



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:

i **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**.

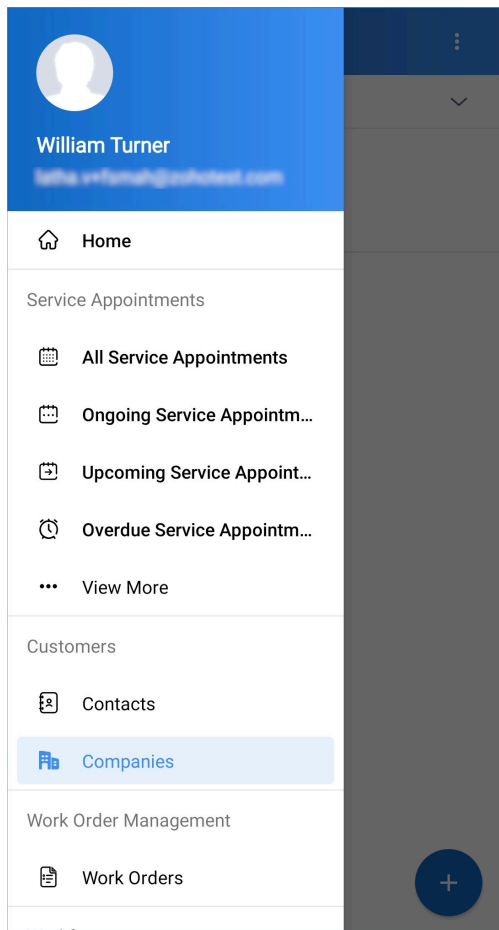
You can configure these values at **Setup > General > Currency**.

5. Add any other necessary details and click **Save**.

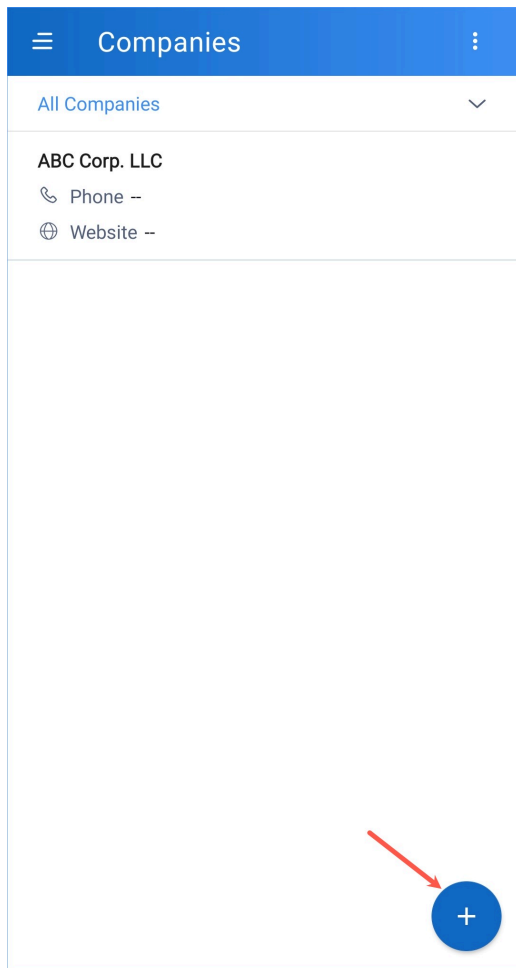
Add Company from Mobile App

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


▼

- 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**.


<https://help.zoho.com/portal/en/kb/fsm/customer-management/articles/manage-companies>

← Company 


OVERVIEW CONTACTS ADDRESSES NOTES


Zenith Pvt Ltd


 Owner - William Turner


 Created on - 03/03/2023 03:15 PM


Details


 Website
--


 Company Type
Customer

 Phone
888-888-8888

 Mobile
9764108234

 Email
--

 Currency
USD

 Exchange Rate
1.00

← Edit 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

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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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.

FSM Home Customers Work Order Management Dispatch Console Services And Parts Assets Reports ...

Companies Acme Pvt Ltd

Marianne Sheehan Edit < >

Details

- Website --
- Company Type --
- Phone --
- Mobile --
- Email --



Address

- Service Address
SERVICE ADDRESS
2540 S 1st St,
Springfield, Illinois, 62704,
United States
- Billing Address
SERVICE ADDRESS
2540 S 1st St,
Springfield, Illinois, 62704,
United States

Tax

Timeline **Contacts** **Addresses** **Notes** **Related list**

+ Create

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:

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

