The NEW Equifax ePort with Enhanced Commercial Functionality

Frequently Asked Questions

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Overview

What is the new, enhanced Commercial functionality in ePort?

In general, we've streamlined and simplified the Commercial functionality in ePort so you can get the information and answers you need faster than ever before. Current users of ePort Consumer service will now enjoy a similar, consistent experience within the Commercial tab. The Commercial dashboard page has been redesigned to feature Quick Forms for your three most frequently ordered reports, while also retaining easy access to the more comprehensive Full Form report request alternative. Other updates include:

- Easy access to most recently requested reports directly from the dashboard.
- More report history search options
- Simplified report download/print capabilities
- Streamlined batch processing feature
- Enhanced (optional) eLetter functionality
- More intuitive user management functionality for Administrators

Will ePort URL change?

No, the URL will not change. You can use the same URL you've always used to access ePort.

Will I need a new account or a new UserID/password to login to the Commercial functionality within ePort?

No, you do not need a new account, or new login credentials. Your existing account, UserID and password will be active on the new ePort.

What browsers work best with the new interface?

Internet Explorer version 9 or higher, Mozilla Firefox and Google Chrome.

Do I have access to any new products or services with the enhanced Commercial functionality on ePort?

Yes—through the Monitoring tab you now have access to Business Activity Monitor™ (BAM). Other Equifax monitoring products (Bankruptcy Alerts, Business Credit Monitoring, and Account Triggering) will continue to be available for a limited time.

Note: Commercial monitoring products are optional; additional fees apply.

Do I lose access to any products or services with the enhanced Commercial functionality on ePort?

No, you will not lose access to any products or services you previously used.

For system administrators, are the administrative rights changing?

Yes, the way system administrators manage users will change, but for the better. The new ePort features User Groups, which allows system administrators to group users with similar permissions to Product Configurations (previously called Report Profiles) and features rather than assigning product configurations and access to one user at a time. For more information on User Groups, please see the User Group section of this document and ePort Administrator User Guide included in the new Commercial tab of ePort.

What is a Quick Link?

Quick Links is a new section included in the new Commercial tab of ePort.

What is the benefit of Quick Forms?

To help you initiate report searches faster, we shortened the report request forms so you only have to enter the minimum required information. You spend less time tabbing through fields that you don't need or can't fill, and get faster results.

What if I need all the request fields, can I still access the expanded request form?

Yes. To view and access all the request fields, simply click the Full Form link in the top right corner of the Quick Form or Request Report in the Commercial Service Navigation Menu. This will take you to the complete form where you can enter additional details.

Why do I only see three Quick Form tabs, when I have access to more reports?

Equifax ePort automatically includes your three most frequently used Product Configurations (previously called Report Profiles) here. That way, you can go straight to these request forms without spending extra time navigating through to another screen. But, Quick Form tabs are also customizable if you want to change them. Simply click the Settings Wheel on the Commercial Service Navigation Menu, then My Settings. Here you can choose different Product Configurations, and know that the top three configurations on your list will be the ones featured on your dashboard page—in that order. Just click Save to finalize the change and click Dashboard to return to the dashboard page.

New Features

Can I change the three Quick Form tabs on my home page dashboard?

Yes, you can customize your dashboard page view to include the three Quick Form Product Configuration tabs (previously called Report Profile) you prefer. Simply click the Settings Wheel on the Commercial service navigation menu, then My Settings. Here you can choose different product configurations, and know that the top three configurations on your list will be the ones featured on your dashboard page— in that order. Just click Save to finalize the change and click Dashboard to return to the dashboard page.

How do I access/review my report history, and access specific reports?

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. Simply scroll down to the bottom of your dashboard to the Recent Reports section, where you can:

- Quickly review a list of your last 5 transactions and their status (hit, no-hit, error), then click links to access the full request data submitted and the resulting report
- Create customer letters for each transaction using the eLetter feature (optional, additional fees apply)
- Click the View Report History link to search up to twelve months of older transactions

The Report History page allows users to narrow transaction search results using several different filters, then click links to view full request data submitted, view the resulting report or generate customer letters. Users can download and print the reports from their list. Also, if you belong to a User Group with permission to review transactions run by others, your User ID dropdown will be enabled to select one or more users other than yourself.

All I really need to do is access Commercial reports— how do I do that?

Once you login to ePort, click the Commercial service tab. You can request reports directly from the ePort Commercial dashboard. Quick forms for your top three most commonly requested reports will be displayed and those may be edited by following the Quick Form tab instructions above.

What's the User Group feature all about?

The new User Group administrator tool is designed exclusively for system administrators. This tool allows administrators to more easily manage users and their permissions. Now, any changes to Product Configurations (previously called Report Profiles) or permissions can be made at a group level and not at a user level, which simplifies administrative tasks.

General Questions

Who do I contact if I have questions about my account or ePort?

Start by contacting your system administrator, who should have access to all administrative features on ePort. Or you can contact Equifax ePort Customer Service at customerservice.eportsupport@equifax.com or 877-355-6321. Be sure to specify that your question relates to the Commercial tab of ePort.

What does it mean to be a system administrator?

Designated system administrators are the only users within a company who can make changes to User Groups. These people are "super users," since they can access every feature available on the new ePort interface. As internal users evolve and change over time, it will be the system administrator's responsibility to ensure they have appropriate access to the product configurations and permissions they need. Likewise, it is important that system administrators monitor user access for inappropriate usage, and restrict or terminate access as needed, such as when a user leaves your organization.

What is recertification? Why do users need to be recertified?

Recertification is the process of evaluating each User ID and determining whether it should remain active, be changed to inactive, or deleted from ePort. This process helps ensure that only valid User IDs remain active in the system, thus providing additional security. Only Administrators can recertify users.