



HOW TO MONITOR COMPANIES USING 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.

The screenshot shows the Creditsafe Business Solutions Limited report page. The company name is CREDITSAFE BUSINESS SOLUTIONS LIMITED with UK03490298. The page includes a sidebar with navigation options like Credit Solutions, Company Search, People Search, Risk Tracker, and various investigation tools. The main content area displays company details such as Rating (96), Credit Limit (£170,000), Contract Limit (£4,800,000), Status (Active), DBT (17), and Industry DBT (22). A 'Follow' button is located in the top right corner. Below the company details, there is a section for 'Add Free Text' and a 'Submit' button.

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 will change to state **‘Following’**

Following

You're following this company in:

☒ suppliers

Click red cross icon to remove company from selected portfolio

Add the current company to another portfolio:

Add Free Text:

Edit the company details in all monitored portfolios

Automatically

– If you want Risk Tracker to automatically monitor all reports you view it can be managed within the product itself. Accessing Risk Tracker through the main menu and selecting the ‘**My Portfolios**’ tab will open a page with an option at the bottom of the page to automatically add companies to Risk tracker.

UK Quick Search

My portfolios

Overview Monitoring **My Portfolios** Portfolio Analysis Import / Export

Portfolio Overview | Create new Portfolio

- View your portfolio setting page for advance settings.
- Removes the portfolio and all companies within it.
- View and edit companies in a portfolio.
- Leave Payment Experience.

Portfolio	Companies	Settings Changed	Email Addresses	Filter
NonLtd	0	22-Jul-14	No email addresses	Default filter
suppliers	1	22-Jul-14	alex.meek@creditsafeuk.com	Default filter
competitors	0	22-Jul-14	alex.meek@creditsafeuk.com	Default filter
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 RiskTracker is active, the first time you view a company's Creditsafe report, Auto RiskTracker will ask you which portfolio to add it to

☒ automatically add companies to my risk tracker ☐ I will add companies to risk tracker myself

save

If set to “**Automatically add...**” then the blue ‘Follow’ button on all company report pages will now be a green ‘**Following**’ button as the company will have automatically been added to your default portfolio.

Following

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.

Import/export

Overview Monitoring My Portfolios Portfolio Analysis **Import / Export**

Import | Export

STEP ONE

Select a portfolio to upload to suppliers Create new Portfolio

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.

Please note: This only works for limited company numbers, and non-limited records need to be manually added

STEP TWO

Option 1: Add companies directly via the form below, one company number per line.

Option 2: Import companies by uploading a comma separated file (.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

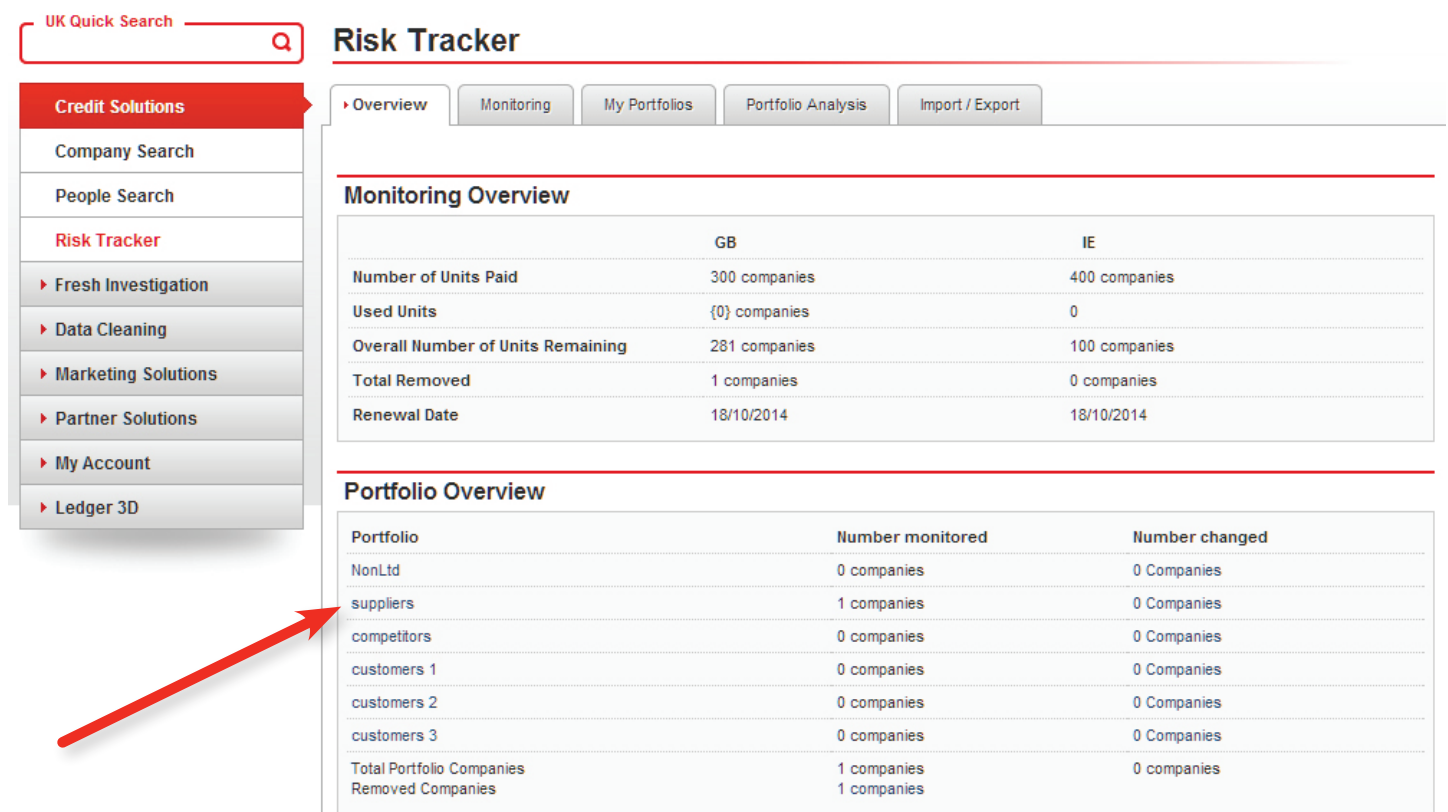
Import **Reset**

*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.

How to view & export changes within your Risk Tracker portfolio

The first step to viewing changes within your portfolio is to simply visit risk tracker from the left menu.

Select your chosen portfolio



UK Quick Search

Risk Tracker

Overview Monitoring My Portfolios Portfolio Analysis Import / Export

Monitoring Overview

	GB	IE
Number of Units Paid	300 companies	400 companies
Used Units	{0} companies	0
Overall Number of Units Remaining	281 companies	100 companies
Total Removed	1 companies	0 companies
Renewal Date	18/10/2014	18/10/2014

Portfolio Overview

Portfolio	Number monitored	Number changed
NonLtd	0 companies	0 Companies
suppliers	1 companies	0 Companies
competitors	0 companies	0 Companies
customers 1	0 companies	0 Companies
customers 2	0 companies	0 Companies
customers 3	0 companies	0 Companies
Total Portfolio Companies	1 companies	0 companies
Removed Companies	1 companies	

Tick show only changed companies & your chosen time frame. Click on search

Choose Portfolio

suppliers

▼

Change Since

2 Weeks

▼

☒ Show only changed Companies

☐ Show result according to selected e-mail filter

Companies Per Page

50

▼

This will return a list of companies that have had a 'change' within the selected time frame. The changes will be highlighted with a red astrix.

	Name	Company #	Last changed	Annual Accounts	Limit	Rating	CCJs / CJs	Writs	Others	Portfolio	Free text	Non Ltd?
	ASKEY LIMITED	03284178	15/08/2014	11/12 - 12/11	*500	*44	0	0	*Annual Returns *Event/Status History	suppliers		N
	OSPREY LIMITED	00628763	13/08/2014	*12/11 - 13/11	*120000	*93	0	0	-	suppliers		N

In order to export these changes, select Import / Export from the top menu

Import/export

Overview

Monitoring

My Portfolios

Portfolio Analysis

► Import / Export

Choose Export from the top left of the page

Import/export

Overview

Monitoring

My Portfolios

Portfolio Analysis

► Import / Export

Import

Export

Risk Tracker Import/Export

Overview | Monitoring | My Portfolios | Portfolio Analysis | **Import / Export**

Import | Export

NEW OR SAVED TEMPLATE

Choose a previous saved template or choose 'New export'

New export

INFORMATION TO EXPORT

Choose portfolios to export (hold Ctrl to select more than one)

NonLtd
suppliers
competitors
customers 1
customers 2
customers 3

CHOOSE COMPANY TO EXPORT

☒ All monitored companies ☐ Changed companies

Last e-mail date

CHOOSE PARAMETERS TO EXPORT

☐ Select / Deselect All

☒ Company number (Mandatory Field) ☐ Company name ☐ Free Text

☐ Rating ☐ Rating Text ☐ Limit

☐ CCJ ☐ Writs ☐ Limit of CCJ

☐ No of Employees ☐ Last change date ☐ Address

☐ Postcode ☐ Telephone number ☐ Senior Executive (Non Ltd)

FILE FORMAT AND E-MAIL ADDRESS

File format .xls E-mail address

SAVE AND UPDATE OPTIONS

☐ Save as new template (enter template name) ☒ Do not save ☐ Update chosen template

Export

Follow these simple steps:

» Choose a previous saved template or choose 'New export'

» Choose portfolios to export

» Choose company to export

» Choose parameters to export

» File format- your data can be exported in .xls, .csv, .sdv

» Input the email address that you wish to receive the data

» Save and update options

» Select export and your data shall be emailed to you shortly