



## 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

### **ACT Monitoring<sup>\*</sup> - *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
- Derogatory status updates - Bankruptcy status updates - Landlord eviction status updates	- New Landlord Tenant inquiries	- 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

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## 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.

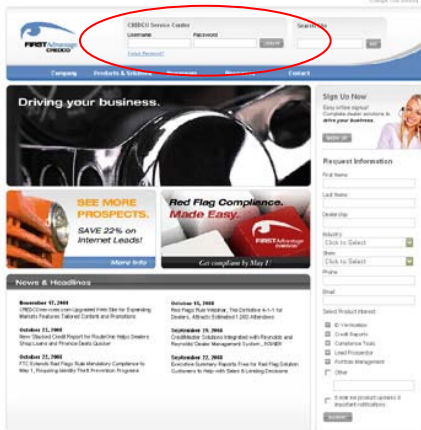
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<sup>8</sup> Permissible purpose for Account Review only. No adverse action should be taken based on information returned in these products. To be used for servicing strategies.



## ACT Product Suite® Quick Start Guide

### Getting Started on CredcoServices.com!



#### ACT Portfolio Management:

Begin by typing [www.CredcoServices.com](http://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 CoreLogic 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

Add a new customer account

ACT/Find/Act 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

View all of your ACT Monitoring accounts.

Monitoring Skip Tracing

1 2 3

ACT Monitoring Summary

1 2 3

SPM	Prod Name	East Name	Customer #	DOB	State	Street #	City/State/Zip	Alerts	History
Karl	Customer	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
John	Kirkland	333314	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Charlie	CRISCO	333314	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Della	John	333314	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Mark	Smith	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Jack	Lindero	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Barthello	Jackson	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Charlie	Cherry	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
John	Kennedy	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Paul	Payette	22875	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
George	Thomay	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Joe	Parto	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label

## 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

View all of your ACT Monitoring accounts.

Monitoring Skip Tracing

ACT Monitoring Summary

SPM	Prod Name	East Name	Customer #	DOB	State	Street #	City/State/Zip	Alerts	History
Karl	Customer	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
John	Kirkland	333314	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Charlie	CRISCO	333314	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Della	John	333314	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Mark	Smith	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Jack	Lindero	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Barthello	Jackson	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Charlie	Cherry	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
John	Kennedy	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Paul	Payette	22875	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
George	Thomay	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label
Joe	Parto	333312	***-**-1234	5/24/78	IL	62345	IL 62345	Latest 11:09PM	Label

## 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

**ACT Monitoring Accounts**  
View all of your ACT monitoring accounts.

Monitoring Skip Tracing

New Monitoring Alerts: 0  
High: 0 Medium: 0 Low: 0  
New Skip Alerts: 0  
Total customer accounts: 88  
Monitoring: 82 Skip Tracing: 6

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

First Name	Last Name	Customer #	SSN	Date Loaded	Latest Alert	Buy/View Report	Manage
Nell	Customer	000012	***-**-2247	6/24/08 11:52AM	5/6/09 6:03PM	Buy History Edit Delete Mon Req	
John	Rodafella	000014	***-**-2152	6/24/08 11:52AM	5/6/09 6:03PM	Buy History Edit Delete Mon Req	
Charlie	Cherry	000010	***-**-7213	5/6/09 6:03PM		Buy History Edit Delete Mon Req	
Della	John	000014	***-**-2152	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
Mark	Ken	000012	***-**-2243	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
Jack	Ken	000012	***-**-2243	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
Michelle	Ken	000012	***-**-2243	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
Charlie	Cherry	000010	***-**-7213	5/6/09 6:03PM		Buy History Edit Delete Mon Req	
John	Ken	000012	***-**-2243	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
Paul	Ken	000012	***-**-2243	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
George	Cherry	000010	***-**-7213	5/6/09 6:03PM		Buy History Edit Delete Mon Req	
Joe	Pat	000018	***-**-3318	6/24/08 11:52AM		Buy History Edit Delete Mon Req	

### 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 Accounts**  
View all of your skip tracing accounts.

Monitoring Skip Tracing

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

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

1 2 3

New Alerts?	First Name	Last Name	Customer #	SSN	Date Loaded	Latest Alert	Buy/View Report	Manage
	Charlie	Cherry	002102	***-**-7213	5/6/09 6:03PM		Buy History Edit Delete Mon Req	
	Alpha	Apple	002103	***-**-4321	5/6/09 6:03PM		Buy History Edit Delete Mon Req	
	John	Rodafella	000014	***-**-2152	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
	Ken	Customer	000012	***-**-2243	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
	George	Clooney	000012	***-**-2149	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
	Bravo	Berry	002101	***-**-6789	5/6/09 6:03PM		Buy History Edit Delete Mon Req	

### 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.

**ACT Tracing Accounts**  
View all of your skip tracing accounts.

Monitoring Skip Tracing

New Monitoring Alerts: 0  
High: 0 Medium: 0 Low: 0  
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	Date Loaded	Latest Alert	Buy/View Report	Manage
	Charlie	Cherry	002102	***-**-7213	5/6/09 6:03PM		Buy History Edit Delete Mon Req	
	Alpha	Apple	002103	***-**-4321	5/6/09 6:03PM		Buy History Edit Delete Mon Req	
	John	Rodafella	000014	***-**-2152	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
	Ken	Customer	000012	***-**-2243	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
	George	Clooney	000012	***-**-2149	6/24/08 11:52AM		Buy History Edit Delete Mon Req	
	Bravo	Berry	002101	***-**-6789	5/6/09 6:03PM		Buy History Edit Delete Mon Req	

### 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 | Slip Tracing

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

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

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