

Company Setup

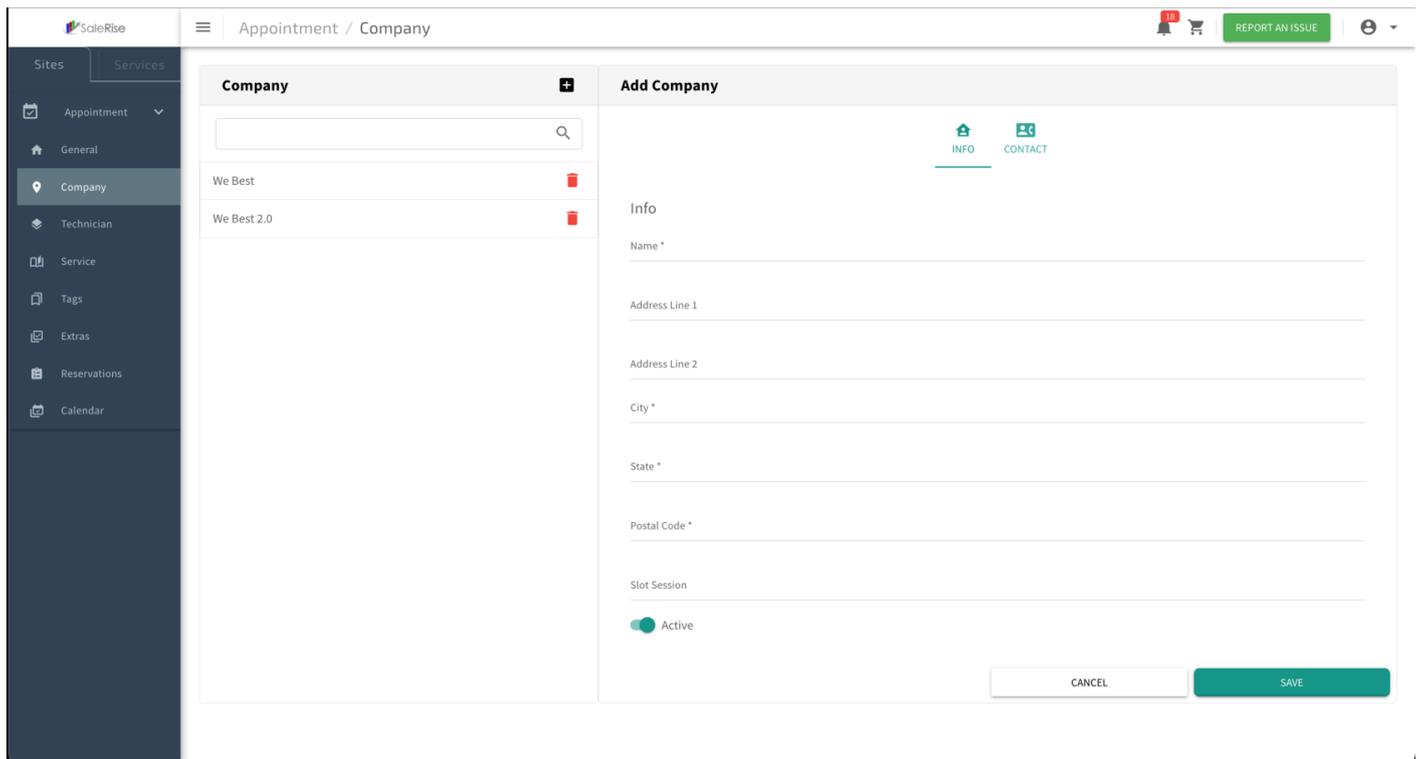
In the "Company Setup" module, users can effortlessly create and manage a company by providing essential information such as name, address, city, state, postal code, slot, and contact details. The option to activate or deactivate a company ensures flexible management.

- [Add or Edit Company](#)

Add or Edit Company

Overview:

In the "Company Setup" module, users can effortlessly create and manage a company by providing essential information such as name, address, city, state, postal code, slot, and contact details. The option to activate or deactivate a company ensures flexible management.



The screenshot displays the 'Add Company' form within the SaleRise application. The interface includes a top navigation bar with the 'SaleRise' logo, a breadcrumb trail 'Appointment / Company', and utility icons for notifications, a shopping cart, and a 'REPORT AN ISSUE' button. A left-hand sidebar menu lists various system modules: Sites, Services, Appointment, General, Company (selected), Technician, Service, Tags, Extras, Reservations, and Calendar. The main content area is split into two panels. The left panel, titled 'Company', shows a search bar and a list of existing companies: 'We Best' and 'We Best 2.0', each with a delete icon. The right panel, titled 'Add Company', contains an 'Info' section with the following fields: 'Name *', 'Address Line 1', 'Address Line 2', 'City *', 'State *', and 'Postal Code *'. Below these is a 'Slot Session' field and an 'Active' toggle switch currently set to 'On'. At the bottom right of the form are 'CANCEL' and 'SAVE' buttons.

1. Access "Company Setup":

- Navigate to the "Company Setup" module to create or manage the company.

2. Add New Company:

- Click on "Add New Company" to initiate the setup process.

The screenshot displays the 'Add Company' form in the SoleRise application. The form is divided into two main sections: a list of existing companies on the left and a detailed form for adding a new company on the right. The 'Add Company' form includes the following fields:

- Name *
- Address Line 1
- Address Line 2
- City *
- State *
- Postal Code *
- Slot Session
- Active (toggle switch)

The form also features 'CANCEL' and 'SAVE' buttons at the bottom right. A red box highlights the '+ Add Company' button in the top right of the list, with a red arrow pointing to it.

3. Basic Information:

- Fill in the essential details for the clinic.
 - **Company Name:** Provide a unique name for the company.
 - **Address:** Enter the physical address of the company.
 - **City, State, Postal Code:** Specify the location details.

4. Activation Options:

- Choose the activation status for the company.
 - **Active:** The company is currently operational.
 - **Inactive:** Temporarily deactivate the company.

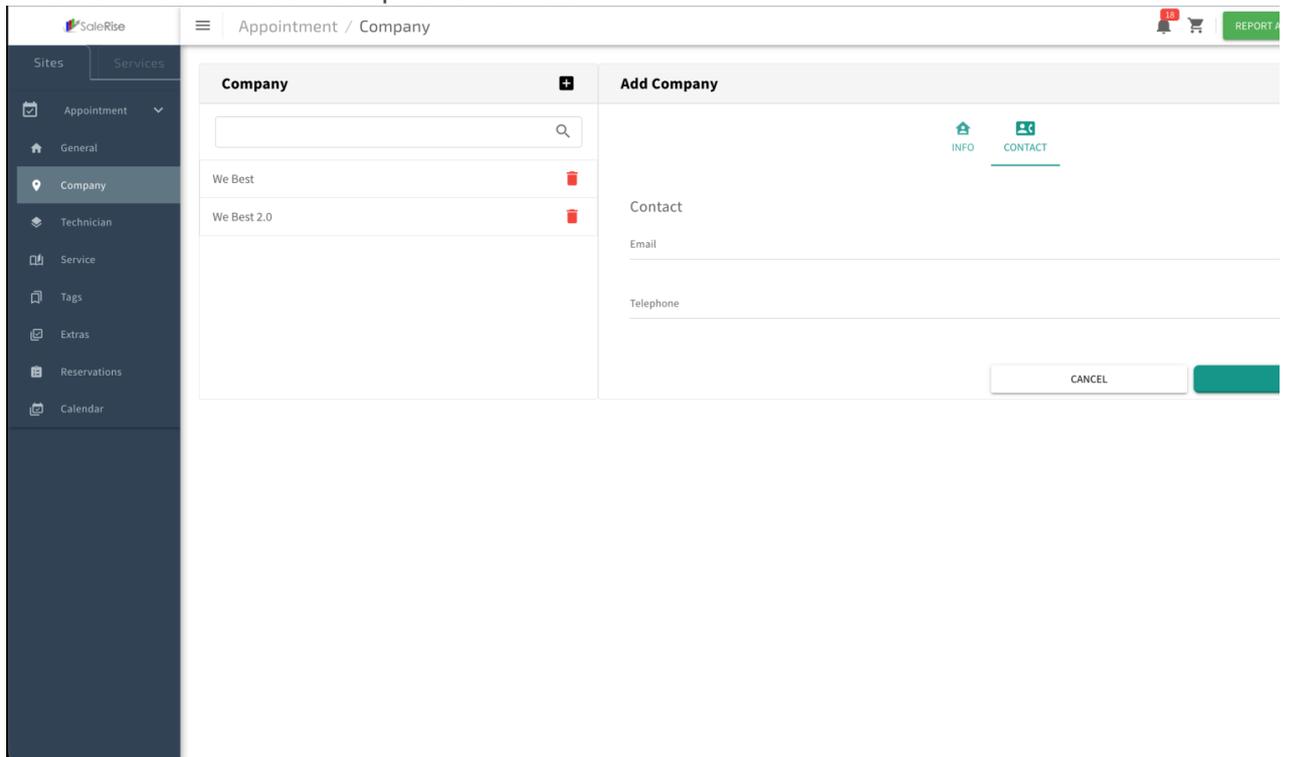
5. Save Basic Details:

- Click "Save" to confirm the basic information set up.

6. Add Contact Information:

- Navigate to the "Contact Information" section to provide additional details.
 - **Email:** Enter the company contact email.

- o **Phone:** Provide a contact phone number.



7. Save Contact Details:

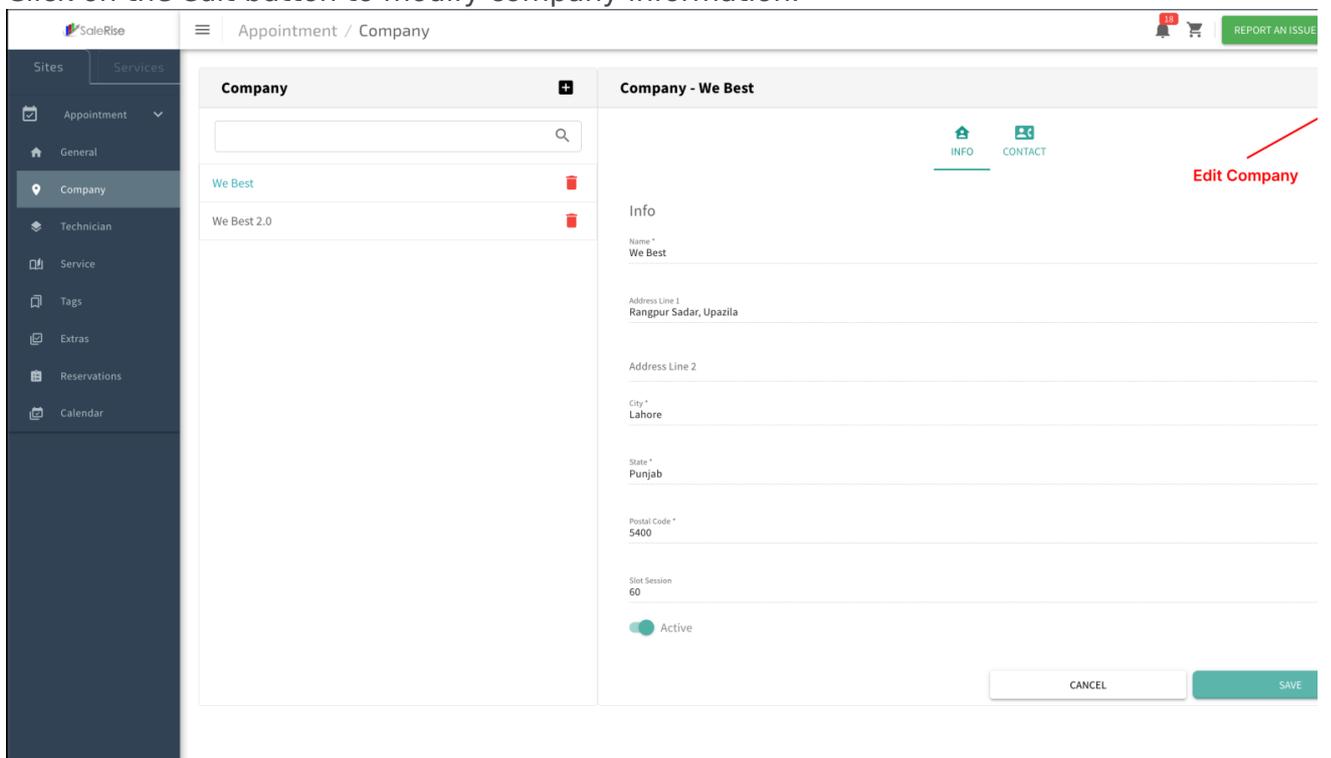
- Click "Save" to confirm the contact information setup.

8. View and Manage Company:

- Access the list of companies with options to edit or deactivate.

9. Edit Company Details:

- Click on the edit button to modify company information.



10. Deactivate Company:

- Temporarily deactivate a company when needed.

11. Reactivation:

- Easily reactivate a deactivated company.