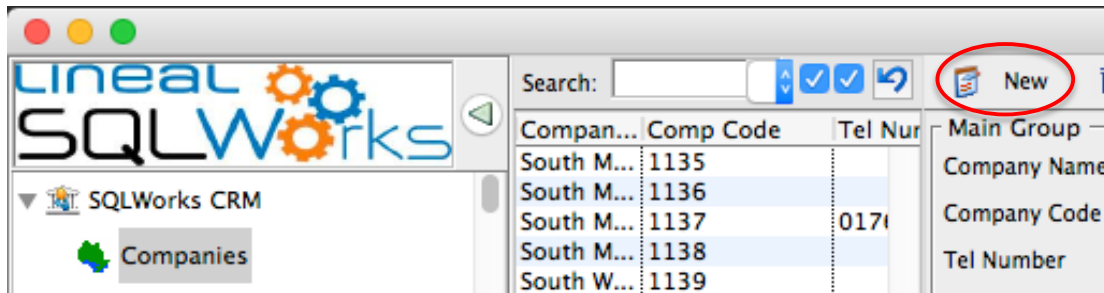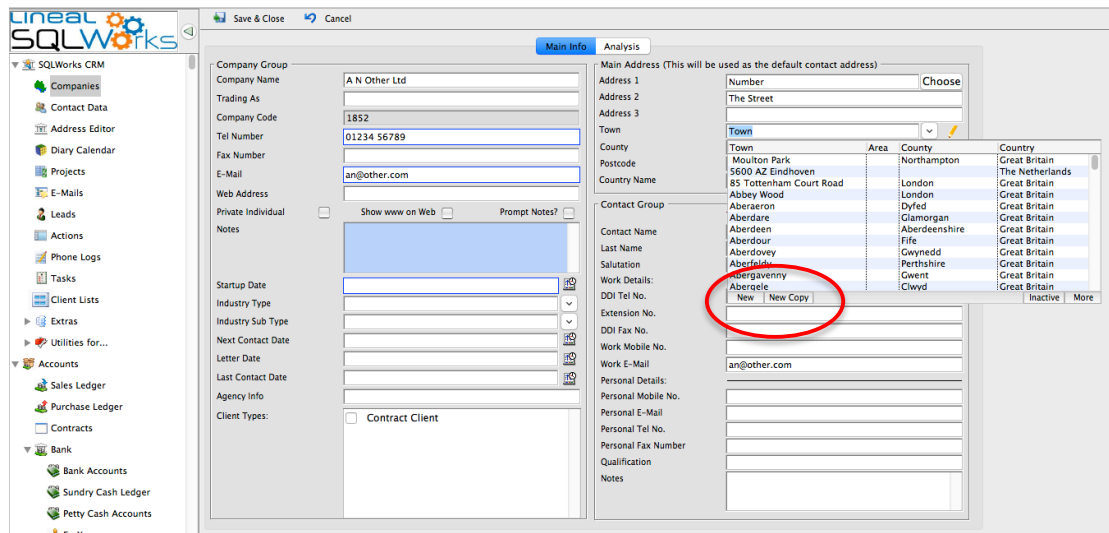## How to add a new Company

Procedure

1. To add a new Company to your records, expand the SQLWorks CRM list on the left Navigation Bar, then click on "Companies"

2. Select "New" from the top tool bar.

3. Note that some fields have drop-down lists from which you can select an existing Town, County and Country. If the town does not appear, selecting "New" at the bottom of this drop-down list will bring up a dialogue box in which you can create a new Town along with its County and Country. It is important that you check the town does not already exist in this list before creating a new one, as duplicate towns could generate error messages.

4. "New Copy" is useful shortcut when entering a new town if the county is already listed. This allows you to overwrite the copied town to save time typing out recurring counties and countries. "Save & Close" stores your new town.

5. Once all the relevant details for the Company are entered, select Save & Close to store your new Company. You will be asked if you would like to add the Company to the Sales Ledger and the Purchase Ledger if you have these modules.

6. Companies can be edited or added to your Ledgers at a later date.