Efficience
DESIGNED AND DEVELOPED BY THE KEY

Tutorial

Create a Business Relation

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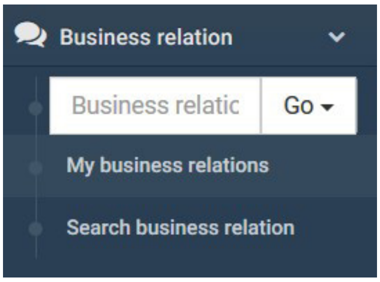
Create a Business Relation

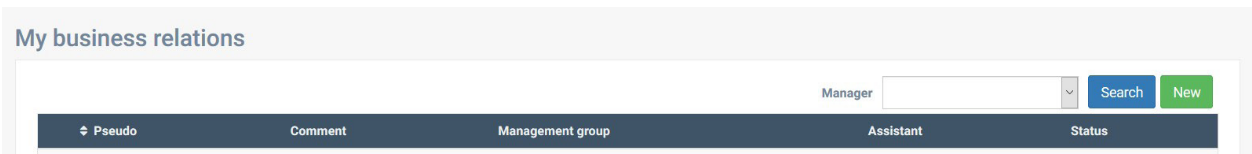
To create a client card or even a portfolio, you will always have to create first a Business Relation. In Efficience, a Business Relation is the same as a folder. This is the main element in the hierarchy where all client(s) and portfolio(s) are linked and classified together. It allows to easily find information related to multiple clients or portfolios.

To create a new Business Relation

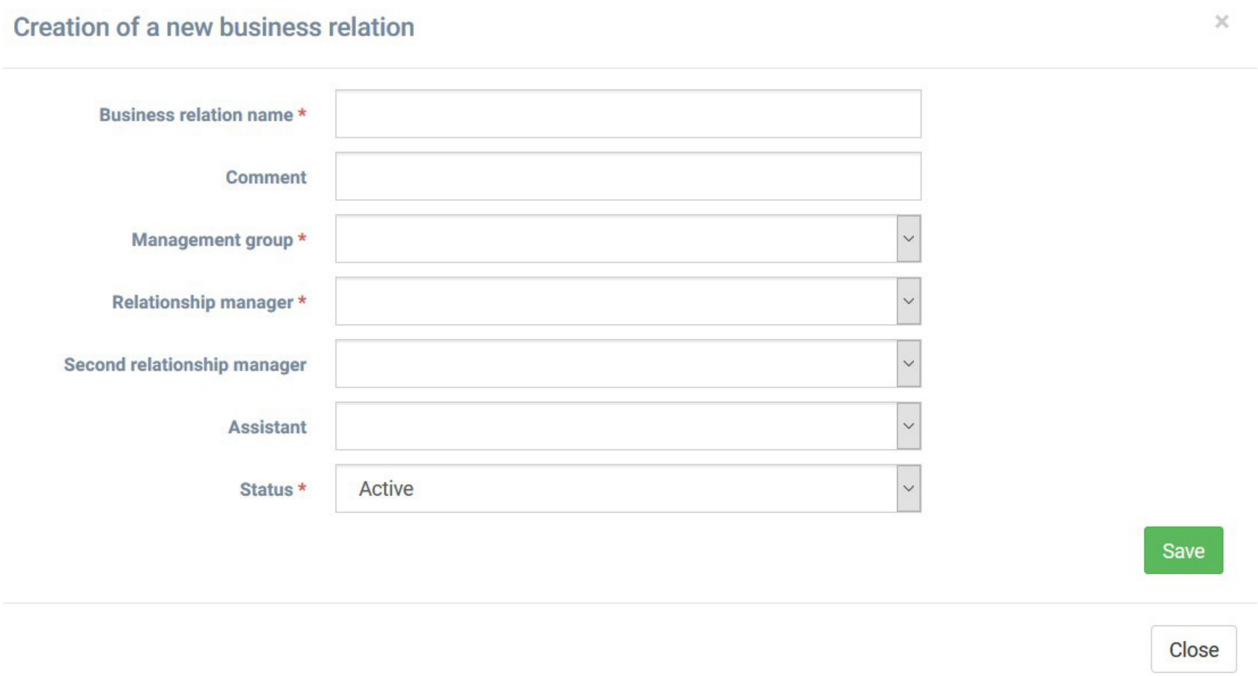
1. On the left menu, click on "Business Relation".
2. Click either on "My Business Relations" or on "Search Business Relation".



3. Click on the "New" button, which is on the top right of the list.



4. Fill in the required fields of the form and click on “Save”.



The new relation is now visible.