

Companies Table

This table holds information about companies that interact with your organization. It may include customers, vendors, prospects, or manufacturers, to name a few.

Use Case for Companies

Companies may be created by conversion from the Leads or Contracts table. Members of the Admin, Business Admin, Contract Manager, Contract Creator, Contract Owner, Marketing, Project Manager, and Sales groups may also create new company records. For contract management users, companies can be created with an action button when filling out a new contract record.

The Company table contains mostly static data, and thus does not have any associated workflow actions.

Company address information is stored in the Locations background table and displayed on the Locations and Contacts tab. A parent company may have several locations, e.g., a billing office, branch locations, and headquarters.

Company Locations

Status: 2 record(s) found, 1 pages. Click [here](#) to re-count records.

New Unlink Views ▾

<input type="checkbox"/>	Edit	ID ↓	Company Name	Location Name	Location Type	Telephone	Fax	City	State / Province
<input type="checkbox"/>		17	Agiloft	Primary Billing	Billing			Petersburg	FL
<input type="checkbox"/>		13	Agiloft	Redwood City	Headquarters, Physical			Redwood City	CA

Main Location [Redwood City ▾](#)

Many other tables link to the information stored in the Companies table. The Related Records tab shows related tables for Support Cases, Contracts, Insurance Certificates, and Assets. When relevant, new Insurance Certificates are typically added from the Company record. An Insurance Certificate Owner is defined just above the Insurance Certificates related table. The Insurance Certificate Owner is notified fourteen days before one or more certificates is due to expire, provided that there is at least one active or pending contract. In the certificate record, the Main Contact is the primary contact at the vendor company.

Insurance Certificates

Insurance Certificate **Maurice Sendak** 
Owner

Insurance Certificate 
Owner Email

Status: 2 record(s) found, 1 pages. Click [here](#) to re-count records.

New | Mass Edit | Delete  | Unlink | Actions ▾ | Views ▾ | Search ▾ 

<input type="checkbox"/> Edit	ID ↓	Type of Certificate	Status	Amount of Coverage	Expiration Date	Attached Files
<input type="checkbox"/> 	6	General Liability	Expired	\$10,000.00	Feb 15 2016	
<input type="checkbox"/> 	5	Excess Liability	Valid	\$500,000.00	May 01 2017	

No. of Active Insurance 1
Certificates

Insurance certificates added to a company record are automatically linked to all contracts associated with the vendor company. See the [Insurance CoveragesTable](#) for more information.

Ownership of Companies

Records in this table are "owned" by the individual assigned sales representative. Admins and members of the Contract Owner, Contract Manager, Marketing, Project Manager, and Sales groups can view and edit Companies. Most groups can view their own Company, and most internal users can view others' Companies.