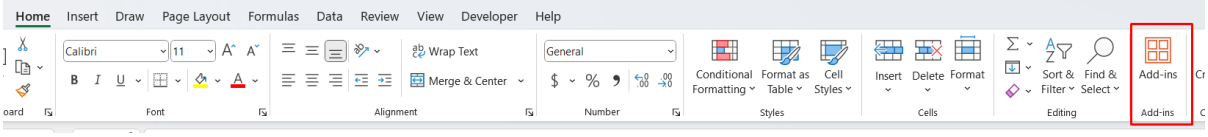
# HELP CENTER: EXCEL ADD-IN

Welcome to the CreditRiskMonitor Excel Add-In Help Center, your go-to resource for harnessing the full potential of our tool. This document provides comprehensive guidance on using our Excel Add-In functions effectively, practical use cases for integrating real-time data into your financial analysis, and best practices to streamline your workflow. Whether you're a novice or a seasoned Excel user, this guide will empower you to make informed decisions and optimize your credit risk monitoring processes.

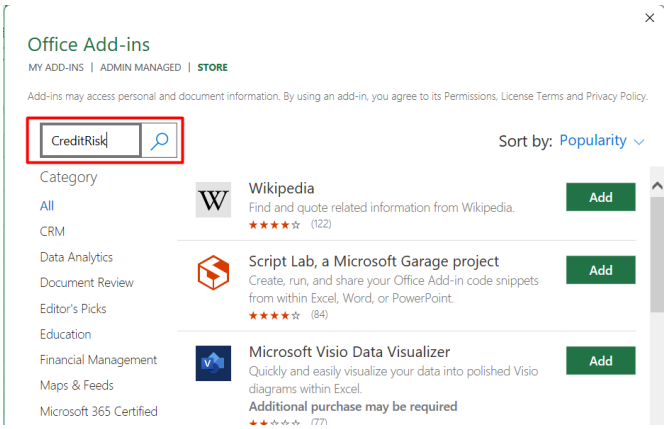
If you have any questions, concerns, or suggestions, please do not hesitate to send an email to ExcelAddin@creditriskmonitor.com.

## ADD-IN INSTALLATION

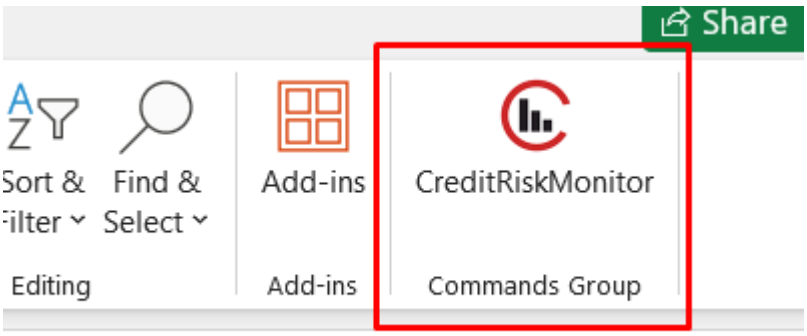
1. Go to Home Tab and click on “Add-ins” and “More Add-ns"




2. Search for CreditRiskMonitor




3. Click on the Add-In and Install it
4. Go back to the Home Tab, and click on the CreditRiskMonitor to the far right. Enter your credentials and start using our “=CRMZ” functions.

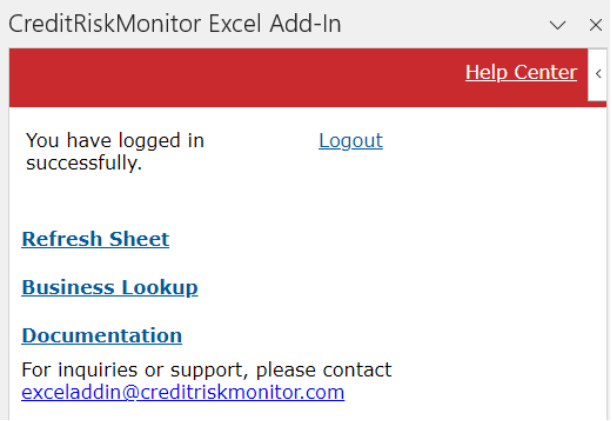


## USING ADD-IN MENU FUNCTIONALITIES

### Refresh Sheet

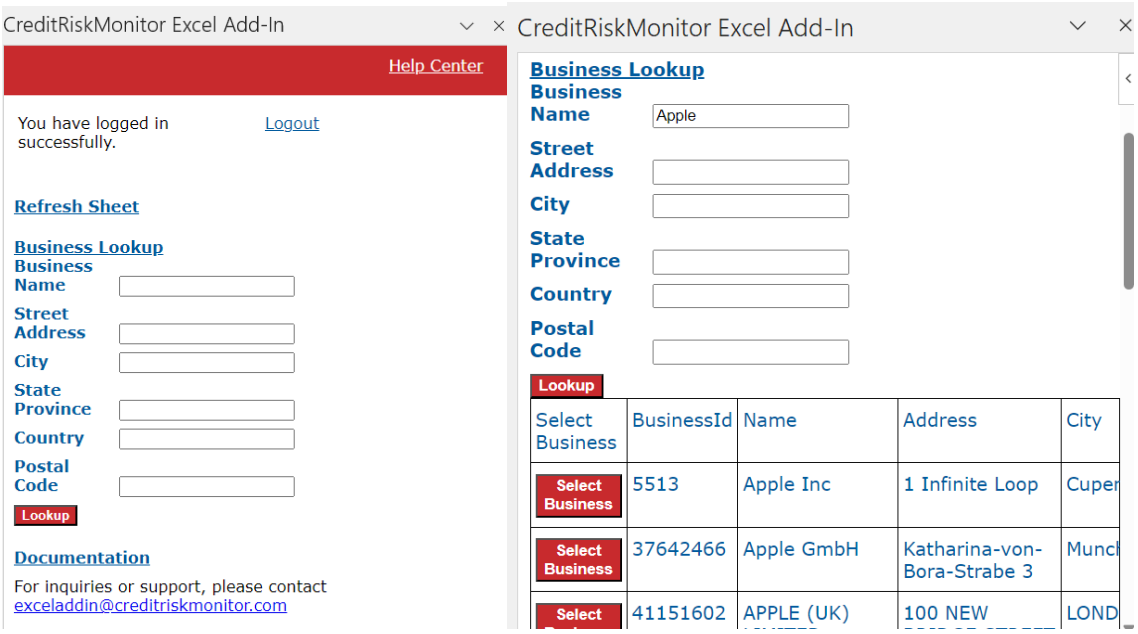
After logging in, click "Refresh Sheet" to update all your functions across the spreadsheet with the most recent data from the website.

**Best Practice:** Perform this action every time you log in.




### Business Lookup

Use this functionality to look up businesses just like you do on the website. Fill out the business details and hit 'Lookup' to retrieve the results.




Click "Select Business" to automatically input that 'BusinessId' into your functions that do not have a 'BusinessId' set up.

## Functions

Use this section to access the details for each function available in the CreditRiskMonitor Excel Add-in.

## COMMON DATA INPUTS

This section shows the most common inputs that you will find in the functions:

| INPUTS | DESCRIPTION |
|---|---|
| **BUSINESSID** | This field represents the Business identificator (ID) assigned by CreditRiskMonitor, that you want to pull information from. In certain cases, providing the BusinessID can be optional.<br>The ID can be a number like 2889 or a cell reference like A2. |
| **CUSTOMERID** | This field denotes the unique identifier of the customer, applicable when the user is a Trade Provider. These are identifiers from your internal accounts receivable system which can be used directly in these functions. In some cases, this field can be optional.<br>The ID can be a number like 2889 or a cell reference like A2. |
| **SUPPLIERID** | This field signifies the supplier/vendor's unique identifier when a Supplier List is utilized. These are identifiers from your internal systems which can be used directly in these functions.<br>While optional, providing SupplierId offers specificity in data retrieval. It requires a SupplyChainMonitor subscription. |
| **FIELDS** | This refers to the list of data field names to be returned. It can either be a comma-separated string or an Excel range. While this input is optional, omitting it will return all available fields for a specific function.<br>To know all the data fields of a function please use the function CRMZ.FIELDS and follows the respective function name. For example, to see the fields available for the CRMZ.BUSINESS.DETAILS() function, type CRMZ.FIELDS.BUSINESS.DETAILS(). |
| **SHOWHEADERS**<br>*OPTIONAL* | It shows the fields' headers. You can choose between '1' or 'TRUE' to show the headers, or '0' or 'FALSE' to not show the headers. The default value is '1', indicating that headers will be shown by default. |

## BUSINESS/CUSTOMER/SUPPLIER DETAILS

### DETAILS function

The **BUSINESS/CUSTOMER/SUPPLIER DETAILS** function pulls information from 56 possible fields for a record. You can choose which fields you want to pull by typing individual fields or selecting a cell range.

- **Syntax**

**=CRMZ.BUSINESS.DETAILS(BusinessId, [Fields], [ShowFields])**

**=CRMZ.CUSTOMER.DETAILS(CustomerId, [Fields], [ShowFields])**

**=CRMZ.SUPPLIER.DETAILS(SupplierId, [Fields], [ShowFields])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **Fields**<br>*optional* | The specific fields from this function you want to use. This function pulls 56 fields for a Business ID. You can mention the exact field like "Address1", a cell reference like A2, a cell range like A2:C2, or a comma-separated string like "Address1, CityName, StateProvinceName" . The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

➢ Get high-level information for a specific business

a. Find the business IDs you're interested in (*See item 2 for multiple ways to find the IDs*).
b. Paste the business IDs in any column to reference them in the formula.
c. Choose the business details fields you want to use (*See FIELDS function for an easy way to get this information*) or simply type the desired one.
d. If you want to switch businesses from rows to columns, you can use the TRANSPOSE function

B2 =CRMZ.BUSINESS.DETAILS(A2,$B$1:$L$1,0)

| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | BusinessId | Name | Address1 | CityName | StateProvinceName | PostalCode | CountryName | PhoneNumber | TickerSymbol | Employees | FriskScore | ZScore |
| 2 | 2889 | Microsoft Corp | One Microsoft Way | REDMOND | WA | 98052-6399 | United States | (425) 882-8080 | MSFT | 221000 | 10 | 3.8811 |
| 3 | 5513 | Apple Inc | One Apple Park Way | CUPERTINC | CA | 95014 | United States | (408) 996-1010 | AAPL | 161000 | 10 | 2.7871 |

- BusinessId: Referenced on cell A2
- Fields: Referenced on the locked range B2:L1
- ShowHeaders: '0' as it already has the headers/fields referenced

B2 =CRMZ.BUSINESS.DETAILS(A2,"Name",0)

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | BusinessId | Name | | | |
| 2 | 2889 | Microsoft Corp | | | |
| 3 | 5513 | Apple Inc | | | |

- BusinessId: Referenced on cell A2
- Fields: “Name”
- ShowHeaders: ‘0’

A1 =CRMZ.BUSINESS.DETAILS(2889)

| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Name | ParentBusinessId | ParentBusinessName | BusinessId | Address1 | CityName | StateProvinceName | PostalCode | CountryName | PhoneNumber | FaxNumber | EmailAc |
| 2 | Microsoft Corp | | | 2889 | One Microsoft Way | REDMOND | WA | 98052-6399 | United States | (425) 882-8080 | (425) 706-7 | msft@m |
| 3 | | | | | | | | | | | | |

- BusinessId: 2889
- Fields: ‘empty’, which pulls every field for that business ID
- ShowHeaders: ‘empty’, which shows the headers on row 1

C2 =TRANSPOSE(CRMZ.BUSINESS.DETAILS(C1,,0))

| | A | B | C |
|---|---|---|---|
| 1 | | 2889 | 5513 |
| 2 | Name | Microsoft Corp | Apple Inc |
| 3 | ParentBusinessId | | |
| 4 | ParentBusinessName | | |
| 5 | BusinessId | 2889 | 5513 |
| 6 | Address1 | One Microsoft Way | One Apple Park Way |
| 7 | CityName | REDMOND | CUPERTINO |
| 8 | StateProvinceName | WA | CA |
| 9 | PostalCode | 98052-6399 | 95014 |
| 10 | CountryName | United States | United States |
| 11 | PhoneNumber | (425) 882-8080 | (408) 996-1010 |
| 12 | FaxNumber | (425) 706-7329 | |
| 13 | EmailAddress | msft@microsoft.com | investor_relations@apple.com |
| 14 | TradingStatus | A | A |
| 15 | IncorporatedDate | 1993-09-22 | 1977-01-03 |

- BusinessId: Referenced on cell C1
- Fields: ‘empty’, so all of them are pulled. Column A represents the fields that had been previously pasted.
- ShowHeaders: ‘0’, which does not show the headers
- Using the “Transpose” Excel function to show the results vertically.

## BUSINESS/CUSTOMER/SUPPLIER FINANCIAL DETAILS

### BUSINESS FINANCIALS function

The **BUSINESS/CUSTOMER/SUPPLIER FINANCIAL DETAILS** function pulls financial information from 290 possible fields for a business. You can specify Annual or Interim financials alongside how many time periods. You can choose which financial data you want to pull by typing individual fields or selecting a cell range.

- **Syntax**

**=CRMZ.BUSINESS.FINANCIALS([BusinessId], [Type], [Periods], [StandardQuarter], [StandardYear], [SortOrder], [Fields], [ShowHeaders])**

**=CRMZ.CUSTOMER. FINANCIALS ([CustomerId], [Type], [Periods], [StandardQuarter], [StandardYear], [SortOrder], [Fields], [ShowHeaders])**

**=CRMZ.SUPPLIER. FINANCIALS ([SupplierId], [Type], [Periods], [StandardQuarter], [StandardYear], [SortOrder], [Fields], [ShowHeaders])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **Type**<br>*optional* | The type of financials: "Annual", "Interim" (on a quarterly basis), or "YTD" (year-to-date). You can type them in the format or use a cell reference like A2.<br>If you want quarter financials, use "Interim". |
| **Periods**<br>*optional* | Given the type, you can choose how many time periods you want to get. For instance, type = "Annual" and period = "2" will result in the last two most recent annual financials. |
| **StandardQuarter**<br>*optional* | Specifies the quarter of the financial statements to return (valid options: 1, 2, 3, 4). Applicable only when the Type of financials is set to "Interim". |
| **StandardYear**<br>*optional* | Specifies the year of the financial statements to return (format: YYYY, e.g., 2023). |
| **SortOrder**<br>*optional* | The order of how the StandardYear and StandardQuarter are showed in the results (valid options are "D" = Descending and "A" = Ascending. The default option is "D". |
| **Fields**<br>*optional* | The specific fields from this function you want to use. This function pulls 290 financial fields for a Business ID. You can mention the exact field like "Inventory", a cell reference like A2, a cell range like A2:C2 or a comma-separated string like "GrossMarginOfSales, OperatingMarginOfSales". The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

➢ Get high-level financial information for a specific business

a. Find the business IDs you're interested in (*See item 2 for multiple ways to find the IDs*).
b. Paste the business IDs in any column to reference them in the formula.
c. Choose between "Annual" or "Interim" for Type.
d. Choose how many periods you want to get.
e. Choose the business details fields you want to use (*See FIELDS function for an easy way to get this information*) or simply type the desired one.

A2 =CRMZ.BUSINESS.FINANCIALS(2889,"Annual",2)

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | | | | | | | | | | | | | | |
| 2 | StandardY | StandardQ | Statement | Statement | PeriodEnd | CurrencyC | NumberOf | QuarterlyZ | ZScore | BalanceAc | BalanceAu | BalanceAu | BalanceSo | BalanceSo |
| 3 | 2023 | 0 | 2023 | 0 | 6/29/2023 | USD | 221000 | 4.7083 | 4.7083 | U.S. GAAP | Deloitte & | Unqualifie | 10-K | 7/26/2023 |
| 4 | 2022 | 0 | 2022 | 0 | 6/29/2022 | USD | 221000 | 4.5097 | 4.51 | U.S. GAAP | Deloitte & | Unqualifie | 10-K | 7/27/2022 |

A2 =CRMZ.BUSINESS.FINANCIALS(2889,"Interim",4)

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | | | | | | | | | | | | | | |
| 2 | StandardY | StandardQ | Statement | Statement | PeriodEnd | CurrencyC | NumberOf | QuarterlyZ | ZScore | BalanceAc | BalanceAu | BalanceAu | BalanceSo | BalanceSo |
| 3 | 2023 | 4 | 2024 | 2 | 12/30/202 | USD | | 2.8357 | 3.8811 | U.S. GAAP | | | 10-Q | 1/29/2024 |
| 4 | 2023 | 3 | 2024 | 1 | 9/29/2023 | USD | | 3.6177 | 4.6248 | U.S. GAAP | | | 10-Q | 10/23/202 |
| 5 | 2023 | 2 | 2023 | 4 | 6/29/2023 | USD | | 3.663 | 4.7083 | U.S. GAAP | | | 10-K | 7/26/2023 |
| 6 | 2023 | 1 | 2023 | 3 | 3/30/2023 | USD | | 3.774 | 4.8753 | U.S. GAAP | | | 10-Q | 4/24/2023 |

C3 =CRMZ.BUSINESS.FINANCIALS(A3,"Annual",1,,,,$C$2:$E$2,0)

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | | | | | | |
| 2 | BusinessId | Name | StandardYear | GrossMarginOfSales | OperatingMarginOfSales | |
| 3 | 2889 | Microsoft Corp | 2023 | 68.9201 | 41.7587 | |
| 4 | 5513 | Apple Inc | 2023 | 68.9201 | 41.7587 | |

C3 =CRMZ.BUSINESS.FINANCIALS(A3,"Annual",3,,,,$C$2:$E$2,0)

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | | | | | | |
| 2 | BusinessId | Name | StandardYear | GrossMarginOfSales | OperatingMarginOfSales | |
| 3 | 2889 | Microsoft Corp | 2023 | 68.9201 | 41.7587 | |
| 4 | | | 2022 | 68.4017 | 42.0043 | |
| 5 | | | 2021 | 68.9258 | 41.5871 | |

B3 =TRANSPOSE(CRMZ.BUSINESS.FINANCIALS(B1,"Interim",5,,,,$A$3:$A$6,0))

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | BusinessId | 2889 | | | | |
| 2 | | | | | | |
| 3 | StandardYear | 2023 | 2023 | 2023 | 2023 | 2022 |
| 4 | StandardQuarter | 4 | 3 | 2 | 1 | 4 |
| 5 | GrossMarginOfSales | 68.3602 | 71.1556 | 70.1098 | 69.4875 | 66.8455 |
| 6 | OperatingMarginOfSales | 43.3263 | 47.5768 | 43.1633 | 42.2877 | 38.6657 |

## SCORE HISTORY

### BUSINESS SCORE HISTORY function

The **BUSINESS/CUSTOMER/SUPPLIER SCORE HISTORY** function pulls score information from 8 fields for a business. You can specify the Start and/or End Dates of the monthly risk scores.

You can choose which score you want to pull by typing individual fields or selecting a cell range.

- **Syntax**

**=CRMZ.BUSINESS.SCOREHISTORY([BusinessId], [StartDate], [EndDate], [Fields], [ShowHeaders])**

**=CRMZ.CUSTOMER.SCOREHISTORY([CustomerId], [StartDate], [EndDate], [Fields], [ShowHeaders])**

**=CRMZ.SUPPLIER.SCOREHISTORY([SupplierId], [StartDate], [EndDate], [Fields], [ShowHeaders])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **StartDate**<br>*optional* | Specifies the start date of the risk scores to display, formatted as YYYY/MM. The default option is the current date. |
| **EndDate**<br>*optional* | Specifies the end date of the risk scores to display, formatted as YYYY/MM. The end date must be at least 45 days apart from the start date. The default option is one year ago. |
| **Fields**<br>*optional* | The specific fields from this function you want to use. This function pulls 8 score fields for a Business ID. You can mention the exact field like "FRISKScore", a cell reference like A2, a cell range like A2:C2 or a comma-separated string like "FRISKScore, PAYCEScore".<br>The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

➢ Get high-level score information for a specific business

a. Find the business IDs you're interested in (*See item 2 for multiple ways to find the IDs*).
b. Paste the business IDs in any column to reference them in the formula.
c. Type the StartDate and/or EndDate of the score information do you want to pull. This step if optional, it will return the latest 13 month history by default.
d. Choose the business details fields you want to use (*See FIELDS function for an easy way to get this information*) or simply type the desired one.

A3 =CRMZ.BUSINESS.SCOREHISTORY(B1)

| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | BusinessId | 2889 | | | | | | |
| 2 | | | | | | | | |
| 3 | FRISKScore | DBTScore | ZScore | PAYCESco | FSRScore | Year | Month | Quarter |
| 4 | 10 | 9 | 4.8405 | | | 2023 | 3 | 0 |
| 5 | 10 | 9 | 4.8753 | | | 2023 | 4 | 1 |
| 6 | 10 | 9 | 4.8753 | | | 2023 | 5 | 1 |
| 7 | 10 | 9 | 4.8753 | | | 2023 | 6 | 1 |
| 8 | 10 | 9 | 4.7083 | | | 2023 | 7 | 2 |
| 9 | 10 | 9 | 4.7083 | | | 2023 | 8 | 2 |
| 10 | 10 | 9 | 4.7083 | | | 2023 | 9 | 2 |
| 11 | 10 | 9 | 4.6248 | | | 2023 | 10 | 3 |
| 12 | 10 | 9 | 4.6248 | | | 2023 | 11 | 3 |
| 13 | 10 | 9 | 4.6248 | | | 2023 | 12 | 3 |
| 14 | 10 | 9 | 3.8811 | | | 2024 | 1 | 0 |
| 15 | 10 | 9 | 3.8811 | | | 2024 | 2 | 0 |
| 16 | 10 | | 3.8811 | | | 2024 | 3 | 0 |

A3 =CRMZ.BUSINESS.SCOREHISTORY(B1,"01/31/2021","02/28/2023",,)

| | A | B | C | D | E | F | G | H | I | J |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | BusinessId | 2889 | | | | | | | | |
| 2 | | | | | | | | | | |
| 3 | FRISKScore | DBTScore | ZScore | PAYCESco | FSRScore | Year | Month | Quarter | | |
| 4 | 10 | | 4.8947 | | | 2021 | 1 | 0 | | |
| 5 | 10 | | 4.8947 | | | 2021 | 2 | 0 | | |
| 6 | 10 | | 4.8947 | | | 2021 | 3 | 0 | | |
| 7 | 10 | | 4.7276 | | | 2021 | 4 | 1 | | |
| 8 | 10 | | 4.7276 | | | 2021 | 5 | 1 | | |
| 9 | 10 | | 4.7276 | | | 2021 | 6 | 1 | | |
| 10 | 10 | | 4.6258 | | | 2021 | 7 | 2 | | |
| 11 | 10 | | 4.6258 | | | 2021 | 8 | 2 | | |
| 12 | 10 | 9 | 4.6258 | | | 2021 | 9 | 2 | | |
| 13 | 10 | 9 | 4.845 | | | 2021 | 10 | 3 | | |
| 14 | 10 | 9 | 4.845 | | | 2021 | 11 | 3 | | |
| 15 | 10 | 9 | 4.845 | | | 2021 | 12 | 3 | | |
| 16 | 10 | 9 | 5.0662 | | | 2022 | 1 | 0 | | |
| 17 | 10 | 9 | 5.0662 | | | 2022 | 2 | 0 | | |
| 18 | 10 | 9 | 5.0662 | | | 2022 | 3 | 0 | | |
| 19 | 10 | 9 | 4.7483 | | | 2022 | 4 | 1 | | |
| 20 | 10 | 9 | 4.7483 | | | 2022 | 5 | 1 | | |
| 21 | 10 | 9 | 4.7483 | | | 2022 | 6 | 1 | | |
| 22 | 10 | 9 | 4.51 | | | 2022 | 7 | 2 | | |
| 23 | 10 | 9 | 4.51 | | | 2022 | 8 | 2 | | |
| 24 | 10 | 9 | 4.51 | | | 2022 | 9 | 2 | | |
| 25 | 10 | 9 | 4.7324 | | | 2022 | 10 | 3 | | |
| 26 | 10 | 9 | 4.7324 | | | 2022 | 11 | 3 | | |
| 27 | 10 | 9 | 4.7324 | | | 2022 | 12 | 3 | | |
| 28 | 10 | 9 | 4.8405 | | | 2023 | 1 | 0 | | |
| 29 | 10 | | 4.8405 | | | 2023 | 2 | 0 | | |

B3 =TRANSPOSE(CRMZ.BUSINESS.SCOREHISTORY(B1,,,A3:A7,0))

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | BusinessId | 2889 | | | | | | | | | | | | |
| 2 | | | | | | | | | | | | | | |
| 3 | Year | 2023 | 2023 | 2023 | 2023 | 2023 | 2023 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2024 |
| 4 | Month | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 1 | 2 | 3 |
| 5 | Quarter | 0 | 1 | 1 | 1 | 2 | 2 | 2 | 3 | 3 | 3 | 0 | 0 | 0 |
| 6 | FRISKScore | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| 7 | ZScore | 4.8405 | 4.8753 | 4.8753 | 4.8753 | 4.7083 | 4.7083 | 4.7083 | 4.6248 | 4.6248 | 4.6248 | 3.8811 | 3.8811 | 3.8811 |
| 8 | | | | | | | | | | | | | | |

C2 =CRMZ.BUSINESS.SCOREHISTORY(A2,,,C1:E1,0)

| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | BusinessId | Name | DBTScore | Year | Month | | |
| 2 | 2889 | Microsoft Corp | 9 | 2023 | 3 | | |
| 3 | | | 9 | 2023 | 4 | | |
| 4 | | | 9 | 2023 | 5 | | |
| 5 | | | 9 | 2023 | 6 | | |
| 6 | | | 9 | 2023 | 7 | | |
| 7 | | | 9 | 2023 | 8 | | |
| 8 | | | 9 | 2023 | 9 | | |
| 9 | | | 9 | 2023 | 10 | | |
| 10 | | | 9 | 2023 | 11 | | |
| 11 | | | 9 | 2023 | 12 | | |
| 12 | | | 9 | 2024 | 1 | | |
| 13 | | | 9 | 2024 | 2 | | |
| 14 | | | | 2024 | 3 | | |
| 15 | | | | | | | |

- Build the FRISKScore history for multiple businesses at once
  a. Paste the last 13 months, including the current one on the first row.
     i. Tip: To make this dynamic and automated, use the formula DATE and TODAY for the current month (Cell O1), and work backward to the 13th month using the formula EDATE (Range C1:N1).

C2 =TRANSPOSE(CRMZ.SCOREHISTORY(A2,,,"FRISKScore",0))

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Business Id | Business Name | Oct-22 | Nov-22 | Dec-22 | Jan-23 | Feb-23 | Mar-23 | Apr-23 | May-23 | Jun-23 | Jul-23 | Aug-23 | Sep-23 | Oct-23 |
| 2 | 2889 | Microsoft Corp | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| 3 | 5513 | Apple Inc | 9 | 9 | 9 | 9 | 9 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
| 4 | | | | | | | | | | | | | | | |

C3 =TRANSPOSE(CRMZ.SCOREHISTORY(A3,,,$B$1,0))

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | | ZScore | | | | | | | | | | | | | |
| 2 | Business Id | Business Name | Oct-22 | Nov-22 | Dec-22 | Jan-23 | Feb-23 | Mar-23 | Apr-23 | May-23 | Jun-23 | Jul-23 | Aug-23 | Sep-23 | Oct-23 |
| 3 | 2889 | Microsoft Corp | 4.7324 | 4.7324 | 4.7324 | 4.8405 | 4.8405 | 4.8405 | 4.8753 | 4.8753 | 4.8753 | 4.7083 | 4.7083 | 4.7083 | 0 |
| 4 | 5513 | Apple Inc | 2.0732 | 2.0732 | 2.0732 | 2.278 | 2.278 | 2.278 | 2.4076 | 2.4076 | 2.4076 | 2.438 | 2.438 | 2.438 | 0 |

# SIC CODES

## BUSINESS SIC CODES function

The **BUSINESS/CUSTOMER/SUPPLIER SIC CODES** function pulls the primary and secondaries SIC Codes for a business. You can choose which field you want to pull by typing individual fields or selecting a cell range.

- **Syntax**

**=CRMZ.BUSINESS.SICCODES([BusinessId], [Fields], [ShowHeaders])**

**=CRMZ.CUSTOMER.SICCodes([CustomerId], [Fields], [ShowHeaders])**

**=CRMZ.SUPPLIER.SICCodes([SupplierId], [Fields], [ShowHeaders])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **Fields**<br>*optional* | The specific fields from this function you want to use. This function pulls 3 fields for a Business ID. You can mention the exact field like "Name", a cell reference like A2, a cell range like A2:C2 or a comma-separated string like "Name, Primary". The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

- Get the SIC Code information for a specific business
  a. Find the business IDs you're interested in (*See item 2 for multiple ways to find the IDs*).

b. Paste the business IDs in any column to reference them in the formula.
c. Choose the business details fields you want to use (*See FIELDS function for an easy way to get this information*) or simply type the desired one.

A4 =CRMZ.BUSINESS.SICCODES(2889)

| | A | B | C |
|---|---|---|---|
| 1 | BusinessId | 2889 | |
| 2 | Name | Microsoft Corp | |
| 3 | | | |
| 4 | Code | Name | Primary |
| 5 | 7372 | Prepackaged software | TRUE |
| 6 | 3577 | Computer peripheral equipment, not elsewhere classified | FALSE |
| 7 | 7375 | Information retrieval services | FALSE |
| 8 | 3571 | Electronic computers | FALSE |
| 9 | 7373 | Computer integrated systems design | FALSE |
| 10 | 7371 | Computer programming services | FALSE |
| 11 | 7379 | Computer related services, not elsewhere classified | FALSE |
| 12 | 3944 | Games, toys, and children's vehicles, except dolls and bicycles | FALSE |

A3 =CRMZ.BUSINESS.SICCODES(B1,"Primary,Code,Name",1)

| | A | B | C |
|---|---|---|---|
| 1 | BusinessId: | 2889 | |
| 2 | Name: | No Data | |
| 3 | Primary | Code | Name |
| 4 | TRUE | 7372 | Prepackaged software |
| 5 | FALSE | 3577 | Computer peripheral equipment, not elsewhere classified |
| 6 | FALSE | 7375 | Information retrieval services |
| 7 | FALSE | 3571 | Electronic computers |
| 8 | FALSE | 7373 | Computer integrated systems design |
| 9 | FALSE | 7371 | Computer programming services |
| 10 | FALSE | 7379 | Computer related services, not elsewhere classified |
| 11 | FALSE | 3944 | Games, toys, and children's vehicles, except dolls and bicycles |
| 12 | | | |
| 13 | Primary SIC Code: | Prepackaged software | |

B13 =VLOOKUP(TRUE,A3:C11,3,FALSE)

| | A | B | C |
|---|---|---|---|
| 1 | BusinessId: | 2889 | |
| 2 | Name | Microsoft Corp | |
| 3 | Primary | Code | Name |
| 4 | TRUE | 7372 | Prepackaged software |
| 5 | FALSE | 3577 | Computer peripheral equipment, not elsewhere classified |
| 6 | FALSE | 7375 | Information retrieval services |
| 7 | FALSE | 3571 | Electronic computers |
| 8 | FALSE | 7373 | Computer integrated systems design |
| 9 | FALSE | 7371 | Computer programming services |
| 10 | FALSE | 7379 | Computer related services, not elsewhere classified |
| 11 | FALSE | 3944 | Games, toys, and children's vehicles, except dolls and bicycles |
| 12 | | | |
| 13 | Primary SIC Code: | Prepackaged software | |

# NAICS CODES

## BUSINESS NAICS CODES function

The **BUSINESS/CUSTOMER/SUPPLIER NAICS CODES** function pulls the NAICS Codes registered for a business. You can choose which field you want to pull by typing individual fields or selecting a cell range.

- **Syntax**

**=CRMZ.BUSINESS.NAICSCODES([BusinessId], [Fields], [ShowHeaders])**

**=CRMZ.CUSTOMER.NAICSCodes([CustomerId], [Fields], [ShowHeaders])**

**=CRMZ.SUPPLIER.NAICSCodes([SupplierId], [Fields], [ShowHeaders])**

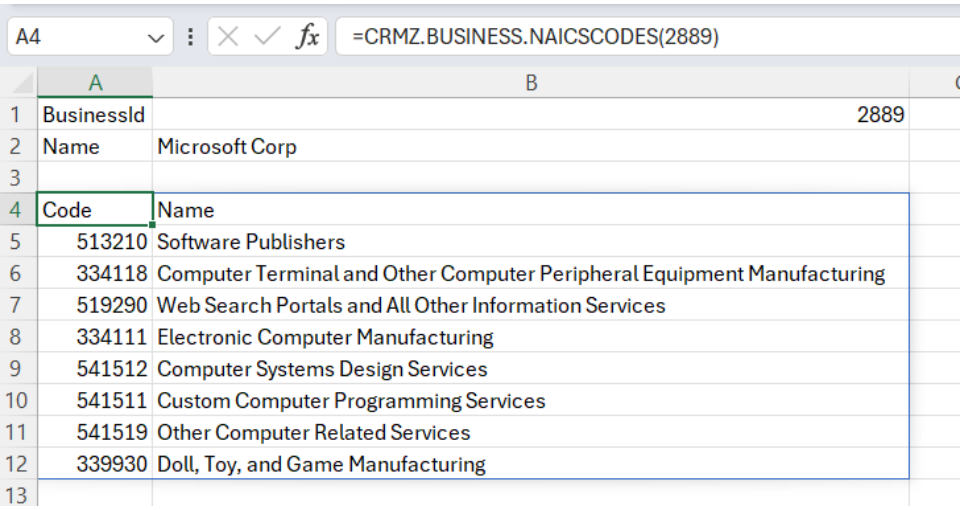
**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **Fields**<br>*optional* | The specific fields from this function you want to use. This function pulls 2 fields for a Business ID. You can mention the exact field like "Name", a cell reference like A2, a cell range like A2:B2 or a comma-separated string like "Code,Name".<br>The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

➢ Get the NAICS Codes information for a specific business

a. Find the business IDs you're interested in (*See item 2 for multiple ways to find the IDs*).
b. Paste the business IDs in any column to reference them in the formula.
c. Choose the business details fields you want to use (*See FIELDS function for an easy way to get this information*) or simply type the desired one.




# PEER ANALYSIS

## PEER ANALYSIS function

The **BUSINESS/CUSTOMER/SUPPLIER PEER ANALYSIS** function pulls the financial informaton from 37 fields for a business and its peer group. You can specify the period ifor the financials

alongside the SICCode and risk score filters. You can choose which field you want to pull by typing individual fields or selecting a cell range.

- **Syntax**

**=CRMZ.BUSINESS.PEERANALYSIS([BusinessId], [ShowRatios], [Year], [Quarter], [SICCode], [SICPrimary], [FolderId], [TargetCountry], [RiskLevelFilter], [FriskScoreFilter], [ZScoreFilter], [PayceScoreFilter], [DBTFilter], [Fields], [ShowHeaders])**

**=CRMZ.CUSTOMER.PEERANALYSIS([CustomerId], [ShowRatios], [Year], [Quarter], [SICCode], [SICPrimary], [FolderId], [TargetCountry], [RiskLevelFilter], [FriskScoreFilter], [ZScoreFilter], [PayceScoreFilter], [DBTFilter], [Fields], [ShowHeaders])**

**=CRMZ.SUPPLIER.PEERANALYSIS([SupplierId], [ShowRatios], [Year], [Quarter], [SICCode], [SICPrimary], [FolderId], [TargetCountry], [RiskLevelFilter], [FriskScoreFilter], [ZScoreFilter], [PayceScoreFilter], [DBTFilter], [Fields], [ShowHeaders])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **ShowRatios**<br>*optional* | Specifies whether to show the financial ratios of the business and its peer group in the output results. If set to "TRUE" or "1", it will show the metrics; otherwise, it will display information about the peer group (Year, Quarter, SIC Code, SIC Industry Name, and the number of businesses included in the peer group at the specified year and quarter). |
| **Year**<br>*optional* | Specifies the year of financial statements to analyze, formatted as YYYY/MM. The default option is the latest year the company has published financial statements. |
| **Quarter**<br>*optional* | Specifies the quarter of financial statements to analyze (valid options: 1, 2, 3, 4). The default option is the latest quarter the company has published financial statements. |
| **SICCode**<br>*optional* | The Standard Industrial Classification (SIC) code assigned to the business. |
| **SICPrimary**<br>*optional* | Specifies whether to include businesses in the peer group whose primary Standard Industrial Classification (SIC) matches that of the assigned business. If set to "Y", it will compare only primary SIC codes; otherwise, it will compare to any business that has a primary or secondary SIC code. |
| **FolderId**<br>*optional* | The identifier of the personal folder that is part of the customer's portfolio subgroups or folders setup. You can use the function CRMZ.PORTFOLIOFOLDERS() to obtain the FolderId. |

| | |
|---|---|
| **TargetCountry**<br>*optional* | The country code of the businesses in the peer group that matches the assigned to the business. It accepts the country-coded top-level domains for reporting the country code (e.g., “US” for the United States, “DE” for Germany). Reference: Internet country code - The World Factbook (cia.gov) |
| **RiskLevelFilter**<br>*optional* | Specifies the level of risk of the businesses in the peer group that match the assigned business. Valid values include:<br>From an overall risk level perspective, the following options show risk levels based on Credit Agencies' ratings combined with FRISK scores. The list of credit agency ratings available on our platforms are Moody's, Fitch, Morningstar DBRS.<br>- “NS”: Non-Scored. It means the business does not have any FRISK score or credit agency rating available in the selected or default period of analysis.<br>- “NF”: Non-FRISK Scored. It means the business does not have any FRISK score available in the selected or default period of analysis.<br>- “H1”: Risk Level 1. It means a FRISK score of 1 or an equivalent credit agency rating of CC/Ca or higher risk.<br>- “H2”: Risk Levels 1 and 2. It means a FRISK score of 2 or an equivalent credit agency rating of CCC.<br>- “H3”: Risk Levels 1, 2, and 3. It means a FRISK score of 3 or an equivalent credit agency rating of B.<br>- “H4”: Risk Levels 1, 2, 3, and 4. It means a FRISK score of 4 or an equivalent credit agency rating of BB.<br>- “H5”: Risk Level 1, 2, 3, 4, and 5. It means a FRISK score of 5 or an equivalent credit agency rating of BB+. Lower credit ratings are not considered as a risky level option. |
| **FriskScoreFilter**<br>*optional* | From a FRISK risk level perspective, please use one of the following options:<br>- “N”: Non-FRISK Scored. It means the business does not have any FRISK score available in the selected or default period of analysis.<br>- “S”: FRISK Scored. It means the business has a FRISK score available in the selected or default period of analysis.<br>- “H”: FRISK High Risk. It means the business has a FRISK score of 1,2,3,4 or 5 in the selected or default period of analysis.<br>- “M”: FRISK Medium Risk. It means the business has a FRISK score of 6,7 or 8 in the selected or default period of analysis.<br>- “L”: FRISK Low Risk. It means the business has a FRISK score of 9 or 10 in the selected or default period of analysis. |
| **ZScoreFilter**<br>*optional* | Specifies the level of Z-score of the businesses in the peer group that match the assigned business. Valid values include:<br>- “N”: Non Scored. It means the business does not have any Z-score available in the selected or default period of analysis. |

| | |
|---|---|
| | - "S": Scored. It means the business has a Z-score score available in the selected or default period of analysis.<br>- "H": High Risk. It means the business has a Z-score less than 1.1 in the selected or default period of analysis.<br>- "M": Medium Risk. It means the business has a Z-score equal to and higher than 1.1 but less than 2.6 in the selected or default period of analysis.<br>- "L": Low Risk. It means the business has a Z-score equal to and higher than 2.6 in the selected or default period of analysis. |
| **PayceScoreFilter**<br>*optional* | Specifies the level of Payce score of the businesses in the peer group that match the assigned business. Valid values include:<br>- "N": Non-PAYCE scored. It means the business does not have any PAYCE score available in the selected or default period of analysis.<br>- "S": PAYCE Scored. It means the business has a PAYCE score available in the selected or default period of analysis.<br>- "H": PAYCE Score High Risk. It means the business has a PAYCE score of 1,2,3,4 or 5 in the selected or default period of analysis.<br>- "M": PAYCE Score Medium Risk. It means the business has a PAYCE score of 6,7 or 8 in the selected or default period of analysis.<br>- "L": PAYCE Score Low Risk. It means the business has a PAYCE score of 9 or 10 in the selected or default period of analysis. |
| **DBTFilter**<br>*optional* | Specifies the level of Payce score of the businesses in the peer group that match the assigned business. Valid values include:<br>- "N": Non-Scored customers. It means the business does not have any DBT score available in the selected or default period of analysis.<br>- "S": Scored customers. It means the business has a DBT score available in the selected or default period of analysis.<br>- "D": Delinquent. It means the business has a high-risk DBT score of 1 (160+ days beyond terms) ,2 (91 - 105 days beyond terms), or 3 (76 - 90 days beyond terms) in the selected or default period of analysis.<br>- "W": Slow. It means the business has a medium-risk DBT score of 4 (61 - 75 days beyond terms), 5 (46 - 60 days beyond terms), 6 (31 - 45 days beyond terms), or 7 (21 - 30 days beyond terms) in the selected or default period of analysis.<br>- "P": Prompt. It means the business has a low-risk DBT score of 8 (11 - 20 days beyond terms), 9 (0 - 10 days beyond terms) or 10 (no past due balances for six consecutive periods) in the selected or default period of analysis. |

| | |
|---|---|
| **Fields**<br>*optional* | The specific fields from this function you want to use. This function pulls 8 score fields for a Business ID. You can mention the exact field like "FRISKScore", a cell reference like A2, a cell range like A2:C2 or a comma-separated string like "FRISKScore, PAYCEScore".<br>The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

➢ Get the peer analysis information for a specific business

a. Find the business IDs you're interested in (*See item 2 for multiple ways to find the IDs*).

b. Paste the business IDs in any column to reference them in the formula.

c. Choose the business details fields you want to use (*See FIELDS function for an easy way to get this information*) or simply type the desired one.

A3 =CRMZ.BUSINESS.PEERANALYSIS(B1)

| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | BusinessId: | 2889 | | | | | | |
| 2 | Name | Microsoft Corp | | | | | | |
| 3 | Ratio | Value | Max | Min | Median | Count | Rank | Quartile |
| 4 | Z-Score | 3.8811 | 498.3525 | -6619.8542 | 3.1927 | 1909 | 836 | 2 |
| 5 | Net Sales (Thousands of U.S. Dollars) | 62020000 | 119575000 | -27 | 23965 | 2166 | 4 | 1 |
| 6 | Gross Margin % Of Sales | 68.3602 | 6020 | -12660 | 50.19 | 1964 | 647 | 2 |
| 7 | Gross Margin % Of Sales -- TTM | 69.7482 | 1767.6839 | -4761.4754 | 50.2992 | 1996 | 600 | 2 |
| 8 | SGA % Of Sales | 13.2586 | 18890 | 0.0093 | 37.42945 | 2060 | 256 | 1 |
| 9 | SGA % Of Sales -- TTM | 13.4799 | 56037.8343 | 0.0038 | 38.11805 | 2100 | 246 | 1 |
| 10 | Net Profit Margin % Of Sales | 35.2628 | 31849.1575 | -51118.3099 | 3.00685 | 2138 | 82 | 1 |
| 11 | Net Profit Margin % Of Sales -- TTM | 36.2685 | 61492.3077 | -65556.1475 | 2.39375 | 2156 | 59 | 1 |
| 12 | EBITDA Margin Of Sales | 52.662 | 10748.3763 | -31556.6667 | 9.1179 | 1135 | 32 | 1 |
| 13 | Operating Margin % Of Sales | 43.3263 | 16686.9546 | -43060 | 4.45655 | 2138 | 60 | 1 |
| 14 | Operating Margin % Of Sales -- TTM | 44.1004 | 3944.3459 | -64197.1311 | 3.6223 | 2157 | 51 | 1 |
| 15 | Interest Coverage | 35.9307 | 86683.1818 | -37777.3167 | 4.0399 | 896 | 175 | 1 |
| 16 | Interest Coverage -- TTM | 48.5937 | 70314.6071 | -28394.4222 | 5.2506 | 1149 | 214 | 1 |
| 17 | % of Inventory Financed by Vendors | 1095.6656 | 82888.4669 | 0.1127 | 131.88865 | 952 | 165 | 1 |
| 18 | % of Inventory Financed by Vendors -- TTM | 801.7768 | 88403.178 | 0 | 129.9504 | 1037 | 212 | 1 |
| 19 | Inventory Turnover | 34.016 | 25803.1613 | -146.2442 | 9.447 | 1231 | 368 | 2 |
| 20 | Inventory Turnover -- TTM | 26.5372 | 80202.5 | -173.1789 | 9.2063 | 1254 | 417 | 2 |
| 21 | Accounts Payable Turnover | 4.2426 | 52730.6355 | -31.5248 | 7.9741 | 1742 | 1214 | 3 |
| 22 | Accounts Payable Turnover -- TTM | 4.0142 | 40689.3318 | -13.4575 | 7.5882 | 1791 | 1265 | 3 |

A6 =CRMZ.BUSINESS.PEERANALYSIS(B1,1,B3,B4,B5,,,,,,,,,1)

| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | BusinessId: | 2889 | | | | | | |
| 2 | Name | Microsoft Corp | | | | | | |
| 3 | Year | 2023 | | | | | | |
| 4 | Quarter | 3 | | | | | | |
| 5 | SIC Code | 7372 | | | | | | |
| 6 | Ratio | Value | Max | Min | Median | Count | Rank | Quartile |
| 7 | Z-Score | 4.6248 | 399.39 | -88993.5 | 3.42 | 3007 | 1230 | 2 |
| 8 | Net Sales (Thousands of U.S. Dollars) | 56517000 | 89498000 | -2079 | 16623 | 3144 | 3 | 1 |
| 9 | Gross Margin % Of Sales | 71.1556 | 2239.61 | -3400 | 44.1817 | 2883 | 682 | 1 |
| 10 | Gross Margin % Of Sales -- TTM | 69.4412 | 2417.502 | -16412.5 | 43.6895 | 2968 | 716 | 1 |
| 11 | SGA % Of Sales | 11.7858 | 97570.55 | 0.0056 | 34.53955 | 2986 | 386 | 1 |
| 12 | SGA % Of Sales -- TTM | 13.4213 | 78360.01 | 0.0037 | 35.0469 | 3065 | 447 | 1 |
| 13 | Net Profit Margin % Of Sales | 39.4412 | 9851.429 | -46450 | 1.88165 | 3068 | 106 | 1 |
| 14 | Net Profit Margin % Of Sales -- TTM | 35.3149 | 23888.57 | -91813.3 | 1.5816 | 3138 | 100 | 1 |
| 15 | EBITDA Margin Of Sales | 54.2722 | 1627.406 | -40059.1 | 6.49545 | 1670 | 56 | 1 |
| 16 | Operating Margin % Of Sales | 47.5768 | 1591.461 | -42587.5 | 2.727 | 3068 | 82 | 1 |
| 17 | Operating Margin % Of Sales -- TTM | 43.0072 | 6965 | -99291.6 | 2.2344 | 3139 | 90 | 1 |
| 18 | Interest Coverage | 58.4248 | 15256.19 | -86671 | 2.32615 | 1374 | 167 | 1 |

- BusinessId: Referenced on cell B1
- ShowRatios: '1'
- Year: 2023

- Quarter: 3
- SIC Code: 7372
- ShowHeaders: '1'

# BUSINESS LOOKUP

## BUSINESS LOOKUP function

The **BUSINESS LOOKUP** function allows users to search for businesses in CreditRiskMonitor's database. It returns 43 fields for the 15 best matches.

- **Syntax**

**=CRMZ.Lookup(Name, [Address], [City], [StateProvince], [Postal], [Country], [Fields], [ShowHeaders])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **Name**<br>*required* | Type the name of the business to look up. You can write its name or use a cell reference. |
| **Address**<br>*optional* | Type the address of the business to look up. You can write its address or use a cell reference. |
| **City**<br>*optional* | Type the city of the business to look up. You can write its city or use a cell reference.<br>NOTE: There are cities wih the same name in different countries or even in the same country. In these cases, the function will point out 'ambiguity'. You have to narrow down your search by filling out other parameters. |
| **StateProvince**<br>*optional* | Type the state or province of the business to look up. You can write its state or province or use a cell reference. |
| **Postal**<br>*optional* | Type the postal code of the business to look up. You can write its numbers or use a cell reference. |
| **Country**<br>*optional* | Type the country 2-digit code of the business to look up, i.e.: "US". You can use a cell reference. |
| **Fields**<br>*optional* | The specific fields from this function you want to use. This function pulls 252 financial fields for a Business ID. You can mention the exact field like "PrimaryBusinessName", a cell reference like A2, or a cell range like A2:C2. The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

➢ Find the Business ID of a particular business
  - Type "=CRMZ.LOOKUP()" in any cell

- Type the business name in the first parameter
- Type the city name in the third parameter

=CRMZ.LOOKUP("Amazon",,"Seattle")

| BusinessId | PrimaryBus | Address1 | Address2 | CityName | StateCode | P |
|---|---|---|---|---|---|---|
| 1839 | Amazon.co | 410 Terry | | Seattle | WA | 9 |
| 28752114 | Amazon We | 410 Terry | | Seattle | WA | |
| 36281339 | Amazon.co | 410 Terry | | Seattle | WA | |
| 31406990 | AMAZON | UNIT 611 | 1201 MER | SEATTLE | WA | |
| 31974280 | AMAZON | 500 9TH A | | SEATTLE | WA | |
| 32267958 | AMAZON | | 2646 RAIN | SEATTLE | WA | |
| 25467614 | AMAZON | FOR RETRA | | SEATTLE | WA | |
| 33658924 | AMAZON.C | 325 EASTL | | SEATTLE | WA | |
| 35814536 | AMAZON | 960 REPUE | | SEATTLE | WA | |
| 35843802 | AMAZON | 1800 9TH | | SEATTLE | WA | |
| 36410867 | AMAZON (P | PO BOX 84 | | SEATTLE | WA | |
| 36568590 | AMAZON | | 2400 6TH | SEATTLE | WA | |
| 37035163 | AMAZON | 2710 1ST A | | SEATTLE | WA | |
| 37055260 | AMAZON SE | ADDRESS U | | SEATTLE | WASHING | |
| 41914100 | AMAZON SE | | | SEATTLE | WA | |

- Solving ambiguity case
  - Type "=CRMZ.LOOKUP()" in any cell
  - Type the business name in the first parameter
  - Type the city name in the third parameter
    - You will get the message below.
  - Then, type "UK" for country in the sixth parameter.

=CRMZ.LOOKUP("Microsoft",,"London")

City name is ambiguous. Please resubmit with one of the cities from the following list.

| City | StateProvin | Country |
|---|---|---|
| London | London | UK |
| London | Ontario | CA |
| LONDON | Kentucky | US |
| LONDON | Ohio | US |

=CRMZ.LOOKUP("Microsoft",,"London",,,"UK")

| BusinessId | PrimaryBus | Address1 | Address2 | CityName | StateCode | PostalCod | Country |
|---|---|---|---|---|---|---|---|
| 2889 | Microsoft C | One Micro | | REDMOND | WA | 98052-639 | United S |
| 38017422 | MICROSOF | THE BROA | | | | EC2A 2RS | UK |
| 39809156 | MICROSOF | THE BROA | | | | EC2A 2RS | UK |

# PORTFOLIO

## PORTFOLIO function

The **PORTFOLIO** function pulls 15 fields from the businesses of your portfolio folders, which can be chosen at the user's convenience.

- **Syntax**

**=CRMZ.Portfolio([FolderId], [FirstRow], [LastRow], [Fields], [ShowHeaders])**

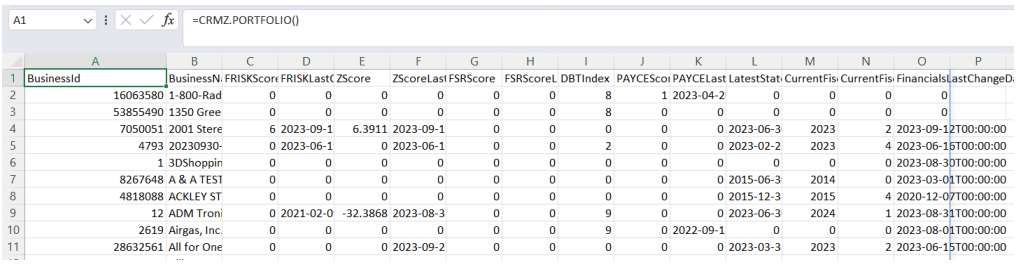
**Refer to [Common Data Inputs](#) if necessary.**

| Inputs | Description |
|---|---|
| **Folder**<br>*optional* | Type the name of the folder you want to pull the businesses from. You can write its name, use a cell reference, or cell ranges. |
| **FirstRow**<br>*optional* | This is the first row of your folder to return. The default value is 1. This can be a number or a cell reference. |
| **LastRow**<br>*optional* | This is the last row of your folder to return. The default value is 1000. This can be a number or a cell reference. |
| **FromDate**<br>*optional* | This will return only businesses that have had changes between today's date and the "from date" input. This can be a date (format "YYYY-MM-DD") or a cell reference. |
| **Fields**<br>*optional* | The specific fields from this function you want to use. This function pulls 15 fields for a particular folder. You can mention the exact field like "FRISKScore", a cell reference like A2, or a cell range like A2:C2. The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

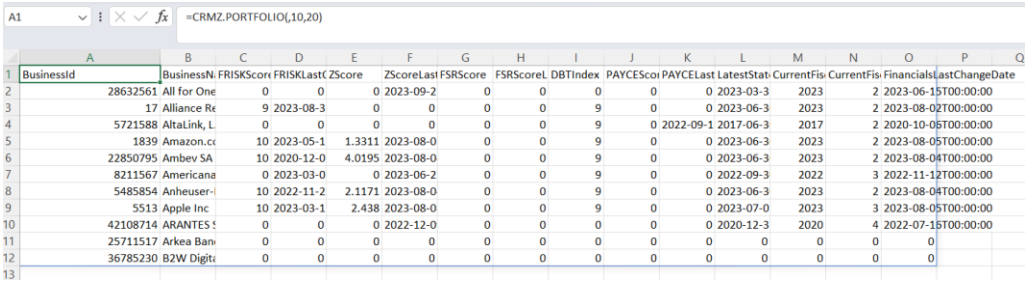
- **Use Cases & Best Practices**

➢ Get quick information about your portfolio

a. Choose your folder if you want to.
b. Choose the First and Last row if you want to filter your portfolio.
c. Filter by Last Changed Date.
d. Choose specific fields to return.




| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | BusinessId | BusinessN | FRISKScor | FRISKLastC | ZScore | ZScoreLast | FSRScore | FSRScoreL | DBTIndex | PAYCEScor | PAYCELast | LatestStat | CurrentFis | CurrentFis | FinancialsL | LastChangeD |
| 2 | 16063580 | 1-800-Rad | 0 | 0 | 0 | 0 | 0 | 0 | 8 | 1 | 2023-04-2 | 0 | 0 | 0 | 0 | |
| 3 | 53855490 | 1350 Gree | 0 | 0 | 0 | 0 | 0 | 0 | 8 | 0 | 0 | 0 | 0 | 0 | 0 | |
| 4 | 7050051 | 2001 Stere | 6 | 2023-09-1 | 6.3911 | 2023-09-1 | 0 | 0 | 0 | 0 | 0 | 2023-06-3 | 2023 | 2 | 2023-09-12 | T00:00:00 |
| 5 | 4793 | 20230930- | 0 | 2023-06-1 | 0 | 2023-06-1 | 0 | 0 | 2 | 0 | 0 | 2023-02-2 | 2023 | 4 | 2023-06-16 | T00:00:00 |
| 6 | 1 | 3DShoppin | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2023-08-30 | T00:00:00 |
| 7 | 8267648 | A & A TEST | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2015-06-3 | 2014 | 0 | 2023-03-01 | T00:00:00 |
| 8 | 4818088 | ACKLEY ST | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2015-12-3 | 2015 | 4 | 2020-12-07 | T00:00:00 |
| 9 | 12 | ADM Troni | 0 | 2021-02-0 | -32.3868 | 2023-08-3 | 0 | 0 | 9 | 0 | 0 | 2023-06-3 | 2024 | 1 | 2023-08-31 | T00:00:00 |
| 10 | 2619 | Airgas, Inc. | 0 | 0 | 0 | 0 | 0 | 0 | 9 | 0 | 2022-09-1 | 0 | 0 | 0 | 2023-08-01 | T00:00:00 |
| 11 | 28632561 | All for One | 0 | 0 | 0 | 2023-09-2 | 0 | 0 | 0 | 0 | 0 | 2023-03-3 | 2023 | 2 | 2023-06-15 | T00:00:00 |




| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | BusinessId | BusinessN | FRISKScor | FRISKLastC | ZScore | ZScoreLast | FSRScore | FSRScoreL | DBTIndex | PAYCEScor | PAYCELast | LatestStat | CurrentFis | CurrentFis | FinancialsL | LastChangeDate | |
| 2 | 28632561 | All for One | 0 | 0 | 0 | 2023-09-2 | 0 | 0 | 0 | 0 | 0 | 2023-03-3 | 2023 | 2 | 2023-06-15 | T00:00:00 | |
| 3 | 17 | Alliance Re | 9 | 2023-08-3 | 0 | 0 | 0 | 0 | 9 | 0 | 0 | 2023-06-3 | 2023 | 2 | 2023-08-02 | T00:00:00 | |
| 4 | 5721588 | AltaLink, L | 0 | 0 | 0 | 0 | 0 | 0 | 9 | 0 | 2022-09-1 | 2017-06-3 | 2017 | 2 | 2020-10-05 | T00:00:00 | |
| 5 | 1839 | Amazon.co | 10 | 2023-05-1 | 1.3311 | 2023-08-0 | 0 | 0 | 9 | 0 | 0 | 2023-06-3 | 2023 | 2 | 2023-08-05 | T00:00:00 | |
| 6 | 22850795 | Ambev SA | 10 | 2020-12-0 | 4.0195 | 2023-08-0 | 0 | 0 | 9 | 0 | 0 | 2023-06-3 | 2023 | 2 | 2023-08-04 | T00:00:00 | |
| 7 | 8211567 | Americana | 0 | 2023-03-0 | 0 | 2023-06-2 | 0 | 0 | 9 | 0 | 0 | 2022-09-3 | 2022 | 3 | 2022-11-12 | T00:00:00 | |
| 8 | 5485854 | Anheuser- | 10 | 2022-11-2 | 2.1171 | 2023-08-0 | 0 | 0 | 9 | 0 | 0 | 2023-06-3 | 2023 | 2 | 2023-08-04 | T00:00:00 | |
| 9 | 5513 | Apple Inc | 10 | 2023-03-1 | 2.438 | 2023-08-0 | 0 | 0 | 9 | 0 | 0 | 2023-07-0 | 2023 | 3 | 2023-08-05 | T00:00:00 | |
| 10 | 42108714 | ARANTES S | 0 | 0 | 0 | 2022-12-0 | 0 | 0 | 0 | 0 | 0 | 2020-12-3 | 2020 | 4 | 2022-07-15 | T00:00:00 | |
| 11 | 25711517 | Arkea Ban | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| 12 | 36785230 | B2W Digita | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| 13 | | | | | | | | | | | | | | | | | |

A1 =CRMZ.PORTFOLIO(,,,,"BusinessName",1)

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | BusinessName | | | | |
| 2 | 1-800-Radiator.com | | | | |
| 3 | 1350 Greenview Shores, LLC | | | | |
| 4 | 2001 Stereo Systems, Inc. | | | | |
| 5 | 20230930-DK-Butterfly-1, Inc. | | | | |
| 6 | 3DShopping.com | | | | |
| 7 | A & A TESTING | | | | |
| 8 | ACKLEY STATE BANK | | | | |
| 9 | ADM Tronics Unlimited Inc | | | | |
| 10 | Airgas, Inc. | | | | |
| 11 | All for One Media Corp | | | | |
| 12 | Alliance Resource Partners, L.P. | | | | |

A2 =CRMZ.PORTFOLIO(,,,,A1:D1,0)

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | BusinessId | BusinessName | FRISKScore | ZScore | | |
| 2 | 16063580 | 1-800-Radiator | 0 | 0 | | |
| 3 | 53855490 | 1350 Greenviev | 0 | 0 | | |
| 4 | 7050051 | 2001 Stereo Sys | 6 | 6.391 | | |
| 5 | 4793 | 20230930-DK-E | 0 | 0 | | |
| 6 | 1 | 3DShopping.co | 0 | 0 | | |
| 7 | 8267648 | A & A TESTING | 0 | 0 | | |

- Filter your portfolio by FRISK-scored businesses
  a. Follow the steps from the previous example
  b. Use the FILTER function to filter businesses with FRISK Score different than 0
     i. As the filter condition, use the CHOOSECOLS function to specify the FRISK Score column
  c. If you want to filter by only high-risk businesses, you can add an AND condition in the Filter condition for FRISK Score less than or equal to 5

A2 =FILTER(CRMZ.PORTFOLIO(,,,,A1:D1,0),CHOOSECOLS(CRMZ.PORTFOLIO(,,,,A1:D1,0),3)<>0)

| | A | B | C | D |
|---|---|---|---|---|
| 1 | BusinessId | BusinessName | FRISKScore | ZScore |
| 2 | 7050051 | 2001 Stereo Sys | 6 | 6.391 |
| 3 | 17 | Alliance Resour | 9 | 0 |
| 4 | 1839 | Amazon.com, I | 10 | 1.331 |
| 5 | 22850795 | Ambev SA | 10 | 4.02 |
| 6 | 5485854 | Anheuser-Busc | 10 | 2.117 |
| 7 | 5513 | Apple Inc | 10 | 2.438 |
| 8 | 5653 | Berkshire Hatha | 10 | 0 |
| 9 | 10957698 | BILL Holdings In | 5 | 2.263 |
| 10 | 5503088 | Brazilian Develo | 7 | 0 |

A2 =FILTER(CRMZ.PORTFOLIO(,,,,A1:D1,0),(CHOOSECOLS(CRMZ.PORTFOLIO(,,,,A1:D1,0),3)<>0)*(CHOOSECOLS(CRMZ.PORTFOLIO(,,,,A1:D1,0),3)<=5))

| | A | B | C | D |
|---|---|---|---|---|
| 1 | BusinessId | BusinessName | FRISKScore | ZScore |
| 2 | 10957698 | BILL Holdings In | 5 | 2.263 |
| 3 | 14439 | Dixie Group Inc | 2 | -0.977 |
| 4 | 29346373 | F45 Training Ho | 1 | 0 |
| 5 | 10476634 | FlexShopper Inc | 4 | 3.988 |
| 6 | 39786253 | MICROLISE LIM | 5 | 3.588 |
| 7 | 17605104 | Oshawa Power | 5 | 0 |
| 8 | 5489806 | Prosegur Comp | 5 | 2.297 |
| 9 | 30466938 | TI Fluid Systems | 5 | 2.484 |
| 10 | 8792130 | Trek Metals Ltd | 5 | 0 |
| 11 | 6790 | United Natural | 4 | 1.948 |
| 12 | 35970879 | Wework Inc | 1 | -5.109 |
| 13 | 31881701 | Xponential Fitn | 4 | -3.539 |

## PORTFOLIO FOLDERS function

The **PORTFOLIO FOLDERS** function pulls the folders you have created in your CreditRiskMonitor account.

- **Syntax**

**=CRMZ.Portfolio.Folders([Fields], [ShowHeaders])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **Fields**<br>*optional* | The specific fields from this function you want to use. You can mention the exact field like "FolderName", a cell reference like A2, or a cell range like A2:C2. The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

➢ Show all the folders that I have in my account.

a. Just type the formula CRMZ.PORTFOLIOFOLDERS()

A2 =CRMZ.PORTFOLIOFOLDERS()

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | | | | | |
| 2 | FolderId | UserId | FolderName | DateCreated | DateUpdated |
| 3 | 107445 | 139223 | APAC | 2023-10-11T09:46:59.01 | 2023-10-11T09:46:59.01 |
| 4 | 107333 | 139223 | Suppliers 1 | 2023-10-06T13:35:59.277 | 2023-10-06T13:35:59.277 |
| 5 | 106936 | 139223 | Suppliers 2 | 2023-09-14T10:22:05.88 | 2023-09-14T10:22:05.883 |
| 6 | | | | | |

- Pull only the FolderId and FolderName fields from your folders.

A2 =CRMZ.PORTFOLIOFOLDERS(A1:B1,0)

| | A | B | C | D |
|---|---|---|---|---|
| 1 | FolderId | FolderName | | |
| 2 | 107445 | APAC | | |
| 3 | 107333 | Suppliers 1 | | |
| 4 | 106936 | Suppliers 2 | | |

## PORTFOLIO DOWNLOAD function

The **PORTFOLIO DOWNLOAD** function allows users to get the businesses from their portfolio folders by customizing the layout and fields. Use this function to replace the need to download files from the Portfolio Download page on CreditRiskMonitor's website.

- **Syntax**

**=CRMZ.Portfolio.Download([Layout], [FolderId], [Fields], [ShowHeaders])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **Layout**<br>*optional* | Specify the layout which can be found on the Portfolio Download page. The most common: |
| **FolderId**<br>*optional* | Type FolderId you want to pull the businesses from. You can write its number or use a cell reference. |
| **Fields**<br>*optional* | The specific fields from this function you want to use. The number of fields will vary depending on which Layout you choose. You can mention the exact field like "FRISKScore", a cell reference like A2, or a cell range like A2:C2. The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

➢ Download the businesses from your portfolio using the Latest Annual Financials layout.

a. Specify the Layout as “ANNUAL”.

b. Choose your folder if you want to.

A1 =CRMZ.PORTFOLIODOWNLOAD("ANNUAL")

| | A | B | C | D | E | F | G | H | I | J | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | BusinessId | BusinessName | Address1 | City | State | Zip | Country | Phone | Fax | WebSite | Tax |
| 2 | 16063580 | 1-800-Radiator | 4401 Park R | Benicia | CA | 94510 | US | 800-248-8 | 0 | https://ww | 942 |
| 3 | 53855490 | 1350 Greenviev | 1350 Green | Welling | FL | 33414 | US | 0 | 0 | 0 | 812 |
| 4 | 7050051 | 2001 Stereo Sy | 5015 Westh | Housto | TX | 75205 | US | 713 960 81 | 0 | 0 | |
| 5 | 4793 | 20230930-DK-E | 650 Liberty | UNION | NJ | 07083 | US | (908) 688- | 0 | http://ww | 112 |

➢ The above example returns more than 200 fields. Filter your portfolio download by only the fields you are interested in.

A2 =CRMZ.PORTFOLIODOWNLOAD("ANNUAL",,A1:F1,0)

| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | BusinessId | BusinessName | Country | Employ | FriskScore | EBITDA | | |
| 2 | 16063580 | 1-800-Radiator | US | 0 | 0 | 0 | | |
| 3 | 53855490 | 1350 Greenviev | US | 0 | 0 | 0 | | |
| 4 | 7050051 | 2001 Stereo Sy | US | 0 | 6 | 0 | | |
| 5 | 4793 | 20230930-DK-E | US | 0 | 0 | -2992286 | | |
| 6 | 1 | 3DShopping.co | US | 41 | 0 | 0 | | |
| 7 | 8267648 | A & A TESTING | US | 0 | 0 | 0 | | |

# SUPPLIERS

## SUPPLIERS function

The **SUPPLIERS** function pulls 43 fields for each of your suppliers. Only SupplyChainMonitor subscribers are allowed to use this function.

- **Syntax**

**=CRMZ.Suppliers([NamedViewId], [FirstRow], [LastRow], [Fields], [ShowHeaders])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **NamedViewId**<br>*optional* | This is the SupplyChainMonitor Named Views Ids to get supliers for. The CRMZ.Suppliers.NamedViews function can be used to retrieve the Ids for this function. |
| **FirstRow**<br>*optional* | This is the first row to return. The default value is 1. This can be a number or a cell reference. |
| **LastRow**<br>*optional* | This is the last row to return. The default value is 1000. This can be a number or a cell reference. |
| **Fields**<br>*optional* | The specific fields from this function you want to use. You can mention the exact field like “BusinessName”, a cell reference like A2, or a cell range like A2:C2. The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

➢ Show all my suppliers.

a. Simply execute the function CRMZ.SUPPLIERS()

=CRMZ.SUPPLIERS()

| B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|
| Supplier.SupplierId | Supplier.BusinessName | Supplier.A | Supplier.Ci | Supplier.Stat | Supplier.P | Supplier.C | Supplier.C S |
| | 1-800-Radiator.com | 4401 Park | Benicia | CA | 94510 | US | United Sta |
| | 1350 Greenview Shores, LLC | 1350 Gree | Wellingtor | FL | 33414 | US | United Sta |
| | 2001 Stereo Systems, Inc. | 5015 West | Houston | TX | 75205 | US | United Sta |
| | Bed Bath & Beyond Inc. | 650 Libert | UNION | NJ | 07083-813 | US | United Sta |
| | 2U Inc | 8201 Corp | Landover | MD | 20785 | US | United Sta |
| | 360 NW 27th Street Tenant LLC | 12 East 49 | New York | NY | 10017 | US | United Sta |

➢ Show suppliers located in the United States.

a. Simply execute the function CRMZ.SUPPLIERS()

## NAMED VIEWS function

The **NAMED VIEWS** function pulls all the views created in SupplyChainMonitor. You can choose which field you want to pull by typing individual fields or selecting a cell range.

- **Syntax**

**=CRMZ.SUPPLIERS.NAMEDVIEWS([Fields], [ShowHeaders])**

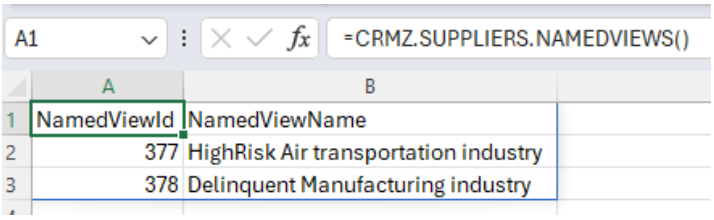
**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **Fields**<br>*optional* | The specific fields from this function you want to use. You can mention the exact field like "BusinessName", a cell reference like A2, or a cell range like A2:C2. The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

➢ Show all my named views.

a. Simply execute the function CRMZ.SUPPLIERS.NAMEDVIEWS()




You can use this function to get the NamedViewId. This Id can be used in to the CRMZ.SUPPLIERS() function to return the list of Suppliers in that Named View.

## SUPPLIERS DOWNLOAD function

The **SUPPLIERS DOWNLOAD** function allows users to get the suppliers from their list by customizing the layout and fields. Use this function to replace the need to download files from the Download page on SupplyChainMonitor's website.

- **Syntax**

**=CRMZ.SUPPLIERS.DOWNLOAD ([Layout], [NamedViewId], [Fields], [ShowHeaders])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **Layout**<br>*optional* | Specifies the custom layout identifier, which determines the list of data fields or columns to retrieve from the businesses. The options are: "Business Details", "My Supplier Details", "Basic Financial Statements" |
| **NamedViewId**<br>*optional* | This is the SupplyChainMonitor Named Views Ids to get supliers for. The CRMZ.Suppliers.NamedViews function can be used to retrieve the Ids for this function. |
| **Fields**<br>*optional* | The specific fields from this function you want to use. You can mention the exact field like “BusinessName”, a cell reference like A2, or a cell range like A2:C2. The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

To Be Included later

## SUPPLIERS SCORE HISTORY function

The **SUPPLIERS SCORE HISTORY** function pulls score information for a list of suppliers. You can specify the Start and/or End Dates of the monthly risk scores. You can choose which score you want to pull by typing individual fields or selecting a cell range.

- **Syntax**

**=CRMZ.SUPPLIERS.SCOREHISTORY([Type], [NamedViewId], [StartDate], [EndDate], [Fields], [ShowHeaders])**

**Refer to Common Data Inputs if necessary.**

| Inputs | Description |
|---|---|
| **Type**<br>*optional* | This is the score type to pull information. |
| **NamedViewId**<br>*optional* | This is the SupplyChainMonitor Named Views Ids to get supliers for. The CRMZ.Suppliers.NamedViews function can be used to retrieve the Ids for this function. |
| **StartDate**<br>*optional* | Specifies the start date of the risk scores to display, formatted as YYYY/MM. The default option is the current date. |
| **EndDate**<br>*optional* | Specifies the end date of the risk scores to display, formatted as YYYY/MM. The end date must be at least 45 days apart from the start date. The default option is one year ago. |
| **Fields**<br>*optional* | The specific fields from this function you want to use. You can mention the exact field like "BusinessName", a cell reference like A2, or a cell range like A2:C2. The latter can be used either vertically or horizontally.<br><br>See Use Cases for best practices on how to use specific fields. |

- **Use Cases & Best Practices**

To Be Included later

## FIELDS function

The **FIELDS** function pulls which fields or headers are available to retrieve information from for each CRMZ function in Excel. Use this function to reference cell ranges and quickly customize your functions across your worksheet.

- **Syntax**

| Inputs | Description |
|---|---|
| **FunctionName**<br>*required* | Type the function name you want to retrieve the fields or headers for. For instance, type "BusinessDetails" to know all fields the Business Details function can return.<br><br>The only exception for this function is the Business Financial Details function. |

- **Use Cases & Best Practices**

- Get the fields available for any function, except BusinessFinancialDetails
  a. Type the “FunctionName” just like the picture below.
  b. As a best practice, use TRANSPOSE to get the fields on a single column. This way you can apply filters and quickly search for specific fields.

| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | =TRANSPOSE(CRMZ.FIELDS("BusinessDetails")) | =TRANSPOSE(CRMZ.FIELDS("Lookup")) | =TRANSPOSE(CRMZ.FIELDS("Portfolio")) | =TRANSPOSE(CRMZ.FIELDS("PortfolioDownload") | =TRANSPOSE(CRMZ.FIELDS("PortfolioFolders")) | =TRANSPOSE(CRMZ.FIELDS("ScoreHistory")) | =TRANSPOSE(CRMZ.FIELDS("Suppliers")) |
| 2 | Name | BusinessId | BusinessId | BusinessId | FolderId | FRISKScore | RowNumber |
| 3 | ParentBusinessId | PrimaryBusinessName | BusinessName | BusinessName | UserId | DBTScore | BusinessId |
| 4 | ParentBusinessName | Address1 | FRISKScore | LongTermRating | FolderName | ZScore | UserGroupId |
| 5 | BusinessId | Address2 | FRISKLastChangeDate | Outlook | DateCreated | PAYCEScore | ServiceAvailable |
| 6 | Address1 | CityName | ZScore | Address1 | DateUpdated | FSRScore | BusinessRoleId |
| 7 | CityName | StateCode | ZScoreLastChangeDate | City | | Year | BusinessType |
| 8 | StateProvinceName | PostalCode | FSRScore | State | | Month | BusinessName |
| 9 | PostalCode | CountryName | FSRScoreLastChangeDate | Zip | | Quarter | Address1 |
| 10 | CountryName | CountryCode | DBTIndex | Country | | | CityName |
| 11 | PhoneNumber | PhoneNumber | PAYCEScore | Phone | | | StateProvinceName |
| 12 | FaxNumber | TradingStatus | PAYCELastChangeDate | Fax | | | PostalCode |
| 13 | EmailAddress | IncorporatedDate | LatestStatementDate | WebSite | | | CountryName |
| 14 | TradingStatus | IncorporatedIn | CurrentFiscalYear | TaxId | | | CountryCode |
| 15 | IncorporatedDate | IncorporatedInState | CurrentFiscalQuarter | CIK | | | PayScore |
| 16 | IncorporatedIn | TickerSymbol | FinancialsLastChangeDate | Employees | | | PayScoreDate |
| 17 | IncorporatedInState | StockExchange | | EmployeesAsOfDate | | | DBTIndex |
| 18 | FederalTaxId | FederalTaxId | | LastAuditDate | | | DBTIndexDate |
| 19 | CIKNumber | CIKNumber | | LastAuditor | | | TradeAccounts |
| 20 | TickerSymbol | LatestStatementDate | | LastAuditOpinion | | | TotalDue |
| 21 | StockExchange | Employees | | StatementYear | | | PastDue |
| 22 | MarketCap | EmployeesAsOfDate | | StatementQuarter | | | FSRScore |
| 23 | Employees | MarketCap | | QuarterEndDate | | | PAYCELastChangeDate |
| 24 | EmployeesAsOfDate | BusinessNameOfMatch | | CurrencyCode | | | InheritedFSRScore |
| 25 | PAYCEScore | Address1OfMatch | | TotalSales | | | PrimaryBusinessName |
| 26 | PAYCEScoreDate | Address2OfMatch | | CostOfGoods | | | UserGroupName |
| 27 | FriskScore | CityNameOfMatch | | NetIncome | | | UserId |
| 28 | FriskScoreDate | StateCodeOfMatch | | Inventory | | | BusinessEIURating |
| 29 | ZScore | PostalCodeOfMatch | | TotalAssets | | | SupplierEIURating |
| 30 | ZScoreDate | CountryCodeOfMatch | | TotalLiabilities | | | BusinessCount |
| 31 | DBTIndex | PhoneNumberOfMatch | | NetSales | | | |

C2 =CRMZ.BUSINESSDETAILS(C1,A4:A9)

| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Name | | 2889 | | | | | | |
| 2 | ParentBusinessId | | BusinessId | Address1 | CityName | StateProvi | PostalCod | CountryName | |
| 3 | ParentBusinessName | | 2889 | One Micro | REDMONI | WA | 98052-639 | United States | |
| 4 | BusinessId | | | | | | | | |
| 5 | Address1 | | | | | | | | |
| 6 | CityName | | | | | | | | |
| 7 | StateProvinceName | | | | | | | | |
| 8 | PostalCode | | | | | | | | |
| 9 | CountryName | | | | | | | | |
| 10 | PhoneNumber | | | | | | | | |
| 11 | FaxNumber | | | | | | | | |
| 12 | EmailAddress | | | | | | | | |
| 13 | TradingStatus | | | | | | | | |
| 14 | IncorporatedDate | | | | | | | | |
| 15 | IncorporatedIn | | | | | | | | |
| 16 | IncorporatedInState | | | | | | | | |
| 17 | FederalTaxId | | | | | | | | |
| 18 | CIKNumber | | | | | | | | |
| 19 | TickerSymbol | | | | | | | | |
| 20 | StockExchange | | | | | | | | |

=TRANSPOSE(CRMZ.FIELDS("BusinessDetails"))