

This guide covers how to find, edit and delete an existing company and add a new company.

Covered Topics:

- Find a Company
- Edit a Company
- Delete a Company
- Add/Create a Company

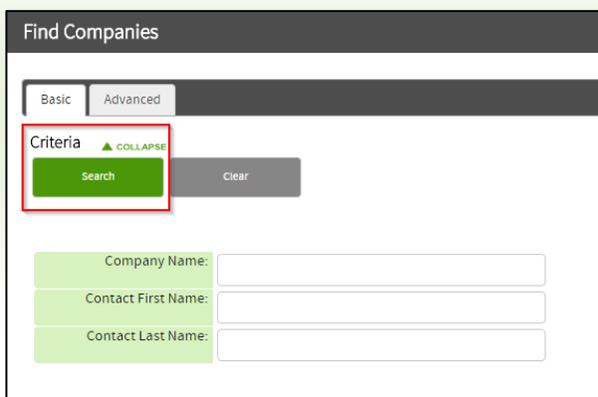
Find a Company

1. Go to the Company menu and select Find Company:

Note: My Companies tab (This shows only select companies you specify as a favorite of sorts)



2. You may search Companies by Company Name, Contact First Name and/or Contact Last Name. To refine your search, use the Advanced tab of the search criteria.
3. Enter your desired search criteria and click the Green “Search” button.



4. Below is an example of the types of results you should see when searching for companies:

Executed new search info Displaying 348 of 348 records

	Company Name:	Address	City	State:	Zipcode	Phone	Fax
<input type="checkbox"/>	Barney & Barney, LLC	Unknown		Unknown			
<input type="checkbox"/>	Barr Concrete	Unknown		Unknown			
<input type="checkbox"/>	BCC	Unknown		Unknown			
<input type="checkbox"/>	Bears International	1411 Industrial Road, San C...	San Carlos	California	94403	650-507-0101	650-551-1459
<input type="checkbox"/>	Bengals Electrical	1411 Industrial Road, San C...	San Carlos	California	94403	650-507-0101	650-551-1459
<input type="checkbox"/>	Berkel and Company Co...	Unknown		Unknown			
<input type="checkbox"/>	Bills Consolidated	1411 Industrial Road, San C...	San Carlos	California	94403	650-507-0101	650-551-1459
<input type="checkbox"/>	Blackhawks	1411 Industrial Road, San C...	San Carlos	California	94403	650-507-0101	650-551-1459
<input type="checkbox"/>	Blue Commerical	1411 Industrial Road, San C...	San Carlos	California	94403	650-507-0101	650-551-1459

Edit a Company

5. Click on the desired Company. NOTE: Line will be highlighted in dark green and will bold the record that the pointer is on.

Executed new search info Displaying 348 of 348 records

	Company Name:	Address	City	State:	Zipcode	Phone	Fax
<input type="checkbox"/>	Barney & Barney, LLC	Unknown		Unknown			
<input type="checkbox"/>	Barr Concrete	Unknown		Unknown			
<input type="checkbox"/>	BCC	Unknown		Unknown			
<input type="checkbox"/>	Bears International	1411 Industrial Road, San C...	San Carlos	California	94403	650-507-0101	650-551-1459
<input checked="" type="checkbox"/>	Bengals Electrical	1411 Industrial Roa...	San Carlos	California	94403	650-587-0101	650-551-1459
<input type="checkbox"/>	Berkel and Company Co...	Unknown		Unknown			
<input type="checkbox"/>	Bills Consolidated	1411 Industrial Road, San C...	San Carlos	California	94403	650-507-0101	650-551-1459

6. Edits to a company can include details and project associations. Click on the appropriate tab for those edits.

Bengals Electrical: Details

Save Entire Page Clear

Name

* Company Name:

Details

Region:

Company Website:

Company Type:

External Company ID:

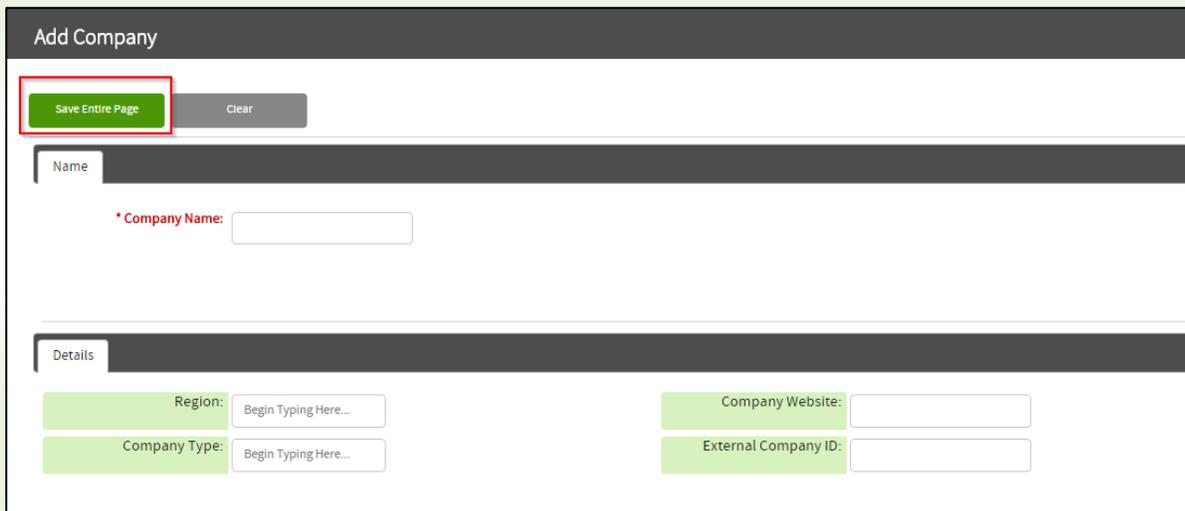
Electrical [remove]

Create/Add a Company

1. Go to the Company menu and select Add Company.



2. Creating a company has 1 required field – Company Name. Enter the company information and click the Green “Save Entire Page” button.



Add Company

Name

* Company Name:

Details

Region:

Company Type:

Company Website:

External Company ID: