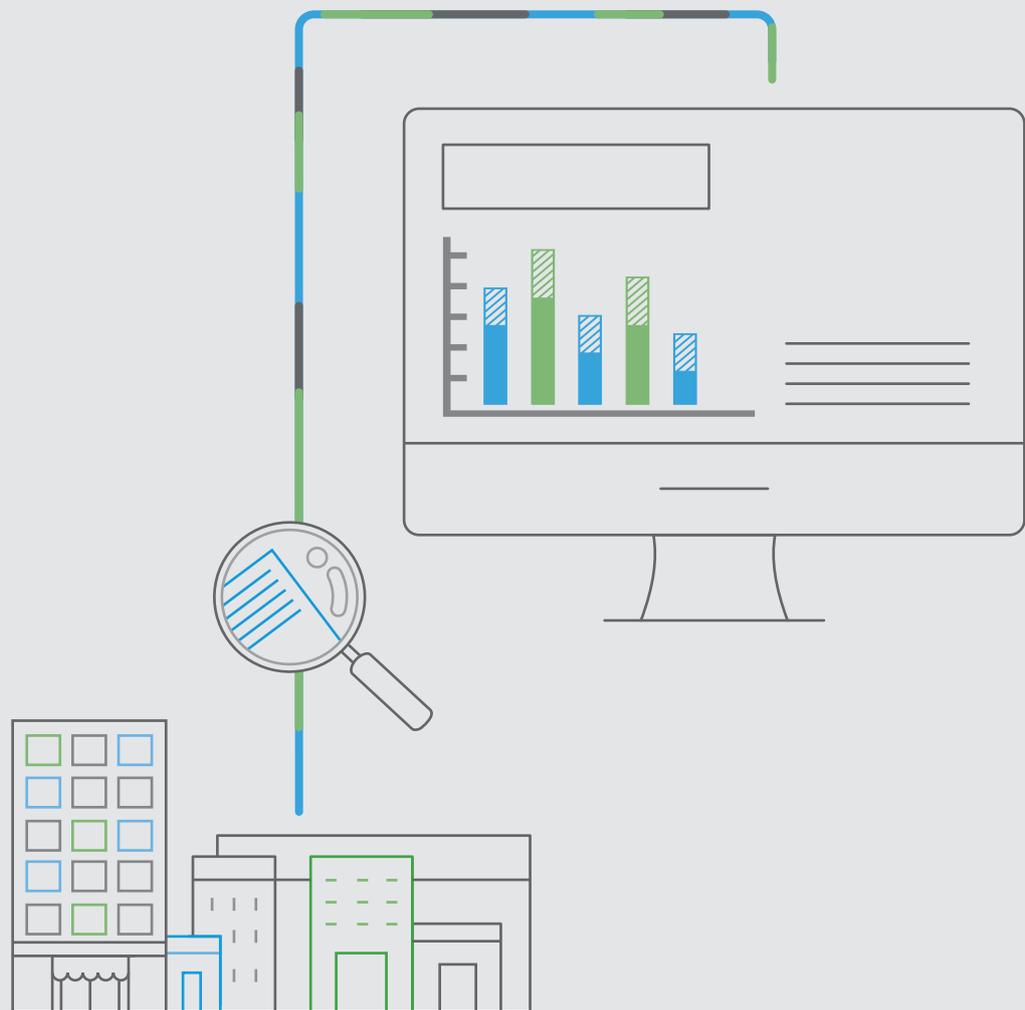


# Tracker

Up to the minute financial information on your customers, clients, suppliers and prospects.



[www.rsmuk.com/Tracker](http://www.rsmuk.com/Tracker)

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Tracker is simple and easy to use and has proved useful in supporting our marketing and business activities. The support team are very responsive and are eager to help to ensure we get the most value out of our subscription.

**Luke Soper, Sales Support Manager, Close Brothers Invoice Finance Limited**

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We have used various credit reporting systems for several years to help in our work but found RSM Tracker to be the best for our wide range of needs. We use it not only for credit checking but also for marketing & lead generation. We also find RSM very helpful in explaining to our new members how it works and can be used effectively.

**UK Business Advisors**

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# What is Tracker?

Tracker is a cloud-based software, developed by licensed insolvency practitioners, that transforms credit risk management, improves marketing and sales efforts, supports regulatory compliance and informs business decisions.

Tracker enables you to investigate and monitor the financial health of your existing and prospective business partners for alerts to emerging credit risks, so you can reduce your chance of bad debts and make more informed business decisions.

Tracker collates comprehensive data on UK companies and directors from many trusted sources into one integrated system. It gives you up to the minute financial information on your customers, clients, suppliers and prospects, including free downloads of Companies House documents.

You can view predictive credit scores for existing and prospective business partners that covers the next 12 months, informing your credit decisions and allowing you to assess prospects. You can generate qualified lists for marketing and sales and verify identities of your customers, clients or suppliers. Details on Tracker's key features are overleaf.

## Quick set up and full training and support

Being cloud-based enables quick set up of Tracker and access at desks across your organisation; for use by teams across credit control onboarding, right through to sales and marketing.

The system is simple and highly intuitive, offering a short learning curve for users. Our dedicated support team also provide full free training, online and on-site, and offer technical support.

## Who can benefit from Tracker?

Banks, utilities, SMEs and other organisations use Tracker to monitor individuals, sole traders, companies and groups – with over 2.5 million searches conducted in the last two years.

Just a few of our clients include:

**Barker Brettell**  
Intellectual Property

 **Close Brothers**  
Invoice Finance

**UKBA**<sup>TM</sup>  
UK Business Advisors

# Key features

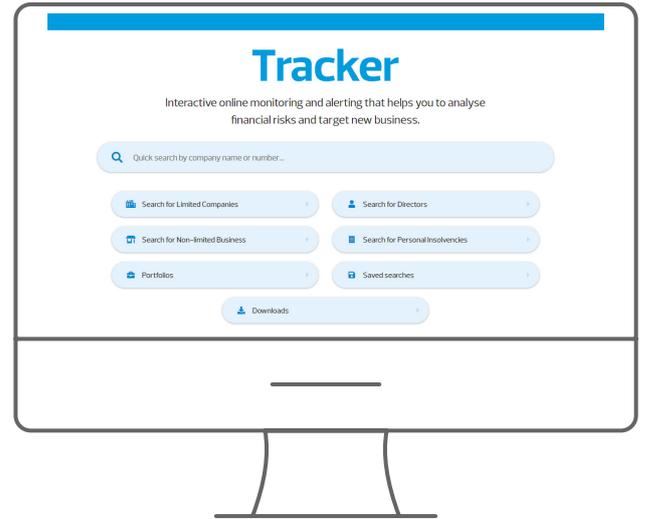
## Company search

### Summaries of financial health

Tracker gives you unlimited searches on UK quoted businesses, sole traders, limited companies and directors for at-a-glance company summaries of crucial information. It provides 12-month predictive company credit scores and free downloads of Companies House documents. It enables you to correct errors or omissions in your own portfolio and make more informed business decisions.

### Tracker's comprehensive information includes:

- company numbers;
- company address;
- key financials and documents;
- company structures;
- directors and shareholders;
- charges;
- and more.



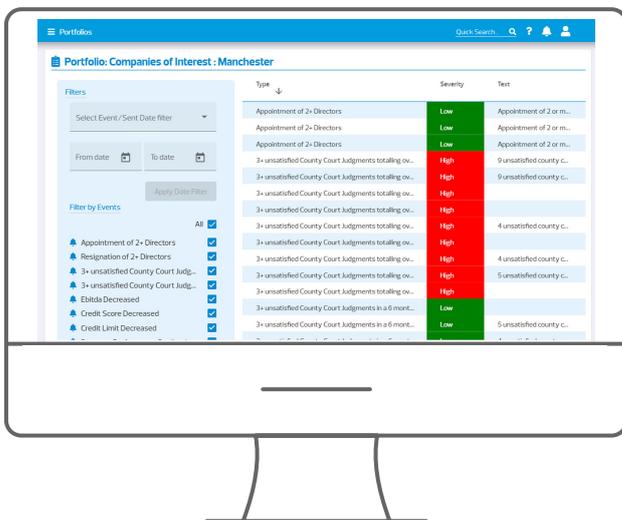
## Credit alerts

### Custom live alerts on companies or directors

Tracker enables dynamic monitoring of companies, directors and groups for custom alerts to a range of business events. Tracker can alert to something as simple as a change of address to something as serious as a County Court Judgement, empowering you to act rapidly on emerging risks or opportunities.

### Tracker's advanced monitoring capabilities include:

- change of address;
- director assignments or resignations;
- changes in credit score;
- appointment of liquidators;
- petitions;
- and many more indicators a debtor may not be able to pay you.



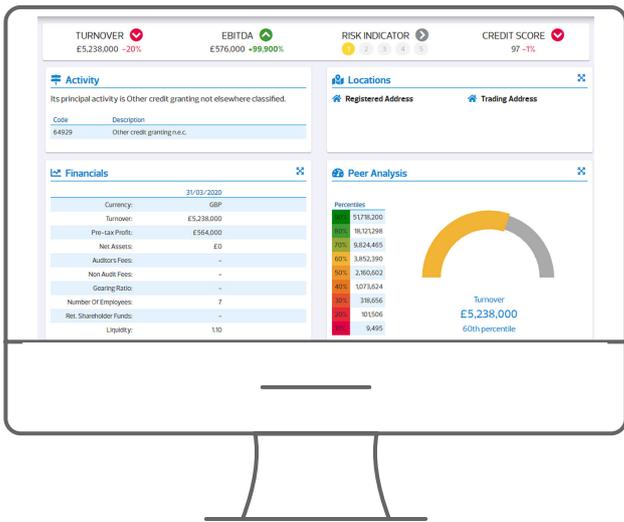
Company data exports

Qualified company lists and custom exports

Tracker can generate qualified sales and marketing target lists and allows you to export your results, after selecting relevant details, allowing you to share crucial information with teams in your organisation.

You can generate lists of companies based on vast search criteria, including;

- company details;
- adverse activity;
- directors;
- and more.



Onboarding and 'know your customer' functionality

Customer verification checks

Tracker provides the ability to perform due diligence checks on new clients to support onboarding processes and enable streamlined reviews on your customers, clients or suppliers to verify their identity. Users benefit from future bespoke alerts to support 'know you customer' processes and in-life management of clients.

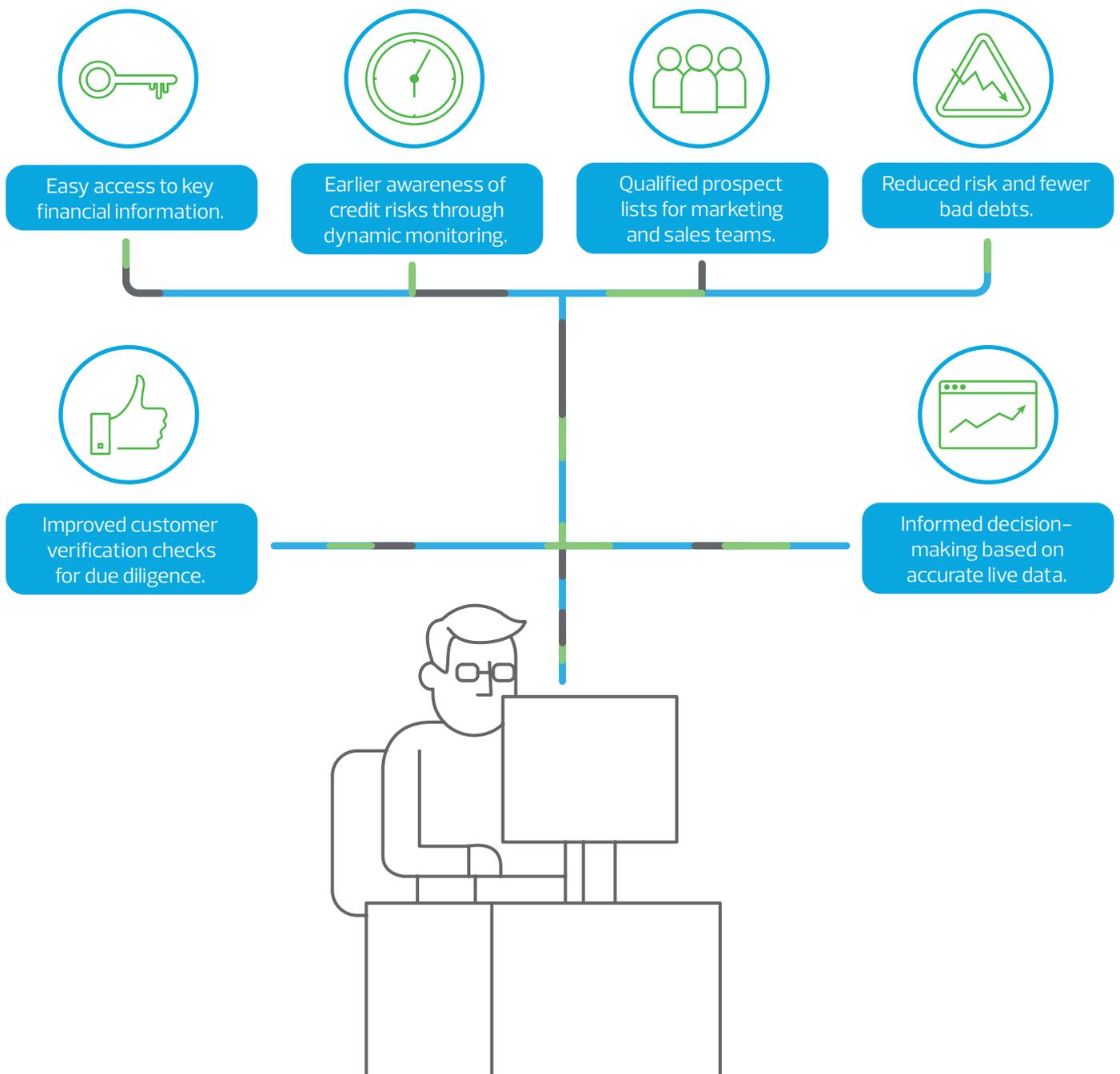
Customer search screens against domestic and international databases and helps you to:

- verify customer identity immediately; and
- monitor future key changes.



# Key benefits

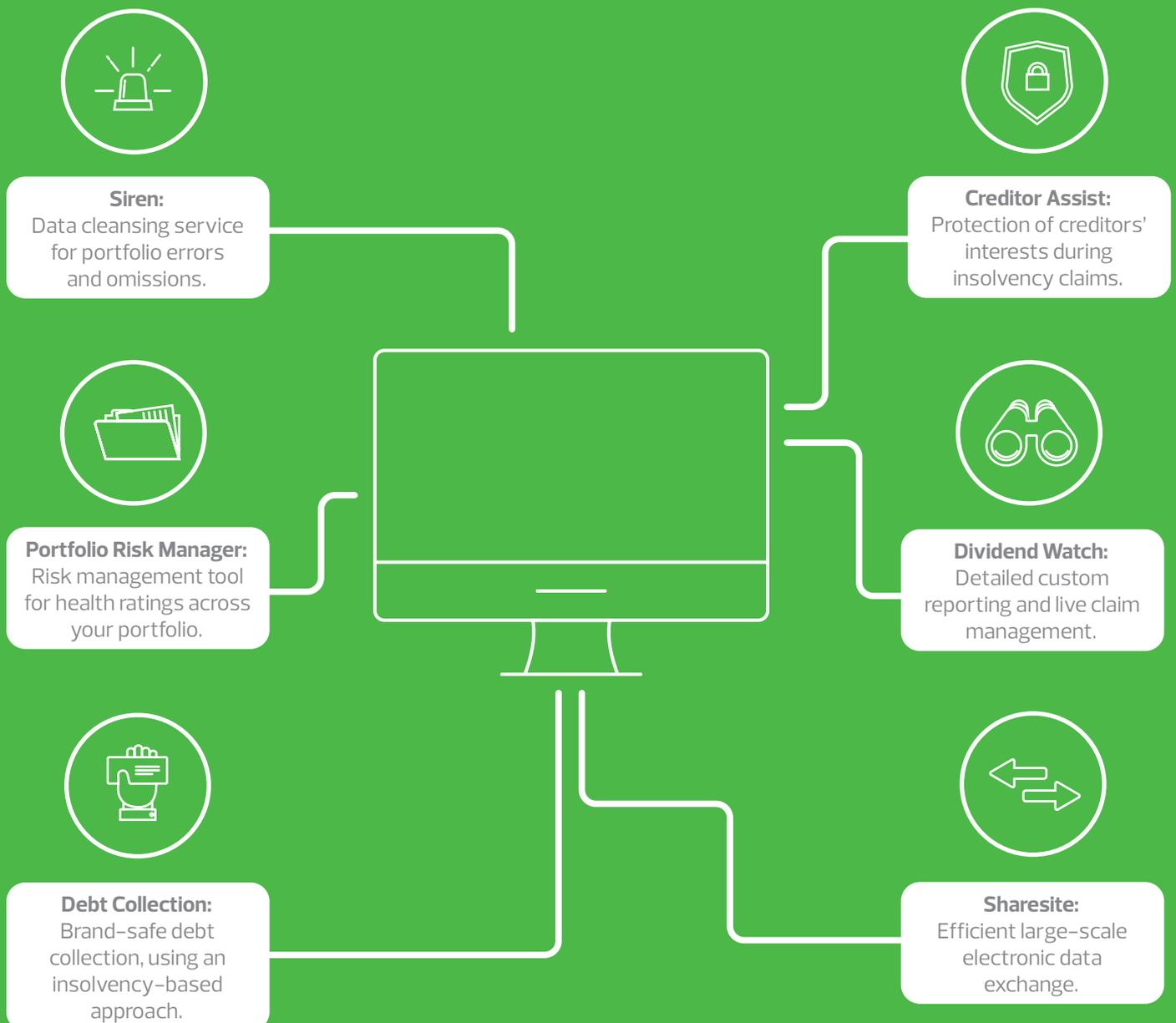
Tracker gives you up-to-the-minute financial information on your customers, clients, suppliers and prospects. It provides better business risk management and a wide range of benefits.



# About RSM and our creditor solutions team

RSM is a leading provider of audit, tax and consulting services to middle market leaders, globally. We are the seventh largest UK accountancy firm with over 3,650 partners and staff working across 33 offices in the UK.

Tracker is part of a suite of products and services that make up our wider creditor solutions offering. We understand the challenges facing risk teams and to provide our clients with the assurance they need in this rapidly changing landscape, we provide full advisory support underpinned by our nationwide Licenced Insolvency Practitioners. We work with our clients to better understand the pressures faced by their customers and to optimise their response to adverse circumstances. As part of this wider support we also create tailored collection strategies to mitigate losses and support recoveries in both pre and post insolvency situations. Contact us to find out more about our related offering.



## Contact us

For questions on Tracker or to arrange a free demonstration:

### Tracker support

**T:** +44 (0)20 7448 7725  
support@tracker-online.com  
www.rsmuk.com/Tracker

For more on creditor solutions:

### Keith Marshall

Partner  
**T:** 07818 435462  
keith.marshall@rsmuk.com

### Steve Walsh

Director  
**T:** 07786 857999  
steve.walsh@rsmuk.com

## rsmuk.com

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