

Portfolio Insight - Commercial Monitoring

Changes at a glance



Currently, Portfolio Insight provides basic commercial monitoring functionality in which you're able to receive alert notifications on entities you've opted to monitor.

We've recently released our new and improved Commercial Monitoring solution, and the good news for Portfolio Insight users is that we've applied key updates and enhancements to monitoring within Portfolio Insight – so you can now benefit from faster alerts, improved monitoring functionality and more.

What's changed?

Enjoy new ease of use and added monitoring functionality to your Portfolio Insight Profiles such as:

- **New user interface** – Complete redesign with modern look and feel interface.
- **Faster alerts** – Receive alerts on entities you monitor close to real time as they are updated within the bureau.
- **Ease of use functionality** – Changes within the UI allow large teams to efficiently manage their monitoring and choose what they want to see.



You'll have access to new monitoring features next time you log in

As a valued Portfolio Insight customer, we're giving you access to the new PI Alerts PLUS solution for free – so next time you log in, you'll notice a few changes for the better.

If you'd like to continue using after this trial period has ended, contact your account manager to discuss pricing. Alternatively, you can revert to using an improved version of PI Alerts.



More alert
triggers



Email notifications
for Alerts



Email summary
for alerts

- **More alert triggers** - Increased number of changes that you can monitor going from about 40 ASIC forms to about 200 forms among other monitoring options including wind-ups.
- **Email notifications for alerts** - Receive notification of your monitoring alert via an email linked to your profile. You can also choose to receive summary alerts if you have a very large book of customers, saving time and increasing operational efficiency.
- **Email summary for alerts** – We've added the functionality to receive summary emails for alerts as well. This means that on top of receiving emails for each alert you can set up your profile to receive a summary of the alerts on all the entities that you monitor.

Talk to your account manager today to have PI Alerts PLUS enabled on your Portfolio Insight Account

Will I be charged for the new monitoring enhancements?

The trial of PI Alerts PLUS available through the new Commercial Monitoring Solution will be free for a limited time. Once the trial period has finished you will automatically be moved to PI Alerts standard functionality. This basic monitoring service is free and included within Portfolio Insight, as it is today.

You are able to continue to utilise PI Alerts PLUS on your PI Insight Account after the trial period at an additional cost.

To access PI Alerts PLUS on your Portfolio Insight account, talk with your account manager to discuss your pricing options.

Important note - Any entities added to 'Core' Monitoring profiles will be charged separately.

To find out more, contact your illion Account Manager or our Client Services Team on 13 23 33 and clientservices@illion.com.au

