



EQUIFAX[®]

Online Gold Portfolio Management

Efficiently manage key business activities that will help you decrease losses and improve your bottom line

Managing risk is of paramount importance in today's environment, yet finding new revenue opportunities for the company is of equal importance. Additionally, if your company is like many others, you may be faced with increased demands supported by fewer resources. How do you balance your account management efforts with your cross-sell efforts and do so more quickly and efficiently? Gold Portfolio Management from Equifax Canada is a dynamic, web-based account management tool that can identify accounts showing signs of risky behavior while also uncovering potential new revenue streams.

Key benefits

- ✔ Quickly identify the high-risk accounts in your portfolio before they impact profitability
 - ✔ Apply targeted treatment strategies based on risk level or opportunity assessment
 - ✔ Positively impact sales and marketing initiatives
 - ✔ Optimize cash flow by prioritizing collection efforts on accounts that are more likely to pay
 - ✔ Improve productivity by minimizing time spent manually reviewing accounts
 - ✔ Enable access for multiple users in disparate locations via a convenient, online interface
-

Identify the best and worst businesses in your portfolio

Gold Portfolio Management offers extraordinary insight into your customers – at the portfolio level and the individual account level.

You have the ability to:



Comprehensive Account Overview: View flagged accounts, complete with calculated totals like score averages, dollars owed, and payment index averages.



Detailed Account Drill-Down: Access individual account specifics, including days past terms, credit score trends, collections, legal inquiries, returned checks, and payment trends.



Flexible Filtering & Sorting: Easily filter and sort accounts by various fields such as company name, city, risk indicator, and credit score.



Portfolio Benchmarking: Benchmark your portfolio's performance against other suppliers/creditors.



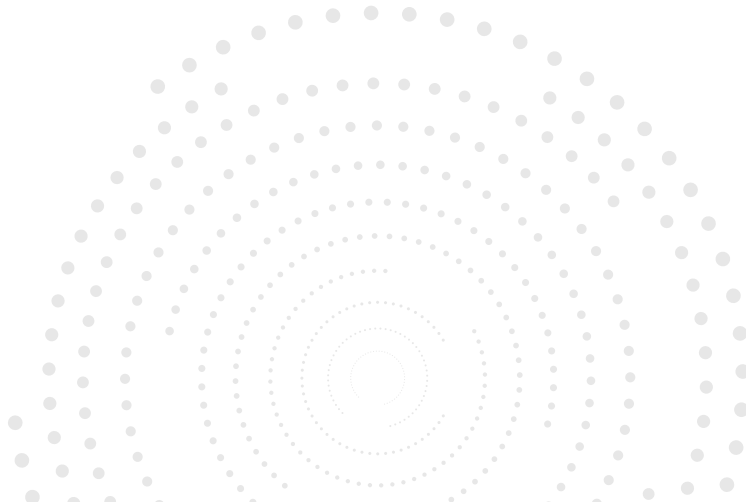
Integrated Data & Reporting: Import additional internal data (up to 30 custom fields) and order business credit reports directly via an online link.



Streamline monitoring in 3 steps

1. You provide the company names for the accounts and prospects you want to monitor.
2. Equifax Canada matches the companies to our database and sets up your reporting schedule.
3. Access your reports via our online tool whenever it is convenient for you.

For even greater insight and efficiency in managing accounts, use Gold Portfolio Management with Online Triggers.



Account reporting made easy

View and print condensed reports on each account, as well as summary reports of the accounts that matched your query.

The sample screens below depict some of the account information available to you through Gold Portfolio Management.

- Manage, sort, and query specific data on the businesses you submitted.
- View and print condensed reports on each account.
- View and print the summary reports matching your specific query.
- Segment your accounts by risk, payment habits, city, province, underwriter, credit/loan/collection officer, broker, credit limits, outstanding balances, policy renewal date, and a host of other items.

Valuable account information is right at your fingertips – anytime, anywhere via a convenient web interface.

Gold Portfolio Management and Online Triggers Download Excel File

Member Code: 105Z206459 Gold File: G1 Online Triggers File:

Contracts Accounts Monitored Generated Alerts Alert Definitions Reports Utilities

Current Accounts

Total Number of Accounts: 35500 Average CDS: 504.661 Accounts with Alerts: 29934 Accounts with Alerts Last Period: 544 Average CI: 11 Average PI: 6 Average CDS: 438 Average BFRS: 1369 Average FTDS: 709

Accounts Monitored Filter 10 Per page

Reference #	Equifax File #	Company Name	City	Alerts	Last Period	CI	PI	CDS	BFRS	FTDS	Gold Account Update Date	Customfield2	Customfield3	Customfield4	Custom
72747	0081355622	02 PLANNING & DESIGN INC	CALGARY, AB	8	-	-	-	-	-	-	-	-	-	-	-
1022613	0090229451	101102297 SASKATCHEWAN LTD DBA BRAIN TE	SK	-	-	10	NA	441	1449	712	-	-	-	-	-
77216	0070683865	1026387 ALBERTA LTD	LETHBRIDGE, AB	1	-	-	-	-	-	-	-	-	-	-	-
76100	0082877606	1027273 ALBERTA LTD	CALGARY, AB	1	-	-	-	-	-	-	-	-	-	-	-

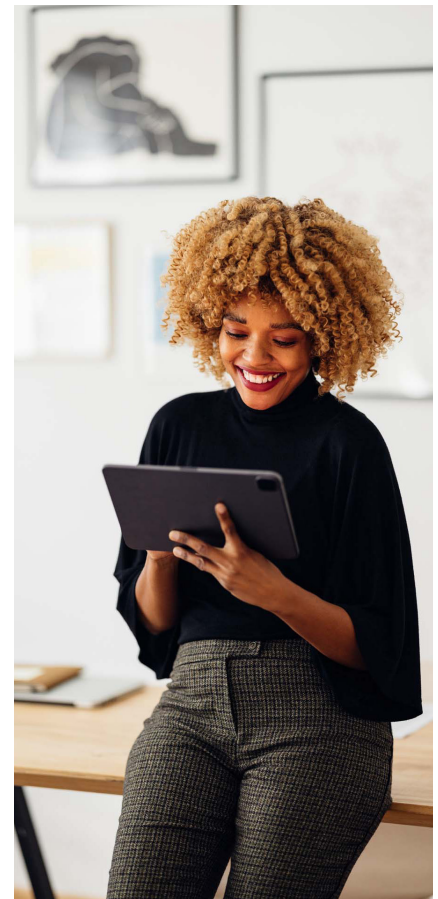
Summary Report Download Excel File

[Back to Report Lookup](#)

Results

Accounts: 1692 10 Per page

Company Name/Address	Subject # Reference # Equifax File #	Custom Import Data	CI	PI	CDS	BFRS	FTDS	Lines/ Total Owning	QTY/ Deref/ Total \$	Legal Items
101102297 SASKATCHEWAN LTD DBA BRAIN TE BOX 422 57N MAIN - NORTH BATTLEFORD, SK S9A 2Y4	812796 1022613 0090229451	-	10	NA	441	1449	712	-	0 0001-01-01 \$0.00	
11263 ALBERTA TO BETTER BUY ELECTRONICS 6108 GATEWAY BLVD EDMONTON, AB T6H 2H8	- 1152140 0074254969	-	-	-	-1	-1	-1	-1	-4 -\$1.00 -\$3.00	
1230185 ONTARIO INC DBA RT CONSULTAN PO BOX 11291 STN H NEPEAN, ON K2H 7Y9	890764 1098075 0088854101	-	10	NA	459	1449	735	-	0 0001-01-01 \$0.00	
1233398 ALBERTA INC DBA DIGITAL BUSINESS 10536-106 STREET EDMONTON, AB T6H 2X6	ADU1356 1143976 0080038623	-	10	NA	332	1526	708	-	0 0001-01-01 \$0.00	
# 150800 9179-4057 QUI BEC INC / BIUROPLUS 1805 AUTOROUTE LAVAL OUEST LAVAL, QC H7L 3W3	NF8998 1129047 0048013686	TEST PROD 24MAR2024 FIELD2 TEST FIELD3 TEST	10	NA	456	1311	726	2	1 \$407.00 \$340.00	2020-11-26



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