



ACT Portfolio Management Product Suite Reference

Protect Your Profits! Portfolio management tools to help you evaluate and manage your customer accounts.

ACT Report - *Non-traditional & alternative financial credit data*

- Non-traditional & alternative financing credit information not found on the typical credit bureau report or on your customer's application
- Get a broader picture of your customer's financial behaviors to help build payment plans
- Add-on to the CREDCO credit report or Stand Alone through DeskManager

ACT Monitoring* - *Proactive account monitoring*

- Monitor your customers' financial activity to stay ahead of changes that could affect your portfolio
- Color coded to quickly assess the priority of alert information
- Rank order your accounts for servicing and potential risk

RED ALERTS	YELLOW ALERTS	GREEN ALERTS
<ul style="list-style-type: none">- Derogatory status updates- Bankruptcy status updates- Landlord eviction status updates	<ul style="list-style-type: none">- New Landlord Tenant inquiries	<ul style="list-style-type: none">- New inquiries

ACT Tracing - *Receive new and updated customer contact information*

- Receive new and updated customer contact information in real-time, sourced from new inquiries
- Historical check for updated information based on previous inquiries in the last 90 days
- Continued monitoring for new information until account is closed

How to use ACT in Your Business

All products work together to help you protect your profits!

STEP 1 – Use the ACT Report in the application process. Determine if there are any additional financial behaviors that can be factored in to the deal structure. Be aware of any existing Bankruptcy or Landlord Eviction court records.

STEP 2 – Monitor all of your account records for changes in financial behaviors or a possible change of address. Use this information to prioritize your accounts for servicing and follow up. Once the account is closed, simply delete the account from monitoring.

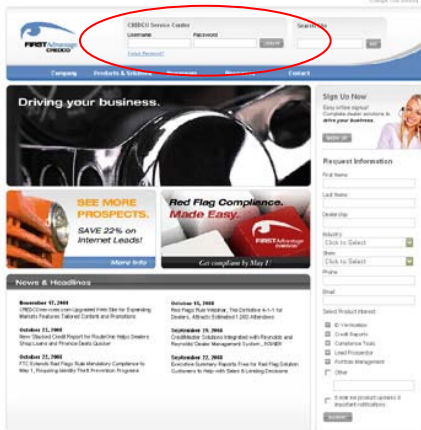
STEP 3 – If your account does skip, start looking for new or updated contact information; like addresses, telephone numbers and employment information. New inquiries are compared to the account information you provide. Once the account is closed, simply delete the account from monitoring.

⁸ Permissible purpose for Account Review only. No adverse action should be taken based on information returned in these products. To be used for servicing strategies.



ACT Product Suite® Quick Start Guide

Getting Started on CREDCOservices.com!



ACT Portfolio Management:

Begin by typing www.CREDCOservices.com into your Internet Browser.

This is the application that you will use to manage your subscription and view your ACT Monitoring and ACT Tracing Reports

Find out what other First Advantage CREDCO products and services are available to support your business needs!

SYSTEM COMPANY FOR ADMINISTRATIVE PURPOSES Dashboard
CREDCO Service Center

CLICK YOUR SELECTION BELOW TO GET STARTED

Fast Tools	
Credit Reports	GET STARTED
BuyerID Check	GET STARTED
BuyerID Advanced	GET STARTED
ACT Portfolio Management	GET STARTED
Marketing Tools	
Lead Prospector Internet - Get your leads!	GET STARTED
Lead Prospector Bankruptcy - Get your leads!	GET STARTED
MyMarket IQ	GET STARTED
Reports	GET STARTED



Access ACT Products

Once you have logged in, you will be directed to the CREDCO Service Center.

To manage your ACT Portfolio select the ACT Portfolio Management button to access the ACT applications.

You can also order a Stand Alone ACT Report, right from credcoservices.com by selecting the Credit Reports button!



Manually Adding ACT Monitoring Records:

From the ACT Monitoring Application screen, click on the **"Add New Account"** button.

This will bring you to an input screen.

If you have records that you would also like to add to ACT Tracing, you can simply click the **"Skip Req"** button from the ACT Monitoring records screen.

Or you can manually add records directly in the ACT Tracing Application.



ACT Product Suite® Quick Start Guide

ACT Account Management - Add New Account

ACT/FirstAdv Customer Account
Add a new customer account

Customer Number

*First Name MI *Last Name Suffix

DOB

*SSN mm/dd/yyyy Contact Phone Email Address

Street Number Direction *Street Name Type

Apt / Suite Additional Address

*City *State *Zipcode Zip 4

Employer Name Job Title Work Phone

Save Cancel

Need more information? [CLICK HERE](#) to contact Customer Support or call 866.694.2489.
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Inputting Data for ACT Monitoring Records:

Simply fill in the fields with your existing record information.

Required fields are marked with an asterisk.

Click on the "Save" button.

If you do not want to enter a record, click on the "Cancel" button.

You will be brought back to the ACT Monitoring records screen.

ACT Monitoring Accounts

1 2 3

ACT Monitoring Accounts

Search Active Accounts

SPR	Prod Name	East Name	Customer #	SSN	State	Locat	Calculated	Alerts	History
Karl	Customer	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
John	Kirkland	333314	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Charlie	CRS/CO	333314	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Della	John	333314	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Mark	Smith	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Jack	London	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Barthol	Jackson	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Charlie	Cherry	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
John	Kennedy	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Paul	Payroll	22879	***-**-1234	11/11/09	IL	62404	11/23/09	1/23/09 11:23PM	Latest
George	Thomas	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Joe	Perry	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest

ACT Monitoring Application:

By default, you will be directed to the ACT Monitoring application. Here you can view, edit* and delete your customer accounts from monitoring.

1. Summary of Monitoring and Tracing activity
2. "Search" for customer accounts
3. View new and historical alert reports

To start monitoring your skip accounts for ACT Tracing reports, click on the "Skip Req" button.

* It is recommended that you perform edits in your DMS application.

ACT Monitoring Accounts

ACT Monitoring Accounts

Search Active Accounts

SPR	Prod Name	East Name	Customer #	SSN	State	Locat	Calculated	Alerts	History
Karl	Customer	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
John	Kirkland	333314	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Charlie	CRS/CO	333314	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Della	John	333314	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Mark	Smith	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Jack	London	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Barthol	Jackson	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Charlie	Cherry	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
John	Kennedy	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Paul	Payroll	22879	***-**-1234	11/11/09	IL	62404	11/23/09	1/23/09 11:23PM	Latest
George	Thomas	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest
Joe	Perry	333312	***-**-1234	6/24/78	IL	62404	11/23/09	1/23/09 11:23PM	Latest

View ACT Monitoring Reports:

You will receive an **email** when new alerts are received! Customer accounts with a new ACT Monitoring report will be sorted at the top of the customer account list.

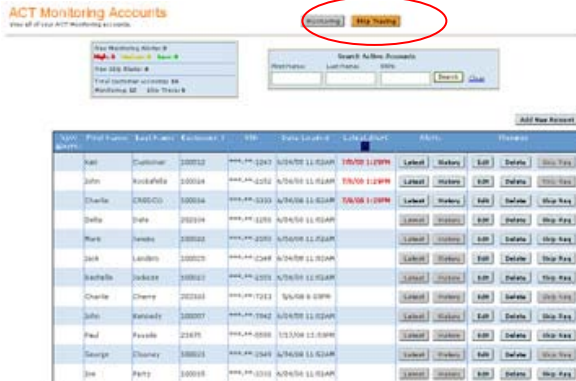
"Latest Alert" column displays the date of the alert, which is color-coded by the highest priority alert.

A green checkmark will be present next to the customer account when there are unviewed alerts, both new and historical!

To view new reports click on the "Latest" button
To view historical reports click on the "History" button.



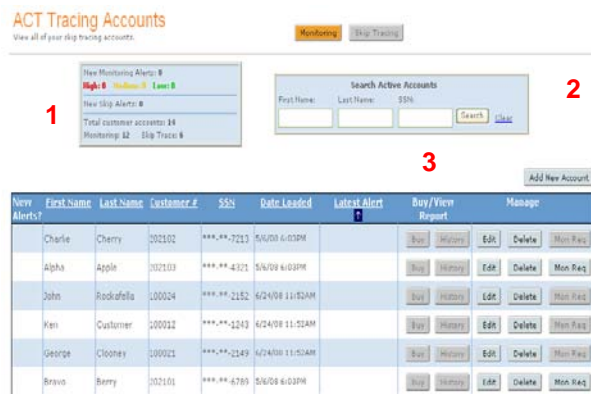
ACT Product Suite® Quick Start Guide



Accessing ACT Tracing Reports:

When you are ready to see your ACT Tracing customer records and view ACT Tracing reports, click on the orange "Skip Tracing" button.

This will bring you to the ACT Tracing Application!



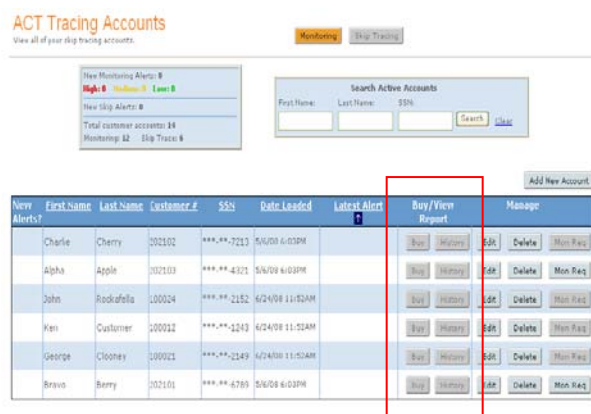
ACT Tracing Application:

Same features as the ACT Monitoring Application!

1. Summary of Monitoring and Tracing activity
2. "Search" for customer accounts
3. "Buy" new and View historical tracing reports

A green checkmark will be present next to the customer account when there are unviewed alerts, both new and historical!

If you have an account in Tracing, but not in Monitoring, click on the "Mon Req" button.



View ACT Tracing Reports:

You will receive an email when new tracing information is received! Customer accounts with a new ACT Tracing report will be sorted at the top of the customer account list.

A green checkmark will be present next to the customer account when there are unviewed alerts, both new and historical.

To purchase new reports click on the "Buy" button
To view historical reports click on the "History" button.



ACT Tracing Accounts
View all of your slip tracing accounts.

Monitoring Skip Tracing

New Monitoring Alerts: 8
High 0 Medium 0 Low 8
New Skip Alerts: 0
Total customer accounts: 14
Monitoring: 12 Skip Tracing: 2

Search Active Accounts
First Name: Last Name: SSN: [Search] [Clear]

New Alerts?	First Name	Last Name	Customer #	SSN	Rate/Lead	Lastest Alert	Buy/Ven Report	Manage
	Charlie	Cherry	002102	***-**-7213	6/6/09 6:03PM		Stop Monitor Edit Delete New Page	
	Alpha	Apple	002103	***-**-4321	5/6/09 6:03PM		Stop Monitor Edit Delete New Page	
	John	Rodafella	000024	***-**-2152	6/24/08 11:52AM		Stop Monitor Edit Delete New Page	
	Ken	Customer	000022	***-**-2243	6/24/08 11:52AM		Stop Monitor Edit Delete New Page	
	George	Clooney	000021	***-**-2149	6/24/08 11:52AM		Stop Monitor Edit Delete New Page	
	Bravo	Berry	002101	***-**-6789	5/6/09 6:03PM		Stop Monitor Edit Delete New Page	

Stop ACT Monitoring and ACT Tracing:

Once an account is closed and there are no further actions to be taken with an account, use the “Delete” button.

This will remove the customer account from the active monitoring programs and from your list of customer records.

NOTE: You must delete the record from both the ACT Monitoring and ACT Tracing applications separately.



Learn more about the ACT Portfolio Suite!

www.CREDCOservices.com

ACT Portfolio Suite Features:

- Automated email alerts for new ACT Monitoring and ACT Tracing reports
- User-friendly navigation and record management
- Easy access between ACT Monitoring and ACT Tracing platforms
- Ability to manually add, delete and edit customer account records
- User level permissions for customer record modifications
- Historical view of all activities related to a customer record
- Update/change alert notification contacts