

Overview

With our integration, Abrigo allows financial institutions to pull our multi-bureau business credit reports from within the Sageworks software to quickly and easily assess the risk of applicants.

Through Abrigo/Sageworks, the following reports are available:

- Advantage Pro
- Business Credit Report Pro
- Business Credit Report Plus

The reports are available from the Credit Analysis section of the Sageworks Credit Risk Software and are stored within the Document Library.

For more information on the Credit Analysis section: [please click here.](#)

For more information on the Document Library: [please click here.](#)

Once a report has been imported, it will be stored within the Document Library and certain important data elements from the report will be visible on the Credit Report tab of the related Business Profile.

To setup the integration within the Sageworks platform, all that is needed is a set of BCR credentials.

After receiving the credentials, an Abrigo master/supervisor user can save the credentials within the Sageworks platform, and turn on access for your other users, by going to **Third Party Connections -> Business Credit Reports.**

How It Works:

Step #1

From any Business Profile, click the **Credit Report** tab.

Step #2

You will see the Business Credit Reports section, at the bottom click **Import Credit Report**.

Step #3

Next, you will be prompted to select which **Report Type** you would like to run and the **Branch** to run it under, then click **Select**.

Step #4

The system will automatically pull in the information for the specific account you were viewing, but the information can be changed by clicking in each field.

To proceed, click **Search**.

Step #5

You will be presented with a list of companies that closely match the business you searched for. Select the closest match and click **Order**.

Step #6

Once the report is finished processing, it will be stored in your **Document Library** under the **Financial Documents -> Credit Report** folder.

To access the report, click **View and Download Credit Report!**