

# Company records

This article applies to:

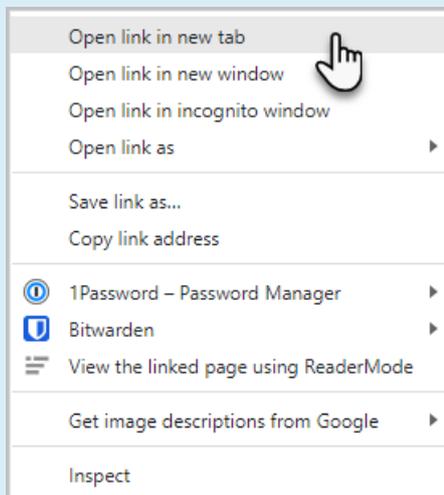
[Pro](#)

[Max](#)

Organize your relationships and keep important details about your companies front and center on the new Company record. You can use our default fields (phone, email, etc.) or add up to 100 of your own custom company fields for information that's unique to your business.

## Pro-Tip!

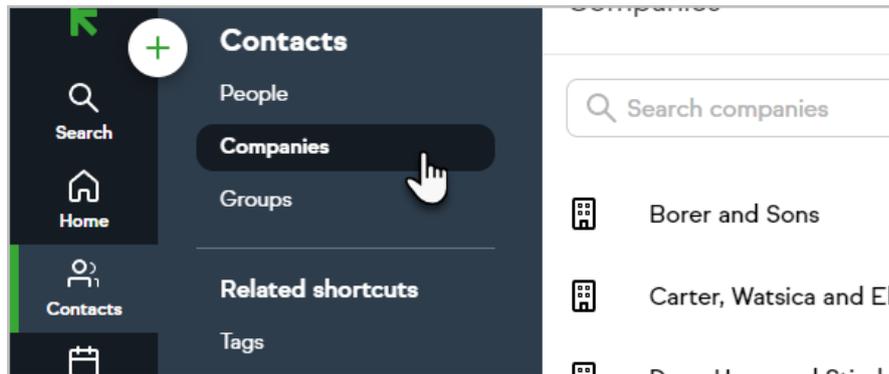
Sometimes a better workflow for working on multiple companies or contacts is to open them in individual browser tabs. To do this, just right click on a company record and choose "Open link in new tab".



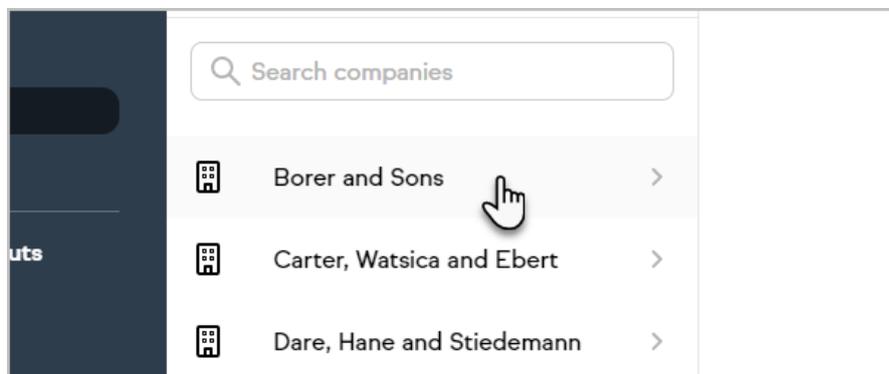
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## Access a company record

1. Navigate to your **Contacts > Companies**



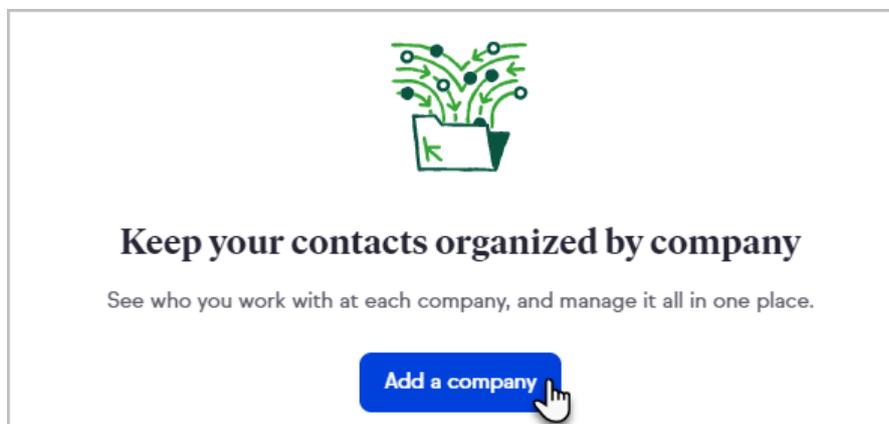
2. Select one of your companies from the list



## Add a company

Companies can also be created via the **Company** field in a [contact record's details](#) and will automatically be created during [contact imports](#).

1. Access your Companies list
2. Click **Add a company** or the **+ button** at the top of your Companies list



3. Enter the company name

✕ Add new company



Company\* 0/50

4. Add contacts and details to the company

Add Contacts

Albert Sampson ✕ Aaron Scott ✕ Dominic Taylor ✕

Phone (480) 555-5555 Type Work

Website http://www.keap.com

[Show more fields](#)

5. Click **Add company**

Phone (480) 555-5555 Type Work

Website http://www.keap.com

[Show more fields](#)

**Add company**

## Edit a company record

1. After accessing a company record, click **Edit**

New ▾

 Keap [Edit](#)

Phone: Office  
(866) 800-0004

Website  
http://keap.com

2. Modify the company information and click **Save** when finished

**Edit company** Cancel Save

Company name  
Keap

Phone  
(866) 800-0004

Type  
Office

Fax

## Standard company fields

In addition to the ability to create custom company fields, Keap includes the following standard fields for company records:

- About
- Phone and phone type
- Fax
- Website
- Email
- Address

## Custom company fields

You can create up to 100 custom fields for your company records. These custom company fields are independent of your custom contact fields and cannot be referenced with merge fields. Once a custom company field is created, you cannot change its type. [Learn more about custom field types.](#)

You can create, edit, and delete all your contact and company custom fields in the [custom fields management settings](#).

To create a new custom company field or add an existing one to a company record:

1. After accessing a company record, click **Edit**

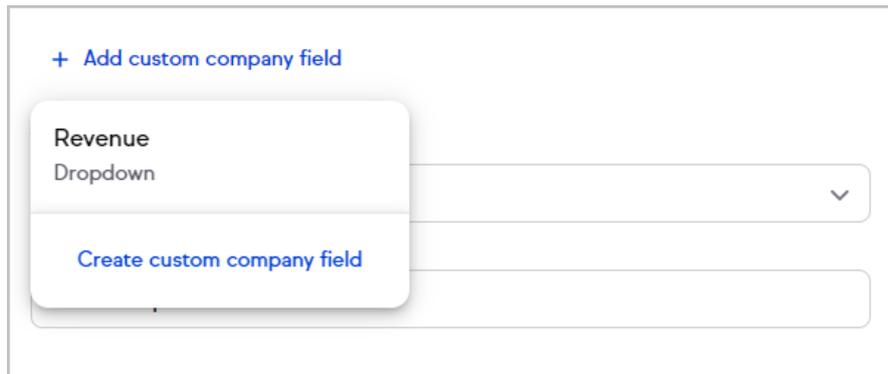
New

Keap Edit

Phone: Office  
(866) 800-0004

Website  
http://keep.com

2. Click **Add custom company field**
3. Select an existing custom company field or click **Create custom company field**

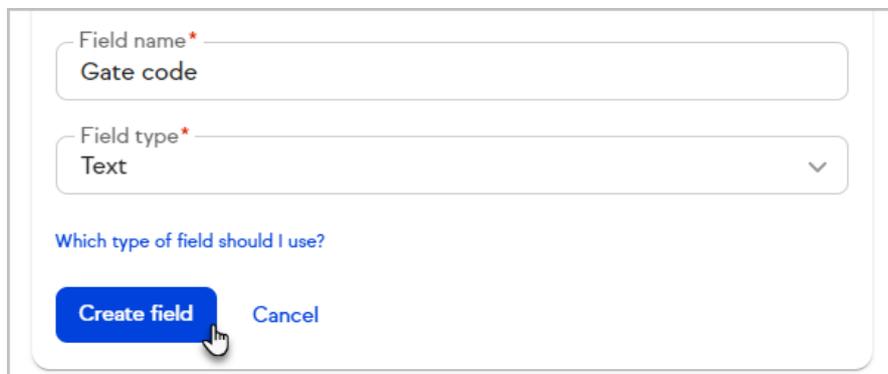


+ Add custom company field

Revenue  
Dropdown

Create custom company field

4. To create a field, enter a name, select a [type](#), configure the field as needed, and click **Create field**



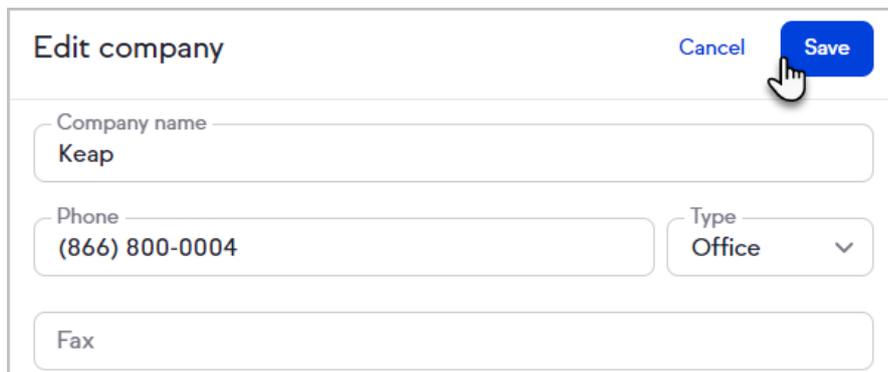
Field name\*  
Gate code

Field type\*  
Text

Which type of field should I use?

Create field Cancel

5. Enter the relevant information into the field
6. Click **Save**



Edit company Cancel Save

Company name  
Keap

Phone  
(866) 800-0004

Type  
Office

Fax

## Remove a custom company field from a single company record

Removing a custom company field will only impact the current company record. It will not remove the field from any other company records that contain the field.

1. After accessing a company record, click **Edit**

A screenshot of a company record in a CRM system. At the top right, there is a 'New' button with a dropdown arrow. Below it, the company name 'Keap' is displayed with a grid icon to its left. To the right of the name is an 'Edit' button, which is highlighted with a hand cursor. Below the name, the contact information is listed: 'Phone: Office (866) 800-0004' and 'Website http://keap.com'.

2. Click the menu button next to the custom company field you want to remove

A screenshot showing a list of custom company fields for the company 'Keap'. The fields are: 'Website http://keap.com', 'Email donotreply@keap.com', and 'Facebook page'. At the bottom left, there is a '+ Add custom company field' link. To the right of the 'Facebook page' field, there is a three-dot menu button, which is highlighted with a hand cursor.

3. Click **Reset field to default state**

A screenshot showing a context menu for a custom company field. The menu is open, showing three options: 'Edit custom company field' (with a pencil icon), 'Reset field to default state' (with a circular arrow icon), and 'Manage all custom fields' (with a gear icon). The 'Reset field to default state' option is highlighted with a hand cursor. The background shows a partial view of the 'Facebook page' field and a dropdown menu.

4. Click **Save**

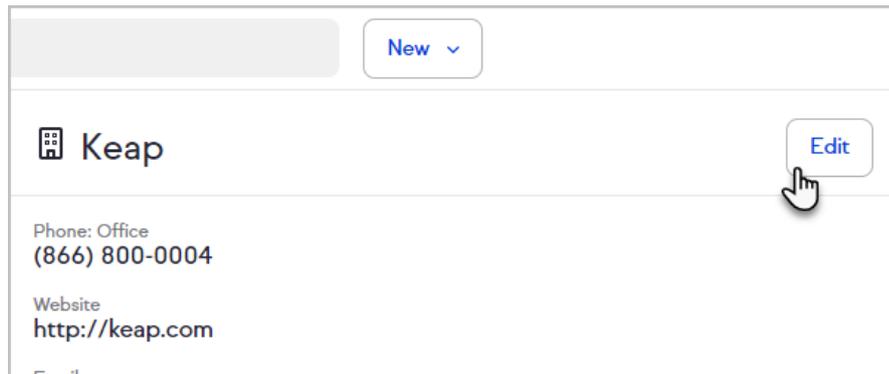
A screenshot of the 'Edit company' form. The form has a title 'Edit company' at the top left. At the top right, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a hand cursor. The form contains several input fields: 'Company name' with the value 'Keap', 'Phone' with the value '(866) 800-0004', 'Type' with a dropdown menu showing 'Office', and 'Fax'.

## Edit custom company fields

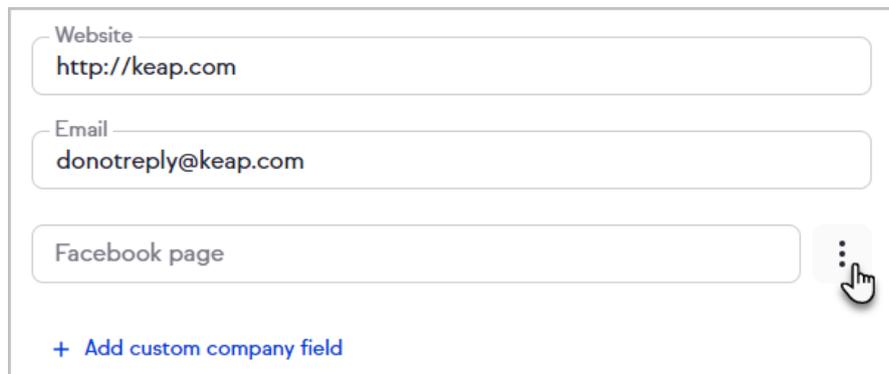
Editing a custom company field will edit it for all company records that contain the

field.

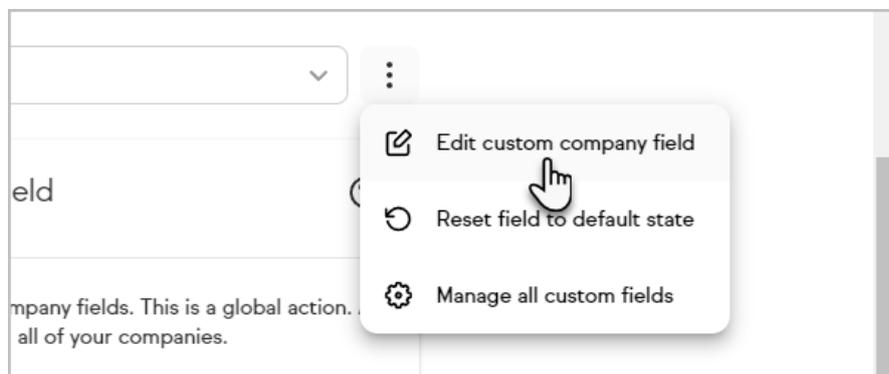
1. After accessing a company record, click **Edit**



2. Click the menu button next to the custom company field you want to edit



3. Click **Edit custom company field**

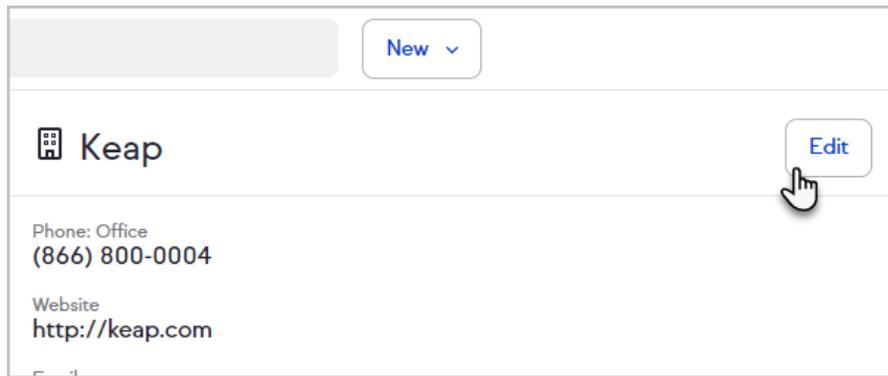


4. Edit the field
5. Click **Save field**

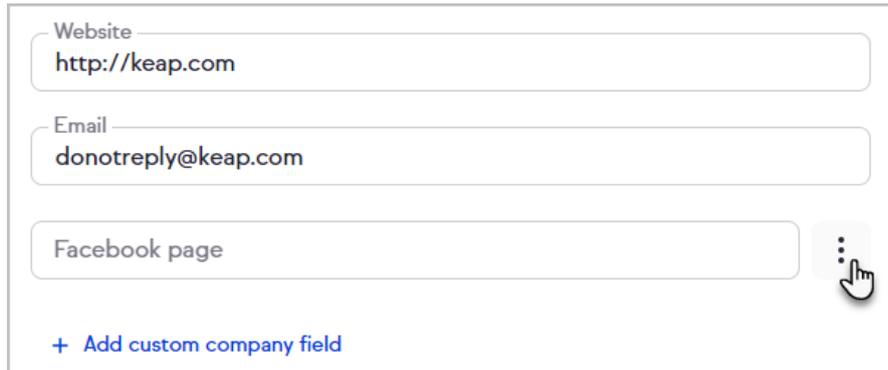
## Delete custom company fields

Deleting a custom company field will delete it and all associated data from any company record that uses the field.

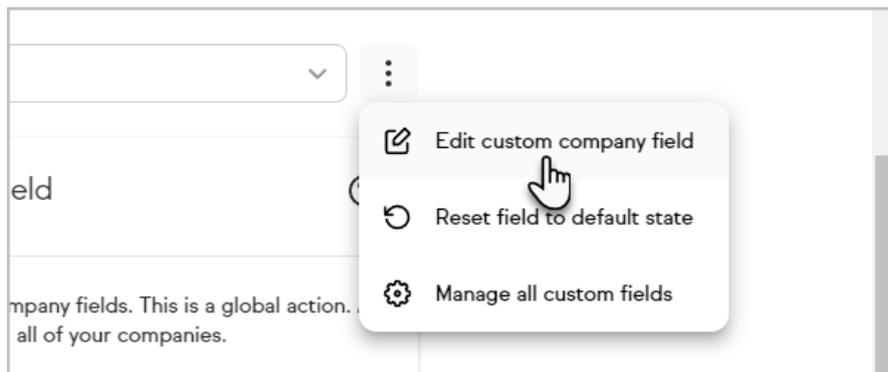
1. After accessing a company record, click **Edit**



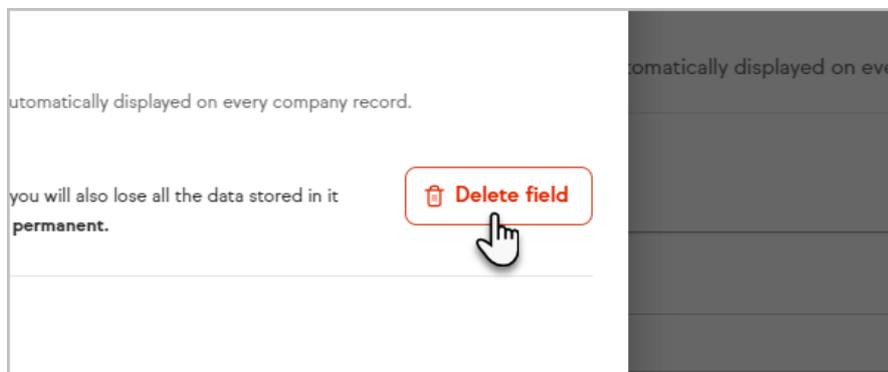
2. Click the menu button next to the custom company field you want to delete



3. Click **Edit custom company field**



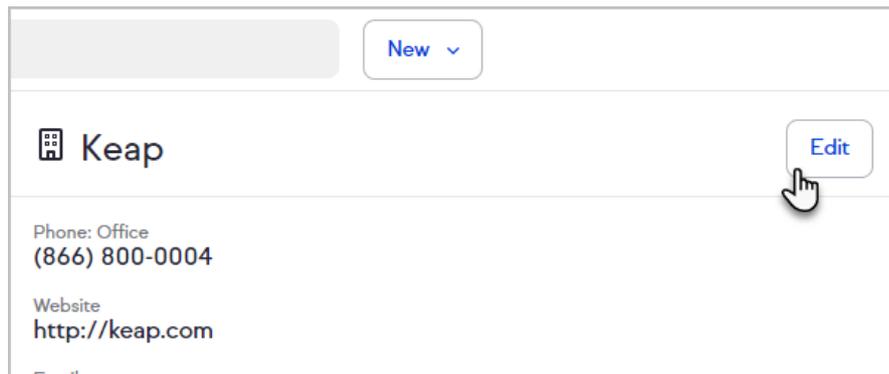
4. Click **Delete field**



5. Confirm that you want to delete the field and all stored data by clicking **Delete field**

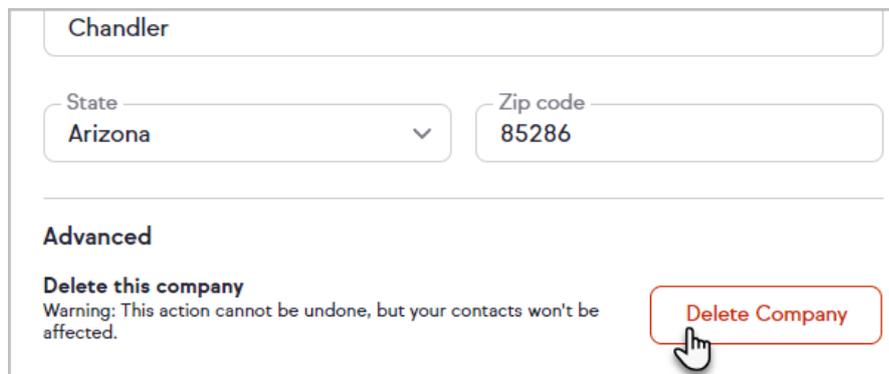
## Delete a company record

1. After accessing a company record, click **Edit**



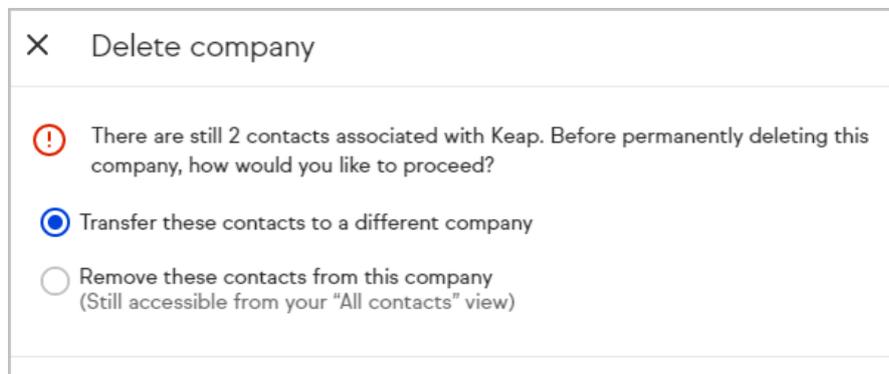
A screenshot of a company record for 'Keap'. At the top right, there is a 'New' dropdown menu. Below it, the company name 'Keap' is displayed with a small icon to its left. To the right of the name is an 'Edit' button, which is highlighted with a mouse cursor. Below the name, the contact information is listed: 'Phone: Office (866) 800-0004' and 'Website http://keap.com'.

2. Click **Delete company** at the bottom of the company record



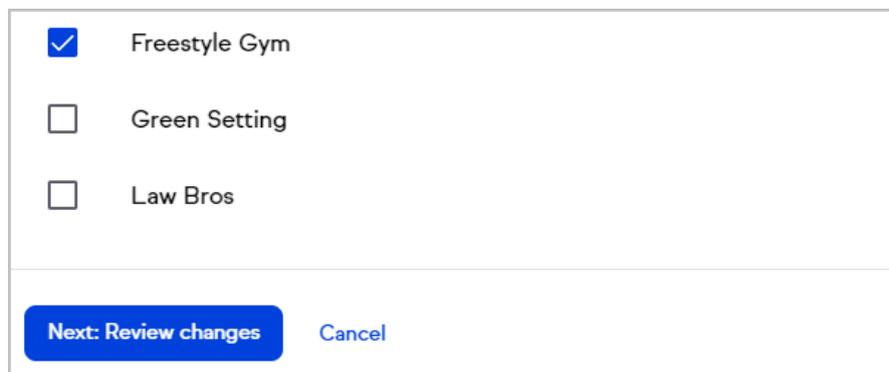
A screenshot of the company record form. The company name 'Chandler' is in a text field. Below it are two dropdown menus: 'State' set to 'Arizona' and 'Zip code' set to '85286'. Under the 'Advanced' section, there is a warning: 'Delete this company Warning: This action cannot be undone, but your contacts won't be affected.' To the right of this warning is a red 'Delete Company' button, which is highlighted with a mouse cursor.

3. If you have contacts associated with a company, you will be asked how to handle those contacts



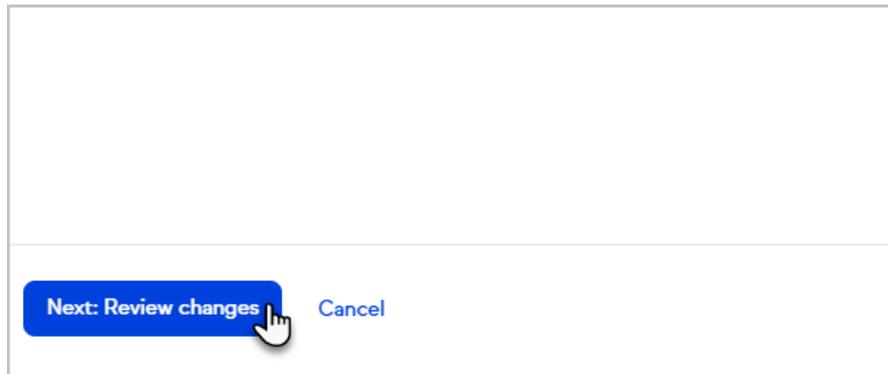
A screenshot of a dialog box titled 'Delete company'. It contains a warning icon and text: 'There are still 2 contacts associated with Keap. Before permanently deleting this company, how would you like to proceed?'. Below this are three radio button options: 'Transfer these contacts to a different company' (which is selected), 'Remove these contacts from this company (Still accessible from your "All contacts" view)', and an unselected option.

4. If you chose to transfer the contact(s), select a company to transfer contacts to

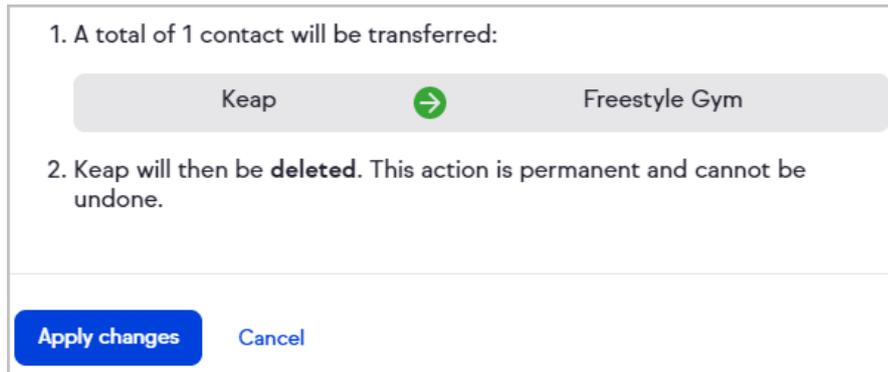


A screenshot of a dialog box for selecting a company to transfer contacts to. It lists three companies with checkboxes: 'Freestyle Gym' (checked), 'Green Setting' (unchecked), and 'Law Bros' (unchecked). At the bottom, there are two buttons: 'Next: Review changes' and 'Cancel'.

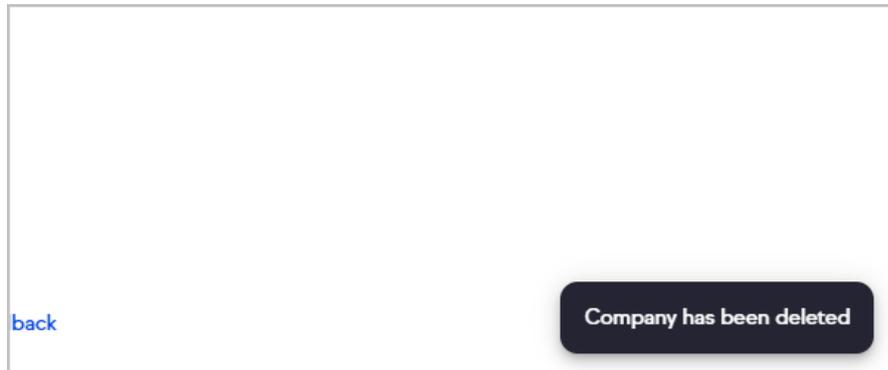
5. Click **Next: Review changes**



6. Confirm the changes by clicking **Apply changes**



7. The company will be deleted, removed from associated contacts, and a confirmation message will appear in the bottom right corner



## FAQs

### **Can you filter or segment by the company information?**

Not yet, but we are working to provide this capability soon.

### **Can you perform automation based on the company information?**

No, not at this time.

### **Are my custom company fields different than my custom contact fields?**

Yes. You have 100 custom company fields that are separate from your custom contact fields.

### **Are all the same custom field types available for custom contact fields available for custom company fields?**

Yes.

**Can I change the field type on a custom company field?**

No, once a field is created, the field type cannot be changed. This is also the case for custom contact fields, so always be sure you are using the right field type before you create your custom field.

**If I remove a custom company field from a company record, does it get rid of the field for all companies?**

No, the field will remain on any other companies it's been added to.

**If I delete a custom company field, will that remove it from all company records?**

Yes, deleting a field will remove the field and all stored data from all companies.

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