



Salesforce App

Portfolio Manager - Integration

Version 1.01a

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Introduction

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

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:

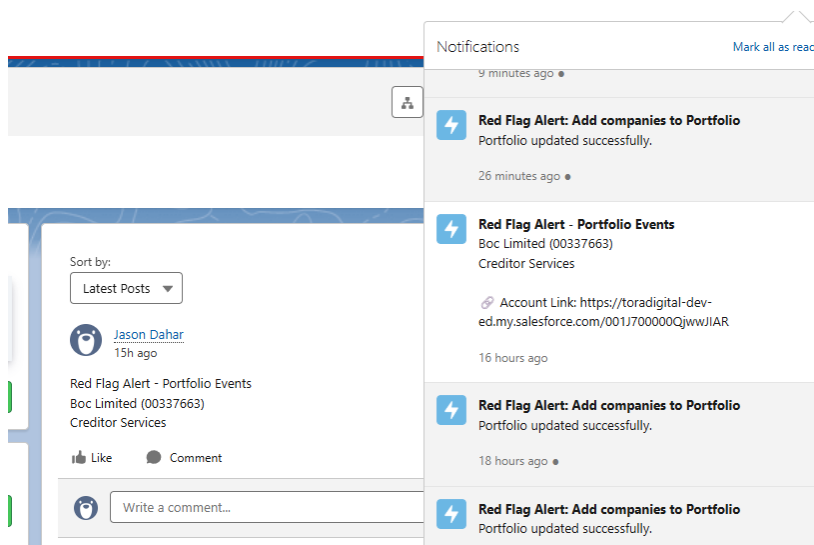
- Insolvency risk
- Credit scores
- CCJs
- Company events (e.g. PEPs, gazette notices, filings)

Impact on your Salesforce CRM

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

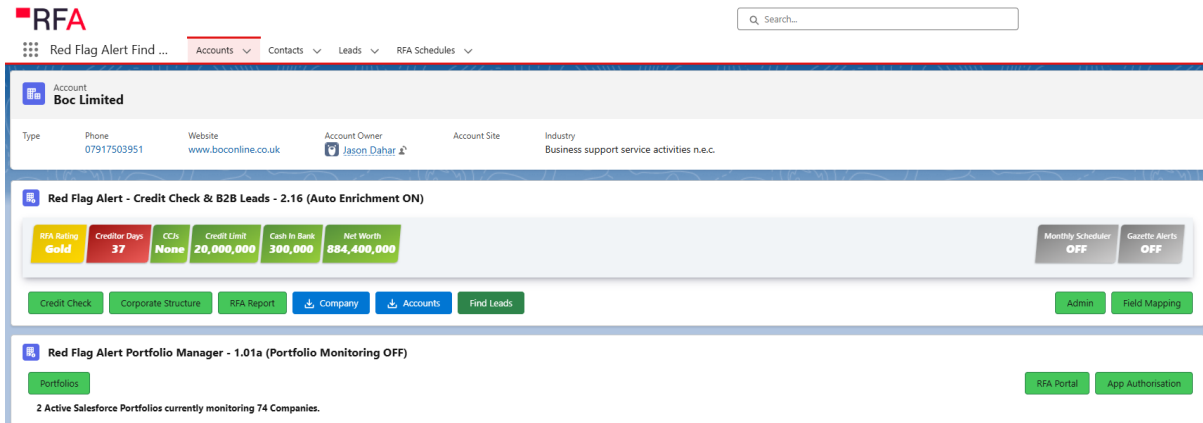
When a portfolio company event occurs:

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



How to Access Portfolio Manager

The app will appear on your Accounts page.



Button: Portfolios

View your portfolios.

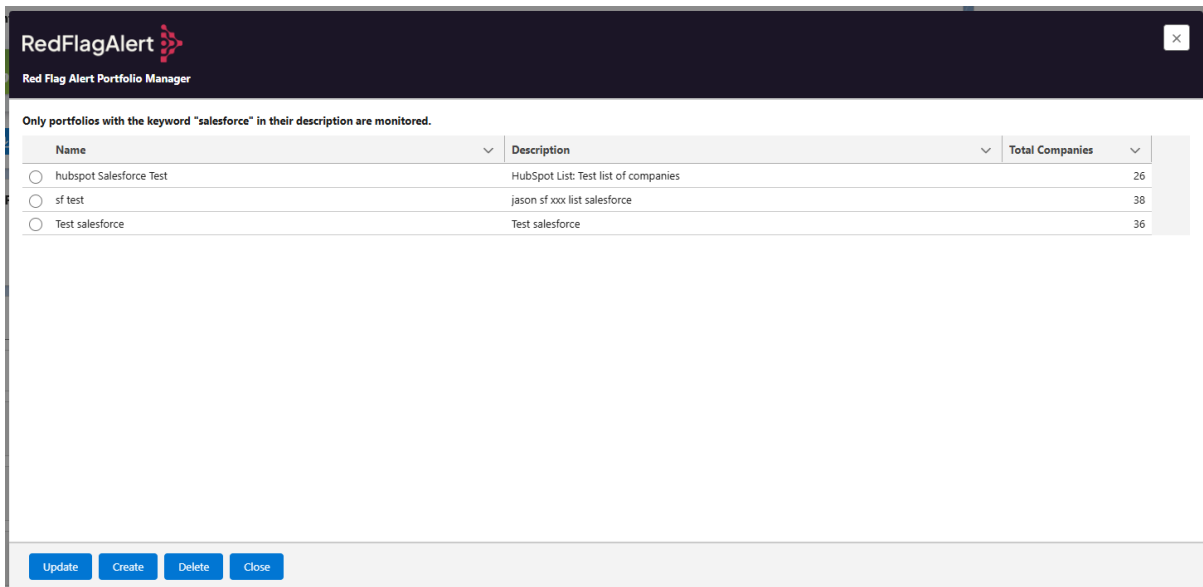
Button: RFA Portal

Opens a new tab to access your Red Flag Alert portfolio portal.

Button: App Authorisation

Connect your Red Flag Alert account to your Salesforce CRM.

View Portfolios



RedFlagAlert
Red Flag Alert Portfolio Manager

Only portfolios with the keyword "salesforce" in their description are monitored.

| Name | Description | Total Companies |
|---|--------------------------------------|-----------------|
| <input type="radio"/> hubspot Salesforce Test | HubSpot List: Test list of companies | 26 |
| <input type="radio"/> sf test | jason sf xxx list salesforce | 38 |
| <input type="radio"/> Test salesforce | Test salesforce | 36 |

Update Create Delete Close

Button: Update

Update the highlighted portfolio.

Button: Create

Create a new portfolio.

Button: Delete

Deletes the highlighted portfolio.

Create or Update the Portfolio

RedFlagAlert

Update Portfolio

Name
Test salesforce

Description
Test salesforce

Recipients
rfaapps007@gmail.com

We leverage Salesforce lists to import companies into your portfolio.

Salesforce - Account Lists
Jason List

Save Portfolio Add Accounts to Portfolio Close

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

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

Button: Save

Save portfolio details.

Button: Add companies to Portfolio

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