Companies: Update or Create New

Note to reviewer: Links may need to be updated after this page is moved to correct home location.

Updating info on an existing company

1. After logging into Portal, Click the Companies option from the list under Your Documents.
   * This will show you a list of the companies you have access to.
2. Select the company you need to update.
   * You can also use the search feature located in the upper right to quickly find a company.
3. Next click the **Edit / pencil** button in the upper left to switch the record into edit mode.
4. Update info as needed.
5. Save the record by clicking the **Save / checkmark** button in the upper left.

Creating a new company

* You will find there are several workflows to create new companies but here is one that works best without needing to watch for possible "I wonder how it got that way" situations.

1. After logging into Portal, click the Companies option from the list under Your Documents.
   * This will show you a list of the companies you have access to.
2. Click the **Add record / +** button in the upper left.
3. Fill out all the info that you can. Email is required but if this company doesn't have an email address you may use `none@none.com` .
4. Make sure church affiliation and accountability are correct.
   * Log server # is only applicable to Weatec users.
   * If you are setting up a company that is not apart of the church you are apart of, do NOT update this info until the device setup is complete
   * Adjusting accountability settings may take a 2 step save and edit process where you set the affiliation the first try and then the accountability with a second edit / adjustment.
   * This info is auto-filled based on accountability settings of the user logged into portal.
5. Save the record by clicking the **Save / checkmark** button in the upper left.