

D&B360

User Guide

for Siebel CRM

Version 2.2

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

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

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



Contents

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

D&B Standard Options	2-5
D&B Standard Icons	2-6
3 Creating a New Account in D&B360	3-1
Creating a New Account Using Name and Address	3-2
Creating a D&B360 Account Based on a List of Criteria	3-4
Criteria Categories	3-6
Creating a D&B360 Account Based on Attributes of a Specific Account	3-6
Creating a D&B360 Account from Records Related to Existing Accounts	3-9
Reviewing Results when Searching by Family Tree Hierarchy	3-11
Creating a D&B360 Account from Competitors	3-12
4 Enriching Accounts with D&B360	4-1
Leveraging ROW	4-2
Adding D&B Data to an Existing Account	4-2
Identifying Related Accounts in D&B	4-5
Finding Industry Information about Existing Accounts	4-6
Displaying Industry Information	4-6
Adding an Industry Association	4-8
Leveraging Industry Information	4-9
Adding Financial Information to Existing Accounts	4-10
5 Adding Contacts with D&B360	5-1
Person Biographies	5-2
Leveraging ROW	5-2
Adding a Contact from an Account Record	5-3
Adding a Contact from D&B360 Directly	5-5

Adding a Contact Using Build-A-List	5-7
Merging Duplicated Contacts	5-9
6 Creating Opportunities with D&B360	6-1
Leveraging ROW	6-1
Creating a D&B360 Opportunity from a Contact	6-1
Creating an Opportunity from a Contact	6-2
Creating an Opportunity from a Contact using the Opportunities with D&B360 Menu	6-3
Creating an Opportunity from an Existing Account	6-5
Creating a D&B360 Opportunity Manually	6-7
Creating a D&B360 Opportunity Based on a List of Criteria	6-8
Creating a D&B360 Opportunity Based on Attributes of Specific Accounts	6-9
Creating a D&B360 Opportunity from a Competitor	6-11
7 Using Build a List	7-1
General Search Process	7-1
Specific Criteria Collected	7-2
Saving Searches	7-3
Using a Saved Search	7-4
Index	I



About this Guide

Audience and Purpose

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

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

Conventions

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

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

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

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

Navigating in the PDF

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

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

Related Documentation

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



1 Introduction to D&B360

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

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

Product Benefits

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



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

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

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

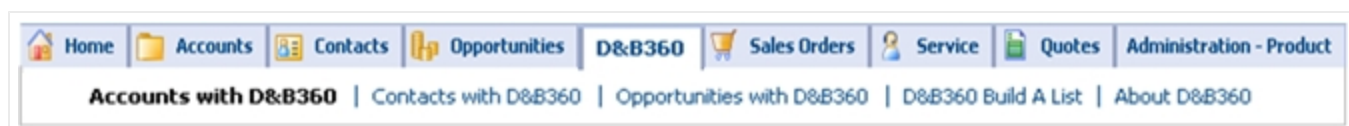
See New Opportunities	Seeing your customers and prospects in a new way can uncover new information and new-sale entry points.
Accelerate Your Sales Cycle	Once you establish relevance and credibility, customers will trust you with their business.
Expand Your Customer Footprint	Build customer relationships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

Guide Objectives

The D&B360 Administration and Installation Guide for Siebel 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 Siebel CRM, a new tab and 5 new links will display and provide access to new features and functions.



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

D&B360 Packages

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

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

Paid Subscriptions

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

Trial Subscriptions

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

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

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

Credit Consumption Rules

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

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

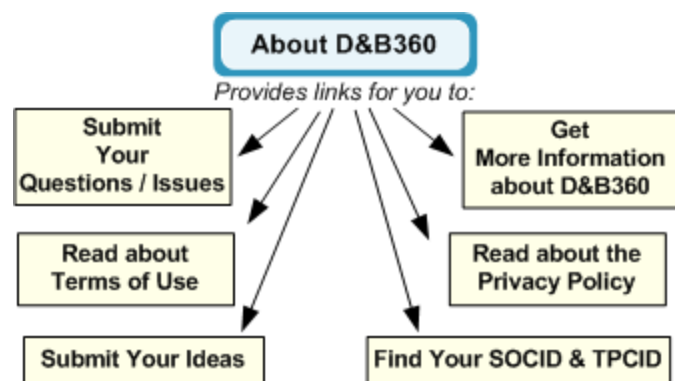
Type of Tracking	Description
Person Credit	<p>The contact credit limit represents the combined number of premium and non-premium D&B people that customers can import.</p> <p>For example, a user with a trial credit limit of 25 could import:</p> <ul style="list-style-type: none">• 20 premium and 5 non-premium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

2 Getting Started with D&B360

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

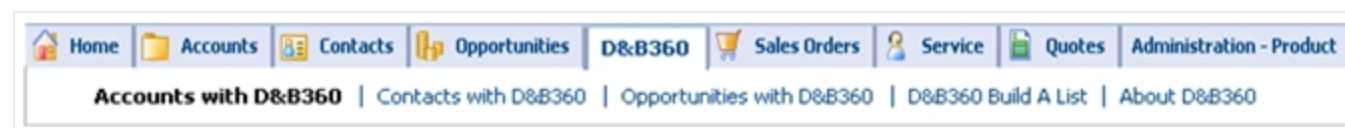
About D&B360

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



Accessing the D&B360 Window

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



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

The D&B360 menu options and icon links display. D&B360 displays as a new tab along the top menu, and remains on the top menu as you navigate through the CRM.

Using D&B360 Rest of World

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

The screenshot shows the 'D&B360 Rest of World' interface. At the top, there is a navigation bar with 'D&B360 Rest of World' on the left, 'Alerts' in the center, and 'OFF' and 'Manage Alerts' on the right. Below this is a 'Latest News' section with three news items:

- Interview: Deepak Giridharagopal on Puppet, Immutable Systems with PuppetDB** (InfoQ, 06-Feb-2014). A callout bubble points to the title with the text 'Click a link to open the story.'
- Dell Shows Proof-Of-Concept 64-Bit ARM Server** (Tech Week Europe, 06-Feb-2014).
- Dell's Latest Laptop Runs Windows 8, OSX** (The Digital Reader, 05-Feb-2014).

To the right of the news items is a 'Management Changes' section listing several executives:

- Thomas W Sweet** MOVED to Chief Financial Officer (24-Jan-2014)
- Brian Gladden**, Chief Financial Officer LEFT (24-Jan-2014)
- Bill Rodrigues** MOVED to President, North America (18-Nov-2013)
- Paul Henri Ferrand**, President LEFT (18-Nov-2013)
- Greg Davis** MOVED to Vice President of Software and Peripherals (18-Nov-2013)
- Steve Felice**, Chief Commercial Officer LEFT (15-Nov-2013)

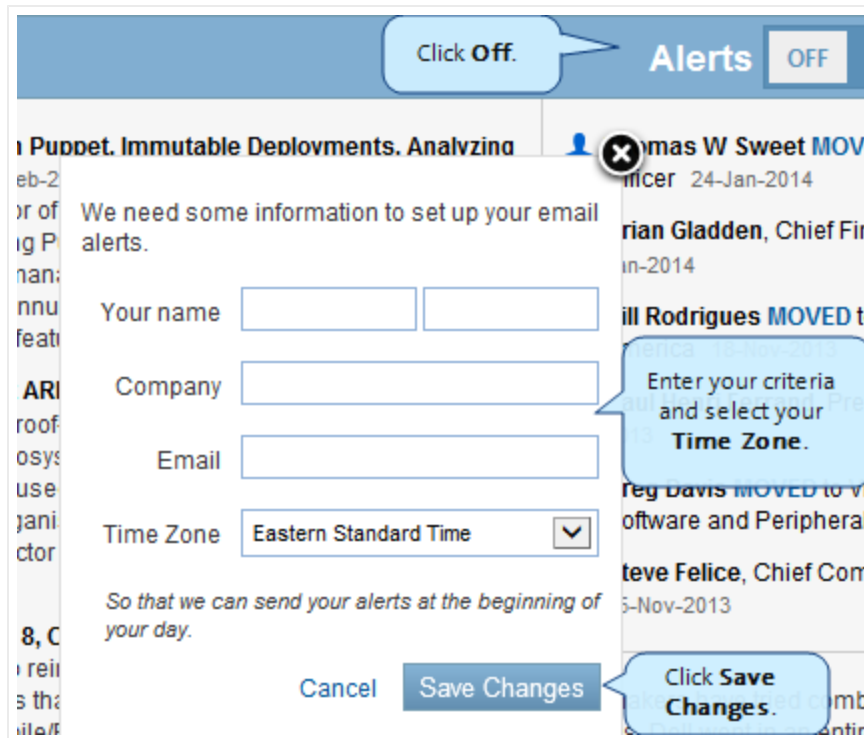
Setting Alerts

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

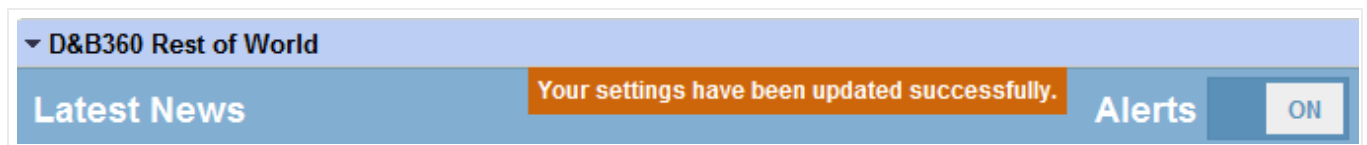
- On a D&B360 Account page, click **D&B360 Rest of World**.
- On the **D&B360 Rest of World** area, click **Alerts** to set up your email alerts.

This close-up screenshot shows the 'Alerts' button in the interface. The button is currently set to 'OFF'. A callout bubble points to the 'Alerts' text with the instruction 'Click Alerts.' To the right of the 'OFF' button is a 'Manage Alerts' link.

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**.

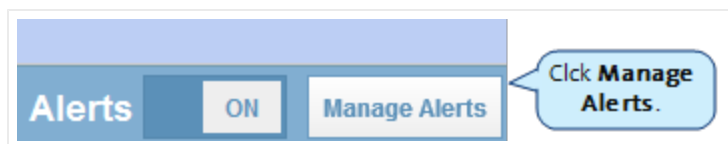


A message displays that your settings were updated, and the **Alerts** button changes to **ON**.



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**

▼ D&B360 Rest of World

← Back My Recent Alerts Manage My Alerts Manage My Company Triggers

powered by FirstRain

Your Alerts

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

Save Changes Cancel

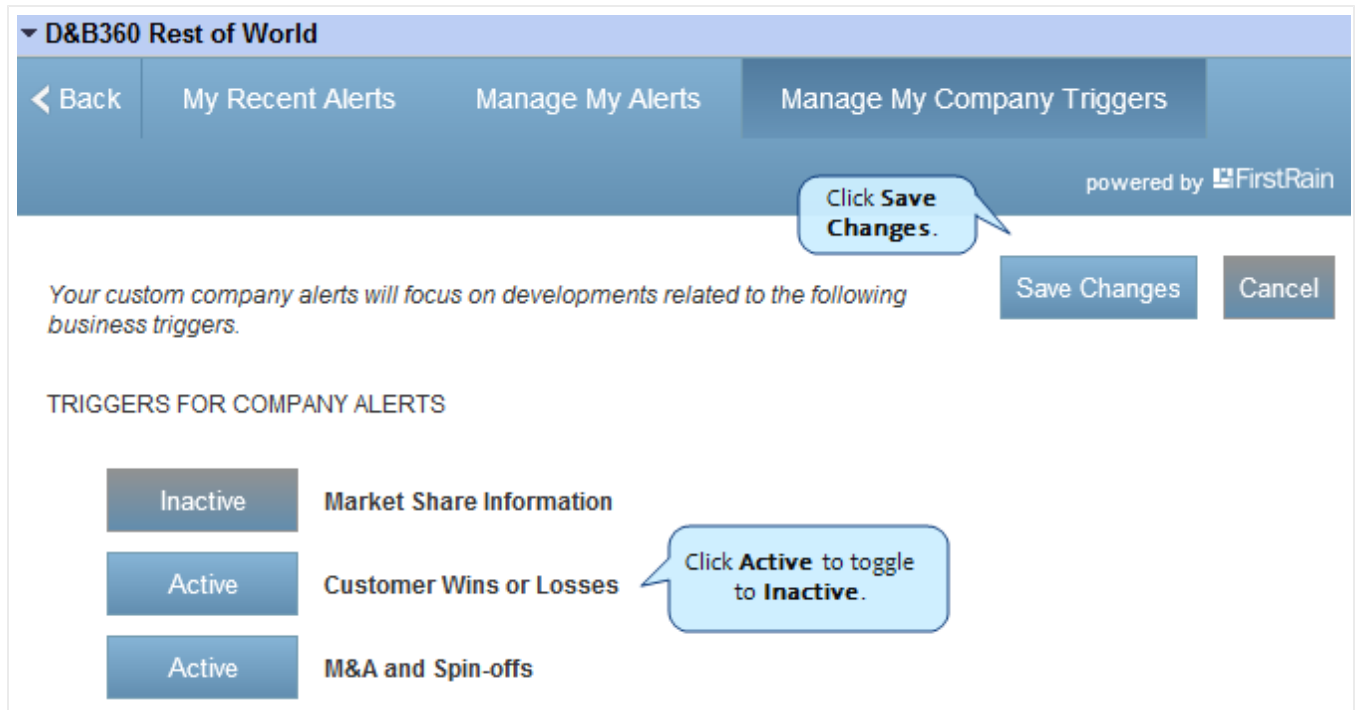
Subscribed Dell Inc.

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

Click **Save Changes**.

Save Changes Cancel

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



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, contact, and opportunity data) about an existing account, or to add D&B data to an account in your database that does not yet include D&B data.
D&B360 Refresh	Imports the most current D&B data for a specific account and performs a stare and compare for the data in the Account object compared to the D&B360 object.
D&B360+	Displays all of the D&B data licensed by the company for a specific account. Data is only for the company and does not include contact or lead/opportunity information.
D&B Contacts	Searches for contacts associated with a D-U-N-S Number or Company Name and create leads/opportunities or contacts from them.
D&B360 View	Identifies related accounts within your Account object. You can also bring in family members for cross-sell opportunities.

D&B Look-A-Like	Searches for other companies that have similar attributes to their best customers.
D&B Competitors	Accesses a list of competitors, assembled by D&B's editorial team, that are associated with a D-U-N-S Number or Company. You can use this list for creating accounts, contacts, or leads/opportunities.
D&B Industry	Searches for industry profiles associated with a D-U-N-S Number or Company to quickly gain powerful insight that accelerates the sales cycle. Industry profiles are powered by First Research industry experts
D&B Financials	Searches for additional financial data specific to your D&B360 accounts such as annual income statements, growth rates, per share data, and more associated with a D-U-N-S Number or Company.

D&B Standard Icons

Icon	Description
	The yellow circle indicates that you need to update or refresh the window.
	The gray circle indicates that you do not need to refresh the window
	The yellow warning triangle indicates that the account or contact already exists.
	The blue warning triangle displays only with Opportunities and indicates that an account already exists for the company referenced in that opportunity. Before you add a person as an opportunity, you can see if a person is already an opportunity for an account .
	Use the pencil icon to merge the details from a D&B Contact with a contact that has previously been set up.
	The green light indicates accounts that are considered a low risk of paying their bills in a delinquent manner over the next 90 days.
	The yellow light indicates accounts that are considered a medium risk of paying their bills in a delinquent manner over the next 90 days.
	The red light indicates accounts that are considered a high risk of paying their bills in a delinquent manner over the next 90 days.







3 Creating a New Account in D&B360

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

Creating a New Account Using Name and Address	3-2
Creating a D&B360 Account Based on a List of Criteria	3-4
Criteria Categories	3-6
Creating a D&B360 Account Based on Attributes of a Specific Account	3-6
Creating a D&B360 Account from Records Related to Existing Accounts	3-9
Reviewing Results when Searching by Family Tree Hierarchy	3-11
Creating a D&B360 Account from Competitors	3-12

Note the following:

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

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

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

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

The dialog box contains the following fields and text:

- Employee Respo...:** 0000000650
- Employee Name:** (empty field)
- Account role:** Account
- Text: This action will create 1 account record in your CRM.
- Text: Do you wish to continue?
- Buttons: OK, CANCEL

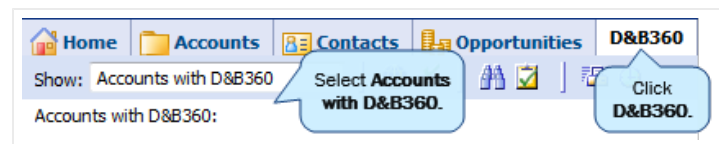
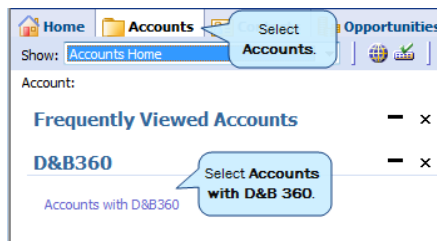
Creating a New Account Using Name and Address

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

- From the CRM menu select **Accounts**, and in the **D&B360** area, select **Accounts with D&B360**.

— or —

From the **D&B360** menu, select **Accounts with D&B360**.



- (Required) In the **Company Name** field, type the company name.
- (Required) In the **Country** and **State/Province** fields, use the menu to select the correct information.

Note: This field is required only if the country you select is the United States or Canada.

- (Optional) In the **City**, **Address**, **Phone**, and **Postal Code** fields, type this information if you have it.
- To display a list of candidates based on your search criteria, click **Search**.

D&B Account Search

Company Name*: Google
 City: Palo Alto
 Address:
 Phone:

Country*: United States
 State/Province**: California
 Postal Code:

Search Click Search.

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

The **D&B360 Account Results** window displays a list of candidates.

- To select the candidate that best matches your search criteria, select the appropriate row and click **Add**.

D&B360 Account Results

Matching Companies: 25

Actions	Match Info	Company Name	Address	City	State/Province	Country	Postal Code
Add	*****2413	★ GOOGLE INC.	1600 AMPHITHEATRE PKWY	MOUNTAIN VIEW	CA	US	94043-1351
Add	*****2210	GOOGLE INC.	260 IRIS WAY	PALO ALTO	CA	US	94303-3039
Add	*****786	GOOGLE INC.	167 HAMILTON AVE FL 2	PALO ALTO	CA	US	94301-1665
Add	*****809	GOOGLE INC.	1036 METRO CIR	PALO ALTO	CA	US	94303-3835
Add	*****9680	GOOGLE INC.	183 BRYANT ST	PALO ALTO	CA	US	94301-1104

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

★ 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 the following steps.

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

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

D&B Match Info

D&B Match Info

D-U-N-S: *****2809

Confidence Code (10-1) : 7

You Entered	D&B Matched
Google	GOOGLE+INC
	1036 METRO CIR
Palo Alto CA	PALO ALTO CA 943033835
US	US

D&B MatchGrade

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

D&B Match Profile

Matched to the Primary Business name
Entered data matched to the Current physical address

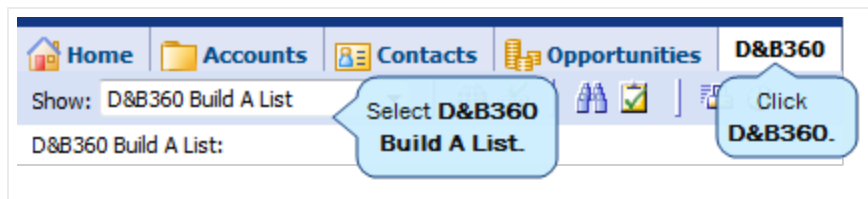
Ok

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.

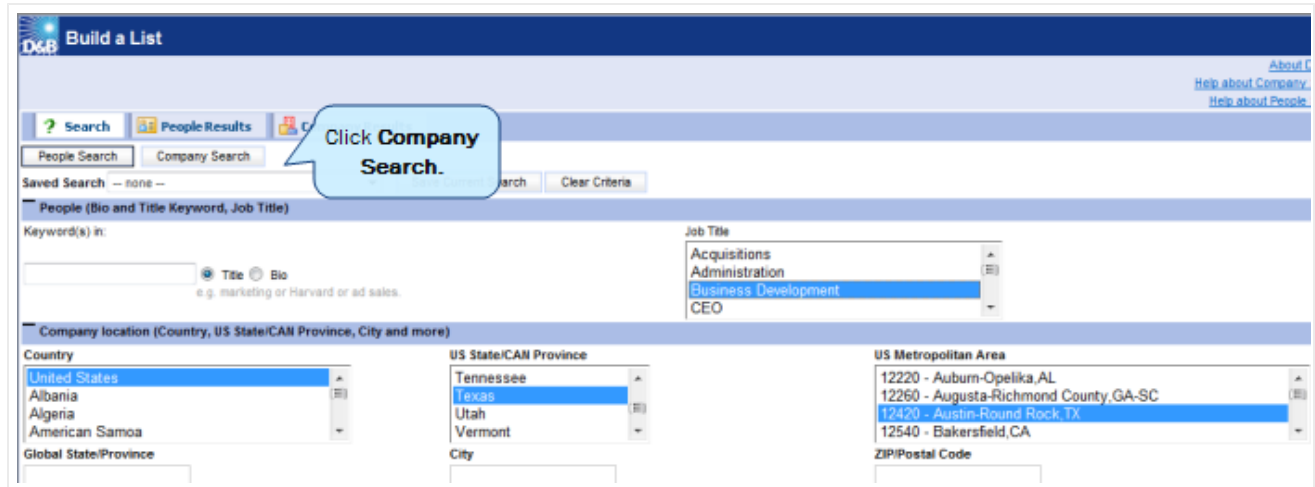
To complete the following steps, you must select an account that has D&B data. For more information about adding D&B data to an account that is already in your CRM, [see "Enriching Accounts with D&B360" on page 4-1.](#)

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



The **D&B360 Build A List** window opens and displays several categories of information, each of which provides specific criteria that you can select for your search. For more information about the criteria categories, see the end of this section. For this search, you won't use **People Search**.

2. Select the criteria for your search, then click **Company Search**.



The **D&B360 Company Results** window opens and displays a list of matching records.

3. Next to the account you want to use, click to select the check box.
4. To create the new account, click **Create**.



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

For more information about each of the categories, [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:

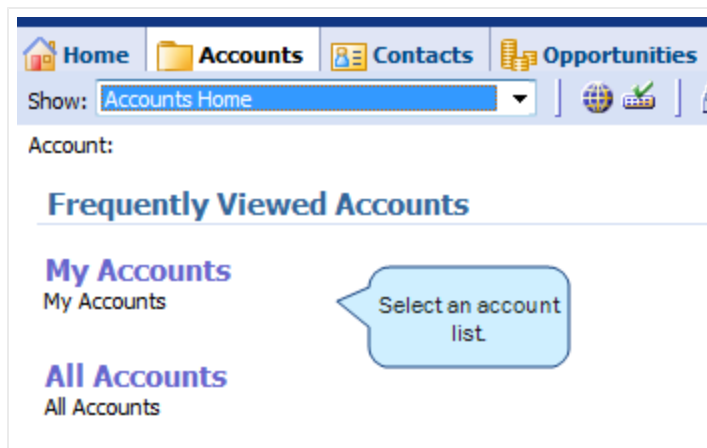
- [Company location](#)
- [Company size](#) (and more size criteria)
- [Industry](#)
- [Company type](#)
- [Financial data](#)
- [Key numbers](#)
- [US IPO data](#)
- [Special criteria](#)

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.

To complete the following steps, you must select an account that has D&B data. For more information about adding D&B data to an account that is already in your CRM, [see "Enriching Accounts with D&B360" on page 4-1.](#)

1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



2. In the list of accounts that display, select an account you want to pursue, or click one of the accounts in your **Recent Records** list.

The details for that account display.

3. Click **D&B Look-A-Like**.

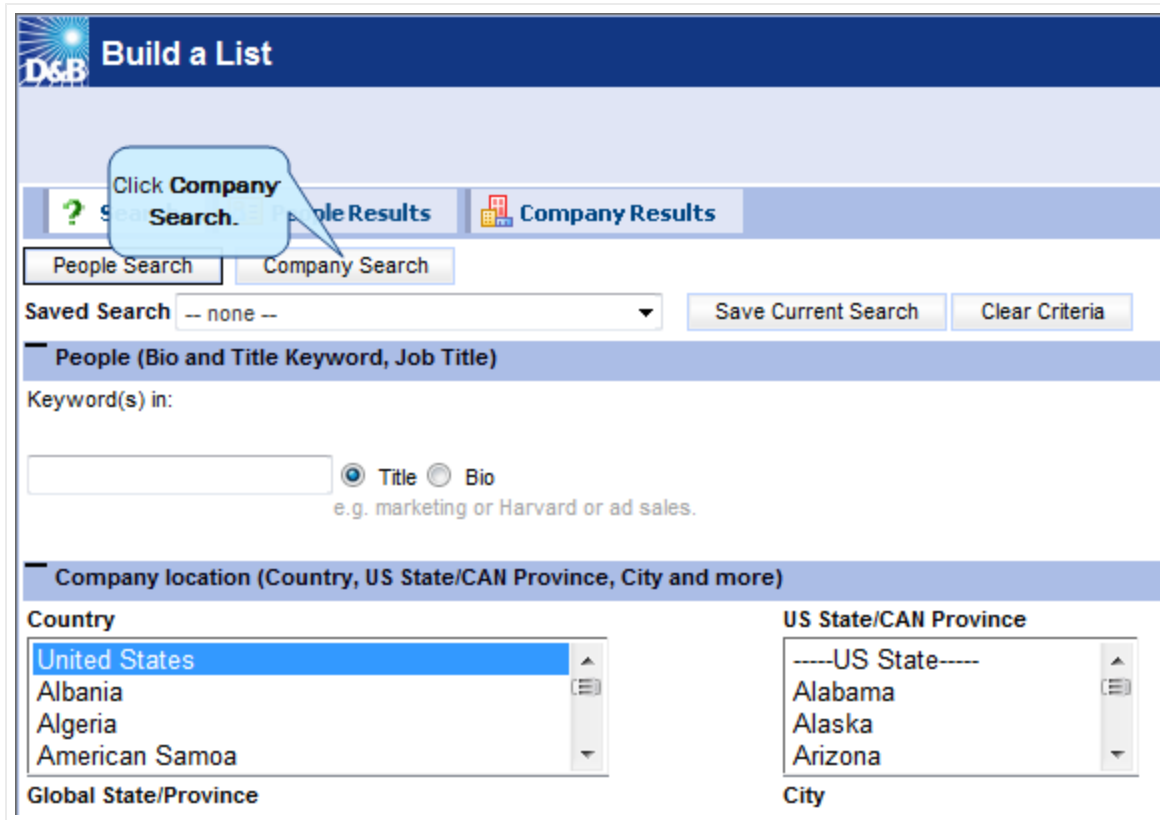
The screenshot shows the account details for "Siemens Industry, Inc". At the top, there is a "Menu" dropdown and buttons for "New", "Delete", "Save", and "Query". Below this, the account information is displayed in a grid-like format:

Account Name: *	Siemens Industry, Inc	Site:	014837808	Account Team:	SADMIN
Address:		State:		Main Phone #:	
City:		Country:		Fax #:	
Zip Code:				URL:	

Below the account details, there is a navigation bar with tabs: "More Info", "D&B360", "D&B360 Row", "D&B Credit", "Account Hierarchy", "Account Opportunities", and "Account Profile". The "D&B360" tab is selected. Below the navigation bar, there is a row of buttons: "Change", "Remove", "D&B360 Refresh", "D&B360 +", "D&B Contacts", "D&B360 View", "D&B Look-A-Like", and "D&B Competitors". A blue callout box points to the "D&B Look-A-Like" button with the text "Click D&B Look-A-Like."

The **D&B Build a List** window opens. Attributes of the original account you selected populate the search fields in this window, which you can use as criteria to search for similar accounts.

4. For the best search results, examine the populated fields and alter or add criteria.
5. Click **Company Search**.



The D&B360 Company Results window displays a list of companies that match your search criteria.

6. To select the account that you want to create, click the one that is similar to your original account.
7. 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.

You can also click the account to get more detailed information and click **Add** to create the account.

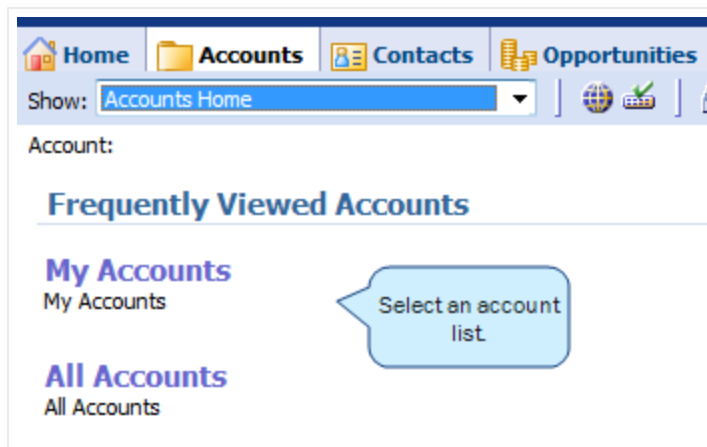
Summary Data	
D-U-N-S	*****5735
Primary Name	Professional Art & Electronics
Tradestyle1	Professional Electronics
Primary Address	29478 Ford Rd
City	Garden City
State/Province	Michigan
Post Code	48135-2318
Country	United States
Facsimile Number (Non-US only)	
Company Synopsis	Computer and software stores, nsk
Major Industry Category	Retail trade
Location Status	Headquarters
Year Started	2002
Mailing Address	
Mailing City	
Mailing State Name	
Mailing Zip Code	
Mailing Country	
Telephone	(734) 421-1641
International Dialing Code	0001
Location Ownership (owns/rents)	Leases

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.

To complete the following steps, you must select an account that has D&B data. For more information about adding D&B data to an account that is already in your CRM, [see "Enriching Accounts with D&B360" on page 4-1.](#)

1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



- From the list of accounts that display, select an account that you want to pursue, or click one of the accounts in your **Recent Records** list.

The details for that account display.

- From the **D&B360** menu, click **D&B360 View**.

"Siemens Industry, Inc"

Menu [New] [Delete] [Save] [Query]

Account Name: * "Siemens Industry, Inc" Site: 014837808 Account Team: SADMIN [v]

Address: [v] State: Main Phone #: []

City: Country: Fax #: []

Zip Code: URL: []

More Info **D&B360** D&B360 Row D&B Credit Account Hierarchy Account Opportunities Account Profile

Change Remove [] D&B360 Refresh D&B360 + D&B Contacts D&B360 View D&B Look-A-Like D&B Competitors

Click **D&B360 View**.

- In the **D&B360 View** window, click **Family Tree Query**.
- After the family tree information displays, click **Search**.

D&B 360 View

Account Detail

Go Back to Account Detail

Related Accounts Family Tree Query Family Tree Hierarchy

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

Account Name: Siemens Industry, Inc.
D-U-N-S: 014837808
Tree Levels: 2 [v]
Location: [v] Country of global Ultimate [v] Other Countries


Click **Search**.

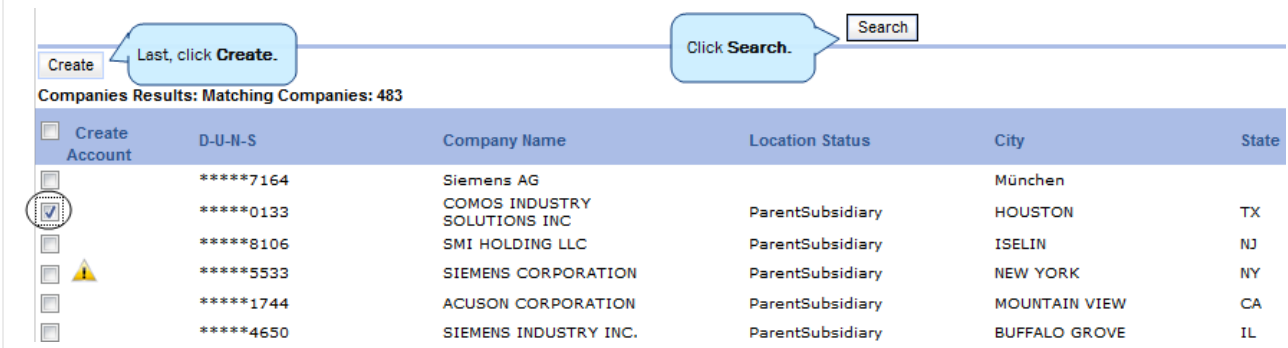
Search

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. 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 checkboxes.

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



Create Account	D-U-N-S	Company Name	Location Status	City	State
<input type="checkbox"/>	*****7164	Siemens AG		München	
<input checked="" type="checkbox"/>	*****0133	COMOS INDUSTRY SOLUTIONS INC	ParentSubsidiary	HOUSTON	TX
<input type="checkbox"/>	*****8106	SMI HOLDING LLC	ParentSubsidiary	ISELIN	NJ
<input type="checkbox"/>	*****5533	SIEMENS CORPORATION	ParentSubsidiary	NEW YORK	NY
<input type="checkbox"/>	*****1744	ACUSON CORPORATION	ParentSubsidiary	MOUNTAIN VIEW	CA
<input type="checkbox"/>	*****4650	SIEMENS INDUSTRY INC.	ParentSubsidiary	BUFFALO GROVE	IL

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.

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

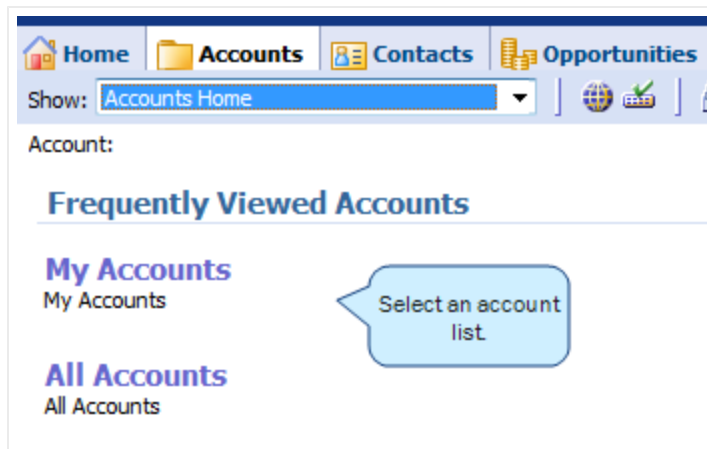
If a search result record is already in your database as an account, the duplicate account icon — a  — will display next to that account.

Creating a D&B360 Account from Competitors

Use this feature to identify the competitors to your accounts and then add them to your CRM for nurturing.

To complete the following steps, you must select an account that has D&B data. For more information about adding D&B data to an account that is already in your CRM, [see "Enriching Accounts with D&B360" on page 4-1.](#)

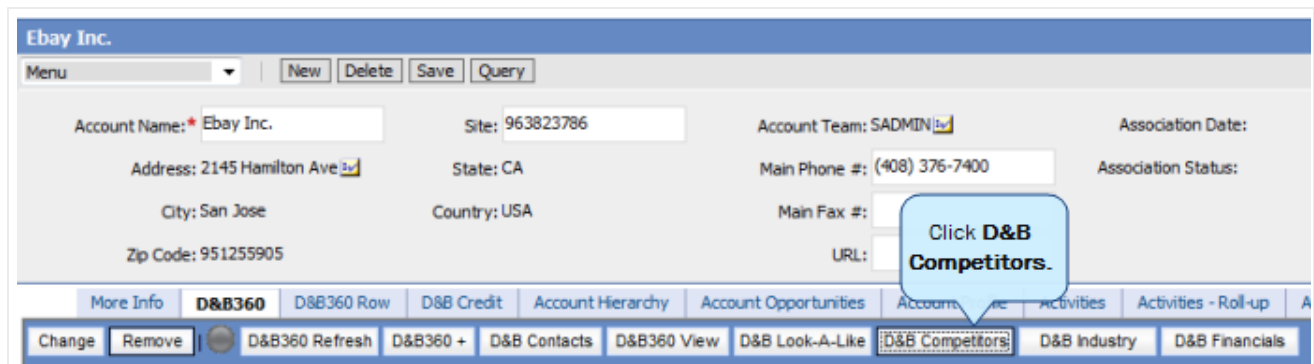
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



2. In the list of accounts that display, select an account you want to pursue, or select an account from your **Recent Records** list.

The details for your selected account display.


3. From the **D&B360** menu, click **D&B Competitors**.



Note: The D&B Competitors link is available only at the company Parent level, not the branch level. In the **Top Competitor** column, a green check mark displays next the business identified as being the top competitor to the account you selected.

A list of competitors displays for the company you searched on.

4. To add a company to your Accounts list, select the corresponding box next to the account.
5. Click **Create**.





Click Create.

Go Back to Detail About

Matching Companies: 20

Create 1 Records Selected

Create Account	D-U-N-S	Company	City	State/Province	Country	Annual Sales	Top Competitor
<input type="checkbox"/>	*****3454	Blast Radius Inc.	Vancouver	BC	Canada	\$31.97	
<input type="checkbox"/>	*****2342	Alibaba.com Limited	Hangzhou	Zhejiang	China	\$1,017.72	
<input type="checkbox"/>	*****8318	OnlineAuction.com	Grants Pass	OR	United States	\$0.23	
<input type="checkbox"/>	*****8416	Etsy, Inc.	Brooklyn	NY	United States	\$314.30	
<input type="checkbox"/> 	*****3773	Walmart.com USA, LLC	Brisbane	CA	United States	\$54.10	
<input type="checkbox"/>	*****4971	NextTag, Inc.	San Mateo	CA	United States	\$30.60	
<input type="checkbox"/>	*****9190	PriceGrabber.com, LLC	Los Angeles	CA	United States	\$67.80	
<input type="checkbox"/>	*****0178	AKQA, Inc.	San Francisco	CA	United States	\$67.80	
<input checked="" type="checkbox"/>	*****6280	Overstock.com, Inc.	Salt Lake City	UT	United States	\$1,054.28	

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.

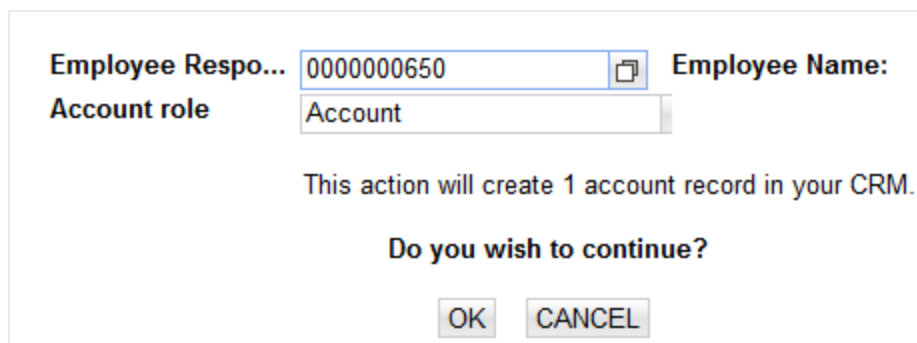
Leveraging ROW	4-2
Adding D&B Data to an Existing Account	4-2
Identifying Related Accounts in D&B	4-5
Finding Industry Information about Existing Accounts	4-6
Displaying Industry Information	4-6
Adding an Industry Association	4-8
Leveraging Industry Information	4-9
Adding Financial Information to Existing Accounts	4-10

Note the following:

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

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

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



The dialog box contains the following fields and text:

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

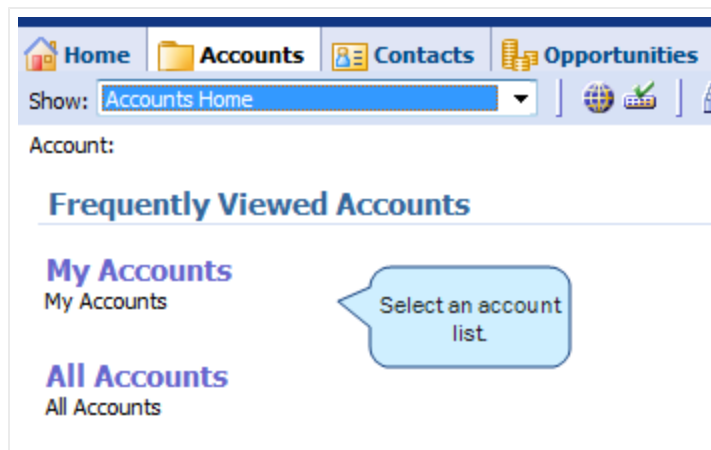
Leveraging ROW

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

Adding D&B Data to an Existing Account

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

1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



2. From the list of accounts that display, select an account that you want to add D&B data to. You can also click an account in your **Recent Accounts** list that needs D&B data.

The details for that account display.

3. Click **D&B360**.

Anue Systems, Inc.

Menu | New | Delete | Save | Query

Account Name: * Anue Systems, Inc. Site: 133872296

Address: 9737 Great Hills Trl # 200 State: TX

City: Austin Country: USA

Click **D&B360**

More Info | **D&B360** | D&B360 Row | D&B Credit | Account Hierarchy | Account Opportunities

4. Click **Add D&B Data**.

Anue

Menu | New | Delete | Save | Query

Account Name: * Anue Site:

Address: State:

City: Country:

Zip Code:

Click **Add D&B Data**

more info | **D&B360** | D&B360 Row | D&B Credit | Account Hierarchy

[Add D&B data](#)

The **D&B Account Search** area opens with the **Company Name** field already populated with the name of the company from your search.

5. In the **Country** and **State/Province** fields, which are required, use the drop-down menu to select the country and state for this company.
6. Type any other information you have about this company in the **City**, **Address**, **Postal Code**, and **Phone** fields.
7. Click **Search**.

D&B Account Search

D&B Account Search

Company Name*: Anue
 City: Austin
 Address:
 Phone:

Country*: United States
 State/Province*: Texas
 Postal Code:

Click Search. Search

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

The **D&B Account Search** window **D&B360 Account Results** area displays a list of companies.

- Locate the account you want to use, and click **Add**.

D&B Account Search

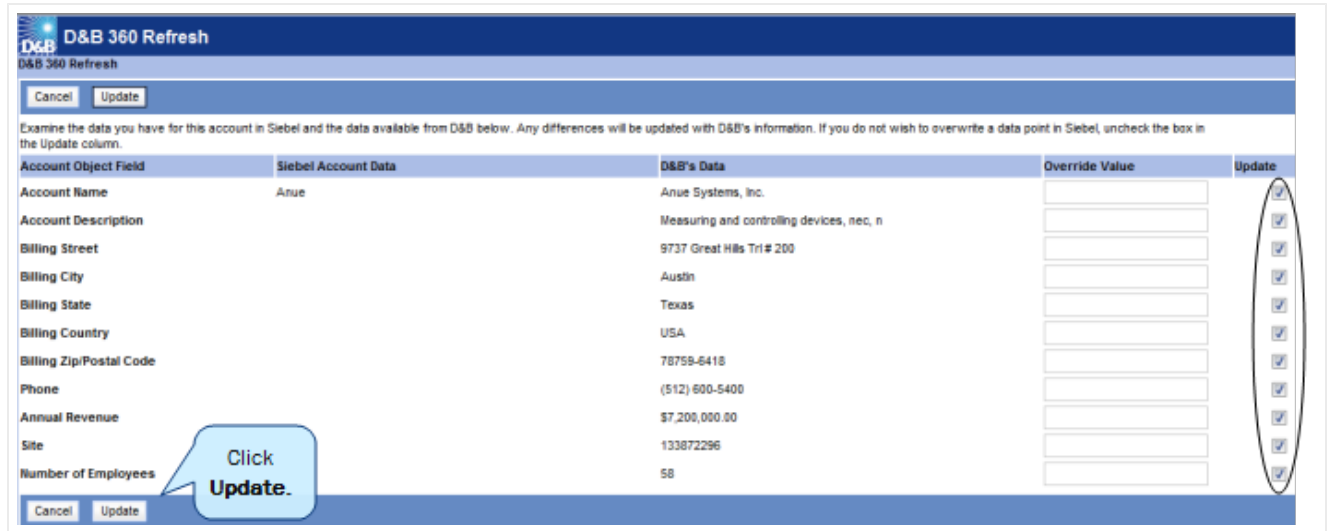
D&B360 Account Results

Matching Companies: 5

Actions	Match Info	Company Name	Address	City	State/Province	Country
Add	*****3621	★ ANUE TECHNOLOGY INC	1612 WHITE WILLOW LN	PEARLAND	TX	US
Add	*****2296	ANUE SYSTEMS, INC.	8310 N CAPITAL OF TEXAS HWY STE 300	AUSTIN	TX	US
Add	*****8530	ANUE SYSTEMS INC	3010 BRIAR OAK LN	ROUND ROCK	TX	US
Add	*****9940	ANUE YOUR HAIR & NAIL SALON	7037B SANGER AVE	WACO	TX	US
Add	*****1339	SYSCON US Also Trade as: ANDREW ANUE	305 BEACON HILL DR	ALLEN	TX	US

Click Add.

- In the **D&B360 Refresh** window, examine the data you have for this account in Siebel and the data available from D&B. Any differences will be updated with D&B's information. To prevent overwriting any data in Siebel, in the **Update** column, clear the check mark for the data you do not want updated.

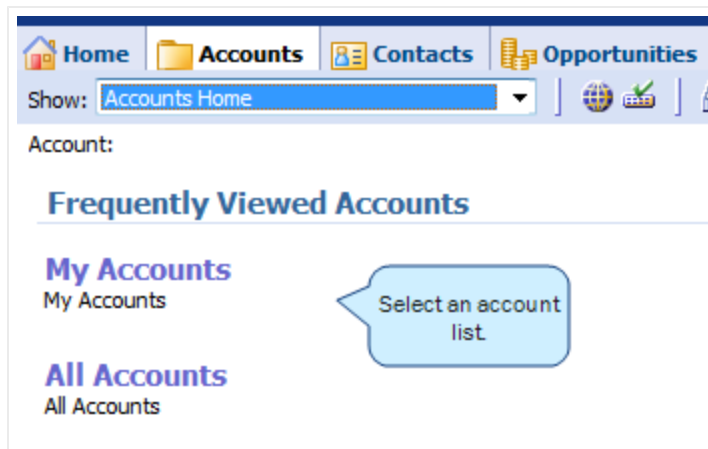


10. To update your account with the selected D&B data, click **Update**.

Identifying Related Accounts in D&B

To complete the following steps, you must select an account that has D&B data. For more information about adding D&B data to an account that is already in your CRM, [see "Enriching Accounts with D&B360" on page 4-1.](#)

1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



2. From the list of accounts that display, select an account that you want to pursue. You can also click an account in your **Recent Accounts**.

The details for that account display.

3. From the **D&B360** menu, click **D&B360 View**.

Coffee Partners Hawaii

Menu [v] [New] [Delete] [Save] [Query]

Account Name: Coffee Partners Hawaii Site: 960003697 Account Team: SADMIN [v]

Address: 210 Ward Ave Ste 105 [v] State: HI Main Phone #: (808) 545-1149

City: Honolulu Country: USA Main Fax #: [v]

Zip Code: 968144000 URL: [v]

More Info **D&B360** D&B360 Row D&B Credit Account Opportunities Account Profile Activities Ac

Change Remove D&B360 Refresh D&B360 + D&B Contacts **D&B360 View** D&B Look-A-Like D&B Competitors D&B Industry

The **D&B360 View** window opens and displays a list of Related Accounts.

D&B 360 View

Account Detail

Go Back to Account Detail

Related Accounts Family Tree Query Family Tree Hierarchy

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

Global Ultimate Name: Starbucks Corporation
Global Ultimate D-U-N-S: 155366107

D-U-N-S	Account Name	State	Active Opportunities	Closed Opportunities	Account Owner	Risk Level*
155366107	Starbucks Corporation	Washington	0	0	SADMIN	Green
833264542	Seattle Coffee Company	Washington	0	0	SADMIN	Yellow
879343580	Tazo Tea Company	Oregon	0	0	SADMIN	Yellow
960003697	Coffee Partners Hawaii	Hawaii	0	0	SADMIN	Green

* Available on US based companies only.

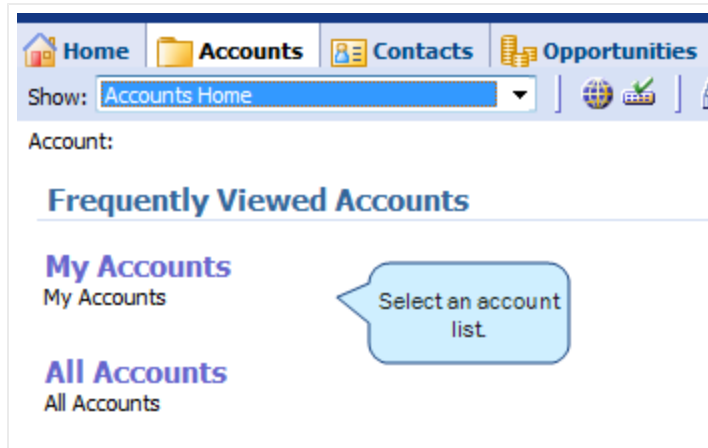
- To become more familiar with the data, find a specific related account, or to prepare to add one of the listed accounts as a new account, review the data in this window. Green, yellow, and red icons next to an account indicate its risk level, ([see "Identifying D&B360 Standard Options and Icons" on page 2-5.](#))

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 the business challenges and opportunities of a specific industry, you can quickly gain important knowledge and insight. Each D&B360 account is mapped to related industries through their SIC code.

Displaying Industry Information

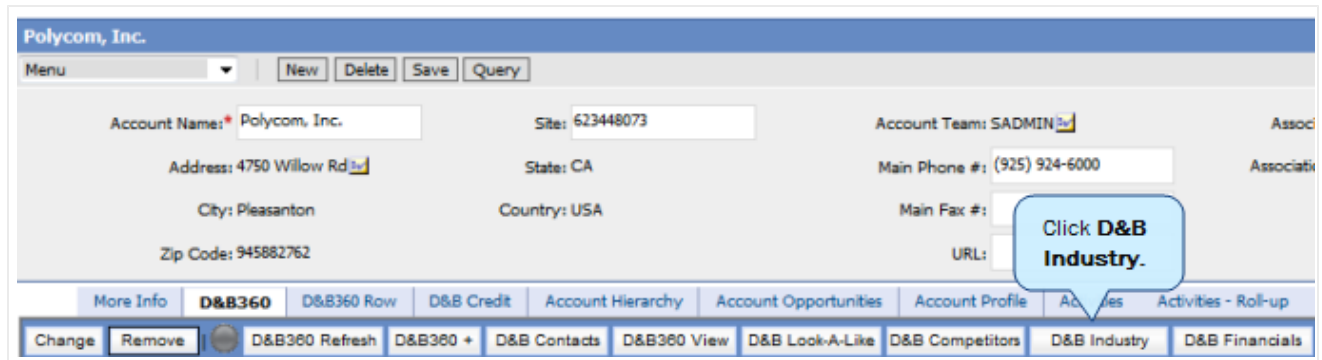
- From the **Accounts** menu, select **All Accounts** or **My Accounts**.



- From the list of accounts that display, select an account for which you want to add D&B Industry data. You can also click an account in your **Recent Accounts** list.

The details for that account display.

- From the **D&B360** menu, click **D&B Industry**.



The **D&B Industry Details** window for the account you selected opens. You will see a list of the industries provided by First Research that are mapped to this account through their SIC code.

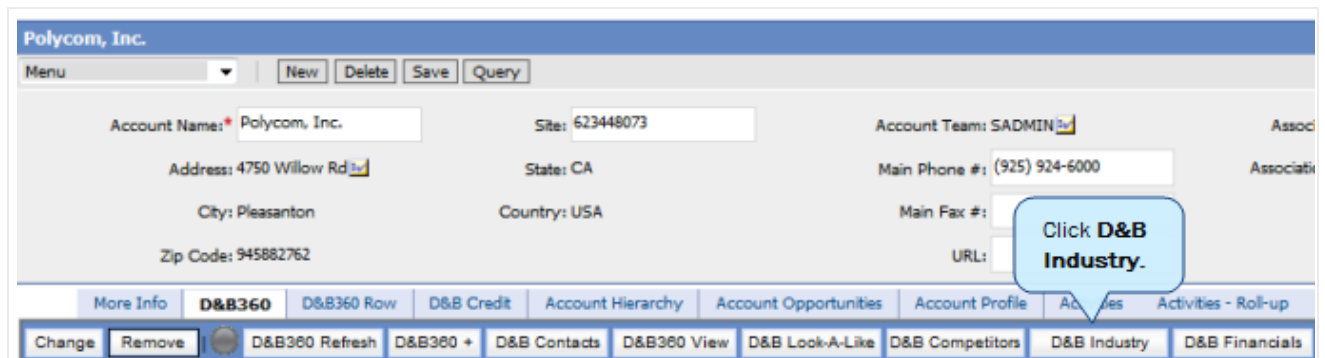
- To view comprehensive information about any topic, in the **Industry Detail** column click the topic link.



Adding an Industry Association

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

1. To display a list of industries associated with this account, from the **D&B360** menu click **D&B Industry**.



2. To open the D&B Industry Search window, click **Add Industry**.



- In the **D&B Industry Search** window, type a **Keyword**, **SIC** number, or **NAICS** number and click the corresponding radio button to the right.
- Click **Search**.

D&B Industry Search powered by First Research

Go Back to D&B Industry

video conferencing

Search by: Keyword SIC NAICS Search

Search for SIC or NAICS code

Click **Search**.

- Next to the industries that you want to associate with this account, click to select the type of industry in the **Industry Detail** column.
- Click **Associate**.

D&B Industry Search powered by First Research

Go Back to D&B Industry

video conferencing

Search by: Keyword SIC NAICS Search

Search for SIC or NAICS code

Click **Associate**.

<input type="checkbox"/>	Industry Code	Industry Detail
<input type="checkbox"/>	1141	Messaging, Conferencing & Communications Software design, develop, publish, and support software for transmitting, receiving, or processing a variety of communications, including this industry include applications for text messaging, instant messaging for intranets, IP phones, paging, video conferencing, Teleconferencing Services Providers
<input checked="" type="checkbox"/>	1588	provide teleconferencing, video conferencing, Web conferencing, and related services. Such services are typically operated, service providers and rely on fixed-line voice services, Internet, or cellular technologies for transmission. Common uses of tel as casual and social communication.
<input type="checkbox"/>	1576	Videoconferencing Equipment Manufacturing manufacture switching, transmission, and recording equipment for videoconferencing networks. Products include video phon Customers can include corporate enterprises, government agencies, educational institutions, consumers, and original equipr
<input type="checkbox"/>	1565	Telecommunications Equipment Manufacturing equipment for long-distance, local, and corporate telecommunications networks.
<input type="checkbox"/>	1121	Computer Software systems and application software used in personal computers, servers, embedded systems, and mobile devices.
<input type="checkbox"/>	1572	Wired Telecommunications Equipment Manufacturing manufacture wireline telecommunications networking equipment. Products include switching and transmission equipment (c

Associate

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

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

Leveraging Industry Information

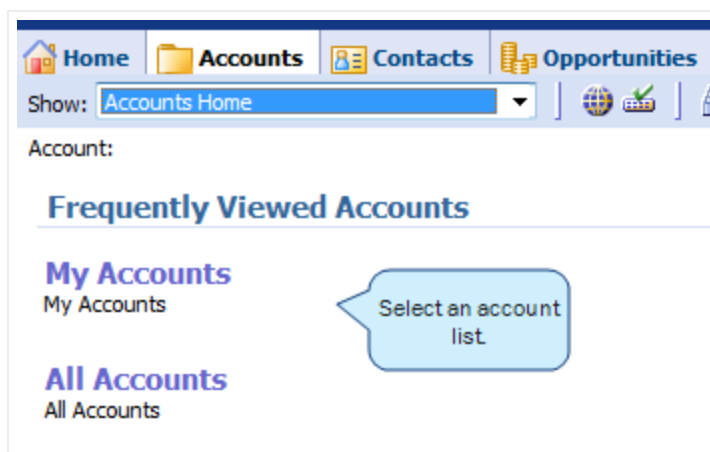
D&B Industry Information from First Research provides Sales and Marketing users with deeper insight about industry drivers and how these might affect a company. The information available includes:

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

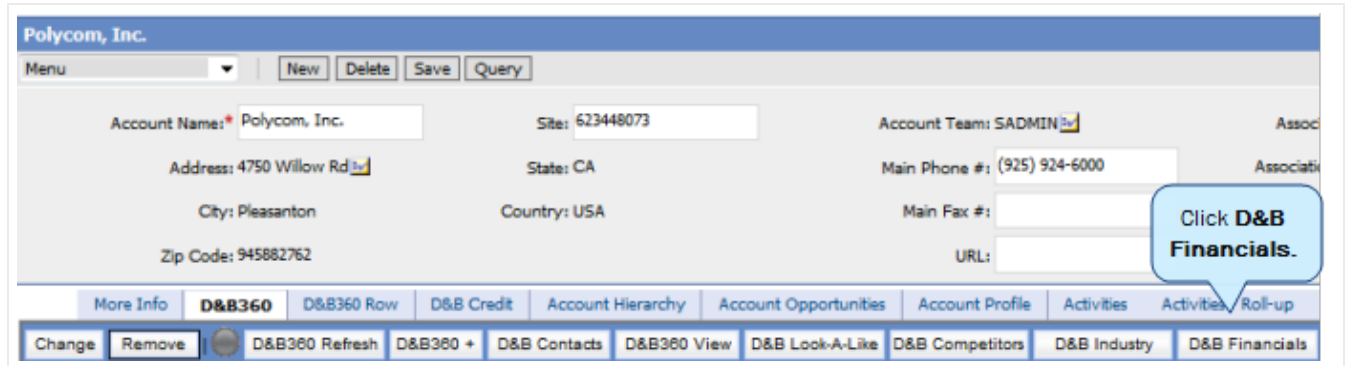
Adding Financial Information to Existing Accounts

To complete the following steps, you must select an account that has D&B data. For more information about adding D&B data to an account that is already in your CRM, [see "Enriching Accounts with D&B360" on page 4-1.](#)

1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.

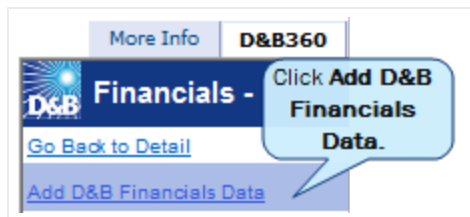


2. From the list of accounts that display, select an account for which you want to add D&B Financial data. You can also click an account in your **Recent Accounts** list.
The details for that account display.
3. From the **D&B360** menu, click **D&B Financials**.



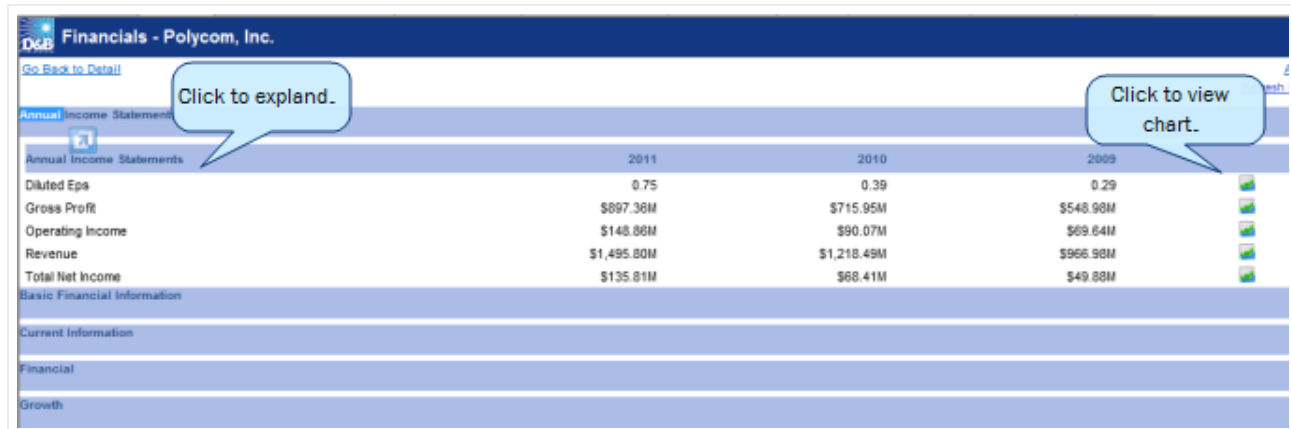
The amount of financial data available varies by company.

5. If the **D&B Financials Data** area does not display the financials data, click **Add D&B Financials Data**.



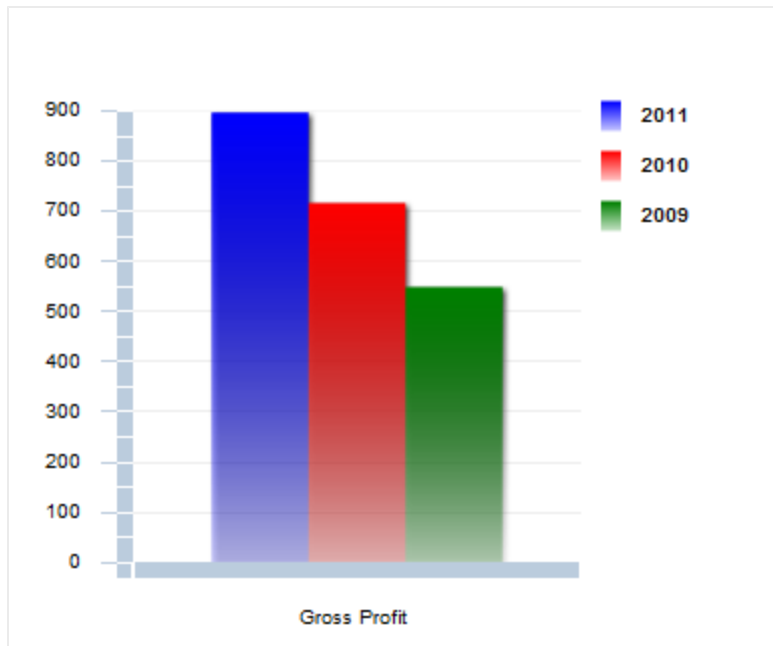
The **D&B Financials** information displays for the account you selected.

6. To drill farther down in the available information, click any of the categories.



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

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








5 Adding Contacts with D&B360

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

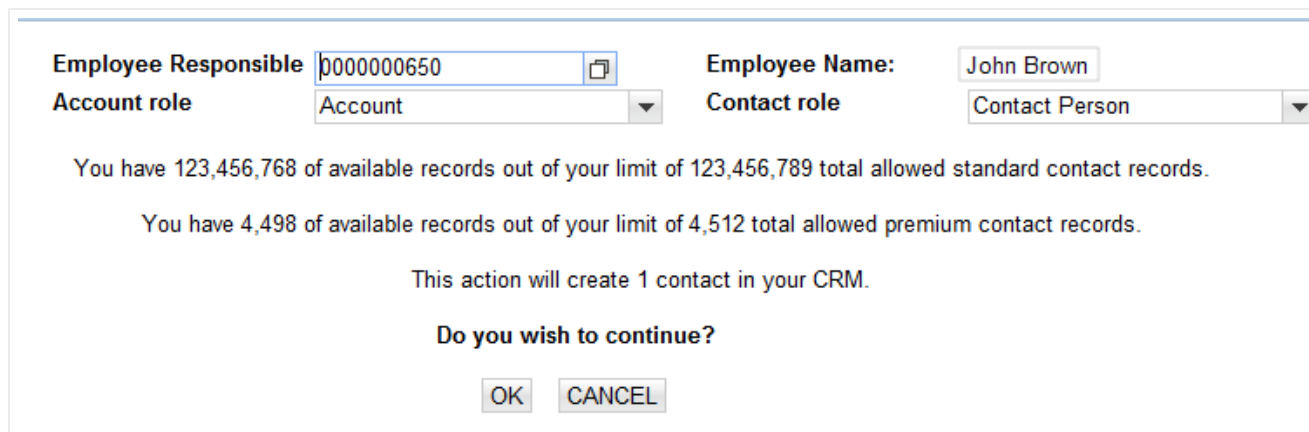
Person Biographies	5-2
Leveraging ROW	5-2
Adding a Contact from an Account Record	5-3
Adding a Contact from D&B360 Directly	5-5
Adding a Contact Using Build-A-List	5-7
Merging Duplicated Contacts	5-9

Note the following:

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

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

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



The dialog box contains the following information:

Employee Responsible	0000000650	Employee Name:	John Brown
Account role	Account	Contact role	Contact Person

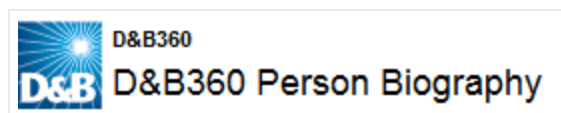
You have 123,456,768 of available records out of your limit of 123,456,789 total allowed standard contact records.

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

This action will create 1 contact in your CRM.

Do you wish to continue?

Person Biographies



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

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

Leveraging ROW

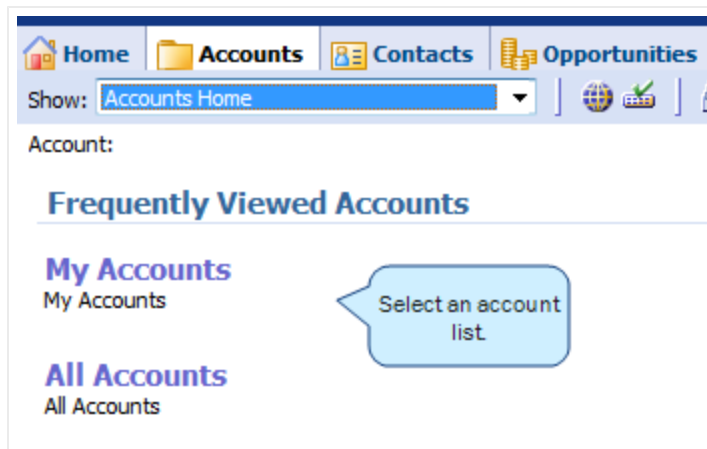
You can use Rest of World (ROW) as an information source for news about a company and link to news stories directly from the windows where you are working. For more information, [see "Leveraging ROW" on page 5-2](#).

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

Adding a Contact from an Account Record

To complete the following steps, you must select an account that has D&B data. For more information about adding D&B data to an account that is already in your CRM, [see "Enriching Accounts with D&B360" on page 4-1.](#)

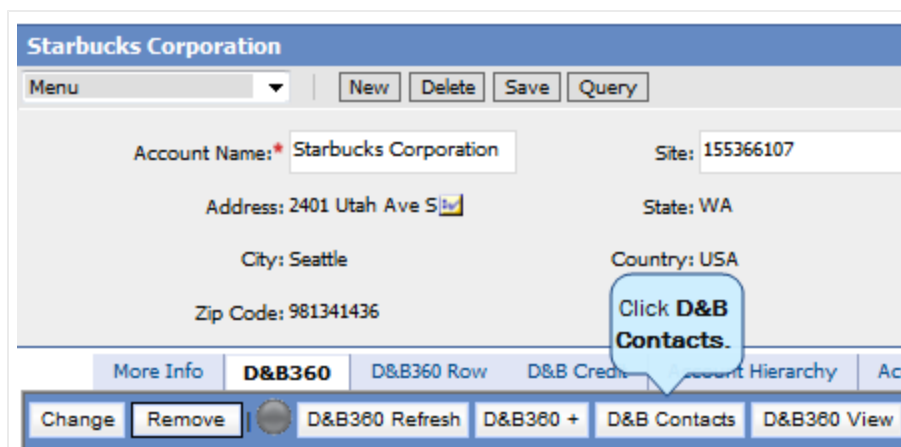
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



2. In the list of accounts that display, select an account that you want to review for adding contacts. You can also click an account in your **Recent Accounts** list.

The details for that account display.

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



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

4. Enter the criteria for your search, then click **Search** to display a list of potential contacts.

The D&B Contact Results window displays a list of contact matching your search criteria.

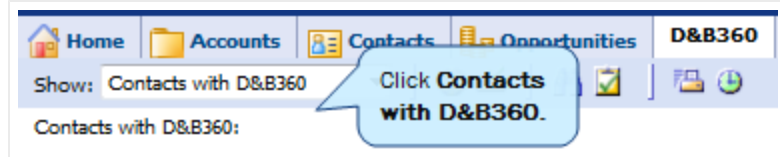
<input type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Opportunity	Full Name ▲	Company Name	Title
<input type="checkbox"/>		<input type="checkbox"/>	Jason Ambrose	Starbucks Corporation	Product Manager
<input type="checkbox"/>		<input type="checkbox"/>	Kristy Bates	Starbucks Corporation	Product Manager - Brand Content & Online
<input type="checkbox"/>		<input type="checkbox"/>	Ben Bauman	Starbucks Corporation	Product Manager
<input type="checkbox"/>		<input type="checkbox"/>	Kendra Carlile	Starbucks Corporation	Product Manager-seattle
<input type="checkbox"/>		<input type="checkbox"/>	Jennifer Gail Connell	Starbucks Corporation	Product Development Manager
<input type="checkbox"/>		<input type="checkbox"/>	Marcio Da Cruz	Starbucks Corporation	Product Development Manager

5. Click to select contacts you want to add, 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.

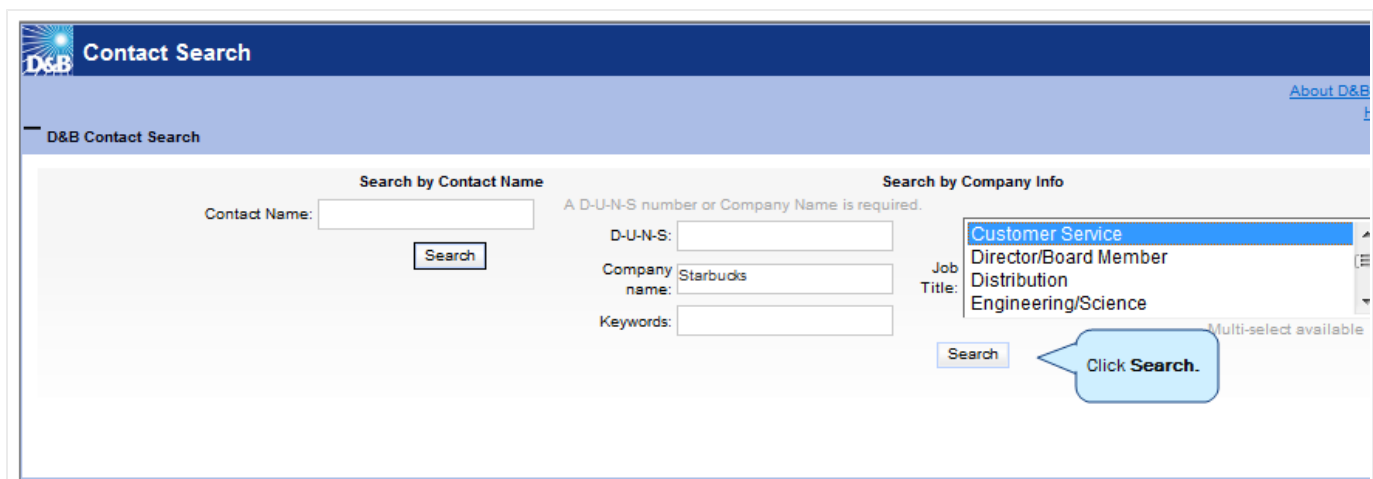
Adding a Contact from D&B360 Directly

- From the **Contacts** menu or from the **D&B360** menu, select **Contacts with D&B360**.



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

- In the **Contact Search** window **Company name** field, type the name of the company as the criteria for search.
- To complete your search, select any **Job Titles** that you want to include.
To select multiple job titles, click one title and use the CTRL key to select others.
- Click **Search**.



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

Note: Searching for a contact by **Contact Name** is a different search from that of searching for contacts by **Company** information. A separate **Search** button is provided.

1. In the **Contact Name** field, type the contact name as criteria for search, and click **Search**.



The D&B Contact Search, D&B360 Contact Results window opens.

Note: To review the meanings for the icons used in this window, [see "Identifying D&B360 Standard Options and Icons" on page 2-5.](#)

2. In the **Full Name** column, find the name of the contact you want to add.
3. In the **Create Contact** column, click to select the check box for that contact.
4. Click **Create**.

Contact Search

D&B Contact Search

D&B360 Contact Results Click **Create**.

Matching Contacts: 1-200 of 778
Current Page: 1

<input type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Opportunity	Full Name	Company Name	Title
<input type="checkbox"/>		<input type="checkbox"/>	Per Michael Hansson	Rosholm Dell Advokatbyrå AB	Board Deputy
<input type="checkbox"/>		<input type="checkbox"/>	Michael Abbott	Dell Inc.	Service Delivery Manager
<input type="checkbox"/>		<input type="checkbox"/>	Mike Adams	Dell Inc.	Se-dell End User Computing Solutions-retail Solutions
<input type="checkbox"/>		<input type="checkbox"/>	MICHELE AIELLO	OASI DELL'AUTO SNC DI AIELLO MICHELE E G	Associate
<input type="checkbox"/>		<input type="checkbox"/>	MICHELE ALESIANI	ALESIANI MICHELE	TOTOLARE
<input type="checkbox"/>		<input type="checkbox"/>	MICHELE ALOISE	ASSOCIAZIONE SCUOLA DELL'INFANZIA S. MAR	Consigliere
<input type="checkbox"/>		<input type="checkbox"/>	Michael Amend	CONFORMITY, INC.	Director Of Enterprise Architecture Dell

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

Adding a Contact Using Build-A-List

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

Home Accounts Contacts Communities **D&B360**

Show: D&B360 Build A List

D&B360 Build A List: Select **D&B360 Build A List**.

The **D&B360 Build A List** window opens.

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

The D&B360 People Results window opens and displays a list of contacts.

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

<input type="checkbox"/> Create Contact	<input type="checkbox"/> Create Opportunity	Full Name ▲	Company Name	Title
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mario Acevedo	Communicard	Development Director - Communicard Company
<input type="checkbox"/>	<input type="checkbox"/>	Carlos Acosta	Alchemy Systems L.P.	Development Manager
<input type="checkbox"/>	<input type="checkbox"/>	Johnny Adamo	Hand Software Corporation	Director, Director Of Business Development
<input type="checkbox"/>	<input type="checkbox"/>	Glenda Adams	Aspyr Media, Inc.	Director Technology and Development Sales Director;

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

Merging Duplicated Contacts

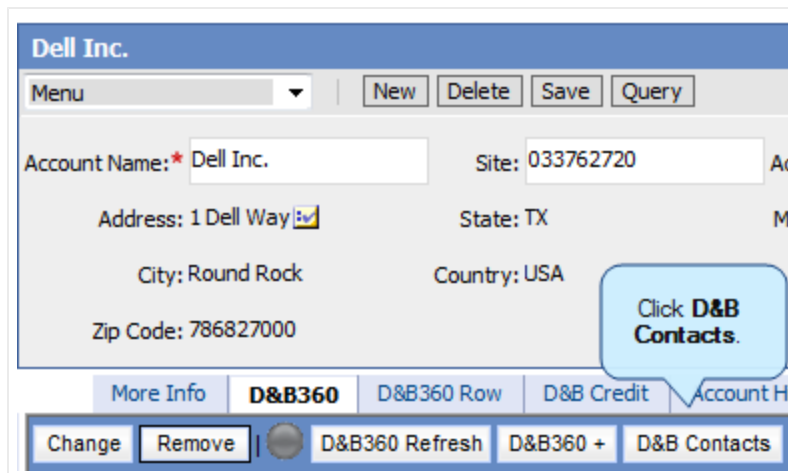
You can use the merge function when you have contact information in your CRM that did not come from D&B. In some cases, you might have more information because of the working relationship you have with this contact. However, in many cases the D&B information might be more current. To review information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

1. From the **Accounts -> D&B360** menu, select **Accounts with D&B360**.




The Account information for the company displays.

2. Click **D&B Contacts**.



3. In the **D&B Contact Search** window, enter your search criteria and click **Search**.

The **D&B360 Contact Results** window displays a list of contacts. A pencil icon in the **Merge** column means that a very similar contact you might want to merge exists.

4. Next to a contact you believe might be duplicated, click the  pencil icon.

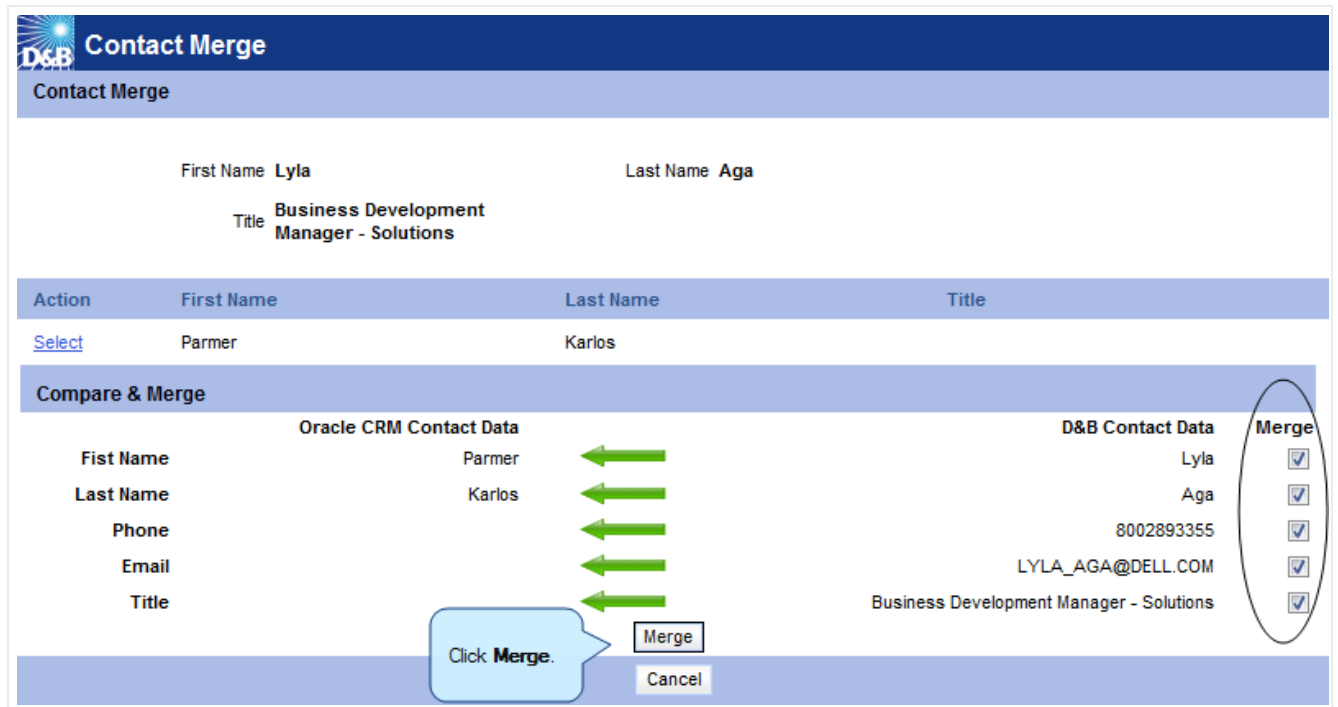


The **Contact Merge** window opens.

5. Select the candidate that you want to merge.

The **Compare and Merge** area displays more details.

6. In the **Merge** column, verify that the check marks display for any information you want to retain after the merge.
7. Click **Merge**.





6 Creating Opportunities with D&B360

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

Leveraging ROW	6-1
Creating a D&B360 Opportunity from a Contact	6-1
Creating an Opportunity from a Contact	6-2
Creating an Opportunity from a Contact using the Opportunities with D&B360 Menu	6-3
Creating an Opportunity from an Existing Account	6-5
Creating a D&B360 Opportunity Manually	6-7
Creating a D&B360 Opportunity Based on a List of Criteria	6-8
Creating a D&B360 Opportunity Based on Attributes of Specific Accounts	6-9
Creating a D&B360 Opportunity from a Competitor	6-11

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

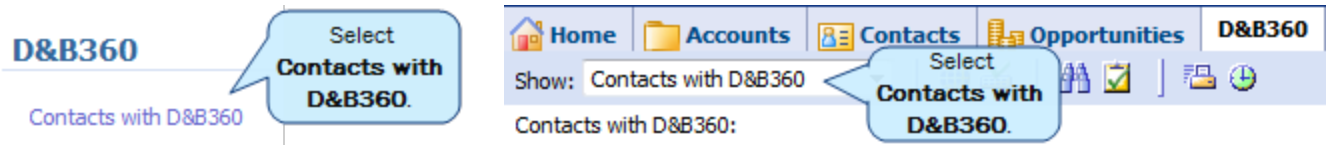
You can use Rest of World (ROW) as an information source for news about a company and link to news stories directly from the windows where you are working. For more information, [see "Leveraging ROW" on page 6-1.](#)

Creating a D&B360 Opportunity from a Contact

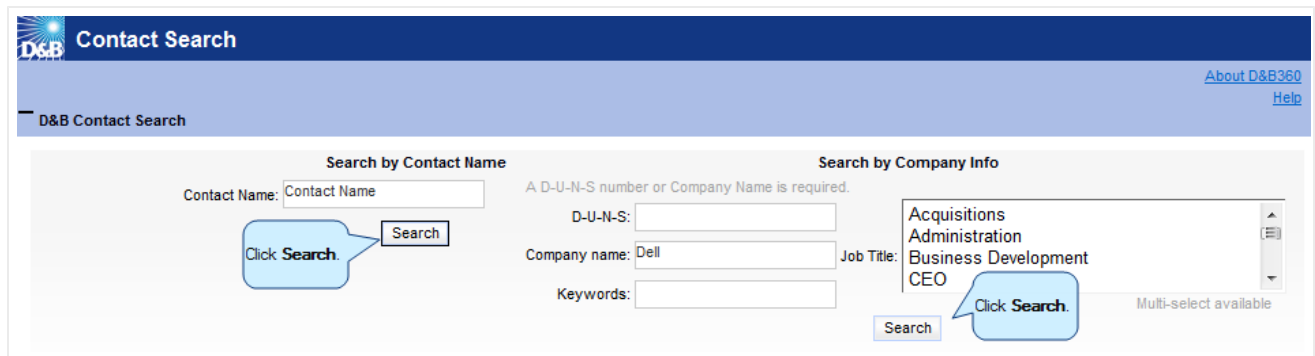
If you've already established rapport with a contact, he or she would make a good opportunity for you. Or, a contact at a specific company might be a good opportunity for you.

Creating an Opportunity from a Contact

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



2. In the **D&B Contact Search** window, enter your search criteria, either **Search by Contact Name** or **Search by Company Name**.
3. In the appropriate area, either **Search by Contact Name** or **Search by Company Info**, click **Search**.



4. In the **D&B360 Contract Results** window, click the check box next to the contact you want to choose for a new opportunity.
5. Click **Create**.

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

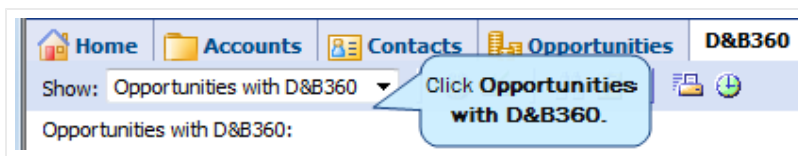
D&B360 Contact Results					
<input type="button" value="Create"/> 1 Records Selected					
Matching Contacts: 1-200 of 24197					
Current Page: 1					
<input type="checkbox"/> Create Contact	Merge	<input type="checkbox"/> Create Opportunity	Full Name ▲	Company Name	Title
<input type="checkbox"/>		<input type="checkbox"/>	STEPHEN JOSEPH FELICE	Dell (China) Company Limited	
<input type="checkbox"/>		<input type="checkbox"/>	PHILLIP E.KELLY	Dell (China) Company Limited	
<input type="checkbox"/>		<input checked="" type="checkbox"/>	Janet Bawcom Wright	Dell AB	Board Member

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

Creating an Opportunity from a Contact using the Opportunities with D&B360 Menu

Alternatively, you can create a new opportunity from a contact by using the **Opportunities with D&B360** menu.

1. From the Siebel **Opportunities** menu or from the **D&B360** menu, select **Opportunities with D&B360**.



2. In the **D&B Create Opportunity, D&B Opportunity Search** window, **Search by Company Info** area, type the **Company Name**, and use the drop-down menus to select **Country**, and **State/Province** (all required) and any other optional search criteria.
3. Click **Search**.

Create Opportunity

D&B Opportunity Search

Search by Contact Name

Contact Name:

Search by Company Info

Company Name*: Country*:

City: State/Province**:










Address: Postal Code:

Phone:

Click Search.

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

The **D&B Opportunity Search, D&B360 Account Results** window opens and displays a list of Matching Companies based on your search.

D&B Opportunity Search					
D&B360 Account Results					
Matching Companies: 22					
Actions	Match Info	Company Name	Address	City	State/Province
select 	*****5195	 DELL INC.	1 DELL WAY	ROUND ROCK	TX
select 	*****5955	DELL INC.	1 DELL WAY	ROUND ROCK	TX
select 	*****1781	DELL INC.	1 DELL WAY	ROUND ROCK	TX
select 	*****7503	DELL INC.	1 DELL WAY	ROUND ROCK	TX
select 	*****9549	DELL INC.	501 DELL CENTER BLVD BLDG 2	ROUND ROCK	TX
select	*****4215	DELL INC.	8200 N ALLEN RD	ROUND ROCK	TX
select	*****0543	DELL INC	2300 GREENLAWN BLVD	ROUND ROCK	TX
select 	*****6210	DELL U S A CORPORATION	1 DELL WAY	ROUND ROCK	TX
select 	*****8834	DELL GEN. P. CORP.	1 DELL WAY	ROUND ROCK	TX
select 	*****9994	DELL INTERNATIONAL INCORPORATED	1 DELL WAY	ROUND ROCK	TX
select	*****4913	DELL MARKETING CORPORATION	1 DELL WAY	ROUND ROCK	TX

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

- In the **Actions** column, click **select** next to the **Company Name** you want to associate with the company account.

Search Criteria		
D&B360 Contact Results		
If contact not found, Create Opportunity Manually		
Matching Opportunities: 1-1 of 1 Current Page: 1		
Create Opportunity	Full Name ▲	Company Name
Select	Michael S Dell	Dell Marketing Corporation
Matching Opportunities: 1-1 of 1 Current Page: 1		

- In the **D&B360 Contact Results** window, click **Select**.

The details for this Opportunity display.

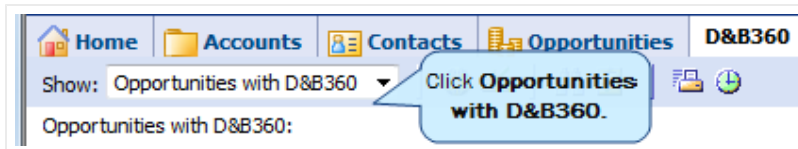
- Click **Save** to save this opportunity.

To create an opportunity manually, [see "Creating a D&B360 Opportunity Manually" on page 6-7.](#)

Creating an Opportunity from an Existing Account

You can create a new opportunity from an existing contact by using the **Opportunities with D&B360** menu.











1. From the Siebel **Opportunities** menu or from the **D&B360** menu, select **Opportunities with D&B360**.



2. In the **D&B Create Opportunity, D&B Opportunity Search** window, **Search by Company Info** area, type the **Company Name**, and use the menus to select **Country**, and **State/Province** (all required) and any other optional search criteria.
3. Click **Search**.


The **D&B Opportunity Search, D&B360 Account Results** window opens and displays a list of Matching Companies based on your search.

4. In the **Actions** column, click **select** next to the **Company Name** you want to associate with the company account.

D&B Opportunity Search						
D&B360 Account Results						
Matching Companies: 22						
Actions	Match Info	Company Name	Address	City	State/Province	
select 	*****5195	 DELL INC.	1 DELL WAY	ROUND ROCK	TX	
select 	*****5955	DELL INC.	1 DELL WAY	ROUND ROCK	TX	
select 	*****1781	DELL INC.	1 DELL WAY	ROUND ROCK	TX	
select 	*****7503	DELL INC.	1 DELL WAY	ROUND ROCK	TX	
select 	*****9549	DELL INC.	501 DELL CENTER BLVD BLDG 2	ROUND ROCK	TX	
select	*****4215	DELL INC.	8200 N ALLEN RD	ROUND ROCK	TX	
select	*****0543	DELL INC	2300 GREENLAWN BLVD	ROUND ROCK	TX	
select 	*****6210	DELL U S A CORPORATION	1 DELL WAY	ROUND ROCK	TX	
select 	*****8834	DELL GEN. P. CORP.	1 DELL WAY	ROUND ROCK	TX	
select 	*****9994	DELL INTERNATIONAL INCORPORATED	1 DELL WAY	ROUND ROCK	TX	
select 	*****4913	DELL MARKETING CORPORATION	1 DELL WAY	ROUND ROCK	TX	

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

- In the **D&B360 Contact Results** window, click **Select**.

Search Criteria		
D&B360 Contact Results		
If contact not found, Create Opportunity Manually		
Matching Opportunities: 1-1 of 1		
Current Page: 1		
Create Opportunity	Full Name 	Company Name
Select	Michael S Dell	Dell Marketing Corporation
Matching Opportunities: 1-1 of 1		
Current Page: 1		

The details for this Opportunity display.

- Click **Save** to save this opportunity.

To create an opportunity manually, [see "Creating a D&B360 Opportunity Manually" on page 6-7.](#)

Creating a D&B360 Opportunity Manually

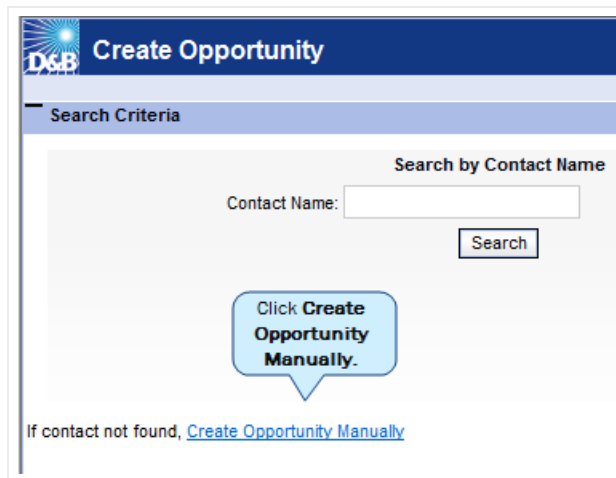
When you run a D&B People search to create an opportunity and the contact is not found, you can manually complete the process of establishing a opportunity.

1. In the **D&B360 Contacts** window, type a contact name and click **Search**.

— or —

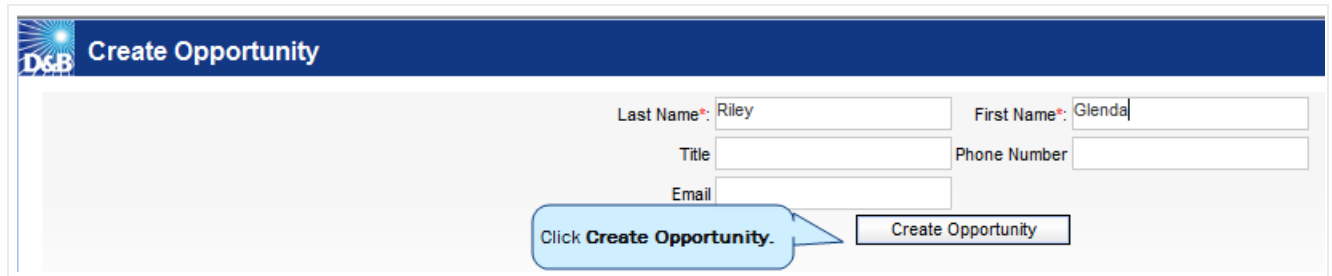
In the **D&B Create Opportunity** window, **Search by Contact Name** area, type the **Contact Name**, and click **Search**.

If the contact is not found, in the **Create Opportunity** results window, click **Create Opportunity Manually**.



The screenshot shows the 'D&B Create Opportunity' window. Under the 'Search Criteria' tab, there is a section titled 'Search by Contact Name'. It contains a text input field labeled 'Contact Name:' and a 'Search' button. A blue callout bubble with a white border points to the 'Search' button and contains the text 'Click Create Opportunity Manually.' Below the input field, there is a blue link that reads 'If contact not found, [Create Opportunity Manually](#)'.

2. In the **D&B Create Opportunity** window, type the **Last Name**, **First Name** (both required), and any other contact information you have for this contact.
3. Click **Create Opportunity**.

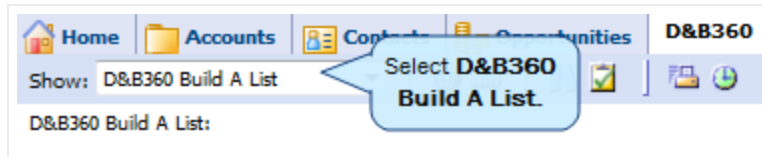


The screenshot shows the 'D&B Create Opportunity' window with a form for entering contact information. The 'Last Name' field contains 'Riley' and the 'First Name' field contains 'Glenda'. There are also empty fields for 'Title', 'Phone Number', and 'Email'. A 'Create Opportunity' button is located at the bottom right. A blue callout bubble with a white border points to the 'Create Opportunity' button and contains the text 'Click Create Opportunity.'

Note: You can also create an opportunity manually by running a people search. Review the results in the **People Results** window and follow the previous steps to create the opportunity manually.

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

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



The **D&B360 Build A List** window opens, which includes several categories of information, each of which provides specific criteria you can select for your search.

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

Build a List

Search | People Results | Company Results

People Search | Click **People Search**.

Saved Search -- none -- | Save Current Search | Clear Criteria

People (Bio and Title Keyword, Job Title)

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

Job Title: Acquisitions, Administration, **Business Development**, CEO

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

Country: United States, Albania, Algeria, American Samoa

Global State/Province:
e.g. Queensland or NY. Multi-select values must be comma separated with no spaces

US State/CAN Province: -----US State-----, Alabama, Alaska, Arizona

City:
e.g. Madrid or New York. Multi-select values must be comma separated with no spaces

US Metropolitan Area: 12220 - Auburn-Opelika,AL, 12260 - Augusta-Richmond Co, **12420 - Austin-Round Rock, TX**, 12540 - Bakersfield,CA

ZIP/Postal Code:
e.g. 78701 or SW1P 1JA or SW1. Multi-select values must be comma se

US/CAN Area Code:
e.g. 512. Multi-select values must be comma separated with no spaces

Area Around US ZIP Code: Find results within of ZIP Code
e.g. Find results within a 50 mile radius of a Postal Code (up to a maximum radius of 100 miles or 100 km). Use on

Company size (Annual Sales, Total employees, Market Cap and more)

Industry (SIC codes and NAICS codes)

Company type (Public/Private, Location Type, Subsidiary Status and Marketing pre-screen)

Financial data (Key numbers)

The **D&B360 People Results** window opens and displays a list of contacts.

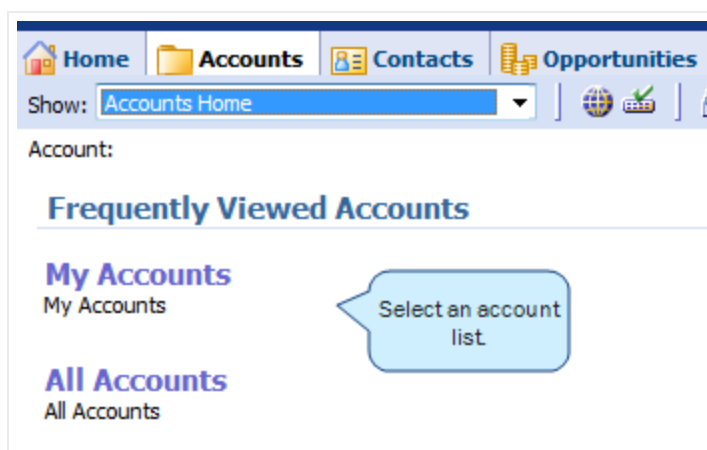


1. In the **Create Opportunity** column, select the checkbox next to the candidate you have selected.
2. Click **Create**.

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 Opportunity Based on Attributes of Specific Accounts

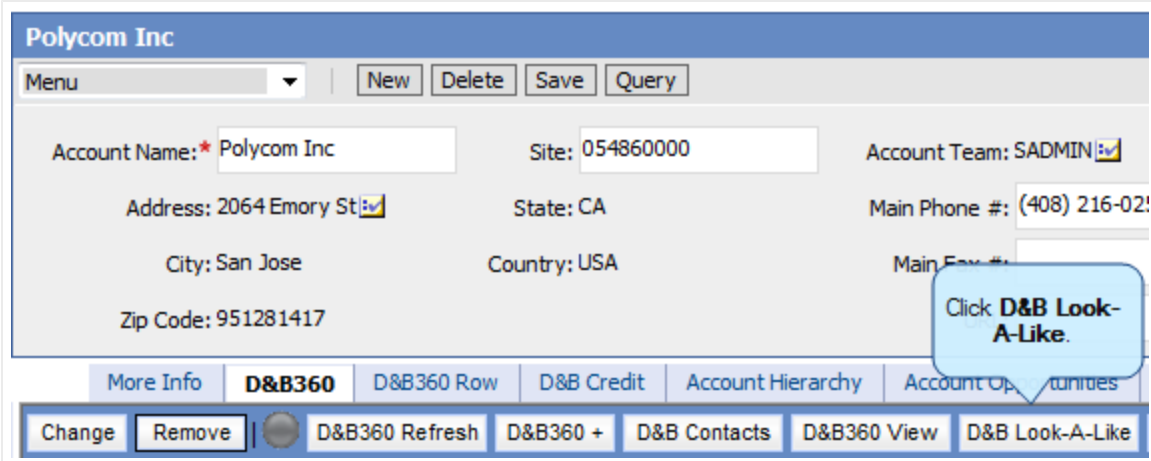
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



2. From the list of accounts that display, select an account that you want to review for adding contacts. You can also click an account in your **Recent Accounts** list.

The details for that account display.

3. From the **D&B360** menu, click **D&B Look-A-Like**.



Polycom Inc

Menu [New] [Delete] [Save] [Query]

Account Name: * Polycom Inc Site: 054860000 Account Team: SADMIN

Address: 2064 Emory St State: CA Main Phone #: (408) 216-021

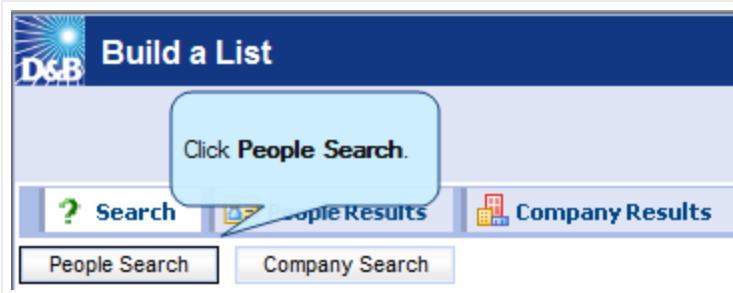
City: San Jose Country: USA Main Fax #:

Zip Code: 951281417

More Info **D&B360** D&B360 Row D&B Credit Account Hierarchy Account Opportunities

Change Remove D&B360 Refresh D&B360 + D&B Contacts D&B360 View **D&B Look-A-Like**

4. In the **D&B Build a List** window, click **People Search**.



D&B Build a List

Click **People Search**.

Search People Results Company Results

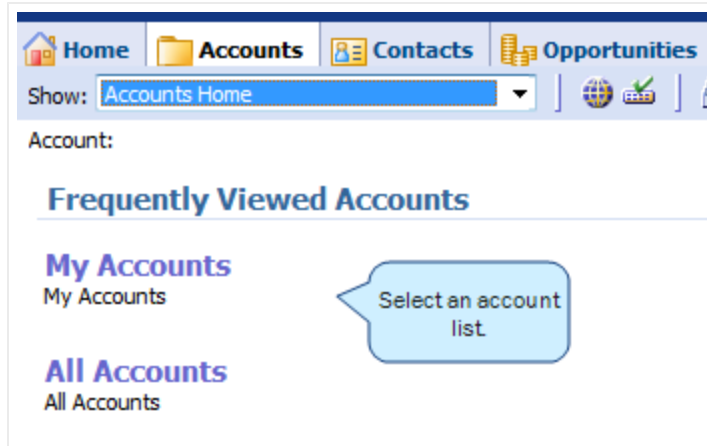
People Search Company Search

5. Review the People Results (not shown) and next to the candidate, select **Create Opportunity**.
6. Click **Create**.

Before you run the search, you might want to alter or add information.

Creating a D&B360 Opportunity from a Competitor

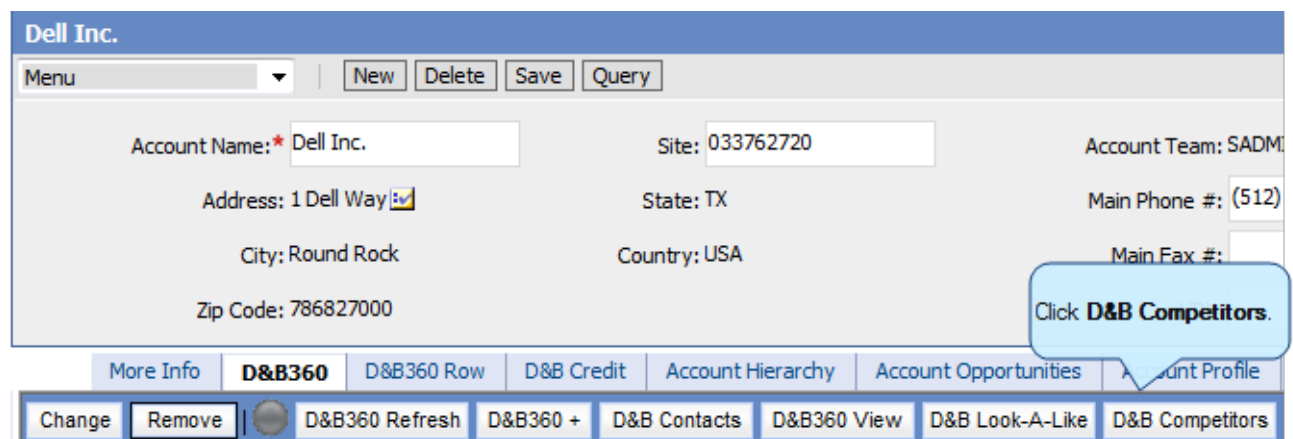
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.




2. From the list of accounts that display, select an account that you want to review for adding opportunities. You can also click an account in your **Recent Accounts** list.

The details for that account display.

3. In the **D&B360** menu, click **D&B Competitors**.



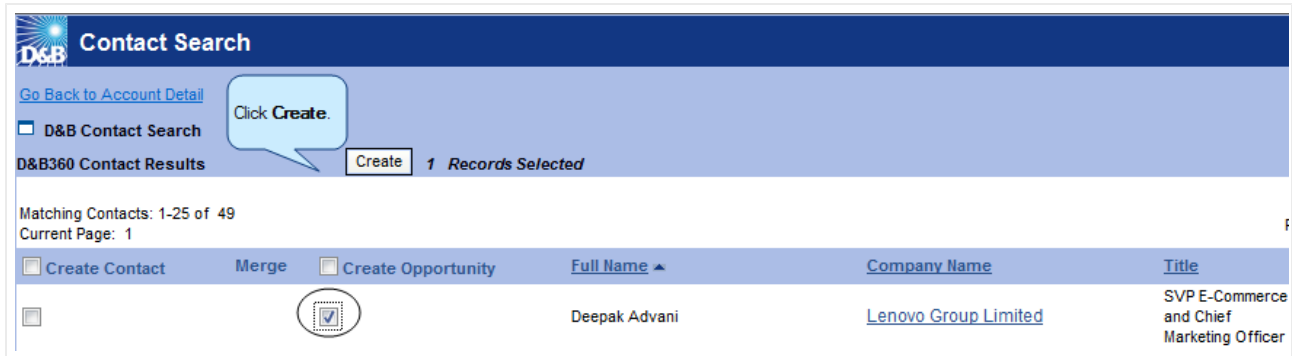
The **D&B Competitors** window displays the matching companies.

- Next to the company you want to use to search for opportunities, click the  people icon and then click **Create**.



The D&B360 Contact Results window opens and displays the matching contacts.

- In the **Create Opportunity** column, next to the name of the opportunity you want to add, click the check box to select it, then click **Create**.







The D&B360 Results window displays a green checkmark next to the opportunity you have created.

7 Using Build a List

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

General Search Process	7-1
Specific Criteria Collected	7-2
Saving Searches	7-3
Using a Saved Search	7-4

Note the following:

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

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

General Search Process

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

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

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

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

Specific Criteria Collected

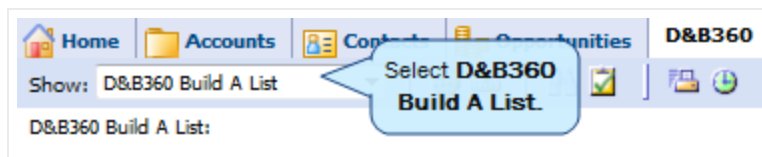
Criteria Categories	Specified Information	
PEOPLE SEARCHES		
People	Bio and Title Keyword	Job Title
COMPANY SEARCHES		
Company location	Country (select from list)	US State or CAN Province (select from list)
	US Metropolitan Area	Global State or Province
	City	Zip or Postal Code
	US or CAN Area Code	Area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

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

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

Saving Searches

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



The **D&B360 Build A List** window opens, which includes several categories of information, each of which provides specific criteria you can select for your search.

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

The screenshot shows the 'Build a List' interface with the following elements:

- Navigation:** Search, People Results, Company Results tabs. Below are 'People Search' and 'Company Search' buttons.
- Buttons:** 'Save Current Search' and 'Clear Criteria' buttons.
- Search Criteria:**
 - Keyword(s) in:** A text input field with radio buttons for 'Title' (selected) and 'Bio'. Example text: 'e.g. marketing or Harvard or ad sales.'
 - Job Title:** A list box containing 'Acquisitions', 'Administration', 'Business Development' (highlighted), and 'CEO'.
 - Company location (Country, US State/CAN Province, City and more):**
 - Country:** A list box with 'United States' selected. Other options include Albania, Algeria, and American Samoa.
 - US State/CAN Province:** A list box with '----US State----' selected. Other options include Alabama, Alaska, and Arizona.
 - Global State/Province:** A text input field.
 - City:** A text input field.

Callouts point to 'Click People Search.', 'Click Company Search.', and 'Click Save Current Search.'

5. In the **Saved Search** field, type a name for the search that identifies the search objective.
6. Click **Save Search**.

This screenshot shows the 'Save Search' step of the process. The 'Saved Search' field is highlighted with a callout: 'Type name for saved search.' The 'Save Search' button is also highlighted with a callout: 'Click Save Search.'

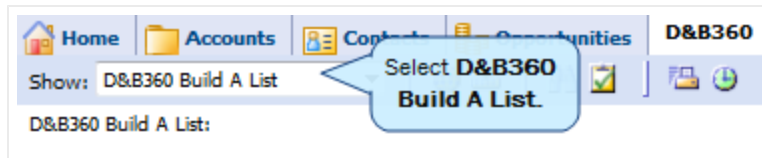
Your search is now saved, and you can use it again at a later time.

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

Using a Saved Search

The **D&B360 Build A List** window opens, which includes several categories of information, each of which provides specific criteria you can select for your search.

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



2. In the **D&B360 Build a List** window, use the menu to display your saved searches.
3. Click to select saved search. The search criteria changes.
4. Click the appropriate search button.



Index

A

accounts

company overview window 3-1

icons used in windows 3-1

merging 5-9

accounts, creating

based on account attributes 3-6

based on competitors 3-12

based on list of criteria 3-4

from existing account records 3-9

from family tree accounts 3-9

using name and address 3-2

accounts, enriching

adding D&B data 4-2

adding financial information 4-10

adding industry information 4-6

identifying related accounts 4-5

adding industry information 4-8

B

biographies of contacts 5-2

build-a-list

using when saving searches 7-3

C

company results, exporting to a spreadsheet program 3-1

contacts

icons used in windows 5-1

number of records message 5-1

person biographies 5-2

contacts, adding

directly from D&B360 5-5

from account records 5-3, 6-9

using build-a-list 5-7

credit consumption rules 1-4

criteria categories 7-2

D

D&B360

introduction 1-1

packages 1-2

product benefits 1-1

D&B360 window 2-1

E

Excel spreadsheet, exporting results to 3-1

I

icons 2-5

L

log in 2-2

O

opportunities, creating

- based on list of criteria 6-8

- from competitors 6-11

- from contacts 6-1

- from existing account attributes 6-5

- manually 6-7

P

password 2-2

premium people, definition 1-3

R

rest of world 2-2

rules for credit consumption 1-4

S

searches

- process 7-1

- saving 7-3

- using 7-5

setting alerts 2-2

spreadsheets, exporting results to 3-1

T

tiers, D&B360 features 1-2

trial customers, rules for credit consumption 1-4

U

user name 2-2

W

windows

- D&B360 2-1



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

www.dnb.com