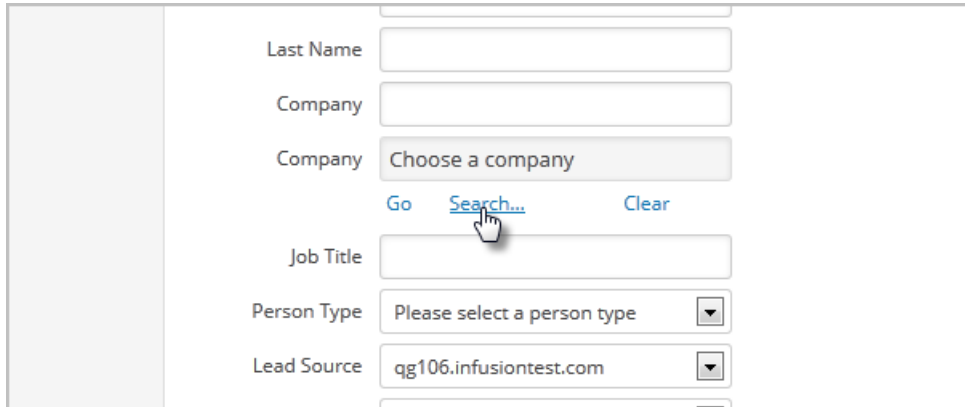


Assign a contact to a company

This article applies to:

Assign a Contact to a Company From a Contact Record

1. Open the contact record.
2. Click on **Search** to choose an existing company.



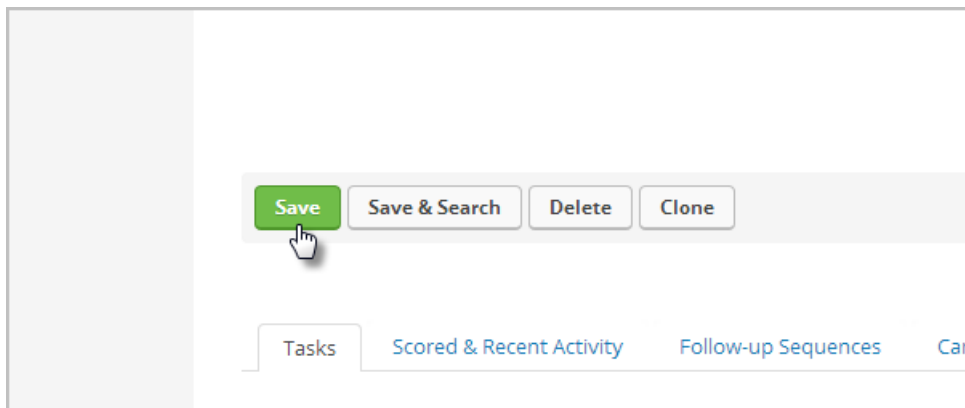
A screenshot of a contact record form. The form includes several input fields: 'Last Name', 'Company', 'Company' (with a dropdown menu showing 'Choose a company'), 'Job Title', 'Person Type' (with a dropdown menu showing 'Please select a person type'), and 'Lead Source' (with a dropdown menu showing 'qg106.infusiontest.com'). Below the 'Company' dropdown, there are three buttons: 'Go', 'Search...' (with a mouse cursor hovering over it), and 'Clear'.

3. Click the **Select** link next to the company that the contact should be assigned to. (Using the search capabilities may make it easier to find the company. Type all or part of the company name and click Search.)



7709	[Select]	Elit Pede LLC
7813	[Select]	Montes Nascetur Ridiculus Limited
7817	[Select]	Fermentum Metus Aenean Limited
7821	[Select]	Mauris Corporation
7825	[Select]	Dolor Corporation
7829	[Select]	Et Nunc Quisque LLC
7685	[Select]	Vehicula Corporation

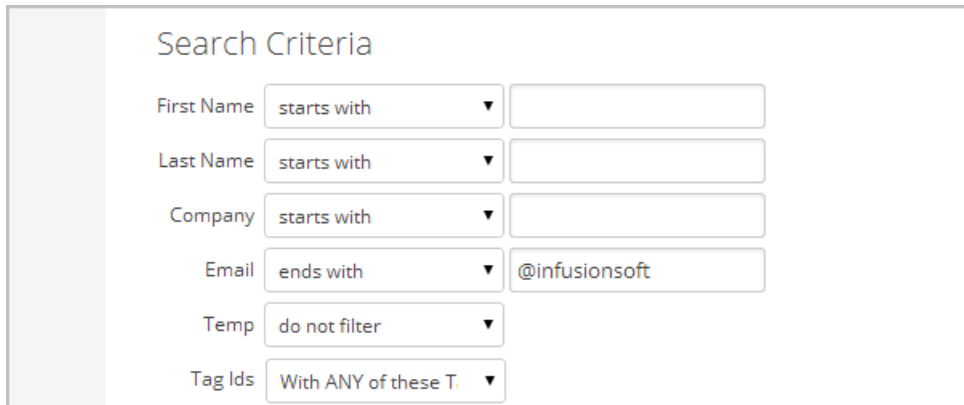
4. Click on the **Save** button to apply the update.



A screenshot of a contact record form showing a row of buttons: 'Save', 'Save & Search', 'Delete', and 'Clone'. A mouse cursor is hovering over the 'Save' button. Below the buttons, there are several tabs: 'Tasks', 'Scored & Recent Activity', 'Follow-up Sequences', and 'Car'.

Assign a Contact to a Company From a *Company* Record

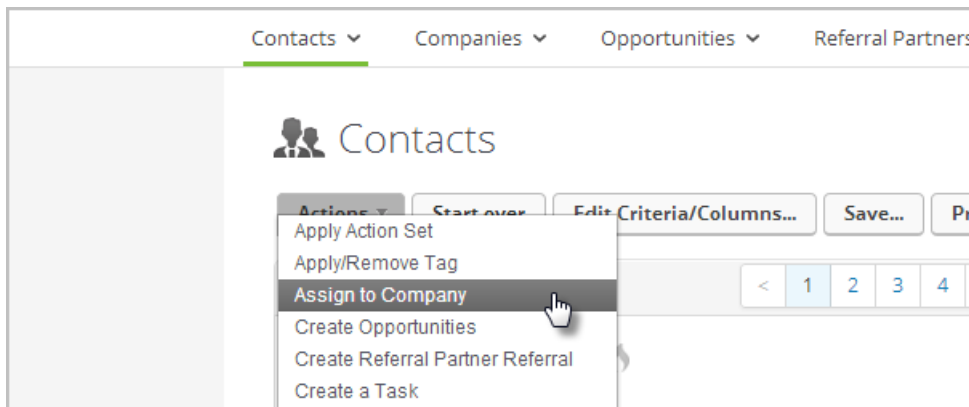
1. Do a contact search from CRM > **Contacts** by entering the search criteria (company name, email address, etc.) for the contacts that should be assigned to a company.



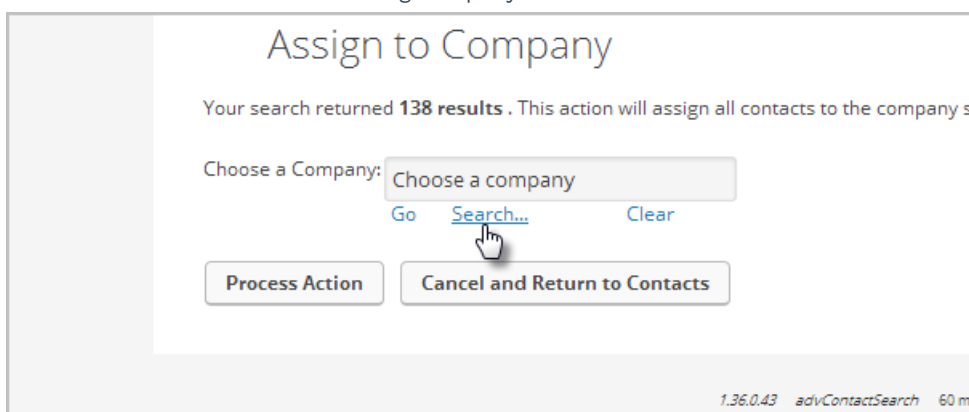
The screenshot shows a 'Search Criteria' form with the following fields and values:

- First Name: starts with []
- Last Name: starts with []
- Company: starts with []
- Email: ends with [@infusionsoft]
- Temp: do not filter
- Tag Ids: With ANY of these T. []

2. Review the list and mark the check-boxes for the contacts that should be assigned to the company.
3. Click on the **Actions** button and select **Assign to Company**.



4. Click on **Search** to choose an existing company.



The screenshot shows the 'Assign to Company' dialog box. It displays the message: 'Your search returned **138 results**. This action will assign all contacts to the company s'. Below this, there is a 'Choose a Company:' label and a search input field containing 'Choose a company'. There are 'Go', 'Search...', and 'Clear' buttons. At the bottom, there are 'Process Action' and 'Cancel and Return to Contacts' buttons. The footer of the dialog box shows '1.36.0.43 advContactSearch 60 m'.

5. Click on the **Process Action** button.

Assign to Company

Your search returned **138 results** . This action will assign all contacts to th

Choose a Company:
[Go](#) [Search...](#) [Clear](#)

Process Action

Cancel and Return to Contacts

