Create a company record s

To Create a Company Record

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

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- 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.

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		Select an action	T	
Monday, Apr	il 29, 2013 1:46 PM	Select an action Last Up: Add a Company for this Contact		1
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		Print A Label Send A Fax		

- 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.