



Responsibility

Lead Status

Sub Status

Lead Owner

Stephan Ruby

Created By

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

New Lead

Attempting Contact

Gathering Info

Converted

 Mark Status as Complete

▼ PRIMARY

Name

Language

FDR Applicant Id

Lead State

Day/Mobile Phone Lead Status

Sub Status

Lead Owner Stephan Ruby

▼ CLIENT DETAILS

Applicant DOB Applicant SSN Physical State SC Physical Address Line 1 123 MAIN STREET Physical City TEMPE Physical Zip Code 85288 Secondary Phone Email 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

Prospect Insights



OPEN DOCUMENTS

Pull Credit

Debt Accounts (0)

Conditions

Programs

Web Services

WSL-000545

Service Name

Created Date

WSL-000546

Last Modified



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

Responsibility Lead Status Sub Status Lead Owner Created By
New Lead 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



Fields that need to
be filled out



Responsibility Lead Status Sub Status Lead Owner Created By
New Lead Stephan Ruby 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
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