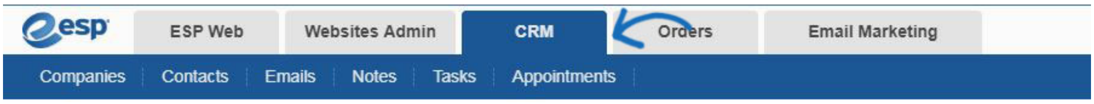
Product Support > CRM > Adding a New Company in CRM

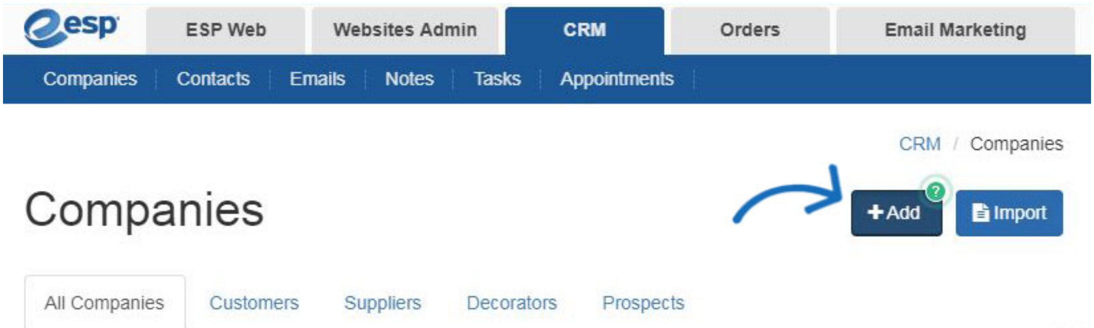
Adding a New Company in CRM

Wendy D - 2019-07-08 - CRM

To add a new company, log into www.SearchESP.com and then click on the CRM tab.

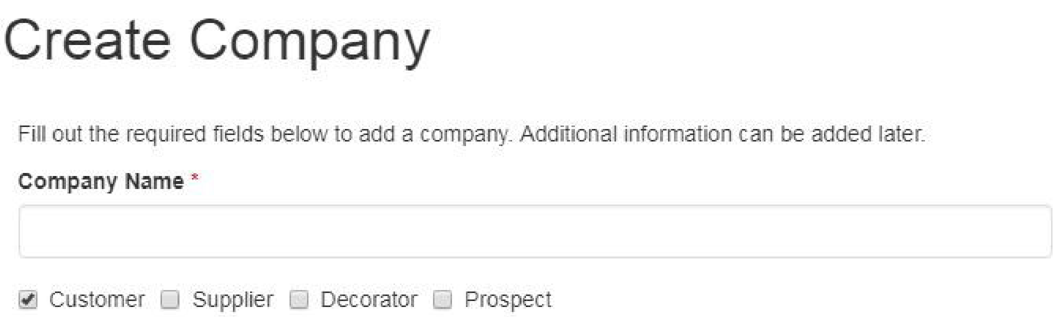


Next, click on the Companies tab.



Click on the Add button to add a new company. Enter the company name and sue the checkboxes to select the type of company, for example, customer.

Fill in as much information as possible about the company.

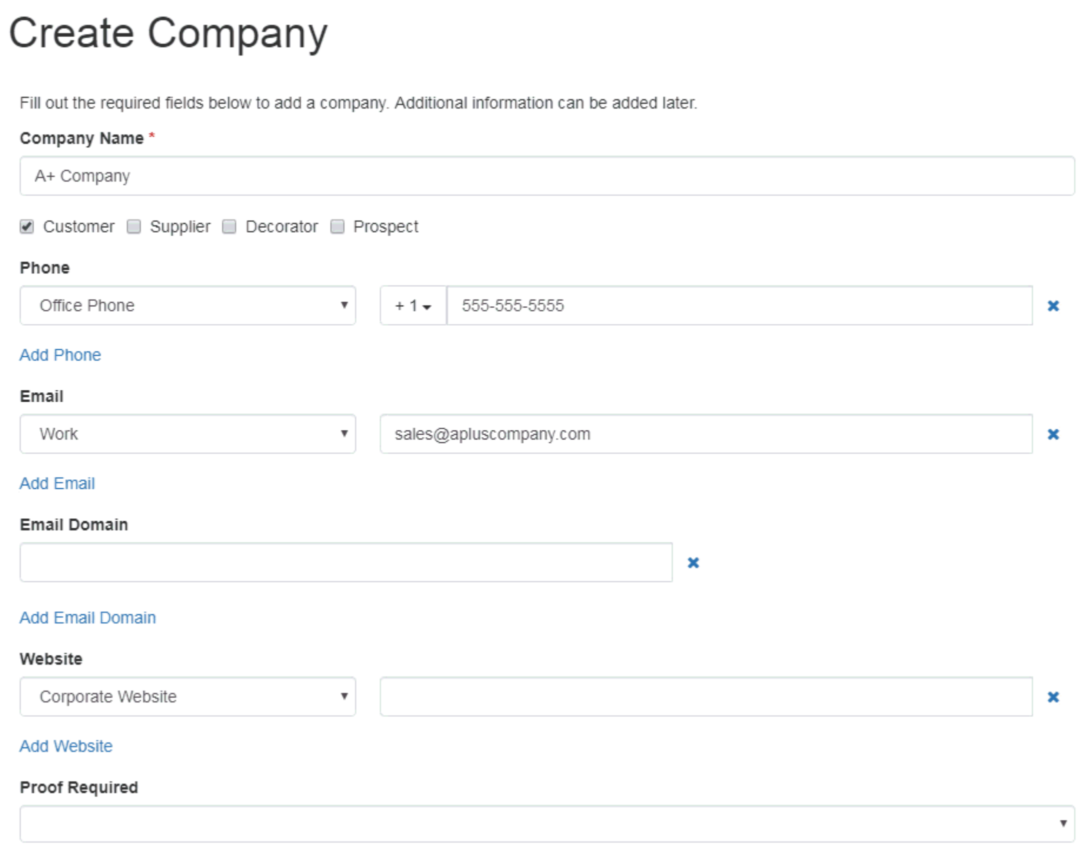


Enter a phone number and email by selecting its type from the dropdown and then entering the information to the right. To enter a fax number, use the dropdown to select "Office Fax" or "Order Fax" in the phone sections.

If you need to add a second phone number or an additional email, click on the "Add" link beneath the field.

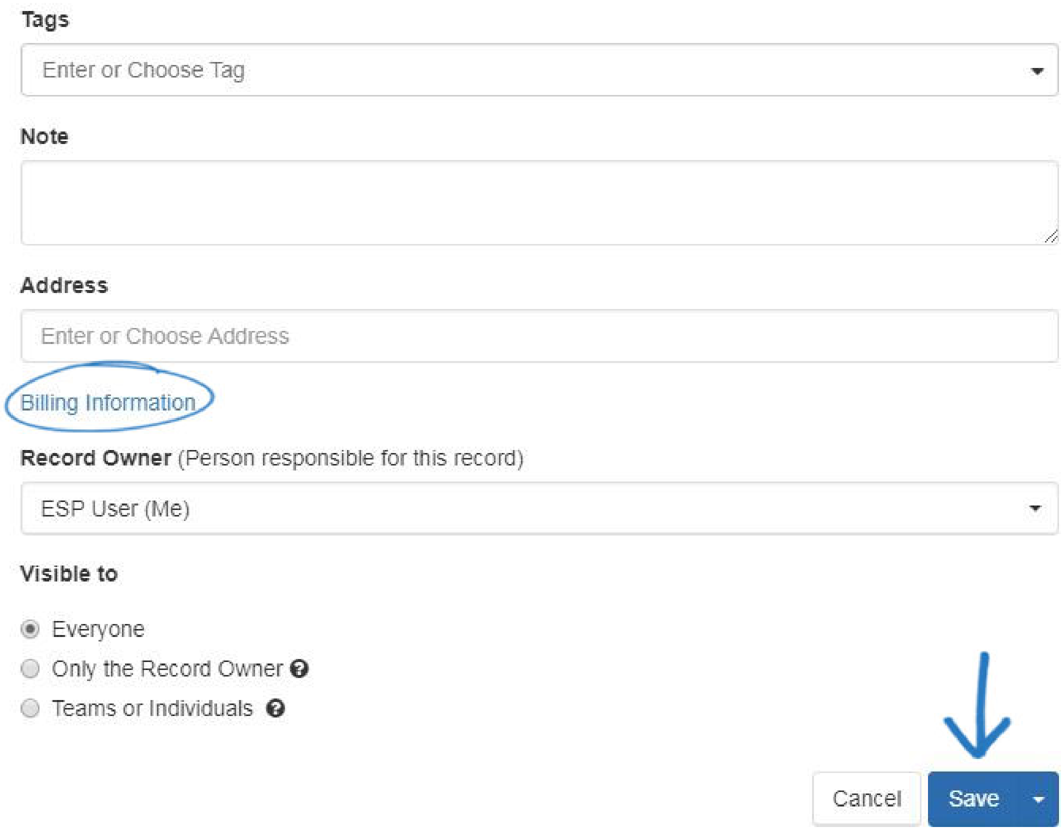
To establish a default proof required preference, use the Proof Required dropdown to select from None, Email, Digital Photo, or Pre-Production. If email is selected, a field will open with the option to enter an email address for proofs. This information will then automatically display in the Decoration tab when creating an order.

Click on the Billing Information link to add Pay With information, a sales tax code and a shipping account. If the company is Tax Exempt, open the Billing section and check the Tax Exempt box.



Lastly, you can select to make this company visible to:

- Everyone: All users within your organization.
- Only the Record Creator: Only you will be able to view and search for this company.
- Teams or Individuals: You select the team of users or individual users that will be able to view this company information.



Click on Save when you are finished. If you would like to add another company, click on the arrow next to the Save button and select Save and Create Another.