

Responsibility Lead Status Sub Status Lead Owner Created By
New Lead Stephan Ruby Stephan Ruby, 4/12/2024, 8:59 ...

New Lead

Attempting Contact

Gathering Info

Converted

 Mark Status as Complete

PRIMARY

Name	Core ARP
Language	
FDR Applicant Id	
Lead State	

Day/Mobile Phone	(666) 666-9001
Lead Status	New Lead
Sub Status	
Lead Owner	Stephan Ruby

CLIENT DETAILS

Applicant DOB	1/1/1951
Applicant SSN	
Physical State	SC
Physical Address Line 1	123 MAIN STREET
Physical City	TEMPE
Physical Zip Code	85288

Secondary Phone	(666) 666-9001
Email	sruby@achieve.com
Mailing State	AZ
Mailing Address Line 1	123 MAIN STREET
Mailing City	TEMPE
Mailing Zip Code	85288

CO-APPLICANT

Co App Full Name	
Co-App First Name	
Co-App Last Name	
Co-App DOB	
Co-App SSN	

Co-App FDR Applicant ID	
Co-App Email	
Co-App Phone	
Co-App Cell Phone	

Fields that need to
be filled out

Fields that grant
the best results but
are not required

Prospect Insights



OPEN DOCUMENTS

Pull Credit

Debt Accounts (0)

Conditions

Programs

Web Services

WSL-000545

Service Name

Created Date

WSL-000546

Comments



Please note, in order to pull co-applicant credit, the main applicant must be triggered and get a successful response back for the co-app credit pull to appear (this is on the next page)

Co-app credit pull required fields

Lead Core ARP

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New Lead Stephan Ru... Stephan Ruby, 4/12/2024, 8:59 ...

New Lead Attempting Contact Gathering Info Converted ✓ Mark Status as Complete

▼ PRIMARY

Name	Core ARP	Day/Mobile Phone	(666) 666-9001
Language		Lead Status	New Lead
FDR Applicant Id		Sub Status	
Lead State		Lead Owner	Stephan Ruby

▼ CLIENT DETAILS

Applicant DOB	1/1/1951	Secondary Phone	(666) 666-9001
Applicant SSN		Email	sruby@achieve.com
Physical State	SC	Mailing State	AZ
Physical Address Line 1	123 MAIN STREET	Mailing Address Line 1	123 MAIN STREET
Physical City	TEMPE	Mailing City	TEMPE
Physical Zip Code	85288	Mailing Zip Code	85288

▼ CO-APPLICANT

Co App Full Name	Co-App FDR Applicant ID
Co-App First Name	Co-App Email
Co-App Last Name	Co-App Phone
Co-App DOB	Co-App Cell Phone
Co-App SSN	

Prospect Insights

ATTORNEY REPRESENTED

OPEN DOCUMENTS

Pull Credit

Debt Accounts (0)

Condition and Acknowledgements (0)

Program Terms Estimates (0)

Web Service Logs (3+)

WSL-00054817
Service Name:
Created Date:
6/12/2024, 4:18 PM
WSL-00054816

Program Generate



Fields that need to be filled out



Fields that grant the best results but are not required





Responsibility Lead Status Sub Status Lead Owner Created By
New Lead Stephan Ruby Stephan Ruby, 4/12/2024, 8:59 AM

New Lead

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[✓ Mark Status as Complete](#)

File Readiness

Readiness Error
Required info needed.
[Open List](#)

Debt Accounts
You're ready for Conversion! [Open List](#)

Condition and Acknowledgements
You're ready for Conversion! [Open List](#)

Recalc Required
Complete

NECA
Complete
[View NECA Status](#)

PRIMARY

Name	Core ARP
Language	
FDR Applicant Id	4957858d28e5b26
Lead State	

Day/Mobile Phone	(666) 666-9001
Lead Status	New Lead
Sub Status	
Lead Owner	Stephan Ruby

CLIENT DETAILS

Applicant DOB	1/1/1951
Applicant SSN	
Physical State	SC
Physical Address Line 1	123 MAIN STREET
Physical City	Charleston
Physical Zip Code	29401

Secondary Phone	(666) 666-9001
Email	sruby@achieve.com
Mailing State	AZ
Mailing Address Line 1	123 MAIN STREET
Mailing City	TEMPE
Mailing Zip Code	85288

Prospect Insights



OPEN DOCUMENTS

Submit to UW

Debt Accounts (3)

DEBT-0007310
Account Number: 519794320987
Account Type: Credit Card
Creditor Name: WELLS FARGO

After pull screen
auto refreshes and
looks like this