

# WebCMS

## New Products & Services

Wednesday, April 24, 2024  
2:00 pm EST

Steve Hollis  
Gina Calabrese Sylvester, CMP, CGA



[www.support@nacmtampa.com](mailto:www.support@nacmtampa.com)

# Agenda

- 01 Meeting Reservation Setup & Online Form
- 02 Credit Report History
- 03 Experian Global Report
- 04 LexisNexis® Bridger Insight® XG
- 05 Portfolio Risk Analysis Form & 2024 Pricing
- 06 Q & A

# Groups

Bureau side/meetings/reservations

## Meeting Reservation Setup

Group Name: 142 - National Fence Products Credit Group - May 2024 Meeting

Meeting Type: Credit Report Book

Meeting Date: 5/16/2024

#	Type	Title	Options
1 ✗	checkbox ▾	Please check the functions you will be attending on Thursday, May 16th	2:00 - 2:45 pm Advisory Committee Meeting 3:00 - 5:00 pm Education & General Business & Account Discussion
2 ✗	checkbox ▾	Please check if you will be attending the function on Friday, May 17th	7:30 - 8:30 am Breakfast 8:00 am - 12:00 pm Continued Account Discussion & Roundtable Discussion
3 ✗	text ▾	Thursday Dinner Guests	If you are bringing a guest to dinner please input their name below:
4 ✗	text ▾	Food Allergy Information	Please list any food allergies
5 ✗	text ▾	Emergency Contact Information	First & Last Name Mobile Number

UPDATE CANCEL

Preview

View / Edit Member: < - SELECT -->

☐ Unable to Attend

☐ Attend via phone

# Attend/Participating: Attendee Names:

Please check the functions you will be attending on Thursday, May 16th

# Groups

memberside/groups

## Meeting Reservation Form

### Reservations

MAY  
Thu  
16

MAY 2024 MEETING  
CREDIT REPORT BOOK  
5/16/2024 • 3:00 PM

Grand Hyatt Denver  
1750 Welton St.  
Denver, CO 80202  
81.0000.000.0000

You may still make changes to your reservations until Apr 24, 2024.

#### Will you be attending?

☒ Yes  
☐ No

#### Who will be attending?

Attendees

Molly Rush × Gina Calabrese Sylvester × Name...

Press the **ENTER** key after entering each attendee's name.

Molly Rush ⋮ Gina Calabrese Sylvester ⋮ 

Attachment

#### Please check the functions you will be attending on Thursday, May 16th

☒ 2:00 - 2:45 pm Advisory Committee Meeting ☒ 3:00 - 5:00 pm Education & General Business & Account Discussion ☒ 6:00 pm Networking Dinner

#### Please check if you will be attending the function on Friday, May 17th

☒ 7:30 - 8:30 am Breakfast ☒ 8:00 am - 12:00 pm Continued Account Discussion & Roundtable Discussion

#### Thursday Dinner Guests


If you are bringing a guest to dinner please input their name below:

Save Reservation




# Credit Report History

memberside/credit-reporting



INDUSTRY  
ANALYSIS REPORT



## Member Lookup

Searches company name and contact name.

## Alerts

## Reports

Credit Report History

Recently Viewed Reports Credit Reports

# Credit Report History

memberside/credit-reporting

- Defaults to the last 30 days
- Filters can change the date range, report type, user and subject name/address
- Reports included:
  - NTCR
  - Insight Report
  - Equifax Report (BCIR Plus 2.0)
  - Experian Premier
  - Equifax Canada
  - Experian Global (*coming soon*)
  - LexisNexis Bridger Insight (*coming soon*)
- **NOT** included:
  - Consumer Credit Reports

The screenshot shows the 'Credit Report History' interface. A red circle highlights the 'Clear Filters' button. A red arrow points to the 'Type' dropdown menu, which is open and shows options: NTCR, Insight Report, Equifax Report, Experian Premier, Equifax Canada, Experian Global, and LexisNexis® Bridger Insight®. Another red arrow points to the 'View' button for the first report entry, which has a green checkmark icon next to it. The table below shows report details:

Date	Type	User	Subject Name/Address	Status	Actions
03/19/2024	NTCR	User	Subject Name/Address		
Mar 25, 2024	Insight Report			✓	View
Mar 25, 2024	Equifax Report				
Mar 25, 2024	Experian Premier				
Mar 25, 2024	Equifax Canada				
Mar 25, 2024	Experian Global				
Mar 25, 2024	LexisNexis® Bridger Insight®				

# Credit Reporting

memberside/credit-reporting

## Experian Global Report



EXPERIAN GLOBAL  
CREDIT REPORT

### International credit report can include:

- Risk Dashboard
- Business Facts
- Credit Risk Ratings
- Negative Facts
- Management Information
- Finances
- Property
- Additional Country Specific Business Identification

Home > Reports > Report #866

New Report

### Global Report - ALFA LAVAL AALBORG PTE. LTD.

<b>Business Name :</b> ALFA LAVAL AALBORG PTE. LTD.		<b>Global Business Identification Number :</b> 004072081	
<b>Primary Address:</b>	11 JOO KOON CIRCLE SINGAPORE, 629043 SGP	<b>Website:</b>	www.aalborg-industries.com
		<b>Telephone:</b>	+65 62619898
		<b>Fax:</b>	+65 62661111

TOP

### Risk Dashboard

Risk Rating and Credit Limit Recommendation	Payment Behavior	Negative Facts
<p>Risk Rating</p> <p>64 LOW-MEDIUM RISK</p> <p>Credit Limit Recommendation: SGD 973,000</p>	<p>Payment Rating</p> <p>No Payment Experience</p> <p>No payment experience</p>	<p>2</p>

TOP

### Business Facts

TRANSPORT/STORAGE			
<b>Business Type:</b>	LTD - Private Limited Company - LIMITED LIABILITY COMPANY / PRIVATE LIMITED COMPANY	<b>Nace Code:</b>	Manufacture of central heating radiators and boilers - 2521 Building of ships and floating structures - 3011
<b>Registration Date:</b>	06/26/1978	<b>Subscribed Capital:</b>	SGD 500,000 (06/26/1978)

# Credit Reporting

[memberside/credit-reporting](#)

# Experian Global Report

Experian Global Report draws on a comprehensive repository of business and identity data updated monthly by Experian commercial bureaus and partners across the globe.

This site is currently supported for *Chrome, FireFox, Safari, and Microsoft Edge*. Use of a browser that is unsupported or older versions of Internet Explorer may result in login, alignment or navigational problems.

Business Name

ALFA LAVAL AALBORG

Address Line 1

Enter a location

Address Line 2

State

Zip Code

City

Country

Italy

Reset

Search

34 countries available

Zone	Code	Country
A	DK	Denmark
A	GB	Great Britain
A	IE	Ireland
A	NO	Norway

Zone	Code	Country
B	AT	Austria
B	BE	Belgium
B	CA	Canada
B	DE	Germany
B	ES	Spain
B	FI	Finland
B	FR	France
B	IT	Italy
B	NL	Netherlands
B	SW	Sweden

Zone	Code	Country
C	BG	Bulgaria
C	BR	Brazil
C	CH	Switzerland
C	CZ	Czech Rep.
C	HR	Croatia
C	HU	Hungary
C	LI	Liechtenstein
C	LT	Lithuania
C	LU	Luxembourg
C	LV	Latvia
C	MD	Moldavia
C	PL	Poland
C	PT	Portugal
C	RO	Romania
C	RS	Republic of Serbia
C	SG	Singapore
C	SI	Slovenia
C	SK	Slovak Republic
C	TR	Turkey
C	UA	Ukraine

- Expected launch date: mid-May
- Pricing is by Zone



# Credit Reporting

memberside/credit-reporting

## LexisNexis® Bridger Insight® XG



### Global list screening report includes:

- Bureau of Industry and Security (BIS)
- Excluded Parties List System (EPL)
- European Union (EU)
- Financial Action Task Force (FATF)
- Her Majesty's Treasury Sanctions (HM)
- The Office of Foreign Assets Control (OFAC)
- Office of Inspector General (OIG)
- Office of the Superintendent of Financial Institutions (OSFI)
- Primary Money Laundering Concern (PMLC)
- Unauthorized Banks
- United Nations Sanctions (UN)

Watchlist matches provided by LexisNexis® Bridger Insight® XG.

This site is currently supported for *Chrome, FireFox, Safari, and Microsoft Edge*. Use of a browser that is unsupported or older versions of Internet Explorer may result in login, alignment or navigational problems.

Business/Individual Name  
HOLLIS

Address Line 1  
Enter a location

Zip Code

Address Line 2

City

State  
Florida

Country  
United States


Reset Submit

# Credit Reporting

memberside/credit-reporting

## LexisNexis® Bridger Insight® XG

- List of similars included in the report
- Information on the match presented in a numbered list
- No matches returns a report with that information
- Expected launch date: Mid-May



LEXISNEXIS  
BRIDGER INSIGHT

New Report

LexisNexis® RISK SOLUTIONS Bridger Insight® XG

REPORT DATE: Monday, March 25, 2024 3:33 PM

List Screening (3 matches found)

No.	Score	Name	Date of Birth	Gender	ID Numbers	Address
1	97	JACKSON MED CENTER PHARMACY				779 WEST FORE
2	90	JACKSON DURABLE MEDICAL EQUIPMENT, L.L.C.			NAMQU219K3Z7 (Other)	5510 S JACKSON USA
3	87	JACKSON DURABLE MEDICAL EQUIPM			166P587515 (Other)	5510 S JACKSON

#1 JACKSON MED CENTER PHARMACY

Profile Data

	Input Data	Profile Data
Entity Type	Unknown	Business
Name	JACKSON	JACKSON MED CENTER PHARMACY (Business)
Occupation		PHARMACY
Incident		1128b5

Screening List

Screening List Name	OIG EXCLUSIONS.BDF
File Build	03/11/2024
Entity Created	10/11/1990
Entity Last Updated	03/08/2024

Comments

There were no watchlist matches for your search criteria.

DISTRIBUTED BY NACM Tampa, Inc. 5521 W Cypress St Tampa FL 33607

New Report


LexisNexis® RISK SOLUTIONS Bridger Insight®

List Screening (no matches found)

No.	Score	Name	Date of Birth
		HOLLIS	

There were no watchlist matches for your search criteria.

# Portfolio Risk Analysis



**NACM**  
National Association of Credit Management

**TAMPA**

**PORTFOLIO RISK ANALYSIS**

SUBSCRIPTION PLAN OPTIONS & ORDER FORM

LEVEL **1**

Basic information on health of account.  
Includes risk class, dollars outstanding  
and number of members reporting

Automated Delivery			
Number of Customers	Month to Month		Annual Prepay
	Per Month	Yearly Cost	15% Discount
Up to 999	<input type="radio"/> \$100	<input type="radio"/> \$1,200	<input type="radio"/> \$1,020
1000 to 4999	<input type="radio"/> \$150	<input type="radio"/> \$1,800	<input type="radio"/> \$1,530
5000 to 9999	<input type="radio"/> \$200	<input type="radio"/> \$2,400	<input type="radio"/> \$2,040
10,000 to 24,999	<input type="radio"/> \$250	<input type="radio"/> \$3,000	<input type="radio"/> \$3,550
25,000 to 49,000	<input type="radio"/> \$400	<input type="radio"/> \$4,800	<input type="radio"/> \$4,080
50,000+	<input type="radio"/> \$600	<input type="radio"/> \$7,200	<input type="radio"/> \$6,120

LEVEL **2**

Includes Level 1 data **plus** total dollars outstanding on NTCR, number and amount of alerts and collection claims

Automated Delivery			
Number of Customers	Month to Month		Annual Prepay
	Per Month	Yearly Cost	15% Discount
Up to 999	<input type="radio"/> \$150	<input type="radio"/> \$1,800	<input type="radio"/> \$1,530
1000 to 4999	<input type="radio"/> \$250	<input type="radio"/> \$3,000	<input type="radio"/> \$2,550
5000 to 9999	<input type="radio"/> \$350	<input type="radio"/> \$4,200	<input type="radio"/> \$3,570
10,000 to 24,999	<input type="radio"/> \$450	<input type="radio"/> \$5,400	<input type="radio"/> \$4,590
25,000 to 49,000	<input type="radio"/> \$1,100	<input type="radio"/> \$13,200	<input type="radio"/> \$11,220
50,000+	<input type="radio"/> \$2,200	<input type="radio"/> \$26,400	<input type="radio"/> \$22,440

LEVEL **3**

Includes Levels 1 & 2 elements, **plus** summary industry group stats and calculations

Automated Delivery			
Number of Customers	Month to Month		Annual Prepay
	Per Month	Yearly Cost	15% Discount
Up to 999	<input type="radio"/> \$200	<input type="radio"/> \$2,400	<input type="radio"/> \$2,040
1000 to 4999	<input type="radio"/> \$300	<input type="radio"/> \$3,600	<input type="radio"/> \$3,060
5000 to 9999	<input type="radio"/> \$550	<input type="radio"/> \$6,600	<input type="radio"/> \$5,610
10,000 to 24,999	<input type="radio"/> \$1,100	<input type="radio"/> \$13,200	<input type="radio"/> \$11,220
25,000 to 49,000	<input type="radio"/> \$1,600	<input type="radio"/> \$19,200	<input type="radio"/> \$16,320
50,000+	<input type="radio"/> \$3,200	<input type="radio"/> \$38,400	<input type="radio"/> \$32,640

NACM Member ID

Company Name

Member Email #1

Member Email #2

Member Email #3

NACM Rep #1

NACM Rep #2

Monthly Process Day

Existing Data Contributor

Yes ☐ No ☐

NACM Affiliate

Estimated Number of Active Accounts

Expected Load Date

Subscription Start Date

Contract Signor Name

Contract Signor Signature

- Rates listed are introductory and valid through 2024
- Annual pre-pay delivers data monthly but for a discounted set annual cost
- Subscription automatically renews each year until Member cancels, in writing

Indicate your pricing option by selecting the appropriate range of Number of Customers and information Level desired. Only one selection permitted.

## PORTFOLIO RISK LEVEL ANALYSIS AND DESCRIPTIONS

Date of Export	Date data exported from database
Date of Score Refresh	Date the business record score was generated
Date of Trade	Report date of the trade from contributor
Account Number	Contributor AR# reported in manual or electronically loaded data
Account Name	Company name on the business report
City	City on the business report
State	State on the business report
Zip	Zip code on the business report
Country	Country on the business report
Exposure	Member's balance on the business report
NACM ID	Unique business identifier in the database
Trade Line Count	Number of tradelines on the business report
Risk Class	Credit class for the business report
Risk Class Description	Credit class description for the business report
Risk Score	Credit score for the business report
Member DBT	Member calculated DBT on business
Total Balance Reported	Balance of all recently reported trade on the report
Alert Count	Number of alerts reported on the report
Alert Amount	Total dollar amount (if reported) of alerts on the report
Collection Claims	Number of collection claims reported on the report
Claim Amount	Total dollar amount of collection claims on the report
# Members Reporting	Number of group members with trade on the report
Group Total Balance	Total balance of group members with trade on the report
Group % Current	Percent current of group members with trade on the report
Group DBT Weighted	Weighted DBT of group members with trade on the report
Group DBT Average	Average DBT of group members with trade on the report
Score Factor 1	First scoring factor for the credit score
Score Factor 2	Second scoring factor for the credit score (if available)
Score Factor 3	Third scoring factor for the credit score (if available)
Score Factor 4	Fourth scoring factor for the credit score (if available)
Score Factor 5	Fifth scoring factor for the credit score (if available)
NTCR Lien	Does the business have a Lien reported
NTCR Judgment	Does the business have a judgement on file
NTCR UCC	Does the business have UCC information on file
NTCR Mechanic Lien	Does the business have a Mechanics Lien on file
NTCR Corporate	Does the business have corporate information on file
DBT Weighted	Weighted DBT of all recently reported trade on the report
DBT Average	Average DBT of all recently reported trade on the report
Total Dollars Current	Current balance of all recently reported trade on the report
Total Dollars 1-30	1-30 days balance of all recently reported trade on the report
Total Dollars 31 to 60	31-60 days balance of all recently reported trade on the report
Total Dollars 61 to 90	61-90 days balance of all recently reported trade on the report
Total Dollars 91+	91+ days balance of all recently reported trade on the report
Percent Dollars Current	Percent of all recently reported trade that is current
Percent Dollars 1 to 30	Percent of all recently reported trade that is 1-30 days
Percent Dollars 31 to 60	Percent of all recently reported trade that is 31-60 days
Percent Dollars 61 to 90	Percent of all recently reported trade that is 61-90 days
Percent Dollars 91+	Percent of all recently reported trade that is 91+ days
Total Dollars Past Due (31+ days)	Past due balance of all recently reported trade on the report
Total Percent Past Due (31+ Days)	Percent of all recently reported trade that is past due
NTCR in file Date	Date the report was added to the database
Oldest Trade Open Date	Oldest reported credit tenure
% of Trades Open Date Over 1 year	Percentage of trade that have been open for over 1 year
% of Trades Open Date Less than 1 year	Percentage of trade that have been open for less than 1 year
% of Trades Open Date Over 5 years	Percentage of trade that have been open for over 5 years
Highest Individual Credit	Highest reported credit limit
Highest Open Trade	Largest total balance due to one source
Member Total Dollars Current	Balance of member's current trade on the report
Member Total Dollars 1 to 30	1-30 days of member's current trade on the report
Member Total Dollars 31 to 60	31-60 days of member's current trade on the report
Member Total Dollars 61 to 90	61-90 days of member's current trade on the report
Member Total Dollars 91+	91+ days of member's current trade on the report
Member Percent Dollars Current	Percentage of member's reported balance that is current
Member Percent Dollars 1 to 30	Percentage of member's reported balance that is 1-30 days past due
Member Percent Dollars 31 to 60	Percentage of member's reported balance that is 31-60 days past due
Member Percent Dollars 61 to 90	Percentage of member's reported balance that is 61-90 days past due
Member Percent Dollars 91+	Percentage of member's reported balance that is 91+ days past due
Member Total Dollars Past Due (31+ days)	Past due balance of member's current trade on the report
Member Total Percent Past Due (31+ days)	Member calculated percentage of trade past due

### LEVEL 3

## LEVEL 2

## LEVEL 1

- Member Data
- NACM data
- Group Data
- Additional Fields



**bureau side/business subjects/financial/legal tab**

Added listing of Secretary of States for easy access. Click the SEARCH link to be re-directed to the SOS website. From the site, you will want to perform a search for the information and manually enter it in WebCMS.

PULL CREDIT REPORT

**Predictive Score:**

**Score: 999**
**Class: n/a**
**No Score**

NOTIFY OF REVISION

STEVE TEST

123 SAMPLE RD  
TAMPA, FL 33607 US

Contact:  
(NO PRIMARY CONTACT ON FILE)

VIEW REVISION

XYZ Member & Co. (253) on 10/19/2023 3:57:07 PM

Requested by : steve

RECENTLY VIEWED

(NO PRIMARY PHONE ON FILE)

MEETINGS

MERGES

CHANGES

Summary

Details

Trade/Alerts

Profile

Financial/Legal

Notes

Corporate SOS Search

State	Address	Phone Number	Email	URL
AK	550 W. 7th, Ste. 1700 Anchorage, AK 99501	(907) 269-7460	lt.governor@alaska.gov	Search
AL	PO Box 5616 Montgomery, AL 36103-5616	(334) 242-7200	Wes.Allen@sos.alabama.gov	Search
AR	256 State Capitol Little Rock, AR 72201	(501) 682-1010	info@sos.arkansas.gov	Search
AS	Territory of American Samoa Pago Pago, AS 96799	(684) 633-4116	lt.governor@go.as.gov	Search
AZ	1700 W Washington, Ste. 1700 Phoenix, AZ 85007- 2888	(602) 542-4285	sosadmin@azsos.gov	Search
CA	1500 11th Street Sacramento, CA 95814	(916) 653-7244	webmaster@sos.ca.gov	Search
CO	1700 Broadway, Suite 200 Denver, CO 80290	(303) 894-2200	secretary@sos.state.co.us	Search
CT	Capitol Office, PO Box 150470 Hartford, CT 06115-0470	(860) 509-6200	secretary@ct.gov	Search
DC	1350 Penn. Ave., NW - Suite 419 Washington, DC	(202) 727-6306	secretary@dc.gov	Search

press

ADD NEW



# Secretary of State Shortcut

bureau side/collections/debtor tab/ EDIT button

Added listing of Secretary of States for easy access. Click the SEARCH link to be re-directed to the SOS website. From the site, you will want to perform a search for the information and manually enter it in WebCMS.

Claim # : 164

Last Payment: \$0.00 (None)

**CLAIM #: 164**

Updated: 2/27/2023 11:13:08 AM

**Debtor**

Demo Debt    ☒

Principal: contact 1 contact 2 , contact title  
123 main st (3) Prim-(111) 222-3333

**Corporate SOS Search**

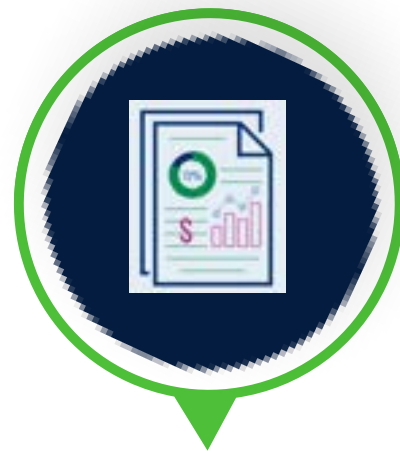
State	Address	Phone Number	Email	URL
AK	550 W. 7th, Ste. 1700 Anchorage, AK 99501	(907) 269-7460	lt.governor@alaska.gov	<a href="#">Search</a>
AL	PO Box 5616 Montgomery, AL 36103-5616	(334) 242-7200	Wes.Allen@sos.alabama.gov	<a href="#">Search</a>
AR	256 State Capitol Little Rock, AR 72201	(501) 682-1010	info@sos.arkansas.gov	<a href="#">Search</a>
AS	Territory of American Samoa Pago Pago, AS 96799	(684) 633-4116	lt.governor@go.as.gov	<a href="#">Search</a>
AZ	1700 W Washington, Ste. 1700 Phoenix, AZ 85007- 2888	(602) 542-4285	sosadmin@azsos.gov	<a href="#">Search</a>
CA	1500 11th Street Sacramento, CA 95814	(916) 653-7244	webmaster@sos.ca.gov	<a href="#">Search</a>
CO	1700 Broadway, Suite 200 Denver, CO 80290	(303) 894-2200	secretary@sos.state.co.us	<a href="#">Search</a>
CT	Capitol Office, PO Box 150470 Hartford, CT 06115-0470	(860) 509-6200	secretary@ct.gov	<a href="#">Search</a>
DC	1350 Penn. Ave., NW - Suite 419 Washington, DC	(202) 727-6306	secretary@dc.gov	<a href="#">Search</a>

47% ☒

47% ☒

47% ☒

# Friendly Reminder...



**NTCR**



**Insight  
Reports**



**Consumer  
Reports**



**Account  
Monitor  
Service**



**Trade  
Profile  
Report**

**Q & A**

**Thank You!**