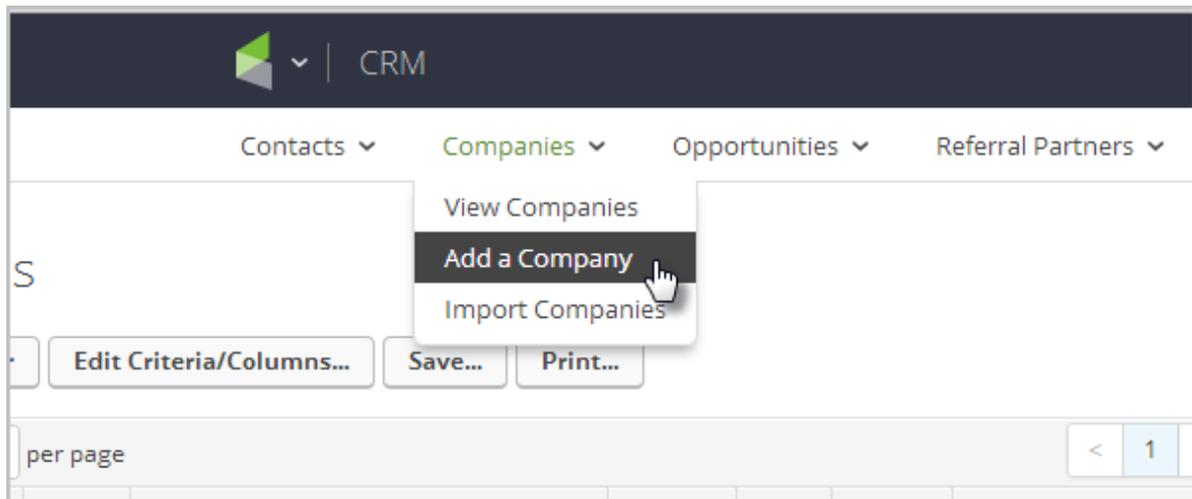


Create a company record

To Create a Company Record

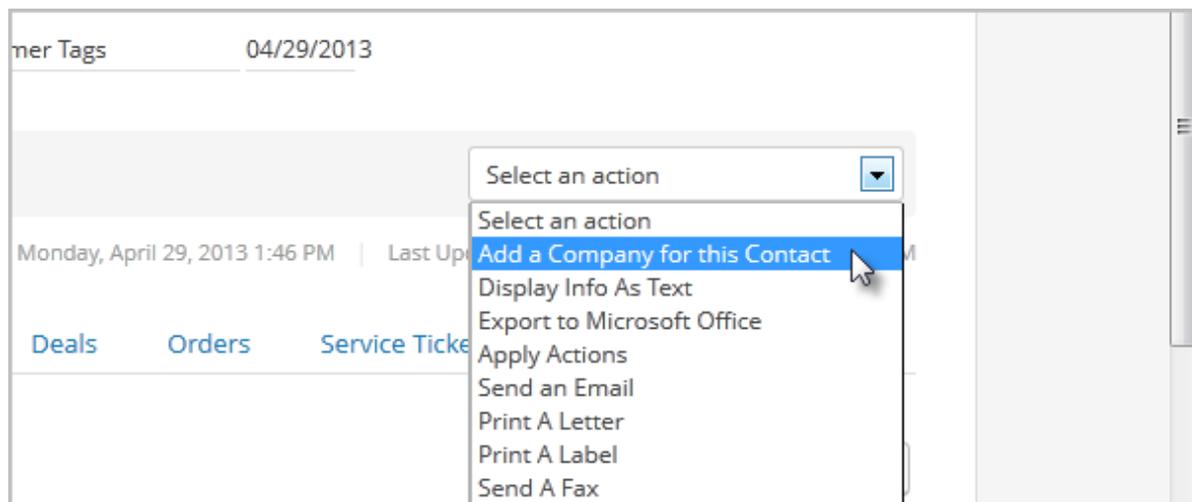
1. Go to CRM > Companies in the master nav.
2. Select **Add a Company** from the company menu.



3. Enter the Company Information.
4. Click on the **Save and Add a Contact to this Company** button. Note: You must link at least one person to the company.
5. Enter the contact information.
6. Click the **Save & View** button of your choice, or click on **Save and Add a Contact to this Company** button to enter another contact.

To Create a Company from an Existing Contact Record

1. Open the contact record
2. Click on the contact actions drop-down and select **Add a Company for this Contact**.



3. Add to or edit the information in the company record.
 4. Click the **Save** button to save the new company record.
 5. (Optional) Click on the **Contacts** tab in the top row to link more people to this company.
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