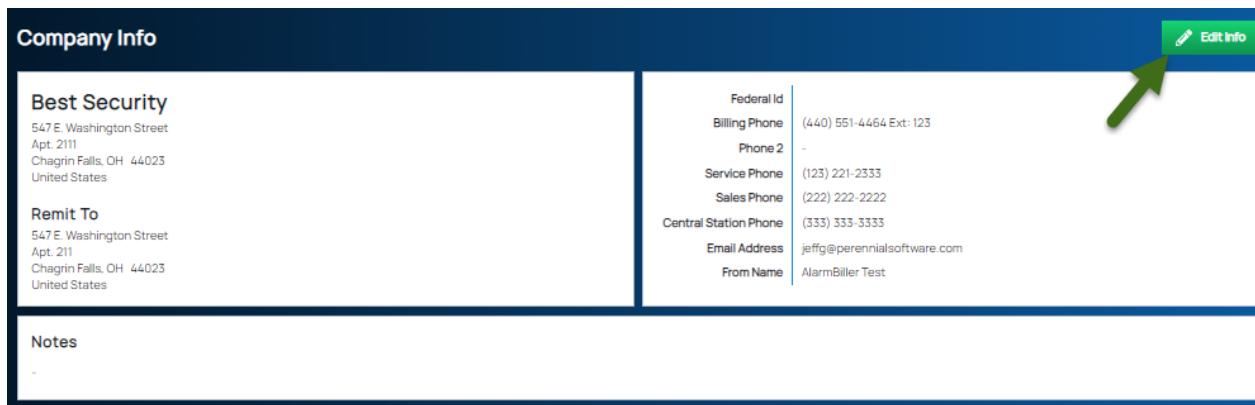


Company Info

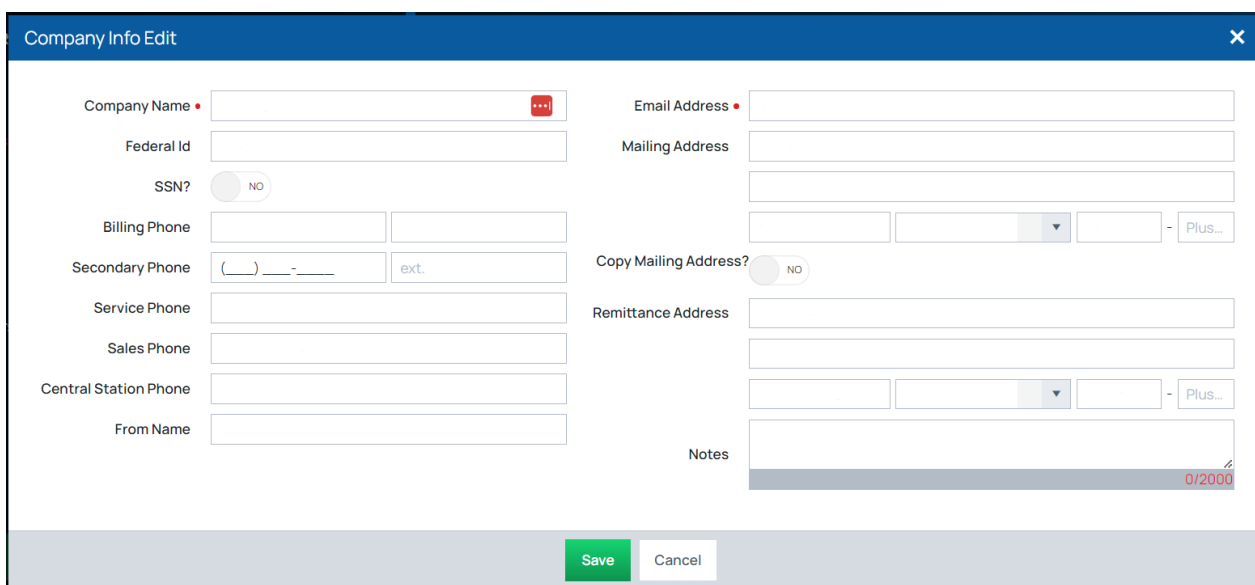
Last Modified on 10/25/2023 10:56 am EDT

The Company Info setup page is used to enter information related to your company. Click the **Edit Info** button at the upper right to enter or make changes.



The screenshot shows the 'Company Info' page. At the top right, there is a green 'Edit Info' button with a pencil icon, which is highlighted by a green arrow. The page is divided into two main sections. The left section contains 'Best Security' and 'Remit To' information, both listing the address: 547 E. Washington Street, Apt. 211, Chagrin Falls, OH 44023, United States. The right section lists various phone numbers and contact information: Federal Id, Billing Phone (440) 551-4464 Ext: 123, Phone 2, Service Phone (123) 221-2333, Sales Phone (222) 222-2222, Central Station Phone (333) 333-3333, Email Address jeffg@perennialssoftware.com, and From Name AlarmBiller Test. Below these sections is a 'Notes' field which is currently empty.

The Company Info Edit form is displayed. Enter or edit your company information, and then click the **Save** button at the bottom of the form when finished. For definitions of each field on this form, refer to the list below.



The screenshot shows the 'Company Info Edit' form. It contains several input fields and a toggle button. The fields are: Company Name (required, marked with an asterisk and a red asterisk icon), Federal Id, SSN? (toggle button set to 'NO'), Billing Phone, Secondary Phone (with a format guide '(____) ____-____' and an 'ext.' field), Service Phone, Sales Phone, Central Station Phone, and From Name. On the right side, there are: Email Address (required, marked with an asterisk), Mailing Address, Copy Mailing Address? (toggle button set to 'NO'), Remittance Address, and Notes (with a character count of 0/2000). At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Data entry fields preceded with an asterisk are required.

- ***Company Name** – Enter the official name of your company.
- **Federal ID** – Enter the company’s Federal Tax ID number. A maximum of 9 characters.
- **SSN** – If a value was entered in the Federal ID field and your company reports under a social security number, set this toggle button to Yes.
- **Billing Phone** – Enter the telephone number your customers may call for billing-related questions. This phone number will be printed on the invoice form. A maximum of 10 numeric characters.
- **Secondary Phone** – Enter a secondary company phone number. This does not print on customer invoices. A maximum of 10 numeric characters.
- **Service Phone** – Enter the telephone number your customers may call for service-related questions. This

phone number prints on customer invoices. A maximum of 10 numeric characters.

- **Sales Phone** – Enter the telephone number your customers may call for sales-related questions. This phone number prints on customer invoices. A maximum of 10 numeric characters.
- **Central Station Phone** – Enter the telephone number your customers may call for central station-related questions. This phone number prints on customer invoices. A maximum of 10 numeric characters.
- **From Name** – If you have not uploaded an image file for invoice printing, then the text entered into this field is the name of the company sending the invoice to your customer.
- ***Email Address** – Enter your company's email address. This will print on customer invoices.
- **Mailing Address** – If you have not uploaded an image file for invoice printing (Setup > Company > Preferences > Logos), then the address entered into these fields is the address of the company sending the invoice to your customer.
- **Copy Mailing Address** – If the Mailing Address and the Remittance Address are the same, set this toggle button to On. The address information in the Mailing Address fields will auto-fill into the Remittance Address fields on customer invoices. If the Remittance Address is different from the Mailing Address, set this toggle button to Off, and then fill in the Remittance Address information.
- **Remittance Address** – If the Copy Mailing Address toggle was set to Off, enter the address information.
- **Notes** – This is a free-form text field for capturing any additional information about the company. A maximum of 2,000 characters.