Equifax ePort Commercial Functionality

User Guide

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Confidentiality Agreement

Equifax Information Services LLC
Marketing Communications, H-22
1550 Peachtree Street, N.W.
Atlanta, GA 30309

Welcome to the New ePort with Enhanced Commercial Functionality

Key ePort Benefits

- Get convenient, "one-stop-shop" access to premium consumer and commercial solutions
- No minimum volume requirements
- Help grow your business with fully scalable services and seamless support for your evolving needs
- Gain 24/7 online access to the tools you need—whenever and wherever you need them
- Quickly approve and service customers with real-time access to a robust selection of products
- Improve your customer support metrics with efficient, single-source access to vital information
- Save time by downloading data directly from ePort

Flexible, user-friendly access to advanced credit decisioning tools that help increase profitability and decrease financial risk—that's what you get with the new Commercial functionality of ePort.

It offers a virtual "one-stop-shop" for risk-based decisioning, fraud solutions, plus premium standard features such as administration, security, user preferences and customization that provide you with:

- A secure, personalized web experience for all users
- A common entry point and information source for small businesses to global corporations
- Role and location-based security to control access to information

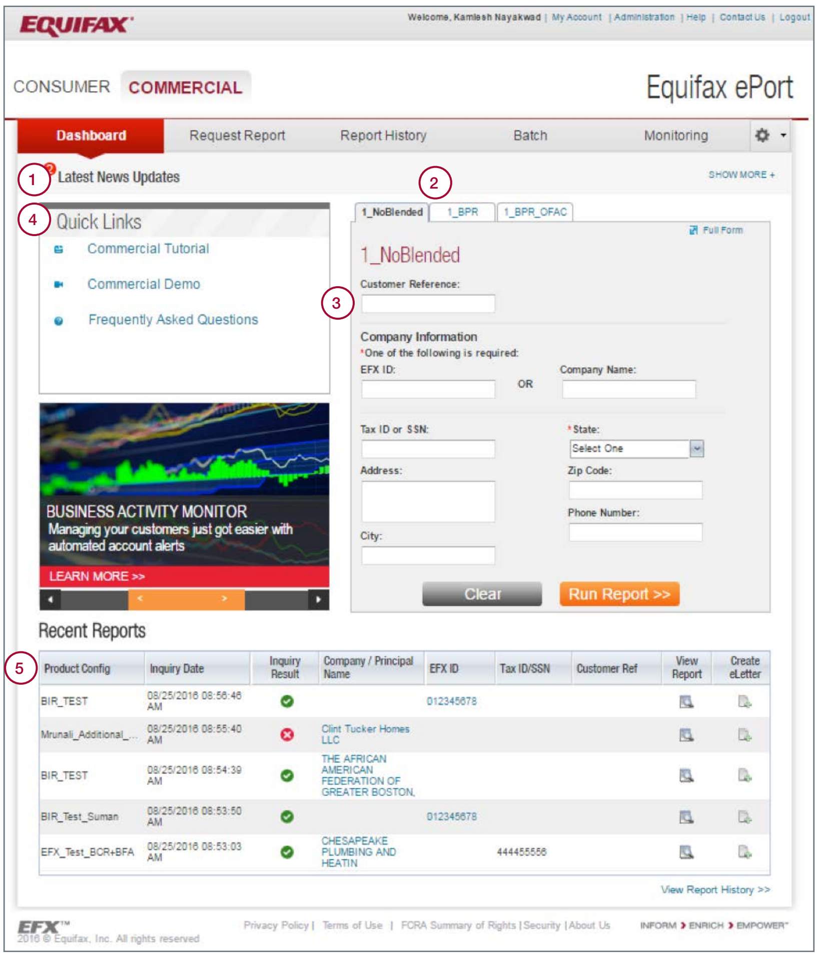
This User Guide was created to help users like you hit the ground running with a better understanding of recent commercial updates to ePort.. You will:

- Explore the refreshed ePort dashboard page
- Understand how to request and view reports
- Learn how to manage your user profile

NOTE: This document is intended for current ePort users. If you are new to ePort and want to know how to gain access to the application, please contact your sales representative, or contact us at customerservice.eportsupport@equifax.com or 877-355-6321.

Dashboard

After logging in to ePort, click the Commercial service tab. You will immediately notice the refreshed look and feel of your new dashboard page. Below is a quick overview of the updated layout.

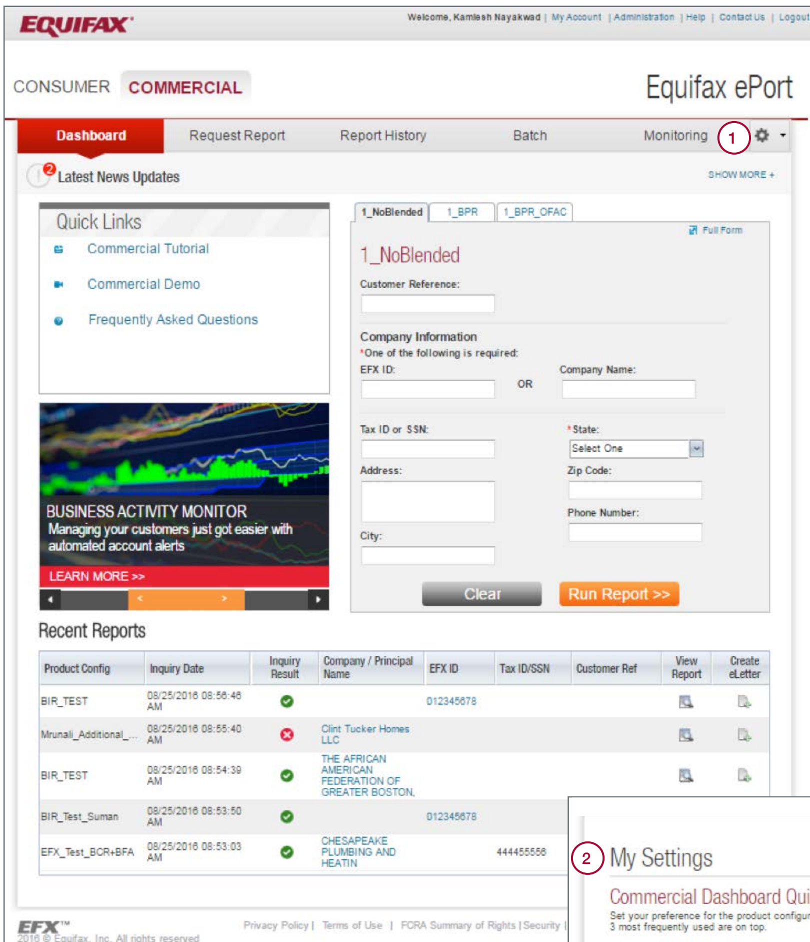


Navigating the Dashboard Page

1. The Latest News Updates banner contains any Equifax news items relevant to Commercial users. Users can read, and then delete, these updates.
2. To expedite report requests, the dashboard page displays up to three tabs, called Quick Forms, for three different report request forms. These Quick Forms are automatically based on your most frequently ordered Product Configurations (previously called Report Profile), but they can be customized, which is explained on the next page.
3. Quick Forms allow you to quickly initiate credit reports and other transactions using as little information as possible. To add more comprehensive application information, click the Full Form link. We will explain this in detail later.
4. Quick Links allow you to easily jump to support documentation and services without navigating through menus or having to remember URLs.
5. Access your last five transactions here. If your company has subscribed to the eLetter service, you can also create customer letters for those transactions by selecting the Create eLetter links.

Quick Form Report Request

To help you quickly initiate report requests, ePort displays three order entry tabs for three different Product Configurations, called Quick Forms. While these are automatically displayed based on your most frequently ordered reports, you can customize this view under My Settings.

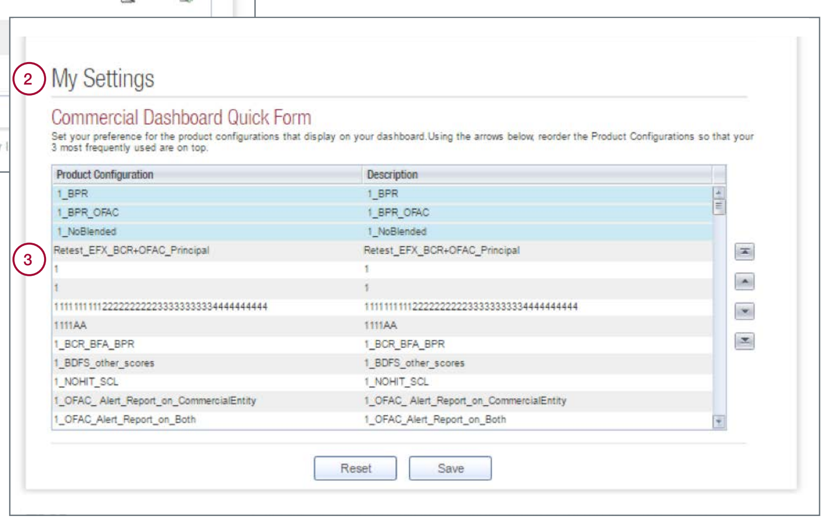


Your New ePort Dashboard Page

Customizing Your Quick Forms

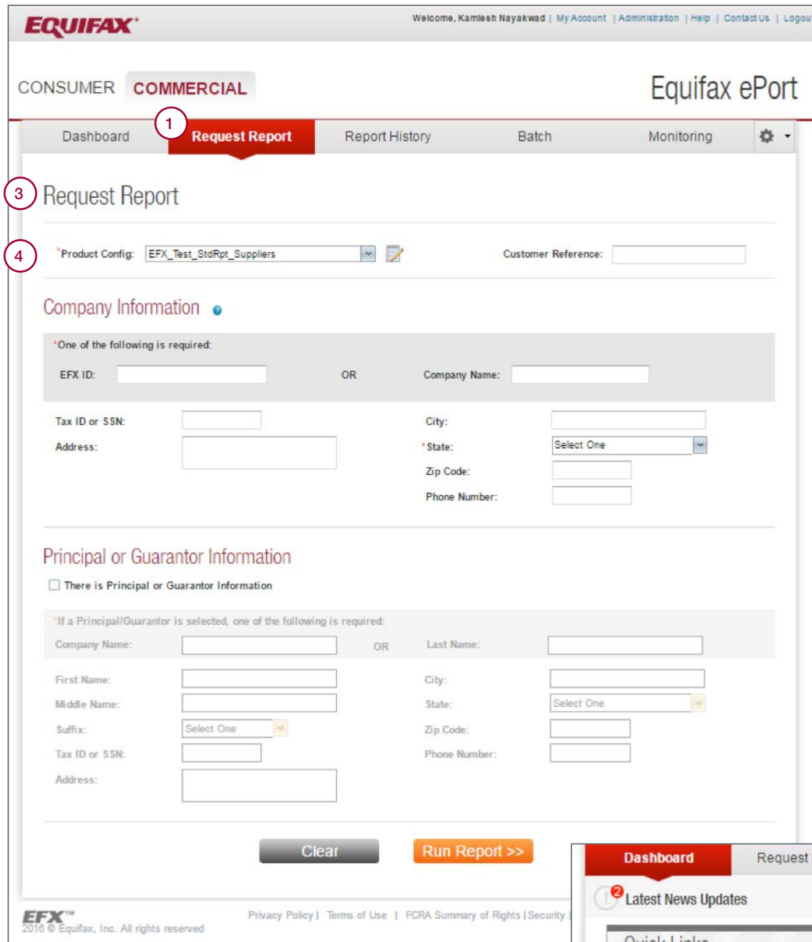
1. Click the settings wheel from the Commercial service navigation menu;
2. Choose My Settings; then
3. ePort will display all Product Configurations accessible to you.

Here, you can rearrange the order of the Product Configurations. The first three items on the list will be displayed on the dashboard page. All other Product Configurations can be easily accessed by clicking Request Report on the service navigation menu and selecting the profile via the Product Configuration dropdown.



Request Report

For your convenience, there are two easy ways to access additional fields when requesting a report. Here you can provide comprehensive application information on the request.

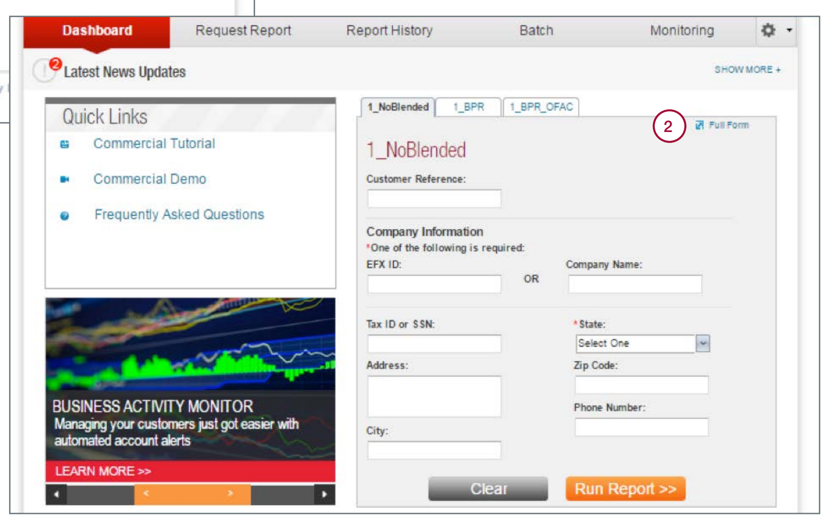


Accessing Additional Request Fields and Product Configurations

Expanding Your Request Entry Fields

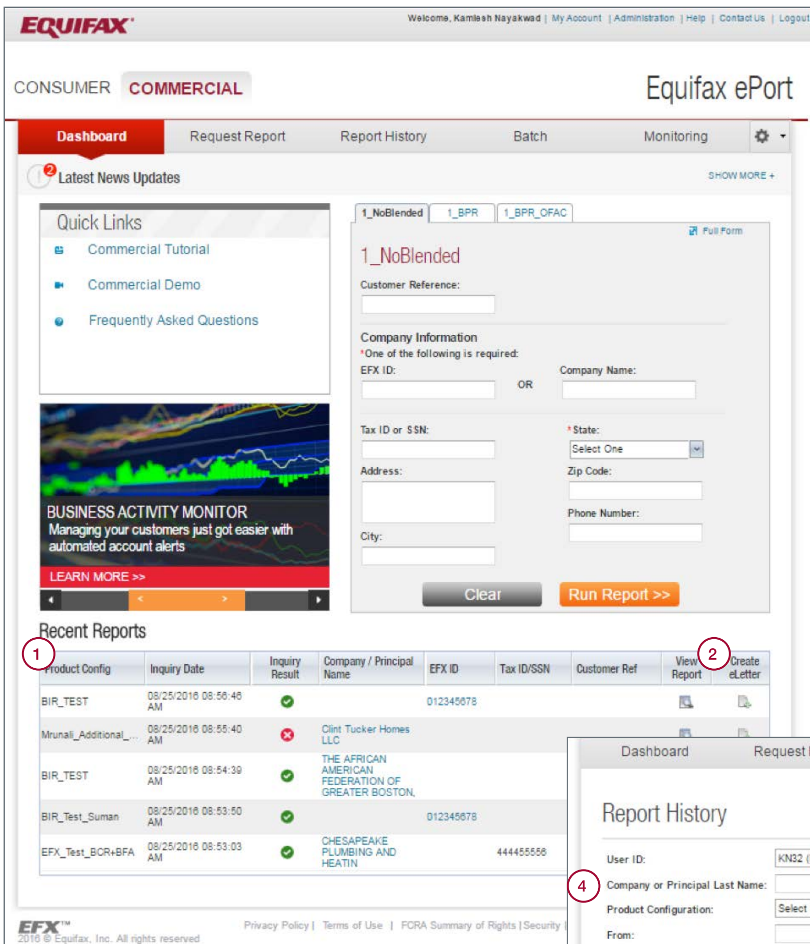
To access additional information fields when ordering reports, you can:

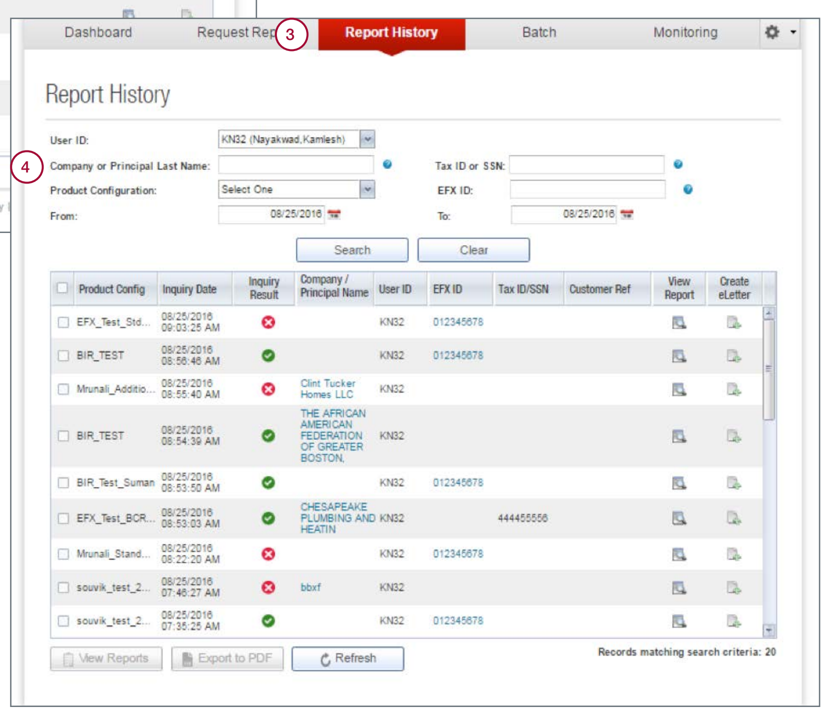
1. Click the Request Report link from the service navigation menu; or,
2. Click the Full Form link displayed on the Quick Form on your dashboard.
3. After clicking either button, the system will display a Request Report screen with additional fields to provide more information for a request.
4. You can easily switch to a different Product Configuration via the Product Configuration dropdown field on the page. Products returned for the selected Product Configuration are determined as part of setup. To view the setup for the selected configuration, simply click the notepad icon.



Viewing Recent Activity

Your new dashboard page features a Recent Reports section that automatically displays your last five transactions, which is convenient when you need to toggle between open customer accounts or deals.





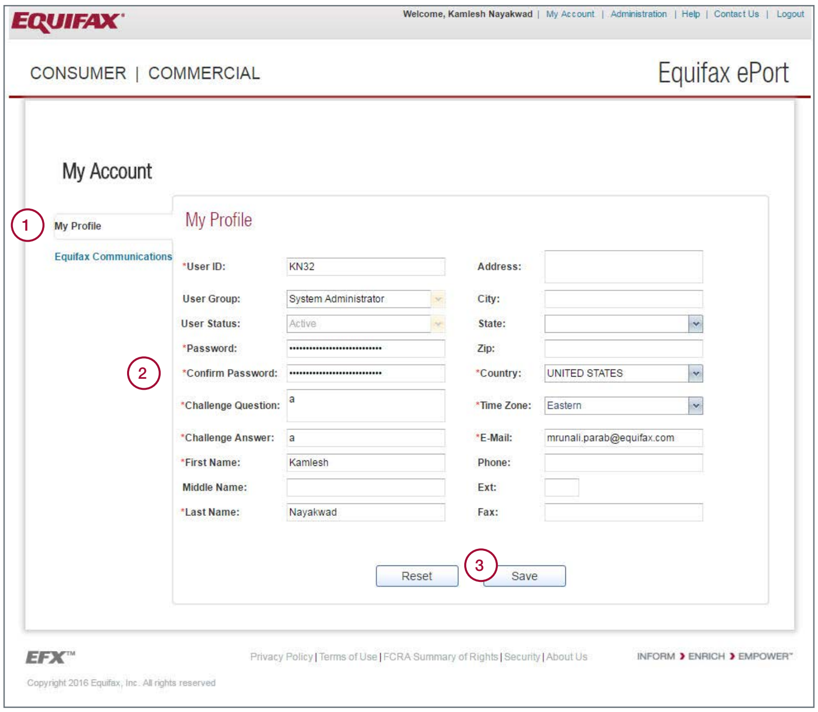
Your New ePort Dashboard Page

Within the Recent Reports section, you can:

1. Quickly review a list of your last five transactions and their status (hit, no-hit, error), then click links to access the full request data submitted and the resulting report.
2. If your company has subscribed to the eLetter feature, create respective customer letters.
3. Click the View Report History link to search up to twelve months of older transactions. You can also view historical reports by selecting Report History from the service navigation menu.
4. The Report History page allows users to narrow transaction search results using several different filters. Click the displayed links to view full request data submitted, view the resulting report or generate customer letters. Users can also download and print the reports from their list.

My Profile

Users can update their email address and other contact information using this screen.



Managing My Profile

Choose the My Account link in the global navigation menu and click My Preferences.

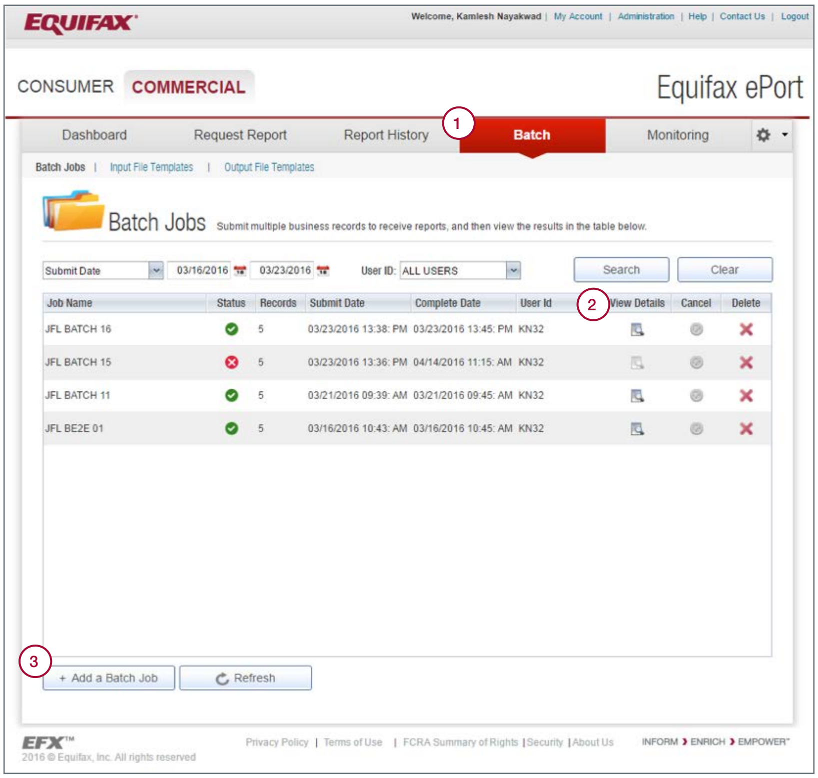
1. Choose My Profile to edit contact information.
2. In addition to updating contact information, users can also change passwords and challenge questions/answers.
3. Click Save to save any changes.

Password Reset: For security reasons, only users have access to change their passwords. If you forget your password, please follow the Forgot Password link instructions.

Administrators can start the Reset Password process but cannot view or change user passwords.

Batch Processing

You can request up to 5,000 reports at once using the Batch link on the Commercial service navigation menu.

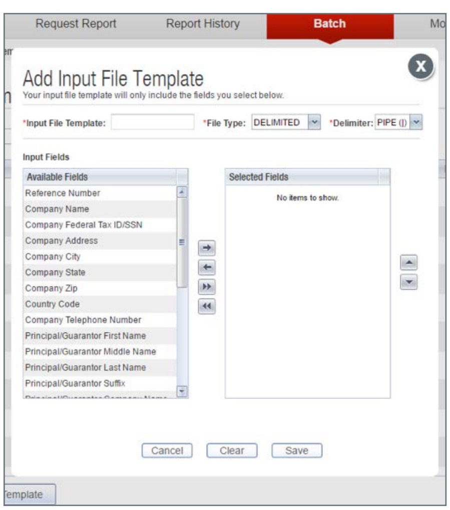


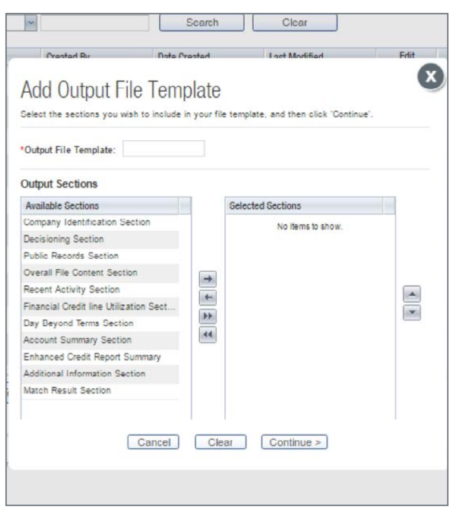
Requesting Multiple Reports

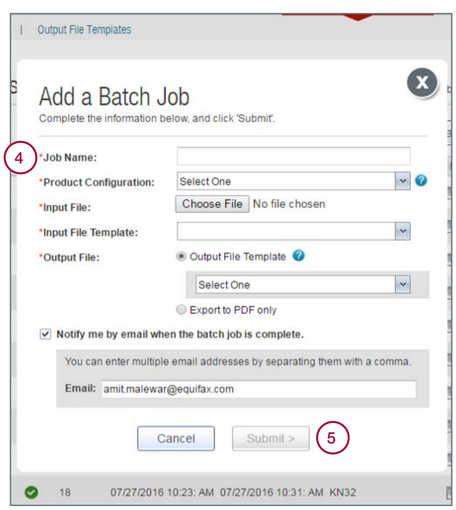
Using Batch Upload

Choose the My Account link in the global navigation menu and click My Preferences.

1. When you click the Batch link, you will be shown a list of previously processed batch jobs.
2. You can review results of these batch jobs by selecting View Details.
3. To submit a new batch click Add a Batch Job. **NOTE:** Before submitting a new batch, be sure you have defined the Input File Template for the input file you'll be uploading for processing. If you require delimited file output, you must also define an Output File Template.
4. You will be prompted to add Job Name, choose a Product Configuration, upload your Input File, choose your Input File Template, select your desired Output File and select your e-mail notification preferences.
5. Once all fields are complete, click Submit.

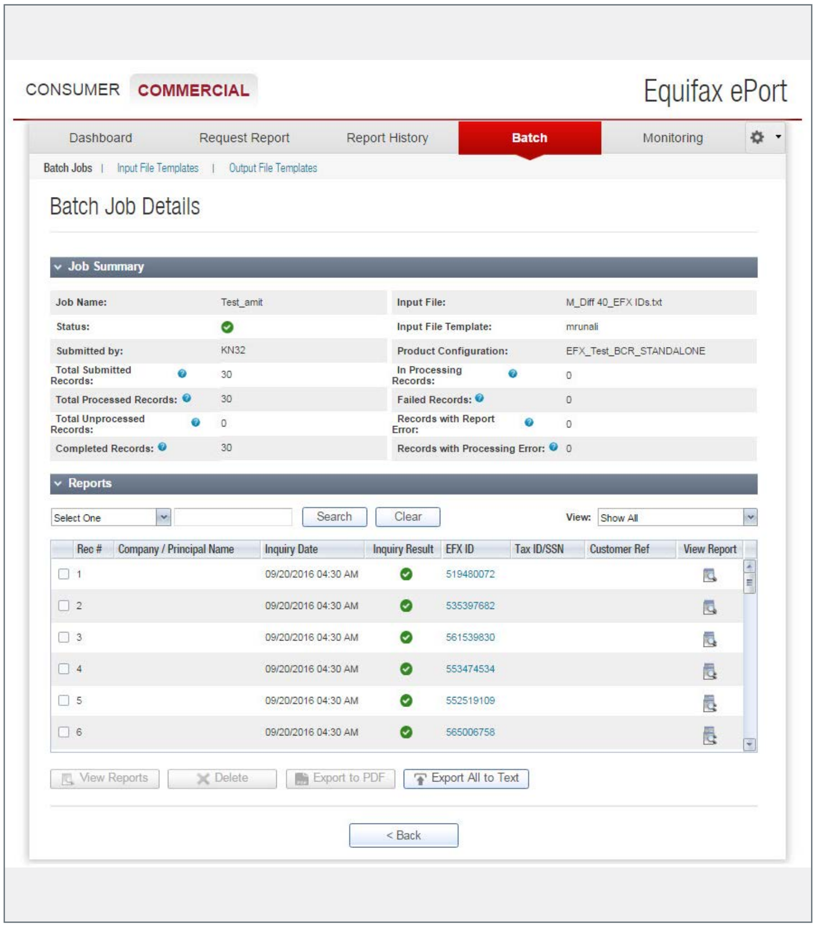






Batch Viewing Results

Within your batch file results, ePort will display all reports that were requested in a batch file.



Requesting Multiple Reports

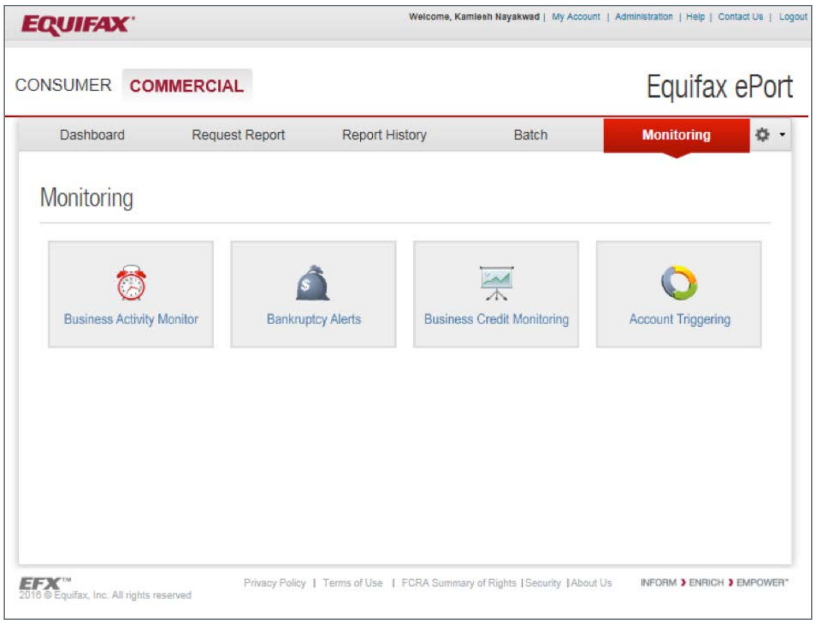
Viewing Batch Results

From the Batch Job Details page, you can view the request data, view the report results, export the reports to PDF or export the report data into a delimited text file (an additional fee applies for delimited output).

Monitoring

Our new Business Activity Monitor™ (BAM) is available in the Commercial tab in ePort with the same UI with the same UI design that users currently enjoy. You can also continue to access Bankruptcy Alerts, Business Credit Monitoring and Account Triggering products, but with a refreshed UI design.

Commercial monitoring products are optional. Additional fees apply.

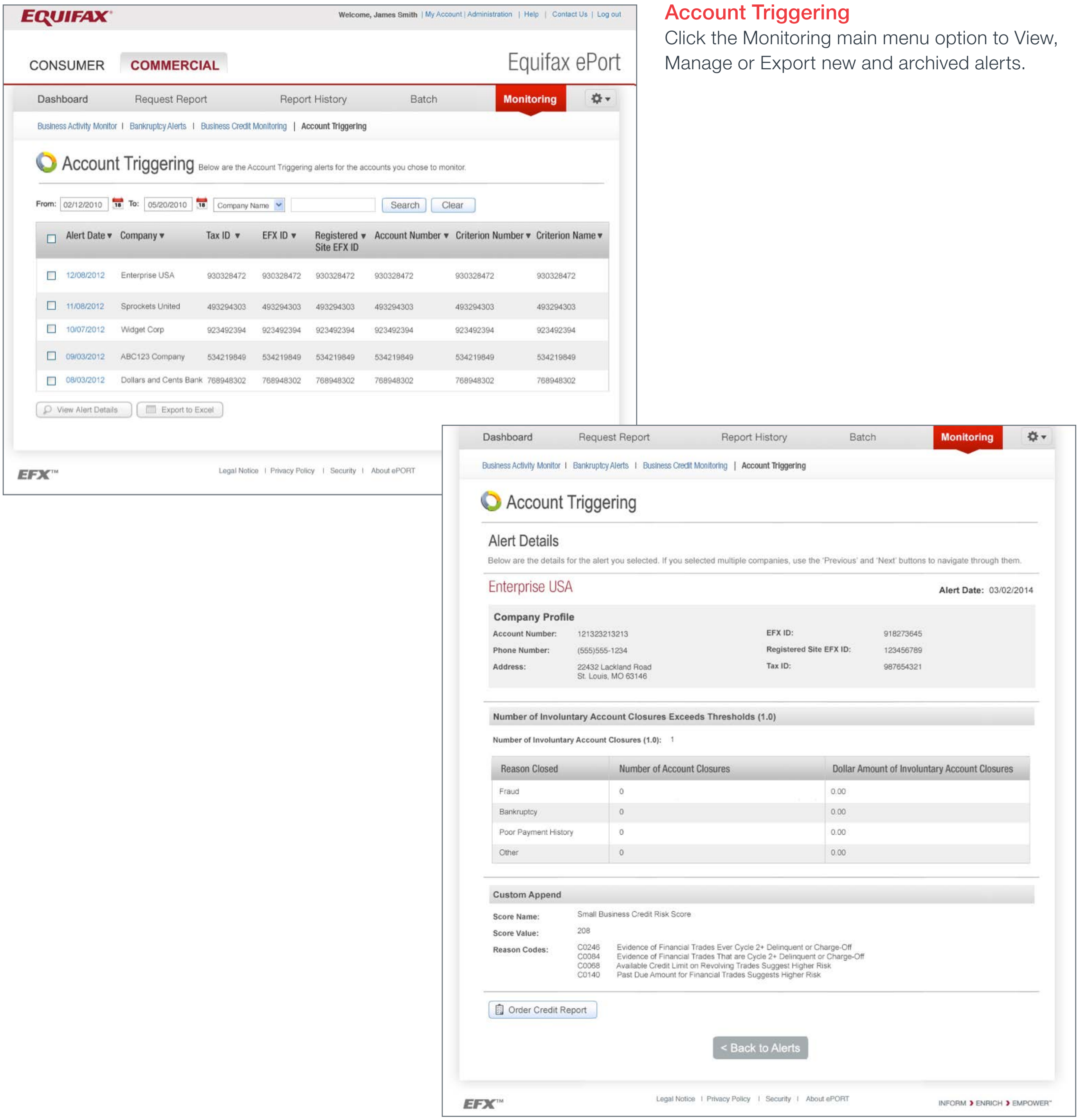


Business Activity Monitor™

Click the Monitoring main menu option to view, manage or export new and archived alerts.
A separate user guide has been created for Business Activity Monitor, which is available here.

Monitoring

Monitoring continued.

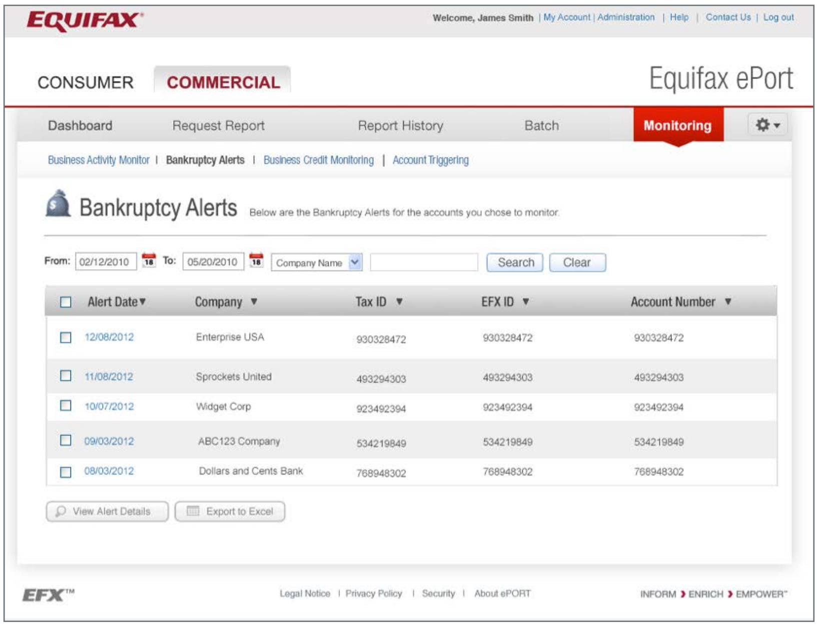


Account Triggering

Click the Monitoring main menu option to View, Manage or Export new and archived alerts.

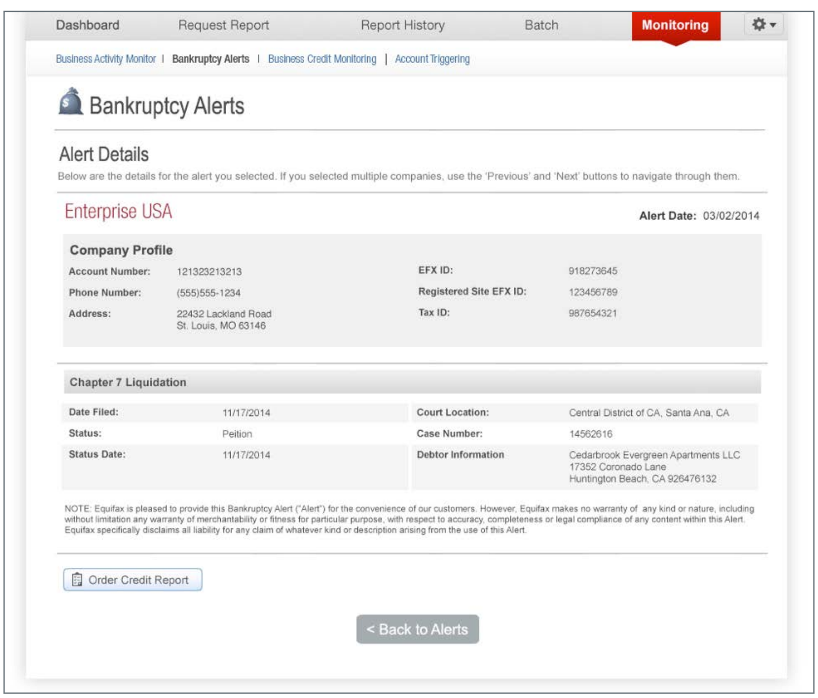
Monitoring

Monitoring continued.



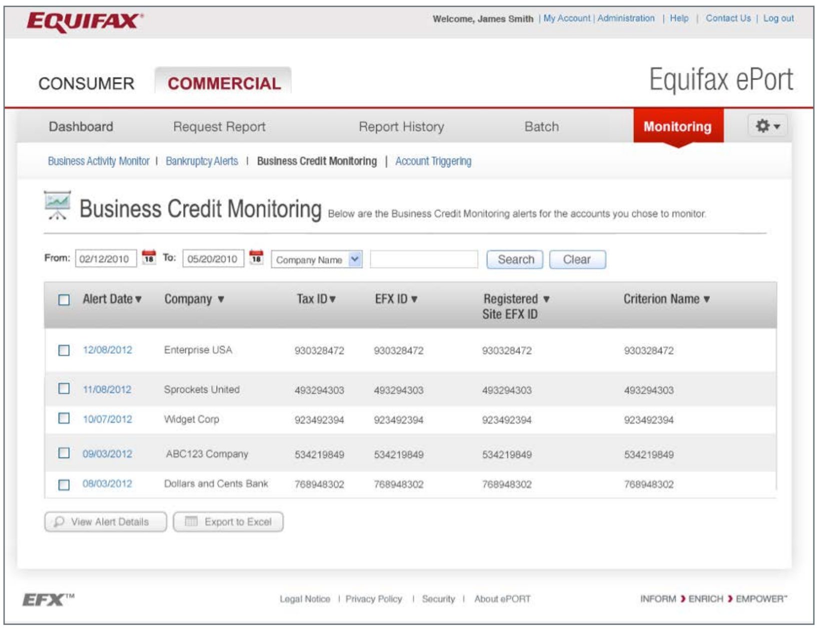
Bankruptcy Alerts

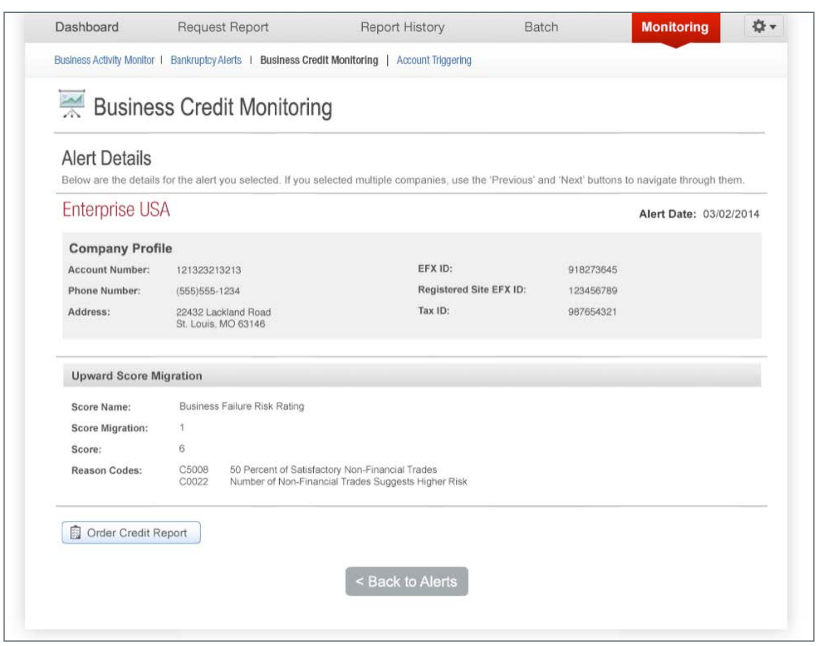
Click the Monitoring main menu option to View, Manage or Export new and archived alerts.



Monitoring

Monitoring continued.





Business Credit Monitoring

Click the Monitoring main menu option to View, Manage or Export new and archived alerts.