

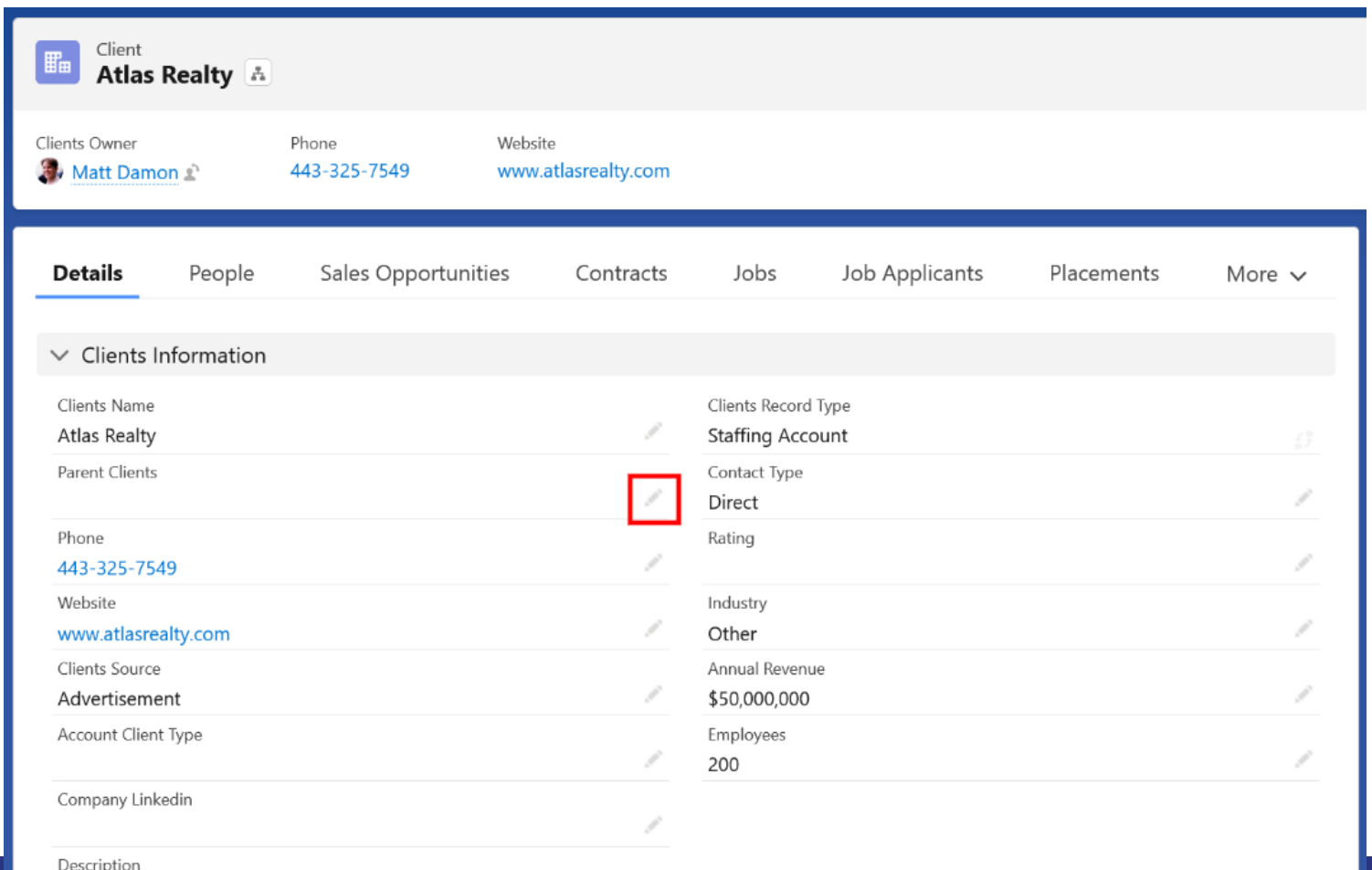
How to Build a TargetRecruit Account Hierarchy

It is not uncommon for staffing companies to have subsidiaries, divisions, and branches. The TargetRecruit account hierarchy allows accounts to be related in a hierarchy by using a 'parent account' field to link them together. Once linked, the complete hierarchy structure can be viewed, and links are provided to navigate directly to the accounts.

This feature is really useful for larger companies that deal with smaller segmentations within that larger company and want to manage and track records and data within those smaller segmentations as well as the whole company.

Setting up account hierarchy in TargetRecruit is easy.

On any Account/Client's detail page, click the Edit icon next to the Parent field.



The screenshot shows the client detail page for Atlas Realty. The 'Parent Clients' field is highlighted with a red box, and the edit icon next to it is also highlighted. The page includes a navigation menu with tabs for Details, People, Sales Opportunities, Contracts, Jobs, Job Applicants, Placements, and More. The 'Clients Information' section is expanded, showing various fields and their values.

Field	Value	Edit Icon
Clients Name	Atlas Realty	✎
Parent Clients		✎
Phone	443-325-7549	✎
Website	www.atlasrealty.com	✎
Clients Source	Advertisement	✎
Account Client Type		✎
Company LinkedIn		✎
Description		✎
Clients Record Type	Staffing Account	✎
Contact Type	Direct	✎
Rating		✎
Industry	Other	✎
Annual Revenue	\$50,000,000	✎
Employees	200	✎

The Edit pane displays with a search box for the Parent field. Search for and select the parent Account for this Account record and click Save.

Client
Atlas Realty

Clients Owner: **Matt Damon** | Phone: 443-325-7549 | Website: www.atlasrealty.com

Details | People | Sales Opportunities | Contracts | Jobs | Job Applicants | Placements | More

▼ Clients Information

* Clients Name: Atlas Realty | Clients Record Type: Staffing Account

Parent Clients: Search Clients... (highlighted)

Recent Clients: Atlas Realty, Mountview Partners, Amazon DFW Warehouse, Advanced Medical Staffing, CarGurus, New Client

Contact Type: Direct | Rating: --None-- | * Industry: Other

Annual Revenue: \$50,000,000 | Employees: 200

Cancel | Save (highlighted)

To view where your Account now falls in the hierarchy, click the Hierarchy icon next to the Account/Client's name.

Client
Atlas Realty (Hierarchy icon highlighted)

Clients Owner: **Matt Damon** | Phone: 443-325-7549 | Website: www.atlasrealty.com

Details | People | Sales Opportunities | Contracts | Jobs | Job Applicants | Placements | More

▼ Clients Information

Clients Name	Atlas Realty	Clients Record Type	Staffing Account
Parent Clients	Mountview Partners	Contact Type	Direct
Phone	443-325-7549	Rating	
Website	www.atlasrealty.com	Industry	Other
Clients Source	Advertisement	Annual Revenue	\$50,000,000
Account Client Type		Employees	200
Company LinkedIn			

Description: We would like to welcome you to our comprehensive Northeast PA real estate website. No other site provides more detailed real estate market information than you'll find here.

You can see where your Account lies in the hierarchy with the Current tag. You can also see what relationships the other Accounts in the hierarchy have to your organization, if any.

CLIENT > ATLAS REALTY					
Client Hierarchy					
CLIENTS NAME	CLIENTS SITE	BILLING STATE/PROVINCE	PHONE	TYPE	CLIENTS OWNER ALIAS
▼ Mountview Partners	www.mountviewpartners.com	MD	(615) 266-1889	Prospect	ltpart
Atlas Realty current		Maryland	443-325-7549	Customer	trpart

That's it! Creating TargetRecruit Account Hierarchies really is that simple and it's a great way to organize accounts within the platform.

If you're an existing TargetRecruit client and have questions, please reach out directly to your account rep – we're here to help!

Not a current TargetRecruit user, but maybe you'd like to learn more?

Contact us at
sales@targetrecruit.com