

Are you missing critical business changes? The challenge of staying informed in a dynamic market.

In today's fast-paced business environment, organisations constantly face the challenge of keeping up with changes in their client and business relationships. Historically, staying informed meant time-consuming, manual checks to get updates on businesses, without knowing if anything had actually changed.

This often incurred significant costs and took up valuable time, leading to delayed responses to crucial business shifts.

Without real-time insights, businesses risk outdated records, missed opportunities, and exposure to unforeseen risks in their portfolio.

The need for seamless integration of business data into existing workflows is more critical than ever to eliminate inefficiencies and ensure data accuracy.



Introducing Portfolio Monitoring – Your solution for proactive business intelligence



Transform your operations with real-time business monitoring

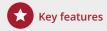
Portfolio Monitoring is designed to empower clients with proactive, event-based alerting on critical business changes. This product is an expansion of the existing Portfolio Monitoring service, now with powerful API functionality for seamless integration.

It addresses the problems of manual checks and delayed updates by providing alerts only on the companies and businesses that matter to you, ensuring timely action.

The API allows these data updates to be seamlessly integrated into your onboarding processes, due diligence systems, and other essential business workflows.

This eliminates the need for multiple logins or systems to review, streamlining your operations and ensuring your data is always current and aligned with external sources.





Powerful features for comprehensive business insights



Event-based alerting: Receive proactive alerts on business changes across four key areas: credit and score changes, identification data changes, detrimental data changes, and non-limited data.



Configurable profiles: Set up flexible profiles to monitor specific lists of companies against various alert types. You can create profiles tailored to any client use case, such as by sector, industry, or region.



Flexible delivery: Get alerts daily, weekly, or monthly as required, delivered via our online portal or directly through the API.



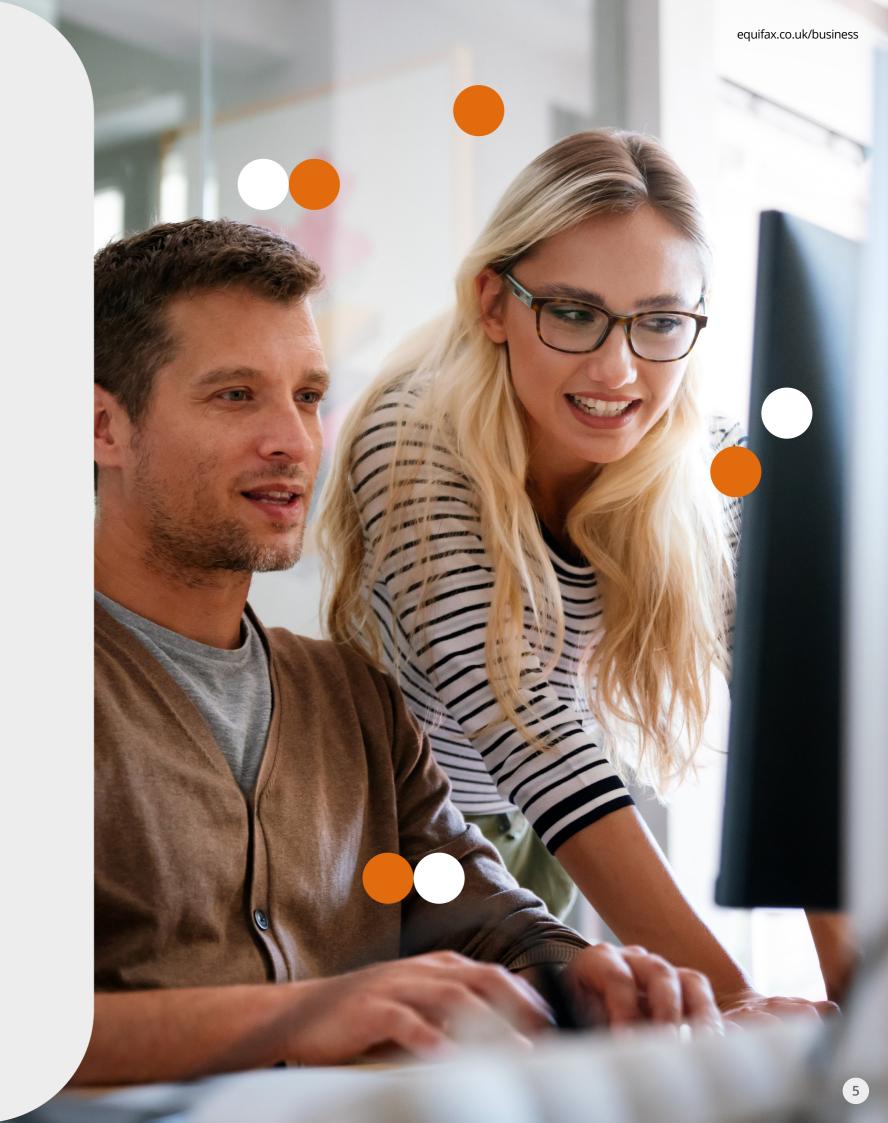
Seamless API integration: Integrate monitoring within your existing workflows and journeys, enabling actionable data journeys based on alert-driven processes. This includes managing monitoring lists and viewing alerts directly within your business processes.



Centralised monitoring management: Add and remove companies from profiles and review/process alerts via both our online portal and the API, offering flexibility and compatibility.



Comprehensive data sources: Alerts are generated from a variety of internal and external sources, including Companies House, CCJ data, and Gazette data from the High Courts.







Unlock efficiency, accuracy, and strategic advantage



Proactive information: Understand changes in business information at the earliest opportunity, ensuring your client databases are kept up to date and aligned with external sources.



Enhanced collaboration: The Portfolio Monitoring API allows companies and alerts to be maintained and viewed on either system as required.



Actionable intelligence: Integrate monitoring and updates directly into business workflows, driving processes using real-time alerts without manual intervention. This eliminates double keying for staff.



Streamlined operations: Utilise simple, action-oriented APIs to maintain monitoring lists and facilitate alert viewing within existing business processes.



Reduced manual effort: Eliminate rekeying and multiple application logons for frontline staff by building monitoring steps and data updates into automated processes or single key presses within existing systems.



Automated data updates: Receive updates on key data from industry sources and write automated workflows to ensure your own data is kept up to date automatically.

Ready to transform your business?

Take the next step towards smarter business monitoring.

Portfolio Monitoring is already in use with many of our clients, from major high street banks through to smaller SME clients.

Portfolio Monitoring is highly scalable and can handle 100 companies or 1,000,000 with equal ease.

The Portfolio Monitoring service processes data on hundreds of thousands of updates every week, demonstrating its proven value in improving client businesses.

It's ideal for businesses that need to track changes through automation, eliminate manual keying, and drive business change using key external data sources.

Discover how Portfolio Monitoring can help you:

- ✓ Improve workflow management
- Ensure data accuracy and alignment
- Make timely, informed decisions



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Let's talk

Talk to Equifax about taking the next step towards smarter business monitoring.

Speak to our experts