

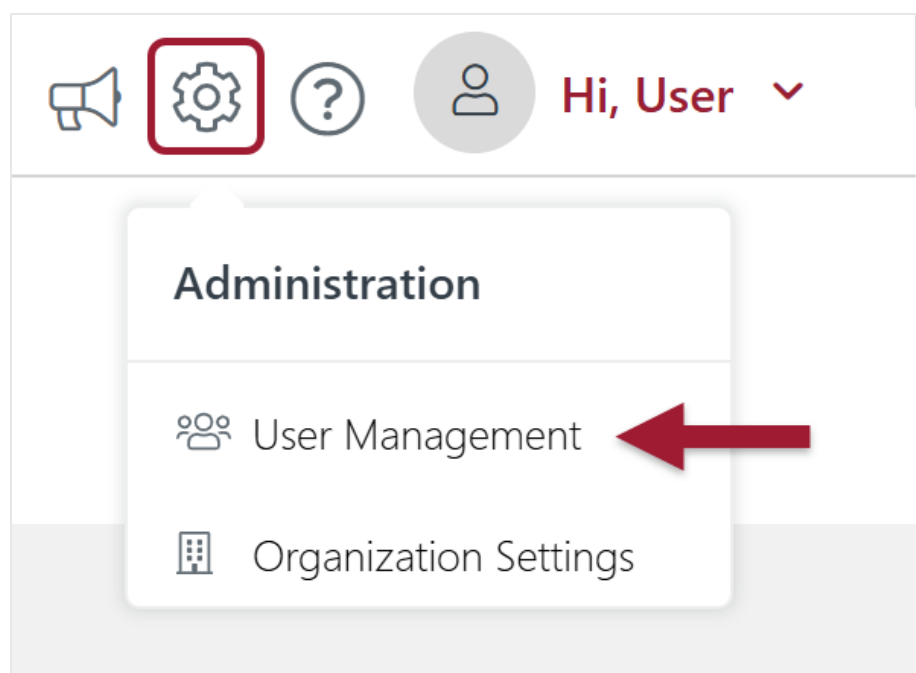
Client Training HQ

Search Other Users' Orders Functionality

As a WebManager, you can give any authorized user (including yourself as a WebManager) in your organization access to search other users' orders using the Administration: User Management section of the Verification Insights Portal™ (VIP).

Enabling This Feature for a User

In the upper right corner of any VIP screen, click the **gear icon** to open the **Administration** dropdown menu, and then click **User Management**.



Images are examples and for information purposes only. They may vary across platforms and are subject to change.

On the **User Management** screen, follow these steps:

1. Click anywhere in the row of a specific user to view or update their **User Details**.

Note: To search for a user, type the user's first name, last name, email, or username in the search bar, or use the **Filters** button to search by User Status or Organization Status, or by Organization or Location.

The screenshot shows the 'User Management' screen in the 'VERIFICATION INSIGHTS PORTAL™'. The left sidebar contains 'New Order' and 'Order History'. The main area has a search bar and a 'Filters' button. Below the search bar is a table with columns: Name, Username, Status, Organization, Location, and Last Login. The table lists 10 users, with 'User Eight' highlighted. A red arrow points to the 'User Eight' row. A red circle with the number '1' and a red box around the right arrow icon are also present.

Name	Username	Status	Organization	Location	Last Login
User Eight	User.Eight	ACTIVE	User Company	Location ABC	01/23/20XX
User Five	User.Five	ACTIVE	User Company	Location ABC	05/17/20XX
User Four	User.Four	ACTIVE	User Company	Location ABC	05/09/20XX
User Nine	User.Nine	ACTIVE	User Company	Location DEF	05/17/20XX
User One	User.One	INACTIVE	User Company	Location ABC	Never
User Seven	User.Seven	ACTIVE	User Company	Location ABC	10/09/20XX
User Six	User.Six	ACTIVE	User Company	Location DEF	12/10/20XX
User Ten	User.Ten	ACTIVE	User Company	Location GHI	05/17/20XX
User Three	User.Three	ACTIVE	User Company	Location ABC	12/10/20XX
User Two	User.Two	ACTIVE	User Company	Location GHI	08/16/20XX

2. The **User Details** screen will appear. Under the **Permissions** tab, in the **User Permissions** window, click the pencil icon.

The screenshot shows the 'User Details' screen in the 'VERIFICATION INSIGHTS PORTAL™'. The left sidebar contains 'New Order' and 'Order History'. The main area has a 'Profile' tab and a 'Permissions' tab. The 'Permissions' tab is selected. Below the tabs is a 'User Permissions' section with a 'User Type' dropdown and a 'Search Other Users' Orders' button. Below that is an 'Organization & Location' section with 'Organization' and 'Location' fields. A red circle with the number '2' and a red box around the pencil icon are present.

User Details

Profile **Permissions**

User Permissions

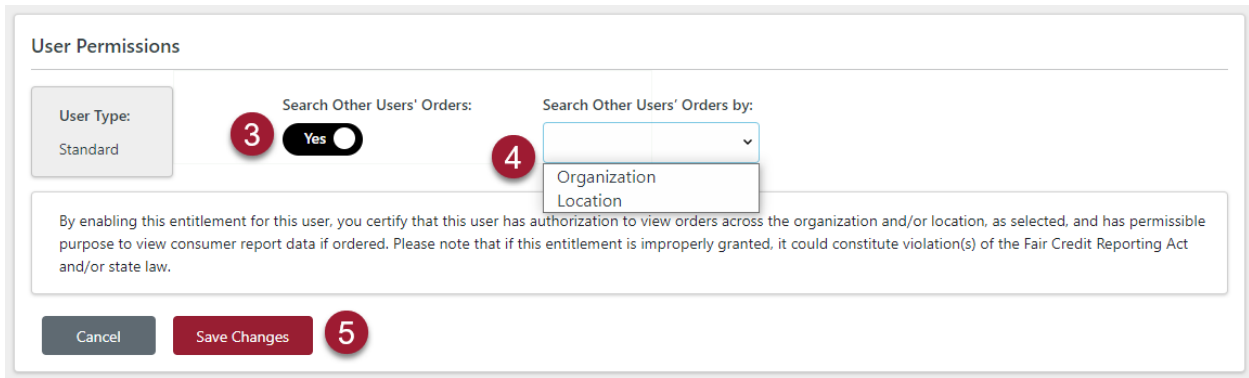
User Type: Standard Search Other Users' Orders: No

Organization & Location

Organization: User Company 00000 Location: Location ABC 11111

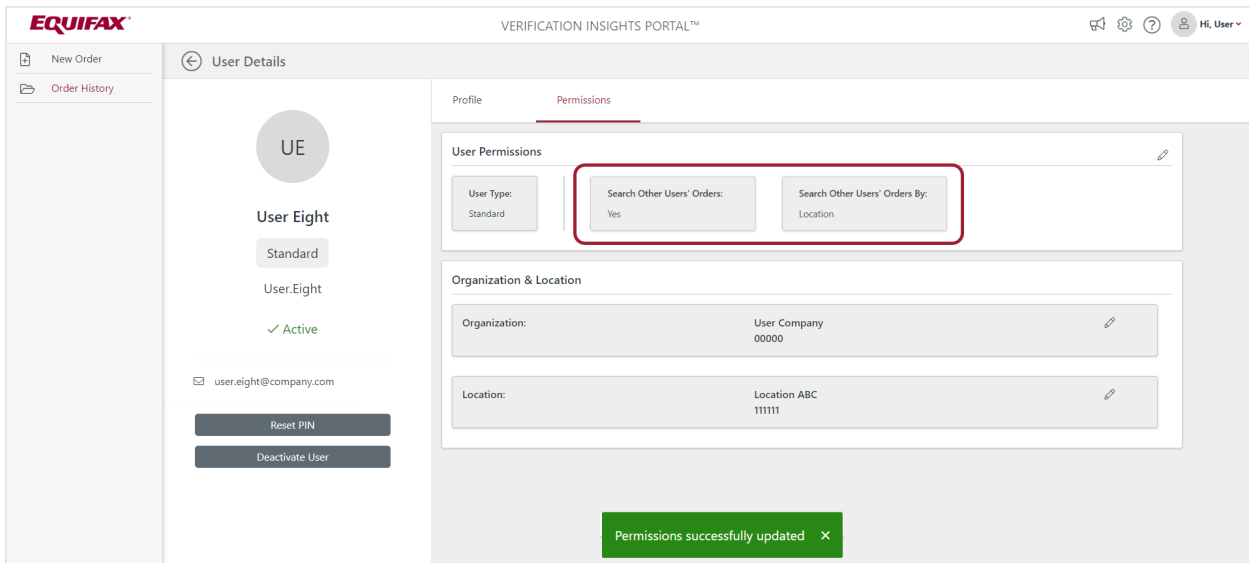
Images are examples and for information purposes only. They may vary across platforms and are subject to change.

3. The **User Permissions** window will now allow you to edit. For Search Other Users' Orders, toggle the button to **Yes**.
4. From the dropdown menu, choose to have the user Search Other Users' Orders by **Organization** or **Location**.
5. Click **Save Changes**.



The image shows a 'User Permissions' window. On the left, there is a 'User Type' dropdown menu with 'Standard' selected. To the right of this is a toggle switch for 'Search Other Users' Orders', which is currently set to 'Yes' (indicated by a red circle with the number 3). Further right is a dropdown menu for 'Search Other Users' Orders by:', which is currently set to 'Organization' (indicated by a red circle with the number 4). Below these controls is a text box with a disclaimer: 'By enabling this entitlement for this user, you certify that this user has authorization to view orders across the organization and/or location, as selected, and has permissible purpose to view consumer report data if ordered. Please note that if this entitlement is improperly granted, it could constitute violation(s) of the Fair Credit Reporting Act and/or state law.' At the bottom of the window are two buttons: 'Cancel' and 'Save Changes' (indicated by a red circle with the number 5).

6. Your changes will be reflected in the User Permissions window for that user.



The image shows the 'User Details' page in the 'VERIFICATION INSIGHTS PORTAL™'. The page is divided into two main sections: 'Profile' and 'Permissions'. The 'Permissions' section is currently active. In the 'Permissions' section, there is a 'User Permissions' box. This box contains a 'User Type' dropdown menu with 'Standard' selected, and two toggle switches: 'Search Other Users' Orders' (set to 'Yes') and 'Search Other Users' Orders By:' (set to 'Location'). These two toggle switches are highlighted with a red rectangle. Below the 'User Permissions' box is the 'Organization & Location' section. This section contains two rows: 'Organization:' with the value 'User Company 00000' and 'Location:' with the value 'Location ABC 11111'. At the bottom of the page, there is a green notification box that says 'Permissions successfully updated'.

Images are examples and for information purposes only. They may vary across platforms and are subject to change.

Using This Feature

To see other users' orders, the enabled user must check the box labeled **Include Others' Orders** on their **Order History** screen (on the **Recent Orders** tab).

The screenshot shows the EQUIFAX Verification Insights Portal. The left sidebar has a red box around the 'Order History' link. The main content area is titled 'Order History' and has a red box around the 'Recent Orders' tab. Below the tabs, there is a checkbox labeled 'Include Others' Orders' which is checked. A red arrow points to this checkbox. Below the checkbox is a table of orders.

Report / Order ID	Inquiry SSN / EID	Name	File / Tracking	Order Date	Status
Solution Title 0123456789012345	XXX-XX-1111	Consumer One	ABC123	08/13/20XX Expires in 7 days	✓ COMPLETED
Solution Title 1234567890123456	XXX-XX-2222	Consumer Two	DEF456	08/13/20XX Expires in 7 days	✓ COMPLETED
Solution Title 2345678901234567	XXX-XX-3333	Consumer Three	GH789	08/13/20XX Expires in 7 days	✓ COMPLETED
Solution Title 3456789012345678	XXX-XX-4444	Consumer Four	JKL321	08/12/20XX Expires in 6 days	✓ COMPLETED
Solution Title 4567890123456789	XXX-XX-5555	Consumer Five	MNP654	08/12/20XX Expires in 6 days	✓ COMPLETED
Solution Title 5678901234567890	XXX-XX-6666	Consumer Six	QRS987	08/12/20XX Expires in 6 days	✓ COMPLETED

Once this permission has been enabled, the user will be able to search for either their own orders or all users' orders in the **Search All Orders** tab of their Order History.

The screenshot shows the EQUIFAX Verification Insights Portal. The left sidebar has a red box around the 'Order History' link. The main content area is titled 'Order History' and has a red box around the 'Search All Orders' tab. Below the tabs, there is a search form. The 'Search In' dropdown menu is open, showing 'My Orders' and 'All Organization Orders'. A red box highlights the dropdown menu.

Search By (optional): Inquiry SSN (dropdown) Enter SSN (text input) Search (button)

Search In (dropdown): My Orders, All Organization Orders

Order Status: All Active Orders (dropdown)

Order Start Date: 08/06/20XX (calendar icon)

Order End Date: 08/13/20XX (calendar icon)

Your orders will appear here.

To begin, please use the search criteria above to search your order(s).

More Training Available!

Check out additional training resources available on our site, [Connections](#).

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.

Images are examples and for information purposes only. They may vary across platforms and are subject to change.