



D&B360

User Guide

for Oracle CRM

Version 2.2

D&B360 is a trademark or registered trademark of Dun and Bradstreet, Incorporated. Other trademarks used herein are the trademarks or registered trademarks of their respective owners.

This document is a work of authorship that belongs to Dun and Bradstreet, Incorporated and is protected by United States and foreign copyright laws and international copyright treaties. The use of the software and this Documentation is governed by the Dun and Bradstreet Incorporated software license agreement.

©Dun & Bradstreet, Inc. 2013-2014. All rights reserved.



Contents

About this Guide	6
Audience and Purpose	6
Conventions	6
Navigating in the PDF	6
Related Documentation	7
1 Introduction to D&B360	1-1
Product Benefits	1-1
Guide Objectives	1-2
Guide Organization	1-2
D&B360 Packages	1-2
Paid Subscriptions	1-3
Trial Subscriptions	1-3
Credit Consumption Rules	1-4
2 Getting Started with D&B360	2-1
About D&B360	2-1
Accessing the D&B360 Window	2-1
Using D&B360 Rest of World	2-2
Setting Alerts	2-2
Managing Alerts and Triggers	2-3
Identifying D&B360 Standard Options and Icons	2-5

D&B Standard Options	2-5
D&B Standard Icons	2-6
3 Creating a New Account in D&B360	3-1
Creating a New Account Using Name and Address	3-2
Creating a D&B360 Account Based on a List of Criteria	3-4
Criteria Categories	3-4
Creating a D&B360 Account Based on Attributes of a Specific Account	3-5
Creating a D&B360 Account from Records Related to Existing Accounts	3-7
Reviewing Results when Searching by Family Tree Hierarchy	3-8
Creating a D&B360 Account from Competitors	3-9
4 Enriching Accounts with D&B360	4-1
Leveraging ROW	4-2
Adding D&B Data to an Existing Account	4-2
Identifying Related Accounts in D&B360	4-4
Displaying and Adding Industry Information about Existing Accounts	4-5
Displaying Industry Information	4-5
Adding an Industry to an Existing Account	4-6
Leveraging Industry Information	4-7
Adding Financial Information to Existing Accounts	4-9
5 Adding Contacts with D&B360	5-1
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	5-6
Merging Duplicated Contacts	5-7
6 Creating Leads with D&B360	6-1
Leveraging ROW	6-1
Creating a D&B360 Lead from a Contact	6-1
Creating a Lead from an Existing Account	6-2
Creating a D&B360 Lead Manually	6-3
Creating a D&B360 Lead Based on a List of Criteria	6-4
Creating a D&B360 Lead Based on Attributes of Specific Accounts	6-5
Creating a D&B360 Lead from a Competitor	6-6
7 Using Build a List	7-1
General Search Process	7-1
Specific Criteria Collected	7-2
Saving Searches	7-3
Using a Saved Search	7-4
Index	I



About this Guide

Audience and Purpose

This guide is for D&B360 Oracle CRM 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 Oracle CRM, refer to the CRM documentation.



1 Introduction to D&B360

Welcome to the *D&B360 Administration and Installation Guide for Oracle 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 Oracle CRM.

Product Benefits	1-1
Guide Objectives	1-2
Guide Organization	1-2
D&B360 Packages	1-2
Paid Subscriptions	1-3
Trial Subscriptions	1-3
Credit Consumption Rules	1-4

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.

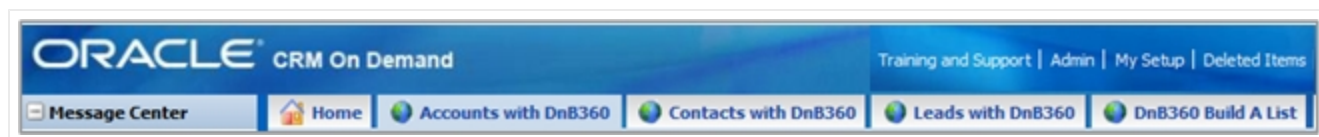
See New Opportunities	Seeing your customers and prospects in a new way can uncover new information and new-sale entry points.
Accelerate Your Sales Cycle	Once you establish relevance and credibility, customers will trust you with their business.
Expand Your Customer Footprint	Build customer relationships 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 Oracle 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 Oracle CRM, new tabs will display and provide access to new features and functions.



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.

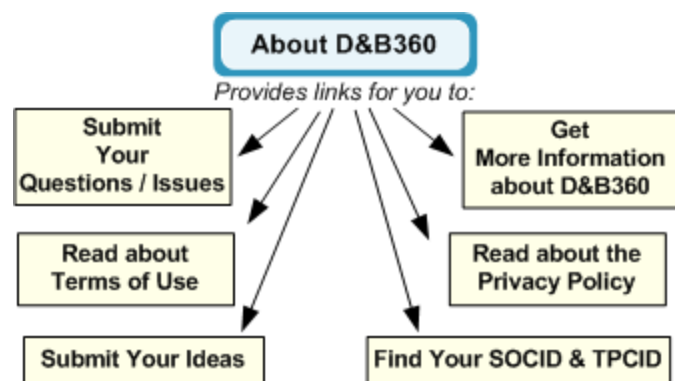
Type of Tracking	Description
Person Credit	<p>The contact credit limit represents the combined number of premium and non-premium D&B people that customers can import.</p> <p>For example, a user with a trial credit limit of 25 could import:</p> <ul style="list-style-type: none">• 20 premium and 5 non-premium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

About D&B360	2-1
Accessing the D&B360 Window	2-1
Using D&B360 Rest of World	2-2
Identifying D&B360 Standard Options and Icons	2-5
D&B Standard Options	2-5
D&B Standard Icons	2-6

About D&B360

Click **About D&B360**, located on the ribbon as well as on the top right side of most D&B360 windows, to find basic information and useful links for interacting with D&B360.

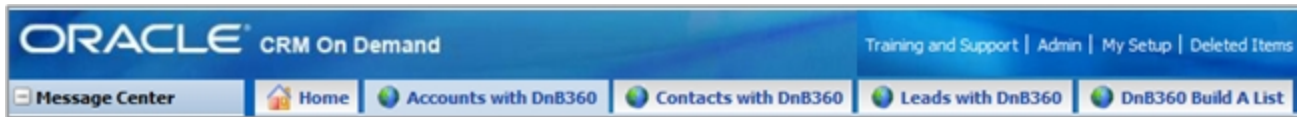


Accessing the D&B360 Window

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

- Log in to the Oracle CRM – using your user name and password.

Note: These additional D&B360 tabs now display within your ORACLE CRM instance: Accounts with D&B360, Contacts with D&B360, Leads with D&B360, and D&B360 Build A List.



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.

D&B360 Rest of World

Latest News Alerts

Interview: Deepak Giridharagopal on Puppet, Immutable, and Analyzing 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

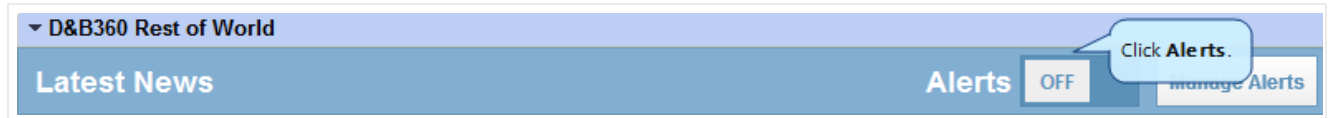
Greg Davis MOVED to Vice President of Software and Peripherals 18-Nov-2013

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

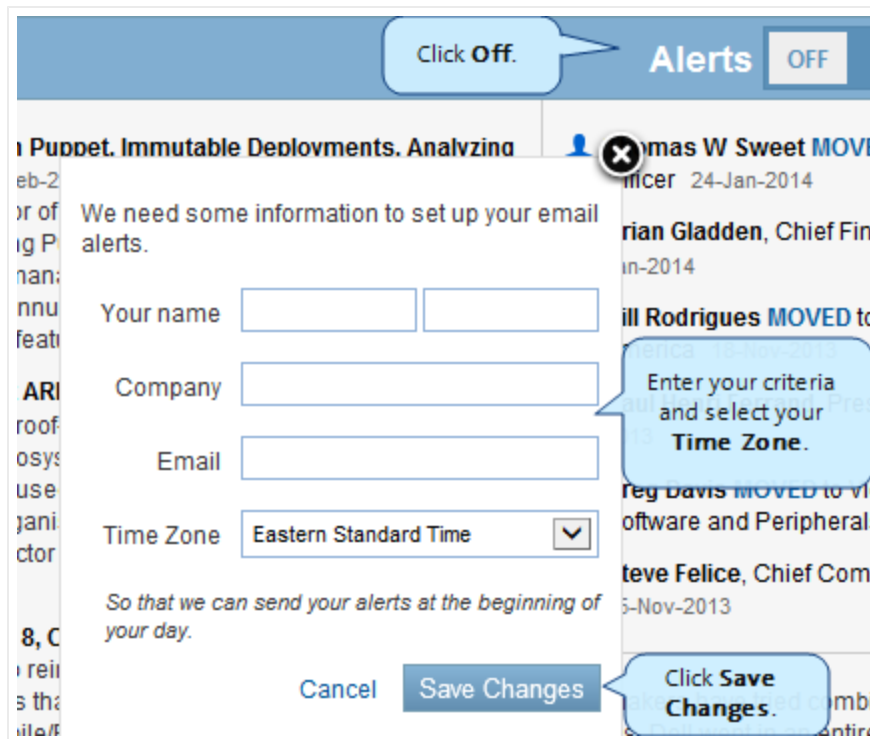
Setting Alerts

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:

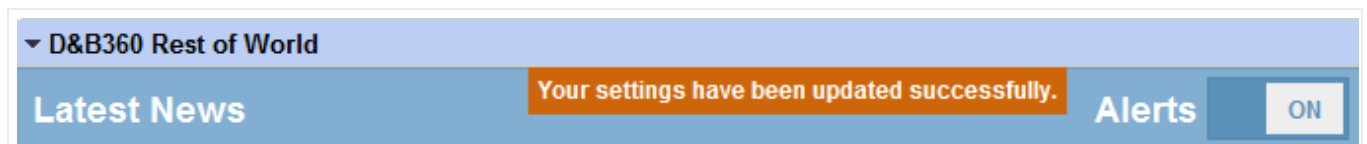
1. On a D&B360 Account page, click **D&B360 Rest of World**.
2. On the **D&B360 Rest of World** area, click **Alerts** to set up your email alerts.



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**.

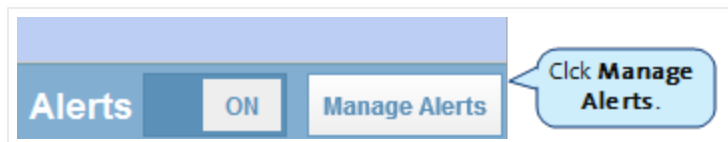


A message displays that your settings were updated, and the **Alerts** button changes to **ON**.



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**.

- 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

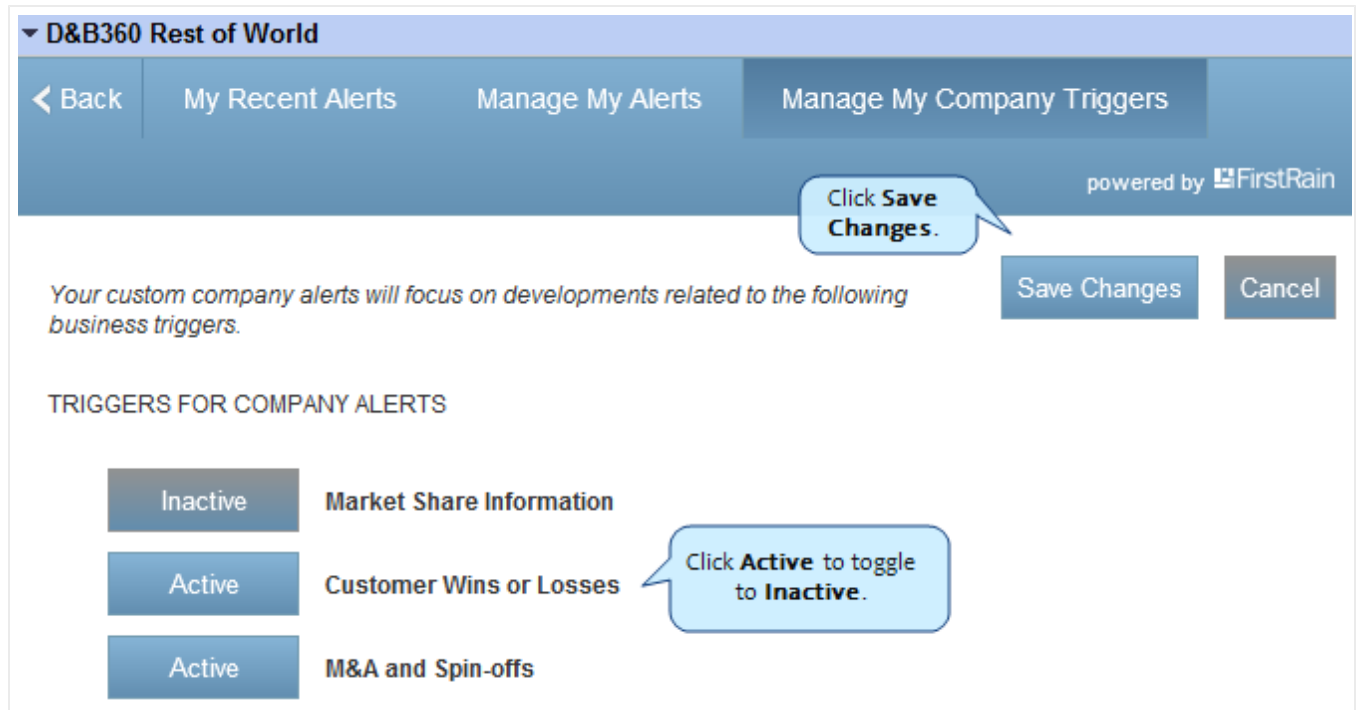
Your Alerts Save Changes Cancel

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

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



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

Creating a New Account Using Name and Address	3-2
Creating a D&B360 Account Based on a List of Criteria	3-4
Criteria Categories	3-4
Creating a D&B360 Account Based on Attributes of a Specific Account	3-5
Creating a D&B360 Account from Records Related to Existing Accounts	3-7
Reviewing Results when Searching by Family Tree Hierarchy	3-8
Creating a D&B360 Account from Competitors	3-9

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.

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.

Employee Respo... 0000000650 Employee Name:

Account role Account

This action will create 1 account record in your CRM.

Do you wish to continue?

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 your **Homepage**, click **Accounts with D&B360**.
2. (Required) In the **Account Search** window, **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. To display a list of candidates based on your search criteria, click **Search**.

D&B Account Search

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

D&B360 Account Search

Company Name*: Dell

City: Round Rock

Address:

Phone:

Country*: United States

State/Province**: Texas

Postal Code:

*Required Fields
** Required only in United States and Canada

6. Next to the **Company Name** that best matches your search criteria, click **Add**.

Note: To review the match information before you make a decision, do not click Add. Instead, see the steps that follow.

D&B360 Account Search

D&B360 Account Results

Matching Companies: 25

Action	Info	Company Name	Address	City	State/Province	Country	Postal Code	Phone	Location Status
Add	95195	★ DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(512) 338-4400	ParentHeadquarte
Add	*****5955	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000		BranchDivision
Add	*****0088	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(877) 717-3355	BranchDivision
Add	*****1781	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000		BranchDivision
Add	*****7503	DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	78682-7000	(512) 338-4400	BranchDivision

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.

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

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

D&B360 Account Search

D&B360 Account Results

Matching Companies: 25

Actions	Match Info	Address	City	State/Province
Add	95	1 DELL WAY	ROUND ROCK	TX
Add	55	1 DELL WAY	ROUND ROCK	TX
Add	*****0088	1 DELL WAY	ROUND ROCK	TX
Add	*****1781	1 DELL WAY	ROUND ROCK	TX
Add	*****7503	1 DELL WAY	ROUND ROCK	TX

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

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

– 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 all available options, which you locate by specifying a set of unique criteria.

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

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

2. Enter the specific criteria for your search.
3. Click **Company Search**.
4. Next to the account you want to use for your search criteria, click to select the checkbox.
5. To create the new account, click **Create**.

[See "Using Build a List" on page 7-1](#) for more information about each of the categories. You will not use the People section for company searches.

The screenshot shows the D&B360 Build A List interface. At the top, there is a menu item 'DnB360 Build A List' circled in red. Below it is a 'Build a List' panel with tabs for 'Search', 'People Results', and 'Company Results'. The 'Company Search' tab is selected and circled in red. Below the panel, the 'D&B360 Company Results' section is visible, featuring a 'Create' button circled in red. Below the 'Create' button, there is a table of company results. The first row is circled in red, showing a checkbox, D-U-N-S number '*****0502', Company Name 'Austin Ribbon & Computer Supplies, Inc.', Address '9211 Waterford Centre Blvd.', City 'Austin', State/Province 'TX', Country 'UNITED STATES', and Phone '512-4...'. The second row shows a checkbox, D-U-N-S number '*****0652', Company Name 'Columbia Dell Inc', Address '1 Dell Way', City 'Round Rock', State/Province 'TX', Country 'UNITED STATES', and Phone '512-3...'. The 'Create Account' column header is also circled in red.

<input type="checkbox"/>	Create Account	D-U-N-S	Company Name	Address	City	State/Province	Country	Phone
<input type="checkbox"/>		*****0502	Austin Ribbon & Computer Supplies, Inc.	9211 Waterford Centre Blvd.	Austin	TX	UNITED STATES	512-4...
<input type="checkbox"/>		*****0652	Columbia Dell Inc	1 Dell Way	Round Rock	TX	UNITED STATES	512-3...

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](#).

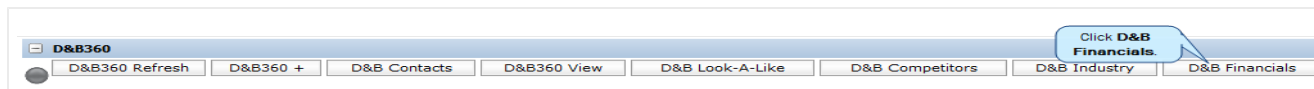
Links to this specific category details section are provided below to identify the information collected for:

- [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

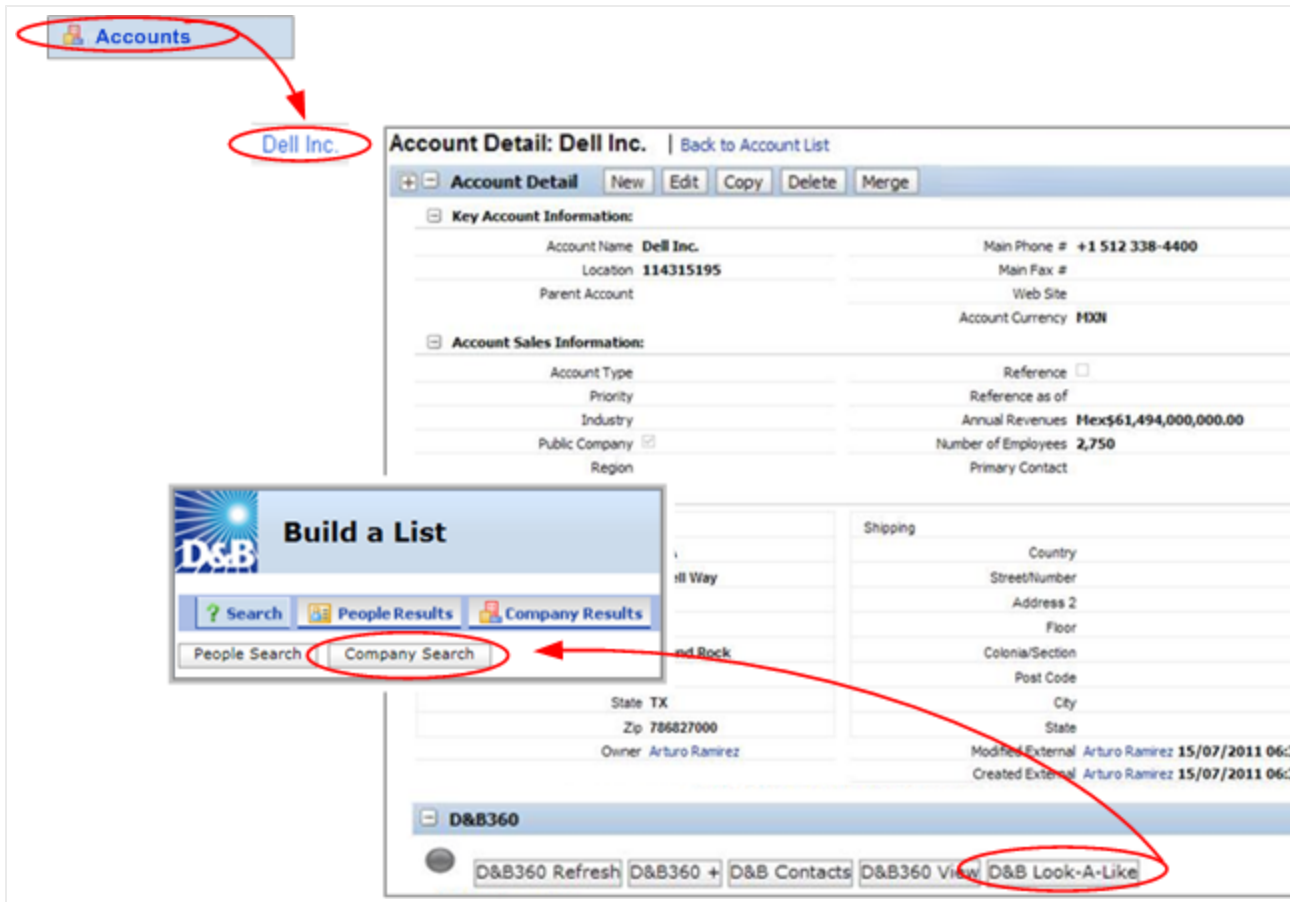
You can create a list of companies that share the attributes of an existing account. You can then choose an account from that list and create a new account.

1. Click the **Accounts** tab.
2. To open the **Account Detail** window for a specific account, click to select it.
3. To open the **Build a List** window with account detail information for that account, click **D&B Look-A-Like**.



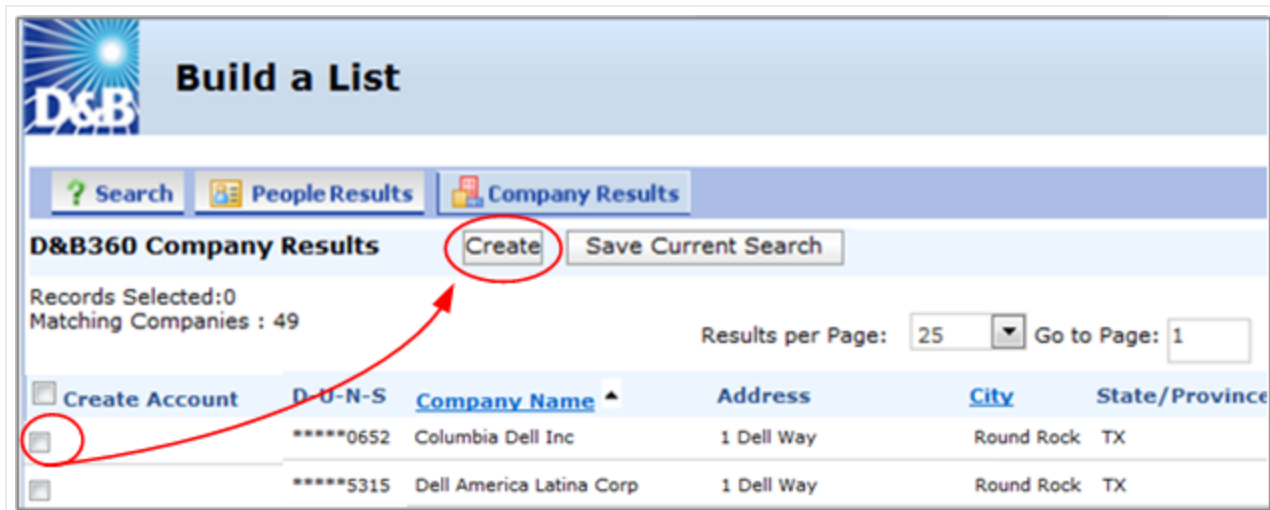
4. In the **Build a List** window, click **Company Search**.

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



- 5. To select the account that you want to create, click the one that is similar to your original account.
- 6. Click **Create**.

A window opens to inform you that the Accounts are creating. After the account is created, a green status icon replaces the yellow one, and the account name displays in the **Account** column.



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 use it as the basis for a search.

1. In the main menu, click **Accounts** to display a list of your existing accounts.
2. Click an existing account that you want to pursue.
3. In the **Account Detail** window, click **D&B360 View**.
4. In the **Related Accounts** window, to enter family tree information, click **Family Tree Query** or **Family Tree Hierarchy**.

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

The screenshot illustrates the navigation process. At the top, the 'Accounts' menu item is circled in red. Below it, the 'Account Detail: Dell Inc.' window is shown with the 'D&B360 View' button circled in red. A red arrow points from this button to the 'D&B 360 View' window. In this window, the 'Family Query' tab is circled in red. Below the tabs, a table lists related accounts for Dell Inc. in Texas, all owned by Arturo Ramirez.

DUNS	Account Name	State	Active Opportunities	Closed Opportunities	Account Owner	Risk Level*
114315195	Dell Inc.	Texas	0	0	Arturo Ramirez	●
058058590	Dell Inc.	Texas	0	0	Arturo Ramirez	●
043922751	Dell Inc.	Texas	0	0	Arturo Ramirez	●
619153880	Dell Inc.	Texas	0	0	Arturo Ramirez	●

After you select the **Family Tree Query** or **Family Tree Hierarchy** tab, you can filter the list on U.S.-only records or Non-U.S.-only records by clearing the check marks. To receive all records, leave both selected.

Note: 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.

5. Make sure the filtering criteria you selected is what you want.
6. Click **Search**.
7. To identify the accounts you want to create, select the corresponding checkboxes. If the record is already in your database as an account, the duplicate account icon, a yellow triangle, will display next to that account.
8. Click **Create**, then wait until the status indicator displays in green.

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

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

D&B 360 View

Account Detail

[Go Back to Account Detail](#)

[Related Accounts](#) [Family Query](#) [Family Tree](#)

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

Account Name: Dell Inc. **Global Ultimate Name:** Dell Inc.
DUNS: 114315195 **Global Ultimate DUNS:** 114315195
Tree Levels: 2

Location: Country of global Ultimate Other Countries **Type:** Subsidiaries Branches

Search

Create

Companies Results: Matching Companies: 77

Create Account	DUNS	Company Name	Association Type	City	State	Country
<input type="checkbox"/>	*****5195	DELL INC.		ROUND ROCK	TX	US
<input type="checkbox"/>	*****4492	DELL FINANCIAL SERVICES L.P.	ParentSubsidiary	AUSTIN	TX	US
<input type="checkbox"/>	*****3092	DELL CORPORATION	ParentSubsidiary	SKOKIE	IL	US


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.

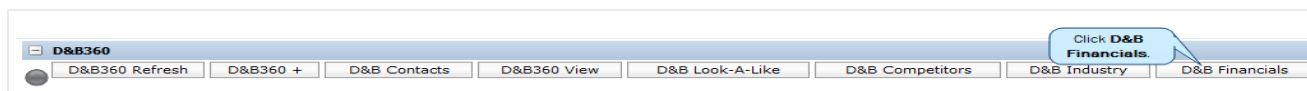
1. Complete these steps to search by Family Tree Hierarchy:
2. Make sure you have selected the filtering criteria that you want to filter on.
3. Click **Search**.
4. To identify the accounts that you want to create, click the corresponding check boxes.

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.

1. From the main menu, click **Accounts**.
2. Click an existing account you want to pursue.
3. In the **Account Detail** window, **D&B360** menu, to display a list of competitors, click **D&B Competitors**.



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

The screenshot shows the D&B360 user interface. At the top, the 'Accounts' menu is circled in red. Below it, the 'Account Detail: Dell' page is visible, with the 'D&B Competitors' button also circled in red. The main content area displays 'Competitors - Dell Inc.' with a table of matching companies. The 'City' column in the table is circled in red. A red arrow points from the 'Accounts' menu to the 'D&B Competitors' button, and another red arrow points from the 'D&B Competitors' button to the 'City' column header. A red circle highlights the 'Create' checkbox for the first row in the table.





<input type="checkbox"/>	Account	D-U-N-S	Company	City	State/Province	Country	Annual Sales	Top Competitor
<input type="checkbox"/>		*****1980	Positive Informatica S.A.	Curitiba	Paraná	Brazil	\$1,393.30	
<input type="checkbox"/>		*****4795	Lenovo Group Limited			Hong Kong	\$21,594.37	✓
<input type="checkbox"/>		*****9493	HCL Infosystems Limited	Noida	Uttar Pradesh	India	\$2,408.32	
<input type="checkbox"/>		*****8509	Brother Industries, Ltd.	Nagoya		Japan	\$6,067.65	
<input type="checkbox"/>		*****9639	Seiko Epson Corporation	Suma	Nagano	Japan	\$11,749.19	
<input type="checkbox"/>		*****3517	Toshiba Corporation	Tokyo		Japan	\$69,853.02	
<input type="checkbox"/>		*****3649	Sony Corporation	Tokyo		Japan	\$86,656.42	
<input type="checkbox"/>		*****1685	NEC Corporation	Tokyo		Japan	\$37,593.82	

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.

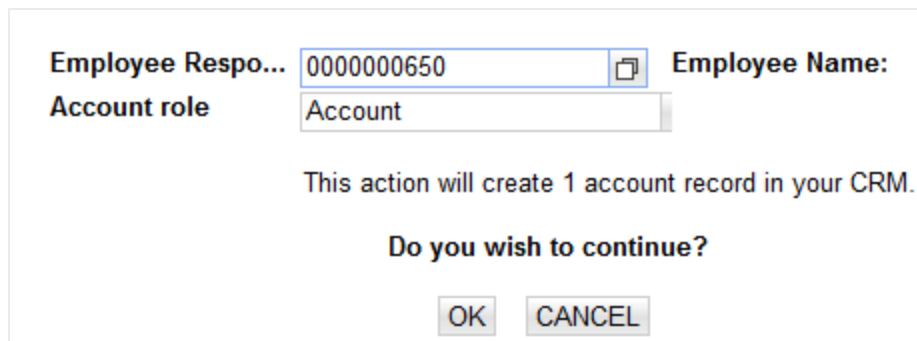
Leveraging ROW	4-2
Adding D&B Data to an Existing Account	4-2
Identifying Related Accounts in D&B360	4-4
Displaying and Adding Industry Information about Existing Accounts	4-5
Displaying Industry Information	4-5
Adding an Industry to an Existing Account	4-6
Leveraging Industry Information	4-7
Adding Financial Information to Existing Accounts	4-9

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 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 elements:

- Employee Respo...** (truncated) with a text input field containing "0000000650" and a copy icon.
- Employee Name:** (truncated) with an empty text input field.
- Account role** with a 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".

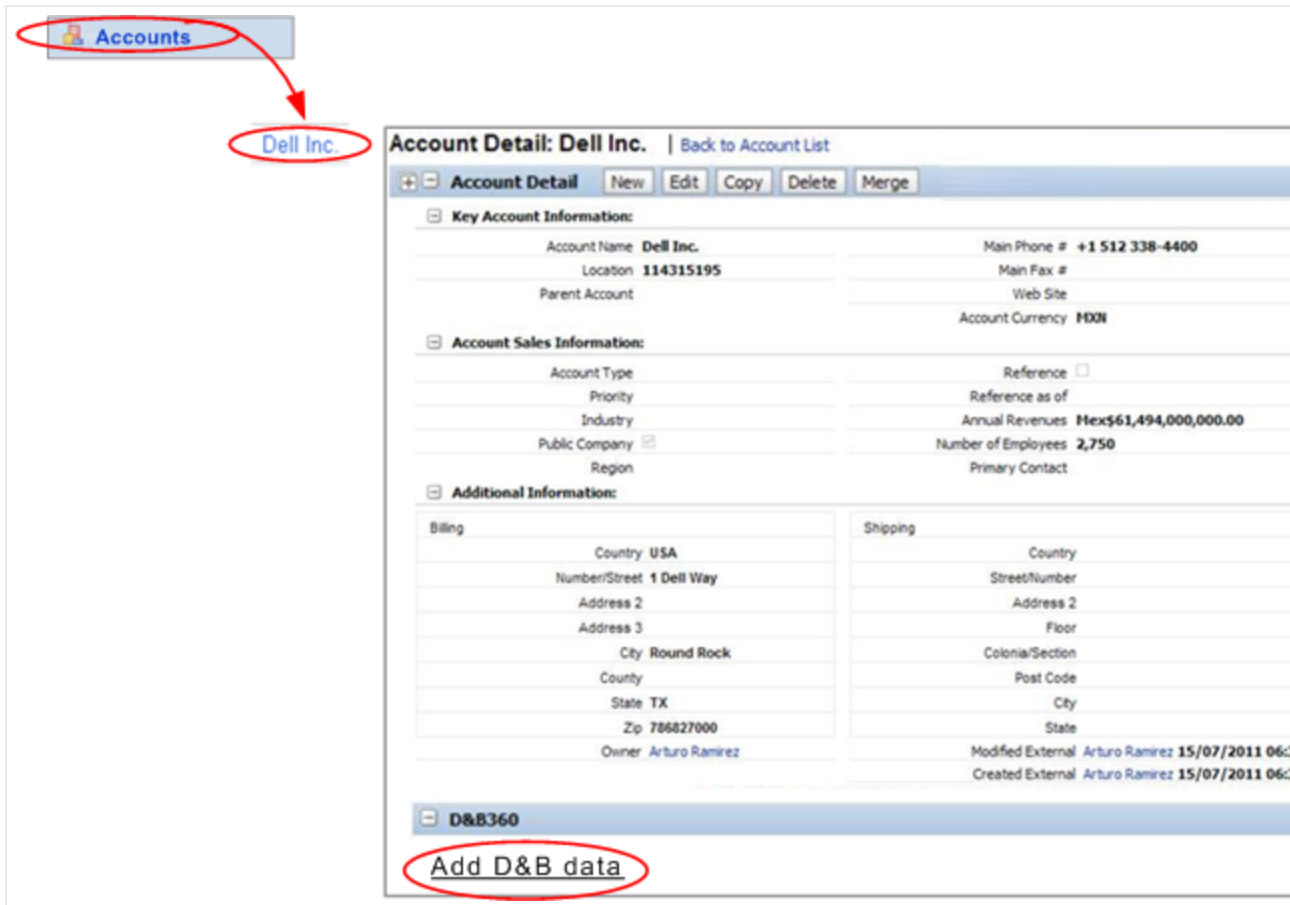
Leveraging ROW

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 main menu, select **Accounts**.
2. In the **Account Homepage** window, click an account that needs D&B data.
3. In the **Account Detail** window for that account, **D&B360** area, click **Add D&B Data**.
4. In the **Account Search** window, click **Search**.



5. In **D&B360 Account Results** window, locate the account you want to use, and click **Select**.
6. After you identify which data you want to use to update the account, select any data you do not want to include to clear it.
7. To update your account with the selected D&B data, click **Update**.

D&B360 Account Results

Matching Companies:25

Actions	Match Info	Company Name	Address	City	State/Province	Country	Postal Code	Phone	Location Sta
Select	*****5195	★ DELL INC.	1 DELL WAY	ROUND ROCK	TX	US	786827000	5123384400	ParentHeadqu
	*****0769	DELL INC		DALLAS	TX	US	753890001		BranchDivision

D&B 360 Refresh

Update Cancel

Examine the data you have for this account in Microsoft CRM and the data available from D&B below. Any differences will be updated with D&B's information. If you do not wish to overwrite a data point in Microsoft CRM, uncheck the box in the Update column.

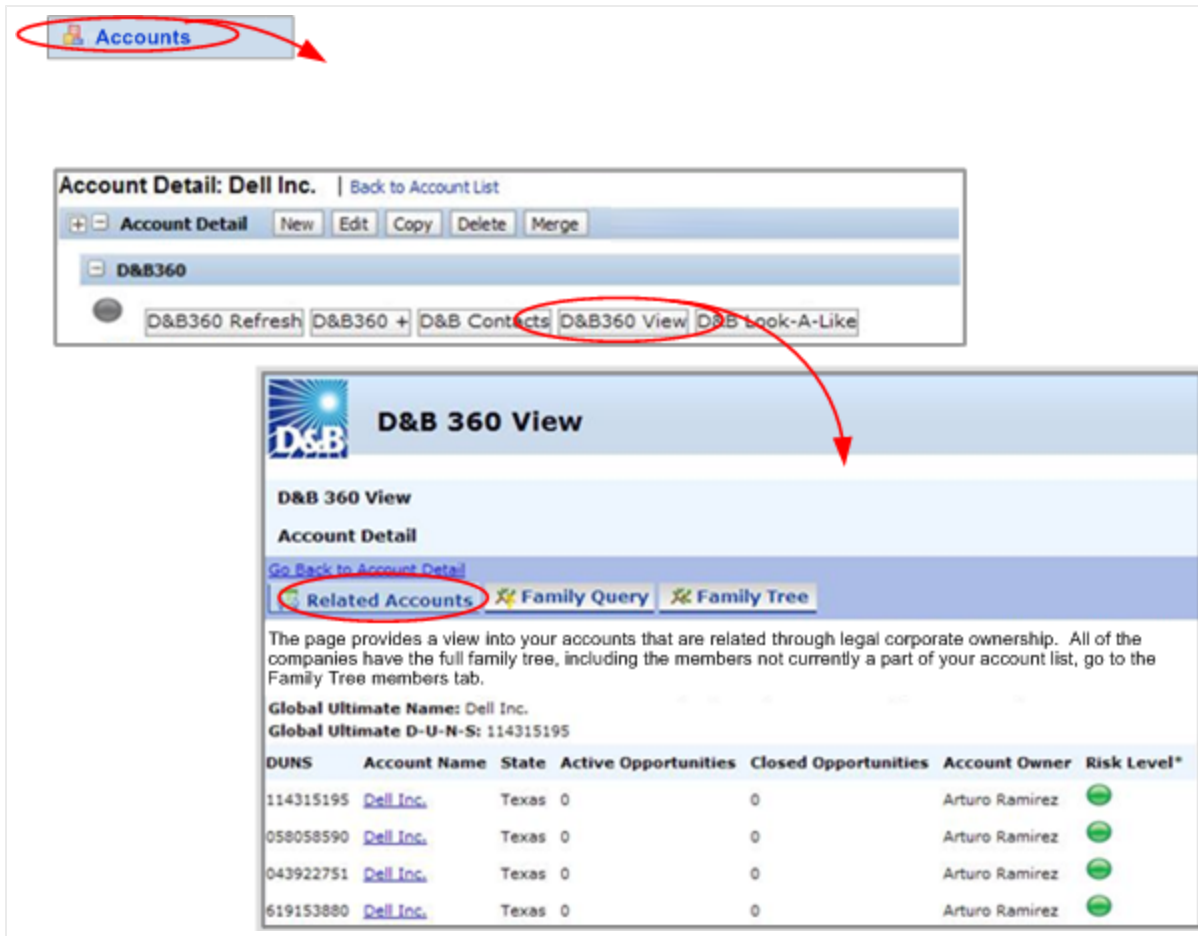
Account Object Field	Oracle Account Data	D&B's Data	Update
Billing Street	1 Dell Way	1 Dell Way	<input type="checkbox"/>
Billing City	Round Rock	Round Rock	<input type="checkbox"/>
Billing State	TX	TX	<input type="checkbox"/>
Billing Country	USA	USA	<input type="checkbox"/>
Description	Dell wants its name to ring from the desktop to the data center. One of the world's top suppliers of PCs, the company offers a broad range of technology products for the consumer, education, enterprise, and government sectors. In addition to a full li	Dell wants its name to ring from the desktop to the data center. One of the world's top suppliers of PCs, the company offers a broad range of technology products for the consumer, education, enterprise, and government sectors. In addition to a full li	<input type="checkbox"/>
Billing Postal Code	786827000	786827000	<input type="checkbox"/>
Phone	5123384400	5123384400	<input type="checkbox"/>
Mailing Street			<input type="checkbox"/>
Mailing City			<input type="checkbox"/>
Mailing State			<input type="checkbox"/>
Mailing Country			<input type="checkbox"/>
Annual Revenue	61494000000	61494000000	<input type="checkbox"/>
Account Name	Dell Headquarters	Dell Inc.	<input checked="" type="checkbox"/>
Location	114315195	114315195	<input type="checkbox"/>
Number of Employees	2750	2750	<input type="checkbox"/>

Cancel Update

Identifying Related Accounts in D&B360

1. To list your existing accounts, click the **Accounts** tab.
2. Click an existing account that you want to pursue.
3. In the **Account Detail** window, click **D&B360 View**.

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. [See "Creating a New Account in D&B360" on page 3-1](#)

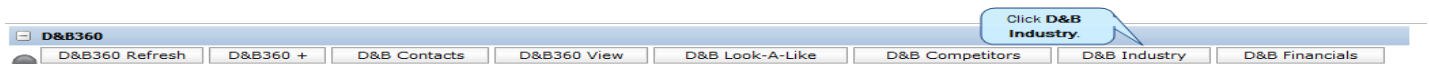


Displaying and Adding Industry Information about Existing Accounts

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.

Displaying Industry Information

1. In the main menu, select **Accounts**.
2. Click the name of an account for which you want to view industry information.
3. In the **Account Detail** window, **D&B360** menu, click **D&B Industry**.



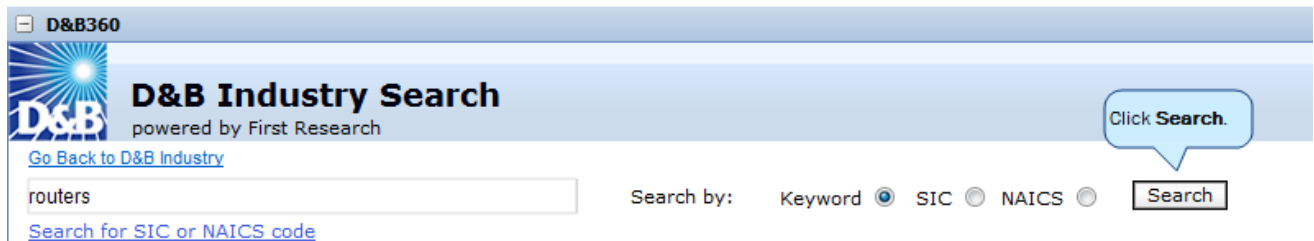
The **D&B Industry** window for the account you selected opens and displays a list of that account's related industries. If you don't see a related industry you believe should be included, you can add it ([see "Adding an Industry to an Existing Account" on page 4-6](#)). For more details about how to use this information, [see "Leveraging Industry Information" on page 4-7](#).

Adding an Industry to an Existing Account

1. In the **D&B Industry** window, to add an industry, click **Add Industry**.



2. In the **D&B Industry Search** window, type a keyword, SIC code, or NAICS code.
3. Select the corresponding radio button, and then click **Search**.



4. In the column next to an industry code you want to associate with this account, select the check box and then click **Associate**.

D&B Industry Search
powered by First Research

[Go Back to D&B Industry](#) [About D&B360](#)

Search by: Keyword SIC NAICS Search

[Search for SIC or NAICS code](#)

Industry Code	Industry Detail
1098	Wireless Networking Equipment Manufacturing design and manufacture networking equipment used to wirelessly connect computers to a network. Products include routers, gateways, PC cards, and related equipment.
1097	Storage Networking Equipment Manufacturing design and manufacture networking equipment used to build networked data storage systems. Products include switches, routers, and directors used to create storage area networks (SANs). Common storage network technologies include Fibre Channel and iSCSI.
1096	Routing & Switching Equipment Manufacturing design and manufacture routers, switches, bridges, gateways, transceivers, repeaters, hubs, concentrators, and related data networking devices. This equipment is designed to enable voice and data transmission over networks.
1093	Computer Networking Equipment Manufacturing network access and communication devices, routing and switching equipment, storage networking equipment, and wireless networking products.
1577	Telecommunications Services voice, data, and video communications services.
1584	Internet Service Providers provide Internet access and related services.
1904	Internet Publishing, Broadcasting & Search Portals content on the Internet or operate search engine Web sites.

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

In the **D&B360 Results** window, a green status icon displays after the industry has been successfully associated with this account.

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

To display industry details about a type of industry, do the following:

1. In the **Industry Detail** list, select a category from the list. In this example, we selected **Personal Computer Manufacturing** from the **Industry Detail** list.



2. In the D&B Industry window click a category, for example, **Industry Indicators**.



3. In the D&B Industry Detail window, double-click any of the links for the category you previously selected. This will expand that area and display more information.



D&B Industry Detail
powered by First Research

Personal Computer Manufacturing

Description

Business Challenges

Call Preparation Questions

Executive Insight

Glossary Of Acronyms

Industry Indicators Click to expand a topic.

US durable goods manufacturers' shipments of computers and related products, an indicator of personal computer production, fell 8.1 percent year-to-date in September 2012 compared to the same period in 2011.

US retail sales for electronics and appliance stores, a potential measure of demand for personal computers, decreased 0.8 percent in the first ten months of 2012 compared to the same period in 2011.

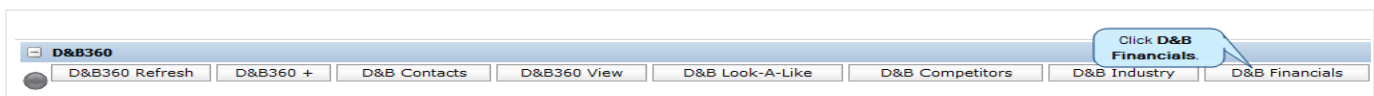
Industry Overview

Industry Websites

Trends And Opportunities

Adding Financial Information to Existing Accounts

1. To list your existing accounts, click the **Account** tab.
2. Select an existing account.
3. In the **Account Detail** window, click **D&B Financials** to open the **D&B Financials** window for this account,



D&B360

D&B360 Refresh | D&B360 + | D&B Contacts | D&B360 View | D&B Look-A-Like | D&B Competitors | D&B Industry | **D&B Financials**

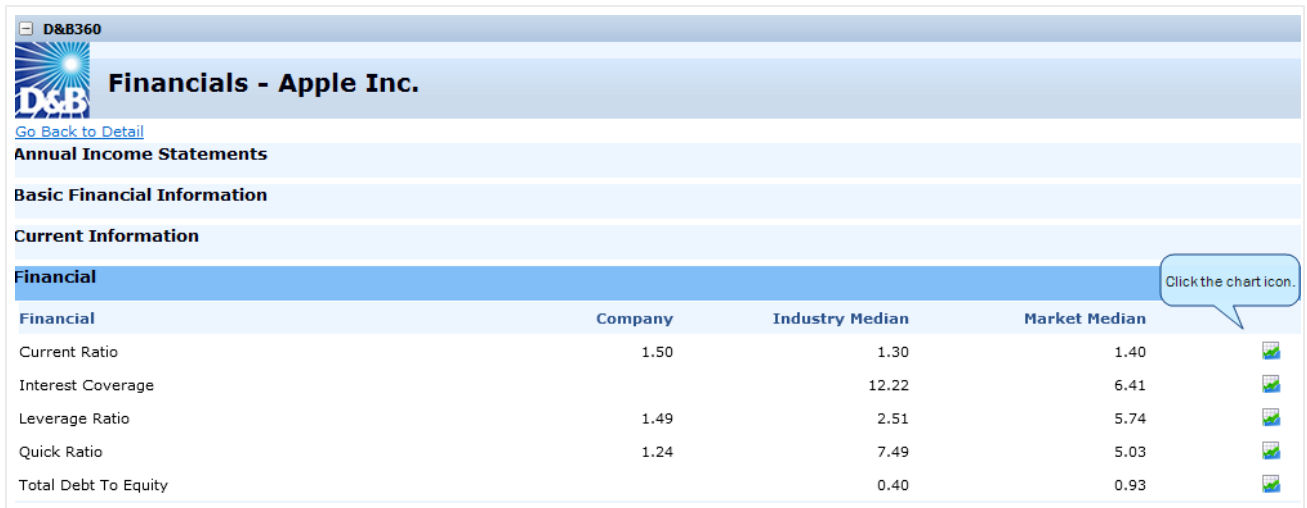
Click D&B Financials

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

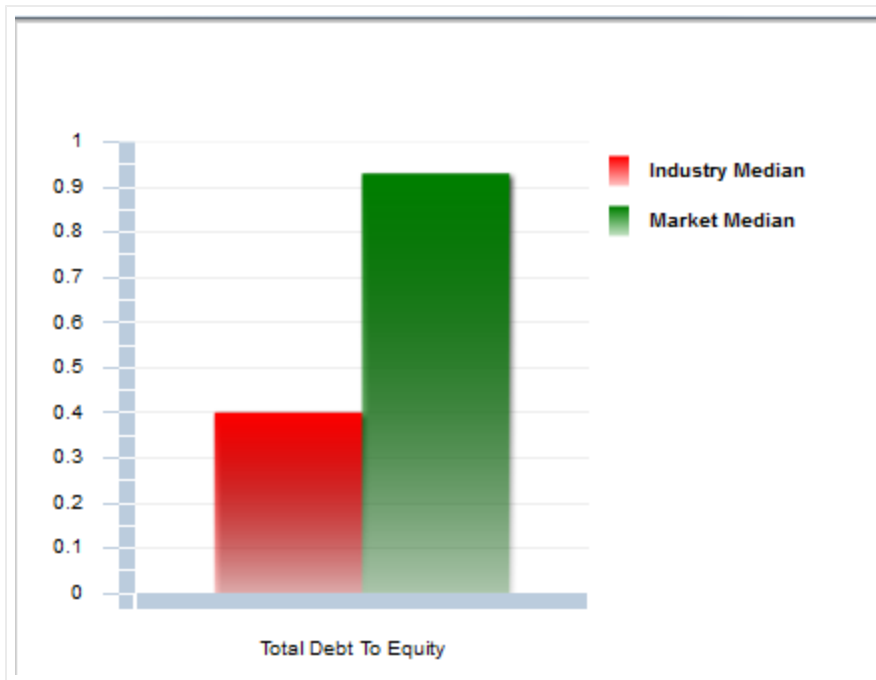
4. To drill farther down into the available information, double-click any of the categories.



- To view the data visually on all but basic and current information, 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	5-6
Merging Duplicated Contacts	5-7

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.

Employee Responsible <input type="text" value="0000000650"/> <input type="button" value="📄"/> Account role <input type="text" value="Account"/> ▼	Employee Name: <input type="text" value="John Brown"/> 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

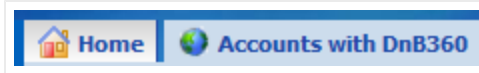
Leveraging ROW

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 **D&B360** menu, click **Accounts with D&B360**.

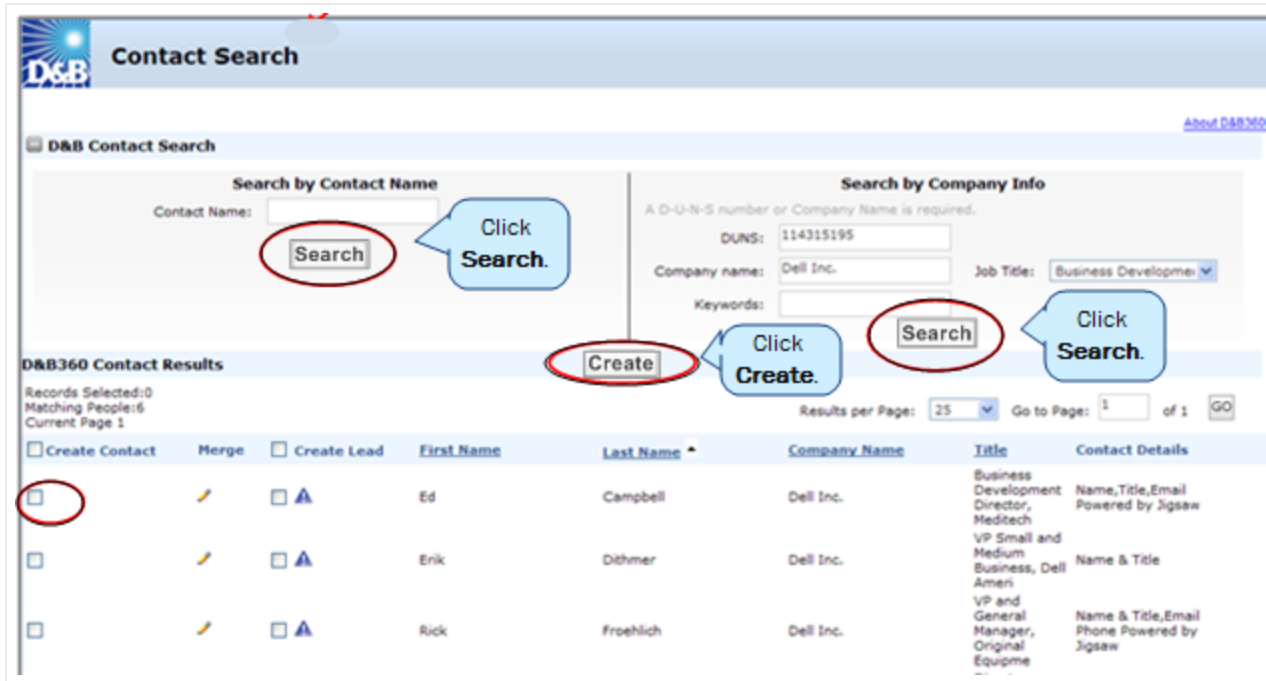


2. From the list that displays, click an existing account to select it
3. In the **Account Detail** window, click **D&B360 Contacts** to display a list of potential contacts.

 A screenshot of the 'Account Detail' window for 'Apple Inc.'. The window title is 'Account Detail | Back to Accounts with DnB360' and it includes links for 'Edit Layout | Help | Print'. Below the title bar are buttons for 'New', 'Edit', 'Copy', 'Delete', and 'Merge'. The main content area is divided into sections:

- Key Account Information:**
 - Account Name: **Apple Inc.**
 - Location: **019312317**
 - Parent Account:
 - DnB Company: **019312317**
 - DnB Credit:
 - DnB Association Date: **12/28/2012**
 - DnB Association Status: **Created**
 - DnB Industries:
 - Main Phone #: **+0016508380921**
 - Main Fax #:
 - Web Site:
 - Account Currency: **USD**
 - External Unique ID:
- Account Sales Information:**
- Additional Information:**
- Available Section:**
- D&B360:**
 - D&B360 Refresh
 - D&B360 +
 - D&B Contacts** (highlighted with a blue callout bubble that says 'Click D&B Contacts.'
 - D&B360 View
 - D&B Look-A-Like
 - D&B Competitors
 - D&B Industry
 - D&B Financials

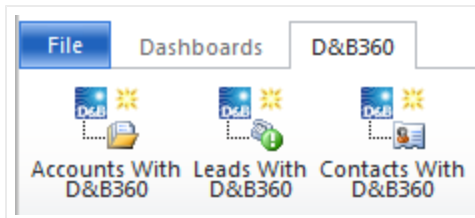
4. In the **Contact Search** window, **Search by Contact Name** area **Contact Name** field, type the name of the contact you are interested in.
5. Click **Search**.
6. Click to select contacts you want to add.
7. To add the selected contacts, click **Create**.



Adding a Contact from D&B360 Directly

Option 1: To find contacts from a specific company, search by **Company Info**.

1. From the **D&B360** menu, select **Contacts with D&B360**.



2. In the **Company Name** field, type the name of the company as the criteria for search, then click **Search**.

Note: To select multiple job titles, click one title and use the CTRL key to select all the titles that you want to include.

- Next to the contact you want to add, in the **Create Contact** column, click to select the check box, then click **Create**.

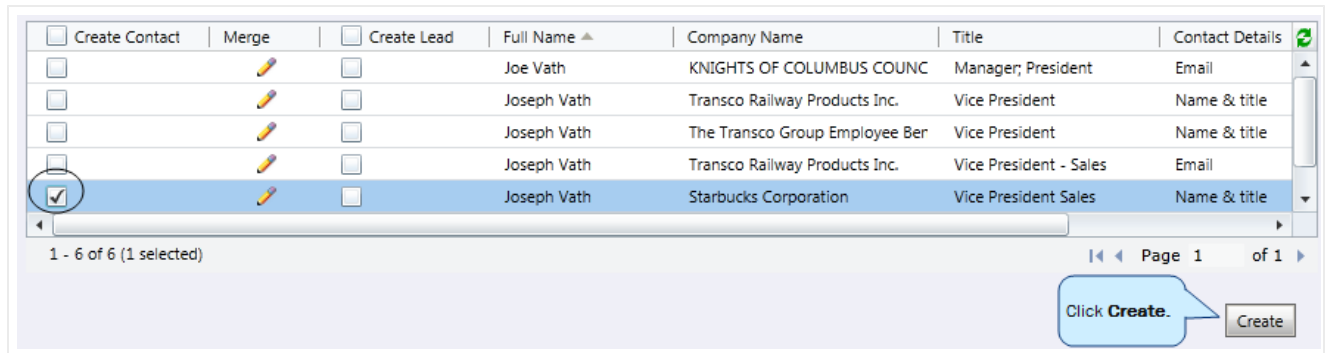
<input checked="" type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Lead	Full Name ▲	Company Name	Title	Contact Details
<input checked="" type="checkbox"/>		<input type="checkbox"/>	Joseph Vath	Starbucks Corporation	Vice President Sales	Name & title

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

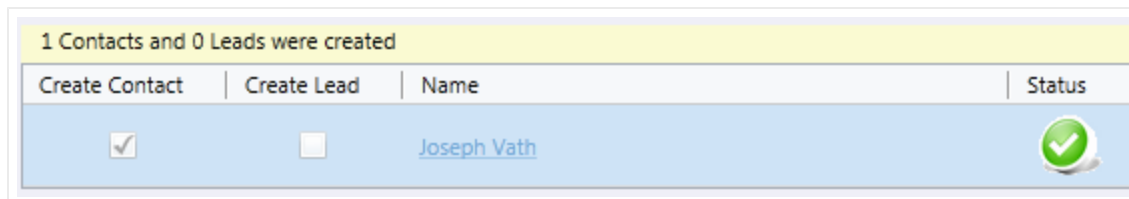
Click **Create**.

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

- In the **Search by Contact Name** field, type the contact name as criteria for search.
- On the left side of the **D&B Contact Search** window, below the **Search by Contact Name** area, click **Search**.



A green status icon displays to indicate that the contact was created.



Adding a Contact Using Build-A-List

1. Click **D&B360 Build A List**.
2. In the **People** section, enter prospect criteria.
3. In any of the **Company** sections, enter prospect criteria.
4. To display a list of candidates, click **People Search**.

Records Selected: 0
Matching People: 6954
Current Page 1

Results per Page: 25 Go to Page: 11

<input type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Lead	First Name	Last Name	Company Name	Title	Company
<input type="checkbox"/>		<input type="checkbox"/>	Joann	Aaronson	Dell Inc.	Ae-dell Major Public Accounts Field-east	Nar Pov
<input type="checkbox"/>		<input type="checkbox"/>	Nick	Abbatiello	Dell Inc.	Senior Operations Engineer	Nar Pov
<input type="checkbox"/>		<input type="checkbox"/>	Michael	Abbott	Dell Inc.	Service Delivery Manager	Nar by

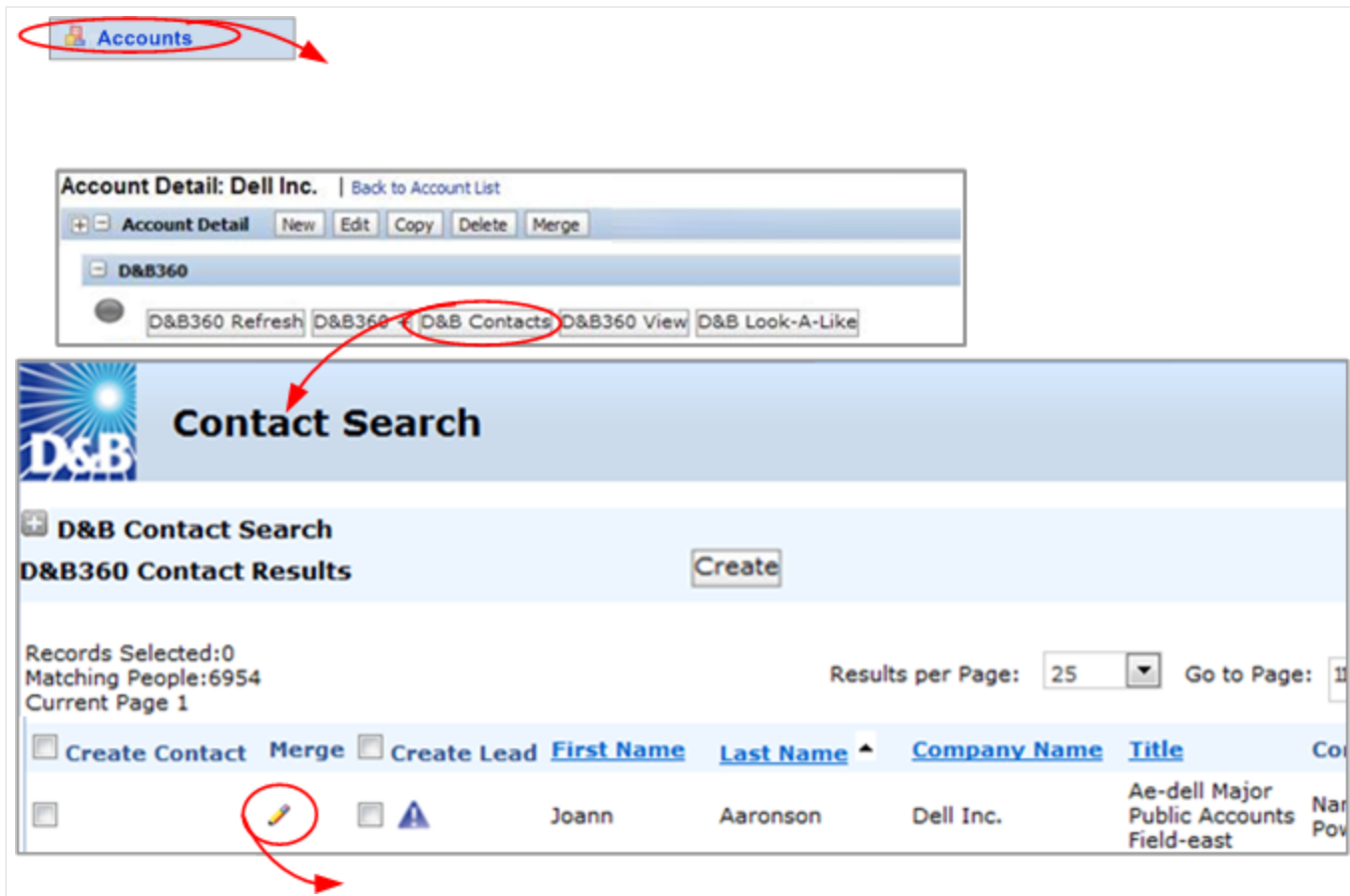
5. In the **Create Contact** column, click next to the candidate you have selected.
6. Click **Create**.

Merging Duplicated 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, click the **Accounts** tab.
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 indicates another account that is very similar to one that already exists. Consider whether to merge these accounts.
4. Next to the account you want to merge, click the pencil icon.



5. Select the candidate that you want to merge.
6. The **Contact Merge** window opens and displays the compare & merge information.
7. Verify that the check marks display for any information you want to retain after the merge so it will not be lost.
8. Click **Merge**.

In the following example, we have the correct spelling for the contact name. We need to clear that checkbox so the correct spelling is not overwritten on the first name. The last name does not need to be merged. We want the phone number to merge, so that checkbox is selected. The title we currently have for this contact has more complete information, therefore we clear that check box to prevent it from being overwritten.

Contact Merge

First Name: Jo Anne Last Name: Aaronson
Title: Ae-Dell

Action	First Name	Last Name	Title
Select	Joann	Aaronson	Ae-Dell Major Public Accts Field

Please select a Contact to compare & merge.

Oracle CRM Contact Data		D&B Contact Data	Merge
Fist Name	Joann	Jo Anne	<input type="checkbox"/>
Last Name	Aaronson	Aaronson	<input type="checkbox"/>
Phone		503-799-6149	<input checked="" type="checkbox"/>
Email			<input type="checkbox"/>
Title	Ae-Dell Major Public Accts Field east	Ae-Dell	<input type="checkbox"/>

Merge



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	6-1
Creating a D&B360 Lead from a Contact	6-1
Creating a Lead from an Existing Account	6-2
Creating a D&B360 Lead Manually	6-3
Creating a D&B360 Lead Based on a List of Criteria	6-4
Creating a D&B360 Lead Based on Attributes of Specific Accounts	6-5
Creating a D&B360 Lead from a Competitor	6-6

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 6-1.](#)

Creating a D&B360 Lead from a Contact

1. If you've 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.
2. Click **Contacts with D&B360**.
3. Enter one or more of the search criteria fields such as **Contact Name**, **D-U-N-S**, and so on.
4. Click **Search**.

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

Contacts with D&B360

Contact Search

D&B Contact Search

Search by Contact Name
Contact Name: **Search**

Search by Company Info
A D-U-N-S number or Company Name is required.
DUNS: 114315195
Company name: Dell Inc. Job Title:
Keywords: **Search**

D&B Contact Search
D&B360 Contact Results

Records Selected: 0
Matching People: 6954
Current Page 1

Results per Page: 25 Go to Page: 11

<input type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Lead	First Name	Last Name	Company Name	Title	Co
<input type="checkbox"/>		<input checked="" type="checkbox"/>	Joann	Aaronson	Dell Inc.	Ae-dell Major Public Accounts Field-east	Nar Pov
<input type="checkbox"/>		<input type="checkbox"/>	Nick	Abbatiello	Dell Inc.	Senior Operations Engineer	Nar Pov
<input type="checkbox"/>		<input type="checkbox"/>	Michael	Abbott	Dell Inc.	Service Delivery Manager	Nar by

The blue warning 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 Existing Account

1. Click **Leads With D&B360**.
2. In the D&B Create Lead Company Search window, type the company name and address from which you want to create a lead. Enter at least the **Company Name**, **Country**, and **State** for that account.
3. To display a list of companies, click **Search**.
4. To associate your search for leads to a specific company, highlight the appropriate row and click **Select**.

This opens the **Lead Details** window for you to review.

The screenshot shows the 'Create Lead' interface in D&B360. At the top, there is a navigation bar with 'Leads with DnB360' highlighted in a red circle. Below this is the 'Create Lead' header. The main area is divided into 'Search Criteria' and 'Search Results'.

Search Criteria:

- Search by Contact Name:** Contact Name: Search
- Search by Company Info:**
 - Company Name*: Dell
 - Country*: United States
 - City:
 - State/Province*: Texas
 - Address:
 - Postal Code:
 - Phone:
 - Search:

Search Results:

Create Lead

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

Total Hits: 6954
Current Page 1

Results per Page: 25 Go to Page: 1 of 279 GO

Create Lead	First Name	Last Name	Company Name	Title	Contact Details
Select	Joann	Aaronson	Dell Inc.	Ae-dell Major Public Accounts Field-east	Name, Title, Email Phone Powered by Jigsaw
Select	Nick	Abbatiello	Dell Inc.	Senior Operations Engineer	Name, Title, Email Phone Powered by Jigsaw
Select	Michael	Abbott	Dell Inc.	Service Delivery Manager	Name, Title, Email Powered by Jigsaw
Select	Richard	Abderrhamane	Dell Inc.	Snp Smb Round Rock Inside Sales Represen	Name, Title, Email Phone Powered by Jigsaw
Select	Max	Abelardo	Dell Inc.	Solutions Consultant Advanced Customer Ex	Name, Title, Email Phone Powered by Jigsaw

Creating a D&B360 Lead Manually

When you run a D&B People search to create a lead and the contact is not found, you will have to manually complete the process of establishing a lead.

1. Begin a people search in the **Leads with DnB360** window.
2. In the **Create Lead** window, type in the required fields, then click **Search**.
3. If you don't find what you are looking for, run a **People Search**.
4. If the contact you searched for is not found, the window displays that information.
5. Click **create lead manually**.

6. Type in the appropriate information for the lead you want to manually create.
7. Click **Create Lead**.

The screenshot shows the 'Create Lead' interface. At the top left is the D&B logo. The main heading is 'Create Lead'. Below this is a 'Search Criteria' section. Underneath, there's a 'D&B360 Contact Results' section with the text 'If contact not found, [Create lead manually](#)' where the link is circled in red. Below this, there are statistics: 'Total Hits: 6954' and 'Current Page: 1'. A 'Next' link is visible on the right. The main form area has a header with the D&B logo and the text 'Create Lead' and 'Select A'. The form fields are: 'Last Name*' (input field), 'First Name*' (input field), 'Title' (input field), 'Phone Number' (input field), and 'Email' (input field). At the bottom center of the form is a 'Create Lead' button, which is circled in red.

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

1. Click **D&B360 Build A List**.
2. In the **Build A List** window **People** section, enter prospect criteria.
3. In any of the **Company** sections, enter prospect criteria.
4. To display a list of candidates, click **People Search**.

Records Selected:0
Matching People:6954
Current Page 1

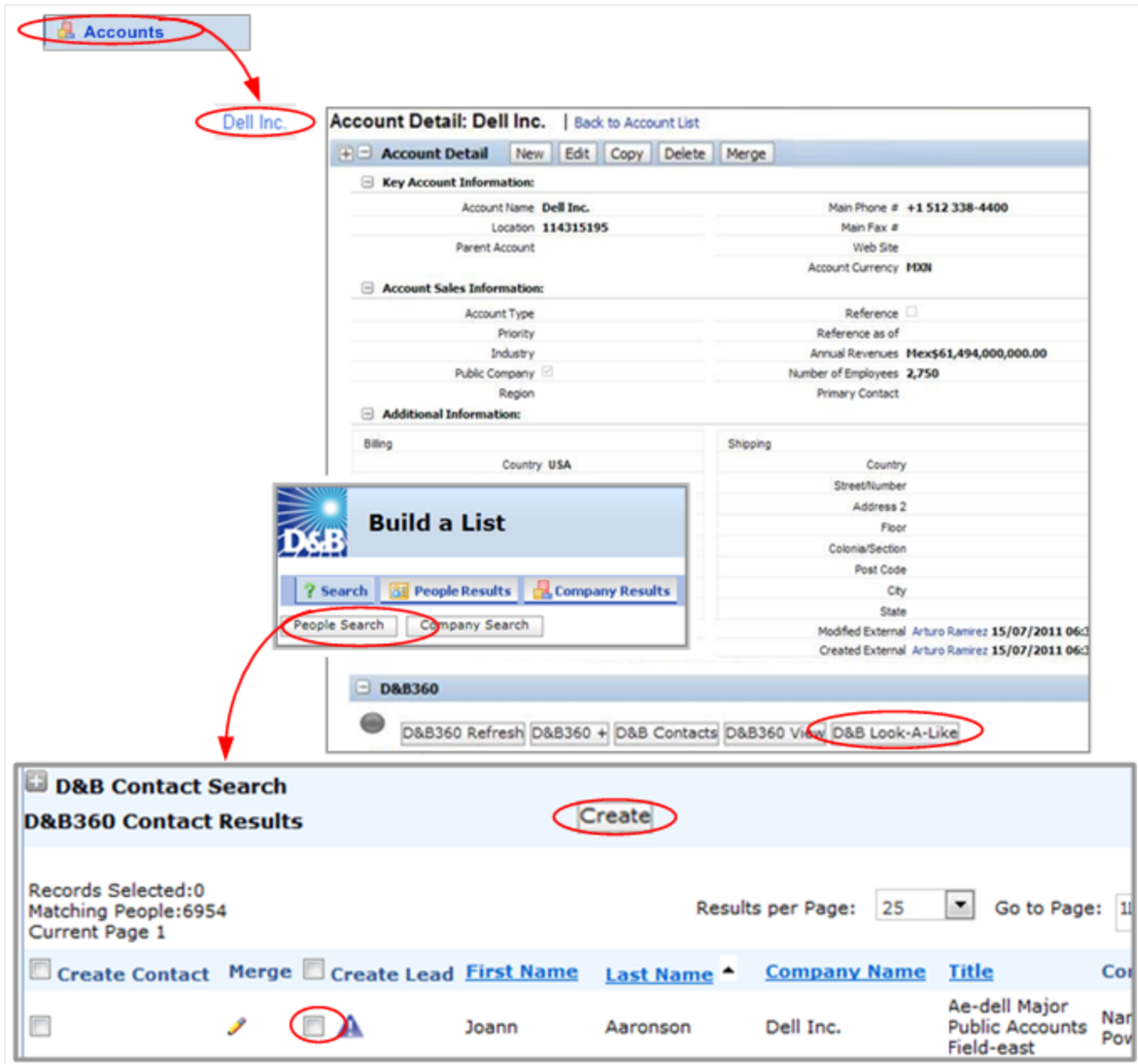
Results per Page: 25 Go to Page: 11

<input type="checkbox"/>	Create Contact	Merge	<input type="checkbox"/>	Create Lead	First Name	Last Name	Company Name	Title	Con
<input type="checkbox"/>			<input checked="" type="checkbox"/>		Joann	Aaronson	Dell Inc.	Ae-dell Major Public Accounts Field-east	Nar Pov
<input type="checkbox"/>			<input type="checkbox"/>		Nick	Abbatiello	Dell Inc.	Senior Operations Engineer	Nar Pov
<input type="checkbox"/>			<input type="checkbox"/>		Michael	Abbott	Dell Inc.	Service Delivery Manager	Nar by

5. In the **Create Lead** column, select the checkbox next to the candidate you have selected.
6. Click **Create**.

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

1. Click the **Accounts** tab.
2. In the list that displays, click an account select it.
This displays the **Account Detail** window for that account.
3. To open Build A List with Account Detail information included, click **D&B Look-A-Like**.
4. If you want to alter or add information, do so, then run **People Search**.
5. Review the People Results (not shown) and next to the candidate, and select **Create Leads**.
6. Click **Create**.



Creating a D&B360 Lead from a Competitor

1. To display a list of your existing accounts, click the **Accounts** tab.
2. To display the Account detail for an account in the list, click that account
3. To display a list of competitors, click **D&B Competitors**.
4. To search for individuals who work for that company, select the person icon next to a company of interest. The **Create Contact** window opens.
5. Using the form on this window, create a lead.

The screenshot displays the D&B360 user interface. At the top, the 'Accounts' menu is circled in red. Below it, the 'Account Detail: Dell' page shows a navigation bar with buttons for 'D&B360 Refresh', 'D&B360 +', 'D&B Contacts', 'D&B360 View', 'D&B Look-A-Like', 'D&B Competitors' (circled in red), 'D&B Industry', and 'D&B Financials'. The main content area is titled 'Competitors - Dell Inc.' and lists 28 matching companies. A table of competitors is shown with columns for D-U-N-S, Company, City, State/Province, Country, Annual Sales, and Top Competitor. A red circle highlights the 'Seiko Epson Corporation' entry. Below this, a 'Contact Search' window is open, showing 'D&B360 Contact Results' for 27 matching contacts. A table of contacts is displayed with columns for Full Name, Company Name, Title, and Contact Details. A red circle highlights the 'Create Lead' checkbox for Shuji Aruga.

Account	D-U-N-S	Company	City	State/Province	Country	Annual Sales	Top Competitor
<input type="checkbox"/>	*****1980	Positivo Informática S.A.	Curitiba	Paraná	Brazil	\$1,393.30	
<input type="checkbox"/>	*****4795	Lenovo Group Limited			Hong Kong	\$21,594.37	✓
<input type="checkbox"/>	*****9493	HCL Infosystems Limited	Noida	Uttar Pradesh	India	\$2,408.32	
<input type="checkbox"/>	*****8509	Brother Industries, Ltd.	Nagoya		Japan	\$6,067.65	
<input type="checkbox"/>	*****9639	Seiko Epson Corporation	Suwa	Nagano	Japan	\$11,749.19	
<input type="checkbox"/>	*****3517	Toshiba Corporation	Tokyo		Japan	\$69,853.02	





Full Name	Company Name	Title	Contact Details
Shuji Aruga	Seiko Epson Corporation	President, Epson Imaging Devices Deputy COO, Imaging and Information Operations Division; Senior General Manager, Imaging and Information Planning and Design General Control	
Koichi Endo	Seiko Epson Corporation		

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	7-4

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)	

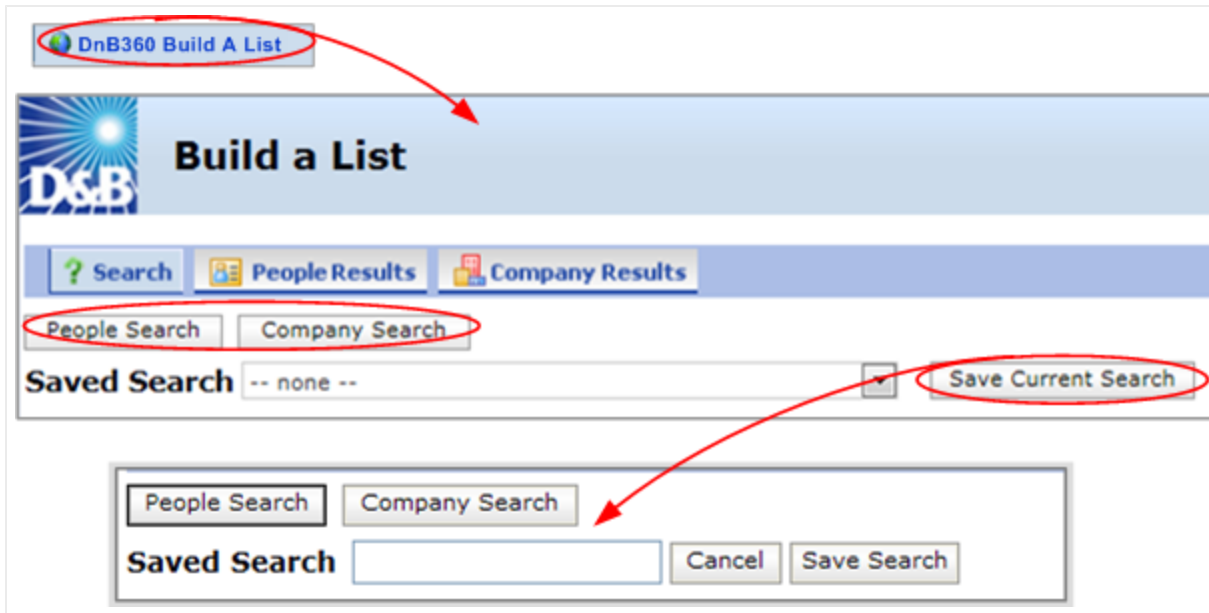
Note: For some categories you can select more than one choice. For data fields such as US SIC Codes (type code), use a comma to separate multiple choices.

Saving Searches

1. To display the **D&B Build A List** window, click **D&B Build A List**.
2. Enter the criteria for your search.
3. Click **Search**.
4. To create a field for the saved search, click **Save Current Search**.
5. Enter a name for the search that identifies the search objective.
6. Click **Save Search**.

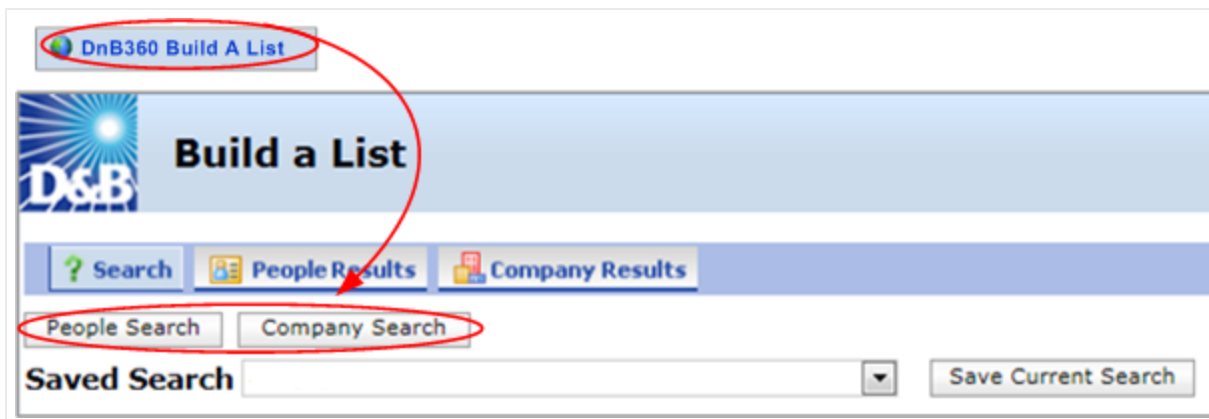
Your search is now saved, and you can use it again at a later time.

If you logged 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. Click **D&B Build A List**.
2. To display all of your saved searches, use the drop-down menu.
3. Click to select saved search. The search criteria changes.
4. Click the appropriate search button.





Index

A

accounts

company overview window 3-1

icons used in windows 3-1

merging 5-7

accounts, creating

based on account attributes 3-5

based on competitors 3-9

based on list of criteria 3-4

from existing account records 3-7

from family tree accounts 3-7

using name and address 3-2

accounts, enriching

adding D&B data 4-2

adding financial information 4-9

adding industry information 4-5

identifying related accounts 4-4

B

biographies of contacts 5-2

build-a-list

using when saving searches 7-3

C

company results, exporting to a spreadsheet program 3-1

contacts

icons used in windows 5-1

number of records message 5-1

person biographies 5-2

contacts, adding

directly from D&B360 5-4

from account records 5-3

using build-a-list 5-6

credit consumption rules 1-4

criteria categories 7-2

D

D&B360

introduction 1-1

packages 1-2

product benefits 1-1

D&B360 window 2-1

E

Excel spreadsheet, exporting results to 3-1

I

icons 2-5

L

leads, creating

- based on attributes of specific account 6-5

- based on list of criteria 6-4

- from competitors 6-6

- from contacts 6-1

- from existing account attributes 6-2

- manually 6-3

log in 2-1

P

password 2-1

premium people, definition 1-3

R

rest of world 2-2

rules for credit consumption 1-4

S

searches

- process 7-1

- saving 7-3

- using 7-4

setting alerts 2-2

spreadsheets, exporting results to 3-1

T

tiers, D&B360 features 1-2

trial customers, rules for credit consumption 1-4

U

user name 2-1

W

windows

- D&B360 2-1



Dun & Bradstreet (D&B)
103 JFK Parkway
Short Hills, NJ 07078

www.dnb.com