

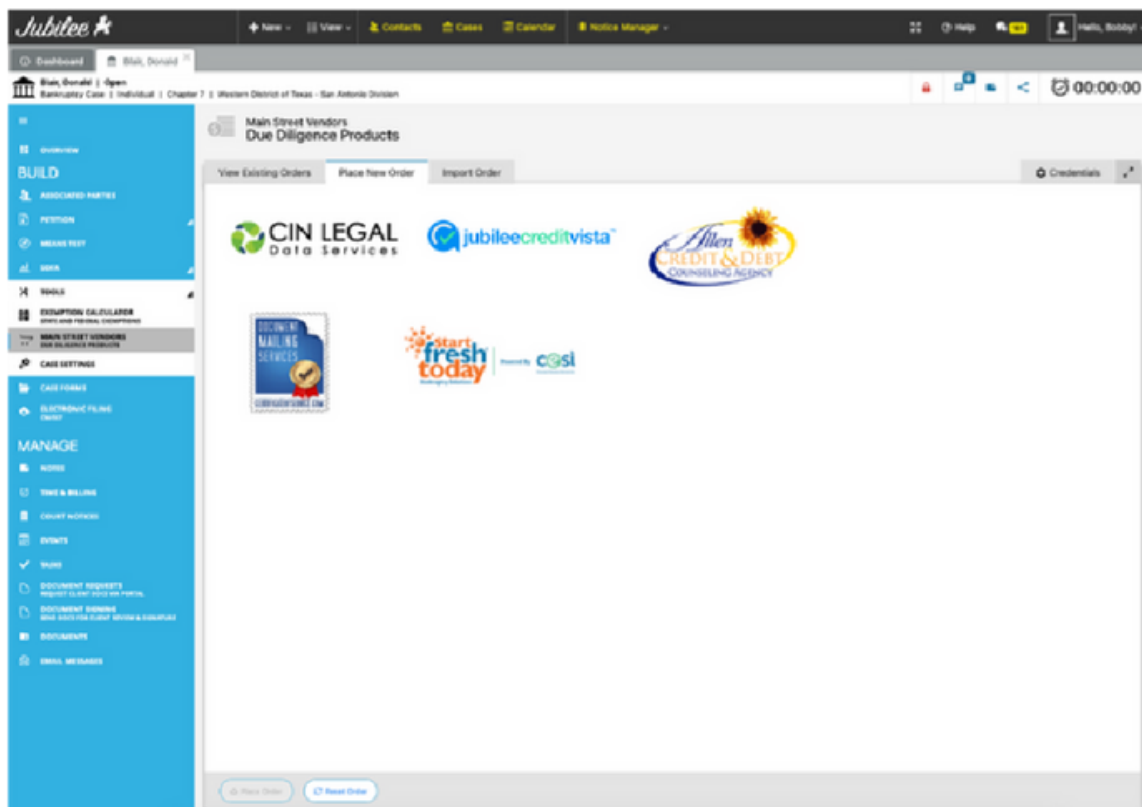
Importing Credit Reports with Jubilee CreditVista™

Jubilee CreditVista™ is LegalPRO's best offering for ordering credit reports. The creditor information can be imported directly onto the schedules to help avoid data entry errors and save time! Jubilee CreditVista™ is priced at \$24.95 which includes a 3-bureau credit report for the debtor.



How it works

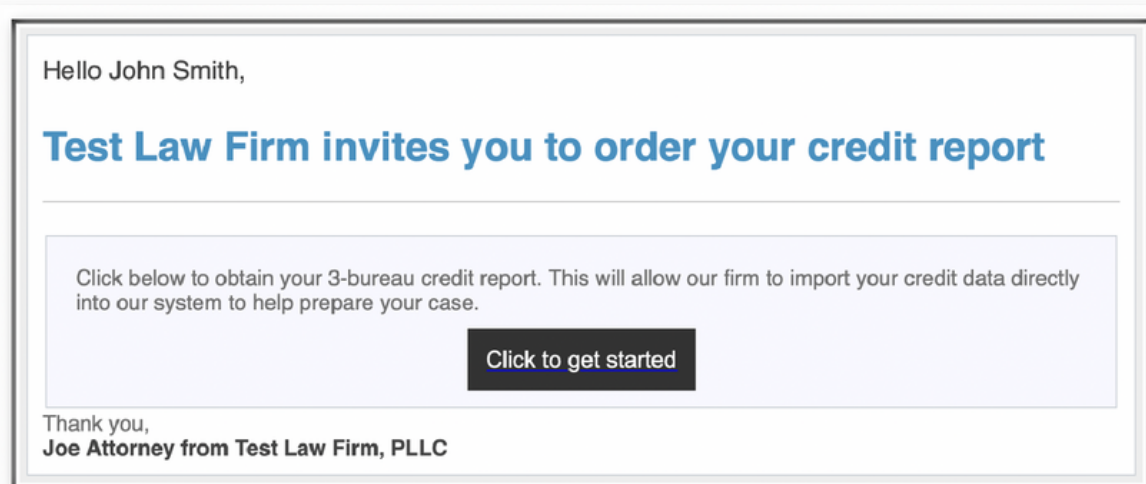
1. From within the case in Jubilee, go to Main Street Vendors – Place New Order – Jubilee CreditVista™.



2. Next, you will have options to confirm the debtor's email for the invitation link, edit the text of the invitation email, and verify the notification email address where you would like to receive notice of completion of the order.

The screenshot shows the 'Main Street Vendors Due Diligence Products' interface. The left sidebar contains navigation menus for Overview, Build, Manage, and Case Forms. The main area is titled 'Place New Order' and includes sections for 'Credit Report Options' and 'Invitation Options'. In the 'Credit Report Options' section, the checkbox 'Receive notification when order is complete' is checked, and the 'E-Mail Address to Notify' is set to 'notifications@lawfirm.com'. The 'Invitation Options' section shows the 'From Name' as 'Joe Attorney from Test Law Firm' and the 'Reply to E-mail Address' as 'notifications@lawfirm.com'. The 'Subject' is 'Invitation from Test Law Firm to order your credit report.' The 'Message' field contains the text: 'Click below to obtain your 3-bureau credit report. This will allow our firm to import your credit data directly into our system to help prepare your case.' At the bottom, the 'Client' is 'Smith, John' and the 'Send Registration Link' is 'Via E-Mail' to 'debtor@debtor.com'. There are 'Send Invitation' and 'Reset Order' buttons at the bottom of the form.

3. The debtor will receive an emailed invitation where they can click on the link to start the order process.



4. The debtor will need to enter their Date of Birth and Social Security Number then click Submit.

Jubilee * Jubilee Credit Vist... x

Verify your identity

Date of Birth

Complete Social Security Number

Submit

5. The debtor will need to click on the “Verify Your Information button”.

Jubilee * Jubilee Credit VI...

Client Registration & Authentication

Please click below to get started.

Smith, John Pending Verification [VERIFY YOUR INFORMATION](#)

6. After the debtor confirms their information, they can click on the Continue button to answer the authentication questions. NOTE: If the information is incorrect, the debtor will need to contact the law firm to update the information within the Jubilee case file then they can be instructed to click on the emailed link again.

Complete Authentication Questions for Smith, John

If any information is not correct, please contact your attorney to update.

Name	Address	Details
First Name John	Street 1818 N. Main	Date of Birth 01/01/1980
Last Name Smith	City State Zip Corpus Texas 78418	Social Security 123-12-1234
	Christi	E-Mail Address john@smith.com

Consent

You understand by clicking on the "Continue" button below, you are providing "written instructions" to LegalPRO Systems, Inc. to obtain your credit report(s) from any consumer reporting agency on a recurring basis to display to you and use the information for bankruptcy proceedings (e.g. petition preparation, post-discharge credit monitoring, etc.). I understand that I may withdraw my authorization at any time by contacting LegalPRO Systems, Inc.

[TERMS & CONDITIONS](#) [PRIVACY POLICY](#)

[Continue](#) [Cancel](#)

7. The debtor will need to successfully complete the authentication questions which will complete the process and show them their credit report and scores.

The screenshot shows a dialog box titled "Complete Authentication Questions" with a close button (X) in the top right corner. The dialog contains the following text and options:

Verify Your Identity
Please select the correct answers to these questions so we can verify your identity

1. Which of the following institutions do you have a bank account with? If there is not a matched bank name, please select 'NONE OF THE ABOVE':

- 21ST CENTURY BANK
- BARNETT CAPITAL BANK
- NONE OF THE ABOVE/DOES NOT APPLY
- BANK OF THE WEST
- HONOR BANK

2. You may have opened an auto loan or auto lease in or around July 2021. Please select the dollar amount range in which your monthly auto loan or lease payment falls. If you have not had an auto loan or lease with any of these amount ranges now or in the past, please select 'NONE OF THE ABOVE/DOES NOT APPLY':

- \$150 - \$199
- \$250 - \$299
- NONE OF THE ABOVE/DOES NOT APPLY
- \$200 - \$249
- \$300 - \$349

3. You may have opened a mortgage loan in or around June 2022. Please select the dollar amount range in which your monthly mortgage payment falls. Refer only to the regular monthly payment which includes principal, interest, and escrow (escrow could include taxes and insurance if collected by lender). If you have not had a mortgage payment now or in the past, please select 'NONE OF THE ABOVE/DOES NOT APPLY':

- \$350 - \$389
- \$750 - \$889
- NONE OF THE ABOVE/DOES NOT APPLY
- \$550 - \$789
- \$950 - \$1189

At the bottom left of the dialog is a "Cancel" button.

8. The law firm will then receive an emailed notification that the debtor has completed the process and the report is available for import. Within the case go to Tools – Main Street Vendors – then click on the Import Credit Report Data button.

The screenshot shows the Jubilee software interface. The top navigation bar includes "New", "View", "Contacts", "Cases", "Calendar", "Notice Manager", "Help", and a user profile "Hello, Bobby!". The main content area is titled "Main Street Vendors Due Diligence Products" and has tabs for "View Existing Orders", "Place New Order", and "Import Order". Below the tabs is a table of "Vendor Orders":

Item Id	Product	Status
JUBILEE CREDIT VIEW		PLACED ON: 6/14/2021
CREDAOSSREPORTSCORE	Donald Blair	Order Complete

A red circle highlights the "Import Credit Report Data" button in the "Order Complete" row, with a red arrow pointing to it. Below the table is a "view credit report.pdf" button. The bottom right corner of the interface shows "TOTAL ORDERS PLACED: 1".

9. From the import screen, select the creditors you would like to transfer to the schedules and select Import at the bottom. Click here to import the creditors and view the PDF of the credit report.

The screenshot shows the Jubilee Pro software interface. The top navigation bar includes 'New', 'View', 'Contacts', 'Cases', 'Calendar', and 'Notice Manager'. The user is logged in as 'Bobby'. The main header indicates the case is 'Blair, Donald' and the court is 'Western District of Texas - San Antonio Division'. The current screen is titled 'Credit Report Import from Jubilee Credit View'. A sidebar on the left contains navigation menus for 'BUILD' (Overview, Associated Parties, Petition, Means Test, Data), 'TOOLS' (Exemption Calculator, Main Street Vendors), and 'MANAGE' (Case Settings, Case Forms, Electronic Filings, Notes, Time & Billing, Court Notices, Events, Tasks, Documents, Email Messages). The main content area displays a list of creditors with the following details:

Creditor Name	Creditor Type	Priority	Amount
PNC BANK, NA	Secured	Unsecured	\$3,933.00
AMEX	Secured	Unsecured	\$6.00
BREMER BANK	Secured	Unsecured	\$6.00
FIRST USA BANK, NA	Secured	Unsecured	\$6.00
FNB OMAHA	Secured	Unsecured	\$6.00
FORD MOTOR CREDIT	Secured	Unsecured	\$6.00
US BANK/MERCHANT	Secured	Unsecured	\$6.00

At the bottom of the creditor list, there are checkboxes for 'Select All', 'Import Selected', and 'Add to Master List'. A status indicator at the bottom right shows 'Creditors Selected: 0 out of 7'.