D&B360

User Guide

for SAP CRM

Version 2.3

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About this Guide

Audience and Purpose

This guide is for D&B360 SAP 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 SAP 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 SAP 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 SAP CRM.

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 SAP 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 SAP CRM, new menu items will display and provide access to the new features and functions.

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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.

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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.

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.

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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

Accessing the D&B360 Window

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

1. To log in to the SAP CRM, type your user name and password.
2. To access the D&B 360 window, you can either double-click **D&B360**, or from the left menu, select **D&B360**.

> **Note:** These new functions now display within your SAP CRM instance: Accounts with D&B360, Contacts with D&B360, and D&B360 Build A List.

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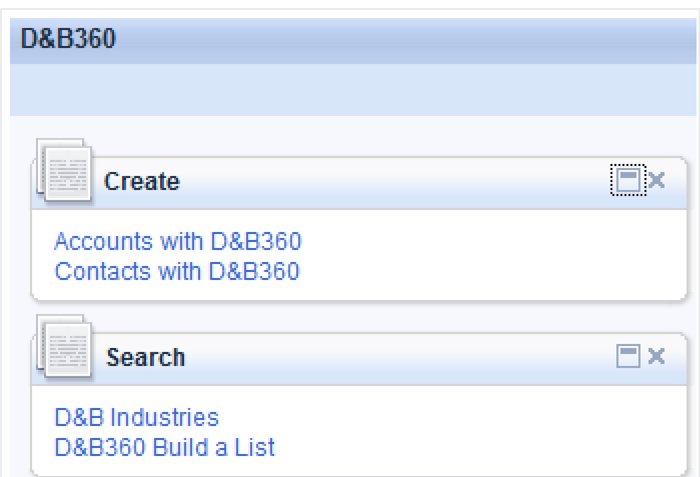

Using D&B360 Rest of World

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.

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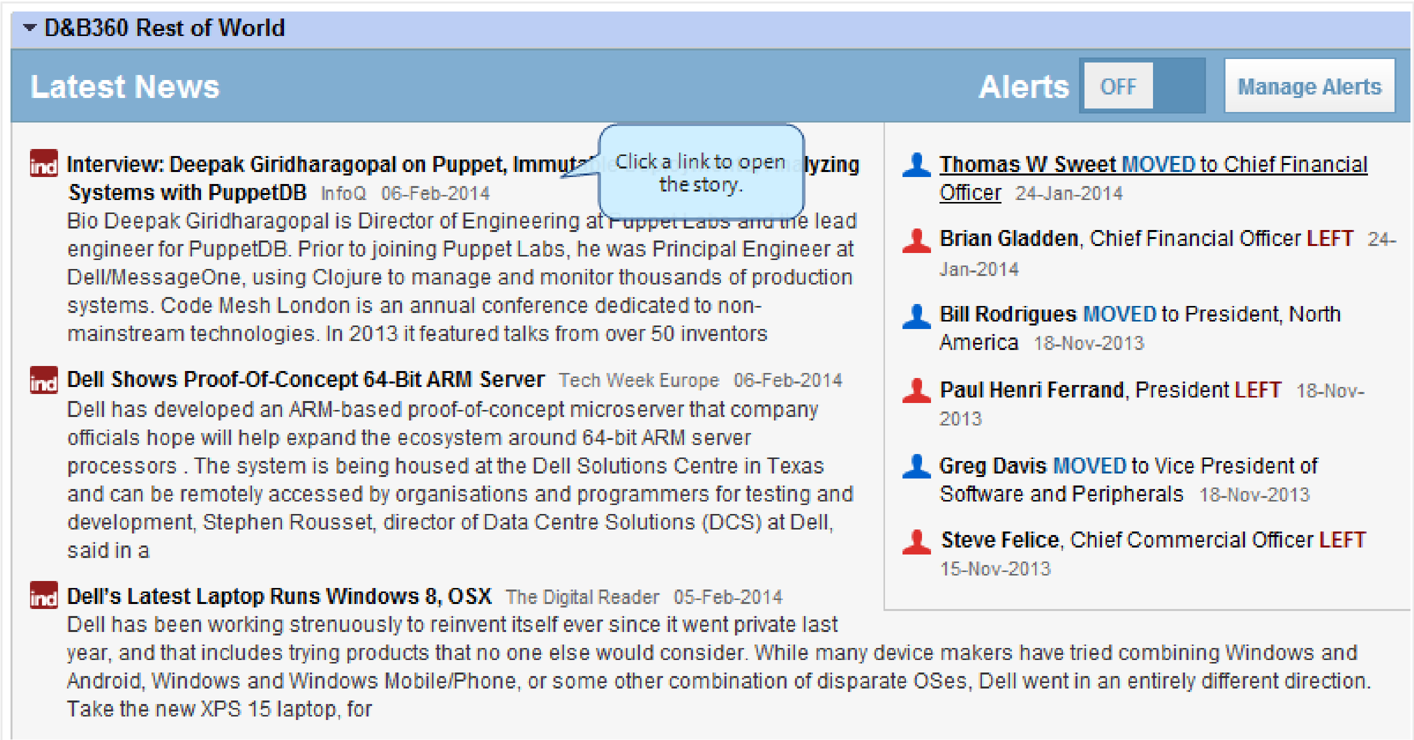
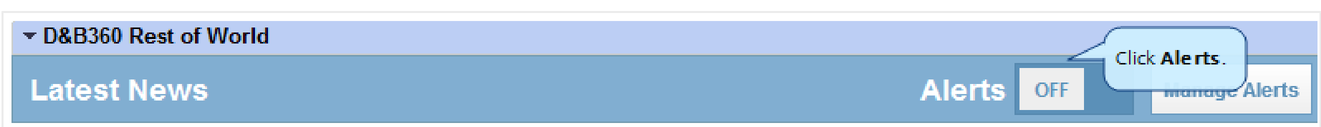


Setting Alerts

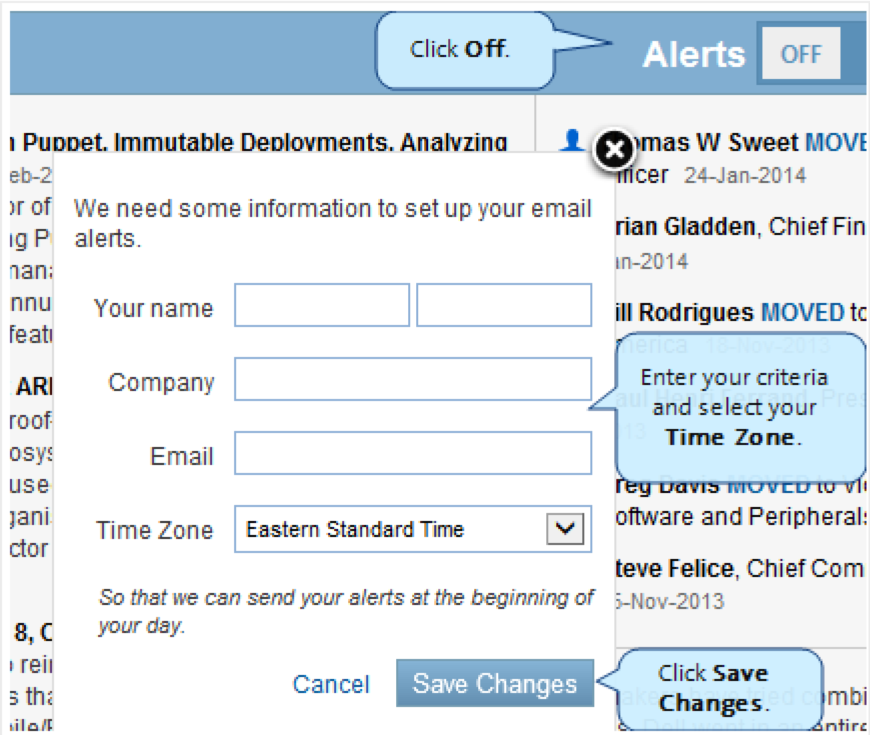
If you have already set alerts, the **On** button displays next to **Alerts**. If you haven't set alerts, the **Off** button displays next to **Alerts**. To set alerts:

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.

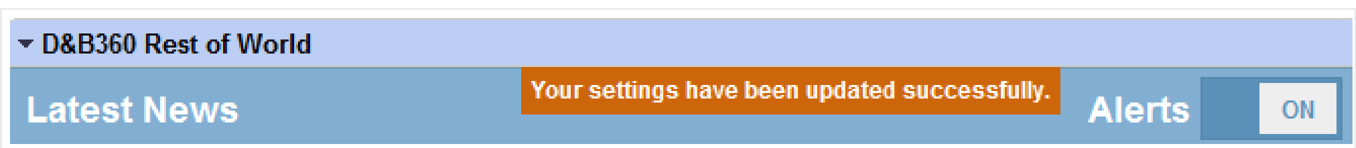


3. In the window that opens, type or enter your information in the fields that display and select your **Time Zone**.

4. Click **Save Changes**.

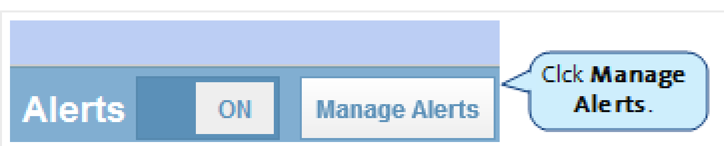


A message displays that your settings were updated, and the **Alerts** button changes to **ON**.



Managing Alerts and Triggers

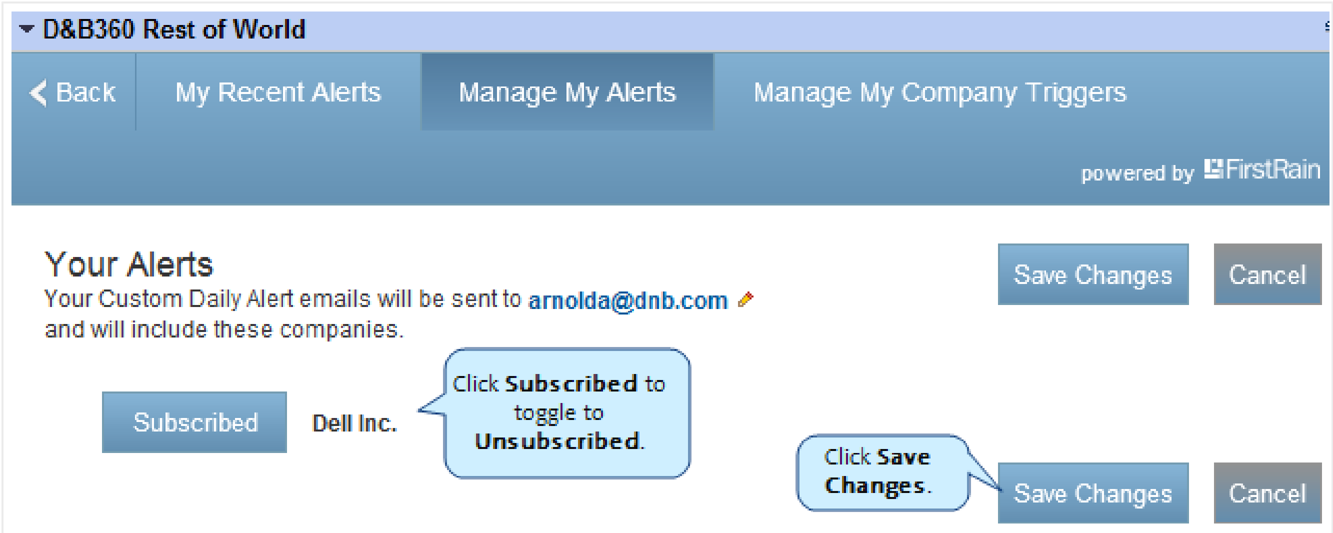
1. On the **D&B360 Rest of World** area, click **Manage Alerts**.



2. Click the **Manage My Alerts** tab to display **Your Alerts**.
3. Next to a company name whose news you have subscribed to, click **Subscribed** to toggle to **Unsubscribed**.

   – or –

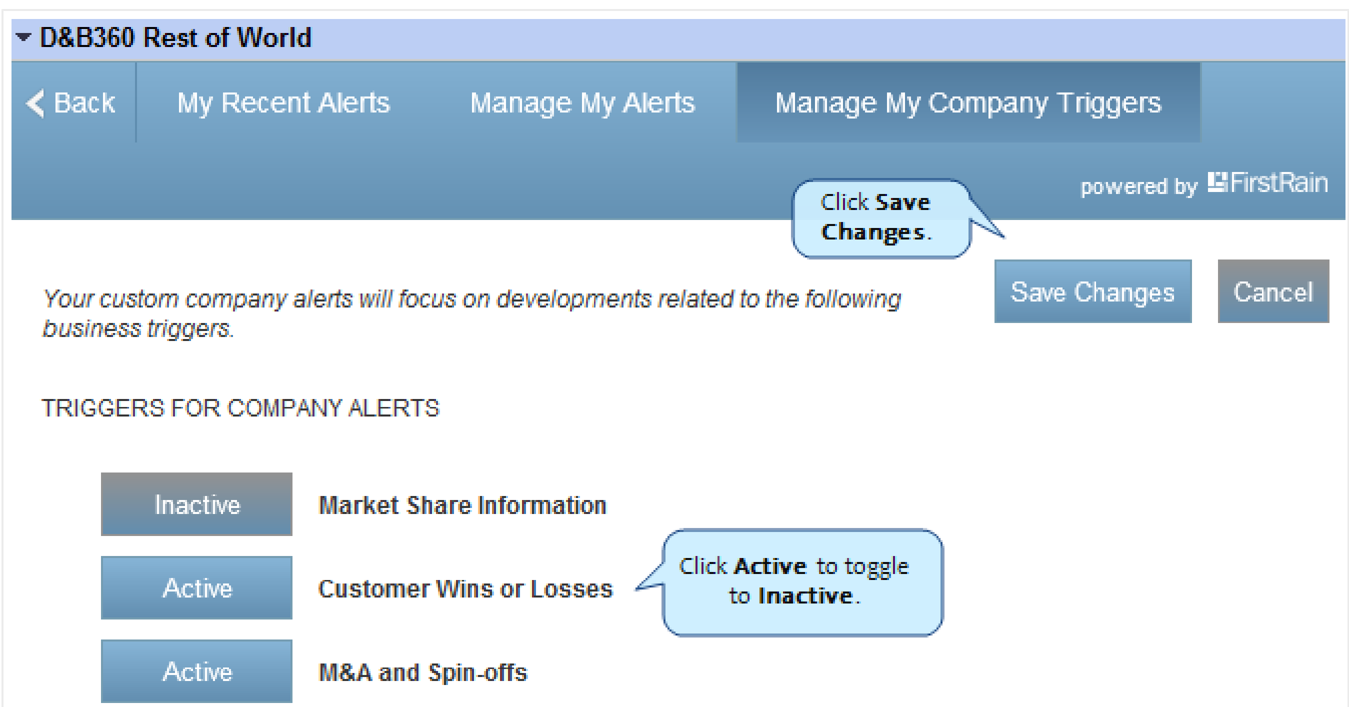
   Click **Unsubscribed** to toggle to **Subscribed**



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
Change/Remove	Allows you to change or remove D&B data — including company and contact — about an existing account, or to add D&B data to an account in your database that does not yet include D&B data. The Change and Remove buttons are located to the right of the D&B360 Account Details area.
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. On the SAP CRM interface, the Refresh button is located in the D&B360 Account Details area.
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.

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D&B Standard Icons

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

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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.

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.

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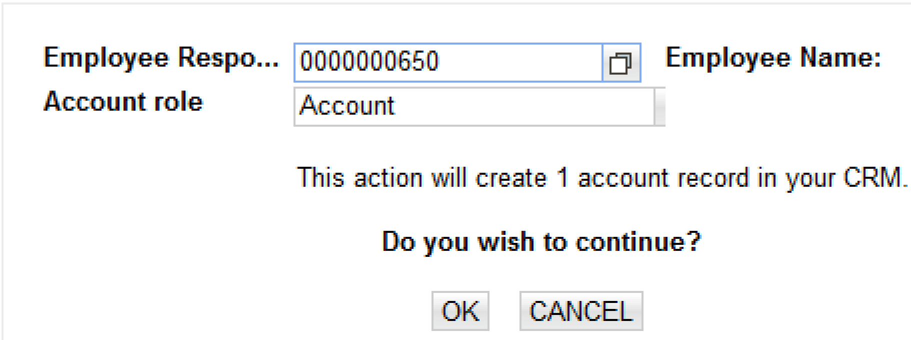
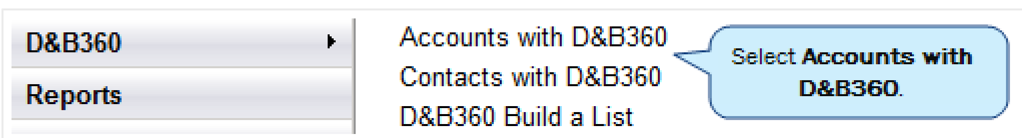
After you create or add a new account, the **Confirmation Message to Create Accounts** window will open. Click **OK** to add this account, or click **Cancel** if you do not want to add this record to your CRM.



Creating a D&B360 Account Using Name and Address

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

1. From the left menu, select **D&B360**, and then select **Accounts with D&B360**.



2. (Required) In the **Create Accounts with D&B360** 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.

> **Note:** State/Province is required only if you select the United States or Canada in the Country field. If you select another country, you cannot select State/Province.

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.**

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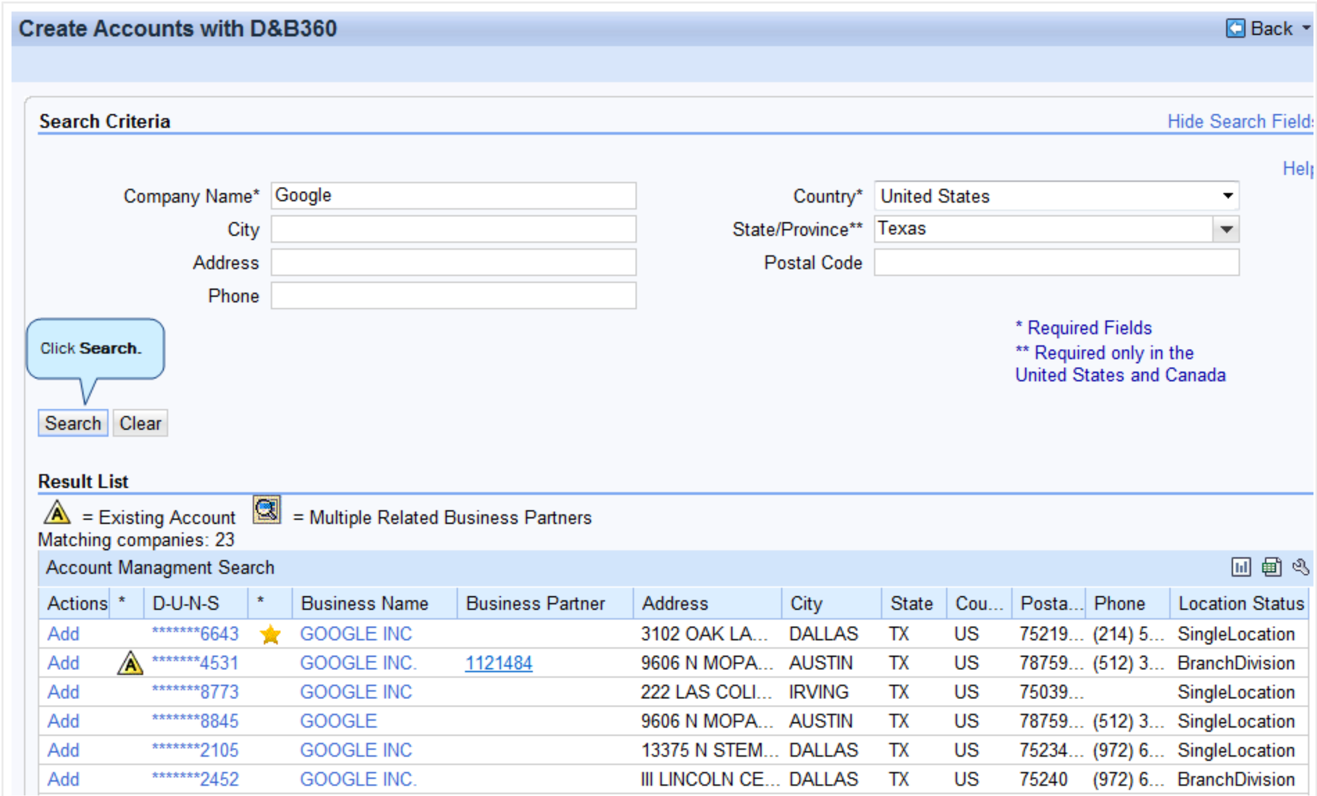
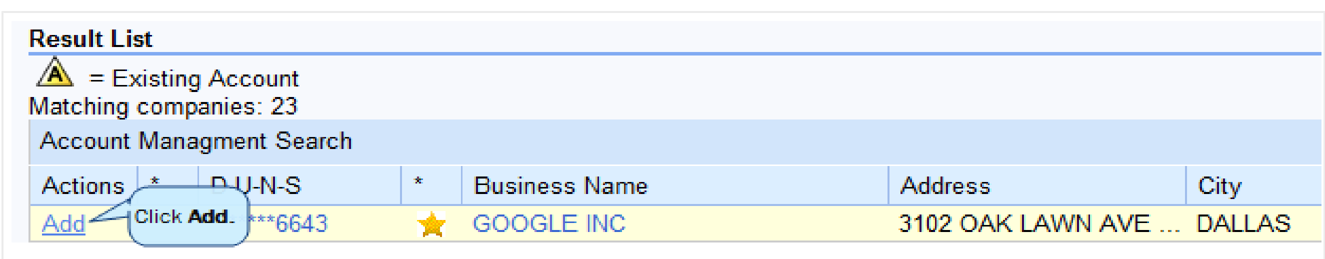


A gold star displays next to the first record and represents the Best Match found based on your search criteria. The more details you provide, the better the results.

> **Note:** If you want to review the match information before you make a decision, do not click Add. Instead, see "Review Match Information" on page 3-3.

6. To select the candidate that best matches your search criteria without reviewing the match information, select the appropriate row and click **Add**.

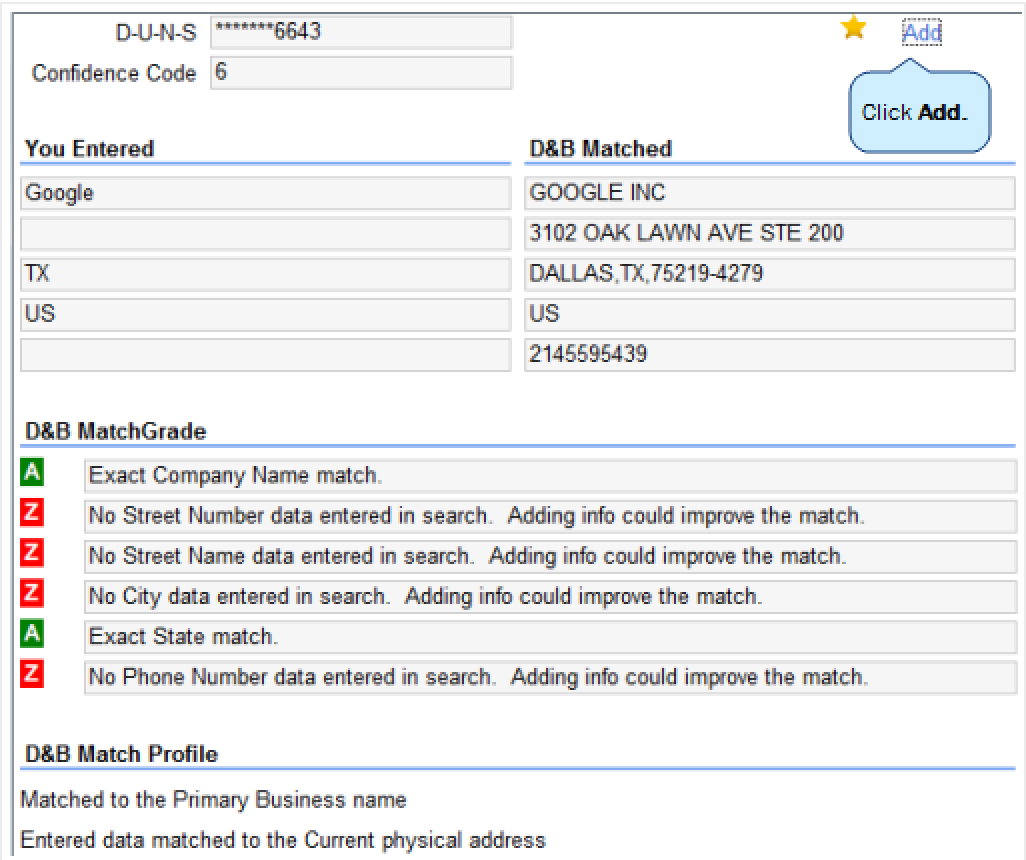


Review Match Information

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

1. In the **D-U-N-S** column, next to the match candidate that you selected, click the number.

The **D&B Match Info** window opens and provides additional insight into how that D-U-N-S Number was matched to the company entered.



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

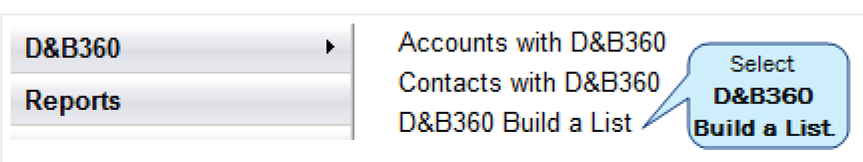
   – OR –

   To close the window without adding this account, in the upper right corner, click **X**.

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

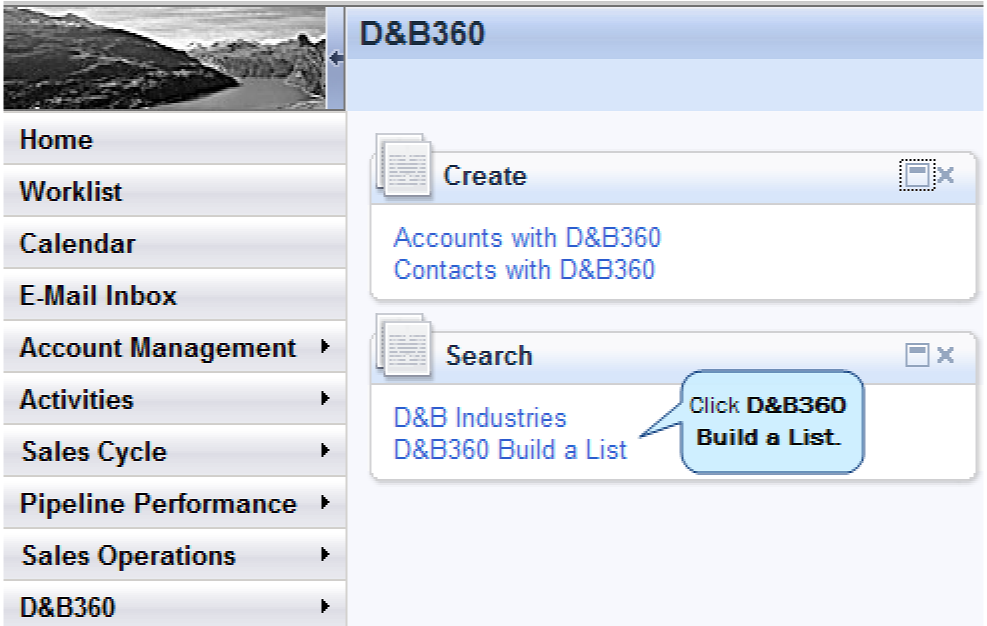
You can create an account by building a list of all available options, which you locate by specifying a set of unique criteria.

1. From the left menu, select **D&B360**, and then select **D&B360 Build a List**.



— or —

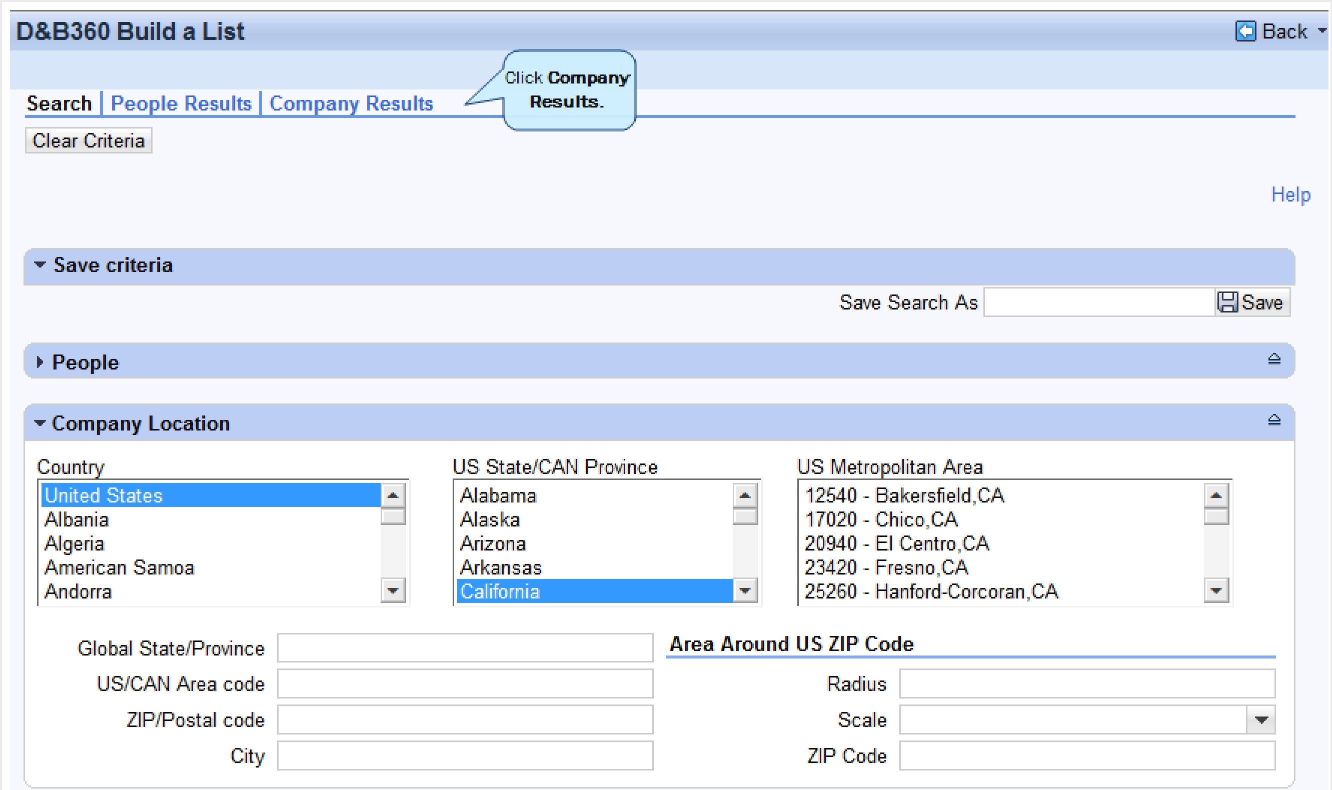
From the left menu, click **D&B360**, and in the **D&B360** window, click **D&B360 Build a List**.



In the **D&B360 Build a List** window. several categories of information display. For more information about each of the categories, see the end of this section. Also see "Using Build a List" on page 6-1.

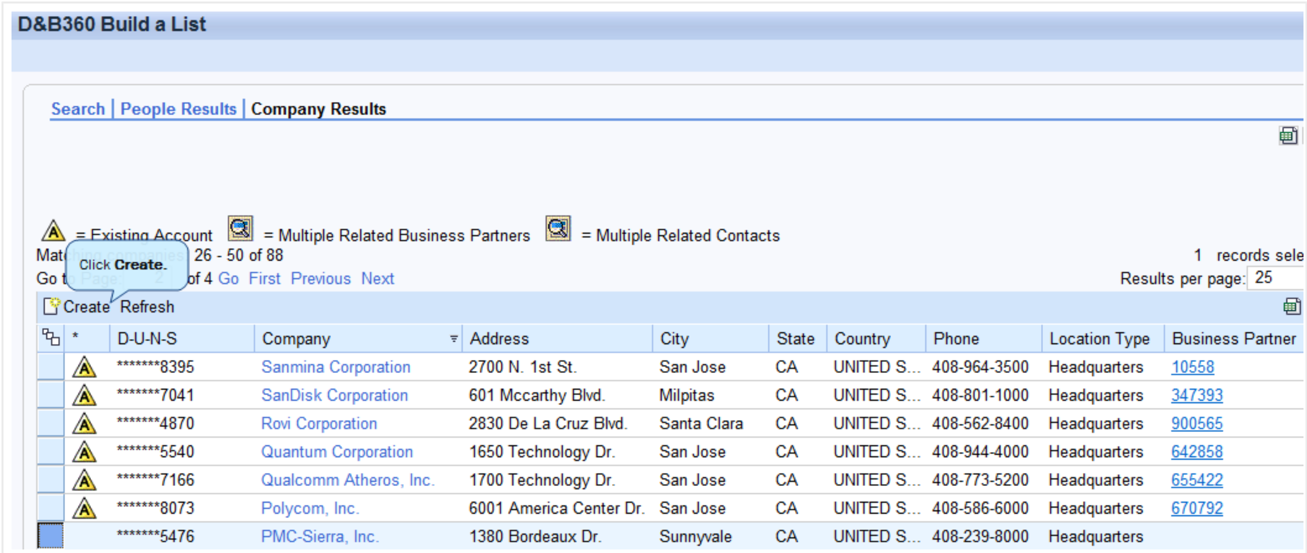
Note: You will not use the **People** section for this search.

2. Select the criteria you want to search on, and then click **Company Results**.



3. In the **D&B360 Build a List** window, next to the account you want to add, click the blue box to select that company, and then click **Create**.

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



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

Criteria Categories

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

For specific information that you can enter within each of these categories, see "Using Build a List" on page 6-1.

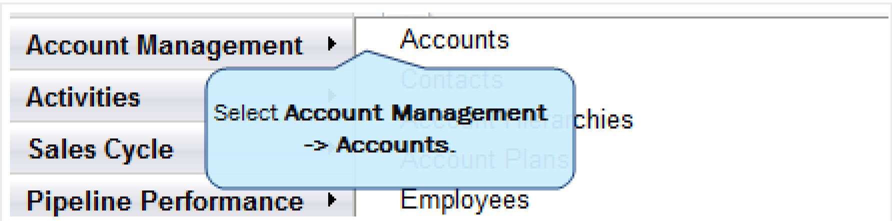
Links to this specific category details section are provided below to identify the information collected for:

- 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. To list your existing accounts, on the left menu select **Account Management**, and then select **Accounts**.



2. In the **Search** window, click **Search** to list your accounts.

   — or —

   In the **Search Criteria** area, complete the fields to find a specific account.

3. Select the account whose attributes you want to use.

4. In the **Corporate Account** window for that account, **D&B360 Account Details** area, click **D&B Look-A-Like**.

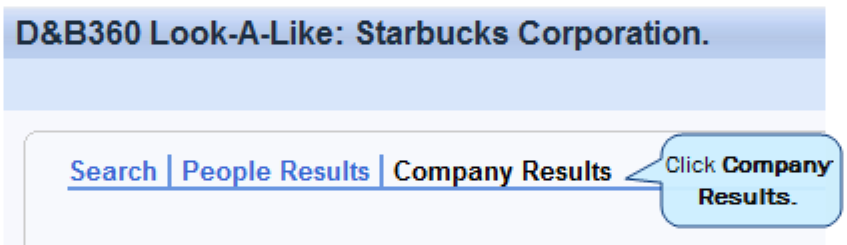
> **Note:** Attributes of the original account selected will populate the search fields. To obtain better search results, we recommend that you examine, alter, or add criteria information.

The **D&B360 Look-A-Like** window for this account opens and displays the **D&B360 Build-A-List** format with certain criteria pre-populated.

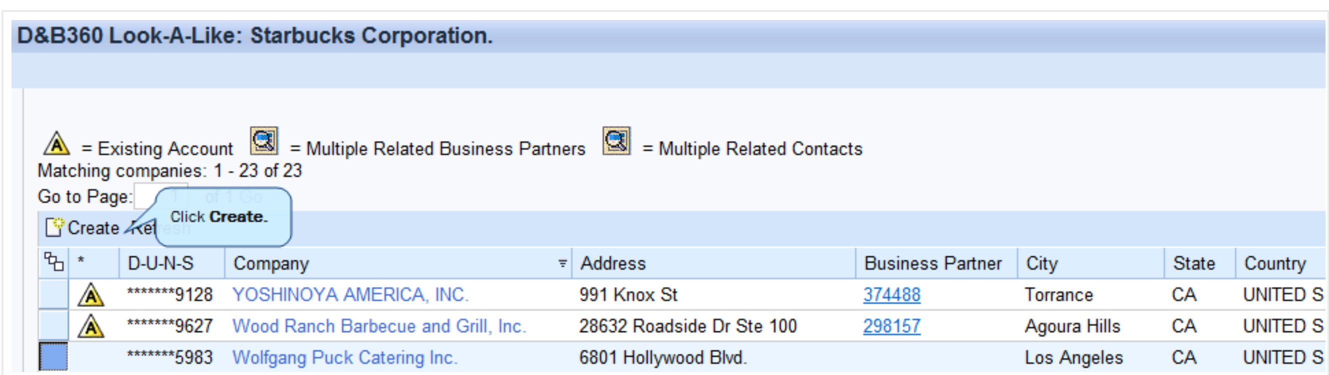
5. Evaluate the pre-populated criteria and decide which categories you want to retain and those you want to alter.

   For example, you might want to search on companies of a similar size. Or you might want to clear the state and run the search on all states.

6. To display a list of companies based on your search criteria, click **Company Results**.



7. Next to the company name that you want to use to create a new account, click the blue box to select it, and then click **Create**.



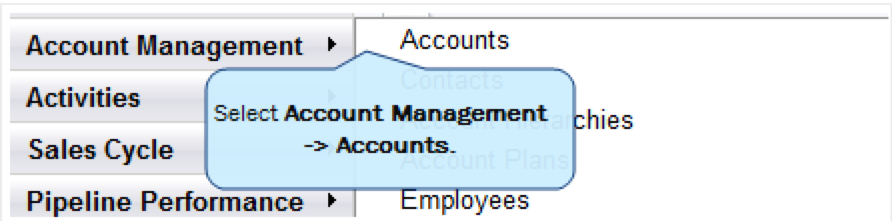
After you click **OK**, the new account is created.

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

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

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

1. To list your existing accounts, on the left menu select **Account Management**, and then select **Accounts**.



2. In the **Search** window, click **Search** to list your accounts.

   — or —

   In the **Search Criteria** area, complete the fields to find a specific account.

3. Select the account that you want to pursue.

4. In the **Corporate Account** window for that account, click **D&B360 View**.

5. In the **D&B360 View** window, to display a list of related Family Tree members, click **Family Tree Query** or **Family Tree Hierarchy**.

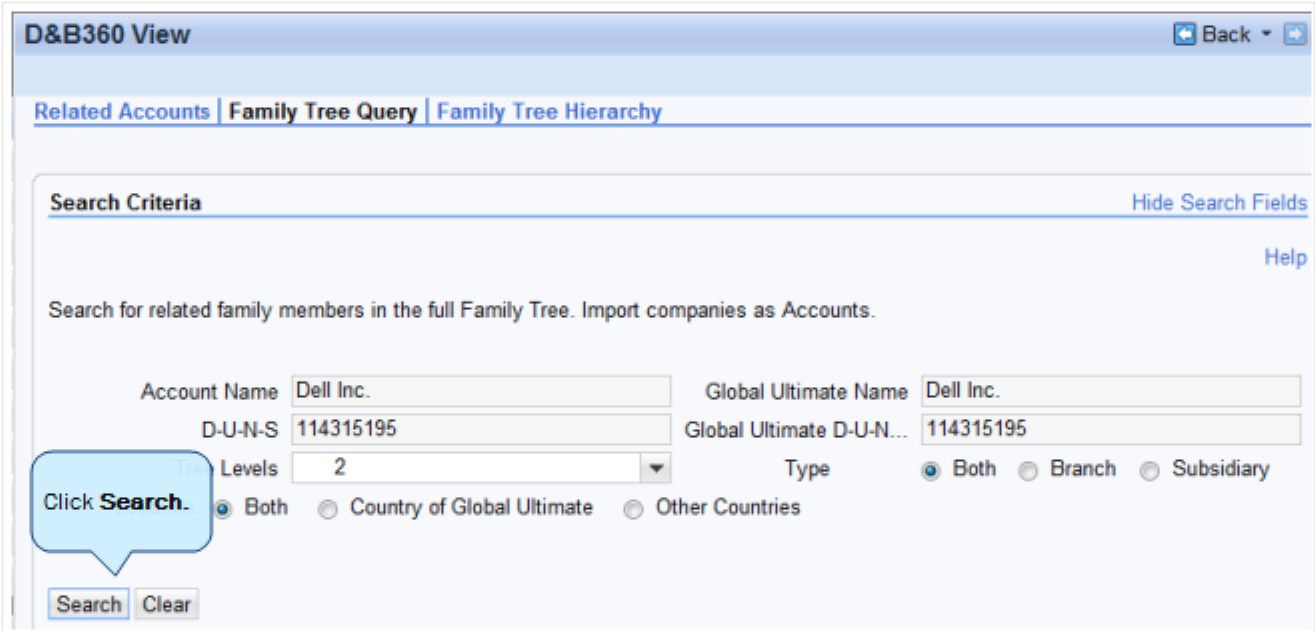
Family Tree Hierarchy provides the same information as Family Tree Query, but in a graphical display based on corporate family relationships.

Filtering Your Search

After you select **Family Tree Query** or **Family Tree Hierarchy**, 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.

1. Make sure the filtering criteria you selected is what you want.
2. Click **Search**.



3. To identify the accounts you want to create, select 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.

4. Click **Create**, then wait until the status indicator displays in green

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

Reviewing Results when Searching by Family Tree Hierarchy

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

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

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

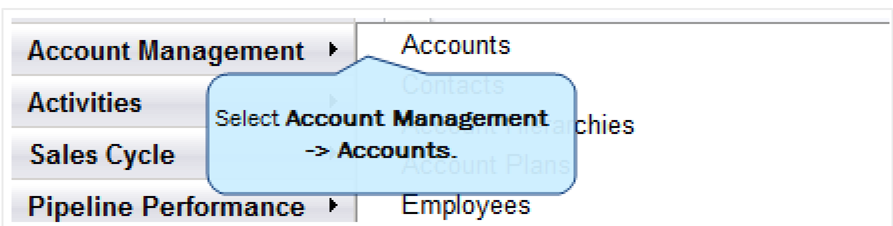
5. Complete these steps to search by Family Tree Hierarchy:
6. Make sure you have selected the filtering criteria that you want to filter on.
7. Click **Search**.
8. To identify the accounts that you want to create, click the corresponding check boxes.

   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

You can use this feature to identify the competitors to your accounts and then add those competitors into your CRM for nurturing.

1. To list your existing accounts, on the left menu select **Account Management**, and then select **Accounts**.

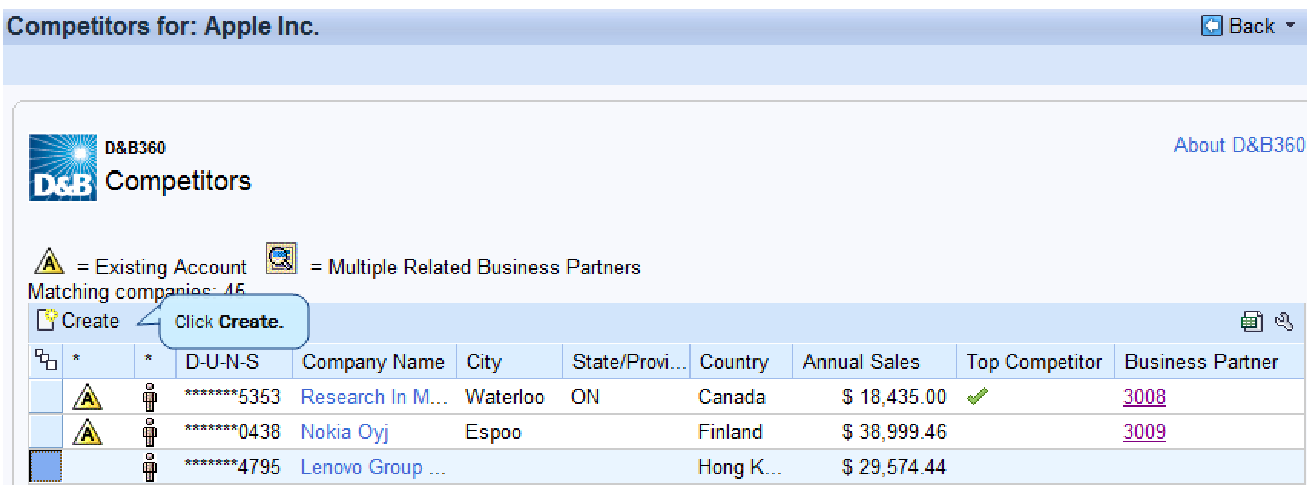


2. In the **Search** window, click **Search** to list your accounts.

   — or —

   In the **Search Criteria** area, complete the fields to find a specific account.
3. Select the existing account that you want to pursue.
4. In the **Corporate Account** window for that account, click **D&B Competitors**.

5. In the **Competitors** window for that account, click the blue box next to any company that you want to add to your Accounts to select it, and then click **Create**.



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

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.

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.

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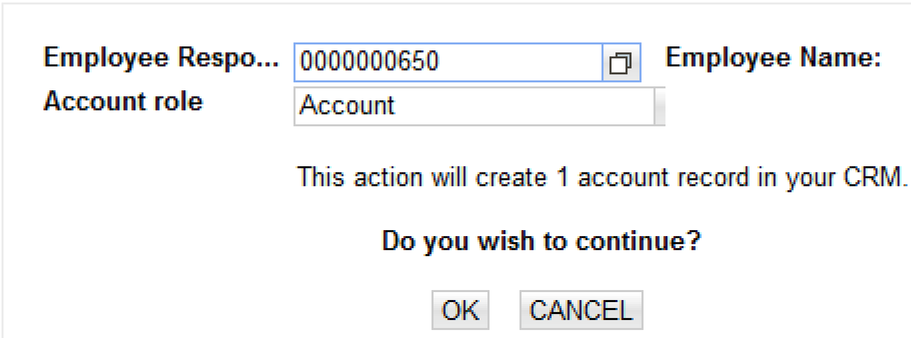
After you create or add a new account, the **Confirmation Message to Create Accounts** window will open. Click **OK** to add this account, or click **Cancel** if you do not want to add this record to your CRM.



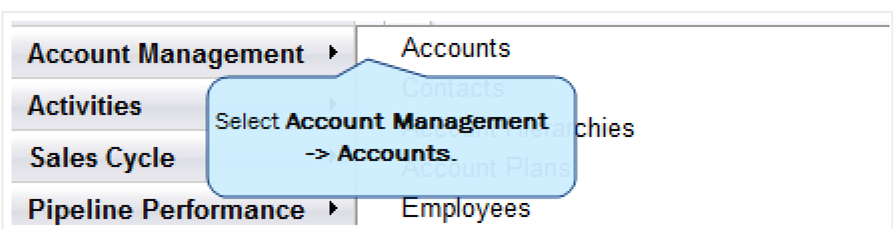
Leveraging ROW

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 left menu select **Account Management**, and then select **Accounts**.



2. In the **Search** window, click **Search** to list your accounts.

   — or —

   In the **Search Criteria** area, complete the fields to find a specific account.

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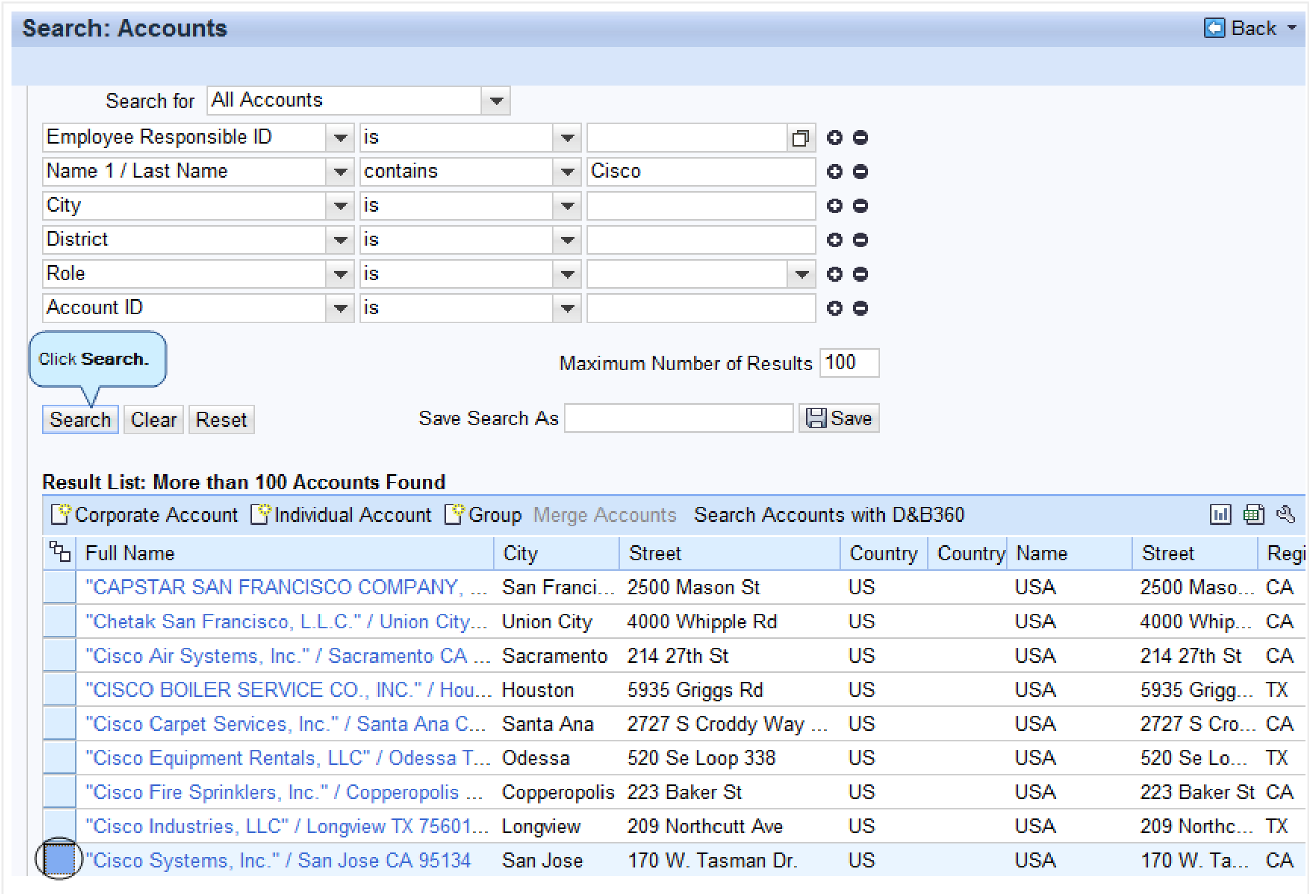
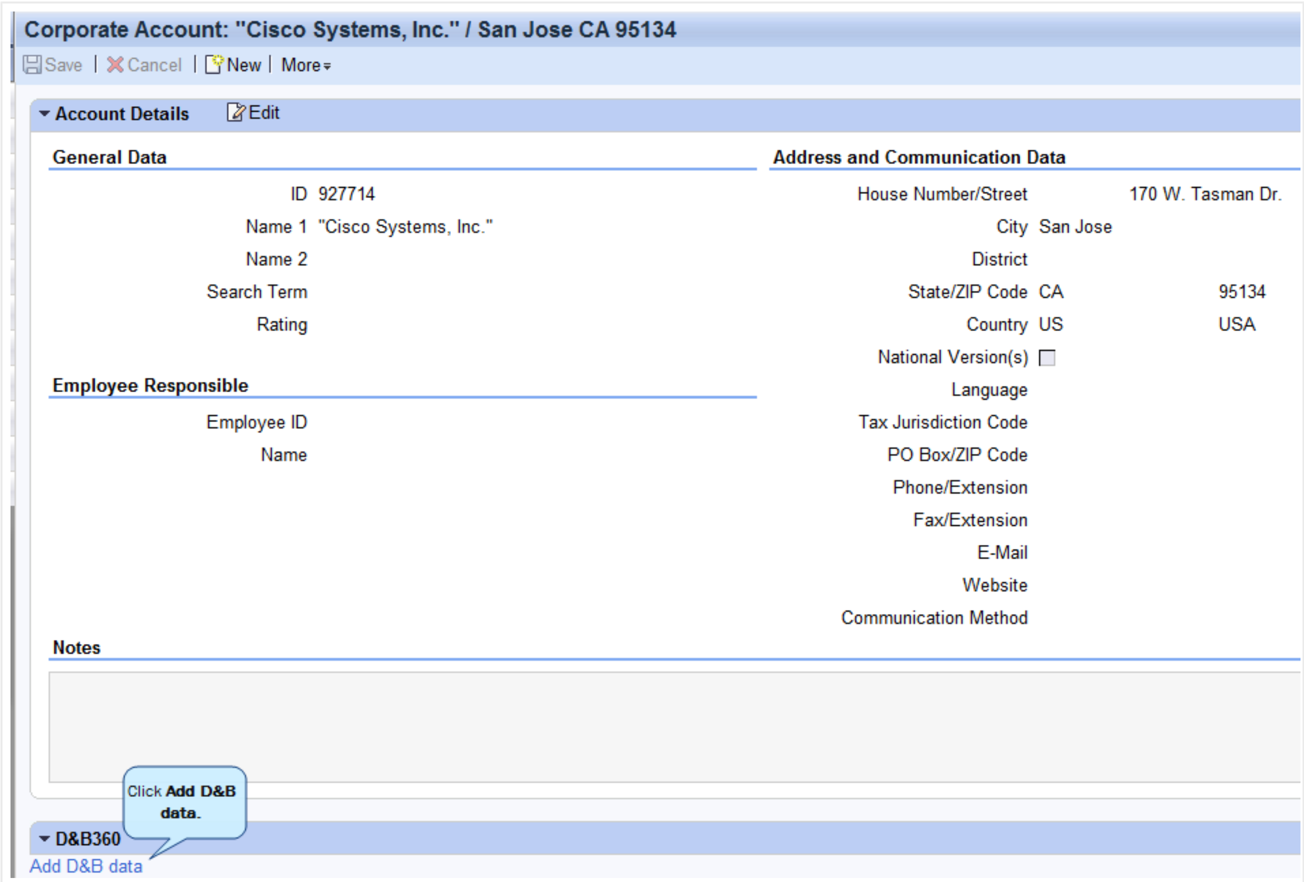


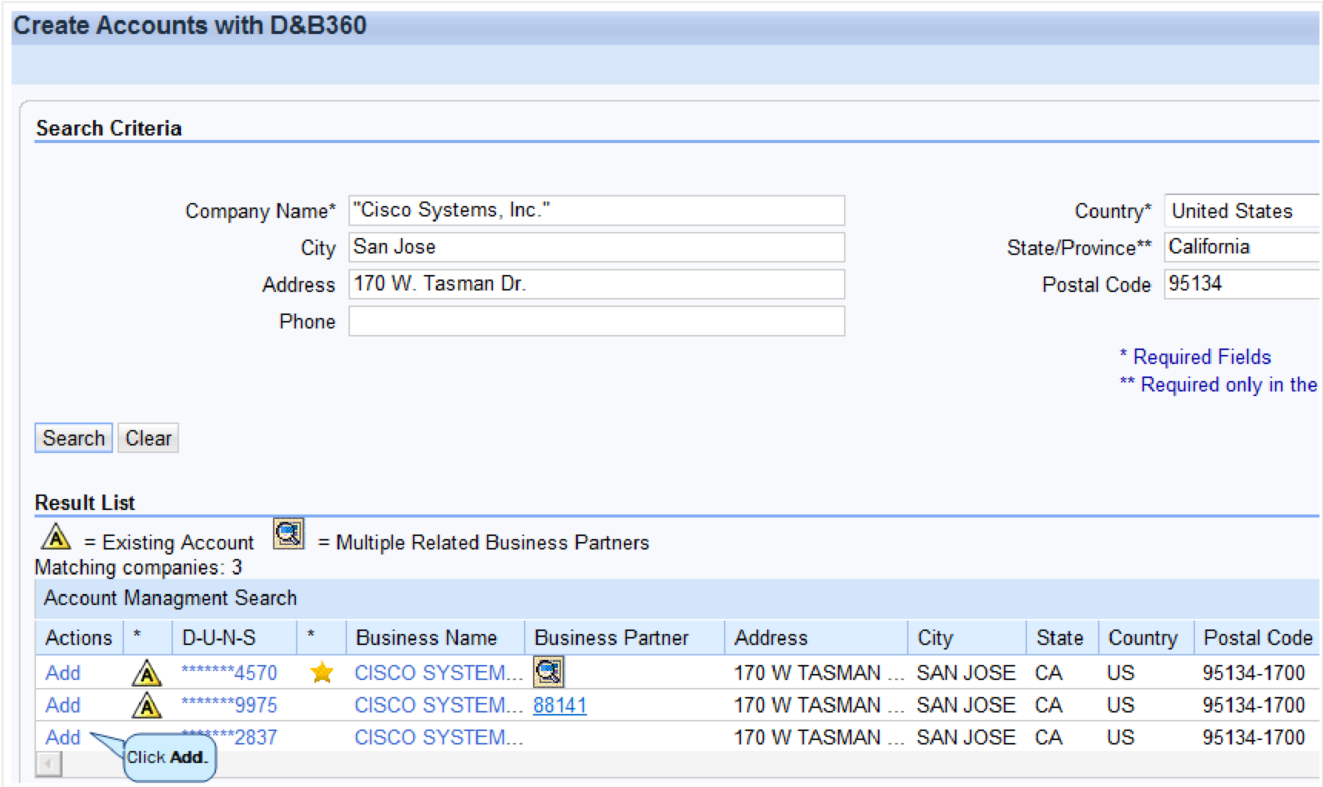
3. After you select an account that needs D&B data, in **Account** window, **D&B360** area, click **Add D&B data**.

> **Note:** If you need to create new accounts that do not already have D&B Data, uses these steps: Go to **Account Management -> Corporate Account** and search for any companies you want to add to your accounts.



4. In the **Create Accounts with D&B360** window, to display matching companies, click **Search**.

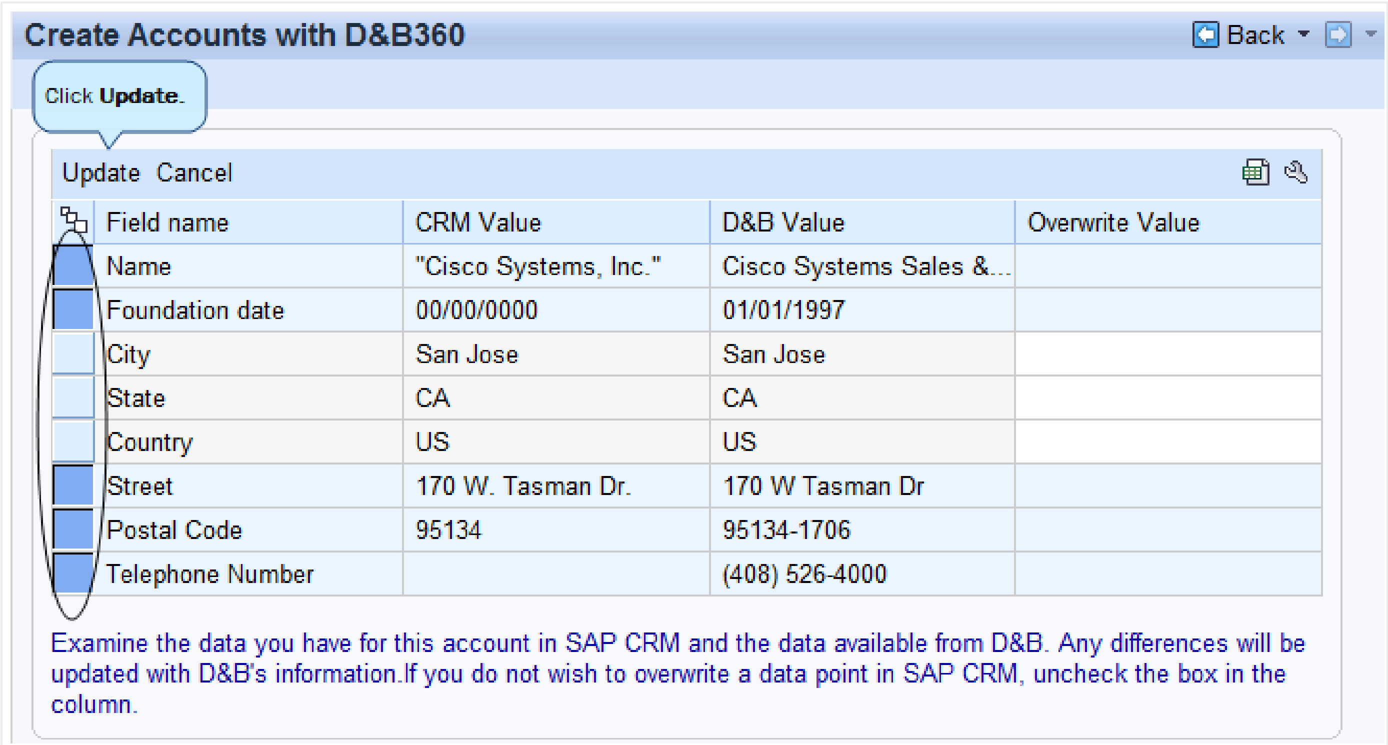
5. To select the account you want to use, click **Add**.



6. In the message window that opens, click **OK** to create the new account record.

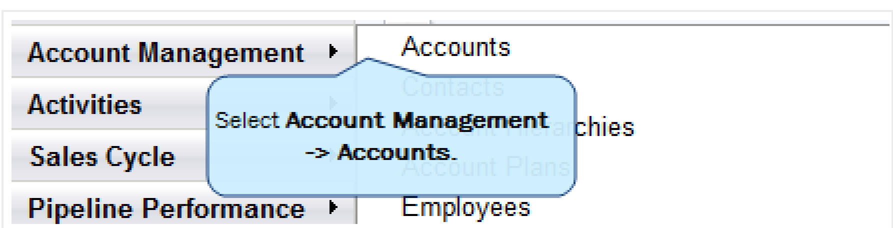
7. Review each new value to identify which data you want to use to update the account.

8. Click **Update** to add that data to the account.



Identifying Related Accounts using D&B360 View

1. To list your existing accounts,on the left menu select **Account Management**, and then select **Accounts**.



2. In the **Search** window, click **Search** to list your accounts.

   — or —

   In the **Search Criteria** area, complete the fields to find a specific account.

3. Select an existing account that you want to pursue.

4. In the **Corporate Account** window for that account, **D&B360** area, click **D&B360 View**.

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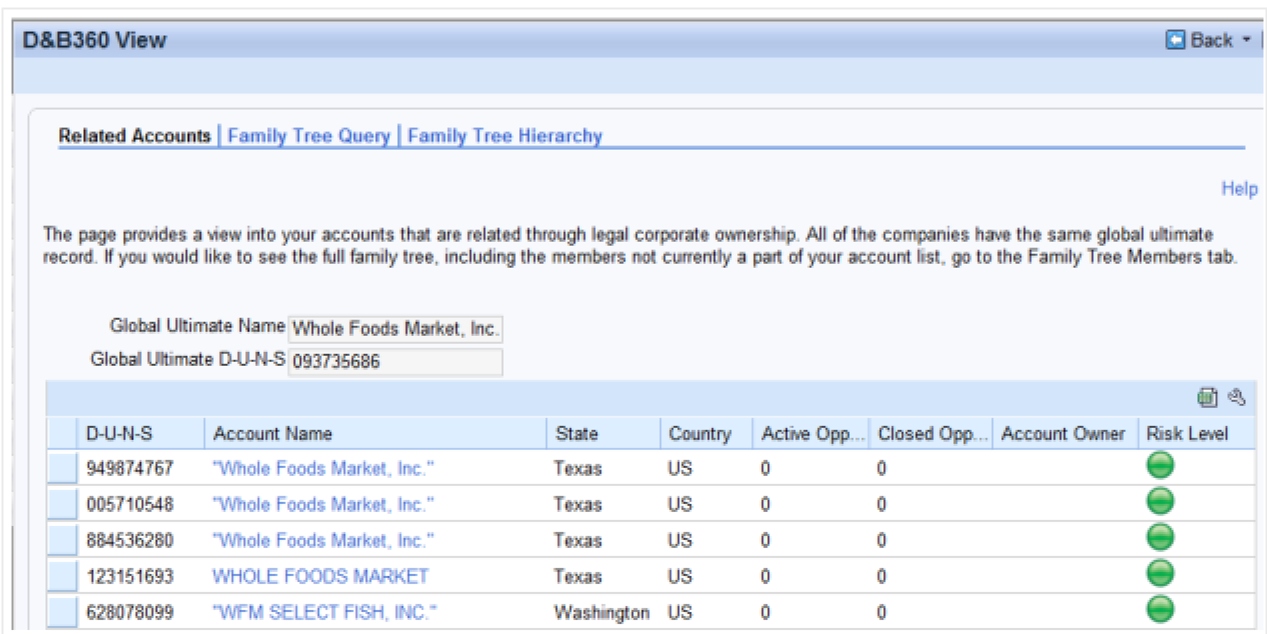
The **D&B360 View** window displays related accounts.



5. To become more familiar with the data, find a specific related account, or prepare to add one of the listed accounts as a new account, review the data in the **D&B360 View** window.

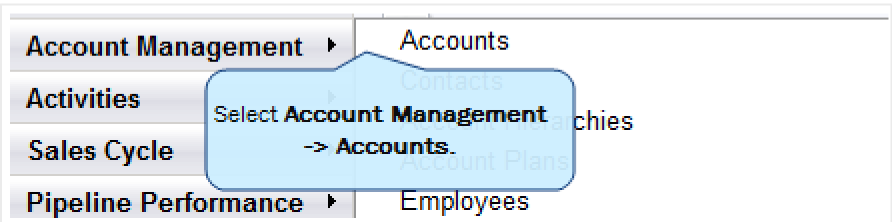
   Green, yellow, and red icons next to an account indicate its risk level (see "Identifying D&B360 Standard Options and Icons" on page 2-6.)

Finding Industry Information about Existing Accounts

Industry Information powered by First Research is a valuable tool that can help you prepare for a sales call or customize a marketing message. By gaining perspective on a specific industry's business challenges and opportunities, you can quickly gain important knowledge and insight. Each D&B360 account is mapped to related industries through their SIC code.

Displaying Industry Information

1. To list your existing accounts, on the left menu, select **Account Management**, and then select **Accounts**.



2. In the **Search** window, click **Search** to list your accounts.

   — or —

   In the **Search Criteria** area, complete the fields to find a specific account.

3. Select the account you want to enrich with D&B Industry information.

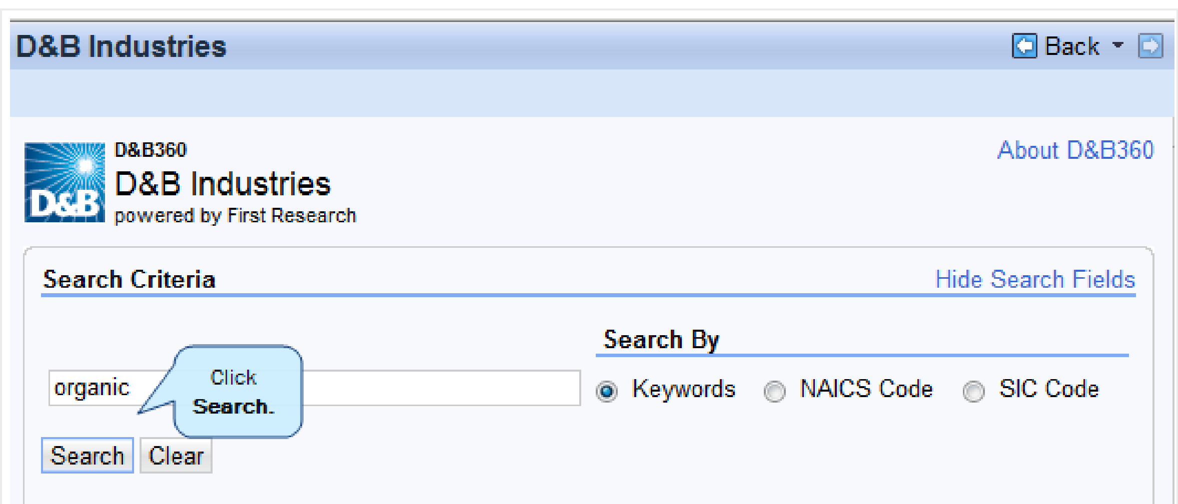
4. In the **Corporate Account, D&B360** section, scroll down and click **D&B Industry**.

The **D&B Industry window**, powered by First Research, displays a list of industry codes and descriptions for that business. If you don't see a related industry that you believe should be included, you can add it. For more information, see "Adding Industry Information to an Existing Account" on page 4-9.

Adding Industry Information to an Existing Account

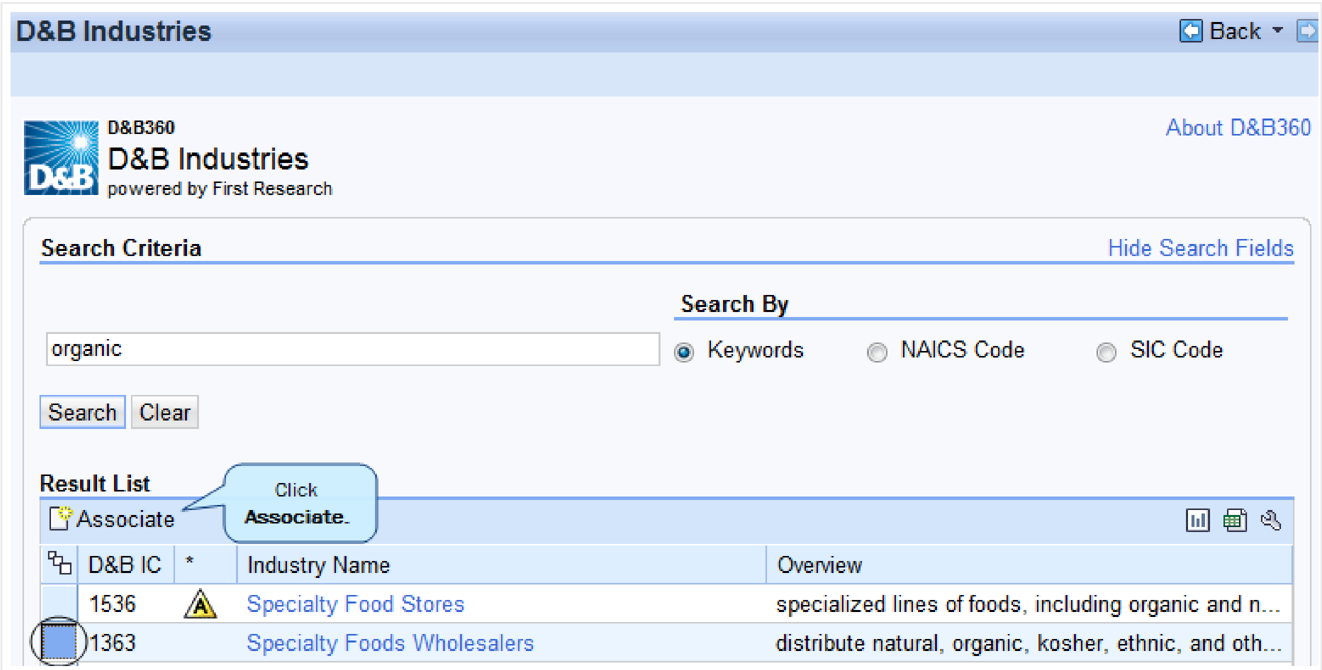
1. To search for other industries, click **Add**.

2. In the **D&B Industries** window, **Search Criteria** area, choose **Search By Keywords**, **NAICS Code**, or **SIC Code**, then type the related text for your search.
3. Click **Search**.



Associating Industry Information

- To add this type of industry to your account, select the industry, and click **Associate**.



Leveraging Industry Information

- To learn more about an industry listed in the **Industry Name** column, click the name.

  The **D&B Industry Details** window powered by First Research opens and provides comprehensive business information for that industry.

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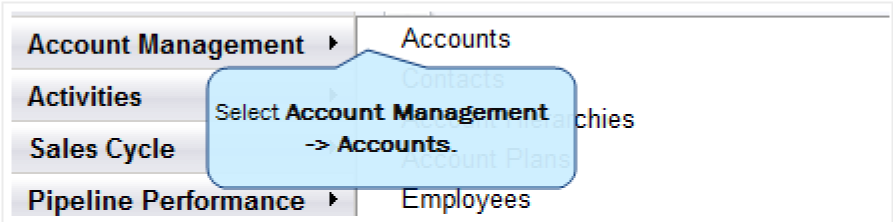
- To remove any industry that you manually added to an account, click to select it, then click the trash can  icon.

Adding Financial Information to Existing Accounts

1. To list your existing accounts, on the left menu, select **Account Management**, and then select **Accounts**.



2. In the **Search** window, click **Search** to list your accounts.

   — or —

   In the **Search Criteria** area, complete the fields to find a specific account.
3. Select the account for which you want to refresh financial data.
4. In the **D&B360 Account** window for that account, click **D&B Financials**.

5. In the **D&B360 Financials** window, **Financials** area, click **Import Information from D&B360**.

6. In the **D&B Financials** window, to upload the most up-to-date financial data, click **Refresh Financial Data**.

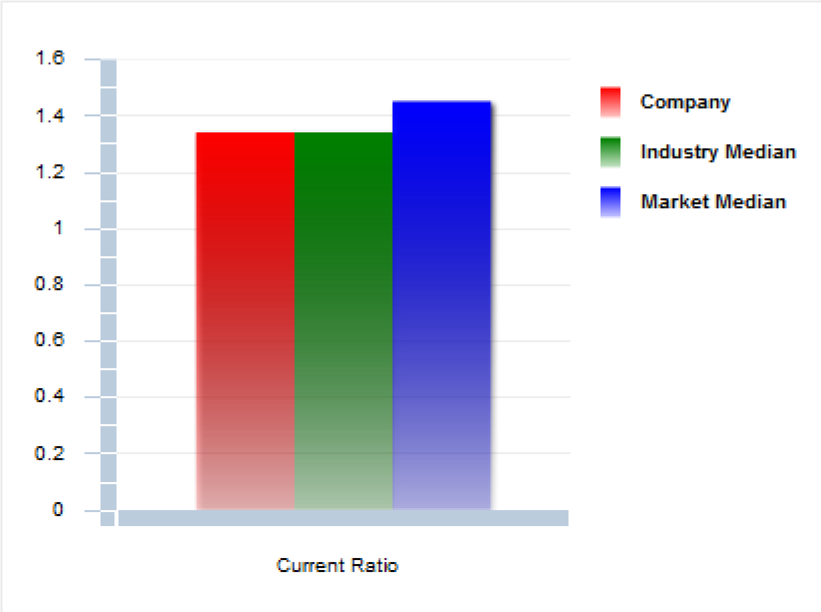
7. To view more information for each category, click the right arrow to expand it.

   See the illustration that follows.

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

8. For categories that include graphical information, click the graph icon.

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


1.6
1.4
1.2
1
0.8
0.6
0.4
0.2
0
Company
Industry Median
Market Median
Current Ratio

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.

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.

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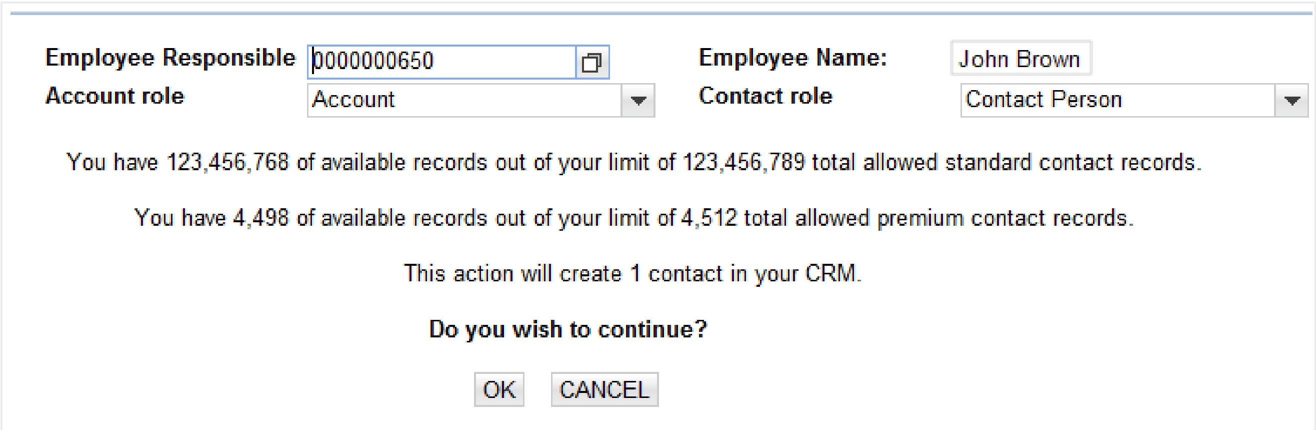
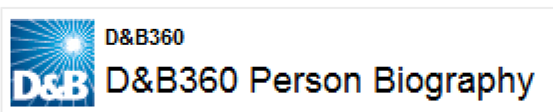
After you create or add a new contact, the **Confirmation Message to Create Contacts** window will open. Click **OK** to add this contact, or click **Cancel** if you do not want to add this record to your CRM.



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

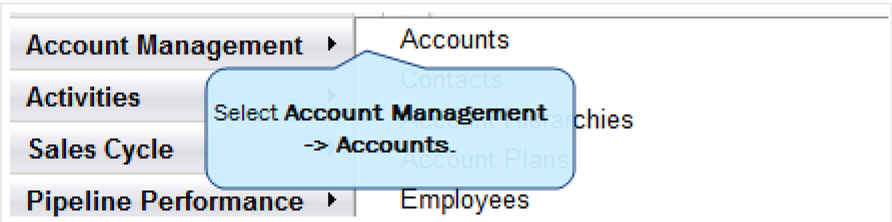
Leveraging ROW

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.

Adding a Contact from an Account Record

1. To list your existing accounts, on the left menu, select **Account Management**, and then select **Accounts**.



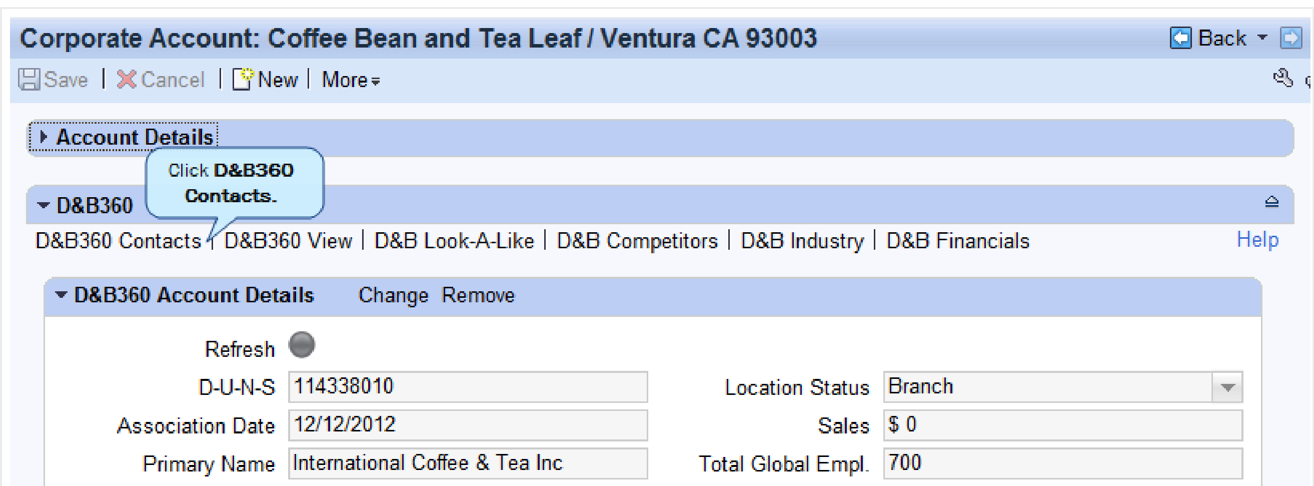
2. In the **Search** window, click **Search** to list your accounts.

   — or —

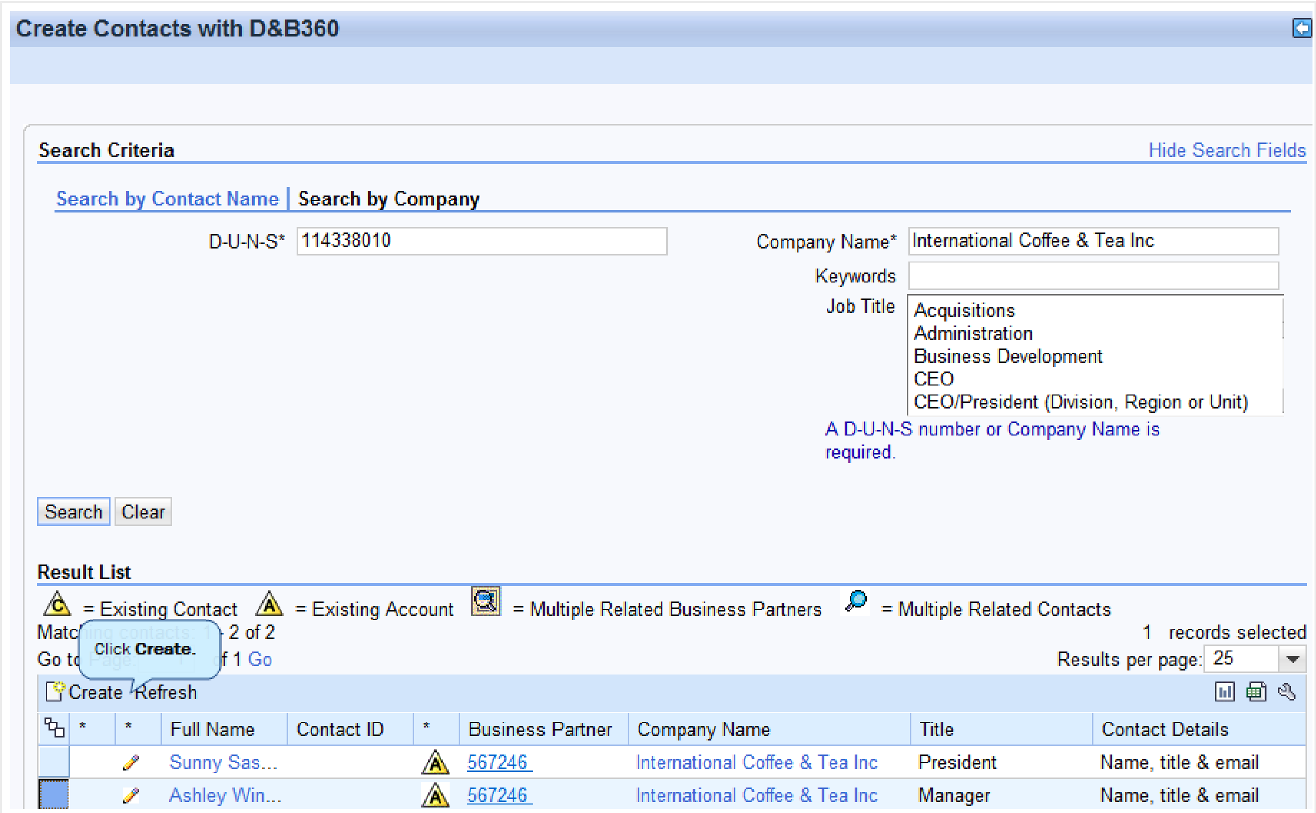
   In the **Search Criteria** area, complete the fields to find a specific account.

3. Select an account that you want to review for adding contacts.

4. In the **Corporate Account** window for that account, **D&B360** area, click **D&B360 Contacts**.

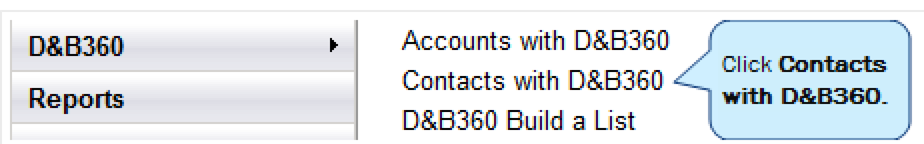


5. In the **Create Contacts with D&B360** window, **Result List**, click to select the contact that you want to add.



Adding a Contact from D&B360 Directly

1. From the left **D&B 360** menu, select **Contacts with D&B360**.

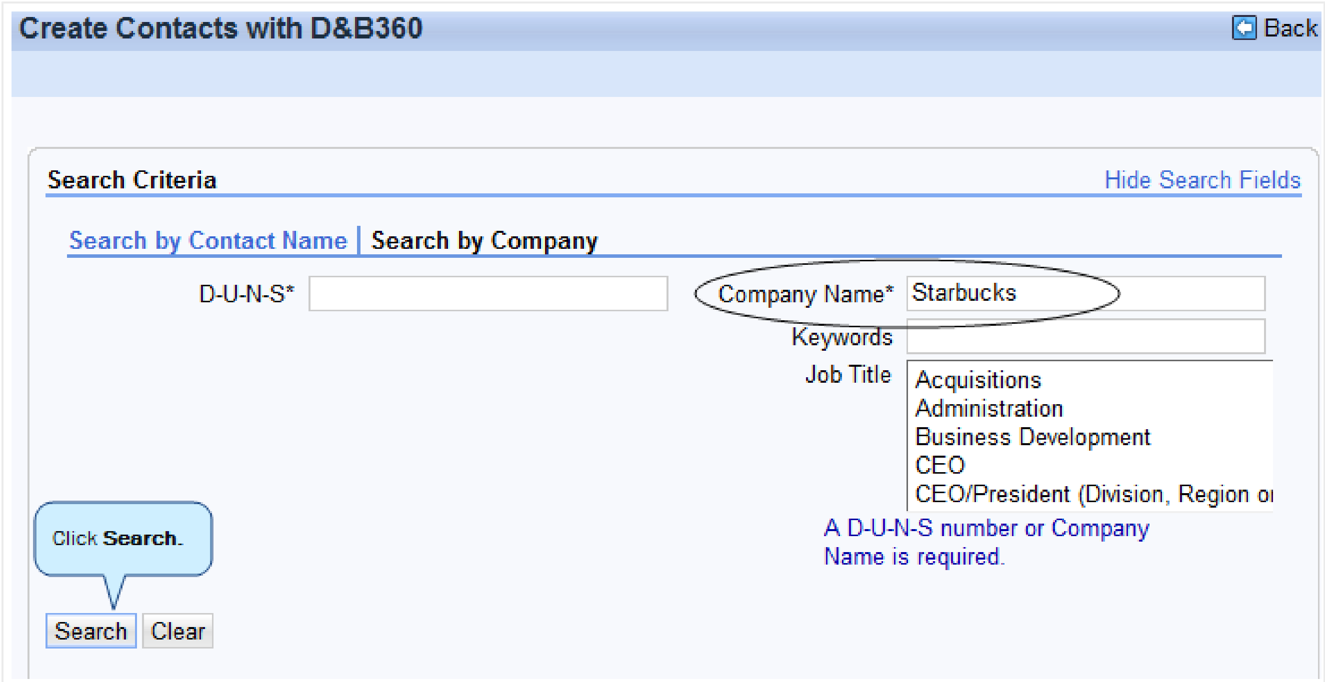


The **Create Contacts with D&B360** window opens.

2. In the **Create Contacts with D&B360** window, click **Search by Company** to specify a company name for your search.

3. In the **Company Name** field, type the name of the company or the D-U-N-S number as criteria for your search. You must enter at least one or the other to run the search.

4. Click **Search**.

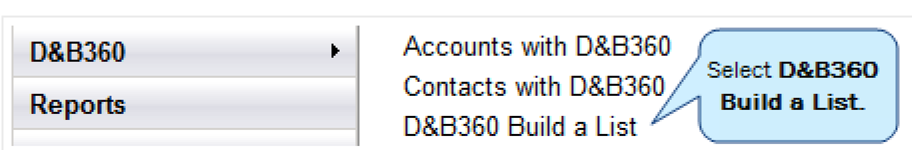


5. In the **Create Contacts with D&B360** window **Result List** area, select the blue box next to the contact you want to add, then click **Create**.

The **Create Contacts** window opens to show the status of your request. A yellow triangle indicates your request is in the queue. If the status does not change, you can click **Refresh**. A green box indicates the contact has been successfully added.

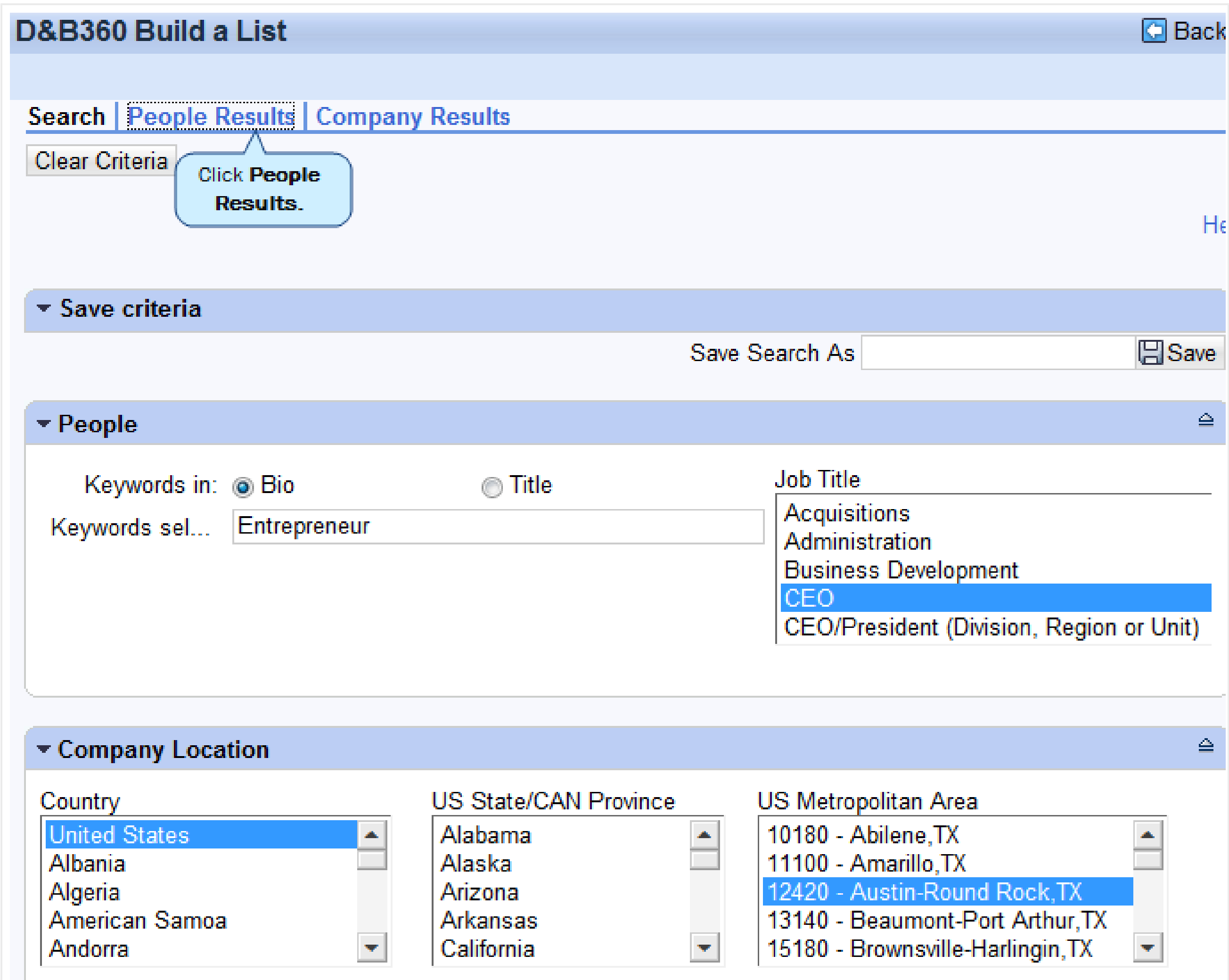
Adding a Contact Using Build-a-List

1. From the left **D&B 360** menu, click **D&B360 Build a List**.



The D&B360 Build a List window opens.

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



5. In the **D&B360 Build a List** window, **Create** column, click the box next to the candidate you want to create, and then click **Create**.

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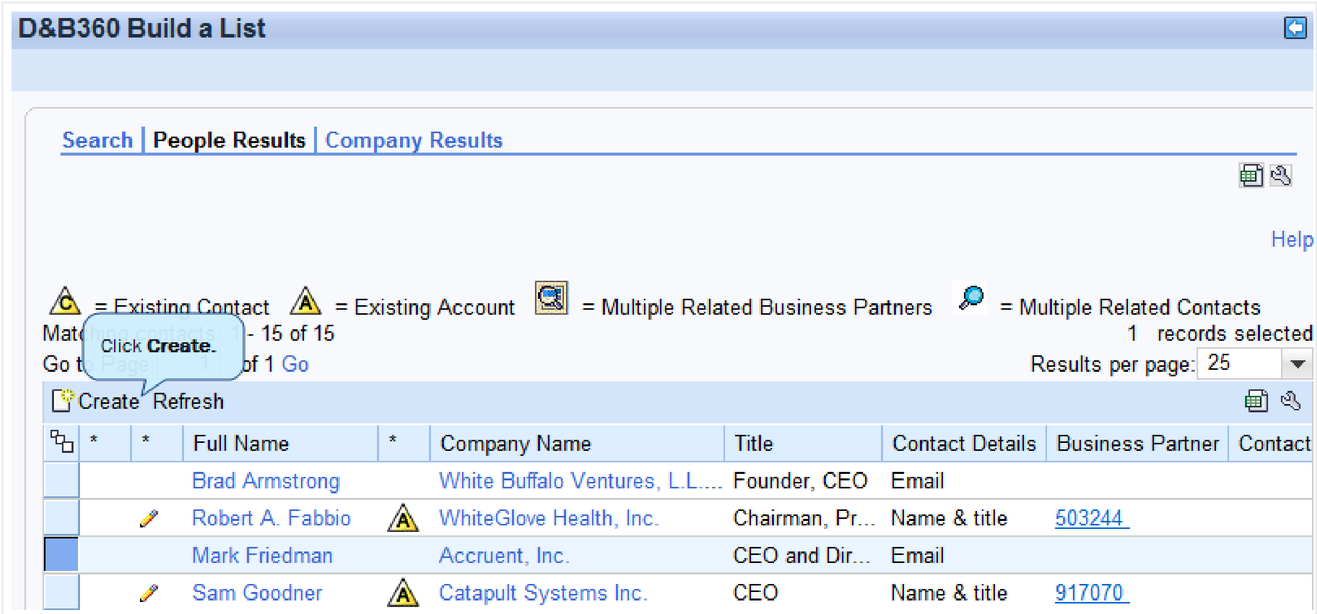
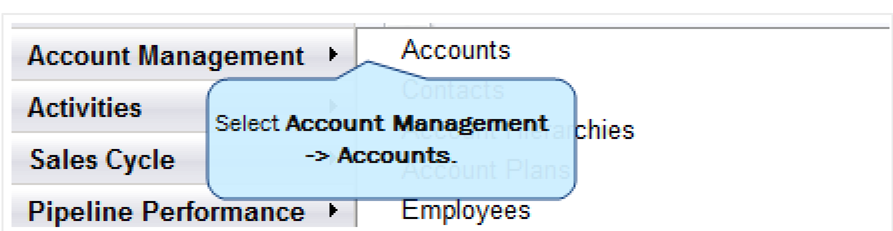


The **Create Contacts** window opens to show the status of your request. A yellow triangle indicates your request is in the queue. If the status does not change, you can click **Refresh**. A green box indicates the contact has been successfully added.

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 list your existing accounts, on the left menu, select **Account Management**, and then select **Accounts**.

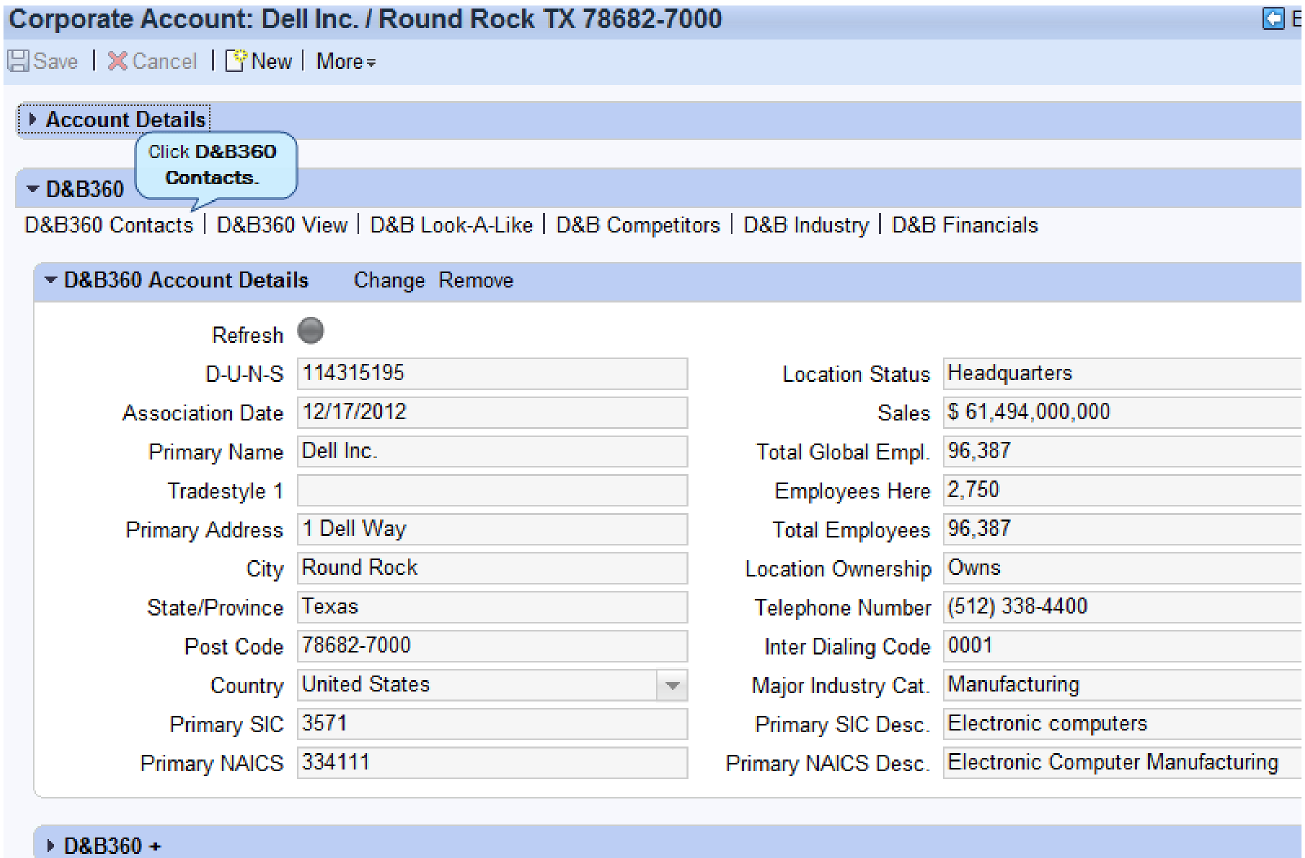


2. In the **Search** window, click **Search** to list your accounts.

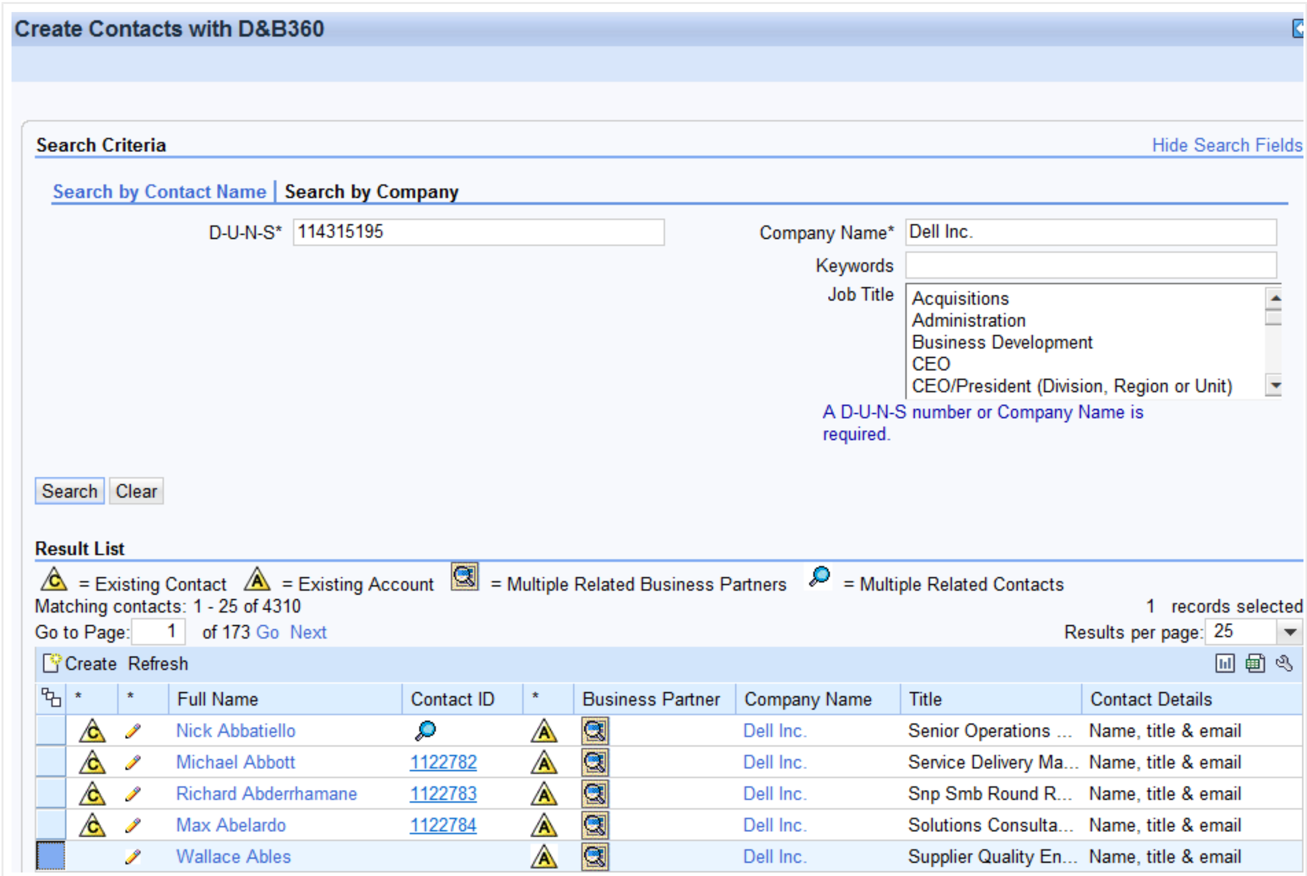
   — or —

   In the **Search Criteria** area, complete the fields to find a specific account.

3. Select the account you want to merge.
4. In the **Corporate Account** window, **D&B360** area, click **D&B360 Contacts**.



The **Create Contacts with D&B360**window opens and displays a list of contacts based on your search criteria.



Merging a Candidate

1. To merge a candidate from the list, click the pencil icon.

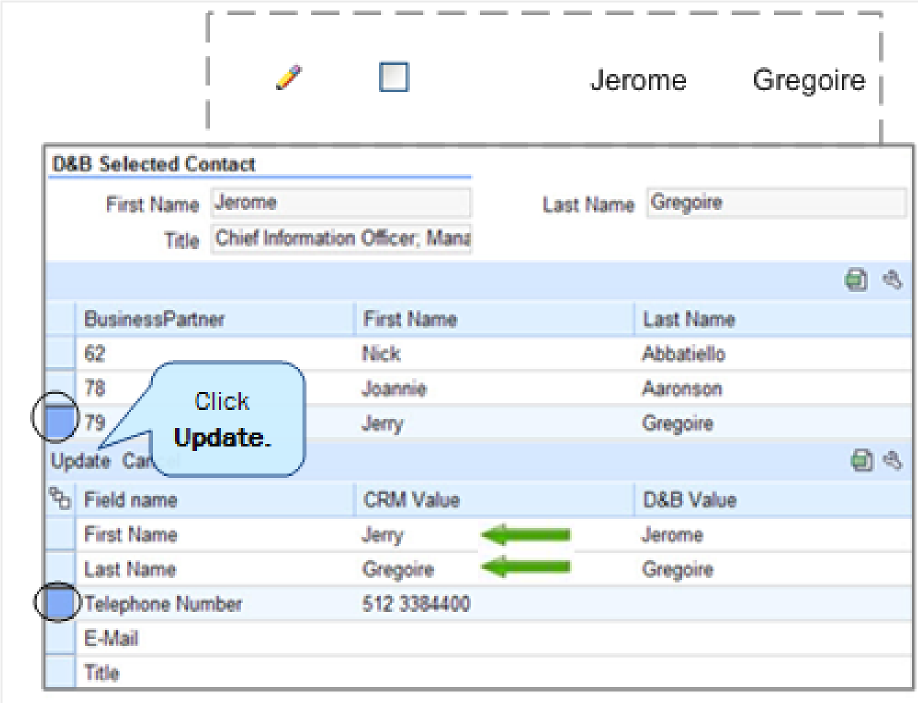
   The **D&B Selected Contact** window opens where you can decide if you want to merge this contact.

2. To merge this contact, click **Update**.

   — or —

3. If you decide not to merge this contact, click **Cancel**.

In the following example, the name *Jerome* is more formal than Jerry, so we clear that button. That way, the end result will be Jerome. We do not want the blank field to overwrite the phone number, so we clear that box. Then we click **Update**.


Jerome
Gregoire
D&B Selected Contact
First Name Jerome
Last Name Gregoire
Title Chief Information Officer; Mana
BusinessPartner
First Name
Last Name
62 Nick Abbatiello
78 Joannie Aaronson
79 Jerry Gregoire
Click Update.
Update
Field name
CRM Value
D&B Value
First Name Jerry Jerome
Last Name Gregoire Gregoire
Telephone Number 512 3384400
E-Mail
Title

6 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.

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.

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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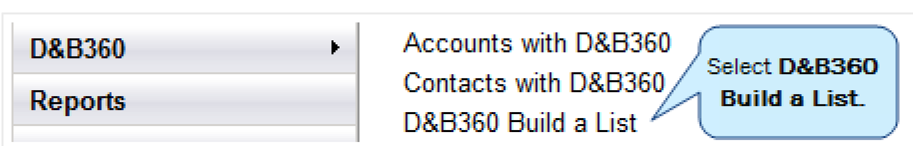
Company type	Public or Private (select form list)	Location Type (select Branch, Headquarters, or Single Location)
	Subsidiary Status (select from list)	Marketing Pre-screen (Select High, Medium, or Low)
FINANCIAL DATA		
— Key numbers	Assets — $ mil (From/To)	R&D Expense — $ mil (From/To)
	Ad Expenses — $ 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.

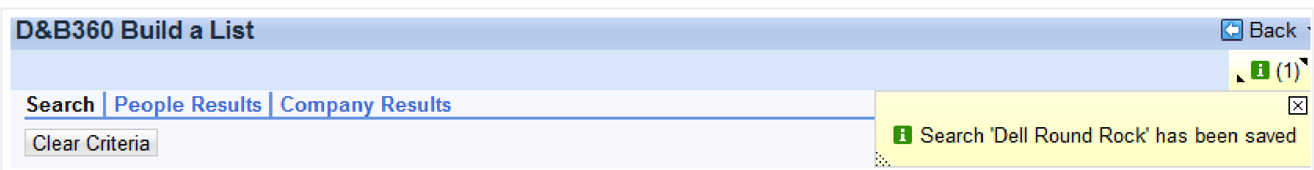
Saving Searches

1. From the left **D&B 360** menu, select **D&B360 Build A List**.



2. In the **D&B360 Build a List** window search areas, enter your search criteria.
3. In the **Save Search As** field, type the name of your search.
4. Click **Save**.

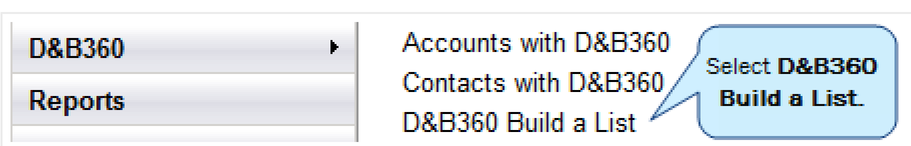
Your search is now saved, and you can use it again at a later time.



If you log off and want to go back and save your search, you can log back in, execute the search, and then save it. Your last search is preserved until you change it.

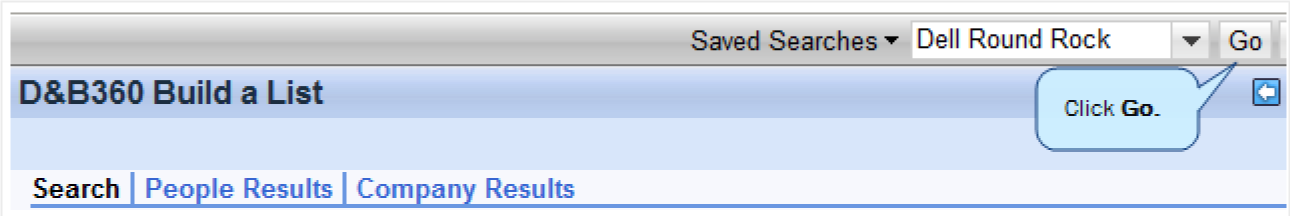
Using a Saved Search

1. From the left **D&B 360** menu, select **D&B360 Build A List**.



2. In the **D&B360 Build a List** window, **Saved Searches** field, use the menu to display all of your saved searches.

3. Select the saved search you want to open, and then click **Go**.

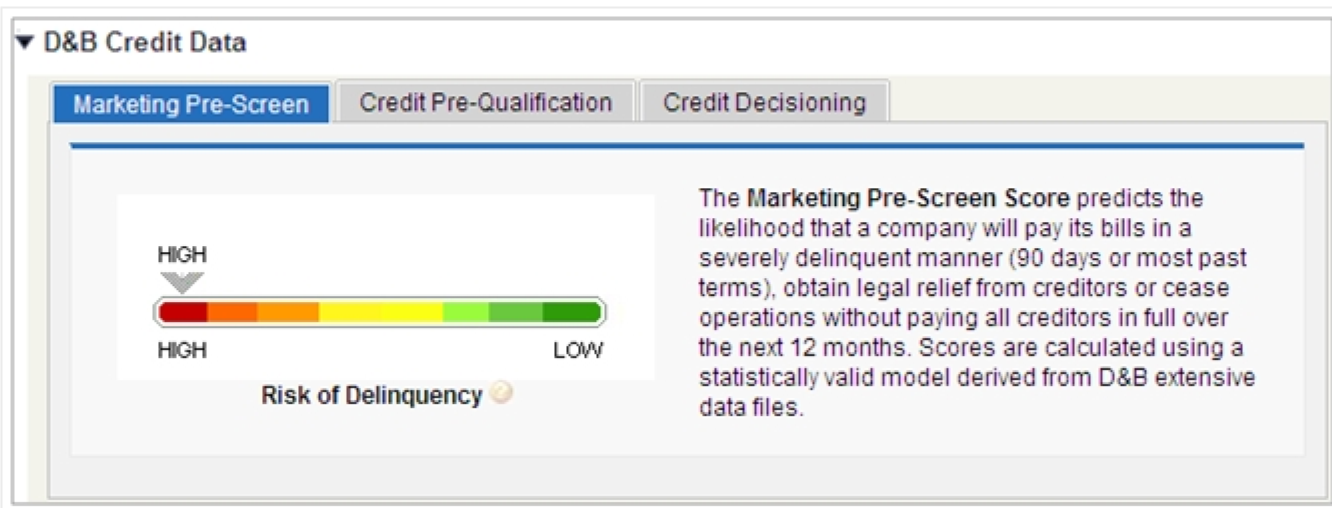


Your saved search opens.

D&B Credit Data

D&B360 gives you both valuable information right at your fingertips, and an easy-to-access process for retrieving not only D&B data, but additional information from the public sector.

When you first access the D&B Credit Data window, which includes comprehensive information, you will see a window with three tabs: Marketing Pre-Screen, Credit Pre-Qualification, and Credit Decisioning.



Credit Pre-Qualification and Credit Decisioning Tabs

These tabs contains multiple sections, which are shown in the following illustration. This feature is available for an additional charge. If your D&B360 application does not include these tabs, request that your administrator contact your D&B sales representative.

Add D&B Credit Data: Credit Pre-Qualification

- Commercial Credit Marketing Pre-Screen
- Financial Stress Marketing Pre-Screen
- D&B Rating Branch

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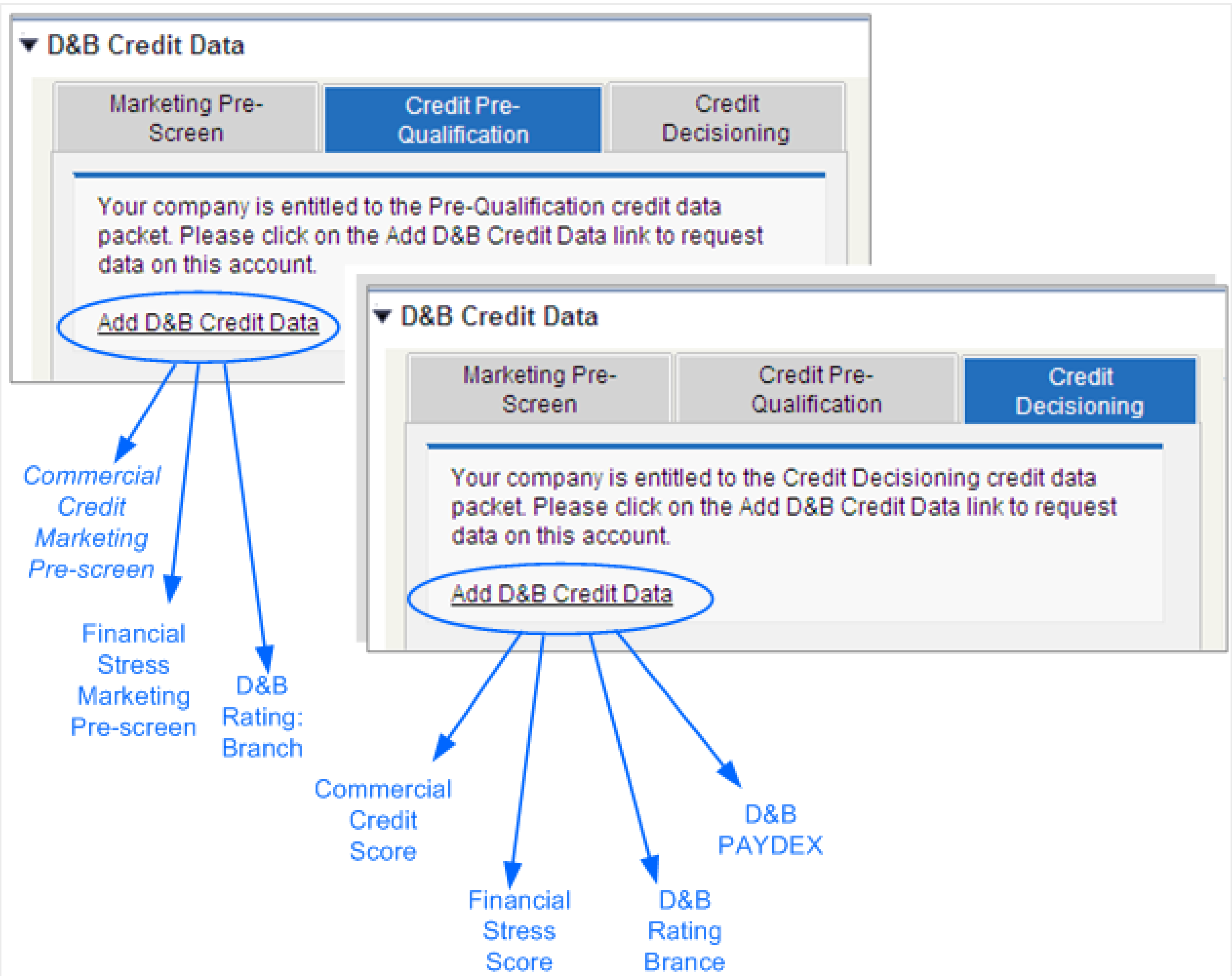
Add D&B Credit Data: Credit Decisioning

- Commercial Credit Score
- Financial Stress Score
- D&B Rating Branch
- D&B Paydex



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