## Guidance for: Applicant Information



Applicant information is required for all ezFile filings. Once you have provided your applicant information, it is available in the system for re-use in other filings.



A group, club, organization, or individual must provide the following:

- Name
- Address
- Phone number
- Contact Person

### **Applicant Information**

(Includes name, address, phone)





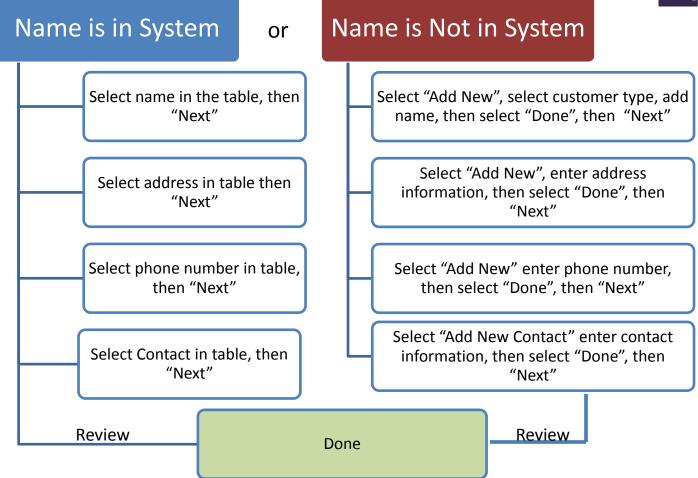
Applicant information: Select previously entered applicant information or if new ezFile applicant, add your information.

A "pencil" indicates details within the section need to be provided. A "check mark" indicates all details have been provided.

# Data entry sequence for Applicant Information







## Begin by Searching

Select "Add" to search for your name or the name of the club or organization you are representing.







Everyone must start by searching the database. Select "Add".

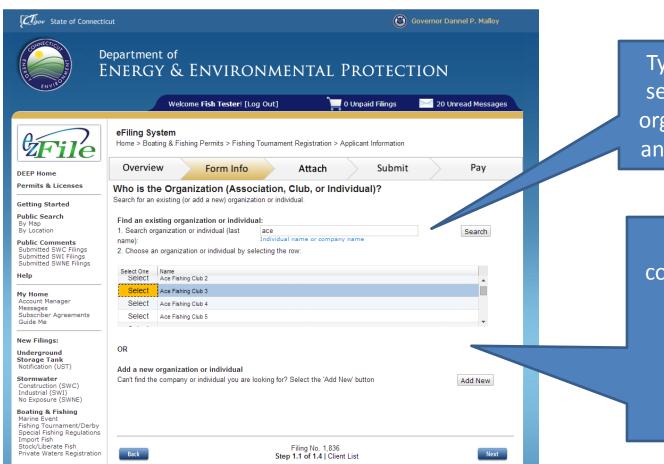
Navigation buttons to move forward and back through the forms.

#### Search Names

Review results to find your name or the name of the club or organization you are representing. If you are not found, select "Add New".







Type at least 3 letters to search for yourself, your organization or your club, and then select "Search".

contains your information

OR

if you are not found,

select "Add New".

THEN select

"Next".

Select the row that

## Add New: Customer Type





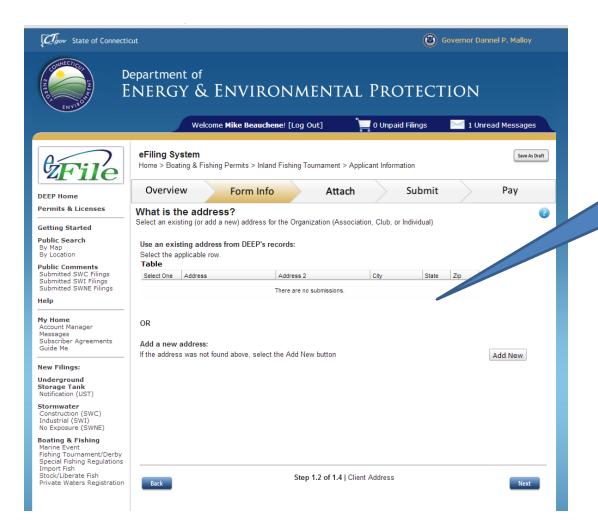


Select the appropriate option and then enter the name.

#### Add New: Customer Address







Select an existing address or "Add New".

#### Add New: Customer Phone Number







Select an existing phone number or "Add New".

#### Add New: Customer Contact Person





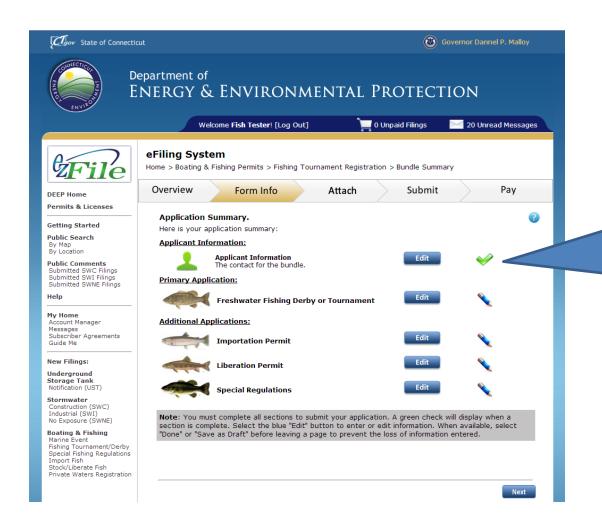


Select an existing contact or "Add New".

## Add New: Completed







The green "check mark"
indicates you have
entered all of the
necessary applicant
information.
You can now proceed to
the Primary and
Additional Application(s).