

How to Enter a Classification

Instruction to log in and enter client record' updates to the Xendirect Registration system:

1. Go to the website: <u>https://laguardia.xendirect.com/login</u>; your loading page will look like this:



If credentials have not been provided, please contact your program director.



3. To find a client's record, type the business name in search bar as shown below:

XenDirect Enterprise		≡ LaGuardia	Community C	ollege ACE							≡	*	J
Home		Home / Clients											
Clients		00 mb			***								
Companies		CLIENTS	ATTENDANCE	CASE NOTES	MORE *								
Services V	·	+ NEW CLIENT											
Financial V	·	Trade									~	_	
Staff		Induq										-	•
InSight		Found 1 record ma	atching "Trade" 🛞										
Selects										C (2)	1-1 of 1	<	>
			Cilient ID	↑ Name		Туре	Company/Employer	Assignments	Age	Birth Date	Mailing F	Preferenc	;e
			CE143908	(Retail) Trade, Transportation a	nd Utilities, NA	Î.		1	0	11/1/2023			
										1-1 of 1 < 1	> 1	0 v p	er page

Then simply hit Enter or click on magnifying glass icon to see the search results. For our case, we are searching for a business named "Trade"

4. Once you locate the business, hover over the specific business and select the three dots as shown and select Classifications from the menu as shown below:

XenDirect Enterprise	\equiv LaGuard	Profile	ACE				
Home	Home / Clients	L→ Assessments					
Clients	*	Classifications	B				
Companies	CLIENTS	Fee Groups	CASE NOTES	MORE -			
Services 🗸	+ NEW CLIENT	Funding					
Financial 🗸		Residency					
Staff	Trade	Registration					
InSight	Found 1 record	Applications					
Selects		Assignments					
		Graduation					
		Invoices			Туре	Company/Employer	Assignments
	B / ()	Payments	ide, Transportation and Utili	ties, NA	1		1
		Placement					
		Programs					
		Outcomes					

5. Once the Classifications tab displays you can view existing entries and you can add an additional entry by pressing **+ Add Classificantion**

XenDirect	Enterprise	≡ LaGuardia	Community Colle	ege ACE	
Home		Home / Clients /	Client (CE143908) / Cl	aasificationa	
Clients			2	E .	
Companies		CLIENTS	ATTENDANCE	CASE NOTES	M
Services	~	Client: (Reta	il) Trade, Transpo	rtation and Utilities	, NA (
Financial	~	CLIENT ASSIGN	MENTS INVOICES I	PAYMENTS CLASSIFICAT	IONS
		+ ADD CLAS		MULTIPLE	

6. You will be able to view a new window for the New Classification

≡ LaGuardia Community College	ACE				
Home / Clients / Client (CE143908) / Class	New Classific	cation			
CLIENTS ATTENDANCE	Classification *	- Select -		* ≡₊	
Client: (Retail) Trade, Transporta	Eligibility Start Date	mm/dd/yyyy			
CLIENT ASSIGNMENTS INVOICES PAY	Eligibility End Date	mm/dd/yyyy			
+ ADD CLASSIFICATION I → ADD MU	Review Date	mm/dd/yyyy			
Number of Businesses Serv	Notes/Answer				siness Developme
Number of Counseling Hou					siness Developme
		<u>14</u>		/_	
	Question	- Select -		*	
	Course Section	- Select -		*	
	Client Application	- No Items Available -		.	
			+ CREATE	CANCEL	

• The fields that are required to be filled out are Classification, Notes/Answer and Course Section.

7. From the classification field if you begin typing the entry Number you can select the title from the drop down list.

Num	× •	=
Number of Rusinesses Served		
Number of Businesses Served		
Number of Counseling Hours		
Number of Loans		
	Number of Counseling Hours Number of Loans	Number of Counseling Hours Number of Loans

8. On the field Notes/Answer you can enter the total of business served.

Classification *	Number of Businesses Served	× • ≡+
Eligibility Start Date	mm/dd/yyyy	
Eligibility End Date	mm/dd/yyyy	
Review Date	mm/dd/yyyy	
Notes/Answer	11	

9. Under the Course Section field begin typing the course that corresponds to your program and a list of courses from each quarter will begin to display.

Course Section	SBDC		×	
Client	BUSS001S23.BXX.01.00 - Sma	Il Business Development Co	enter	(SBDC) - Summer 2

10. Verify the information is correct and proceed to press create.

Notes/Answer	11	
		_//
Question	- Select -	•
Course Section	BUSS001S23.BXX.01.00 - Small Business Develc 🗙	•
Client Application	- No Items Available -	*
	+ CREATE CANCEL	

11. Once completed the entry will be listed on the classification panel.

CLIENT AS	SSIGNMENTS	INVOICES	PAYMENTS	CLASSIFICATIONS	MORE *						
+ ADI	D CLASSIFICATIO		D MULTIPLE			C	0	1-1 of 1	<	>	
	↑ Clas	sification	Categor	y Question	Course Se	ection			Notes/A	nswer	
	Numbe Busines Served	Number of Businesses Served		Demographic Data		BUSS001S23.BXX.01.00 - Small Business Development Center (SBDC) - Summer 2023			11		

For further info, please visit the Xendirect Knowledge Base page:

https://xenegrade.kayako.com/article/158-classification