

Certified Credit

Completed by E360 Help Desk

Screen shots, with identifier above the screen shot, so QC person(s) can identify what the screen shot is for.
Emails requesting account set up/termination must be added to the ticket for audit purposes.

Setup:

Login to <https://certifiedcredit.meridianlink.com/custom/login.aspx>

Click on “User Setup” from the Tools section from the Home page:



This will open the User Setup page, select “Add” button:



This will open a “New User” pop-up window, complete highlighted fields. See Appendix B for Access Permission by Role.

Department: Branch Cost Center for the user

Job Title: leave blank

Full Name: First Last name

Login: first initial last name

Phone: Office number

Fax: Fax Number

Login: FirstInitialLastName

Email: email address

Cell Phone: users cell number (used for 2 party authentication)

Full Address: leave blank

Click on “Set Password Manually”

Password: **HRM default**

NEW USER

USER EDIT RESTRICTIONS

Save **Close**

PROFILE

Department	Job Title	
<input type="text"/>	<input type="text"/>	
Full Name 	Phone	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>
Login 	Email	Cell Phone (For auth code) 
<input type="text"/>	<input type="text"/>	<input type="text"/>
Full Address? more detail		
<input type="text"/>		

SET PASSWORD AUTOMATICALLY **SET PASSWORD MANUALLY**

Message (this will be displayed on the login page)

Locked ?

Password   Re-type Password  

[Generate Password](#)

Force user to change password on the first system login

Password Requirements:

- Must be 8 to 15 characters in length
- At least 1 digit (0-9) and 1 letter (A-Z)
- Cannot contain * & " < >

User Preferences

Automatically print report on new order? 

SET PASSWORD AUTOMATICALLY **SET PASSWORD MANUALLY**

An email will be sent to the user with a link to let them choose their password.

If the user is given access to credit reports ordered by other users, please remember to enter the user's cell phone with an authentication code.

In “Access Permission” check “Is this user an administrator”, this will check all boxes in yellow, then remove check mark “Is this user an administrator”

User Preferences

Automatically print report on new order? ?

Access Permission

Is this user an administrator?
 Can view ordered products belonging to other users?
 Can view billing invoice of all users?
 Can view transaction charges?

Report Ordering Supplement Ordering Rescore Ordering Allow Re-Order After ? 1 day Allow Soft Pull Re-Order After ? 1 day

Change “Rescore Ordering” to “No access”

Report Ordering Supplement Ordering **Rescore Ordering** Allow Re-Order After ? 1 day Allow Soft Pull Re-Order After ? 1 day

Special Options ?

BILLING INFORMATION

Require credit card payment on each order

Click “Save”

Find user in “User Edit” list and “click” on the name

On the “Restrictions” tab, check “WORDER” box to ensure user cannot order reports from the website. The “TAX” is defaulted. Click “Save”

USER EDIT **RESTRICTIONS**

RESTRICTIONS

<input type="checkbox"/> -EXP	Disable Experian credit reports ordering unless customer is configured to always order.
<input type="checkbox"/> -TUC	Disable TransUnion credit reports ordering unless customer is configured to always order.
<input type="checkbox"/> -EQF	Disable Equifax credit reports ordering unless customer is configured to always order.
<input type="checkbox"/> -WEB	Disable web access to system. I.e., access allowed only through credit interface.
<input type="checkbox"/> -FLD	Disable flood report ordering.
<input type="checkbox"/> -FNMA	Disable Fannie Mae access for credit report ordering and reissuing.
<input type="checkbox"/> -CX	Disable ordering CreditXpert Wayfinder and What-If Simulator
<input type="checkbox"/> -IDV	Disable ID Verification/Authentication ordering.
<input type="checkbox"/> -AVM	Disable AVM ordering.
<input checked="" type="checkbox"/> -TAX	Disable Tax Transcript Verification ordering and viewing.
<input type="checkbox"/> -BIZ	Disable Business Credit report ordering.
<input type="checkbox"/> -LORDER	Disable Credit Report ordering through LOS.
<input checked="" type="checkbox"/> -WORDER	Disable new Credit Report ordering through website. Refresh and Upgrades allowed.
<input type="checkbox"/> -WUPGRADE	Disable upgrading of credit reports through the website.
<input type="checkbox"/> -AUTOSELECT	Disable SmartSelect for credit ordering.