

How to add a new organization or company

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Organizations (also called Companies) represent foundations, businesses, churches, schools, government entities, and other groups you work with.

Steps

1. Navigate to **Organizations** or **Companies** (the exact label may vary).
2. Click **New Organization** (or + Add).
3. Enter the organization name and any relevant details:
 - Address
 - Website
 - Main phone number
 - Primary contact person (if known)
 - Notes
4. Click **Save**.

After the organization exists, you can link individual contacts to it. This lets you see everyone associated with that organization and is especially useful for corporate donors, foundation relationships, and partner organizations.

Tip: Keep organization names consistent (avoid creating "ABC Foundation", "ABC Found.", and "A.B.C. Foundation" as separate records).