



USER'S GUIDE: GETTING STARTED

LOGGING IN FOR THE FIRST TIME

Go to: www.candidresearch.com

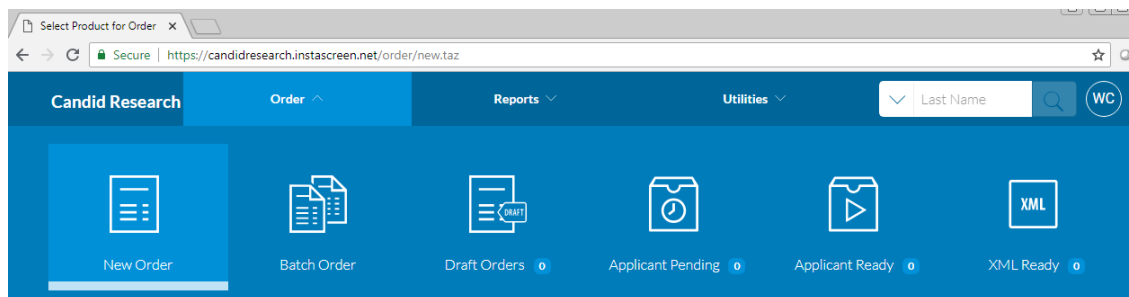
Click on the LOGIN button in the top right corner to access our secure site
Enter your username and password, and click LOGIN

The system will ask for you to set up security on your account:

1. MFA Method: How would you like to verify your identity in the future?
If you select TEXT, please enter your cell phone number
If you select EMAIL, please enter your email address
2. Security Questions: Please select 3 questions and provide the answers that will enable you to verify your identity in the future.
3. Now the system will send you a MFA message via text (or email) with an authentication code.
Please enter that code and click VERIFY.
4. If this is a secure computer, you may want to check the box that says "Remember this computer" so you will not have to authenticate this device every time you use it.
5. Customize your password

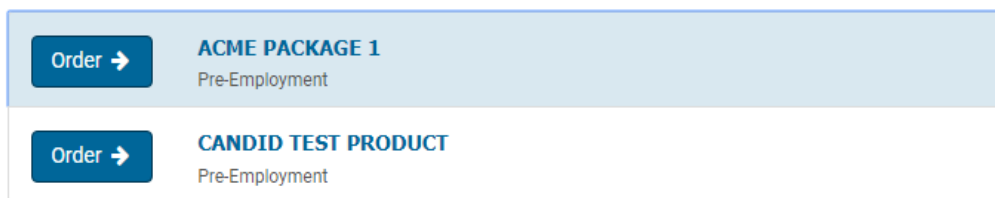
PLACING AN ORDER

Once you've logged in, you will automatically be taken to our home page. To place an order, hover over the word **ORDER** on the top navigation bar and click on **NEW ORDER**. Select the Package that you would like to run



Select Product for Order

Acme Manufacturing



Next, the system will show you the searches that are required/optional in the package you selected.

The searches with the checkmark are the searches that are required in this package.

The searches without the checkmark are optional.

To add a search to your order, check the box next to the search you would like to include.

Select Searches for Order

Acme Manufacturing



To continue, you must acknowledge the CERTIFICATION, by clicking on ACCEPT TERMS.

APPLICANT SCREEN: This is where you enter the applicant 's information.

Reference: This is an open text area, where you can put anything you would like. This field is searchable and will also show up in invoices and reports. At your request, we can make this a customized drop-down list.

Email Address: It is very important that you add an email address for your applicant, so if they request a consumer copy or we have to send them adverse actions notices, the system can automatically deliver them via email. If the applicant does not have an email address, please enter noemail@candidresearch.com and we know to mail these copies via USPS.

Former Name/Alias: Please click the + button to add any aliases or alternate names in this field.

TO AVOID UNNECESSARY FEES AND DELAYS, PLEASE DOUBLE-CHECK THE ACCURACY OF THE INFORMATION YOU SUBMIT ON THIS SCREEN

Reference:

ACCOUNTING DEPT

Applicant Info

Please provide the applicant's **legal name** as shown on a driver's license or other government issued identification.

* Last Name: * First Name: Middle Name: Generation: * SSN: * DOB:

E-mail Address: Driver License No.: DL State:

+ Former Name/Alias

Cancel

Next →

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PRE-SEARCH RESULTS: Our system will alert you if you have previously placed an order for this applicant. If this is a duplicate, you can cancel the order now. To proceed with this order, just click the NEXT button.

Pre-Search Results

Acme Manufacturing - Acme Package 1
Order Entry *step 2 of 6*

The following reports were previously ordered, matching on applicant name, SSN and/or email. If you continue, you may create a duplicate order.

Name	SSN	File	Client Name	Requestor	Ordered	Status
MESS, HANK AARON	123-45-6789	129513	Acme Manufacturing	Coyote, Wyle	2017-02-07	Complete

ADDRESS SCREEN: Please enter the applicant's current address and all previous addresses. This will allow the system to prompt for searches in all areas where the applicant has lived.

Current Address

Domestic International

Current Address

123 HAPPY ST.

92865

ORANGE

CA ▼

+ Previous Address

ORDER SUMMARY: This is a summary of the information you entered and searches you are running. Please review for accuracy.

CONSUMER COPY: If your applicant has requested a copy of his report, please check the CONSUMER COPY box and make sure you have provided an email address for the applicant. Our system will automatically generate an email to the applicant with a copy of his report as soon as it is completed.

Order Summary

Acme Manufacturing - Acme Package 1
Order Entry *step 6 of 6*

Applicant:  **HANK AARON MESS**
(123-45-6789, 01/01/1990)

Current Address:  **123 HAPPY ST.**
ORANGE, CA 92865

Search Summary for Acme Package 1	
Person Search	Person Search - SSN Trace / Address History
7-Yr County Criminal Search	
National Criminal Database Pkg (includes OFAC, SAM, Sex Offender Registry)	

Authorization: None Attached

Select authorization file to attach to Order:

Upload File


No file chosen
- or -

Drag File

Drop Zone

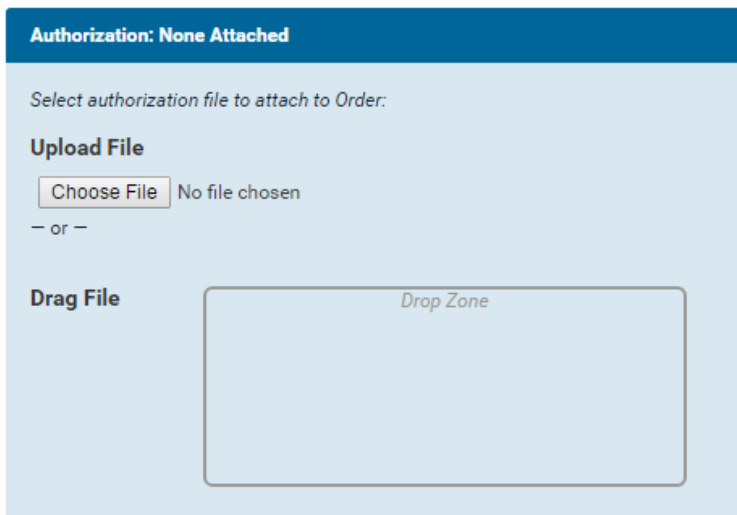
Order Entry Notes

Send Consumer Copy to Applicant



UPLOAD A CONSENT/AUTHORIZATION FORM: On the ORDER SUMMARY screen, in the lower left section called AUTHORIZATION:

1. Click on CHOOSE FILE
2. Find the file you wish to upload and double-click on it from your computer or simply drag the file and drop it into the DROP ZONE
3. You can also upload other forms at any time, by going back into the order and clicking on ATTACHMENTS



The screenshot shows a web interface for uploading an authorization form. At the top, a dark blue header reads "Authorization: None Attached". Below this, the text "Select authorization file to attach to Order:" is displayed. Underneath, there is a section titled "Upload File" which contains a "Choose File" button and the text "No file chosen". Below the "Upload File" section, there is a section titled "Drag File" which contains a large rectangular box labeled "Drop Zone".

Once you click COMPLETE ORDER, your order will go into PENDING status, while your report is being processed.

You will receive an email notification when your report is completed.

Please let us know if you have any questions.

Thank you!

Candid Research, Inc.