

# Managing Entities

While on your main page (dashboard), navigate to the top of the screen and click "Entities".

From this page, you can search for entities that have already been created, or you can create or import new ones.

To create a new entity, click on "Add".

Fill out each field. This includes:

- Entity Name
- NAICS Code
- Owners
- Entity Type
- Tax Classification
- Entity Description
- Entity Email
- Entity Website URL
- DBAs
- Comments
- State
- Locality

You may also add a profile icon and any social links.

Choose if you want to add business details or not.

Regardless of choice, click "Save".

If you chose to add business details, on the next screen, fill out the fields

These are:

- Entity Stage
- Month and Year
- Target Market
- Chamber Link

Click "Save".

On the next screen, you can edit the entity, delete it, add tags, add phone numbers, add addresses, add a meeting, add comments/notes, create referrals, add provided services, add milestones, add staff positions, or add accessed capital.

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