Create or edit your organization’s profile in Primary Record

Manage a Professional Account · https://www.primaryrecord.com/docs/create-or-edit-your-organizations-profile-in-primary-record/

When you sign into Primary Record for the first time as an organization, you’ll set up your organization’s profile information.

Important: The public visibility toggle is required to show the organization name, description, and logo during the client invitation process.

1. On a mobile device or computer, open a browser, and sign into Primary Record.
2. Add your organization’s profile info: Logo, name, avatar, description, address, phone number, email, fax, or website.
3. Click **Save**.

Edit information: You can go edit your organization’s information anytime by clicking your organization’s name in the top right corner.