To add items to any of the categories select it from the Administration / Organisation Chart list e.g. Division:

1. Use the Filters or Search Box to find items.

2. Click ✏ to edit or 🗑 to delete any items.

3. Click **+ADD NEW** to create a new item.

4. Type in a title.

5. Click 💾 **SAVE**.

To view the chart navigate to **Administration / Organisation Chart / Chart.**

Your Company Name will be displayed at the top.
To start building your chart right click on the box:

1. Select +ADD.

2. Select the type of item to add.

3. Choose from the list.

4. Click **SAVE**.

This will add an item below the one you have selected.

To add items on the same level you will need to click on the level above e.g. if you want to add another country right click on SMDemo and select add country.
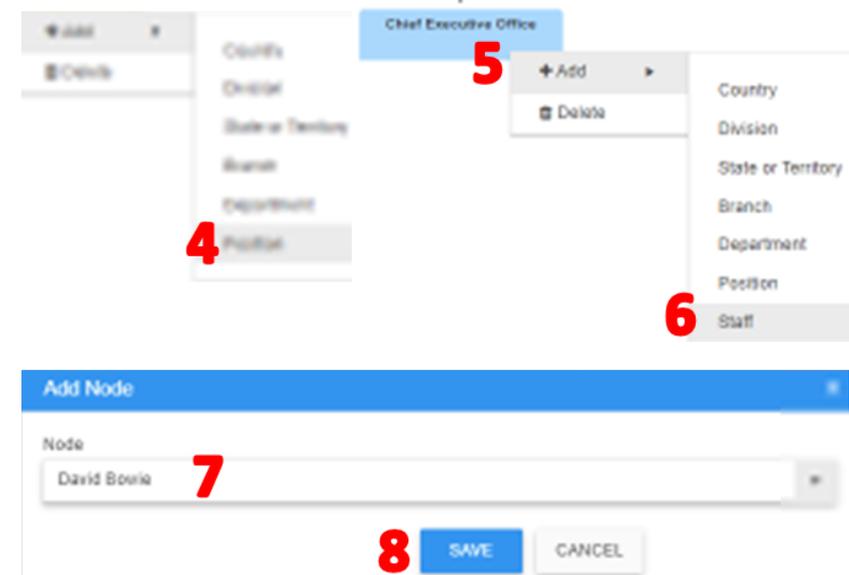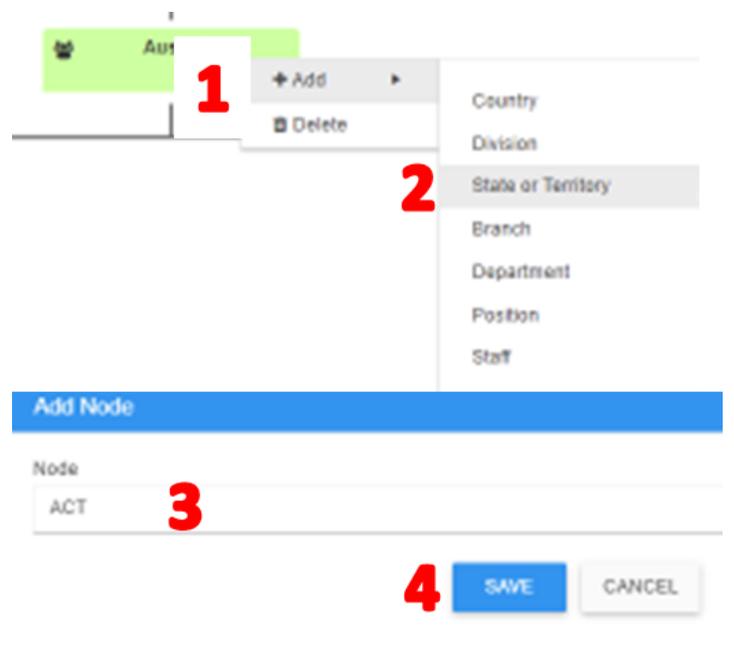
To add staff

5. First click +Add & select Position.

6. Click on the Position added & select Staff

7. Choose from the list of staff.

8. Click **SAVE**.

You can also collapse and expand sections of the chart by hovering over the field and clicking the green arrows on the four sides.
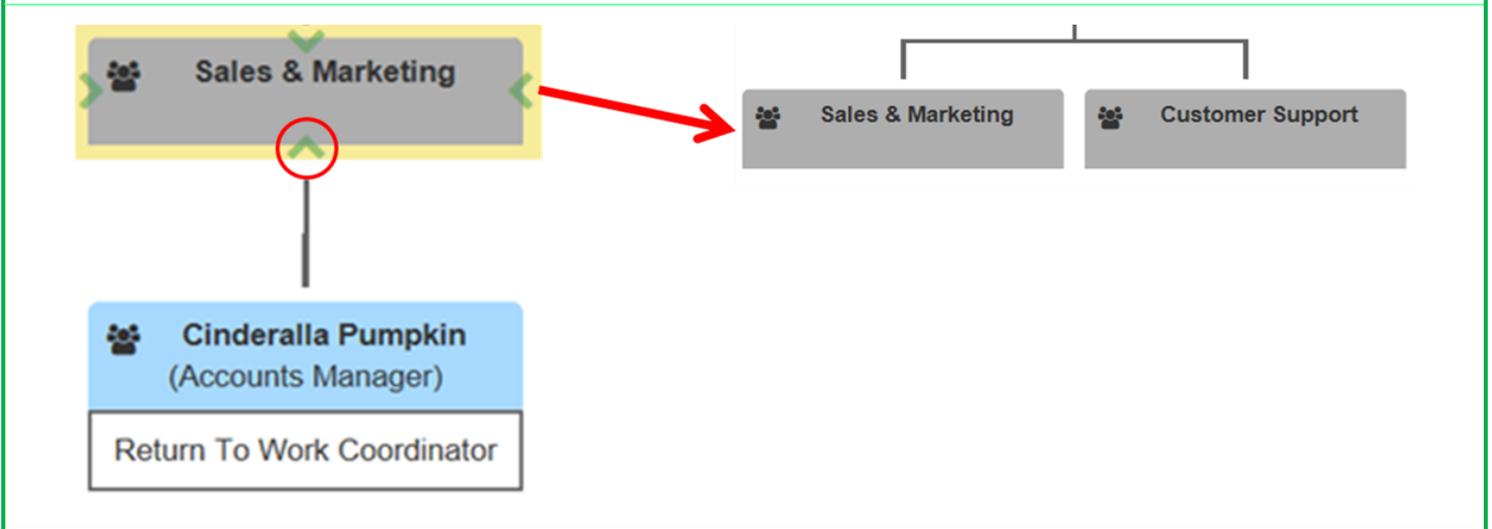
The inward facing arrows mean you can collapse data above, below or from left and right.

The outward facing arrows mean you can expand data, below, left or right.

In the example below we clicked the bottom arrow which collapsed the Sales & Marketing Department. You can make them reappear by clicking the arrow again.

NOTES:

- You can also export your Organisation Chart to a PDF for printing by clicking on the Export button top right side of the screen.
- You can use the scroll button on your mouse to zoom in or out on the chart. Use the Refresh Button to reset.