RedFlagAlert

Dynamics App

Portfolio Manager - Integration

Version 1.01a

14th September 2025

Microsoft Dynamics 365

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:

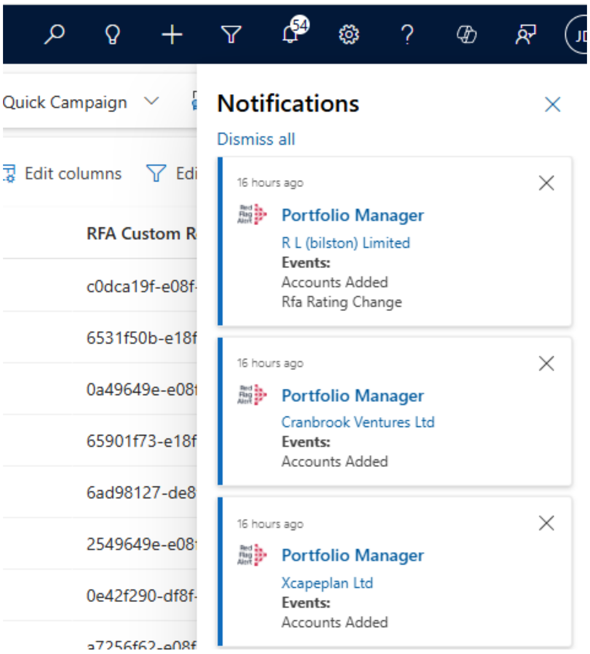
- Insolvency risk
- Credit scores
- CCJs
- Company events (e.g. PEPs, gazette notices, filings)

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.

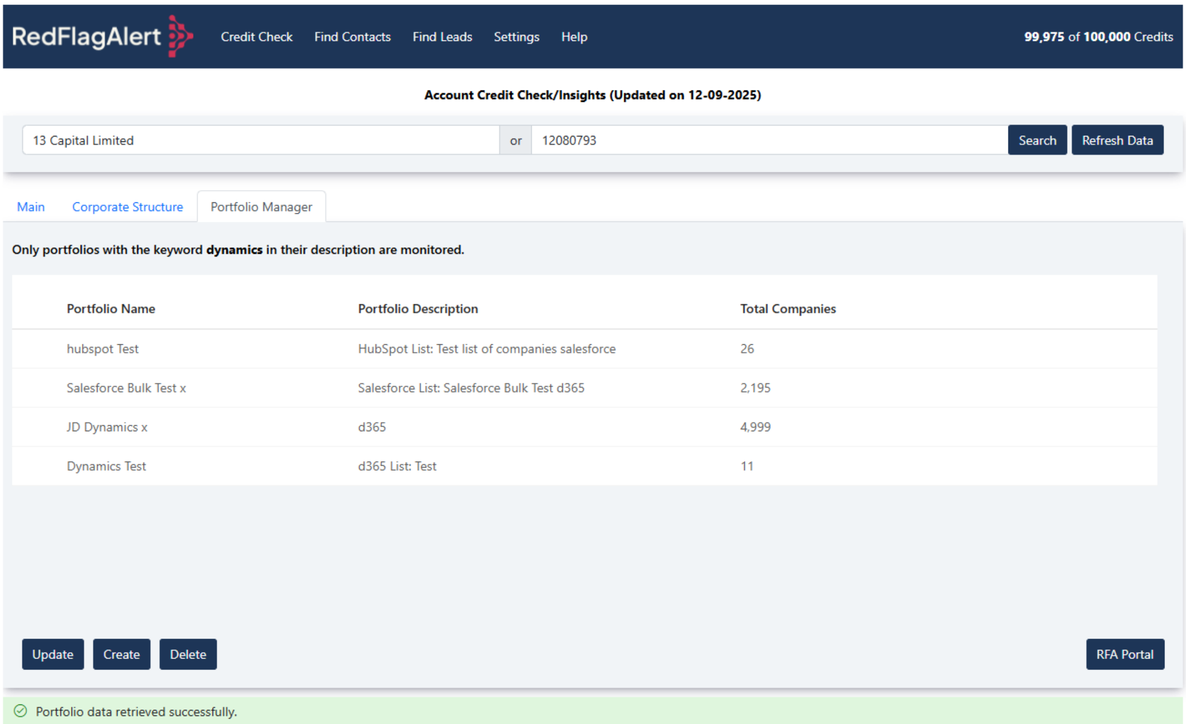
   Portfolio Manager - App Authorisation

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.



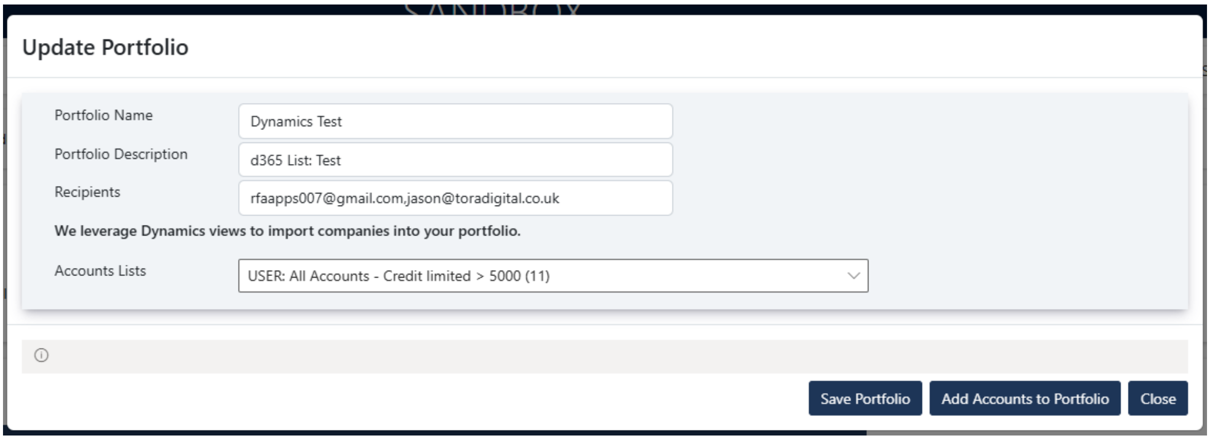
Button: Update
Update the highlighted portfolio.

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



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.