



# HOW TO ADD COMPANIES TO RISK TRACKER

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# creditsafe~

# 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.

Credit Solutions				011004007			
Company Search							
People Search	Select portfolio		suppliers		▼ Submit		
Risk Tracker							
Fresh Investigation	Rating -	Credit Contract Limit Limit	Status	DBT	Industry DBT		
Data Cleaning	1-100	£170,000 £4,800,000	Active	17	22		
Marketing Solutions	? A			<u> </u>	Payment		
Partner Solutions							
My Account	• summary Direc	tors/Snarenoiders Financiais	EVent Histo	Group Structure	e Media Solutions		
Ledger 3D	Payment Information (	Payment Information Commentary Enquiries					
	Company Number	03836192					
	Company Name	CREDITSAFE BUSINESS SOLUTIONS LIMITED	Show more				
	Registered Address	BRYN HOUSE CAERPHILLY BUSINESS PARK CAERPHILLY CF83 3GG	Show more		2		
	Website Address	http://www.creditsafeuk.com					
	Telephone Number	02920886500 TF	S No		CLICK TO VIEW FULL MAP.		
	Incorporation Date	31/08/1999					
	SIC07	82990		Does	this company owe you money?		
	SIC07 Description	OTHER BUSINESS SUPPORT SER ACTIVITIES N.E.C.	VICE	Company Status	Active - Accounts Filed		

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'** 



k red cross icon to remove company from selected po	tfolio	
Add the current company to another portfolio	suppliers	▼ Submit
Add Free Text		
Edit the company details in all monitored portfoli	DS	Edi

#### 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.

	A My portfo	lios				
Credit Solutions	Overview	Monitoring My P	Portfolios Portfolio A	nalysis Import / Ex	port	
Company Search	Portfolio Overview	Create new Portfoli	io			
People Search	View your	portfolio setting page for	r advance settings.			
Risk Tracker	Removes th	ne portfolio and all compa	anies within it.			
Fresh Investigation	View and e	dit companies in a portfo	olio.			
Data Cleaning	Leave Payl	nent Experience.				
Marketing Solutions		Portfolio	Companies	Settings Changed	Email Addresses	Filter
Partner Solutions	2 2 2	NonLtd	0	22-Jul-14	No email addresses	Default filter
My Account		aucoliara	1	22 Jul 14		Default filter
Ledger 3D		suppliers		22-JUI-14	alex.meek@creditsafeuk.com	
	12 2 2	competitors	0	22-Jul-14	alex.meek@creditsafeuk.com	Default filter
	12 2 2	customers 1	0	22-Jul-14	alex.meek@creditsafeuk.com	Default filter
		customers 2	0	22-Jul-14	alex.meek@creditsafeuk.com	Default filter
		customers 3	0	22-Jul-14	alex.meek@creditsafeuk.com	Default filter
	If Auto RiskTra	cker is active, the first tin	ne you view a company's C o my risk tracker	reditsafe report, Auto Ris	Tracker will ask you which portfolio : ompanies to risk tracker myself	to add it to

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.

Verview	Monitoring	My Portfolios	Portfolio Analysis	Import / Export	
ort Exp	ort				
STEP OF	NE				

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.

Option 1: Add companies directly via the form below, one company	Option 2: Import companies by uploading a comma separated file
number per line.	(.csv). Press the Browse button to search for a file to upload
	Choose file No file chosen

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.

STEP THREE			
Import Reset			

\*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.