

D&B360

User Guide

for Microsoft Dynamics CRM

Version 2.3

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About this Guide

Audience and Purpose

This guide is for D&B360 for Microsoft Dynamics CRM 2011 and Microsoft Dynamics CRM 2013 users who plan to take advantage of the rich features and benefits of D&B360 in their CRM environment.

If you are interested in more training and education about using our products, learning opportunities are available here: [D&B360 Training and Education](#).

Conventions

Note: Notes mean *reader take note* and provide helpful suggestions.

(!) Important Note: Important Notes mean *reader be careful*. In this situation, you might do something that could result in loss of data.

In sections that include instructions for using the D&B360 and CRM graphical user interface (GUI):

- Text in **bold** indicates the name of a window, tab, field, area, or button that you click or interact with.
- Text in `monospace` indicates a directory path or a command that you need to type in the command-line interface.

Navigating in the PDF

Note: To download the free, latest version of Adobe Reader, go to this web site:
<http://get.adobe.com/reader/>.

1. To return to the page you were on after you click a cross reference link, press **Alt + Left Arrow**.
2. To return to the first page of the document, press the **Shift + Home**.
3. To navigate in the PDF file or change the Adobe Reader settings, on the Adobe Reader menu, select **View > Page Navigation, Page Display, and Zoom**.

Related Documentation

For more information about using the Microsoft Dynamics CRM, refer to the CRM documentation.



1 Introduction to D&B360

Welcome to the *D&B360 Administration and Installation Guide for Microsoft Dynamics CRM*, which connects you to customer and prospective customer data that only D&B can provide – plus relevant Rest-of-World content, all within your instance of Microsoft Dynamics CRM.

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Product Benefits

With D&B360, you finally get the business insight you need, the D&B data quality you want, and the ease-of-use you deserve.



Now you can see all angles of your prospects and customers within your CRM:

- Know your customers better.
- Acquire new prospects.
- Sell deeper into organizations.
- Improve salesperson effectiveness.

D&B empowers you with relevant and credible information, facilitating your role as a trusted advisor to enable new sales.

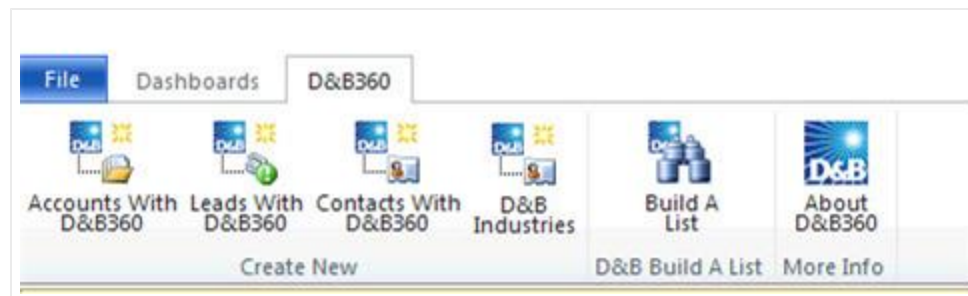
See New Opportunities	Seeing your customers and prospects in a new way can uncover new information and new-sale entry points.
Accelerate Your Sales Cycle	Once you establish relevance and credibility, customers will trust you with their business.
Expand Your Customer Footprint	Build customer relationships on a foundation that is based on relevance, credibility, and trust.
Position Your Success	<p>With D&B360, you have a powerful tool that helps you to better understand your customers pain points, respond to their needs, and ultimately positions you to win more business.</p> <p>The D&B360 platform features On-demand access to D&B data, automatic refresh and synchronization with the D&B database, and seamless integration of rest-of-world data.</p>

Guide Objectives

The D&B360 Administration and Installation Guide for Microsoft Dynamics CRM provides instructions for the commonly used D&B360 functions for enhancing your working experience.

Guide Organization

After your Administrator has added D&B360 to the Microsoft Dynamics CRM, new options (on the left menu) and new icon links (in the ribbon) will display and provide access to new features and functions. In some menus, like Account Record for example, you will see links on both the left side of the window and in the ribbon.



Note: Some additional functions are used by the D&B360 Administrator. If you are not authorized to use them, you will not have access to them. If you are authorized to use these functions, refer to the *D&B360 Administration Guide* for more information.

D&B360 Packages

The D&B360 features are available in the packages described in this section.

Note: D&B People are considered to be premium if direct contact information for them is available to download.

Paid Subscriptions

Type of Tracking	Description
Person Credit	<ul style="list-style-type: none">Imports of premium people are limited and charged against your contact credits. That is, D&B only charges you the first time you import a specific premium person. D&B does not charge any subsequent imports of that person.For each premium import, one credit is consumed.Imports of non-premium people are unlimited, and importing them is not charged against your credits. <p>For example:</p> <ul style="list-style-type: none">When you import multiple people that includes 20 premium people, and 5 of these were previously imported, D&B charges you credits only for the 15 contact credits that were not already imported.When you import a single person that is a previously imported premium person, you are not charged a contact credit.
Company Credit	Company imports are unlimited for paid customers, and D&B does not charge credits for them.

Trial Subscriptions

Type of Tracking	Description
Person Credit	<p>The contact credit limit represents the combined number of premium and non-premium D&B people that customers can import.</p> <p>For example, a user with a trial credit limit of 25 could import:</p> <ul style="list-style-type: none">• 20 premium and 5 non-premium people; or• 10 premium and 15 non-premium people, and so on.
Company Credit	Company imports are limited and tracked for trial customers.

Note: Batch Match Records, Batch Refresh Records, and additional contacts are available as an add-on package. Contact your Sales Representative to include this in your package.

Note: De-duplication Check, De-duplication Fix, De-duplication Prevention, and Duplicate DUNS reports are included. However, these features do not perform optimally without DUNS numbers appended to all records by using Batch Match or the DUNS Import Tool.

Credit Consumption Rules

D&B People are considered to be premium if direct contact information for them is available to download.

Type of Tracking	Description
Person Credit	<ul style="list-style-type: none"> Imports of premium people are limited and charged against your contact credits. That is, D&B only charges you the first time you import a specific premium person. D&B does not charge any subsequent imports of that person. For each premium import, one credit is consumed. Imports of non-premium people are unlimited, and importing them is not charged against your credits. <p>For example:</p> <ul style="list-style-type: none"> When you import multiple people that includes 20 premium people, and 5 of these were previously imported, D&B charges you credits only for the 15 contact credits that were not already imported. When you import a single person that is a previously imported premium person, you are not charged a contact credit.
Company Credit	Company imports are unlimited for paid customers, and D&B does not charge credits for them.

Type of Tracking	Description
Person Credit	<p>The contact credit limit represents the combined number of premium and non-premium D&B people that customers can import.</p> <p>For example, a user with a trial credit limit of 25 could import:</p> <ul style="list-style-type: none"> 20 premium and 5 non-premium people; or 10 premium and 15 non-premium people, and so on.
Company Credit	Company imports are limited and tracked for trial customers.

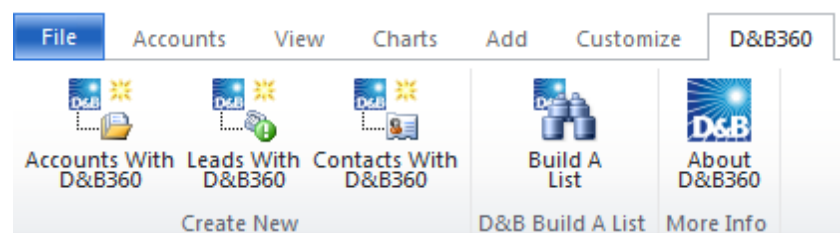


2 Getting Started with D&B360

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Accessing the D&B360 Window

After your administrator has added D&B360 to your CRM, you are ready to go.

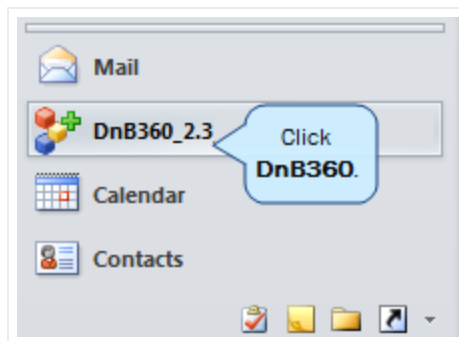


- To log in to the Microsoft Dynamics CRM, type your user name and password.

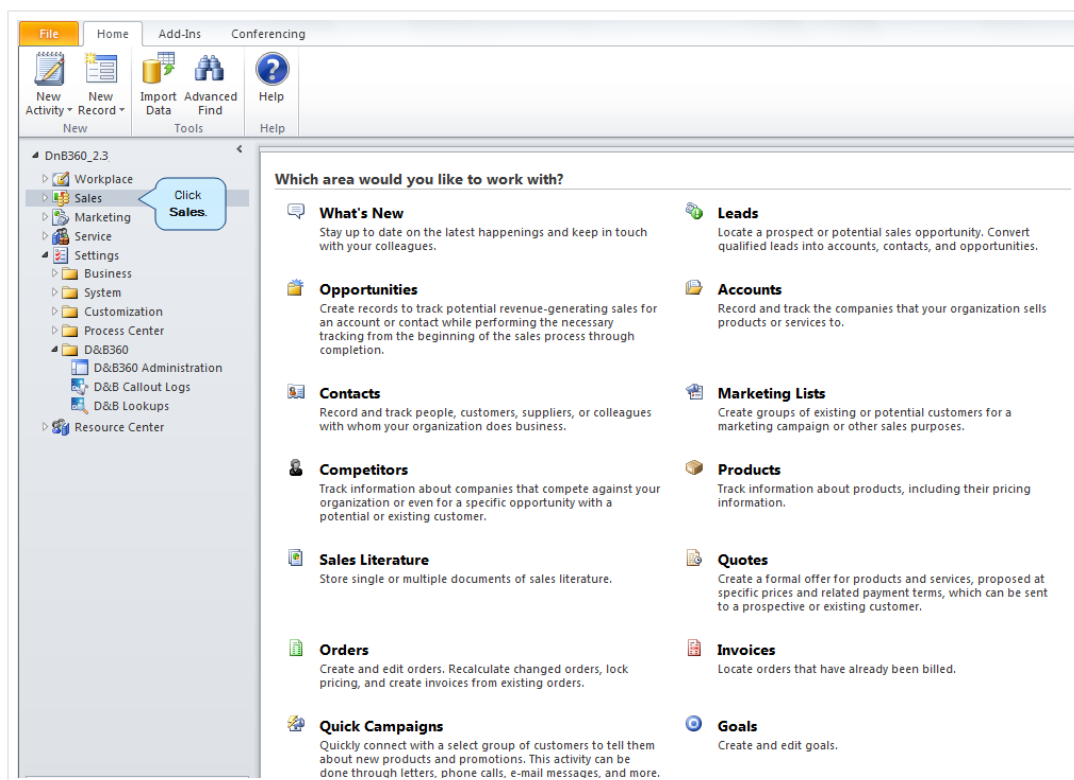
Accessing D&B360 through Microsoft Outlook

After your administrator has configured D&B360 to integrate with Microsoft Outlook, D&B360 displays in your Outlook application.

1. In the bottom left corner of your Outlook window, click **DnB360**, or the name of your D&B360 instance.



2. In the **Dnb360** area, click **Sales**.



The **Dnb360** menu bar and features display in your Outlook application.

Microsoft Outlook

File Accounts View Charts Add Customize DnB360 Add-Ins Conferencing

Accounts With DnB360 Leads With DnB360 Contacts With DnB360 DnB Industries Build A List About DnB360

Create New DnB Build A List More Info

DnB360_2.3_BetaRelease

- Workplace
- Sales
 - What's New
 - Leads
 - Opportunities
 - Accounts
 - Contacts
 - Marketing Lists
 - Competitors
 - Products
 - Sales Literature
 - Quotes
 - Orders
 - Invoices
 - Quick Campaigns
 - Goals
 - Goal Metrics
 - Rollup Queries
- Marketing
- Service
- Settings
 - Business
 - System
 - Customization
 - Process Center
 - D&B360
 - D&B360 Administration
 - D&B Callout Logs
 - D&B Lookups
- Resource Center

Get Started with Accounts
An account is a company or corporation that you do business with.

1. Import
→ [Import from Files](#)
→ [About Importing](#)

2. Use
→ [About Quick Campaigns](#)
→ [Detect Duplicates](#)
→ [Set Synchronization Options](#)

3. Modify & Manage
→ [Create Custom Views](#)
→ [Set Up Duplicate Detection](#)
→ [Customize Accounts](#)

Overview | Video

My Active Accounts

Search My Active Accounts

Account Name	Main Phone	Address 1: City	Primary Contact	E-mail (Primary Contact)
J Evo Travel		Dallas		
A Store (sample)	555-0136	Renton	Adrian Dumitrascu (sample)	someone_a@example
Abilene Eye Institute		Abilene		
Advanced Components (sample)	555-0135	Dallas	Brain LaMee (sample)	someone_b@example
Affordable Equipment (sample)	555-0162	Santa Cruz	Cat Francis (sample)	someone_c@example
Amazon Co Ltd		Tucson		
Apple Inc.		Cupertino		
Basic Company (sample)	555-0174	Yonkers	Cathy Cook (sample)	someone_d@example

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Page 1

J Evo Travel

Primary Contact
Credit Limit

Preferred Meth... Any
Annual Revenue \$250,000.00

Owner Kelly Todd

Click on a photo to see social network updates and email messages from this person.

Search cannot return results for this view. Click here for more information.

Using D&B360 Rest of World

On the **D&B360 Rest of World** area for an account, the Latest News about a company and its management displays. You can also set alerts to receive email notifications about news and management changes for a specific company. Click a news heading link to open that story in a new window.

The screenshot shows the 'D&B360 Rest of World' page. At the top, there's a 'Latest News' section with three articles. A callout bubble points to a link in the first article saying 'Click a link to open the story.' To the right is an 'Alerts' section with a toggle set to 'OFF' and a 'Manage Alerts' button. Below the toggle is a list of five personnel changes, each with a person icon, name, status, and date.

▼ D&B360 Rest of World

Latest News

Alerts **OFF** [Manage Alerts](#)

Interview: Deepak Giridharagopal on Puppet, Immutable Systems with PuppetDB InfoQ 06-Feb-2014
 Bio Deepak Giridharagopal is Director of Engineering at Puppet Labs and the lead engineer for PuppetDB. Prior to joining Puppet Labs, he was Principal Engineer at Dell/MessageOne, using Clojure to manage and monitor thousands of production systems. Code Mesh London is an annual conference dedicated to non-mainstream technologies. In 2013 it featured talks from over 50 inventors

Dell Shows Proof-Of-Concept 64-Bit ARM Server Tech Week Europe 06-Feb-2014
 Dell has developed an ARM-based proof-of-concept microserver that company officials hope will help expand the ecosystem around 64-bit ARM server processors. The system is being housed at the Dell Solutions Centre in Texas and can be remotely accessed by organisations and programmers for testing and development, Stephen Rousset, director of Data Centre Solutions (DCS) at Dell, said in a

Dell's Latest Laptop Runs Windows 8, OSX The Digital Reader 05-Feb-2014
 Dell has been working strenuously to reinvent itself ever since it went private last year, and that includes trying products that no one else would consider. While many device makers have tried combining Windows and Android, Windows and Windows Mobile/Phone, or some other combination of disparate OSes, Dell went in an entirely different direction. Take the new XPS 15 laptop, for

Thomas W Sweet **MOVED** to Chief Financial Officer 24-Jan-2014

Brian Gladden, Chief Financial Officer **LEFT** 24-Jan-2014

Bill Rodrigues **MOVED** to President, North America 18-Nov-2013

Paul Henri Ferrand, President **LEFT** 18-Nov-2013

Greg Davis **MOVED** to Vice President of Software and Peripherals 18-Nov-2013

Steve Felice, Chief Commercial Officer **LEFT** 15-Nov-2013

Setting Alerts

If you have already set alerts, the **On** button displays next to **Alerts**. If you haven't set alerts, the **Off** button displays next to **Alerts**. To set alerts:

1. On a D&B360 Account page, click **D&B360 Rest of World**.
2. On the **D&B360 Rest of World** area, click **Alerts** to set up your email alerts.

This screenshot shows the 'Alerts' section of the 'D&B360 Rest of World' page. The 'Alerts' button is highlighted, and a callout bubble says 'Click Alerts.' The toggle is still set to 'OFF'.

▼ D&B360 Rest of World

Latest News

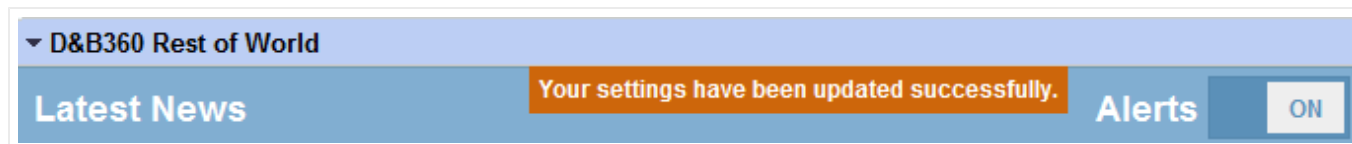
Alerts **OFF** [Manage Alerts](#)

3. In the window that opens, type or enter your information in the fields that display and select your **Time Zone**.

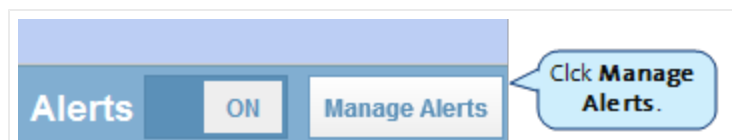
4. Click **Save Changes**.

The screenshot shows the 'Alerts' settings page. At the top, there is a blue bar with the word 'Alerts' and a toggle switch set to 'OFF'. A callout bubble points to the 'OFF' switch with the text 'Click **Off**.' Below this, a message states: 'We need some information to set up your email alerts.' The form contains the following fields: 'Your name' (two text boxes), 'Company' (one text box), 'Email' (one text box), and 'Time Zone' (a dropdown menu currently showing 'Eastern Standard Time'). A callout bubble points to the 'Time Zone' dropdown with the text 'Enter your criteria and select your **Time Zone**.' At the bottom of the form are 'Cancel' and 'Save Changes' buttons. A callout bubble points to the 'Save Changes' button with the text 'Click **Save Changes**.' In the background, a list of news items is visible, including 'Puppet, Immutable Deployments, Analyzing...', 'Thomas W Sweet MOVED to...', 'Brian Gladden, Chief Fin...', 'Will Rodrigues MOVED to...', 'Reg Davis MOVED to...', and 'Steve Felice, Chief Com...'. A red 'X' icon is visible over the user profile picture.

A message displays that your settings were updated, and the **Alerts** button changes to **ON**.



Managing Alerts and Triggers

1. On the **D&B360 Rest of World** area, click **Manage Alerts**.2. Click the **Manage My Alerts** tab to display **Your Alerts**.3. Next to a company name whose news you have subscribed to, click **Subscribed** to toggle to **Unsubscribed**.

– or –

Click **Unsubscribed** to toggle to **Subscribed**

▼ D&B360 Rest of World

◀ Back My Recent Alerts **Manage My Alerts** Manage My Company Triggers

powered by FirstRain

Your Alerts

Your Custom Daily Alert emails will be sent to arnolda@dnb.com and will include these companies.

Subscribed Dell Inc. Click **Subscribed** to toggle to **Unsubscribed**.

Click **Save Changes**.

Save Changes Cancel

4. Click **Manage My Company Triggers** to specify the type of information about a company that you want to receive in your news alerts.
5. Next to each trigger, click **Active** to toggle to **Inactive**.
– or –
Click **Inactive** to toggle to **Active**.
6. Use the scroll bar to display all of the triggers.
7. Click **Save Changes**.

▼ D&B360 Rest of World

◀ Back My Recent Alerts Manage My Alerts **Manage My Company Triggers**

powered by FirstRain

Click **Save Changes**.

Your custom company alerts will focus on developments related to the following business triggers.

Save Changes Cancel

TRIGGERS FOR COMPANY ALERTS

Inactive	Market Share Information
Active	Customer Wins or Losses
Active	M&A and Spin-offs

Click **Active** to toggle to **Inactive**.


Identifying D&B360 Standard Options and Icons









D&B360 provides standard icons and link options that make it easy for you to access and understand the information you need.

D&B Standard Options

D&B360 Options	Description
D&B Data	Allows you to change or remove D&B data (including company, contact, and lead data) about an existing account, or to add D&B data to an account in your database that does not yet include D&B data.
D&B360 Refresh	Imports the most current D&B data for a specific account and performs a stare and compare for the data in the Account object compared to the D&B360 object.
D&B360+	Displays all of the D&B data licensed by the company for a specific account. Data is only for the company and does not include contact or lead/opportunity information.
D&B Contacts	Searches for contacts associated with a D-U-N-S Number or Company Name and create leads/opportunities or contacts from them.
D&B360 View	Identifies related accounts within your Account object. You can also bring in family members for cross-sell opportunities.
D&B Look-A-Like	Searches for other companies that have similar attributes to their best customers.
D&B Competitors	Accesses a list of competitors, assembled by D&B's editorial team, that are associated with a D-U-N-S Number or Company. You can use this list for creating accounts, contacts, or leads/opportunities.
D&B Industry	Searches for industry profiles associated with a D-U-N-S Number or Company to quickly gain powerful insight that accelerates the sales cycle. Industry profiles are powered by First Research industry experts
D&B Financials	Searches for additional financial data specific to your D&B360 accounts such as annual income statements, growth rates, per share data, and more associated with a D-U-N-S Number or Company.

D&B Standard Icons

Icon	Description
	The yellow circle indicates that you need to update or refresh the window.

	The gray circle indicates that you do not need to refresh the window
	A yellow triangle with the letter A indicates an existing account. Click this icon to view that account.
	A yellow triangle with the letter C indicates an existing contact. Click this icon to view that contact.
	A yellow triangle with the letter L indicates an existing lead. Click this icon to view that lead.
	Use the pencil icon to merge the details from a D&B Contact with a contact that has previously been set up.
	The green light indicates accounts that are considered a low risk of paying their bills in a delinquent manner over the next 90 days.
	The yellow light indicates accounts that are considered a medium risk of paying their bills in a delinquent manner over the next 90 days.
	The red light indicates accounts that are considered a high risk of paying their bills in a delinquent manner over the next 90 days.






3 Creating a New Account in D&B360

D&B360 makes it easy for you to create a new account. You can leverage D&B data with D&B360 searches that give you targeted lists to work with.

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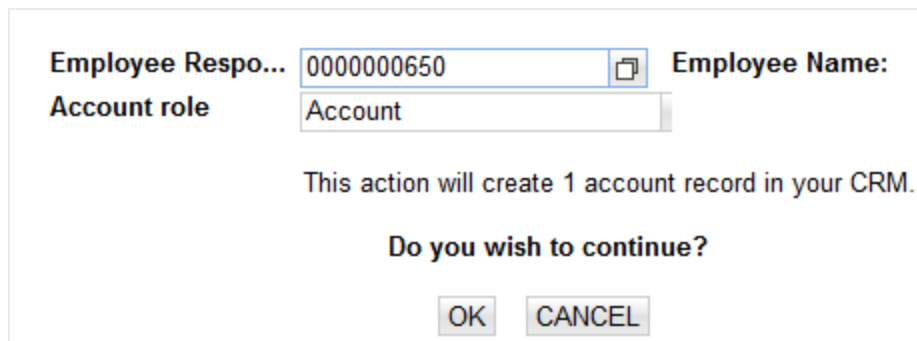
Note the following:

- ★ A gold star displays next to the first record and represents the Best Match found based on your search criteria. The more details you provide, the better the results.
-  A yellow triangle with the letter A indicates an existing account.
-  A yellow triangle with the letter C indicates an existing contact.
-  A yellow triangle with the letter L or O indicates an existing lead or opportunity.

Note: When you click or select the name of a company, a **Company Overview** window opens that displays details about that company including D-U-N-S number, name, location, address, a synopsis, and more.

Note: To export Company Results to an Excel or other spreadsheet program on your local directory, click the spreadsheet icon.

After you create or add a new account, the **Confirmation Message to Create Accounts** window will open. Click **OK** to add this account, or click **Cancel** if you do not want to add this record to your CRM.



The dialog box contains the following fields and text:

- Employee Respo...**: Text input field containing "0000000650" with a copy icon to its right.
- Employee Name:**: Text input field.
- Account role**: Dropdown menu showing "Account".
- Text: "This action will create 1 account record in your CRM."
- Text: "Do you wish to continue?"
- Buttons: "OK" and "CANCEL".

Creating a New Account Using Name and Address

You can run a search using a name and address, then create an account based on the search results.

1. From the **D&B360** menu, click **Accounts with D&B360**.



2. (Required) In the **Company Name** field, type the company name.
3. (Required) In the **Country** and **State/Province** fields, use the menu to select the correct information.
4. (Optional) In the **City**, **Address**, **Phone**, and **Postal Code** fields, type this information if you have it.
5. Click **Search** to display a list of candidates based on your search criteria.

Account Search
D&B Account Search

Company Name * Dell Country * United State

City State/Province * Texas

Address Postal Code

Phone

Search

Click Search.

6. Select the appropriate row and click **Create Account** to select the company that best matches your search criteria.

Account Search
D&B Account Search

Company Name * Dell Country * US

City Round Rock State/Province * TX

Address 1 Dell Way Postal Code

Phone

Search

⚠ = Existing Account ⚠ = Existing Contact ⚠ = Existing Lead

Match Info	Company	Address	City	State/Pro	Country	Postal Code	Phone
*****5195	★ ⚠ ⚠ DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(512) 338-4400
*****5955	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	
*****0088	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(877) 717-3355
*****1781	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	
*****7503	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(512) 338-4400

1 - 5 of 5

Click Create Account

Create Lead Create Account


If you want to review the match information before you make a decision, do not click **Create**. Instead, see the following steps.

★ A gold star displays next to the first record and represents the Best Match found based on your search criteria. The more details you provide, the better the results.

Review the match information before you make a decision, complete these steps:

1. Next to the match candidate that you selected, click **Match Info**.




The D&B Match information provides additional insight into how that D-U-N-S Number was matched to the company entered.





Account Search
 D&B Account Search

[About D&B360](#)

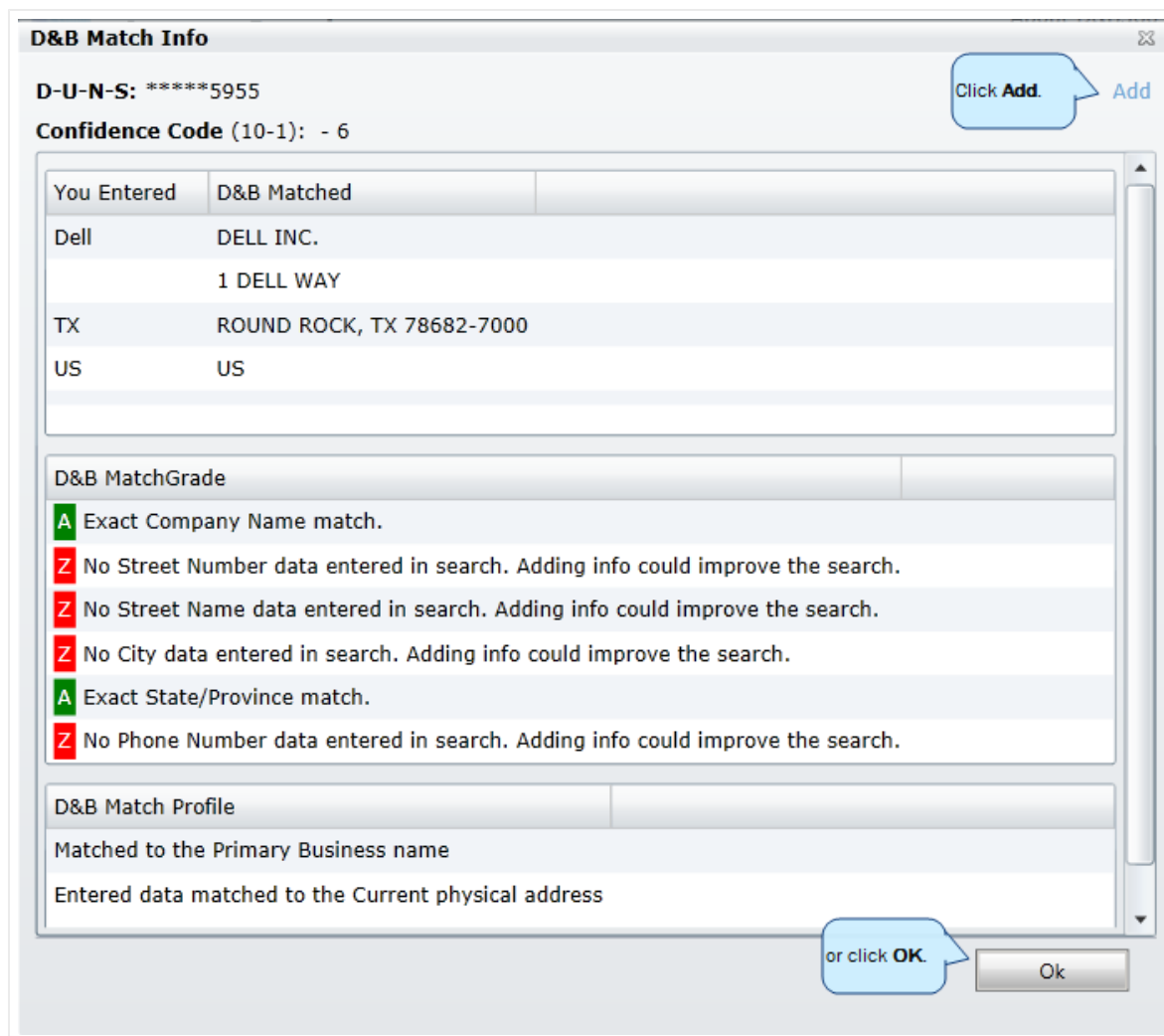
Company Name *
 City
 Address
 Phone

Country *
 State/Province *
 Postal Code

 = Existing Account
  = Existing Contact
  = Existing Lead

Match Info	Company	Address	City	State/Province	Country	Postal Code	
*****5195	★   DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	
*****0092	DELL	5015 WESTHEIMER RD # K120	HOUSTON	TX	US	77056	
*****9417	DELL CORPORATION	8200 N MO PAC EXPY STE 185	AUSTIN	TX	US	78759-8866	
*****5917	DELL	805 CASHEW LN	CEDAR PARK	TX	US	78613-3209	
*****0769	DELL INC.		DALLAS	TX	US	75389-0001	
*****2720	DELL INC.		DALLAS	TX	US	75312-0001	
*****0245		950 LOMA VERDE DR	EL PASO	TX	US	79936-7899	
*****1567		701 E PARMER LN	AUSTIN	TX	US	78753-3520	
*****5955	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	
*****0088	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	
*****5046	DELL INC.	13301B MCCALLEN PASS	AUSTIN	TX	US	78753-5303	
*****2774	DELL INC		DALLAS	TX	US	75267	

2. Review the match information.
3. If you want to add this account, click **Add**.



D&B Match Info

D-U-N-S: *****5955

Confidence Code (10-1): - 6

You Entered	D&B Matched
Dell	DELL INC. 1 DELL WAY
TX	ROUND ROCK, TX 78682-7000
US	US

D&B MatchGrade

- A** Exact Company Name match.
- Z** No Street Number data entered in search. Adding info could improve the search.
- Z** No Street Name data entered in search. Adding info could improve the search.
- Z** No City data entered in search. Adding info could improve the search.
- A** Exact State/Province match.
- Z** No Phone Number data entered in search. Adding info could improve the search.

D&B Match Profile

Matched to the Primary Business name

Entered data matched to the Current physical address

Click **Add.** **Add**

or click **OK.** **Ok**

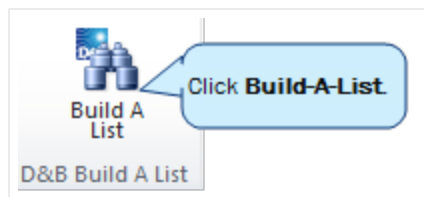
– OR –

To close the window without adding this account, click **OK**.

Creating a D&B360 Account Based on a List of Criteria

You can create an account by building a list of the available options that you locate using unique and specific search criteria:

1. From the **D&B360** tab, click **Build-A-List**.



Several categories of information display, each of which provides specific criteria that you can select for your search.

2. Enter the search criteria.
3. In the **Company Results** area, click **Company Search**.

The screenshot shows the 'Build A List' search interface in D&B360. The interface is divided into sections for search criteria. The 'Company location' section is expanded, showing options for Country (United States, Albania, Algeria), US State/CAN Province (South Carolina, South Dakota, Tennessee, Texas), US Metropolitan Area (10180 - Abilene, 10380 - Aguadilla, 10420 - Akron, C), Global State/Province, City, and Zip/Postal Code. A blue callout box with the text 'Click Company Search' points to the 'Company Search' button at the bottom right. The 'Company Search' button is highlighted in blue.

4. Next to the account that you want to use for your search, click to select the check box.
5. To create the new account, click **Create**.
6. To export company results to an Excel spreadsheet on your local directory, click the Excel icon.

Build A List About D&B360

Search People Results Company Results

Saved Search

= Existing Account = Existing Contact = Existing Lead

<input type="checkbox"/>	<input type="checkbox"/>	D-U-N-S	Company	Address	City	State/Prov
<input type="checkbox"/>	<input type="checkbox"/>	*****5763	Dell Products L.P.	1 Dell Way	Round Rock	TX
<input type="checkbox"/>	<input type="checkbox"/>	*****3487	Dell USA L.P.	1 Dell Way	Round Rock	TX
<input type="checkbox"/>	<input type="checkbox"/>	*****7546	Denichi Computer Devices, Inc	13200 Pond Springs Rd A102	Austin	TX
<input type="checkbox"/>	<input type="checkbox"/>	*****6895	Entorian Technologies Inc.	8900 Shoal Creek Blvd.	Austin	TX
<input type="checkbox"/>	<input type="checkbox"/>	*****4460	First E-Commerce, Inc.	8619 Wall St	Austin	TX
<input type="checkbox"/>	<input type="checkbox"/>	*****4252	GDM INTERNATIONAL SERVIC	3306 Clawson Rd	Austin	VA
<input type="checkbox"/>	<input type="checkbox"/>	*****8834	Gen P Dell Corp	1 Dell Way	Round Rock	TX
<input type="checkbox"/>	<input type="checkbox"/>	*****0110	Ghrei LLC	8210 Asmara Dr	Austin	TX
<input type="checkbox"/>	<input type="checkbox"/>	*****5542	Green Apple Vending, LLC	141 Park Place Dr	Georgetown	TX
<input type="checkbox"/>	<input checked="" type="checkbox"/>	*****8428	Hewlett-Packard Company	3301 Hibbetts Rd	Austin	TX
<input type="checkbox"/>	<input type="checkbox"/>	*****2142	Infocom Systems Inc	9514 Mcneil Rd Ste 102	Austin	TX

1 - 41 of 41 (1 selected)

Page 1 of 1

For more information about specific category details, [See "Using Build a List" on page 7-1](#). You will not use the People section for company searches.

Note: A yellow status indicator displays when an account is being created. A green status indicator displays when the account is created.

Criteria Categories

You can run a search based on criteria in one or more categories, which expand when you first select them (not shown in previous illustration).

For specific information that you can enter within each of these categories, [see "Using Build a List" on page 7-1](#).

Links to this specific category details section are provided below to identify the information collected for:

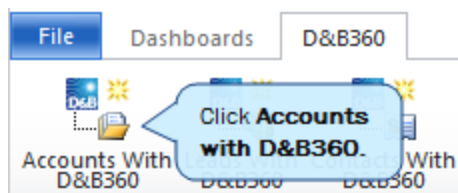
- [Company location](#)
- [Company size](#) (and more size criteria)
- [Industry](#)
- [Company type](#)
- [Financial data](#)

- [Key numbers](#)
- [US IPO data](#)
- [Special criteria](#)

Creating a D&B360 Account Based on Attributes of a Specific Account

You can create a list of companies that share the attributes of an existing account. You can then choose an account from that list and create a new account.

1. From the **D&B360** menu, click **Accounts with D&B360**, or from the left menu, select **Customers -> Accounts**.



2. In the list that displays, click to select an account.
The **Account Details** window for that account opens.
3. To open **Build-A-List** with account detail information for that account, click **D&B Look-A-Like**.



4. In the **Build-A-List** window, click **Company Search**.

Note: Attributes of the original account you selected will populate the search fields. To obtain better search results, we recommend that you examine, alter, or add criteria information.

5. Click to select the check box for the account that is similar to your original one.
6. Click **Create**.

	Create Account	Create Lead	D-U-N-S	Company	Address	City	State/Province	Country
	<input type="checkbox"/>	<input type="checkbox"/>	*****2532	Hewlett-Packard Company	3000 Hanover St.	Palo Alto	CA	US

The new account is created.

Note: A yellow status indicator displays when an account is being created. A green status indicator displays when the account is created.

Creating a D&B360 Account from Records Related to Existing Accounts

You can create a new account by identifying Family Tree accounts or other existing accounts and using them as the basis for your search.

1. From the **D&B360** menu, click **Accounts**, or from the left menu, select **Customers - > Accounts**.



2. From the list that displays, click to select an account that you want to pursue.

The **Account Details** window for that account opens.

3. To display the **Related Accounts** window, click **D&B360 View**.



4. To enter family tree information, click **Family Tree Query** or **Family Tree Hierarchy**.

D&B360 View Dell Inc. [About D&B360](#)

Related Accounts | **Family Tree Query** | Family Tree Hierarchy

Search for related family members in the full Family Tree. Import companies as Accounts.

Account Name	Dell Inc.	Ultimate Name	Dell Inc.
D-U-N-S	114315195	imate D-U-N-S	114315195

Tree Levels ⓘ 2 ▼

Location ⓘ ☒ Country of Global Ultimate ☒ Other Countries

Type ⓘ ☒ Subsidiaries ☐ Branch

Click **Search.**

Note: The Family Tree Hierarchy provides the same information as the Family Tree Query in a graphical display based on corporate family relationships.

5. After you select the **Family Tree Query** or **Family Tree Hierarchy** tab, you can filter your search as follows:
 - a. In the **Tree Levels** field, select the number of levels for your search, from 1 to 26.
 - b. Select the **Country of Global Ultimate** check box to search for the top, most important, responsible entity within the corporate family tree.
 - c. Select the **Other Countries** check box to search for related family members in other countries. This search will include the country of the Global Ultimate DUNS. If you leave it unselected, only those companies in countries outside of the Global Duns Country display. If you select only this check box, only companies that exist in the same country as the Global Ultimate DUNS display.
 - d. To receive all records, leave both selected.
 - e. Select the **Subsidiaries** check box to search for a corporation that is more than 50% owned by the parent company, but has a different legal business name from its parent company.
 - f. Select the **Branch** check box to search for any secondary locations of a company's headquarters. Branches have no legal responsibility for the parent company's debts, even though bills may be paid from the branch location.
6. Make sure the filtering criteria you selected is what you want, and then click **Search**.

D&B360 View
Dell Inc.

Related Accounts | **Family Tree Query** | Family Tree Hierarchy

Search for related family members in the full Family Tree. Import companies as Accounts.

Account Name Dell Inc.
D-U-N-S 114315195

Global Ultimate Name Dell Inc.
Global Ultimate D-U-N-S 114315195

Tree Levels 2

Location ☒ Country of Global Ultimate ☒ Other Countries

Type ☒ Subsidiaries ☐ Branches

Search


= Existing Account = Existing Contact = Existing Lead

<input type="checkbox"/>	<input type="checkbox"/>	D-U-N-S	Company	City	State	Country	Location Status
<input type="checkbox"/>	<input type="checkbox"/>	*****5195	DELL INC.	ROUND RC	TX	US	
<input type="checkbox"/>	<input type="checkbox"/>	*****4492	DELL FINANCIAL SERVICES L.F.	AUSTIN	TX	US	ParentSubsidiary
<input type="checkbox"/>	<input type="checkbox"/>	*****3092	DELL CORPORATION	SKOKIE	IL	US	ParentSubsidiary
<input type="checkbox"/>	<input type="checkbox"/>	*****5029	DCC EXECUTIVE SECURITY INC.	ROUND RC	TX	US	ParentSubsidiary
<input checked="" type="checkbox"/>	<input type="checkbox"/>	*****3827	WYSE TECHNOLOGY INC.	SAN JOSE	CA	US	ParentSubsidiary
<input type="checkbox"/>	<input type="checkbox"/>	*****9994	DELL INTERNATIONAL INCOR Also Trades as: DELL COMPUTE	ROUND RC	TX	US	ParentSubsidiary

1 - 50 of 77 (1 selected)

Page 1 of 2

Click Create. **Create**

7. To identify the accounts you want to create, select the corresponding check boxes. If the record is already in your database as an account, the yellow account icon  will display next to that account.
8. Click **Create**, and then wait until the status indicator displays in green.

Note: A yellow status indicator displays when an account is being created. A green status indicator displays when the account is created.


Reviewing Results when Searching by Family Tree Hierarchy

You can use **Family Tree Hierarchy** tab to run a search similar to the **Family Tree Query**. However, the results for a Family Tree Hierarchy search display in a tree structure.

You will still be able to filter the list on Country or Global Ultimate, or Other Countries by clearing the check marks. To receive all records, leave both selected.

You can also filter on Subsidiaries only or add in Branch records and choose how many levels of the tree you want to receive from the Global Ultimate.

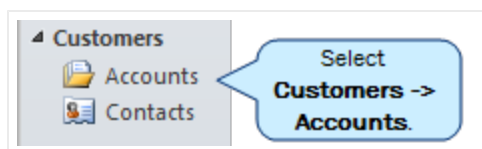
9. Complete these steps to search by Family Tree Hierarchy:
10. Make sure you have selected the filtering criteria that you want to filter on.
11. Click **Search**.
12. To identify the accounts that you want to create, click the corresponding check boxes.

If a search result record is already in your database as an account, the duplicate account icon — a  — will display next to that account.

Creating a D&B360 Account from Competitors

Use this feature to identify the competitors to your accounts and then add them to your CRM for nurturing. You can also create leads from competitors. For more information, [see "Creating a Lead from a Competitor" on page 6-14.](#)

1. From the left menu, select **Customers -> Accounts**.



2. In the list that displays, click to select an account.

The **Account Details** window for that account opens.

- To display a list of competitors, click **D&B Competitors**.

The **Competitors List** for that account displays.

Competitors List About D&B360

Competitors for Dell Inc.

Matching Companies: 28 1 Records Selected

= Existing Account
 = Existing Contact
 = Existing Lead

<input type="checkbox"/> Create Account	<input type="checkbox"/> Create Lead		D-U-N-S	Company Name	City	State/Prov	Country	Annual Sales	Is Top Competitor
<input type="checkbox"/>	<input type="checkbox"/>		*****1980	Positivo Informática S.A.	Curitiba	Paraná	Brazil	\$1,114.95	
<input checked="" type="checkbox"/>	<input type="checkbox"/>		*****4795	Lenovo Group Limited			Hong Kong	\$29,574.44	
<input type="checkbox"/>	<input type="checkbox"/>		*****9493	HCL Infosystems Limited	Noida	Uttar Pradesh	India	\$2,408.32	

Click **Create** Create

- To add a company to your accounts list, select the corresponding box under the **Account** tab.
- Click **Create**.






4 Enriching Accounts with D&B360

With D&B360 you can leverage D&B data to enrich your account information. In addition you can use information from public sources to verify or enrich your account information.

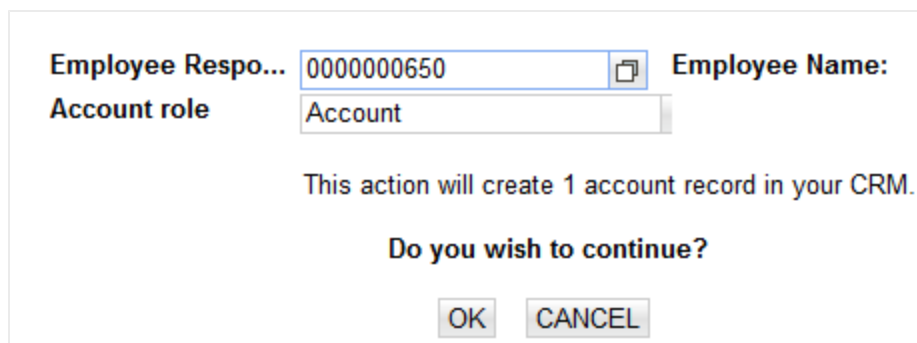
Leveraging ROW	4-2
Adding D&B Data to an Existing Account	4-2
Identifying Related Accounts in D&B	4-4
Finding Industry Information about Existing Accounts	4-5
Adding Industry Information to an Existing Account	4-6
Leveraging Industry Information	4-8
Adding Financial Information to Existing Accounts	4-10

Note the following:

- ★ A gold star displays next to the first record and represents the Best Match found based on your search criteria. The more details you provide, the better the results.
-  A yellow triangle with the letter A indicates an existing account.
-  A yellow triangle with the letter C indicates an existing contact.
-  A yellow triangle with the letter L or O indicates an existing lead or opportunity.

Note: When you click or select the name of a company, a **Company Overview** window opens that displays details about that company including D-U-N-S number, name, location, address, a synopsis, and more.

After you create or add a new account, the **Confirmation Message to Create Accounts** window will open. Click **OK** to add this account, or click **Cancel** if you do not want to add this record to your CRM.



Employee Respo... 0000000650 Employee Name:

Account role Account

This action will create 1 account record in your CRM.

Do you wish to continue?

OK CANCEL

Leveraging ROW

You can use Rest of World (ROW) as an information source for news about a company and link to news stories directly from the windows where you are working. For more information, [see "Leveraging ROW" on page 4-2.](#)

Adding D&B Data to an Existing Account

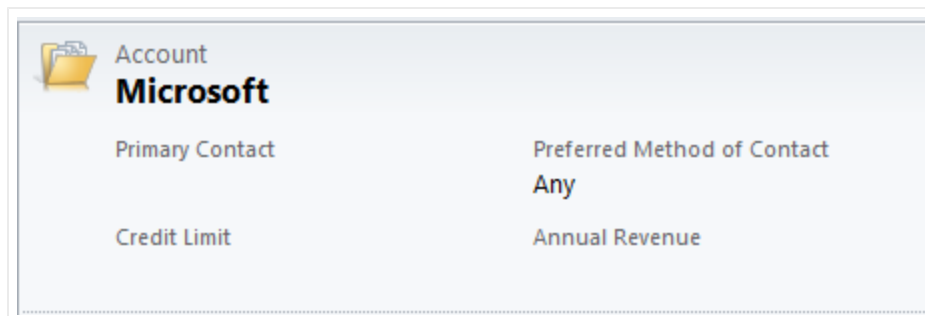
D&B data is comprehensive and detailed. If you have an existing account with incomplete information, the quickest way to enhance it is to add D&B Data.

1. From the left menu, select **Customers - > Accounts**.



2. In the list that displays, click to select an account.

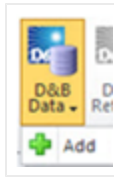
The **Account Details** window for that account opens.



Account
Microsoft

Primary Contact	Preferred Method of Contact
	Any
Credit Limit	Annual Revenue

3. To add D&B data to that account, select **D&B Data -> Add**.



4. In the **Account Search** window, identify the company you want to add D&B Data too, then click **Select**.

Account Search [About D&B360](#)

D&B Account Search

Company Name * Country *

City State/Province *

Address Postal Code

Phone

= Existing Account
 = Existing Contact
 = Existing Lead

Match Info	Company	Address	City	State/Prov	Country	Postal Code	Phone
*****9822	MICROSOFT CORP	380 PORTAGE AVE	PALO ALTO	CA	US	94306-2244	(650) 693-3521
*****4867	MICROSOFT	2840 EMERSON ST	PALO ALTO	CA	US	94306-2350	(650) 693-3363


1 - 2 of 2

Page 1 of 1

Click **Select**

5. In the **Add D&B Data** window, identify which data you want to use to update the account and clear any data you do not want to include.
6. Review each new value to identify which data you want to use, then click to select it for the update.
7. To update your account with the selected D&B data, click **OK**.

Add D&B Data About D&B360

 **Add D&B Data**
Choose data to migrate into the account.

Field	CRM Data	D&B Data	Override Value
Account Name	<input type="radio"/> Microsoft	<input checked="" type="radio"/> Microsoft Corp	<input type="text"/>
Account Description	<input type="radio"/>	<input checked="" type="radio"/> Nonclassifiable establish	<input type="text"/>
Number of Employees	<input checked="" type="radio"/> 0	<input type="radio"/> 0	<input type="text"/>
Address 1: Street 1	<input type="radio"/>	<input checked="" type="radio"/> 380 Portage Ave	<input type="text"/>
Address 1: City	<input type="radio"/>	<input checked="" type="radio"/> Palo Alto	<input type="text"/>
Address 1: State/Province	<input type="radio"/> Washington	<input checked="" type="radio"/> CA	<input type="text"/>
Address 1: ZIP/Postal Code	<input type="radio"/>	<input checked="" type="radio"/> 94306-2244	<input type="text"/>
Address 1: Country/Region	<input type="radio"/>	<input checked="" type="radio"/> US	<input type="text"/>
Address 1: Phone	<input type="radio"/>	<input checked="" type="radio"/> (650) 693-3521	<input type="text"/>
Address 2: Street 1	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>
Address 2: City	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>
Address 2: State/Province	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>
Address 2: ZIP/Postal Code	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>
Address 2: Country/Region	<input checked="" type="radio"/>	<input type="radio"/>	<input type="text"/>
Revenue	<input type="radio"/>	<input checked="" type="radio"/> 0	<input type="text"/>
SIC	<input type="radio"/>	<input checked="" type="radio"/> 9999	<input type="text"/>

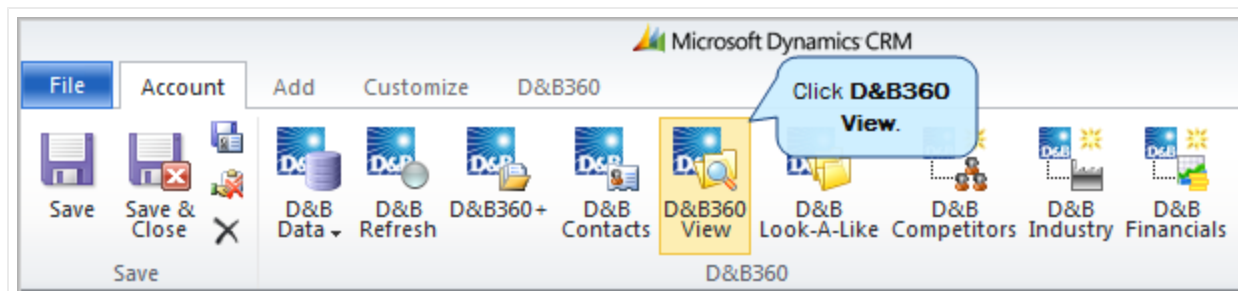
Click **OK**.

Identifying Related Accounts in D&B

1. From the left menu, select **Customers - > Accounts**.



2. From the list that displays, click to select an account. The **Account Details** window for that account opens.
3. To open the **Related Accounts** window for that account, click **D&B360 View**.



4. Enter your search criteria, and click **Search**.

D&B360 View [About D&B360](#)

Dell Inc.

Related Accounts | **Family Tree Query** | Family Tree Hierarchy

The page provides a view into your accounts that are related through legal corporate ownership. All of the companies have the same global ultimate record. If you would like to see the full family tree, including the members not currently a part of your account list, go to the Family Tree Query tab.

Global Ultimate Name Dell Inc.
Global Ultimate D-U-N-S 114315195

D-U-N-S	Account Name	State	Active Opportunities	Closed Opportunities	Account Owner	Risk Level*	
114315195	Dell Inc.	TX	0	0	Product Team	Green	
114315195	Dell Inc.	Texas	0	0	Small Business 2	Green	
619151033	Dell Inc.	California	0	0	Product Team	Green	
114544901	Dell Corporation	Illinois	0	0	Small Business 2	Yellow	
114315195	Dell Inc.	Texas	0	0	Product Team	Green	
114315195	Dell Inc.	Texas	0	0	Sales Engineer 1	Green	
121482657	ASAP Software Express, Inc.	Illinois	0	0	Product Team	Green	
152145046	Dell Inc.	Texas	0	0	Hoovers Team	Green	
114315195	Dell Inc.	Texas	0	0	Product Team	Green	

* Available on US based companies only.

Note: To become more familiar with the data, find a specific related account, or to prepare to add one of the listed accounts as a new account, review the data in this window. Green, yellow, and red icons next to an account indicate its risk level. For more information, [see "Identifying D&B360 Standard Options and Icons" on page 2-7.](#)

Finding Industry Information about Existing Accounts

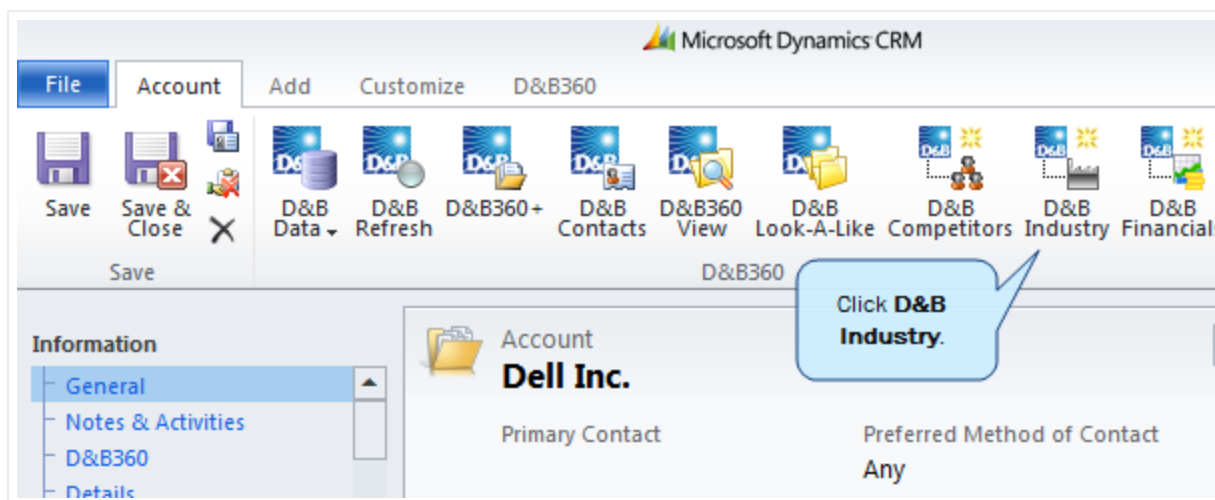
Industry Information powered by First Research is a valuable tool that can help you prepare for a sales call or customize a marketing message. By gaining perspective on a specific industry's business challenges and

opportunities, you can quickly gain important knowledge and insight. Each D&B360 account is mapped to related industries through their SIC code.

1. On the left menu, select **Customers -> Accounts**.



2. In the list that displays, click to select an account.
The **Account Details** window for that account opens.
3. Click **D&B Industry**.



The **D&B Industry** window for the account opens and displays a list of the account's related industries. If you don't see a related industry you believe should be included, you can add it ([see "Adding Industry Information to an Existing Account" on page 4-6](#)).

For more details about how to use this information, [see "Leveraging Industry Information" on page 4-8](#).

Adding Industry Information to an Existing Account

If you don't see the type of industry you are interested in already associated with the account, you can add an industry association.

1. Click **Add Industry**.

D&B Industry - Dell Inc.
powered by First Research

[About D&B360](#)

[Back to Account](#)

[Add Industry](#)

Industry Code	Industry Detail
1099	Computer Peripheral Equipment Manufacturing
1100	Computer Input Device & Speaker Manufacturing
1101	Computer Display & Projector Manufacturing
1103	Printing & Imaging Equipment Manufacturing
1105	Personal Computer Manufacturing
1106	Server & Mainframe Manufacturing
1119	Information Technology Services
1121	Computer Software
1843	Computer Manufacturing

[Add Industry](#)

Click **Add Industry**.

- In the **D&B Industry Search** window, you can enter a keyword to search on and click **Keyword**, or you can search by **SIC**, or **NAICS**.
- Click **Search**.

D&B Industry Search
powered by First Research

[About D&B360](#)

[Back to D&B Industry](#)

[Search for SIC or NAICS code](#)

Search by: ☒ Keyword ☐ SIC ☐ NAICS

[Search](#)

Click **Search**.

- Next to the industries that you want to associate with this account, click to select the corresponding boxes.

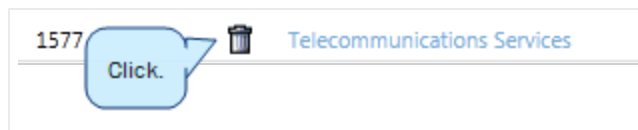
<input type="checkbox"/>	1584	Internet Service Providers Internet access and related services.
<input checked="" type="checkbox"/>	1577	Telecommunications Services voice, data, and video communications services.
<input type="checkbox"/>	1904	Internet Publishing, Broadcasting & Search Portals content on the Internet or operate search engine Web sites.
<input type="checkbox"/>	1099	Computer Peripheral Equipment Manufacturing Companies in this industry design and manufacture mice and other input devices, displays and projectors, and printing and imaging equipment. The industry also includes companies that design and manufacture automated teller machines (ATMs), point-of-sale (POS) systems, and other computer peripheral devices.
<input type="checkbox"/>	1980	Battery Manufacturing storage batteries.

Click **Associate**.

Associate

Note: If an industry is already associated with this account, a yellow warning sign displays next to it.

If you decide to remove an industry that you manually added to an account, click the trash can icon next to the industry code.



Leveraging Industry Information

D&B Industry Information from First Research provides Sales and Marketing users with deeper insight about industry drivers and how these might affect a company. The information available includes:

- Business challenges
- Call preparation questions
- Executive insight
- Glossary of acronyms
- Industry indicators
- Industry overview
- Industry web sites
- Trends and opportunities



The following illustration shows the types of industry details that display.

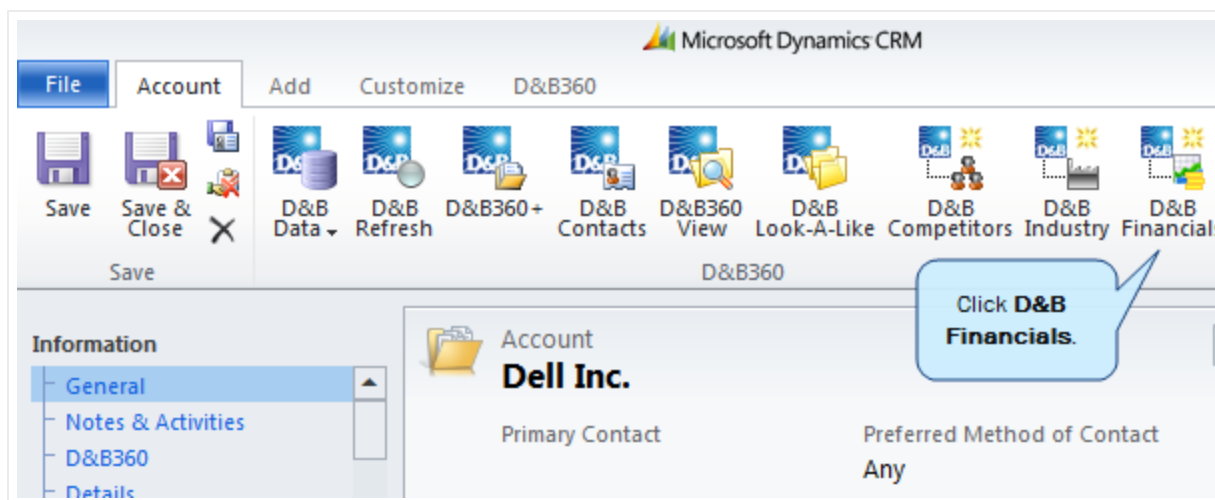


Adding Financial Information to Existing Accounts

1. From the left menu, select **Customers - > Accounts**.

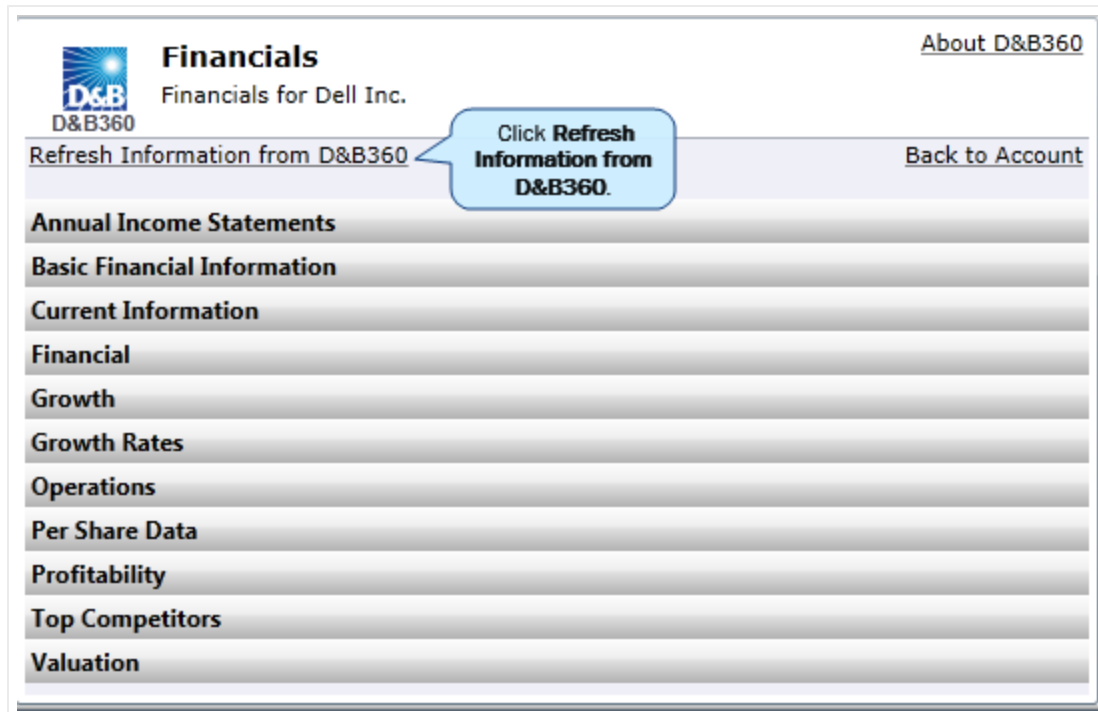


2. In the list that displays, click to select an account. The **Account Details** window for that account opens.
3. To open the **D&B Financials** window for this account, click **D&B Financials**.




Note: The amount of financial data available varies by company.

If this is the first time you are adding financial information to an account, the **Financials** window will have a link labeled **Add Information**. After you've added financial information to an account, the link is labeled **Import Information from D&B360**, as shown in the following illustration.



4. To drill farther down into the available information, click any of the categories that are listed in this window.







Financials
 Financials for Dell Inc.
 [About D&B360](#)

[Refresh Information from D&B360](#)
[Back to Account](#)

Annual Income Statements

Click to expand a category.

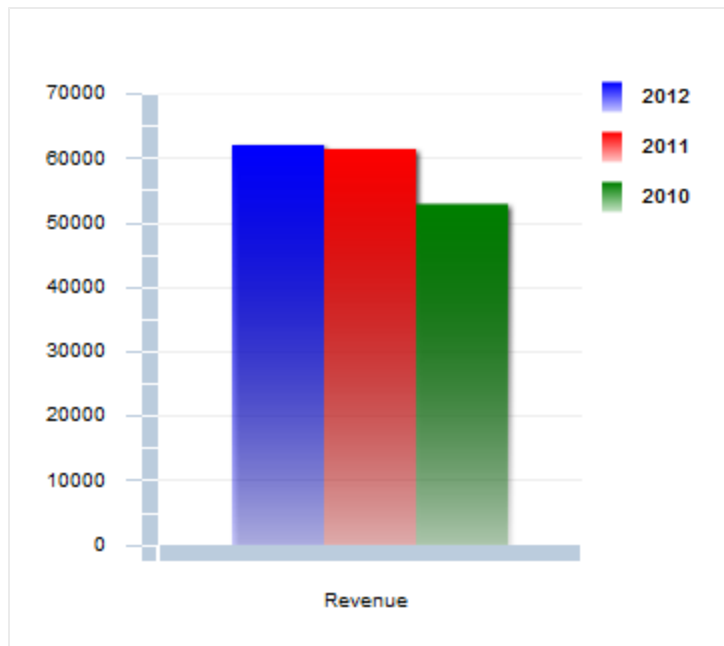
Click to view the data graphically.

Annual Income Statements	2012	2011	2010	
Diluted Eps	1.88	1.35	0.73	
Gross Profit	\$13,811.00M	\$11,396.00M	\$9,261.00M	
Operating Income	\$4,431.00M	\$3,433.00M	\$2,172.00M	
Revenue	\$62,071.00M	\$61,494.00M	\$52,902.00M	
Total Net Income	\$3,492.00M	\$2,635.00M	\$1,433.00M	

Basic Financial Information
Current Information
Financial
Growth
Growth Rates
Operations
Per Share Data
Profitability
Top Competitors
Valuation

- To view the data visually, click the chart icon.

A chart that includes the relevant data opens, as shown in the following illustration:








5 Adding Contacts with D&B360

With D&B360 you can leverage D&B data to enrich or add to your contact information. You can also use information from public sources to verify or enrich your contact information. You can add contacts to existing accounts and create leads/opportunities for new account opportunities, both of which are ways to enrich already established accounts.

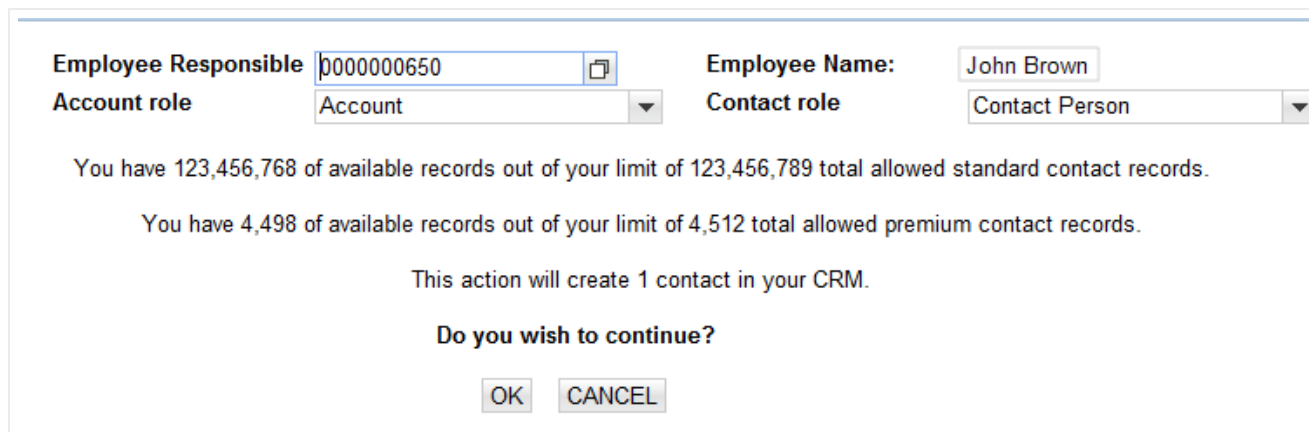
Person Biographies	5-2
Leveraging ROW	5-2
Adding a Contact from an Account Record	5-3
Adding a Contact from D&B360 Directly	5-4
Adding a Contact Using Build-A-List	5-7
Merging Contacts	5-9

Note the following:

- ★ A gold star displays next to the first record and represents the Best Match found based on your search criteria. The more details you provide, the better the results.
-  A yellow triangle with the letter A indicates an existing account.
-  A yellow triangle with the letter C indicates an existing contact.
-  A yellow triangle with the letter L or O indicates an existing lead or opportunity.

Note: When you click or select the name of a company, a **Company Overview** window opens that displays details about that company including D-U-N-S number, name, location, address, a synopsis, and more.

After you create or add a new contact, the **Confirmation Message to Create Contacts** window will open. Click **OK** to add this contact, or click **Cancel** if you do not want to add this record to your CRM.



The dialog box contains the following fields and text:

Employee Responsible	<input type="text" value="0000000650"/>	Employee Name:	<input type="text" value="John Brown"/>
Account role	<input type="text" value="Account"/>	Contact role	<input type="text" value="Contact Person"/>

You have 123,456,768 of available records out of your limit of 123,456,789 total allowed standard contact records.

You have 4,498 of available records out of your limit of 4,512 total allowed premium contact records.

This action will create 1 contact in your CRM.

Do you wish to continue?

Person Biographies



To display information about a contact, from a list of contacts, click the contact's name. The **D&B360 Person Biography** window opens and includes some or all of this information about that contact:

- Current employment including job title and name, address, and phone numbers of employer
- Employment profile
- Previous employment
- Employment history
- Compensation history

Leveraging ROW

You can use Rest of World (ROW) as an information source for news about a company and link to news stories directly from the windows where you are working. For more information, [see "Leveraging ROW" on page 5-2](#).

The D&B360 menu options and icon links display and remain on the menu as you navigate through the CRM.

Adding a Contact from an Account Record

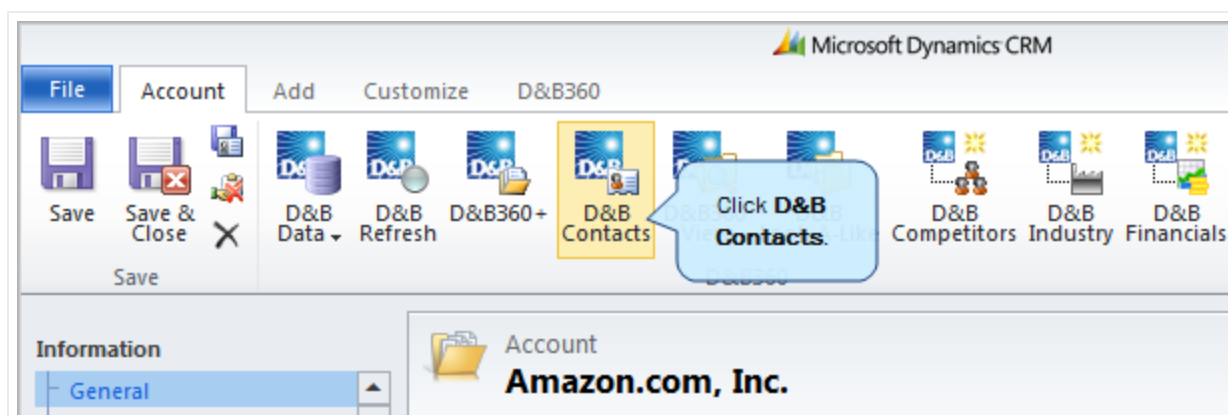
1. From the left menu, select **Customers -> Accounts**.



2. From the list that displays, click to select an account.

The **Account Details** window for that account opens.

3. To display a list of potential contacts, click **Contacts with D&B**.



The **D&B Contact Search** window opens.

4. Next to any contacts you want to add, click to select the check box.
5. To add the selected contacts, click **Create**.

Note: If you want to create multiple leads or contacts, select more than one record from the list that displays in this window. When you click **Create**, leads or contacts are created for all of the records you selected.

Contact Search
D&B Contact Search

Search by Contact Name
Contact Name

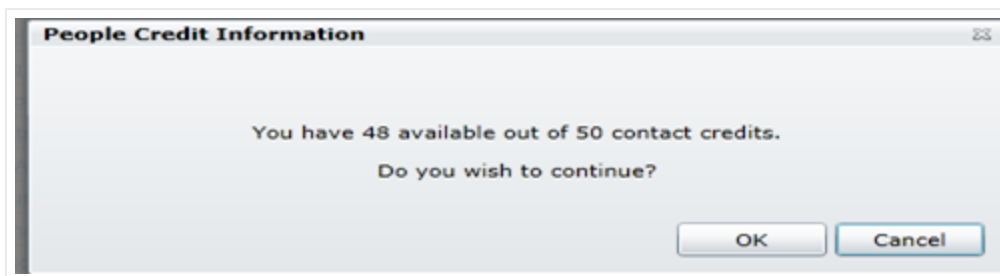
Search by Company Info
D-U-N-S Job Title
Company Name
Keywords

= Existing Account = Existing Contact = Existing Lead

<input checked="" type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Lead	Full Name ▲	Company Name	Title	Contact Details
<input checked="" type="checkbox"/>		<input type="checkbox"/>	Harry Patel	Amazon Co Ltd	President	Name & Title

1 - 1 of 1 (1 selected) Page 1 of 1

Note: When you click **Create** to create a new contact, the **People Credit Information** window opens to inform you of your current contact credits. To add the new contact, click **OK**. If you decide not to use your contact credit for that contact, click **Cancel**.



Adding a Contact from D&B360 Directly

- From the **D&B360** tab, click **Contacts with D&B360**.

Option #1: To contact candidates from a specific company, search **Company Information**.

- In the **Company Name** field, type the name of the company for your search criteria.
- Select any **Job Titles** that you want to include.
- Click **Search**.

Contact Search
D&B Contact Search

Search by Contact Name
Contact Name

Search by Company Info
D-U-N-S Job Title
Company Name
Keywords
 Click Search.

☐ Acquisitions
☐ Administration
☒ Business Development

4. In the **Create Contact** column, select the check box next to the contact you want to create, and then click **Create**.

Contact Search
D&B Contact Search

Search by Contact Name
Contact Name

Search by Company Info
D-U-N-S Job Title
Company Name
Keywords

☐ Acquisitions
☐ Administration
☒ Business Development

⚠ = Existing Account ⚠ = Existing Contact ⚠ = Existing Lead

<input type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Lead	Full Name ▲	Company Name	Title	Contact Details
<input type="checkbox"/>		<input type="checkbox"/>	Jakabne Iles Maria Mag	AMAZON Kereskedelmi Bt vegelsz	Kepviselo tag	Name & Title
<input checked="" type="checkbox"/>		<input type="checkbox"/>	Armin Woerle	AMAZON ENERGY LIMITED	Chief Finance Officer	Title
<input type="checkbox"/>		<input type="checkbox"/>	Mahboob Atiqi	Amazon Construction and Supply		
<input type="checkbox"/>		<input type="checkbox"/>	Revocatus Mwita	AMAZON PHARMACY COMPANY	Director General	Title
<input type="checkbox"/>		<input type="checkbox"/>	Ingemar Oscar Wilhelm	Amazon Zoologiska	Proprietor	Title

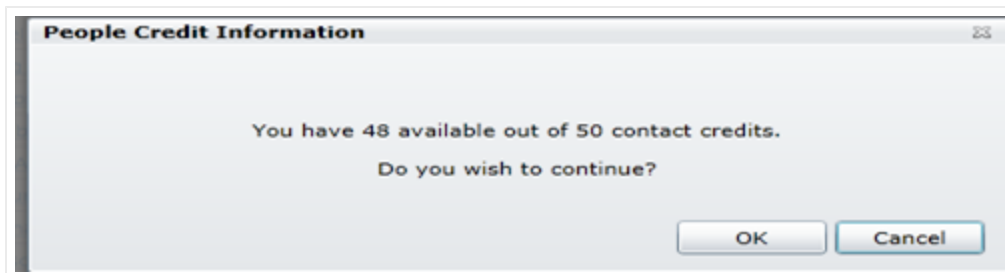
1 - 50 of 3679 (1 selected)

Page 1 of 74

Click Create.

Note: If you want to create multiple leads or contacts, select more than one record from the list that displays in this window. When you click **Create**, leads or contacts are created for all of the records you selected.

Note: When you click **Create** to create a new contact, the **People Credit Information** window opens to inform you of your current contact credits. To add the new contact, click **OK**. If you decide not to use your contact credit for that contact, click **Cancel**.



Option #2: To search for the name of an individual within a company, search **Contact Name**.

1. In the **Contact Name** field, type the contact name for your search criteria.
2. To run the search and display a list of possible contact, below the **Search by Contact Name** area, click **Search**.

3. To choose which contacts you want to create from this list, click to select the corresponding check boxes.
4. To associate the contacts with this company, click **Create**.

= Existing Account
 = Existing Contact
 = Existing Lead

<input type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Lead	Full Name ▲	Company Name	Title	Contact Details	
<input type="checkbox"/>		<input type="checkbox"/>	John T. Chambers	KANAWHA CITY MOTOR LODGE, IN	Pres & Treas	Name & Title	▲
<input type="checkbox"/>		<input type="checkbox"/>	John Chambers	Dr. John T. Chambers, MD	Prin	Name & Title	
<input type="checkbox"/>		<input type="checkbox"/>	John T. Chambers	Sysco Systems Inc	President	Name & Title & Email	
<input type="checkbox"/>		<input type="checkbox"/>	John Robert Chambers	J.T. CHAMBERS (CHATTERIS) LTD	Managing Director, Director	Name & Title	
<input type="checkbox"/>		<input type="checkbox"/>	Janet Patricia Chambers	B.C.T.C. LTD	Company Secretary	Name & Title	
<input type="checkbox"/>		<input type="checkbox"/>	John Robert Chambers	J.T. CHAMBERS (DEVELOPMENTS) LTD	Director	Name & Title	
<input type="checkbox"/>		<input type="checkbox"/>	Jane Carroll Chambers	G.T.C. (INTERNATIONAL TRADERS)	Company Secretary	Name & Title	
<input checked="" type="checkbox"/>		<input type="checkbox"/>	John T. Chambers	Cisco Systems, Inc.	Chairman and CEO	Name & Title	
<input type="checkbox"/>		<input type="checkbox"/>	John T. Chambers	CHAMBERS & CO (SOLICITORS) LTD	Director	Name & Title	
<input type="checkbox"/>		<input type="checkbox"/>	John Chambers	T.F. WOODSIDE & CO LTD	Principal	Name & Title	
<input type="checkbox"/>		<input type="checkbox"/>	Jon L. Christianson	Skadden, Arps, Slate, Meagher & F.	Partner, Mergers and Acqui	Name & Title	▼

1 - 25 of 25 (1 selected)

Page 1 of 1

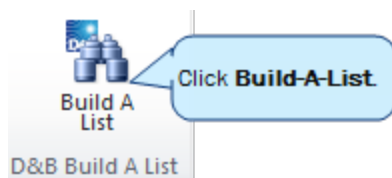
Click **Create**.

Note: If you want to create multiple leads or contacts, select more than one record from the list that displays in this window. When you click **Create**, leads or contacts are created for all of the records you selected.

Note: A yellow status indicator displays when an account is being created. A green status indicator displays when the account is created.

Adding a Contact Using Build-A-List

- From the **D&B360** menu, click **D&B360 Build A List**.



- In the **D&B360 Build A List** window, **People (Bio and Title Keyword, Job Title)** area, enter your search criteria.
- To display a list of candidates, click **People Search**.

Build A List About D&B360

Search People Results Company Results

Saved Search: -- None -- Save Current Search Most Recent Search

People (Bio and Title Keyword, Job Title)

Keyword(s) in: e.g. marketing or Harvard or ad sales. Title Bio Job Title

☐ Acquisitions
☐ Administration
☐ Business Development
☒ CEO

Company location (Country, US State/CAN Province, City and more)

Country: ☒ United State ☐ Albania ☐ Algeria

US State/CAN Province: ☐ Alabama ☐ Alaska ☐ Arizona ☐ Arkansas

US Metropolitan Area: ☐ 12220 - Aub ☐ 12260 - Aug ☒ 12420 - Aus

Global State/Province: e.g. Queensland or NY. Multiple entries should be separated by a comma with no spaces.

City: e.g. Madrid or New York. Multiple entries should be separated by a comma with no spaces.

Zip/Postal Code: e.g. 78701 or SW1P 1JA or SW1. Multiple entries should be separated by a comma with no spaces.

US/CAN Area Code: e.g. 512. Multiple entries should be separated by a comma with no spaces.

Area Around US Zip Code: Miles of Zip Code e.g. Find results within a 50 mile radius of a Postal Code (up to a maximum radius of 100 miles or 160 km). Use only one 5-digit ZIP code.

Click People Search. People Search Company Search

4. In the **Build A List** window, **People Results** list, select the contact you want to add , then click **Create**.

Build A List About D&B360

Search People Results Company Results

Saved Search: Save Current Search

= Existing Account = Existing Contact = Existing Lead

<input type="checkbox"/> Create Contact	<input type="checkbox"/> Create Lead	Full Name ▲	Company Name	Title	Contact Details	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Roger Acord	Heb	Prin	Name & Title	▲
<input type="checkbox"/>	<input type="checkbox"/>	Herbert Acord	Cypress Greek Holdings Ltd.	Prin	Name & Title	
<input type="checkbox"/>	<input type="checkbox"/>	Teresa Acosta	Ifren Tees	Prin	Name & Title	
<input type="checkbox"/>	<input type="checkbox"/>	Zachary Acosta	Zachary C Acosta Sr	Prin	Name & Title	▼

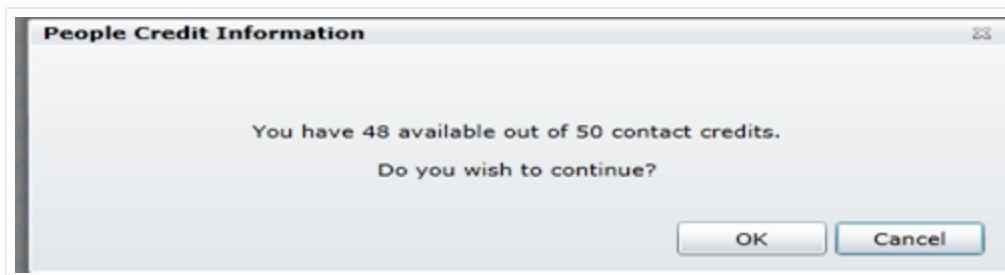
201 - 250 of 84765 (1 selected)

Page 5 of 1696

Click Create. Create

Note: If you want to create multiple leads or contacts, select more than one record from the list that displays in this window. When you click **Create**, leads or contacts are created for all of the records you selected.

Note: When you click **Create** to create a new contact, the **People Credit Information** window opens to inform you of your current contact credits. To add the new contact, click **OK**. If you decide not to use your contact credit for that contact, click **Cancel**.

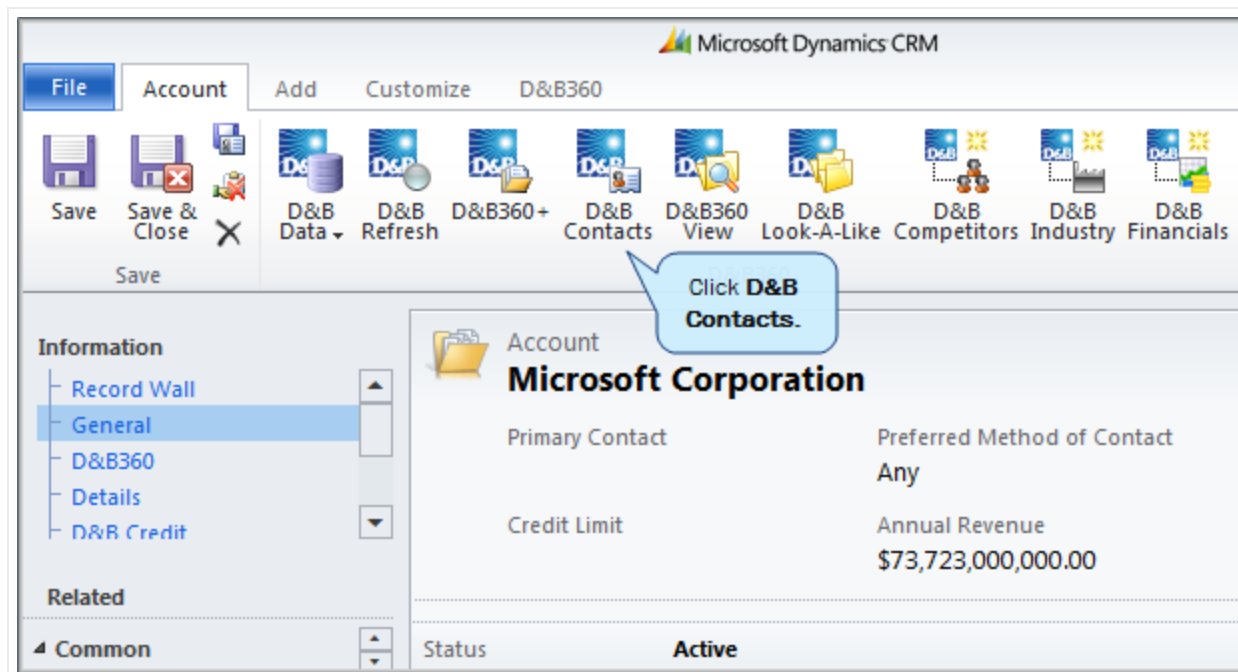


Note: A yellow status indicator displays when an account is being created. A green status indicator displays when the account is created.


Merging Contacts

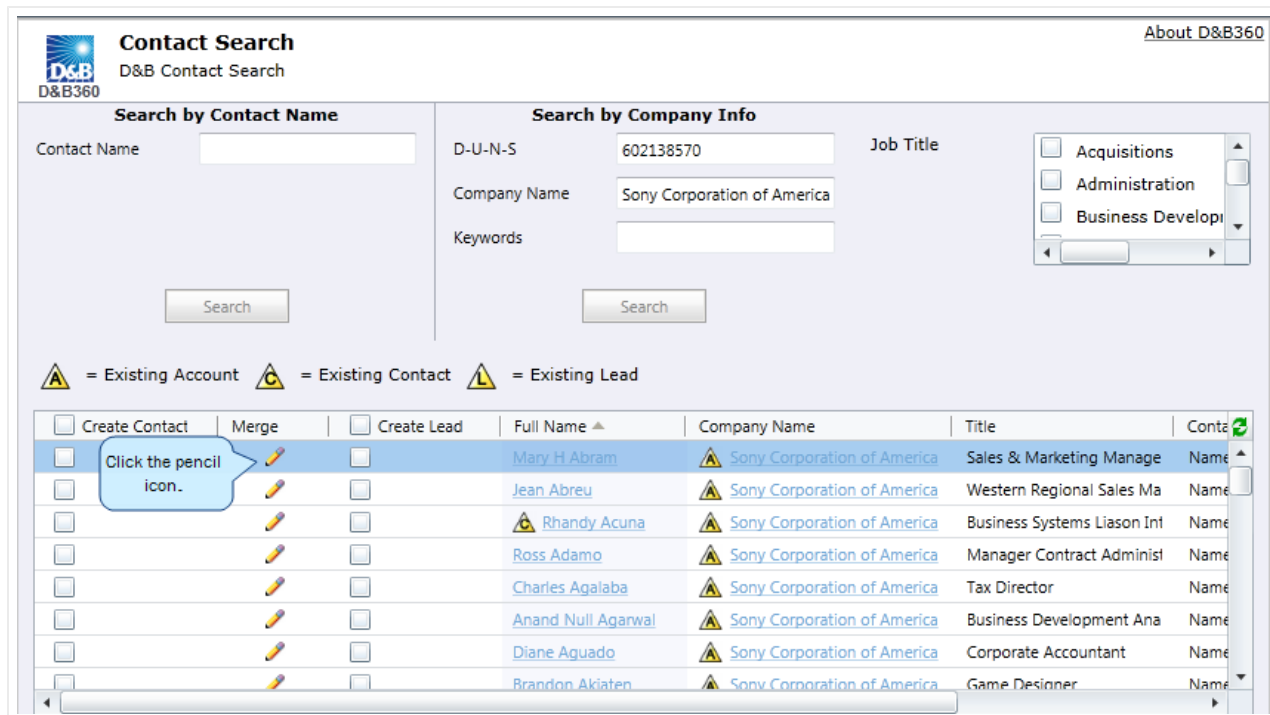
You can use the merge function when you have contact information in your CRM that did not come from D&B. In some cases, you might have more information because of the working relationship you have with this contact. However, in many cases the D&B information might be more current. To review information from both sources and determine what information you want to retain after the merge, use the merge duplicated contacts feature.

1. To display a list of your accounts, select **Customers -> Accounts**.
2. Click an account to select it. The **Account Detail** window for that account opens.
3. Click **D&B Contacts**.

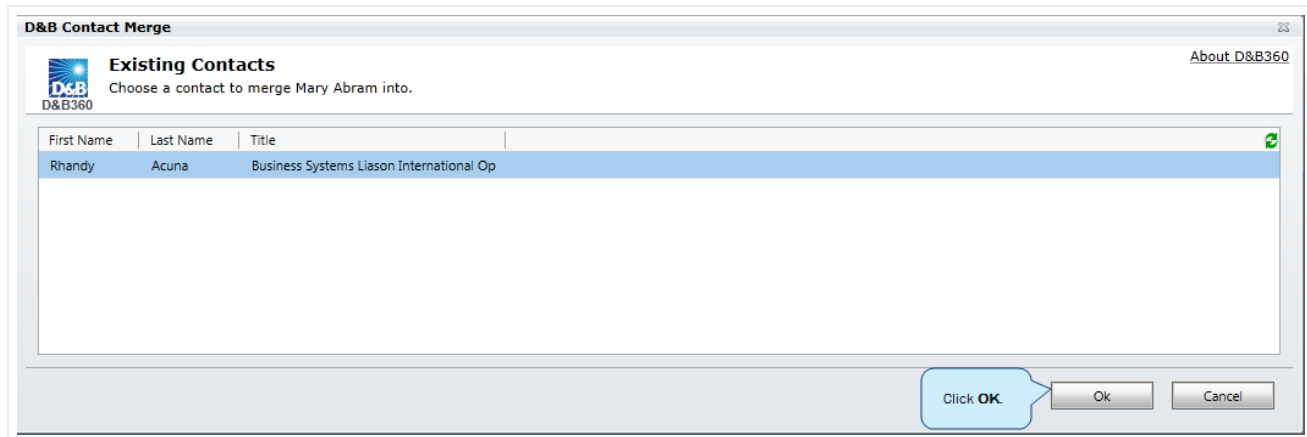


The results display in the **D&B Contact Search** window. The pencil icon displays for all contacts in the list and indicates another contact similar to it exists. Consider whether to merge these contacts.

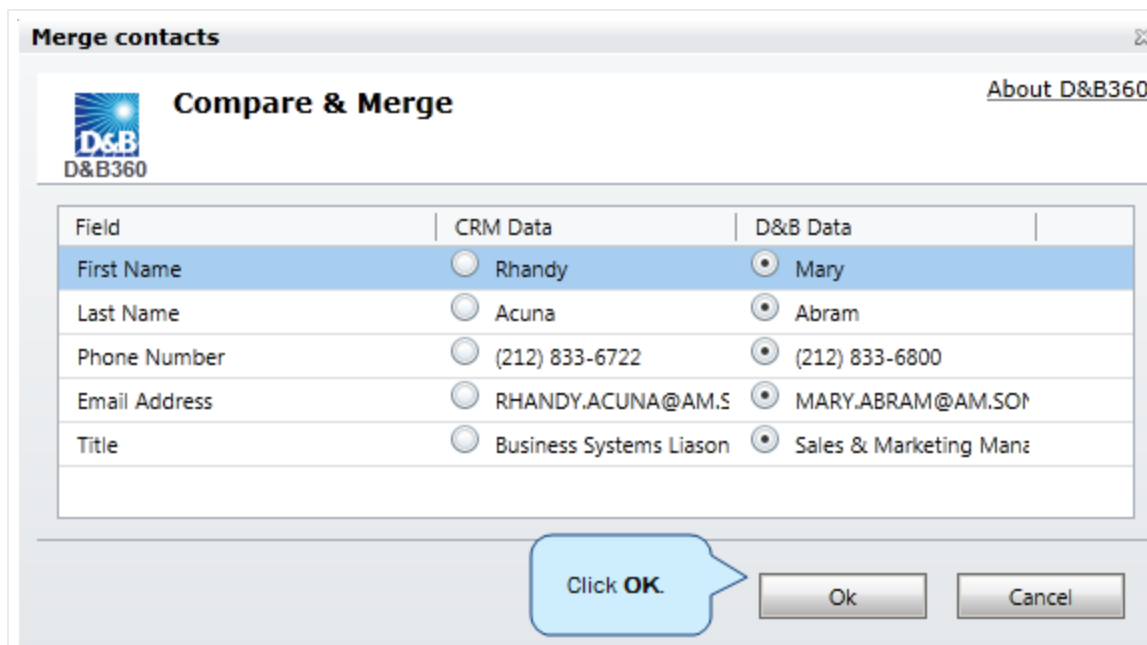
4. Next to the contact you want to merge, click the  pencil icon.



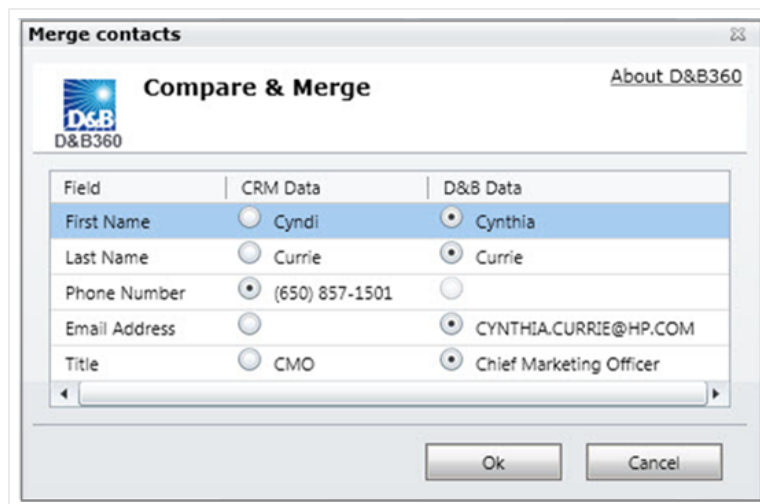
5. In the **D&B Contact Merge** window, **Existing Contacts** list, decide if this is the existing contact you want to pursue, then click **OK**.



6. In the **Compare and Merge** window, verify that the check marks display for any information you want to retain after the merge so that it is not lost.
7. Click **OK**.



In the following example, in the **Merge contacts** window, **Compare & Merge** list, we accept the First Name, Last Name, Email Address, and Title from the D&B data. Because the D&B Contact Data does not have a phone number, we selected the phone number in the CRM data. If we didn't select that phone number, the phone number we have would be overwritten with no data.

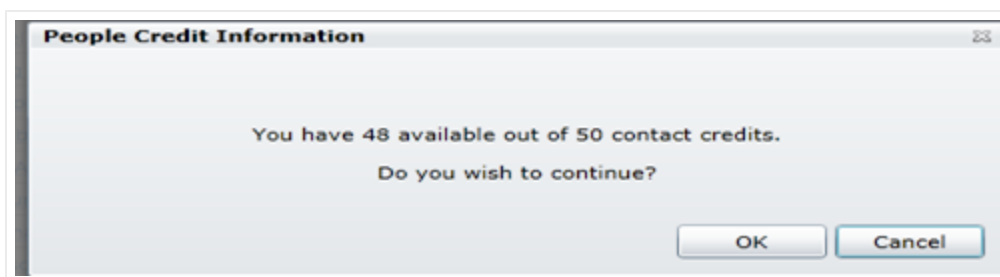


The screenshot shows the 'Merge contacts' window with the 'Compare & Merge' tab selected. The window displays a table comparing CRM Data and D&B Data for various fields. The 'First Name' field is highlighted in blue. The 'Phone Number' field shows a selection between CRM Data and D&B Data.

Field	CRM Data	D&B Data
First Name	<input type="radio"/> Cyndi	<input checked="" type="radio"/> Cynthia
Last Name	<input type="radio"/> Currie	<input checked="" type="radio"/> Currie
Phone Number	<input checked="" type="radio"/> (650) 857-1501	<input type="radio"/>
Email Address	<input type="radio"/>	<input checked="" type="radio"/> CYNTHIA.CURRIE@HP.COM
Title	<input type="radio"/> CMO	<input checked="" type="radio"/> Chief Marketing Officer

At the bottom of the window are 'Ok' and 'Cancel' buttons.

Note: When you click **Create** to create a new contact, the **People Credit Information** window opens to inform you of your current contact credits. To add the new contact, click **OK**. If you decide not to use your contact credit for that contact, click **Cancel**.



The screenshot shows the 'People Credit Information' window. It displays the message: 'You have 48 available out of 50 contact credits. Do you wish to continue?'. At the bottom right are 'OK' and 'Cancel' buttons.






6 Creating Leads with D&B360

With D&B360, you can leverage D&B data to enrich or add to your Lead information. In addition you can use information from public sources to verify or enrich your Lead information.

Leveraging ROW	6-2
Creating a D&B360 Lead from a Contact	6-2
Creating a Lead from an Account	6-4
Creating a D&B360 Lead Manually	6-6
Manually Creating a Person as a Lead	6-6
Manually Creating a Company as a Lead	6-8
Creating a D&B360 Lead Based on a List of Criteria	6-11
Creating a D&B360 Lead Based on Attributes of Specific Accounts	6-12
Creating a Lead from a Competitor	6-14

Note the following:

- ★ A gold star displays next to the first record and represents the Best Match found based on your search criteria. The more details you provide, the better the results.
-  A yellow triangle with the letter A indicates an existing account.
-  A yellow triangle with the letter C indicates an existing contact.
-  A yellow triangle with the letter L or O indicates an existing lead or opportunity.

Note: When you click or select the name of a company, a **Company Overview** window opens that displays details about that company including D-U-N-S number, name, location, address, a synopsis, and more.

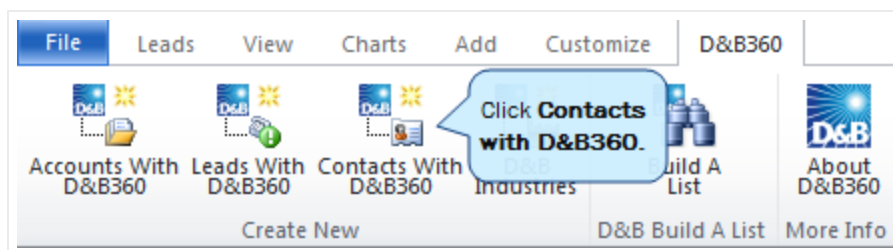
Leveraging ROW

You can use Rest of World (ROW) as an information source for news about a company and link to news stories directly from the windows where you are working. For more information, [see "Leveraging ROW" on page 6-2.](#)

Creating a D&B360 Lead from a Contact

If you have already established rapport with a contact, he or she would make a good lead for you. Or, a contact at a specific company might be a good lead for you.

1. In the **D&B360** tab, click **Contacts with D&B360**.



2. In the **Search by Contact Name** area, type the name of the contact for your search.
3. Click **Search**.



— or —

In the **Search by Company Info** area, **D-U-N-S**, **Company Name**, **Job Title**, or **Keywords** fields, type or select your search options.

4. Click **Search**.

Search by Company Info

D-U-N-S:

Company Name:

Keywords:

Job Title: ☐ CEO
☐ CEO/President (Division, Region)
☒ CFO
☐ Chairman

Click Search.

5. Next to the name of the contact in the **Create Lead** column, click to select the check box.
6. Click **Create**.

Contact Search About D&B360

D&B Contact Search

Search by Contact Name

Contact Name:

Search by Company Info

D-U-N-S:

Company Name:

Keywords:

Job Title: ☐ CEO/President (Division, Region)
☒ CFO
☐ Chairman

= Existing Account = Existing Contact = Existing Lead

<input type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Lead	Full Name	Company Name	Title	Contact Details
<input type="checkbox"/>		<input type="checkbox"/>	Christina Cutrouvo	WHOLE FOODS COMMUNITY CO-OP	Chief Financial Officer	Name & Title & Email
<input type="checkbox"/>		<input checked="" type="checkbox"/>	Glenda J. Flanagan	Whole Foods Market, Inc.	EVP and CFO	Name & Title & Email
<input type="checkbox"/>		<input type="checkbox"/>	Glenda J Flanagan	Whole Foods Market California, Inc	Cfo	Name & Title

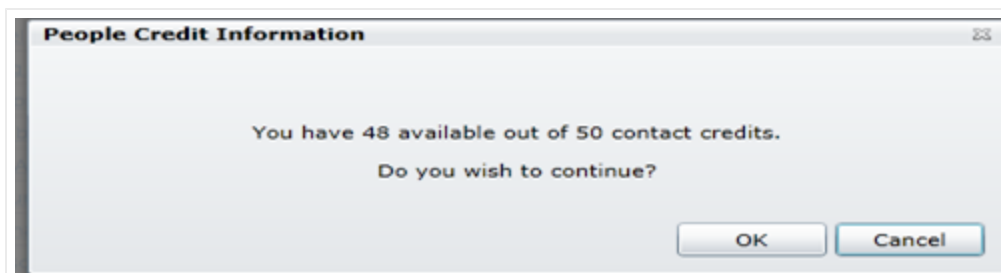
1 - 3 of 3 (1 selected)

Page 1 of 1

Click Create.

Note: If you want to create multiple leads or contacts, select more than one record from the list that displays in this window. When you click **Create**, leads or contacts are created for all of the records you selected.

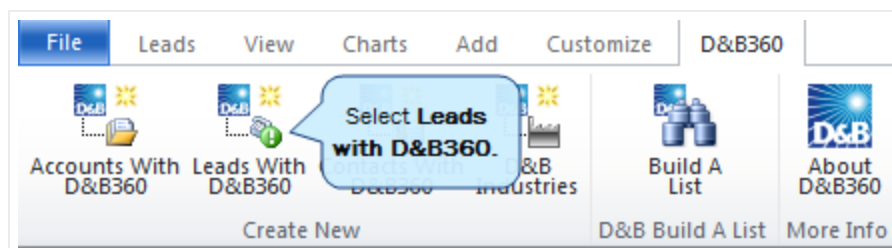
Note: When you click **Create** to create a new contact, the **People Credit Information** window opens to inform you of your current contact credits. To add the new contact, click **OK**. If you decide not to use your contact credit for that contact, click **Cancel**.



The yellow letter A triangle displays only with Leads and indicates that an account already exists for the company referenced in the lead. Before you add a person as a lead, you can see if that person is already a lead for an account.

Creating a Lead from an Account

1. From the **D&B360** menu, select **Leads With D&B360**.



2. In the **Search by Company Info** area, **Company Name**, **Country**, and **State/Province**, fields, type or select your search criteria. These fields are required.
3. Enter any other information you have about the existing account in the **City**, **Address**, **Postal Code**, and **Phone** fields.
4. Click **Search**.

Create Lead
D&B People or Company Search

[About D&B360](#)

Search by Contact Name

Contact Name

Search by Company Info

Company Name * Country *

City State/Province *

Address Postal Code

Phone

Click **Search.**

5. In the **D&B Company Results** list, to associate your search for leads to a specific company, highlight the appropriate row and click **Select**.

Create Lead
D&B People or Company Search

[About D&B360](#)

Search by Contact Name

Contact Name

Search by Company Info

Company Name * Country *

City State/Province *

Address Postal Code

Phone

Displaying D&B Company Results

⚠ = Existing Account ⚠ = Existing Contact ⚠ = Existing Lead

Match Info	Company	Address	City	State/Province	Country	Postal Code	Phone
*****6107	★ ⚠ STARBUCKS CORPORATION	2401 UTAH AVE S	SEATTLE	WA	US	98134-1436	(206) 44
*****3264	STARBUCKS CORPORATION	2401 UTAH AVE S	SEATTLE	WA	US	98134-1436	(503) 73

1 - 2 of 2

Page 1 of 1

Click **Select**

Note: If you want to create multiple leads or contacts, select more than one record from the list that displays in this window. When you click **Create**, leads or contacts are created for all of the records you selected.

6. In the **Create Lead** window, select the lead you want to add, and then click **Create**.

Create Lead
D&B People Search

Search by Contact Name
Contact Name:
Search

Search by Company Info
D-U-N-S: 155366107
Company Name: STARBUCKS CORPORATION
Keywords:
Search

Job Title:
☐ Treasurer
☐ Vice Chairman
☒ Vice President

⚠ = Existing Account ⚠ = Existing Contact ⚠ = Existing Lead

Company exists as a lead or account.

Full Name	Company Name	Title	Contact Details
Corey duBrowa	Starbucks Corporation	VP Global Communications	Name & Title & Email
Sophie Hager Hume	Starbucks Corporation	VP, Assistant General Coun:	Name & Title & Email
Ben Packard	Starbucks Corporation	VP Corporate Social Respor	Name & Title
Douglas Satzman	Starbucks Corporation	Vice President Business Dev	Name & Title & Email

1 - 4 of 4 (0 selected)

Return to Company Search **Create**

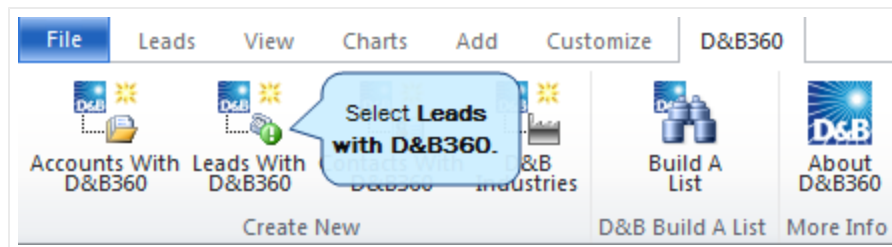
The new lead is added to your D&B360 Leads.

Creating a D&B360 Lead Manually

When you run a D&B People search to create a lead, you can manually complete the process of establishing a lead. You can also manually create a company as a lead.

Manually Creating a Person as a Lead

1. From the **D&B360** menu, select **Leads With D&B360**.



2. In the **Create Lead** window, **Search by Contact Name** area, type the name of the person you want to create as a lead, then click **Create**.

Create Lead
D&B People or Company Search

Search by Contact Name
Contact Name: Glenda Fianagan
Search

Search by Company Info
Company Name *:
City:
Address:
Phone:
Country *: United State
State/Province *:
Postal Code:
Search

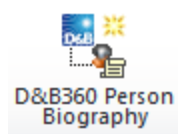
Displaying D&B People Results
 ⚠️ = Existing Account ⚠️C = Existing Contact ⚠️L = Existing Lead

Full Name ▲	Company Name	Title	Contact Details
Glenda J Fianagan	Whole Foods Market California, Inc	Cfo	Name & Title
Glenda Jane Jane Flana	FRESH & WILD HOLDINGS LTD	Director	Name & Title

1 - 9 of 9 (0 selected) Page 1 of 1

Create

The **Lead** window for this lead displays information about your new lead.



In the D&B Lead and Contact windows, you can click D&B360 Person Biography to display information about a contact or lead. Or, when you click the name of a contact or lead, the D&B360 Person Biography window opens and displays information about that contact or lead. This includes the person's age, current employment, position in the company, business services sector, and the company address and telephone number.

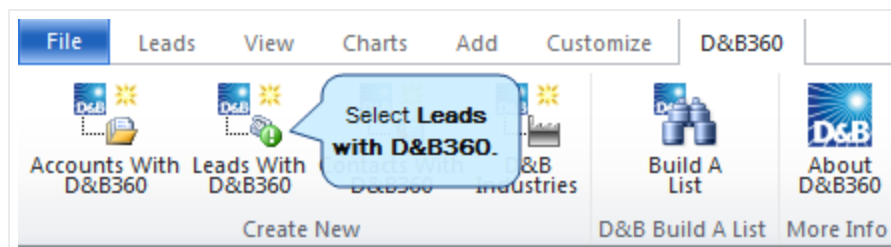
The screenshot shows the Microsoft Dynamics CRM interface. The top ribbon includes tabs for File, Lead, Add, Customize, and D&B360. The D&B360 tab is active, showing various icons for D&B Data, D&B Refresh, D&B360+, D&B Competitors, D&B Industry, D&B Financials, and D&B360 Person Biography. The main window displays the 'Lead' record for 'Glenda Flanagan'. The 'Lead Source' is 'D&B360', the 'Rating' is 'Warm', and the 'Owner' is 'Kelly Todd'. The 'Record Wall' section is visible, and the 'General' tab is selected, showing fields for Topic, Salutation, First Name, Last Name, Job Title, Company Name, Business Phone, Home Phone, Mobile Phone, Fax, and Other Phone.



In the D&B Lead and Contact windows, you can click D&B360 Person Biography to display information about a contact or lead. Or, when you click the name of a contact or lead, the D&B360 Person Biography window opens and displays information about that contact or lead. This includes the person's age, current employment, position in the company, business services sector, and the company address and telephone number.

Manually Creating a Company as a Lead

1. From the **D&B360** menu, select **Leads With D&B360**.



2. In the **Create Lead** window, **Search by Company Info** area, type the name of the company you want to create as a lead.
3. Select the **Country** and State/Province.
4. Type in any other information for your search such as **Address**, **Postal Code**, and **Phone**.
5. Click **Search**.

Create Lead
D&B People or Company Search

Search by Contact Name

Contact Name

Search by Company Info

Company Name *

City

Address

Phone

Country *

State/Province *

Postal Code

Click Search.

6. In the list that displays, select the row of the company you want to create as a lead, and then click **Select**.

Displaying D&B Company Results

⚠ = Existing Account ⚠ = Existing Contact ⚠ = Existing Lead

Match Info	Company	Address	City	State/Province	Country	Postal Code	Phone
****5195	★ ⚠ ⚠ DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(51)
****5955	⚠ DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	
****1781	⚠ DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	
****7503	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(51)
****9549	DELL INC.	501 DELL CENTER BLVD BLDG 2	ROUND ROCK	TX	US	78664-7306	(51)
****4215	DELL INC.	8200 N ALLEN RD	ROUND ROCK	TX	US	78682-0001	(30)
****0543	DELL INC.	2300 GREENLAWN BLVD	ROUND ROCK	TX	US	78664-7090	(51)
****6210	DELL U S A CORPORATION	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(51)
****8834	DELL GEN. P. CORP.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(51)
****9994	DELL INTERNATIONAL INCORPORATED	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(51)
****4913	DELL MARKETING CORPORATION	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(51)
****6518	DELL MARKETING L.P.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(51)
****0550	DELL MARKETING USA LP LLC	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(51)
****0652	DELL COLUMBIA INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(51)
****9417	DELL CORPORATION	8200 N MO PAC EXPY STE 185	AUSTIN	TX	US	78759-8866	(51)
****5917	DELL	805 CASHEW LN	CEDAR PARK	TX	US	78613-3209	(50)
****3487	DELL USA L.P.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(51)

1 - 22 of 22

Page 1 of 1

Click Select.

Note: If you want to create multiple leads or contacts, select more than one record from the list that displays in this window. When you click **Create**, leads or contacts are created for all of the records you selected.

7. In the **Create Lead** window, select the company, and then click **Create <company name> as a lead**. The name of the company pre-populates this link; in this example, it is Dell USA Corporation.

— or —

To create one of the people in the **Full Name** list as a lead, click **Create** in the bottom right of the window.

Create Lead About D&B360

D&B People Search

Search by Contact Name

Contact Name

Search by Company Info

D-U-N-S Job Title

Company Name

Keywords

☐ Acquisitions
☐ Administration
☐ Business Developm

= Existing Account
 = Existing Contact
 = Existing Lead

Create [DELL U S A CORPORATION](#) as a lead

Click **Create <company name> as a lead.**

Full Name ▲	Company Name	Title	Contact Details
Amita Agarwal	Dell U S A Corporation	Senior Program Manager	Name & Title & Email
Mohammed Amor	Dell U S A Corporation	Engineer	Name & Title
Raveendra Avutu	Dell U S A Corporation	It Mgr	Name & Title & Email
Clint Barrett	Dell U S A Corporation	Developer	Name & Title & Email
Thomas Barta	Dell U S A Corporation	Database Administrator	Name & Title & Email
John Beckett	Dell U S A Corporation	Eng	Name & Title & Email
Mark Belcher	Dell U S A Corporation	Lab Manager	Name & Title

1 - 50 of 66 (0 selected)

OR: To create this person as a lead, click **Create.**

In the **Create Lead** window that opens, click **OK**.

Create Lead About D&B360

D&B360 Create Lead

Last Name *

Title

Email Address

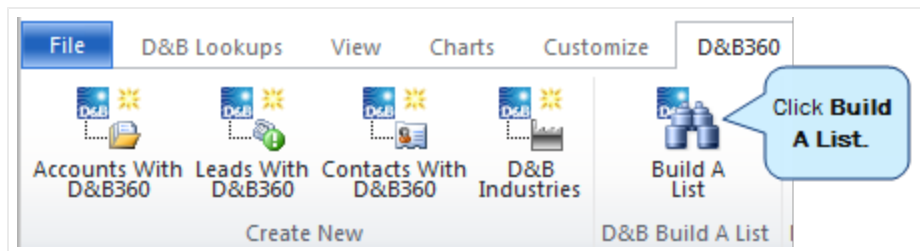
First Name

Phone Number

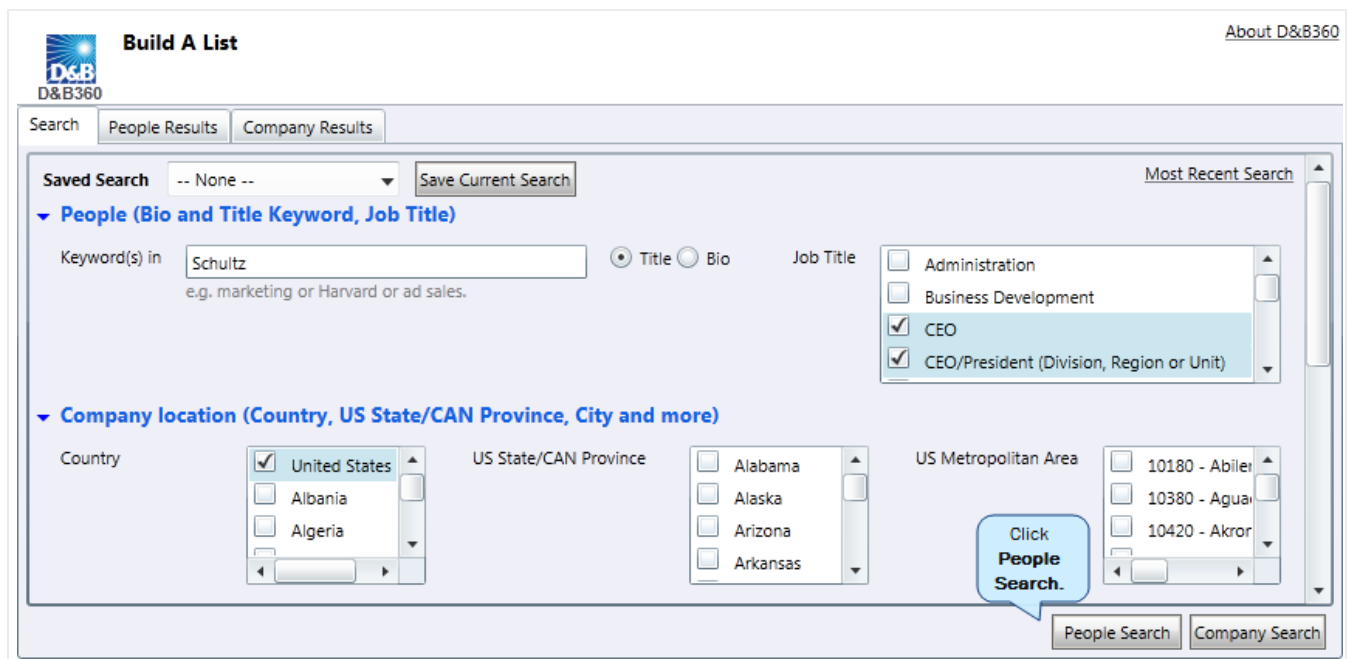
Click **OK**

Creating a D&B360 Lead Based on a List of Criteria

1. From the **D&B360** menu, select **D&B360 Build A List**.



2. In the **Build A List** window, **People** section, enter your search criteria.
3. In any of the **Company** sections, enter search criteria.
4. To display a list of candidates, click **People Search**.



5. In the **Create Lead** column next to the candidate you want to create as a new lead, select the check box, then click **Create**.

Build A List [About D&B360](#)

Search People Results Company Results

Saved Search Save Current Search

⚠ = Existing Account ⚠ = Existing Contact ⚠ = Existing Lead

<input type="checkbox"/> Create Contact	<input type="checkbox"/> Create Lead	Full Name ▲	Company Name	Title	Contact Details
<input type="checkbox"/>	<input type="checkbox"/>	Chris Centeno	Christopher J Centeno MD	Md; Medical Director The C	Name & Title & Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jill K Schultz	Jill K Schultz	Partner Burns And Schultz L	Name & Title

1 - 2 of 2 (1 selected)

Page 1 of 1

Click **Create.** **Create**

Note: If you want to create multiple leads or contacts, select more than one record from the list that displays in this window. When you click **Create**, leads or contacts are created for all of the records you selected.

The new D&B360 lead is created.

Build A List [About D&B360](#)

Search People Results Company Results

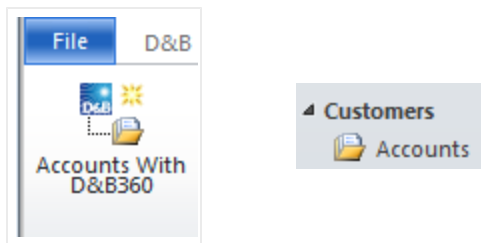
0 Contacts and 1 Leads were created

Create Contact	Create Lead	Name	Status
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jill K Schultz	

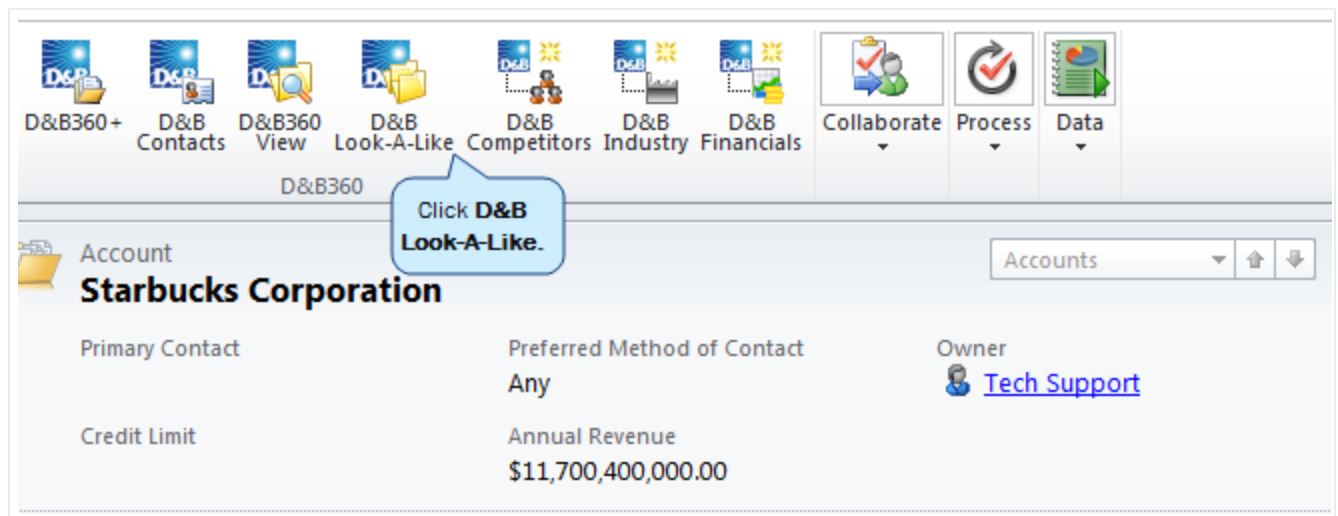
Back to Results

Creating a D&B360 Lead Based on Attributes of Specific Accounts

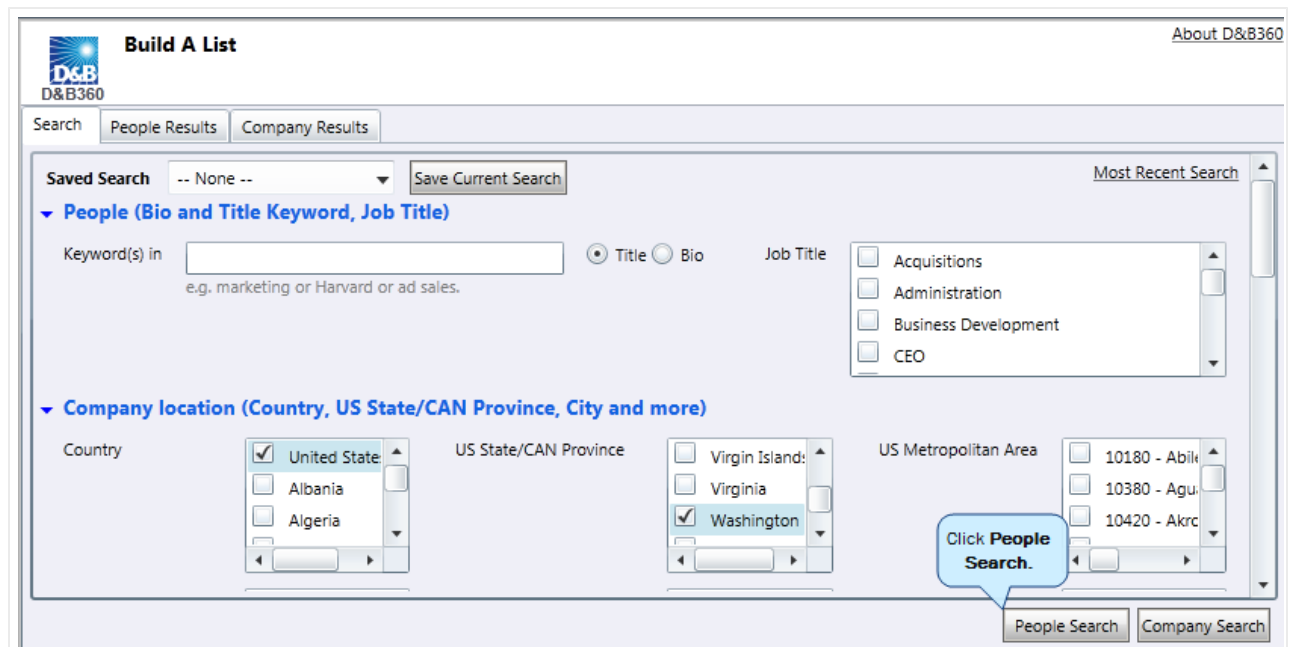
1. In the **D&B360** menu, select **Accounts with D&B360**, or on the left menu, select **Customers -> Accounts**.



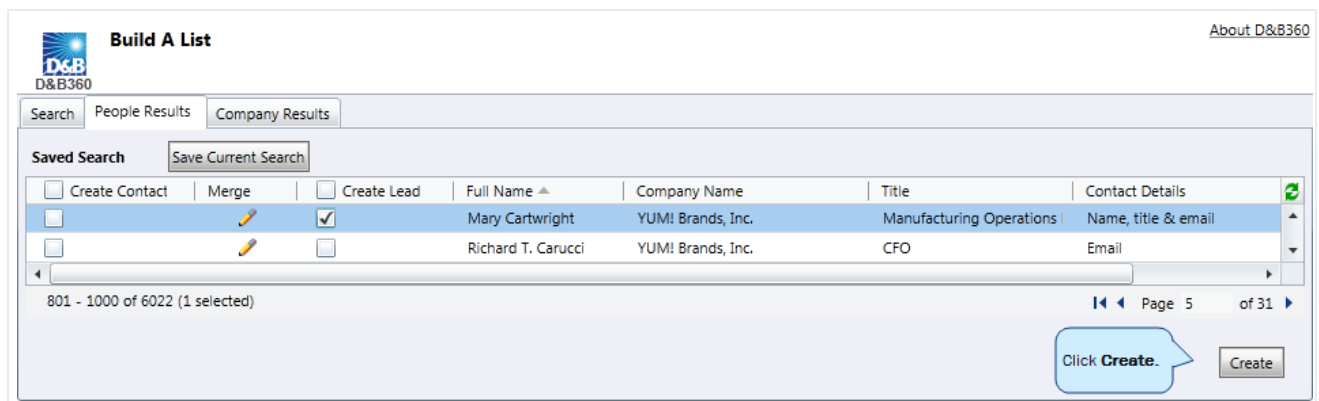
2. In the list of your **D&B360** accounts, click an account to select it.
3. In the **Account** window, click **D&B Look-A-Like**.



4. In the **Build A List** window, click **People Search**.

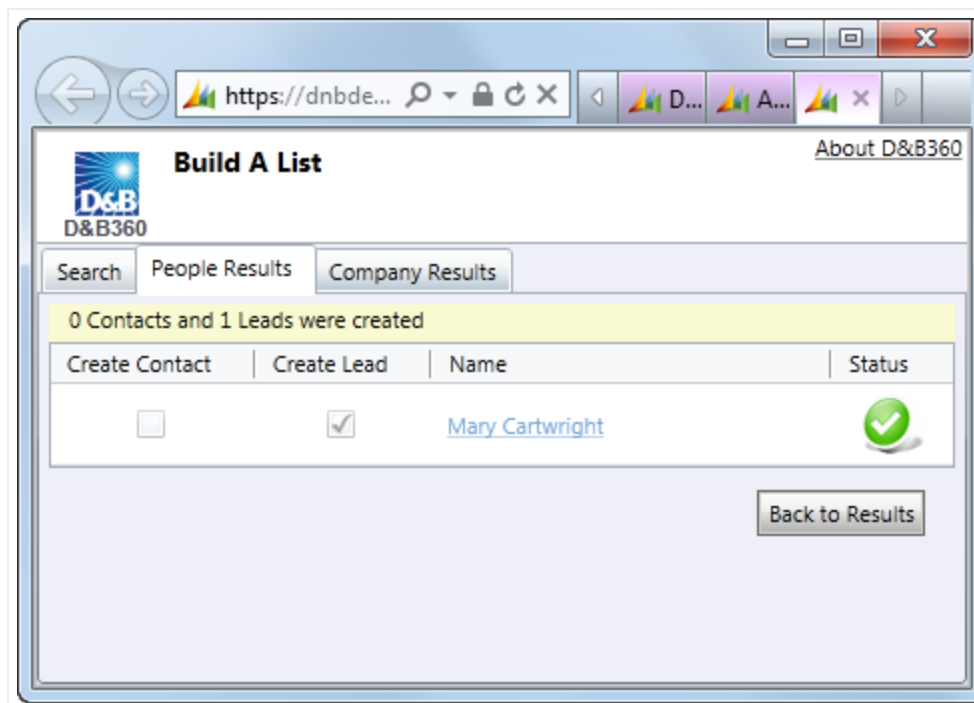


5. In the **Create Lead** column, click the check box next to the contact name you want to add, then click **Create**.



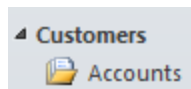
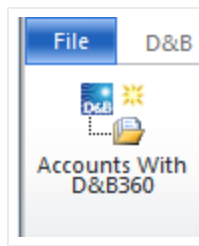
Note: If you want to create multiple leads or contacts, select more than one record from the list that displays in this window. When you click **Create**, leads or contacts are created for all of the records you selected.


The new D&B360 lead is created.



Creating a Lead from a Competitor

1. From the **D&B360** menu, select **Accounts with D&B360**, or from the left menu, select **Customers -> Accounts**.
















2. In the **Account** window, click **D&B Competitors**.
3. In the **Competitors List** window, next to the name of the person whose company you want to use as your search criteria, click the  person icon.

Competitors List About D&B

Competitors for Starbucks Corporation

Matching Companies: 18

<input type="checkbox"/> Create Account		D-U-N-S	Company	City	State/Province	Country	Annual Sales	Is Top Competitor
<input type="checkbox"/>		*****1258	Tim Hortons Inc.	Oakville	ON	Canada	\$2,797.05	
<input type="checkbox"/>		*****6375	illycaffè S.p.A.	Trieste		Italy	\$379.34	
<input type="checkbox"/>		*****4913	Luigi Lavazza S.p.A.	Turin		Italy	\$1,304.31	
<input type="checkbox"/>		*****8874	Nestlé S.A.	Vevey	Vaud	Switzerland	\$116,623.51	
<input type="checkbox"/>		*****7822	Caffè Nero Group Ltd.	London		United Kingdom	\$272.75	
<input type="checkbox"/>		*****9355	Whitbread PLC	Dunstable	Bedfordshire	United Kingdom	\$2,817.77	
<input type="checkbox"/>		*****3042	Greggs plc	Newcastle		United Kingdom	\$1,024.49	
<input type="checkbox"/>		*****9128	Dunkin' Brands Group, Inc.	Canton	MA	United States	\$628.20	
<input type="checkbox"/>		*****7320	International Coffee & Tea, LLC	Los Angeles	CA	United States	\$198.10	
<input type="checkbox"/>		*****2456	Caribou Coffee Company, Inc.	Minneapolis	MN	United States	\$326.50	
<input type="checkbox"/>		*****7496	Cinnabon, Inc.	Atlanta	GA	United States	\$17.50	

Note: If you want to create multiple leads or contacts, select more than one record from the list that displays in this window. When you click **Create**, leads or contacts are created for all of the records you selected.

4. In the **Create Contact** window, next to the person you want to add as a lead, click to select the check box, then click **Create**.

If contact not found, [create lead manually](#)

<input type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Lead	Full Name ▲	Company Name	Title	Contact Details	
<input type="checkbox"/>		<input type="checkbox"/>	Brian Alliffi	Caribou Coffee Company, Inc.	Green Coffee Sourcing Sup	Name & title	
<input type="checkbox"/>		<input type="checkbox"/>	Pam Asplund	Caribou Coffee Company, Inc.	Payroll Manager	Name & title	
<input type="checkbox"/>		<input type="checkbox"/>	Renee Auseth	Caribou Coffee Company, Inc.	Compensation Manager; Hi	Name, title & email	
<input type="checkbox"/>		<input type="checkbox"/>	Peggy Bartholomew	Caribou Coffee Company, Inc.	Warehouse And Logistics Iv	Email	
<input type="checkbox"/>		<input type="checkbox"/>	Laura Brunke	Caribou Coffee Company, Inc.	Marketing Assistant	Name & title	
<input type="checkbox"/>		<input checked="" type="checkbox"/>	Kip R. Caffey	Caribou Coffee Company, Inc.	Director	Name & title	
<input type="checkbox"/>		<input type="checkbox"/>	Sarah Palisi Chapin	Caribou Coffee Company, Inc.	Director	Name & title	

1 - 79 of 79 (1 selected)

Page 1 of 1

Click **Create.**

The **Create Contact** window confirms that the new lead was created.

Create Contact About D&B36

D&B People Search

Search by Contact Name

Contact Name

Search by Company Info

D-U-N-S Job Title

Company Name

Keywords

Acq ☐

Adr ☐

Bus ☐

0 Contacts and 1 Leads were created




Create Contact	Create Lead	Name	Status
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Kip R. Caffey	

7 Using Build a List

You can use Build a List to specify the criteria that you want to apply to your searches, which help you identify contacts, leads/competitors, new accounts, or information to help you enrich your existing accounts.

General Search Process	7-1
Specific Criteria Collected	7-2
Saving Searches	7-3
Using a Saved Search	7-5

Note the following:

- ★ A gold star displays next to the first record and represents the Best Match found based on your search criteria. The more details you provide, the better the results.
-  A yellow triangle with the letter A indicates an existing account.
-  A yellow triangle with the letter C indicates an existing contact.
-  A yellow triangle with the letter L or O indicates an existing lead or opportunity.

Note: To export Company Results to an Excel or other spreadsheet program on your local directory, click the spreadsheet icon.

General Search Process

Step	Description
Click Build A List	Decide if you are searching for people, such as contacts, or for companies.
Determine the type of search.	

Enter the search criteria.	Enter the search criteria you want to use. Best Practice: The more data you enter, the more focused your results
Click the appropriate button	<ul style="list-style-type: none"> If you're searching for people, click People Search. If you're searching for companies, click Company Search.

After you execute your search, you save your search and use it later.

For more information about criteria to use for your searches, see the following table.

Specific Criteria Collected

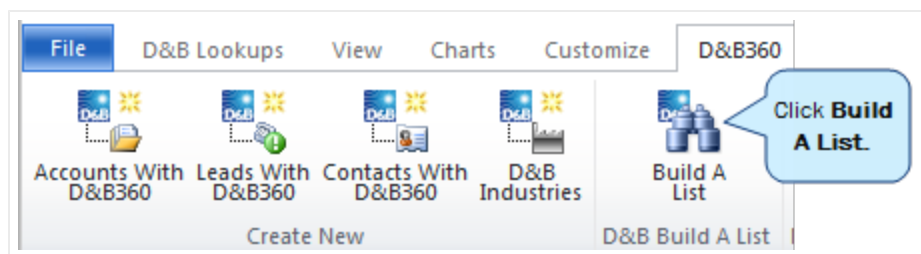
Criteria Categories	Specified Information	
PEOPLE SEARCHES		
People	Bio and Title Keyword	Job Title
COMPANY SEARCHES		
Company location	Country (select from list)	US State or CAN Province (select from list)
	US Metropolitan Area	Global State or Province
	City	Zip or Postal Code
	US or CAN Area Code	Area around US Zip Code (# of Miles)
Company size	Annual Sales Growth — \$ mil (From/To)	Total Employees (From/To)
	Market Cap - \$mil (From/To)	
— More size criteria	Annual Sales Growth — % (From/To)	Total Employee Growth — % (From/To)
	Employees At This Location (From/To)	
Industry	Industry Type (Primary Only — or — Primary and Secondary)	
	US SIC Code (type code)	US SIC Code (select from list)
	NAICS Code (type code)	NAICS Code (select from list)

Company type	Public or Private (select from list)	Location Type (select Branch, Headquarters, or Single Location)
	Subsidiary Status (select from list)	Marketing Pre-screen (Select High, Medium, or Low)
FINANCIAL DATA		
— Key numbers	Assets — \$ mil (From/To)	R&D Expense — \$ mil (From/To)
	Ad Expenses — \$ mil (From/To)	Net Income — \$ mil (From/To)
	Net Income — % (From/To)	Fiscal Year End (select from list)
— US IPO data	Filing Date — MM/DD/YYYY (From/To)	Trading Date — MM/DD/YYYY (From/To)
	Offer Amount — \$ mil (From/To)	Price Range — \$ (From/To)
Special criteria	Company keyword (type text)	D-U-N-S Number (type text)
	UK Registration Number (type number)	UK VAT Number (type text)
	Year of Founding or Change in Control — YYYY (From/To)	

Note: For some categories you can select more than one choice. For data fields such as US SIC Codes (type code), use a comma to separate multiple choices.

Saving Searches

1. From the **D&B360** menu, select **D&B360 Build A List**.



2. In the **Build A List** window, **People** section, enter your search criteria.
— or —
3. In any of the **Company** sections, enter your search criteria.
4. To display a list of candidates, click **People Search**.

5. In the **Build A List** window, click **Save Your Search** to save this search.

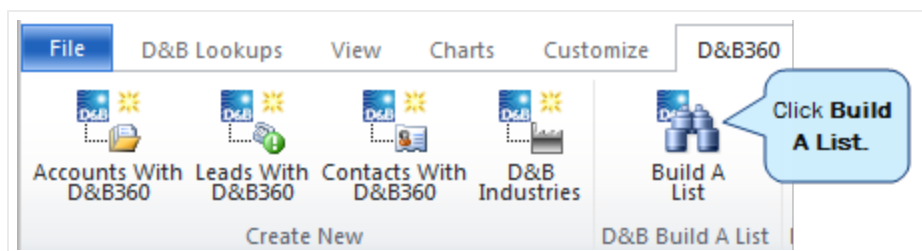
<input type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Lead	Full Name ▲	Company Name	Title
<input type="checkbox"/>		<input type="checkbox"/>	Mary Cartwright	YUM! Brands, Inc.	Manufacturing Operations
<input type="checkbox"/>		<input type="checkbox"/>	Richard T. Carucci	YUM! Brands, Inc.	CFO

6. In the **Saved Search** field, type a name for your search, and then click **Save Search**.

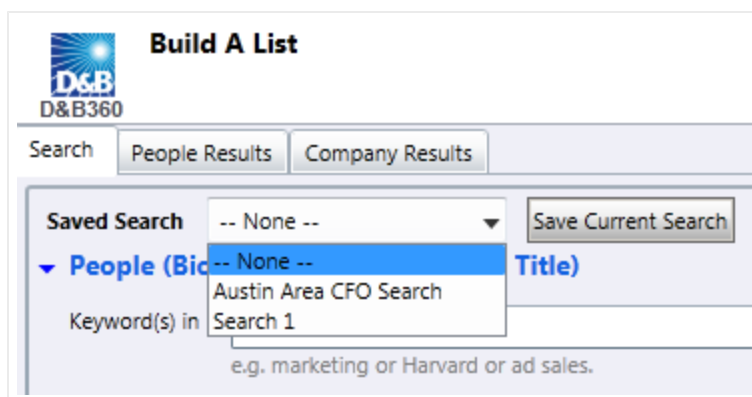
Your search is now saved, and you can use it again at a later time. If you log off and want to go back and save your search, you can log back in, execute the search, and then save it. Your last search is preserved until you change it.

Using a Saved Search

1. In the **D&B360** menu, select **D&B360 Build A List**.



2. In the **Saved Search** field, use the menu to select a search that you have saved.



3. Click to select your saved search. The search criteria changes.
4. In the **Build A List** window that opens to your saved search, click the **People Search** or **Company Search**.



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