







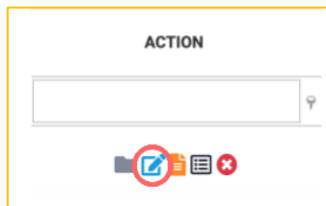
Client External ID Field

The external Client ID Field should be used to add a series of numbers or letters associated with an IC.

+ Generate Enrollment Instructions Bulk Download Export ?						
Status: Enrolling Refresh						
Enter text to search...						
Drag a column header here to group by that column						
<input type="checkbox"/>	NAME	PACKAGE NAME	LOCATION	STATUS	ACTION	CLIENT CODE
Clear	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	 View Enrollment	ETS 02.28.19	Colorado Springs, CO	Enrolling 0% 	   	1234


Adding External ID while in Enrollment Grid

To add External ID while IC is enrolling in the Enrollment Grid, click the **external ID Icon** in the Action Column.



Type unique IC ID#, which can consist of any combination of letters and/or numbers, then click **Update Client Code**. Click **OK** when message appears.

Update Client Code (External Id)

Client Code for 

Client:
United Contracting Company

Location:
Colorado Springs, CO

Client Code:
* 1

2

Client Code (External Id) Update

The client code was saved successfully.

Viewing Code in Enrollment Grid

The external ID will be visible in the **Client Code** Column in the Enrollment Grid.







Enrollment > Enrolling

Negotiations
14
Need Attention

+ Generate Enrollment Instructions Bulk Download Export ? Status: Enrolling Refresh

Enter text to search...

Drag a column header here to group by that column

<input type="checkbox"/>	NAME	PACKAGE NAME	LOCATION	STATUS	ACTION	CLIENT CODE
Clear	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	 View Enrollment	ETS 02.28.19	Colorado Springs, CO	Enrolling 0% 	   	1234

Adding External ID while in Contractor Grid

To add External ID after IC has been contracted, go to the Contractor Grid, click the **external ID Icon** in the Action Column.

Enrollment > Contractors Settlements > Documents > V







Client Portal

Unassigned Subs
0
Need Assignment

Send Request Export to Excel Refresh

Enter text to search...

Drag a column header here to group by that column

<input type="checkbox"/>	ACTION	NAME	CLIENT CODE
Clear	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	    		

Type unique IC ID#, which can consist of any combination of letters and/or numbers, then click **Update Client Code**. Click **OK** when message appears.

Update Client Code (External Id)

Client Code for ██████████ ██████████

Client:
United Contracting Company

Location:
Colorado Springs, CO

Client Code:

* 1

2

Client Code (External Id) Update

The client code was saved successfully.

Viewing Code in Contractor Grid

The external ID will be visible in the **Client Code** Column in the Contractor Grid.

Enrollment ▾ Contractors Settlements ▾ Documents ▾ Vendors ▾

Client Portal
United Contracting Company Change

Unassigned Subs

0

Need Assignment >

Enter text to search...

Drag a column header here to group by that column

<input type="checkbox"/>	ACTION	NAME	CLIENT CODE
<input type="button" value="Clear"/>		<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input type="checkbox"/>		██████████ ██████████	1234

Viewing External ID in Reports

External ID will be visible in any report where **Client Code** Column is available.

Enrollment ▾ Contractors Settlements ▾ Documents ▾ Vendors ▾ Reports ▾ Logs ▾

Client Portal
United Contracting Company Change

Reports > Contractor Contacts

Drag a column header here to group by that column

OFID	FIRST NAME	MIDDLE NAME	LAST NAME
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

Column Chooser ×

BUSINESS NAME

CLIENT CODE

COUNTRY

DRIVERS LICENSE

ID

SIGNATURE STATUS

SSN

USERID

