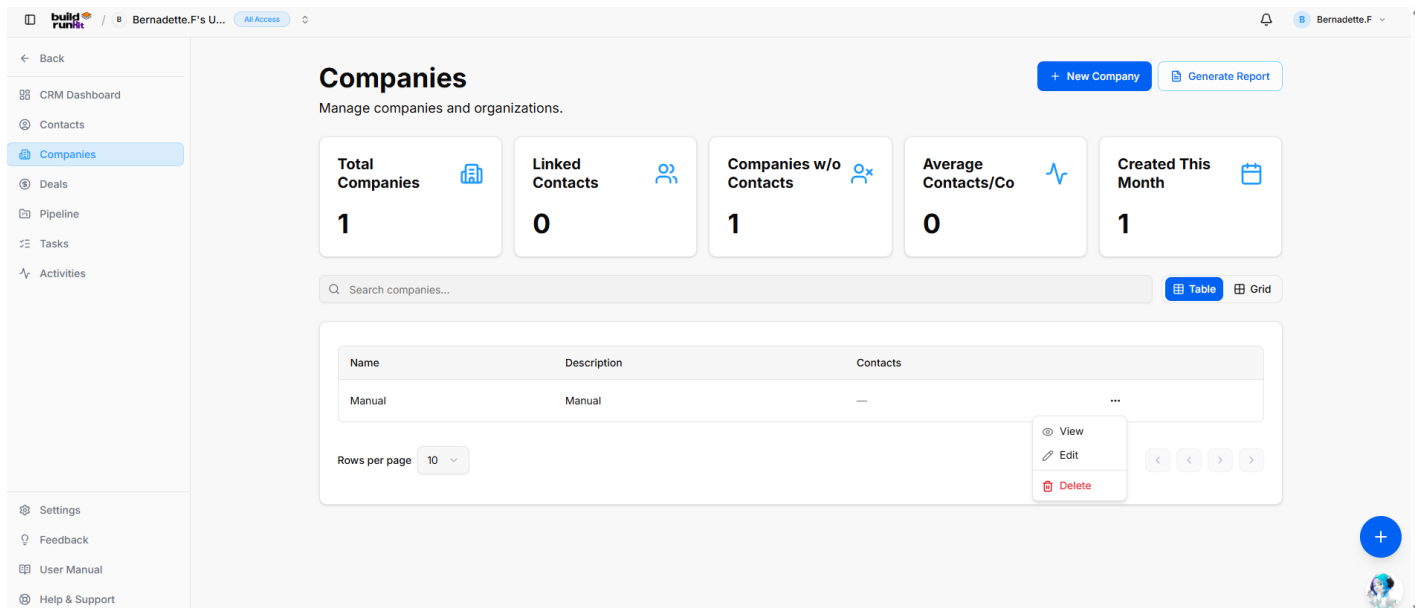


BuildRunKit CRM: Companies Sub-Section

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The **Companies** sub-section provides central organizational tracking for client businesses, partner organizations, and parent accounts.

Header & Action Buttons

- **+ New Company:** Direct action button to open the company setup modal.
- **Generate Report:** Opens the **CRM Companies Report** export modal:
 - **Export Count:** Displays total targeted organization records (e.g., *Exporting 1 records*).
 - **Export Format Options:** Allows instant downloads via **Export as PDF** or **Export as CSV**.

CRM Companies Report

Generate a report for the CRM Companies data.

Exporting 1 records

Export format

Export as PDF

Export as CSV

Company Summary Metrics

Top KPI cards display key account breakdown totals:

- **Total Companies:** Tracks the overall number of registered organization profiles.
- **Linked Contacts:** Counts individual contact records attached across all company profiles.
- **Companies w/o Contacts:** Identifies orphaned company records requiring contact assignment.
- **Average Contacts/Co:** Displays the mean contact ratio per parent organization profile.
- **Created This Month:** Highlights recent client onboarding growth and newly registered companies.

Directory Controls & Search Bar

- **Search companies...:** Global filter input for locating accounts by name or description keywords.
- **View Switches:** Toggle viewing modes between **Table** (list layout) and **Grid** (card layout).
- **Rows per page:** Dropdown selector to control row density per page (e.g., 10 rows).
- **Pagination:** Standard directional controls to step through company pages.

Companies Table Data Columns

- **Name:** Primary registered company or trading entity name.

- **Description:** High-level summary of the company's business focus or internal account notes.
- **Contacts:** Total linked contact profiles associated with the organization.

Row Actions Menu ()

Clicking the three dots icon on any company row displays quick record management actions:

- **View:** Opens the dedicated company profile view showing linked contacts, attached deals, and account history.
- **Edit:** Opens the setup editor to update organization details, company descriptions, or associated profiles.
- **Delete:** Removes the organization record from the CRM directory.

BuildRunKit CRM: Adding a New Company

New Company

Name *

Description

Owner

No owner

No owner

Bernadette.F

Cancel

Save

Clicking the + **New Company** button opens the creation modal to register a new organization profile:

- **Name ***: Required field to enter the company or trading name.
- **Description**: Multi-line text field to log details, business focus, or general account notes.
- **Owner**: Dropdown selector to assign account responsibility to active team members within your workspace.
- **Modal Actions**: Click **Cancel** to discard or **Save** to create the record.

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