



# Link Company Representative

To link a company representative to the company:

*NOTE: Users must have a 'Professional Account' and linked to the company as their Official Representative.*

- 1) Navigate to EFIS.
- 2) Click the **Log In** link located in the *Header Links* in the upper, right-hand corner.



- 3) In the **Email Address** field, input the user's email address registered with their user account.
- 4) In the **Password** field, input the user's password.
- 5) Click the **Log In** button.

## OPTION 1

- 1) Select the 'Company & User Management' tab.



- 2) Select the 'Company Search' link.

- 3) Input the applicable search criteria.
- 4) Select the **Search** button; or click the **Clear** button to clear all fields and start over.



# Link Company Representative

**Company Search**

Search Criteria Help

Utility Type (Select)	Company Type (Select)	Company <input type="text"/>	EFIS Company Status Both
Email Address <input type="text"/>		Address 1234 Main St	City <input type="text"/>
Zip <input type="text"/>	Country (Select)	Phone Number <input type="text"/>	State (Select)
		Certification/Registration Status (Select)	

- 6) A list of companies matching the search criteria will be displayed below the Search button.
- 7) Click on the company name in the **Company** column to view the company's information.

Search complete. The results are displayed below.

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Company	Utility Type	Email	Address	Phone Number	EFIS Company Status	Certification/Registration	Parent Company	Doing Business As
<a href="#">Algonquin Power Company</a>	Electric Company Type: Independent Power Producer		2845 Briston Circle Oakville, Ontario L6H 7H7 Canada (Primary)	Fax: (905) 465-4514 Work: (905) 465-4531	Open	Not Certified		
<a href="#">Ameren Illinois Company</a>	Electric Company Type: Investor		300 Liberty Peoria, IL 61602 (Primary)	Toll Free: (800) 755-5000	Open	Not Certified		

- 8) In the *Representatives* section, click the **Add Company Representative** button.

Representatives Add Company Representative

Representative Type	Name	Address	Email Address	Phone
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- 9) The **Name** field will auto populate to the user's name.
- 10) The **Company** field will auto populate to the company in which the user is requesting to be linked to.
- 11) In the **Representative Type** field, select the type of representative from the drop-down list.
- 12) In the **Address** field, select the address from the drop-down list.
  - a) If the address is listed, skip to the next numerical step.
  - b) If the address isn't listed, click the **Add New** button below the field.

**Link Representative to Company** Help

Items with an orange left border ( ) are required.

<b>Name</b>	User, Professional
<b>Company</b>	<a href="#">Algonquin Power Company (Electric) (Independent Power Producer)</a>
<b>Representative Type</b>	(Select)



## Link Company Representative

- i) In the **Address Line 1** field, input the street and/or mailing address of the company.
- ii) In the **Address Line 2** field, input an apartment, studio, or floor number, if applicable.
- iii) In the **City** field, input the name of the city.
- iv) In the **State** field, select the name of the state from the drop-down list.

*NOTE: This field defaults to 'United States of America'.*

- v) In the **Zip** field, input the zip code.
- vi) In the **County** field, select the name of the county from the drop-down list.
- vii) In the **Country** field, select the name of the country from the drop-down list.

*NOTE: This field defaults to 'United States of America'.*

- viii) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

### Add Address ✕

**Address Line 1**

**Address Line 2**

**City**

**State**

**Zip**

**County**

**Country**

- 13) In the **Email Address** field, select the email address from the drop-down list.
  - a) If the email address is listed, skip to numerical step.
  - b) If the email address is not listed, click the **Add New** button to add a new address.



## Link Company Representative

Email Address (Select) + Add New

- i) In the **Email Address** field, input the email address.
- ii) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

Add Email Address X

Email Address email@provider.com

Submit Clear

- 14) In the **Phone** field, select the applicable phone number from the drop-down list.
  - a) If the phone number is listed, skip to numerical step.
  - b) If the email address is not listed, click the **Add New** button to add a new address.

Phone (Select) + Add New

- i) In the **Phone Type** field, select the type of phone from the drop-down list.
- ii) For the **Is International** checkbox, check the box if the phone number is an international number.
- iii) In the **Number** field, input the phone number with area code.
- iv) In the **Extension** field, input an extension if needed.
- v) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.



# Link Company Representative

15) After all fields have been completed, click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

16) A notification will be displayed at the top of the page letting the user know the company representative record has been successfully added.

## OPTION 2

1) Select the 'Company & User Management' tab.

2) Select the 'Link Representative to Company' link.



## Link Company Representative

A screenshot of a web application menu titled "Company & User Management". The menu contains four items: "Company Search", "Create Company Profile", and "Link Representative to Company". The "Link Representative to Company" item is circled in orange.

- 3) The user's name should auto populate in the **Name** field.
  - a) If the user is linking themselves as a company representative, skip to the next numerical step.

A screenshot of the "Link Representative to Company" form. The form has a title bar with a "Help" button. Below the title bar is a light blue banner that reads "Items with an orange left border ( ) are required." The form contains three input fields: "Name" with a "Find" button and the text "User, Professional"; "Company" with the placeholder text "Begin typing for suggestions"; and "Representative Type" with a dropdown menu showing "(Select)". At the bottom of the form are two buttons: "Submit" and "Clear".

- b) If the user is needing to link another user as a company representative, click the **Find** button.
      - i) In the **Name** field, input the user's name.
      - ii) Click the **Search** button to search for the user or click the **Clear** button to clear all fields and start over.
      - iii) Click the **Select** button in front of the user needing to be linked.



# Link Company Representative

### Person Search

Search Criteria ▾

<b>Name</b>	<b>Address</b>
Professional <input type="text"/> Middle <input type="text"/>	Address Line <input type="text"/>
Attorney <input type="text"/>	City <input type="text"/>
	(Select State) ▾

Search complete. The results are displayed below.

	Name	Address	Is Attorney
<input type="button" value="Select"/>	Attorney, Professional	123 East Street Jefferson City, MO 65101	No

- 4) In the **Company** field, select the applicable company from the drop-down list. *Please note the company list will only include companies in which the Official Representative is linked to as the Official Representative.*

Company

- 5) In the **Representative Type** field, select the type of representative from the drop-down list.
- 6) In the **Address** field, select the address from the drop-down list.
  - a) If the address is listed, skip to the next numerical step.
  - b) If the address isn't listed, click the **Add New** button below the field.

Representative Type

Address

- ix) In the **Address Line 1** field, input the street and/or mailing address of the company.
- x) In the **Address Line 2** field, input an apartment, studio, or floor number, if applicable.
- xi) In the **City** field, input the name of the city.



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xii) In the **State** field, select the name of the state from the drop-down list.

*NOTE: This field defaults to 'United States of America'.*

xiii) In the **Zip** field, input the zip code.

xiv) In the **County** field, select the name of the county from the drop-down list.

xv) In the **Country** field, select the name of the country from the drop-down list.

*NOTE: This field defaults to 'United States of America'.*

xvi) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

**Add Address** [x]

Address Line 1: 1234 Main St

Address Line 2: Apartment, studio, or floor

City: City

State: Missouri

Zip: Zip

County: (Select)

Country: United States of America

Submit Clear

7) In the **Email Address** field, select the email address from the drop-down list.

a) If the email address is listed, skip to next numerical step.

b) If the email address is not listed, click the **Add New** button to add a new address.

Email Address: (Select)

+ Add New

i) In the **Email Address** field, input the email address.





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- ii) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

Add Email Address

Email Address

- 8) In the **Phone** field, select the applicable phone number from the drop-down list.
  - a) If the phone number is listed, skip to the next numerical step.
  - b) If the email address is not listed, click the **Add New** button to add a new address.

Phone (Select)

- i) In the **Phone Type** field, select the type of phone from the drop-down list.
- ii) For the **Is International** checkbox, check the box if the phone number is an international number.
- iii) In the **Number** field, input the phone number with area code.
- iv) In the **Extension** field, input an extension if needed.
- v) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.

Add Phone

Phone Type (Select)

Is International

Number (000) 000-0000

Extension 0000

- 9) After all fields have been completed, click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.



## Link Company Representative

10) A notification will be displayed at the top of the page letting the user know the company representative record has been successfully added.

Company representative record successfully added.

Company Representative Display

*For additional assistance, please contact the Data Center at (573) 751-7496 or [dcsupport@psc.mo.gov](mailto:dcsupport@psc.mo.gov).*