



### **Red Flag Alert – HubSpot APP**

Gain insider information on your prospects and clients by simply connecting your HubSpot CRM to a live Red Flag Alert database of over 6.5 million UK businesses.

Version 1.29

16<sup>th</sup> March 2025

## HOW TO INSTALL APP

Go to the HubSpot APP Marketplace and search for “red flag” install the Red Flag Alert – B2B Leads App.

OR

[CLICK HERE](#)

## RECOMMENDATION

Before utilizing the app, we strongly recommend reviewing and adjusting the custom field mappings as needed. This involves switching specific custom fields on or off in the field mapping configuration to ensure that the app aligns with your data requirements and integrates smoothly with your CRM system.

To access field mapping, open App, click Settings then Field Mapping tab.

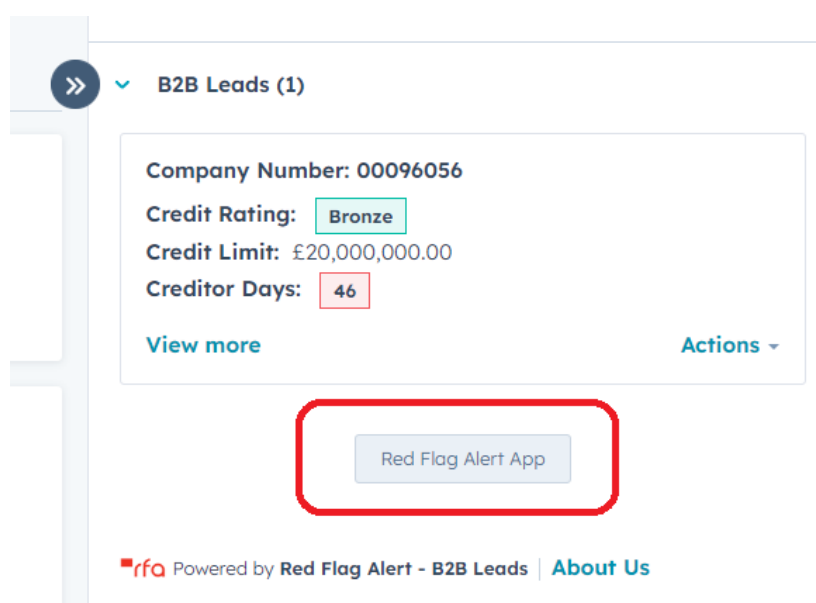
### SWITCH OFF OVERRIDING DEFAULT FIELDS

You can switch off overriding fields in Field Mapping:

- zip
- Address
- City
- Name
- Phone
- Website
- domain

## HOW TO ACCESS THE APP

To access the Red Flag Alert App for a specific company record, simply click the "Red Flag Alert App" button.



The screenshot shows a HubSpot interface for a company record. At the top, there is a navigation bar with a double arrow icon and a dropdown menu labeled "B2B Leads (1)". Below this, a card displays the following information:

- Company Number: 00096056
- Credit Rating: Bronze
- Credit Limit: £20,000,000.00
- Creditor Days: 46

At the bottom of the card, there are two links: "View more" and "Actions". Below the card, a button labeled "Red Flag Alert App" is highlighted with a red rounded rectangle. At the bottom of the interface, there is a footer with the logo "rfa" and the text "Powered by Red Flag Alert - B2B Leads | About Us".

## SETTINGS

Red Flag Alert - B2B Leads - Red Flag Alert App



**App Settings**

Main Settings [Field Mapping](#)

**Auto Enrichment Feature (Enabled)**  
When creating or import companies into your CRM, the records will automatically be enriched with Red Flag Alert Data.

Auto Enrichment: companies  On  Off

Auto Enrichment: Create contacts for Companies  On  Off

[Save](#)

[Close App](#)

### AUTO ENRICHMENT FEATURE

Automatic enrichment of company records with Red Flag Alert data.

### HOW IT WORKS

When you create or import records into your CRM with valid company numbers, the records will automatically be updated with Red Flag Alert Data.

When the create contacts for company's switch is on, using the email or website, our app will create contacts and associate them to the company.

**CREDITS: Each company enrichment will be one credit, if you have no credits, no enrichment will be done.**

### COMPANIES - SWITCHING AUTO ENRICHMENT ON/OFF (Default OFF)

- Open the App, click on "Settings" button.
- Click On/Off button for "Auto Enrichment Organizations"

### CREATE CONTACTS FOR COMPANIES ON/OFF (Default OFF)

- Open the App, click on "Settings" button.
- Click On/Off button for "Auto Enrichment: Create contacts for Companies".

### AUTO ENRICHMENT – Disabled

If auto enrichment is disabled, ask you Red Flag Alert account manager, about enabling it.

### FIELD MAPPING

You can switch ON/OFF all RFA custom fields, including mapping the fields to your own HubSpot fields.

App Settings

Main Settings **Field Mapping**

Company Field Mapping (85 of 87)

| RFA Field Name       | Description                   | Resource        | Type   | HubSpot API Name        | HubSpot Field Name   | Status |
|----------------------|-------------------------------|-----------------|--------|-------------------------|----------------------|--------|
| RFA Actual Turnover  | Company actual turnover       | Company         | number | redflag_actual_turnover | Actual Turnover      | ON     |
| RFA Address Postcode | RFA Address Postcode          | Company         | string | zip                     | RFA Address Postcode | ON     |
| RFA Address Street   | RFA Address Street            | Company         | string | address                 | RFA Address Street   | ON     |
| RFA Address Town     | RFA Address Town              | Company         | string | city                    | RFA Address Town     | ON     |
| RFA Audit Fee        | The fee paid to the auditors. | Profit and Loss | number | rfa_audit_fee           | RFA Audit Fee        | ON     |

Rows per page: 5 rows 1-5 of 87 << < 1-5 of 87 > >>

Update Field

## CREDIT CHECK/INSIGHTS

Update the company RFA field mapped fields.

**Search Button:** You can search by company name or company number.

**Refresh Data Button:** Updates all RFA data for this company.

**Create Directors:** Create all active directors as Net contacts for company record.

The screenshot displays the 'Company Credit Check/Insights (Auto Enrichment: ON)' interface. At the top, there is a search bar with 'Fujitsu Services Limited' entered. Below the search bar are tabs for 'Core Data', 'More Data (35)', 'CCJs', 'Mortgages', and 'Gazette'. The 'Core Data' tab is active, showing a summary of key metrics: RFA Rating (Bronze), Growth Score (Very Likely), Creditor Days (46), CCJs (n/a), Credit Limit (20,000,000), and Net Worth (688,100,000). There are also LinkedIn links for 'Fujitsu Services Limited' and 'William Patterson'. A table below lists various company details such as Name, Incorporation Date, Email, Phone, Employees, SIC Codes, Description, and Address. At the bottom, there are buttons for 'Refresh Data', 'Close App', and 'Create Directors', along with a confirmation message 'Data successfully loaded.'

**TAB: Core Data:** Display the main RFA field mapped data.

**TAB: More Data:** Displays all the field mapped data.

**TAB: CCJs:** Displays all CCJs information for the company.

**TAB: Mortgages:** Displays all mortgages information for the company.

**TAB: Gazette:** Displays all gazette information for the company.

**TAB: CRM Statistics:** Examine your CRM utilizing insights from Red Flag Alert Data.

The screenshot shows the 'CRM Statistics' interface with three donut charts. The first chart, 'Companies enriched by Red Flag Alert', shows 77% enriched (green) and 23% not enriched (red). The second chart, 'Companies by Rating', shows a distribution across Gold, Silver, Bronze, Newly Incorporated, One - Three Red Flags, Insolvent, and Non Trading. The third chart, 'Companies by Growth Score', shows a distribution across Very Likely, Likely, Unlikely, Very Unlikely, and Unknown.

## CORPORATE STRUCTURE

Displays the full corporate hierarchy related to the current company record, including parent and subsidiary companies.

Company Credit Check/Insights (Auto Enrichment: ON)

Law Debenture Corporation Plc(the) or Company number Search

Core Data More Data (36) Corporate Structure (307) CCJs Mortgages Gazette CRM Statistics

| Company Name   | Company Number |
|--|----------------|
| 0- Law Debenture Corporation Plc(the)                | 00030397       |
| 1- Beagle Nominees Limited                           | 00628724       |
| 1- L.d.c. Trust Management Limited                   | 01234879       |
| 2- The Law Debenture Trust Corporation (cayman) Ltd. |                |
| 1- The Law Debenture Intermediary Corporation P.I.c. | 01525148       |

5 rows |< < 1-5 of 307 > >|

Create Company

### Button: Create Company

Creates a **new company record** for the selected company in the table.

If a company already exists with the same company number, no new record will be created.

## FIND CONTACTS

Created contacts will be associated to the company.

### Search Button

Search for contacts using the domain name.






### Actions Button

Click to create contact.

**IMPORTANT NOTE:** No credits are charged for this, as we cannot guarantee the quality of the emails.

Contacts found for domain: **www.fujitsu.com**

Click the actions icon, to create the contact.

| Actions   | Name                | Email                          | Status          | Position                                |
|---|---------------------|--------------------------------|-----------------|---|
|    | Ben Greenfield      | ben.greenfield@fujitsu.com     | verified        | SAP Technical Manager                   |
|    | Ben Greenfield      | greenfieldben@fujitsu.com      | verified        | SAP Technical Manager                   |
|   | <b>Rob Digwood</b>  | <b>rob.digwood@fujitsu.com</b> | <b>verified</b> | <b>Customer Solution Architect</b>      |
|  | Junaid Hasan        | junaid.hasan@fujitsu.com       | verified        | Technical Project Manager               |
|  | undefined undefined | maninder.oberai@fujitsu.com    | verified        | Technical Lead/Project Manager - SAP BW |

Rows per page: 5 rows ▾ 1-5 of 50 |< < 1-5 of 50 > >|

[Close](#)

## FIND LEADS

Create new company records, with the option to create contacts associated to the company.

### Field: New record owner

The user can assign the new company records to another user within their CRM.

### Field: Create Company contacts

If this option is ON, new contacts records will be created.

**IMPORTANT NOTE:** No credits are charged for contacts, as we cannot guarantee the quality of the emails.

### Field: Create Company directors

If this option is ON, all active directors will be created.

The screenshot displays the 'Find Leads' configuration interface within the Red Flag Alert HubSpot App. At the top, a dark blue navigation bar contains the 'redflagalert' logo and menu items: 'Credit Check/Insights', 'Find Contacts', 'Find Leads', 'Settings', and 'Help'. On the right side of this bar, it shows '55,496 of 100,000 Credits'. Below the navigation bar, a light blue banner reads 'Find Leads - Enrich your CRM on every UK business, giving you insights to deliver best-in-class sales and credit risk.' The main configuration area features a 'Scheduler is idle' indicator with a 100% progress bar. Below this, a horizontal menu includes 'Company/Contacts', 'Scores', 'SIC Codes', 'Filters', 'Dates & Ranges', 'Location', 'Debenture/Mortgages', and 'Scheduler List'. The configuration panel includes several fields: 'Campaign Name' (text input with 'test001'), 'New record owner' (dropdown menu with 'Jason Dahar'), 'Keyword Filter' (text input with 'filter company name by keyword'), 'Auditor Keyword Filter' (text input with 'kpmg'), 'Company Type' (dropdown menu with 'Limited'), 'Create Company contacts' (toggle switch currently set to 'Off'), 'Create Company directors' (toggle switch currently set to 'Off'), and 'Contact Job Title Filter' (multi-select dropdown with 'Senior Management (VP, President, Directors, MD, CEO, Chief, Chairman, Head)' and 'Marketing and Sales (Marketing, Sales)'. At the bottom of the configuration panel are three buttons: 'Search', 'Clear', and 'Close App'. A green status message at the bottom left reads 'Schedule list refreshed'.

### Find Leads – Results List

#### Actions Button (In List)

You can create each company record in the list.

#### Generate Records Button

Create all company records.

Ready to generate 430 companies.

| Actions | Company Number | Company Name                   | Address | Type       | Turnover   | Rating       |
|---------|----------------|--------------------------------|---------|------------|------------|--------------|
|         | 01526281       | G.i. Hadfield & Son Limited    | M43 7LB | Trading    | 13,220,000 | Bronze       |
|         | 13303085       | Leclerc Foods Uk Limited       | M3 2ER  | Registered | 7,041,941  | Bronze       |
|         | 01958053       | Dtp Hospitality Uk Limited     | M1 3DG  | Trading    | 4,200,000  | Bronze       |
|         | 06282949       | Energy Acquisitions Uk Limited | WA3 6GR | Trading    | 11,000,000 | Silver       |
|         | 01908249       | Dcc Energy Uk Limited          | WA3 6GR | Trading    | 20,000,000 | One Red Flag |

Rows per page: 5 rows | 1-5 of 50 | < >

**Generate Records** **Cancel**

### Scheduler List

Displays all the find lead campaigns you have created.

Find Leads - Enrich your CRM on every UK business, giving you insights to deliver best-in-class sales and credit risk.

Scheduler is idle

100%

Company/Contacts | Scores | SIC Codes | Filters | Dates & Ranges | Location | Debenture/Mortgages | Scheduler List

| Campaign Date | Campaign Name | Duplicates | New | Processed | Total | Status   |
|---------------|---------------|------------|-----|-----------|-------|----------|
| 22-07-2023    | Campaign name | 0          | 120 | 120       | 120   | Finished |

Rows per page: 5 rows | 1-1 of 1 | < >

**Refresh Schedule List** **Delete Schedule**

## HUBSPOT CUSTOM FIELDS CREATED BY APP

Please note not all these fields are created when you install the App.

Group Name: **Red Flag Financial Information**

Company Record: **Custom Fields**

- RFA Company number
- RFA Company name
- RFA Rating Code
- RFA Rating Description
- RFA Actual Turnover
- RFA Estimated Turnover
- RFA Creditor Days
- RFA Credit Limit
- RFA SIC Codes
- RFA SIC Description
- RFA SIC Group Description
- RFA Incorporation Date
- RFA TPS Registered
- RFA Latest Action
- RFA Latest Action Date
- RFA Latest Accounts Filed Date
- RFA Cash In Bank
- RFA Net Worth
- RFA Email
- RFA Directors
- RFA CCJs Amount
- RFA Number of CCJs
- RFA CCjs Satisfied
- RFA VAT Number
- RFA Trading Address
- RFA Address Street
- RFA Address Town
- RFA Address Postcode
- RFA Telephone number
- RFA Employees
- RFA Website - Domain
- RFA Website
- RFA Total Current Assets
- RFA Total Fixed Assets
- RFA Tangible Fixed Assets
- RFA PL Account Reserve
- RFA Balance Sheet Account Date
- RFA Working Capital
- RFA Trade Debtors
- RFA Shareholders Funds
- RFA Stocks
- RFA Misc Current Assets
- RFA Total Long Term Liabilities

- RFA Creditors Amounts Falling
- RFA Total Assets Less Liabilities
- RFA Revaluation Reserve
- RFA Share Capital Reserve
- RFA Total Liabilities
- RFA Total Assets
- RFA Contingent Liabilities
- RFA Intangible Assets
- RFA Pre Tax Profit
- RFA Directors Remuneration
- RFA Profit and Loss Account Date
- RFA Retained Profit
- RFA Audit Fee
- RFA Interest Payable
- RFA Non Trading Income
- RFA Operating Profit
- RFA Dividends
- RFA Taxation
- RFA Gross Profit
- RFA Non Audit Fee
- RFA Post Tax Profit
- RFA Value Added
- RFA Cost Of Sales
- RFA Cashflow Account Date
- RFA Net From Operating Activities
- RFA Net From Return Investment Servicing
- RFA Increase In Cash
- RFA Net Before Financing
- RFA Net From Financing
- RFA Auditor
- RFA Company Type
- RFA Number of Active Directors
- RFA Parent Company Number
- RFA Group ID
- RFA Company ID
- RFA Growth Score
- RFA Shareholder Name 1
- RFA Shareholder Quantity 1
- RFA Shareholder Name 2
- RFA Shareholder Quantity 2
- RFA Shareholder Name 3
- RFA Shareholder Quantity 3
- RFA Shareholder Name 4
- RFA Shareholder Quantity 4
- RFA Best SIC Codes

**Contact Record: Custom Fields**

- Social Media URL
- RFA Search Campaign