HOW TO MONITOR COMPANIES USING RISK TRACKER

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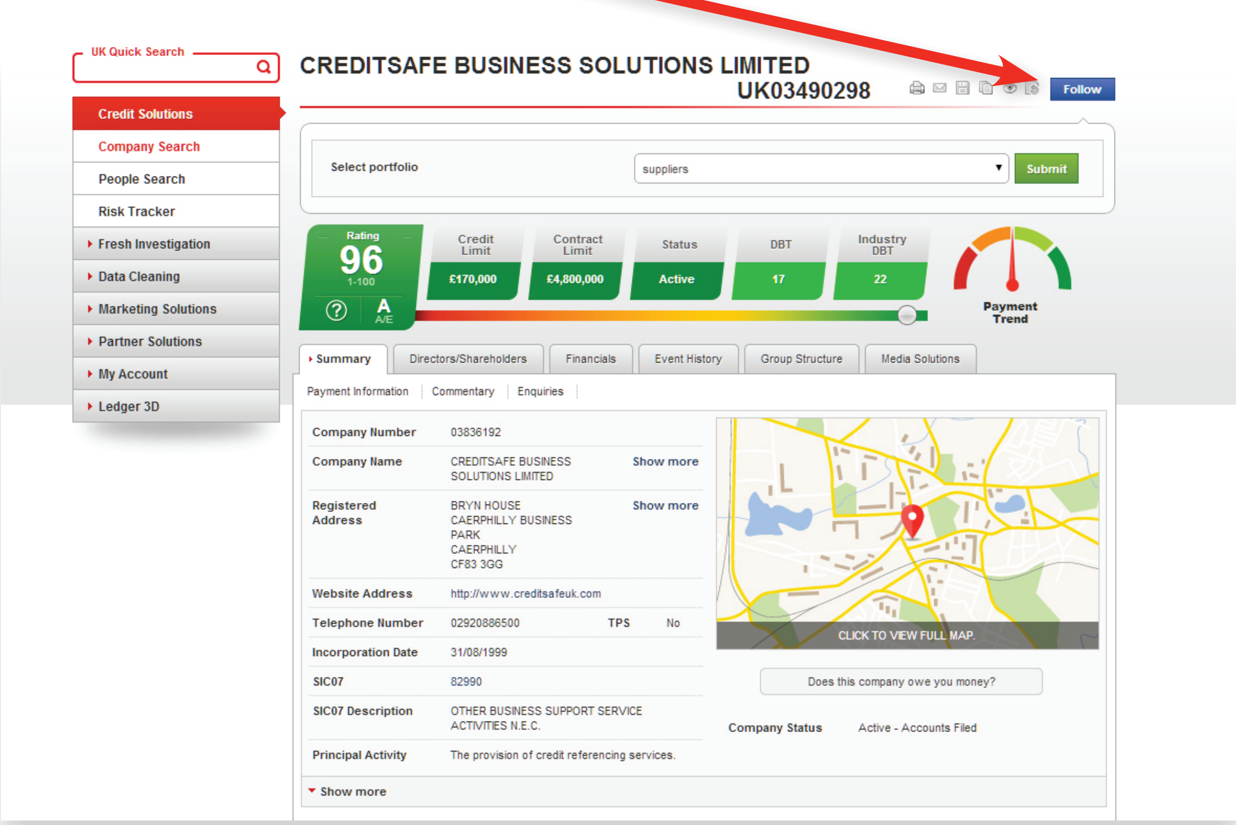
Adding Companies to Risk Tracker

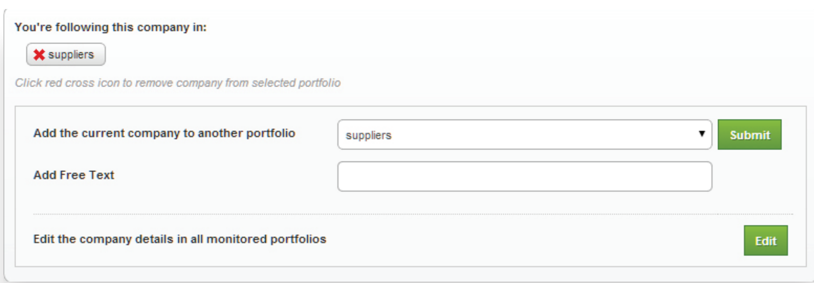
When using the Creditsafe Risk tracker there are several ways that you can add companies to your portfolios, these are:

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.



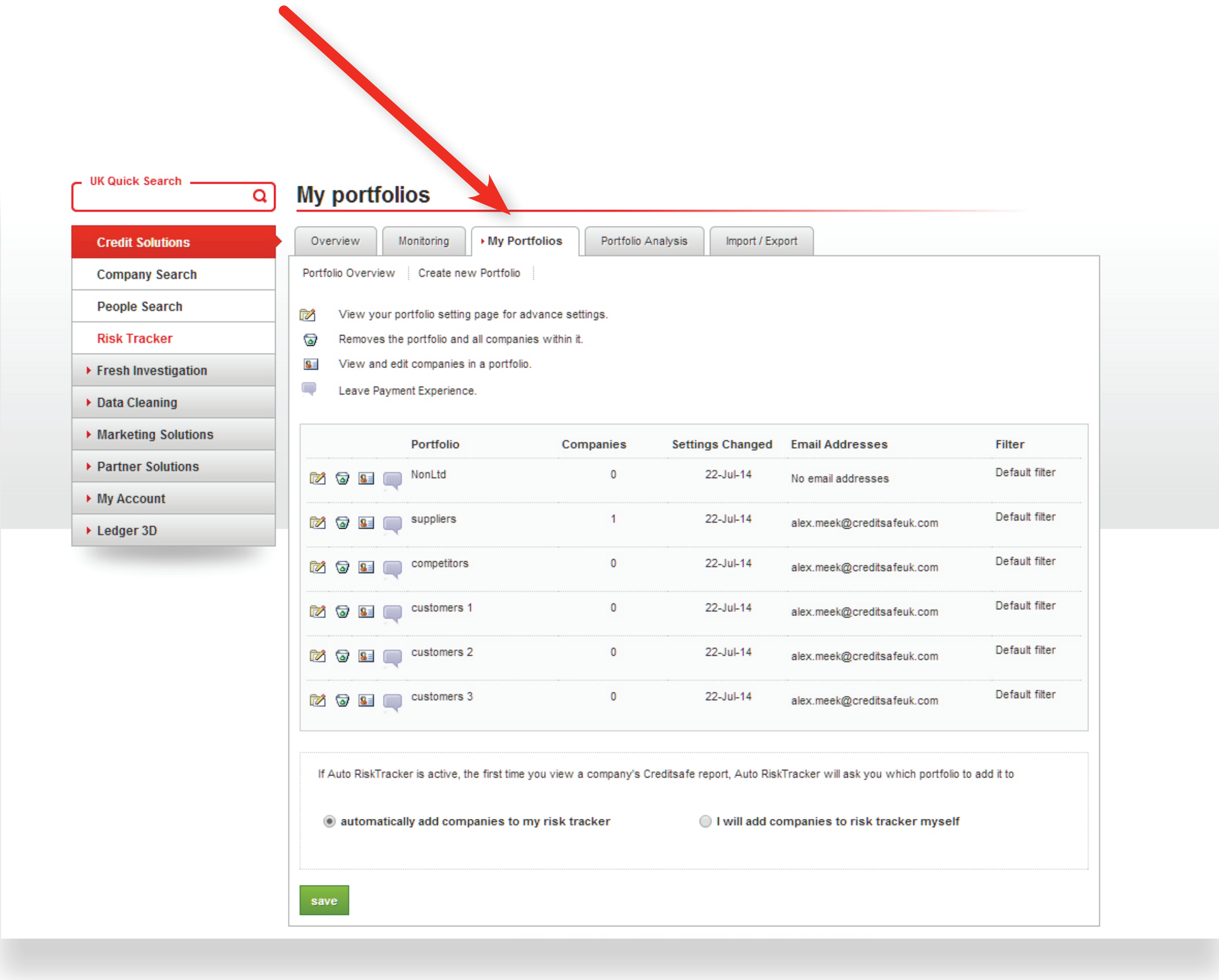
You can also use the **'Add Free Text'** box to assign a reference to this company within the Risk Tracker portfolios.



Once added, the button will turn green and the text will change to state **'Following'**

Automatically

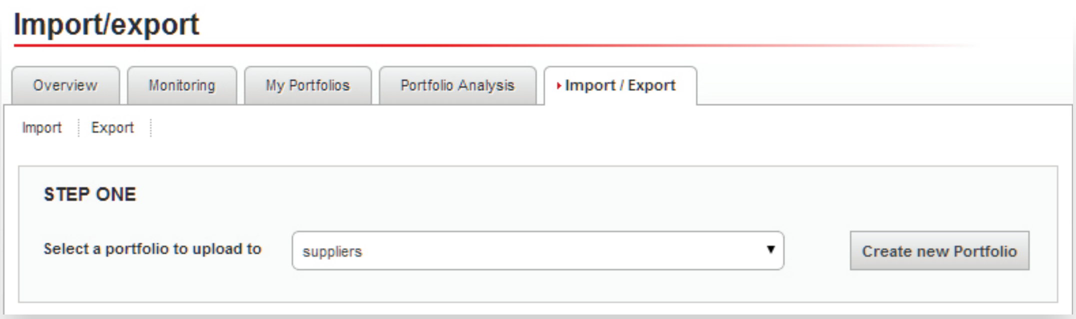
– If you want Risk Tracker to automatically monitor all reports you view it can be managed within the product itself. Accessing Risk Tracker through the main menu and selecting the **'My Portfolios'** tab will open a page with an option at the bottom of the page to automatically add companies to Risk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



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.

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.



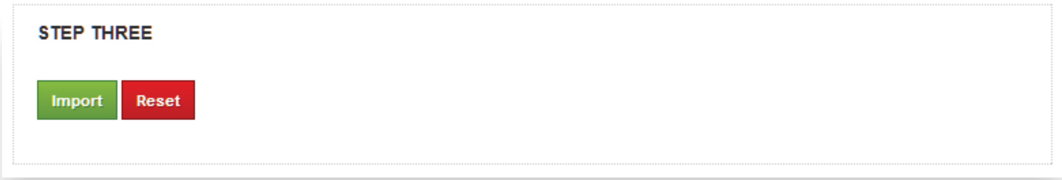
Then you have two choices:

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

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.

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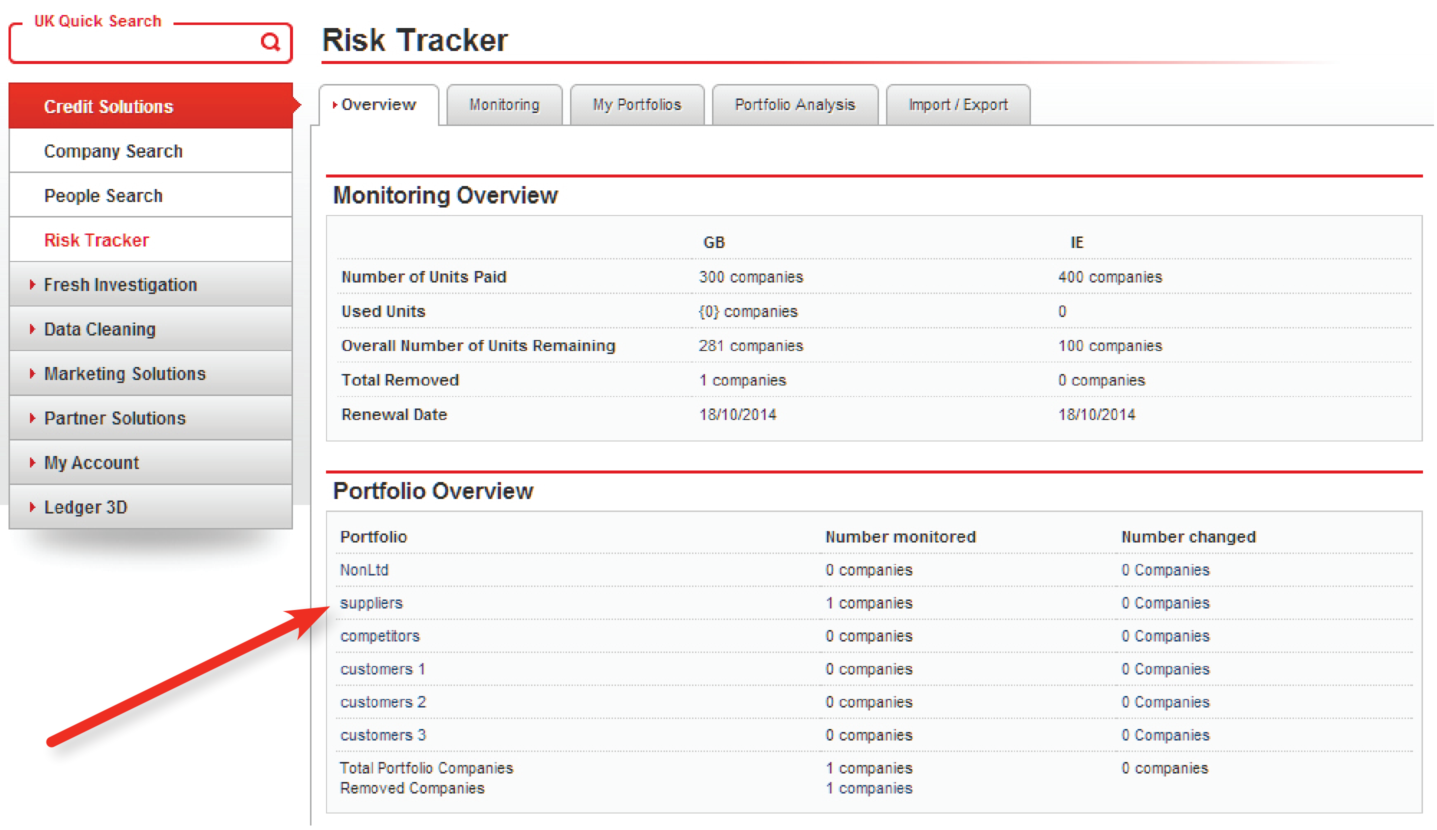
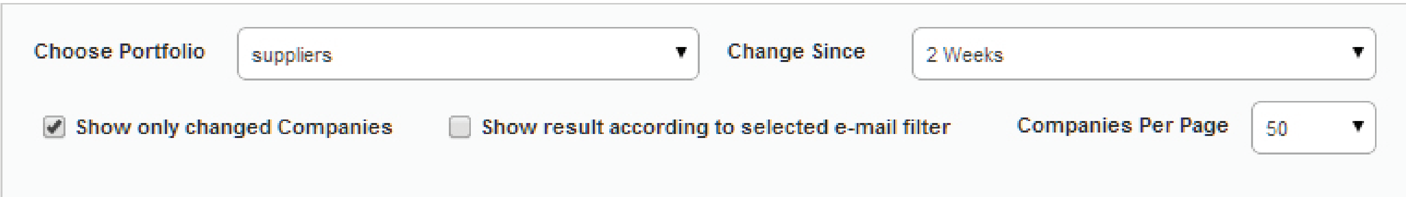
How to view & export changes within your Risk Tracker portfolio

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

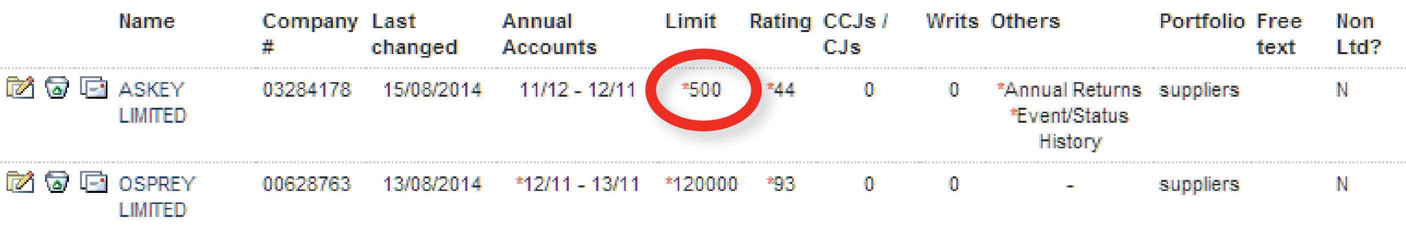
Select your chosen portfolio



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

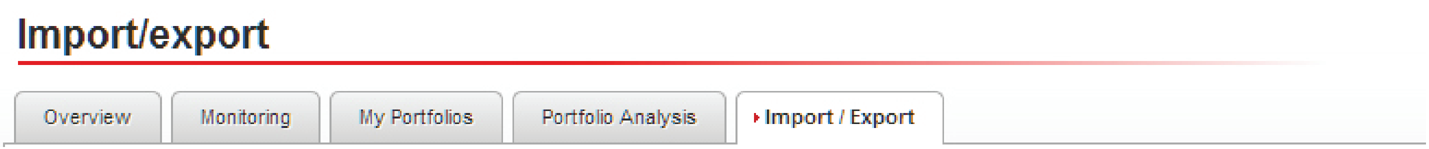


This will return a list of companies that have had a 'change' within the selected time frame. The changes will be highlighted with a red astrix.

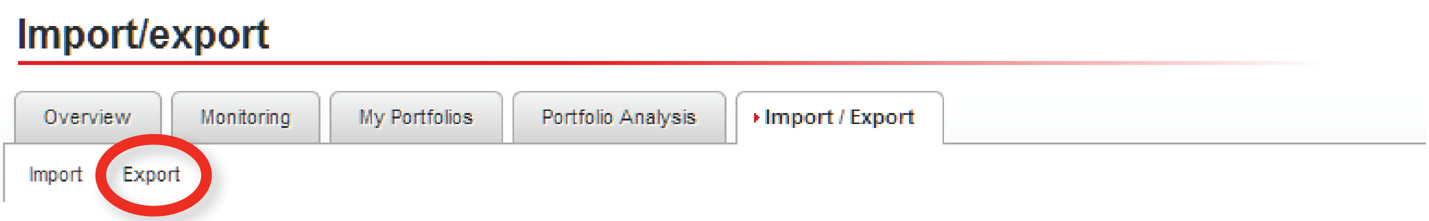


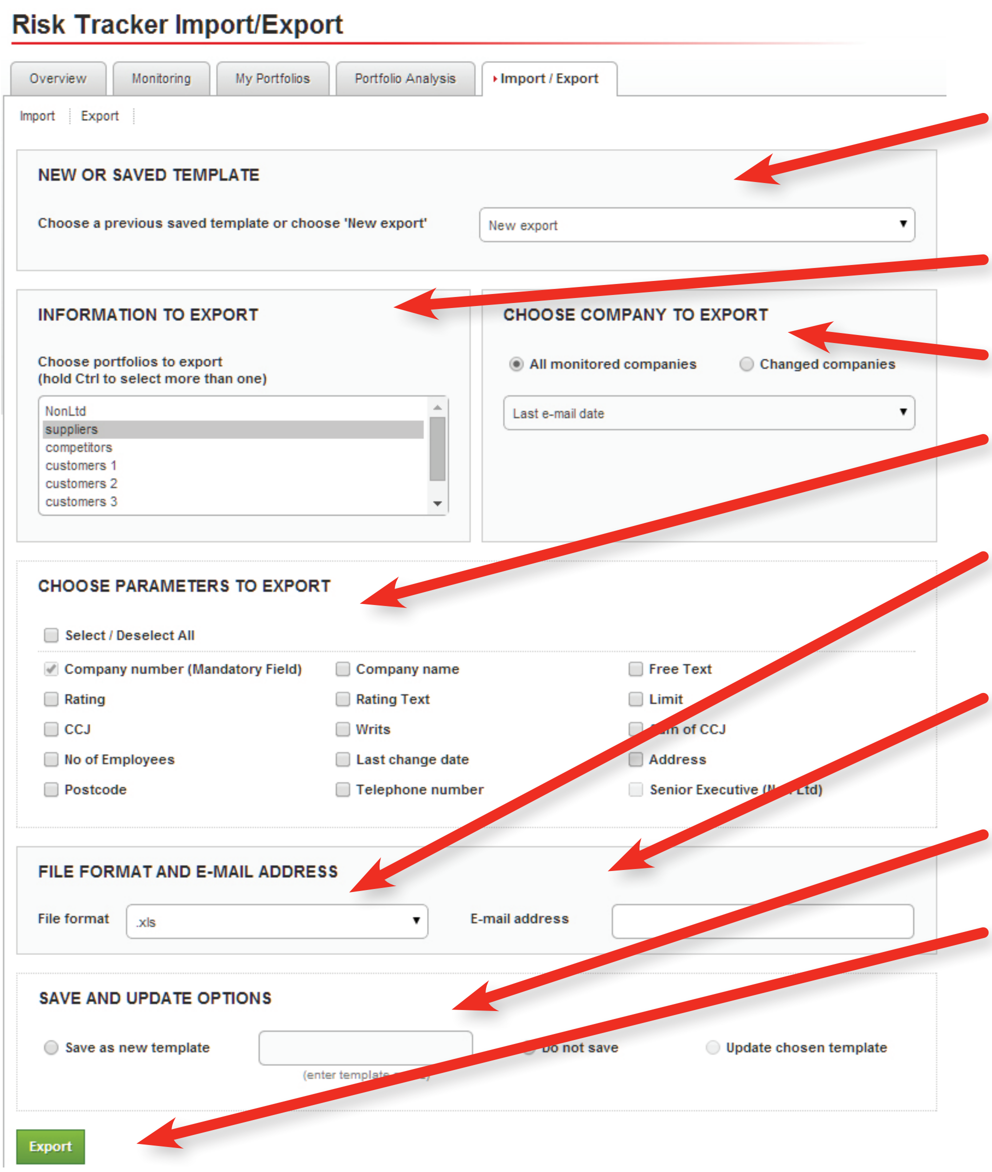
Name	Company #	Last changed	Annual Accounts	Limit	Rating	CCJs / CJs	Writs	Others	Portfolio	Free text	Non Ltd?
ASKEY LIMITED	03284178	15/08/2014	11/12 - 12/11	*500	*44	0	0	*Annual Returns *Event/Status History	suppliers		N
OSPREY LIMITED	00628763	13/08/2014	*12/11 - 13/11	*120000	*93	0	0	-	suppliers	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

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



Choose Export from the top left of the page





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