





## 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"

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LINEAL 🖓🚗	Search:	🍤 🧊 New 🔋
	Compan Comp Code Te	Nur Main Group -
	South M 1135	Company Name
💌 🏦 SOLWorks CRM	South M 1136	
	South M 1137 01	71 Company Code
🚢 Companies	South M 1138	Tel Number
•	South W 1139	rentaniber

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

Lineal 😋 🗛 👘	🐁 Save & Close 🏼 🌳	Cancel				
SQLWörks	1	Main Ir	fo Analysis			
🔻 🕸 SQLWorks CRM	Company Group		Main Address (This will	be used as the default contact add	ress)	
Companier	Company Name	A N Other Ltd	Address 1	Number	Choose	
- companies	Trading As		Address 2	The Street		
🍇 Contact Data	Company Code	1052	Address 3			
III Address Editor	Tel Number	1852	Town	Town	· /	
醇 Diary Calendar	Fax Number	01234 30789	County	Town	Area County	Country
The Decision of the Control of the C	Tax Homber		Postcode	Moulton Park	Northampton	Great Britain
ing Projects	E-Mail	an@other.com	Country Name	85 Tottenham Court Road	London	Great Britain
📴 E-Mails	Web Address			Abbey Wood	London	Great Britain
<b>A</b>	Private Individual	Show were on Web Promot Noter?	Contact Group	Aberaeron	Dyfed	Great Britain
🔏 Leads	Private individual	Show www on web		Aberdare	Glamorgan	Great Britain
Actions	Notes		Contact Name	Aberdeen	Aberdeenshire	Great Britain
			Last Name	Aberdovev	Fire	Great Britain
🛒 Phone Logs			Salutation	Aberfeldy	Perthshire	Great Britain
10 Tasks			Salutation	apergavenny	Gwent	Great Britain
E Tasks	Startup Date	19	work Details:	Abergele	Clwyd	Great Britain
Client Lists	Industry Type		DDI Tel No.	New New Copy		Inactive More
	industry type		Extension No.			
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🔻 🖉 Accounts	Letter Date	10 III III III III III III III III III I	Work E-Mail	an@other.com		
at Sales Ledger	Last Contact Date	<u>I</u>	Personal Details:			
at Durahara Ladara	Agency Info		Personal Mobile No.			
a Purchase Ledger	Client Types:	Contract Client	Personal E-Mail			
Contracts			Personal Tel No.			
🔻 🧱 Bank			Personal Fax Number			
😻 Bank Accounts			Qualification			
Sundry Cash Ledger						
😻 Petty Cash Accounts						
🝰 ForX	-					

- 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.