CREATING BUSINESS ENTITIES

In the Reporting tutorials, mention is made of Carriers, Sellers and Buyers. These are known as Business Entities.

In the system, certain widely known Business Entities are accessible to all reporters. These would include common carriers, other licensees or retail locations. At the licensee level it would include your specific customers that you may want to keep confidential. These may be retail customers, cardlock customers or bulk purchasers.

Select the Maintenance tab at the top of the screen and then select Business Entities.

![Figure 1. Maintenance dropdown list to select business entities](image)

The following screen is displayed:

![Figure 2. List of existing business entities in system](image)

As mentioned, widely known business entities are already in the system. These entities have a Master Company Id of zero.

Business entities entered by an individual reporter are given a unique Master Company Id that is only viewable to the reporter.

To filter the results for a particular Business Entity, click on the Filter icon at the top right of the list (in green circle above). The column headers will now contain input boxes.
In the Legal Name input box, type all or part of the business name. Click the small, black funnel to the right of the box and from the box select “Contains”. All Business Entities that contain the text entered are displayed.

As mentioned, widely known entities are already in the system. These entities have a Master Company Id of zero. Business entities entered by an individual reporter are given a unique Master Company Id that is only viewable to the reporter.

If you cannot locate a business record by filtering the screen contents, you will need to create the record. Click the “Add New record” selection at the top left of the location list. An entry screen appears:
Enter the following mandatory fields:

- **Legal Name**: Business name
- **Trade Name**: DBA of business – if none exists, retype business name
- **Effective Date**: Must be prior to beginning of report period being entered
- **Id Type**: Defaults to FEIN – change if necessary
- **Id Code**: Tax Identification Number – if unavailable, leave Id Type as FEIN and enter 9 nines
- **Region/State**: Select Oregon from drop-down box

Once entry is complete, click the “Insert” button at the bottom of the entry screen.

The system will then display a red message indicating the record was inserted or there was an error.

Once the record has successfully been inserted, the screen will also change to display new tabs:

![Business entity screen with new tabs.](image)

Select the “Business Accounts” tab. The following screen is displayed:
Select “Add New Record” at the top left of the gray box. The screen changes again.

Complete the following fields:

- **Jurisdiction**: Select Oregon from the drop-down list
- **Business Type**: Defaults to Buyer – can also select Seller or Carrier from drop-down box

Click on the small check mark in the circle at the bottom left of the entry screen.

The screen will now appear as follows:
If the Business Entity entered requires more than one Business Type (Carrier, Buyer or Seller), select “Add New Record” again and enter the new information. Once completed, the newly created record will appear at the top of the Business Entities screen.

This entity record can now be found when manually entering a schedule that calls for a Carrier, Seller or Buyer. In the drop-down box, begin typing the name and the list will narrow down to the closest matching entries.

**ADDING BUSINESS TYPES TO EXISTING BUSINESS ENTITY RECORDS**

Find the applicable Business Entity record on the Business Entities screen by filtering or scrolling through items. Once located, click on the record and the entry screen will come up. Select the Business Accounts tab and enter the new Business Type record using the same procedure detailed above for new records.