



Companies

A Company refers to an organization to whom you are providing field services.

 Available in Editions: **All Editions**

Add Companies

Companies can be added in the following ways:

1. Add companies individually in the **Companies** module. The details are described below.
2. [Import companies](#) from external sources.
3. Import companies from [Invoice](#).

To add a company:

 **Permission Required:** [Companies](#)

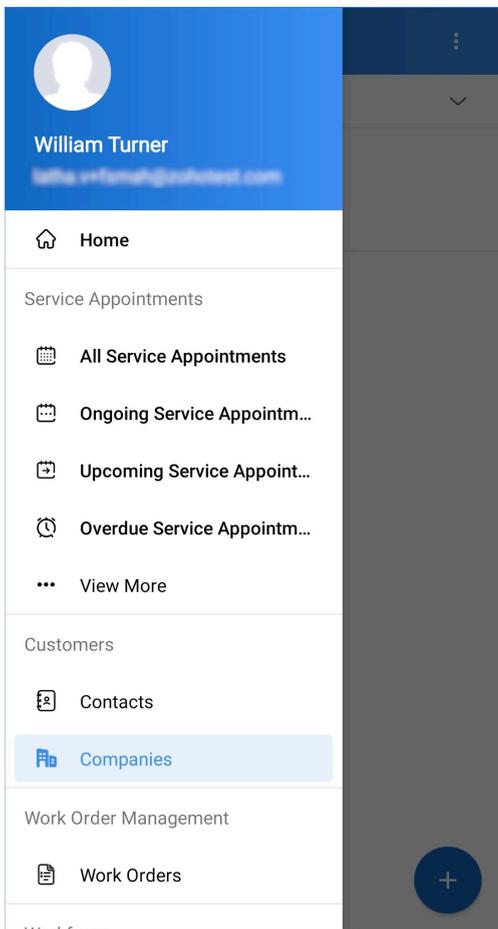
1. Select **Companies** from the **Customers** menu and click **Create**.
2. Enter the **Company Name**.
3. Select a value for **Taxable**.
 - **Taxable:** A Company Tax should be selected if Taxable is chosen.
 - **Non-Taxable:** An [Exemption Reason](#) should be selected if Non-Taxable is chosen.These values are configured in Zoho Invoice. Click [here](#) for details of Zoho Invoice-FSM integration. These values can also be edited in the FSM application at **Setup > Integrations > Billing > Tax Setting**.
4. Select a value for **Currency**.

You can configure these values at **Setup > General > Currency**.
5. Add any other necessary details and click **Save**.

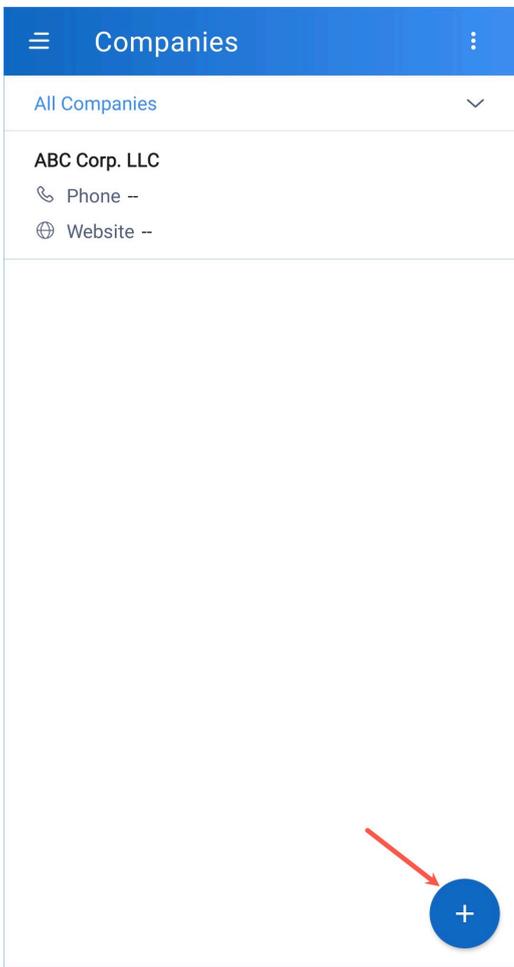
Add Company from Mobile App

To create a company:

1. Select **Companies**, in the left menu.



2. In the *Companies* screen, tap the add [+] icon.



3. In the *Create Company* page, enter the necessary details and click **Save**.

← Create Company
Save

Company Details

* Company Name	Zenith Pvt Ltd
Website	
Email	
Phone	888-888-8888
Mobile	9764108234
Company Type	Customer ▼
* Currency	USD ▼
* Exchange Rate	1.000000000

Address

Service Address	Service Address, 901 1st St, Colona, Illinois, United States , 61241 >
Billing Address	Service Address, 901 1st St, Colona, Illinois, United States , 61241 >

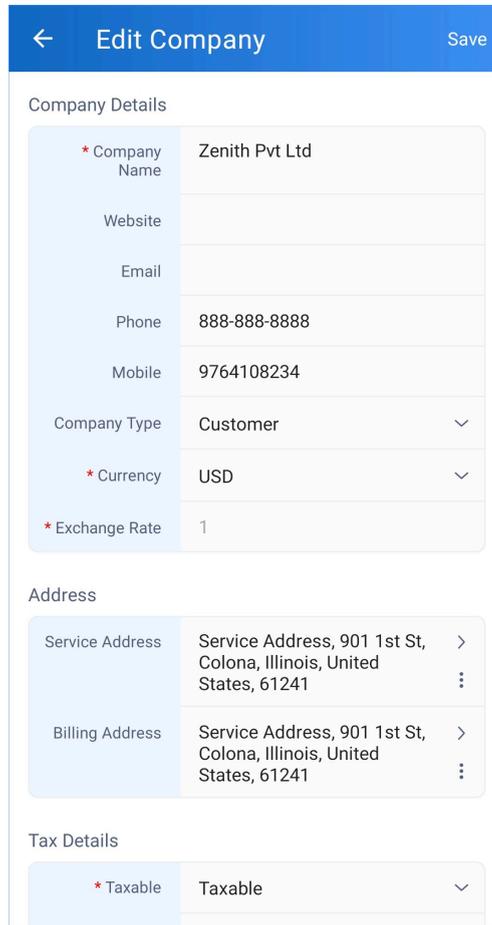
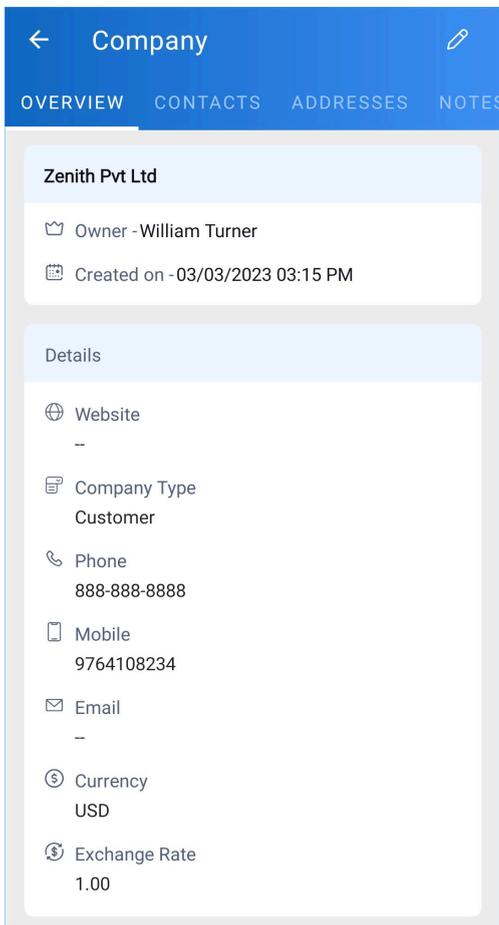
Tax Details

* Taxable	Taxable ▼
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- In the lookup fields, you can do an [advanced search](#).
- In the address fields, you can [add](#) addresses.
- The Currency and Exchange Rate will be displayed only if [multiple currencies](#) are enabled.

The created company can be edited. To edit a company:

1. Click the **Edit** [✎] icon on the top right side.
2. Make the necessary changes and click **Save**.



You can also add addresses, and notes.

Delete Company Address

You can delete the addresses added to a company. To delete a company address:

1. Select **Companies** from the **Customers** menu and select the company record whose address you want to delete.
2. Select the **Addresses** tab.
3. Hover over the address and click the **Delete** [🗑️] icon.
4. Click **Yes, Delete** in the confirmation message to proceed.

The screenshot shows the FSM web interface for a company named 'Acme Pvt Ltd'. The 'Addresses' tab is active, displaying a table with columns: Address Name, Street 1, Street 2, City, State, Country, Zip Code, and Terri. Two addresses are listed: 'Billing Address' (300 E Laurel St, Springfield, Illinois, United States, 62703) and 'Service Address' (2540 S 1st St, Springfield, Illinois, United States, 62704). A red circle highlights the delete icon (trash can) in the 'More Options' menu for the 'Billing Address' row.

Address Name	Street 1	Street 2	City	State	Country	Zip Code	Terri
Billing Address	300 E Laurel St		Springfield	Illinois	United States	62703	
Service Address	2540 S 1st St		Springfield	Illinois	United States	62704	Zylk

Note:

- Deleting an address will not affect any existing records (work orders, service appointments, etc) where this address is used.
- You can delete a company address only if you have the **Delete** permission for the Contact, and Company modules.

Delete Company Address From Mobile App

To delete a company address:

1. Open the record and tap the **Addresses** tab.
2. Tap **more options** [⋮] in the address entry and select **Delete**.

← Company  

NEW CONTACTS ADDRESSES NOTES RELATIONS

Service Address 

2900 Rue Einstein, Québec City, QC
Canada, G1X 4B3

Territory - Quebec

 Edit

 Delete

Billing Address 

1470 Av. Jules-Verne, Québec City, G2G 2R5,
Canada, Quebec

Territory - Quebec Tax - Salestax

