User Administration Guide – Pulling and Viewing Reports

BusinessIQ

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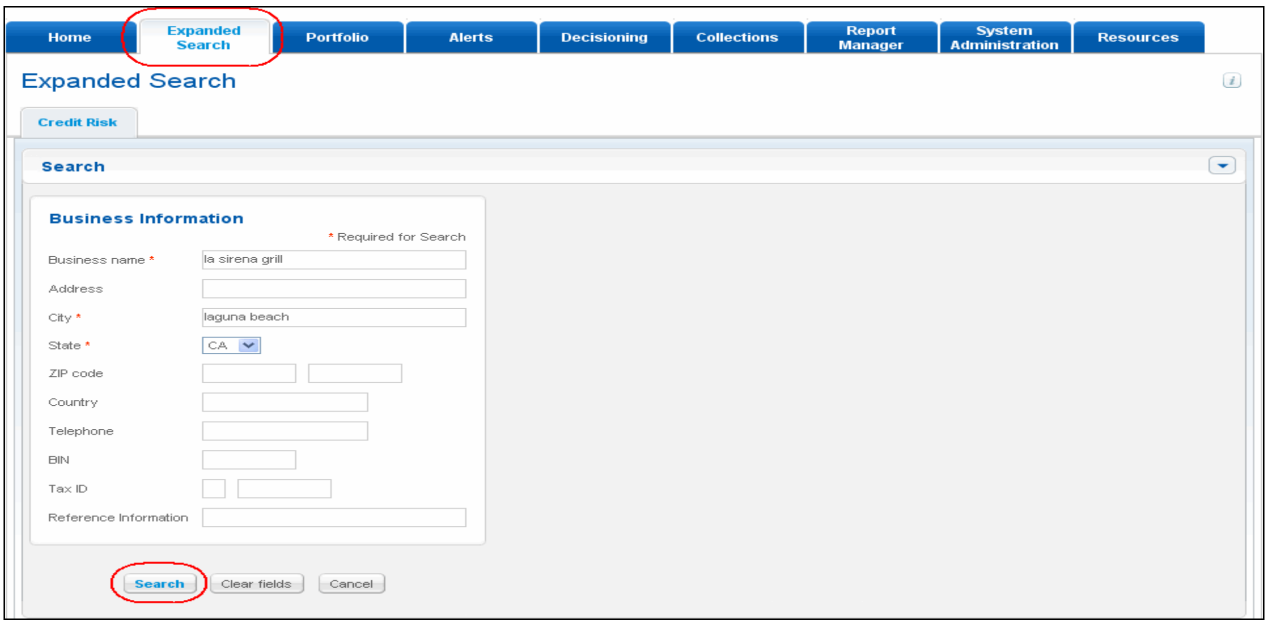
Users are created in the Access Control System, which is a tool that enables Head Security Designates and Security Designates to create, maintain and manage their Users. The product options in this document reflect Experian's business product line.

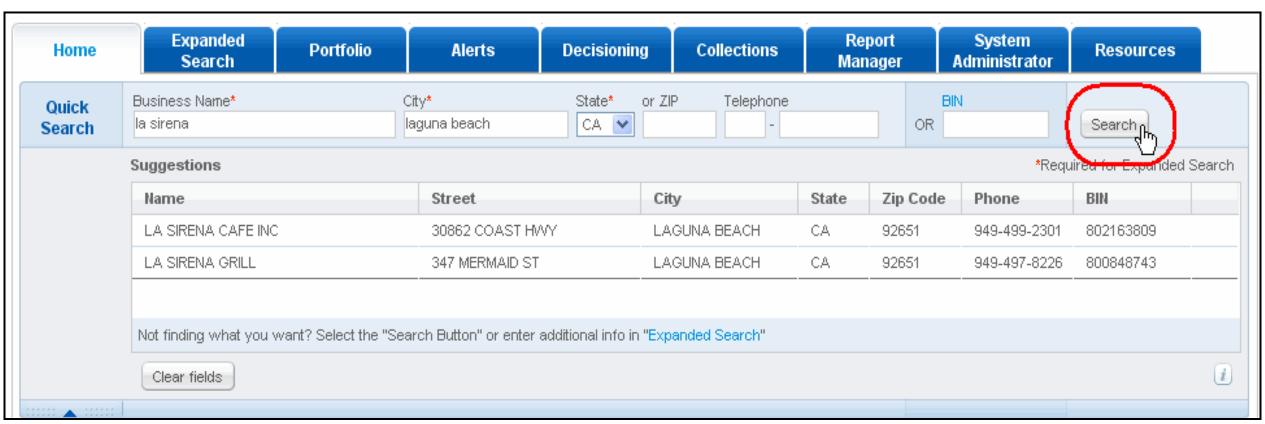
New users are created and **<u>must</u>** be assigned a company, a role and a portfolio or they will not be able to access product via BusinessIQ. Please see the *Creating Users User Guide* for more details. The following pages will illustrate how to pull and view credit reports and scores.

Pulling Credit Reports & Scores

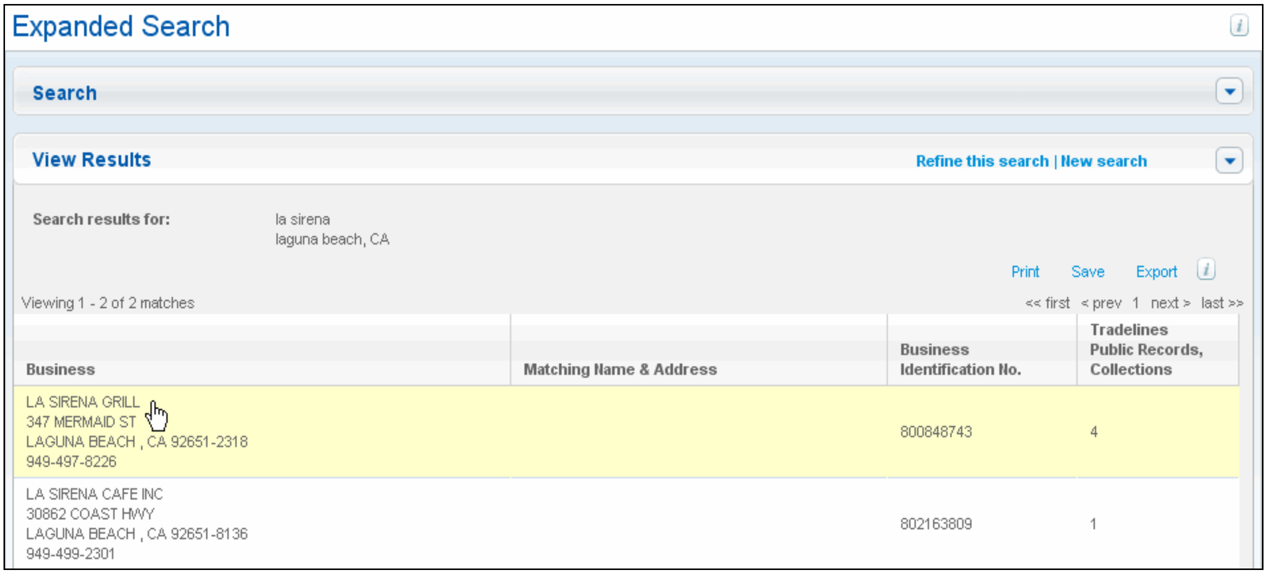
STEP 1: Search

There are two ways to search for businesses within BusinessIQ. Click the Expanded Search tab to enter your inquiry or type your inquiry into the QuickSearch bar. When using Expanded Search, enter the required information and click "Search". If using QuickSearch, enter a business name, city and state and click "Search".

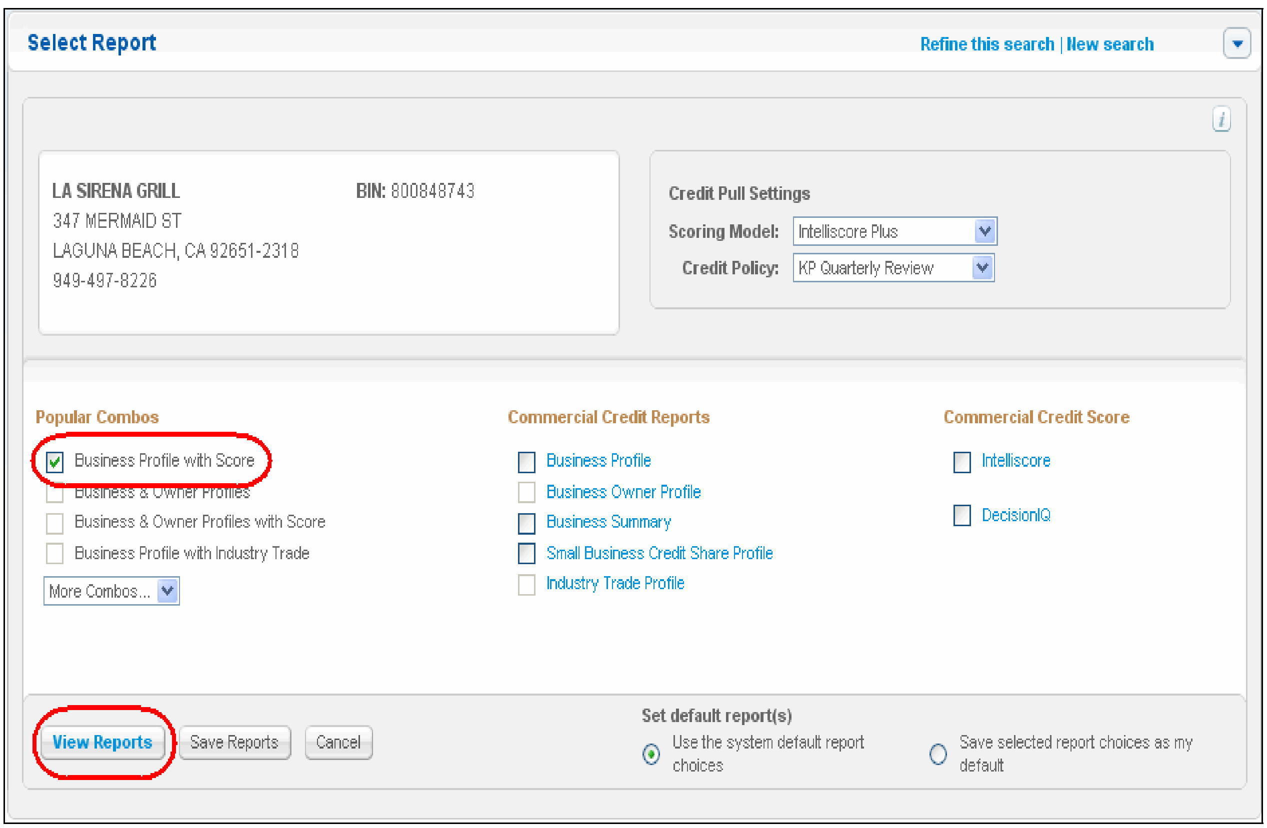




Step 2: Select a candidate (View Results)
Both methods will present a candidate list with data-depth indicators. Choose the record you are looking for by clicking it.



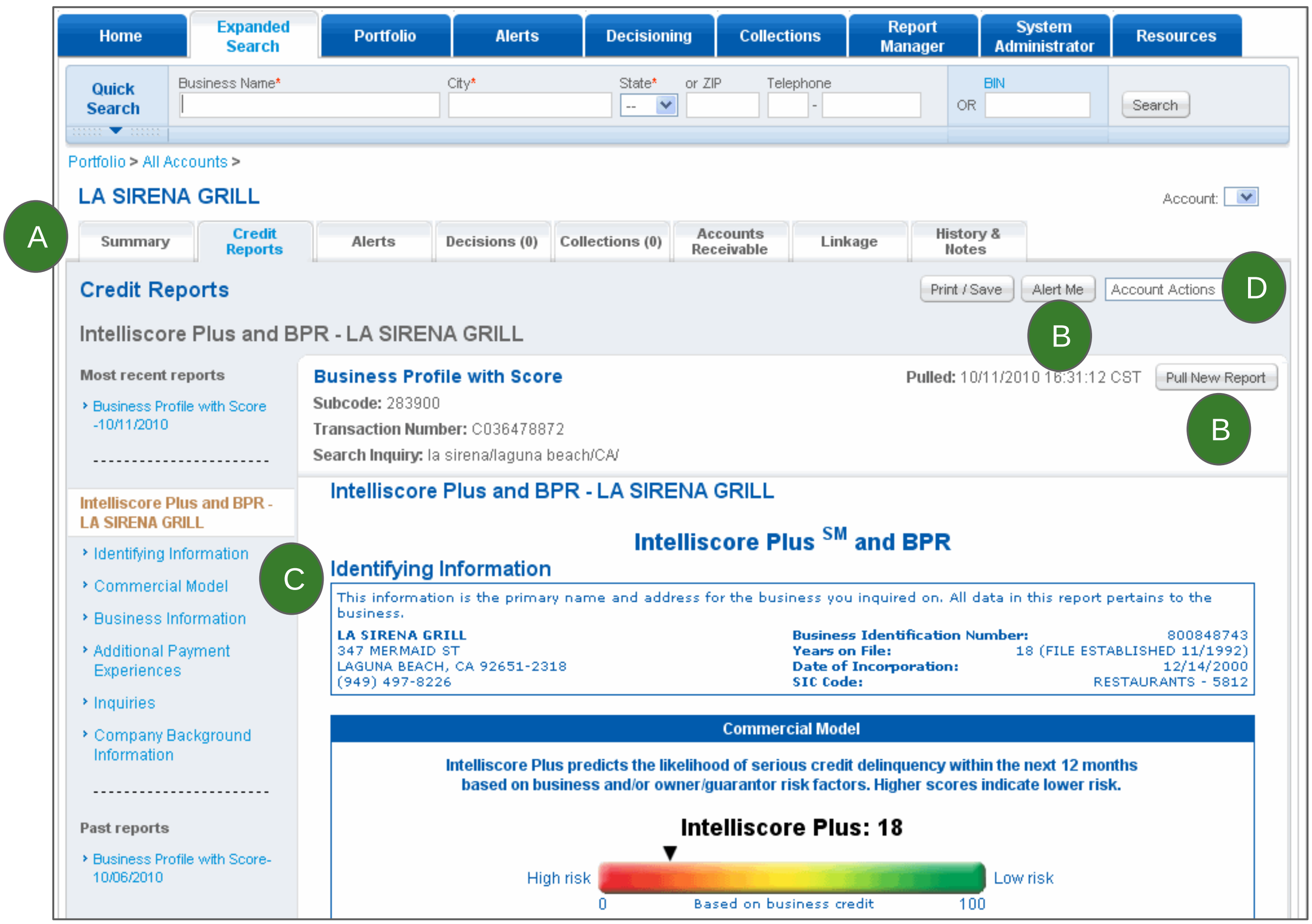
STEP 3: Select Report
Upon choosing a record, you will be taken to the Select Report page. Simply choose a product or products from the available list by checking the box and selecting the “View Reports” button to view the report. Users with multiple score models also have the ability to change the desired model via the Scoring Model dropdown box.

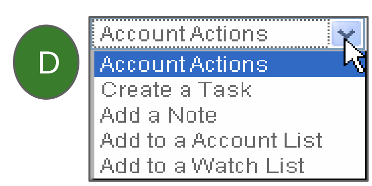


STEP 3: Viewing a Credit Report

The selected report will be displayed:

- A - Displays the product selected under the “Credit Reports” tab. The Account Details tabs allow for quick navigation of account information and provides a comprehensive view of the customer.
- B - Add account to an Alerts Monitored Set (“Alert Me”) or pull new reports seamlessly (“Pull New Report”)
- C - Report navigation allows user to jump from section to section in the report
- D - More Actions allow for: creating a task, adding a note, adding to an account list and adding to the watch list

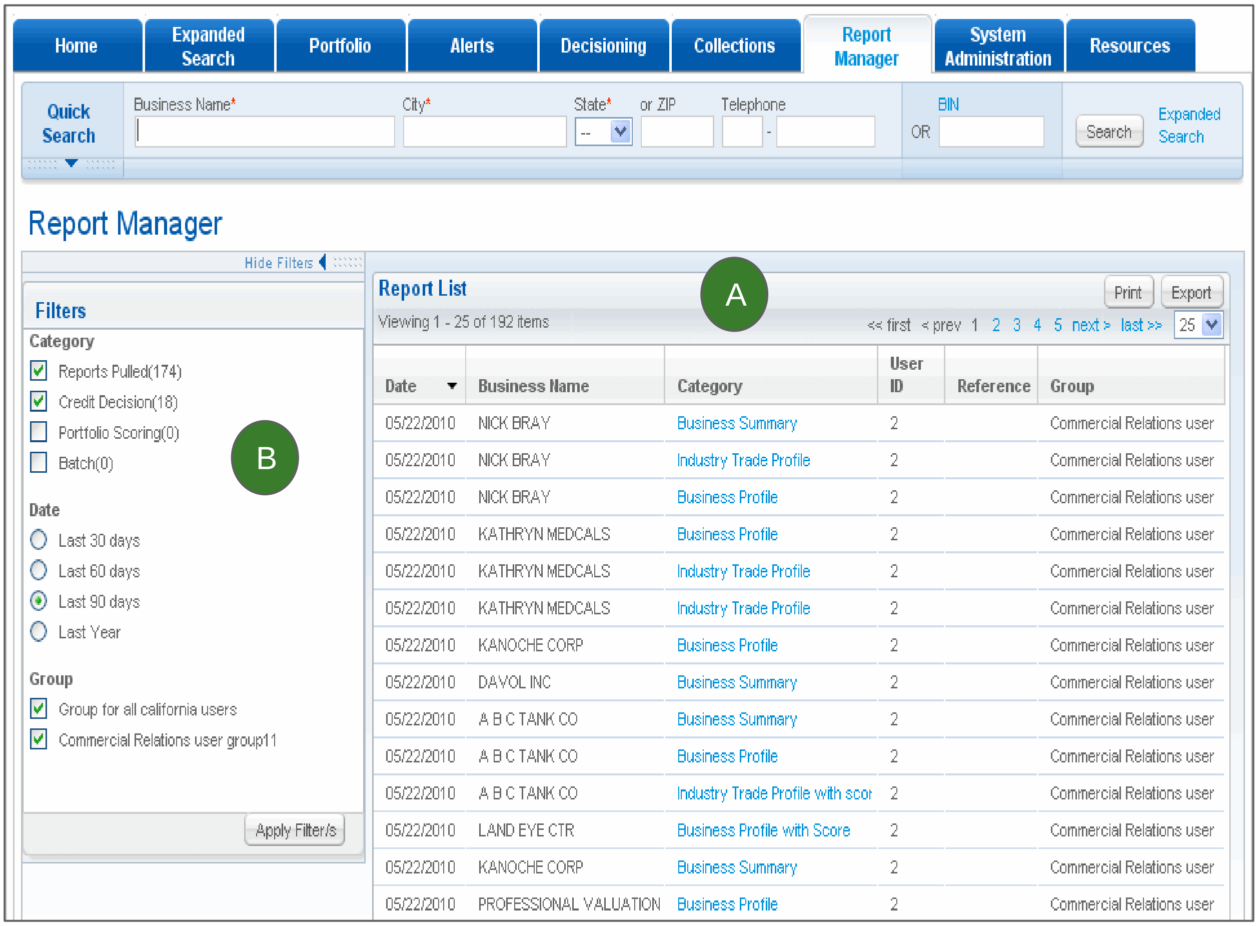




Report Manager

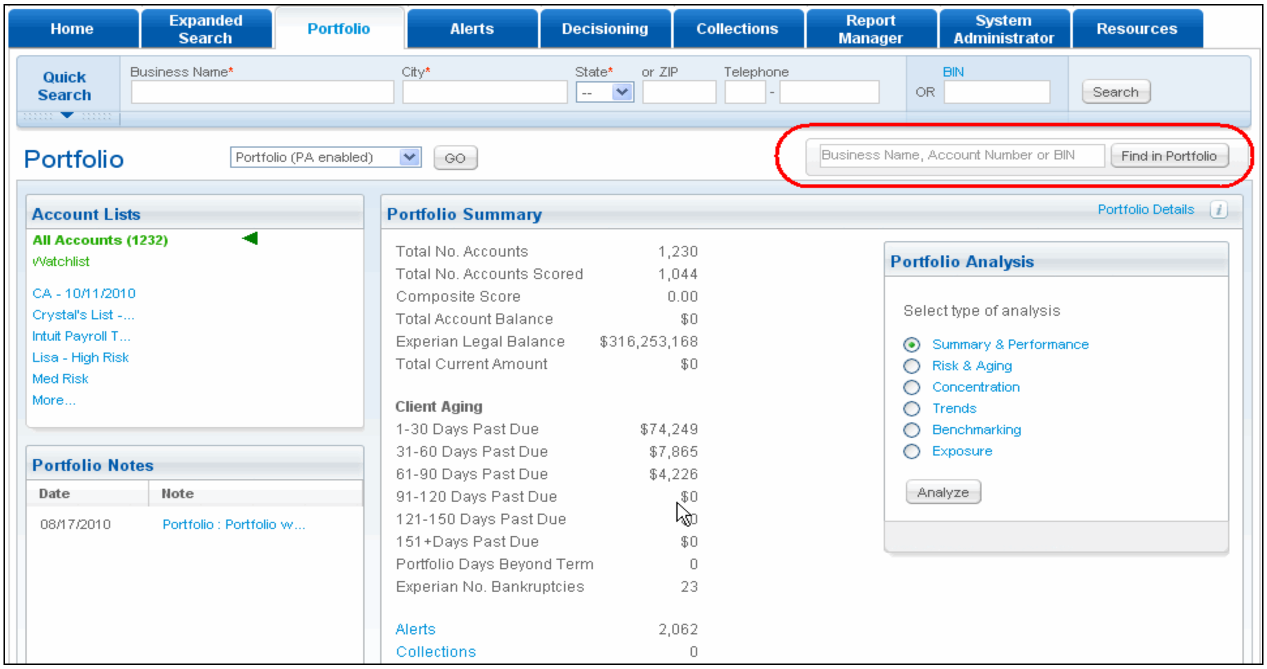
Previously purchased reports will be viewable for 90 days within Report Manager for standard users:

- A - Report accessible for 90 days (Premium subscription users have 180 days). A record (without a link) will show for one year. All columns are sortable. Click the blue "Category" hyperlink to view this report.
- B - User can filter on Category, Date or Group. Select the "Category" or "Date" filter, click "Apply Filter" and the Report List will be updated.

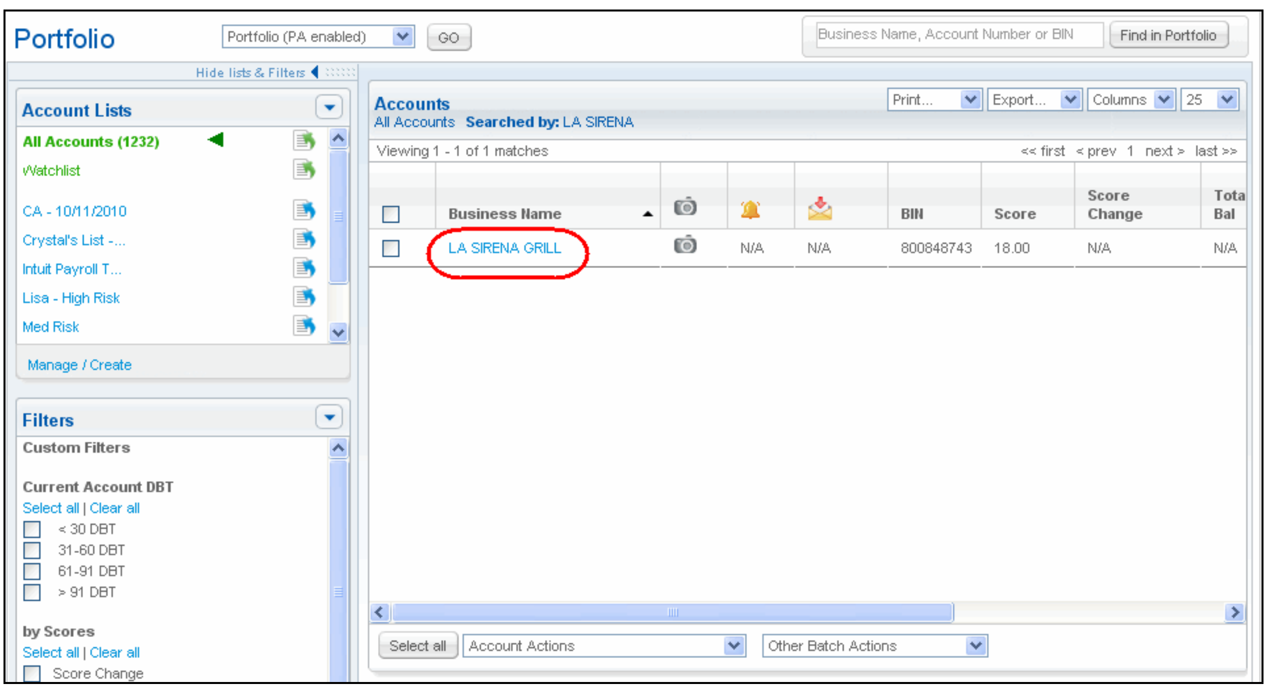


Searching Your Portfolio

STEP 1: Search
Pulling reports establishes accounts. These can be found within the “Portfolio” tab. To search for an account, enter the Business Name, Account Number or BIN in the Search box, click “*Find in Portfolio*” and the matching records will appear.



STEP 2: Click on the Business name



STEP 3: View Account Details

The Account Detail Summary page will be displayed:

- A - Displays Account Detail tabs for quick navigation of account information and a comprehensive view of the customer. Click on “Credit Reports” to view a previously pulled credit report.
- B - Summary information including:
  - Aging
  - Risk/Credit Status
  - Legal Filings
  - Score over time
- C - Pull new report link
- D - Account Actions like those available on the credit report tab