



Glossary

Term		Definition
Dashboard		
Pre-selected leads (Approved pre-selected leads)		Number of pre-selected or pre-approved leads ever since records started with Pulse
Customers (Number of customers)		Number of customers who opened a TRIVER facility
Activated Customers (Number of Customers who Activated)		Number of customers who had their first invoice advanced
<i>Please note: Supervisors will see the total activity for the entire Introducer</i>		
Submit a Lead		
Company registered name		Companies House Registered name of the business
Companies House registration number (CRN)		Companies House registration number for the business
Annual turnover (last 12 months)		Last 12 months rolling annual turnover for the business
Leads & applicants page		
Company Name		Companies House Registered name of the business
Company Reg		Companies House registration number for the business
PS Decision	Pre-Approved Offer	95%+ chance a customer will be approved and get the exact same price and limit at the application step
	Pre-Selected Offer	~70% chance a customer will be approved and receive the same limit at the application step. This is an indicative offer
	Rejected	We can't extend an offer to this customer
Lead Status	Open	The business has been pre-selected and qualifies for a facility with TRIVER, but has not started to apply on TRIVER platform

	Introduced	The business has started an application using your application link, and has been successfully attributed to you (the Introducer)
	Won	The business has successfully opened a facility with TRIVER and they are now a customer
	Rejected	The business has been rejected either at pre-selection or at application stage
	Lost	The business has been introduced by another Introducer. This means the business has started an application but has been attributed to another Introducer
Application Status	Unregistered	The business has not yet applied
	Bank Connection	The business has started their application, and they are at the Open Banking stage where they are required to connect their primary business bank account
	Manual Underwriting	We were not able to make an instant decision and the business has been referred to manual underwriting. We aim to make a decision within 24 hours and will communicate with the customer throughout the process
	Rejected	The application has been rejected at application stage, and we are unable to provide a facility to the business
	Offer Received	The business has been approved with a firm offer and needs to accept the offer to continue with the account opening process
	DD Setup	The business needs to set up a direct debit instruction for future repayments
	Key Parties	The business needs to provide personal details for the listed directors/shareholders which include full name, residential address, and date of birth
	Manual AML Checks	We have not been able to electronically verify the key parties and the application has been referred to us for manual review. At this stage, we may request proof of identity and proof of address from the relevant parties
	ID Upload	The applying director is required to upload a valid form of identification which includes passport or UK driving licence
	Account Open	The business has successfully opened their account with us and the facility is live

Follow up status		To be used by the Introducer. The toggle should be used to inform TRIVER if the business has declared that they are not interested in the TRIVER offer and will not proceed to apply or complete a pending application
PS Turnover		The turnover input for the business submitted to preselection
PS Offer URL		The offer and application URL to be shared with the business to apply for a facility with TRIVER
PS Facility Limit		Pre-approved or In Principle facility limit offer for the business
PS Daily Price		Pre-approved or In Principle daily price offer for the business
PS Decision date		Date when the lead was submitted to preselection
PS Offer expiry date		The pre-selected offer expiry date which is 30 days from the pre-selected decision date
Application Date		The date the business started their application with TRIVER
Agent owner		The Pulse user that submitted the lead to TRIVER
Channel	Inbound	Leads submitted by users for pre-selection
	Outbound	Leads submitted through Batch process

Customers Page

Company Name		Companies House Registered name of the business
Facility Limit		The current live facility limit for the business
Facility Account Opened Date		The date the facility was opened by the business
Activated		The business has advanced their first invoice successfully with TRIVER
Agent owner		The user that submitted the lead to TRIVER

Reports Page

Leads Submitted (graph)		Number of leads submitted to TRIVER Pulse over time
Accounts Opened (graph)		Number of accounts opened with TRIVER over time

Total Facility Limits Opened (graph)	Total of all facility limits from the number of accounts opened
Month	Calendar month for which the data applies
Leads Submitted	Number of leads submitted in the month
Leads Pre-Selected	Number of leads that were approved in the month
% Leads Pre-Selected	Percentage of leads that were approved in the month
Leads Applied	Number of leads that applied for a TRIVER facility within the month
Accounts Opened	Number of accounts opened during the month
Accounts Activated	Number of accounts that were activated during the month
Total Limit Opened	The total figure of all facilities opened during the month