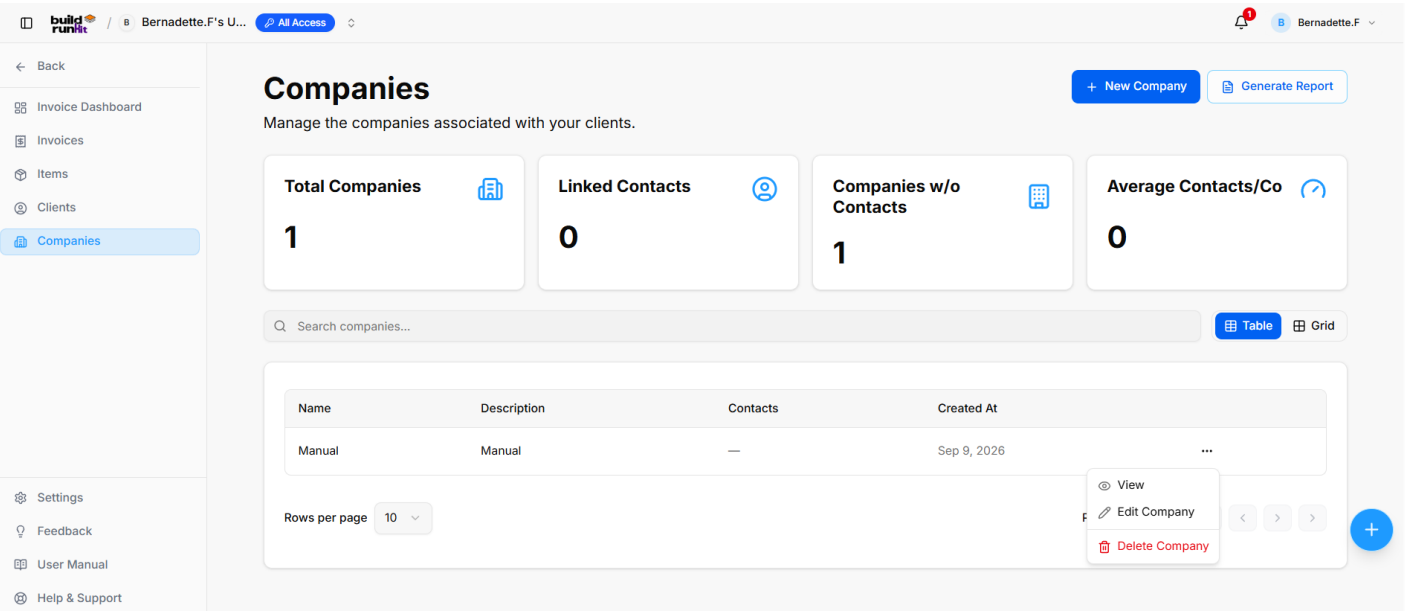


BuildRunKit Invoices: Companies Sub-Section

BuildRunKit Invoices: Companies Sub-Section



The **Companies** sub-section provides central directory management for client businesses, partner organizations, and associated company accounts.

Company Summary Metrics

Top KPI cards display key organization breakdown totals:

- **Total Companies:** Tracks the overall number of registered company profiles (e.g., 1).
- **Linked Contacts:** Counts individual contact records attached across all company profiles (e.g., 0).
- **Companies w/o Contacts:** Identifies orphaned company records requiring contact assignment (e.g., 1).

- **Average Contacts/Co:** Displays the mean contact ratio per parent organization profile (e.g., )

Directory Controls & Search Bar

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

Companies Table Data Columns

- **Name:** Primary registered company or trading entity name (e.g., *Manual*).
- **Description:** High-level summary of the company's business focus or internal account notes (e.g., *Manual*).
- **Contacts:** Total linked contact profiles associated with the organization (e.g., )
- **Created At:** Date when the company record was added (e.g., *Sep 9, 2026*).

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 and account details.
- **Edit Company:** Opens the setup editor to update organization details or descriptions.
- **Delete Company:** Removes the organization record from the directory.

Header & Action Buttons

- **+ New Company:** Direct action button to open the company setup modal.
- **Generate Report:** Opens the **Invoice 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**.

 **Invoice Companies Report** ×

Generate a report for the Invoice Companies data.

Exporting **1** records

Export format

 **Export as PDF**

 **Export as CSV**

BuildRunKit Invoices: Creating a New Company

New Company

×

Name *

Description

Owner

No owner

Cancel

Save

The **New Company** modal provides a setup interface for creating and registering organization profiles in the Companies directory.

Input Fields & Form Controls

- **Name ***: Required text field to enter the official company or business entity name.
- **Description**: Optional text area to provide company details, business overview, or internal account notes.
- **Owner**: Dropdown menu to assign an internal team member or account manager (*No owner*).

Header & Action Buttons

- **Close** (✕): Top-right icon to dismiss the modal without saving changes.
- **Cancel**: Outline button to close the modal and discard entered information.

- **Save:** Primary blue action button to register and save the new company profile.
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