



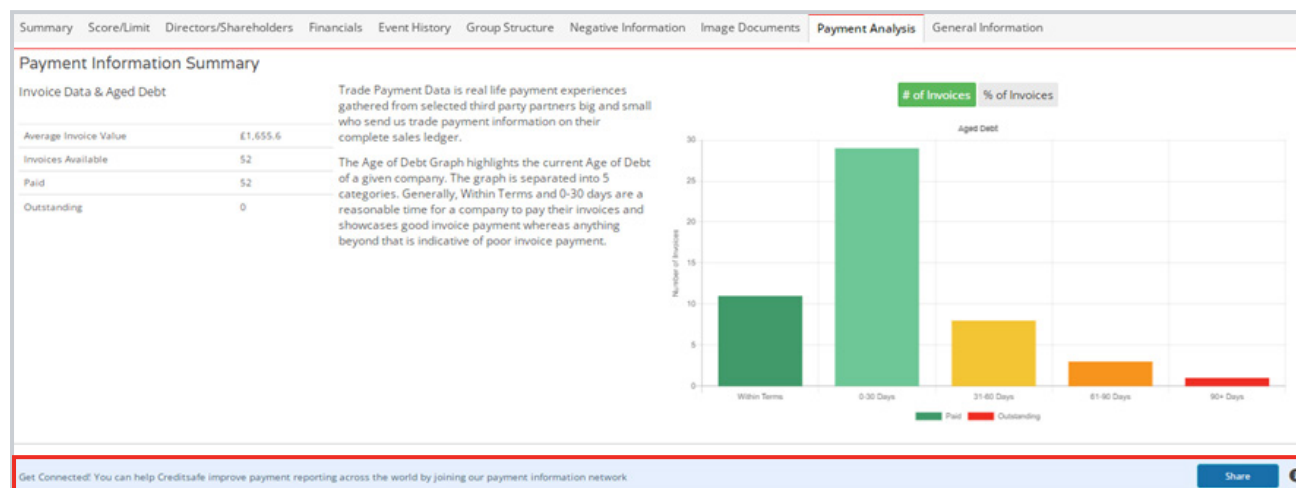
TRADE PAYMENT DATA:

Sharing your data with Creditsafe



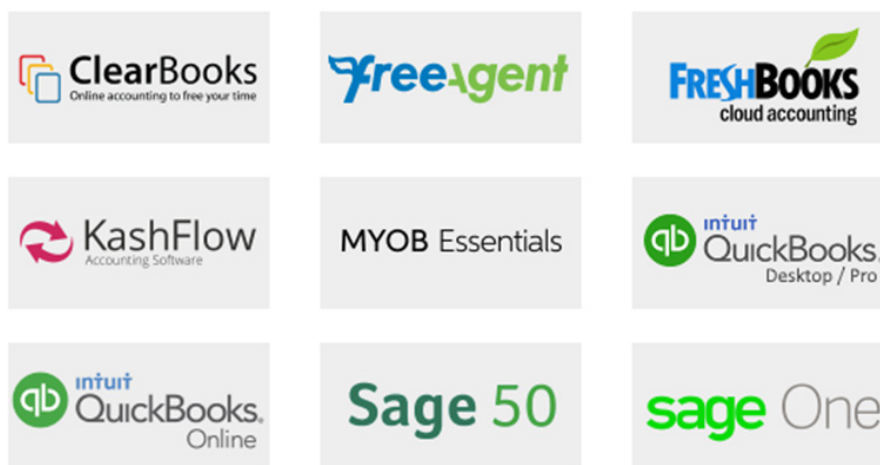
How can I share payment performance on my customers?

We have introduced the new data sharing button within the Creditsafe payment analysis tab to allow the user to contribute towards our payment information network directly. By actioning this, you are encouraging the enhancement of payment analysis for over 1,000,000 companies in just one click.



What accounts packages are compatible?

If you operate on the following listed accounts systems, you can instantly merge your sales ledger with Creditsafe:



If your accounts package is not listed above, please contact us on 02920 856 709 or alternatively [click here](#) to receive a call back.

After clicking 'Share', what happens next?

The following message will be displayed to you:

Share Your Payment Data

Creditsafe's shared data programme utilises real time payment experiences, alongside the score card. For more information, please see the [Payment Information Help Hub](#) page

If you'd like to contribute, simply click the 'Share Data' button to link your customer and transaction data to the Creditsafe universe

Share Data

'Share Data' will present you with the steps to link your accountancy software and the status of the information.

Finish Linking Your Accounting Software With Creditsafe			Manage	
Accounting Package	Last Updated	Status		
	01/01/0001		Start Sharing	

Once you have clicked 'Start Sharing' you will be asked to select your accounting system.

Help

Link your accounts

You will be asked to log in to your accounts in order to authorize the link.

Connect your Accounting Software

Step 1 of 4

Overview

We keep your data secure
Learn more

Exit

Select your accounting platform

Start typing...

sage Accounting

FreshBooks

freeagent

ClearBooks

KashFlow

QuickBooks

Skip →

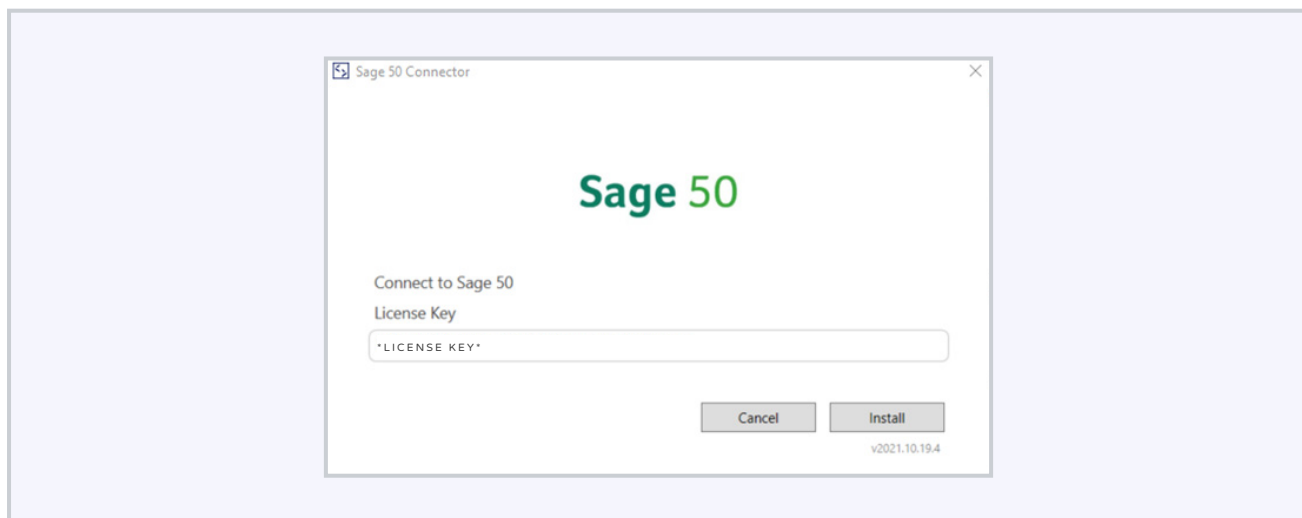
Sage 50 Users

I: Please remember that this will require the user to be logged into the computer where Sage 50 is installed, and to read the steps carefully before continuing with the process.

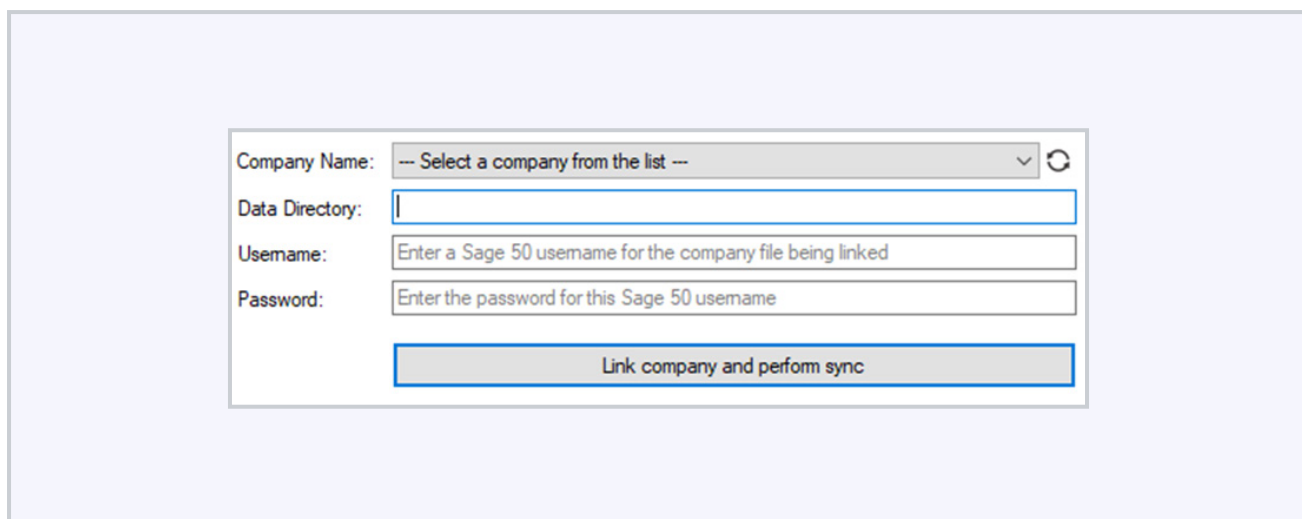
The screenshot shows a two-pane interface. The left pane is titled 'Link your accounts' and includes a 'Help' icon, a progress indicator for 'Step 2 of 4', an 'Overview' link, and a security statement 'We keep your data secure' with a 'Learn more' link. The right pane is titled 'Connect to Sage 50 (UK)' and includes 'Back' and 'Exit' links. It explains that the user will be asked to connect their Sage 50 (UK) account and authorise Creditsafe UK access to specific data. A list of data types includes 'Accounts receivable information', 'Accounts payable information', and 'Financial summary information'. At the bottom, there is a disclaimer about data access and a 'Next' button.

The screenshot shows a 'Sage 50cloud' page with a white background. It instructs the user to download an offline connector to connect to Sage 50cloud. It also states that after installation, the user will be asked to enter a license key. There is a text input field labeled '*LICENSE KEY*' with a green icon to its right. Below the input field is a prominent green 'Download Connector' button.

To link your Sage 50 data, a download will appear at the bottom of the page after clicking 'Download Connector' in the listed software. Open and run the connector, and paste in the license key as shows:

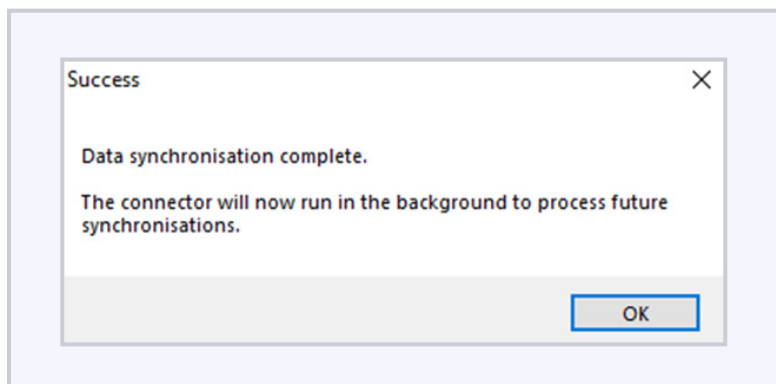


Paste in the data directory (this can be found listed next to the required company just after logging into Sage 50), or choose the specific company you want. Please type in the 'manager' username and password for Sage and click 'Link company and perform sync' to start the synchronisation. You will also be asked to confirm your chosen company is correct.



I: For larger companies this can take up to an hour, please leave the connector to run in the background and allow time for the connector if this is the case.

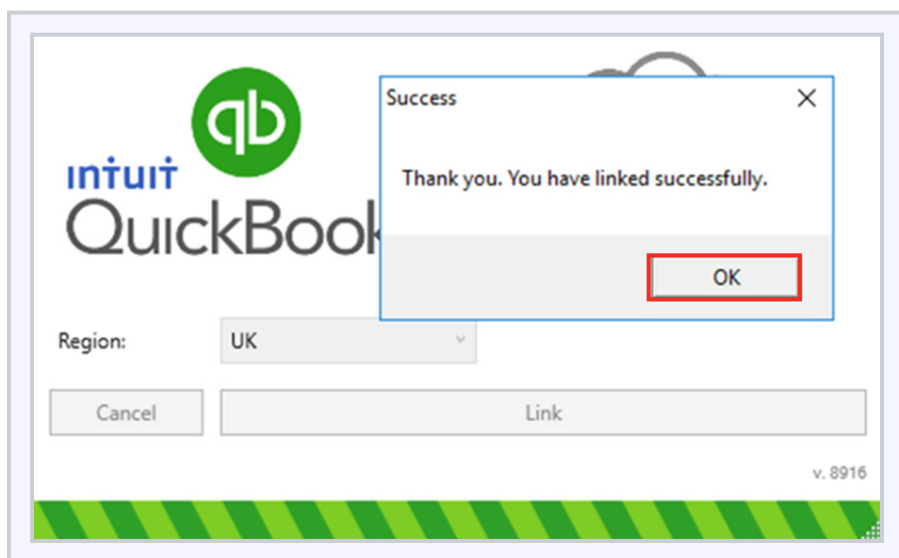
When the process has completed the following notice will be displayed and you will be taken through to the Creditsafe monitoring page.



Quickbooks Desktop Users

I: This link supports the UK, Canadian and US version of Quickbooks Desktop that were released in the last 5 years, and is designed to work in the single user mode where only one Windows user is logged in. Please also ensure that this is being installed on a Windows computer as the connector will not run on a Mac. Make sure you are logged into the company you wish to link to Creditsafe before making the connection. After selecting Quickbooks from the options, and follow the steps provided.

Allow up to 30 minutes for the link to initially complete as historic data needs plenty of time. When the process has completed, the following window will show.



Cloud-Based Packages

To sync accounts that are stored on the cloud, such as Quickbooks Online, Sage One, Kashflow, Freshbooks, Free Agent, MYOB and Clearbooks, you will need to be logged in if not already to the company you intend to share with, and will be asked to continue.

The pending interval for all data that completes the sync will take up to 2 business days to be verified once matched up to the database and you will be notified when your company's data is live.

GET IN TOUCH

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