creditsafe

HOW TO ADD COMPANIES TO RISK TRACKER

Adding Companies to Risk Tracker

When using the Creditsafe Risk tracker there are several ways that you can add companies to your portfolios, these are:

Manually
– When viewing a company report clicking the **'Follow'** button in the top-right hand corner of the screen will open a box allowing you to choose a portfolio to which this company will be added from the drop-down available.
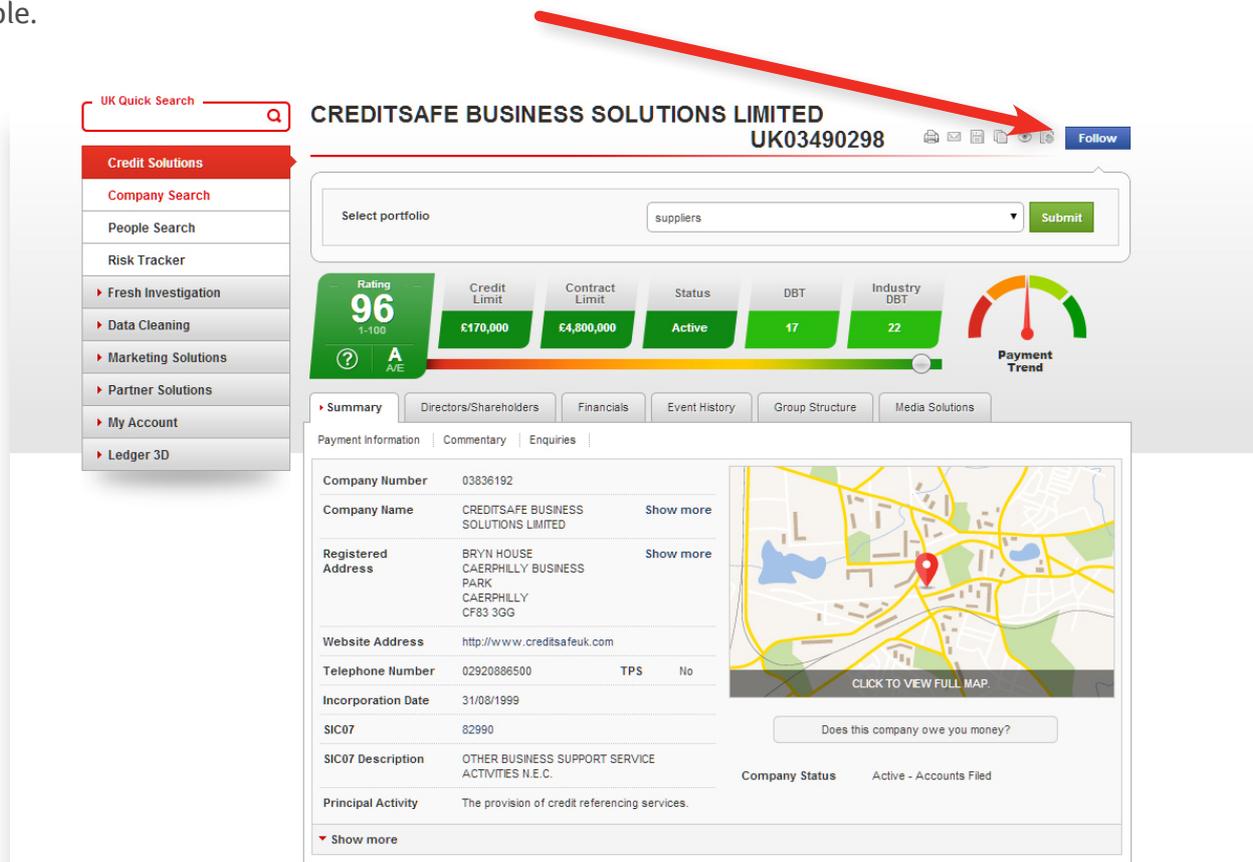
You can also use the **'Add Free Text'** box to assign a reference to this company within the Risk Tracker portfolios.

Once added the button will turn green and the text changed to state **'Following'**
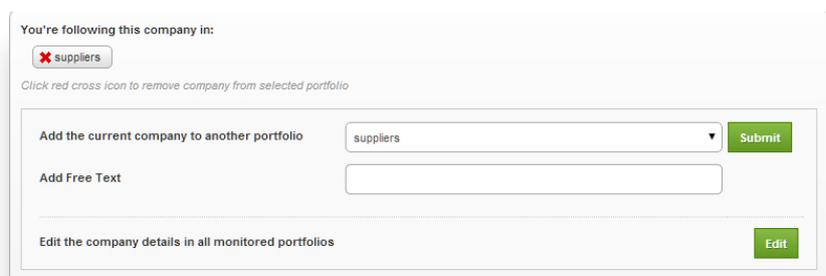
Automatically

— If you want us to automatically monitor all reports you view it can be managed within the Risk Tracker product itself. Entering Risk Tracker and selecting the **'My Portfolios'** tab will open a page with an options toward the bottom.


If set to **"Automatically add…"** then the blue 'Follow' button will now be a green **'Following'** button as the company has been added to your default portfolio.

Bulk

– If you have a file or list of companies you would like to upload into the product this can be done by selecting the **'Import/Export'** tab from within the Risk Tracker.*

The first step is to choose the portfolio to which the companies will be uploaded.
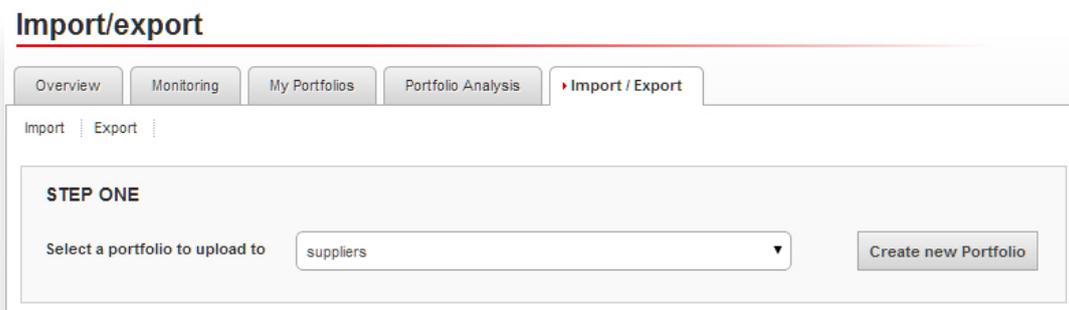

Then you have two choices:

Option 1

– Manually entering company numbers or names into the box provided, only one record per line.
If you type a , after the company name/number you can then type a reference alongside which will be added as a **'Free text'** when uploaded.
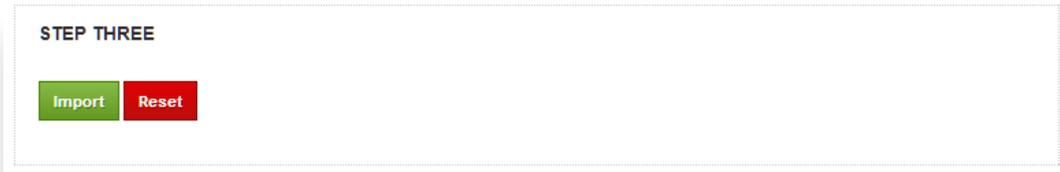
Or

Option 2

– Uploading a .csv file with company numbers listed in Column A of the file and anything you would like appended to the **'Free text'** alongside the records in Column B.
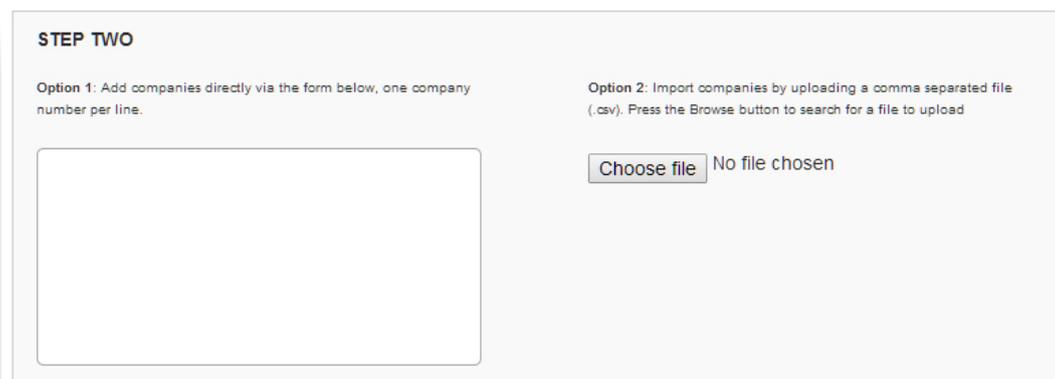
Once satisfied simply hit the **'Import'** button and we will try to match the submitted data to records on our database. All matched records will be added to the pre-selected portfolio.

*Please note this method is completely dependent on the accuracy of the data you submit, if you would like us to try to improve your records please contact us on 02920 856 500 and ask your account manager about our Data cleaning service.