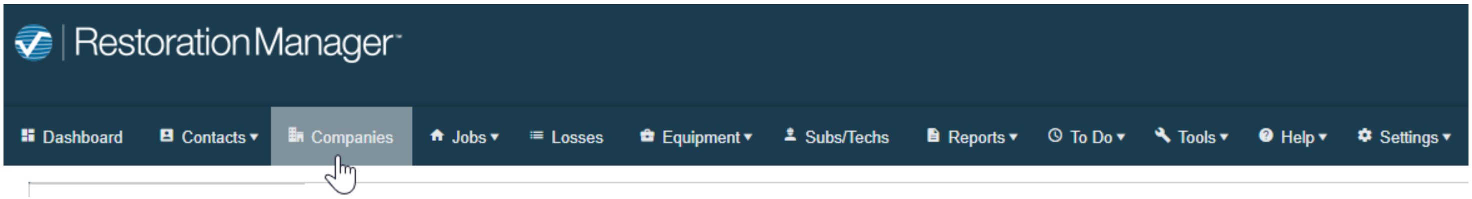
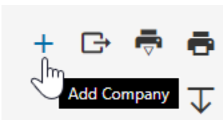
Companies – How to Add

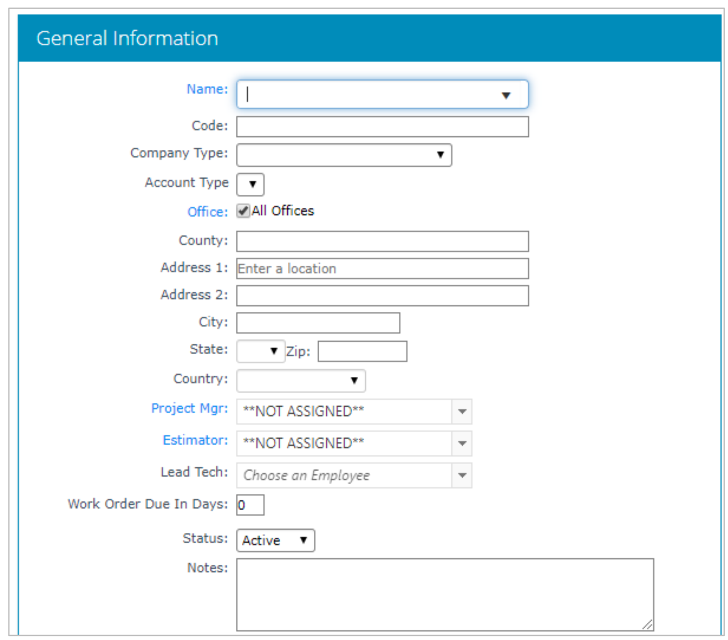
To add a new Company single click on Companies in the toolbar.



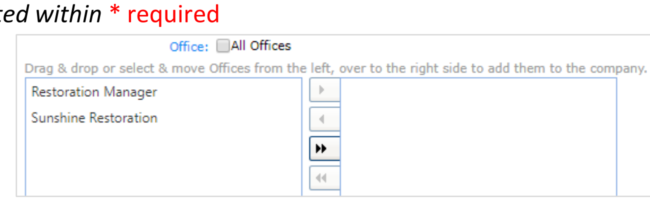
Click the + Add Company icon located at the top right of the page.



Within the **Company Detail page,** add the following (if applicable):



1. **Name:** *The name of the Company * required*
   Name field is an intuitive search begin to type the Company you would like to enter. If the Company isn't displaying, then continue to add the full Company name.
2. **Code**: *Optional, Code is a searchable field within the Companies page. This field also prints on the Company Correspondence Summary, Company Correspondence Detail and the Sales Activity Reports.*
3. **Company Type:** *Select the Company Type from the drop down (if applicable). Company Type is a searchable field within the Companies Page and Company Contact Page (Contacts → Company Contacts).*
   Note: *The Administrator of the application can add Company Types by going to Settings → System Setup → Settings → Company Settings, Company Types.*
4. **Account Type:** *Select the Account Type from the drop down, this is an optional unless it is set to required by the Administrator.*
   Note: *The Administrator of the application can add Account Types by going to Settings→ System Setup→ Settings→ Company Settings, Company Account Types.*
5. **Office:** *Select the Office (Location/Division) the Company is associated within* * required
   Note: *All Offices is checked by default, uncheck it to display the multiple Offices (Locations/Divisions) make the selection which Offices (Locations/Divisions) the new Company record is associated with.*



6. **County:** *Optional, Add the County where the Company is located.*
7. **Address 1:** *Add the Address where the Company is located.*
8. **Address 2:** *Optional, Address continued.*
9. **City, State,** and **Zip:** *Apply the City, State, and Zip where the Company is located.*
10. **Country:** *Select the Country from the drop-down menu (if applicable).*
11. **Project Mgr & Estimator:** * required *fields.*
    Recommendation: *Add the **NOT ASSIGNED** record, when a lead/job is added these fields can be changed to the assigned employee.*
12. **Work Order Due In Days:** *optional, recommendation keep at zero (0)*
13. **Status:** *Active or Inactive*
14. **Notes:** *Apply additional Company details/information (if applicable)*

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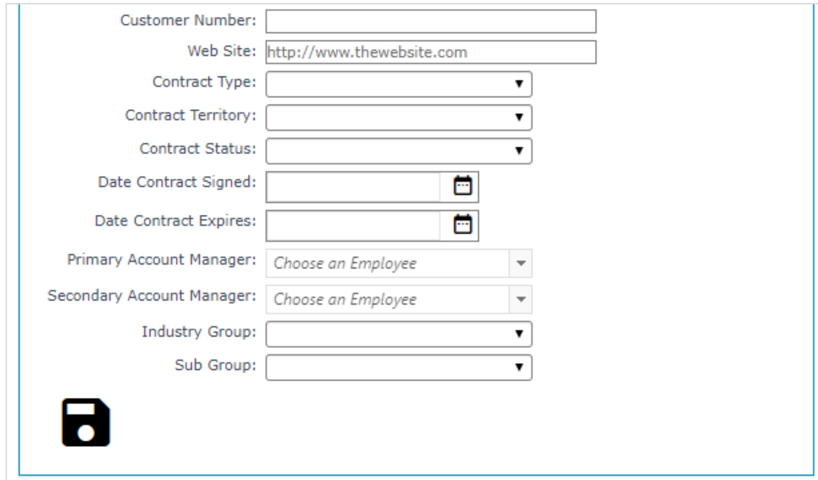

15. **Customer Number:** *Apply the Customer Number associated with the Company record (if applicable).*
16. **Web Site:** *Apply the Website of the Company.*
17. **Contract Type:** *Select the Contract Type from the drop down (if applicable). Contract Type is searchable within the Companies Page.*
    Note: *The Administrator of the application can add the Contract Types by going to Settings→ System Setup→ Settings→ Second Column→ Company Settings, Company Contract Types.*
18. **Contract Territory:** *Select the Contract Territory from the drop down (if applicable).*
    Note: *The Administrator of the application can add the Contract Territory by going to Help/Tools→ Tools→ System Setup→ Settings→ Second Column→ Company Settings, Territories.*
19. **Contract Status:** *Select the Contract Status from the drop down (if applicable). Contact Status is searchable within the Companies Page.*
    Note: *The Administrator of the application can add the Contract Status by going to Settings→ System Setup→ Settings→ Company Settings, Company Contract Status.*
20. **Date Contract Signed:** *Apply the date the Contract was signed (if applicable).*
21. **Date Contract Expires:** *Apply the date the Contract will expire (if applicable). Contract Expires Date is searchable within the Companies Page.*
22. **Primary Account Manager:** *Apply the Primary Account Manager from the drop down (if applicable). Primary Account Manager is searchable within the Companies Page.*
23. **Secondary Account Manager:** *Apply the Secondary Account Manager from the drop down (if applicable).*
24. **Industry & Sub Group:** *Apply the Industry & Sub Group from the drop down (if applicable). These two fields are searchable within the Companies Page.*
    Note: *The Administrator of the application can add the Industry Group & Subs by going to Settings→ System Setup→ Settings→ Company Settings, Industry Groups*

Once you are finished setting up the Company record click the **Save** icon (floppy disc) located at the bottom left of the page.