D&B360

User Guide

for Siebel CRM

Version 2.2

Contents

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

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	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 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	• 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.

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.

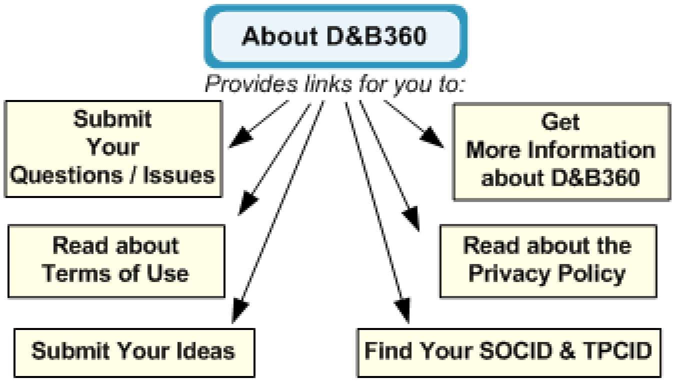
Type of Tracking	Description
Person Credit	• Imports of premium people are limited and charged against your contact credits. That is, D&B only charges you the first time you import a specific premium person. D&B does not charge any subsequent imports of that person. • For each premium import, one credit 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.

2 Getting Started with D&B360

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

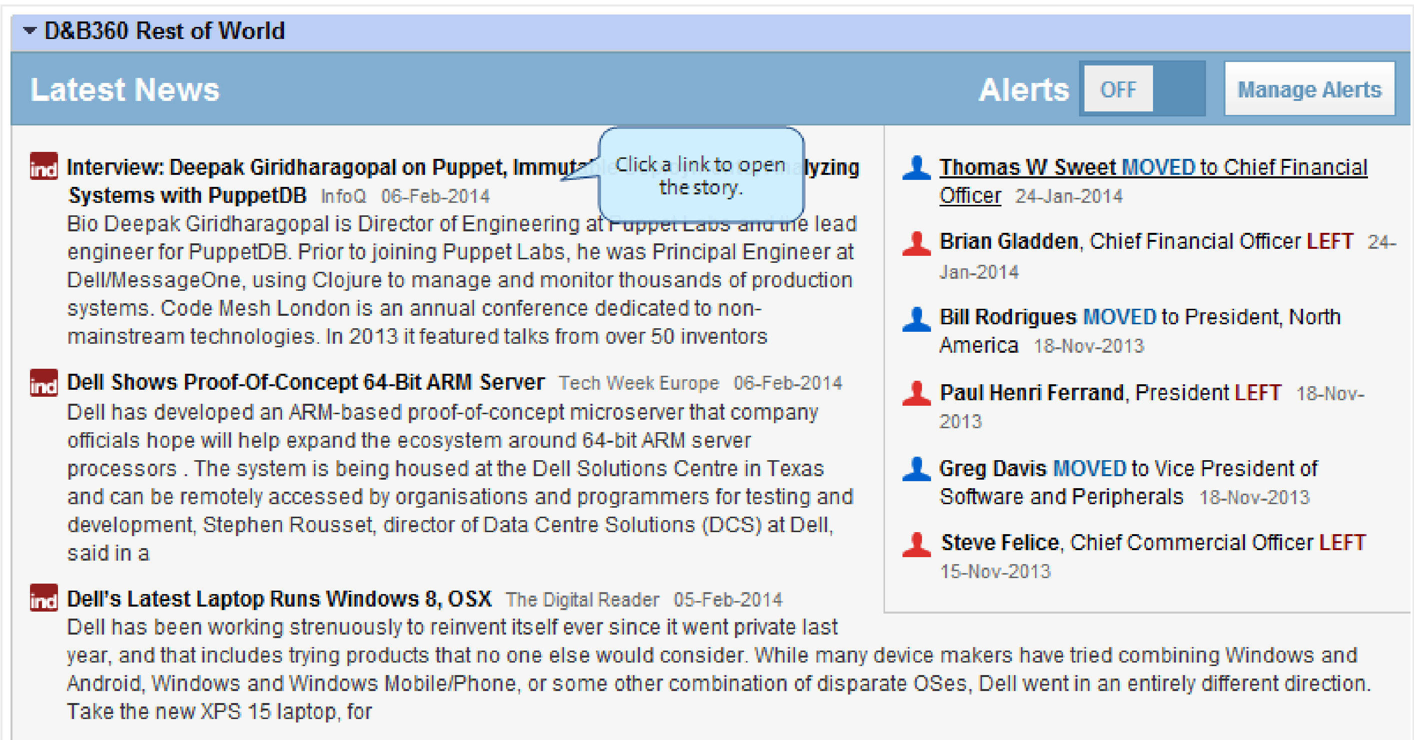
After your administrator has added D&B360 to your CRM, you are ready to go.

- 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

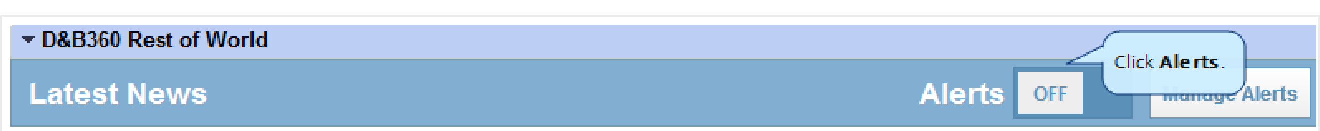
On the **D&B360 Rest of World** area for an account, the Latest News about a company and its management displays. You can also set alerts to receive email notifications about news and management changes for a specific company. Click a news heading link to open that story in a new window.



Setting Alerts

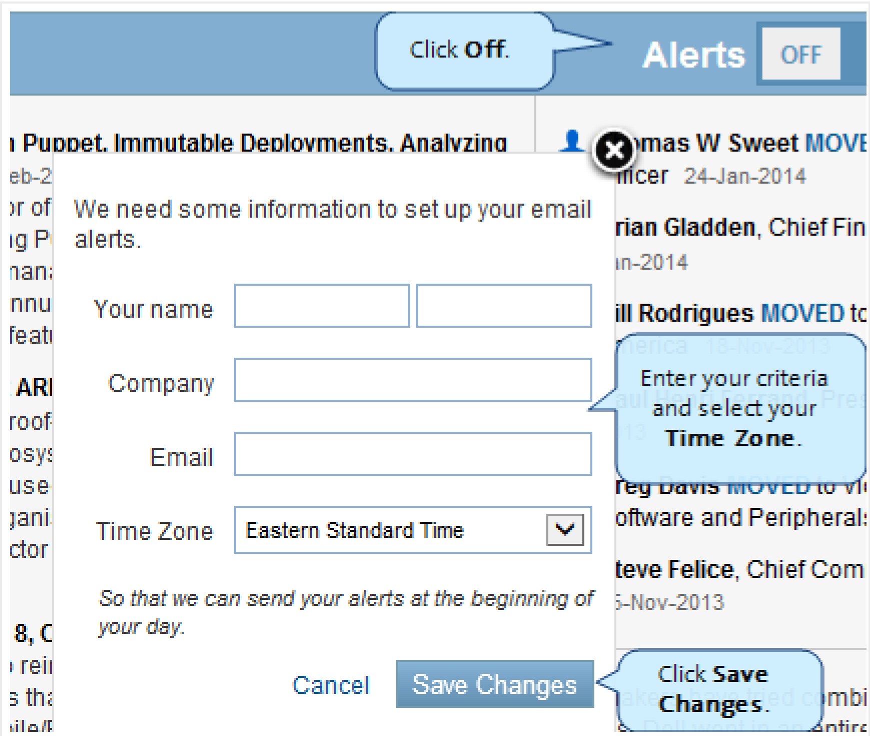
If you have already set alerts, the **On** button displays next to **Alerts**. If you haven't set alerts, the **Off** button displays next to **Alerts**. To set alerts:

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.

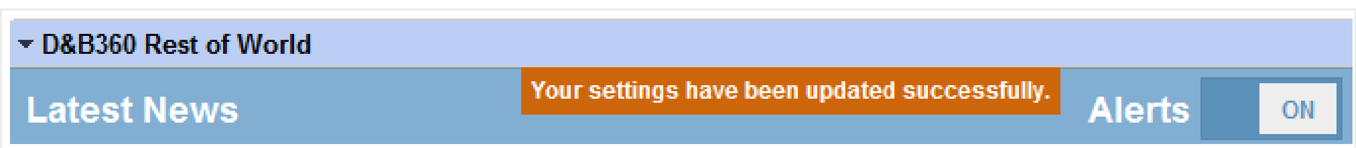


3. In the window that opens, type or enter your information in the fields that display and select your **Time Zone**.

4. Click **Save Changes**.

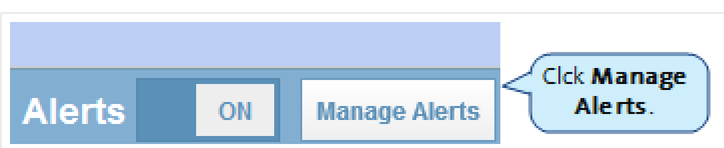


A message displays that your settings were updated, and the **Alerts** button changes to **ON**.



Managing Alerts and Triggers

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

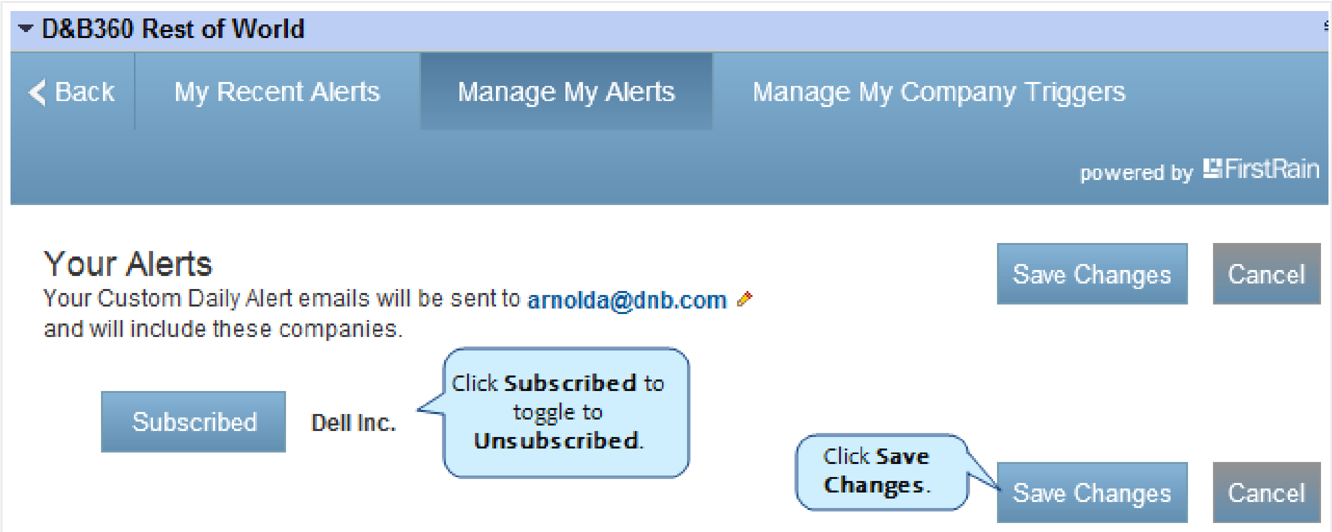


2. Click the **Manage My Alerts** tab to display **Your Alerts**.

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

– or –

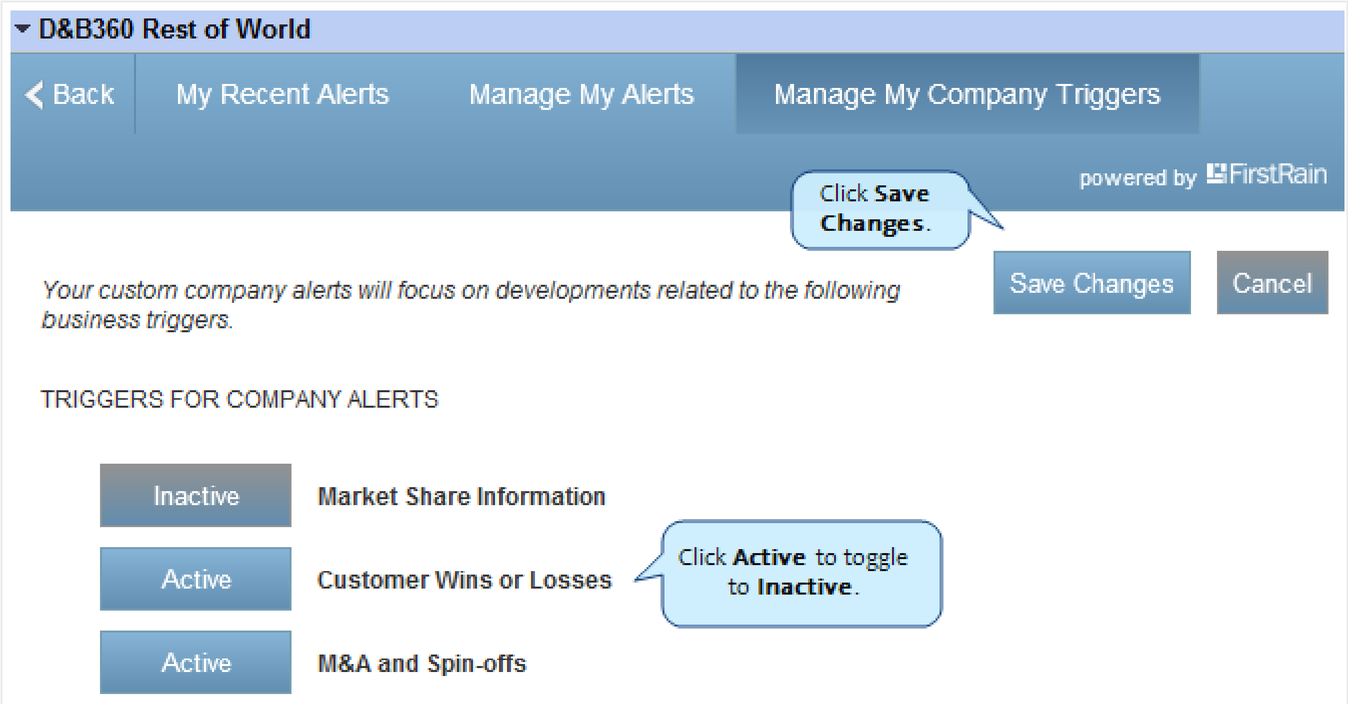
Click **Unsubscribed** to toggle to **Subscribed**



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

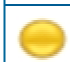
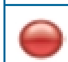
D&B360 provides standard icons and link options that make it easy for you to access and understand the information you need.

D&B Standard Options

D&B360 Options	Description
Change/Remove	Allows you to change or remove D&B data (including company, 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.

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.

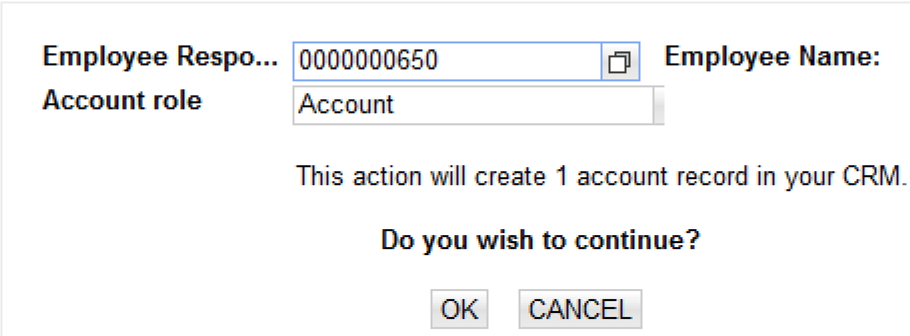
A yellow triangle with the letter *C* indicates an existing contact.

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.



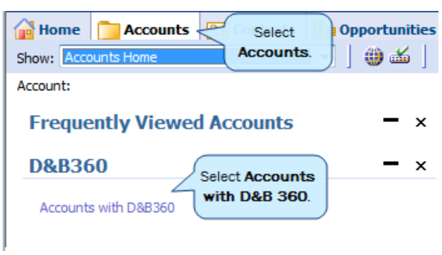
Creating a New Account Using Name and Address

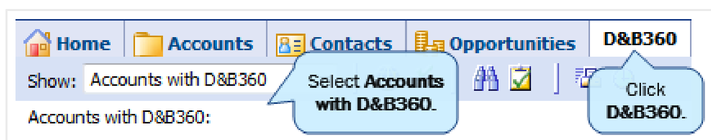
You can run a search using a name and address, then create an account based on the search results.

1. From the 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.**





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

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

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.**

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

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

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.

 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:

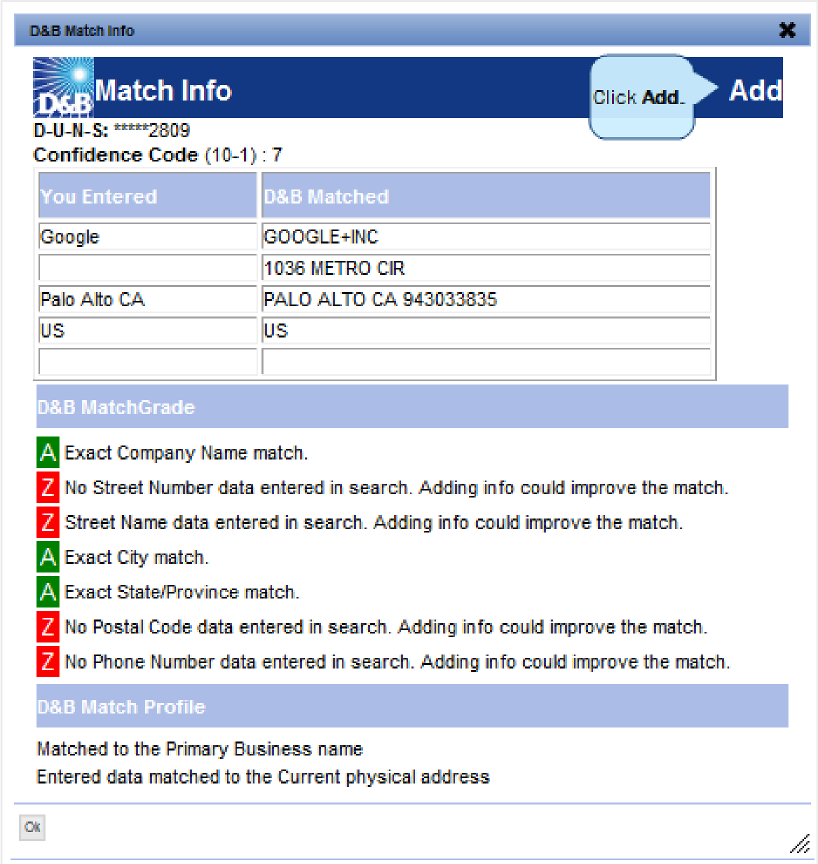
1. In the Match Info column, next to the match candidate that you selected, click the **D-U-N-S Number**.

   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.

2. Review the match information.
3. 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**.

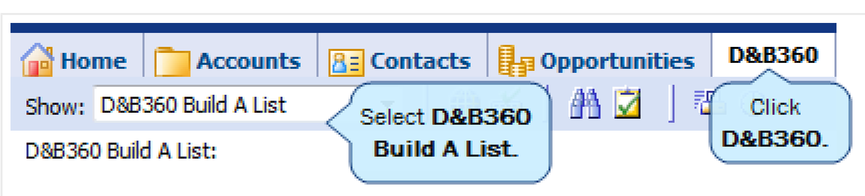


Creating a D&B360 Account Based on a List of Criteria

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

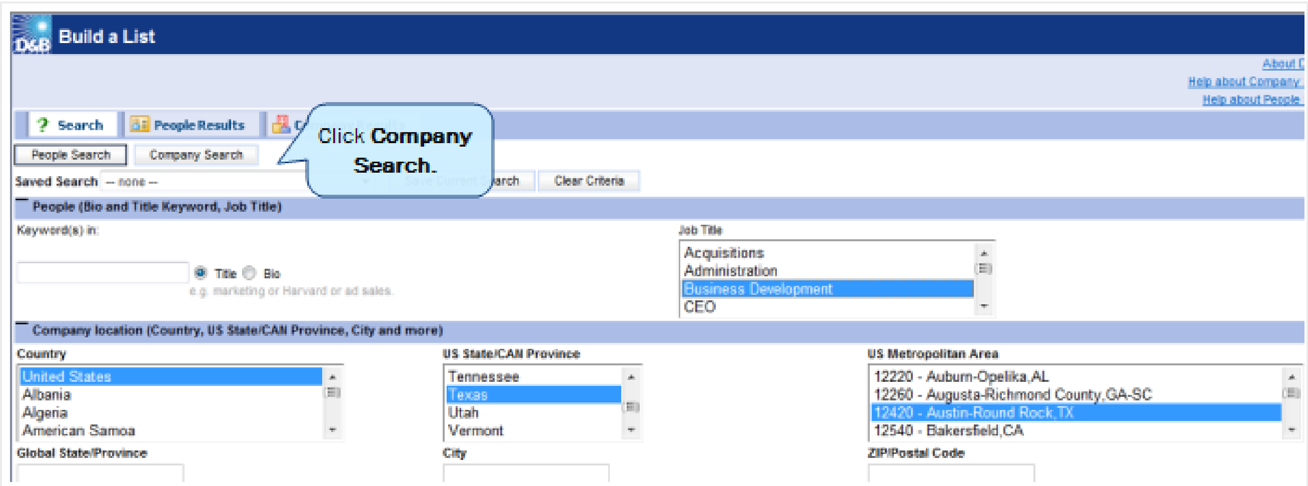
To complete the following steps, you must select an account that has D&B data. For more information about adding D&B data to an account that is already in your CRM, see "Enriching Accounts with D&B360" on page 4-1.

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:

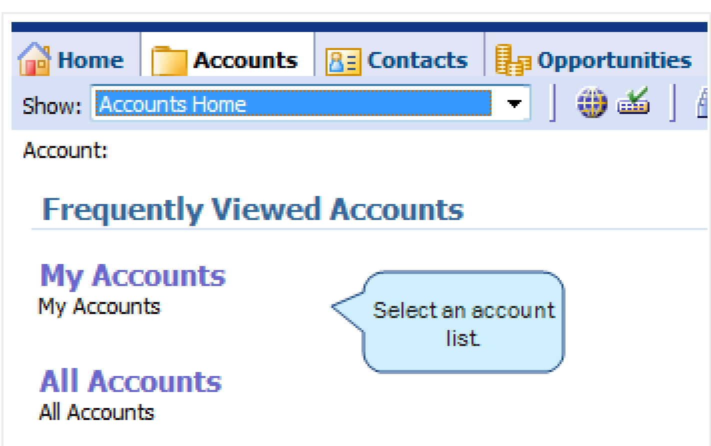
- Company location
- Company size (and more size criteria)
- Industry
- Company type
- Financial data
- Key numbers
- US IPO data
- Special criteria

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.

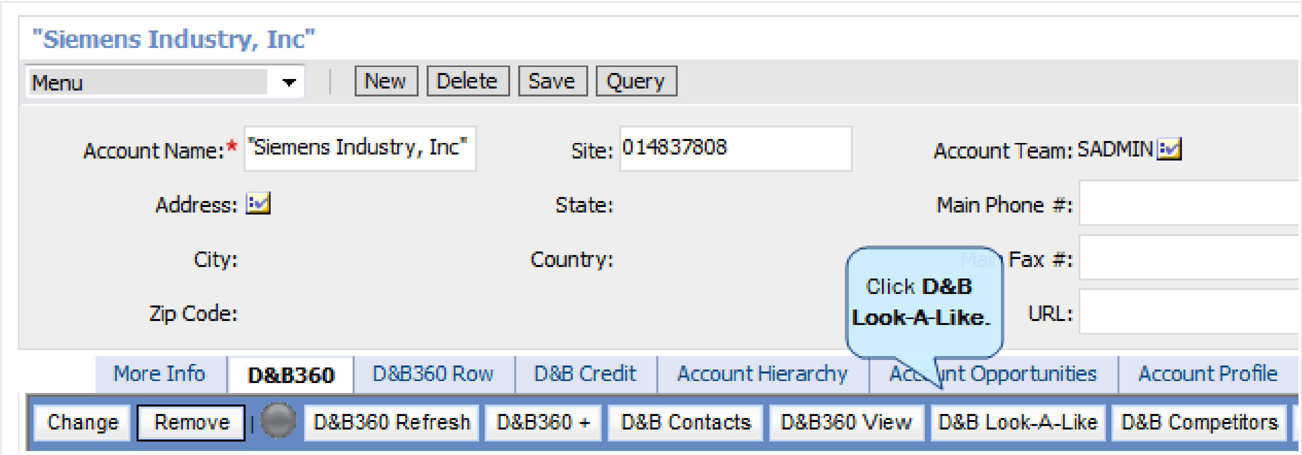
1. From the **Accounts** menu, select **All Accounts** or **My Accounts.**



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.

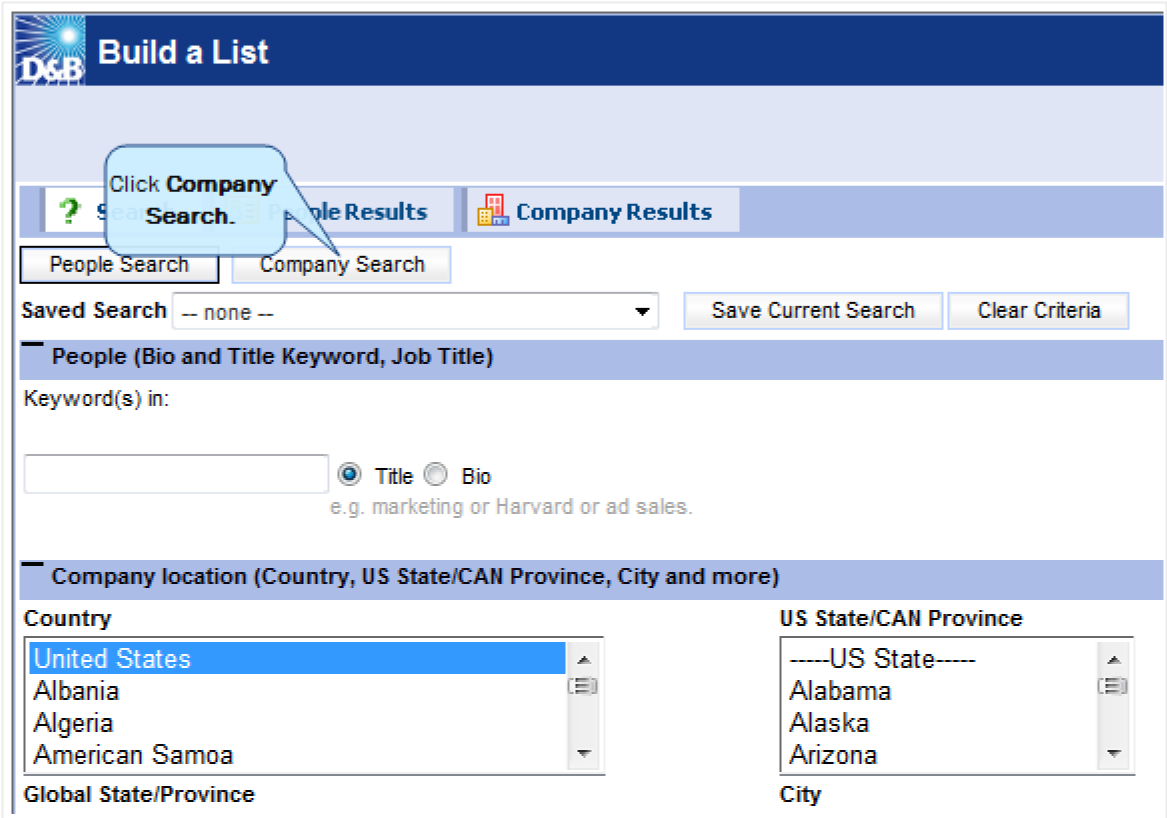
   The details for that account display.

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



   The **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**.

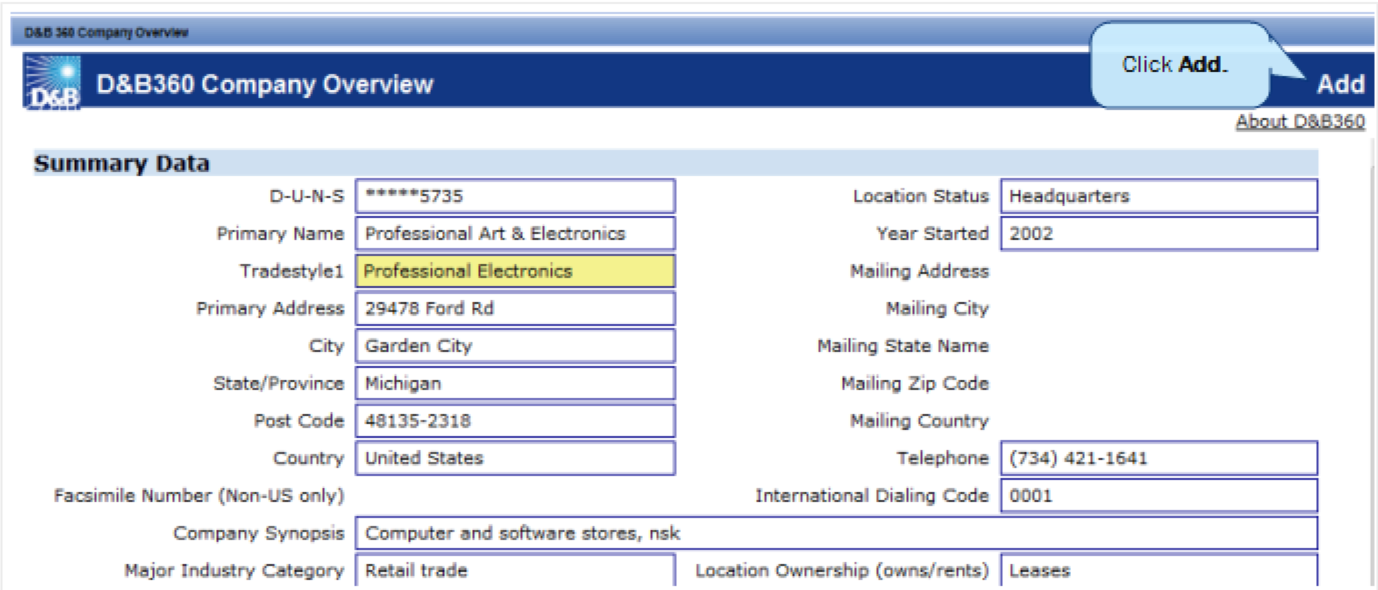


The **D&B360 Company Results** window displays a list of companies that match your search criteria.

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.

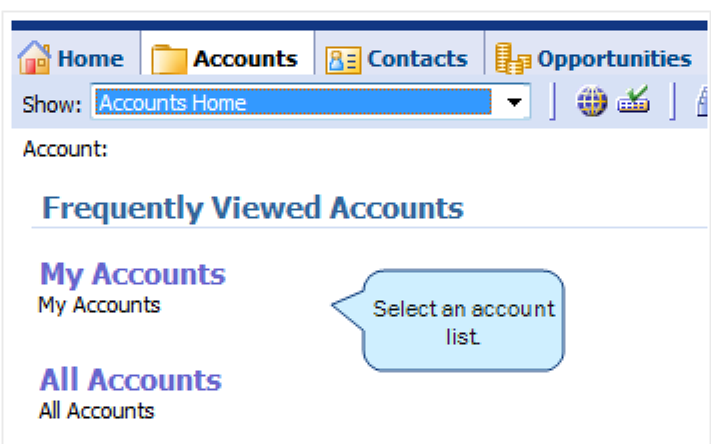


Creating a D&B360 Account from Records Related to Existing Accounts

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.

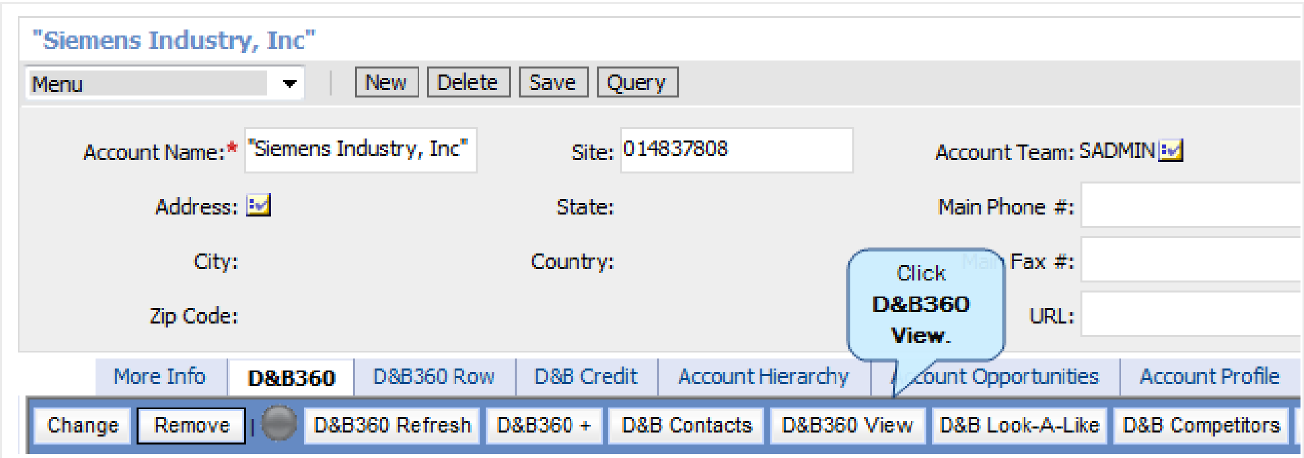
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



2. 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.

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



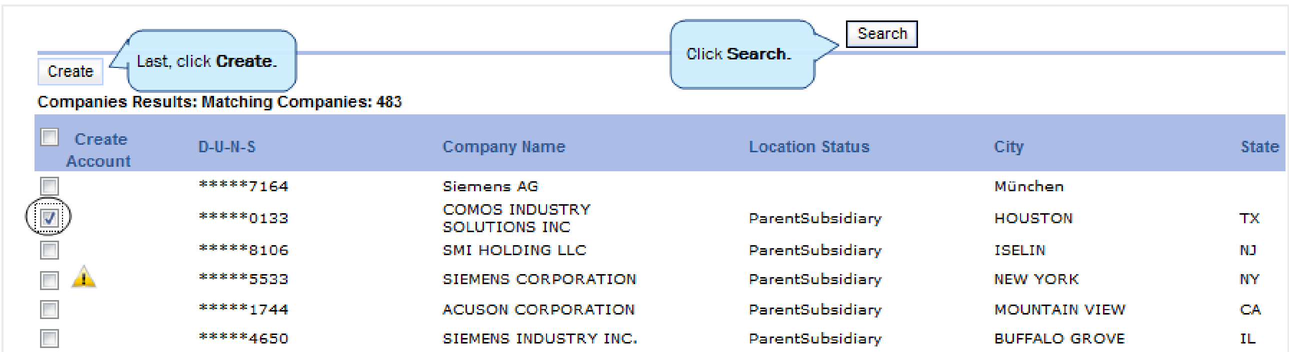
4. In the **D&B360 View** window, click **Family Tree Query.**
5. After the family tree information displays, click **Search**.

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

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 yellow triangle — will display next to that account.



Companies Results: Matching Companies: 483

Create Account	D-U-N-S	Company Name	Location Status	City	State
	*****7164	Siemens AG		München	
	*****0133	COMOS INDUSTRY SOLUTIONS INC	ParentSubsidiary	HOUSTON	TX
	*****8106	SMI HOLDING LLC	ParentSubsidiary	ISELIN	NJ
	*****5533	SIEMENS CORPORATION	ParentSubsidiary	NEW YORK	NY
	*****1744	ACUSON CORPORATION	ParentSubsidiary	MOUNTAIN VIEW	CA
	*****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.

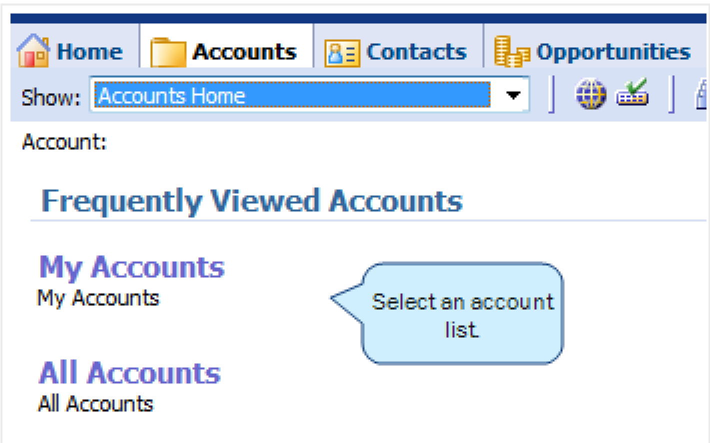
   If a search result record is already in your database as an account, the duplicate account icon — a yellow triangle — will display next to that account.

Creating a D&B360 Account from Competitors

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

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.

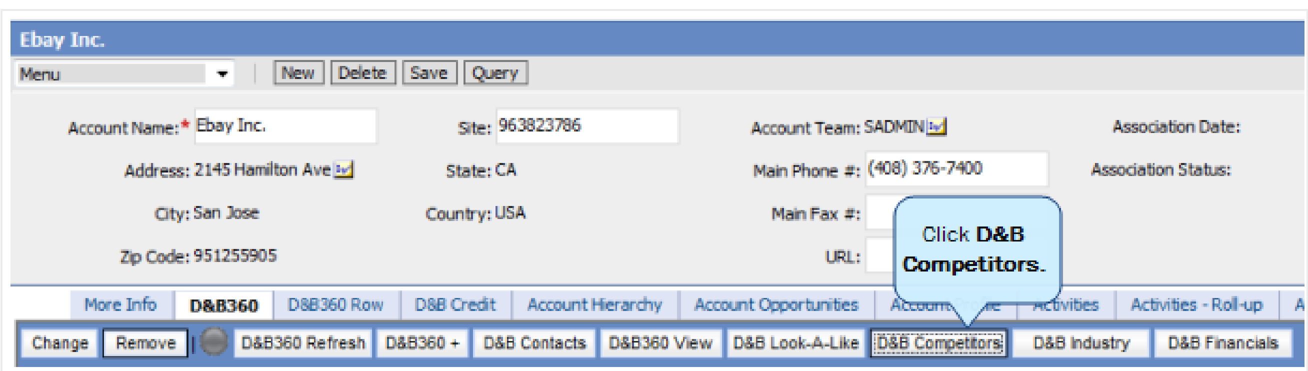
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



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.

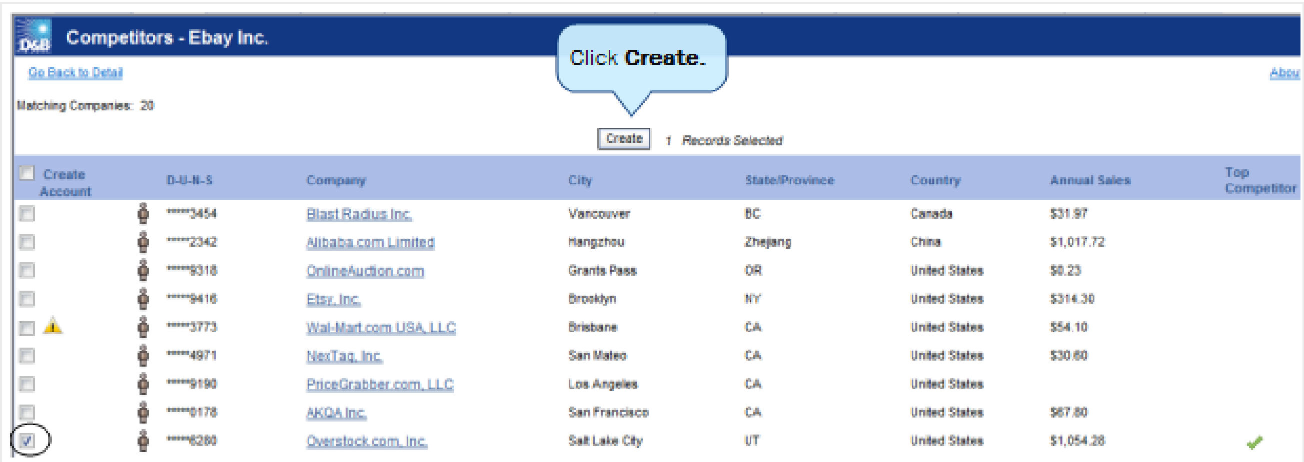
3. From the **D&B360** menu, click **D&B Competitors**.



> **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**.



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

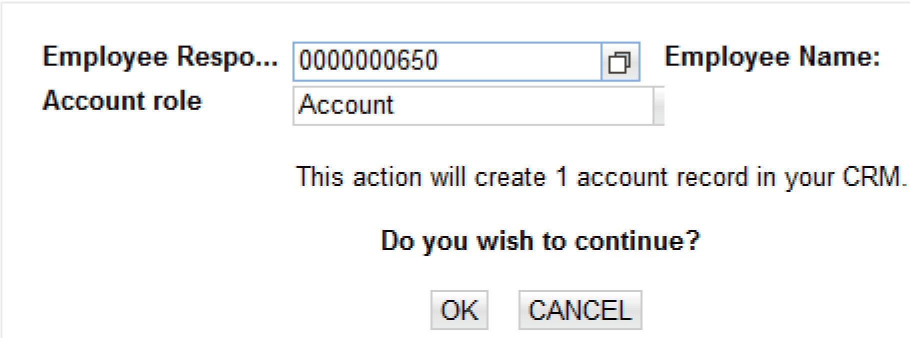
With D&B360 you can leverage D&B data to enrich your account information. In addition you can use information from public sources to verify or enrich your account information.

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.
- 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.



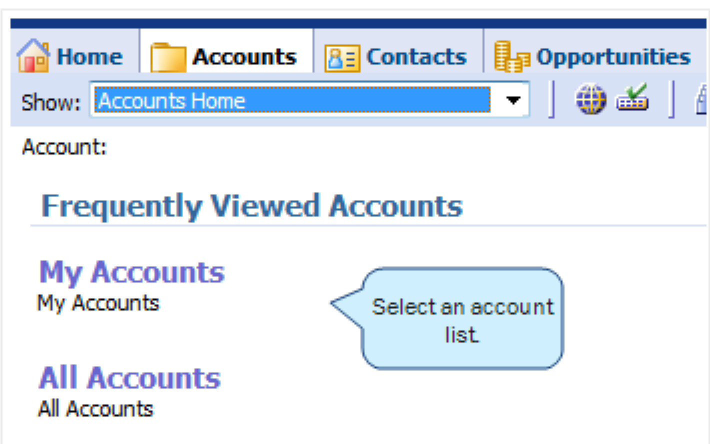
Leveraging ROW

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.

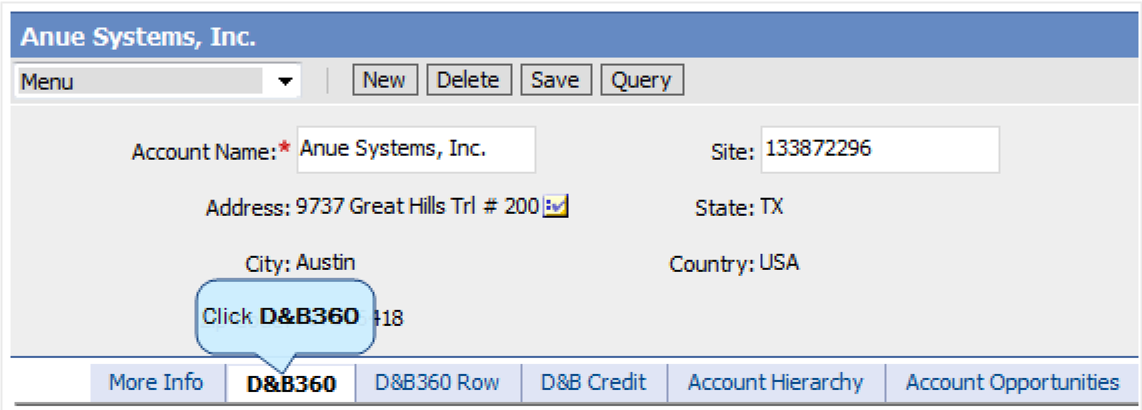
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



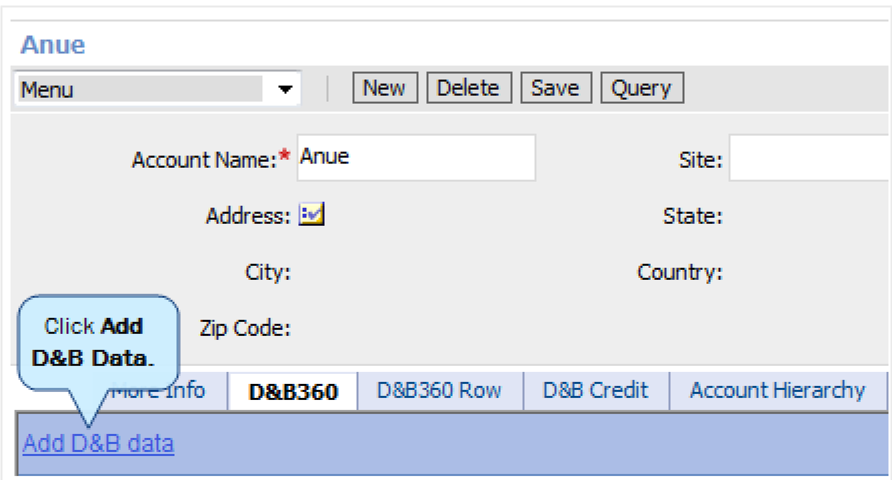
2. From the list of accounts that display, select an account that you want to add D&B data to. You can also click an account in your **Recent Accounts** list that needs D&B data.

   The details for that account display.

3. Click **D&B360**.

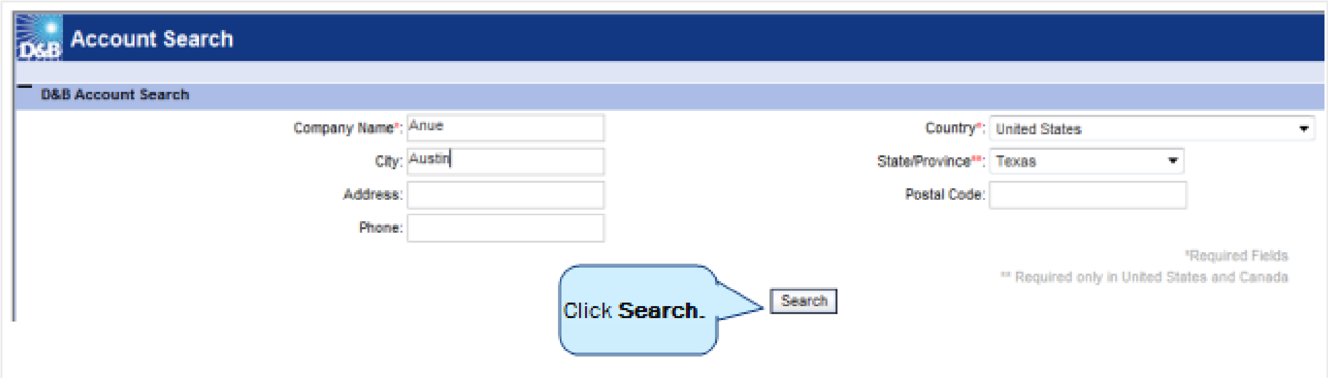


4. Click **Add D&B Data**.



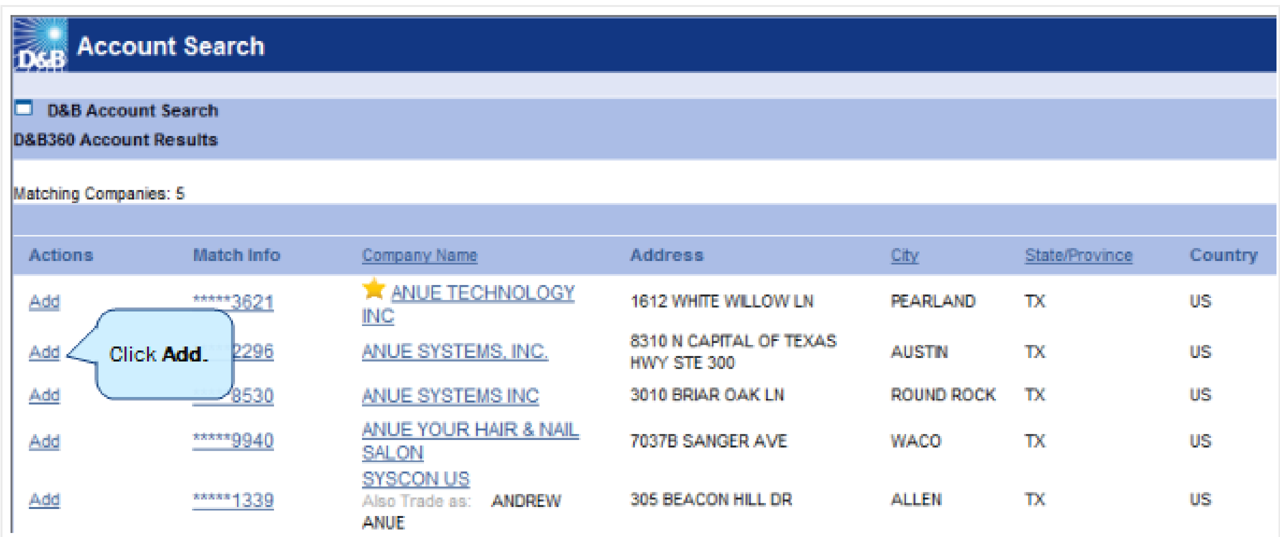
The **D&B Account Search** area opens with the **Company Name** field already populated with the name of the company from your search.

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**.

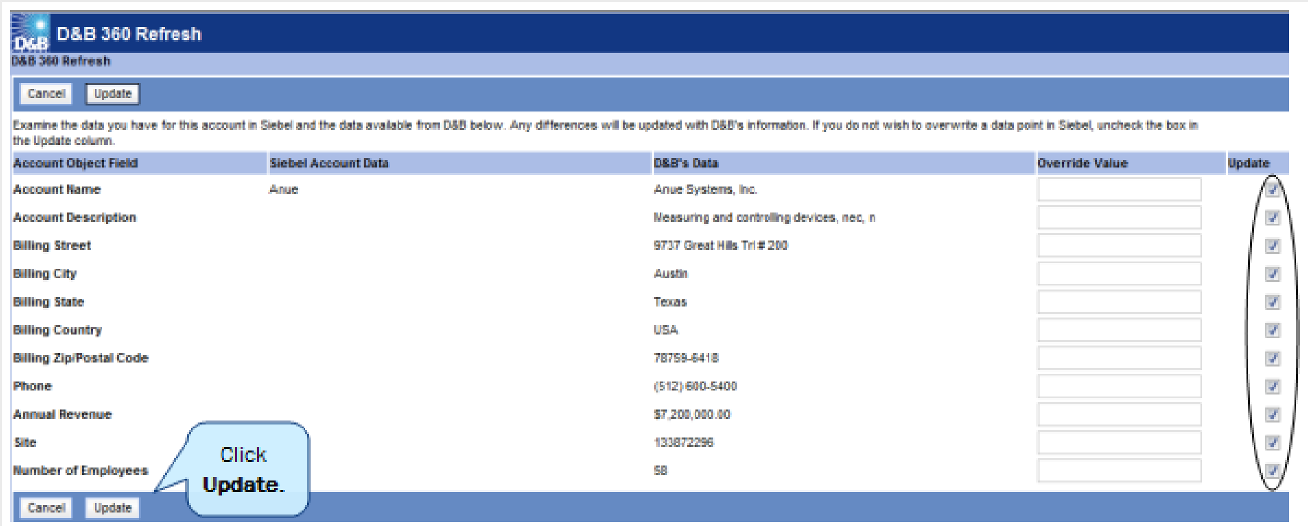


The **D&B Account Search** window **D&B360 Account Results** area displays a list of companies.

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



9. 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.

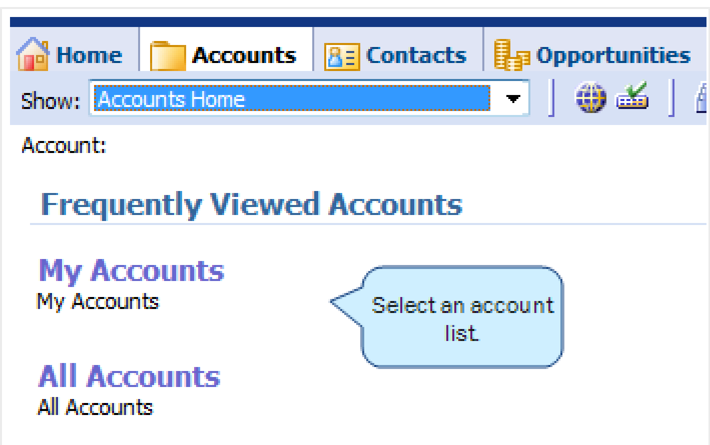


10. To update your account with the selected D&B data, click **Update**.

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.

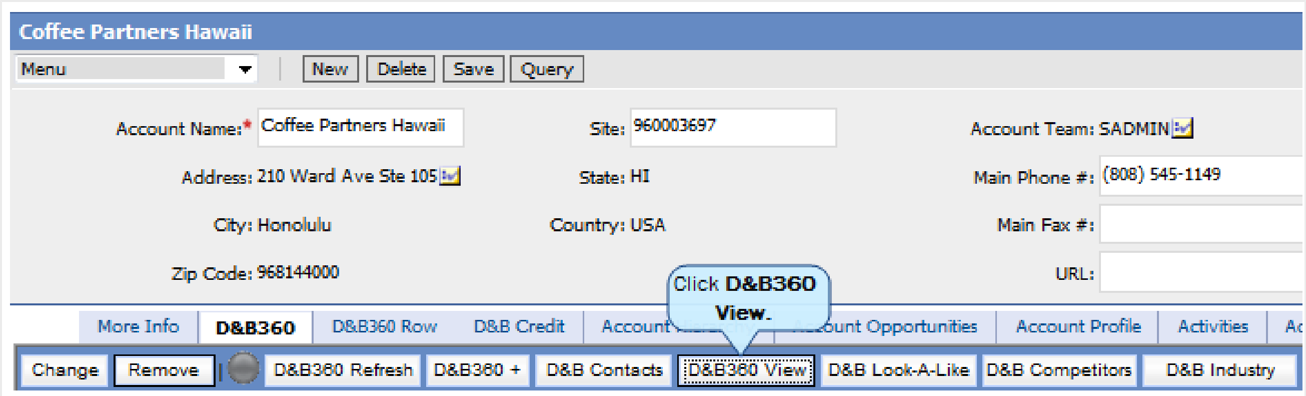
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



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**.



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

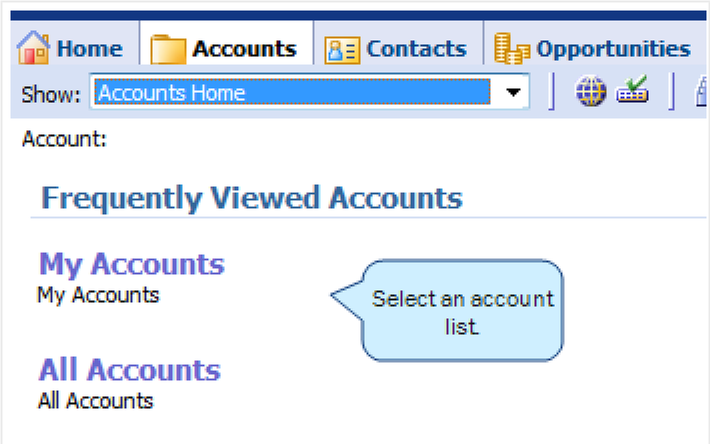
4. To become more familiar with the data, find a specific related account, or to prepare to add one of the listed accounts as a new account, review the data in this window. Green, yellow, and red icons next to an account indicate its risk level, (see "Identifying D&B360 Standard Options and Icons" on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

Finding Industry Information about Existing Accounts

Industry Information powered by First Research is 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

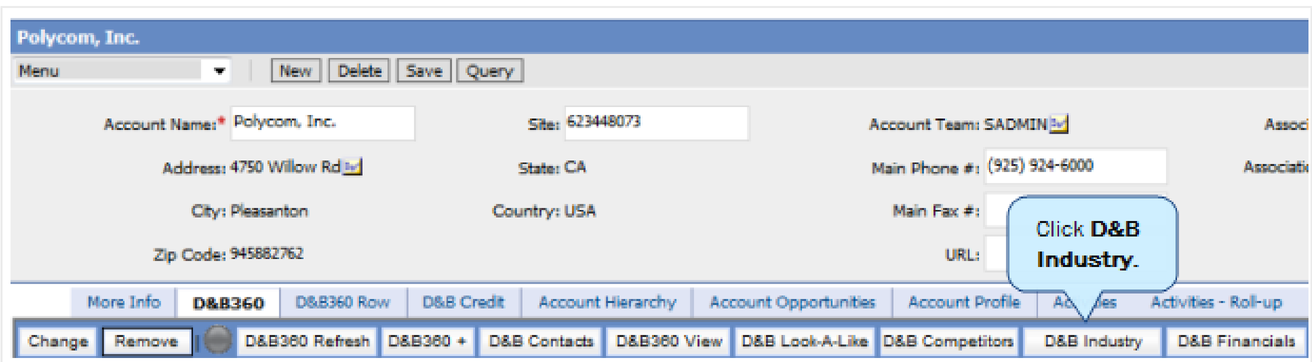
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



2. From the list of accounts that display, select an account for which you want to add D&B Industry 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 Industry**.



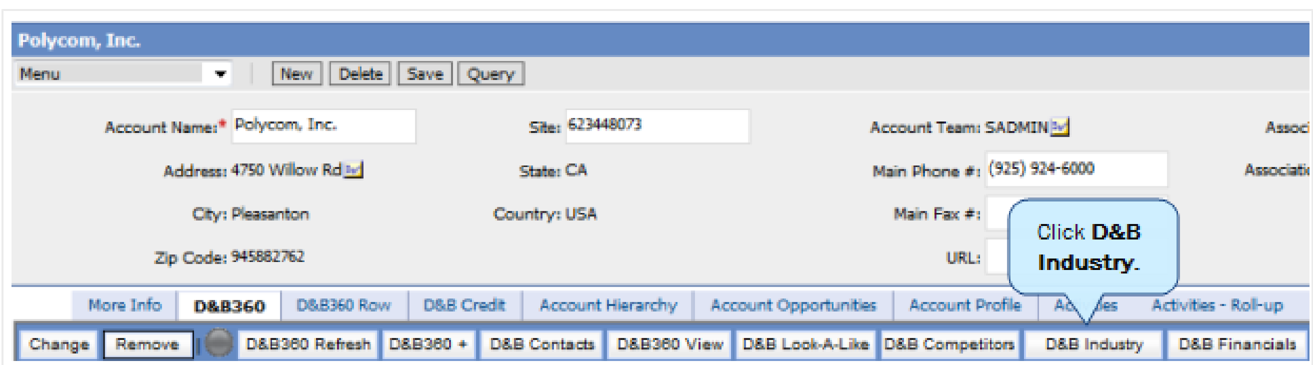
The **D&B Industry Details** window for the account you selected opens. You will see a list of the industries provided by First Research that are mapped to this account through their SIC code.

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

Adding an Industry Association

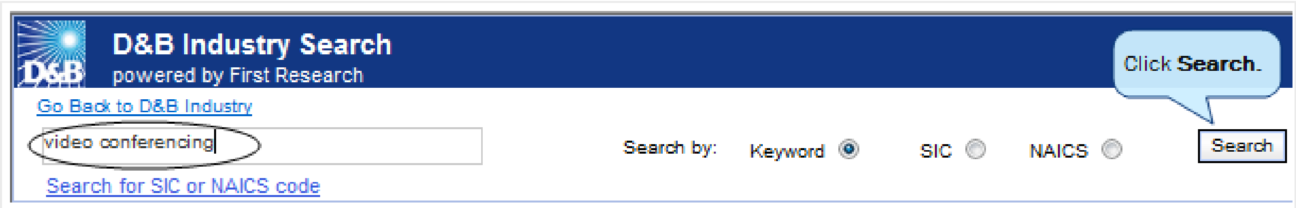
If you don't see the type of industry you are interested in already associated with the account, you can add an industry association.

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

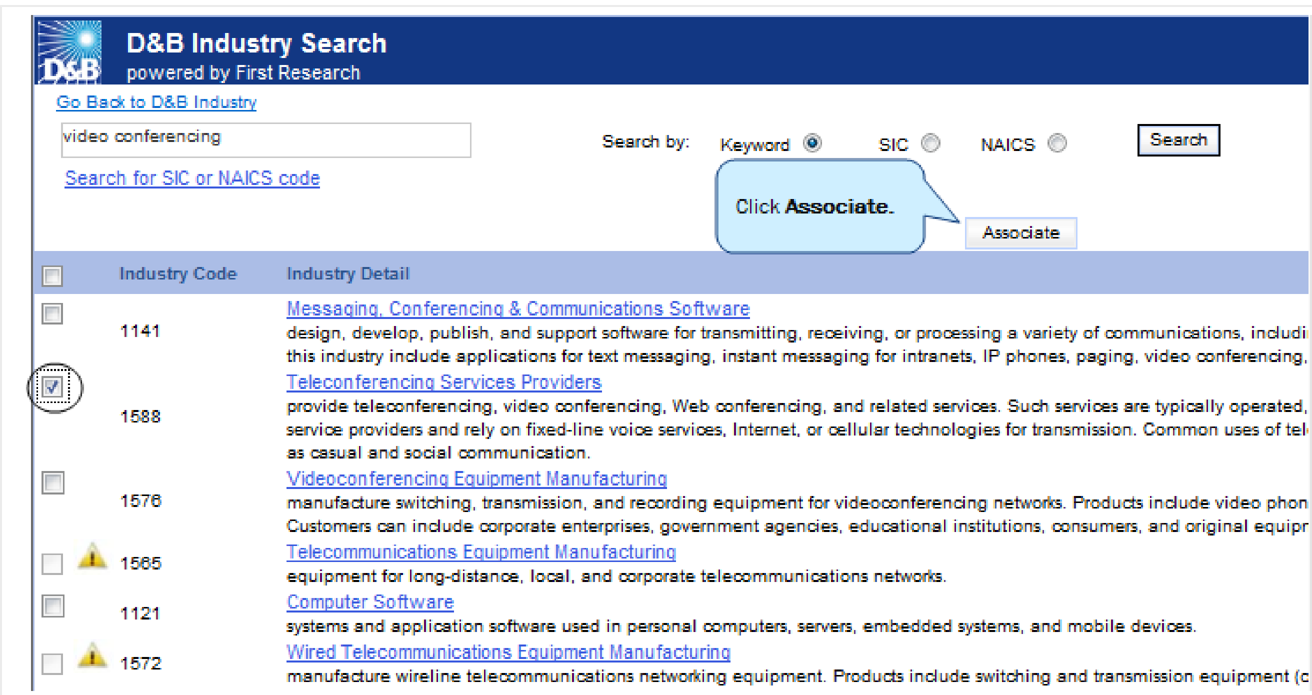


2. To open the **D&B Industry Search** window, click **Add Industry**.

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



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

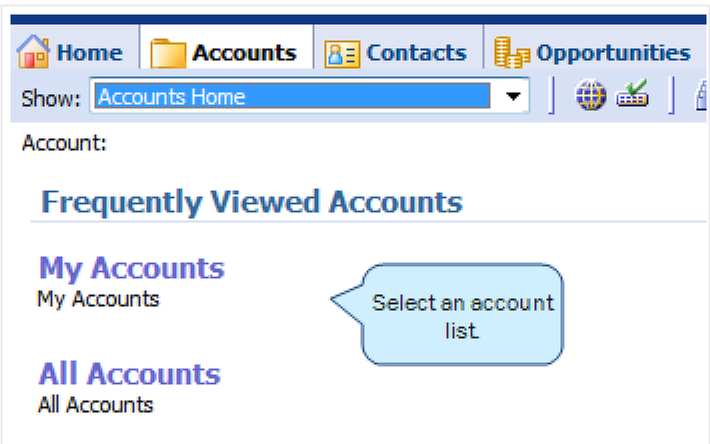
D&B Industry Information from First Research provides Sales and Marketing users with deeper insight about industry drivers and how these might affect a company. The information available includes:

- 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.

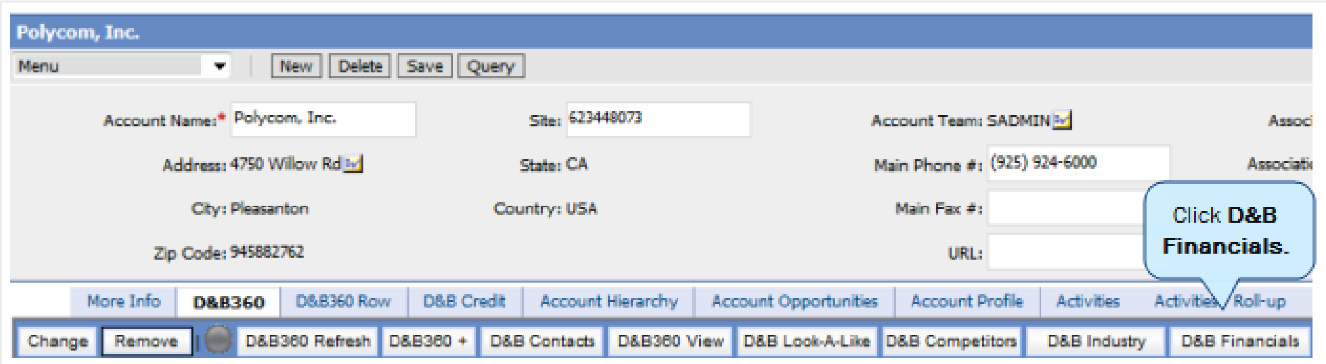
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



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.

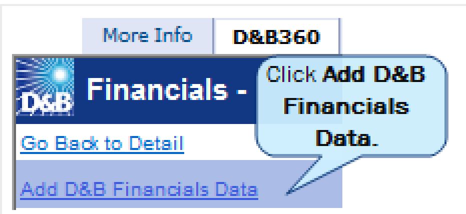
   The details for that account display.

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



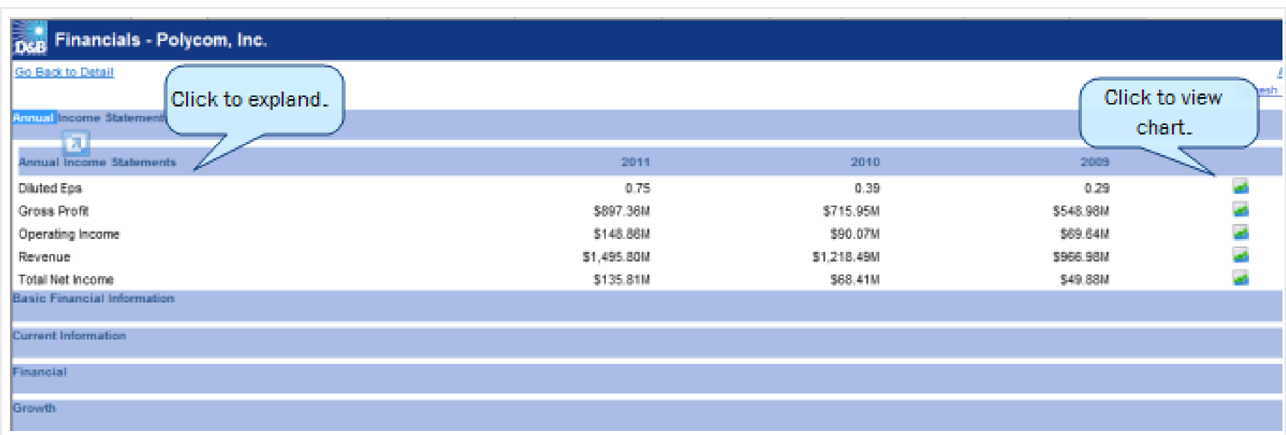
The amount of financial data available varies by company.

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



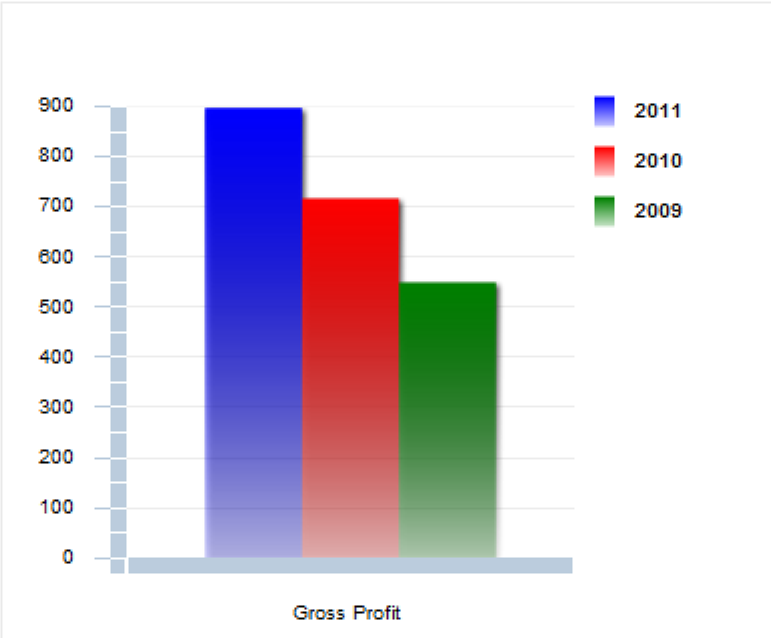
The **D&B Financials** information displays for the account you selected.

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.

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.

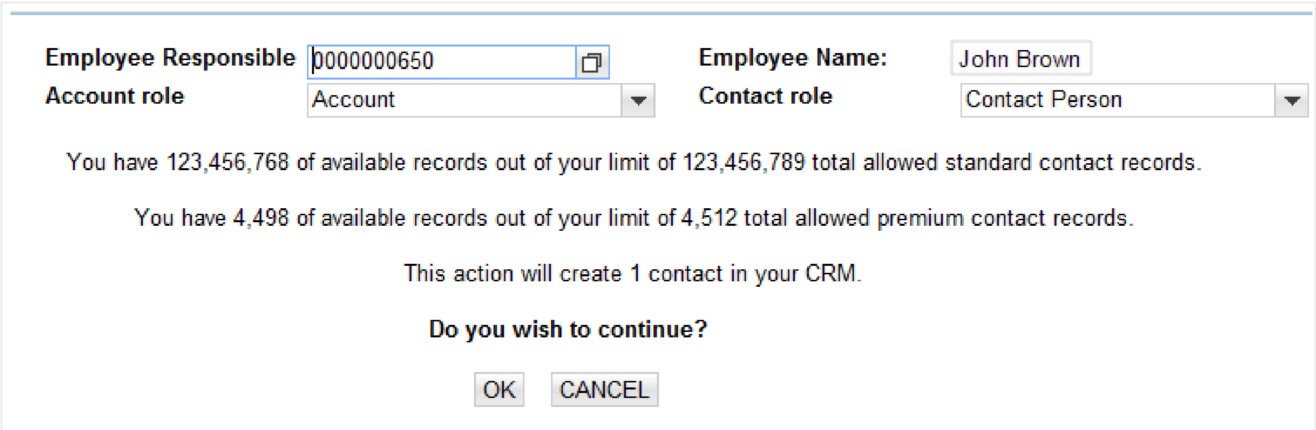
A yellow triangle with the letter *A* indicates an existing account.

A yellow triangle with the letter *C* indicates an existing contact.

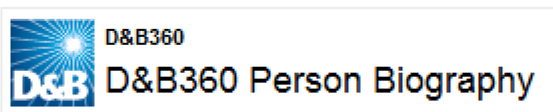
A yellow triangle with the letter *L* or *O* indicates an existing lead or opportunity.

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.



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

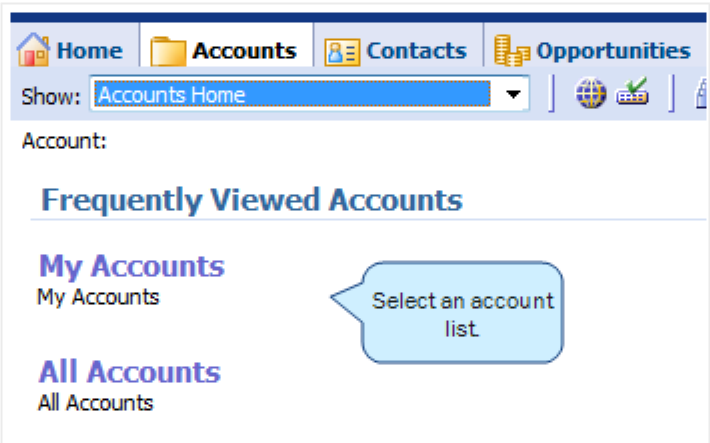
You can use Rest of World (ROW) as an information source for news about a company and link to news stories directly from the windows where you are working. For more information, see "Leveraging ROW" on page 5-2.

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.

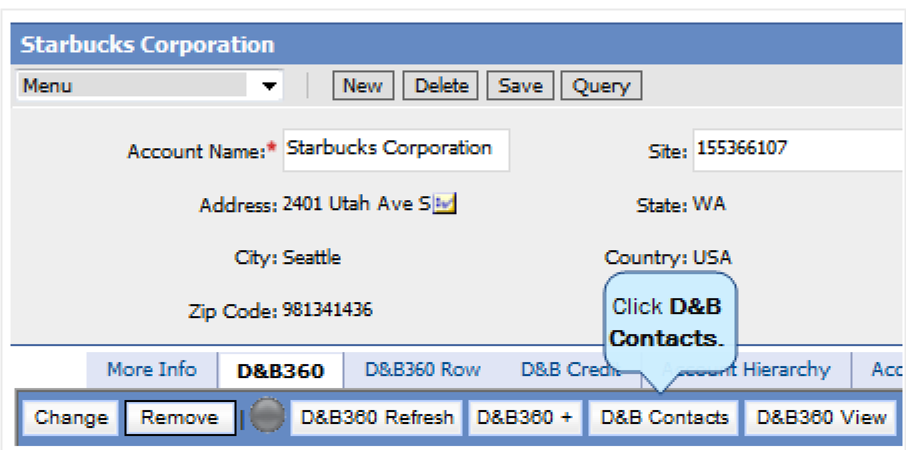
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



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.

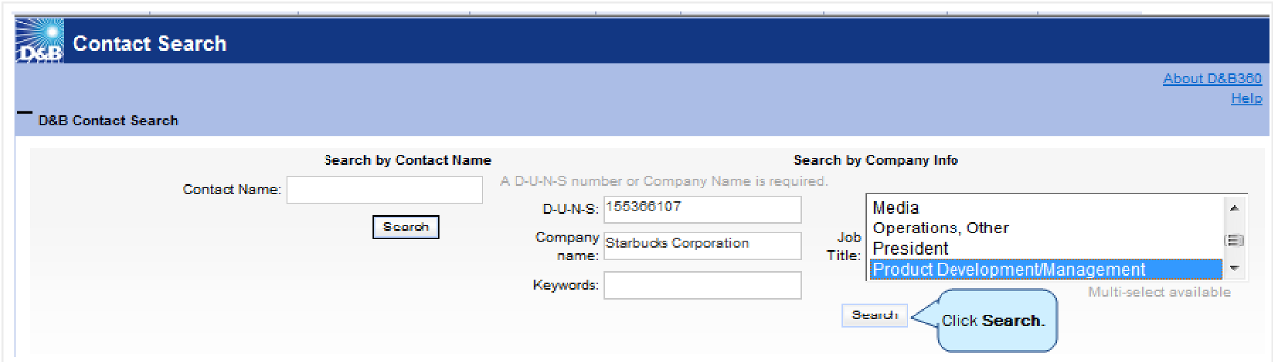
   The details for that account display.

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.



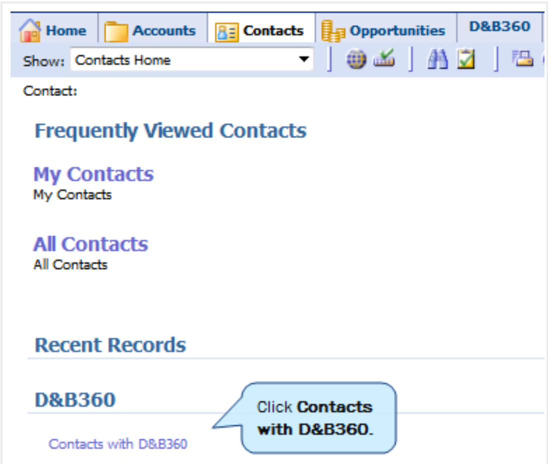
The **D&B Contact Results** window displays a list of contact matching your search criteria.

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

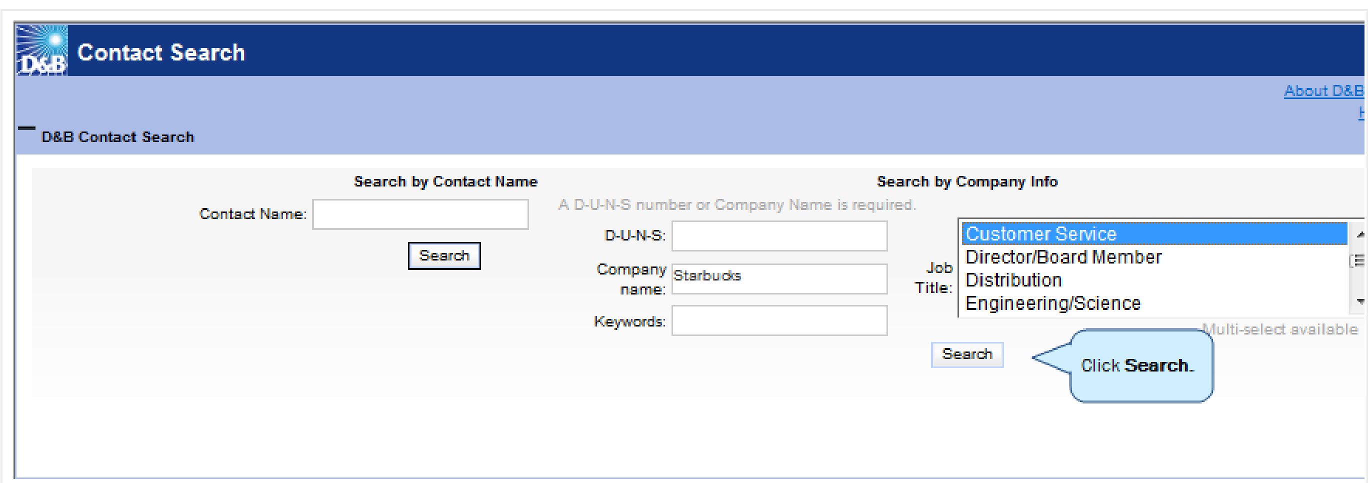
- From the **Contacts** menu or from the **D&B360** menu, select **Contacts with D&B360**.



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

1. In the **Contact Search** window **Company name** field, type the name of the company as the criteria for search.
2. 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.
3. 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.

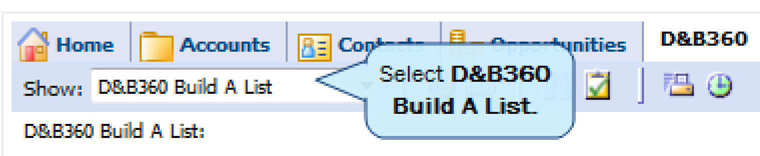
Note: To review the meanings for the icons used in this window, see "Identifying D&B360 Standard Options and Icons" on page 2-5.

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**.

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

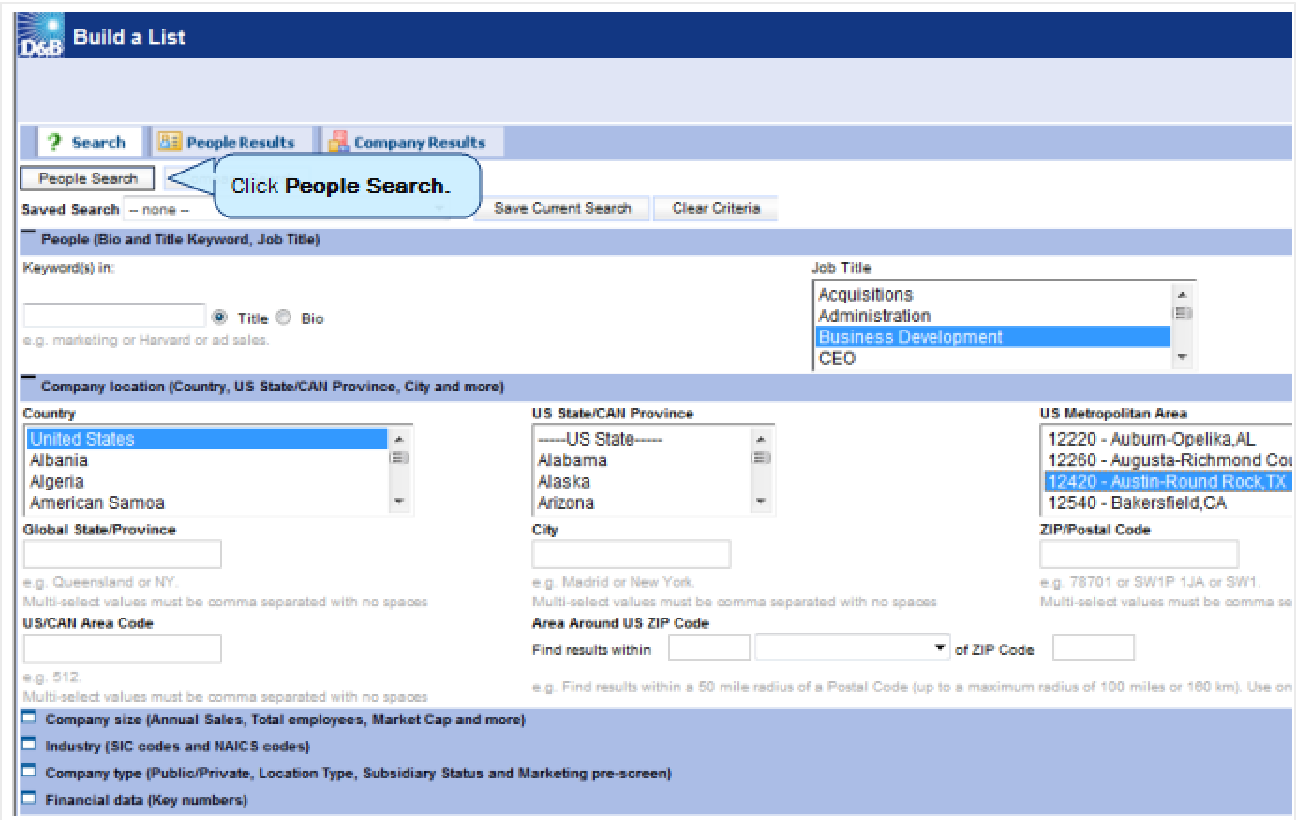
Adding a Contact Using Build-A-List

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



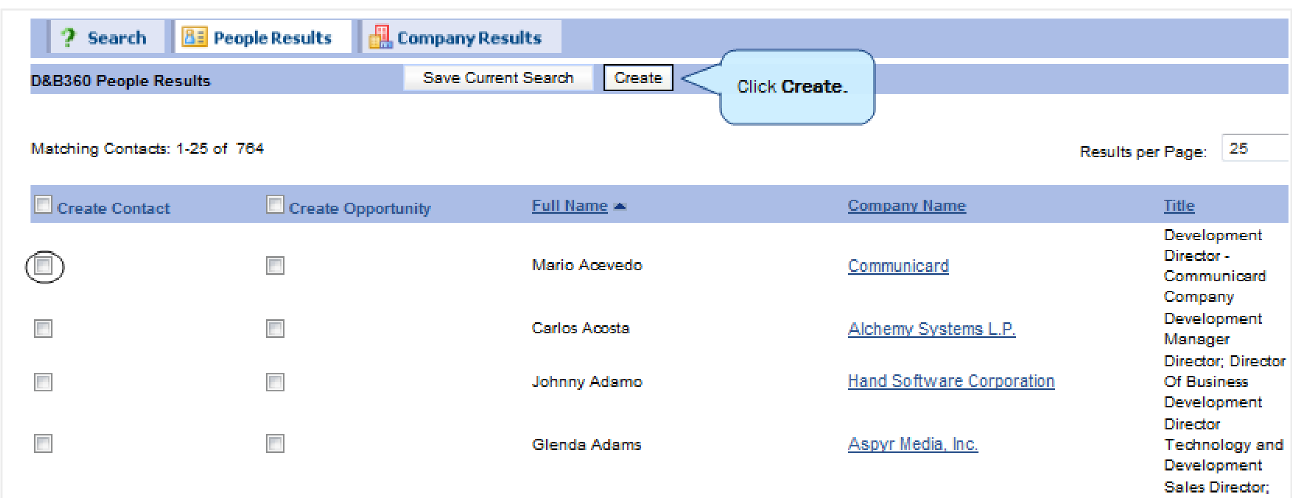
The **D&B360 Build A List** window opens.

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**.

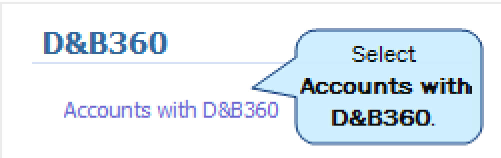


Note: A yellow status indicator displays when an account is being created. A green status indicator displays when the account is created.

Merging Duplicated Contacts

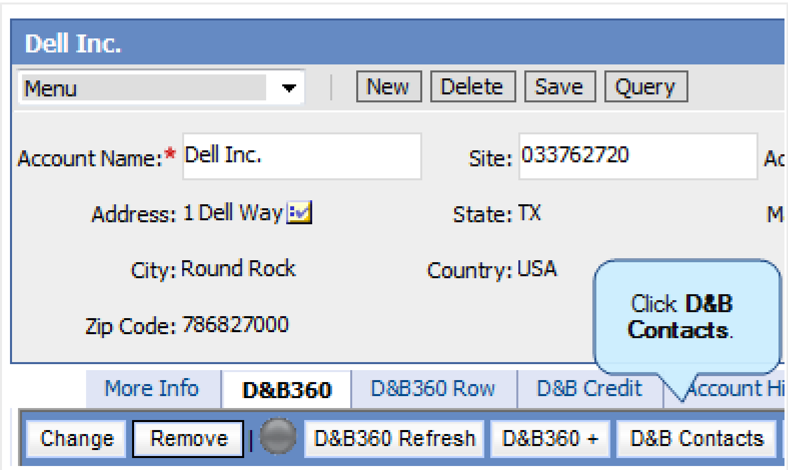
You can use the merge function when you have contact information in your CRM that did not come from D&B. In some cases, you might have more information because of the working relationship you have with this contact. However, in many cases the D&B information might be more current. To review information 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.

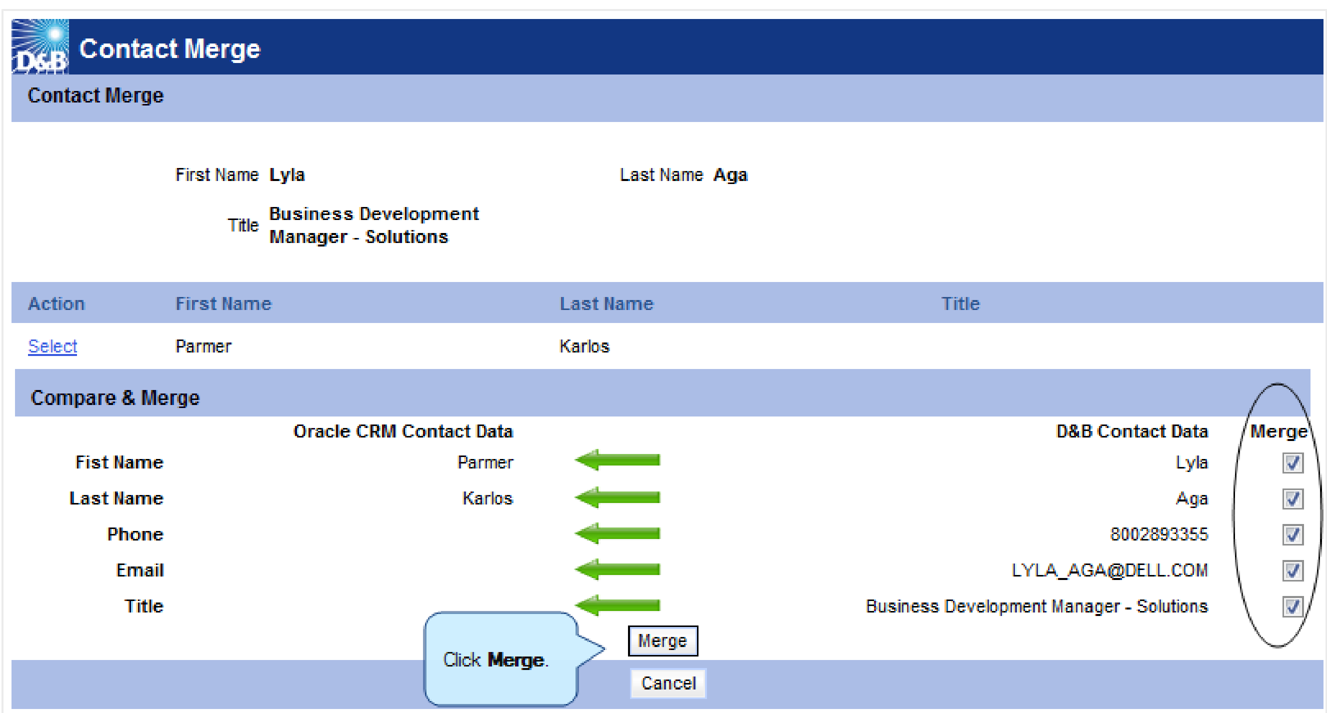
4. Next to a contact you believe might be duplicated, click the pencil icon.

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.

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

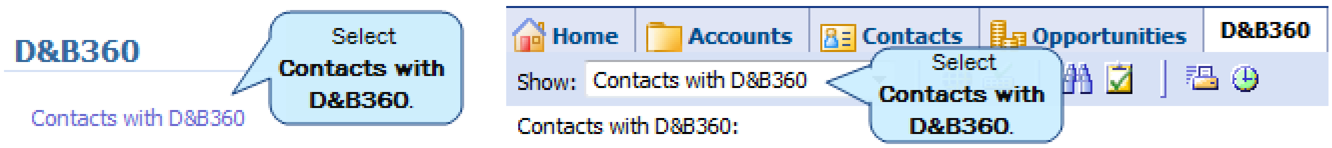
You can use Rest of World (ROW) as an information source for news about a company and link to news stories directly from the windows where you are working. For more information, see "Leveraging ROW" on page 6-1.

Creating a D&B360 Opportunity from a Contact

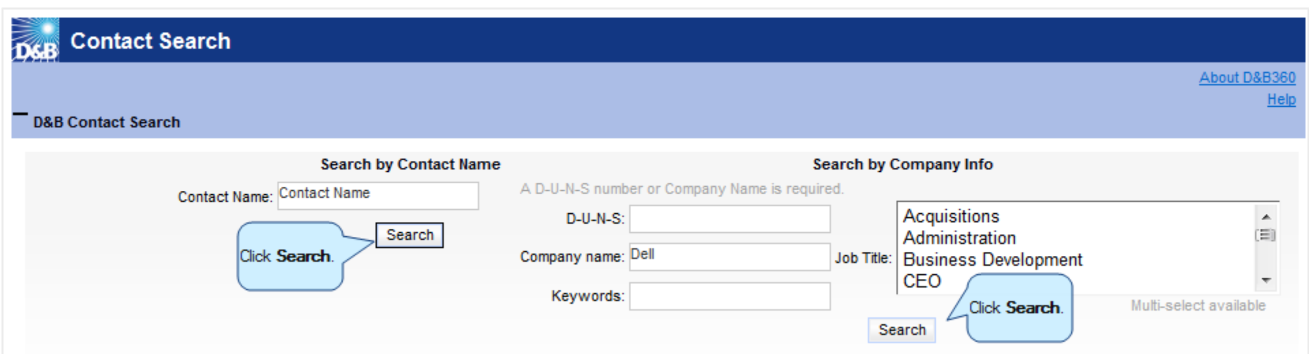
If you've already established rapport with a contact, he or she would make a good opportunity for you. Or, a contact at a specific company might be a good opportunity for you.

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**.

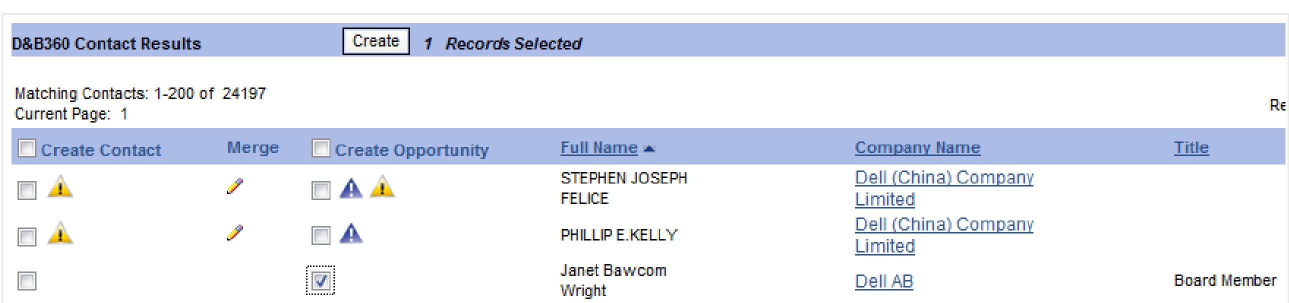


2. In the **D&B Contact Search** window, enter your search criteria, either **Search by Contact Name** or **Search by Company Name**.
3. In the appropriate area, either **Search by Contact Name** or **Search by Company Info**, click **Search**.



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.



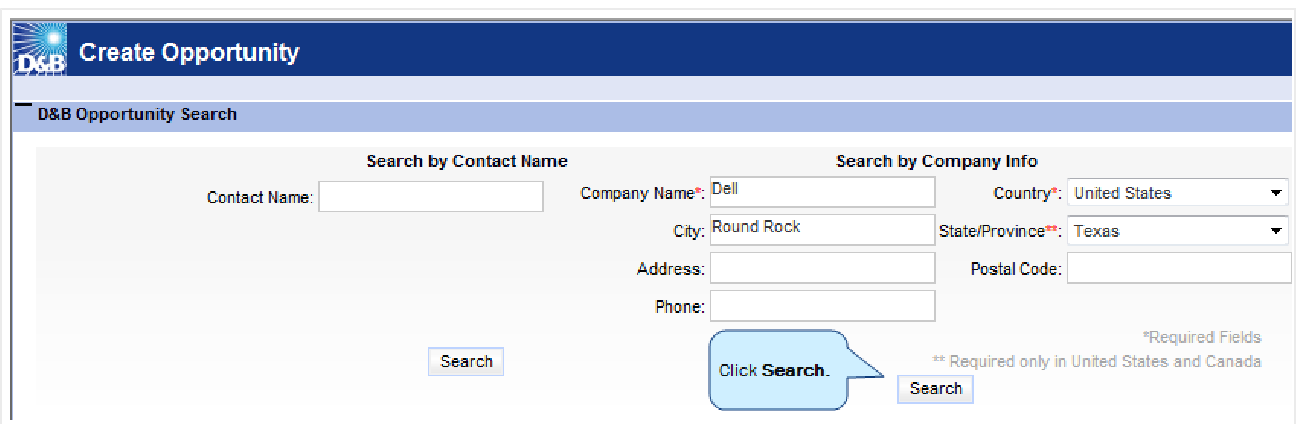
Note: A yellow status indicator displays when an account is being created. A green status indicator displays when the account is created.

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

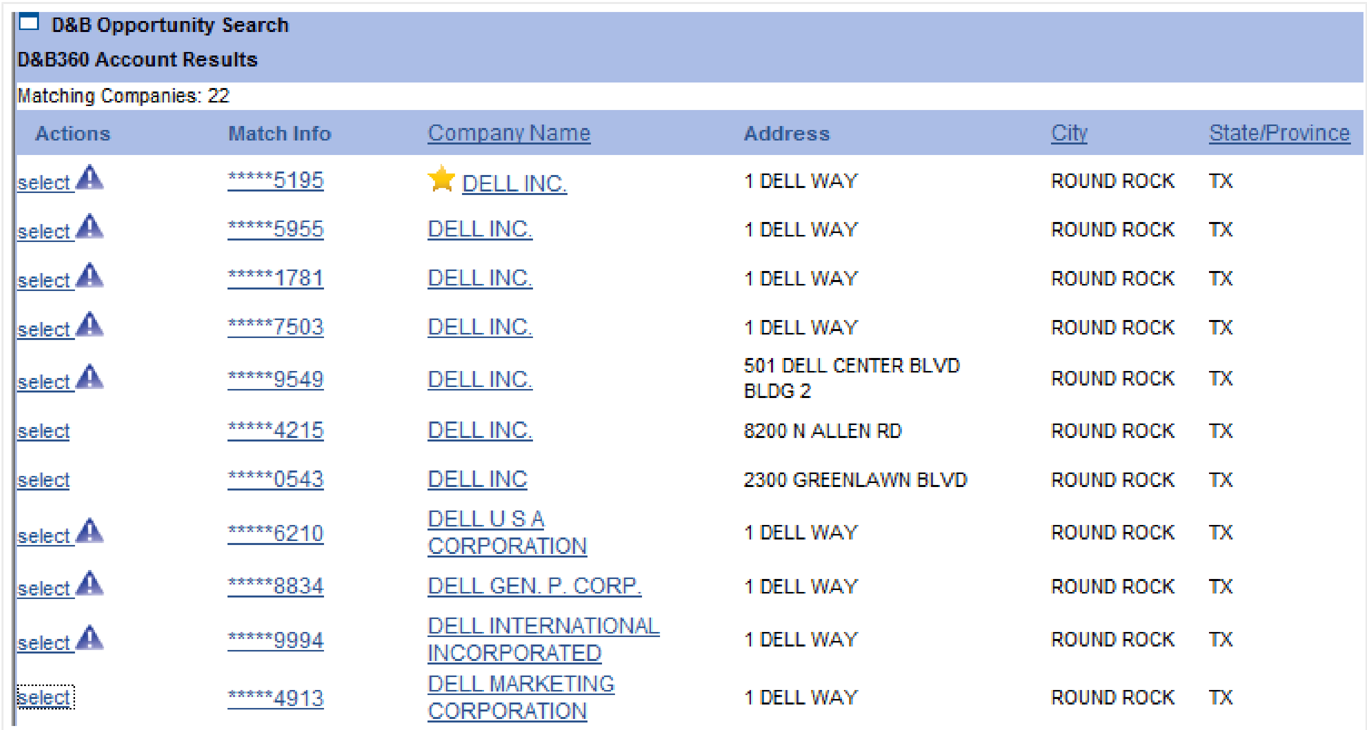
Alternatively, you can create a new opportunity from a contact by using the **Opportunities with D&B360** menu.

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**.



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.

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

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

   The details for this Opportunity display.

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

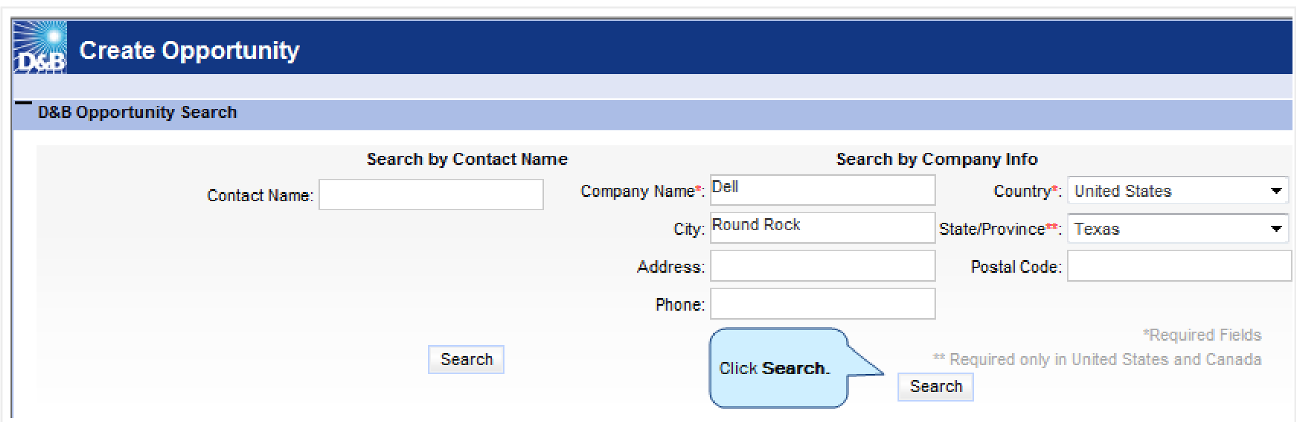
To create an opportunity manually, see "Creating a D&B360 Opportunity Manually" on page 6-7.

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.

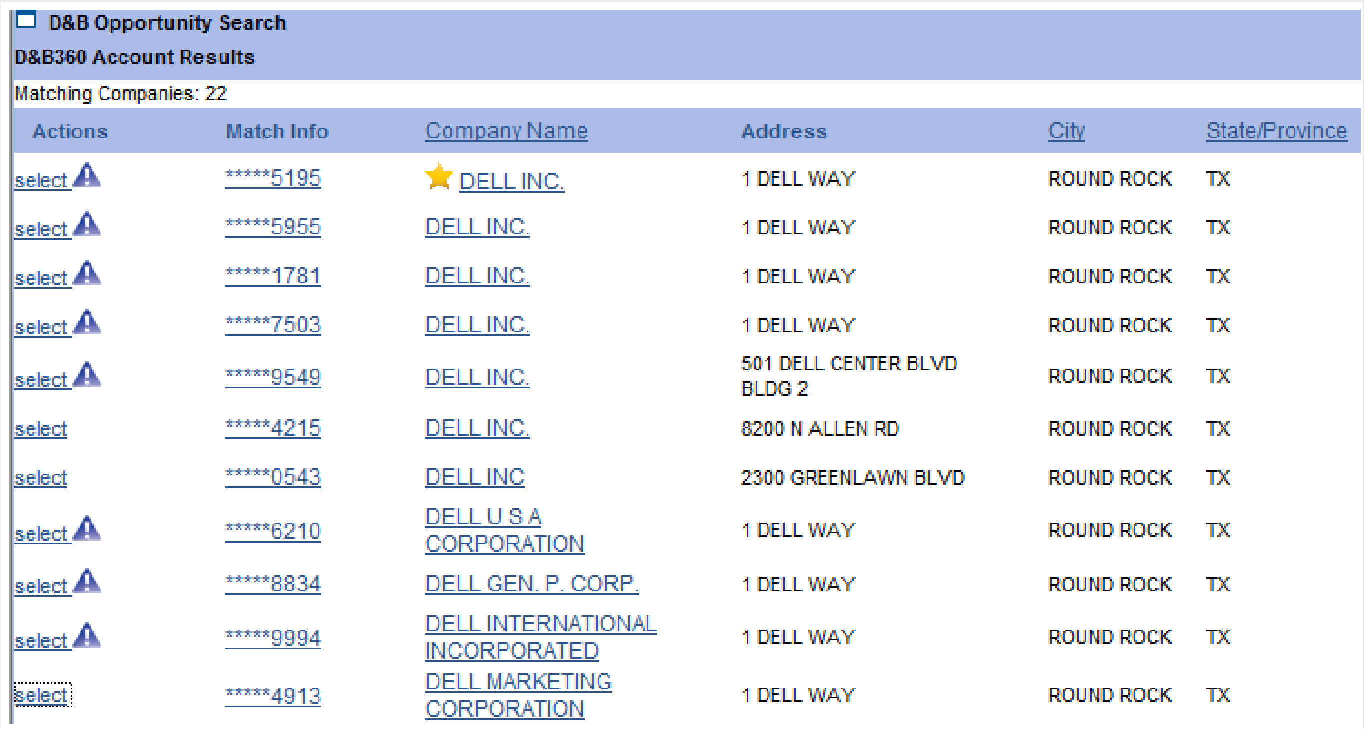
1. From the Siebel **Opportunities** menu or from the **D&B360** menu, select **Opportunities with D&B360**.

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.



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.

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

The details for this Opportunity display.

6. 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

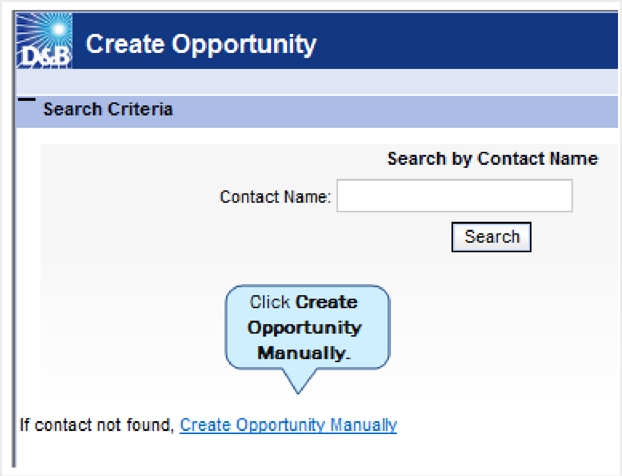
When you run a D&B People search to create an opportunity and the contact is not found, you can manually complete the process of establishing a opportunity.

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

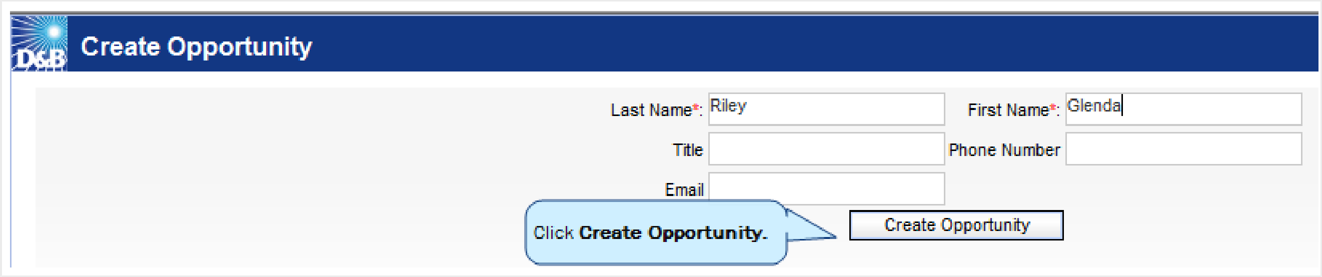
   — or —

   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**.



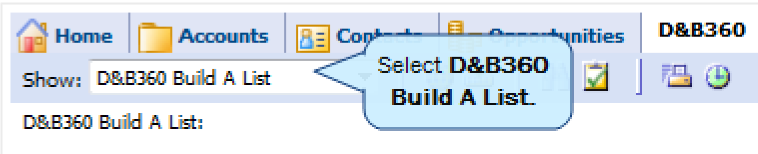
2. In the **D&B Create Opportunity** window, type the **Last Name**, **First Name** (both required), and any other contact information you have for this contact.
3. Click **Create Opportunity**.



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.

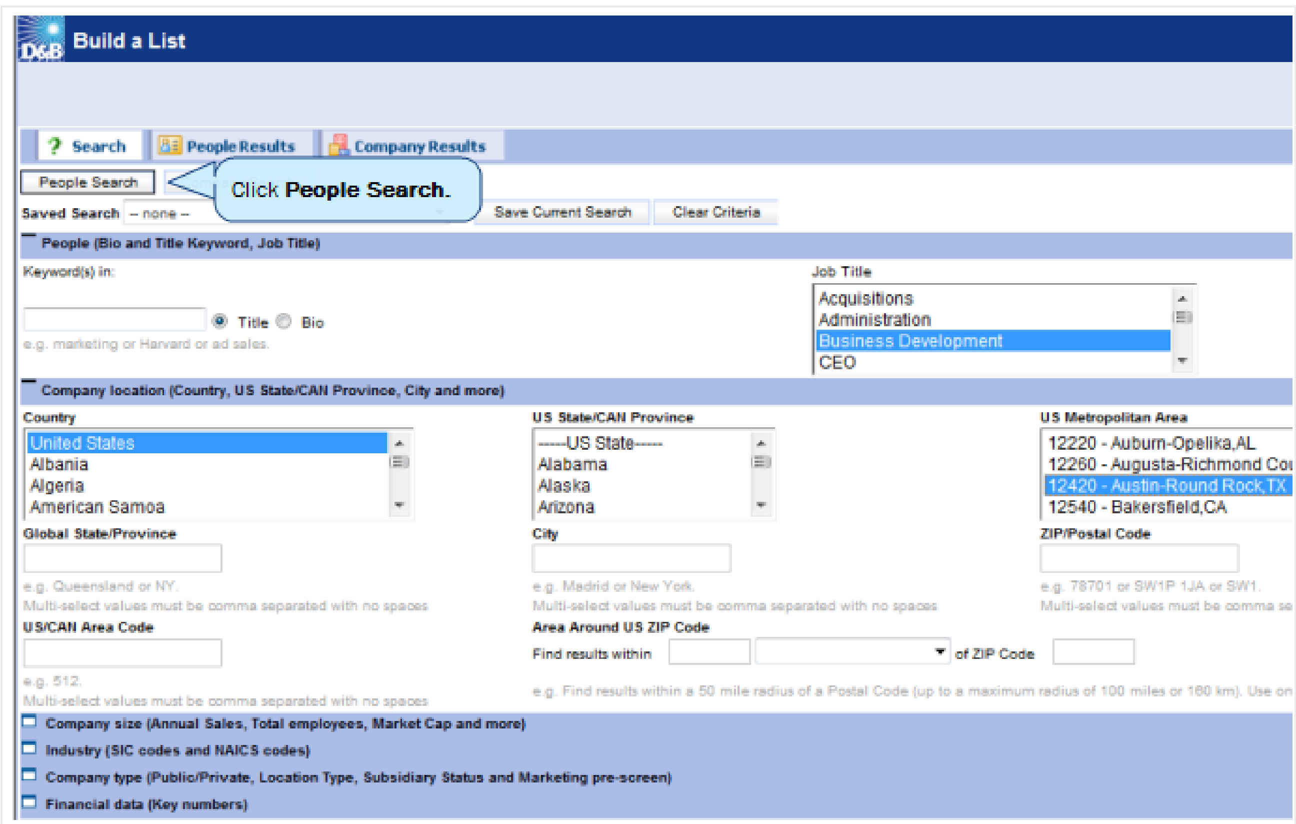
Creating a D&B360 Opportunity Based on a List of Criteria

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**.



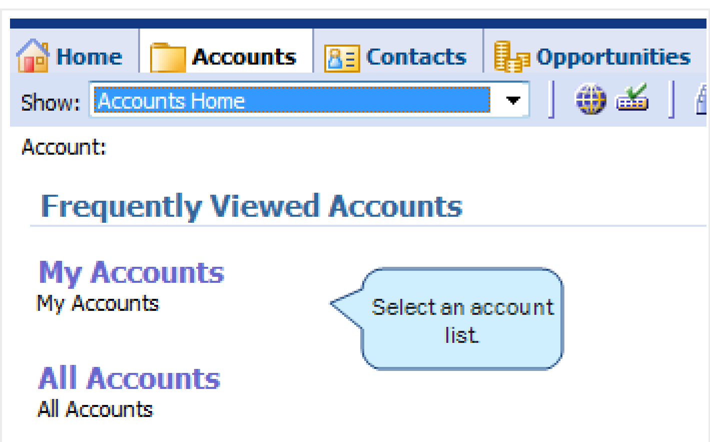
The **D&B360 People Results** window opens and displays a list of contacts.

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

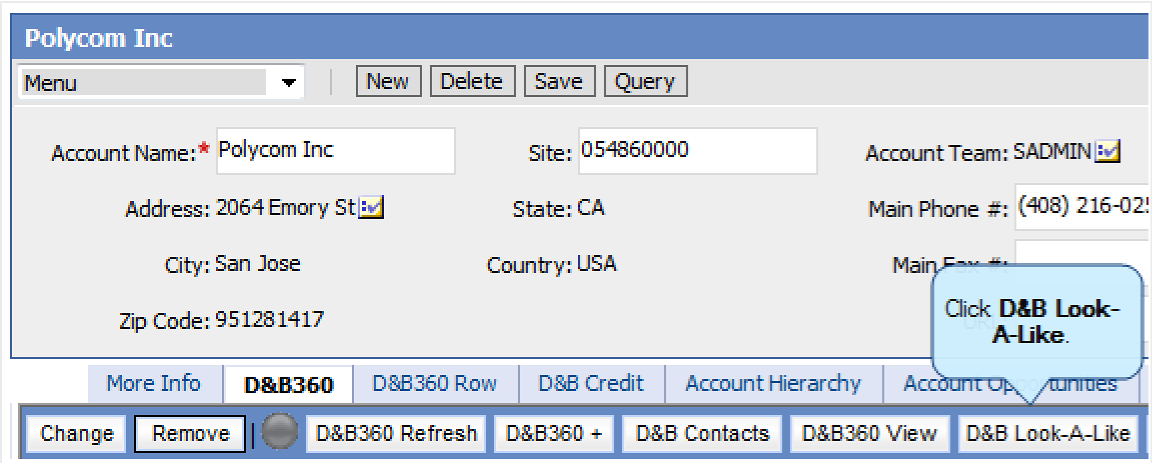
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



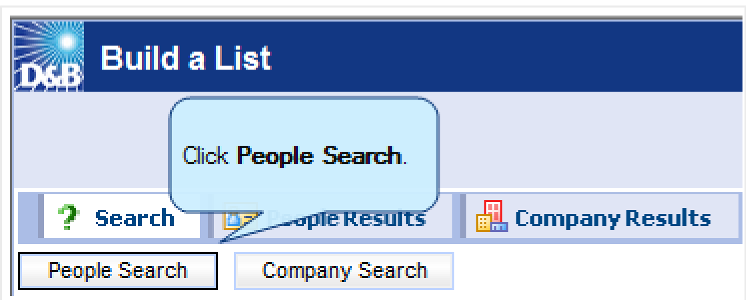
2. From the list of accounts that display, select an account that you want to review for adding contacts. You can also click an account in your **Recent Accounts** list.

The details for that account display.

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



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

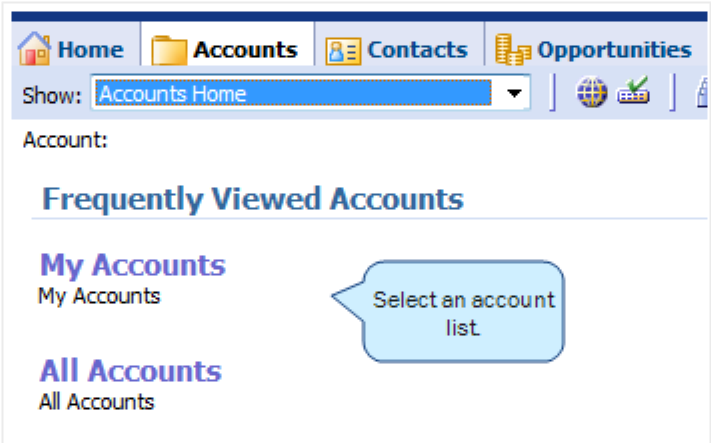


5. Review the People Results (not shown) and next to the candidate, select **Create Opportunity**.
6. Click **Create**.

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

Creating a D&B360 Opportunity from a Competitor

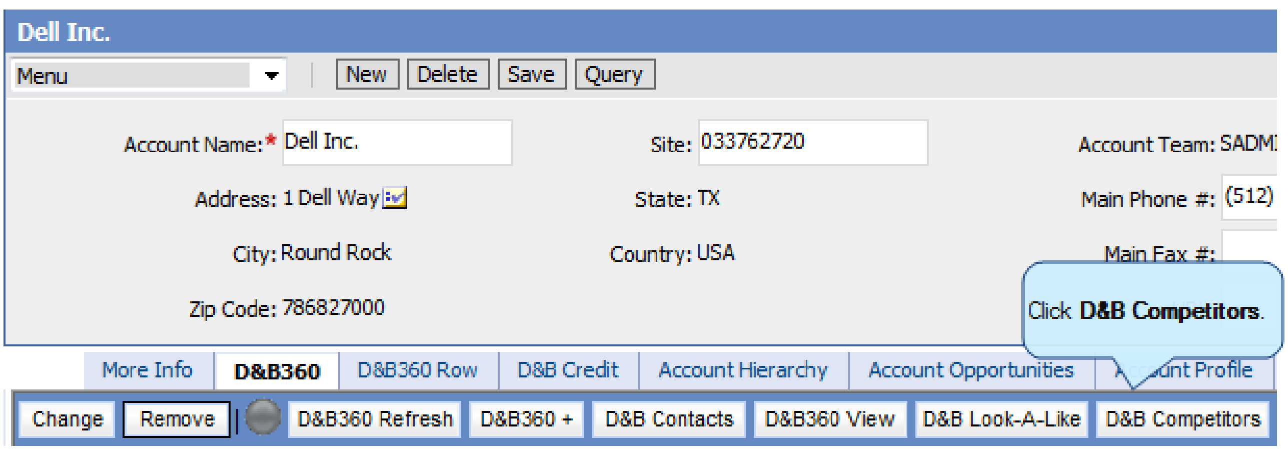
1. From the **Accounts** menu, select **All Accounts** or **My Accounts**.



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**.

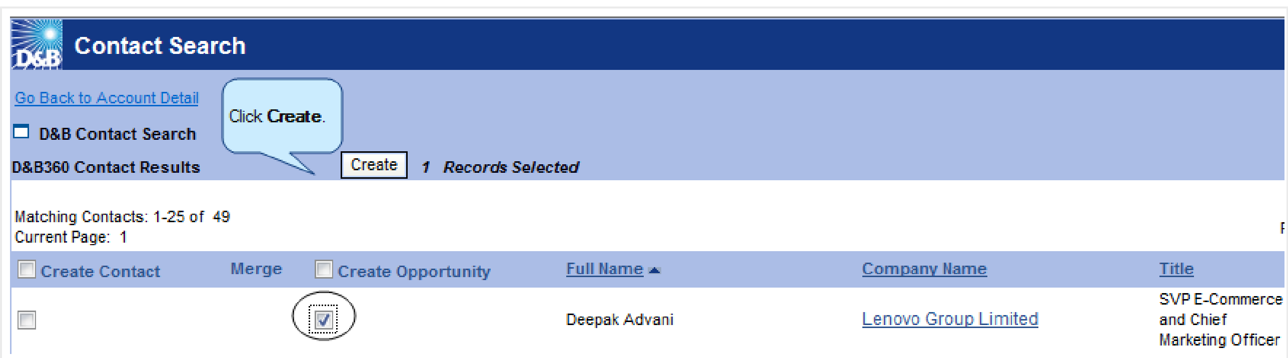


The **D&B Competitors** window displays the matching companies.

4. 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.

5. 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.

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	• 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

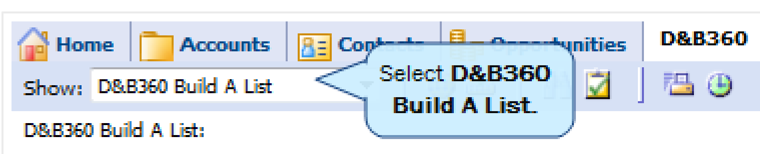
Criteria Categories	Specified Information	
PEOPLE SEARCHES		
People	Bio and Title Keyword	Job Title
COMPANY SEARCHES		
Company location	Country (select from list)	US State or CAN Province (select from list)
	US Metropolitan Area	Global State or Province
	City	Zip or Postal Code
	US or CAN Area Code	Area 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 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.

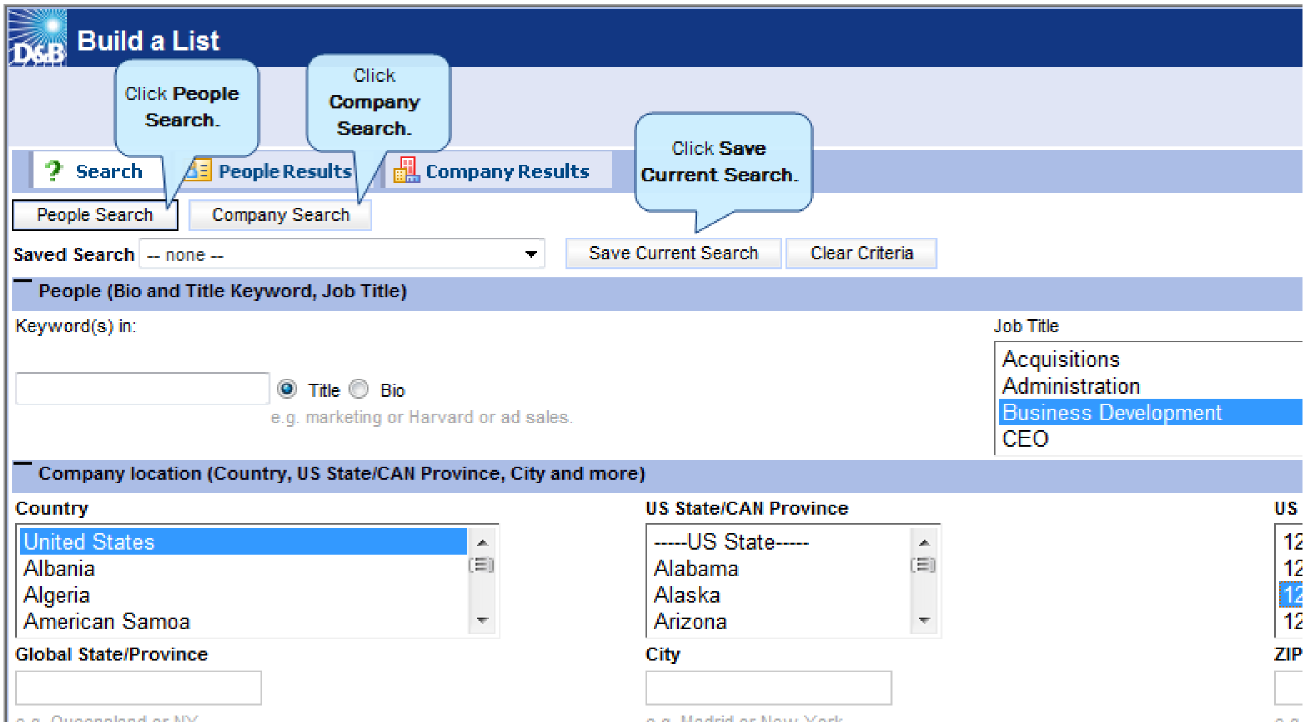
Saving Searches

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

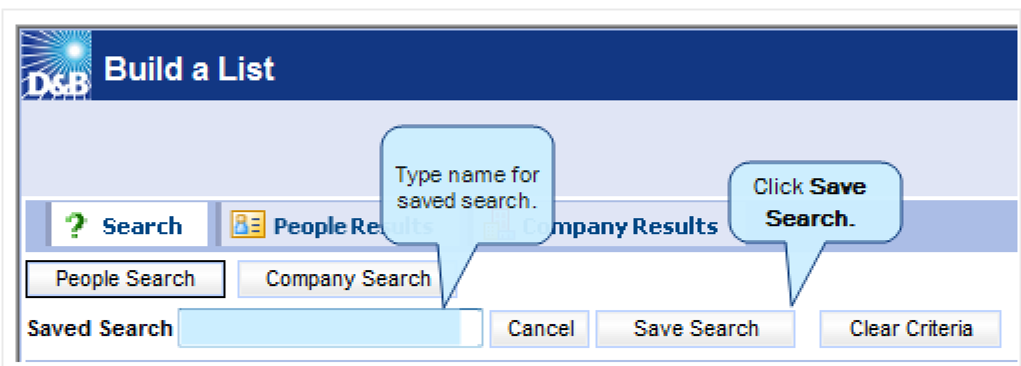


The **D&B360 Build A List** window opens, which includes several categories of information, each of which provides specific criteria you can select for your search.

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**.



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



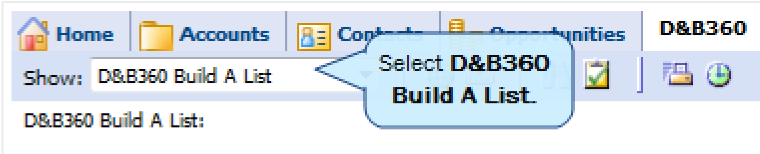
Your search is now saved, and you can use it again at a later time.

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

Using a Saved Search

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.

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