



HubSpot App

Portfolio Manager - Integration

Version 1.30a

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Introduction

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

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:

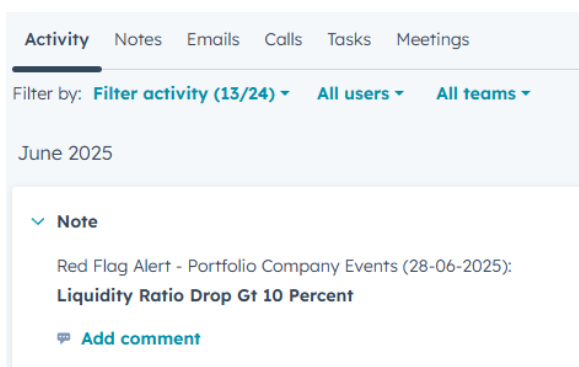
- Insolvency risk
- Credit scores
- CCJs
- Company events (e.g. PEPs, gazette notices, filings)

Impact on your HubSpot CRM

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

When a portfolio company event occurs:

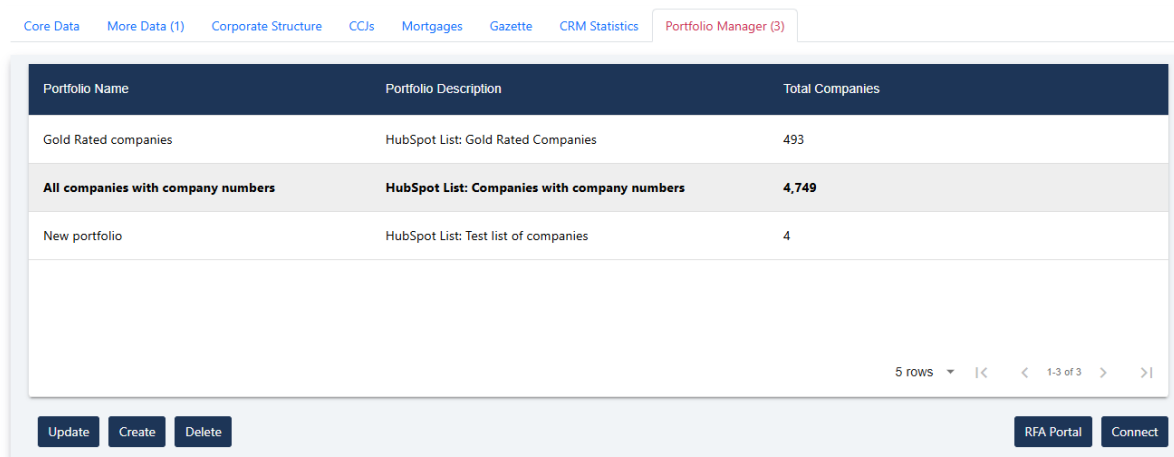
- The **Red Flag Alert data** on the associated **HubSpot company record** is automatically refreshed.
- A **company note** is created in HubSpot summarizing all relevant events affecting that company.



How to Access Portfolio Manager

Click on the “Portfolio Manager” tab.

You must first connect to Red Flag Alert portfolio manager by clicking on the “Connect” button.



Portfolio Name	Portfolio Description	Total Companies
Gold Rated companies	HubSpot List: Gold Rated Companies	493
All companies with company numbers	HubSpot List: Companies with company numbers	4,749
New portfolio	HubSpot List: Test list of companies	4

5 rows |< < 1-3 of 3 > >|

Update Create Delete RFA Portal Connect

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.

Button: Connect

Connect your Red Flag Alert account to your HubSpot CRM.

Create or Update the Portfolio

Update Portfolio: Total companies in Portfolio (4,749)

Portfolio Name: All companies with company numbers

Portfolio Description: HubSpot List: Companies with company numbers

RFA Events: ALL EVENTS x

Recipients: youremailaddress@hotmail.com

We leverage HubSpot lists to import companies into your portfolio.

Choose a HubSpot List: Companies with company numbers | COMPLETE | 4,753

Details: The selected list contains 4,753 companies to be added to your portfolio.

Save Add companies to Portfolio Close

Button: Save

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

RFA Events: Choose events you would like to monitor.

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

Button: Add companies to Portfolio

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

Button: Close

Cancel create or update portfolio details.