D&B360

User Guide

for Oracle CRM

Version 2.2

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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**.

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Related Documentation

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

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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.

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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.

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

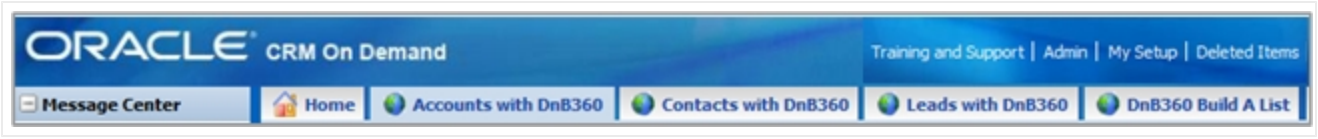
See New Opportunities	Seeing your customers and prospects in a new way can uncover new information and new-sale entry points.
Accelerate Your Sales Cycle	Once you establish relevance and credibility, customers will trust you with their business.
Expand Your Customer Footprint	Build customer relationships on a foundation that is based on relevance, credibility, and trust.
Position Your Success	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. 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.

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.Guide Organization

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	• 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. For example: • 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	The contact credit limit represents the combined number of premium and non-premium D&B people that customers can import. For example, a user with a trial credit limit of 25 could import: • 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.

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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	• 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. For example: • 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	The contact credit limit represents the combined number of premium and non-premium D&B people that customers can import. For example, a user with a trial credit limit of 25 could import: • 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.

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2 Getting Started with D&B360

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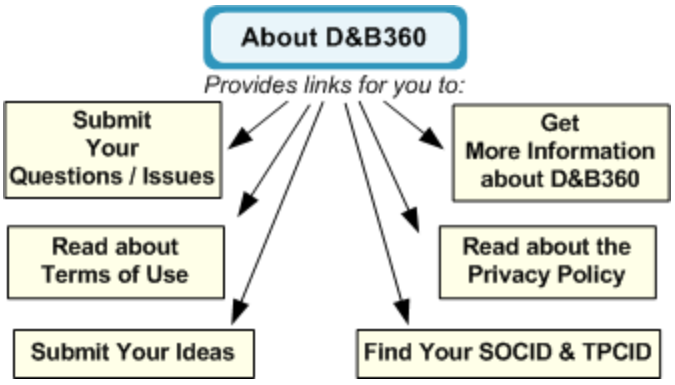
About D&B360

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.

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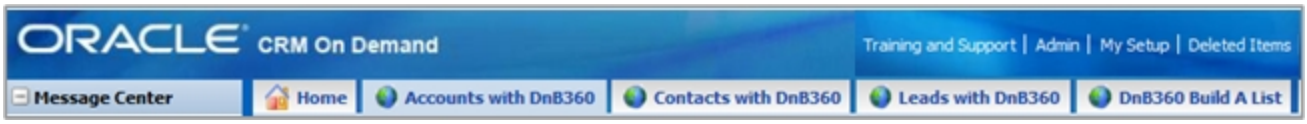
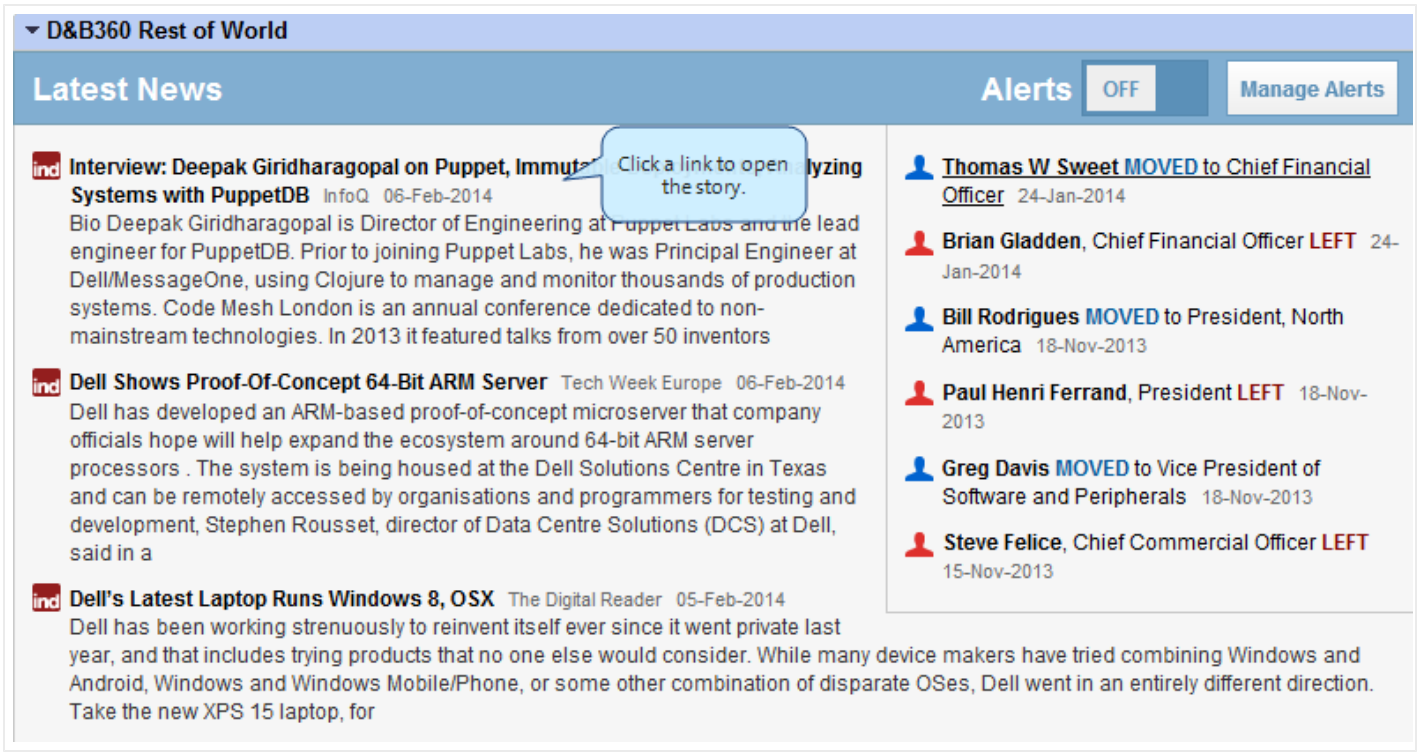
Note: These additional D&B360 tabs now display within your ORACLE CRM instance: Accounts with D&B360, Contacts with D&B360, Leads with D&B360, and D&B360 Build A List.



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.



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.

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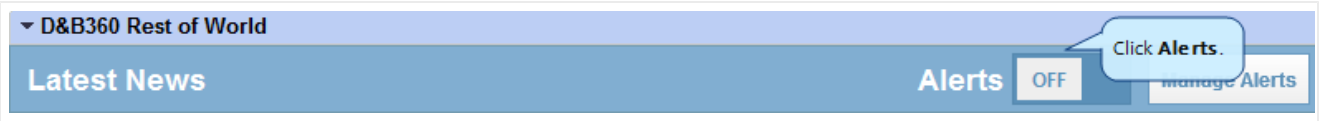
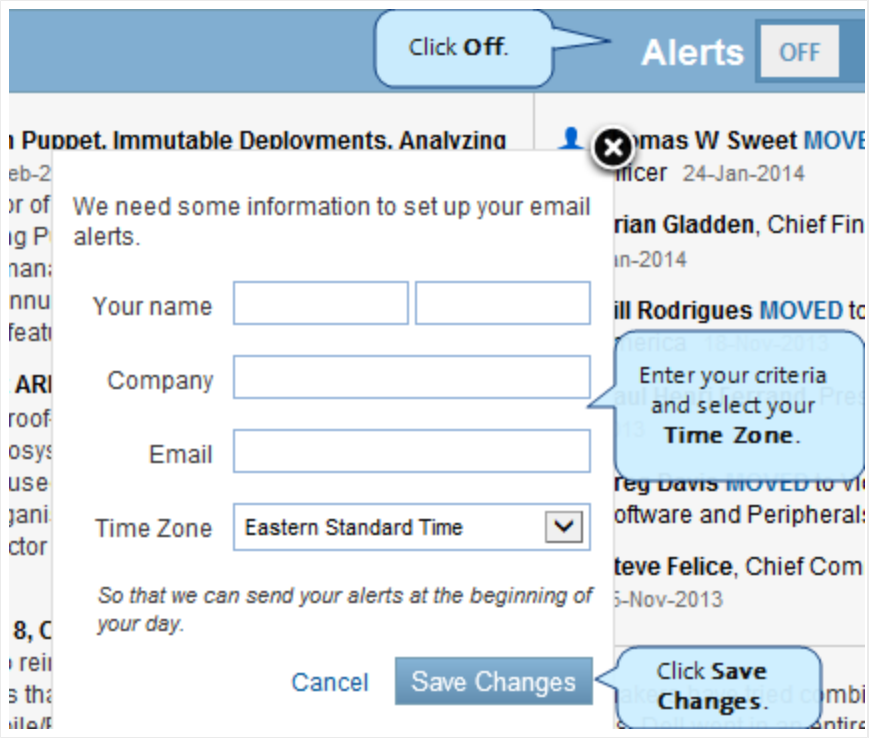
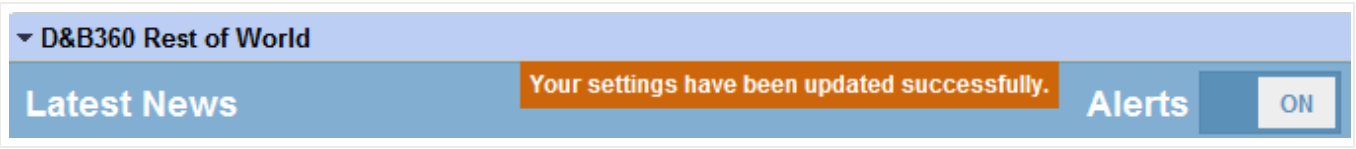


3. In the window that opens, type or enter your information in the fields that display and select your **Time Zone**.
4. Click **Save Changes**.

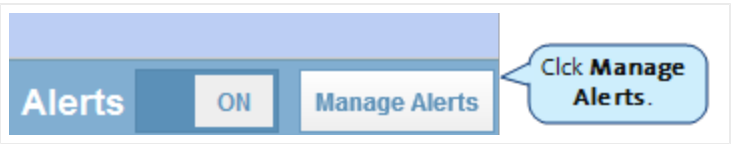


A message displays that your settings were updated, and the **Alerts** button changes to **ON**.



Managing Alerts and Triggers

1. On the **D&B360 Rest of World** area, click **Manage Alerts**.

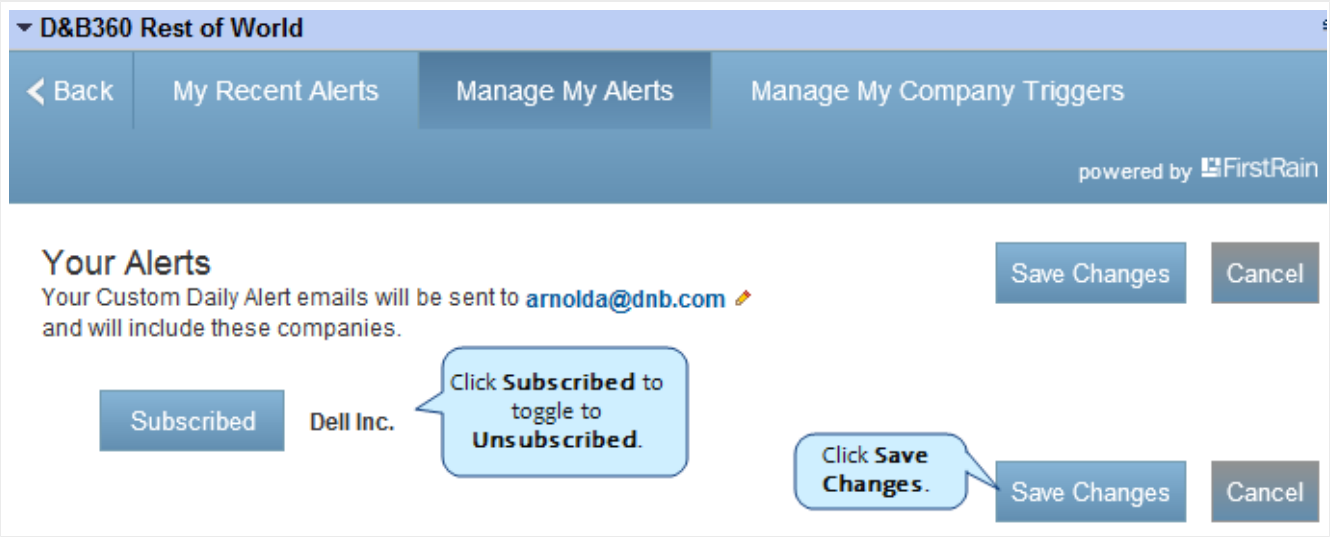


2. Click the **Manage My Alerts** tab to display **Your Alerts**.

3. Next to a company name whose news you have subscribed to, click **Subscribed** to toggle to **Unsubscribed**.

   – or –

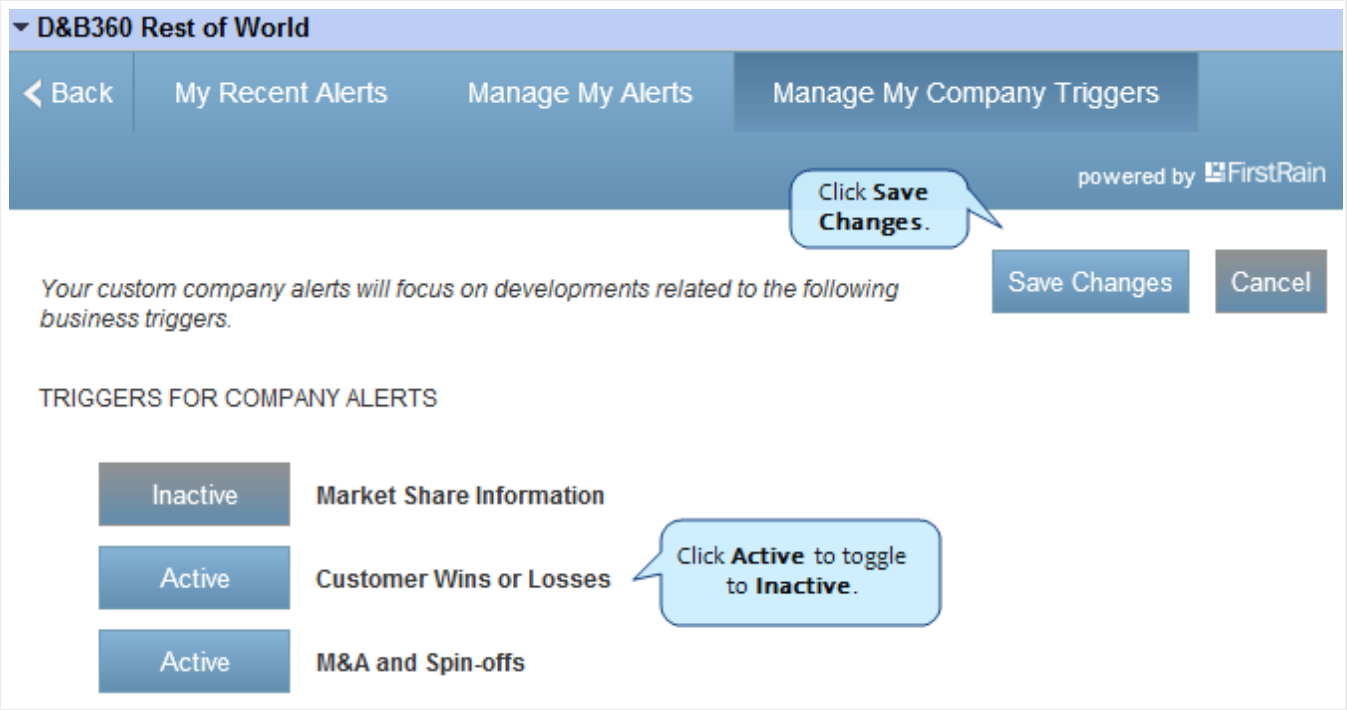
   Click **Unubscribed** to toggle to **Subscribed**



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**.



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.

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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.

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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

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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.

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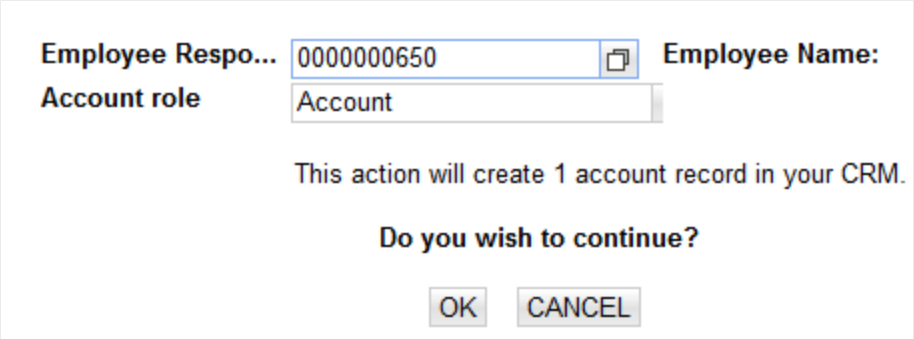
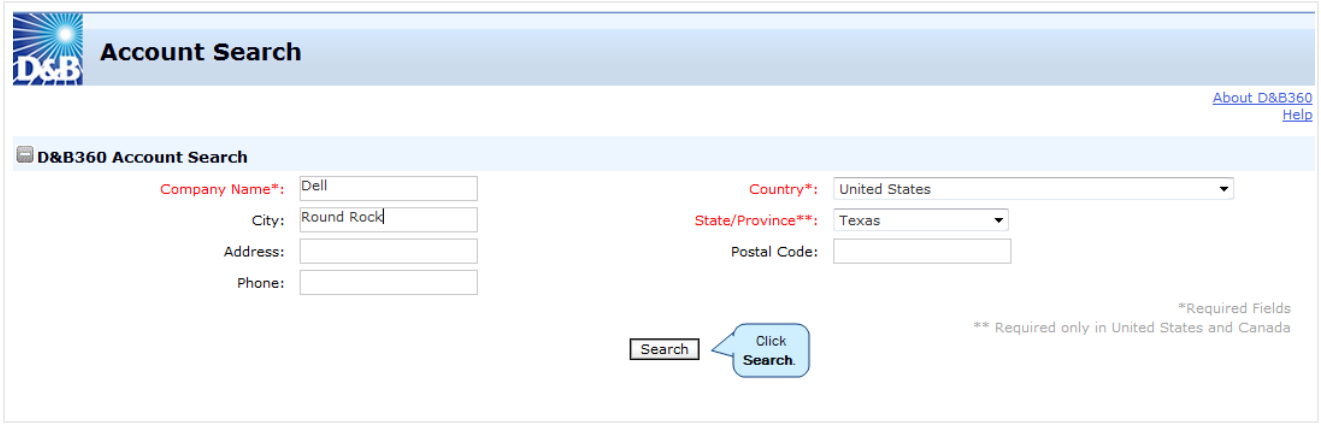
After you create or add a new account, the **Confirmation Message to Create Accounts** window will open. Click **OK** to add this account, or click **Cancel** if you do not want to add this record to your CRM.



Creating a New Account Using Name and Address

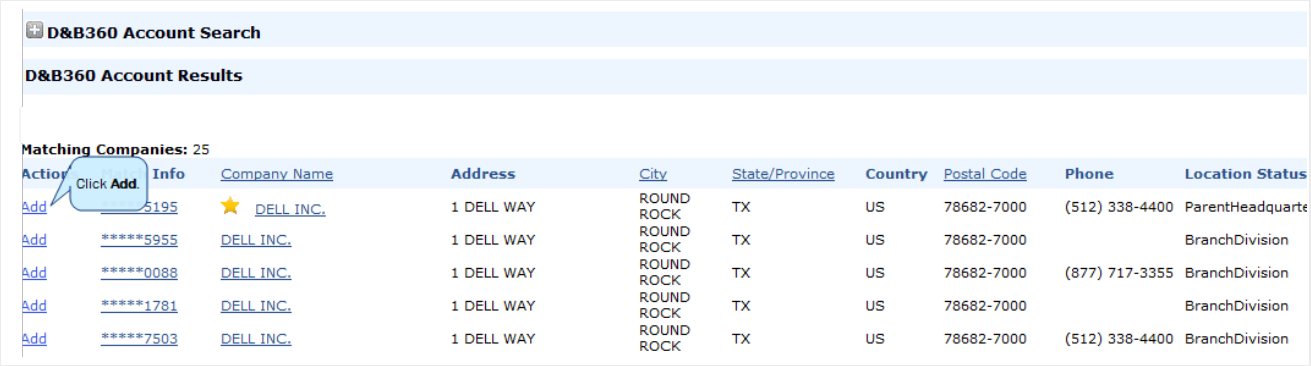
You can run a search using a name and address, then create an account based on the search results.

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.**



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

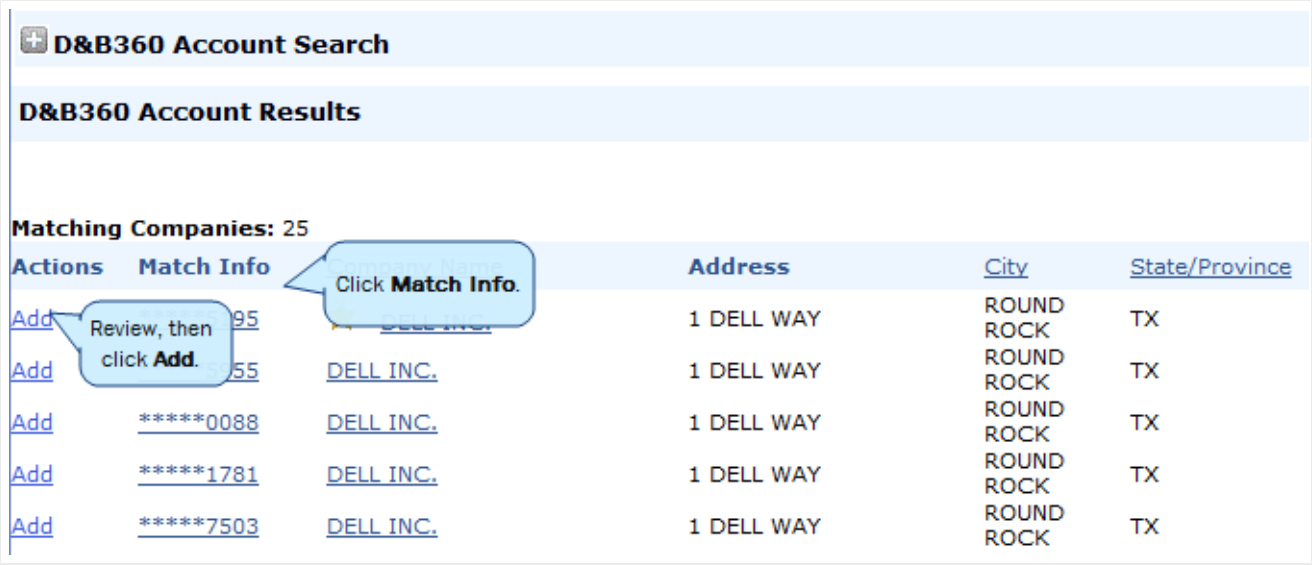
> **Note:** To review the match information before you make a decision, do not click Add. Instead, see the steps that follow.



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**.



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

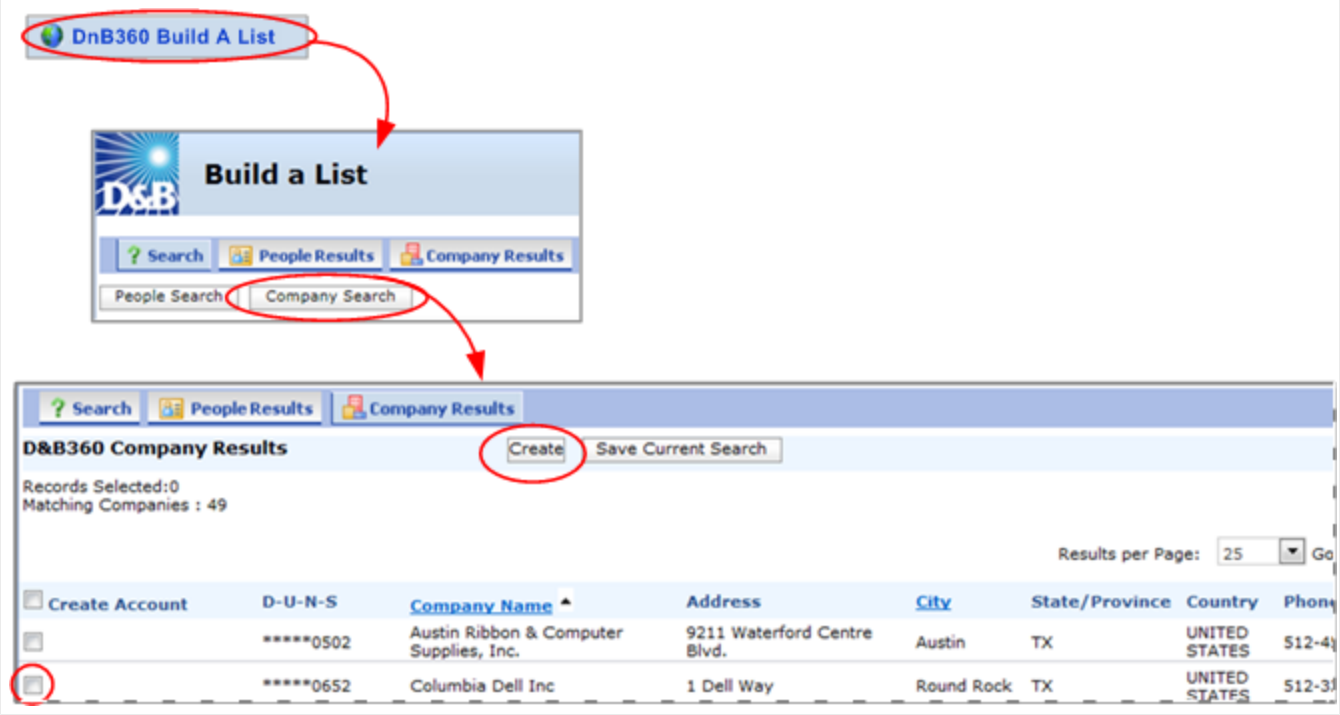
You can create an account by building a list of all available options, which you locate by specifying a set of unique criteria.

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.



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

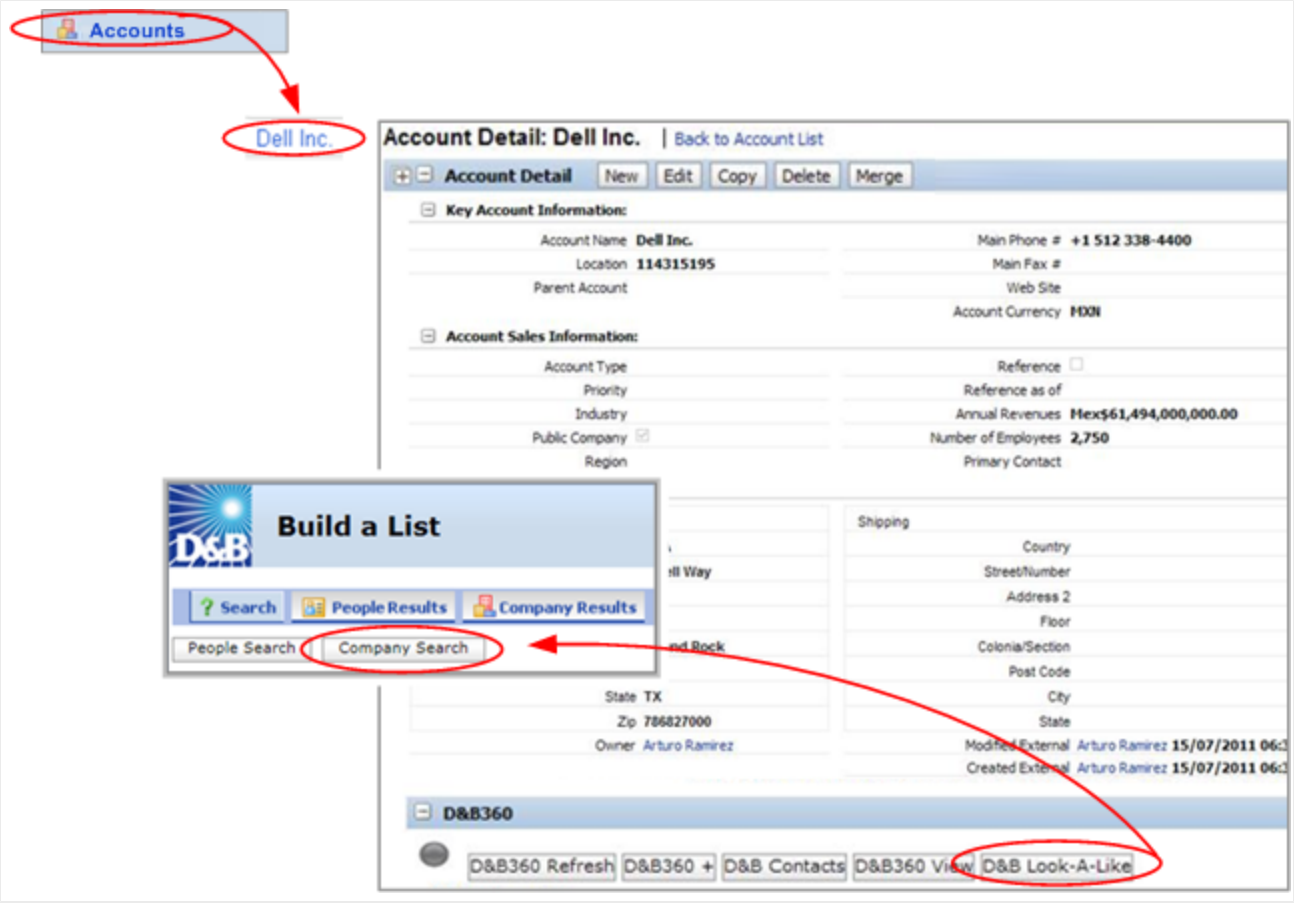
Creating a D&B360 Account Based on Attributes of a Specific Account

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**.

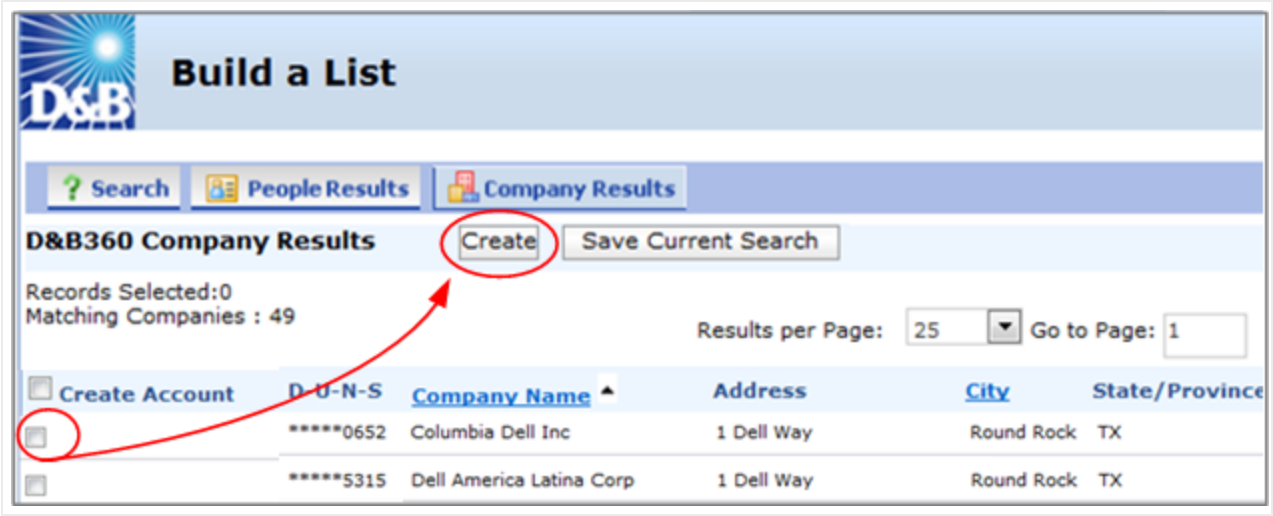
4. In the **Build a List** window, click **Company Search**.

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.

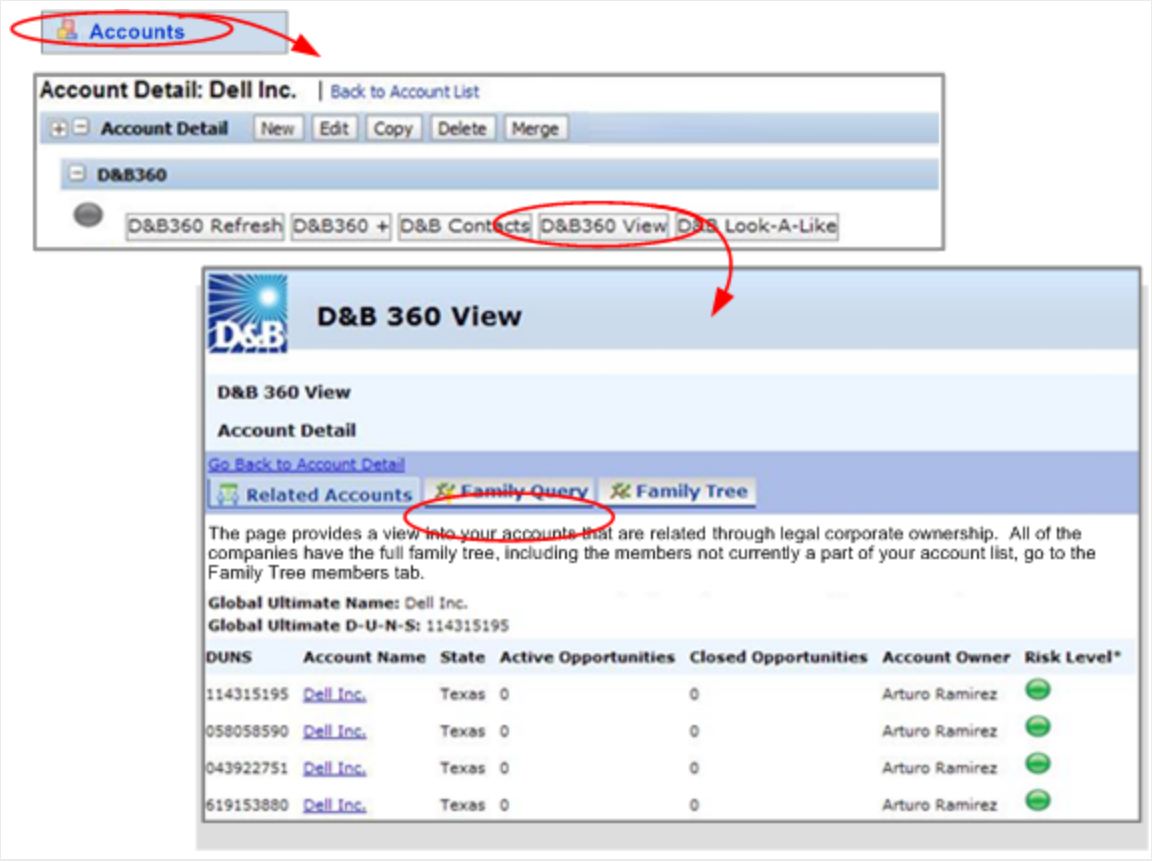


Creating a D&B360 Account from Records Related to Existing Accounts

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.



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.

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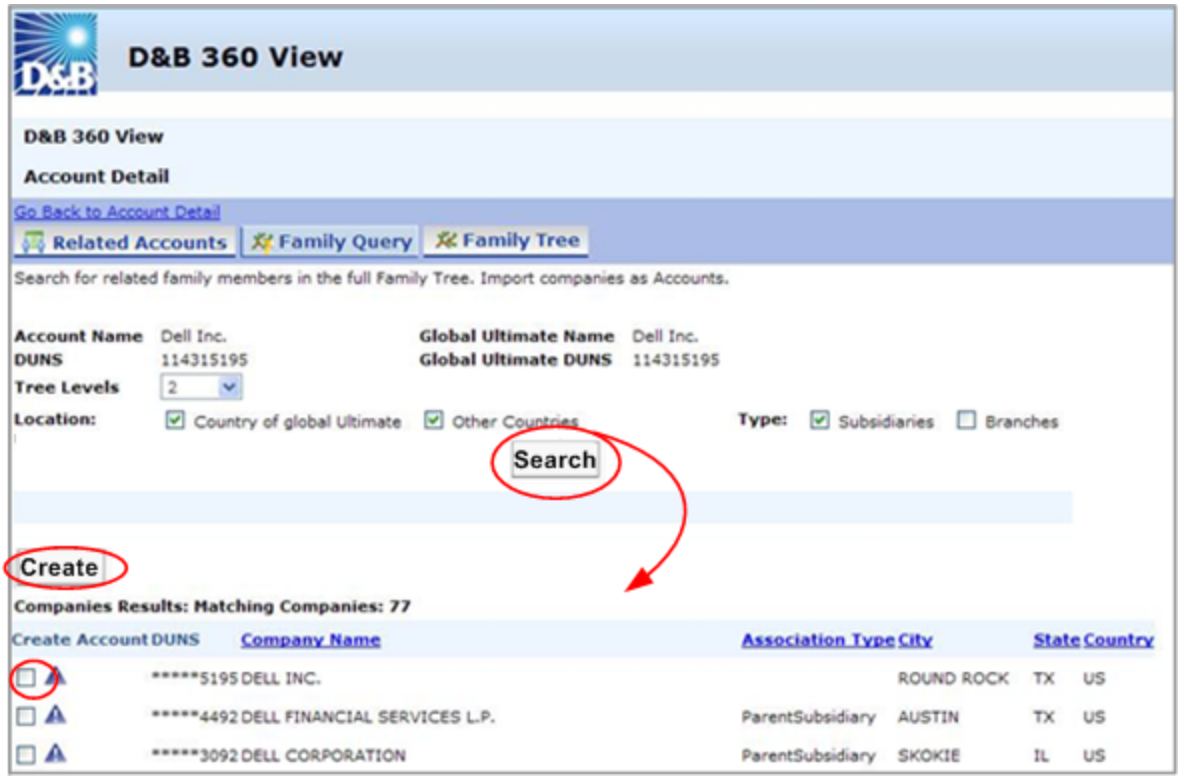
Note: You can also filter on Subsidiaries only or add in Branch records and choose how many levels of the tree you want to receive from the Global Ultimate.

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.



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.

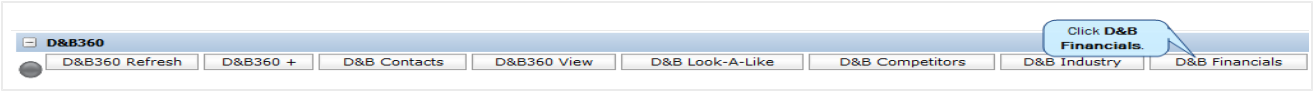
1. Complete these steps to search by Family Tree Hierarchy:
2. Make sure you have selected the filtering criteria that you want to filter on.
3. Click **Search**.
4. To identify the accounts that you want to create, click the corresponding check boxes.

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

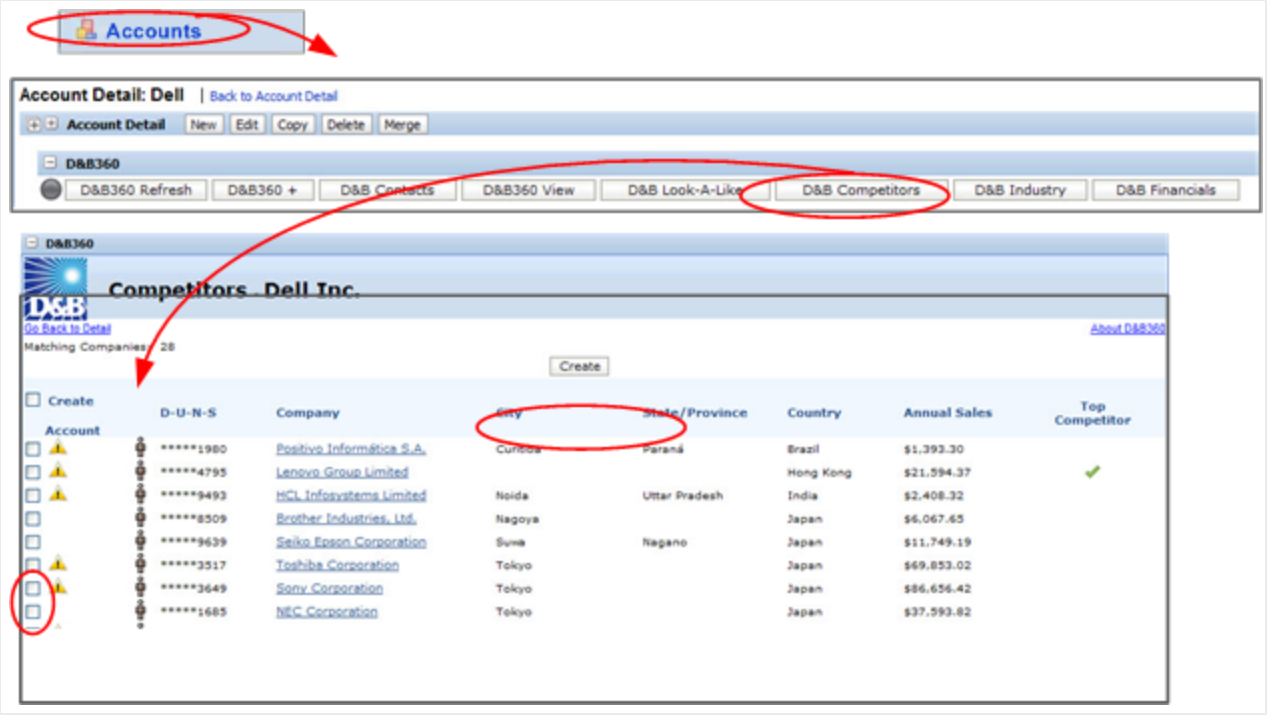
Creating a D&B360 Account from Competitors

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**.


Accounts
Account Detail: Dell | Back to Account Detail
Account Detail New Edit Copy Delete Merge
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
D&B360
Competitors - Dell Inc.
Go Back to Detail
About D&B360
Matching Companies: 28
Create
Create Account
D-U-N-S
Company
City
State/Province
Country
Annual Sales
Top Competitor
*****1980 Positivo Informática S.A. Curitiba Paraná Brazil $1,393.30
*****4795 Lenovo Group Limited Hong Kong $21,594.37
*****9493 HCL Infosystems Limited Noida Uttar Pradesh India $2,408.32
*****8509 Brother Industries, Ltd. Nagoya Japan $6,067.65
*****9639 Seiko Epson Corporation Suwa Nagano Japan $11,749.19
*****3517 Toshiba Corporation Tokyo Japan $69,853.02
*****3649 Sony Corporation Tokyo Japan $86,656.42
*****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.

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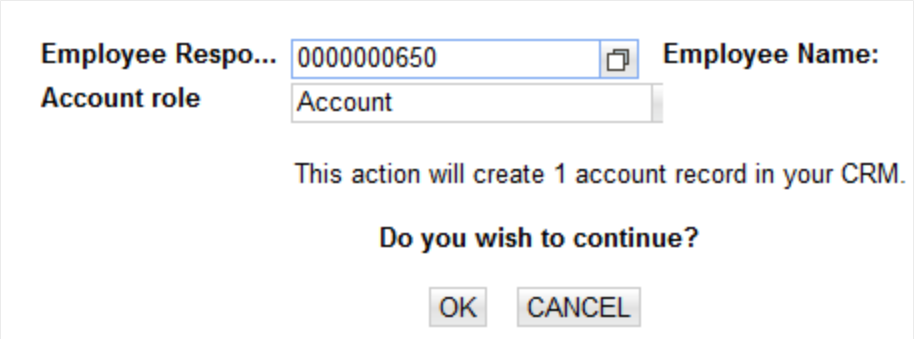
After you create or add a new account, the **Confirmation Message to Create Accounts** window will open. Click **OK** to add this account, or click **Cancel** if you do not want to add this record to your CRM.



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**.

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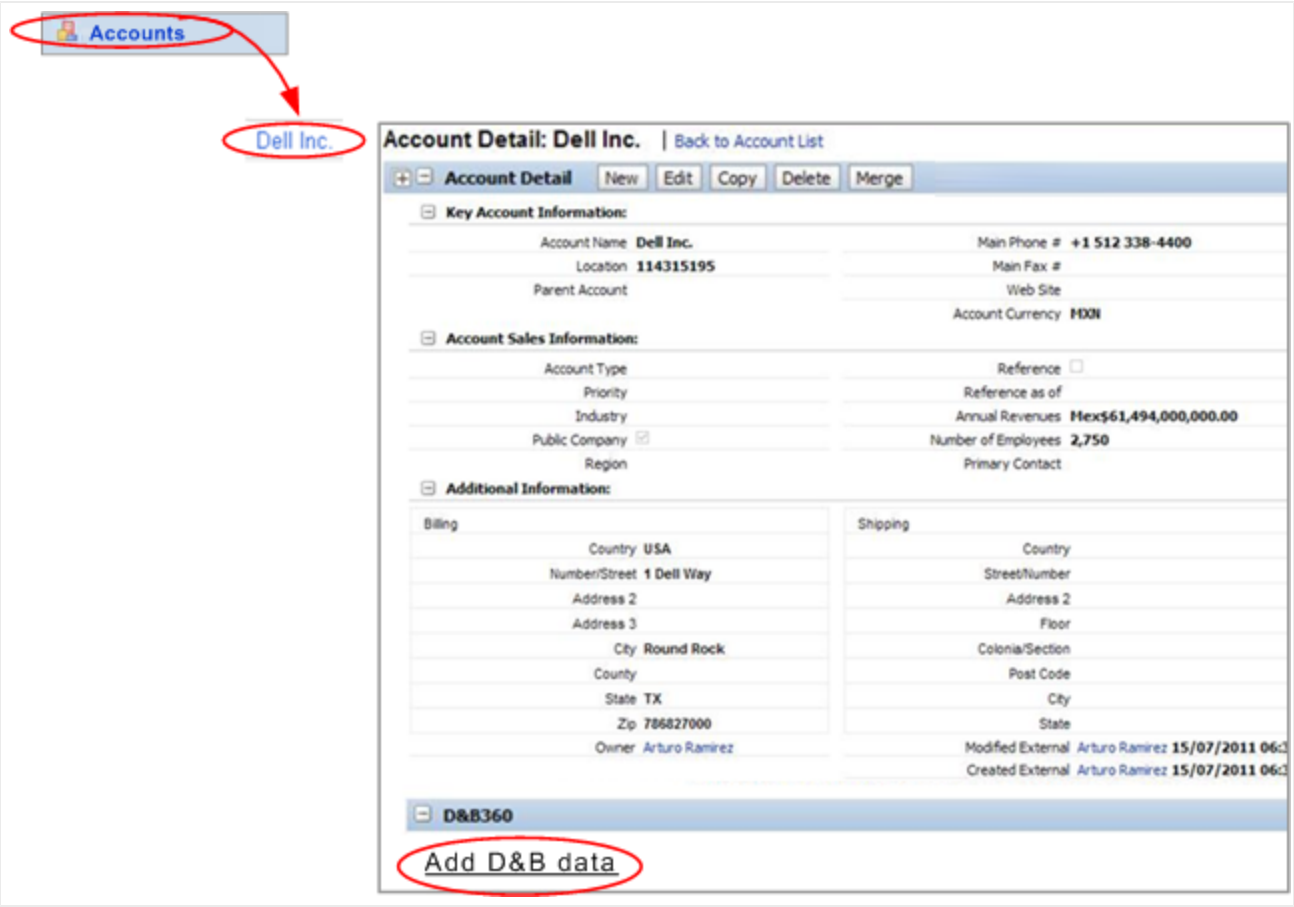

5. In **D&B360 Account Results** window, locate the account you want to use, and click **Select**.
6. After you identify which data you want to use to update the account, select any data you do not want to include to clear it.
7. To update your account with the selected D&B data, click **Update**.

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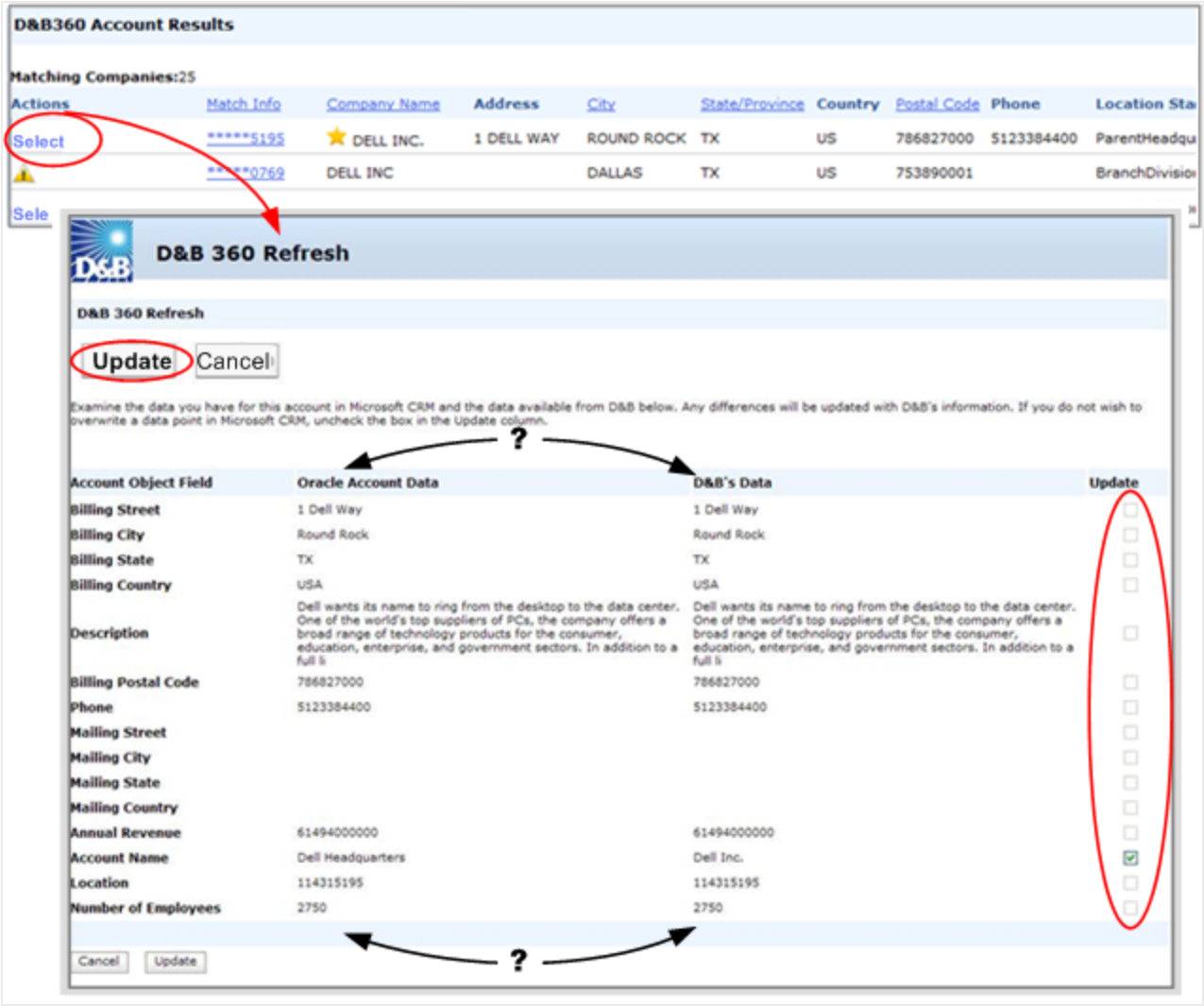

Identifying Related Accounts in D&B360

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

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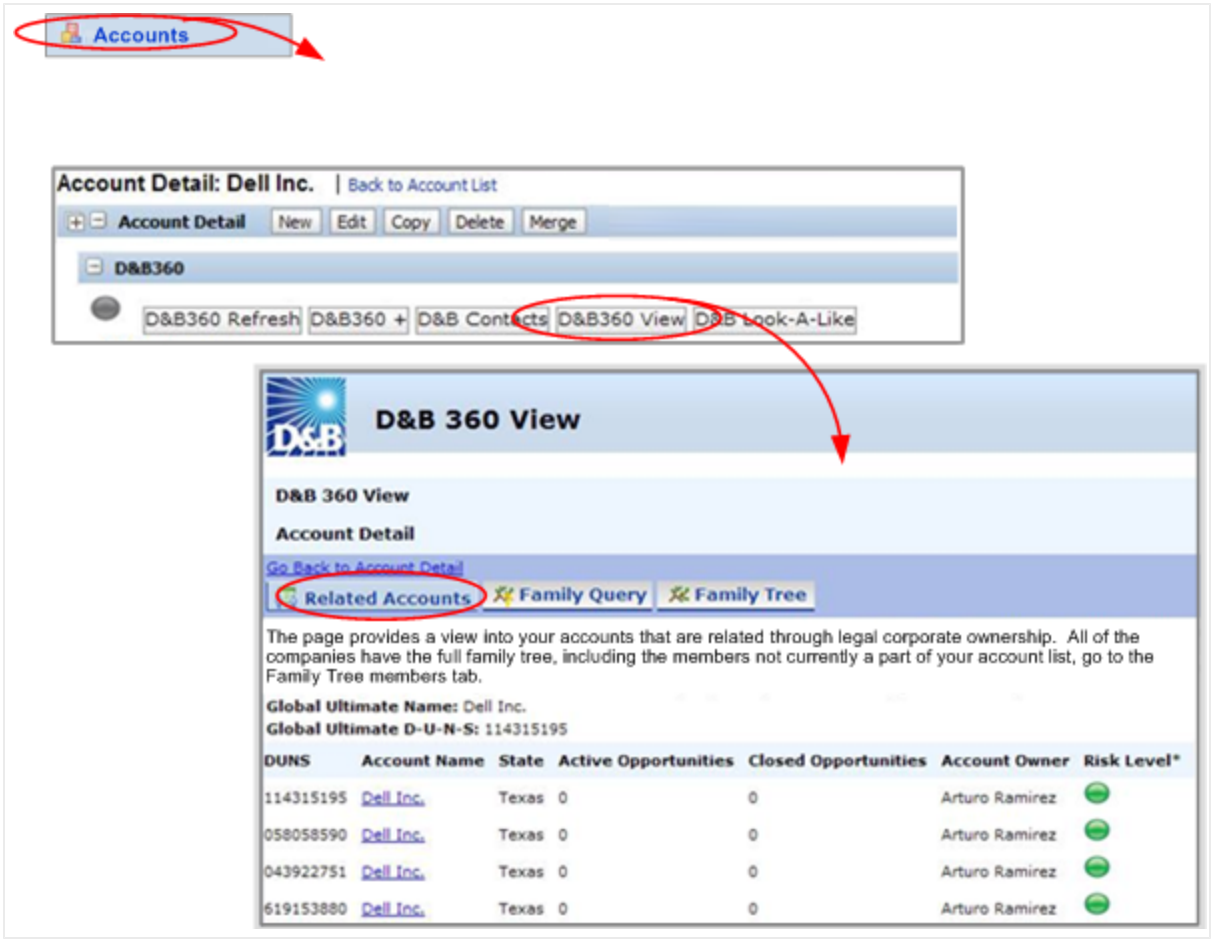
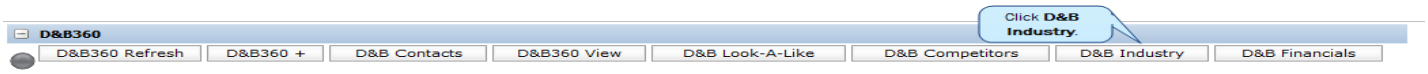


Displaying and Adding Industry Information about Existing Accounts

Industry Information powered by First Research is 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**.

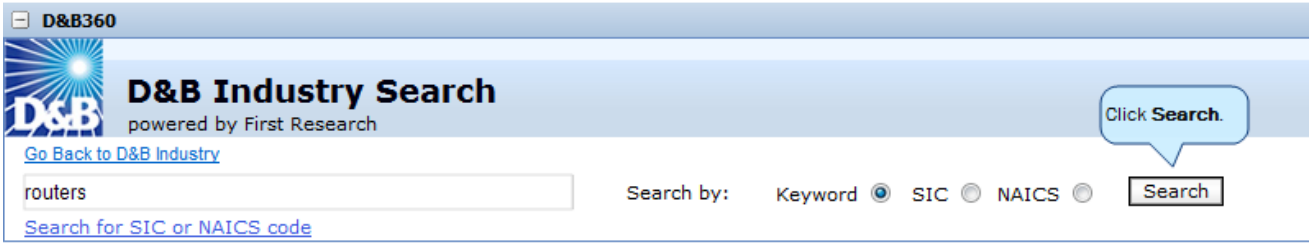


The **D&B Industry** window for the account you selected opens and displays a list of that account's related industries. If you don't see a related industry you believe should be included, you can add it (see "Adding an Industry to an Existing Account" on page 4-6). For more details about how to use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

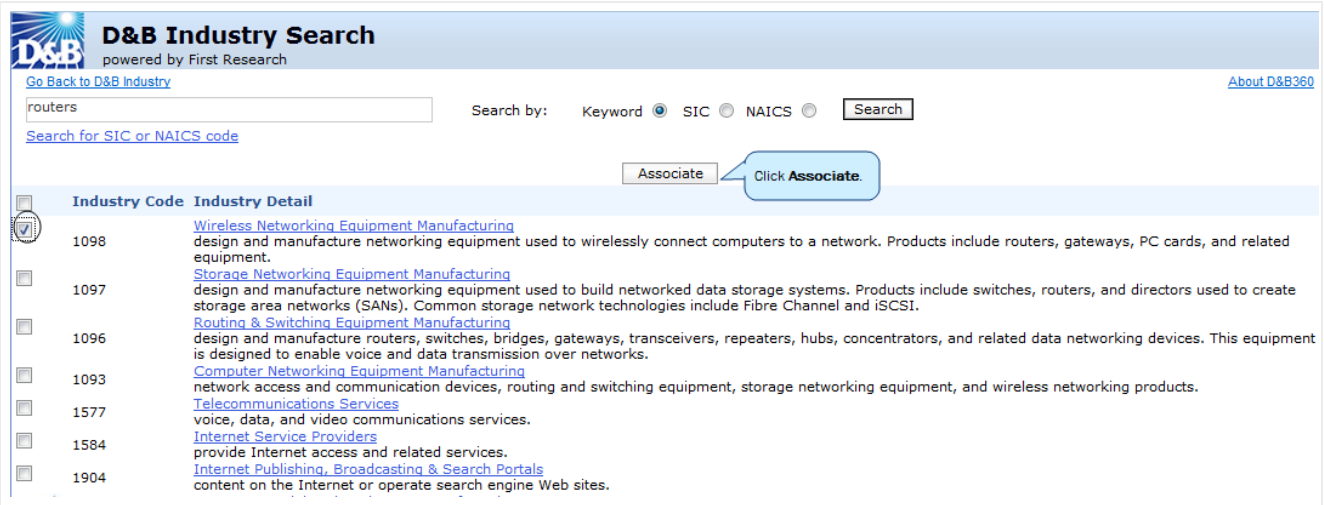
Adding an Industry to an Existing Account

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**.



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

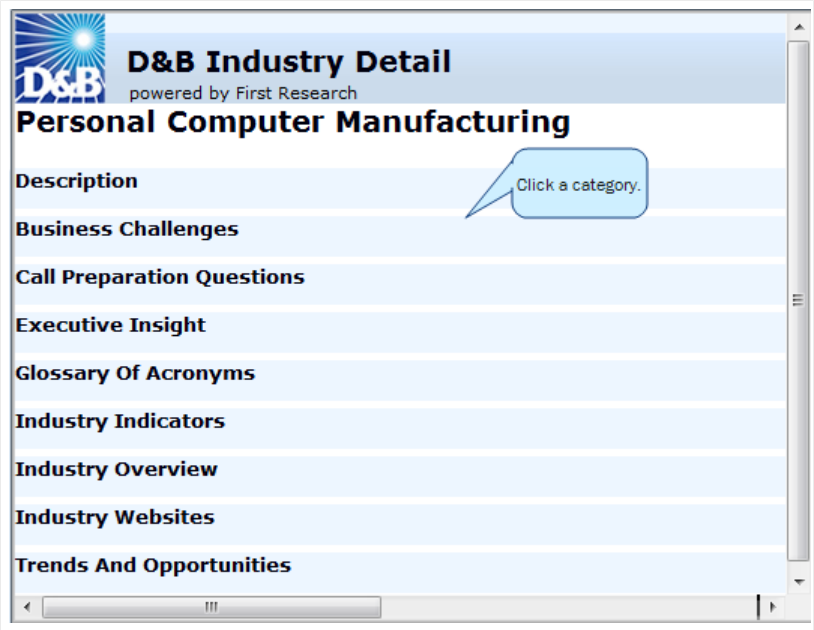
D&B Industry Information from First Research provides Sales and Marketing users with deeper insight about industry drivers and how these might affect a company. The information available includes:

- 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.

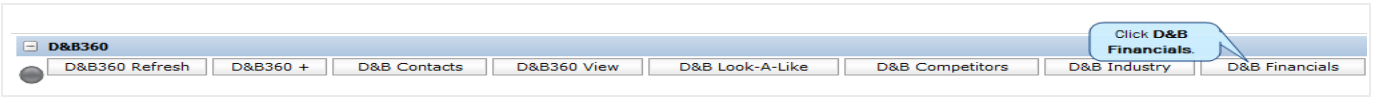
2. In the **D&B Industry** window click a category, for example, **Industry Indicators**.



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.

Adding Financial Information to Existing Accounts

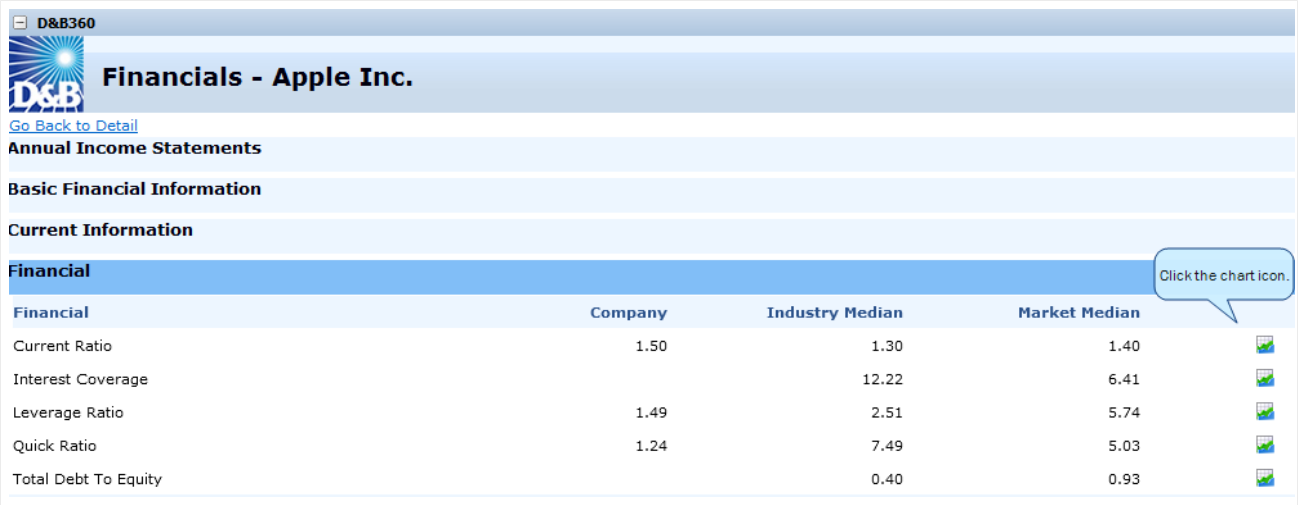
1. To list you existing accounts, click the **Account** tab.
2. Select an existing account.
3. In the **Account Detail** window, click **D&B Financials** to open the **D&B Financials** window for this account,



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

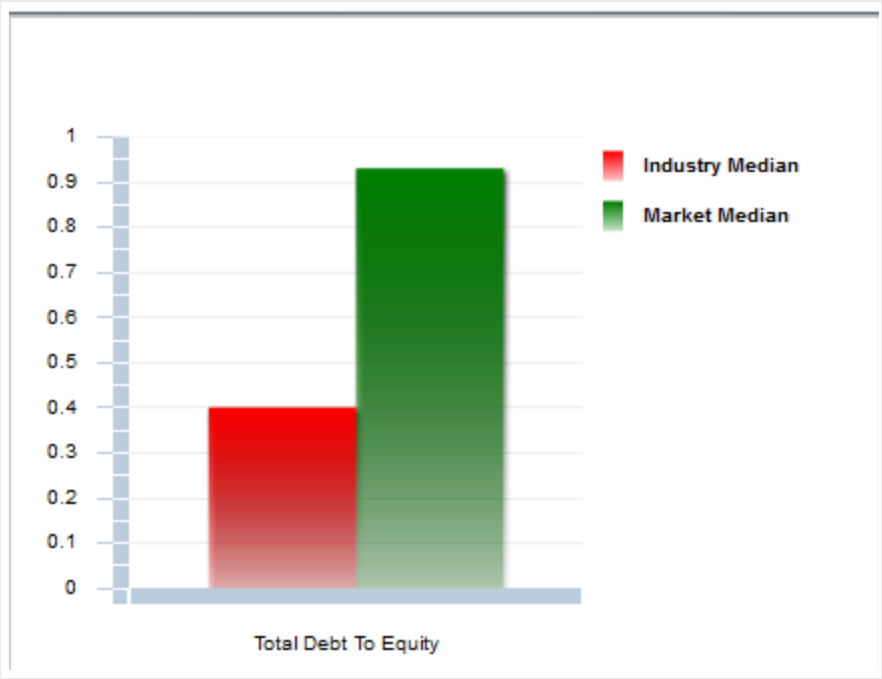
4. To drill farther down into the available information, double-click any of the categories.

5. To view the data visually on all but basic and current information, click the chart icon.



Financial	Company	Industry Median	Market Median
Current Ratio	1.50	1.30	1.40
Interest Coverage		12.22	6.41
Leverage Ratio	1.49	2.51	5.74
Quick Ratio	1.24	7.49	5.03
Total Debt To Equity		0.40	0.93

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



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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.

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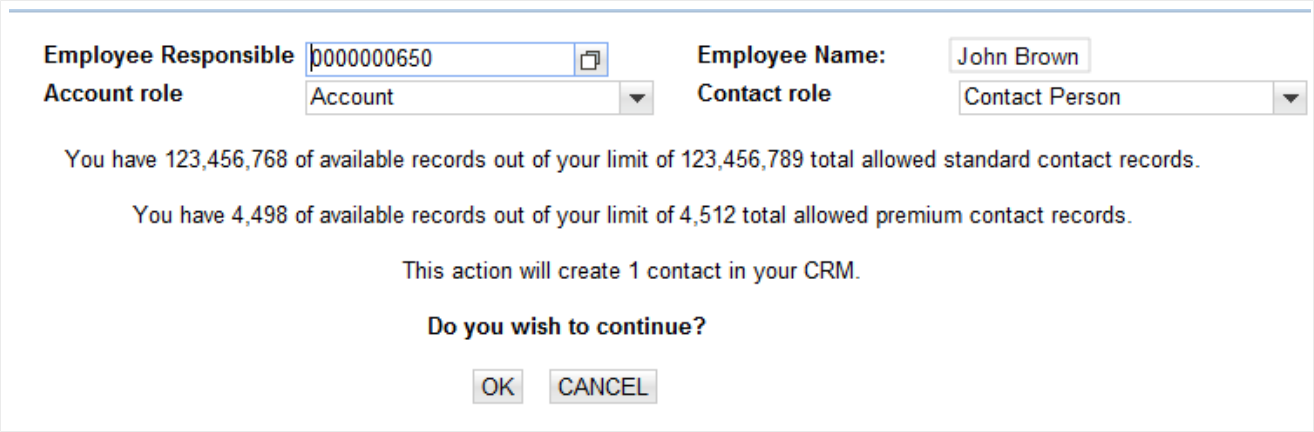
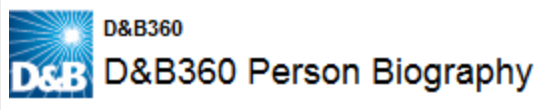
After you create or add a new contact, the **Confirmation Message to Create Contacts** window will open. Click **OK** to add this contact, or click **Cancel** if you do not want to add this record to your CRM.



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.

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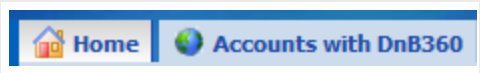
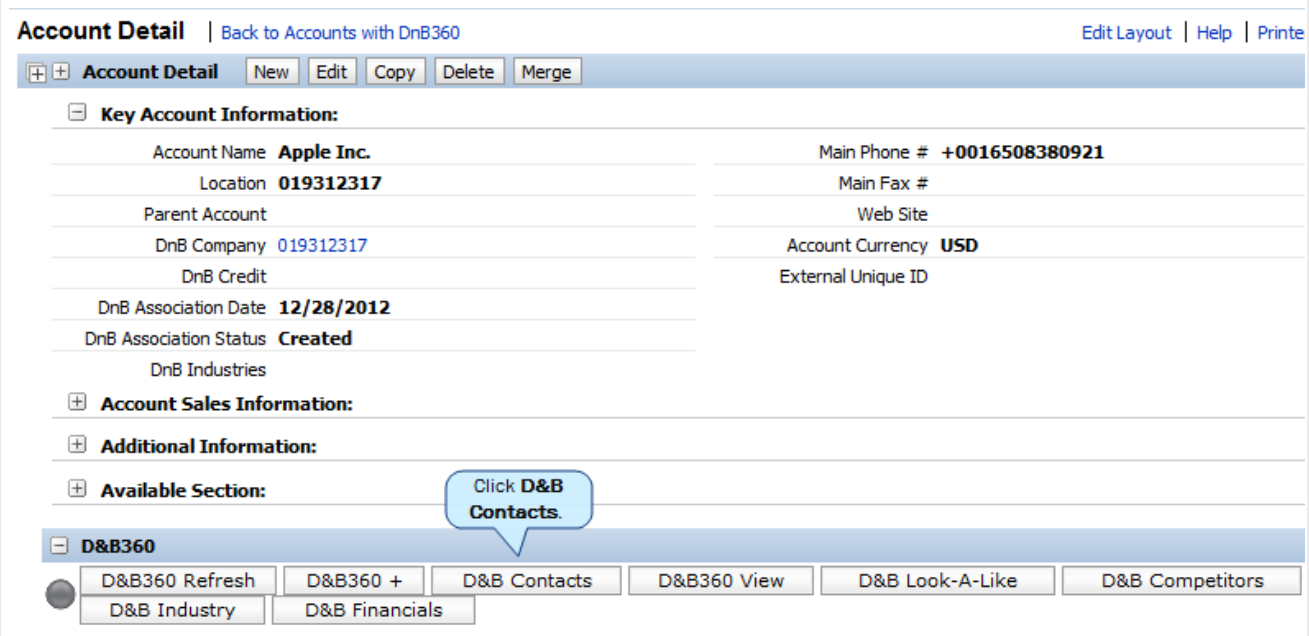
Adding a Contact from an Account Record

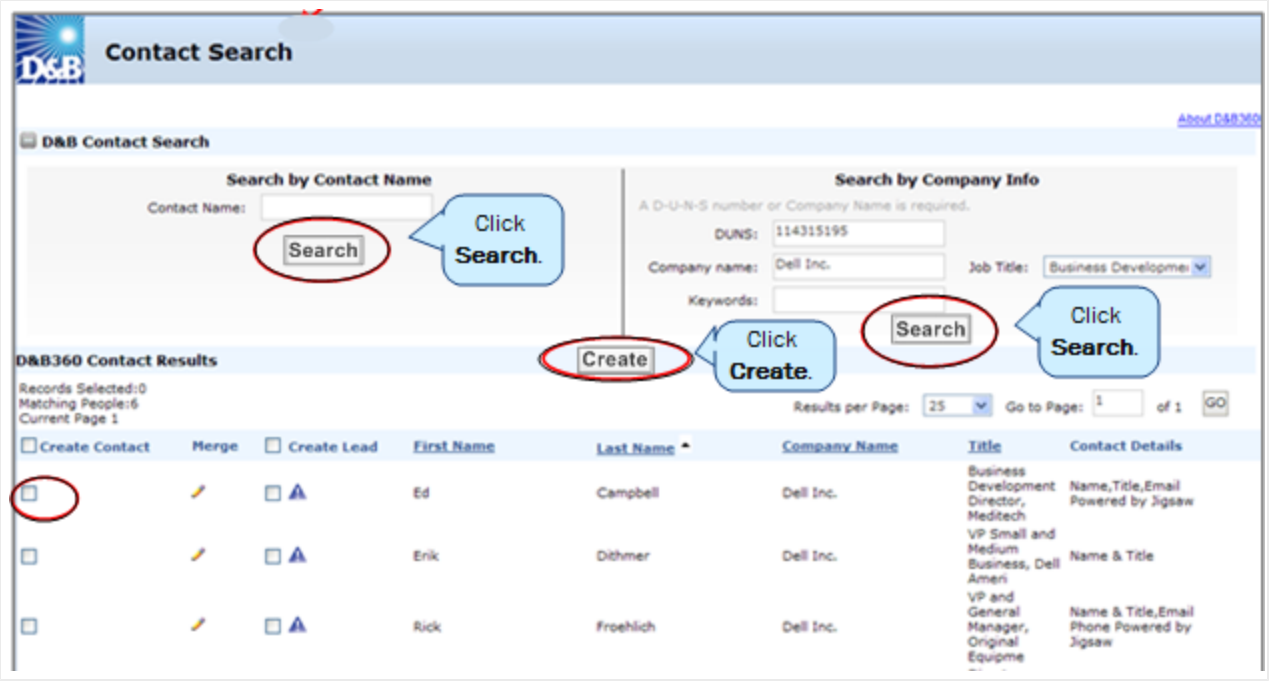
1. From the **D&B360** menu, click **Accounts with D&B360.**



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.



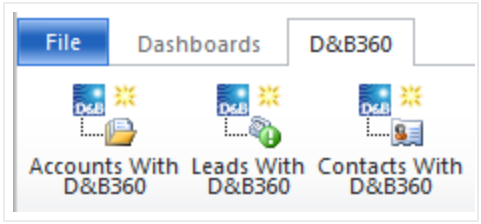
4. In the **Contact Search** window, **Search by Contact Name** area **Contact Name** field, type the name of the contact you are interested in.
5. Click **Search**.
6. Click to select contacts you want to add.
7. To add the selected contacts, click **Create**.



Adding a Contact from D&B360 Directly

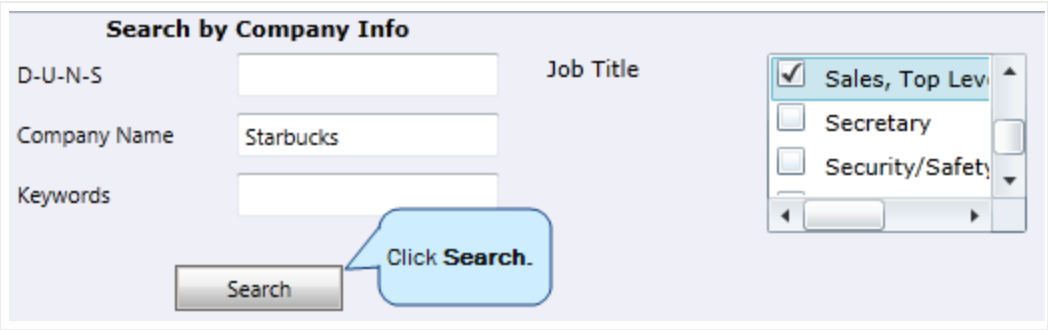
Option 1: To find contacts from a specific company, search by **Company Info**.

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

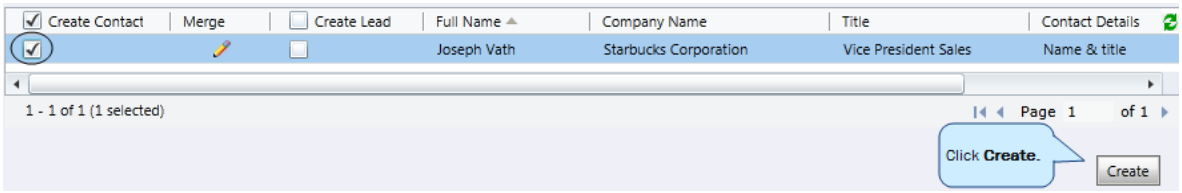


2. In the **Company Name** field, type the name of the company as the criteria for search, then click **Search**.

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

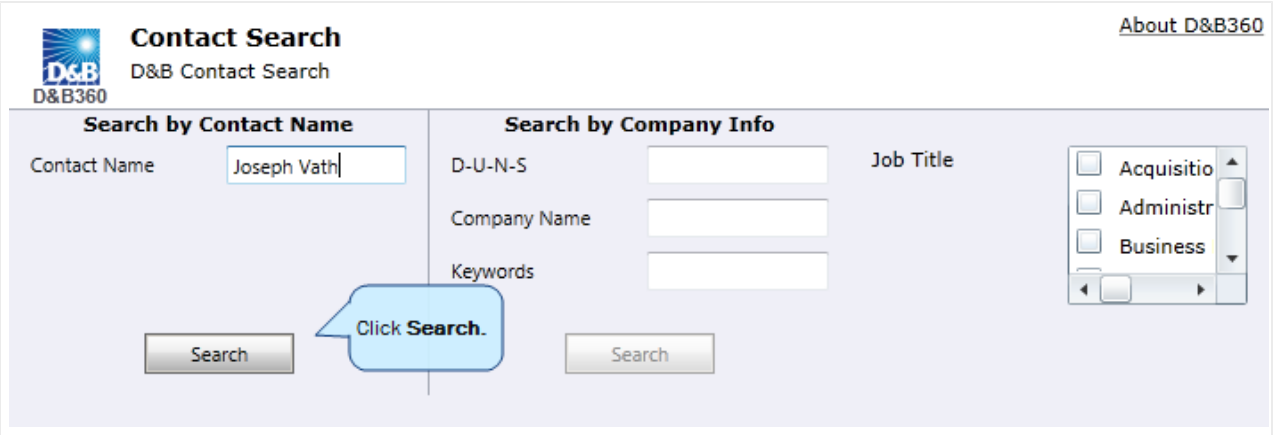


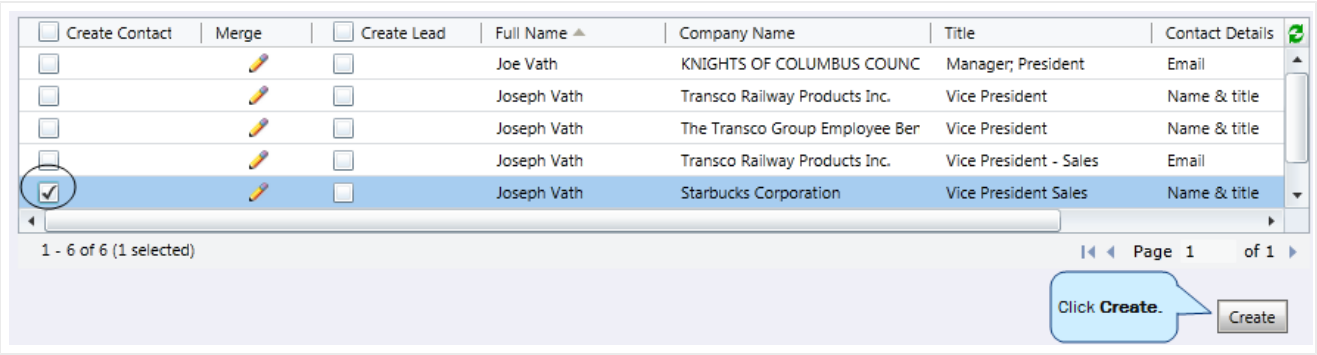
3. Next to the contact you want to add, in the **Create Contact** column, click to select the check box, then click **Create**.



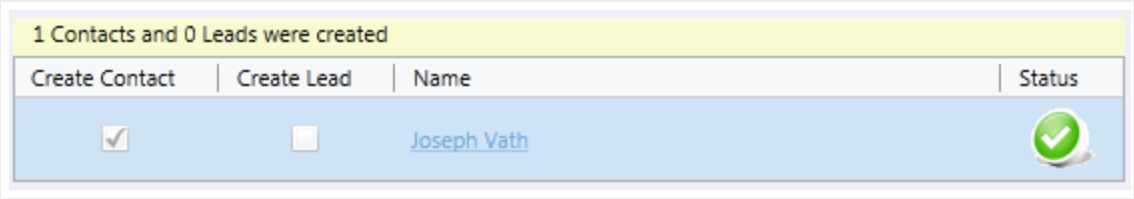
Option #2: To search for the name of an individual within a company, search by **Contact Name.**

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



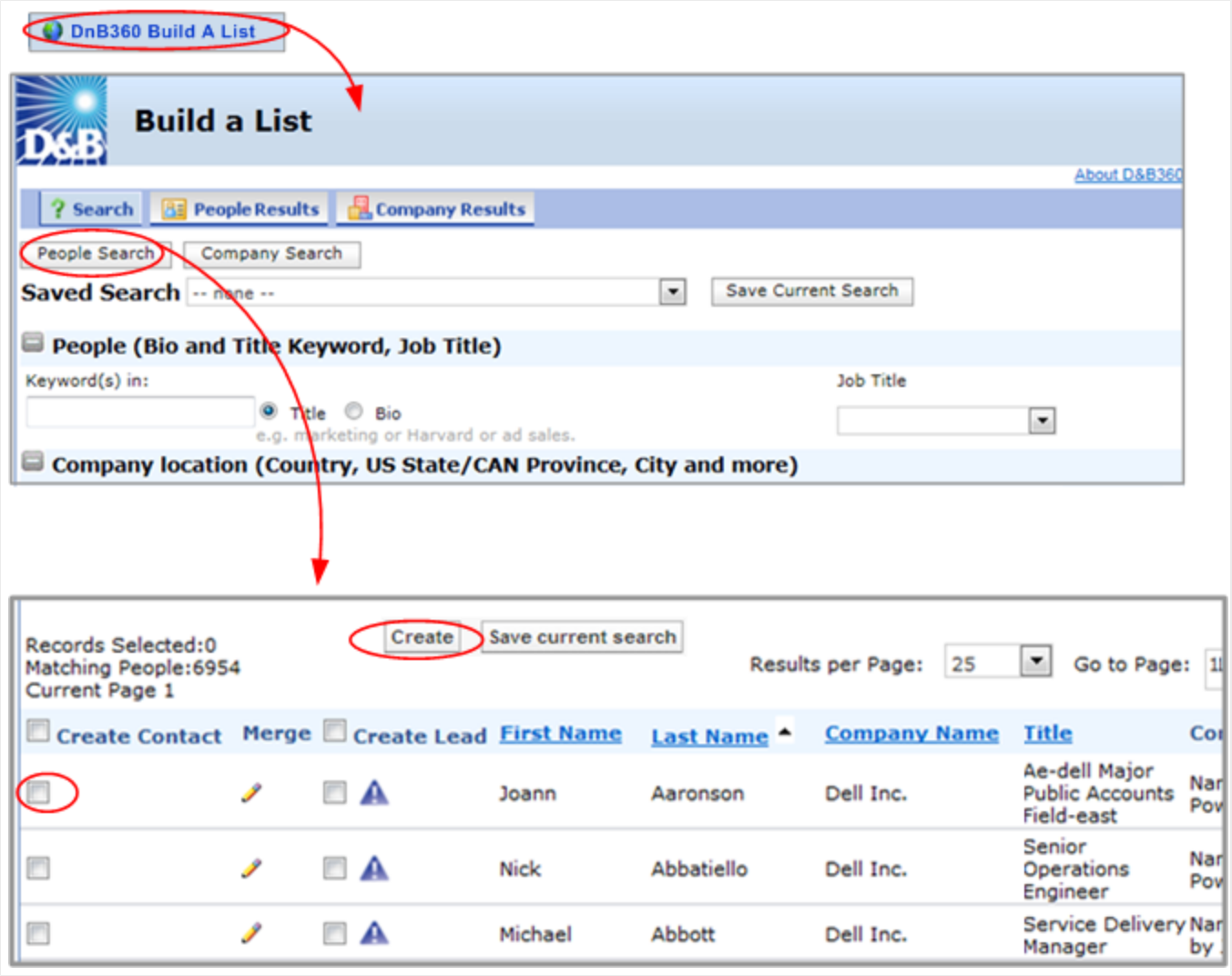


A green status icon displays to indicate that the contact was created.



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**.



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.

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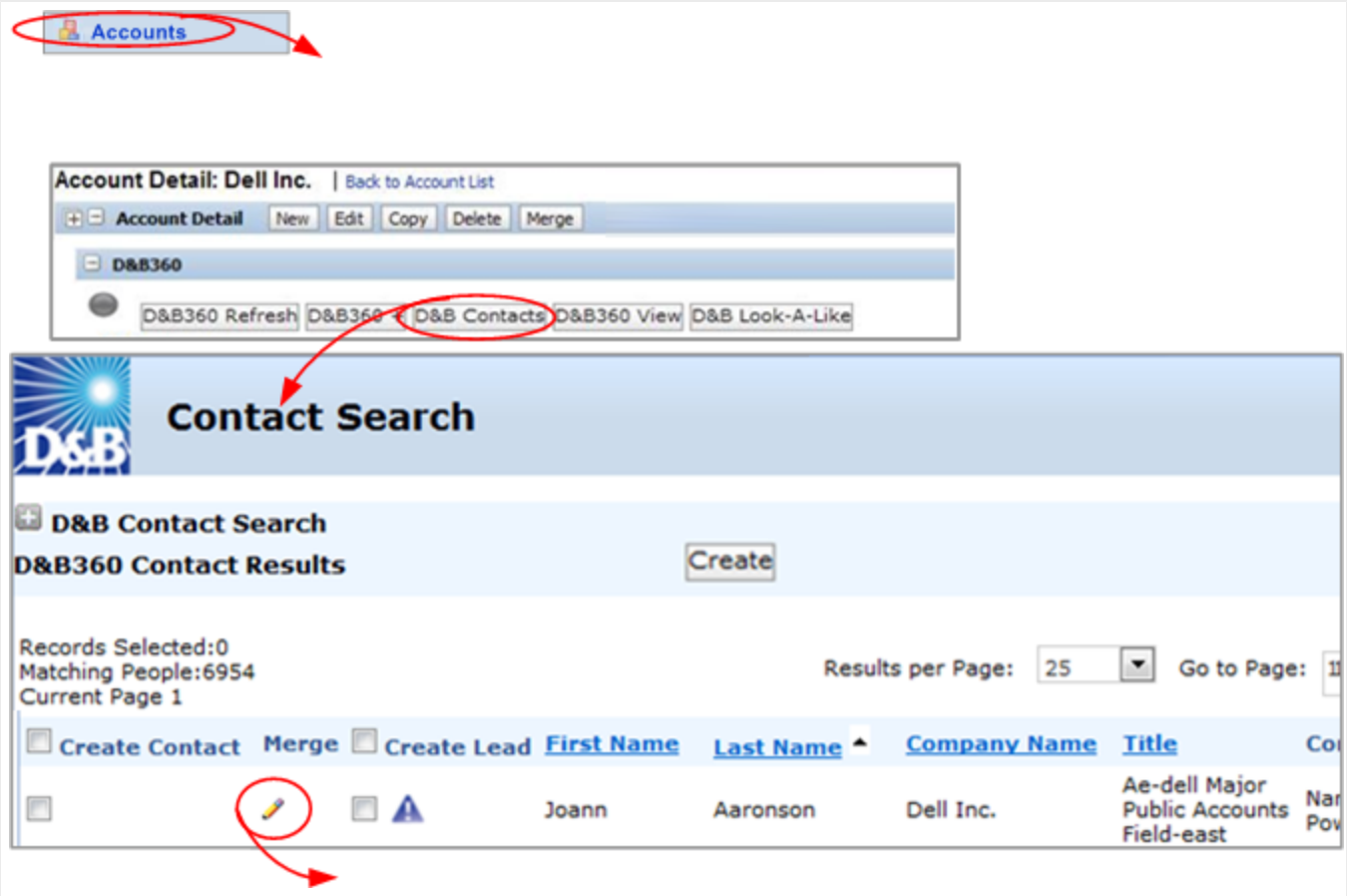
3. Click **D&B Contacts**. The results display in the **D&B Contact Search** window. The pencil icon indicates another account that is very similar to one that already exists. Consider whether to merge these accounts.
4. Next to the account you want to merge, click the pencil icon.



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.

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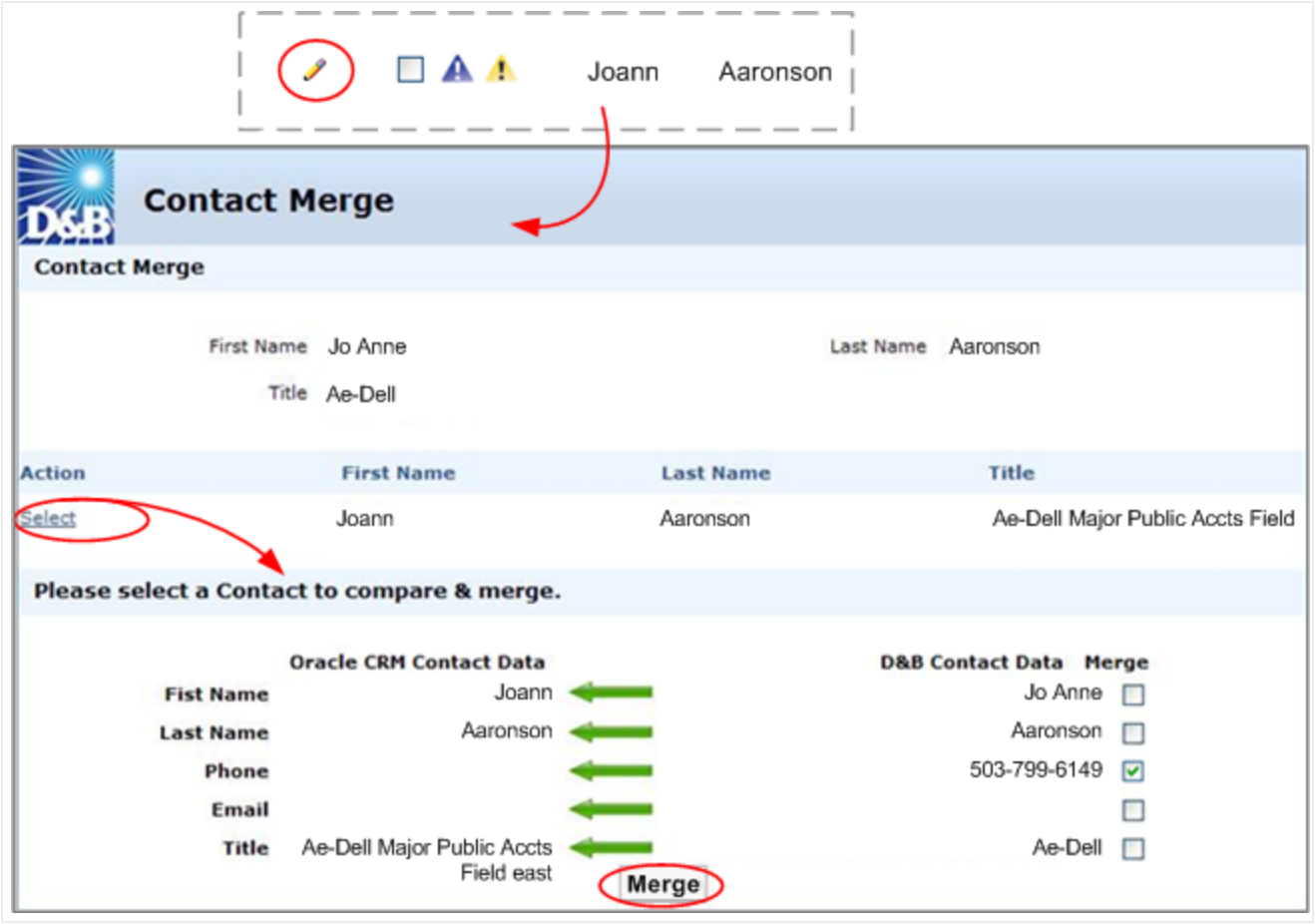
Joann
Aaronson
Contact Merge
Contact Merge
First Name Jo Anne
Last Name Aaronson
Title Ae-Dell
Action
First Name
Last Name
Title
Select
Joann
Aaronson
Ae-Dell Major Public Accts Field
Please select a Contact to compare & merge.
Oracle CRM Contact Data
D&B Contact Data
Merge
Fist Name
Joann
Jo Anne
Last Name
Aaronson
Aaronson
Phone
503-799-6149
Email
Title
Ae-Dell Major Public Accts Field east
Ae-Dell
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**.

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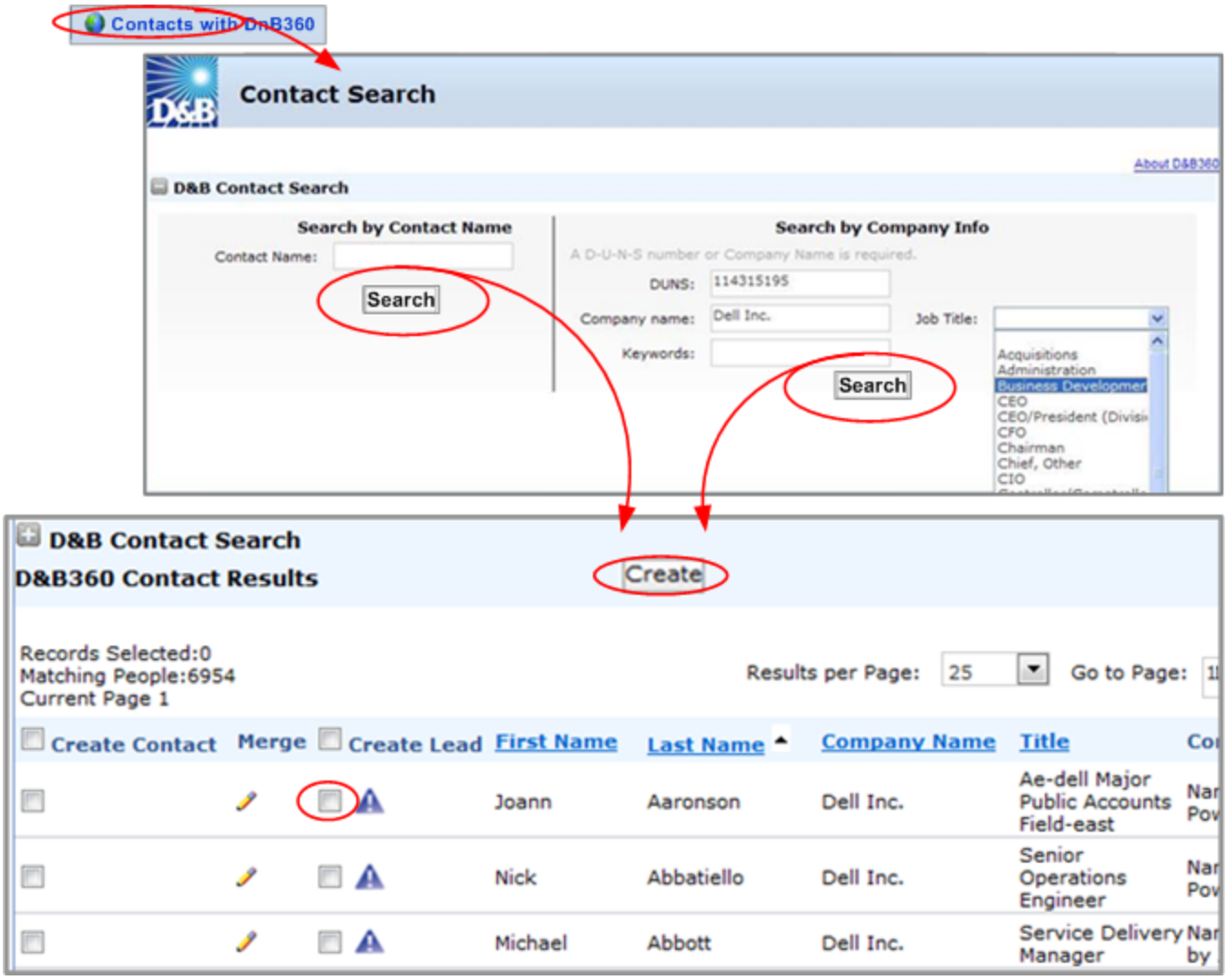
5. Next to the name of the contact in the **Create Lead** column, click to select the checkbox.
6. Click **Create**.

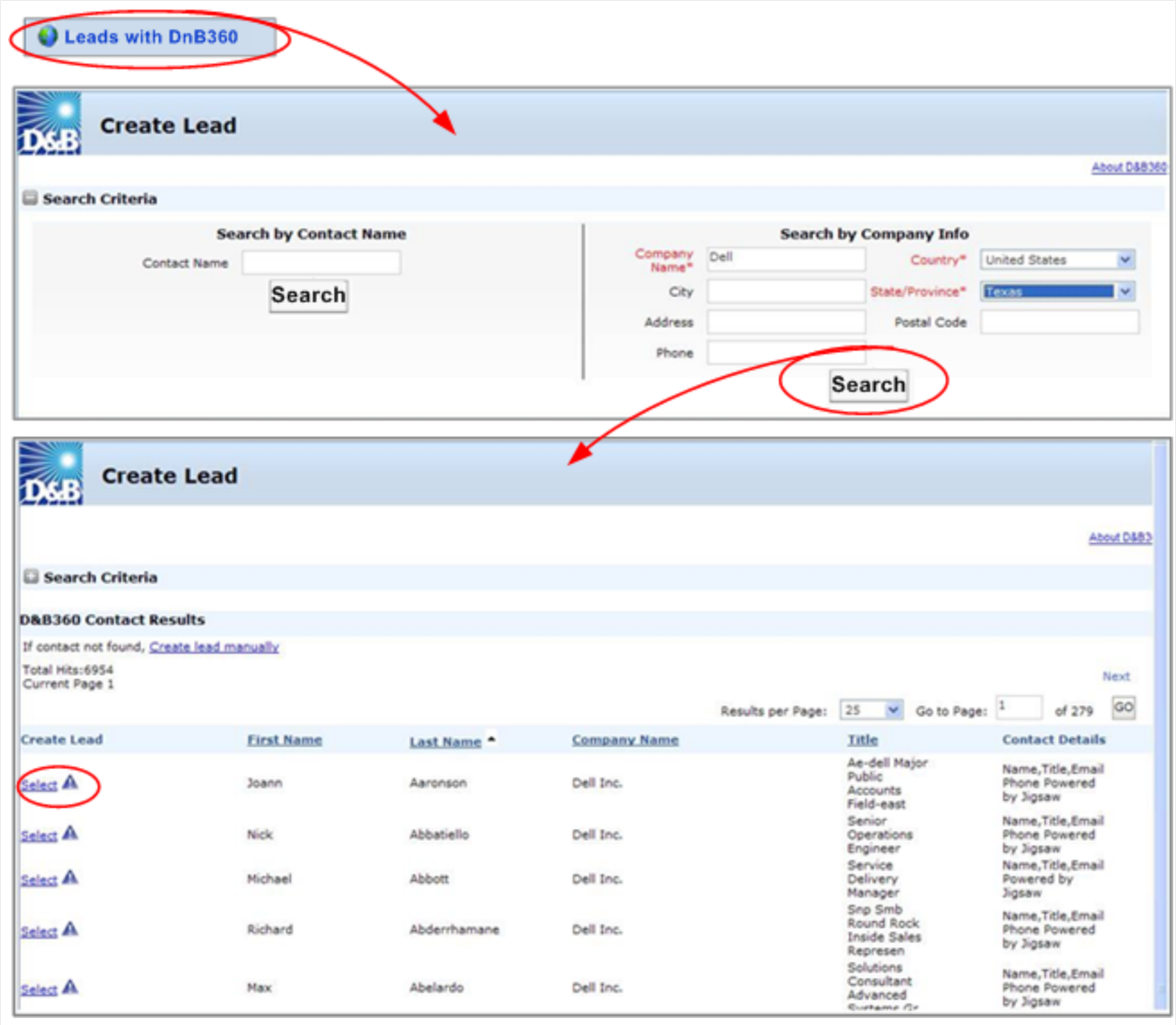


The blue warning triangle displays only with Leads and indicates that an account already exists for the company referenced in the lead. Before you add a person as a lead, you can see if that person is already a lead for an account.

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.



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**.

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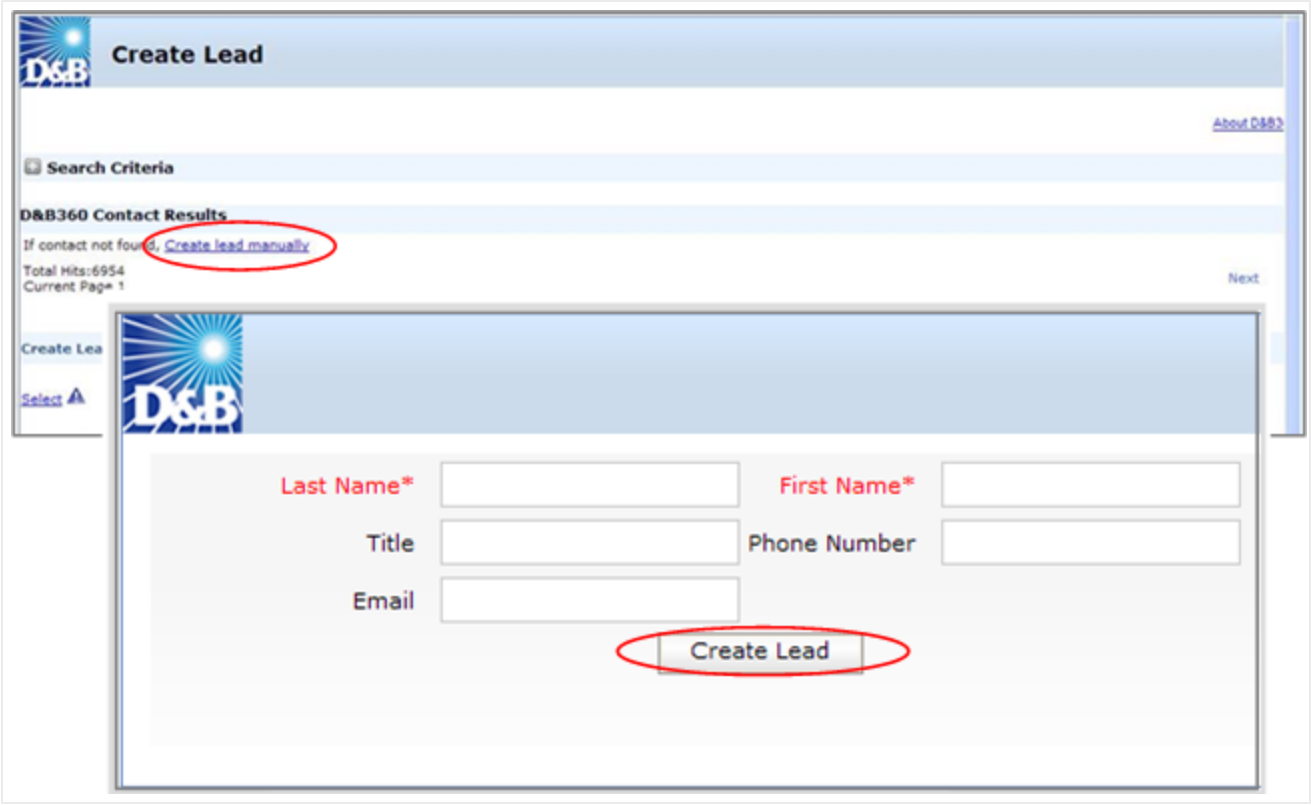
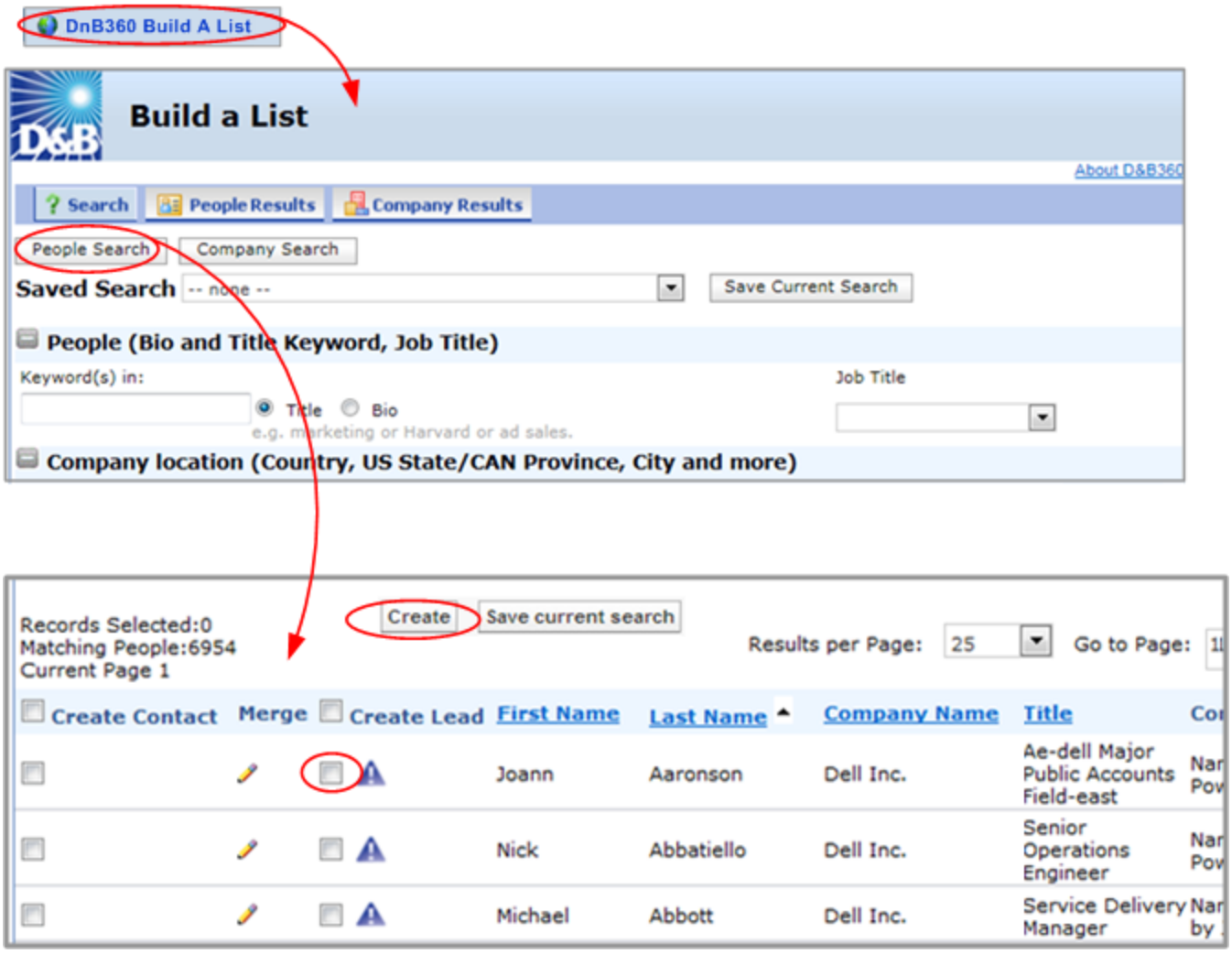
6. Type in the appropriate information for the lead you want to manually create.
7. Click **Create Lead**.



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**.



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**.

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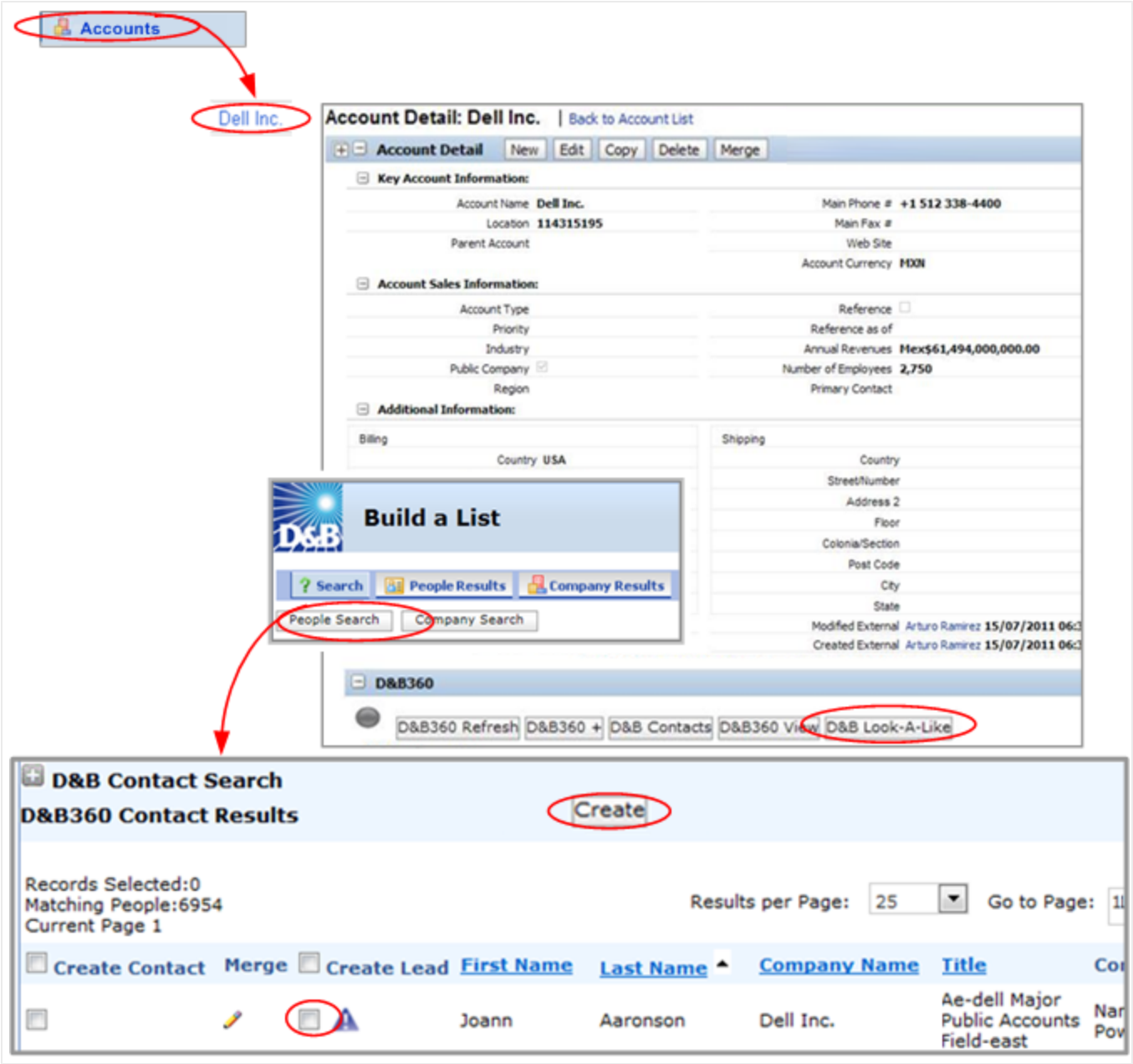

Creating a D&B360 Lead from a Competitor

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.

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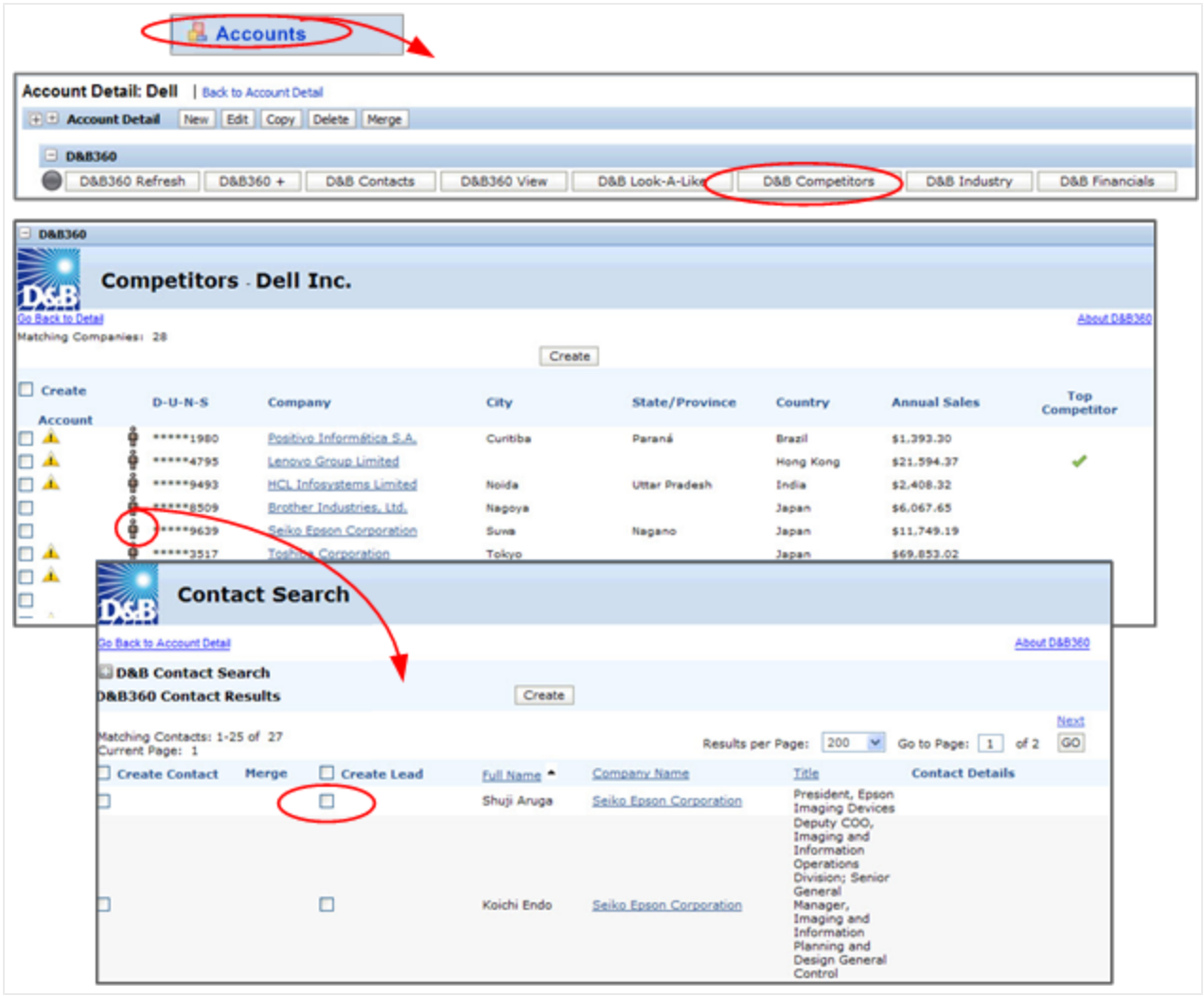

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7 Using Build a List

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.	

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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	• 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)

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Company type	Public or Private (select form 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.

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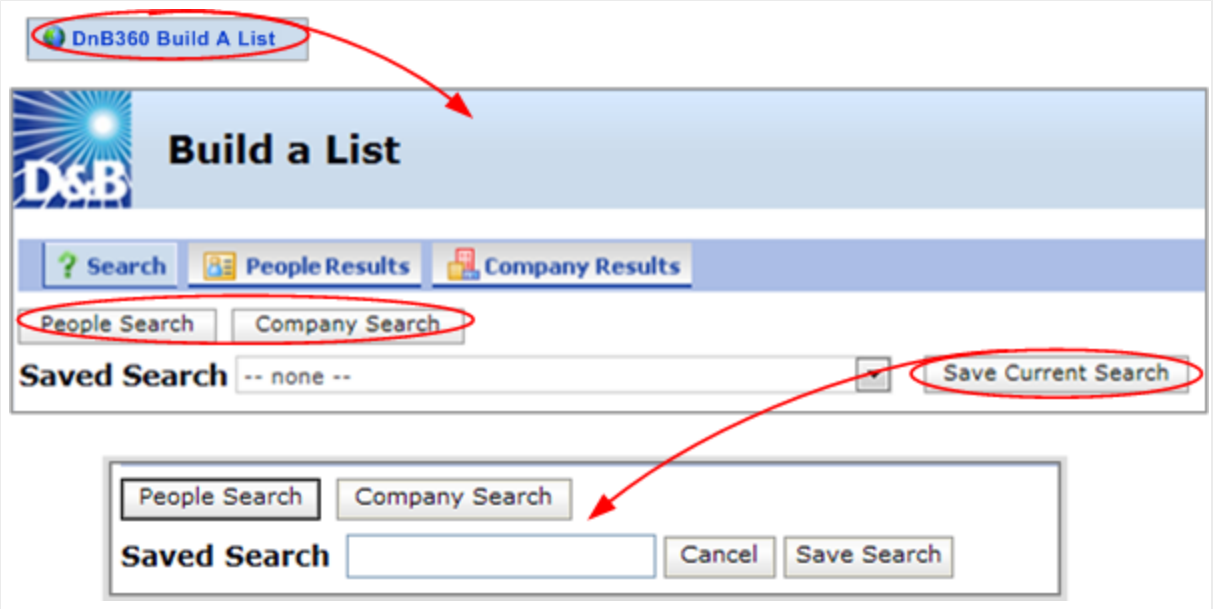
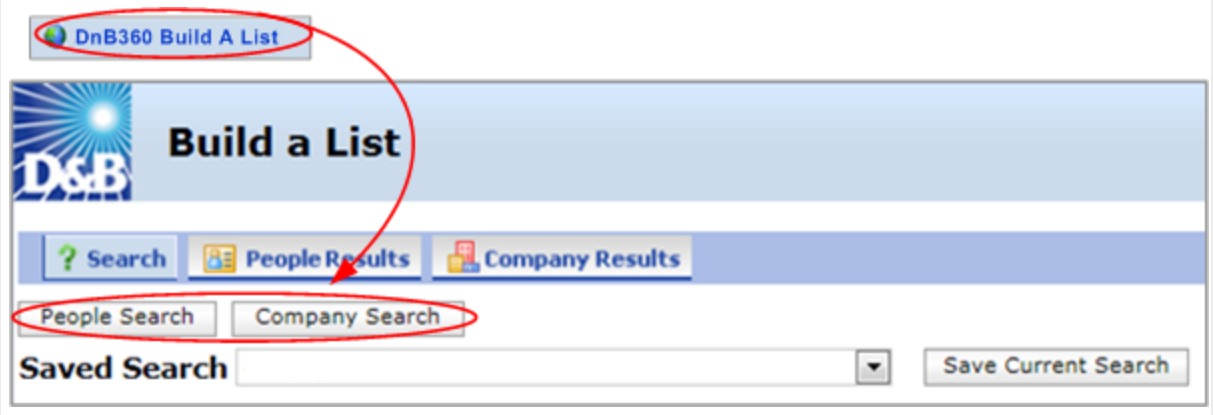


Using a Saved Search

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.



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