



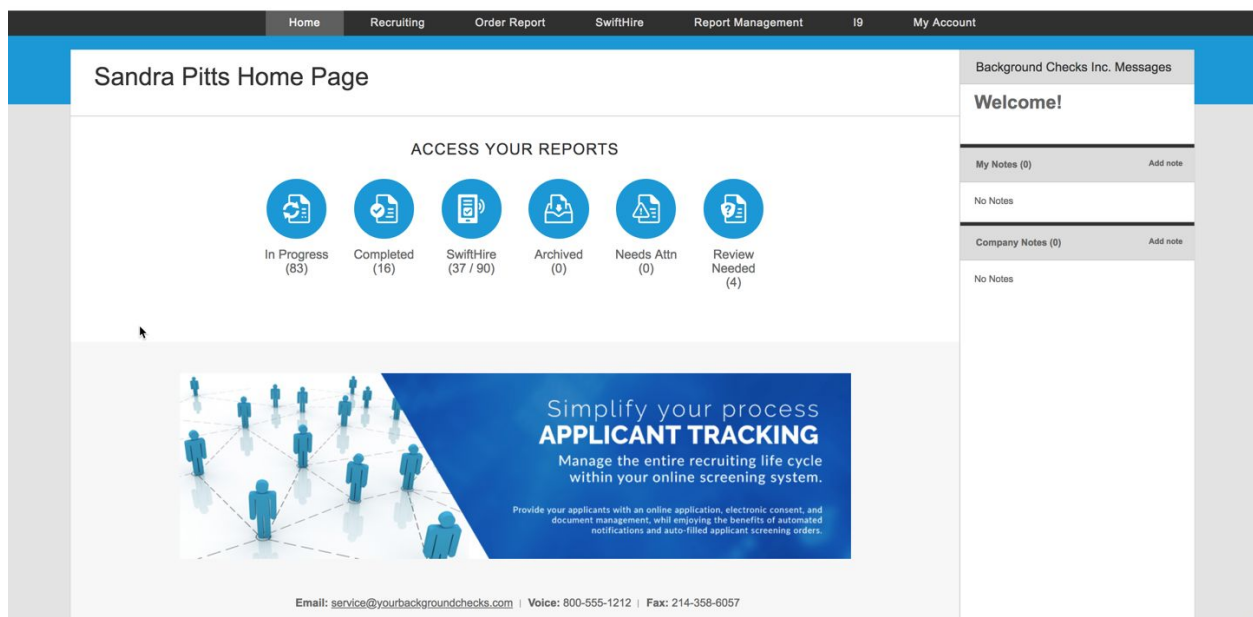
# Global Screening Solutions Ordering Guide

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## INTRODUCTION

Welcome to the Client Screening Portal, the easiest and most advanced way ever to order background screens and manage the results. From any computer, you can login and access your applicants securely, order a new report, and even change your own account settings.



Your client portal has been designed for quick access to the information you need most, whether you're looking up a specific applicant, finding all recent applicants with possible records or discrepancies, quickly ordering a standard background check, or compiling statistics for the last week or month.

This guide contains four main sections as follows:

- Ordering a report

- Finding a report
- Managing reports
- Managing your account

If you have any questions that are not covered in this manual, we encourage you to contact us directly.

## ORDERING A REPORT

To order a new report for an applicant through your client portal, just click the “Order Reports” button at the top to get started. From here, you will:

- Enter applicant information
- Choose a background package, or pick from a list of individual searches
- Auto-populate your searches
- Enter details for searches
- Confirm and submit your order

### Enter applicant information

At the top of the page, enter the basic information about the applicant, including name, date of birth, social security number, and address, as shown below.

If you leave out a required field - for example, if you leave out the date of birth when ordering a county criminal - the system will flag you upon ordering that you need to supply that field.

Depending on your setup, you may have one or more of the optional fields as shown below:

The image shows a screenshot of a web form with three optional fields. Each field is represented by a blue plus sign icon followed by the field name. The fields are: 'Additional Names to Search', 'Additional Addresses to Search', and 'Upload Document(s) for this Applicant'.

**Additional Names to Search**: Click this link to add one or more names as AKA's (maiden names or alternate names). This will allow you to order searches for multiple names simultaneously. You can add extra names by clicking + Add another, or remove a name you've already added by clicking the Remove link on the right.

**Additional Addresses to Search:** Click this link to add one or more sets of City, State, and Zip to the order.

**Upload Document(s) for this Applicant:** Click this link to upload a release form or other document that will accompany this background screening order.

**Document Upload**

---

Title	<input type="text"/>
Info	<input type="text"/>
File	<div style="border: 1px solid #ccc; padding: 2px;"> <span>Choose File</span>   <span>No file chosen</span> </div> <small>(bmp, csv, doc, docx, gif, jpeg, jpg, pdf, pdfx, png, rtf, txt, tif, tiff)</small>

---

**Current Documents**

Title	Info	Last Modified
No documents have been uploaded for the current level.		

**Email Applicant:** If an email is entered, then you can ensure that a final copy of the report is sent automatically to the applicant, in addition to being made available to you.

Send Report to Applicant:

by email

jdoe@company.com

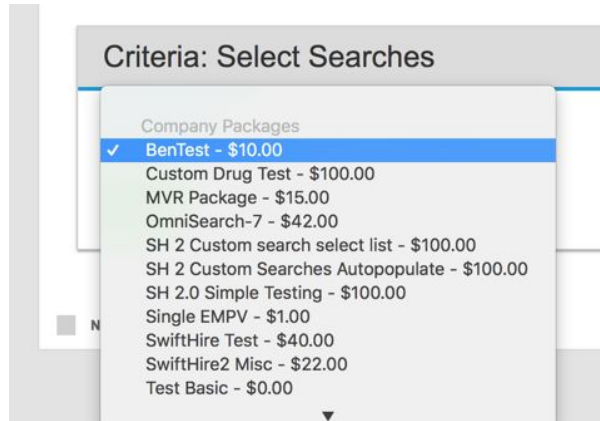
**Reference Code:** If you want to tag this search with a reference code, billing code, department code, or something similar, enter it into this field and it will be stored with your search, as well as appearing on the detailed invoice.

Reference Code

Email

## Choose a package, bundle or pick your searches

Depending on your setup, you may be able to order custom packages, individual searches, bundles, or all. Just choose an option.



Bundles, are just a group of a la carte searches “bundled together”. If you would like to save a “bundle for future use, please check the “save order configuration for future orders”.

Save order configuration for use in future orders

Set this as your default ordering package

Package Name \_\_\_\_\_

Setting a default package ensures that this package is highlighted as the first option when you first login. You will still be able to choose other packages.

### Auto-populate your searches

An option to auto-populate search locations based on an applicant's' past history may be configured for you. This means that the system will automatically fill in counties and states for several common criminal and civil searches based on the address (or addresses) you enter for the applicant, plus any addresses found by running a Past Address History search. This will save you a lot of time in entering your searches.

### Enter details for searches

When you pick a package, or as you click on individual search names to order them; any searches that require additional information will be indicated with a red icon; any searches that are complete will have a green icon, as indicated in the legend below the searches.

<span style="color: red;">!</span> County Criminal	info	Package	<span style="color: blue;">✕</span>
<span style="color: red;">!</span> Statewide Criminal	info	Package	<span style="color: blue;">✕</span>
<span style="color: green;">✓</span> Past Address History	1 Selected info	Package	<span style="color: blue;">✕</span>
<span style="color: red;">!</span> Sex Offenders	info	Package	<span style="color: blue;">✕</span>
<span style="color: green;">✓</span> Credit Report	1 Selected info	Package	<span style="color: blue;">✕</span>

Show More Searches

■ Not in order ! Needs work ✓ Complete

## Adding more entries to a single search

If configured, you can also add additional schools, employers, counties, and so on, under a specific search. Just click the **+ Add Another** link at the bottom of any search section after clicking the search title.

✓ County Criminal
 1 Selected
info
Package
✕

include additional name

TEXAS
⌵

TRAVIS
⌵

SAVE SELECTION
REMOVE

+ ADD ANOTHER

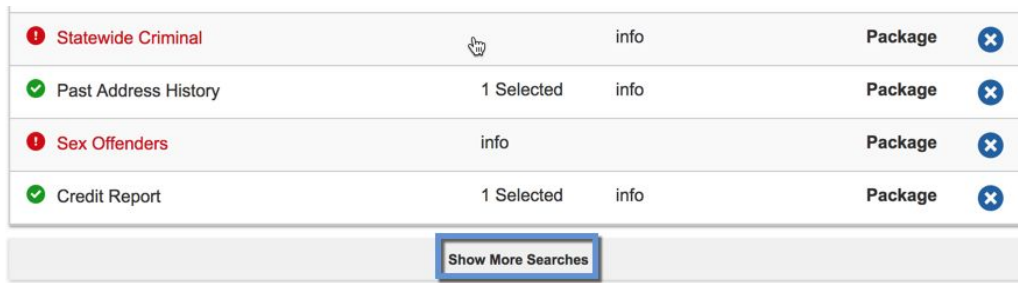
## Adding and removing search types

If this option is configured, you may add and remove searches listed.

To remove a search type, just click the X to the far right of the search name. If you remove it accidentally, just re-click the title to add it again; all your previously saved information will be remembered.

To add a new search, click any search name that's currently gray (meaning it's not part of the current order). This will change the search name to orange or green; if it changes to orange, you can add the details as mentioned above.

You will often have a Show More Searches button at the bottom, showing you searches that are not part of the package or that you have not ordered previously. Click this button to review other searches you can order.

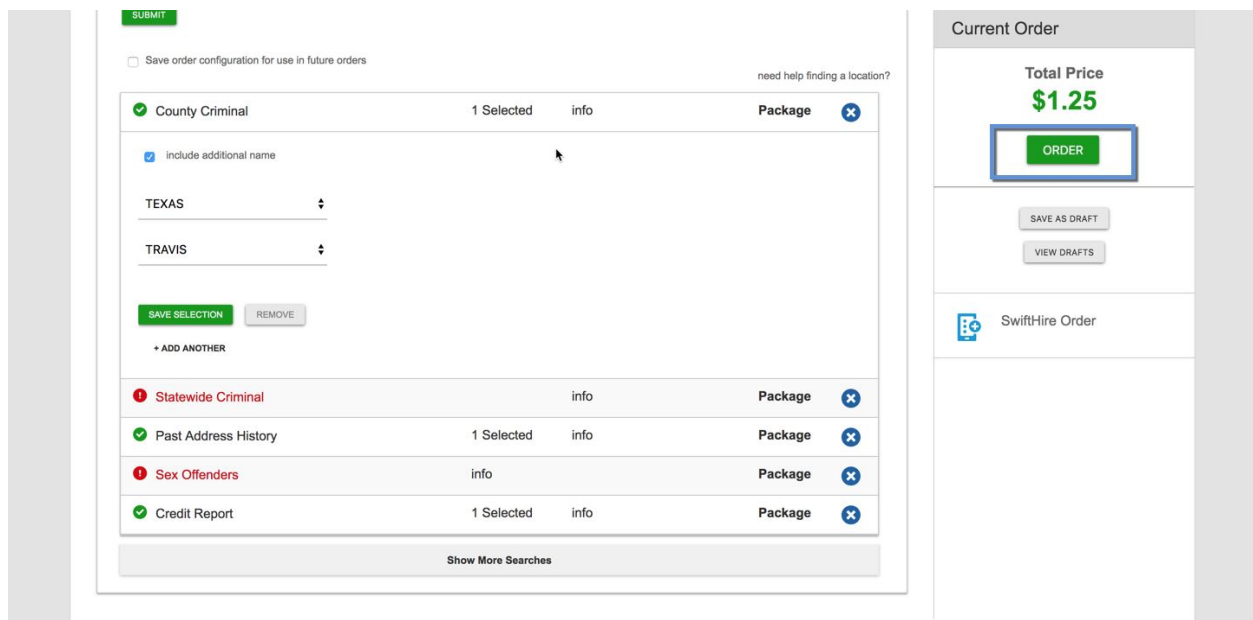


## Confirm and submit your order

When you have entered all necessary information, scroll to the top of the page. From here, you can click

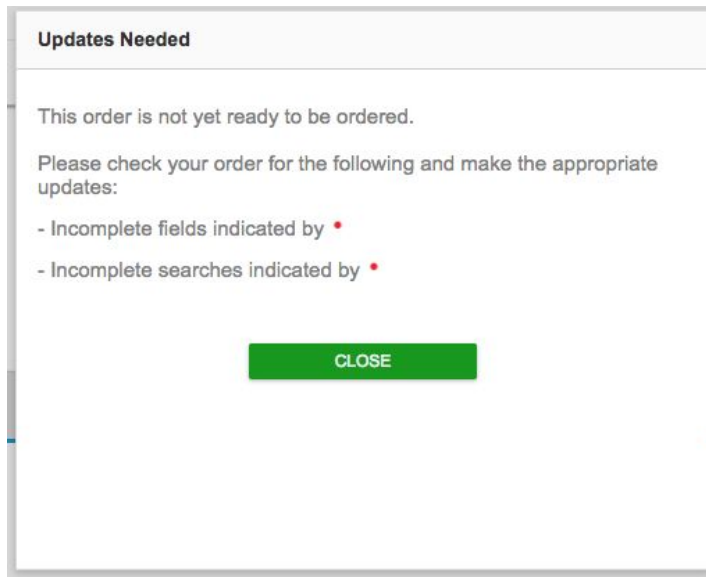


the button on the top right to confirm and place your order.



If any fields are not in the correct format, or any searches have not been saved (and still have a red indicator), you'll be prompted to make corrections before you submit.





## Monitoring

### Workflow

Monitoring is a report type to track events in a subjects Instant Criminal history on a recurring basis. This subscription service allows you to enroll a subject to be automatically checked for any new events in their Instant Criminal History. When an event is detected, the monitoring search type will be ordered.

### Enrolling in Monitoring

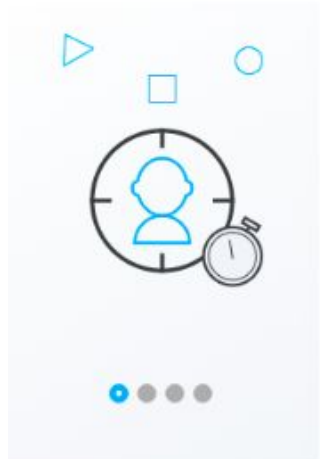
When logging into your portal, there is a tab titled Monitoring. Please contact us to discuss terms and pricing for enrollment.

### Enrolling a Subject

Once enrolled, you will be able to enroll subjects by selecting the Monitoring tab then clicking Enroll New Subject. After selecting Enroll New Subject, the enrollment Wizard will pop up.



For users that have the Branch ordering permission enabled and clients in a branch, the first screen of the enrollment Wizard will request which branch and which branch user to order for.



Please select Branch and Ordering User.

Branch: Client 1

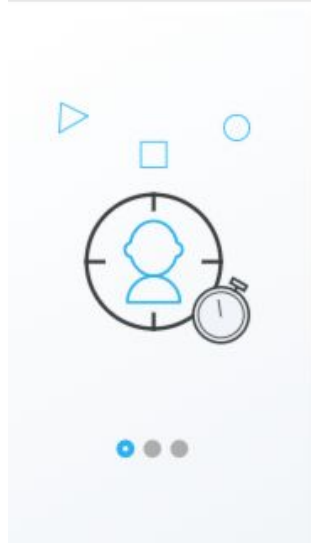
Ordering User: Jane Worker

Skip this step [Continue](#)

If branch ordering is not desired, select *Skip this step* to order for your own branch. Organizations that do not use branching or users that do not possess the branch ordering permission will not be presented with this step.

The next screen is entering the candidates' information.

### Enroll in Monitoring



Please enter subject info to enroll in monitoring

First Name: Walter

Middle Name:   No Middle Name

Last Name: White

Date of Birth: mm/dd/yyyy

SSN:

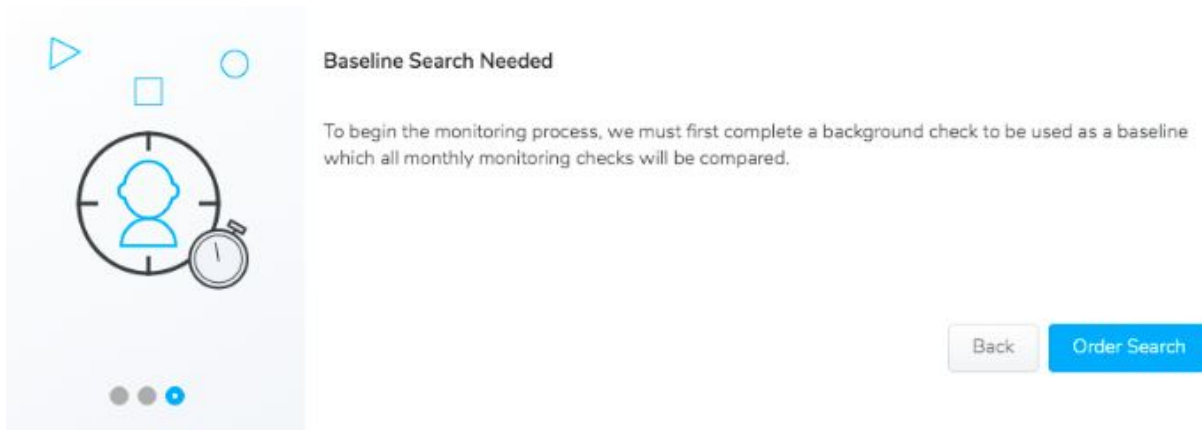
[Continue](#)

- **First Name** - Required
- **Middle Name** - Required or select the option for No Middle Name
- **Last Name** - Required
- **Date of Birth** - Required
- **SSN** - Required

The next step is to complete the required acknowledgment.



The last step of enrolling a subject is to order a baseline search. This means an Instant Criminal report type will be ordered. This is the baseline search that initiates monitoring and the subject will show in the status of Pending.



A subject enrolled in monitoring will go from the status of Enrollment Pending to Enrolled when the Instant Criminal search type completes.

## Monitoring

All	6
Pending	1
Enrolled	3
Unenrolled	2

### 1 reports

Subject Name	DOB	Status
Walter White	11-11-****	Enrollment Pending

25

## Enrolling multiple Subjects

The option to enroll multiple subjects is available with the Upload CSV feature.

Upload CSV

Upload a CSV file to batch enroll a list of subjects. ⓘ

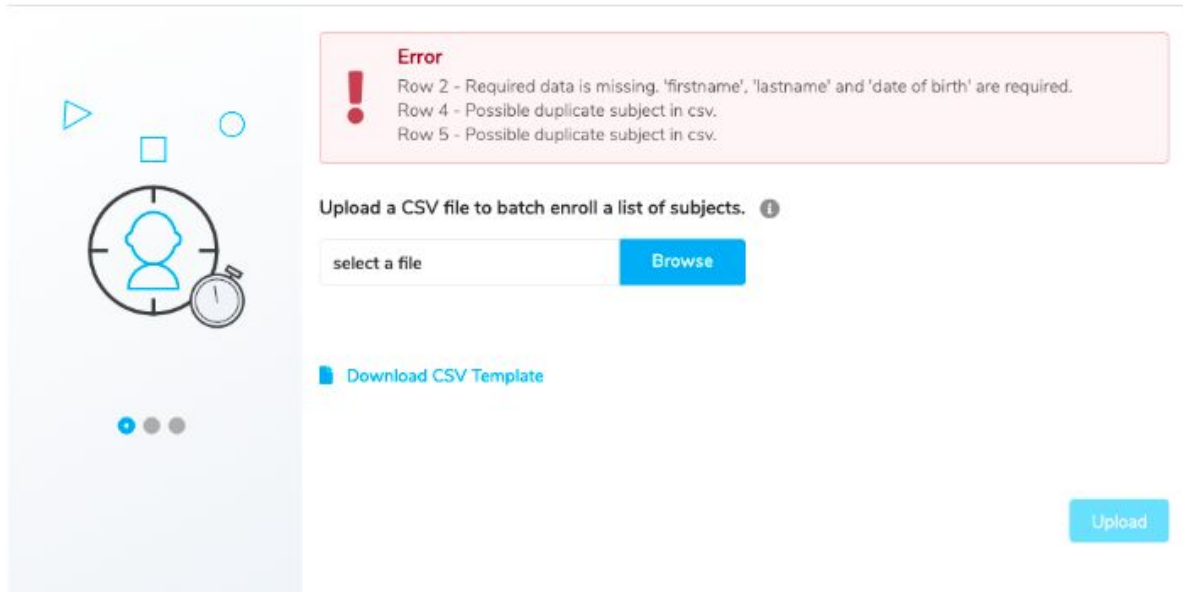
select a file
Browse

Download CSV Template

Upload

The enrollment wizard takes you through each step and provides a CSV template to download and use to build out your next bulk enrollment batch.

Should there be any errors with the CSV template, the enrollment wizard will display error messages for each row where an error is present. If any errors are present in a CSV upload, the process will not run and the CSV file errors will need to be resolved.



## Viewing the Monitoring Board

You can view the Monitoring board from clicking the Monitoring tab. There are 4 statuses that a subject can be in. They are **All**, **Pending**, **Enrolled** and **Unenrolled**.

**Enrollment Pending** - A baseline search has been ordered.

**Enrolled** - A baseline search has been ordered and completed. The subjects INCR history is checked on a monthly basis.

**Unenrollment Pending** - After unenrolling a subject, they might be seen in this status for a short moment.

**Unenrolled** - The subject has been unenrolled.

The screenshot displays a dashboard for reports. On the left, there are filter buttons: 'All' (30 reports), 'Pending' (13), 'Enrolled' (12), and 'Unenrolled' (5). On the right, there is a search bar labeled 'Subject Name' with a search icon. Below the search bar, the text 'walter white' and 'Jessica Test6' is visible, suggesting search results or filters.

Each view will contain the following Columns:

Subject Name, DOB, Status, Last Updated, Action, Date Enrolled, Date Unenrolled, Location, Enrolled by Username, Unenrolled by Username, HR Client User. Each column can be dragged to change the order as they appear. The column headers can be clicked to arrange the order of subjects in that view also. Below is a description of some of the headers.

**Subject Name** - This will be a link to the report from the completed baseline Instant Criminal search that initiated the subject into the monitoring product.

**Last Updated** - This will be a link to the most recent report generated from an event in the subjects INCR history to see if any events ( changes ) had occurred.

**Date Enrolled** - This is the date that the subject was enrolled into monitoring.

**Date Unenrolled** - This is the date that the subject was unenrolled from monitoring.

**Enrolled by Username** - This is the userID of the HR user that enrolled the subject in monitoring.

**Unenrolled by Username** - This is the userID of the HR user that unenrolled a subject. This will only be populated if a subject has been unenrolled from monitoring.

**Action** -If a subject has been enrolled into monitoring, the action field will be Unenroll. If a subject has been unenrolled, this will populate as Enroll. This is how the subject can be re-enrolled into Monitoring.

**HR Client user** - This is the full name of the HR user that the subject was ordered under. This does not have to be the same as who enrolled the subject if Branch ordering was used.

**\*NOTE\*** It is important to note that the monitoring board will not indicate if a search has been generated as part of an event or if an event has been detected at all. If an event is detected, the new report type is ordered and we, as your CRA provider, will process that order that will then be visible in the Report Management section of your Client Screening Portal.

**\*NOTE\*** It is important to note that changes in Instant Criminal history to trigger an event do not necessarily need to be negative. A non-negative example of an event that would trigger the new search type would be if a dispute were resolved or if a criminal record were dropped or dismissed.

**\*NOTE\*** Although this service runs monthly, events that trigger the monitoring report do not necessarily need to have happened within the past month. Cases only need to have been added or updated to the subjects search history to be considered an event. It is likely that events can be older than 30 days because some resources update cases on a weekly, monthly, quarterly, or yearly basis.

## FINDING AN APPLICANT

### Quick Find

You can use the Quick Find, located at the top of almost every page in your portal, to locate an applicant by first or last name. Just start typing the first few letters of the first or last name, and the system will suggest a list of matching applicants.

Find an Applicant?  **OPTIONS**

### Advanced Search

If you need to search for applicants by date of birth, social security number, date ordered, or any combination of factors, you can use the Advanced Search, which is linked at the top of most pages (next

to the Quick Find) as shown below.

## REPORT MANAGEMENT

### Dashboard and Report Status Icons

On the homepage or in “Report Management” you'll see a listing of statuses and number of applicants in each status.

#### ACCESS YOUR REPORTS



Just click the appropriate icon, and you'll get a list of all the applicants in that status. Here's a brief explanation of each status.



**In Progress:** The applicant still has one or more searches that have not been completed. This way, you can keep track of an applicant in real time, even if there are a few searches still pending.

**Completed:** The applicant's background check is completely finished. You can leave an applicant in this status as long as you like; eventually, you should move completed applicants to the Archived category as explained next.

**Archived:** You can move Completed applicants to the Archived category once you no longer need to actively monitor their background check. By doing this, you can use the Completed category more effectively to monitor recently completed applicants.

**Needs Attn:** This category conveniently shows only applicants that have either 1) an unread status update, or 2) missing information that you need to supply. We recommend that you use this category frequently, as it allows you to more efficiently monitor applicants.

**Discrepancy:** This category shows you all candidates that have a criminal record, unverified school or employment record, or positive drug test. In other words, you can quickly access applicants that may require adverse action using this category.

## Notification Icons



The blue envelope icon indicates that you have not yet looked at this applicant. Once you click and view the applicant, the icon will disappear.



The green bubble means that there is an unread status update. Applicants with this icon will show up in the Needs Attention category. Once you view the applicant and read the status update, the icon will disappear and the report will no longer display under Needs Attention.



The yellow magnifying glass icon indicates a search needs to be reviewed. This could several different things, such as a criminal record, unverified school or employment record, or positive drug test. Any applicants with this icon will show up in the Review Needed category. You can review the specific item by clicking the icon or the applicant name; see Managing Applicants for more information.

Next to each applicant, you'll also see a status bar, which shows you how many searches are completed for that applicant's background check. The status bar is updated in real time, so you can check online any time you wish. If an applicant has a complete background check, the report will move to the completed category.

## Sorting the applicant list

Each column heading in the list of applicants can be clicked once to sort by that column, or clicked twice to reverse sort by that column. By default, the list is sorted by applicant name, but you can sort by which applicants are unread, which applicants have discrepancies, and so on by simply clicking the appropriate heading.

## Applicants: In Progress

 ▲ APPLICANT	DATE ORDERED	STATUS	DONE		
Borz, Test02131636	02/13/2018	<input type="text"/>	0 of 13		<input type="checkbox"/>
Boyko, Brian	11/02/2017	<input type="text"/>	0 of 4		<input type="checkbox"/>
Bro, Test02211307	02/21/2018	<div style="width: 10%; background-color: yellow;"></div> <input type="text"/>	1 of 11		<input type="checkbox"/>
CK Louis	09/30/2017	<div style="width: 20%; background-color: yellow;"></div> <input type="text"/>	2 of 9		<input type="checkbox"/>

## Archiving Applicants

If you bring up all completed applicants, for example, you'll see checkboxes along the left allowing you to quickly archive one or more applicants. (These checkboxes will only show next to completed applicants, since you can't archive an applicant still in progress.)

Johnson, Test02121604	02/12/2018	<div style="width: 10px; height: 10px; background-color: green;"></div> Meets qualific...	<input type="checkbox"/>	<input type="checkbox"/>
Johnson, Test02061653	02/06/2018		<input type="checkbox"/>	<input type="checkbox"/>

[View All](#)

1 - 8 of 16 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Check all

[ARCHIVE SELECTED](#)

Just check off the applicants you wish to archive, and then click the button at the bottom.

If you wish to archive all completed applicants at once, click the Archive all link next to the Completed category.

You may also “archive all” reports using this on the completed icon:



Completed (16)

[Archive all](#)

## Managing Applicants

There are several ways to manage applicants in your online screening portal, including viewing complete reports, requesting status updates, archiving applicants, and ordering more searches. To begin managing an applicant, simply find the applicant you desire (as explained in Finding an applicant).

Here's a typical detail window - in this example, for an applicant still pending completion.

### Applicant: Detailed View

[Back to List](#) [Previous Applicant](#) [Next Applicant](#)

**Berngen, Eric**

---

SSN: 123-45-\*\*\*\*  
 DOB: 10/28/\*\*\*\*  
 Email: ebergen@company.net  
 Phone: 555-555-5555

Ordered: 08-23-2017  
In Progress

5 of 7 Completed

---

REPORT ACTIONS

VIEW ACTIVITY HISTORY

---

VIEW	SEND	ORDER	OTHER
view reports print report	e-mail report	order more re-screen this applicant create form I9	upload document(s) for this report

---

VIEW DOCUMENTS

Search Types	Done				
<ul style="list-style-type: none"> <li style="margin-bottom: 5px;"><span style="color: blue;">Education Verification - Some school</span></li> <li style="margin-bottom: 5px;">Sex Offenders - Tennessee</li> <li style="margin-bottom: 5px;">Employment Verification - Random Name</li> <li style="margin-bottom: 5px;">County Criminal - Davidson, Tennessee</li> <li style="margin-bottom: 5px;">Past Address History</li> <li style="margin-bottom: 5px;">Federal Criminal - Tennessee Middle</li> <li style="margin-bottom: 5px;">Statewide Criminal - Tennessee</li> </ul>	<div style="font-size: small;"> <input type="checkbox"/>  <input checked="" type="checkbox"/>  <input type="checkbox"/>  <input checked="" type="checkbox"/>  <input checked="" type="checkbox"/>  <input checked="" type="checkbox"/>  <input checked="" type="checkbox"/> </div> <div style="margin-top: 10px; font-size: small;"> <p><b>Education Verification</b></p> <p>Details: Some school  <span style="color: green;">In Progress</span>                      Status request</p> </div>				
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid #ccc; font-size: x-small;">Education Verification Documents <span style="float: right;">Add doc</span></td> <td style="font-size: x-small;">Education Verification (My Notes) <span style="float: right;">Add note</span></td> </tr> <tr> <td style="border-right: 1px solid #ccc; font-size: x-small;">No Documents</td> <td style="font-size: x-small;">No Notes</td> </tr> </table>	Education Verification Documents <span style="float: right;">Add doc</span>	Education Verification (My Notes) <span style="float: right;">Add note</span>	No Documents	No Notes	
Education Verification Documents <span style="float: right;">Add doc</span>	Education Verification (My Notes) <span style="float: right;">Add note</span>				
No Documents	No Notes				

#### Education Verification Activity History

No Activity History

Unread  
 Status Update  
 Needs Attention  
 Review Needed  
 Archived

## Report Options

At the top of the page, you'll see the report summary, with the main information on the applicant, the current status (In Progress for the sample above), and the report progress bar and iconic notifications on the right. (See Icon notifications under Finding an applicant for details on what these icons mean.)

**View Report Options** link just under the DOB in this top summary. You can click this link to open up further options as shown below:

**View report:** This link does the same as clicking the applicant name or status; it brings up the complete report in a separate window for viewing. You may also click the applicant's name or the status.

**Print Report:** This link also brings up the complete report, but in addition, it will automatically initiate printing of the report and allow you to choose a printer like usual. (If you want to print the report but you used the view report link, just press CTRL+P on a PC or Command+P on a Mac. This works for any web page.)

**Order More:** Click this link to order more searches for this applicant, which will become part of the same report. For example, you can use it to order a pre-adverse action letter for an applicant who failed their background check.

**Re-Screen this Applicant:** This link allows you to order an entirely new copy of the same report for this applicant, and it auto-fills all the information. That way, you can run all the same searches again, or you can remove or add searches as you see fit (as explained in Enter details under Ordering a report).

**Upload Document(s) for this Report:** Use this link to upload any documents needed to process this applicant. For example, if the report requires a release form, and you did not upload the release form during the screening process, you can do so now.

## Search Options

Below the report options, you'll see a listing of all searches that are part of this applicant's report. Next to each, you'll see icons that show whether the search has a discrepancy, an unread status update, or needs your attention due to missing data (as explained in Icon notifications under Finding an applicant).

To the right of each search name is a box that may or may not contain a checkmark. If the box contains a checkmark, then the search has been completed; if it does not, then the search is still in progress.

You can click on any search name to bring up details and options in the right half of the screen. For example, if the search has a record, you'll see a Record link. You can click this link to bring up the details on that search from the final report - not the whole report, but just the portion that pertains to this search. This way, you can quickly see the details of the search without scrolling through the entire report.

## Status Request



If the search has the Needs Attention icon, then you'll see a request for missing information in the Notes section at the bottom left after you click that search. The status request can be used to send messages to your background check provider over a particular search.

**Request Status**  
 Enter a note if you wish to request the status from Background Checks Inc..

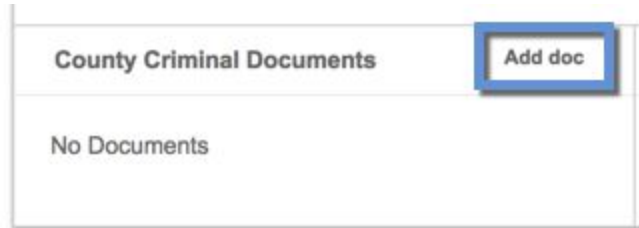
[SEND REQUEST](#)

Select a message if you wish to request the status from the researcher directly.

[SEND REQUEST](#)

## Uploading Documents

You may upload documents at anytime during the ordering process, or after using the “add document” feature on the search details view:



## MANAGING YOUR ACCOUNT

To access your account settings, just click the My Account tab in the upper right corner. Then you can use the links along the right to find the section and page you're interested in. Each is explained below.

### My Account

#### Profile

There are up to five different sections you can access under the Profile section; each is a separate link on the left-hand side. Each link is explained below.

#### My Account Info

This section allows you to update basic profile information about yourself, including:

- **User Information:** You can update the name, phone number, and main email address for your account. This may affect the header on your applicant reports. Note that you cannot change your user ID that you use to log into the system.
- **User Options:** If you are an administrative user, you can add and remove your own user permissions here. If not, you'll need to ask your main administrative user if you need access to a new feature.
- **Screening Statistics Report:** Choose how often you'd like to receive the Screening Statistics Report via email. You can also run this report any time for any time period as explained below.

## My Results Delivery

Use this link to change how you receive system notifications, as well as how often you receive them.

**Communication Method:** Choose how you want the system to send you reports and notifications. You can choose Email, Fax, Email & Fax, or Online Only (meaning you get no notifications at all from the system and must check online for notes and results).

**Result Delivery Timing:** These options allow you to choose how often the system sends you notifications about reports.

- **Send Immediately:** You will get an update each time a search is completed for an applicant. That is, if one applicant has 6 different searches, you'll get up to 6 different emails - one each time that one or more searches is completed.
- **When Report is Completed:** You will get an update when the entire report is complete for the applicant. This is the most common setting.
- **Batch Searches:** If you order a lot of searches, you can receive updates every two hours when searches complete. Any searches that have been completed since two hours ago will be sent to you in a single email.
- **Batch Reports:** This is just like the previous option, except that you will only get an email if one or more reports were completed in the last two hours.
- **Online:** You will not receive any notification when searches or reports are completed. You will, however, receive notifications of updates or items that need attention, assuming you choose a communication method other than Online Only.

## My Password

Access this page to update your password used to access your client portal. Just enter your old password, then enter your new password twice to confirm. Once you press enter, your password will be changed the next time you log on.

If you don't remember your password, you can use the [Forgot Password?](#) link on the client portal login page to retrieve it.

## Company Info

You'll only see this link if you have administrative access. You can use it to modify the company name, email address, address, and fax number that normally appear as the return address on your final reports.

In addition, you can modify the accounting email and accounting fax which are used to send you invoices.


## Reference Numbers

This tool allows you to set references that you can choose from during your ordering process to help you track your orders. If reference options are added, you will have a selection box on your ordering page containing all the options below.

## My Documents

You can access any documents we have made available to you from this page, securely and conveniently. Just click any document link to download it to your computer.

Profile: My Documents

 Profile ▾

Title	Doc Type	Description	Date
Standard Consent Form	Standard		03/30/2018
Required Doc 2	Standard		03/30/2018

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## User Info

Only administrative users see this section, which allows you to create and modify other users.

## Add User

Click this link to create a brand-new user on the system - for example, if you hire another person in HR who will order or manage reports. You will need to fill out:

**User Information:** Here, you'll need to fill out a user ID (which must be at least 6 characters with no spaces) and a password (which must be at least 6 characters including at least one number, and no spaces) for the user, along with a contact name (first and last), phone, and email.



## User Options

### User Options

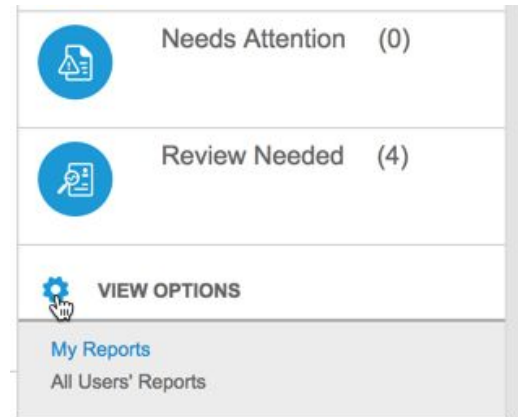
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<input checked="" type="checkbox"/> View Other Users' Reports <input checked="" type="checkbox"/> View Pricing <input checked="" type="checkbox"/> Display Report Box <span style="font-size: 0.8em; margin-left: 20px;">for All Users' Reports</span>	<input checked="" type="checkbox"/> View Accounting <input type="checkbox"/> Restrict Results Viewing <input type="checkbox"/> Restrict Ordering <input checked="" type="checkbox"/> Screening Stats <div style="text-align: right; margin-top: 10px;"> <input checked="" type="checkbox"/> Change Grade         </div>
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Here, you can choose which permissions to give the new user, including:

- Active: You must check off this box to enable the user to log in.
- Administrator: If you check this box, then the user can do everything you can do in the client module, including:
  - Change his/her own user permissions
  - Add other users and choose their permissions
  - Change contact info and permissions (but not passwords) for current users

- View Other Users' Reports: Check this box to allow the user to view not only his/her own ordered reports, but also reports ordered by other users.
- View Branch Reports: If your company manages branch locations through your client module, check off this permission to enable the user to see reports from branches as well as his/her own reports.
- View Accounting: Check this box to allow the user to view and print invoices through the Accounting link under the My Account tab in the client module.



- Display Applicant Box for All Users' Reports: If you check this box, then the user will always see all users' reports, not just his/her own, by default in the Screening Status Box in the client module.
- Leave this box unchecked to allow the user to see only his/her own reports by default, with the ability to change that when desired.
- Order for Branches: If your company manages branch locations through your client module, check off this permission to allow the user to place orders for branches of his company.

- **Restrict Results Viewing:** Leave this *unchecked* for most users. If you check this option, then the user *cannot* view the detailed results of any reports. He/she can view the summary and status of reports and searches; however, the view report and print report links are removed.
- **Restrict Ordering:** Leave this *unchecked* for most users. If you check this option, then the user *cannot* order reports at all. Checking this option disables the Order tab at the top, as well as the add searches to this report link that appear on reports in the client module.

## Add Branch User

Here you have the same functionality of adding a user, but now you can assign this user to a particular branch.

## Edit User

Click this to bring up a list of all other users in your client portal. You can then click and edit any of these users, using the same fields described above under Add User.

## Accounting

This section allows you to view and print past and current invoices, paid or unpaid, using the Invoices link. This way, you can securely retrieve any invoice you need at your convenience.

## Pricing

You can view both overall search costs and state- or county-specific search costs using the My Prices link. Also, you can review court fees for various search types and locations using the Court Fees link. Either link displays a simple table of prices for you to review or print.

## Reports

From here, you can click Screening Statistics to run a statistics report for your company for any date range you choose, as shown below.

Just pick a standard date range, or choose Custom Date and enter any two dates you wish (in mm/dd/yyyy format). When you click, the system will create a statistical report showing all kinds of data from the date range in question.

Remember that you can also have this report automatically compiled and sent to you at your convenience using [My Account](#)> [Profile](#)>[My Account Info](#).