

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 in the SoleRise application. The sidebar on the left contains navigation links for Sites, Services, Appointment, General, Company, Technician, Service, Tags, Extras, Reservations, and Calendar. The main content area is titled 'Appointment / Company' and features a table of existing companies and a form to add a new one. The table lists two companies: 'We Best' and 'We Best 2.0', each with a red trash icon. The form on the right is titled 'Add Company' and includes tabs for 'INFO' and 'CONTACT'. The 'INFO' tab is active, showing fields for Name, Address Line 1, Address Line 2, City, State, Postal Code, Slot Session, and an 'Active' toggle switch. The 'Active' toggle is currently turned on. At the bottom right of the form are 'CANCEL' and 'SAVE' buttons.

| Company | |
|-------------|--|
| We Best | |
| We Best 2.0 | |

Add Company

Info

Name *

Address Line 1

Address Line 2

City *

State *

Postal Code *

Slot Session

☒ Active

CANCEL SAVE

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 sidebar on the left contains navigation links for Sites, Services, Appointment, General, Company, Technician, Service, Tags, Extras, Reservations, and Calendar. The main content area is titled 'Appointment / Company' and features a table of existing companies with columns for company name and an 'Add Company' button. A red box highlights this button, and a red arrow points to it from the text 'Add Company' below. The form fields include Name, Address Line 1, Address Line 2, City, State, Postal Code, Slot Session, and an Active toggle switch. At the bottom right are 'CANCEL' and 'SAVE' buttons.

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.

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

The screenshot shows the 'Add Company' form in the SoleRise application. The left sidebar is on the 'Company' page. The main content area is split into two panels. The left panel shows a list of companies: 'We Best' and 'We Best 2.0'. The right panel is titled 'Add Company' and has two tabs: 'INFO' and 'CONTACT'. The 'CONTACT' tab is selected, showing fields for 'Email' and 'Telephone'. A 'CANCEL' button is located at the bottom right of the form.

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.

The screenshot shows the 'Edit Company' form for 'We Best' in the SoleRise application. The left sidebar is on the 'Company' page. The main content area is split into two panels. The left panel shows a list of companies: 'We Best' and 'We Best 2.0'. The right panel is titled 'Company - We Best' and has two tabs: 'INFO' and 'CONTACT'. The 'INFO' tab is selected, showing fields for 'Name', 'Address Line 1', 'Address Line 2', 'City', 'State', 'Postal Code', 'Slot Session', and an 'Active' toggle. A red arrow points to the 'Edit Company' button in the top right corner.

10. **Deactivate Company:**

- Temporarily deactivate a company when needed.

11. **Reactivation:**

- Easily reactivate a deactivated company.

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