



**Advantage Credit**

Credit Reporting Services

www.advcredit.com 800-670-7993

## Advantage Credit **Management Reports**

Administrators and those with access to view invoices can use the **Management Reports** feature to get daily and weekly activity summaries for all users in their company. To access this feature from the main desktop, click the **Management Reports** link under the **Tools** section

### Management Reports

Please select a report.

<b>Account Activity</b>	<b>Quality Control</b>
<input type="radio"/> Activity Summary	<input type="radio"/> Fraud Alerts Triggered on Credit Reports
<input type="radio"/> Products Ordered	<input type="radio"/> Average Scores by Region
<input type="radio"/> Service Requests Ordered	<input type="radio"/> Credit Scores
<input type="radio"/> Credit Card Transactions	<input type="radio"/> Undisclosed Debt Notifications

**Options:**

...

This screen allows you to generate daily, weekly, and overall report summaries within a given date range



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## Activity Summary

This screen allows you to generate daily, weekly, and overall report summaries within a given date range.

### Management Reports

<b>Account Activity</b>	<b>Quality Control</b>
<input checked="" type="radio"/> Activity Summary	<input type="radio"/> Fraud Alerts Triggered on Credit Reports
<input type="radio"/> Products Ordered	
<input type="radio"/> Service Requests Ordered	
<input type="radio"/> Credit Card Transactions	

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**Options:**

From:   To:   [Download CSV Report](#)

**Filter By:**

User

Team

Account

**Show subtotals:**

**View Summary only** *(hide individual transactions)*

**Combine credit file charges**

**Group by department**

### Options

- **User** - Allows you to see an activity summary for all or a specific user. Selecting **ALL** will not include users in sub-accounts.
- **Team** - Allows you to see an activity summary for all teams or a specific team. Invoice items may appear multiple times if a user belongs to multiple teams.
- **Account** - Allows you to see an activity summary for all users in a specific branch. Selecting **ALL** will include all users in both the master and sub accounts.
- **Show Subtotals** - You can add subtotals to the report and the subtotals can be sorted Daily, Weekly, or Monthly. If you filter by User the options None and User also appears. If you filter by Team the option Team will appear. If you filter by Account the options None, Account and User appears.
- **View Summary only** - If you would like to hide all the individual charges and view a summary only, check this box. Note: if you check this box the Combine Credit File Charges will become disabled.
- **Combine Credit file charges** - Checking this box combines multiple charges within a single credit file into one entry.
- **Group by department** - Check this box to group activity by department. This is disabled if you filter by Team or Account.

## Products Ordered

This screen allows you to generate summaries of products ordered within a given date range.

The screenshot shows the 'ADVANTAGE CREDIT' interface with the 'Management Reports' section active. Under 'Management Reports', there are two columns of radio button options: 'Account Activity' and 'Quality Control'. 'Products Ordered' is selected under 'Account Activity'. Below these are 'Options' for date range (From: 11/01/2014, To: 11/30/2014), Product (Credit), State (--- ALL ---), and checkboxes for 'Group by user' and 'View sub-accounts' transactions'. A dropdown menu for sub-accounts is open, showing 'ALL ACCOUNTS', 'Advantage Test Account - 1301099', 'Evergreen Credit - Test Acct - 1101099', and 'TEST - 1401099'. Buttons for 'View Report' and 'Cancel' are at the bottom.

### Options

- Product - There are two options to choose from, Credit and Flood.
- State - Filter the products ordered report by selecting the desired State.
- Group as User - Check this box to group the products ordered by user.
- View sub-accounts' Transactions - Check this box to include sub accounts in the report. If you would like to select multiple users but not all, hold down the Ctrl key and click on the sub-accounts you would like to include.

## Service Requests Ordered

This report allows you to generate report summaries of service requests, like Fact Act Mail Merge, that were ordered within a given date range.

## Fraud Alerts Triggered

This screen allows you to generate report summaries of fraud alerts that were triggered on credit reports within a given date range.

The screenshot shows the 'ADVANTAGE CREDIT' interface. At the top, there is a navigation bar with 'Main' and 'Management Reports'. Below this is a 'Management Reports' section with two columns of radio buttons: 'Account Activity' and 'Quality Control'. Under 'Quality Control', 'Fraud Alerts Triggered on Credit Reports' is selected. Below the radio buttons is an 'Options:' section. It includes 'From' and 'To' date pickers set to 10/01/2014 and 10/31/2014, with a 'Download CSV Report' link. An 'Alert Type' dropdown menu is open, showing options: 'All Fraud Alerts', 'Equifax Fraud Products', 'Experian Fraud Products', 'TransUnion Fraud Products', and 'OFAC Products'. There are also checkboxes for 'Include no-hits', 'Include general alerts', and 'View sub-accounts' transactions'. The 'View sub-accounts' transactions' checkbox is checked, and a sub-account list is visible, including 'Advantage Test Account - 1301099', 'Evergreen Credit - Test Acct - 1101099', and 'TEST for Catalyst - 1401099'. At the bottom right, there are 'View Report' and 'Cancel' buttons.

### Options

- Alert Type - This drop down gives you the choice of All Fraud Alerts, Equifax Fraud Alerts, Experian Fraud Alerts, TransUnion Fraud Alerts, and OFAC products.
- Include No-Hits - Shows available and clear fraud records.
- Include general alerts - Checking this box will bring up alerts that do not necessarily indicate fraud, such as active duty alerts and credit data suppression.
- View sub-accounts' transactions- Check this box to include sub accounts. If you would like to select multiple users but not all, hold down the Ctrl key and click on the sub-accounts you would like to include.

## Average Scores by Region

For companies which span across different regions there is an ability to look up average credit scores by bureau for a particular region.

The screenshot shows the 'ADVANTAGE CREDIT' interface. At the top, there is a navigation bar with 'Main' and 'Management Reports'. Below this is a 'Management Reports' section with two columns of radio button options: 'Account Activity' and 'Quality Control'. Under 'Quality Control', 'Average Scores by Region' is selected. Below the options is a section for 'Options' with date pickers for 'From' (10/01/2014) and 'To' (10/31/2014), a 'State' dropdown menu set to '--- ALL ---', and two checked checkboxes: 'Show cities' and 'Show zip codes'. At the bottom right are 'View Report' and 'Cancel' buttons.

- State- Allows you to see a report based on all states or only one state.
- Show cities- Check this box to break up the report by cities.
- Show zip codes- Check this box to break up the report by zip codes. If show cities is checked than the report will be broken up by cities first

## Credit Scores

- This screen allows you to generate a report listing all the credit scores pulled by the company within a certain period. Credit analyzer will show the possible score increase.