D&B Hoovers User Guide

Version 1.3
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Contents

D&B Hoovers Navigation Bar

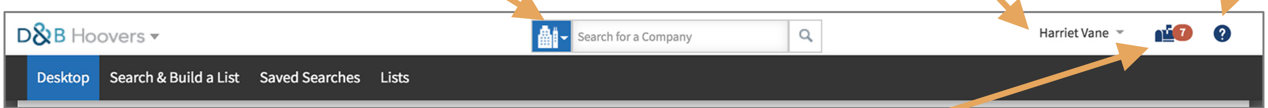
YOUR GUIDANCE SYSTEM FOR WORKING IN D&B HOOVERS

The navigation bar is your gateway to access search tools, saved lists, and support resources.

Global Search Bar
Easily launch a search from anywhere in the application with the Global Search Bar.

User Menu
Click your username to access user preferences.

Support & Training Menu
Access support resources.

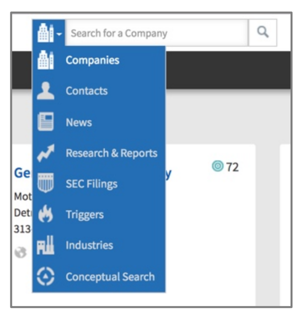


Notification Center
The number on the mailbox indicates how many notifications, such as trigger alerts, are available.

Navigation Menu Options

- Desktop: You can return to the desktop by clicking *Desktop* on the navigation bar or by clicking *D&B Hoovers* in the top right corner of the screen.
- Search & Build a List: This is your starting point to search for companies, contacts, news, trigger alerts, and industry information.
- Saved Searches: Mouse over *Saved Searches* to view a list of the most recently accessed saved searches or click to view all saved searches.
- Lists: Mouse over the word *Lists* to see the most recently accessed lists or click to view all.
- Page Help: Click here to turn on Help Tips for the features on that page.

Global Search Bar



Easily launch a search from anywhere in the application with the Global Search Bar. Mouse over the blue square to choose the type of content you want to search for, enter a name or keyword in the search box, and click the magnifying glass to search.

User Menu

Click your username to access the user menu. Options include User Preferences, your own personal Usage Dashboard, and Log Out. If your subscription includes Ideal Profile, you can access the Ideal Profile configurator here. More details can be found in the User Menu section.

Notification Center

Click the mailbox to view notifications of trigger alerts for items on your saved lists and new SmartList entries. The number on the mailbox icon indicates how many notifications you have.

Support & Training Menu

Click the ? icon to access support and training options.

D&B Hoovers Desktop

PERSONALIZE YOUR DESKTOP & MONITOR OPPORTUNITIES

The desktop is the D&B Hoovers homepage and your own personal hub where you can monitor information that is important you. Here you can pin content such as companies, contacts, and lists to your desktop for easy access. D&B Hoovers will dynamically push new content to those tiles as it becomes available, making it easy for you to log in and review the latest activity.

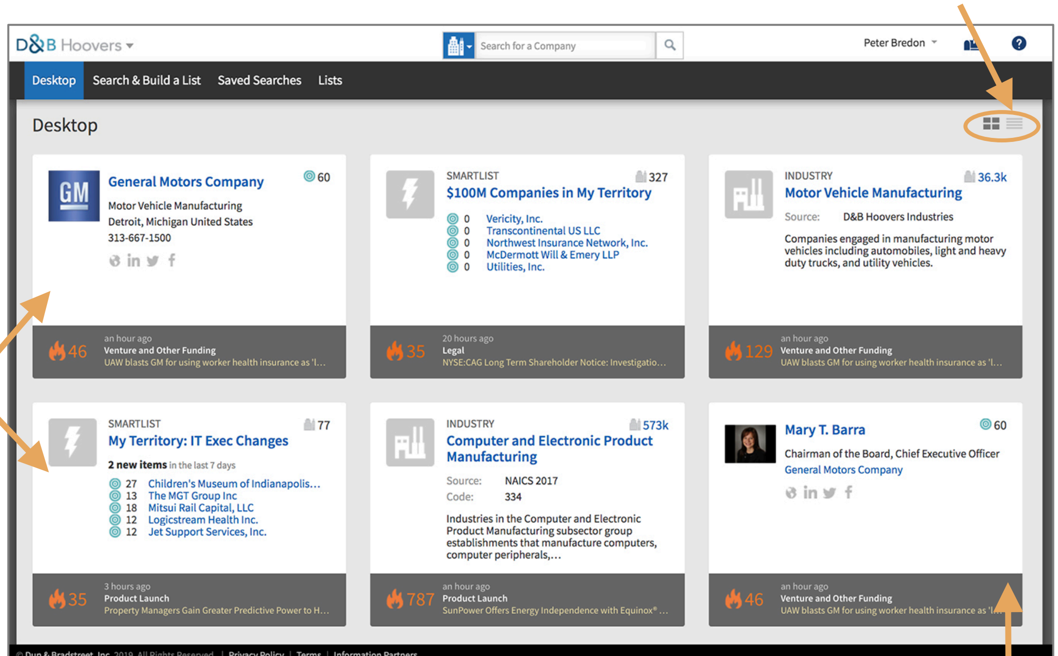
In this section we will:

- Take a tour of the desktop
- Learn how to pin content to the desktop
- Review how tiles can help you monitor breaking opportunities

A CLOSER LOOK AT THE D&B HOOVERS DESKTOP

Choose Tile or List View
Toggle between tile or list view of your pinned items.

Easy Access & Monitoring
The tiles shown on this desktop have been pinned here by the user. Easily access the companies, articles, or lists pinned here by clicking the name on the tile.



Be Alerted of Events as They Happen
The grey bars at the bottom of a tile show the number of real-time trigger alerts for that company or the companies on a list. Mouse over the grey bar to see the three most recent triggers.

Quick Tip: Position Tiles to Suit Your Needs
Personalize your desktop by dragging and dropping tiles to bring higher priority content to the top of the screen. There is no limit to the number of items that may be pinned to the desktop

How to Add Content to Your Desktop

It is easy to add items to your desktop. All you have to do is "pin" it.

1. Pinning is available throughout the entire platform wherever the push pin icon is present. Unpinned items display a gray pin, while items currently pinned to the desktop display a black pin. When you pin an item, it creates a tile on the desktop.
2. To remove items pinned to the desktop, hover over the tile and click the unpin icon that appears in the upper right corner.

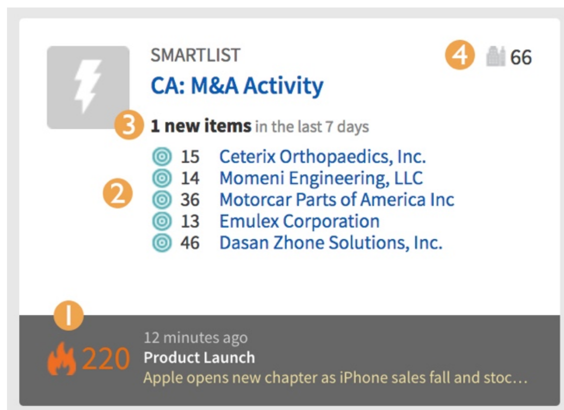
A CLOSER LOOK AT A DESKTOP TILE

Desktop Tiles Reveal Opportunity

Pinning a dynamic SmartList® to your desktop is just one way to automatically stay on top of breaking selling opportunities and newly available content.

1. Be Alerted to Opportunities

Company, contact, list, and SmartList tiles automatically display the most recent triggers from the last seven days. Hover over the grey trigger bar to reveal the three most recent triggers associated with the tile *(bottom image)*. A list or SmartList tile includes triggers related to the items on the list.



2. View Recent Additions to Your SmartList

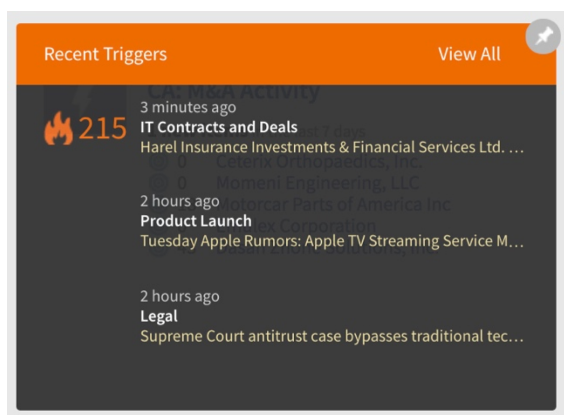
Displays the five most recent items matching your SmartList criteria.

3. Be Aware of New Opportunities

Displays a count of the new opportunities added to the SmartList within the last seven days.

4. Companies in List

The number in the top right corner shows how many companies are part of this list.



What is a Trigger?

A trigger is a real-time alert of an event that can notify you of a breaking opportunity, a potential threat to an account, or a reason to call. D&B Hoovers includes 70+ trigger types to help you monitor events such as executive changes, merger and acquisition announcements, contract wins, and more. Learn more about triggers and how to use them to monitor opportunities in the *Notifications and Notification Center* section of this guide.

What Can I Pin to the Desktop?

The following content types can be pinned to the Desktop:

- Companies
- Contacts
- Lists (Static)
- SmartLists (Dynamic)
- News Articles
- Trigger Alerts
- Industries
- Saved Searches

Global Search Bar

QUICKLY SEARCH FOR & ACCESS INFORMATION

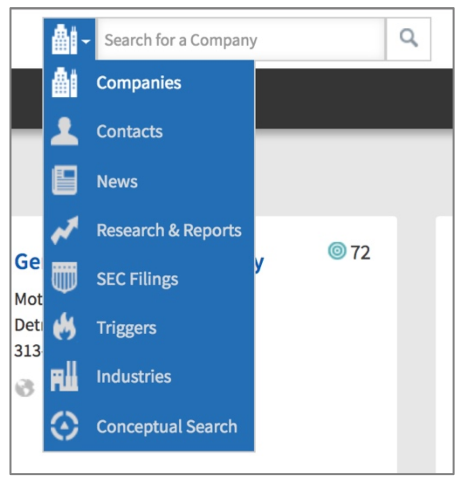
Located in the top center of the screen, the Global Search Bar can be used to easily launch a search or access content from anywhere in the application. The types of content available to search via Global Search depend on your subscription package.

The Global Search Bar can be used to:

- Initiate a search
- Quickly open a Company or Contact Profile
- Access recently viewed items

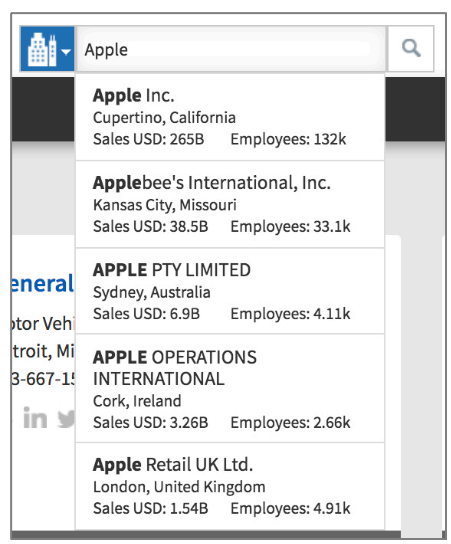
How to Initiate a Search via the Global Search Bar

1. Mouse over the blue square to choose the type of content you want to search for, such as companies, contacts, or industries.
2. Enter a name or keyword in the search box.
3. Click the magnifying glass to search.

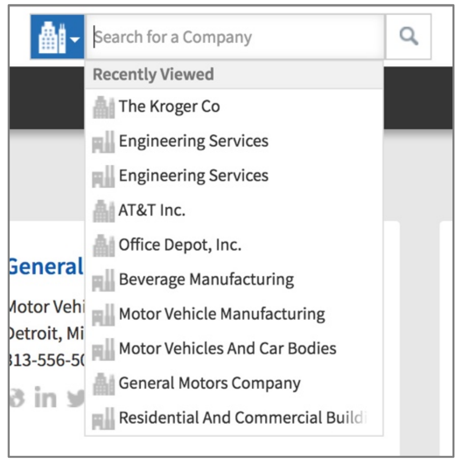


How to Quickly Find a Company or Contact via the Global Search Bar

1. Mouse over the blue square to choose companies or contacts for the search type.
2. Enter a company name or contact name in the search box.
3. A list of companies or contacts related to your search term will populate in the drop down menu. Click the appropriate item to open the profile.
4. If the provided suggestions are not what you are looking for, click the magnifying glass icon to search the entire database. You will be presented with a list of items that match your search term. You can further edit this list by clicking +*Add Additional Criteria* on the left side of the search results screen.



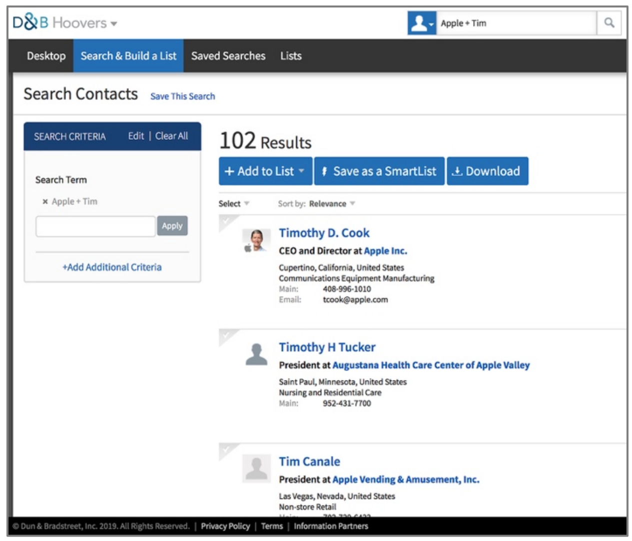
How to Access Recently Viewed Items via the Global Search Bar



1. Place your cursor in the search field on the Global Search bar.
2. The 10 most recently viewed items will display in the drop down.
3. Click an item to open it.

Global Search Bar Tips & Tricks

Quotes & Booleans



Place words in quotes to find an exact term. Further refine results by using location specifiers or Boolean operators like AND, OR, and NOT.

Company Name + First Name

Combine people and company names to find a contact. For example: search *Apple + Tim* to generate a list of people named Tim who work at a company with Apple in the name.

Company Name + Location

Combine company name and location information (state or city) to quickly find a specific branch within an organization. For example: *Tesco + Oxford*.

Company Name + Functional Group

Combine keywords and company name on a contact search to generate a list of contacts within a functional group at a company. For example: search *Best Buy + Marketing* to generate a list of all the marketing contacts at this company.

Conceptual Search®

Conceptual Search is a unique feature of D&B Hoovers that helps you connect topics or concepts to the businesses that are talking about them. For example, you could leverage Conceptual Search to identify a list of companies that are talking about security breaches in the news. Conceptual Searches can be initiated from either the Global Search Bar or the Search & Build a List Form.

Please visit the Conceptual Search section to learn more about this functionality.

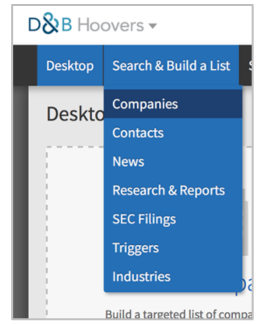
Search & Build a List Form

LEVERAGE FILTERS TO CREATE TARGETED SEARCHES & LISTS

D&B Hoovers provides more than 175 different search filters to help you quickly build targeted queries of companies, contacts, industry reports, news articles, and more.

In this section we will:

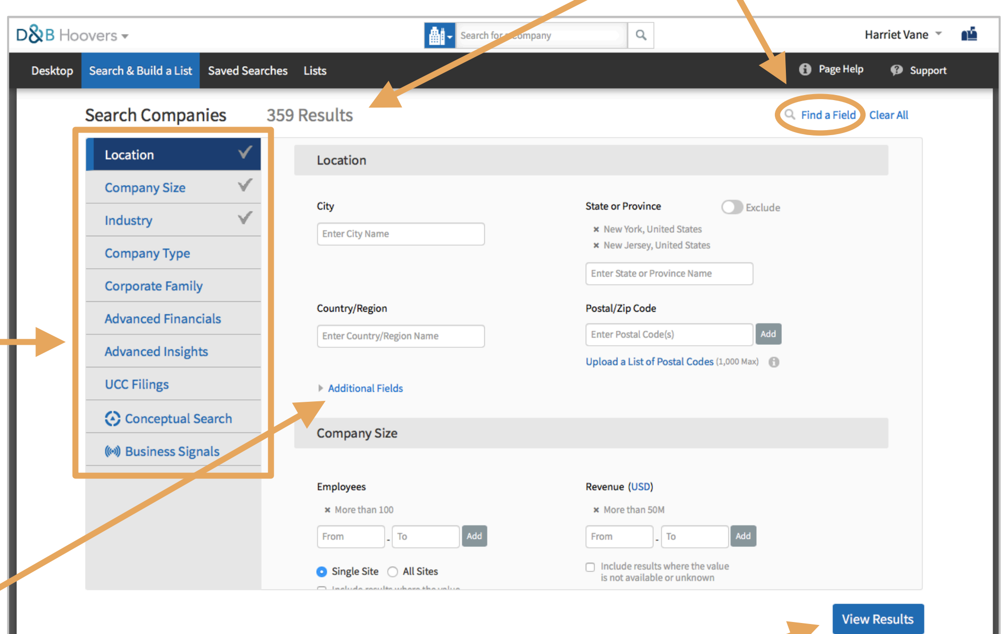
- Tour the Search & Build a List Form
- Review options for viewing and working with results
- Learn how to save lists and searches



Click *Search & Build a List* on the navigation menu and select the type of content you want to search.

A CLOSER LOOK AT SEARCH & BUILD A LIST

The search form is divided into sections, such as location, company size, and industry for easy navigation. To make it easy to find what you are looking for, the most commonly used search filters are showcased at the top of each section. Additional options can be accessed by clicking *Additional Fields* within a form section.



Results Count
As you add criteria, the number of items that meet your search requirements will display at the top of the screen.

Find a Field
Search for any field by name.

Search Criteria Panel
Choose the type of information you are interested in and easily add filters to refine results.

Reveal Additional Field Options
Provides options to add more specific criteria to your list.

View Results
Once you have applied all the search filters you want to use, click the *Results* button.

Editing Search Criteria & Working With Results

Once you've launched your initial search query, you can edit your search by changing, adding, or removing criteria. The results screen also provides options for viewing and sorting the data.

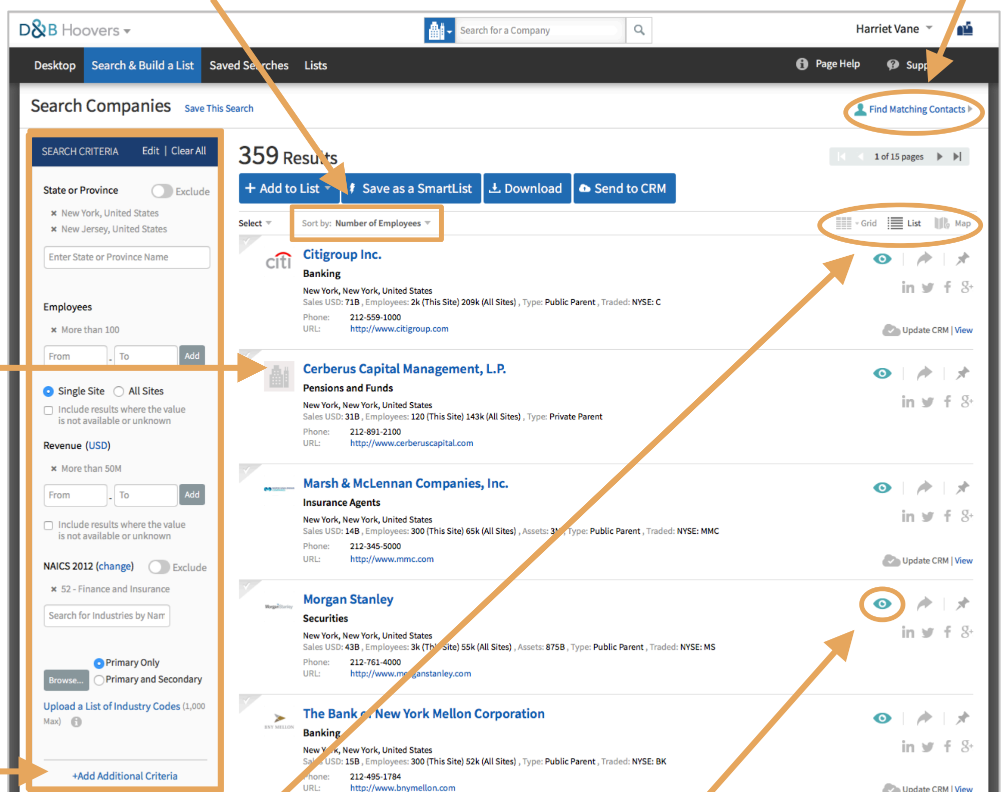
REVIEWING SEARCH RESULTS

Sort Options
By default, results are sorted by number of employees. Other sort options include assets, company name, or revenue.

Find Matching Contacts
Create a list of contacts at these companies.

Open a Company Profile
Click a company name to learn more about a company.

Edit or Add Criteria
Edit your selected criteria on this panel or click *+Add Additional Criteria* to open the full *Search & Build a List* form to add more options to your search.



Change the View
Search results display in list view by default but can be switched to a map or grid view. Map view displays the companies from the current results page on a map. *Note: This view is only available for companies and contacts searches and for certain geographies.*

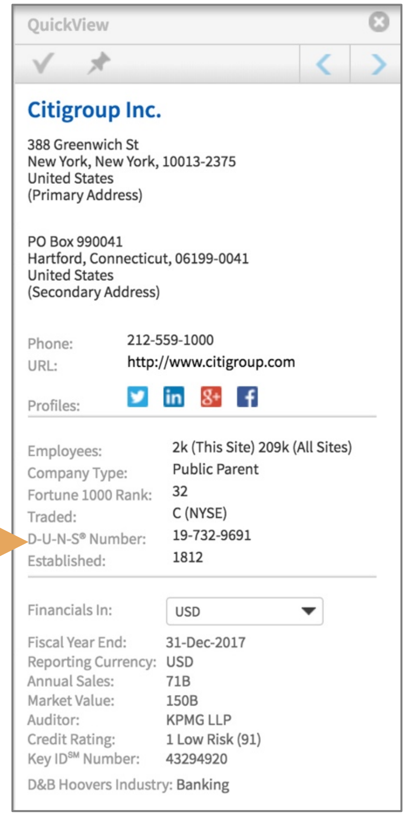
Grid view gives you the option to choose the fields you want to display. Please go to page 13 to learn more about creating a custom grid view.

QuickView
Click the eye icon to take a closer look at an item on your list. Learn more about the QuickView on the next page.

Access More Details with the QuickView

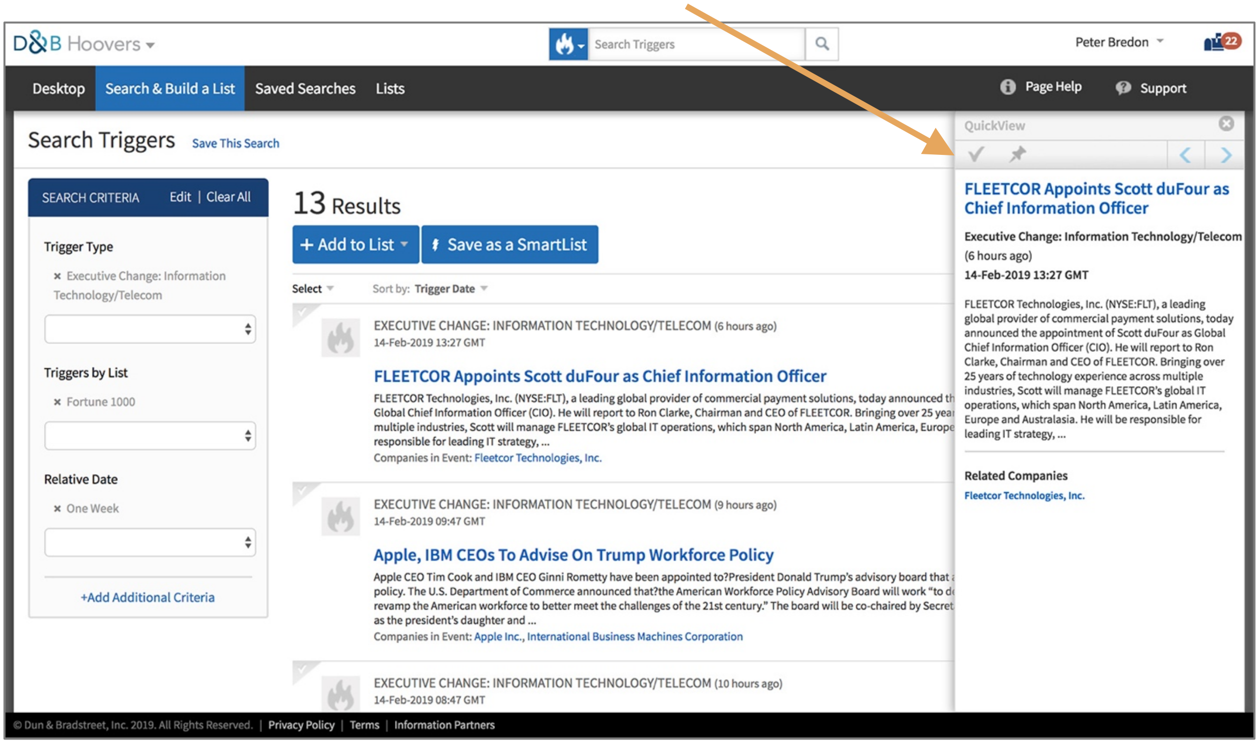
The QuickView pane provides a snapshot overview of an item within search results or a saved list. This is an easy way to learn more about a company, contact, news article, or trigger alert without leaving the search results or list.

Click the eye icon next to the item to open the QuickView.



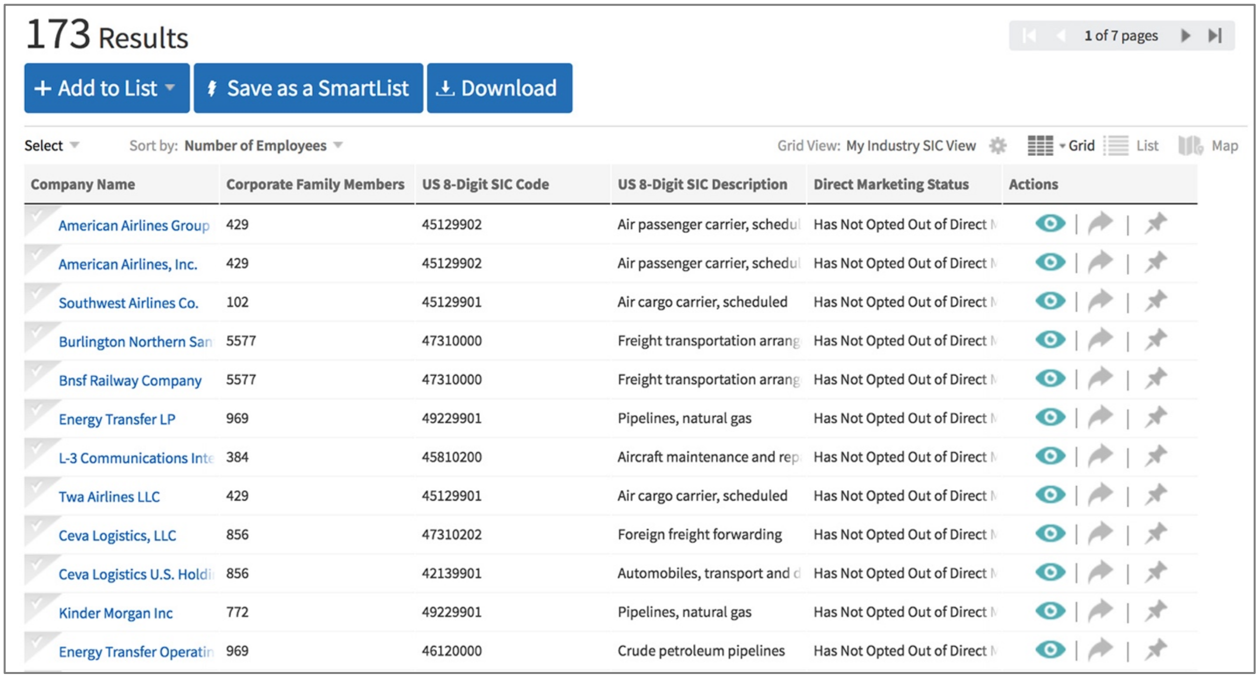
QuickView Company Pane
Open the QuickView pane to view the address, financial information and other business details.

Trigger Alerts
See more of a trigger alert by leveraging the QuickView when searching for triggers. If you want to follow up on the trigger, you can click the push pin icon to pin it to your desktop for easy access.



Customize How Data Appears with Grid View

By default, lists and search results display in a list view. If you would like to customize the data elements that are displayed, you can create a custom table with grid view. You can select the fields that will display in your view and save your table to apply to future searches or lists. There is no limit to the number of grid views you can create.

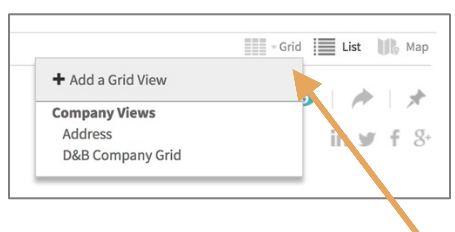


Company Name	Corporate Family Members	US 8-Digit SIC Code	US 8-Digit SIC Description	Direct Marketing Status	Actions
American Airlines Group	429	45129902	Air passenger carrier, schedul	Has Not Opted Out of Direct	
American Airlines, Inc.	429	45129902	Air passenger carrier, schedul	Has Not Opted Out of Direct	
Southwest Airlines Co.	102	45129901	Air cargo carrier, scheduled	Has Not Opted Out of Direct	
Burlington Northern San	5577	47310000	Freight transportation arrang	Has Not Opted Out of Direct	
Bnsf Railway Company	5577	47310000	Freight transportation arrang	Has Not Opted Out of Direct	
Energy Transfer LP	969	49229901	Pipelines, natural gas	Has Not Opted Out of Direct	
L-3 Communications Int	384	45810200	Aircraft maintenance and rep	Has Not Opted Out of Direct	
Twa Airlines LLC	429	45129901	Air cargo carrier, scheduled	Has Not Opted Out of Direct	
Ceva Logistics, LLC	856	47310202	Foreign freight forwarding	Has Not Opted Out of Direct	
Ceva Logistics U.S. Holdi	856	42139901	Automobiles, transport and d	Has Not Opted Out of Direct	
Kinder Morgan Inc	772	49229901	Pipelines, natural gas	Has Not Opted Out of Direct	
Energy Transfer Operatin	969	46120000	Crude petroleum pipelines	Has Not Opted Out of Direct	

Your Custom View

By applying a grid view to a list or search results, you can easily view details that are important to your decision making. Here, we are showing a grid view that brings industry information and corporate family tree details to the forefront.

How to Add a Grid View

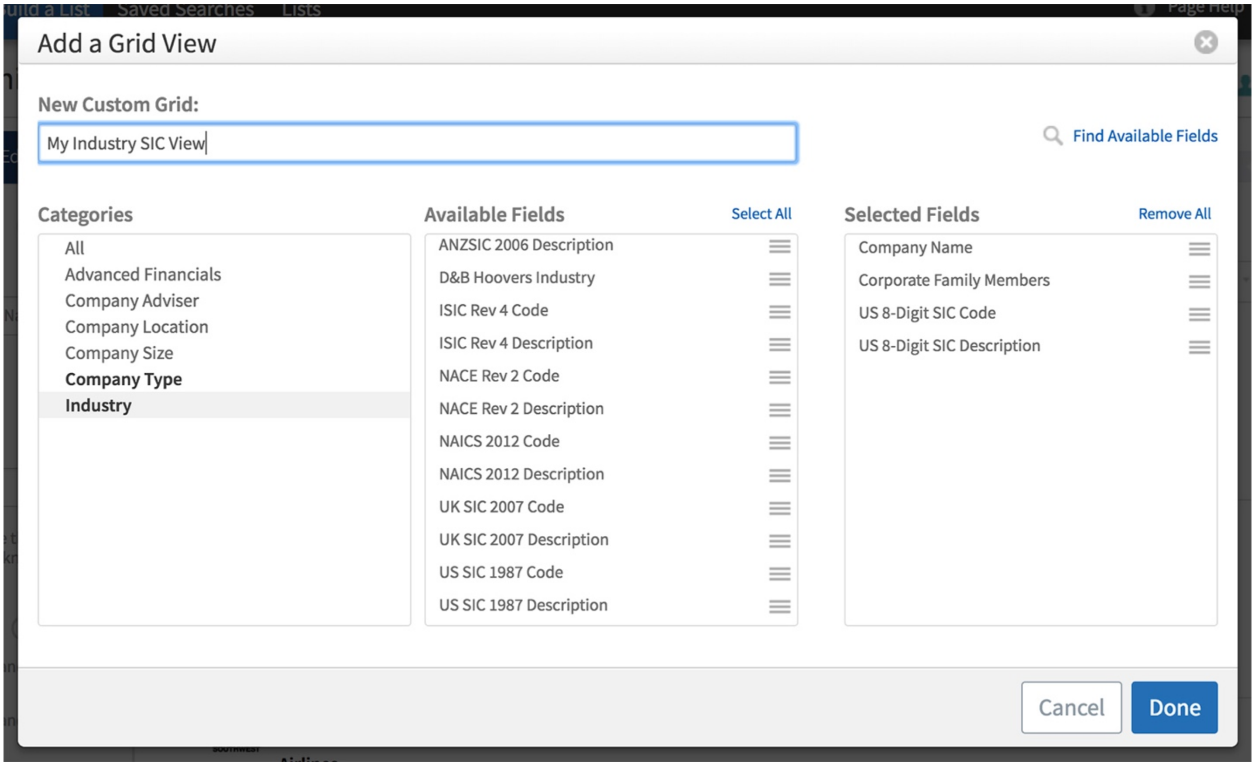


Access Grid Views

Click the *Grid View Icon* to create a new Grid View or access existing views.

1. From a company or contact list, click on the Grid View Icon and select *+Add a Grid View*.
2. Name your view by typing a name in the *New Custom Grid* field.
3. Select the desired data points for this view by clicking on a data element from the "Available Fields" column. Narrow the choices by selecting individual categories or by using the "Find Available Fields" search field.
4. Reorder the "Selected Fields" by selecting a data element and dragging it up or down to the desired location.
5. Click any selected field to remove it from the grid and place it back in "Available Fields".
6. Once the grid view is configured, select *Done* in the bottom right corner to apply the grid view to the existing list or set of results.

7. The grid will be saved in the Grid menu for future use.
8. To delete a grid view, click the x icon located next to the name of the grid view.

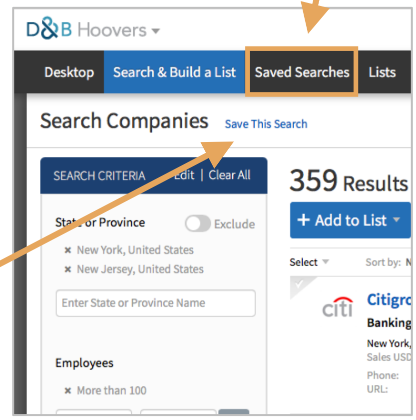


Add a Grid View
Customize your grid view by clicking on a field name to add it to your view. You can drag and drop the items in the "Selected Fields" box to re-order the fields. Don't forget to enter a name for your new view so you can easily access it in the future.

How to Save a Search

You can save your search to easily access commonly used search criteria. Click *Save This Search* on the search results screen to capture the criteria for future use. Saved Searches can be retrieved on the *Saved Searches* menu on the navigation bar. The most recently accessed or saved searches will display on the drop down menu. Click *View All* to see all saved searches.

Saved Searches Menu
Access saved searches by selecting *Saved Searches* on the navigation bar.

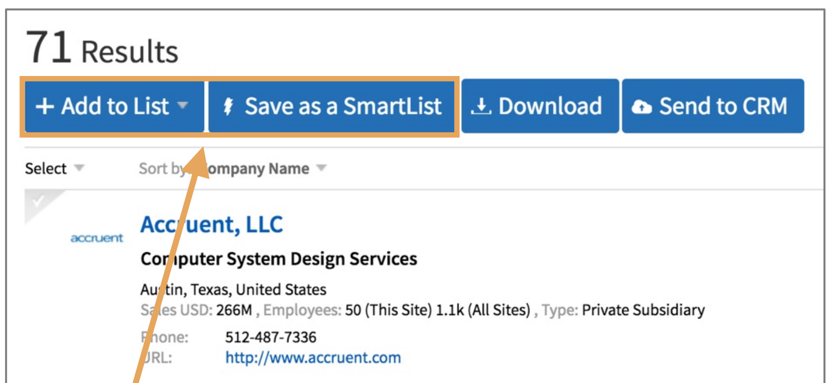


Save This Search
Click here to capture search criteria for future use.

How to Save Your Search Results as a List

D&B Hoovers provides two list options. You can save your results as a list or a dynamically updating SmartList.

When you save your results as a list, it creates a static list that will not change. The SmartList will update as new opportunities that match your search criteria become available and it will update when companies on the list no longer meet the list criteria. As a result, you will always have a current and relevant list.



Save as a List or SmartList
Click *+ Add to List* to open a sub-menu with additional options, such as adding results to an existing list or creating a new list. Click *Save as a SmartList* to save as a dynamically updating list.

Much more information on saving and exporting lists can be found in the *Working With Lists* section.

Search Tips & Tricks

Companies by List Filter

The Companies by List filter gives you the ability to search within the companies in saved lists or SmartLists. You can select multiple lists with this filter and apply additional filters via the search form to build more granular results. Companies by List can support up to 10,000 companies at a time.

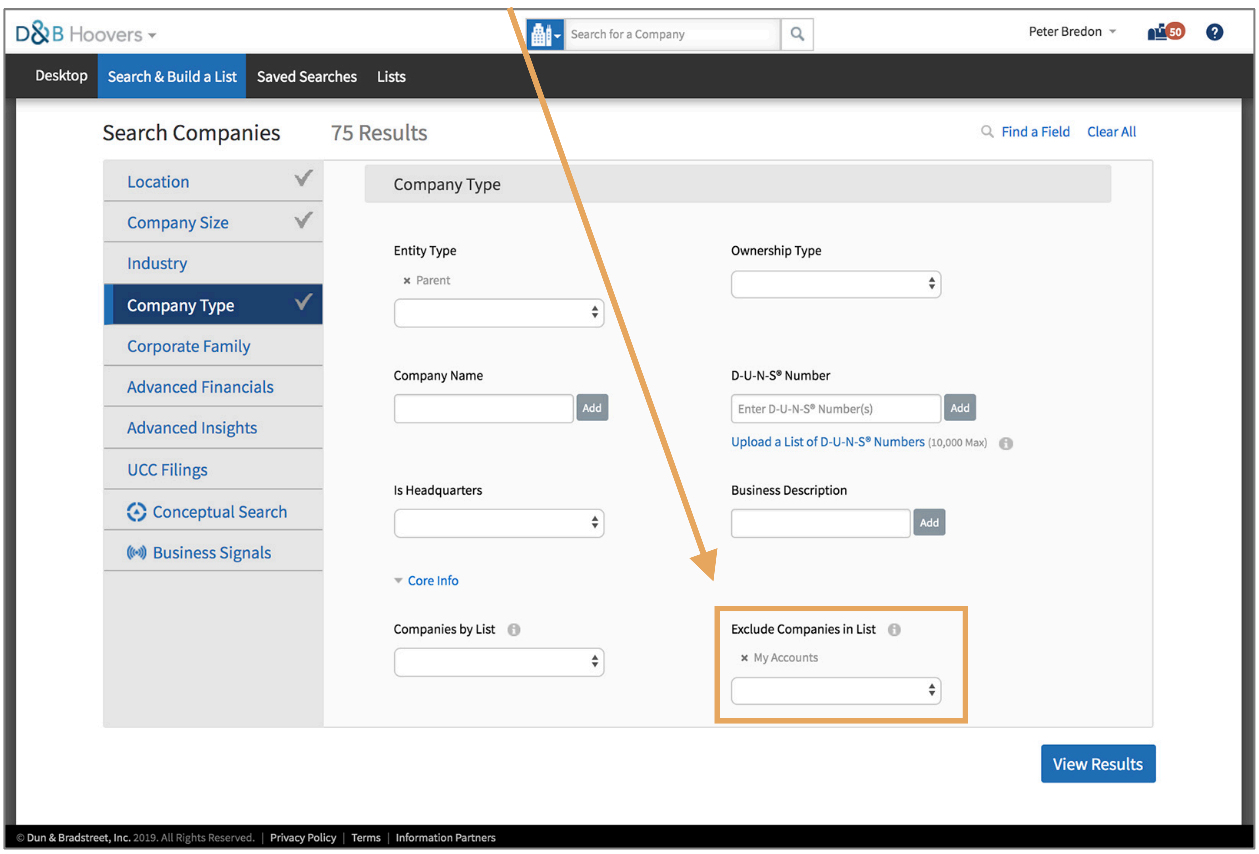
Exclude Items from Search Results with Suppression Lists

Sometimes you may want to exclude a list of companies from your search results, such as suppressing existing accounts from a new prospect list. You can easily do this by selecting a list or lists via the *Exclude Companies in List* filter in the "Company Type" section under "Core Info" on the Search and Build a List Form.

You can upload a list of your accounts via *Upload a New List* on the Lists Menu. Please refer to the *Working With Lists* section of this guide for instructions.

Exclude Companies in List

Select a saved List or SmartList to exclude the companies on your list from search results.



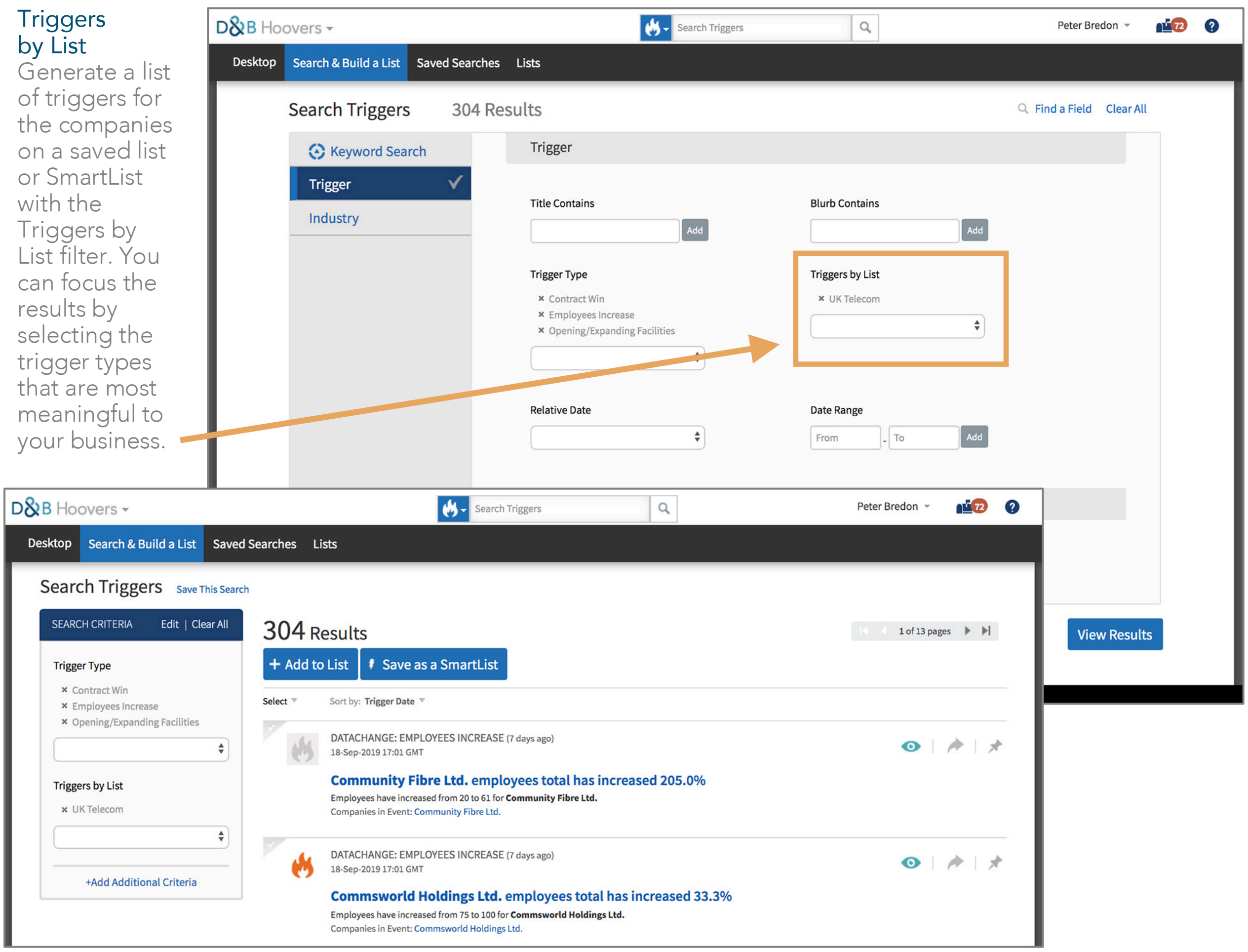
Quickly Build a List of Triggers for Items on Your List

Trigger alerts are real-time alerts of events such as merger and acquisition announcements, executive changes, and contract wins. Triggers can alert you to new opportunities and reasons to call existing accounts. You can easily build a list of triggers related to companies on a saved list or SmartList with the *Triggers by List* filter.

1. Select *Triggers* as the type of search on the Search and Build a List Menu.
2. Navigate to the Trigger section of the form.
3. Click the drop down list under *Triggers by List* and select the list you want to search by.
4. Add other filters as needed to narrow your search, such as *Trigger Type* or *Date Range*.
5. Click *View Results* and D&B Hoovers will generate a list of all triggers that are tied to the companies on the list you selected and meet any additional criteria you applied to the search.

Triggers by List

Generate a list of triggers for the companies on a saved list or SmartList with the Triggers by List filter. You can focus the results by selecting the trigger types that are most meaningful to your business.



Quick Tip:

Save your Triggers by List results as a dynamically updating SmartList to create a running feed of triggers for the companies on your list.

Postal/Zip Code Options

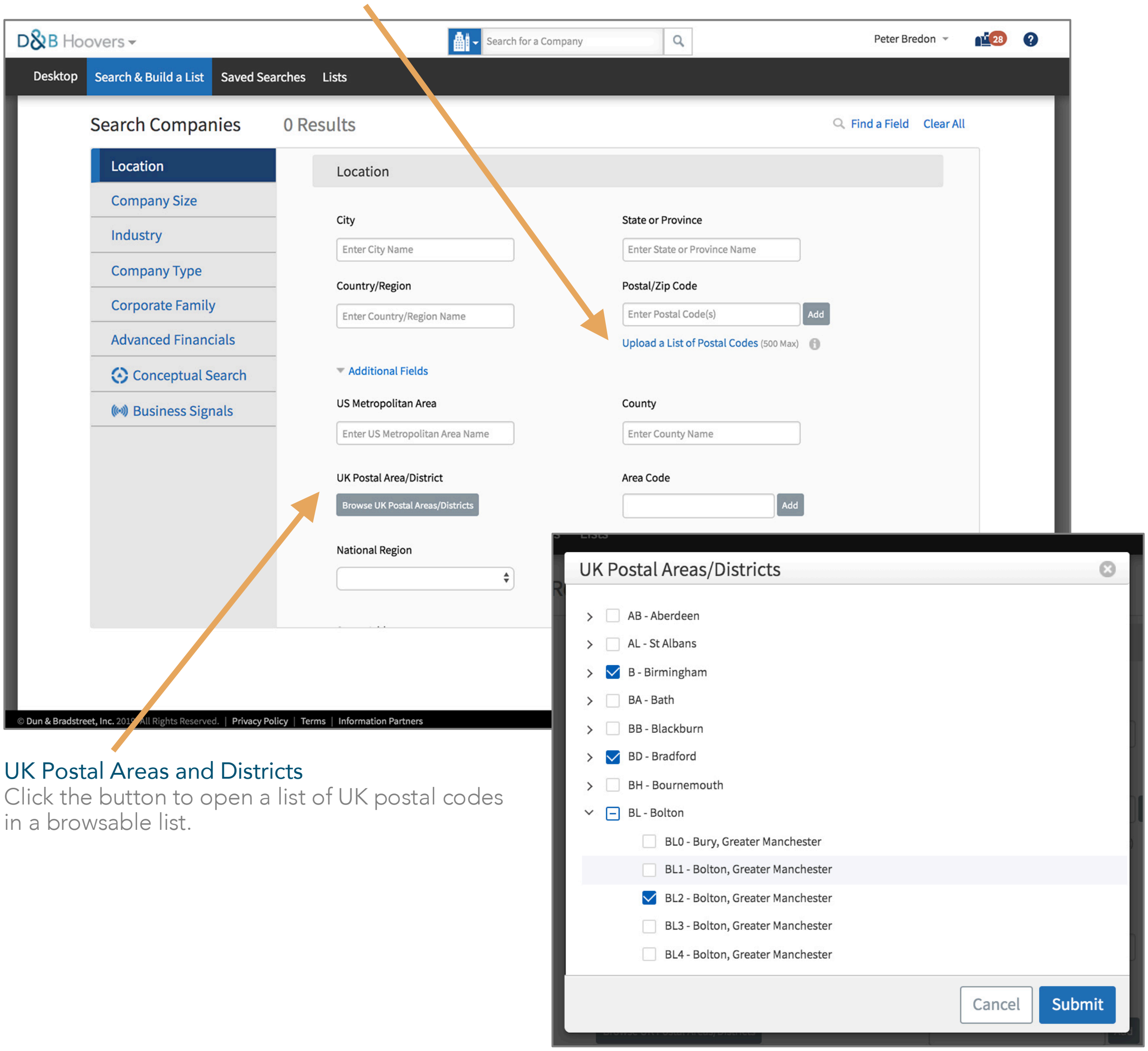
- If you are working with a range of postal or zip codes, you can upload a list of up to 500 codes to apply them to your search. The file should be a single column CSV file with no header row. Any global post code can be searched in D&B Hoovers.

- If you only need to search within a few postal codes, you can manually enter them one at a time in the *Enter Postal Code(s)* field. Click the *Add* button after typing in each code.

- A browsable list of UK Postal Areas and Districts is available under *Additional Fields* in the Location section of the Search and Build a List Form. Click the *Browse UK Postal Areas/Districts* button to open the complete list.

Upload a List of Postal Codes

You can easily upload a list of up to 500 postal codes to add them to your search criteria.



UK Postal Areas and Districts

Click the button to open a list of UK postal codes in a browsable list.

Working With Lists

SAVING LISTS, EXPORTING DATA & MORE

In this section we will cover:

- How to save search results as a list or SmartList®
- What is a SmartList?
- How to download lists and search results as an Excel or CSV format
- How to export data to a CRM or marketing automation platform
- How to upload a list of companies to D&B Hoovers
- Tips & Tricks for lists and exports
- How to access lists on the Lists Page

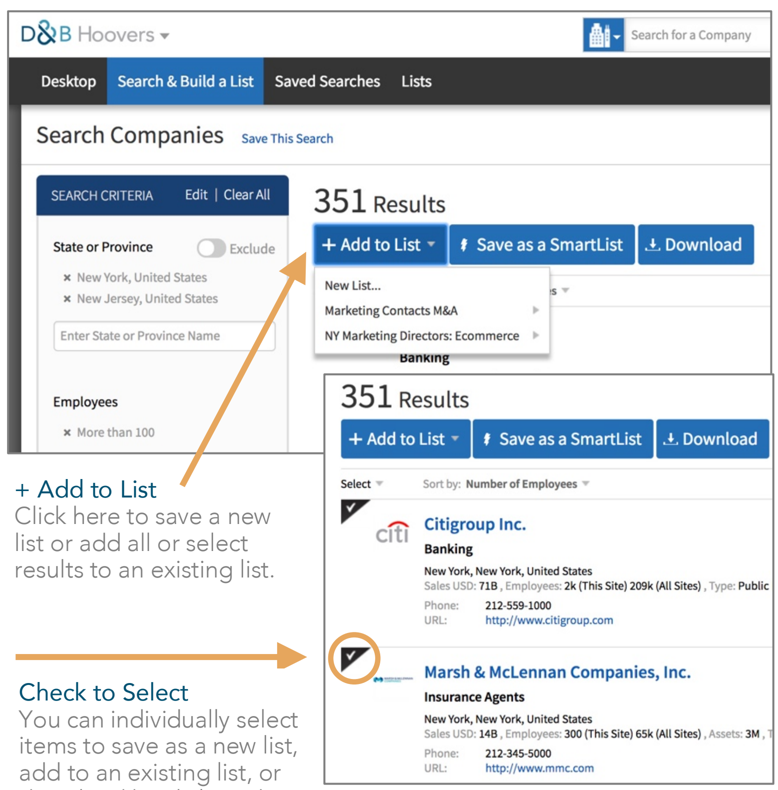
Saving Lists

D&B Hoovers Provides Two List Options

- List: When you save your search results as a list, D&B Hoovers captures the data at that moment in time and the items that are included will not change.
- SmartList: A SmartList will dynamically update as new companies or contacts within the Dun & Bradstreet Data Cloud fall within your list criteria.

How to Save a List

1. Click the +*Add to List* button on the search results screen.
2. Determine if you want to save the results as a new list or add to an existing static list.
3. Follow the prompts onscreen to name and save your list.

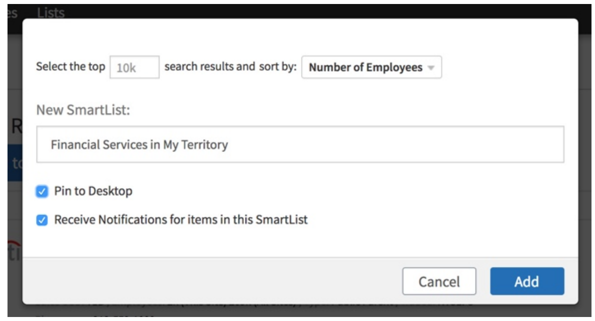


+ Add to List
Click here to save a new list or add all or select results to an existing list.

Check to Select
You can individually select items to save as a new list, add to an existing list, or download by clicking the check mark icon next to the item.

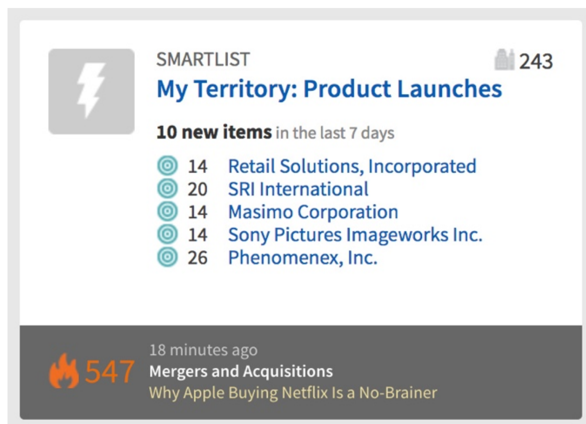
How to Save a SmartList

1. Click the *Save as SmartList* button on the search results screen.
2. When prompted, enter a name for your list.
3. Check *Pin to Desktop* if you want to access this SmartList on your D&B Hoovers Desktop.
4. Check *Receive Notifications for Items in this SmartList* to enable in-product notifications for this list. You will also receive email notifications if you have enabled email notifications on the User Preferences screen.
5. Click *Add* to complete.



What is a SmartList?

SmartLists dynamically update when D&B Hoovers finds new companies or contacts that meet your list criteria. Run your search criteria, save the results as a SmartList and D&B Hoovers will keep monitoring our global data cloud 24x7 to identify new companies or contacts that fall within your list criteria. When this happens, the new items will automatically be added to your list and items that no longer meet your criteria will be removed. With a SmartList, you will always have the most current and relevant list of opportunities.



SmartLists can help you:

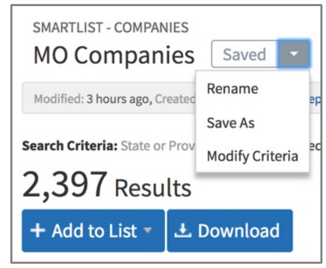
- Get in the door faster
- Monitor your territory
- Feed pipelines with actionable opportunities

SmartList Desktop Tile

Pin your SmartList to your desktop to easily monitor changes. This tile shows us that 10 new items have been added to this list within the last 7 days and the most recent additions are itemized on the tile. You can also see the most recent trigger alerts associated with this list by mousing over the grey bar at the bottom of the tile.

Tips & Tricks for Working with Lists

Rename or Clone a Saved List or SmartList



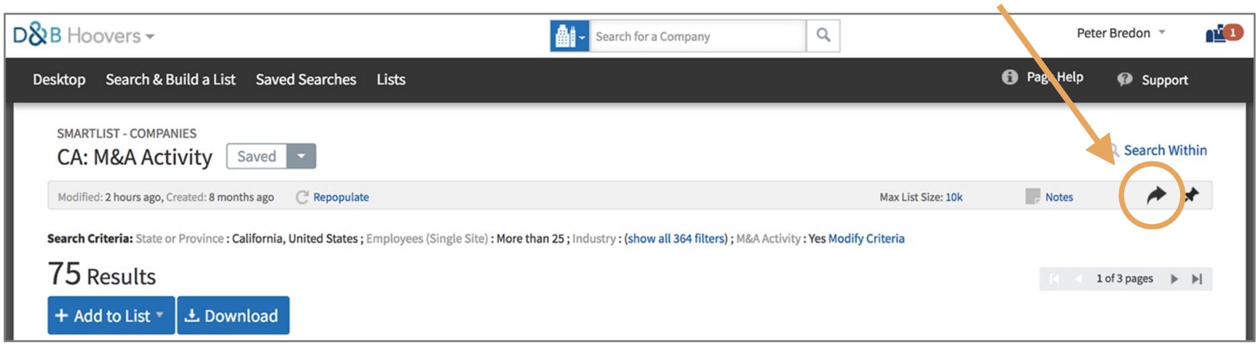
Open a list or SmartList. Click the down arrow next to the list name to open options to rename or clone your list by saving it as a new name. You can also use this menu to modify your SmartList criteria.

Share a List

Easily share a list with another D&B Hoovers user by clicking the share icon next to a list or SmartList name. As you modify your list in the future, those changes will be automatically applied to your shared list as well. The recipient of your shared list can clone that list to make their own modifications.

To learn more about sharing, see the section on *Sharing Content*.

Click to Share
Share a list with another user.

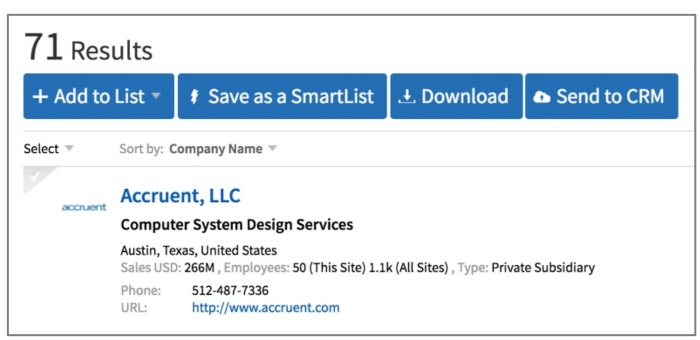


How to Download or Export Search Results and Lists

D&B Hoovers provides multiple options to export search results or lists, including:

- Download as an Excel or CSV format
- Export to CRM or marketing automation platform

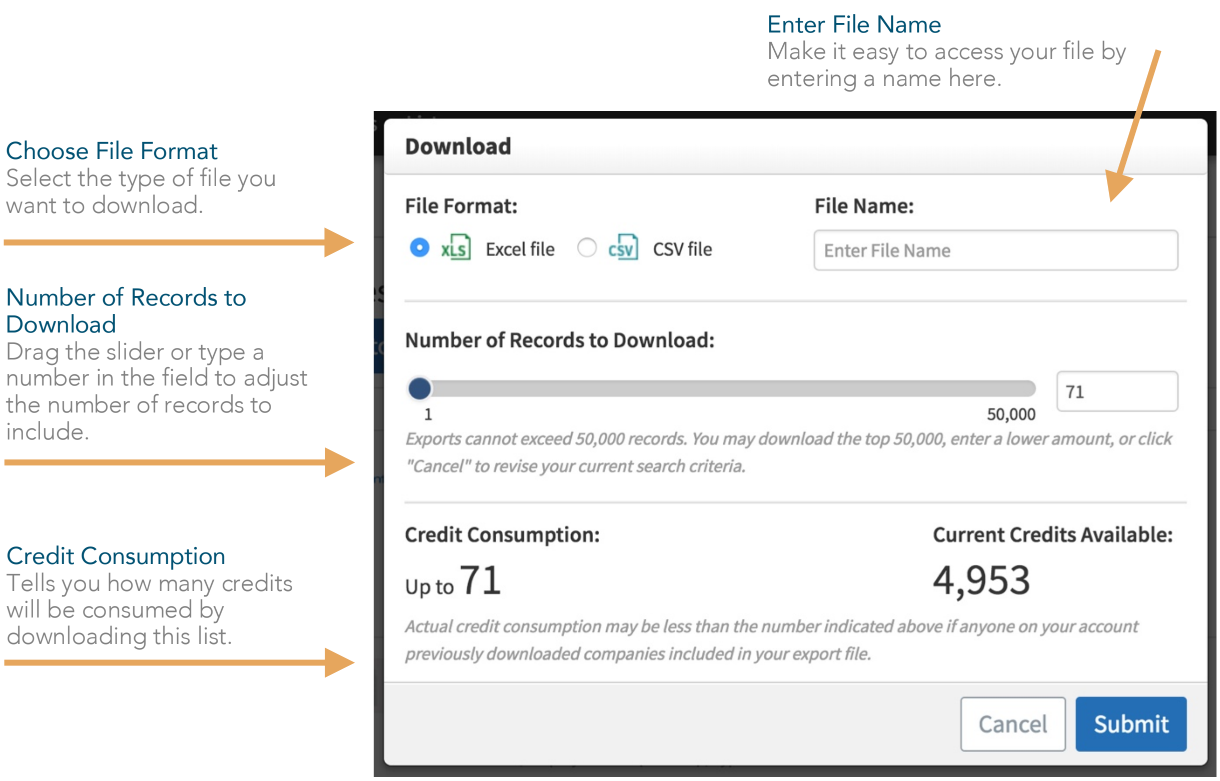
Search results, saved lists, and SmartLists, or individually selected companies/contacts can be downloaded to a CSV or Excel file format.



If your subscription includes integration with a CRM or marketing automation platform, you can also send data to these systems.

How to Download as a CSV or Excel File

1. Generate search results or open a saved list/SmartList.
2. Click the *Download* button. If you are downloading a company list, you will have the option of downloading companies only or companies plus contacts.
3. Follow the prompts on the download screen to choose the file format and name the file.
4. Determine the number of records to include in your download by entering a number in the box or dragging the slider across the grey bar. Exports cannot exceed 50,000 records at a time. As long as your list is less than 50,000 records and you have enough credits available, the number of items in your list will load in the *Number of Records to Download* box.
5. If you are only downloading companies you will click *Submit* to initiate the download.
6. If you opted to download companies plus contacts, click *Next.*
7. Designate how many contacts per company to include. You can include up to a maximum of 10 contacts per company. It will default to 3 contacts per company.
8. Select the types of contacts you want to include by checking the boxes next to the desired *Contact Levels* and *Job Functions*.
9. Check the box next to *Yes, include emails/direct dials* if you wish to include this information in your file. You can check your Business Contacts (emails and direct dials) credit balance by clicking *Check my balance*.
10. Click *Download* to complete.
11. Your downloaded file can be accessed from the downloads folder on your computer.

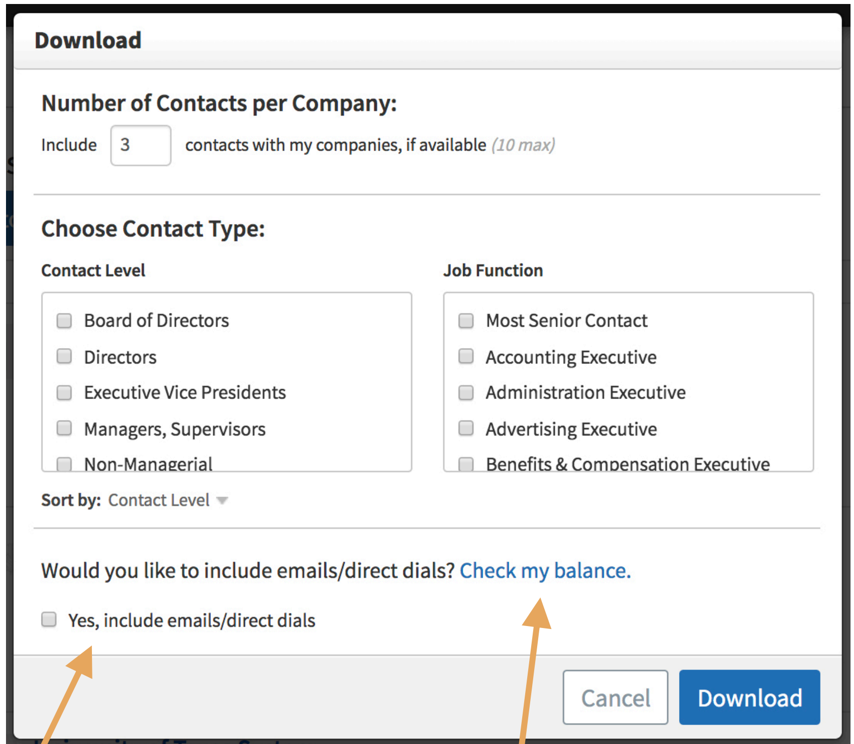


Companies Plus Contacts Options

Choose Number of Contacts
Enter the number of contacts to include per company.

Contact Type
Select the Contact Levels and Job Functions you want to include.

Sort Options
Click to change the sort order. Sort by Contact Level, Direct Phone Available, Contact Name, or Email Available. Sort order will set the priority for which contacts to include.



Include Emails/Direct Dials
Click here to include emails and/or direct dials when available.

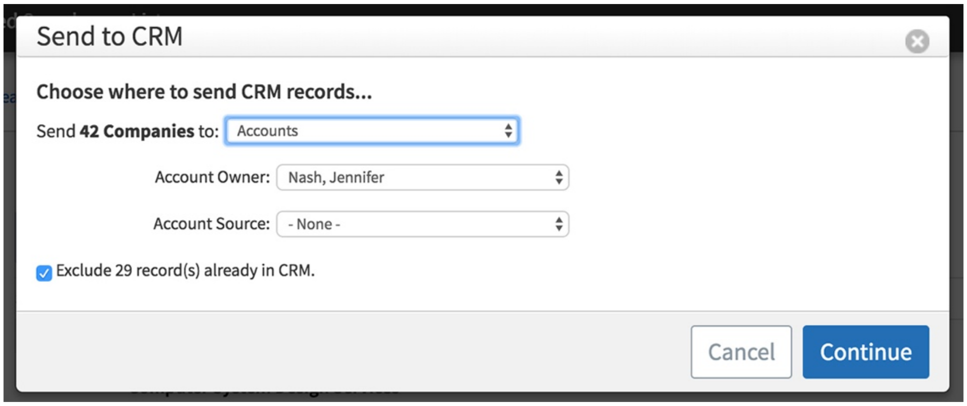
Check My Balance
Click to view how many credits are available for the download of emails and/or direct dials.

How to Export Records to the CRM or MAP

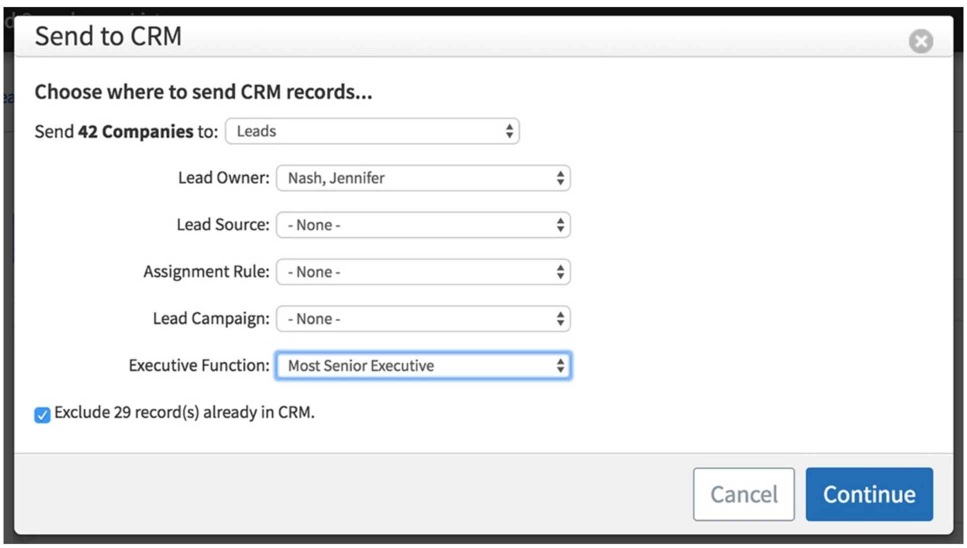
If your subscription includes access to D&B Hoovers in your CRM or a Marketing Automation Platform connector (MAP), you can easily send companies and contacts from D&B Hoovers to your CRM or MAP from search results, saved lists and SmartLists, or Company and Contact Profiles.

1. Generate search results or open a saved list/SmartList.
2. Click the *Send to CRM* button or *Send to MAP* button as appropriate.
3. A dialogue box will open. First, choose if you want to send these records as accounts or leads. If you choose leads, you can opt to include a contact with a company record by choosing an Executive Function from the provided drop down list. For both accounts and leads, you will be asked to designate the Account or Lead Owner.
4. To avoid duplication, D&B Hoovers will exclude records that are already in the CRM. The checkbox at the bottom of the dialogue box tells you how many records will be excluded from your send. Uncheck this box if you want to include the duplicate records.
5. Click *Continue* to proceed with the send.

Sending Accounts to the CRM



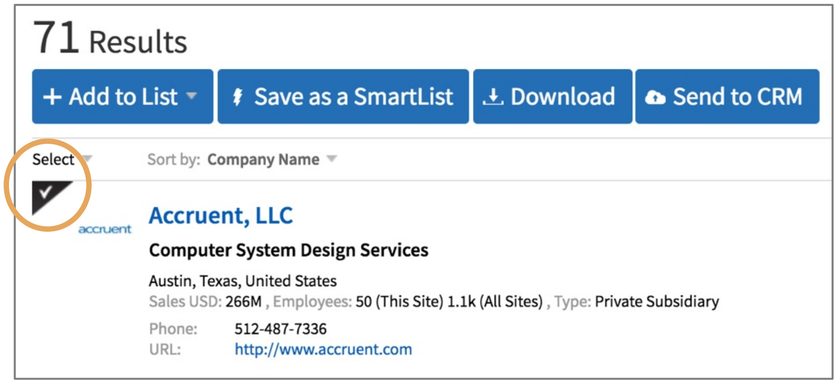
Sending Leads to the CRM

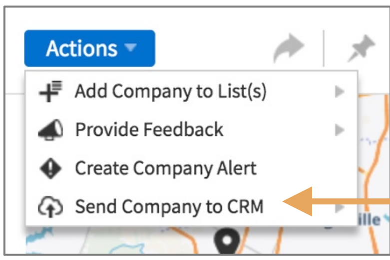


Tips & Tricks for Exporting

Select Individual Records

If you only want to select a few records for export, you can click the check mark symbol next to an item to select it.





Send to CRM from Company Profile

Leverage the blue Actions button at the top of a Company Profile to send a company to your CRM.

How to Upload a List

You can upload your own list of companies to access D&B Hoovers data for those organizations. This is a great way to work with your assigned accounts in D&B Hoovers. Simply upload a CSV file and we will create a new list of matched companies from D&B Hoovers.

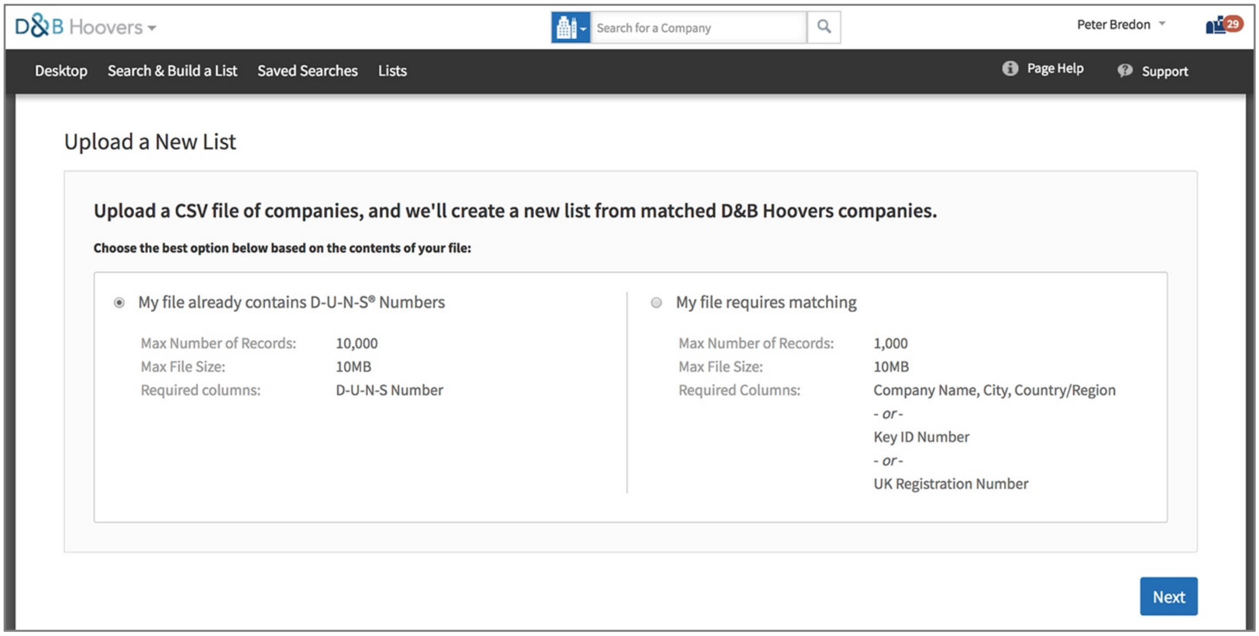
File Requirements

You can choose between two options for the file upload.

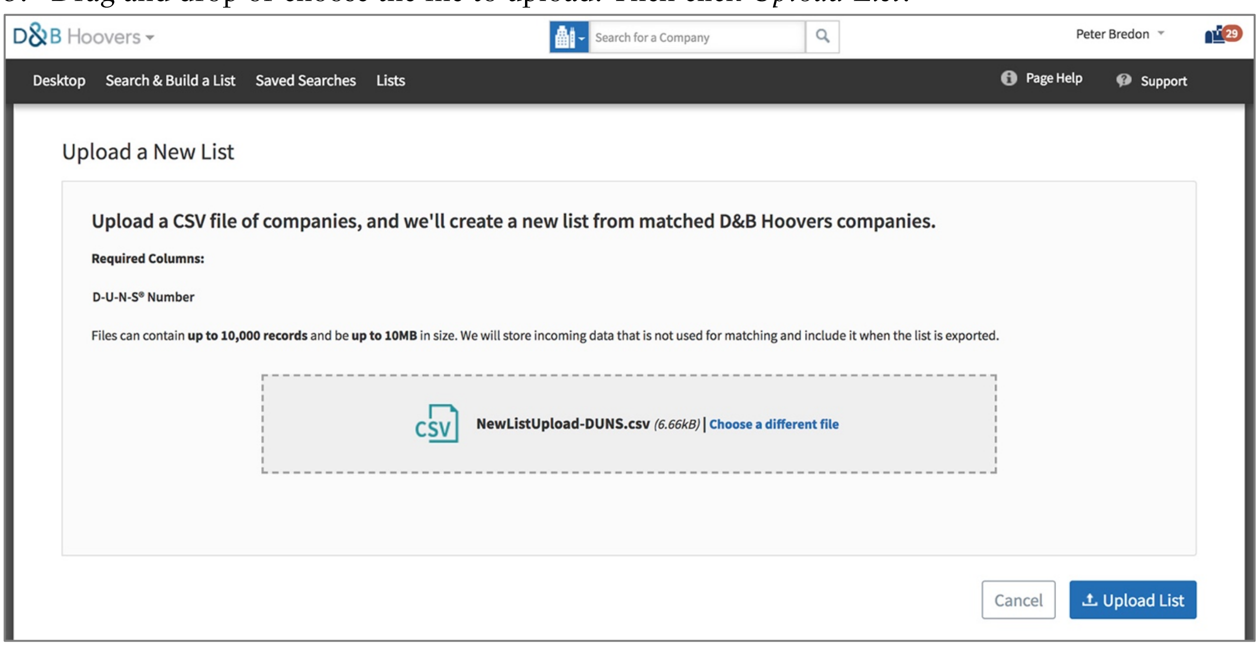
- Option A: The file must include the D&B D-U-N-S® Number for each company. With this option you can upload up to 10,000 records at a time. The maximum allowed file size it 10MB.
- Option B: The file must include the following information: 1) Company Name, City, and Country; or 2) KeyID; or 3) UK Registration Number. The file can contain up to 1,000 records with a maximum file size of 10 MB.
- Column headers are not required in the CSV file, as the upload wizard allows users to select the column name during the import process.
- If your list exceeds the size limits, break it up into separate lists and then combine the lists after upload with the +*Add to List* button.

Upload Your List

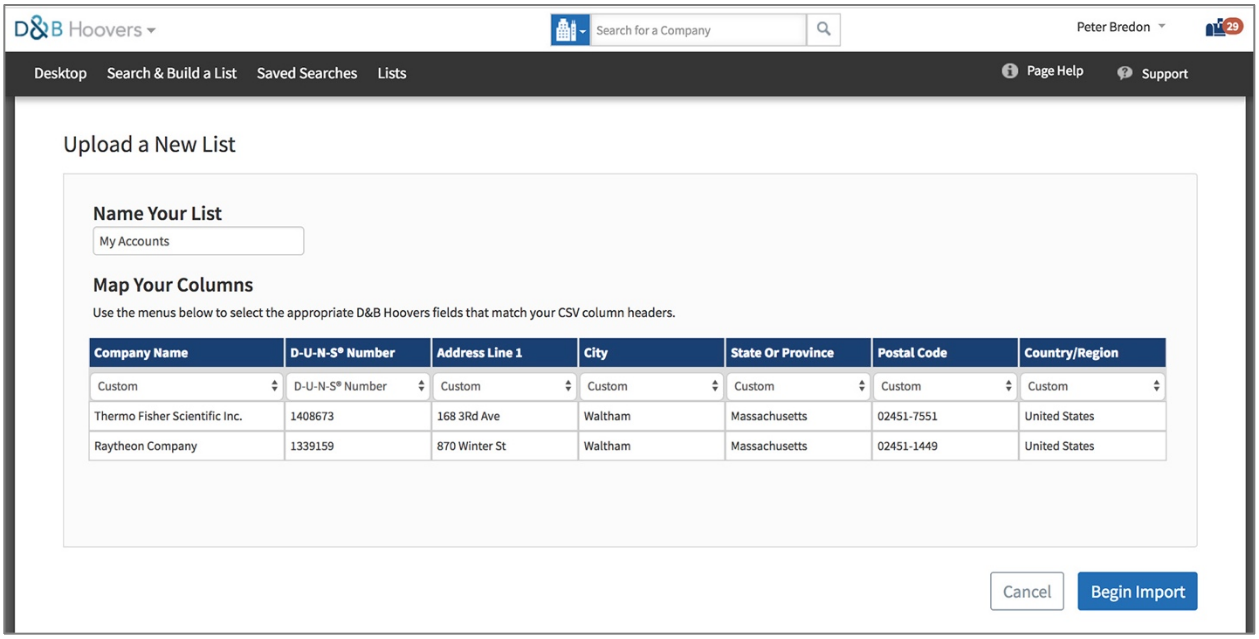
1. Select *Upload a New List* from the Lists Menu.
2. Select the type of list you will upload and click *Next*.



3. Drag and drop or choose the file to upload. Then click *Upload List*.

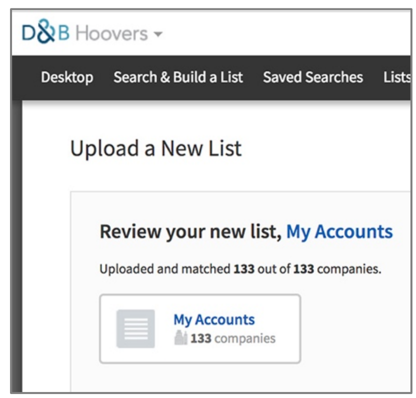


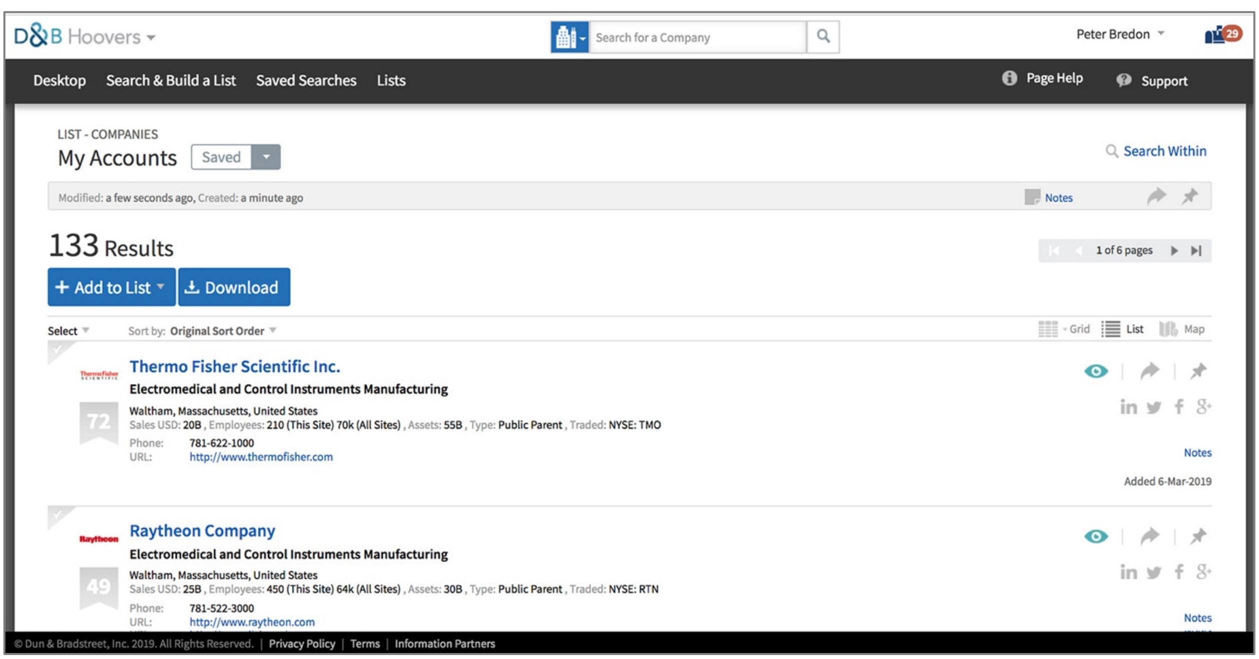
4. Enter a name for your list in the "Name Your List" field. Then map your columns using the sample rows of data from the file as a guide. Click *Begin Import* to continue.



5. Review the results. Once the file finishes processing, the number of matched companies is displayed, along with those companies that did not match to the D&B Hoovers company database. Click on the list name within the results modal to navigate to the list.

6. View your list and begin interacting with these companies in D&B Hoovers.

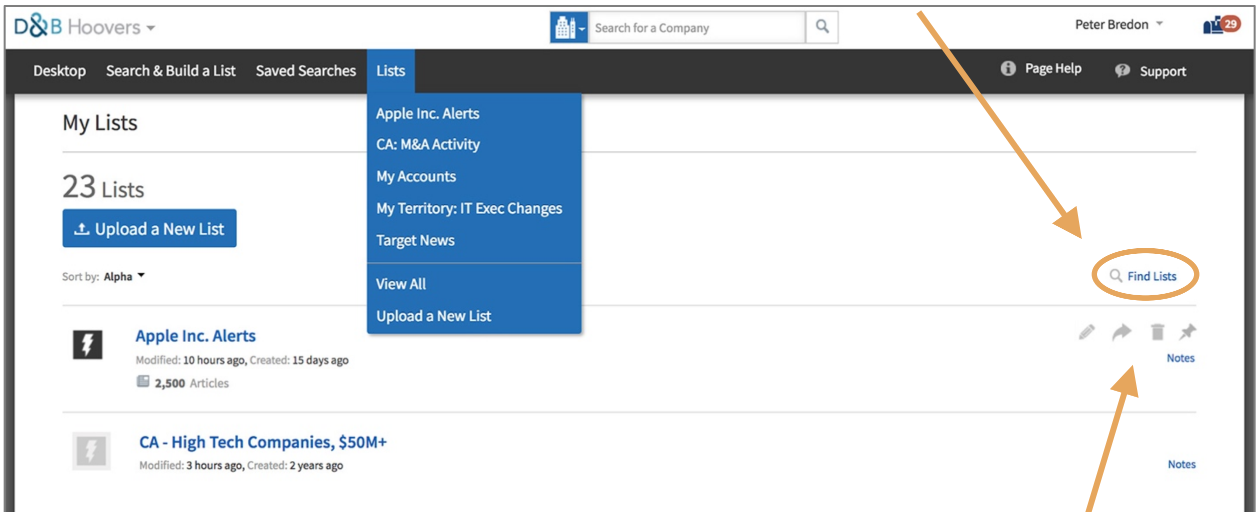




Lists Page

Access all saved lists and SmartLists by clicking *Lists* on the navigation bar. The five most recently accessed lists will display on the drop down menu. Click *View All* to open the Lists Page.

Find Lists
Enter keywords from a list name to quickly locate a list.



Working With Lists
When you mouse over a list name, a series of icons appear on the right side of the screen. Options include renaming, sharing, deleting, or pinning to your desktop.

You can also click *Notes* to add notes about your list.

Company Profiles

ACCESS DEEP-DIVE BUSINESS INTELLIGENCE

Our Company Profiles provide in-depth company information that can help you identify decision makers, gain insight into company activities, and obtain competitive intelligence. This information will help you better understand the challenges and opportunities at an account, so you can personalize your pitch and have better meetings.

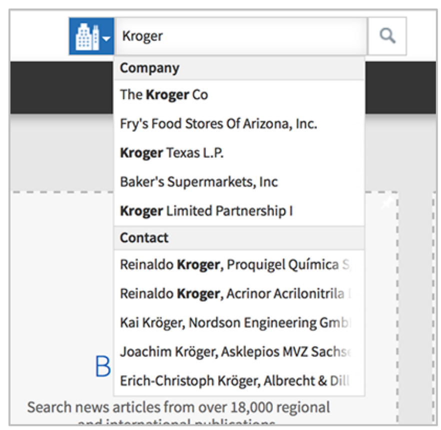
In this section we will cover:

- How to access a Company Profile
- Overview of the key components of the profile
- Reports that are available on a profile

How to Access a Company Profile

You can quickly access a Company Profile by entering a company name in the Global Search Bar in the top center of the screen. As you enter the name, a type-ahead drop down will appear with a list of companies that match your search name. Click the appropriate selection to go directly to that profile or click the magnifying glass icon to generate a list of companies that match your search term and select the appropriate entry from the list.

Company Profiles can also be accessed by clicking a company name on lists, search results, or desktop tiles.



Access Content via the Global Search Bar
Enter a company name on the Global Search Bar to quickly open a Company Profile.

A CLOSER LOOK AT A COMPANY PROFILE

Engage With Relevance and Have More Meaningful Conversations

Each D&B Hoovers Company Profile delivers robust business intelligence, including contacts, trigger alerts, financials, competitors, and industry information. Report options vary by subscription. Click a report name on the left side of the screen to access the content.

Pin to Desktop

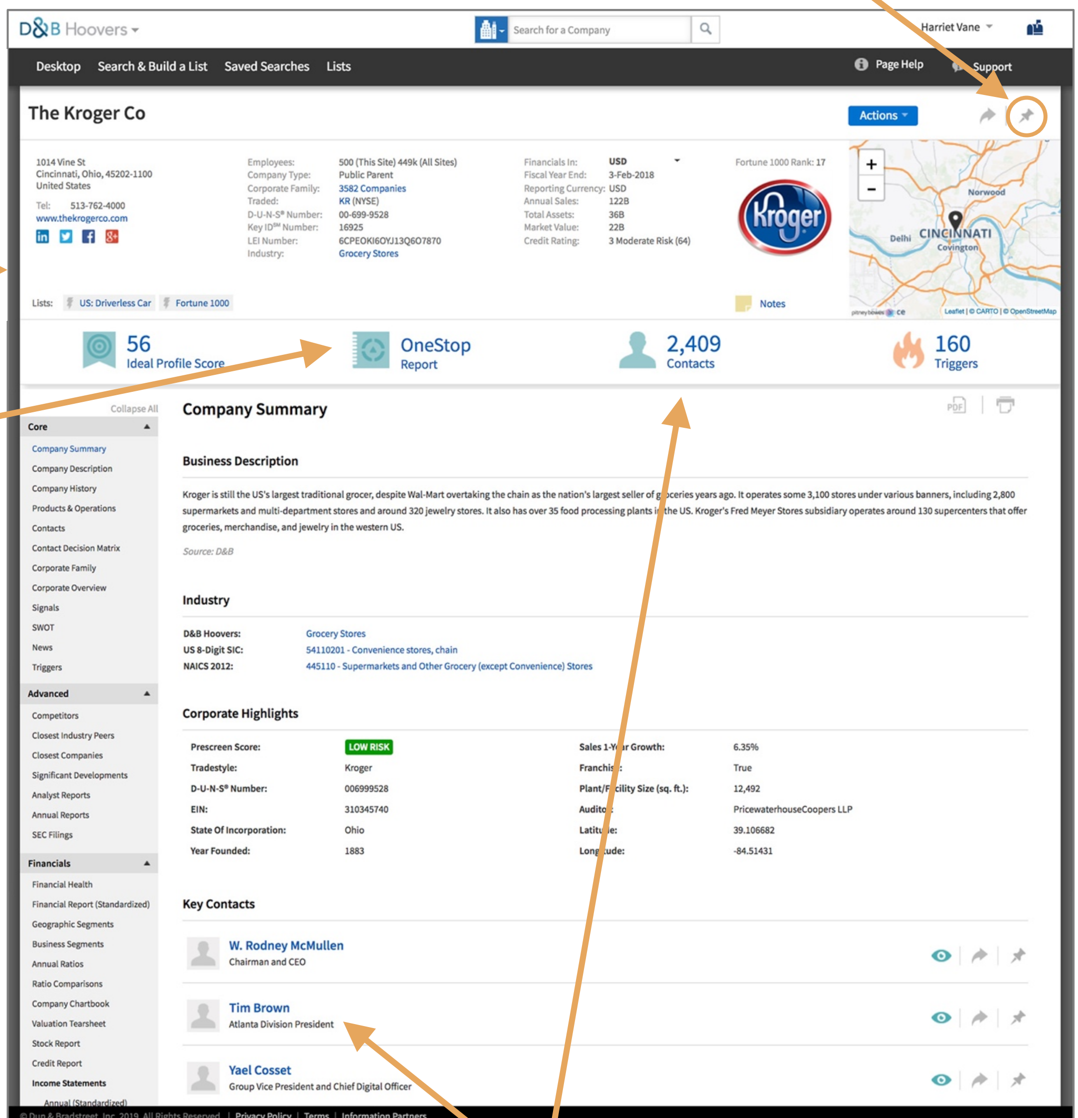
Click the push pin icon to pin this company to your desktop for easy event monitoring.

Company Details

Key company data points can be found at the top of the screen.

OneStop Report

Package any of the reports on a Company Profile into a portable and shareable PDF. OneStop Reports are perfect for pre-meeting prep.

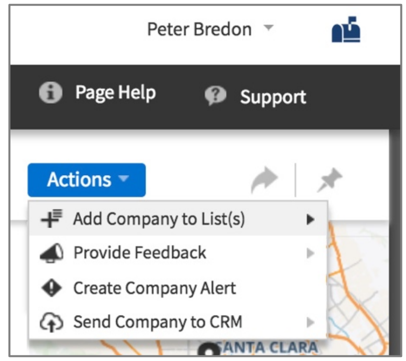


Identify Decision Makers

Key company contacts display on the Company Summary. Access all available contacts for this company by clicking *Contacts* in the center section of the screen.

Actions Button

The blue Actions Button at the top right of the Company Profile provides additional options for working with this company in D&B Hoovers.



Click the button to:

- Add Company to List(s)
- Provide Feedback
- Create Company Alert
- Send to CRM (for clients who access D&B Hoovers in their CRM)

The *Provide Feedback* option connects you to the online ticketing system for the Support Team. Here you can leave feedback if you find an error.

Create Company Alert creates your own news feed for this company. Initially you can access this feed on the Lists menu and then you can pin it to your desktop for easy access and monitoring going forward.

A CLOSER LOOK AT THE COMPANY PROFILE RIBBON

Lists This Company Appears In
The name of any saved list or SmartList that includes this company will display here. Click the list name to open it.

Add Notes
Click here to add notes.

Ideal Profile Score
If your subscription includes Ideal Profile, the Ideal Profile Score appears here to tell you how closely this company aligns with your customized Ideal Profile. Scores range from 0-100, the higher the score the better the match. You can click the score to open the Ideal Profile Configurator and adjust your profile criteria.

OneStop Report
The OneStop Report gives you the ability to package reports from the Company Profile into a shareable PDF file. Click *OneStop Report* to get started.

Contacts
This number tells you how many contacts are available for this company in D&B Hoovers. Click to view the contacts.

Triggers
Displays the current count of trigger alerts for this company. Click to view a list of all available triggers.

Company Profile Reports

A Company Profile can include more than 40 reports, depending on your subscription type and the size of the company you are researching. In the following pages you will find a brief description of all available reports.

Core Reports

Company Summary

The D&B Hoovers Company Summary provides an overview of key company information to help you learn more about this organization. Here you will find a business description, up to three industry classifications, corporate highlights, key contacts, recent news articles, a financial summary, and a stock snapshot. Please see page 35 learn more about the Company Summary.

Company Description

Provides a quick summary of key areas within a company, such as operations, sales and marketing, and company strategies. Written by a Dun & Bradstreet editorial team, the Company Description distills vast quantities of information into easily understandable summaries that give you insight into what is happening at the company.

Company History

Learn about an organization's past with the Company History report. This content is useful for learning about an organization's founding, as well as more recent mergers and acquisitions, partnerships, and leadership teams.

Products & Operations

This report can include sales figures by region and product line, as well as names of key products or services. This information can help you identify business units or groups to target within an organization, as well as identify areas that are growing or need assistance.

Contacts

Access all of the contacts available for this company. You can filter this list to target specific titles, functions, etc. Leverage the contact report to identify decision makers to target at this account. You can then save contacts to a list or SmartList, download to a CSV or Excel file, or send to CRM if enabled for your subscription.

Contact Decision Matrix

A new spin on an org chart, the Contact Decision Matrix groups contacts by level and functional group to help you quickly understand the organizational structure of a company and identify decision makers within departments.

Directors (UK Companies Only)

The Directors report provides details on the appointed directors for the company.

Shareholders (UK Companies Only)

Summarizes individual and corporate shareholders.

Corporate Family

The Corporate Family Report provides a comprehensive look at the corporate hierarchy and organizational structure for this company. The report includes expand and collapse sections to make it easier to navigate large organizations, allows users to hide branches, and is fully-filterable so you can target opportunities within a corporate hierarchy. Please see page 37 to take a closer at the Corporate Family Report.

Corporate Overview

The Corporate Overview Report provides information on a variety of topics, including an extensive list of industry codes, business descriptions, financial data, and stock market data. It also includes key corporate relationships, such as the company's auditor and bank names.

Signals

The Signals Report provides a list of the Business Signals® that are relevant for that company. Each Business Signal includes a score from 0-100 to help you understand how prevalent the behavior has been over the last 90 days. This report provides a unique perspective on what is happening at that company and can help you better understand the issues that may be top of mind with decision makers. Please refer to the Business Signals and Ideal Profile section to learn more.

SWOT (Strengths, Weaknesses, Opportunities, Threats)

Created by an in-house editorial team, each SWOT report is specific to the company and provides a look at business activities and industry trends that are shaping this business. Our SWOT Reports provide valuable, yet easy to digest insights that are tailored for your customer. Leverage this information to familiarize yourself with topics that could help you position yourself as a trusted advisor.

News

The News report provides access to a six-month archive of news articles to help you understand what has been happening at this company and identify potential opportunities. You may search within this report, as well as apply filters to narrow results. Options are included to save this content to a list or SmartList. Save as a dynamically updating SmartList to create your own news feed for this company.

Triggers

Provides a one-year archive of trigger alerts for this company. Triggers are real-time alerts that can indicate a reason to call. View recent triggers on this report to identify timely opportunities or go deeper to get a better understanding of the events that have been shaping this company over the last year. This report is filterable by trigger type and date range to help you focus on specific event types and/or time periods.

Advanced Reports

Competitors

This report provides a list of the company's competitors and includes ownership type, entity type, location, size, and industry information. Click on a competitor name to open the Company Profile. This information is useful when researching a company and can also help you identify new opportunities that are similar to a company that you already have a successful relationship with.

Closest Industry Peers

Provides a list of similar companies within a 100 mile radius of the company. Refine this list by applying filters. It can also be saved as a list or SmartList or exported. This is useful for identifying potential opportunities or competitors when location is a critical factor.

Closest Companies

Provides a list of all companies within a 100 mile radius of the company. Leverage search filters to refine this list, save it, or export it. You may also change the search radius by modifying the *Distance from filter* at the bottom of the location filter options. This information can be useful when planning sales trips. Identify similar companies for potential meetings when you are in the area.

Analyst Reports

Our analyst reports are written by leading brokerage firms like JP Morgan and Oppenheimer. These reports provide deep analysis on the company, providing guidance based on fact rather than interpretation. This section provides a list of all available analyst reports for this company. Options are provided to filter the list and save this information as a list or SmartList. You may also pin analyst report to your desktop for easy access.

Annual Reports

Provides a 10-year archive of annual reports for this company in PDF format. This data is valuable for historical research and to understand how the organization has evolved over time.

SEC Filings

Provides an archive of 8-K, 10-Q, 10-K, 14-A and 20-F filings submitted in the last 12 months. Filings are listed by form type, title, and date received. The content may be filtered by date range and form type. Filings may be downloaded as a PDF, MS Word, or Excel file.

Companies House Documents (UK Companies Only)

Companies House is the official registrar of companies in the United Kingdom. Our Companies House report provides one-click access to the Companies House filings for your selected company, as well as the registered number and trading address.

Technologies in Use

Gain intelligence on the technology vendors and products a company is using with the Technologies in Use Report. Have more informed conversations by understanding the technologies a company relies on to run their business and identify upsell and competitive displacement opportunities.

UCC Filings

The UCC Filings data in D&B Hoovers provides insight into the business activities of this company and is valuable when researching prospects, customers, and competitors. UCC Filings data can help you identify established buyers and detect purchasing trends that can shape future sales strategies. This report includes columns for filing date, number type, secured party, collateral, asset type, and expiration date and results may be filtered by these options. You may also search for companies by UCC Filing information on the Search and Build a List Form.

Industry Information Reports

The reports in the Industry Information section are sourced from First Research Reports, which are created, updated, and maintained by a dedicated in-house editorial team. These reports are written from a business perspective that helps sales professionals easily understand their target markets without time-consuming or expensive research. The information presented here can help you prepare for sales calls, create plans and presentations, understand market size and the competitive landscape, and build forecasts and establish benchmarks.

You may export any of these reports as a PDF and it will bundle all reports from this section into one PDF file.

Industry Overview

The Industry Overview packages key highlights from the nine reports that comprise a First Research Industry Profile. Here you will find fast facts, an industry growth rating, industry indicators, and talking points.

Industry Description

This report includes a description of the industry, as well as a look at the competitive landscape, products and operations, sales and marketing, finance and regulation, regional and international issues, and human resources.

Quarterly Industry Updates

Provides a quarterly update on events that are impacting the industry.

Executive Insight

Looks at issues and opportunities that may be top of mind for the C-Suite. This report also provides talking points that can be used as conversation starters.

Challenges, Trends & Opportunities

This section provides an overview of key business challenges, trends, and opportunities within this industry.

Call Prep Questions

This report provides questions and talking points for specific areas within an organization, such as operations, marketing, finance and technology. This information not only provides conversations starters, it offers insight into topics that could be top of mind for your customer. Use this information to identify topics you can discuss during a call or meeting.

Financial Information

Access company benchmark trends and information, as well as economic statistics and valuation multiples.

Industry Websites & Acronyms

This report provides links to useful industry websites and a glossary of industry acronyms to help you decipher industry lingo.

Industry Codes

Provides associated industry codes for this industry.

Premium Reports

CRUSH

Created by an in-house editorial team, the CRUSH Report provides deep-dive intelligence on companies in the Fortune 1000 and Global 500. Each report includes organizational charts, IT architectures, corporate strategies, capital expenditures and budgets, and key decision maker contact information. A CRUSH Report can help you find new leads, identify upsell opportunities, uncover key initiatives and industry trends, uncover competitors, and create strategic account plans.

Quick Tip:
Quickly build a list of companies with a CRUSH Report by selecting the *CRUSH Spotlight Company* filter in the Company Type section of the Search and Build a List Form. Each CRUSH Report is delivered as a PDF for easy downloading and sharing.

Financial Reports

Financial Health

Qualitative report listing key indicators, margins, ratios, and stock price data for public companies.

Financial Report (Standardized)

Provides reports for Annual Income, Interim Income, Annual Balance, Interim Balance, Annual Cash Flow, and Interim Cash Flow. Each report defaults to five periods with options to view 10 and 16. Currency type will default to the currency set under Local Preferences on the User Preferences screen. You may change the currency type by clicking the currency type next to *Financials In* at the top right corner of the report.

Financial Report (Local Filed)

Provides five years of reporting for the annual balance sheet, annual profit and loss, annual cash flows, and annual ratios.

Geographic Segments

Provides a breakdown of information by geographic segment that can be used for comparative analysis. Content varies by company and can include revenue, total assets, income before tax, operating income, and capital expenditures.

Business Segments

Provides a breakdown of total assets, revenue, and operating income by key business segments.

Annual Ratios

Provides a selection of ratios for a period of five years that can be used to track company performance and compare how this company is performing in relation to industry performance or competitors.

Ratios Comparisons

This report provides comparisons between the company and a designated industry and sector. Use this information to understand how this company's performance compares with the market.

Company Chartbook

Provides the company chartbook in Excel format. Clicking the link will download the file. Includes analysis of stock returns, company strength, and stability.

Valuation Tearsheet

This report can help you understand the financial profile and current valuation of a public company. Clicking the link will download the data in an Excel format.

Stock Report

The stock report provides insight into the performance of public companies. Gain a quick understanding of stock prices over the previous two year period with the Stock Snapshot or take a deeper dive with the Stock History.

Mortgages and Charges (UK Companies Only)

Includes a summary of mortgage activity, history, and details, including date created, description, status, and lender.

County Court Judgments (UK Companies Only)

Includes a summary of judgments, the timeframe of judgments issued within the previous 72 months, and judgment details.

Income Statements

- Annual (Standardized): Includes 3 years of data. Advanced subscription options include the ability to filter view by 3, 5, or 10 years of data.
- Interim (Standardized): Report may be filtered to view by 5, 10, or 16 quarters.

Balance Sheets

- Annual (Standardized): Includes 3 years of data. Advanced subscription options include the ability to filter view by 3, 5, or 10 years of data.
- Interim (Standardized): Report may be filtered to view by 5, 10, or 16 quarters.

Cash Flows

- Annual (Standardized): Includes 3 years of data. Advanced subscription options include the ability to filter view by 3, 5, or 10 years of data.
- Interim (Standardized): Report may be filtered to view by 5, 10, or 16 quarters.

Company Summary Report

AN OVERVIEW OF KEY COMPANY INFORMATION

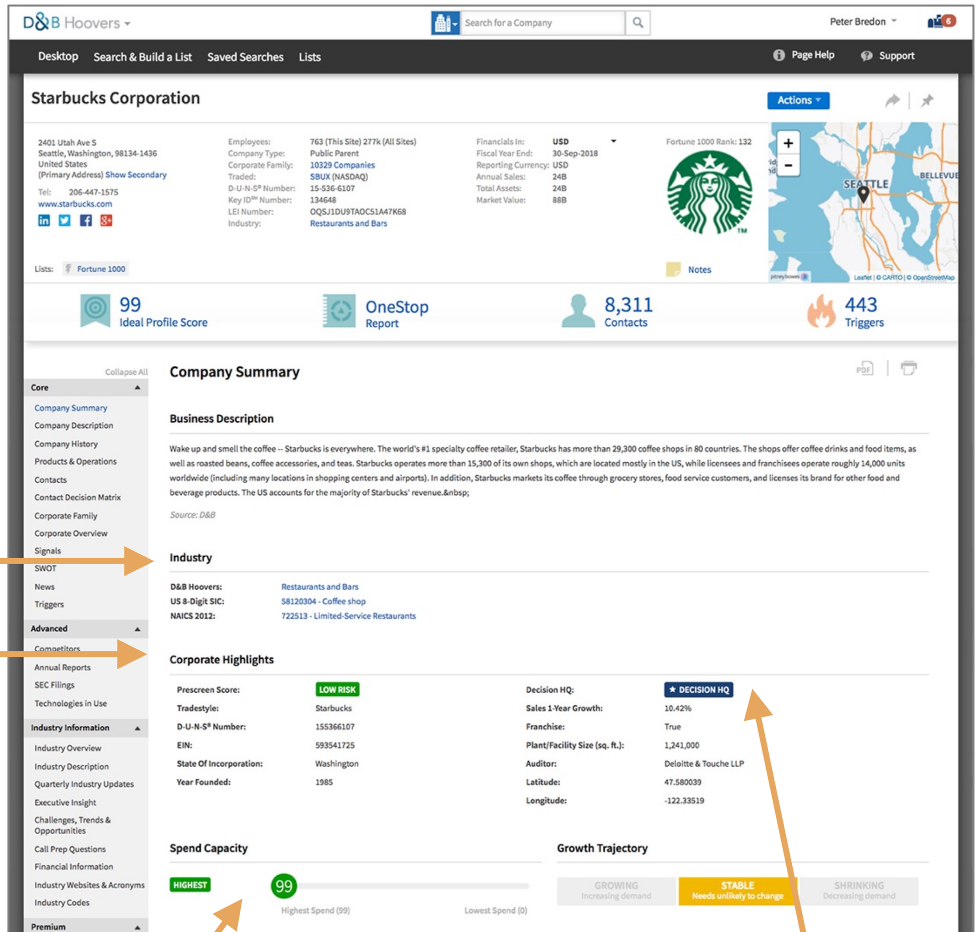
Here you will find a business description, up to three industry classifications, corporate highlights, key contacts, recent news articles, a financial summary, and a stock snapshot.

Industries

Will display a maximum of three industry classifications. The D&B Hoovers and US 8-Digit SIC classifications are included by default. If you have set your industry preference to a different classification, the third option will display that industry code. You can set your industry preferences on the User Preferences screen on the User Menu.

Corporate Highlights

Includes unique Dun & Bradstreet data points such as a prescreen score, tradestyle, diversity status, 1-year sales growth, and more.



Spend Capacity and Growth Trajectory

Spend Capacity provides insights into a company's level of spending, while Growth Trajectory tells you if a company is expected to grow, stay stable, or shrink in the next 12-18. months. Both features are part of our advanced analytics* and available with select subscription types.

Decision HQ

Identifies locations with buying power. Decision HQ is one of our advanced analytics* and is available with select subscription types.

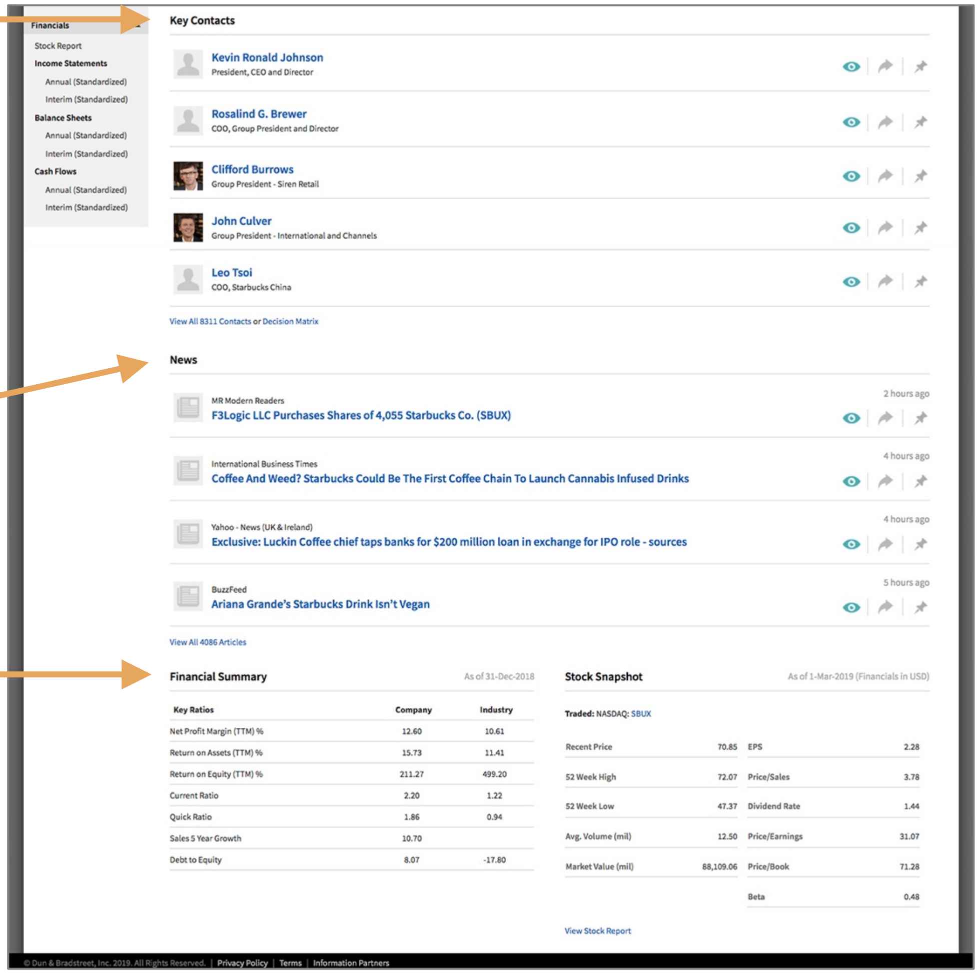
*Please refer to Advanced Insights chapter to learn more about these features.

A CLOSER LOOK AT THE COMPANY SUMMARY (CONTINUED)

Key Contacts
Access the top five contacts for this company. Click the eye icon to view the QuickView for more details without leaving this screen. You may also click the arrow icon to share this contact or the push pin icon to pin the contact to your desktop.

News
The four most recent news articles for the company are listed on the Company Summary.

Financial Summary and Stock Snapshot
Review key financial results.



Corporate Family Report

NAVIGATE THE ORGANIZATION TO REVEAL OPPORTUNITIES

The Corporate Family Report provides a comprehensive look at the corporate hierarchy and organizational structure for this company.

Expand/Collapse Sections

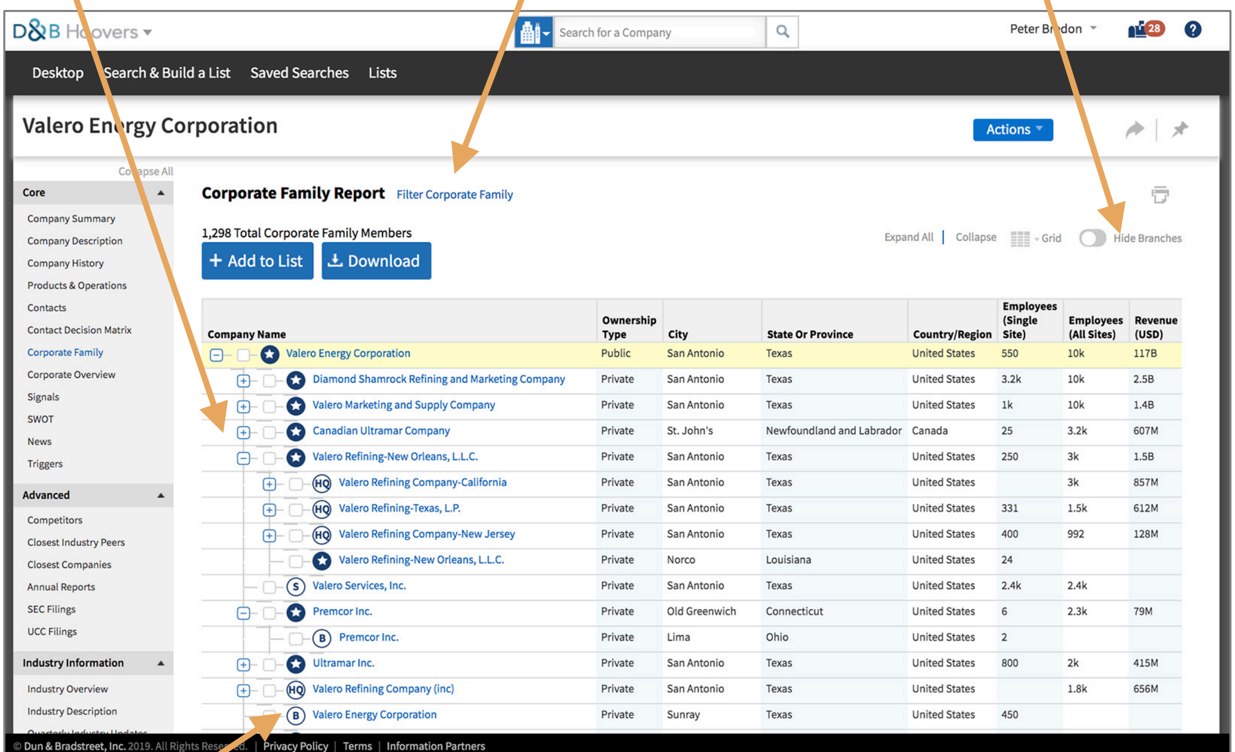
Click the +/- symbols to expand or collapse a parent or subsidiary and all of its immediate child locations.

Filter Corporate Family

Apply any filters from the Search & Build a List Form to focus your view.

Hide Branches

Toggle to hide branches for easier navigation of larger trees.



Entity Type Indicators

Each location of the Corporate Family is branded with an Entity Type indicator, so you can quickly recognize which locations have decision-making abilities within the tree. For example, a branch entity may not have the purchasing power that its parent or a subsidiary might.

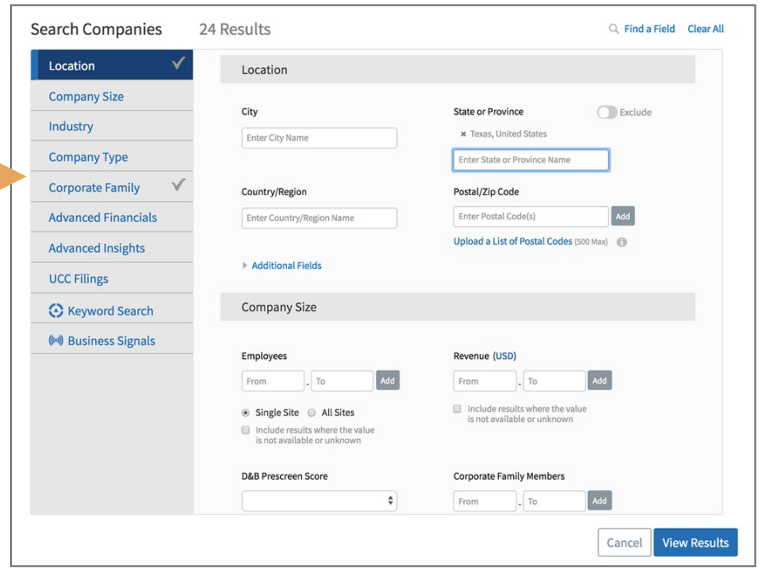
- (P) Represents a Parent within the Family Tree
- (S) Represents a Subsidiary within the Family Tree
- (B) Represents a Branch within the Family Tree
- (HQ) Represents a Headquarters location.
  This designation is assigned to parent locations that have child entities.
- (★) Represents a Decision HQ location within the Family Tree.
  Our predictive indicator identifies the locations and associated contacts in a company's family tree that make buying decisions, so you can target outreach to the locations and decision makers with buying power. *(Available in select subscription types.)*

A CLOSER LOOK AT THE CORPORATE FAMILY REPORT (CONTINUED)

APPLY FILTERS TO FOCUS ON OPPORTUNITIES

Apply Filters

Any of the search filters on the Search & Build a List Form may be used to filter the tree. For example, you can add location filters to reveal opportunities in your territory.



A Filtered Tree

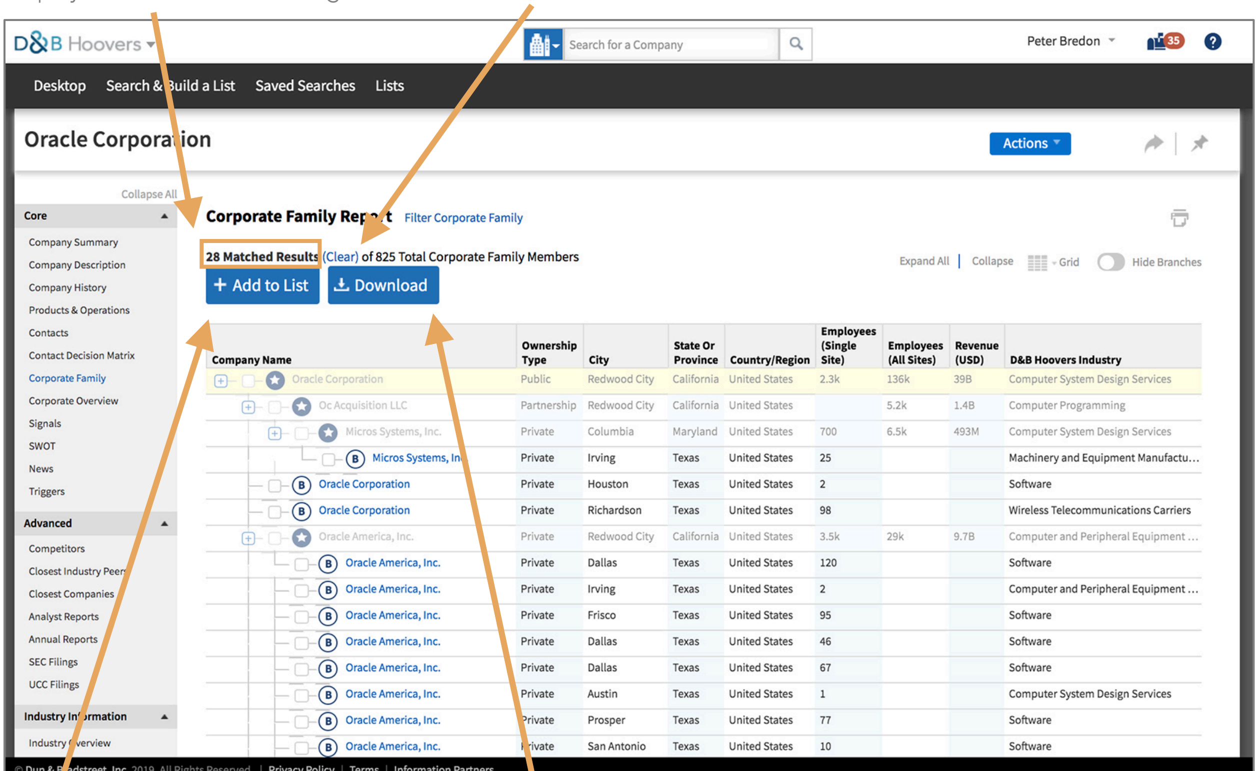
When search criteria are applied to a Corporate Family Report, all family members that match that criteria will be displayed in the tree. In addition to the tree members that matched the entered search criteria, the parents of those tree members are displayed in grey text to maintain the hierarchy structure.

Results Count

Displays a count of all matching results.

Clear Filters

Click *Clear* to remove applied filters.



+Add to List

Select the checkbox next to an entity to add it to an existing list or create a new list.

Download

Select the individual items you want to download or download all of your filtered results.

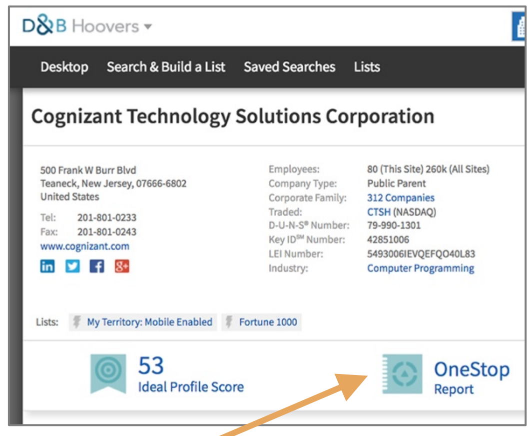
OneStop Report

PACKAGE BUSINESS INFORMATION INTO A SHAREABLE PDF FILE

One of the most popular features in D&B Hoovers, a OneStop Report provides an easy way to package reports from a Company Profile into a portable and shareable PDF file. This is a helpful resource when preparing for meetings or getting a team member up to speed on an account.

How to Create a OneStop Report

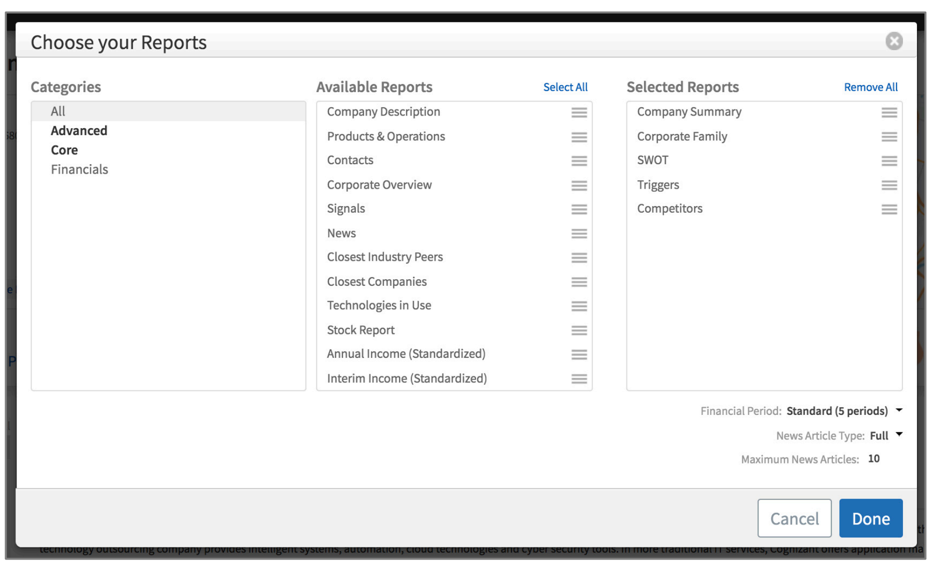
1. Open a Company Profile.
2. Click *OneStop Report.*
3. Select the reports you want to include in your OneStop Report. The dialogue box will display a list of all reports that are available for inclusion. Click a report name in the "Available Reports" column and it will be added to the "Selected Reports" column. If you need to remove a selected report, click the name in the "Selected Reports" column.
4. Your OneStop Report will display the selections in the order they are listed in the "Selected Reports" column. You can rearrange the order by dragging the report to a new position in the "Selected Reports" column.
5. Click *Done* to generate your report.



OneStop Report
Click *OneStop Report* on a Company Profile to get started.

Choose Your Reports
Click a report name to add it to the "Selected Reports" column. Easily navigate through the list of available reports by selecting a category in the column on the left.

You can adjust the order of your reports by dragging a report name to a new position in the "Selected Reports" list.



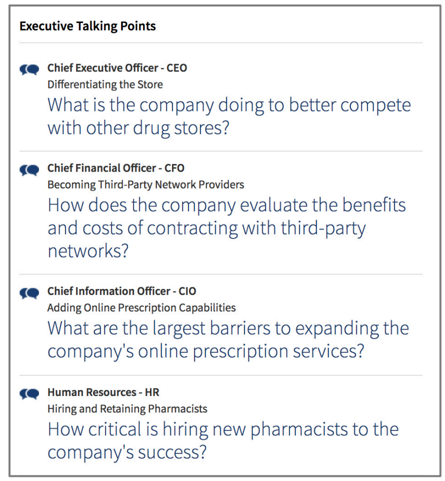
First Research Industry Profiles

GAIN A DEEPER UNDERSTANDING OF YOUR MARKETS & CUSTOMERS

First Research Industry Profiles provide market insights that help you better understand the trends, opportunities, and challenges that impact your customers, so you can have more meaningful engagement with your accounts and prospects without time-consuming research. First Research is included with select subscriptions.

First Research Industry Profiles can help you:

- Prepare for sales calls
- Create business plans and presentations
- Build forecasts and establish benchmarks
- Understand market size and the competitive landscape
- Provide litigation support and business valuations
- Perform due diligence



Call Prep Question & Talking Points
Each profile includes call prep questions and talking points that identify topics that could be top of mind for a decision maker in this industry.

Each First Research Industry Profile Includes Nine Reports

1. Industry Overview

   Gathers key highlights from the nine reports that comprise the profile. Here you will find fast facts, an industry growth rating, industry indicators, and talking points.

2. Industry Description

   Provides a description of the industry, competitive landscape, products and operations, sales and marketing, finance and regulation, regional and international issues, and human resources.

3. Quarterly Industry Updates

   Provides updates on events that are impacting the industry.

4. Executive Insight

   Reviews issues that may be top of mind for the C-Suite. Provides talking points that can be used as conversation starters.

5. Challenges, Trends & Opportunities

   Overview of key business challenges, trends, and opportunities within the industry.

6. Call Prep Questions

   Provides questions and talking points for specific areas within an organization, such as operations, marketing, finance, and technology. Offers insight into topics that could be top of mind for your customer. Use this information to identify topics you can discuss during your meeting.

7. Financial Information

   Access company benchmark trends and information, as well as economic statistics and valuation multiples.

8. Industry Websites & Acronyms

   Provides links to useful industry websites and a glossary of acronyms to help you decipher industry lingo.

9. Industry Codes

   Provides a list of industry codes that are associated with this industry.

How to Access First Research Industry Profiles

First Research Industry Profiles can be accessed within a Company Profile or by searching for a profile via a Research & Reports search on the Search & Build a List Form. Please see the next page for screenshots of this functionality.

First Research on a Company Profile

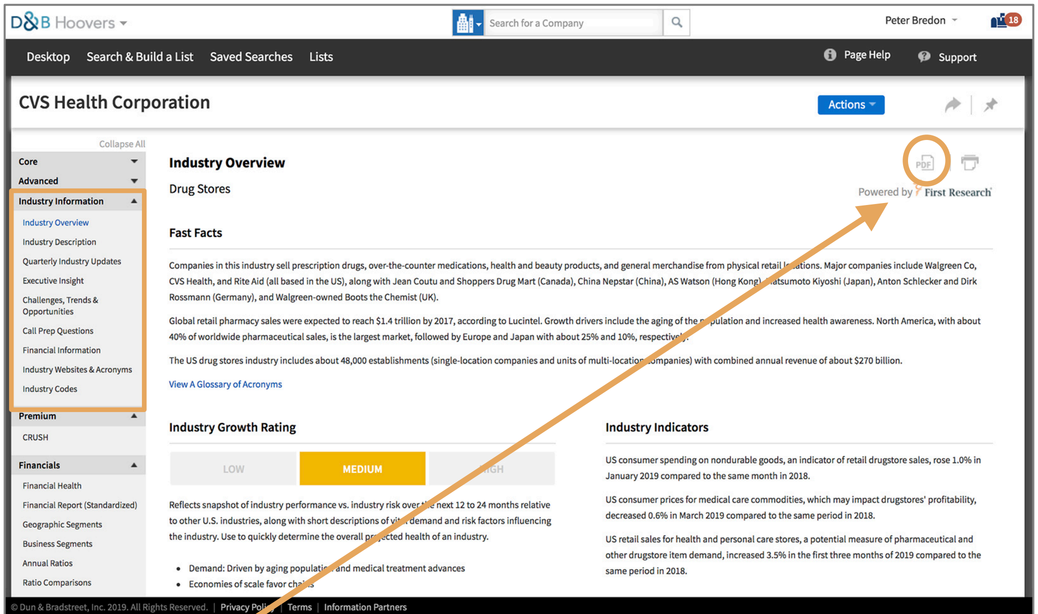
1. Open a Company Profile.
2. Navigate to the Industry Information section of the report menu on the left side of the screen. The First Research profile displayed on the Company Profile aligns to the 8-digit US SIC code that is assigned to the company. If you are looking for a different industry, you can search for other profiles with a Research & Reports search on the Search & Build a List Form. See next item for more detail on how to leverage search to find a report.

First Research via a Research & Reports Search

1. Go to the Search & Build a List Menu and select *Research & Reports*.
2. Navigate to the Research & Reports section of the search form.
3. Choose *First Research* as the "Report Type". This will create a list of all First Research Industry Profiles.
4. You can refine this list by adding relevant keywords to the "Title" field, such as "automobile" or "power".
5. Click *View Results* to a see a list of related profiles.
6. Click a report name to open the profile.
7. Navigate to the Industry Information section of the report list on the left side of the screen to open any of the reports that are included in the First Research profile.

FIRST RESEARCH ON A COMPANY PROFILE

Industry Information
The nine reports in a First Research Industry Profile can be accessed under the Industry Information section of the report list.

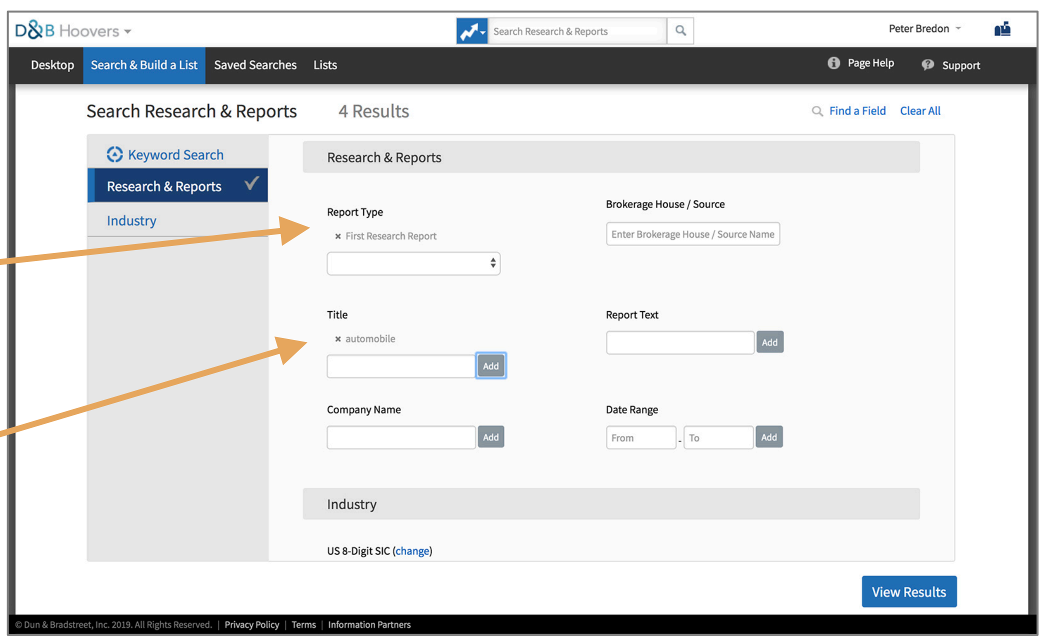


Download a PDF
Click the PDF icon to download the complete First Research Industry Profile for this industry. Note: you can also include First Research in the creation of a OneStop Report.

FIND FIRST RESEARCH PROFILES VIA A RESEARCH & REPORTS SEARCH

Report Type
Select *First Research Report* to focus results.

Narrow Results with Title Keywords
Add a name or keyword to the "Title" field to refine the list of report options based on title.



Notifications & Notification Center

MONITOR EVENTS WITH IN-PRODUCT & EMAIL NOTIFICATIONS

In this section we will cover:

- Notifications in D&B Hoovers
- How to set your notification preferences
- How to enable/disable notifications
- How to access the Notification Center

D&B Hoovers makes it easy to monitor developments at your accounts and be informed of new opportunities with our notification options. You can be notified in-product and via email of trigger alerts related to items on your lists, as well as new additions to SmartLists®.

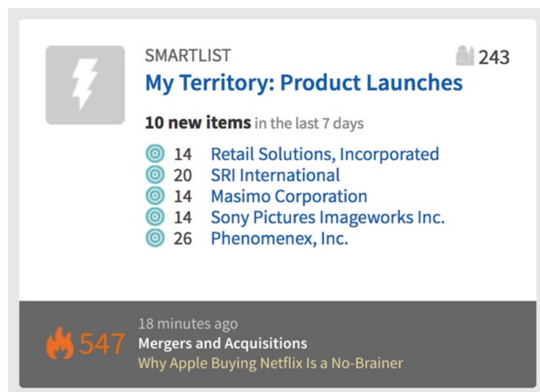
TWO NOTIFICATIONS TYPES HELP YOU GET IN THE DOOR FASTER

Real-Time Trigger Alerts

D&B Hoovers works behind the scenes to monitor company events, such as executive changes, contract wins, and merger and acquisitions, and then pushes those updates to you via real-time trigger alerts. Choose from 70+ trigger types to stay informed of breaking developments at your accounts.

Triggers can help you:

- Be alerted to reasons to call
- Monitor accounts to stay engaged and anticipate threats
- Get the right message to the right people at the right time



Desktop Tiles Reveal Opportunities

This is a SmartList tile that was pinned to the D&B Hoovers Desktop. The grey bar at the bottom of the tile shows a count of all triggers related to the companies on this list, plus the most recent trigger alert for this list. You can mouse over the bar to see more triggers for this list.

The tile also shows us how many companies were added to this SmartList within the last week and displays the most recent additions.

New SmartList Entries

SmartLists dynamically update when D&B Hoovers finds new companies or contacts that meet your list criteria.

SmartLists can help you:

- Get in the door faster
- Monitor your territory
- Feed pipelines with actionable opportunities

How to Set Your Notification Preferences

1. Go to User Preferences

Click your username in the top right corner of the screen, select *User Preferences*, and scroll down to Notification Settings to get started.

2. Specify your email preferences

Choose how often you want to receive email alerts for new items in your lists and SmartLists. First, check the box next to "Send email for my notifications". Then use the drop down fields to choose the email format, frequency of delivery, time of day, and time zone.

3. Select your preferred Triggers

Expand the Trigger Types list, on the right side of the screen, to select the triggers that you want to monitor for companies in your saved lists and SmartLists. You will receive in-product notifications when any company on your list has a newly available trigger. A summary of triggers will also be included in the e-mail digest.

By default, the *Select top Default Triggers* box is selected and activates trigger monitoring for our most popular trigger types. You can select additional triggers by checking the box next to the trigger type. To stop monitoring a trigger, uncheck the box.

REAL-TIME TRIGGER ALERTS

Think of a trigger as an opportunity alarm. D&B Hoovers works behind the scenes to monitor company events, so you won't miss an opportunity to engage your customer or prospect.

Triggers can help you:

- Be alerted to reasons to call
- Increase win rates by engaging buyers faster
- Monitor accounts to stay engaged and anticipate threats
- Get the right message to the right people at the right time

Access triggers via:

- Company & Contact Profiles
- Desktop Tiles
- Search & Build a List
- Notification Center

Notification Settings Give You Control

Choose the types of notifications you want to receive, as well as when and where you receive the news.

Select Preferred Trigger Types

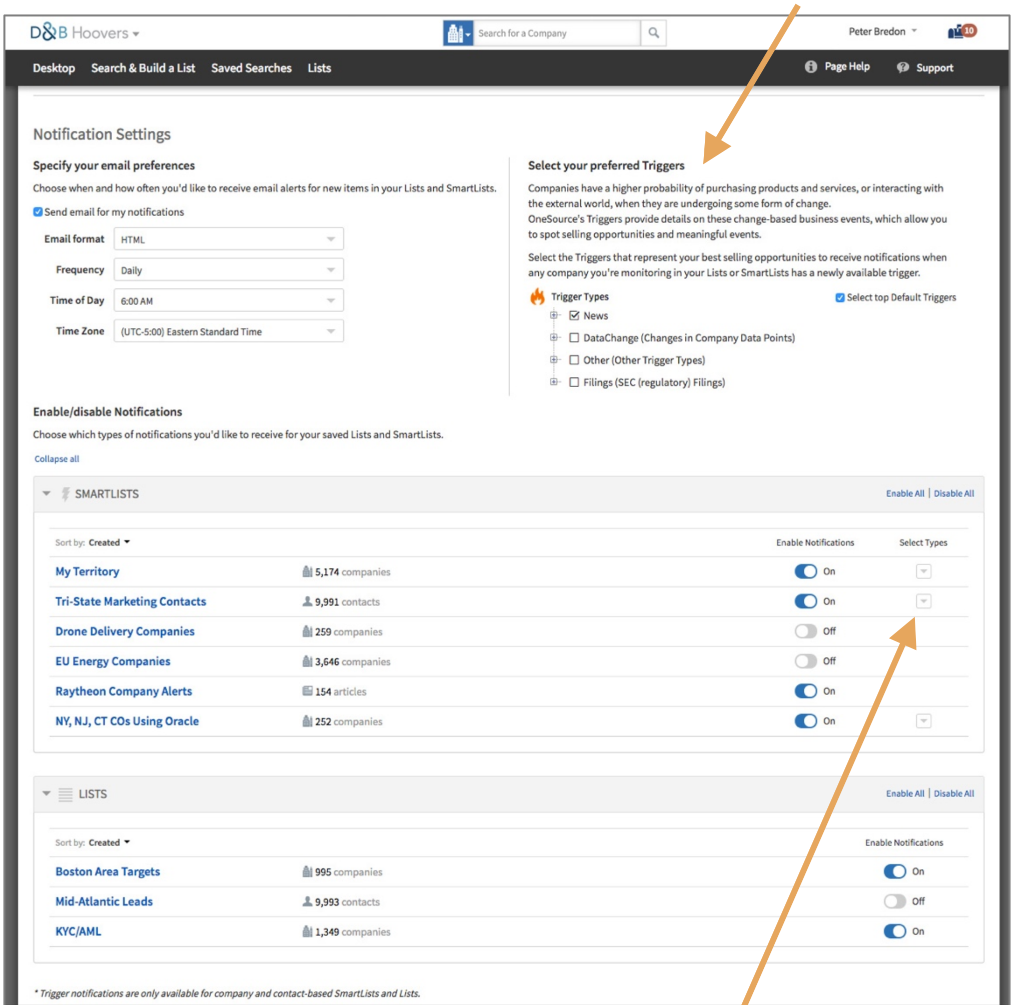
Choose the types of triggers that are most relevant to your business and you will be notified when any company in a monitored list or SmartList has a corresponding trigger.

Email Preferences

Choose when and how often you would like to receive updates.

Enable/Disable Notifications by List

Focus your attention on the most important target companies and opportunities by enabling or disabling notifications for lists and SmartLists. Toggle the *Enable Notifications* switch to turn on or off.



Additional SmartList Options

You can choose the types of notifications you want to receive for dynamically updating SmartLists. Choose new SmartList entries, new trigger alerts, or both.

All About the Notification Center

The Notification Center provides access to all of your SmartList and Trigger notifications from the last 90 days. You can access the Notification Center by clicking the mailbox icon on the top right of the screen. The number that displays on the mailbox icon indicates how many new notifications are available.

The Notification Center can help you:

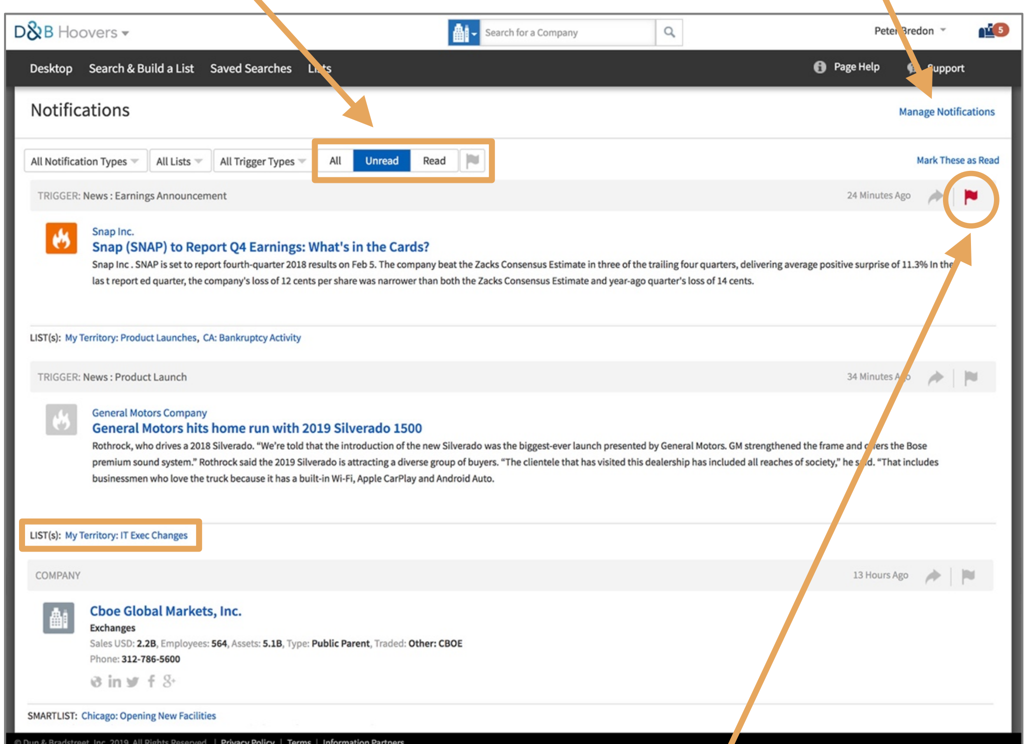
- Be alerted to events related to the companies and contacts you care about
- Focus notifications on specific SmartLists and lists to eliminate noise
- Receive updates when and where you want them with our email digest options

NOTIFICATION MANAGEMENT HELPS YOU FOCUS ON OPPORTUNITY

Filter by Status
Quickly identify the newest alerts by filtering to view unread notifications. You can also filter to view notifications that have been read, flagged, or view all.

Manage Notifications
Click to change your notification preferences, enable notifications for lists, or select triggers to monitor.

Filter by Type
Filter by notification type, list or SmartList, and/or trigger type to drill down to the content that is most relevant to your need.



List Name
Each notification indicates the list or SmartList name associated with this event, so you can easily tie the potential opportunity back to your original list.

Quick Tip
As notifications are viewed and scrolled past the top of the Notifications page header, they will automatically be marked as "Read". Notifications in a "Read" status are presented in a lighter colored font to indicate they have been reviewed, hover over a "Read" notification to restore its original font color for easier viewing.

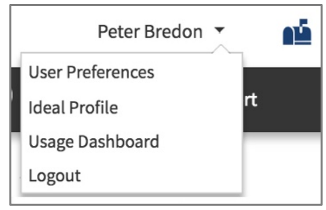
Flag for Follow-Up
Click the flag icon to mark a notification as a priority item. You'll be able to filter your view by flagged items to quickly focus on your top priorities.

User Menu

ACCESS USER PREFERENCES & MORE

The User Menu can be accessed by clicking your username in the top right corner of the screen. Here you can access the following menu options:

- User Preferences
- Ideal Profile®
- Usage Dashboard



User Preferences

User Preferences provides access to the following user-defined settings:

- General Settings: Here you can update your account information, change your password and choose locale settings.
- Notifications Settings: Specify email preferences, select preferred Triggers and enable/disable notifications for lists and SmartLists®. More information on these options can be found in the Notifications & Notifications Center section.

Choose Your Locale Settings

Locale settings control scale, currency, distance units, region, and preferred industry.

Scale

Scale allows you to determine the level of truncation when data is displayed and entered into numeric filters. When viewing financial data on a Company Profile, the default display will then be in the chosen scale. When setting filter values in fields such as Revenue, Assets, and Employees the value will automatically reflect the chosen scale. For example, if the scale is set to millions and "50" is entered in the Revenue (As Reported) field, D&B Hoovers will search on 50,000,000. Options include:

- Millions (mil)
- Thousands (000)

Currency

Currency allows you to determine the currency displayed while using D&B Hoovers. Options include:

- US Dollar (USD)
- British Pound Sterling (GBP)
- Euro (EUR)

Distance Units

Distance Units sets the default for radius-based search criteria. Options include:

- Miles
- Kilometers

Region

Region selection does not currently drive behaviors in D&B Hoovers, though it may be utilized in the future. Options include:

- North America
- Europe
- United Kingdom
- Asia Pacific

Industry

Industry controls the default classification system for industry filters in advanced search. The default industry classification will also display on the Company Summary Report on the Company Profile. Available industries include:

- D&B Hoovers
- ANZSIC 2006
- ISIC Rev 4
- NACE Rev 2
- NAICS 2017
- US SIC 1987
- UK SIC 2007
- US 8-Digit SIC

Ideal Profile

Ideal Profile gives you an opportunity to create your own custom target profile in D&B Hoovers. Build your profile by selecting Business Signals® that represent the activities of your target market or best customers, such as businesses that are opening new facilities or showing signs of venture financing activity. Then we will assign an Ideal Profile Score to every company in our database, to help you understand how closely a company aligns with your target criteria. The higher the score, the closer the match to your profile.

More details on Ideal Profile and instructions for how to create your own custom Ideal Profile in D&B Hoovers can be found in the Business Signals & Ideal Profile section of the User Guide.

Usage Dashboard

The Usage Dashboard helps you understand how you compare to other users in your organization and gain visibility into how you are using the key product components of D&B Hoovers that will help you work most efficiently.

Overall Product Usage
Graph shows your usage trends as compared to the organization average.

Select Time Period
See usage for a specific time period.

User Profile Score
Your score measures your level of engagement and helps you understand if you are getting the most out of D&B Hoovers. The score is calculated in relation to the best practice areas showcased on the dashboard.

Rank
Provides visibility into where you fall amongst your peers.

Profile Completeness
Identifies personalization settings that should be completed to help you take full advantage of the product's notification and search capabilities. Click any item to quickly configure settings without leaving the dashboard.

Best Practice Areas
Each box represents one of the key things you should be doing to get the most out of the application. A combination of leveraging this functionality in tandem with your actual usage volume determines your usage score.

Events by Activity
Helps you understand how you spend your time by grouping activities into three key areas: researching, prospecting, and monitoring.

Sharing Content With Users

EASILY SHARE COMPANIES, CONTACTS, NEWS & TRIGGERS

Sharing makes it easy to interact with other users and help each other stay informed of what is happening at an account. For example, a sales manager can send a trigger alert to a team member to alert them to an opportunity they should follow up on.

You can share the following content with other D&B Hoovers users on your account:

- Company Profiles
- Contact Profiles
- Trigger alerts
- Lists and SmartLists®
- Saved searches

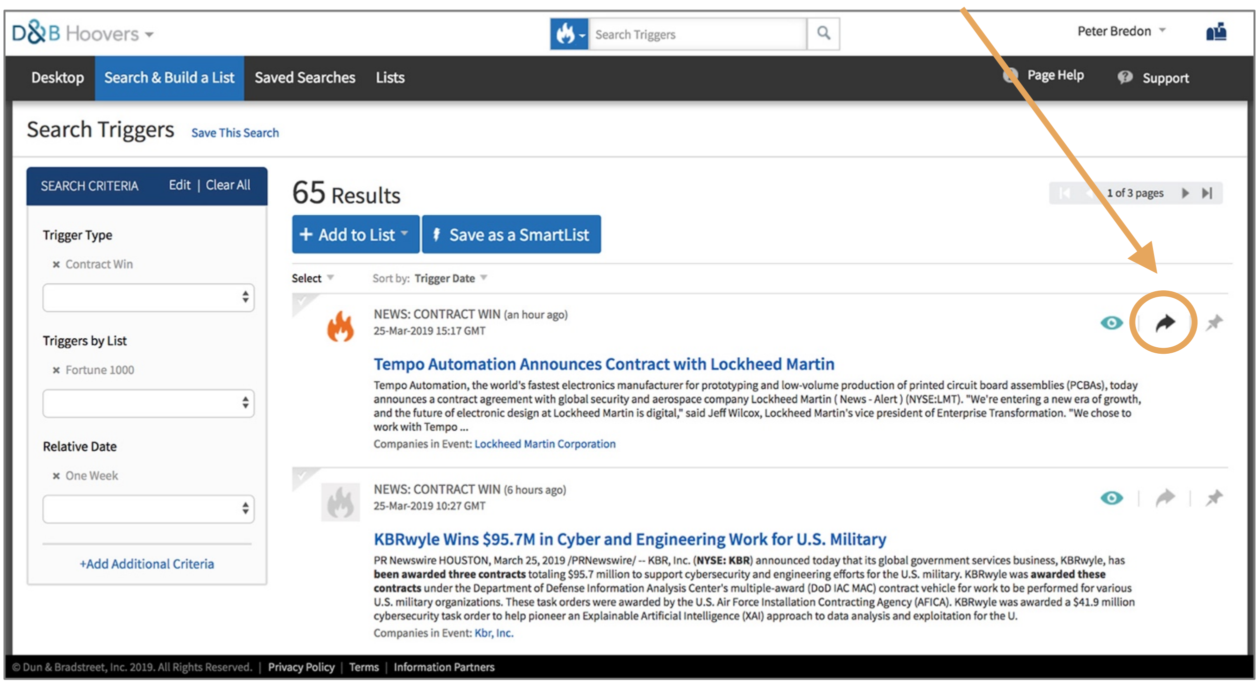
How to Share a Piece of Content

Simply select a piece of content, designate the recipient(s), and D&B Hoovers will send an email notification with a direct link to the content in the application.

Step 1: Select Content to Share

Click the arrow symbol to select the content you want to share. The share icon can be accessed within saved lists and search results or by opening a piece of content, such as a Company Profile or news article. In the example pictured below, we are sharing a trigger alert that we found by conducting a trigger search.

Click the Arrow Icon to Share

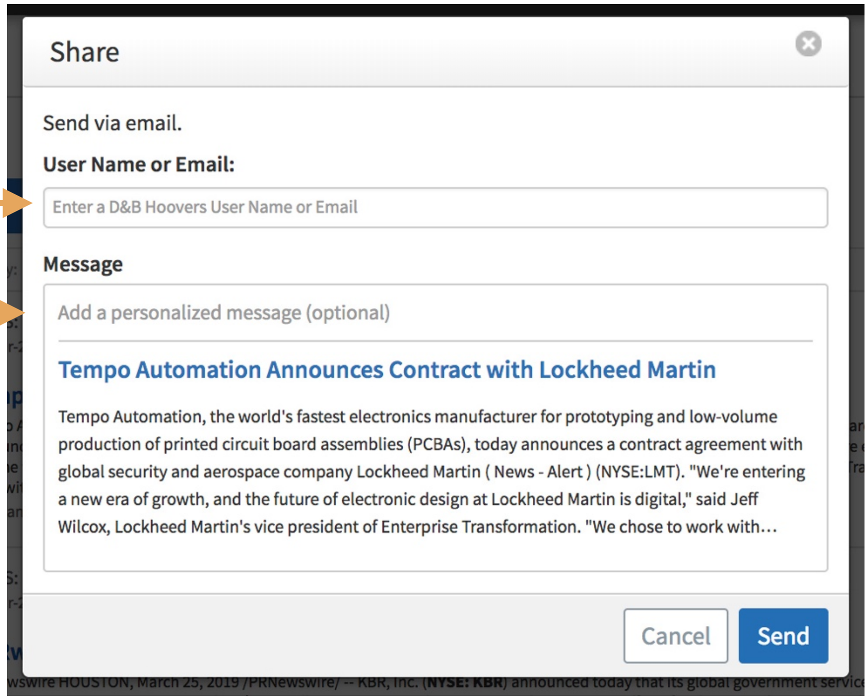


Step 2: Designate Recipients

Enter the D&B Hoovers user name or email address of the person you want to share this content with in the "Share" dialog box. You can also add a personal message in the message box before clicking *Send*. Please note, content can only be shared in this manner with other D&B Hoovers users on your account.

Designate Recipient
Enter a D&B Hoovers username or the user's email address.

Add a Message
You can choose to add a personalized message to prompt the recipient on what to do with this content.



Quick Tip:
Start typing a user name or email address in the "User Name or Email" field and D&B Hoovers will generate a list of users that match your keystrokes.

Step 3: Recipient(s) are Notified via Email

Recipients will receive an email with a direct link to access this content within D&B Hoovers.

Tips & Tricks for Sharing

Shared Lists Share Updates

When you share a list with another user, any future modifications your make to that list will be automatically applied to your shared list. The recipient of your shared list can also clone that list to make modifications to their own version.

Conceptual Search®

CONNECT CONCEPTS TO COMPANIES & IDENTIFY NEW, UNEXPECTED OPPORTUNITIES

Conceptual Search is a unique feature of D&B Hoovers that leverages news, social media, global business information, and more to connect companies with the people, industries, and topics they are related to and talking about. For example, if you are trying to find companies that have experienced a data breach you can use Conceptual Search to generate a list of companies that have either experienced a data breech or are discussing this issue in the news.

Conceptual Search Examples

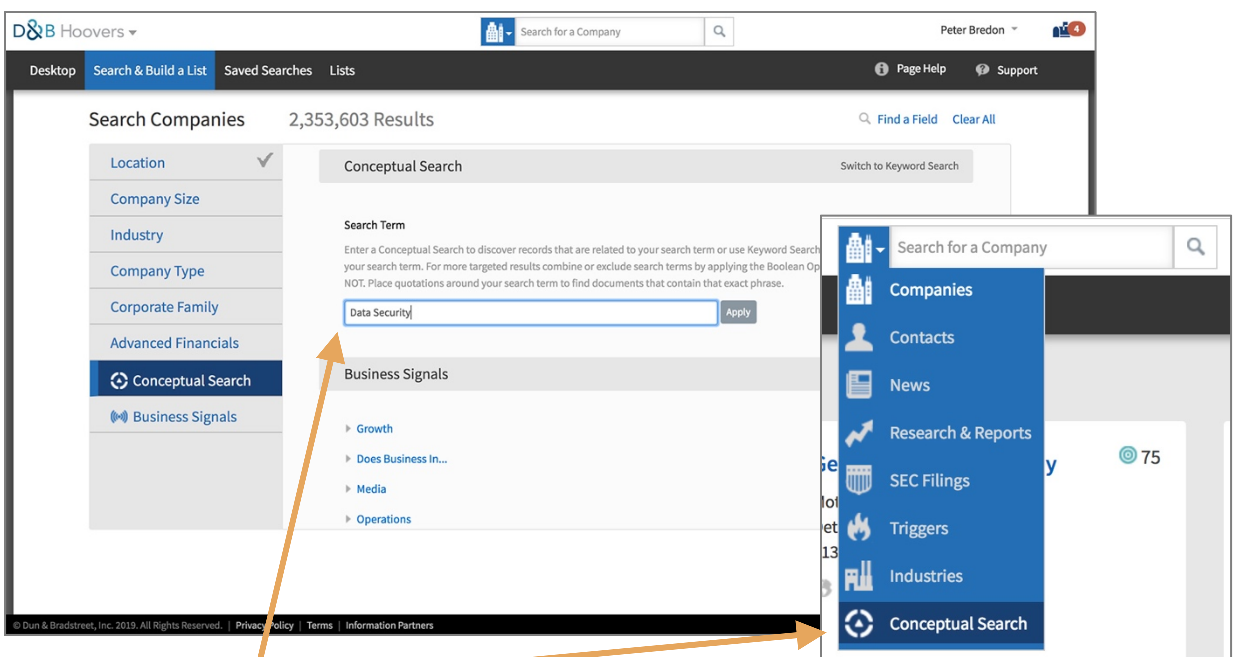
- Emerging technologies, such as drone delivery or smart grid technology
- Hot topics, such as healthcare or green energy
- Current events, such as data security or corporate daycare

Benefits of Conceptual Search

- Identify companies in emerging technologies that don’t yet have an industry code
- Get in the door faster by identifying opportunities your competitors are not aware of

How to Initiate a Conceptual Search

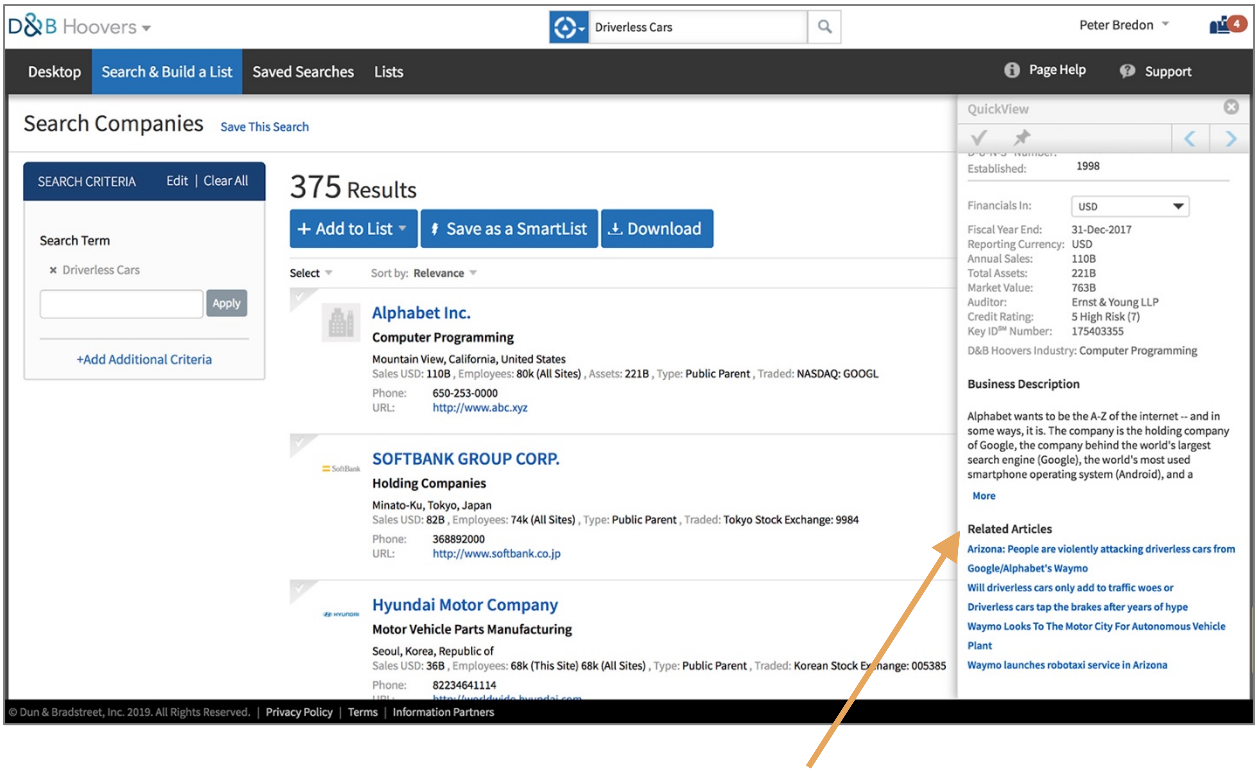
You can begin your Conceptual Search via the Global Search Bar or add a Conceptual Search topic to your search criteria on the Search & Build a List Form.



Search by Concepts and Topics
Access Conceptual Search via the Search and Build a List Form *(above)* or the Global Search Bar *(right)*.

Understand the Connection

Click the eye icon next to an item to open the QuickView pane to get a better understanding of how this company is connected to your topic. The “Related Articles” section displays recent news articles for this company. In this example we searched for driverless cars and you can see the term used in the first three articles listed.



View Related Articles

A list of news articles at the bottom of the QuickView pane provide additional insight into how this company is connected to your search topic.

Click the eye icon next to an item to open the QuickView.

Quick Tip

Save a Conceptual Search query as a SmartList and be notified when new companies connected to your topic are identified.

Business Signals® & Ideal Profile®

IDENTIFY COMPANIES THAT ARE ENGAGING IN ACTIVITIES THAT SIGNAL OPPORTUNITY

Business Signals provide insight into business behaviors and trends and can be used to create your own Ideal Profile in D&B Hoovers, so you can understand how closely a company aligns with your target criteria. Business Signals and Ideal Profile are included with select subscriptions.

What is a Business Signal?

D&B Hoovers analyzes news, financial filings, and more to measure activity related to certain business behaviors. We call these Business Signals and assign a score from 0-100 based on the level of activity for that business behavior or characteristic over the last 90 days. Business Signals provide insight into the trends that are shaping that business. For example, Business Signals can tell you if the company is showing signs of bankruptcy activity, experiencing legal issues, engaging in partnerships, or pursuing FDA approval.

Business Signals tell you how likely a company is to engage in an activity, so you can better understand their challenges and potential.

Business Signals Can Help You:

- Evaluate if a company meets your needs
- Better position your offering
- Uncover upsell opportunities
- Leverage a richer vocabulary for defining and identifying targets

Business Signals can be accessed in the following ways:

1. Search Filters

Add a Business Signal to your criteria on the Search & Build a List Form to identify companies that are exhibiting signs of that business behavior or characteristic.

2. Signals Report on the Company Profile

The Signals Report provides a list of the Business Signals that are relevant for that company. Each Business Signal includes a score from 0-100 to help you understand how prevalent the behavior has been over the last 90 days. This report provides a unique perspective on what is happening at that company and can help you better understand the issues that may be top of mind with decision makers.

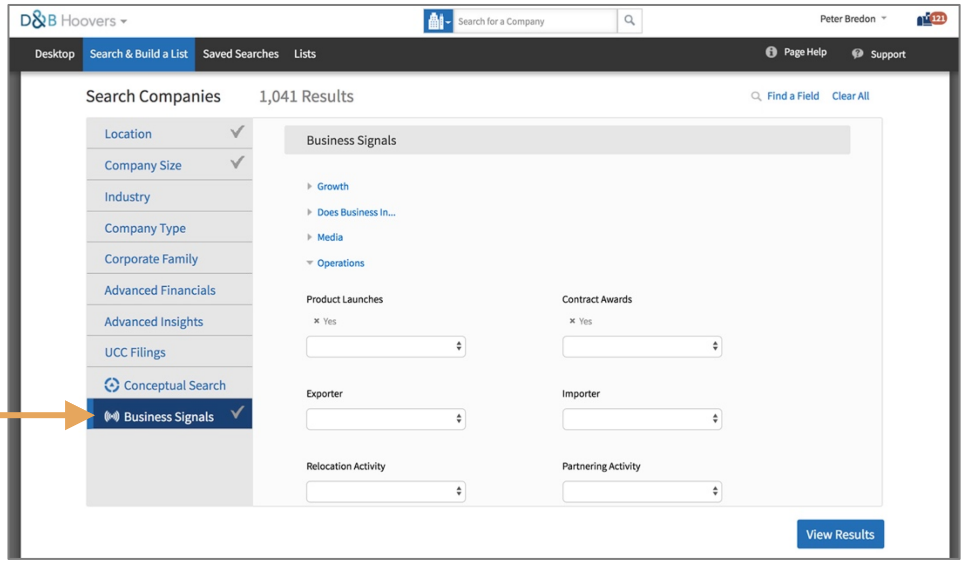
3. Ideal Profile

Business Signals are the building blocks for your custom Ideal Profile in D&B Hoovers.

BUSINESS SIGNALS ON THE SEARCH & BUILD A LIST FORM

Add Business Signals to your search to quickly identify companies that are engaging in behaviors that may represent selling opportunity for your business.

Business Signals
All Business Signals can be found in the Business Signals section of the Search & Build a List Form. Signals are grouped into categories, such as growth, operations, and workforce.

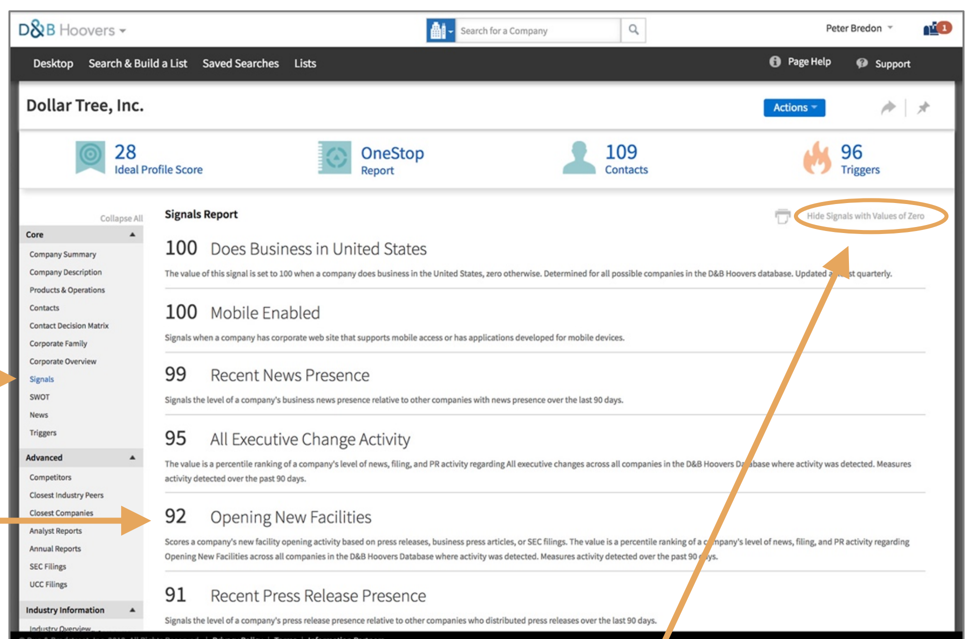


BUSINESS SIGNALS ON THE COMPANY PROFILE

Gain a unique perspective on the trends that are shaping a business with the Signals Report.

Signals Report
Click *Signals* on the Report Menu to access the Business Signals for the company.

Business Signal Score
The number quantifies the level of engagement with this business behavior over the last 90 days.

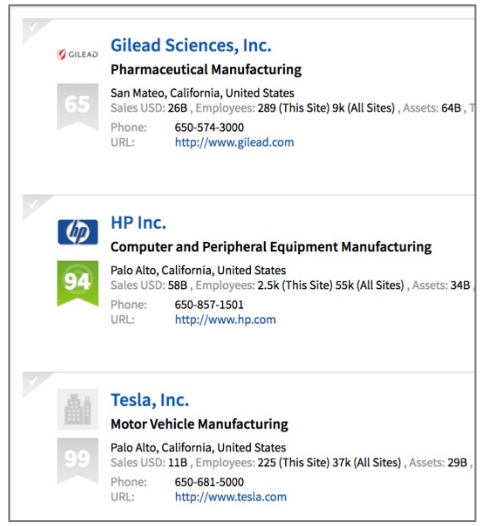


Hide Signals with Values of Zero
Click here to hide or reveal Business Signals with a value of zero.

What is an Ideal Profile?

Ideal Profile gives you an opportunity to create your own custom target profile in D&B Hoovers. Build your profile by selecting Business Signals that represent the activities of your target market or best customers, such as businesses that are opening new facilities or showing signs of venture financing activity. Then we will assign an Ideal Profile Score to every company in our database, to help you understand how closely a company aligns with your target criteria. The higher the score, the closer the match to your profile.

Ideal Profile Scores can be viewed on Company Profiles and on saved lists and SmartLists.



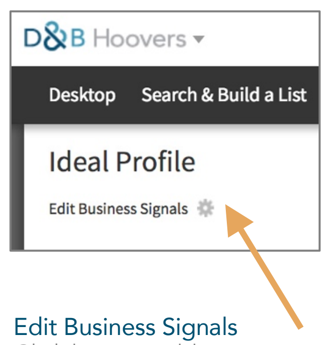
Ideal Profile Scores
View Ideal Profile Scores on a list to quickly understand how closely companies align with your Ideal Profile. The scores can help you prioritize leads for engagement. Higher scores indicate closer alignment with your profile.

Ideal Profile Can Help You:

- Prioritize opportunities
- Identify new opportunities
- Save time by focusing on the companies that match your profile

How to Customize Your Ideal Profile

1. Click your username in the top right corner of the screen and select *Ideal Profile* on the User Menu.
2. The first time you access the Ideal Profile Configurator it will display a default Ideal Profile with pre-selected Business Signals. You can choose your own Business Signals by clicking *Edit Business Signals*.
3. Check the box next to the Business Signals that you want to incorporate in your Ideal Profile and uncheck the box next to Signals you want to remove. You can mouseover a Signal name to learn more about how it is tracked. Click *Done*.
4. Now you can assign a level of importance of each Signal by adjusting the placement of the blue circle next to each Business Signal. The farther you move the circle to the right, the greater the importance of this characteristic to your profile.
5. Click *Done* when finished.
6. Changes to the Ideal Profile settings take effect immediately and will impact the scores seen throughout D&B Hoovers.
7. You can come back here at any time to change your profile.

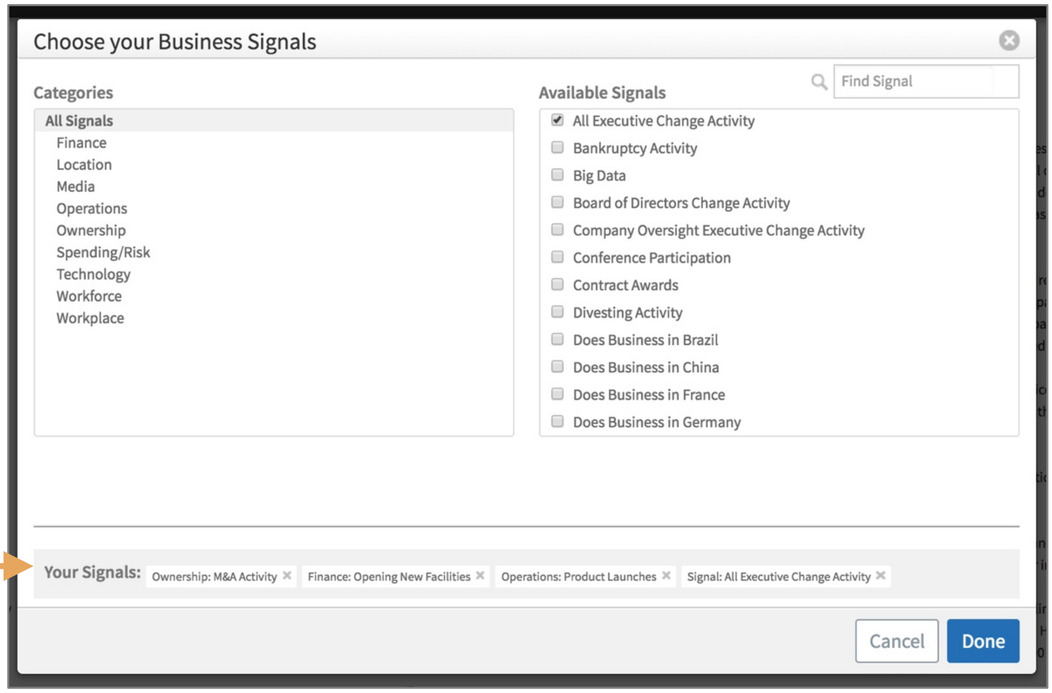


Edit Business Signals
Click here to add or remove Business Signals.

CHOOSE YOUR BUSINESS SIGNALS

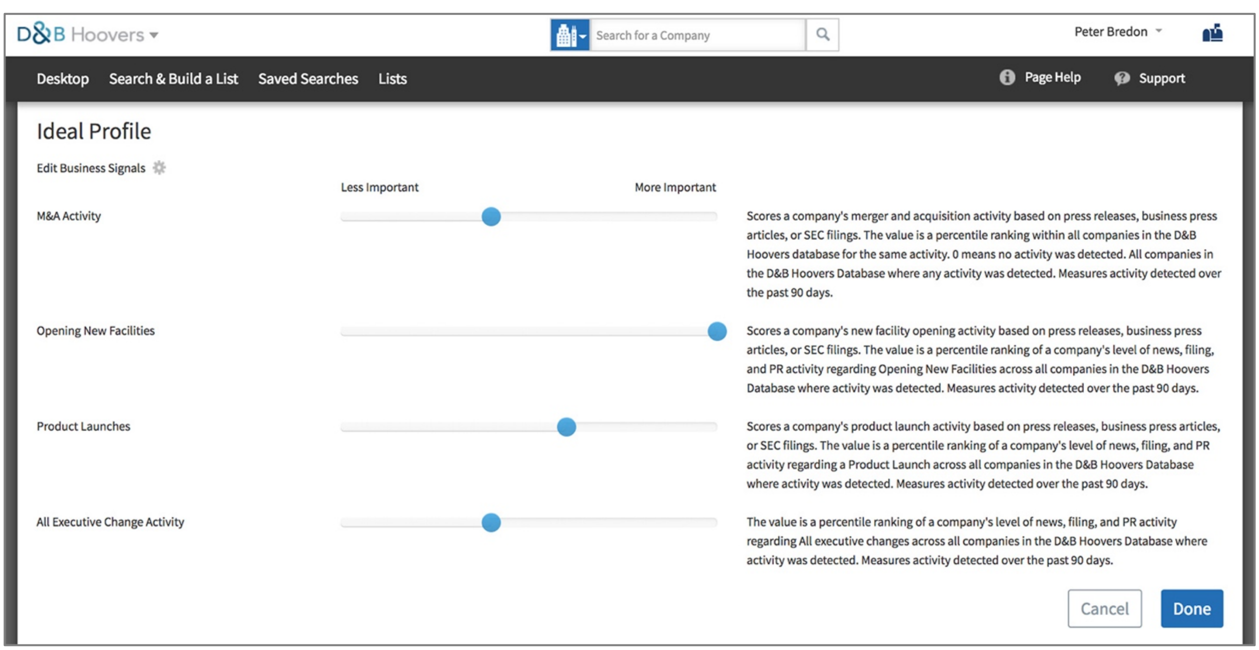
Customize your profile by selecting the Business Signals that are relevant to your business or best customers.

Remove Signals from your Profile
Click the X next to a Signal to remove it from the profile.



IDEAL PROFILE CONFIGURATOR

Adjust the sliders to assign a level of importance to each component of your Ideal Profile.



Advanced Insights

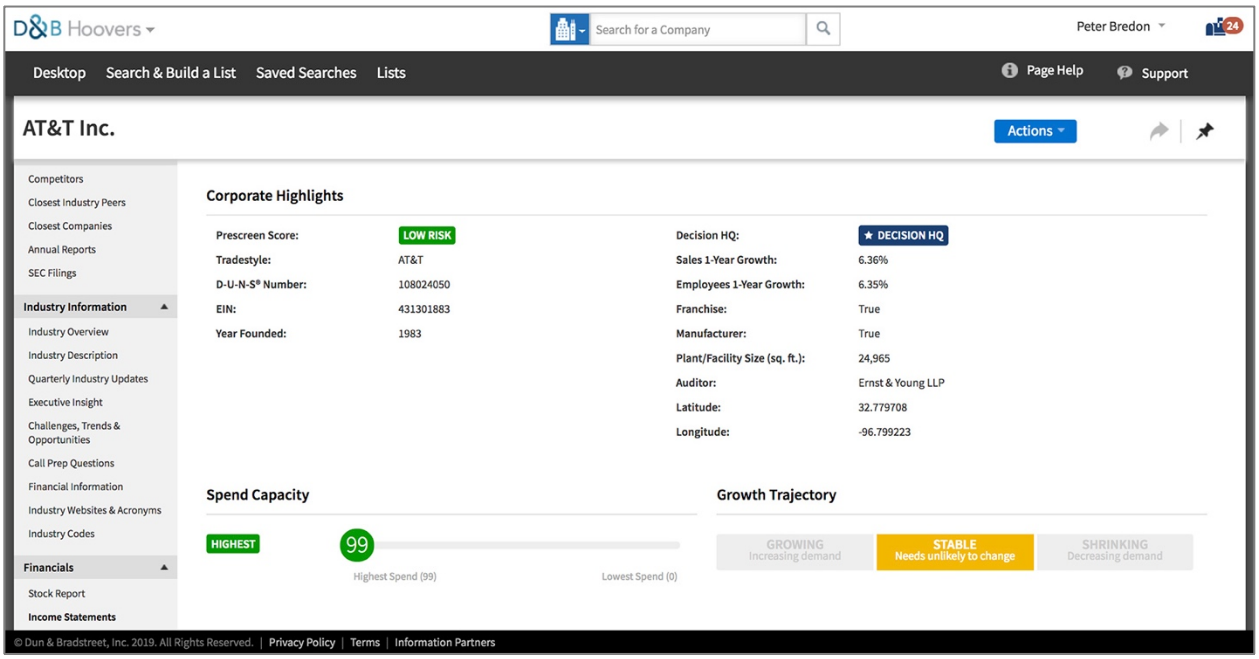
DECISION HQ, SPEND CAPACITY, GROWTH TRAJECTORY & MORE

Our new analytic features provide intelligence on a company's financial health, buying patterns, and credit-based financial activities to help you quickly target qualified prospects, make more informed decisions about an account, and engage with relevance.

Advanced Insights in D&B Hoovers include: Decision HQ, Spend Capacity, Growth Trajectory and the Financial Services Prospecting Suite. Availability of these features depends on your subscription type. If you would like to learn more about adding these features to your subscription, please contact your D&B account manager.

Advanced Insights on the Company Summary

Review Decision HQ status, Spend Capacity, Growth Trajectory and the Financial Services Prospecting Suite in the Company Summary Report on a Company Profile.



Decision HQ

Easily identify business locations where purchasing decisions are more likely to be made.

Dun & Bradstreet reviews linkages within family trees, firmographics, the presence of C-level executives, and business activities at each site to determine where the buying centers are in an organization.

Decision HQ can help you:

- Target outreach to the locations and decision makers with buying power
- Identify additional buying centers for upsell/cross-sell opportunities

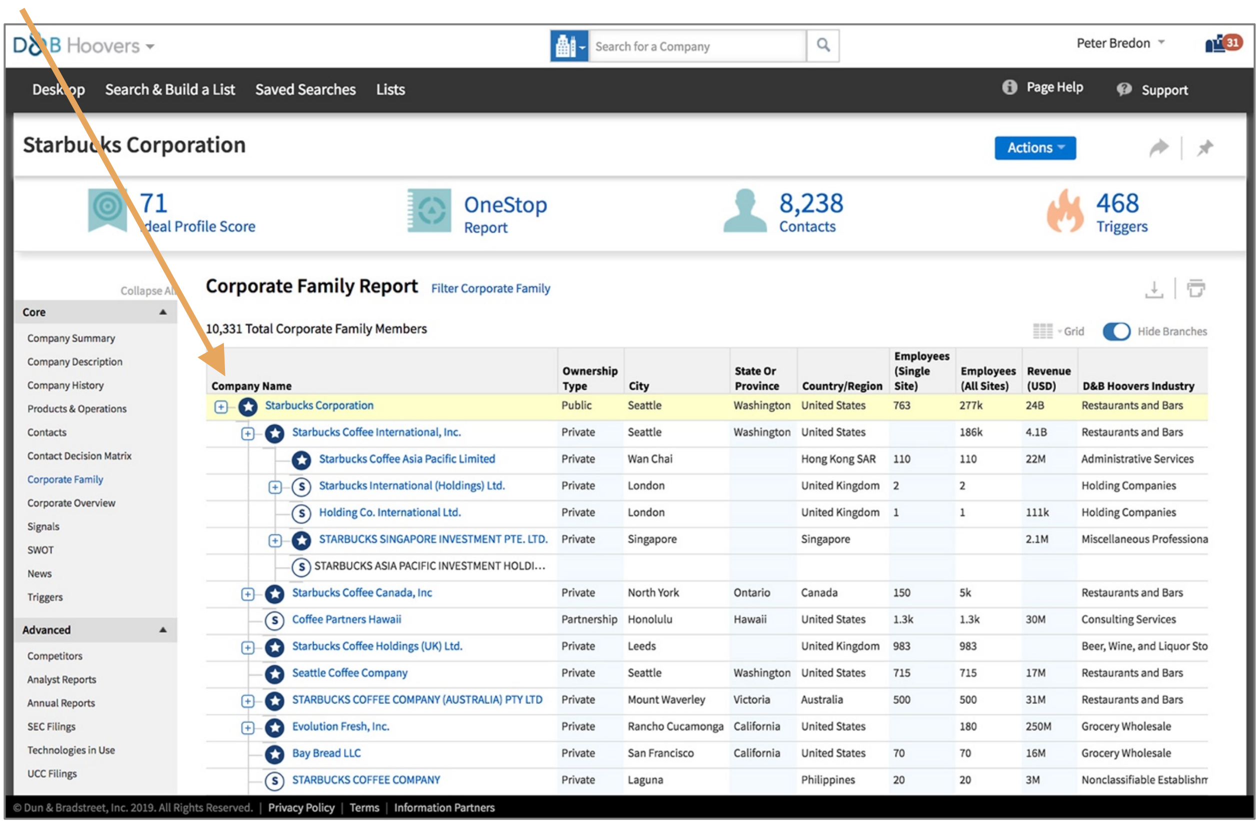
- Get to decision makers faster
- Prioritize leads by focusing on the sites with the highest-level decision-making power

Locations that are deemed to have decision-making power receive the Decision HQ designation in D&B Hoovers. This label can be found on Company Profiles and the Corporate Family Tree and will help you quickly focus on the decision makers with buying power within an organization.

Additionally, you can target Decision HQ locations with the *Is Decision HQ* search filter in the Corporate Family section of the Search & Build a List Form.

Decision HQ on the Company Summary
If a location is deemed a Decision HQ, the Decision HQ indicator *(top)* will appear. If the location you are looking at is not the Decision HQ, it will display a link to the Decision HQ location *(bottom)*.

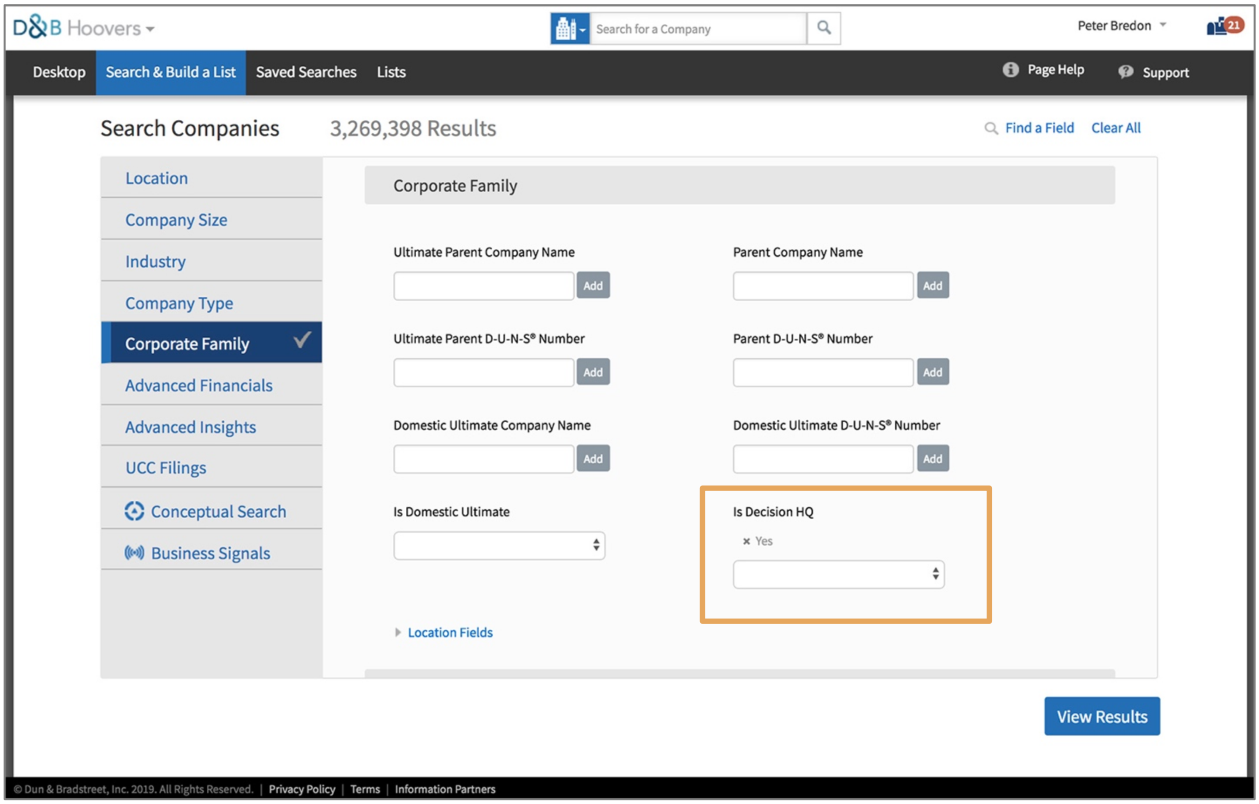
Decision HQ on the Corporate Family Tree
The star icon indicates this location has been designated a Decision HQ.



Company Name	Ownership Type	City	State Or Province	Country/Region	Employees (Single Site)	Employees (All Sites)	Revenue (USD)	D&B Hoovers Industry
Starbucks Corporation	Public	Seattle	Washington	United States	763	277k	24B	Restaurants and Bars
Starbucks Coffee International, Inc.	Private	Seattle	Washington	United States		186k	4.1B	Restaurants and Bars
Starbucks Coffee Asia Pacific Limited	Private	Wan Chai		Hong Kong SAR	110	110	22M	Administrative Services
Starbucks International (Holdings) Ltd.	Private	London		United Kingdom	2	2		Holding Companies
Holding Co. International Ltd.	Private	London		United Kingdom	1	1	111k	Holding Companies
STARBUCKS SINGAPORE INVESTMENT PTE. LTD.	Private	Singapore		Singapore			2.1M	Miscellaneous Professiona
STARBUCKS ASIA PACIFIC INVESTMENT HOLDI...								
Starbucks Coffee Canada, Inc	Private	North York	Ontario	Canada	150	5k		Restaurants and Bars
Coffee Partners Hawaii	Partnership	Honolulu	Hawaii	United States	1.3k	1.3k	30M	Consulting Services
Starbucks Coffee Holdings (UK) Ltd.	Private	Leeds		United Kingdom	983	983		Beer, Wine, and Liquor Sto
Seattle Coffee Company	Private	Seattle	Washington	United States	715	715	17M	Restaurants and Bars
STARBUCKS COFFEE COMPANY (AUSTRALIA) PTY LTD	Private	Mount Waverley	Victoria	Australia	500	500	31M	Restaurants and Bars
Evolution Fresh, Inc.	Private	Rancho Cucamonga	California	United States		180	250M	Grocery Wholesale
Bay Bread LLC	Private	San Francisco	California	United States	70	70	16M	Grocery Wholesale
STARBUCKS COFFEE COMPANY	Private	Laguna		Philippines	20	20	3M	Nonclassifiable Establishm

Decision HQ on the Search & Build a List Form

Leverage the *Is Decision HQ* filter to identify locations with buying power.



Spend Capacity

Gain insight into how a company's level of spending compares to other companies.

Spend Capacity is a spend-ranking tool that leverages proprietary Dun & Bradstreet data to model the spending capacity of businesses. We assign a score from 0-99 to each company based on their level of spending versus other companies.

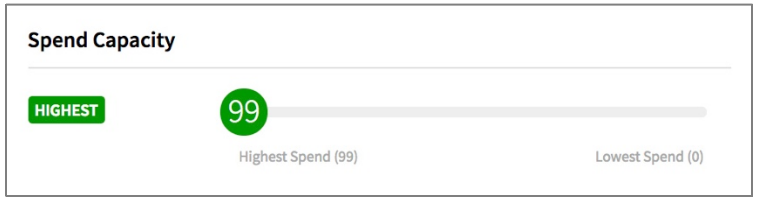
Spend Capacity can help you:

- Target companies that are more likely to have budget to spend
- Identify new opportunities based on the company's spending level
- Prioritize companies based on their spending level
- Identify cross-sell/upsell opportunities

The Spend Capacity score can be found on the Company Summary Report on Company Profiles. You can also build a list of companies by Spend Capacity Score by selecting the Spend Capacity filter in the Advanced Insights section of the Search & Build a List Form.

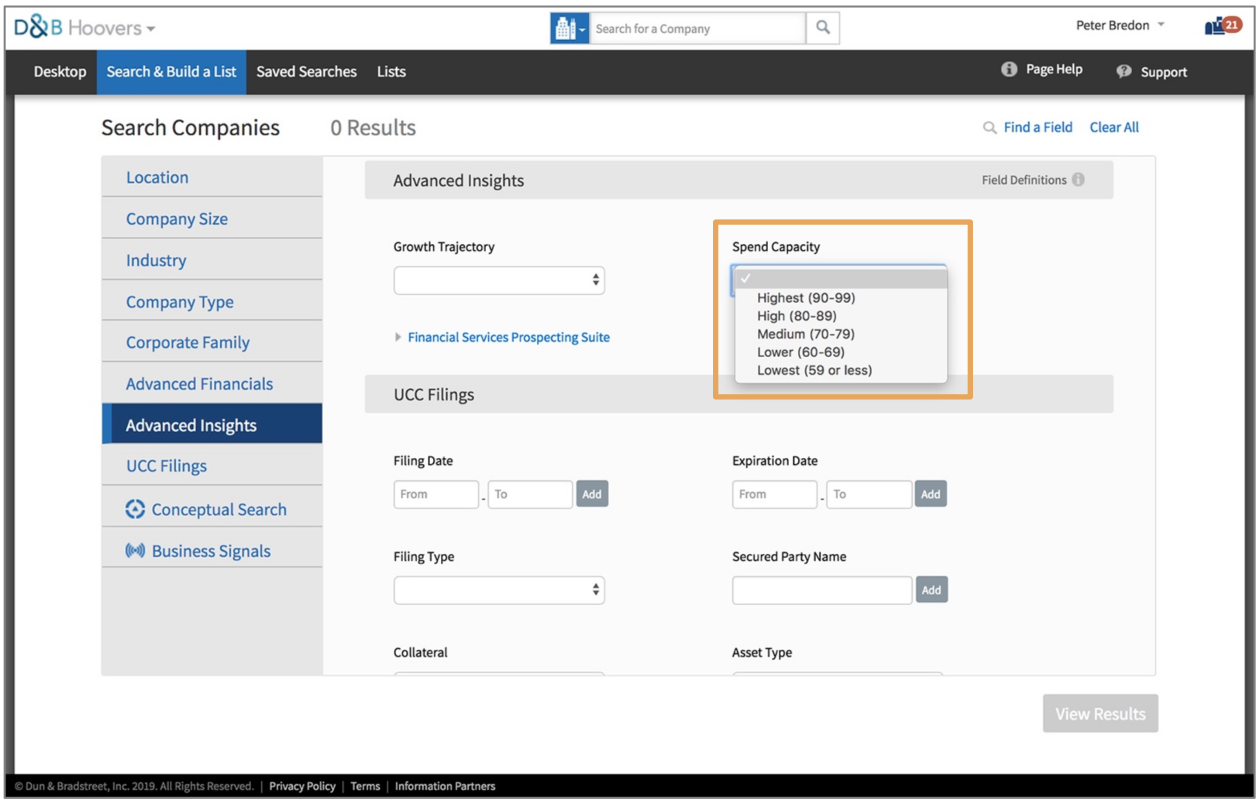
Spend Capacity on the Company Summary Report

The company's Spend Capacity is ranked on a scale of 0-99.



Spend Capacity on the Search & Build a List Form

Apply Spend Capacity criteria to your search to target results.



Growth Trajectory

Identify companies that are growing, stable, or shrinking.

Dun & Bradstreet leverages proprietary analytics to assesses risk and opportunity across key business metrics to anticipate a company's future trajectory. These metrics are summarized in D&B Hoovers to provide an overall assessment of whether an organization is expected to grow, stay stable, or shrink in the next 12-18 months.

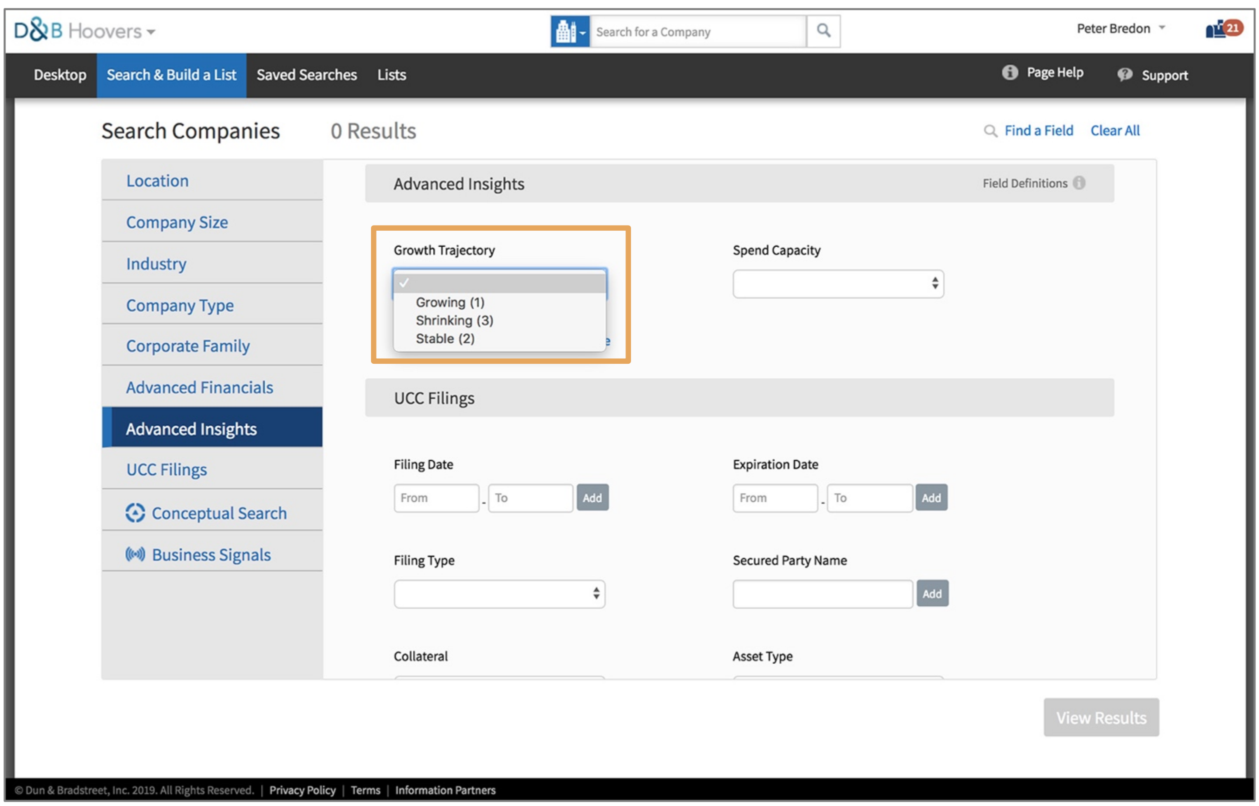
Growth Trajectory can help you:

- Better understand how to position products based on the business situation
- Identify companies with larger budgets who show signs of higher growth rates or identify organizations that show signs of decay
- Prioritize opportunities based on spending and growth rates
- Gain a competitive advantage by anticipating the future needs of a business

Growth Trajectory on the Company Summary
Growth Trajectory provides an assessment of whether a company is expected to grow, stay stable, or shrink over the next 12-18 months.

Growth Trajectory can be found on the Company Summary Report on Company Profiles and it is available as a search filter. Simply select the *Growth Trajectory* filter in the Advanced Insights section of the Search and Build a List Form.

Growth Trajectory on the Search & Build a List Form
Apply Growth Trajectory criteria to your search to find companies that are growing, shrinking, or stable.



Financial Services Prospecting Suite

Identify the financial transactions a company is likely to engage in.

The Financial Services Prospecting Suite provides six scores that predict the likelihood of a business to engage in specific financial transactions such as responding to a small business credit card offer or carrying a loan balance.

The Financial Services Prospecting Suite can help you:

- Understand if a company has the financial means to do business with your organization
- Identify upsell opportunities to companies that are using financial services products
- Target companies based on their likelihood to respond to a small business credit card offer or have an active account or open balance

Six Scores Provide Insight

Total Balance: Ranks businesses on their potential total balance on credit cards, loans, leases, and lines of credit.

Card Response Model: Ranks businesses on their likelihood to respond to a small business credit card offer.

Loan Propensity Model: Ranks businesses on their likelihood to have an active loan account.

Lease Propensity Model: Ranks businesses on their likelihood to have an active lease account.

Line of Credit (LOC) Propensity Model: Ranks businesses on their likelihood to have an active line of credit account.

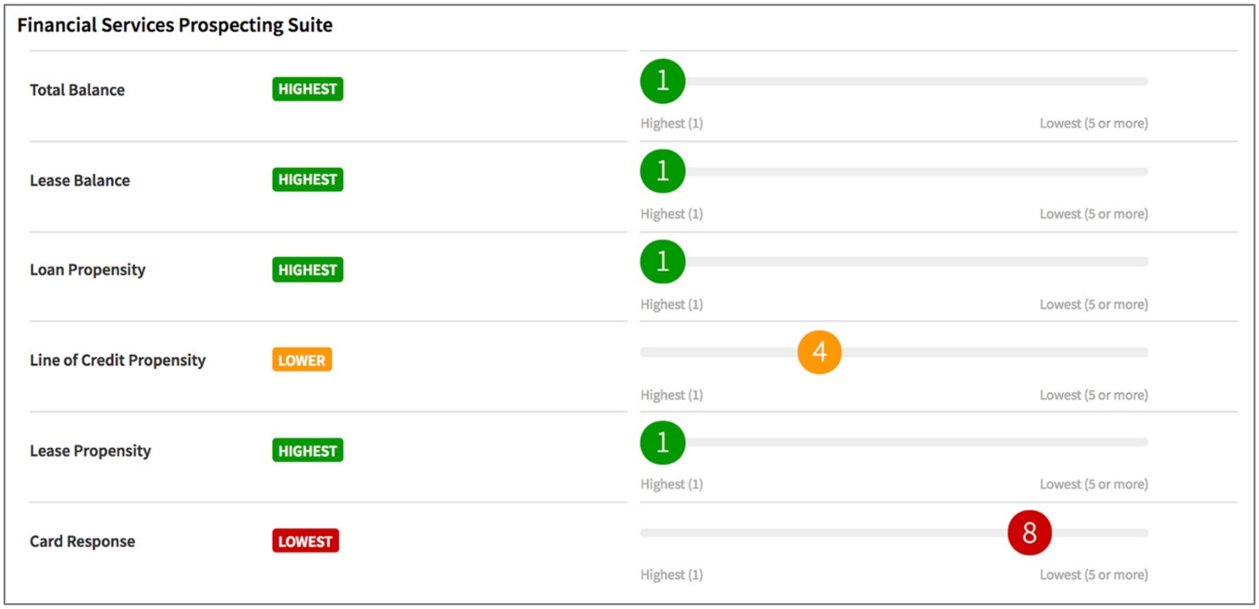
Lease Balance Model: Ranks businesses on their potential open balance on a lease account.

How to Find the Financial Services Prospecting Data

You can access a company's Financial Services Prospecting Suite scores on the Company Summary Report on Company Profiles. Additionally, the scores can be leveraged as search filters in the Advanced Insights section of the Search and Build a List Form.

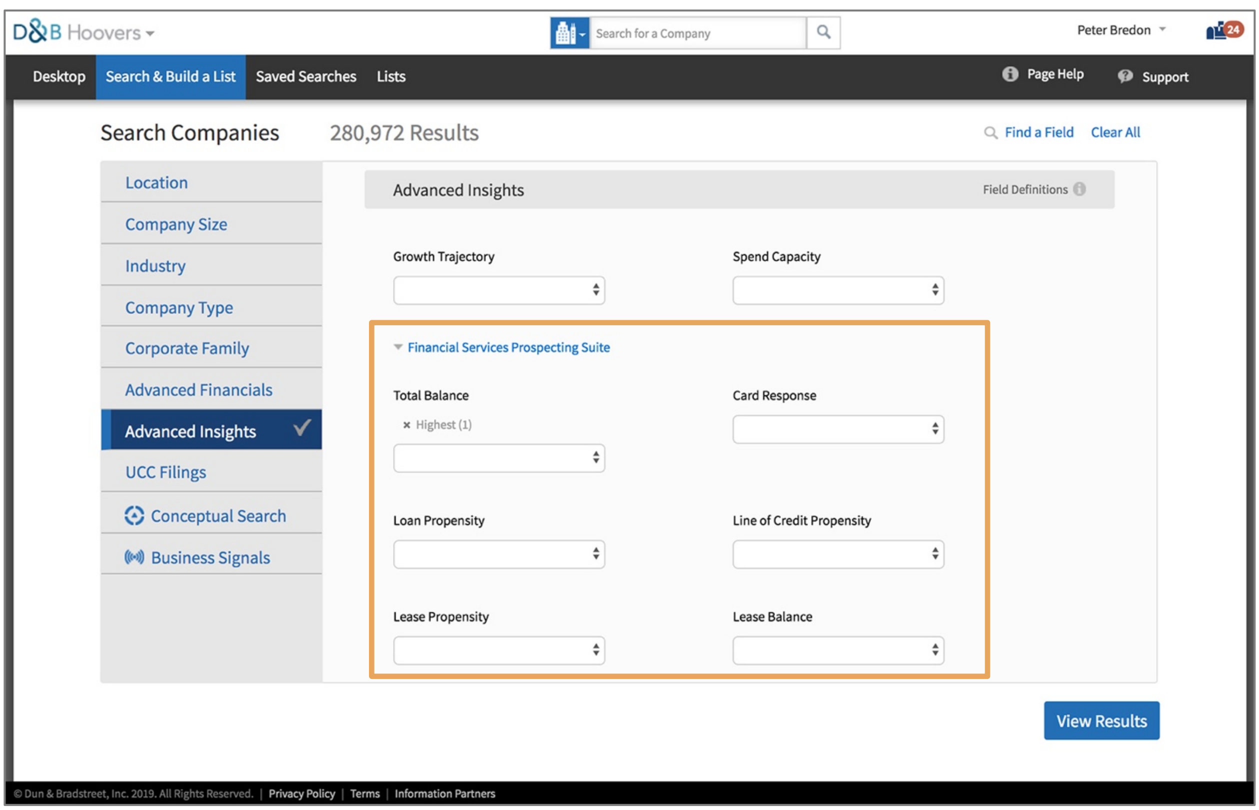
Financial Services Prospecting Suite on the Company Summary

Gain insight into the types of financial transactions the business is likely to engage in.



Financial Services Prospecting Suite on the Search & Build a List Form

Apply filters to identify organizations based on their likelihood to engage in select financial transactions.



D&B Hoovers in Your CRM

UNLOCK ADDITIONAL INSIGHTS AND FUNCTIONALITY

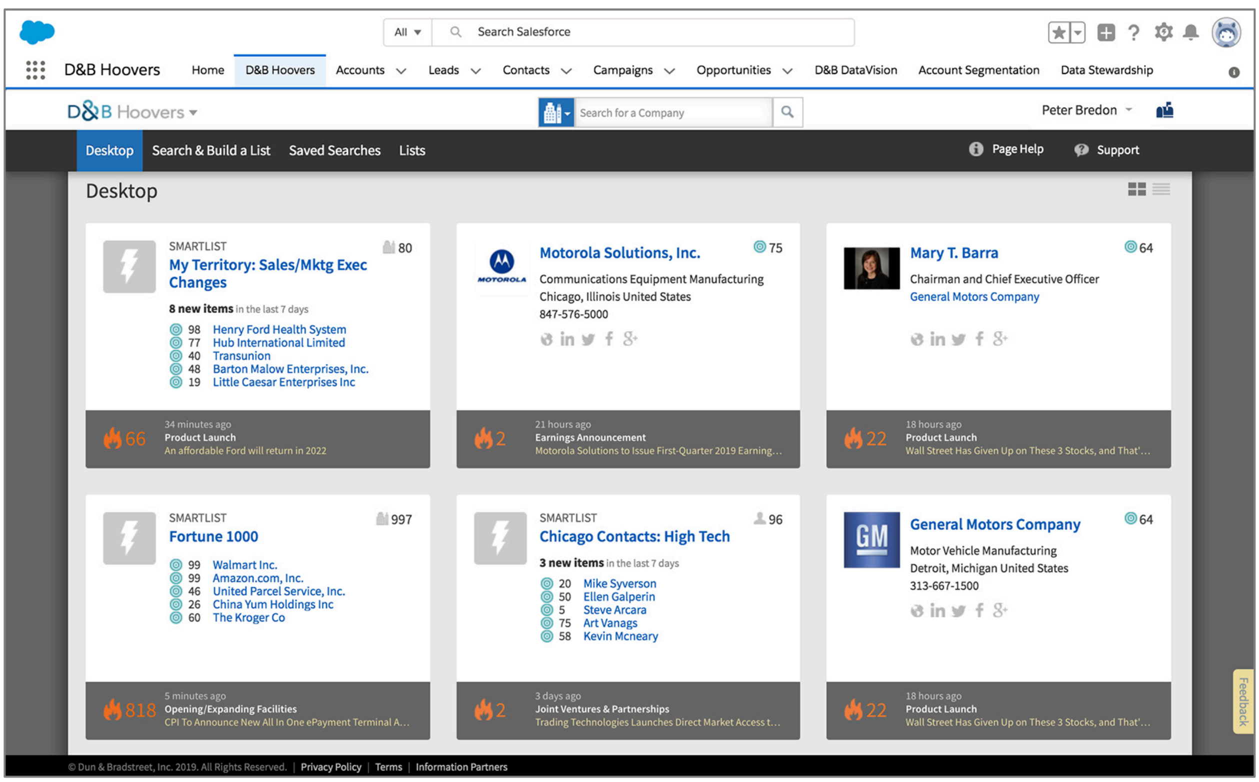
D&B Hoovers offers a full integration with Salesforce and Microsoft Dynamics, making the complete solution available within your CRM and introducing additional tools to help increase your productivity.

In this section we will cover:

- How to send records to the CRM
- How to easily create, populate, and update records to stop wasting time on data entry
- How to access insights on the QuickView Profile Widget on account, contact, and lead records
- How to identify records in D&B Hoovers that have been sent to your CRM and access or update those records
- How to create a Salesforce CRM Watchlist

Access the Full Solution in Your CRM

Access everything D&B Hoovers has to offer within your CRM. No need to leave the CRM you already work in everyday, simply click D&B Hoovers on the CRM navigation menu to open the D&B Hoovers Desktop.



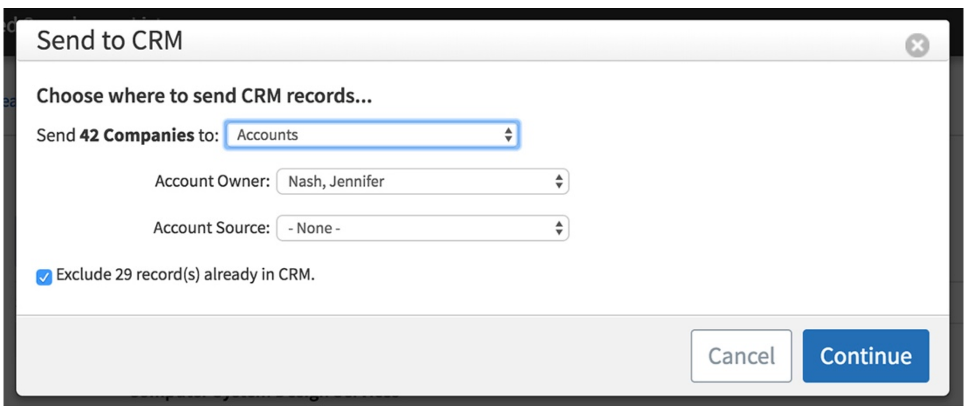
How to Send Records to the CRM

You can easily send companies and contacts from D&B Hoovers to your CRM from search results, saved lists and SmartLists, or Company and Contact Profiles.

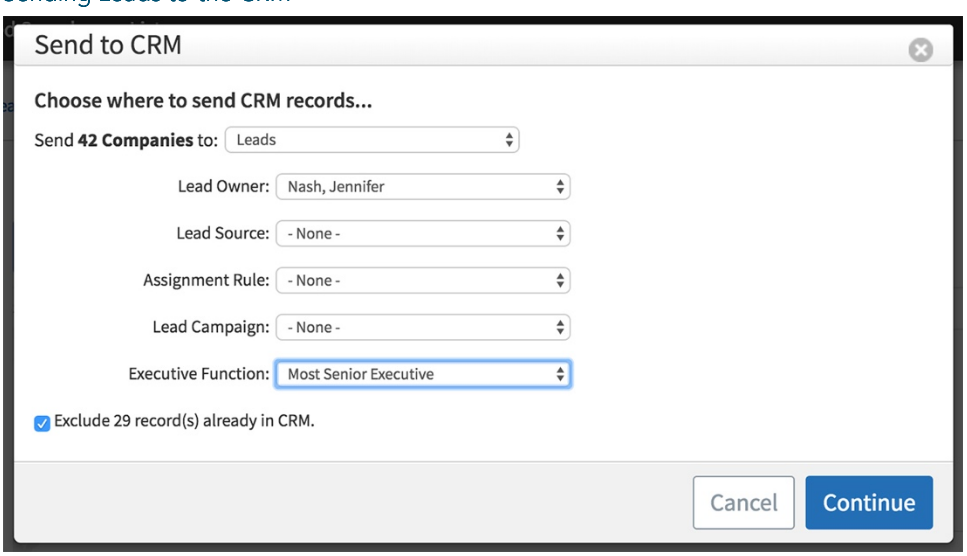
Send to CRM From a List or Search Results

1. Generate search results or open a saved list/SmartList.
2. Click the *Send to CRM* button or *Send to MAP* button as appropriate. If you only want to send select items on the list, click the check mark next to the item(s) to select them.
3. A dialogue box will open. First, choose if you want to send these records as accounts or leads. If you choose leads, you can opt to include a contact with a company record by choosing an Executive Function from the provided drop down list. For both accounts and leads, you will be asked to designate the Account or Lead Owner.
4. To avoid duplication, D&B Hoovers will exclude records that are already in the CRM. The checkbox at the bottom of the dialogue box tells you how many records will be excluded from your send. Uncheck this box if you want to include the duplicate records.
5. Click *Continue* to proceed with the send.

Sending Accounts to the CRM



Sending Leads to the CRM



Quick Tip:
Contacts & Accounts

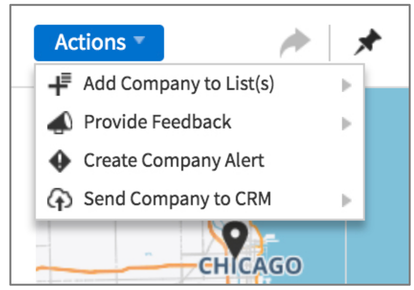
If you send a contact to the CRM and an account does not already exist in your CRM for the company associated with that contact, D&B Hoovers will create a new account record as well.

Leads, contacts, and accounts are all separate objects in the CRM, but the contact object is always tied to an account.

Send Records to CRM From a Company or Contact Profile

Send companies or contacts to your CRM directly from the Company or Contact Profile by clicking the blue *Actions* button in the top right of the screen and then selecting *Send to CRM*.

You can also send contacts from the Contacts Report on a Company Profile.



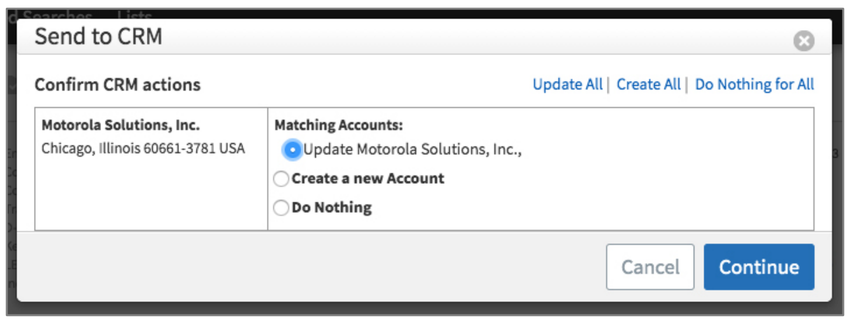
What if the Record is Already in My CRM?

When you send a record to your CRM, D&B Hoovers searches for duplicate entries. If the company or contact is already in your CRM, you will be asked if you want to update that record, create a duplicate record or do nothing, which will stop the send.

Confirm CRM Actions

Choose the action you would like to take with this record by clicking the circle next to your choice. Then click *Continue*.

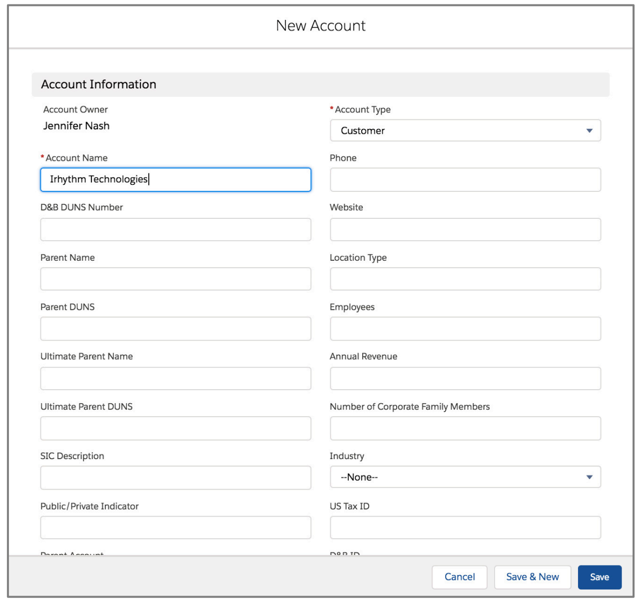
If you are sending multiple records at the same time, you can select *Update All*, *Create All*, or *Do Nothing for All* in the top right corner of the dialogue box to quickly process the records.



How to Create a Record in Your CRM and Populate it with D&B Hoovers Data

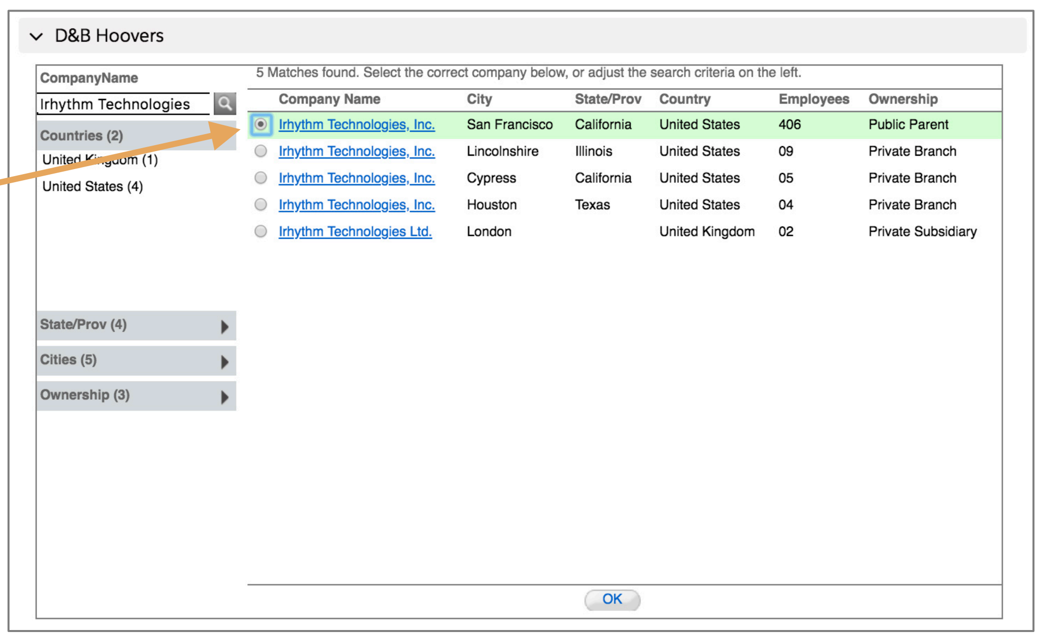
In just a few clicks, D&B Hoovers can populate your record with current data, saving you the hassle of finding and manually entering this information.

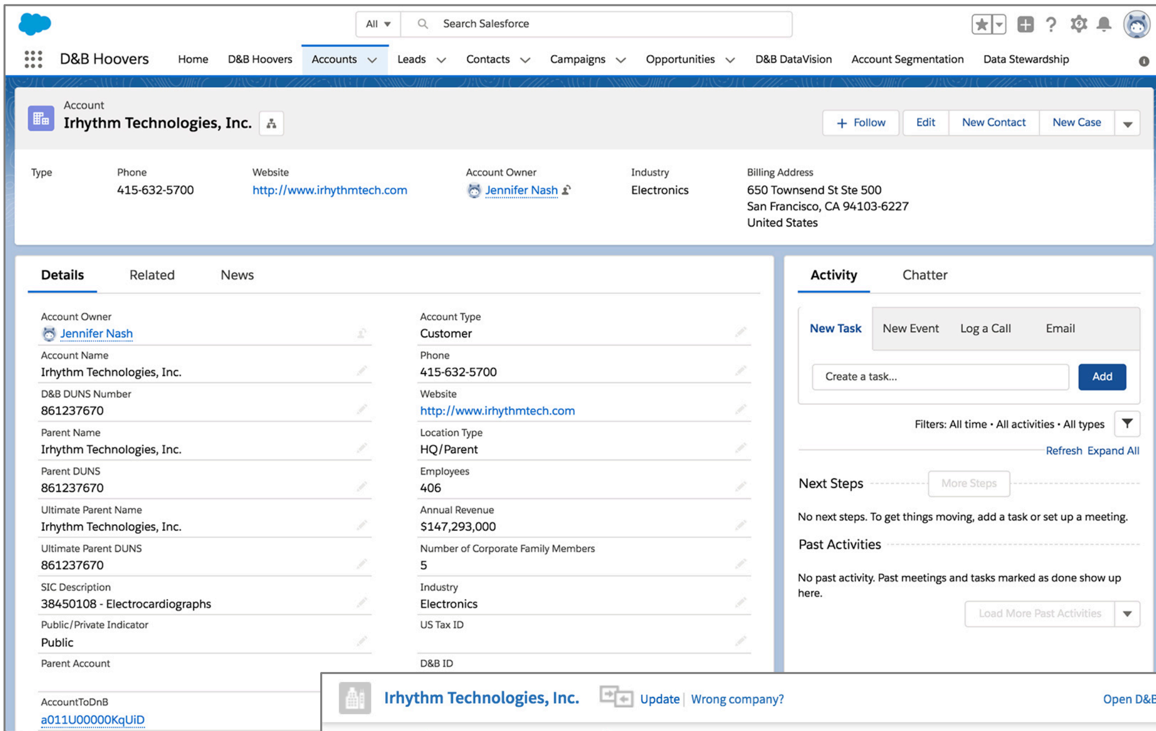
1. Navigate to create a new account in your CRM. In both Salesforce and Microsoft Dynamics, you will go to *Accounts* and select *New* or *New Account*.
2. Enter a company name and *Save* the account.
3. The account record will be empty, but you can quickly change that by scrolling down to the QuickView Profile Widget. Here, D&B Hoovers will provide a list of companies that match the name you entered. Select the appropriate company and click *OK*.
4. Now your record is populated with Dun & Bradstreet data, including the QuickView Profile Widget with additional insights from D&B Hoovers. Note, you may need to refresh your screen to view the populated record.



Create a New Account
Enter the company name and click *Save*.

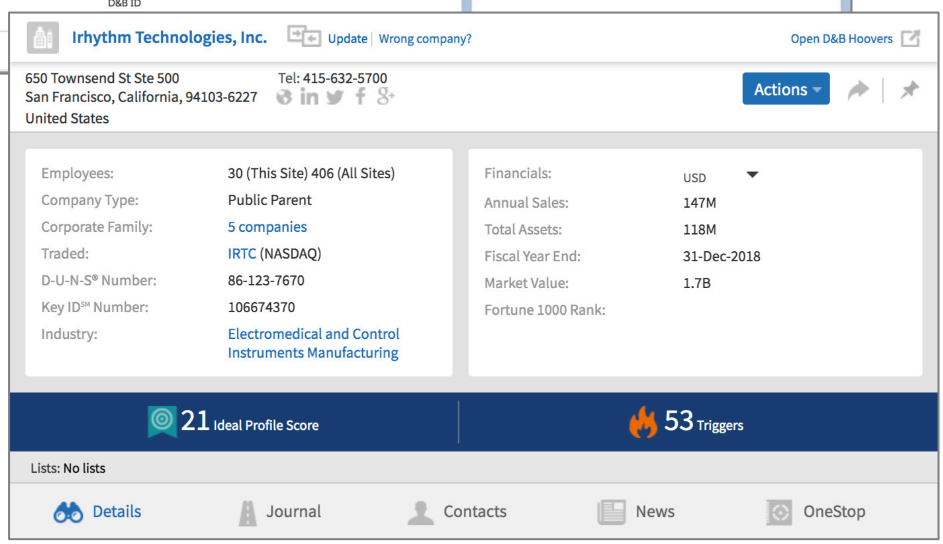
Select the Matching Company
Choose the correct match from the list and click *OK* to populate your record.





View Populated Record

D&B Hoovers will populate your CRM record with current and actionable data from Dun & Bradstreet, saving you the hassle searching for data and manually inputting it.



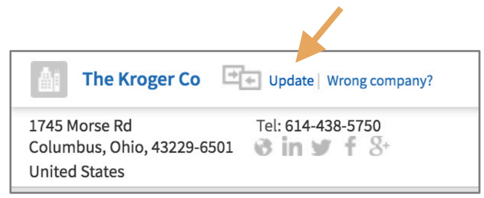
Access Additional Insights with the QuickView Widget

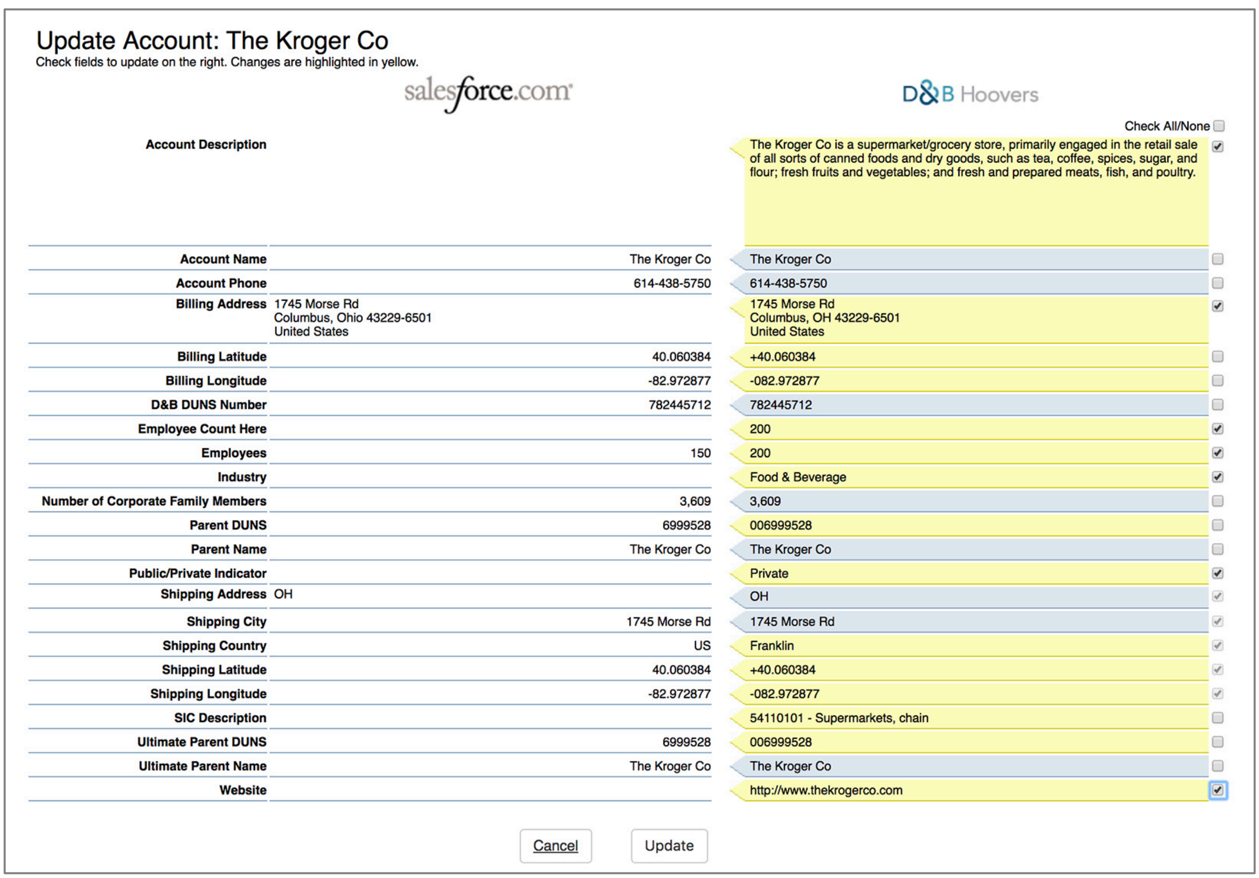
Our QuickView Widget is added to your record once you've matched it to an account in D&B Hoovers. The QuickView provides easy access to company details, contacts, and trigger alerts. More details on the QuickView Widget can be found later in this chapter.

How to Update a Record in Your CRM

Changes at an account or general data decay that occurs over time can impact the information on your records. You can easily check that you have the most current information and update as needed by leveraging the QuickView Profile.

1. Click *Update* next to the company name on the QuickView Profile.
2. A new screen called the "Stare and Compare" will open. The data that is currently on your record displays on the left and the data available in D&B Hoovers displays on the right side of the screen. A field is highlighted in yellow when the data in D&B Hoovers differs from the data on your record.
3. Check the box next to the fields you wish to update. Note, fields that have been protected by your CRM administrator cannot be overwritten. If a field is protected or required by your CRM rules, the checkbox will be greyed out. You will not be able to select or deselect it.
4. Click *Update* when done.





Update Account: The Kroger Co

Check fields to update on the right. Changes are highlighted in yellow.

	salesforce.com	D&B Hoovers
		Check All/None
Account Description		The Kroger Co is a supermarket/grocery store, primarily engaged in the retail sale of all sorts of canned foods and dry goods, such as tea, coffee, spices, sugar, and flour; fresh fruits and vegetables; and fresh and prepared meats, fish, and poultry.
Account Name	The Kroger Co	The Kroger Co
Account Phone	614-438-5750	614-438-5750
Billing Address	1745 Morse Rd Columbus, Ohio 43229-6501 United States	1745 Morse Rd Columbus, OH 43229-6501 United States
Billing Latitude	40.060384	+40.060384
Billing Longitude	-82.972877	-082.972877
D&B DUNS Number	782445712	782445712
Employee Count Here		200
Employees	150	200
Industry		Food & Beverage
Number of Corporate Family Members	3,609	3,609
Parent DUNS	6999528	006999528
Parent Name	The Kroger Co	The Kroger Co
Public/Private Indicator		Private
Shipping Address	OH	OH
Shipping City	1745 Morse Rd	1745 Morse Rd
Shipping Country	US	Franklin
Shipping Latitude	40.060384	+40.060384
Shipping Longitude	-82.972877	-082.972877
SIC Description		54110101 - Supermarkets, chain
Ultimate Parent DUNS	6999528	006999528
Ultimate Parent Name	The Kroger Co	The Kroger Co
Website		http://www.thekrogerco.com

Cancel Update

Access D&B Hoovers Information on your CRM Record with the QuickView Profile Widget

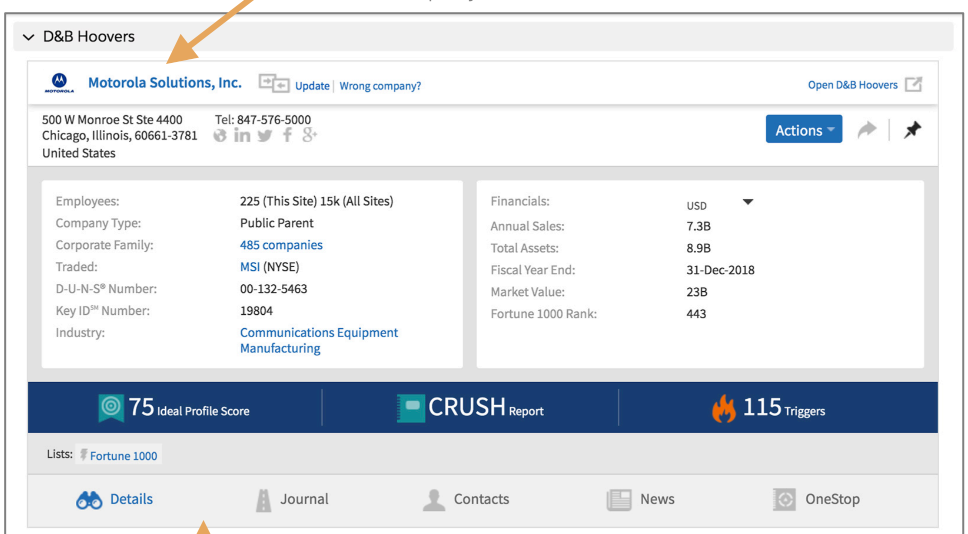
When you send a record to your CRM from D&B Hoovers or when the record has been matched and populated with D&B data, our QuickView Profile Widget will appear on account, contact, and lead records associated with that company.

The QuickView Profile includes:

- Company details such as: address information, social media links, and firmographics
- A journal of trigger events that can be viewed as a list or plotted on a timeline
- Access to all available contacts for this company
- News articles
- The ability to create a OneStop Report directly from the record

Access Company Details via the QuickView Profile Widget

Access the Company Profile
Click the company name to open the Company Profile for this company.



Details Screen
The details screen provides firmographic information for the business such as number of employees, size, industry, plus revenue figures and the number of companies in the Corporate Family.

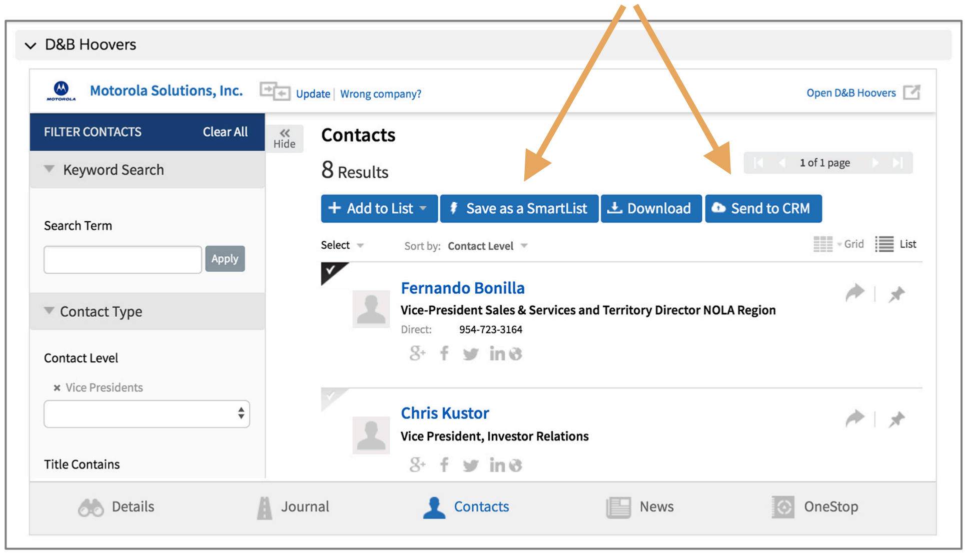
View Triggers, Contacts, News, or Create a OneStop Report
Click any of the menu items at the bottom of the widget to access additional content. The Journal option will display a timeline of trigger alerts. You can also create a OneStop Report, a packaged PDF of reports from this company's profile, without leaving the CRM record.

Find Contacts via the QuickView Profile Widget

The QuickView Profile Widget provides access to all the contacts D&B Hoovers has for this company. Click *Contacts* at the bottom of the widget to view a complete list. Filter options make it easy to focus by titles or departments, and you can save lists or send contacts to your CRM.

Save Lists or Send to CRM
Leverage the blue buttons to save a list of contacts, download, or send to CRM to associate these contact with your CRM record.

Contact Filters
Apply contact filters to easily focus on specific titles or departments.



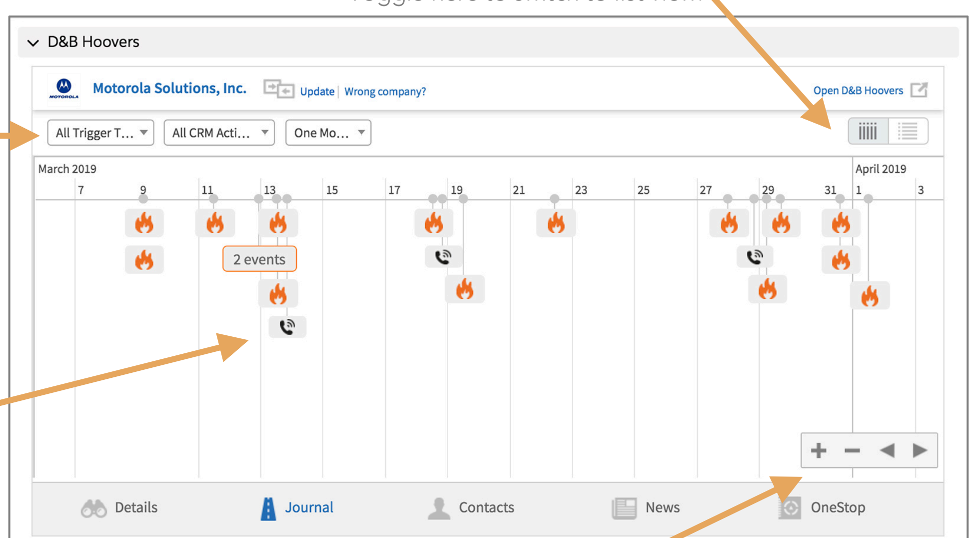
View a Timeline of Events on QuickView Profile Widget

The Journal tab provides a look at trigger alerts for this company.

View as a List or Timeline
Toggle here to switch to list view.

Filter View
Filter by trigger type, CRM activities, or time period.

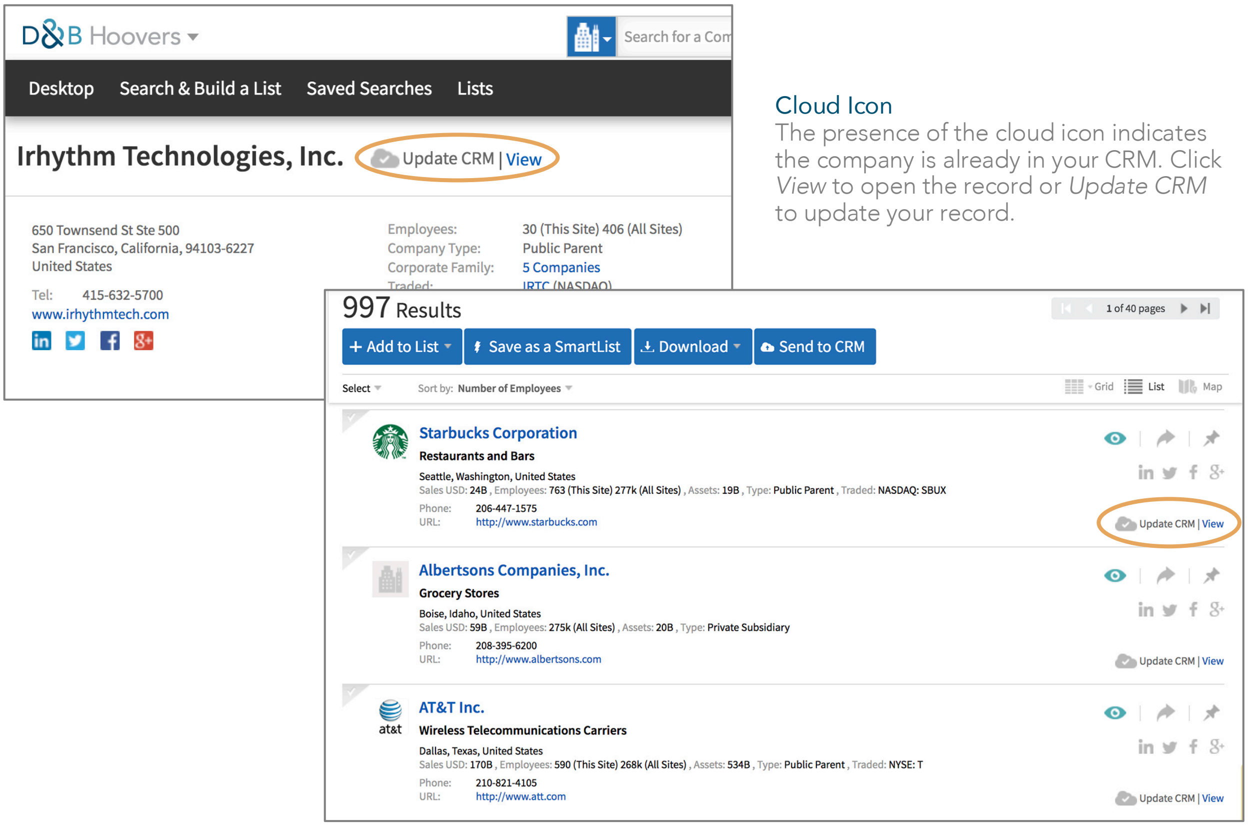
Connect CRM Activities to Company Events
Timeline view displays trigger alerts for this account, as well as CRM events like phone calls and emails. This information helps you see when action is taken in relation to a trigger alert.



Navigation Buttons
Zoom in or out with the + and – symbols. Click the left or right arrow to go backwards or forwards on the timeline.

Identifying Records That Have Been Sent to Your CRM

When a company or contact has been sent to your CRM, you will see a cloud symbol next to the name on lists and search results. You will also see this symbol at the top of a profile. You can click *View* to open the record in your CRM or click *Update* to update the information.



Cloud Icon

The presence of the cloud icon indicates the company is already in your CRM. Click *View* to open the record or *Update CRM* to update your record.

Salesforce CRM Watchlist

If you have a list of companies you want to keep an eye on, such as your assigned accounts or prospects you are pursuing, watchlists give you the ability to bring your own data into D&B Hoovers. At this time, the watchlist functionality is only available for Salesforce users.

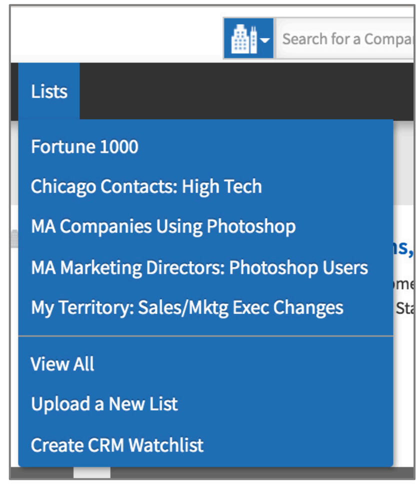
Watchlists can be used to:

- Access D&B Hoovers data and content for your accounts
- Exclude existing accounts from prospecting lists
- Build a list of triggers at your accounts

Watchlists can contain up to 2,000 records.

How to Create a Watchlist

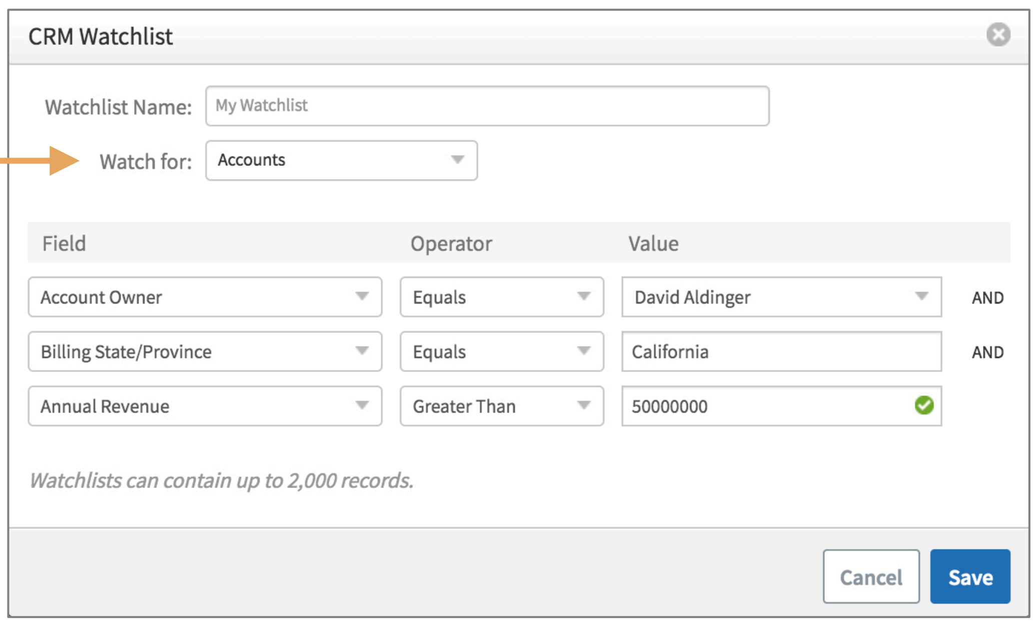
1. Select *Create CRM Watchlist* on the Lists menu.
2. Enter a name for your list in the Watchlist Name field.
3. Select the types of records you want to include in your list from the drop down list next to "Watch for". Choose accounts, leads, or opportunities.
4. Next, you will select the Salesforce fields you want to include in your list, such as Account Owner.
5. Choose the appropriate operator, such as equals or greater than to connect your selected fields with a value.
6. Select or enter the value that should apply to the field(s) you've selected.
7. Click *Save* to create your list.
8. Once your watchlist is populated it can be accessed via the Lists page.
9. Watchlists can be updated by clicking the *Repopulate* link at the top of the list or click *Modify Criteria* to change the fields associated with the list.



Create CRM Watchlist
Click the *Lists* menu and select *Create CRM Watchlist* to get started.

A CLOSER LOOK AT THE WATCHLIST CONFIGURATOR

Watch for
Select the types of records you want to include in your list. Choose from accounts, leads, or opportunities.

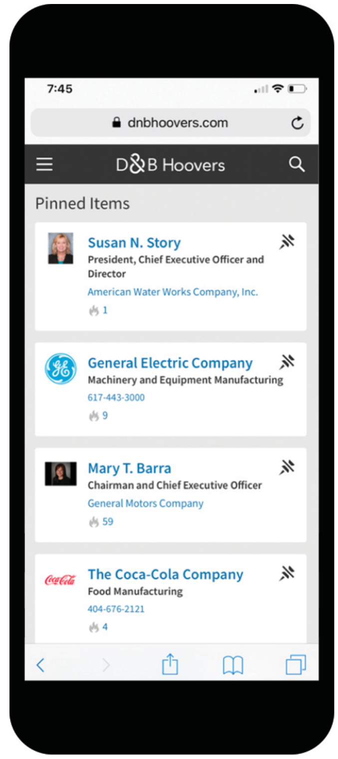


Quick Tip: Entering Numbers
Don't enter commas, decimal points, or currency symbols with figures. A green check mark will appear if the number is formatted correctly. In this example, we are looking at companies with annual revenue greater than $50M but enter it as 50000000.

Mobile Experience

USE D&B HOOVERS ON THE GO

The D&B Hoovers Mobile Experience offers a lightweight version of D&B Hooves that focuses on providing access to the information that is most valuable for a user who is on the road or accessing the product on a mobile device.



D&B Hoovers Desktop
Easily access pinned items from your desktop on your mobile device.

How to Access the Mobile Version of D&B Hoovers

The mobile version can be accessed using the following URL: https://m.dnbhoovers.com.

Alternatively, if you enter our standard URL, https://app.dnbhoovers.com, on a mobile device you will be automatically redirected to the D&B Hoovers mobile experience.

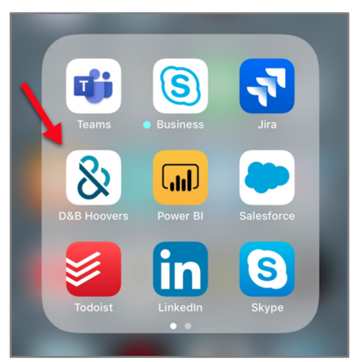
D&B Hoovers customers who have the Salesforce connector can access a mobile environment through Salesforce1.

Features Available in the Mobile Experience

- Global Search Bar
- Company Profile
- Nearby Opportunities (geo-spatial search)
- Pinned Items
- SmartLists & Lists
- Saved Searches
- Notifications

How to Add the D&B Hoovers Icon to Your Mobile Device's Home Screen

iPhone or iPad: Launch the Safari browser on Apple's iOS and navigate to https://m.dnbhoovers.com. Tap the Share button on the browser's toolbar — that's the rectangle with an arrow pointing upward. It's on the bar at the top of the screen on an iPad, and on the bar at the bottom of the screen on an iPhone. Tap the *Add to Home Screen* icon in the Share menu.



Android: Launch Chrome for Android and navigate to https://m.dnbhoovers.com. Tap the menu button and tap *Add to Home Screen*. You'll be able to enter a name for the shortcut and then Chrome will add it to your home screen.

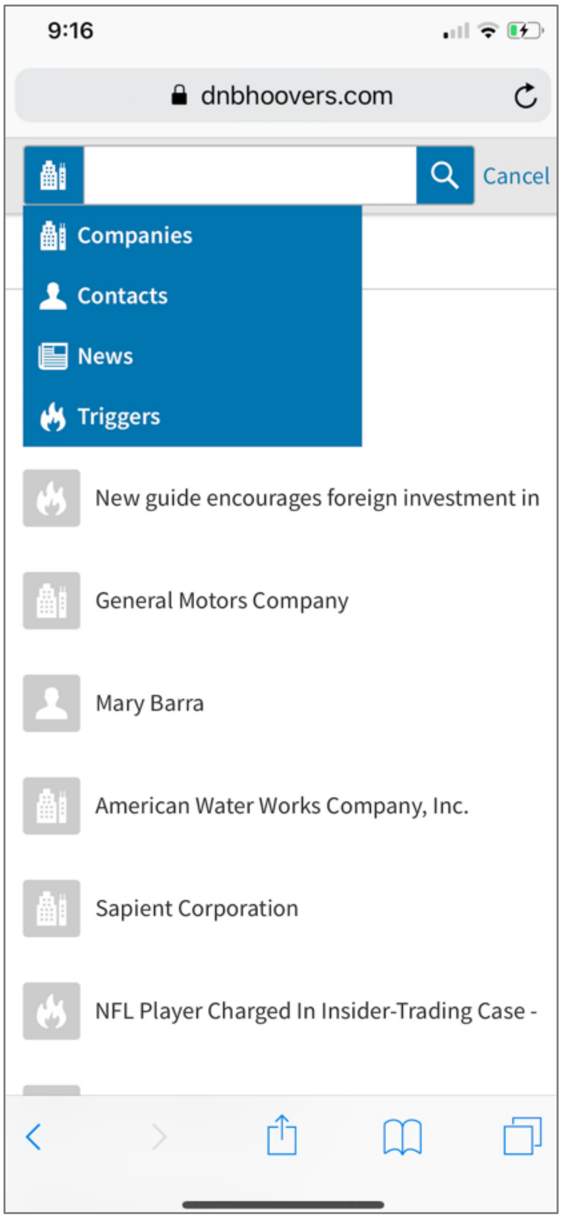
A CLOSER LOOK AT THE D&B HOOVERS MOBILE EXPERIENCE

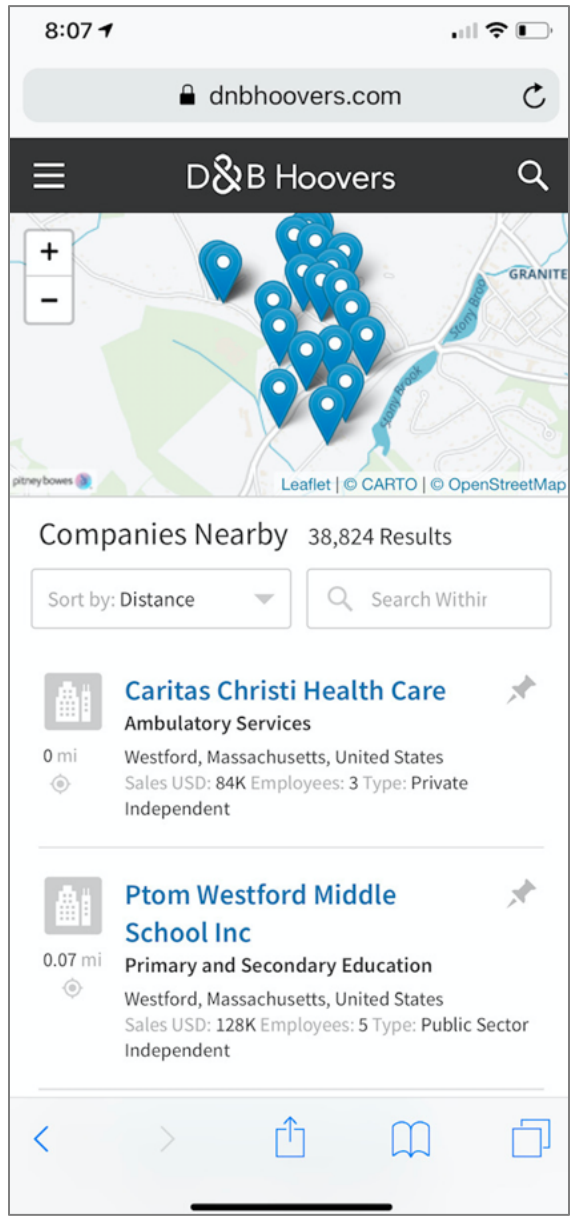
Search with the Global Search Bar

Search by company, contact, news, or triggers via the Global Search Bar. Your most recently viewed items are also listed here for quick access.

Search for Nearby Companies

The D&B Hoovers Mobile Experience introduces geo-spatial capabilities to identify companies within a set radius. Use this to prospect and discover nearby opportunities while on the road.

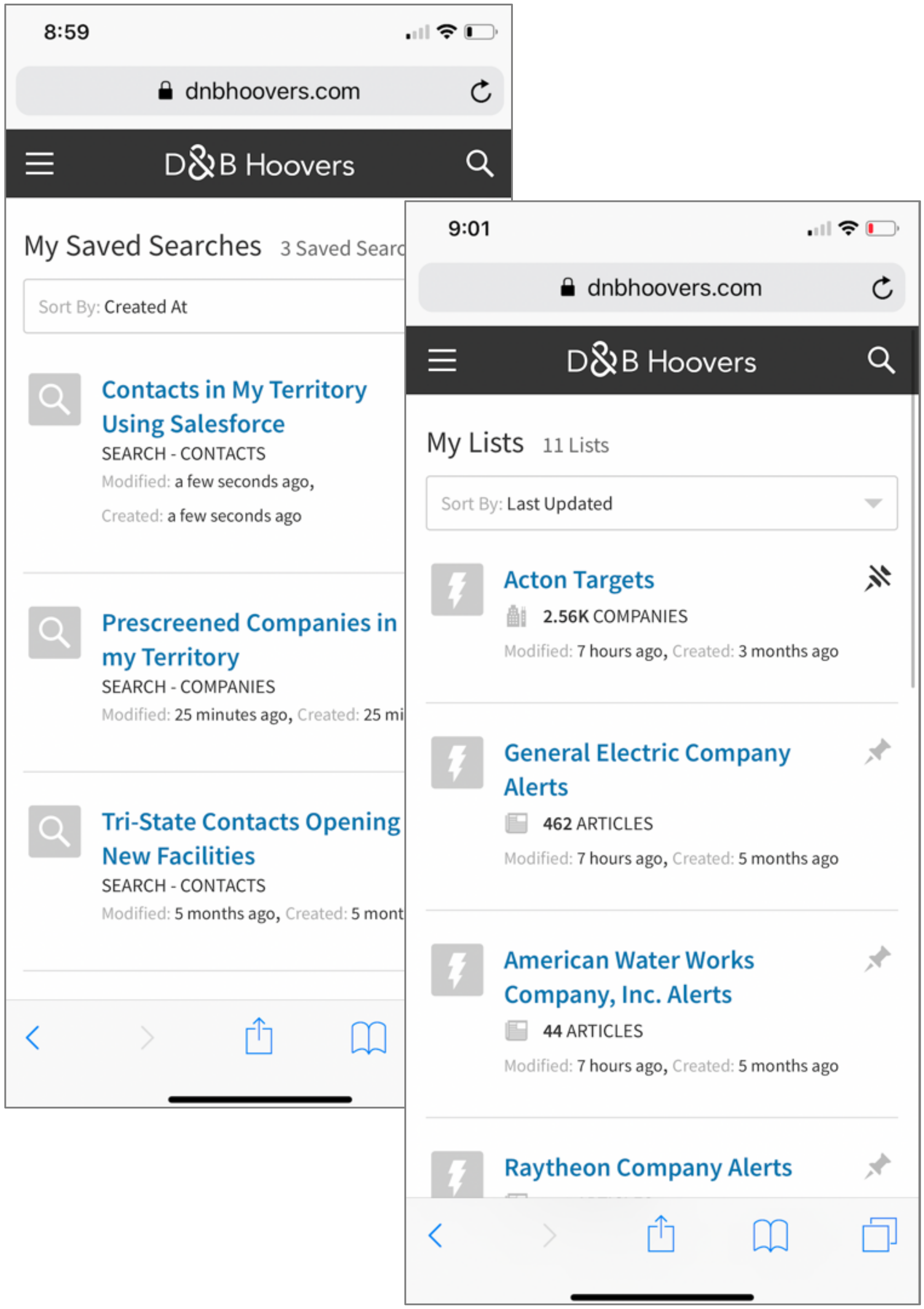




Access Saved Searches and Lists

Saved searches, lists, and SmartLists are available via the navigation menu. Open a list to access companies you are targeting or launch a saved search to look for new opportunities.

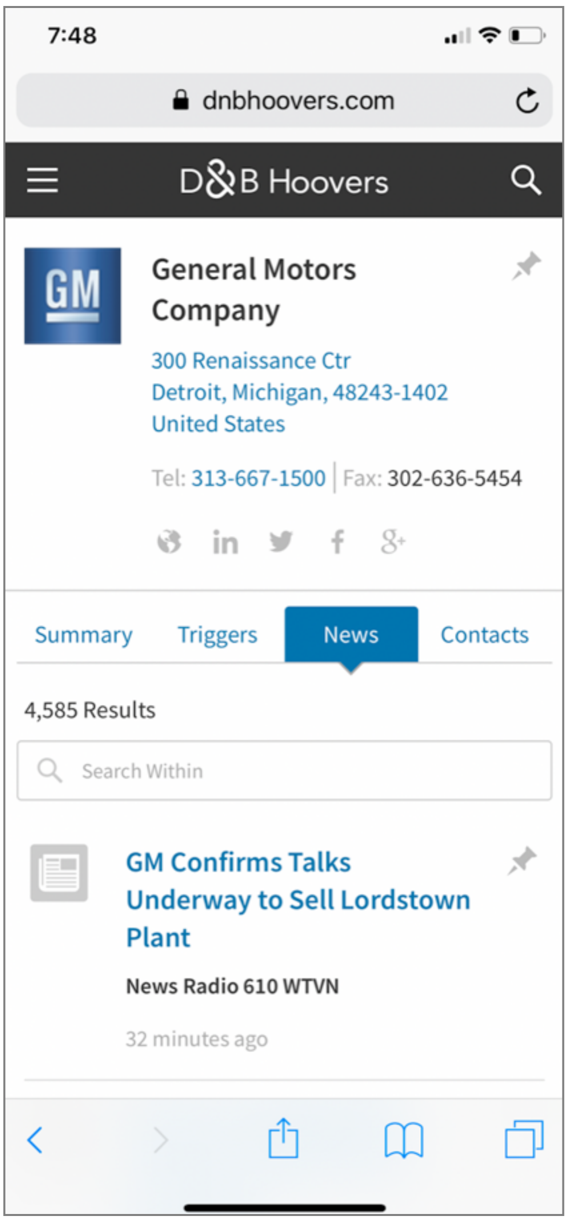
Navigation Menu
Click the menu icon in the top left corner of the screen to access the mobile menu.



Review Company Information

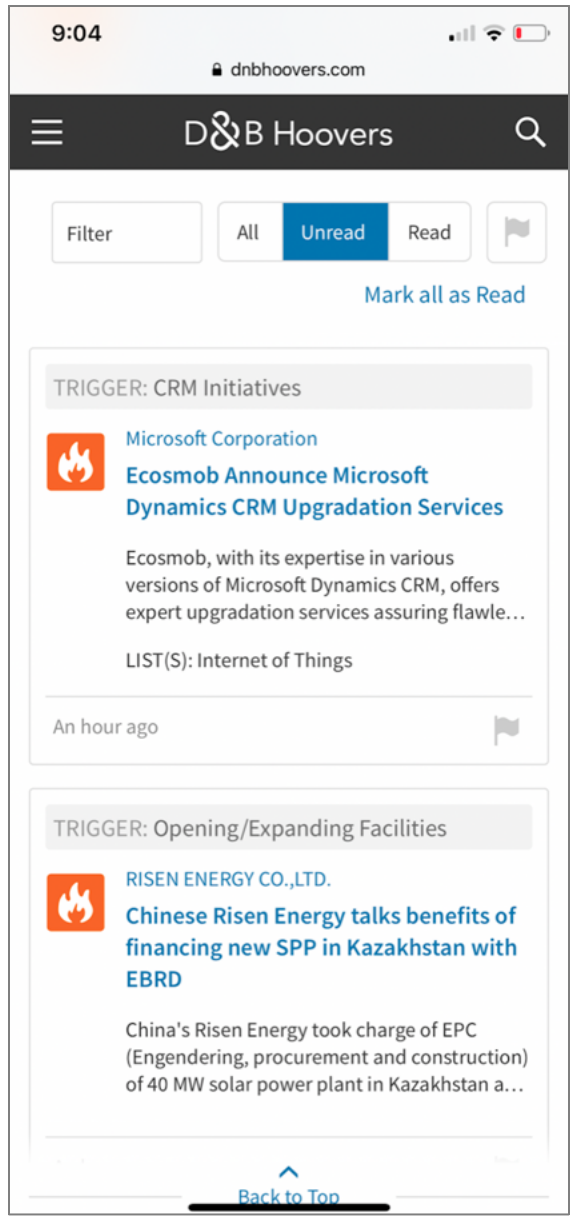
Open a streamlined Company Profile on your mobile device to view key company information. Company Profiles can be accessed by opening a pinned tile on your desktop or via a new search or saved list/SmartList.

The mobile version of a Company Profile includes: key firmographics, a business description, contacts, news, and trigger alerts.



Check Notifications

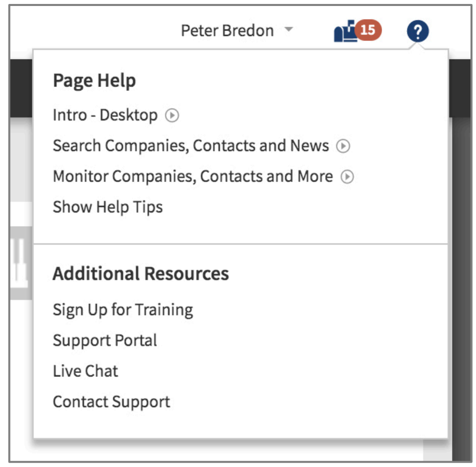
Access notifications (trigger alerts and SmartLists entries) on your phone and keep up with breaking news before you head into a meeting.



Support & Training Resources

WE ARE HERE TO ASSIST YOU

D&B Hoovers provides several options for support, including the in-product support portal, a dedicated support team, and our customer learning center.



Support & Training Menu
Provides quick access to the Support Portal, our dedicated Support Team, and training resources.

Support & Training Menu

Click the ? icon in the top right corner of the screen to access support and training resources in D&B Hoovers. From this menu you can watch tutorials, access the Support Portal, sign up for live or on demand training, contact the support team, and turn on help tips.

Page Help

The Page Help section of the Support & Training Menu includes links to training videos for core product functionality and in-product Help Tips. Click a video title to view the video without leaving D&B Hoovers. Click *Show Help Tips* and when available, a series of pop ups will guide you through the screen.

Sign Up for Training

Select *Sign Up for Training* to open the Customer Learning Center. Here you can view tutorials on demand or sign up for live training classes.

Support Portal

Access user guides, tips and tricks, and information on the latest product enhancements by clicking the ? icon in the top right of the screen and then select *Support Portal* from the Support & Training Menu.

Live Chat

Select *Live Chat* on the Support & Training Menu to message the Support Team. Live Chat is available during the same regional business hours outlined for the Support Team below.

Contact Support

Select *Contact Support* to view contact information and hours for our dedicated Support Team. Please refer to the following page for contact details for regional support.

Dun & Bradstreet Regional Customer Support Teams

Customer Support US
Support hours: Monday – Friday
9:30 am – 6:00 pm EST/EDT

Submit Support Request
https://support.dnb.com/

Talk to us: 800-486-8666

Customer Support Canada
Support hours: Monday – Friday
9:30 am – 6:00 pm EST/EDT

Submit Support Request
https://support.dnb.com/

Talk to us: 800-463-6362

Customer Support UK/Ireland
Support Hours: Monday – Friday
8:30 am – 5:30 pm GMT

Email (UK & Europe):
ukcs@dnb.com

Talk to us: UK +44 (0)845 145 1700

Customer Support Asia
Support hours: Monday – Friday
5:30 am – 1:30 pm IST

Submit Support Request
https://support.dnb.com/

Talk to us: +91 124 493 4709

Customer Support Europe
Support hours and contact details vary depending on location. Please visit https://www.dnb.co.uk/choose-your-country.html to contact your local customer services team.