

Lead

Core ARP

Edit

Raise an Issue

Responsibility

Lead Status
New Lead

Sub Status

Lead Owner
Stephan Ru...

Created By
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

Prospect Insights

ATTORNEY REPRESENTED

OPEN DOCUMENTS

Pull Credit

Debt Accounts (0)

Condition

Program

Web S

WSL-000548

Service Name

Created Date

WSL-000548



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)

Fields that need to be filled out

Fields that grant the best results but are not required

Co-app credit pull required fields

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Stephan Ruby, 4/12/2024, 8:59 ...

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PRIMARY

Name

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Day/Mobile Phone

(666) 666-9001

Language

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

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:

Program Generate


Created Date:

6/12/2024, 4:18 PM

WSL-00054816

Fields that need to be filled out

Fields that grant the best results but are not required



Lead

Core ARP

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Raise an Issue

Responsibility

Lead Status
New Lead

Sub Status

Lead Owner
Stephan Ruby

Created By
Stephan Ruby, 4/12/2024, 8:59 AM

New Lead

Attempting Contact

Gathering Info

Converted

✓ 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	Day/Mobile Phone	(666) 666-9001
Language		Lead Status	New Lead
FDR Applicant Id	4957858d28e5b26	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	Charleston	Mailing City	TEMPE
Physical Zip Code	29401	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