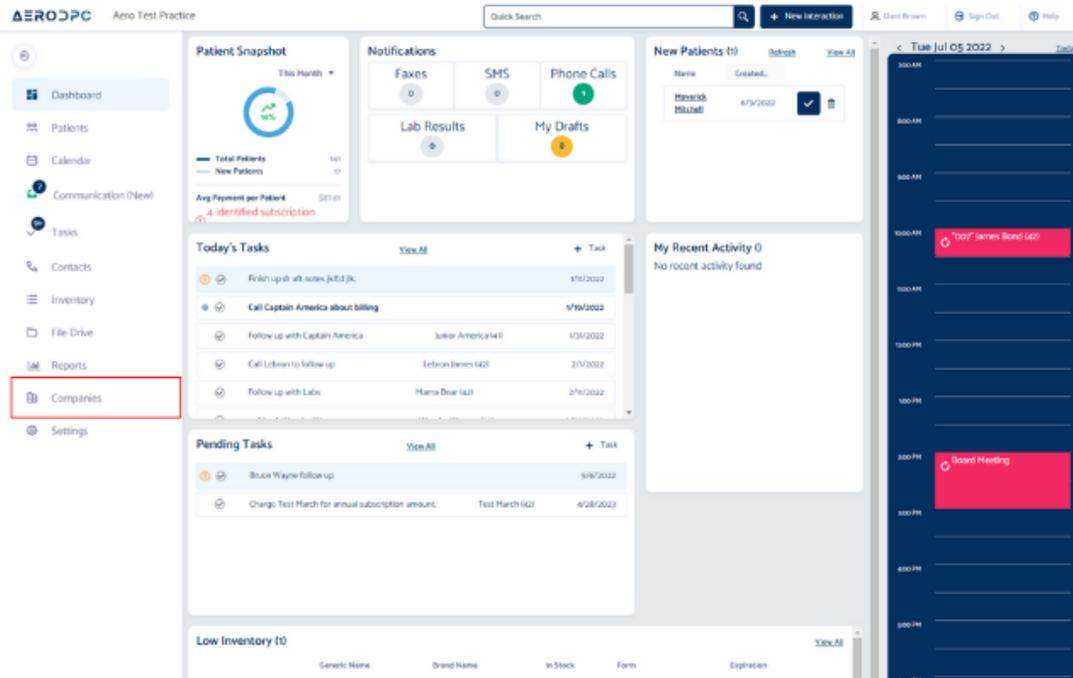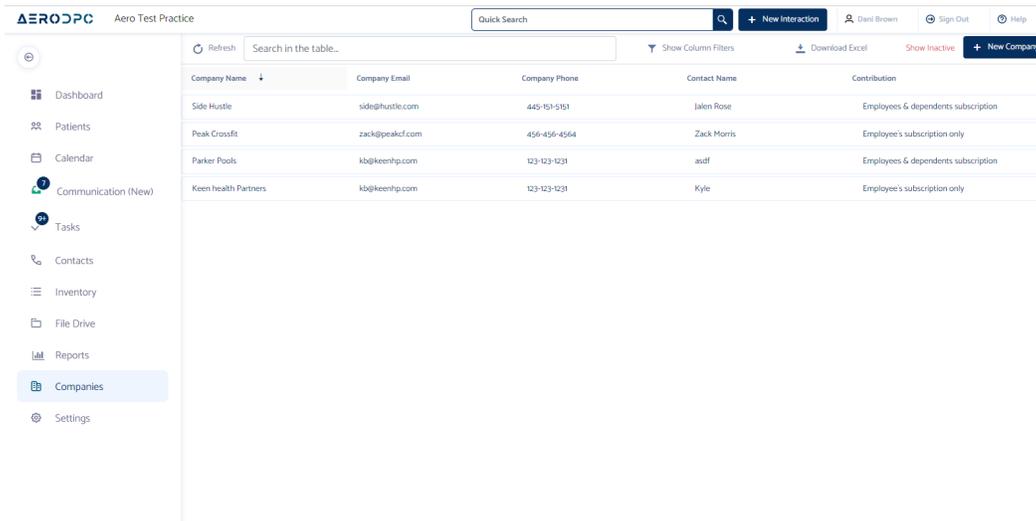# Adding a New Company

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1. Go to the "Companies" page by clicking the icon.

2. The companies page will show. This is where you manage all your companies that your clinic currently partners with.

3. Click "Add new company."

4. Enter in the required basic information for the company you'd like to add.

5. After entering in the company's basic information, select a "Contribution Type" based on your agreement with the company.

6. Once you are ready click "Save" This will create the company's profile. You will notice there is a notification next to the name of the new company. Click on the company's name to open up the company's profile.

8. The notification is reminding you that you do not yet have a payment method for the company yet.

9. Click the "Add first payment method" button to add an ACH or credit card.

10. Another option is to send the company contact a link to add their own payment method. The link is copied when you click the button, you can send it in an email or text.
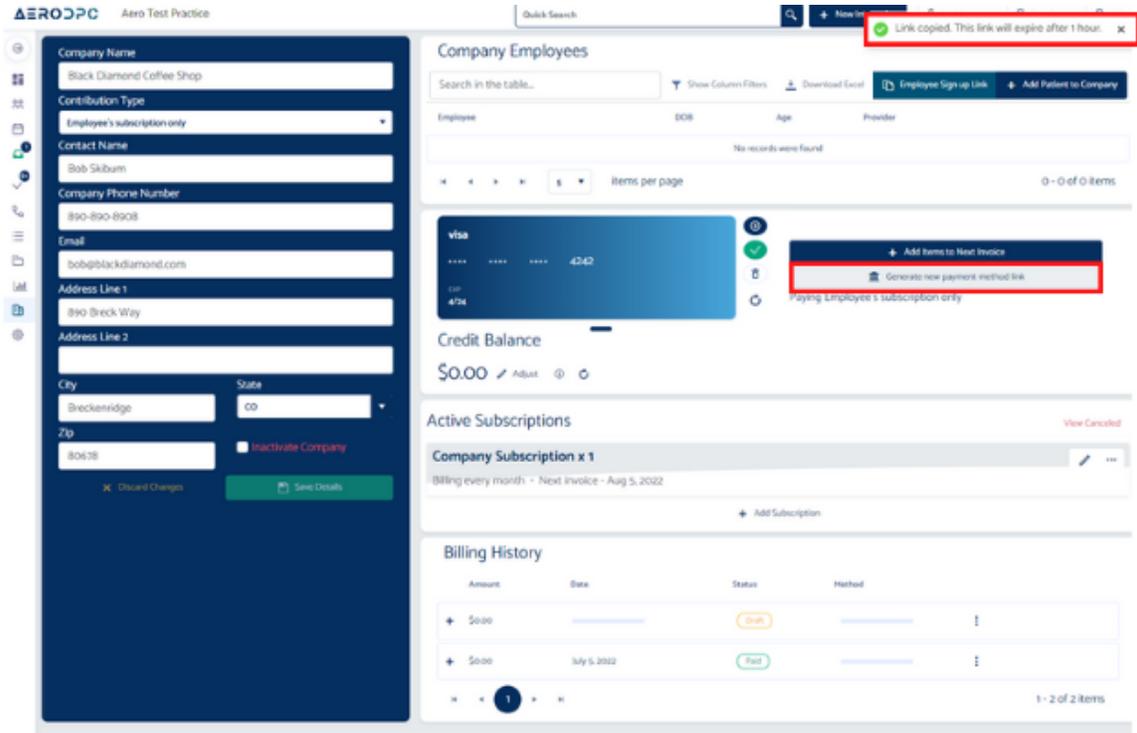
11. This is the screen they will see when they click the link.

Select Payment Method

Enter credit card here.

| Card number | MM / YY |

Powered by stripe

Pay with Credit Card

Select this method to connect your bank account.

Pay with a bank account
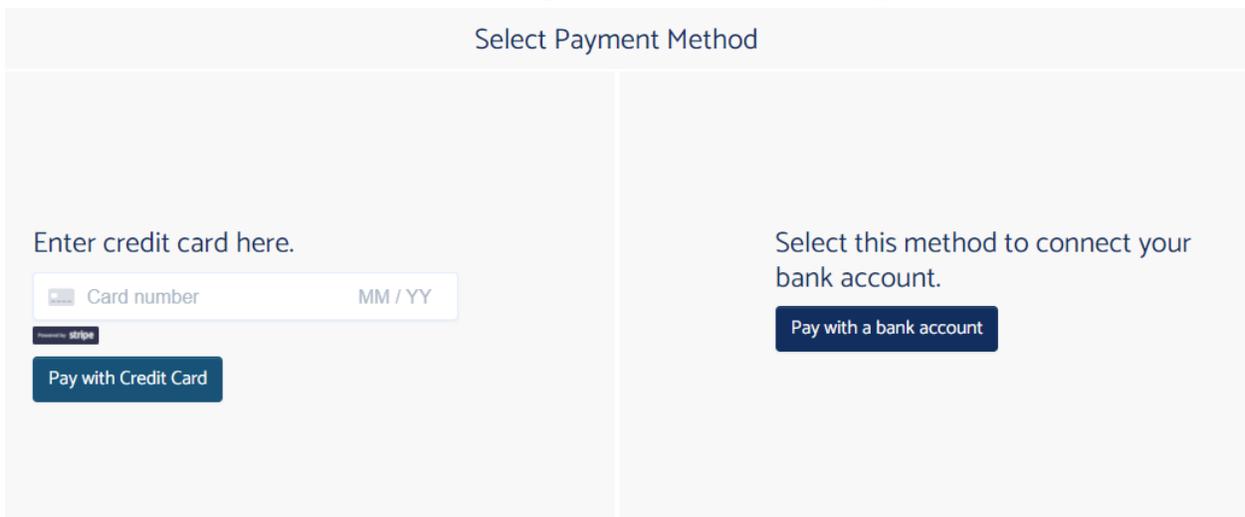
12. Once they enter payment info, you will see that on the company's profile.

13. This company is now ready for Employees. There are also two ways to add company employees. If all of the employees are new patients (not existing patients) you can send them the company specific sign up link.

14. Here is the screen the new patient will see from that link.

Employee Registration

It looks like you are trying to register with a practice as an employee of Peak Crossfit.

If that is that correct click the button below.

Click here for employee Registration

Normal Registration

If you just want to register without being associated to a company click the red button below.

Click here for normal Registration

15. The second option is to add existing patients to be employees of this new company.

16. You can choose from the drop down of your active patients.

Add Patient to Black Diamond Coffee Shop

"Rooster" Rooster Bradshaw (22)   ▼

Select the company subscription where the product will be added

[▼]   ✕

Save without updating billing

Cancel   💾 Add patient to company

17. Once you select the patient's name, you can select to add them to the company subscription.

Add Patient to Black Diamond Coffee Shop

"Rooster" Rooster Bradshaw (22)   ▼

Select the company subscription where the product will be added

Company Subscription x 1 -- paid for monthly with Default Payment Method   ▼

Product	Qty	Price	
Select Product ▼	1	-	🗑	✕
Note (shown on bill PDF)	"Rooster" Rooster	✕ Remove note	

+ Add Product

_____

Subscription Total $0.00

Save without updating billing

Cancel   💾 Add patient to company

18. Now select how much the company should be paying for the employee. You can choose from your product/subscription list.

Add Patient to Black Diamond Coffee Shop

"Rooster" Rooster Bradshaw (22) ▾

Select the company subscription where the product will be added

Company Subscription x 1 -- paid for monthly with Default Payment Method ▾

Product	Qty	Price	
Select Product ▾	1	-	🗑 ✕

🔍

"Rooster" Rooster ▾   ✕ Remove note

ABC 123 Membership Ages
0 - 18
$40.00 every month $0.00

Ages 19 - 45   ve without updating billing
$85.00 every month

Ages 46+   💾 Add patient to company
$105.00 every month

Company Lump Sum
$5,000.00 every month   View Canceled

Employee Subscription
$0.00 every month   ✏ ⋯

Family Membership
$350.00 every month

19. Once you are happy with that, click "Add Patient to Company" and you will see the patient added to the employee list.

Company Employees

Search in the table...	▼ Show Column Filters	⬇ Download Excel	🗗 Employee Sign up Link	＋ Add Patient to Company

Employee	DOB	Age	Provider	
"Rooster" Rooster Bradshaw	7/7/1999	22	-	🗑

|◄ ◄ **1** ► ►| 5 ▾   items per page   1 - 1 of 1 items

20. You can also add one-time charges or one lump sum to the company invoice. Nice work!