

Company

Create or Edit the Company Record

Where is the Company Record Located?

- **Company > Find > "Your company name"**

Why & When to Access the Company Record

The Company Record is the area where your company name, address, and phone number are entered. Company Record must be changed when information about the business changes, like address, phone number, or business name.

The Company Record is also where company policies and accounting integration information is located. If you change your accounting software or decide to augment company policies, it will be necessary to update those changes in the Company Record.

The screenshot shows a software window titled "Company" with three tabs: "General", "Policies", and "Accounting". The "General" tab is active, displaying the "Company Attributes" section. This section includes fields for Name, Federal ID, Fax Number, Phone Number, and E-mail Address, along with checkboxes for "Link To Accounting" and "Accounting Solution" (set to "QuickBooks"). Below these is a section for "Address" with fields for Address Line 1, Address Line 2, City, State, Zip, and Country. At the bottom is a section for "GTIN Identifiers" with fields for Pack ID, Prefix ID, and Prefix Length. The window has standard Windows-style controls (minimize, maximize, close) in the top right corner and "Save", "Save & Close", and "Close" buttons at the bottom right.

Features in the Company Record

The following tabs may be visible when you double-click on the Company name:

- **General:** contains **Company Attributes** such as name, email, and an option to link to accounting, **Address** information, and **GTIN Identifiers**.
- **Process Policies:** offers policies on all aspects of the business process. Use

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the "+" symbol to expand and view options.

- **General Policies:** offers only one top category of policies. Use the "+" symbol to expand and view options. These policies are either very specific to an action in Envio (such as **Handhelds**) or very broad with far reaching impact such as **Warn Allow**.
- **Accounting Option:** If available, this tab will have the name of the accounting software your business has chosen to use. This tab will have connection information and allow a quick search of data to verify by clicking the **Customer, Vendors, or Chart of Accounts**. When data fills in the empty space, accounting is interfacing with Envio.
 - If accounting integration is not selected, the tab will not be needed.
- **Email Credentials:** offers ability to integrate an auto-email function. This is an add-on module that must be activated to be used. Contact support for further information.

Troubleshooting:

- Changing the name on the General tab will change the company name when you login to Envio. Do not change this name unless it is a company-wide decision.
- Each Accounting package requires a different installation process. Check with an Envio support person to ensure you've installed the correct software.
- This area is usually reserved for administrator access only.

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