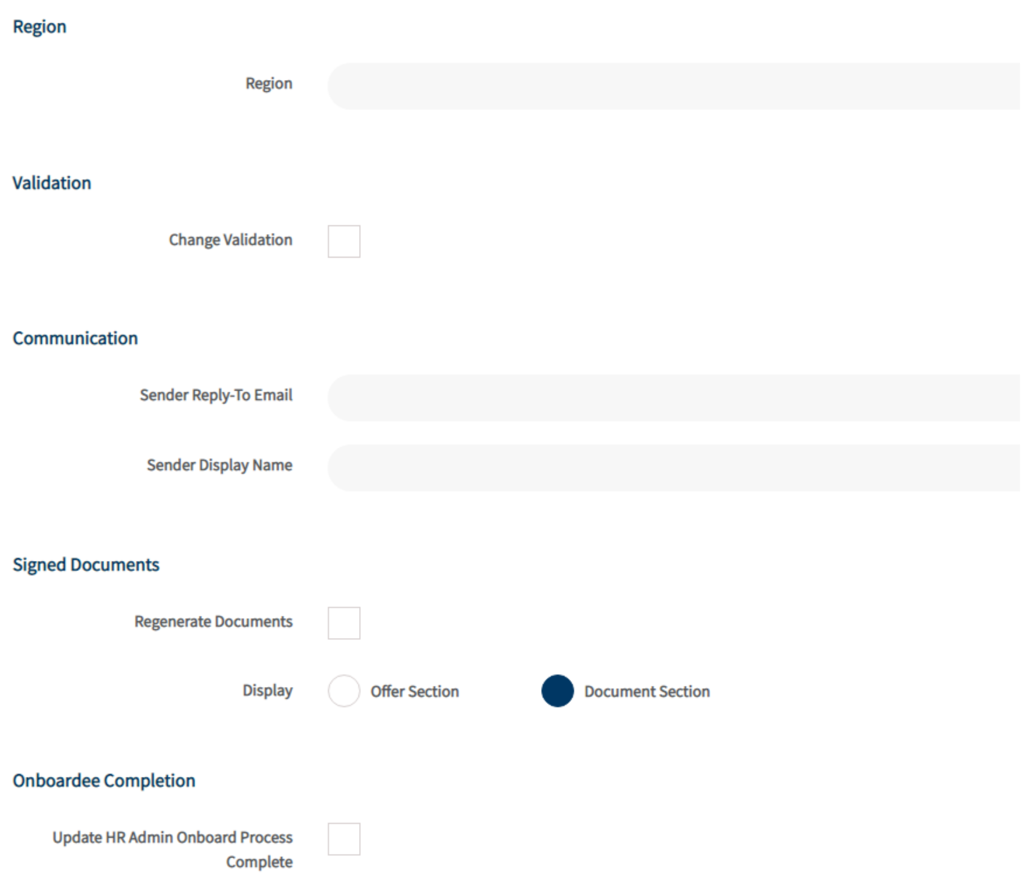
Configuration

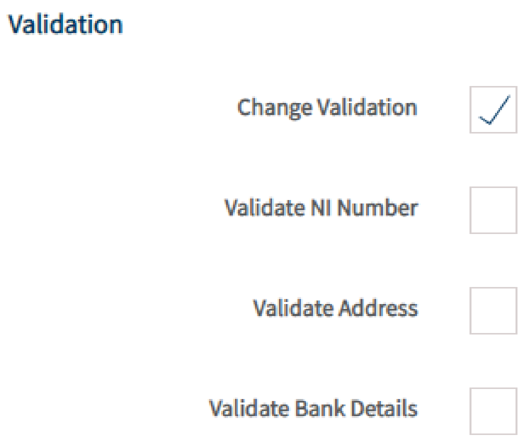
Continue to work your way across the tabs clicking “Configuration” tab next.



Field	Description
System Date Format	Drop down menu, selects date format that this Company will use inside the system
Document Date Format	Drop down menu, selects date format that this Company will use for merge fields inside Documents
Document Timezone	Drop down menu, selects timezone that this Company will use inside Documents
Request Alternative Start Date	Either enables or disables the ability for Onboardees to request alternative start dates during their onboarding process
Request Onboardee References	Either enables or disables requests for Onboardees to supply References during their process (default is on)
Number of References	When References are enabled this allows you to set the required number of References per Onboardee (default is 2)



Field	Description
Region	Drop down menu, selects regional variances for UK, US and Australia
Validation (UK only)	Tick box, when selected you can choose to validate data Onboardees enter, see details below
Sender Reply-To Email	This is the email address that replies will go to when someone responds to a system generated email
Sender Display Name	The name that displays in the From section of a system generated email
Regenerate Documents	Tick box, when selected Signed Documents and Contracts will automatically regenerate when changes are made to an Onboardee process
Display	Option to select whether additional Signing Documents appear in the Offer section or Document section for Onboardees
Onboardee Completion	Tick box, when selected the onboarding process will be marked as completed by HR when an Onboardee marks their process as completed



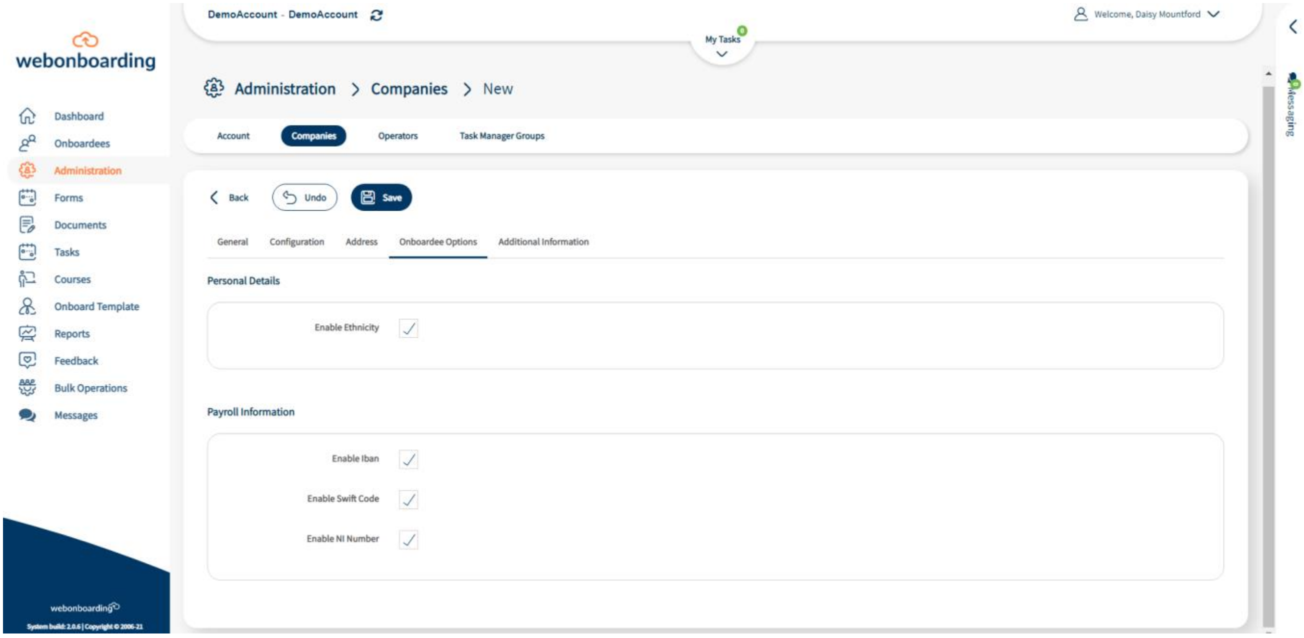
Field	Description
Validation (UK only)	Tick box, when selected you can choose to validate data Onboardees enter
- NI Number	When selected it validates that the entry matches the NI Number format
- Address	When selected it allows the Onboardee to search for their address
- Bank Details	When selected it validates the Account Number and Sort Code against the Banking Database

Address

The next tab “Address” is where you enter the address of the Company you are creating. This will be the address that is used when merging Company information into emails and documents.

Onboardee Options

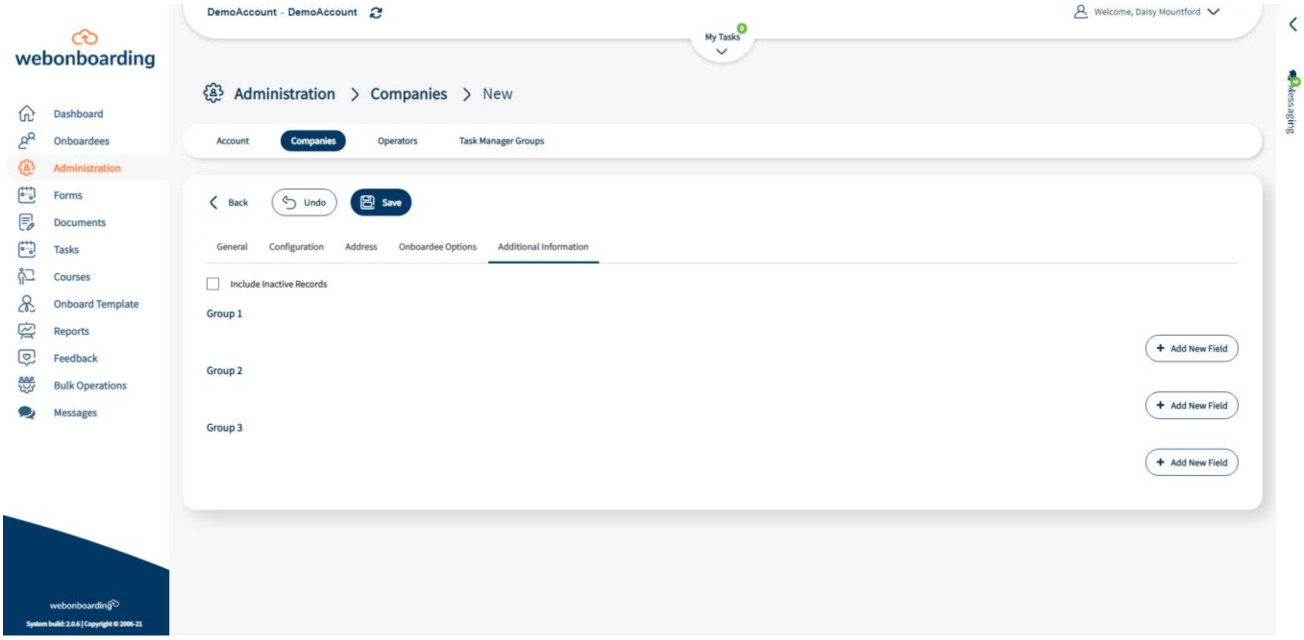
This is where you can customise the information you gather from Onboardees.



Field	Description
Enable Ethnicity	Tick box, when selected the Onboardee will be asked to supply an answer describing their ethnicity
Enable IBAN	Tick box, when selected it displays an input box for the Onboardee to enter an IBAN number
Enable Swift Code	Tick box, when selected it displays an input box for the Onboardee to enter a Swift Code
Enable NI Number	Tick box, when selected it displays an input box for the Onboardee to enter their NI Number

Additional Information

You can use this tab to add any additional fields to the onboarding process (see our additional merge field guide to see how to do this).



When completed click “Save” to save and create the Company

Once saved you will be able to access the Email Templates and Customisation options for this Company to adjust those settings and messages. Please see the separate guides for those sections.

Please note, when setting up a new company you will also need to add operators (users) to that company or you can give existing users access in the Operators section.