User Company Editor

> This article describes how to create, edit, and manage company profiles within OPSCOM. The **User Companies** feature allows administrators to group individual users under a single corporate account, which helps to streamline permit management, billing, and reporting for business clients. This guide is intended for OPSCOM administrators.

Using This Feature

The primary setup step is creating the company profile. Once created, you can associate users with the company and assign specific roles.

To Create a New Company:

1. Go to **User Management** and click **User Companies**.
2. On the **Company Search** page, click the **Create New Company** button to open the **Company Create** window.
3. Fill in the company's information in the provided fields:
   - **Account Number**: A unique internal identifier for the company.
   - **Company Name**: The official name of the business.
   - **Address**: The physical address of the company.
   - **Contact Name**: The primary administrative contact for the company.
   - **Invoice Emails**: The email address where system-generated invoices should be sent.

4. Once all data is entered, click the **Add New Company** button. A confirmation message will appear indicating the company has been added.

After a company is created, you can search for it, manage its associated users, and archive it when it is no longer active.

Searching for a Company and Viewing Users

From the **Company Search** page, you can look up a company by its name or account number. The search results will display the company details and a count of its associated users.

- **Viewing Associated Users**: In the search results list, the number in the **Users** column is a clickable link. Clicking this number will redirect you to the **User Search** page, displaying a filtered list of all users assigned to that company. The list will also indicate which users are designated as the **Manager** or **Billing** contact.

Adding Users to a Company and Assigning Roles

1. Navigate to the profile of the user you wish to add to a company.
2. In the **Company** field, begin typing the company's name and select it from the drop-down list to link the user.
3. Assign roles using the following checkboxes:
    - **Company Manager**: Enable this checkbox to allow the user to access and view the profiles of other people within the same company.
    - **Company Billing Account**: Enable this checkbox to designate the user as the primary contact responsible for the company's payment

method. This user can pay for permits and violations for all users they manage.

4. Click **Submit** to save the changes.

Archiving a Company

1. From the **Company Search** page, find the company you wish to archive and click the **Edit** button.
2. On the **Company Edit** screen, click the **Archive** button in the top-right corner.

Best Practices & Considerations

- **Keep in mind:** A company **cannot be archived** if it has any users associated with it. You must first navigate to each user's profile and remove them from the company before the system will allow you to archive it.
- There can only be **one Company Billing Account** contact per company. If you attempt to assign this role to a second user, the system will prevent the change and display a message indicating who the current billing contact is.
- **Tip:** It is recommended to **establish the complete company profile first** before you begin associating users with it. This ensures all foundational details, like the invoice email and account number, are correctly in place from the start.
- The **Company Manager** role is a powerful tool for business-to-business clients, as it allows a primary contact to self-manage their employees' profiles. Be sure to clearly communicate this capability to your corporate contacts.

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