How to add a New Company Record

To add a new company: Open the company selector by clicking on the Companies icon.

Click on the New button. A screen similar to the following one is displayed.



Click on the + button to expand a section and enter the company's details.

Keyboard shortcuts

Key	Use
Tab or Return	Moves you through the questions, expanding each level
Up & down arrows	Moves you through the question without expanding levels
Left & right arrows	Collapses or expands a level, unless it is a text field
Space bar	Ticks or clears a box
Ctrl & character	In a long list this takes you to the next word that starts with that character

The information that you are asked for depends on what has been requested by your company. There will be some fields which must be entered. When you have input the information against all the relevant and necessary fields, click on next.

The next screen requires you to enter the first contact person's details, again the information you are asked for depends on what has been requested by your agency.

When you have entered all the information click on the Finish button.

This will open the created Company Record.



To add further contacts to the Company Record, click on the Add button and enter the required information in the top right section and save & refresh.

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