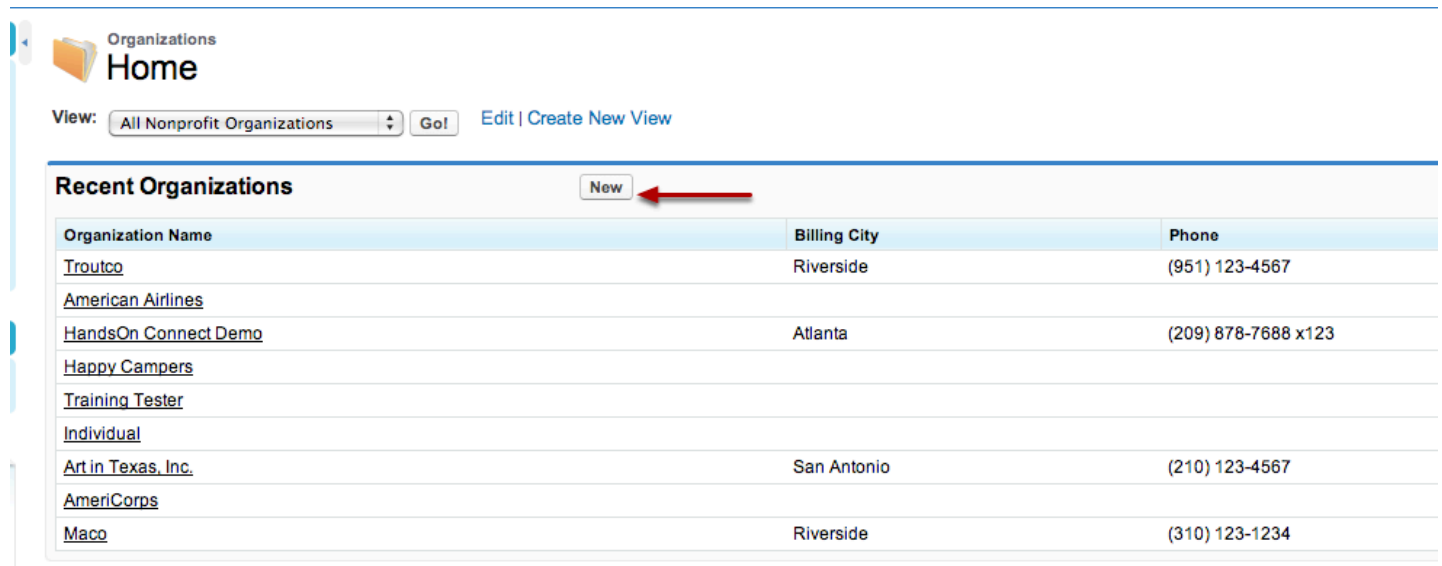


Creating a New Organization - (selecting the organization record type)

If you wanted to add a contact to the system from a business card, for an organization that isn't already in your database, the best practice would be to create the organization first.

That way - when you create the contact record, you'll be able to associate the contact with your newly created organization record.

To create a new organization record, click new from the Organization home page:




Organizations Home

View: All Nonprofit Organizations Go! Edit | Create New View

Recent Organizations [New](#)

Organization Name	Billing City	Phone
Troutco	Riverside	(951) 123-4567
American Airlines		
HandsOn Connect Demo	Atlanta	(209) 878-7688 x123
Happy Campers		
Training Tester		
Individual		
Art in Texas, Inc.	San Antonio	(210) 123-4567
AmeriCorps		
Maco	Riverside	(310) 123-1234

When you create a new organization record, you can choose whether they are a nonprofit or business record.

 New Organization

Select Organization Record Type

Select a record type for the new organization. To skip this page in the future, change your record type settings on your personal setup page.

Select Organization Record Type

Record Type of new record

Business

✓ Nonprofit

Continue

Cancel

Available Organization Record Types

Record Type Name	Description
Business	This record type is to be used to identify all for-profit organizations.
Nonprofit	This record type is to be used to identify all nonprofit organizations.

Select either "Business" or "Nonprofit" from the picklist and click Continue to create a new, blank organizational record.

As we mentioned earlier - there is also an "individual" organizational record type -- but its been hidden from you so you don't accidentally create a second organization of type "Individual"

Note: Be sure to never delete the record for the one organization named **Individual**.