

The logo for RedFlagAlert, featuring a small red square to the left of the text. "RedFlag" is in white and "Alert" is in red.

RedFlagAlert

Dynamics App

Portfolio Manager - Integration

Version 1.01a

14th September 2025

Introduction

This guide explains how to integrate the **Red Flag Alert (RFA) Portfolio Manager** with **Dynamics CRM**, enabling your sales and compliance teams to monitor company risk, receive real-time alerts, and enrich account records—all without leaving Dynamics.

What is Portfolio Manager?

Red Flag Alert's **Portfolio Manager** allows you to track financial health, risk events, and changes across your customer and prospect base. You can monitor:

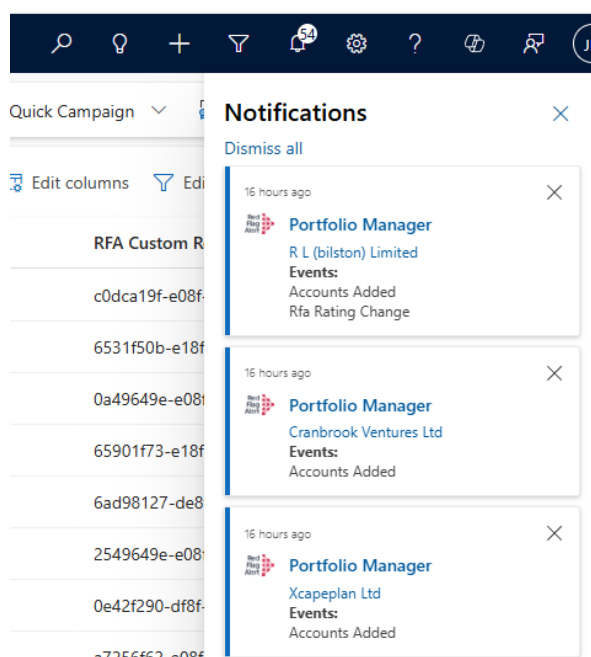
- Insolvency risk
- Credit scores
- CCJs
- Company events (e.g. PEPs, gazette notices, filings)

Impact on your Dynamics CRM

Red Flag Alert processes portfolio events **every day, 24/7**.

When a portfolio company event occurs:

- The **Red Flag Alert data** on the associated **Dynamics account record** is automatically refreshed.



App Authorisation

To enable our servers to process your portfolio events, you'll first need to **create a refresh token**.

How to set it up:

1. In the app, go to **Settings** → **Configure Accounts Refresh**.
2. Follow steps 1 – 4.

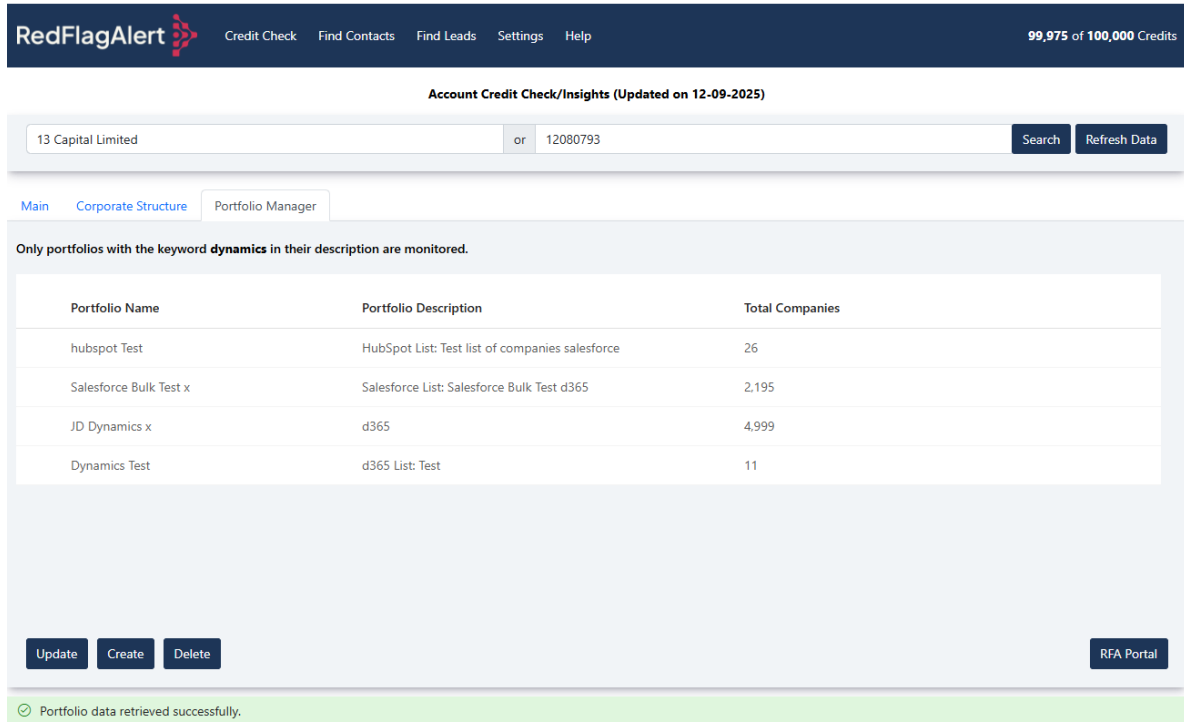
Portfolio Manager - App Authorisation

3. Enter your **Red Flag Alert (RFA)** username and password.
4. Click **Save**.

You only need to do this **once**, and note that **only one RFA account can be linked to your Microsoft Dynamics 365 CRM**.

How to Access Portfolio Manager

Open the RFA App and click the Portfolio Manager tab.



RedFlagAlert Credit Check Find Contacts Find Leads Settings Help 99,975 of 100,000 Credits

Account Credit Check/Insights (Updated on 12-09-2025)

13 Capital Limited or 12080793 Search Refresh Data

Main Corporate Structure Portfolio Manager

Only portfolios with the keyword **dynamics** in their description are monitored.

Portfolio Name	Portfolio Description	Total Companies
hubspot Test	HubSpot List: Test list of companies salesforce	26
Salesforce Bulk Test x	Salesforce List: Salesforce Bulk Test d365	2,195
JD Dynamics x	d365	4,999
Dynamics Test	d365 List: Test	11

Update Create Delete RFA Portal

Portfolio data retrieved successfully.

Button: Update

Update the highlighted portfolio.

Button: Create

Create a new portfolio.

Button: Delete

Deletes the highlighted portfolio.

Button: RFA Portal

Opens a new tab to access your Red Flag Alert portfolio portal.

Create or Update the Portfolio

Update Portfolio

Portfolio Name: Dynamics Test

Portfolio Description: d365 List: Test

Recipients: rfaapps007@gmail.com,jason@toradigital.co.uk

We leverage Dynamics views to import companies into your portfolio.

Accounts Lists: USER: All Accounts - Credit limited > 5000 (11)

Save Portfolio Add Accounts to Portfolio Close

Portfolio Description: The portfolio description must contain the word “s365”, so our servers can identify portfolios linked to your Dynamics CRM.

Recipients: Add emails, that you would like to receive event notifications.

Button: Save Portfolio

Save portfolio details.

Button: Add Accounts to Portfolio

This action will add all the companies in your Accounts List to your portfolio.