Correspondents

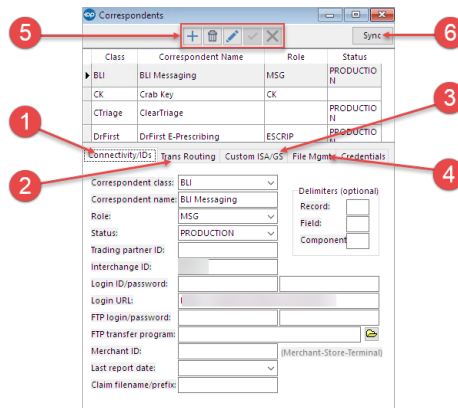Last Modified on 08/13/2021 3:24 pm EDT

Version 14.19

> This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Correspondents

Path: Admin tab > Connections button

The Correspondents table houses all exchange credentials needed to electronically transmit information to outside vendors such as clearinghouses, Chadis, and PMX, to name a few. Correspondent records are also used to sync services within OP, such as Colossus connectivity.
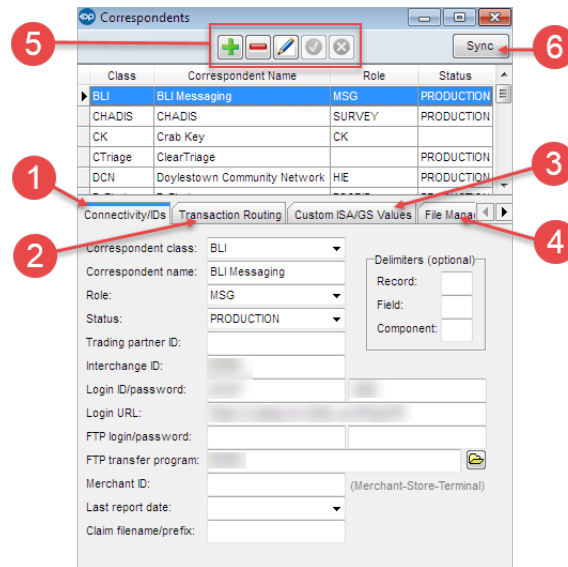

Correspondents Map

Number	Section	Description
1	Connectivity/IDs tab	The Connectivity/IDs tab views or creates an e-correspondent. Here you can set the correspondent class, name, role, status, URL, FTP login/password, and more.
2	Transaction Routing tab	The Transaction Routing tab determines which types of transactions you will use with each correspondent.
3	Custom ISA/GS Values	The Custom ISA/GS Values tab sets custom ISA and GS qualifiers. Information and Sender/Receiver IDs can be entered here as well.
4	File Management	File Management connects to the document repository for transaction files. Transactions can be added, modified, saved, and removed.
5	Function buttons	The function buttons create an e-correspondent, remove an e-correspondent, edit an e-correspondent, save an e-correspondent, and cancel creating an e-correspondent.
6	Sync button	The **Sync** button syncs the e-correspondents with the outside vendors and with Platform Manager.

Version 14.10

About Correspondents

Path: Utilities Menu > System Admin > e-Correspondents (Keyboard Shortcut keys: [Alt][U][A][E])

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