



Salesforce App

# Key Features

**Credit Check, Find Leads & Portfolio Manager**

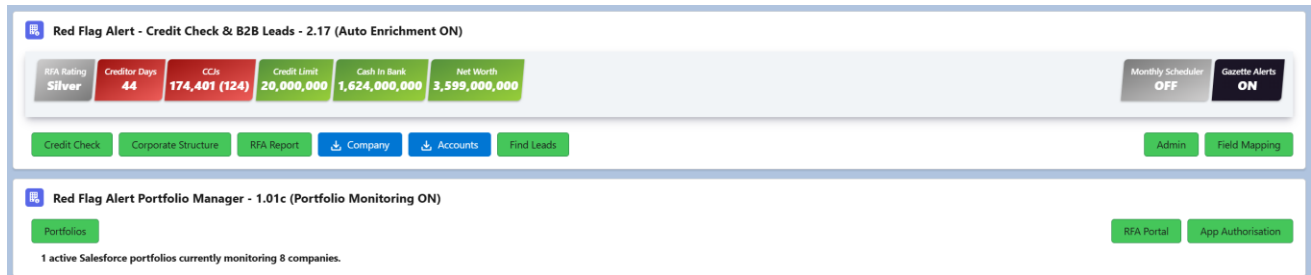
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## INTRODUCTION

This guide highlights the key features of the Red Flag Alert Salesforce Apps for sales teams. Red Flag Alert connects your Salesforce CRM to a live database of over 6.5 million UK businesses, giving you instant access to financial health data, credit scores, corporate structures, and contact intelligence — directly on Lead and Account records.



## WHAT OUR APP OFFERS

### Credit Check

Enriches Lead and Account records with Red Flag Alert data and generates new leads/contacts.

### Find Leads

Find and generate lead records from the Red Flag Alert database.

### Field Mapping

Map up to 80 Red Flag Alert data fields to custom or standard Salesforce fields. Switch individual fields on or off.

### Monthly Accounts Refresh

Updates ALL your account records that have company numbers with Red Flag Alert data. Executes on the last day of each month. No credits used.

### Manual Accounts Refresh

Same as the Monthly Accounts Refresh, but you can run it once per day. No credits used.

### Gazette Notifications

Notifies you within two hours of any company gazette notice by creating a task associated with the Account record. No credits used.

### Portfolio Manager

Track financial health, risk events, and changes across your customer and prospect base with 24/7 automated monitoring.

## CREDIT CHECK

Search by company name, company number, or postcode to enrich any Lead or Account with live business data. One click pulls in financials, risk scores, directors, SIC codes, and more.

Download the latest company accounts as a PDF attachment.

## FIND CONTACTS

Discover key contacts at any company using their website or email domain, then create Lead or Contact records with a single click.

## FIND LEADS

Build targeted prospect lists using detailed search criteria against the entire Red Flag Alert database, then generate Lead records — with optional director contacts — straight into your CRM.

The screenshot shows the RedFlagAlert interface for a credit check on British Airways Plc. The top navigation bar includes the logo, 'Credit Check @ B2B Leads | Subscription Enabled | Version 2.17', and a user credit balance of £410 of 10,000. A search bar contains 'British Airways Plc' and a 'Search' button. Below the search bar, a summary row displays key metrics: Risk Rating (Silver), Growth Score (Likely), Credit Score (44), CCA (174,401 (124)), Credit Limit (20,000,000), Cash in Bank (1,624,000,000), and Net Worth (3,599,000,000). Two 'LinkedIn' buttons are visible for 'British Airways Plc' and 'Andrew Fleming'. The main content area is divided into two columns of company details. The left column includes: Company Name (British Airways Plc), Incorporation Date (13/12/1983), Company Email (press.office@ba.com), Company Phone (02087385050), Actual/Estimate Employees (46,521), SIC Codes (51101,51101,52230,51102,52242,52230,52242), and SIC Description (Scheduled passenger air transport). The right column includes: Company Number (0177777), Director(s) (Andrew Fleming, Jose Barrionuevo, Alison Brittain, Nicholas Cadbury, Sean Doyle, Martha Lane-fox), Actual Turnover (14,568,000,000), VAT Number (GB222452988), Last Company Action (New Detrimental Data), SIC Group Description (Passenger air transport), RFA Rating Description (Companies will be stable overall. They will have healthy financials, and a normal history of filing compliance. Gearing will be within an acceptable range, with reasonable levels of liquidity. If the trend is not upward, any declines will be modest, with few if any significant or recent legal notices. Considered to be low risk and open credit is recommended.), Last Filed Accounts (31/12/2024), Ultimate Company (N/A), FCA Website (Financial Conduct Authority), and RFA Update Date (17/03/2026). At the bottom, there are buttons for 'Update', 'Find Contacts', 'Refresh', 'Close', and 'Delete RFA Data'.

The screenshot shows a notification and social media post interface. On the right, a 'Notifications' panel is open, listing three notifications: 'Red Flag Alert: Add companies to Portfolio' (9 minutes ago), 'Red Flag Alert - Portfolio Events' (26 minutes ago) for Boc Limited (00337663) with a creditor services account link, and another 'Red Flag Alert: Add companies to Portfolio' notification (16 hours ago). Below the notifications, a social media post by Jason Dahar (15h ago) is visible, titled 'Red Flag Alert - Portfolio Events' for Boc Limited (00337663) with creditor services. The post includes 'Like' and 'Comment' buttons and a text input field for a comment.

## CORPORATE STRUCTURE

Displays the full corporate hierarchy related to the current Account record, including parent and subsidiary companies. Includes which companies you already have within your CRM.

### **Button: Create Account**

Creates a new Account record for the selected company in the table. If an Account already exists with the same Company Number, no new record will be created.

### **Button: Create Lead**

Creates a new Lead record for the selected company in the table. If a Lead already exists with the same Company Number, no new record will be created.

## AUTO ENRICHMENT

Automatic enrichment of Lead records with Red Flag Alert data. When a Lead record is created, a trigger will enrich it using the company name, RFA company number, and postcode.

Each lead enrichment costs one credit. If you have no credits, no enrichment will be done.

This feature is switched off by default and can be toggled in the Admin settings.

## FIELD MAPPING

Map your Account and Lead Salesforce fields to Red Flag Alert data. Up to 80 data fields are available. Each field can be switched on or off individually, giving you full control over what gets updated during credit checks, refreshes, and auto enrichment.

## MONTHLY & MANUAL REFRESH

### **Monthly Accounts Refresh**

- Runs automatically on the last day of each month
- Updates ALL Account records that have company numbers
- Fields updated are based on your Account field mapping
- Telephone and address will not be updated
- No credits used

### **Manual Accounts/Leads Refresh**

- Same as the monthly refresh but triggered manually
- Can be run once per day
- Available for both Account and Lead records
- No credits used

## GAZETTE NOTIFICATIONS

Monitors all your accounts against The Gazette (the Official Public Record) for insolvency and legal events. Creates a Salesforce Task on the Account within two hours of any notice. No credits used.

Notification Type	Notification Type
Administration Order	Administrative Receiver Appointed
Corporate Voluntary Agreement	High Court Writ
Joint Administrator Appointed	Liquidator Appointed
Meeting of Creditors	Petition Dismissed
Petition to Wind Up	Petition Adjourned
Receiver Manager Appointed	Striking Off Suspended
Striking Off Application	Striking Off Notice
Striking Off Withdrawn	Unadvertised Petition to Wind Up
Voluntary Winding Up	Winding Up Order Rescinded
Winding Up Order	

## PORTFOLIO MANAGER INTEGRATION

Red Flag Alert's Portfolio Manager allows you to track financial health, risk events, and changes across your customer and prospect base. Red Flag Alert processes portfolio events every day, 24/7.

### What Gets Monitored

- Insolvency risk changes
- Credit score movements
- County Court Judgments (CCJs)
- Company events (e.g. PEPs, gazette notices, filings)

### Impact on Your Salesforce CRM

When a portfolio company event occurs:

- The Red Flag Alert data on the associated Salesforce Account record is automatically refreshed
- A company note is created in Salesforce summarising all relevant events affecting that company

## KEY SELLING POINTS

Selling Point	Detail
<b>Live Data</b>	Connected to a database of 6.5 million+ UK businesses, refreshed continuously. No stale spreadsheets.
<b>Zero Manual Effort</b>	Monthly auto-refresh, Gazette alerts, and auto-enrichment keep your CRM accurate without anyone lifting a finger.
<b>Free Refreshes</b>	Monthly and manual account refreshes, Gazette notifications, and credit check refreshes all use zero credits.
<b>80-Field Mapping</b>	Map exactly the data you need to your existing Salesforce fields. Full control over what gets updated.
<b>Prospecting Engine</b>	Find Leads lets you search the entire UK business database by industry, location, and financials — then import prospects in one click.
<b>Corporate Visibility</b>	See the full parent-subsidary structure of any company. Identify group opportunities and risk exposure.
<b>Contact Discovery</b>	Find decision-makers using website or email domain searches. Create Leads or Contacts instantly.
<b>24/7 Risk Monitoring</b>	Portfolio Manager watches your accounts around the clock and alerts you to insolvency risk, CCJs, and company events.
<b>Enterprise Ready</b>	Built for Salesforce Enterprise Edition with professional API integration via trusted endpoints.

## CREDIT USAGE SUMMARY

Understanding what uses credits and what doesn't is a common prospect question. Here's the quick reference:

Action	Credits	Free?
Credit Check (new search)	1	
Credit Check Refresh (existing record)	0	✓
Auto Enrichment (new Lead)	1	
Monthly Accounts Refresh	0	✓
Manual Accounts/Leads Refresh	0	✓
Gazette Notifications	0	✓
Find Leads (per company)	1	
Download Company Report PDF	0	✓

*For more information, visit the [Red Flag Alert Portal](#) or contact your account manager.*