## Predictive Constructions

## Find/ Edit/Delete/Add Companies

This guide covers how to find, edit and delete an existing company and add a new company.

Covered Topics:

- Find a Company
- Edit a Company
- Delete a Company
- Add/Create a Company

#### **Find a Company**

 Go to the Company menu and select Find Company: Note: My Companies tab (This shows only select companies you specify as a favorite of sorts)

Pro so	edictive	SafetyN	et	
Home	Companies	Contacts	Projects	Inspections
	My Companies		1	
	Add Company			
Find	Find Company			

- 2. You may search Companies by Company Name, Contact First Name and/or Contact Last Name. To refine your search, use the Advanced tab of the search criteria.
- 3. Enter your desired search criteria and click the Green "Search" button.

Find Companies	
Basic Advanced	
Criteria 🔺 collapse	
Search Clear	
	—
Company Name	
Company Name:	
Contact First Name:	
Contact Last Name:	

Prepared/Responsible	Document No PSC-15:028	Rev A	Page 1 of 4
PSC Implementation Team			

# Predictive

## Find/ Edit/Delete/Add Companies

4. Below is an example of the types of results you should see when searching for companies:

Execut	ed new search info		Displaying 348 of 348 records				। 🚽 🚞 💎 🍲 -	↓
	Company Name:	Address	City	State:	Zipcode	Phone	Fax	
	Barney & Barney, LLC	Unknown		Unknown				
	Barr Concrete	Unknown		Unknown				
	BCC	Unknown		Unknown				
	Bears International	1411 Industrial Road, San C	San Carlos	California	94403	650-587-0101	650-551-1459	=
	Bengals Electrical	1411 Industrial Road, San C	San Carlos	California	94403	650-587-0101	650-551-1459	
	Berkel and Company Co	Unknown		Unknown				
	Bills Consolidated	1411 Industrial Road, San C	San Carlos	California	94403	650-587-0101	650-551-1459	
	Blackhawks	1411 Industrial Road, San C	San Carlos	California	94403	650-587-0101	650-551-1459	
	Blue Commerical	1411 Industrial Road, San C	San Carlos	California	94403	650-587-0101	650-551-1459	

#### **Edit a Company**

5. Click on the desired Company. NOTE: Line will be highlighted in dark green and will bold the record that the pointer is on.

Executed new search info			Displaying 348 of 348 records				। 🐈 🛅 💎 🎺 🖣	ŀ
	Company Name:	Address	City	State:	Zipcode	Phone	Fax	
	Barney & Barney, LLC	Unknown		Unknown				
	Barr Concrete	Unknown		Unknown				
	BCC	Unknown		Unknown				
	Bears International	1411 Industrial Road, San C	San Carlos	California	94403	650-587-0101	650-551-1459	=
	Bengals Electrical	1411 Industrial Roa	San Carlos	California	94403	650-587-0101	650-551-1459	
	Berket and Company Co	Unknown		Unknown				
	Bills Consolidated	1411 Industrial Road, San C	San Carlos	California	94403	650-587-0101	650-551-1459	

6. Edits to a company can include details and project associations. Click on the appropriate tab to for those edits.

	General	Details Proje	ects Inspectio	ns History	
Bengals Electrical: Details					
Save Entire Page Clear					
Name					i II
* Company Name: Bengrate Electrical					
berrgais crectricat					
Details					
Region: Begin Typing Here	Company Websit	e:			
Begin Typing Here Electrical	External Company in				
~ [remove]					- 1
-					
Prepared/Responsible	Documer	t No PS	C-15:028	Rev	Α
PSC Implementation Team					



## Find/ Edit/Delete/Add Companies

7. Make necessary changes and click on the Green "Save Entire Page" button.

		General	Details	Projects	Inspections	History
Bengals Electrical: Detai	is					
Save Entire Page Cie	tar					
Name						
* Company Name:	Bengals Electrical					
Details						
Region:	Begin Typing Here	Company Website				
Company Type:	Begin Typing Here Electrical	External Company ID				
	~ [remove]					
L						

#### **Delete a Company**

1. Follow the steps above for finding a Company. Then Check the box to the left of the Company and click the RED Delete button at the top right hand of the page.

							_	
Execut	ed new search info		Displaying 348 of 348 records				🕂 😇 🖗 🍝	↓
	Company Name:	Address	City	State:	Zipcode	Phone	Fax	
	Barney & Barney 11 C	Unknown		Unknown				
	Parr Concrete	Uakaowa		Uakaowa				
	Ban concrete	Unknown		Unknown				
	всс	Unknown		Unknown				Ξ
	Bears International	1411 Industrial Road, San C	San Carlos	California	94403	650-587-0101	650-551-1459	
	Bengals Electrical	1411 Industrial Roa	San Carlos	California	94403	650-587-0101	650-551-1459	
	Berkel and Company Co	Unknown		Unknown				

\*\*\* Important – – Deleting a Company creates significant data discrepancies. If you have two or more identical Companies do not delete them. Instead, your account administrator should use the Merge record option from the Administration menu\*\*\*

Prepared/Responsible	Document No PSC-15:028	<i>Rev.</i> - A	Page 3 of 4
PSC Implementation Team			

# Predictive M

## Find/ Edit/Delete/Add Companies

#### Create/Add a Company

1. Go to the Company menu and select Add Company.

Pro SO	edictive LUTIONS	<u>}</u>	SafetyNe	et
Home	Companies	Contacts	Projects	Inspections
	My Companies			
	Add Company			
Find (	Find Company			

2. Creating a company has 1 required field – Company Name. Enter the company information and click the Green "Save Entire Page" button.

A	dd Con	npany				
	Save Entire	e Page C	lear			
ſ	Name					
		* Company Name:				
ſ	Details					
		Region:	Begin Typing Here		Company Website:	
		Company Type:	Begin Typing Here		External Company ID:	

Prepared/Responsible	Document No PSC-15:028	<i>Rev</i> A	Page 4 of 4
PSC Implementation Team			