

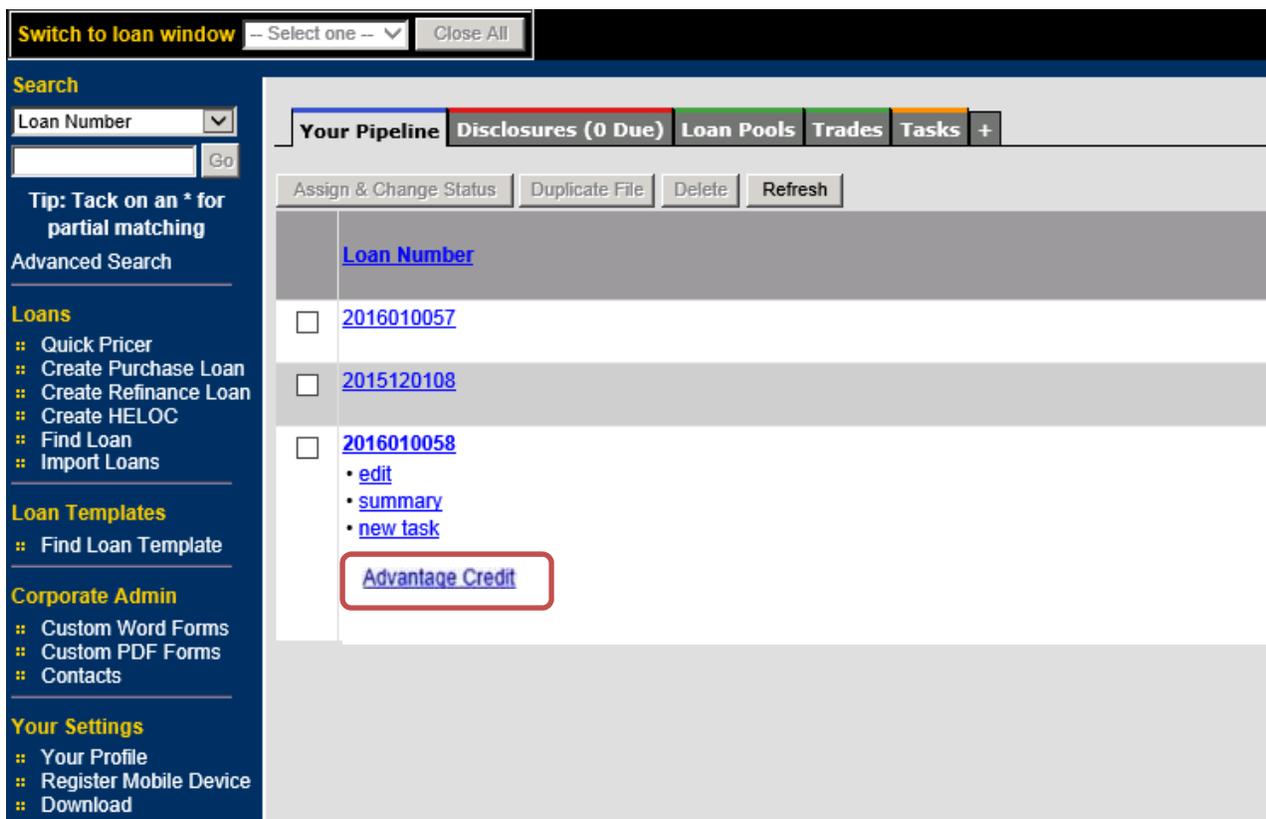
Connecting with Advantage Credit

This document will show you how to connect with Advantage Credit integrated products through Lending QB. Its purpose is not intended to provide detailed instructions on any other process.

Step 1:

Within the selected loan in Lending QB, CLICK the Advantage Credit link (outlined below).

Example



The screenshot shows a web application interface. At the top, there is a navigation bar with a dropdown menu labeled "Switch to loan window" and a "Close All" button. Below this is a search section with a "Loan Number" dropdown and a "Go" button. A tip reads: "Tip: Tack on an * for partial matching". There are sections for "Advanced Search", "Loans" (with links like Quick Pricer, Create Purchase Loan, etc.), "Loan Templates", "Corporate Admin", and "Your Settings". The main content area has tabs for "Your Pipeline", "Disclosures (0 Due)", "Loan Pools", "Trades", and "Tasks". Below the tabs are buttons for "Assign & Change Status", "Duplicate File", "Delete", and "Refresh". A table lists loans with checkboxes and links. The third row, for loan number 2016010058, has links for "edit", "summary", and "new task". A red box highlights the "Advantage Credit" link below these options.

Step 2:

A new window will appear. This window displays the Settlement Services Worksheet as it would through direct access into Advantage Credit website. You can order additional products from this screen as well. ***Note that clients will only have 30 minute access on this screen. Because Lending QB is integrated with Advantage Credit, no additional login step is required.***

Example

ADVANTAGE CREDIT		File # <input type="text"/>																																												
Main » Settlement Services Worksheet (SSW)																																														
SETTLEMENT SERVICES WORKSHEET (SSW)																																														
<input type="button" value="Edit"/>	Printer-friendly version																																													
Worksheet #: 63464 Need to send to a lender?																																														
Loan #:	2016010058	Address: 854 GRINDSTONE DR, ANTHILL, MO 65488																																												
Borrower:	MELINDA TESTCASE	Property:																																												
Co-Borrower:																																														
<div style="display: flex; justify-content: center; gap: 20px;"> Order New Product Import Existing Product </div>																																														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Service</th> <th style="text-align: left;">Date Ordered</th> <th style="text-align: left;">Status</th> <th style="text-align: left;">Price</th> </tr> </thead> <tbody> <tr><td colspan="4">CREDIT REPORT</td></tr> <tr><td colspan="4">UNDISCLOSED DEBT NOTIFICATIONS</td></tr> <tr><td colspan="4">IDENTITY VERIFICATION</td></tr> <tr><td colspan="4">FLOOD REPORT</td></tr> <tr><td colspan="4">AVM REPORT</td></tr> <tr><td colspan="4">TAX RETURN VERIFICATION</td></tr> <tr><td colspan="4">BUSINESS CREDIT REPORT</td></tr> <tr><td colspan="4">VERIFICATION OF EMPLOYMENT</td></tr> <tr><td colspan="4">VERIFICATION OF DEPOSIT</td></tr> <tr> <td colspan="3" style="text-align: right;">TOTAL:</td> <td>\$0.00</td> </tr> </tbody> </table>			Service	Date Ordered	Status	Price	CREDIT REPORT				UNDISCLOSED DEBT NOTIFICATIONS				IDENTITY VERIFICATION				FLOOD REPORT				AVM REPORT				TAX RETURN VERIFICATION				BUSINESS CREDIT REPORT				VERIFICATION OF EMPLOYMENT				VERIFICATION OF DEPOSIT				TOTAL:			\$0.00
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TOTAL:			\$0.00																																											

Contact Advantage Credit: call (303) 670-7993 or fax (303) 670-8067

Step 3:

The Advantage Credit custom file page can be retrieved once a credit report has been ordered.

Example

SETTLEMENT SERVICES WORKSHEET (SSW)

Edit
[Printer-friendly version](#)

Worksheet #: 62897 [Need to send to a lender?](#)

Loan #: 2015120108 **Address:** 123, DUMONT, CO 80436

Borrower: TRACY TEST **Property:** Click to view custom file page

Co-Borrower:

Order New Product
[Import Existing Product](#)
--Select a doc type--
Export to LOS

<input type="checkbox"/> Service	Date Ordered	Status	Price
CREDIT REPORT			
<input type="checkbox"/> view remove 3103010: TRACY TEST	12/29/15 09:40:22 AM	TU/EF	\$2.00
UNDISCLOSED DEBT NOTIFICATIONS			
IDENTITY VERIFICATION			
FLOOD REPORT			
AVM REPORT			
TAX RETURN VERIFICATION			
<input type="checkbox"/> view remove 275462: TRACY TEST	12/24/15 06:26:09 AM	COMPLETED	\$9.75
BUSINESS CREDIT REPORT			
VERIFICATION OF EMPLOYMENT			
VERIFICATION OF DEPOSIT			
			TOTAL: \$11.75

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Custom File Page Example

ADVANTAGE CREDIT File # Go [Main](#) [Ask Advan](#)

[Main](#) | [Credit File](#)

[View Invoice](#) [Close](#)

FILE #: 3103010 **REF #:** 2015120108

APPLICANT: TRACY TEST - *****0010 **XP:** TU: EF:

CO-BOR:

ADDR: 123, DUMONT, CO 80436

PREV:

[Requests History](#)

Type	Processor	Message	Ordered	Resolved	Status
*** NO RECORDS FOUND ***					

[Documents](#)

Description	Date
*** NO RECORDS FOUND ***	

[Upload Borrower Authorization](#)

[Submission Results](#)

Bureau	For	Date	OK	Ordered By	Error Message
EQUIFAX	B	12/29/15 9:40 AM	YES	LARRY TRAN	*** NO RECORD FOUND ***
TRANSUNION	B	12/29/15 9:40 AM	YES	LARRY TRAN	*** NO RECORD FOUND ***
EXPERIAN	B	12/29/15 9:40 AM	NO	LARRY TRAN	UNABLE TO STANDARDIZE CURRENT ADDRESS

?

[Charges](#)

Date	Description	Credit	Charge
12/29/2015	2BUR	\$0.00	\$0.00
12/29/2015	SURCHARGE-CO State Surchg	\$0.00	\$2.00
		Tax	\$0.00
		Total	\$2.00

VIEW REPORT

- [WEB / PDF /](#)
- [Prequal Analyzer](#)

-- Other Reports --

ADD-ON PRODUCTS

- [Credit Analyzer](#)
- [What-If Simulator](#)
- [Comparison Report](#)
- [Request Supplement](#)
- [Request RESCORE EXPRESS](#)
- [Request RMCR](#)
- [Request VOE](#)
- [Add Bureaus / Spouse](#)
- [Undisclosed Debt Notifications](#)

UNMERGE REPORT

BORROWER

CO-BORROWER

EXPERIAN

TRANSUNION

EQUIFAX

[Additional Options](#)

Web PDF

ADDITIONAL PRODUCTS

[Back to Worksheet](#)

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Click to go back to Settlement Service Worksheet

Step 4:

Back at Settlement Service Worksheet, it will allow all products to be imported back into Lending QB.

Example

ADVANTAGE CREDIT | File # [v] | Go | Main | Ask Advantage | Help | Log

main | Settlement Services Worksheet (SSW)

SETTLEMENT SERVICES WORKSHEET (SSW)

Edit | [Printer-friendly version](#)

Worksheet #: 62897 | [Need to send to a lender?](#)

Loan #: 2015120108 | Address: [v]
 Borrower: TRACY TEST | Property: [v]
 Co-Borrower: [v]

Order New Product | [Import Existing Product](#)

<input type="checkbox"/> Service	--Select a doc type-- UNIFORM RESIDENTIAL LOAN APPLICATION ANNUAL INCOME TAX RETURN FILED BPO BANK STATEMENTS MISC ASSETS CREDIT REPORT MERS CONFIRMATION 4506 T BORROWERS CERTIFICATION AND AUTHORIZATION FLOOD HAZARD NOTIFICATION SERVICE DISCLOSURE STATEMENT TIL DRIVE REPORT INITIAL LOAN PACKAGE UPLOAD 4506T REQUEST FOR TRANSCRIPTS ALLONGE AMORTIZATION SCHEDULE COMPLIANCE AGREEMENT HUD SETTLEMENT STATEMENT NAME AFFIDAVIT NOTE NOTICE OF ASSIGNMENT SALE TRANSFER SERVICING W9 REQUEST FOR TAXPAYER IDENTIFICATION WAIVER OF BORROWERS RIGHTS RIDER IDENTIFICATION TAX TRANSCRIPTS W2 TRANSCRIPTS W-2'S BORROWER W-2'S CO-BORROWER
<input type="checkbox"/> CREDIT REPORT	
<input type="checkbox"/> view remove 3103010: TRACY TEST	
UNDISCLOSED DEBT NOTIFICATIONS	
IDENTITY VERIFICATION	
FLOOD REPORT	
AVM REPORT	
TAX RETURN VERIFICATION	
<input type="checkbox"/> view remove 275462: TRACY TEST	
BUSINESS CREDIT REPORT	
VERIFICATION OF EMPLOYMENT	
VERIFICATION OF DEPOSIT	

[Export to LOS](#) 

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END