



To add an organisation

Adding an organisation to the database is a key part of the system, care must be taken that the information captured is accurate and that it does not duplicate existing information. This process will guide you through a method for avoiding duplication.

1. Click the Add organisation button on the tool bar this will launch the add organisation wizard.
2. Enter the post code of the organisation and the organisation name, click next
3. You will then be given a list of potential matches for the organisation you are entering
4. if any of the entries look similar then double click on the entry to bring up the full information where you can edit or amend the information
5. if the entry does not exist then click on next again to continue to add the new record.
6. Over the next few screens you will be invited to enter information about the organisation including full name, address details, number of employees, type and sector of the organisation.
7. Data at this level is shared, amongst all the organisations signed up to the database.

This process is subject to change