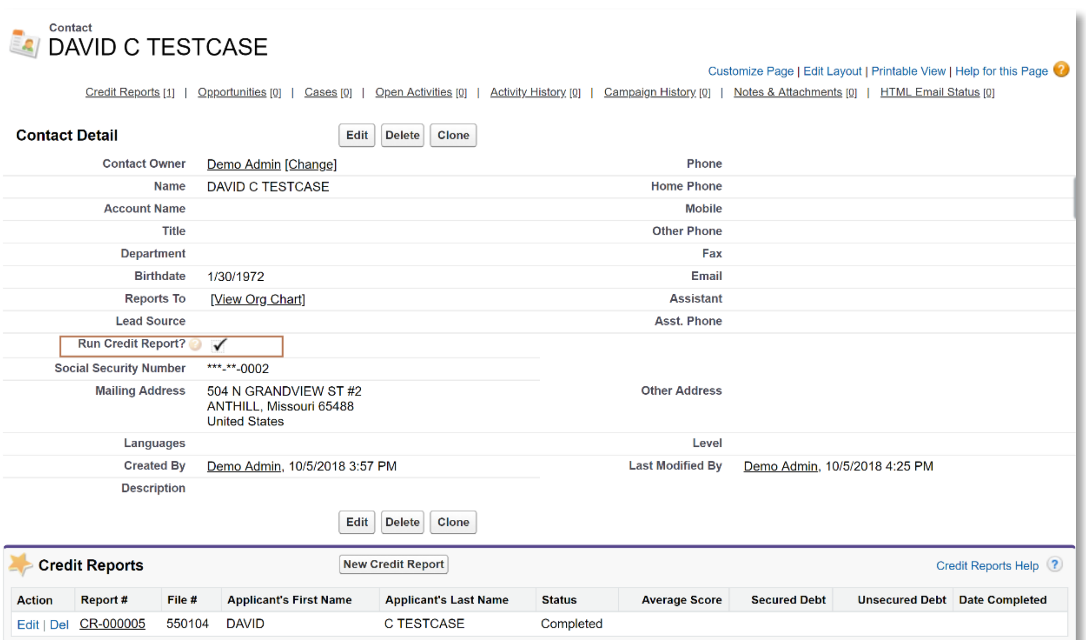
User Guide – Credit Checker Consumer

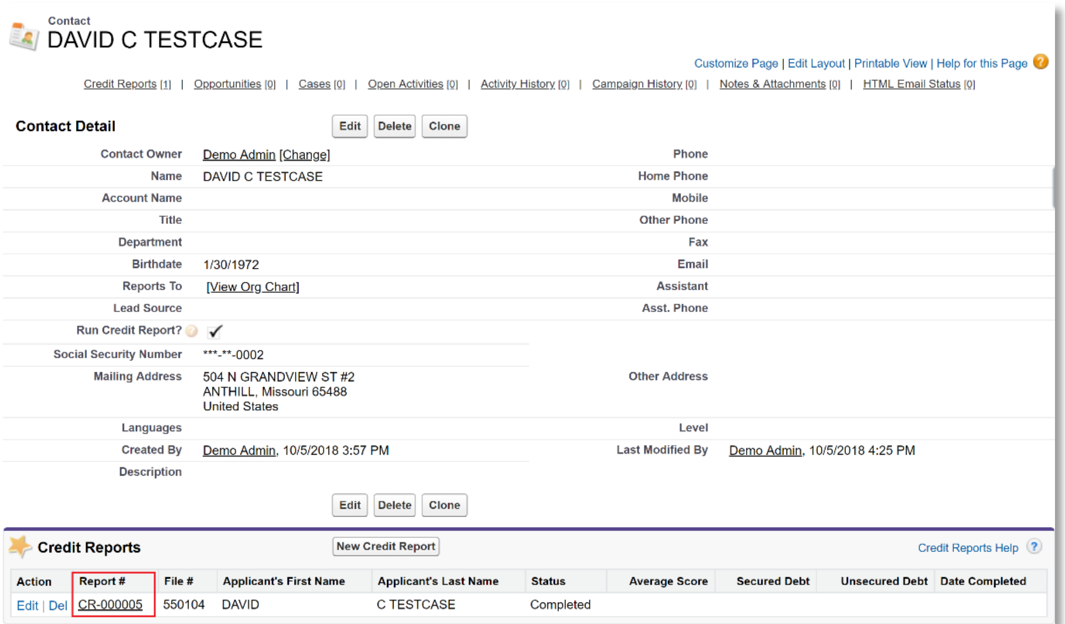
Scenario 1 –

Run a report directly from Contact.

1. Login to Salesforce.com using your credentials.
2. Go to the contact record and create a new contact.
3. Fill all required fields –
    a. First Name
    b. Last Name
    c. Social Security Number
    d. Address
    e. Run Credit Report?



4. The "Credit Report" record will be automatically created at this point. From the "Credit Report" related list, select the record.


Contact
DAVID C TESTCASE

Customize Page | Edit Layout | Printable View | Help for this Page

Credit Reports [1] | Opportunities [0] | Cases [0] | Open Activities [0] | Activity History [0] | Campaign History [0] | Notes & Attachments [0] | HTML Email Status [0]

Contact Detail — Edit | Delete | Clone

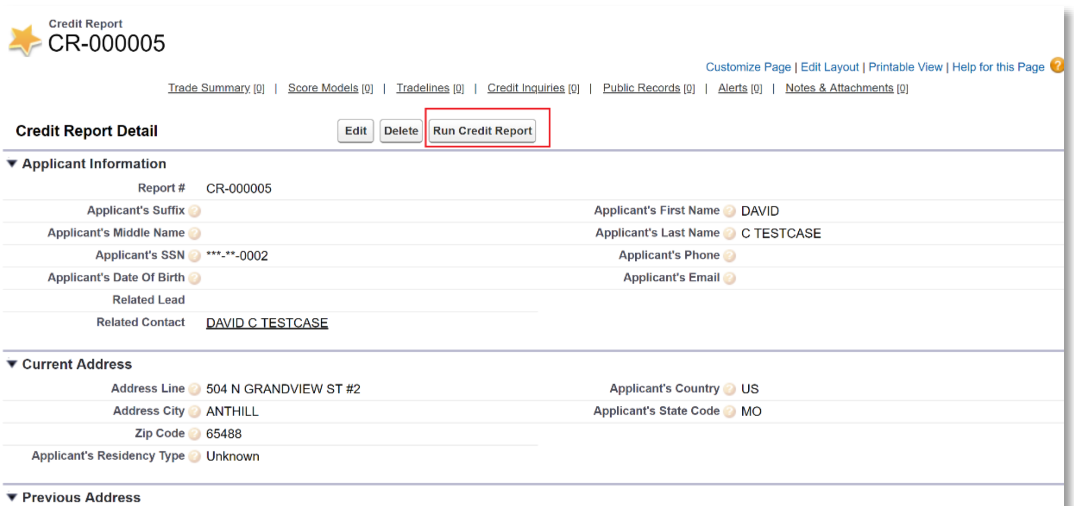
Contact Owner	Demo Admin [Change]	Phone	
Name	DAVID C TESTCASE	Home Phone	
Account Name		Mobile	
Title		Other Phone	
Department		Fax	
Birthdate	1/30/1972	Email	
Reports To	[View Org Chart]	Assistant	
Lead Source		Asst. Phone	
Run Credit Report?	✓		
Social Security Number	***-**-0002		
Mailing Address	504 N GRANDVIEW ST #2 ANTHILL, Missouri 65488 United States	Other Address	
Languages		Level	
Created By	Demo Admin, 10/5/2018 3:57 PM	Last Modified By	Demo Admin, 10/5/2018 4:25 PM
Description			

Edit | Delete | Clone

Credit Reports — New Credit Report — Credit Reports Help

Action	Report #	File #	Applicant's First Name	Applicant's Last Name	Status	Average Score	Secured Debt	Unsecured Debt	Date Completed
Edit | Del	CR-000005	550104	DAVID	C TESTCASE	Completed				

5. Click on the “Run Credit Report” button. Application can be customized to automate this step.


Credit Report
CR-000005

Customize Page | Edit Layout | Printable View | Help for this Page

Trade Summary [0] | Score Models [0] | Tradelines [0] | Credit Inquiries [0] | Public Records [0] | Alerts [0] | Notes & Attachments [0]

Credit Report Detail — Edit | Delete | Run Credit Report

Applicant Information

Report #	CR-000005		
Applicant's Suffix		Applicant's First Name	DAVID
Applicant's Middle Name		Applicant's Last Name	C TESTCASE
Applicant's SSN	***-**-0002	Applicant's Phone	
Applicant's Date Of Birth		Applicant's Email	
Related Lead			
Related Contact	DAVID C TESTCASE		

Current Address

Address Line	504 N GRANDVIEW ST #2	Applicant's Country	US
Address City	ANTHILL	Applicant's State Code	MO
Zip Code	65488		
Applicant's Residency Type	Unknown		

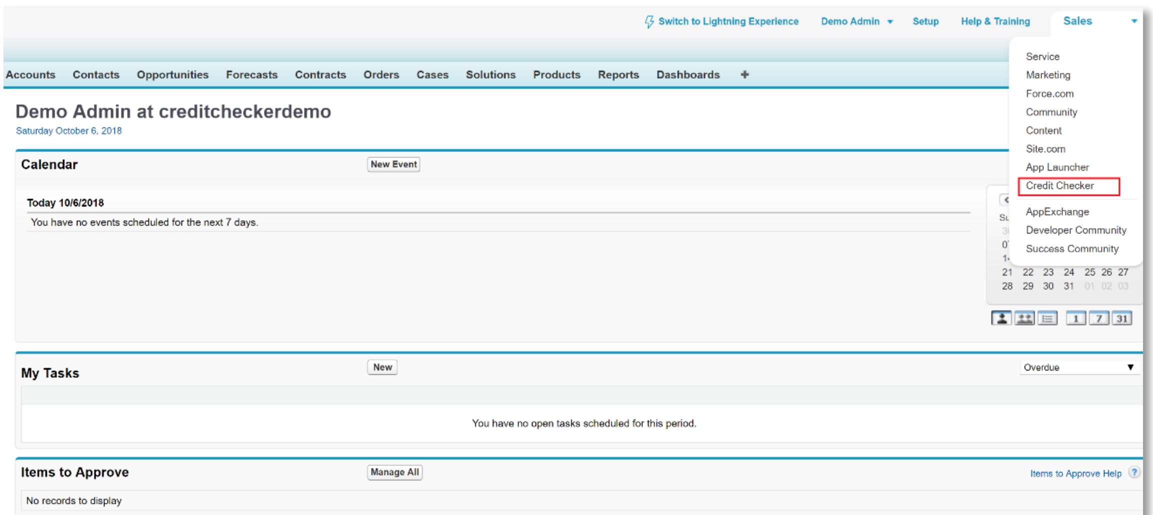
Previous Address

6. Please follow the instructions on the page to run the report.

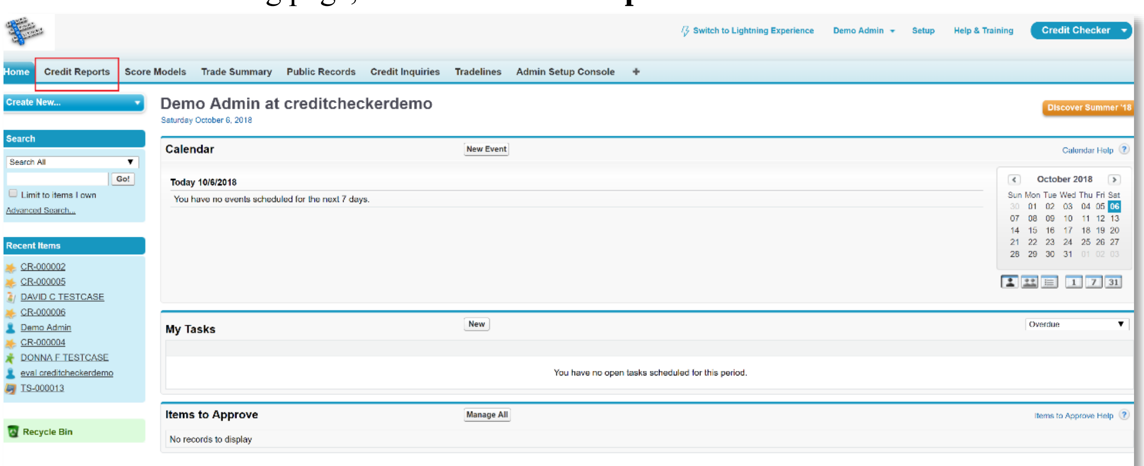
Scenario 2 -

Fetch report for new consumer directly from Credit Report Object. (All these steps can be automated. Please consult your admin).

1. Login to Salesforce.com using your credentials.
2. From the application menu, select "**Credit Checker**" application.



3. On the landing page, click on "**Credit Reports**" tabs.



4. Click on "**New**" button to create new credit report record.
5. Please select the record type.
    a. **Individual Report** – If you would like to run a report on single user.
    b. **Joint Report** – If you would like to run a report on multiple users.
6. Fill all the require fields and click on the "**Save**" record.
7. Click on the "Run Credit Report" button. Application can be customized to automate this step.

8. Please follow the instructions on the page to run the report.

Note:- Fill all the required fields. If you don't have social security number, Please populate "000000000".

Scenario 3 -

Refresh consumer report. (All these steps can be automated. Please consult your admin)

1. Login to Salesforce.com using your credentials.
2. Go to the "**Credit Report**" record either from the credit report record or related list of parent record.
3. Click on "**Run Credit Report**" button to refresh the credit data
4. Click on "**Refresh Report**" button to refresh the credit report
5. Review the message and follow the steps.