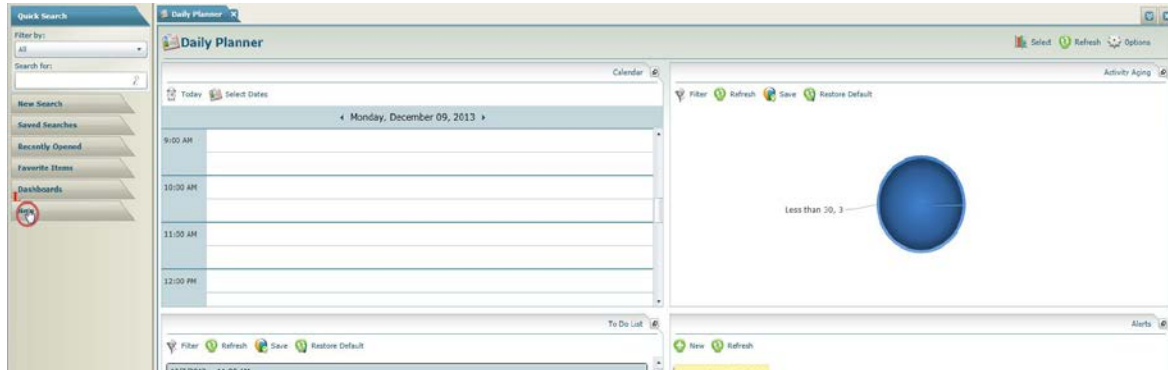
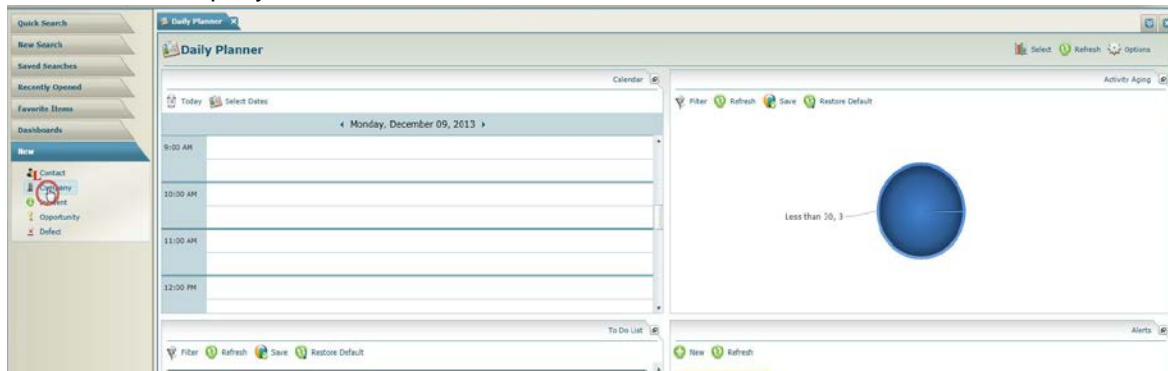


Add a New Company

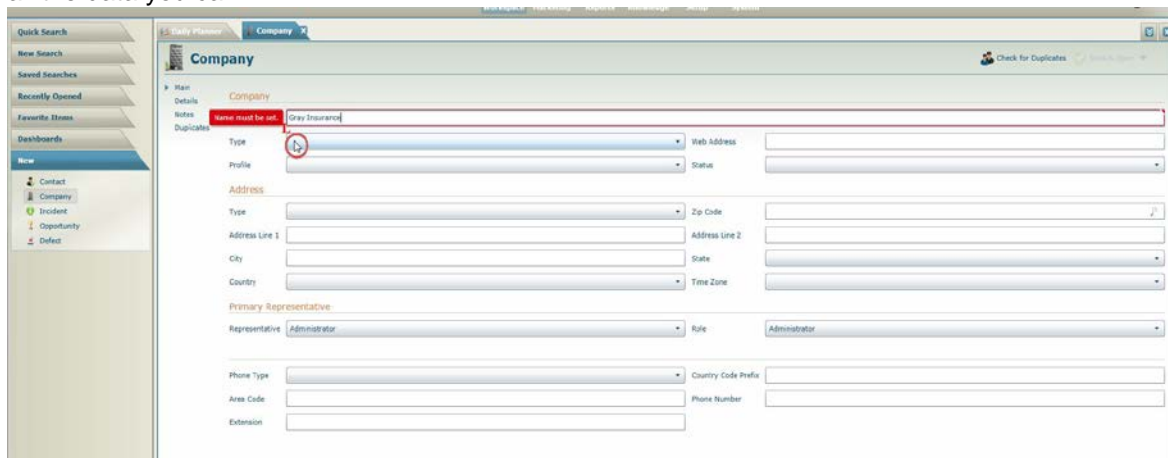
1. Left Click New.



2. Left Click Company.



3. Type the Company Name. This is the only required field...however, it's a good practice to enter all the data you can.



Add a New Company

4. When you enter the address, it's best to search for and select the zip code. When you do, the city and state will be populated for you. This method prevents typos, etc. Click the zoom button.

The screenshot shows the 'Company' form with the following details:

- Name:** Gray Insurance
- Type:** Active Customer
- Profile:** Insurance
- Address Type:** Business
- Address Line 1:** 123 Main Street
- City:** Allerton
- Zip Code:** (Empty field with a red circle and zoom button next to it)
- Primary Representative:** Administrator

5. Search for the zip code. You can type the city name or a zip code number.

The 'Search for Zip' dialog box is open with the following search criteria:

- Search in:** All
- Search For:** Allerton

The search results table is as follows:

Zip Code	City	County	Country	State	Time Zone
48002	ALLENTON	SANIT CLAIR	UNITED STATES	MICHIGAN	Eastern Standard
53002	ALLENTON	WASHINGTON	UNITED STATES	WISCONSIN	Central Standard
63025	ALLENTON	SANIT LOUIS	UNITED STATES	MISSOURI	Central Standard

6. Left Click Search.

The 'Search for Zip' dialog box is open with the following search criteria:

- Search in:** All
- Search For:** Allerton

The search results table is as follows:

Zip Code	City	County	Country	State	Time Zone
48002	ALLENTON	SANIT CLAIR	UNITED STATES	MICHIGAN	Eastern Standard
53002	ALLENTON	WASHINGTON	UNITED STATES	WISCONSIN	Central Standard
63025	ALLENTON	SANIT LOUIS	UNITED STATES	MISSOURI	Central Standard

7. Select the correct zip code from the list.

The 'Search for Zip' dialog box is open with the following search criteria:

- Search in:** All
- Search For:** Allerton

The search results table is as follows:

Zip Code	City	County	Country	State	Time Zone
48002	ALLENTON	SANIT CLAIR	UNITED STATES	MICHIGAN	Eastern Standard
53002	ALLENTON	WASHINGTON	UNITED STATES	WISCONSIN	Central Standard
63025	ALLENTON	SANIT LOUIS	UNITED STATES	MISSOURI	Central Standard

Add a New Company

8. Notice that the city and state are now filled in correctly.

The screenshot shows the 'Company' form with the following data entered:

- Name: Gray Insurance
- Type: Active Customer
- Profile: Insurance
- Address Type: Business
- Address Line 1: 123 Main Street
- City: ALLENTON
- Country: UNITED STATES
- State: WISCONSIN
- Time Zone: Central Standard
- Primary Representative: Administrator
- Role: Administrator
- Phone Type: (highlighted with a red circle)
- Area Code: (empty)
- Extension: (empty)
- Zip Code: 53002
- Web Address: (empty)
- Status: (empty)
- Country Code Prefix: (empty)
- Phone Number: (empty)

9. When you have entered all the data, it's good practice to check for possible duplicate records.

The screenshot shows the 'Company' form with the 'Check for Duplicates' button highlighted by a red circle. The form data is the same as in the previous screenshot.

10. Click OK.

The screenshot shows the 'Company' form with a 'Possible Duplicates' dialog box open. The dialog box contains the text 'No duplicates were found.' and has an 'OK' button highlighted with a red circle.

11. Left Click Save.

The screenshot shows the 'Company' form with the 'Save & Open' button highlighted by a red circle. The form data is the same as in the previous screenshots.

Add a New Company

12. Your Company record is now saved. You can add Contacts, Activities or other records if needed.

The screenshot displays a CRM software interface for a company record. The main window is titled "Gray Insurance" and contains the following fields:

- Name: Gray Insurance
- Type: Active Customer
- Status: Active
- Profile: Insurance
- Role: Administrator
- Address: 123 Main Street, ALLINGTON, VT 53002
- Phone: (414) 223-4567 Business Main
- Territories: Click to add Company Territory

Below the form is an "Activities" section with a table header: Date, Time, Description, Result, Representative, Contact. The table is currently empty, with a "Click here to add Activity" link at the bottom.

On the left side, there is a navigation menu with options: Contact, Company, Incident, Opportunity, Defect. The "New" button is highlighted.