



Create Company Profile

To create a company profile in EFIS:

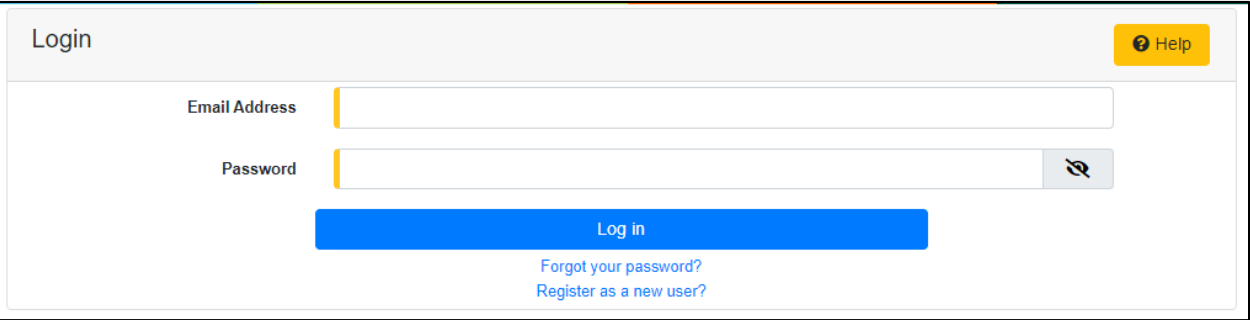
NOTE:

- ☑ Users must have a 'Professional Account'.
- ☑ Users should verify that the company does not already exist in EFIS. To verify, see Company Search.

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



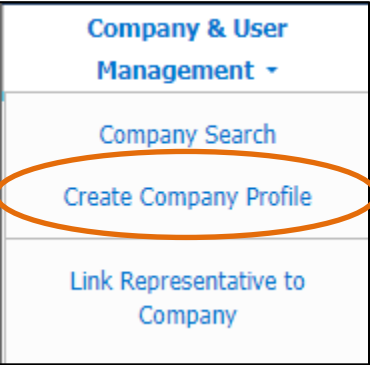
- 3) In the **Email Address** field, input the user's email address registered with their user account.
- 4) In the **Password** field, input the user's password.
- 5) Click the **Log In** button.



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



- 7) Select the 'Create Company Profile' link.



- 8) On the *Create Company Profile* page, complete the following information:
 - a) In the **Company** field, input the company name.



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- b) If the company has a parent company, input the parent company name in the **Parent Company** field.

NOTE: The Parent Company must be created first.

- c) In the **Utility Type** field, select the applicable type of utility from the drop-down list. Once this field has been completed, additional fields will display.
- d) In the **Company Type** field, select the applicable type of company from the drop-down list.

- 9) In the **Address** section, click the **Add New** button to add a company address.

- 10) On the **Add Address** input screen, complete the following information:

- a) For the **Primary** checkbox, uncheck the box only if the address entered will not be the primary address of the company.

NOTE: If the address is not the primary address, a primary address must be added to complete the creation of the company profile.

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

NOTE: This field defaults to 'Missouri'.

- f) In the **Zip** field, input the zip code.
- g) In the **County** field, select the name of the county from the drop-down list.



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

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

- i) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.
- j) Repeat steps 6 & 7 if an additional address is needed.

Add Address ✕

Primary

Address Line 1

Address Line 2

City

State

Zip

County

Country

11) In the *Email Address* section, click the **Add New** button to enter an email address.

Email Address

12) On the *Email Address* input screen, complete the following information:

- a) In the **Email Address** field, input the company's email address.
- b) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.
- c) Repeat steps 8 & 9 if an additional email address is needed.



The screenshot shows a dialog box titled "Add Email Address" with a close button (X) in the top right corner. Below the title bar is a light blue instruction box: "Please enter an email address belonging to the company being registered. This field is not intended for personal email addresses." Below this is a text input field labeled "Email Address" containing the text "email@provider.com". At the bottom of the dialog are two buttons: "Submit" (blue) and "Clear" (white with blue border).

13) In the *Phone* section, click the **Add New** button to add a phone number.

The screenshot shows a section titled "Phone" with a light gray background. Below the title is a white input area. At the bottom center of this area is a green button with a white plus sign and the text "+ Add New".

14) On the *Phone* input section, complete the following information:

- a) In the **Phone Type** field, select the applicable type of phone from the drop-down list.
- b) For the **Is International** checkbox, check the box if the phone number is an international number.
- c) In the **Number** field, input the phone number with area code.
- d) In the **Extension** field, input an extension if needed.
- e) Click the **Submit** button after all fields have been completed; or click the **Clear** button to clear all fields and start over.
- f) Repeat steps 10 & 11 if an additional phone number is needed.



Add Phone ✕

Phone Type

Is International

Number

Extension

15) In the *Representative* section, complete the following information:

- a) In the **Representative Type** field, select the type of company representative the user is from the drop-down list.

NOTE: This field defaults to 'Official Representative'.

- i) If the type of representative selected is not the Official Representative, the user will need to complete step 12 to select the Official Representative before completing the company profile.

Representative

Name

Representative Type

b) In the **Address** field, select the address from the drop-down list.

- i) If the address is listed, skip to step 12)c).
- ii) If the address is not already listed in the drop-down list, click the **Add New** button to add a new address.

Address

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



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

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

(5) In the **Zip** field, input the zip code.

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

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

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

(8) 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

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

i) If the email address is listed, skip to step 12)d).

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

Email Address

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



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

The screenshot shows a modal window titled "Add Email Address" with a close button (X) in the top right corner. Below the title is a label "Email Address" followed by a text input field containing the placeholder text "email@provider.com". At the bottom of the form are two buttons: "Submit" (a solid blue button) and "Clear" (a white button with a blue border).

- d) In the **Phone** field, select the applicable phone number from the drop-down list.
 - i) If the phone number is listed, skip to step 13.
 - ii) If the phone number is not listed, click the **Add New** button to add a new phone number.

The screenshot shows a form field labeled "Phone". It consists of a drop-down menu with the text "(Select)" and a downward arrow. Below the drop-down menu is a green button with a white plus sign and the text "+ Add New".

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

The screenshot shows a modal window titled "Add Phone" with a close button (X) in the top right corner. Below the title are four form fields: "Phone Type" (a drop-down menu with "(Select)" and a downward arrow), "Is International" (a checkbox that is currently unchecked), "Number" (a text input field with the placeholder "(000) 000-0000"), and "Extension" (a text input field with the placeholder "0000"). At the bottom of the form are two buttons: "Submit" (a solid blue button) and "Clear" (a white button with a blue border).

- 16) In the *Official Representative* section, complete the following information:
 - a) In the **Name** field, select the **Find** button to select the Official Representative of the company.



Official Representative

Please list the Official Representative who will be responsible for maintaining Company's/Firm's contact information.

Name Find

Representative Type Official Representative

- b) In the *Person Search* input screen, input the applicable criteria to find the correct Official Representative.

NOTE: This user must have a 'Professional Account' already established in EFIS.

- c) Click the **Search** button.

Person Search

Search Criteria ▾

Name

First Middle Last

Address

Address Line City (Select State) ▾

Search Clear

- d) A list of users will be displayed at the bottom of the *Person Search* input screen.
 - i) Select the applicable user by clicking the **Select** button beside the user's name.



Person Search ×

Search Criteria ▾

Name		Address
Official	Middle	Address Line
Representative		City
		(Select State) ▾

Search complete. The results are displayed below.

Search Clear

	Name	Address	Is Attorney
Select	Representative, Official	123 East Street Jefferson City, MO 65101	No

- e) In the **Address** field, select the address from the drop-down list.
 - i) If the address is listed, skip to step 13)f).
 - ii) If the address is not already listed in the drop-down list, click the **Add New** button to add a new address.

Address (Select) ▾

+ Add New

- (1) In the **Address Line 1** field, input the street and/or mailing address of the company.
- (2) In the **Address Line 2** field, input any apartment, studio, or floor number.
- (3) In the **City** field, input the name of the city.
- (4) In the **State** field, select the name of the state from the drop-down list.

NOTE: This field defaults to 'Missouri'.

- (5) In the **Zip** field, input the zip code.
- (6) In the **County** field, select the name of the county from the drop-down list.
- (7) In the **Country** field, select the name of the country from the drop-down list.

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



- (8) 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]

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

Email Address: (Select)

[+ Add New]

- (1) In the **Email Address** field, input the email address.
- (2) 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

Submit Clear

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

Phone (Select)

- (1) In the **Phone Type** field, select the type of phone from the drop-down list.
- (2) For the **Is International** checkbox, check the box if the phone number is an international number.
- (3) In the **Number** field, input the phone number with area code.
- (4) In the **Extension** field, input an extension if needed.
- (5) 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

- 17) 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.



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