Companies

The Companies table holds information about entities, organizations, and companies that interact with your organization. It may include customers, vendors, prospects, manufacturers, or companies with any other type of relationship.

Use Case

Companies may be created by conversion from the Leads or Contracts table. Members of the Admin, Professional Services, Support Staff and Sales groups may also create new Company records directly. 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.

Information about a company and a company's relationship to your organization is stored in the company record. This information can be everything from the company's billing address to information about their support contracts with your company. More complex data relationships are displayed via linked fields, which pull any records from the Contacts and Opportunities tables that reference the Company record. This allows you to see any business deals or transactions in progress and keep track of any Company employees that your organization contacts.

Company address information is stored in the Locations 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.

Screenshot of Company Locations table within a company

As a background table, 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.

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 within a company

Insurance certificates added to a company record are automatically linked to all contracts associated with the vendor company.

Ownership

Records in this table are owned by the individual assigned sales rep, so each record is associated with a particular user login. 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.