

How-To Guide

CUSTOMER SERVICE SEARCH TOOL

Welcome to the Customer Service Search Tool

Below is a quick guide of how to use the Customer Service Search tool. We have designed this tool to make it easy for you to dig deeper into your customer verification requests and assist in analyzing your current program's success. You can access the Customer Service Search tool from within your Control Center account, as well as integrate it with your in-house customer service platform to allow your CS teams to answer verification questions on the spot.

Accessing the Customer Service Search Tool

In order to access the Customer Service Search Tool, login in to the SheerID Control Center using your user account credentials. Contact your system admin or kirk@sheerid.com for assistance if you don't currently see the Customer Service Search tool in your account's Control Center.

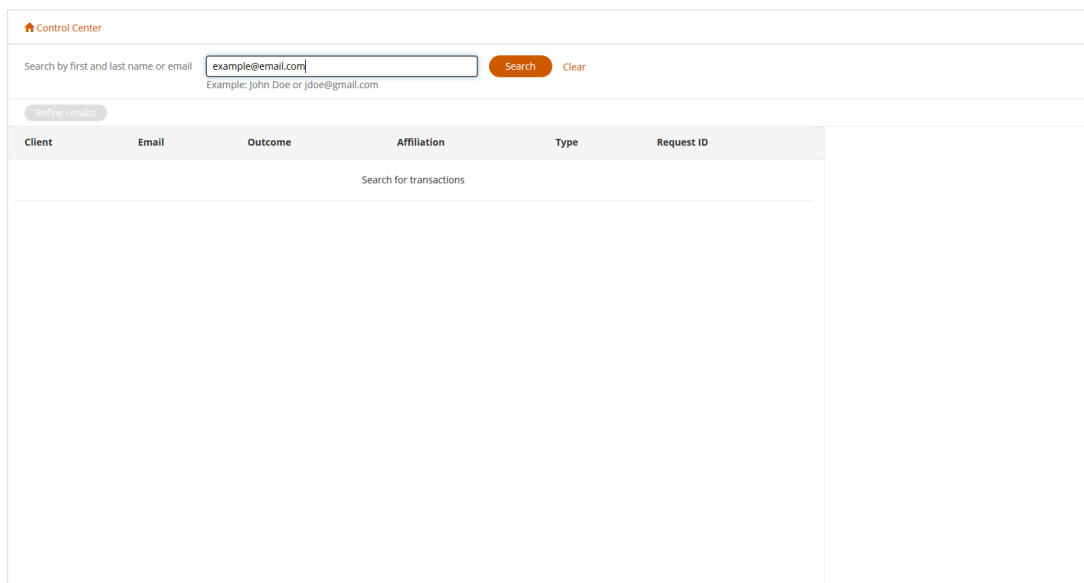
Using the Customer Service Search Tool

1. Here's a view of the tool before performing a search. You can search for a verification request by your customer's first and last name or email address.

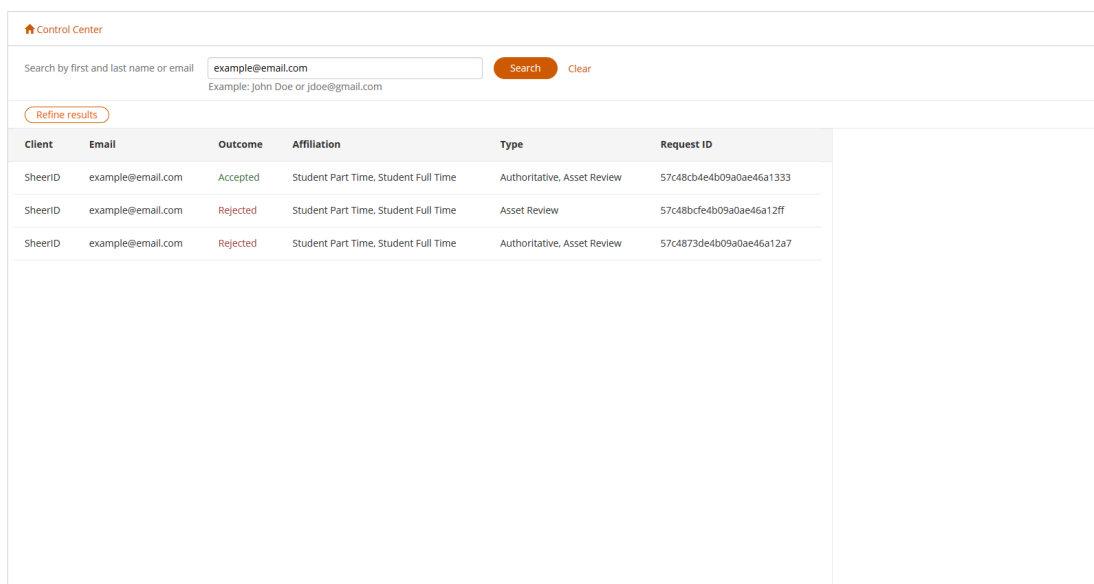
The screenshot shows the SheerID Control Center interface. At the top left, there is a home icon and the text "Control Center". Below this is a search bar with the placeholder text "Search by first and last name or email" and an example "Example: John Doe or jdoe@gmail.com". To the right of the search bar are "Search" and "Clear" buttons. Below the search bar is a "Refine results" button. The main content area is a table with the following columns: Client, Email, Outcome, Affiliation, Type, and Request ID. The table is currently empty, with the text "Search for transactions" centered in the first row.

Client	Email	Outcome	Affiliation	Type	Request ID
Search for transactions					

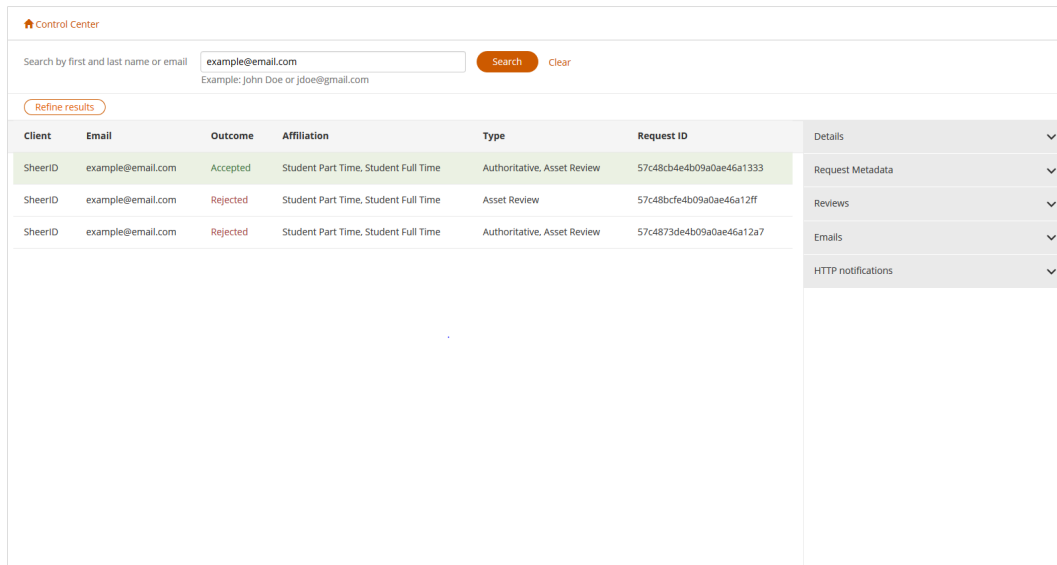
2. Enter your customer’s first and last name or email in the search field, and click the “search” button. (hint: if you enter an invalid format, you’ll get an error message notifying you about the invalid search.)



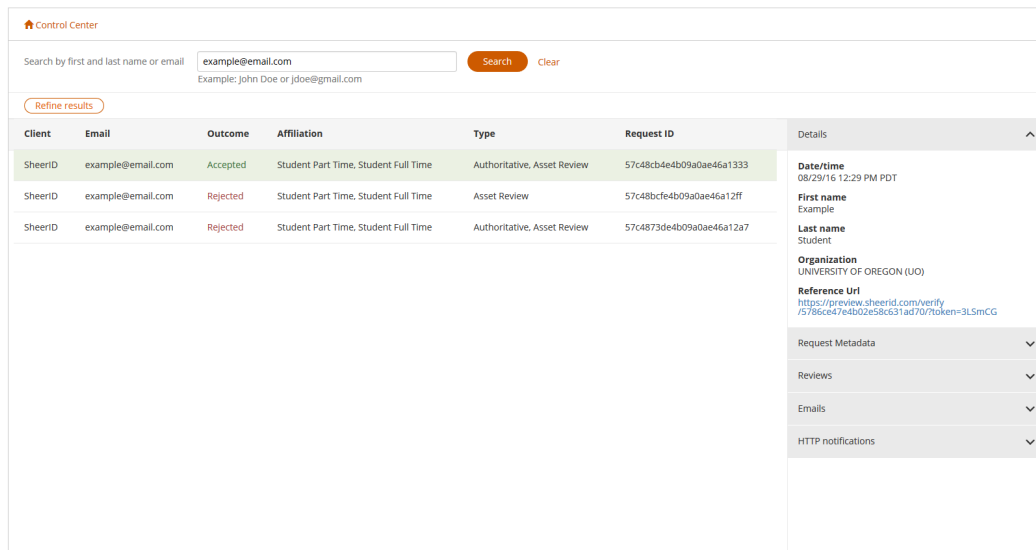
3. The verification request(s) for that customer will appear. If there are multiple requests for the name or email address, they will be displayed in order of most recent to oldest request. From this view, you can determine the outcome of the request, the affiliation type, the type of verification that was performed, and the Request ID.



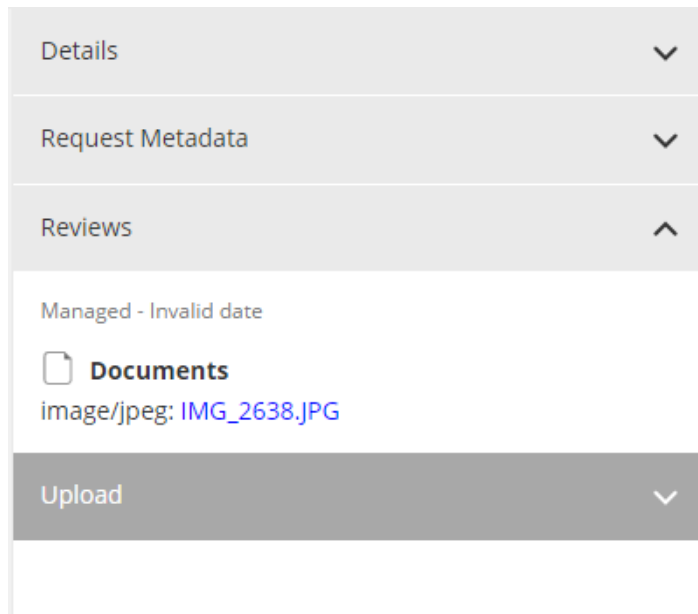
- For more information about a particular request, simply click on that record. On the right hand side an accordion view of more options will appear. This includes customer details, configured metadata, review details, emails sent, HTTP notifications, and an upload option.



- Here is a view from clicking on the “Details” tab for a selected request. This tab will provide you with the basics such as the customer’s first and last name, the date and time of the request, and organization (if applicable).



- Here is a view from clicking on the “Reviews” tab for a selected request. This tab will provide you with a list of document reviews performed. If a document has been retained according to the client-specific document retention policy, a link will be available to view the document.



- To end your search, or begin a new one, simply click on the “Clear” icon. It’s to the right of the “Search” button.

Thank You

If you need any further assistance don’t hesitate to reach out to Kirk Dutton at kirk@sheerid.com. Thank you for choosing SheerID.

The SheerID Customer Success Team