How do I … create a company record?

In this tutorial I will show you how to create a new company record. If you haven't already, you might like to watch the tutorial, "Getting started with companies and clients" as this will give you an understanding of the layout of the company record.

So let's begin by clicking the 'New Company' button on the main menu.

Firstly you are prompted to enter the name of the company.

Next you can start to fill out the information such as the contact details in the panel at the top. You can either add the details manually or a good tip is to enter the web address first and then click the blue website button. This will open the website in the browser on a tab within the record, making it easy to highlight information such as the phone number and drag it into position.

You can then fill in the other information such as sector, segments and if you click the blue skills button by the address, you can right-click and add skills to the record. This may be desirable if you wish to search for companies in order to send out a mailshot and adding skills may make finding the companies easier in the future.

Next you can fill in the remaining information on the company such as the VAT number and so on. Over on the right you will see a button marked 'Accounts'. If you create a client record for the person who deal with in the accounts department at the company, you can then drag their name from the tree on the left or the clients panel on the right to this field and when you click the 'Accounts' button, their contact details will be displayed.

Once you have finished entering the basic details for the company, you might like to add some text to the 'About' panel. You can either type free text in or paste in text from the company's website or a document. If you right click, you can add a time and date stamp to anything that you add.

Next you might like to move on to the addresses tab and enter any additional addresses for this company. To add one, click the new button and enter the address, then click 'Ok'.

Finally if there are any documents that you might like to add to the company at this stage, click the 'Attachments' tab. Then right-click to browse for files.

In terms of creating the company record, this is now all done. Of course you might like to add clients to the company. This is covered in the tutorial 'How do I … create a client record'. For now, if you have finished adding information to the company record you should close the record to save the changes.