

CR Portal Upgrade v5.0.1 - v5.2.0 Quick Reference Guide

This guide provides an overview of functions in CR Portal version 5.2.0 that look slightly different to the same functions in the previous version of CR Portal (v5.0.1). For full descriptions on how to use CR Portal v5.2.0, refer to the CR Portal User Guide for Standard Operators.

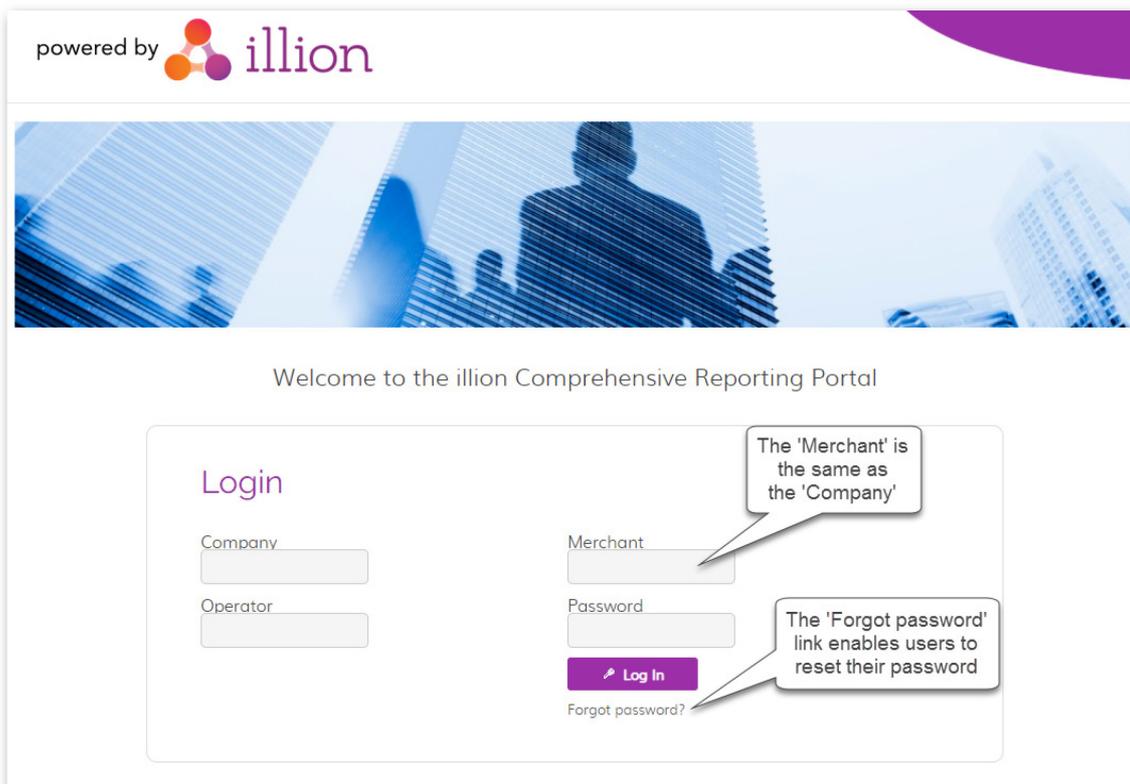
Login Screen

CR Portal v5.2.0 web address for UAT and Production environments:

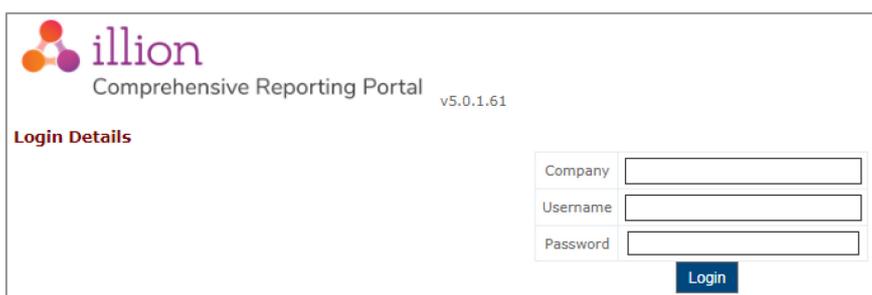
UAT Environment: <https://demo.inteflow.com.au/integate/signin>

Production Environment: <https://crportal.inteflow.com.au/integate/signin>

Login credentials remain the same as used in the previous CR Portal version (v5.0.1) for both production and UAT environments. The new login screen has an additional field - the Merchant field requires the same value as the Company field:



The above login screen replaces the old login screen below. Your login credentials have not changed.





Add your Company ID to the CR Portal URL

To prevent the need to enter the Company and Merchant details with every login, this information can be saved into the URL:

1. Type the required URL into your browser:

Demo URL: demo.inteflow.com.au/Integate/SignIn?company=ILLION&merchant=ILLION

Production URL: crportal.inteflow.com.au/Integate/SignIn?company=ILLION&merchant=ILLION

2. Replace the word 'ILLION' with the Company ID from your login credentials as displayed below:

Replace the highlighted text with the 'Company' from your login credentials

Demo URL: demo.inteflow.com.au/Integate/SignIn?company=ILLION&merchant=ILLION

Production URL: crportal.inteflow.com.au/Integate/SignIn?company=ILLION&merchant=ILLION

A URL with the Company details included will display the login page with only the Operator and Password fields displayed:

powered by  **illion**
Formerly Dun & Bradstreet

Welcome to your automated credit decisioning platform

Login

Operator

Password

[Log In](#)

3. Bookmark the login page for future use.



New Dashboard

The 'main screen' is now replaced with the Dashboard that contains 3 widgets. Detailed user instructions can be found in the CR Portal User Guide.

The dashboard features a purple sidebar with a home icon and a main content area. At the top right, it shows the user 'crpadmin' and 'Genesis' with a settings menu and a log out icon. The dashboard title is 'Dashboard' with buttons for '+ Add New Widget' and 'Copy Dashboard'.

Account Search Widget: A search form with fields for Account Number, Account Sub Id, First Name, Last Name, and Customer Id. It includes a 'Reset Search' button and a search icon. A callout says: 'Click to return to Dashboard. Available from all screens.'

Batches Widget: A table titled 'Comprehensive Reporting Batches' with columns: Batch No, Received Date, Accounts, Internal Errors, Bureau Errors, Status, and Bureaus. It contains 5 rows of data.

Reports Widget: A section titled 'Comprehensive Reporting Reports' with sub-section 'Error Reports' and buttons for 'Error Summary Pivot Table', 'All Bureau Messages (Errors, Warnings, Information messages)', 'All Failed Closed/Ceased Accounts', and 'All Failed Accounts'.

The new Dashboard replaces the old 'main screen':

The old 'main screen' is titled 'Comprehensive Reporting Portal v5.0.1.61'. It features the illion logo and navigation links for 'Company-Portfolio: DEMO User: Demo | Log Out', 'User Manual | Configuration', and 'v5.0.1.61'.

Account Search: A form with fields for Customer Number, Account Number, Account Sub ID, Customer Name (First Name, Last Name), and an 'Add Account' button.

Batches: A table with columns: Company-Portfolio, Batch, Portal Receive Date, Accounts, Internal Errors, Bureau Errors, and Status. It lists several batches with their respective error counts and statuses.

Reporting: A section with sub-sections 'Error Reports', 'Management Reports', and 'Audit Reports', each containing specific report links.



Dashboard - Account Search Widget

Comprehensive Reporting Account Search

Account Number Account Sub Id Reset Search **Start Search**

First Name Last Name

Customer Id

Please enter a search criteria to retrieve accounts.

+ Add Account

Account Search fields

'Start Search' button.

The Account Search Widget replaces the old Account Search function:

Account Search

Customer Number Customer Number

Account Number Account Number Account Sub ID

Customer Name First Name Last Name

Search **Add Account**

Dashboard - Batches Widget

Navigating to screens from the Batch widget.

Comprehensive Reporting Batches

Batch No	Received Date	Accounts	Internal Errors	Bureau Errors	Status	Bureaus
7	27/03/2019 05:17 PM	47	5	1	Request Sent	
6	27/03/2019 04:22 PM	47	5	0	Loaded in Portal	
5	26/02/2019 02:19 PM			0		
4	12/02/2019 10:52 AM	44	5	1	Response Received	
4-1		1		0	Sent	
3				0	Loaded in Portal	

Click on the batch number to display the corresponding Batch screen

Click Internal Errors 'number' to display details in Internal Errors screen

Click Accounts 'number' to display Batch screen

Click Bureau Errors 'number' to display details in Bureau Errors screen

Click on the sub-batch number to display the sub-batch in the Batch screen.

Next Page ▶

The Batches widget replaces the old 'main screen' batch navigation:

Batches

Company-Portfolio	Batch	Portal Receive Date	Accounts	Internal Errors	Bureau Errors	Status
DEMO	4	2017-10-12 15:08	8	1	2	Response Received
	4-1		1		1	Response Received
	4-2		1		0	Awaiting Submission
DEMO	3	2017-10-12 14:54	8	0	0	Response Received
DEMO	2	2017-10-12 14:29	7	0	0	Response Received



Batch Screen

The content of the Batch screen is now split into tabs.

powered by illion

Batch 2

Screen split into tabs

Manual bureau submission provided in 'Generate Request' tab

Bureau response details provided in 'Response Details' tab

Batch Details | Generate Request | Response Details | Reporting

This screen allows a user to select individual accounts within a batch and see when the batch was processed. A Batch can be generated and sent to the bureau using the Generate Batch Request button.

Extract Date Time: 10/01/2018 1:44:07 PM
 Portal Receive Date: 20/03/2018 11:13:24 AM
 Filename: 34407.csv

Accounts in Batch

List of accounts in batch displayed upon opening Batch screen

Click on account line item to view account details

Record	Account Number	Account Sub-ID
4	900049437	8000000257
6	190001845	8000000513
7	990050100	8000000455
8	770000805	8000000361

The new Batch screen replaces the old Batch screen:

Batch 4

Extract Date Time: 12/10/2017 3:08:42 PM
 Portal Receive Date: 12/10/2017 3:08:42 PM

Bureau Response Statistics

Statistic	DNB	Experian
Date Request Sent	12/10/2017 3:22:20 PM	12/10/2017 3:22:20 PM
Date Response Received	12/10/2017 3:27:43 PM	12/10/2017 3:23:07 PM
Records Received	9	8
Records Success	7	4
Corrections Received	1	0
Records Rejected	2	4
Accounts Opened	0	0
Accounts Closed	0	0
AccountID Changed	0	0
Consumer Credit Liability Information Updated	0	0
Consumer Credit Liability Information Corrected	0	0
Repayment History Added	6	4
Repayment History Corrected	0	0
Defaults Added	0	0
Defaults Updated	0	0
Defaults Corrected	0	0
Accounts Reopened	0	0
Accounts Transferred	0	0
Account Holders Added	0	0
Account Holders Updated	3	4
Account Holders Corrected	0	0
Account Holders Ceased	0	0

Accounts

Record	Account Number	Account Sub ID.
1	21101094	21101094



Account Details Screen

The content of the Account Details screen is now split into tabs.

Account Details

Batch number for account CR data displayed on screen

Account Batch navigation

Previous Batch | **Batch 2** | Next Batch (n/a)

Screen split into tabs

Account Info | Payments & Defaults | Customers

This screen shows the Account Details reported by the Credit Provider for the Credit Facility held by one or more customers.

Account Header

This account will be sent to the bureau **Ignore**

Portal Record Number: 40

Account Number *: 740000363

Account Number Sub Id *: 8000008477

Previous Account Number: []

Previous Account Number Sub Id: []

Credit Purpose *: Consumer (R)

Account Type *: Utilities (UA)

Account Details

Date Opened *: 1/12/2007 (Pencil icon) (R)

Payment Type: Other (X)

Credit Type: Not Selected | Fixed | **Revolving** | Unspecified (R)

Secured *: Secured | **Unsecured** (U)

Loan Term *: XXX

Scroll down to view additional fields

Icon indicates 'correctable only' field. For indication only.

The new Account Details screen replaces the old Account Details screen:

Account Details

Account Header	
	This account will be sent to the bureau Ignore
Portal Record Number	3
Account Number*	21101198
Account Number Sub ID*	21101198
Previous Account Number	[]
Previous Account Number Sub ID	[]
Credit Purpose*	Consumer
Account Type*	Personal Loan (Fixed Term)
Account Details	
Date Opened*	2017-02-01
Date Closed	yyyy-mm-dd
Loan Payment Method*	Principal and Interest Paid in Full
Term Type*	Fixed



Account Details - Customers Tab

Account Info | Payments & Defaults | **Customers**

Customers

The Detailed information relating to each of the Customers associated with an account are contained within this tab.

Customer details collapsed by default

Click on down arrow to expand details for individual customer

Expand Collapse

Customer(s) on account

Click here to expand / display all customers' details

The Account Customers tab replaces the old Customer section from Account Details page:

Customers Add New

Anthony Tran

Customers Tab - Customer Address

The customer address(s) are now displayed in their own section of the Customers Tab:

Customers

The Detailed information relating to each of the Customers associated with an account are contained within this tab.

Expand Collapse

Sarah Smith - 62314142

Customer Info

Other Name Details

Address Details

Each customer on the account contains 3 sections

The Address Details section will now display all addresses - there is no need to select an address type to view that address as per the old screen:

Addresses Add New

128 Bqihbiqhp Gybhhy, BQIHBIQHP, KGP, 2066, AU

Address Type* Current / Last Known

Property

Unit

Street No

Street Name

Street Type

Suburb*



The way the Address Details section works has changed. If the address type exists - it will be displayed in the Address Details section. The 'Address Type' no longer acts as a toggle, but as an indicator of the type of address:

The screenshot shows the 'Address Details' section with three address records. Each record has an 'Address Type' field with three options: 'Current/Last Known', 'Previous', and 'Mailing'. The first record has 'Current/Last Known' selected and a circled 'C' icon. The second record has 'Previous' selected and a circled 'P' icon. The third record has 'Mailing' selected and a circled 'M' icon. The 'Address Format' field has 'Formatted' and 'Unformatted' options. The 'Unformatted Address' field contains the address text. The 'DPID' field is empty. The third record has additional fields: 'Property', 'Unit', 'Street No', 'Street Name', 'Street Type', 'Suburb', 'Town *', 'Postcode', 'Country', and 'DPID'. Callouts explain that the Address Type section does not act as a toggle, that the selected type identifies the type of address record, and that the selected type relates to each address only, changing it will edit the record. Specific callouts also identify the second address as the customer's previous address and the third as the customer's mailing address. A note on the left states that if a previous and/or mailing address exist, it will be displayed in the Address Details section.

If the address type does not exist - it will not be displayed. The 'Add New Address' button located at the bottom of the Address Details section is used to add new address types:

The screenshot shows the 'Address Details' section with the 'Address Type' field set to 'Current/Last Known' (C). The 'Address Format' is 'Formatted'. The 'Property' field is empty. The 'Unit' field is empty. The 'Street No' field contains '15'. The 'Street Name' field contains 'Smith'. The 'Street Type' field contains 'Street'. The 'Suburb' field contains 'Kohimarama'. The 'Town *' field contains 'Wellington'. The 'Postcode' field contains 'Postcode'. The 'Country' field contains 'Country'. The 'DPID' field contains 'DPID'. The '+ Add New Address' button at the bottom is circled in red.



Bureau Errors & Warnings/Info Messages Summary

The content of the Bureau Errors Summary screen is now split into tabs:

Bureau Errors are displayed by default when accessing the Error Summary screen

Click on the 'Warnings and Information' tab to view all Bureau warnings & information messages returned for this batch.

Batch 2

Errors | Warnings and Information | Reporting

Bureau Errors Summary

A summary of all bureau Error messages is displayed to allow the user to identify issues and investigate accounts that are failing at one or more of the Credit Bureaus.

Bureau	Code	Input Path	Error	Count
Centrix	ERR4083	Customer/CustomerDetail/PrimaryName/CustomerName/First	First Name Invalid and customer does not exist on Bureau.	6176
illion	Xsd	Customer/CustomerDetail/PrimaryName/CustomerName/First	Field length/format is invalid	6005
Centrix	xsd	Customer/CustomerDetail/PrimaryName/CustomerName/First	The 'First' element is invalid - The value 'i' is invalid according to its datatype 'Token' - The	818
Centrix	xsd	Customer/CustomerDetail/PrimaryName/CustomerName/First	The 'First' element is invalid - The value 'a' is invalid	734

Warnings and Information Tab

The 'Warnings and Information' tab contains all bureau warnings *and* information messages returned for the batch:

Errors | **Warnings and Information** | Reporting

Bureau Warnings and Information Summary

A summary of all bureau Warning and Information messages is displayed to allow the user to identify issues and investigate accounts that have successfully loaded but triggered a message from one or more of the Credit Bureaus.

Bureau	Code	Input Path	Error	Count
Centrix	ERR3024	AccountDetail/AccountName	Invalid Account Name. Field will be ignored.	577
illion	ERR3024	AccountDetail/AccountName	Invalid Account Name. Field will be ignored.	577
Centrix	ERR4049	Customer/CustomerDetail/PrimaryName	Primary Name different on Bureau for this Customer ID.	549
illion	ERR4049	Customer/CustomerDetail/PrimaryName/CustomerName	Primary Name different on Bureau for this Customer	546

The Bureau Errors & Warnings tabs replaces the old Bureau Errors Summary screen:

Batch 4

Bureau Errors Summary

Bureau	Code	Input Path	Error Type	Error	Count
DNB	4149	AccountHolders/AccountHolder/PrimaryName/Formatted	E	Primary name cannot be loaded	1
Experian	H1NF101	AccountHolders/AccountHolder/PrimaryName/Formatted/Family	E	Holder 1: primary family name required	1
DNB	4126	RepaymentHistory	I/W	Payment Period x-check - Missing Payment Period 2017-07	1

To view Bureau Errors, Warnings, and Info Messages in a single list, run one of the following reports:

- All Bureau Messages report via the Reporting tab in the Batch screen (detailed list)
- Error Summary Pivot Table report via the Reports widget on the Dashboard (summarised list)