



Pipedrive App
Credit Check & Find Leads

pipedrive

Version 1.17
16th September 2023

WHAT THE APP CAN DO

Functionality of the App

1. Credit Check: Enhance organization records by integrating Red Flag Alert data for thorough credit checks.
2. Lead Generation: Easily discover and generate organization/lead records using the extensive Red Flag Alert database.
3. Field Mapping: Seamlessly map up to 81 Red Flag Alert data fields to either our custom fields or your preferred fields. Customize field visibility as needed.

Minimum CRM Edition Requirements

This app is compatible with Pipedrive's Essential plan and higher.

HOW TO INSTALL APP

To install the app, follow these simple steps:

1. Log in to your Pipedrive account.
2. Navigate to the "Marketplace" within Pipedrive.
3. Search for "Red Flag Alert" in the marketplace.
4. Click on the app and proceed to install it.

OR [CLICK HERE](#)

HOW TO ACCESS THE APP

To access the "Red Flag Alert App" for an organization record, please follow these steps:

1. Log in to your Pipedrive account.
2. Navigate to the organization record you want to work with.
3. Within the organization record, look for a button or option labelled "Red Flag Alert App."
4. Click on this button to access the Red Flag Alert App's features and functionality specific to that organization record.

The screenshot shows the Pipedrive interface with the 'Organisations' tab selected. The main content area displays the 'RFA COMPANY DETAILS' for 'British Airways Plc', updated on 4 December 2022 at 10:33. The details include:

Company Number	01777777
RFA Rating	Bronze
Rating Description	Companies will be in acceptable health. They may not have published accounts or are a newly formed, but nothing significantly detrimental is known. Where financials are present, gearing may be higher than normal, or liquidity may be lower than ideal. T...
RFA Credit Limit	£7,500,000
Turnover	£3,693,000,000
RFA Creditor Days	113
RFA CCJs	87
RFA CCJs Amount	£94,012
RFA Networth	£760,000,000
RFA Latest Action	New Detrimental Data

Annotations in the image include a red arrow pointing to the 'RFA Rating' and 'Rating Description' section, labeled 'Displays key RFA information', and a red circle around the 'Red Flag Alert App' button at the bottom, labeled 'Click to access App'.

FIELD MAPPING

Pipedrive Essential Plan: This plan permits only up to 30 custom fields for organizations.

Pipedrive Advanced Plan and Above: These higher-tier plans offer the flexibility to utilize 100+ custom fields.

App Settings and Field Mapping

Settings **Field Mapping**

Organization Field Mapping (28 of 81)
Pipedrive Plan Essential only allows 30 custom fields for Organizations, Plan Advance and above allows 100+ custom fields.

RFA Field Name	Description	Resource	Type	Pipedrive Field Name	Status
RFA Audit Fee	The fee paid to the auditors	OTHER: Profit and Loss	double	RFA Audit Fee	ON
RFA Auditor	Name of the company's auditor, if any	OTHER: Cashflow	varchar	RFA Auditor	ON
RFA Balance Sheet Account Date	The date of the accounts	OTHER: Balance Sheet	date	RFA Balance Sheet Account Date	OFF
RFA Cash In Bank	Cash In Bank	CORE: Company	double	RFA Cash In Bank	ON
RFA Cashflow Account Date	The date of the accounts	OTHER: Cashflow	date	RFA Cashflow Account Date	ON

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Update Field **Close**

Button: Update Field

When a field is turned off, it means that updates or changes to that field will not be processed or recorded.

Update Field: RFA Cash In Bank

Field Name: RFA Cash In Bank

Field Description: Cash In Bank

Red Flag Alert Resource: CORE: Company

Field Type: double

Current Pipedrive Field Name: RFA Cash In Bank

Current Pipedrive Field API Name: Field already exists.

Choose Pipedrive Field:

Status: On Off

Update **Cancel**

You have the option to either establish a new custom field or associate it with an existing one.

Button: Update

You can create a new field if it doesn't already exist and toggle the field's activation status on or off."

SETTINGS

Update Organisation's Name	<input checked="" type="checkbox"/>	Off
Update Organisation's Address	<input checked="" type="checkbox"/>	Off
Find Leads: Create Lead for Organisation	<input checked="" type="checkbox"/>	Off
Auto Enrichment Feature (Enabled)		
When creating or import organizations into your CRM, the records will automatically be enriched with Red Flag Alert Data.		
Auto Enrichment: Organizations	<input checked="" type="checkbox"/>	Off
Auto Enrichment: Create contacts for Organizations	On	<input checked="" type="checkbox"/>

Option: Update Organization Name

By default, this option is set to "ON." When enabled, performing a credit check will overwrite the organization's name.

Option: Update Organization Address

By default, this option is set to "ON." When enabled, performing a credit check will overwrite the organization's address.

Option: Leads - Automatically Create Lead for Organizations

This option allows for the automatic generation of a Lead record for every newly created Organization.

AUTO ENRICHMENT FEATURE

Automatically enhance organization records with Red Flag Alert Data.

HOW IT FUNCTIONS

When you create or import records into your CRM with valid company numbers, the records will receive automatic updates with Red Flag Alert Data. If the "Create contacts for organizations" switch is activated, our app will also create contacts and associate them with the respective organization.

CREDITS: Each organization enrichment process consumes one credit. If you have no credits available, no enrichment will take place.

ENABLING/DISABLING AUTO ENRICHMENT FOR COMPANIES (Default: OFF)

- Open the App and click the "Settings" button.
- Toggle the On/Off switch for "Auto Enrichment Organizations."

ENABLING/DISABLING CONTACT CREATION FOR ORGANIZATIONS (Default: OFF)

- Open the App and click the "Settings" button.
- Toggle the On/Off switch for "Auto Enrichment: Create contacts for Organizations."

DISABLED AUTO ENRICHMENT

If auto enrichment is disabled, please reach out to your Red Flag Alert account manager to inquire about enabling this feature.

CREDIT CHECK/ENRICHMENT

Update the Organization's Custom Fields from RFA

Search Button

You have the option to search using either the company name or company number.

Refresh Data Button

Clicking this button will refresh all the RFA data associated with this organization. Update the organisation RFA custom fields.

Red Flag Alert App

RedFlagAlert Credit Check Find Contacts Find Leads Settings Help 976,082 of 1,000,000 Credits

Organisation Credit Check/Insights (Auto Enrichment: ON)
Field Mapping: ON

British Airways Plc or Company number Search

Core Other Data (4) CCJs (83) Mortgages (868) Gazette (0)

RFA Rating	Growth Score	Creditor Days	CCJs	Credit Limit	Net Worth	LinkedIn	LinkedIn
Silver	n/a	58	80,382 (75)	20,000,000	1,286,000,000	British Airways Plc	Andrew Fleming

Company Name	British Airways Plc	Company Number	01777777
Incorporation Date	13-12-1983	Full Company Report	Full Red Flag Alert Report
Company Email	press.office@ba.com	Turnover	11,030,000,000
Company Phone	02087385050	Cash In Bank	2,376,000,000
Employees	33,625	Director(s)	Andrew Fleming, Alison Brittain, Sean Doyle, Alison Reed, Nicholas Cadbury, Jose Barrionuevo
SIC Codes	51101, 52230, 51102, 52242	Last Company Action	New Detrimental Data
SIC Description	51101 - Scheduled passenger air transport	SIC Group Description	Passenger air transport
Address	Waterside, Po Box 365, Harmondsworth, UB7 0GB	Last Filed Accounts	31-12-2022
Website	https://www.britishairways.com	Update Date	16-09-2023

Refresh Data Close

Core Tab - This tab showcases the primary RFA field-mapped data.

Other Data Tab - This tab provides a comprehensive display of all field-mapped data.

CCJs Tab - Here, you can find detailed information on all CCJs associated with the company.

Mortgages Tab - This tab offers insights into all mortgage-related information for the company.

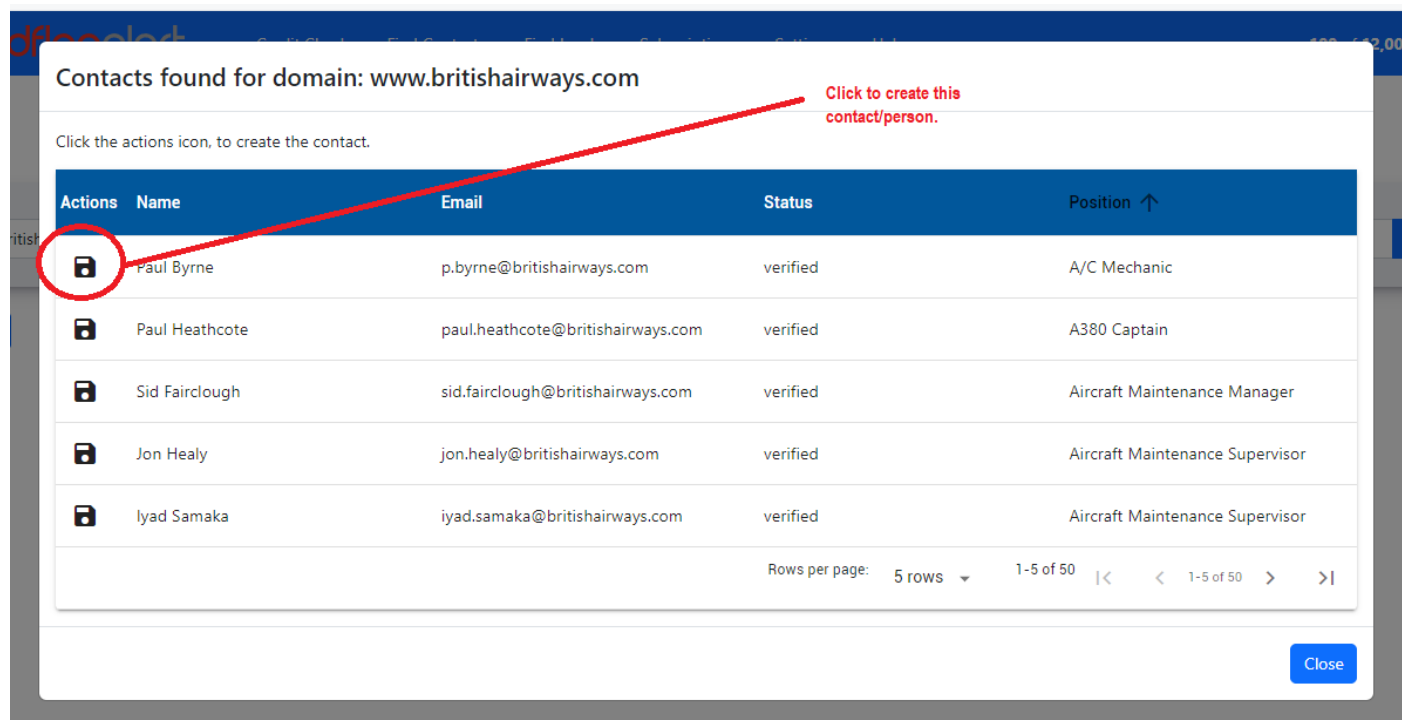
Gazette Tab - This tab presents all gazette-related information pertaining to the company.

FIND CONTACTS (Persons)

Users have the capability to create contacts (individuals) and link them to the organization.

Search Button






Utilize this button to search for contacts based on their domain name.



Contacts found for domain: www.britishairways.com

Click the actions icon, to create the contact.

Click to create this contact/person.

Actions	Name	Email	Status	Position ↑
	Paul Byrne	p.byrne@britishairways.com	verified	A/C Mechanic
	Paul Heathcote	paul.heathcote@britishairways.com	verified	A380 Captain
	Sid Fairclough	sid.fairclough@britishairways.com	verified	Aircraft Maintenance Manager
	Jon Healy	jon.healy@britishairways.com	verified	Aircraft Maintenance Supervisor
	Iyad Samaka	iyad.samaka@britishairways.com	verified	Aircraft Maintenance Supervisor

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Close

FIND LEADS

This feature allows you to establish new organization records, and you also have the choice to create associated persons (contacts) records.

Field: New record owner

You can assign ownership of the new organization records to another user in your CRM. The default setting is the current user.

Field: Create Organisation contacts

When this option is enabled, new persons (contacts) records will be automatically generated.

Red Flag Alert App

Credit Check Find Contacts Find Leads Subscriptions Settings Help 100 of 12,000 Credits

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

Scheduler is idle (2,000 per hour) 100%

Company/Contacts Scores SIC Codes Filters Dates & Ranges Location Scheduler Lists

Campaign Name Campaign name

New record owner Jason Dahar

Keyword Filter filter company name by keyword

Company Type ALL

Create Organisation contacts On **Off**

Contact Job Title Filter ALL

Search Clear Refresh Schedule List Close

Schedule list refreshed

Red Flag Alert App

100 of 12,000 Credits

Ready to generate 180 organisations with contacts.

Company Number	Company Name	Address	Type	Turnover ↑	Rating
10205341	Parmar & Co Solicitors Limited	PR2 5BQ	Trading	1,260,000	Bronze
07796935	Harwood Solicitors Ltd	BB2 2AL	Trading	1,635,000	Bronze
07294169	Amt Lawyers Ltd	BB1 8AF	Trading	1,905,000	Silver
08367875	Southerns Solicitors Limited	BB11 1ES	Trading	2,875,000	Gold
08142424	Veritas Law Ltd	BB1 8EA	Trading	200,000	Silver

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Generate Records Cancel

Searching for records, please wait...

Scheduler List

Shows all the lead discovery campaigns you've established.

redflagalert Credit Check Find Contacts Find Leads Subscriptions Settings Help 12,000 of 12,000 Credits

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

Scheduler is idle (2,000 per hour)
100%

Company/Contacts Scores SIC Codes Filters Dates & Ranges Location Scheduler Lists

Campaign Date	Search Name	Total Records	Duplicates	New Records	Status
04-12-2022	solicitors	180	2	178	Finished

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Search Clear Refresh Schedule List Close

Schedule list refreshed

PIPEDRIVE CUSTOM FIELDS CREATED BY APP

Organisation:

- RFA Company Number
- RFA Company Id
- RFA Campaign Name

Person:

- RFA Position
- RFA Social URL

FIELD MAPPING

You can create the following fields in field mapping or use your own.

CORE Fields

RFA Rating	RFA Credit Limit
RFA Turnover	RFA Creditor Days
RFA CCJs	RFA CCJs Amount
RFA Net worth	RFA Latest Action
RFA Cash In Bank	RFA Incorporation Date
RFA Email	RFA Phone
RFA Employees	RFA SIC Codes
RFA SIC Description	RFA Website
RFA Directors	RFA SIC Group Description
RFA Last Filed Accounts	

OTHER Fields

RFA Registered Address	RFA Latest Action Date
RFA TPS Registered	RFA CCJs Satisfied
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 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 Company Number