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.

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.

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

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.

  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.

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.

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.

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.

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

Submit   Clear

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.

Submit   Clear

16) 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   🖨 Print   ✏ Edit   🗑 Close   ❓ Help

OPTION 2

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

Company & User Management ▾	Agenda ▾	Case e-Filings & Search ▾	Utility Compliance e-Filings & Search ▾	Consumer Resources ▾	Reports & Misc. Resources ▾

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

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.

   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.

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.*

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.

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.

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.

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.

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   ✕

Email Address   email@provider.com

Submit   Clear

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)   ⌄
             ＋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.

Add Phone   ✕

Phone Type   (Select)   ⌄

Is International   ☐

Number   (000) 000-0000

Extension   0000

Submit   Clear

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.

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

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