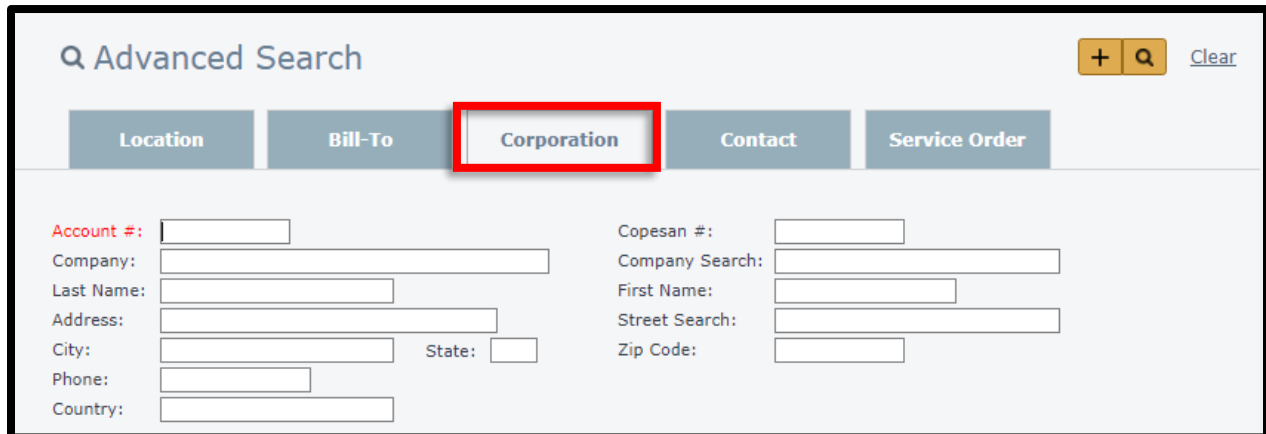


# Adding a Corporation

Why would you want to create a Corporation? This feature allows you to tie together various Locations (e.g., franchise) that share similar traits (e.g., name) but not necessarily a Bill-to. This document outlines how to set up a Corporation in PestPac.

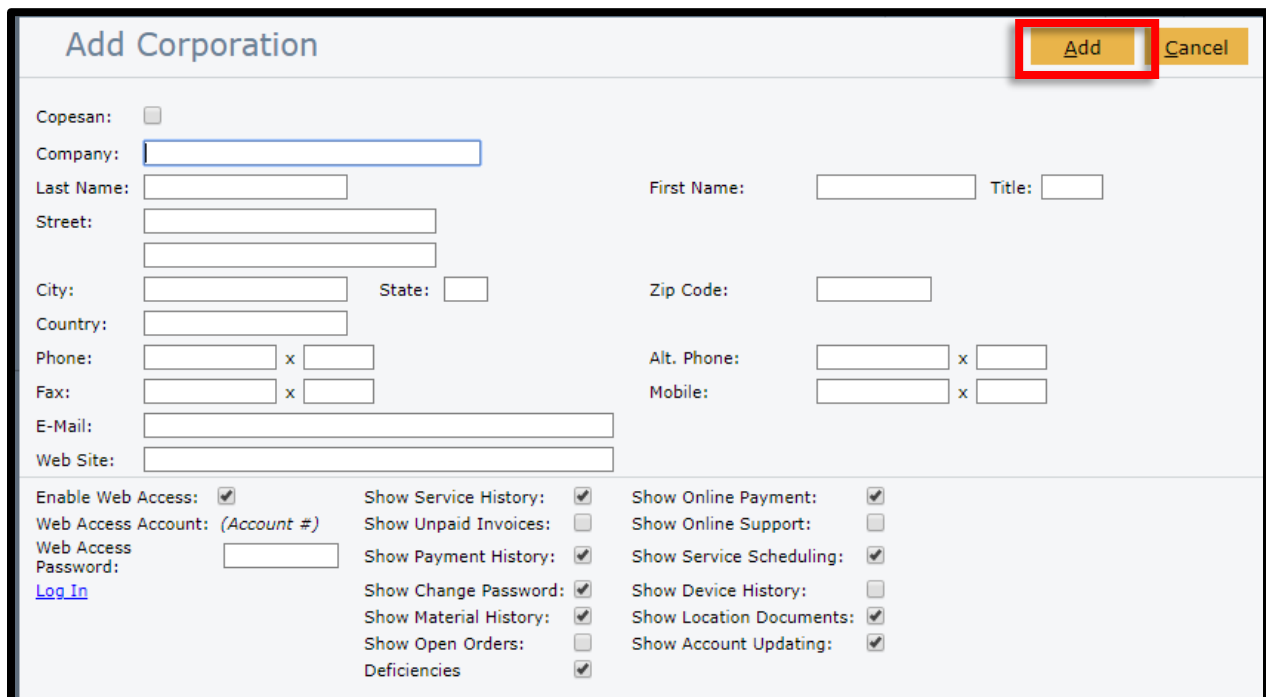
To add a corporation, complete the following steps:

1. From *Advanced Search*, select the Corporation tab, and click the + button.



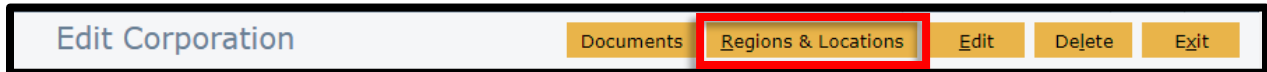
The screenshot shows the 'Advanced Search' interface. At the top, there is a search bar with a magnifying glass icon, a plus sign in a yellow box, and a 'Clear' link. Below the search bar are five tabs: 'Location', 'Bill-To', 'Corporation', 'Contact', and 'Service Order'. The 'Corporation' tab is highlighted with a red box. Below the tabs are two columns of input fields for search criteria. The left column includes: Account #, Company, Last Name, Address, City, State, Phone, and Country. The right column includes: Copesan #, Company Search, First Name, Street Search, and Zip Code.

2. Fill in the information for your Corporation, and click the *Add* button.

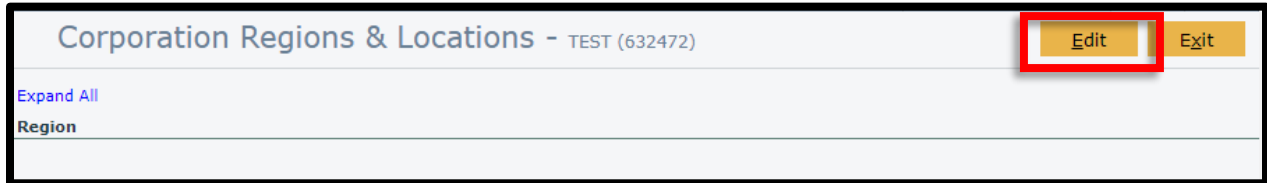


The screenshot shows the 'Add Corporation' form. At the top right, there is a yellow 'Add' button and a 'Cancel' button, with the 'Add' button highlighted by a red box. The form contains several input fields: Copesan (checkbox), Company, Last Name, Street, City, State, Country, Phone, Fax, E-Mail, and Web Site. There are also fields for First Name, Title, Zip Code, Alt. Phone, and Mobile. At the bottom, there is a section for enabling web access and showing various service history and account information, with checkboxes for each option. A 'Log In' link is also present.

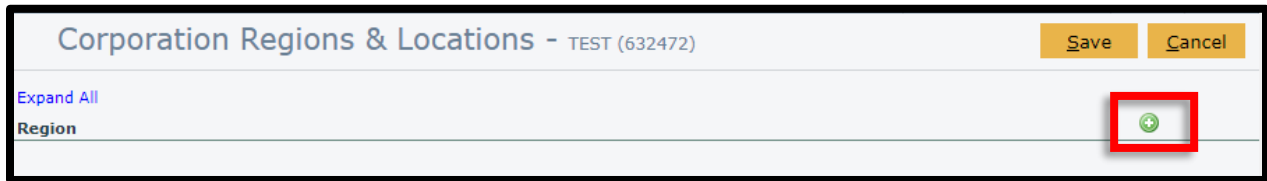
3. After adding the Corporation, you can edit it, including adding Regions and Locations, by clicking the *Regions and Locations* button.



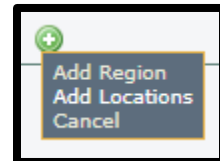
4. Click the *Edit* button.



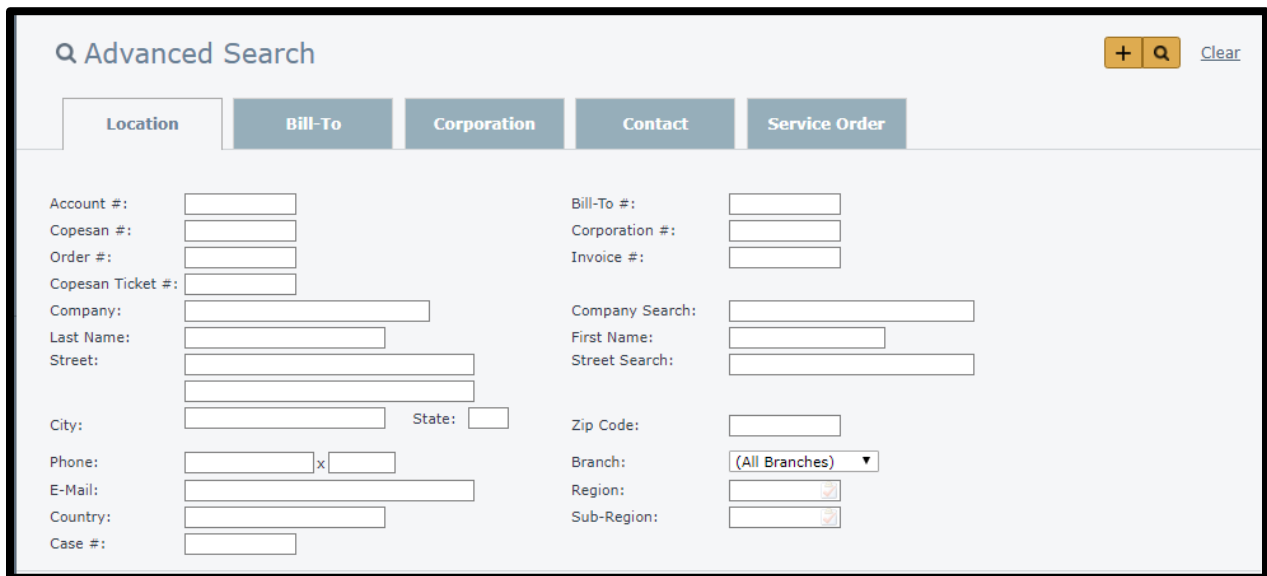
5. Click the green + button.



6. Add a Region or Location. In the following example, we will follow the additional steps to add Locations.



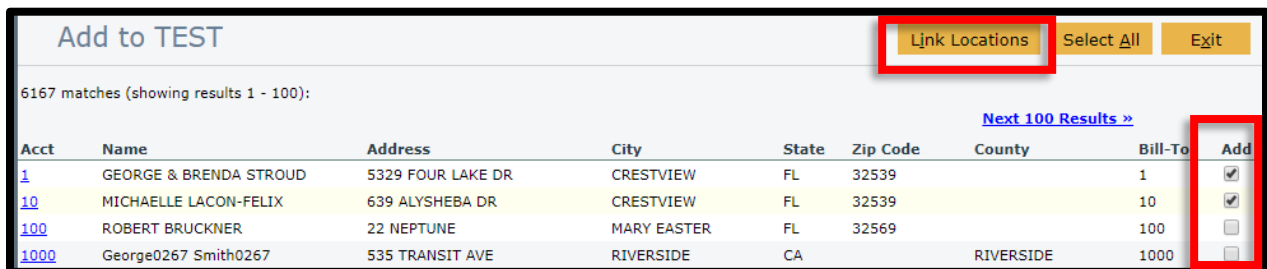
7. If you select Locations, PestPac will bring you to the *Advanced Search* screen. You can select the criteria for what Locations need to be attached (e.g., similar company name, same zip code, or same last name).



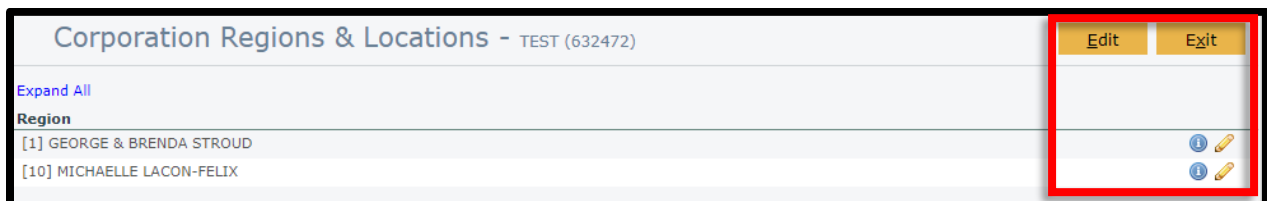
8. Click the *magnifying glass* button to search.



9. Check the Locations you want to add to the corporation, and click the *Link Locations* button.



10. You can edit the Regions, Locations, and Locations from the resulting screen.



REMEMBER: For additional setup, training, and usage resources, including live webinars and a robust video library, please visit [PestPac University](#).