

DNBi Product Tours

Sales & Marketing - Tour

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1. DNBi Overview

DNBi is an interactive, customizable Web application that provides you with the most complete and up-to-date DUNSRight information D&B has available, comprehensive monitoring, and portfolio analysis, all for one set price.

DNBi delivers:

- **The Power of insight**

DNBi empowers you to make more informed, efficient, and insightful credit decisions by providing online access to the **most complete and up-to-date information we have available on the more than 100 million companies in the D&B global database**. This information is presented in an easy-to-navigate, customizable Web-based format that makes your work life easier.

- **The Freedom of one set price**

View all the business information you need- **when you want and how you want**- for one set price.

- **The Confidence of DUNSRight-driven results**

Have the confidence that all the insight you gain and every decision you make using DNBi is backed by **D&B's DUNSRight Quality Process**. With D&B, you know you are using the most accurate, timely, and Complete information available.

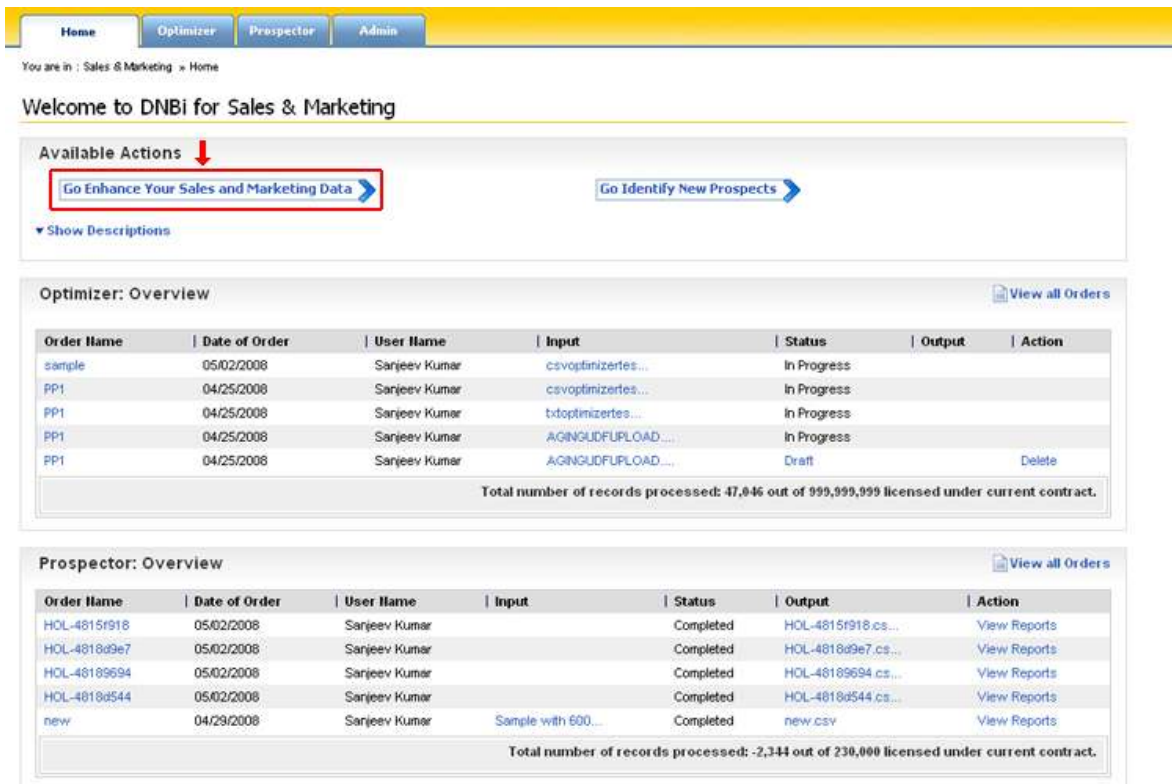
2. Home

The home page provides an at a glance overview of the Optimizer and Prospector Modules. Home will display all the Optimizer and Prospector Orders you've created. From this screen you can easily see the status of each file, download the input and the output files, and view your reports.

You can select either the Optimizer or Prospector tab for the full list of orders created in each module.

By clicking Go Enhance your Sales & Marketing data the user can enter the Optimizer module.

By clicking Go Identify New Prospects the user can enter the Prospector module.



Home Optimizer Prospector Admin

You are in : Sales & Marketing » Home

Welcome to DNBI for Sales & Marketing

Available Actions ↓

[Go Enhance Your Sales and Marketing Data](#) [Go Identify New Prospects](#)

▼ Show Descriptions

Optimizer: Overview [View all Orders](#)

Order Name	Date of Order	User Name	Input	Status	Output	Action
sample	05/02/2008	Sanjeev Kumar	csvoptimizertes...	In Progress		
PP1	04/25/2008	Sanjeev Kumar	csvoptimizertes...	In Progress		
PP1	04/25/2008	Sanjeev Kumar	txtoptimizertes...	In Progress		
PP1	04/25/2008	Sanjeev Kumar	AGINGUDFUPLOAD...	In Progress		
PP1	04/25/2008	Sanjeev Kumar	AGINGUDFUPLOAD...	Draft		Delete

Total number of records processed: 47,046 out of 999,999,999 licensed under current contract.

Prospector: Overview [View all Orders](#)

Order Name	Date of Order	User Name	Input	Status	Output	Action
HOL-4815f918	05/02/2008	Sanjeev Kumar		Completed	HOL-4815f918.cs...	View Reports
HOL-4818a9e7	05/02/2008	Sanjeev Kumar		Completed	HOL-4818a9e7.cs...	View Reports
HOL-48189694	05/02/2008	Sanjeev Kumar		Completed	HOL-48189694.cs...	View Reports
HOL-4818d544	05/02/2008	Sanjeev Kumar		Completed	HOL-4818d544.cs...	View Reports
new	04/29/2008	Sanjeev Kumar	Sample with 600...	Completed	new.csv	View Reports

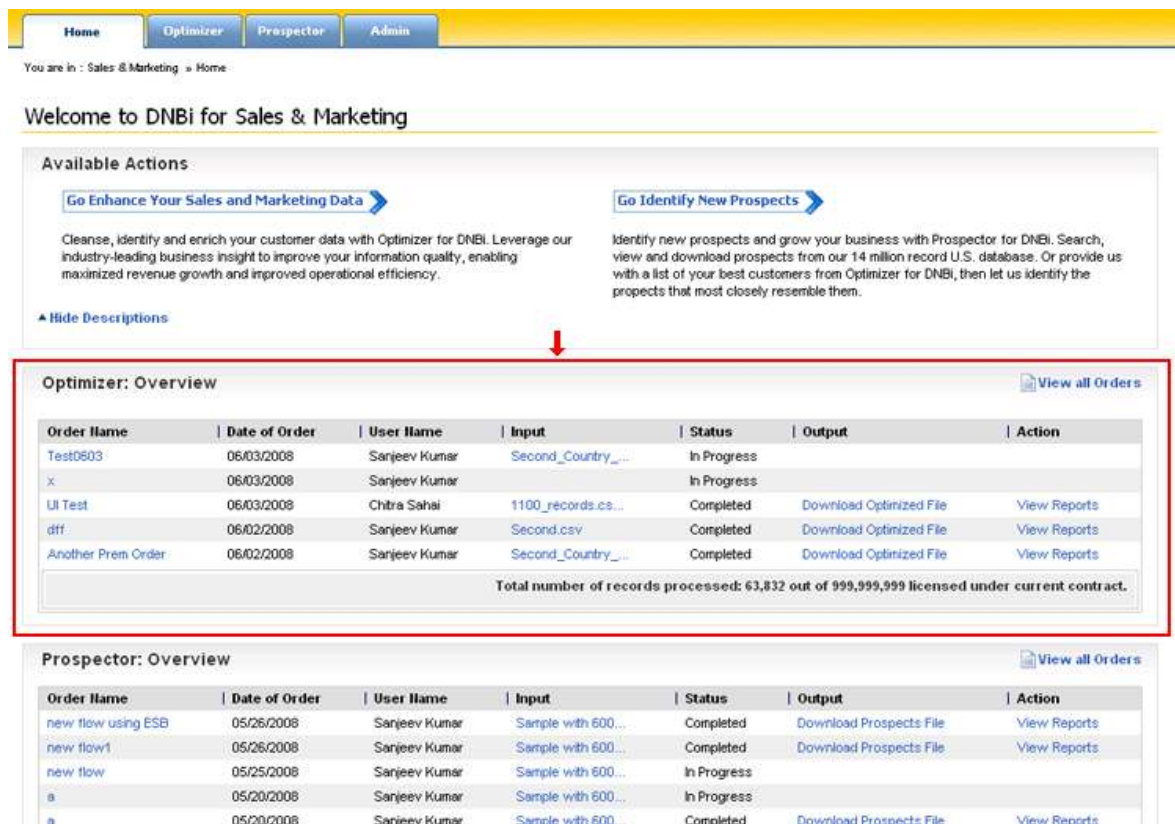
Total number of records processed: -2,344 out of 230,000 licensed under current contract.

Figure 1

3. Optimizer Overview

3.1 Overview

Optimizer is a Web application that provides you with the most complete and up-to-date DUNSRight™ information available on your sales and marketing files. Optimizer improves the quality of your customer and prospect information by cleansing it, matching it to D&B's commercial database, and enhancing it with D&B's quality DUNSRight information. Each order that you submit will cleanse and enhance your file as well as provide you with analytical reports that provide useful insight about your file for planning and analysis.



Home Optimizer Prospector Admin

You are in : Sales & Marketing » Home

Welcome to DNBI for Sales & Marketing

Available Actions

[Go Enhance Your Sales and Marketing Data](#) [Go Identify New Prospects](#)

Cleanse, identify and enrich your customer data with Optimizer for DNBI. Leverage our industry-leading business insight to improve your information quality, enabling maximized revenue growth and improved operational efficiency.

Identify new prospects and grow your business with Prospector for DNBI. Search, view and download prospects from our 14 million record U.S. database. Or provide us with a list of your best customers from Optimizer for DNBI, then let us identify the prospects that most closely resemble them.

▲ Hide Descriptions

Optimizer: Overview [View all Orders](#)

Order Name	Date of Order	User Name	Input	Status	Output	Action
Test0503	06/03/2008	Sanjeev Kumar	Second_Country_...	In Progress		
x	06/03/2008	Sanjeev Kumar		In Progress		
UI Test	06/03/2008	Chitra Sahai	1100_records.cs...	Completed	Download Optimized File	View Reports
dff	06/02/2008	Sanjeev Kumar	Second.csv	Completed	Download Optimized File	View Reports
Another Prem Order	06/02/2008	Sanjeev Kumar	Second_Country_...	Completed	Download Optimized File	View Reports

Total number of records processed: 63,832 out of 999,999,999 licensed under current contract.

Prospector: Overview [View all Orders](#)

Order Name	Date of Order	User Name	Input	Status	Output	Action
new flow using ESB	05/26/2008	Sanjeev Kumar	Sample with 600...	Completed	Download Prospects File	View Reports
new flow1	05/26/2008	Sanjeev Kumar	Sample with 600...	Completed	Download Prospects File	View Reports
new flow	05/25/2008	Sanjeev Kumar	Sample with 600...	In Progress		
a	05/20/2008	Sanjeev Kumar	Sample with 600...	In Progress		
a	05/20/2008	Sanjeev Kumar	Sample with 600...	Completed	Download Prospects File	View Reports

Figure 2

3.2 Optimizer - My Orders

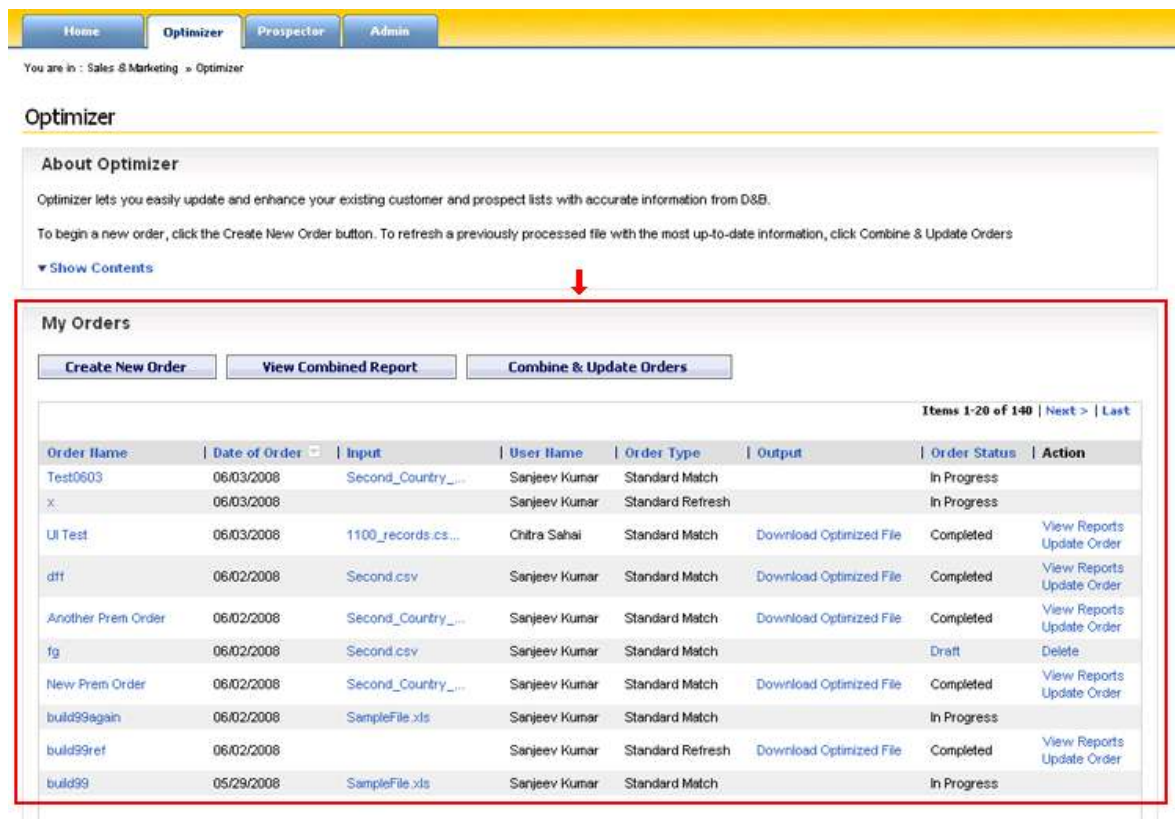
The My Orders page displays order name, date of order, user name, order type, input file name and order status, as well as the link to download an output file and the link to view reports. You can view the status of your order on both the DNBI Sales & Marketing home page in the Optimizer: Overview table, and also on the Optimizer home page in the My Orders table. These tables provide an overview of all the orders you have created over the past 12 months and their current status. Statuses include:

Draft – An order you have begun and saved for later. Click on the “Draft” link to finish creating the order and submit it for processing.

In Progress – An order you have submitted that is being processed.

Completed Order – A completed order, click the “Download Enhanced File” link to access the output file.

View Reports – A completed order, click the “View Reports” link to access the analytic reports that accompany your file.



You are in : Sales & Marketing » Optimizer

Optimizer

About Optimizer

Optimizer lets you easily update and enhance your existing customer and prospect lists with accurate information from D&B.

To begin a new order, click the Create New Order button. To refresh a previously processed file with the most up-to-date information, click Combine & Update Orders

[▼ Show Contents](#)

My Orders

[Create New Order](#) [View Combined Report](#) [Combine & Update Orders](#)

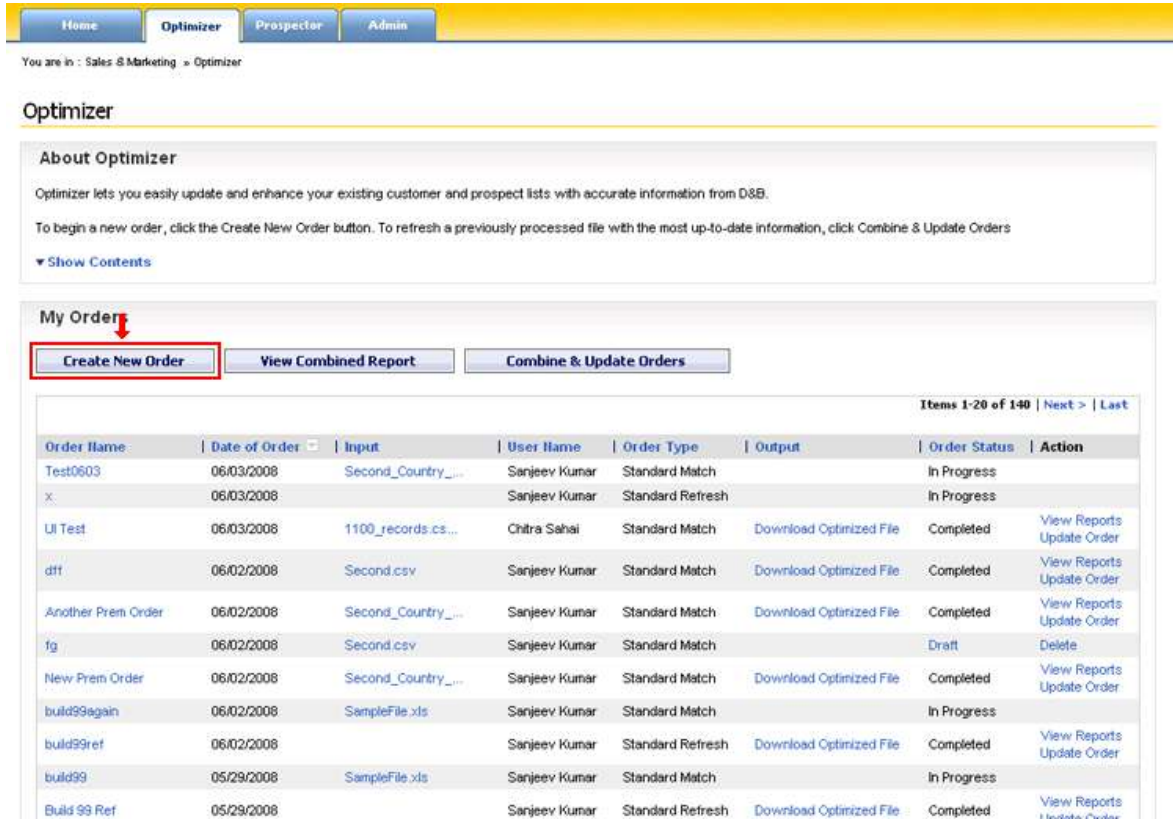
Items 1-20 of 140 | [Next >](#) | [Last](#)

Order Name	Date of Order	Input	User Name	Order Type	Output	Order Status	Action
Test0603	06/03/2008	Second_Country_...	Sanjeev Kumar	Standard Match		In Progress	
x	06/03/2008		Sanjeev Kumar	Standard Refresh		In Progress	
UI Test	06/03/2008	1100_records.cs...	Chitra Sahai	Standard Match	Download Optimized File	Completed	View Reports Update Order
dff	06/02/2008	Second.csv	Sanjeev Kumar	Standard Match	Download Optimized File	Completed	View Reports Update Order
Another Prem Order	06/02/2008	Second_Country_...	Sanjeev Kumar	Standard Match	Download Optimized File	Completed	View Reports Update Order
fg	06/02/2008	Second.csv	Sanjeev Kumar	Standard Match		Draft	Delete
New Prem Order	06/02/2008	Second_Country_...	Sanjeev Kumar	Standard Match	Download Optimized File	Completed	View Reports Update Order
build99again	06/02/2008	SampleFile.xls	Sanjeev Kumar	Standard Match		In Progress	
build99ref	06/02/2008		Sanjeev Kumar	Standard Refresh	Download Optimized File	Completed	View Reports Update Order
build99	05/29/2008	SampleFile.xls	Sanjeev Kumar	Standard Match		In Progress	

Figure 3

3.3 Create a New Order

You can create a new order by submitting your customer list. Optimizer will improve the quality of your customer and prospect information by cleansing it, matching it to D&B's commercial database, and enhancing it with D&B's quality DUNSRight information.



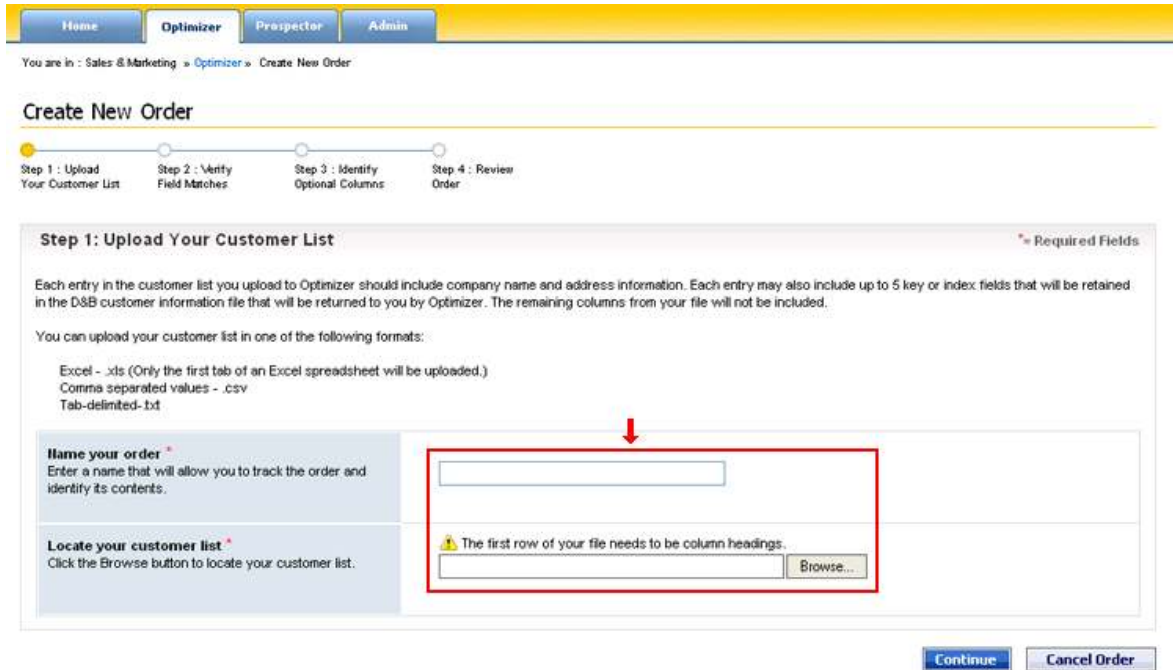
The screenshot shows the Optimizer web application interface. At the top, there is a navigation bar with buttons for Home, Optimizer, Prospector, and Admin. Below this, a breadcrumb trail indicates the user is in Sales & Marketing > Optimizer. The main heading is 'Optimizer'. Underneath, there is an 'About Optimizer' section with a brief description and a 'Show Contents' link. The 'My Order' section is highlighted with a red arrow and contains three buttons: 'Create New Order' (which is highlighted with a red box), 'View Combined Report', and 'Combine & Update Orders'. Below the buttons is a table listing orders with columns for Order Name, Date of Order, Input, User Name, Order Type, Output, Order Status, and Action.

Order Name	Date of Order	Input	User Name	Order Type	Output	Order Status	Action
Test0603	06/03/2008	Second_Country_...	Sanjeev Kumar	Standard Match		In Progress	
x	06/03/2008		Sanjeev Kumar	Standard Refresh		In Progress	
UI Test	06/03/2008	1100_records.cs...	Chitra Sahai	Standard Match	Download Optimized File	Completed	View Reports Update Order
df	06/02/2008	Second.csv	Sanjeev Kumar	Standard Match	Download Optimized File	Completed	View Reports Update Order
Another Prem Order	06/02/2008	Second_Country_...	Sanjeev Kumar	Standard Match	Download Optimized File	Completed	View Reports Update Order
fg	06/02/2008	Second.csv	Sanjeev Kumar	Standard Match		Draft	Delete
New Prem Order	06/02/2008	Second_Country_...	Sanjeev Kumar	Standard Match	Download Optimized File	Completed	View Reports Update Order
buld99again	06/02/2008	SampleFile.xls	Sanjeev Kumar	Standard Match		In Progress	
buld99ref	06/02/2008		Sanjeev Kumar	Standard Refresh	Download Optimized File	Completed	View Reports Update Order
buld99	05/29/2008	SampleFile.xls	Sanjeev Kumar	Standard Match		In Progress	
Build 99 Ref	05/29/2008		Sanjeev Kumar	Standard Refresh	Download Optimized File	Completed	View Reports Update Order

Figure 4

3.3.1 Upload Your Customer List

In the Name your order box, type in a name for your order so you can track it and identify its contents. In the Locate your customer list box, click Browse to locate the file you wish to upload on your computer. When you've selected your file, click Continue.



The screenshot shows the 'Create New Order' web application interface. At the top, there are navigation tabs for Home, Optimizer, Prospector, and Admin. Below the tabs, the breadcrumb path is 'You are in : Sales & Marketing » Optimizer » Create New Order'. The main heading is 'Create New Order', followed by a progress bar with four steps: Step 1: Upload Your Customer List (active), Step 2: Verify Field Matches, Step 3: Identify Optional Columns, and Step 4: Review Order.

The main content area is titled 'Step 1: Upload Your Customer List' and includes a 'Required Fields' indicator. It contains the following text:

Each entry in the customer list you upload to Optimizer should include company name and address information. Each entry may also include up to 5 key or index fields that will be retained in the D&B customer information file that will be returned to you by Optimizer. The remaining columns from your file will not be included.

You can upload your customer list in one of the following formats:

- Excel - .xls (Only the first tab of an Excel spreadsheet will be uploaded.)
- Comma separated values - .csv
- Tab-delimited - .txt

There are two required fields:

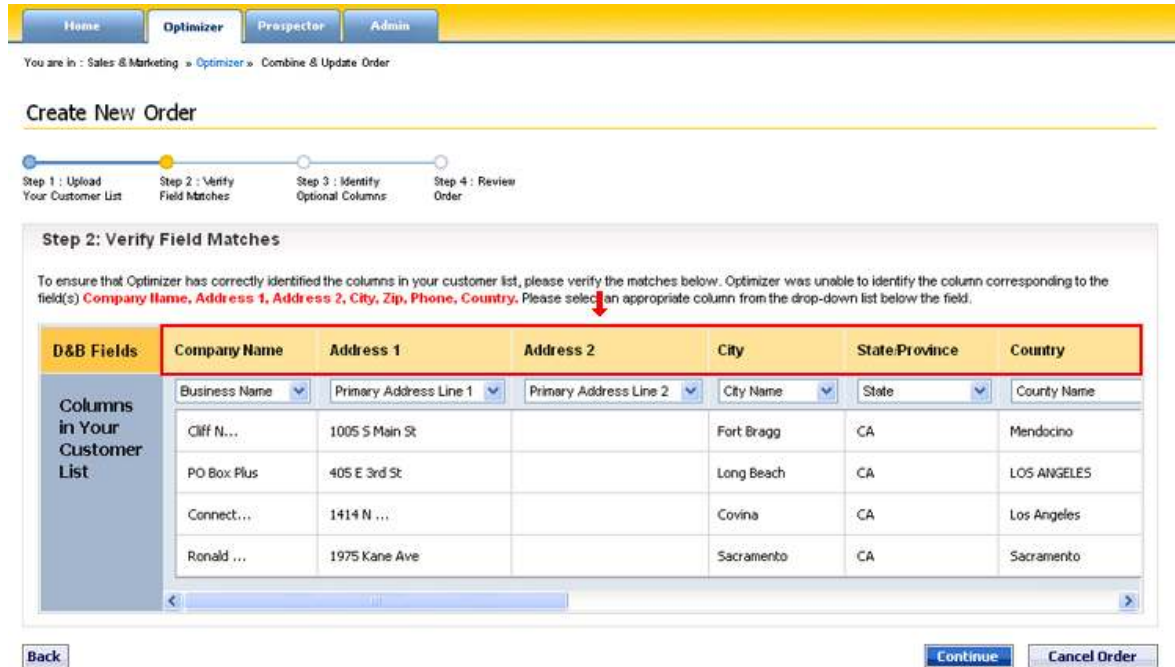
- Name your order ***: Enter a name that will allow you to track the order and identify its contents. This field is highlighted with a red box and a red arrow pointing to it.
- Locate your customer list ***: Click the Browse button to locate your customer list. This field is also highlighted with a red box and contains a warning icon and the text: 'The first row of your file needs to be column headings.' Below this text is a 'Browse...' button.

At the bottom right, there are two buttons: 'Continue' and 'Cancel Order'.

Figure 5

3.3.2 Verify Field Matches

On the **Verify Field Matches** screen, review each column to ensure Optimizer correctly identified its contents. If you wish to change a column to be used in the Optimizer process, use the drop-down menu to select the appropriate column name.



You are in : Sales & Marketing » Optimizer » Combine & Update Order

Create New Order

Step 1 : Upload Your Customer List Step 2 : Verify Field Matches Step 3 : Identify Optional Columns Step 4 : Review Order

Step 2: Verify Field Matches

To ensure that Optimizer has correctly identified the columns in your customer list, please verify the matches below. Optimizer was unable to identify the column corresponding to the field(s) **Company Name, Address 1, Address 2, City, Zip, Phone, Country**. Please select an appropriate column from the drop-down list below the field.

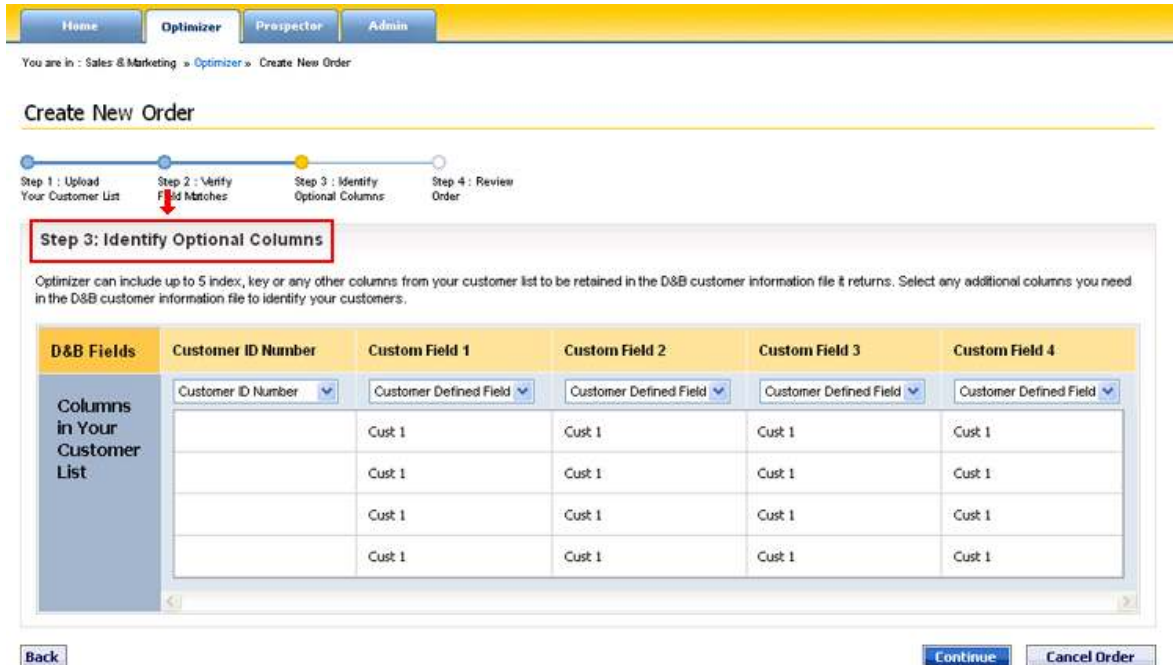
D&B Fields	Company Name	Address 1	Address 2	City	State/Province	Country
Columns in Your Customer List	Business Name	Primary Address Line 1	Primary Address Line 2	City Name	State	County Name
	Cliff N...	1005 S Main St		Fort Bragg	CA	Mendocino
	PO Box Plus	405 E 3rd St		Long Beach	CA	LOS ANGELES
	Connect...	1414 N ...		Covina	CA	Los Angeles
	Ronald ...	1975 Kane Ave		Sacramento	CA	Sacramento

Back Continue Cancel Order

Figure 6

3.3.3 Identify Optional Columns

Optimizer enables you to select five additional columns of data to retain in the D&B customer information file it returns. On the **Identify Optional Columns** screen, you are able to select a field heading from the drop-down list to retain the column. If you do not wish to retain additional fields, select 'do not use' from the drop downs.



You are in : Sales & Marketing » Optimizer » Create New Order

Create New Order

Step 1 : Upload Your Customer List Step 2 : Verify Field Matches Step 3 : Identify Optional Columns Step 4 : Review Order

Step 3: Identify Optional Columns

Optimizer can include up to 5 index, key or any other columns from your customer list to be retained in the D&B customer information file it returns. Select any additional columns you need in the D&B customer information file to identify your customers.

D&B Fields	Customer ID Number	Custom Field 1	Custom Field 2	Custom Field 3	Custom Field 4
Columns in Your Customer List	Customer ID Number	Customer Defined Field	Customer Defined Field	Customer Defined Field	Customer Defined Field
		Cust 1	Cust 1	Cust 1	Cust 1
		Cust 1	Cust 1	Cust 1	Cust 1
		Cust 1	Cust 1	Cust 1	Cust 1
		Cust 1	Cust 1	Cust 1	Cust 1

Back Continue Cancel Order

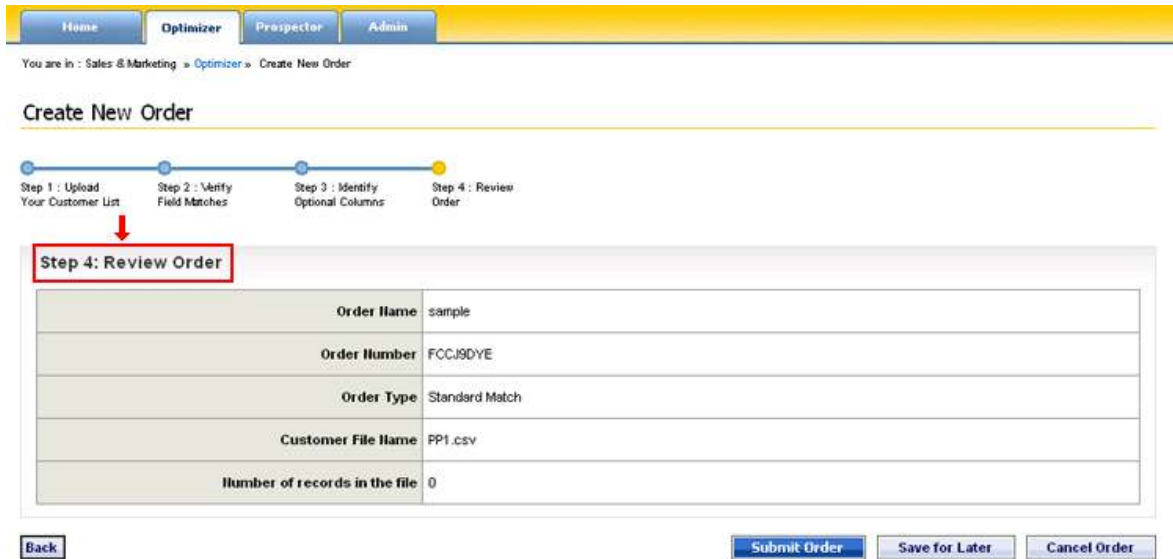
Figure 7

3.3.4 Review Order

On the Review Order screen, you have the opportunity to review your order specifications. If you are satisfied, click the Submit Order button.

Submit Order: Click Submit Order button to submit the order for processing.

You will be returned to the Optimizer home page, where you will see your new order in the My Orders table.



You are in : Sales & Marketing » Optimizer » Create New Order

Create New Order

Step 1 : Upload Your Customer List Step 2 : Verify Field Matches Step 3 : Identify Optional Columns **Step 4 : Review Order**

Order Name	sample
Order Number	FCCJ9DYE
Order Type	Standard Match
Customer File Name	PP1.csv
Number of records in the file	0

[Back](#) [Submit Order](#) [Save for Later](#) [Cancel Order](#)

Figure 8

3.4 Combine & Update Orders

Optimizer enables you to re-submit a previously processed order to refresh the data, without having to create a new order. Updating an existing order is included in your subscription.

Name the order you wish to submit.

Select the orders you wish to update & combine.

Click Submit Order button to submit the order for processing.

Home
Optimizer
Prospector
Admin

You are in : Sales & Marketing » Optimizer » Combine & Update Order

Combine & Update Order

Step 1 : Select Files

Step 2 : Review & Submit

* = Required Fields

Select the optimized file(s) below you want to update with most up-to-date information available. All selected file(s) will be combined into a single file with containing all updated records. You will be notified by email when your file is ready.

Name your order *

<input type="checkbox"/>	Order Name	Order Number	Date of Order	Order Type	Input	User Name
<input type="checkbox"/>	test15	FCCG93VQ	06/26/2008	Standard Refresh		Sanjeev Kumar
<input type="checkbox"/>	test12	FCCB93W8	06/26/2008	Standard Refresh		Sanjeev Kumar
<input checked="" type="checkbox"/>	Order Combining 103	FCCV93X4	06/26/2008	Standard Refresh		Sanjeev Kumar
<input checked="" type="checkbox"/>	Updating 103	FCCB93Q4	06/26/2008	Standard Refresh		Sanjeev Kumar
<input checked="" type="checkbox"/>	rverspr17340	FCCM93RV	06/26/2008	Standard Match	US_191_records+header_modified.xls	Sanjeev Kumar
<input type="checkbox"/>	Test 103	FCCT93AM	06/26/2008	Standard Match	Second_Country_Again.csv	Sanjeev Kumar
<input type="checkbox"/>	test	FCCT93J5	06/26/2008	Standard Refresh		Sanjeev Kumar
<input type="checkbox"/>	TestMeter	FCCB95TN	06/25/2008	Standard Match	Second_Country_Again.csv	Sanjeev Kumar
<input type="checkbox"/>	Professional	FCCD95RL	06/24/2008	Standard Match	dt20JuneRefresh_CRM_01.csv	Sanjeev Kumar
<input type="checkbox"/>	TestCountry	FCCG9YCD	06/23/2008	Standard Match	Second_Country_Again.csv	Chitra Sahai
<input type="checkbox"/>	Customer_08_Refresh	FCCY94MP	06/23/2008	Standard Refresh		Chitra Sahai
<input type="checkbox"/>	Customers_08	FCCD94NT	06/20/2008	Standard Match	Customers.xls	Chitra Sahai
<input type="checkbox"/>	MatchOrder.June20	FCCN9WGC	06/20/2008	Standard Match	Second_Country_Again.csv	Sanjeev Kumar

Figure 9

3.5 Download Enhanced Files

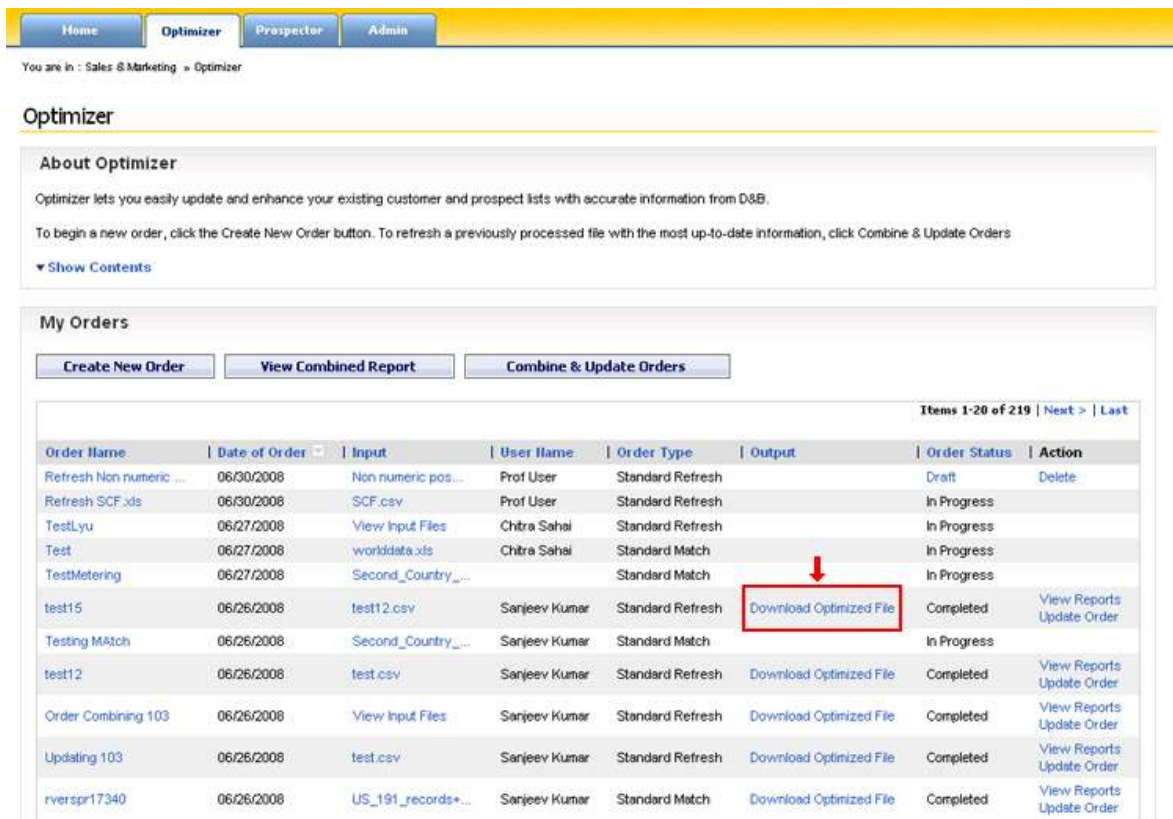
By clicking on the Download Enhanced File, you can specify your output settings for the output file and then download the file.

You can specify if you want to download the output file for Updating CRM, for Mailing List or Telemarketing. You can also select advanced options.

You can specify if you want a separate file for unmatched records or not.

You can select the format of the output file.

You can specify if you want a single or multiple output files.



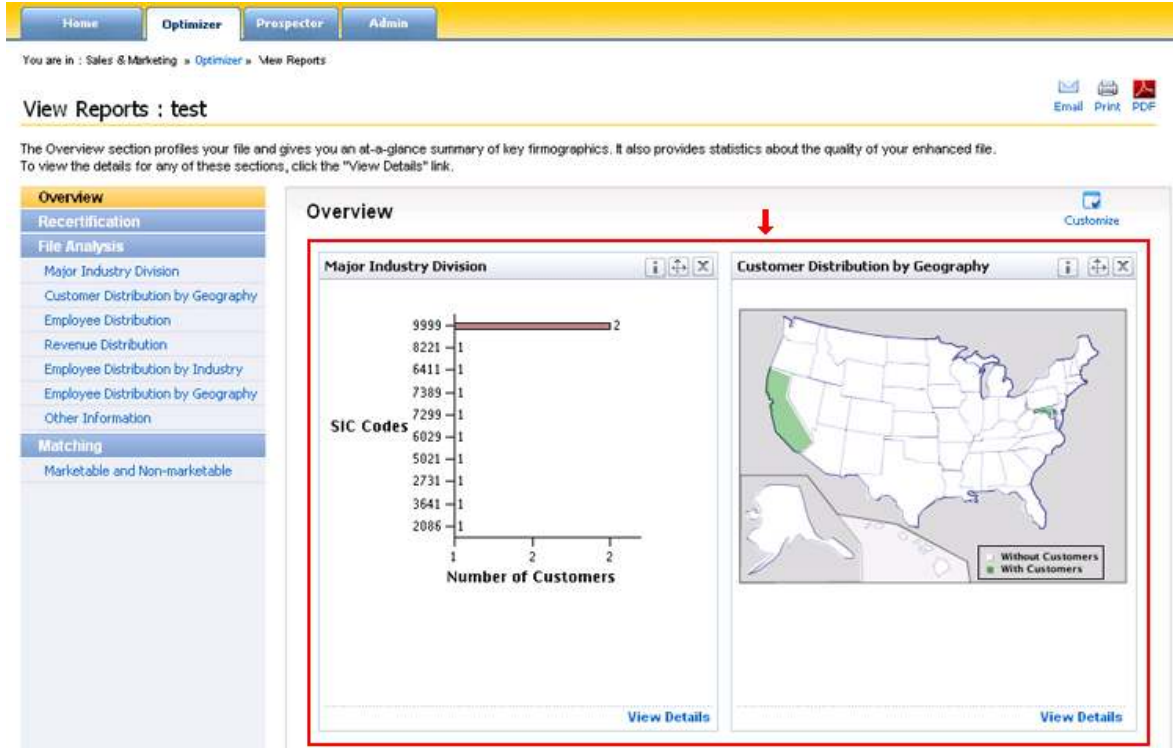
The screenshot shows the 'Optimizer' section of the D&B interface. It includes a navigation bar with 'Home', 'Optimizer', 'Prospector', and 'Admin'. Below the navigation bar, there is a breadcrumb trail 'You are in : Sales & Marketing » Optimizer'. The main content area is titled 'Optimizer' and contains an 'About Optimizer' section with a description and a 'Show Contents' link. Below this is a 'My Orders' section with three buttons: 'Create New Order', 'View Combined Report', and 'Combine & Update Orders'. A table of orders is displayed, with columns for Order Name, Date of Order, Input, User Name, Order Type, Output, Order Status, and Action. The table shows 21 items, with the first 20 visible. The 'test15' order is highlighted, and a red arrow points to the 'Download Optimized File' link in the Output column for that order.

Order Name	Date of Order	Input	User Name	Order Type	Output	Order Status	Action
Refresh Non numeric ...	06/30/2008	Non numeric pos...	Prof User	Standard Refresh		Draft	Delete
Refresh SCF.xls	06/30/2008	SCF.csv	Prof User	Standard Refresh		In Progress	
TestLyu	06/27/2008	View Input Files	Chitra Sahai	Standard Refresh		In Progress	
Test	06/27/2008	worlddata.xls	Chitra Sahai	Standard Match		In Progress	
TestMetering	06/27/2008	Second_Country_...		Standard Match		In Progress	
test15	06/26/2008	test12.csv	Sanjeev Kumar	Standard Refresh	Download Optimized File	Completed	View Reports Update Order
Testing MATCH	06/26/2008	Second_Country_...	Sanjeev Kumar	Standard Match		In Progress	
test12	06/26/2008	test.csv	Sanjeev Kumar	Standard Refresh	Download Optimized File	Completed	View Reports Update Order
Order Combining 103	06/26/2008	View Input Files	Sanjeev Kumar	Standard Refresh	Download Optimized File	Completed	View Reports Update Order
Updating 103	06/26/2008	test.csv	Sanjeev Kumar	Standard Refresh	Download Optimized File	Completed	View Reports Update Order
rverspr17340	06/26/2008	US_191_records+...	Sanjeev Kumar	Standard Match	Download Optimized File	Completed	View Reports Update Order

Figure 10

3.6 Optimizer Reports

These are the reports you receive when you enhance your customer file with the Optimizer module. It contains File Analysis/Profiling, Cleansing, and Matching reports based on your enhanced customer file.



The screenshot shows the 'View Reports : test' interface. The navigation bar includes 'Home', 'Optimizer', 'Prospector', and 'Admin'. The breadcrumb trail reads 'You are in : Sales & Marketing » Optimizer » View Reports'. The page title is 'View Reports : test'. The main content area is titled 'Overview' and contains a summary of key firmographics. A left-hand menu lists various report categories: Overview, Recertification, File Analysis, Major Industry Division, Customer Distribution by Geography, Employee Distribution, Revenue Distribution, Employee Distribution by Industry, Employee Distribution by Geography, Other Information, Matching, and Marketable and Non-marketable. The 'Overview' section is currently selected. The main content area displays two charts: 'Major Industry Division' and 'Customer Distribution by Geography'. The 'Major Industry Division' chart is a horizontal bar chart showing the number of customers for various SIC codes. The 'Customer Distribution by Geography' chart is a map of the United States showing the distribution of customers by state, with a legend indicating 'Without Customers' (light green) and 'With Customers' (dark green).

Major Industry Division

SIC Codes	Number of Customers
9999	2
8221	1
6411	1
7389	1
7299	1
6029	1
5021	1
2731	1
3641	1
2086	1

Customer Distribution by Geography

Map showing Customer Distribution by Geography. Legend: Without Customers (light green), With Customers (dark green).

Figure 11

3.7 View Combined Reports

You can combine the reports from up to six orders into a single report.

Select the orders you wish to combine.

Click view report to open the combined report.

Home
Optimizer
Prospector
Admin

You are in : Sales & Marketing » Optimizer

View Combined Reports

You can combine files using existing data or obtain new data. Obtaining new data will be processed as a new order in you order list.

	Order Name	Order Number	Date of Order	Order Type	Input	User Name
<input type="checkbox"/>	test	FCCT9DCX	06/08/2008	Standard Refresh		Chitra Sahai
<input type="checkbox"/>	After Del Logs	FCC9BF95	06/08/2008	Standard Match	Second_Country_Again.csv	Sanjeev Kumar
<input type="checkbox"/>	Order 100a Match	FCCMBFBB	06/07/2008	Standard Match	Second.csv	Sanjeev Kumar
<input type="checkbox"/>	test	FCC5BFPN	06/06/2008	Standard Refresh		Sanjeev Kumar
<input type="checkbox"/>	h2	FCCKBFE9	06/06/2008	Standard Refresh		Sanjeev Kumar
<input type="checkbox"/>	Order 100a Refresh	FCC9B9PP	06/05/2008	Standard Refresh		Cindy Berger
<input type="checkbox"/>	UI Test	FCCJB9KM	06/03/2008	Standard Match	1100_records.csv	Chitra Sahai
<input type="checkbox"/>	dff	FCCLTX4L	06/02/2008	Standard Match	Second.csv	Sanjeev Kumar
<input type="checkbox"/>	Another Prem Order	FCCQB4A	06/02/2008	Standard Match	Second_Country_Again.csv	Sanjeev Kumar
<input type="checkbox"/>	New Prem Order	FCC8BENL	06/02/2008	Standard Match	Second_Country_Again.csv	Sanjeev Kumar
<input type="checkbox"/>	build99ref	FCC4BP9J	06/02/2008	Standard Refresh		Sanjeev Kumar
<input type="checkbox"/>	Build 99 Ref	FCCNB8X	05/29/2008	Standard Refresh		Sanjeev Kumar
<input type="checkbox"/>	Test Order 98	FCCEBTV	05/23/2008	Standard Match	12records.xls	Sanjeev Kumar
<input type="checkbox"/>	sd	FCCAB6JN	05/22/2008	Standard Match	PREMIUM_COUNTRY_CSV.csv	Chitra Sahai
<input type="checkbox"/>	ref build 97	FCCXBWBB	05/08/2008	Standard Refresh		Sanjeev Kumar
<input type="checkbox"/>	test	FCCPBWE4	05/08/2008	Standard Match	ProfPros_matrix_POA.xls	Sanjeev Kumar
<input type="checkbox"/>	PP1	FCC6BW5C	05/08/2008	Standard Match	csvoptimizer.csv	Sanjeev Kumar

Figure 12

4. Prospector Overview

4.1 Overview

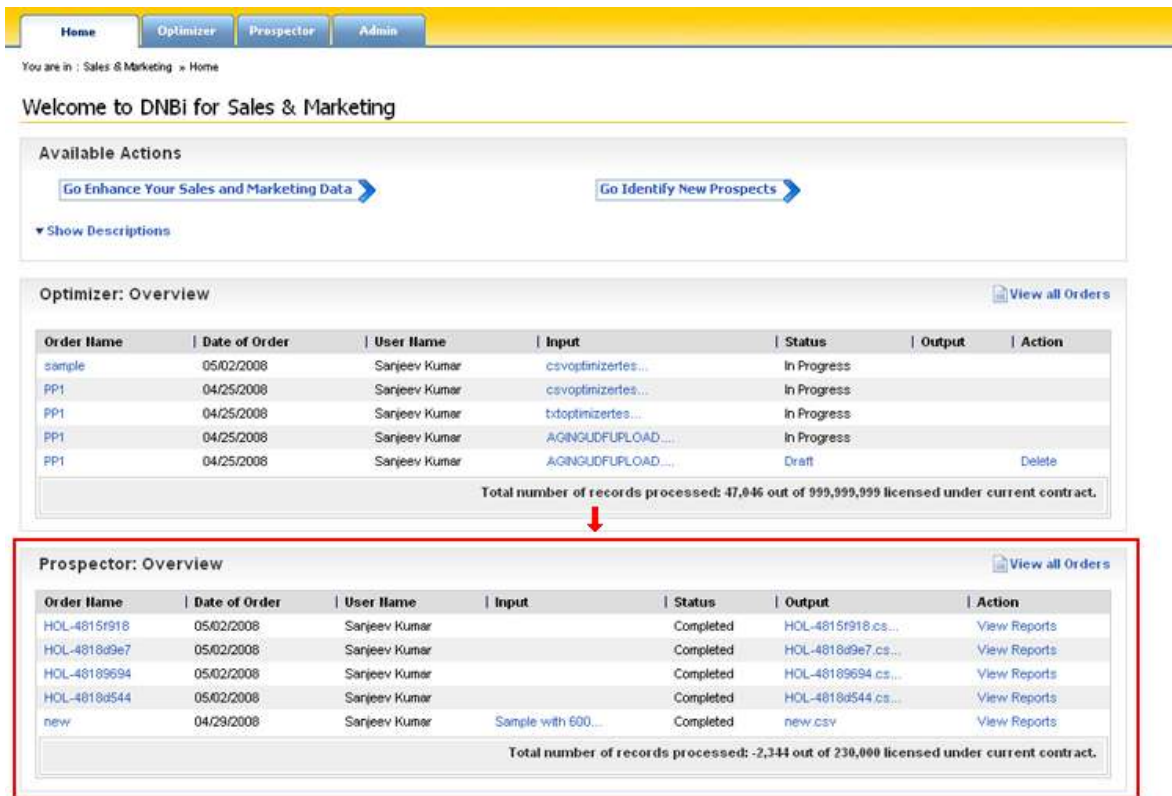
Prospector is an optional add-on service to Optimizer that enables you to more precisely target prospects to improve the return on your acquisition programs.

Prospector performs two critical functions to support your sales and marketing activities:

Search D&B's database of U.S. businesses to find those that meet your specific criteria. Download these business records to drive your sales and marketing initiatives.

Analyze your existing customers to develop profiles of your best customer segments. Use this insight to help develop the most effective strategies as well as to generate highly targeted lists to drive your sales and marketing initiatives.

In addition to these search and analysis capabilities, Prospector provides you with analytic reports that summarize and benchmark your customers to give you a deeper understanding of your customer base and your market penetration.



Home Optimizer Prospector Admin

You are in : Sales & Marketing > Home

Welcome to DNBI for Sales & Marketing

Available Actions

[Go Enhance Your Sales and Marketing Data](#) [Go Identify New Prospects](#)

▼ Show Descriptions

Optimizer: Overview [View all Orders](#)

Order Name	Date of Order	User Name	Input	Status	Output	Action
sample	05/02/2008	Sanjeev Kumar	csvoptimizeres...	In Progress		
PP1	04/25/2008	Sanjeev Kumar	csvoptimizeres...	In Progress		
PP1	04/25/2008	Sanjeev Kumar	txtoptimizeres...	In Progress		
PP1	04/25/2008	Sanjeev Kumar	AGINGDUFUPLOAD...	In Progress		
PP1	04/25/2008	Sanjeev Kumar	AGINGDUFUPLOAD...	Draft		Delete

Total number of records processed: 47,046 out of 999,999,999 licensed under current contract.

Prospector: Overview [View all Orders](#)

Order Name	Date of Order	User Name	Input	Status	Output	Action
HOL-4815f918	05/02/2008	Sanjeev Kumar		Completed	HOL-4815f918.cs...	View Reports
HOL-4818d9e7	05/02/2008	Sanjeev Kumar		Completed	HOL-4818d9e7.cs...	View Reports
HOL-48189694	05/02/2008	Sanjeev Kumar		Completed	HOL-48189694.cs...	View Reports
HOL-4818d544	05/02/2008	Sanjeev Kumar		Completed	HOL-4818d544.cs...	View Reports
new	04/29/2008	Sanjeev Kumar	Sample with 600...	Completed	new.csv	View Reports

Total number of records processed: -2,344 out of 230,000 licensed under current contract.

Figure 13

4.2 Prospector Orders

The My Orders page displays Order name, Product Service, Date of order creation, user name, the name of the input file, order status, the link to download output file, and link to view the reports. You can view the status of your order on both the DNB Sales & Marketing home page, in the Prospector: Overview table, and also on the Prospector home page in the My Orders table. These tables provide an overview of all the orders you have created over the past 12 months and their current status. Statuses include:

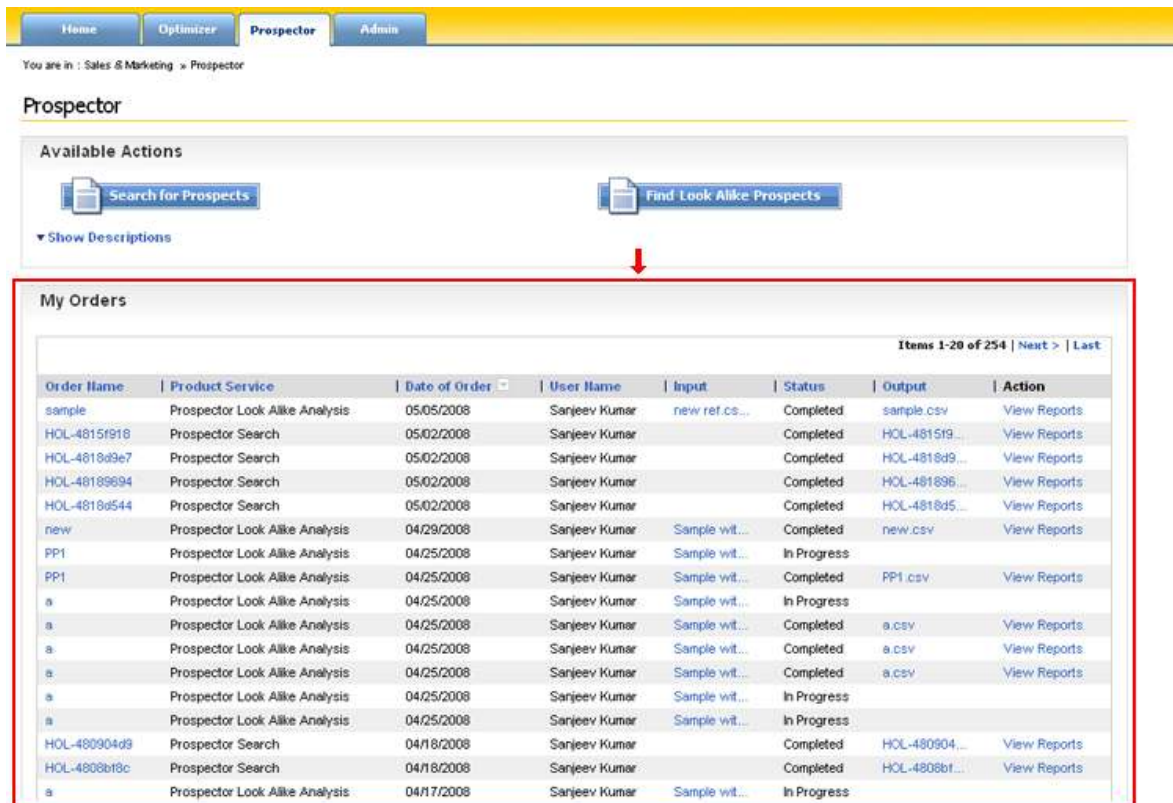
In Progress – An order you have submitted that is being processed.

Completed – A completed order, click the “Download Enhanced File” link to access the output file.

View Reports – A completed order, click the “View Reports” link to access the three analytic reports that accompany your file.

Click Search for Prospects to initiate the search process.

Click Find Look Alike prospects to initiate Look Alike Analysis.



The screenshot shows the Prospector interface. At the top, there are navigation tabs: Home, Optimizer, Prospector (selected), and Admin. Below the tabs, it says "You are in : Sales & Marketing > Prospector". The main heading is "Prospector". Underneath, there are two buttons: "Search for Prospects" and "Find Look Alike Prospects". A red arrow points from the "Find Look Alike Prospects" button down to the "My Orders" table. The "My Orders" table has a header with "Items 1-20 of 254 | Next > | Last". The table columns are: Order Name, Product Service, Date of Order, User Name, Input, Status, Output, and Action.

Order Name	Product Service	Date of Order	User Name	Input	Status	Output	Action
sample	Prospector Look Alike Analysis	05/05/2008	Sanjeev Kumar	new ref.cs...	Completed	sample.csv	View Reports
HOL-4815f918	Prospector Search	05/02/2008	Sanjeev Kumar		Completed	HOL-4815f9...	View Reports
HOL-4818d9e7	Prospector Search	05/02/2008	Sanjeev Kumar		Completed	HOL-4818d9...	View Reports
HOL-48189694	Prospector Search	05/02/2008	Sanjeev Kumar		Completed	HOL-481896...	View Reports
HOL-4818d544	Prospector Search	05/02/2008	Sanjeev Kumar		Completed	HOL-4818d5...	View Reports
new	Prospector Look Alike Analysis	04/29/2008	Sanjeev Kumar	Sample wit...	Completed	new.csv	View Reports
PP1	Prospector Look Alike Analysis	04/25/2008	Sanjeev Kumar	Sample wit...	In Progress		
PP1	Prospector Look Alike Analysis	04/25/2008	Sanjeev Kumar	Sample wit...	Completed	PP1.csv	View Reports
a	Prospector Look Alike Analysis	04/25/2008	Sanjeev Kumar	Sample wit...	In Progress		
a	Prospector Look Alike Analysis	04/25/2008	Sanjeev Kumar	Sample wit...	Completed	a.csv	View Reports
a	Prospector Look Alike Analysis	04/25/2008	Sanjeev Kumar	Sample wit...	Completed	a.csv	View Reports
a	Prospector Look Alike Analysis	04/25/2008	Sanjeev Kumar	Sample wit...	Completed	a.csv	View Reports
a	Prospector Look Alike Analysis	04/25/2008	Sanjeev Kumar	Sample wit...	In Progress		
a	Prospector Look Alike Analysis	04/25/2008	Sanjeev Kumar	Sample wit...	In Progress		
HOL-480904d9	Prospector Search	04/18/2008	Sanjeev Kumar		Completed	HOL-480904...	View Reports
HOL-4808bf8c	Prospector Search	04/18/2008	Sanjeev Kumar		Completed	HOL-4808bf...	View Reports
a	Prospector Look Alike Analysis	04/17/2008	Sanjeev Kumar	Sample wit...	In Progress		

Figure 14

4.3 Search For Prospects

Search for Prospects enables you to select criteria and search D&B's database of U.S. businesses to find companies that meet your specifications. From the Prospector tab, click on the "Search for Prospects" link to begin your search.

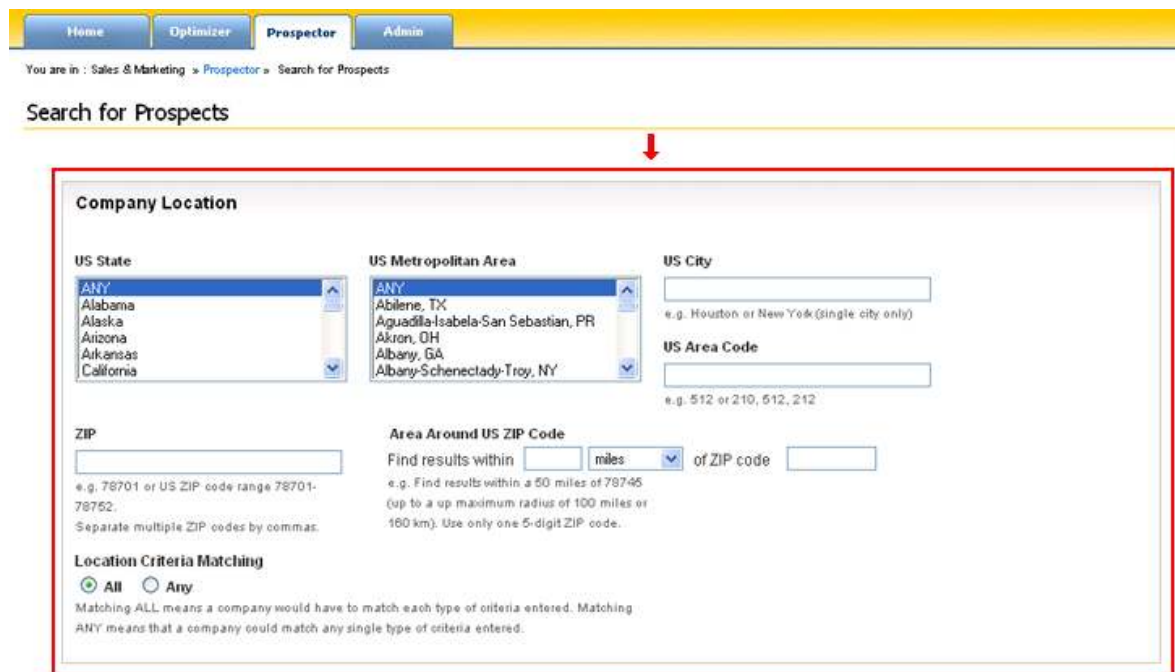
"Specify Your Criteria" Enter your search criteria. There are both drop-down menus from which you can make your selections, and fields for typing in text.

"Specify Prospects" Limit the number of prospects returned in your output file by choosing to receive all businesses meeting your criteria, or selecting specific companies from the results list.

"Download File" Your prospect list is available within minutes. You can open it immediately or save it to your computer. Within approximately one hour of completing your order, your prospect list and associated reports will appear in the "My Orders" table. You will be able to download your order from here as well.

"Name your order" Before you can download your prospect list you must enter a name for your order and a name for your output file.

Submit your order for prospect list. You can open the list immediately or save it to your computer. Within approximately one hour of completing your order, your prospect list and associated reports will appear in the "My Orders" table. You will be able to download your order from here as well.



The screenshot shows the 'Search for Prospects' form with the following fields:

- US State:** A dropdown menu with 'ANY' selected. Other options include Alabama, Alaska, Arizona, Arkansas, and California.
- US Metropolitan Area:** A dropdown menu with 'ANY' selected. Other options include Abilene, TX; Aguadilla-Isabela-San Sebastian, PR; Akron, OH; Albany, GA; and Albany-Schenectady-Troy, NY.
- US City:** A text input field with a placeholder example: 'e.g. Houston or New York (single city only)'.
- US Area Code:** A text input field with a placeholder example: 'e.g. 512 or 210, 512, 212'.
- ZIP:** A text input field with a placeholder example: 'e.g. 78701 or US ZIP code range 78701-78752. Separate multiple ZIP codes by commas.'
- Area Around US ZIP Code:** A section with a text input for 'Find results within', a dropdown for 'miles', and another text input for 'of ZIP code'. A placeholder example says: 'e.g. Find results within a 50 miles of 78745 (up to a up maximum radius of 100 miles or 160 km). Use only one 5-digit ZIP code.'
- Location Criteria Matching:** Radio buttons for 'All' (selected) and 'Any'. A note below explains: 'Matching ALL means a company would have to match each type of criteria entered. Matching ANY means that a company could match any single type of criteria entered.'

Figure 15

4.4 Find Look Alike Prospects

A look alike prospect matches the profile of one of your customer segments. When prospecting for new business, targeting businesses that share attributes of your best customer segments should improve the results of your acquisition programs.

Prospector takes you through an easy, four-step process that yields a list of highly targeted prospects:

Name the order you wish to submit

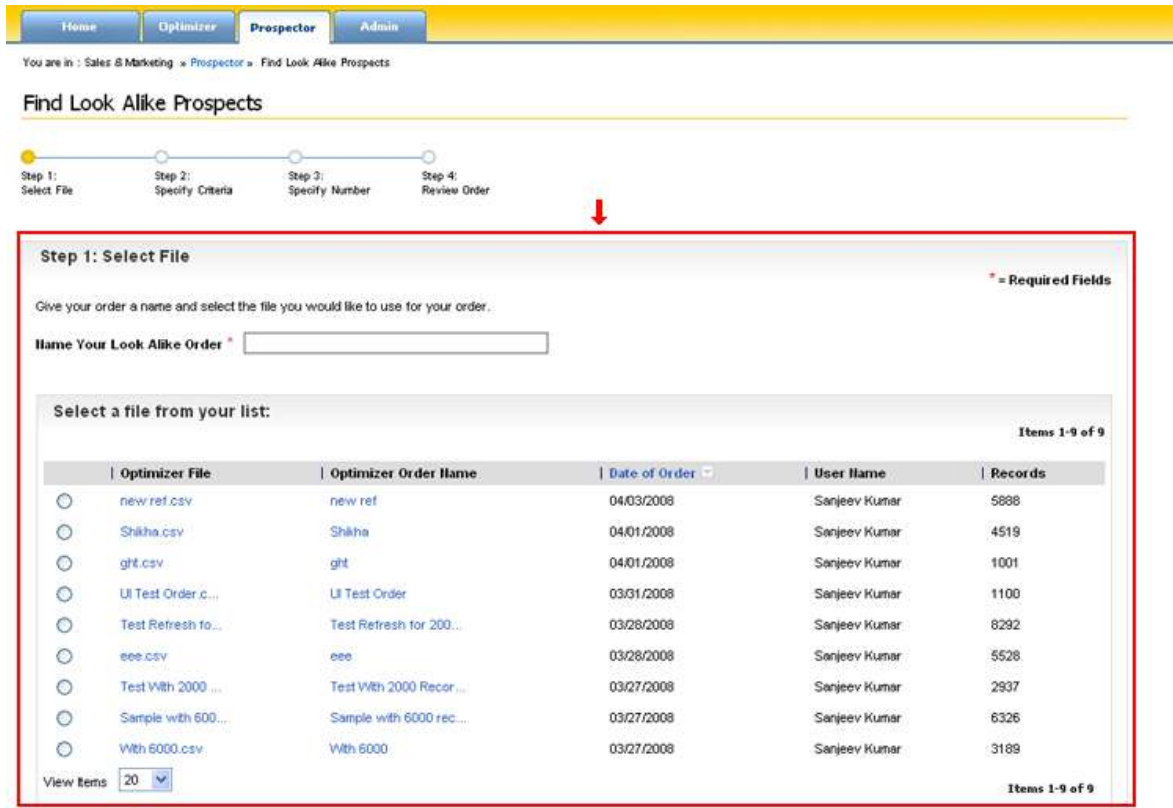
Select File – Choose a file from the list as the basis for analysis. Only files that have been run through Optimizer and contain 1,000 or more records will be displayed in the list.

Specify Criteria – Choose your objective and place filters on your customer list prior to analysis to limit the analysis and output to businesses meeting your size, age, or geography requirements. Applying these filters is not required. If you do not apply filters, the look alike analysis will be based on your entire file. If you do apply filters, your look alike analysis will be based on only those customers that meet your specifications.

Specify Number – Limit the number of prospects returned in your output file. If you would like to receive just the analysis and no prospect records, enter zero. If your role is “Prospector Analyst”, this field will automatically be set to 0 & be disabled, since you don’t have download permissions.

Review Order – Confirm the analysis specifications or make any necessary changes prior to submitting your order.

Submit the order for processing.



You are in : Sales & Marketing » Prospector » Find Look Alike Prospects

Find Look Alike Prospects

Step 1: Select File Step 2: Specify Criteria Step 2: Specify Number Step 4: Review Order

Give your order a name and select the file you would like to use for your order.

Name Your Look Alike Order *

Select a file from your list: Items 1-9 of 9

	Optimizer File	Optimizer Order Name	Date of Order	User Name	Records
<input type="radio"/>	new ref.csv	new ref	04/03/2008	Sanjeev Kumar	5888
<input type="radio"/>	Shikha.csv	Shikha	04/01/2008	Sanjeev Kumar	4519
<input type="radio"/>	ght.csv	ght	04/01/2008	Sanjeev Kumar	1001
<input type="radio"/>	UI Test Order c...	UI Test Order	03/01/2008	Sanjeev Kumar	1100
<input type="radio"/>	Test Refresh fo...	Test Refresh for 200...	03/28/2008	Sanjeev Kumar	8292
<input type="radio"/>	eee.csv	eee	03/28/2008	Sanjeev Kumar	5528
<input type="radio"/>	Test With 2000 ...	Test With 2000 Recor...	03/27/2008	Sanjeev Kumar	2937
<input type="radio"/>	Sample with 600...	Sample with 6000 rec...	03/27/2008	Sanjeev Kumar	6326
<input type="radio"/>	With 6000.csv	With 6000	03/27/2008	Sanjeev Kumar	3189

View Items Items 1-9 of 9

Figure 16

4.5 Prospector-Look Alike Reports

You will receive the Prospector-Look Alike report, which consists of the File Analysis/Profiling reports:

- Major Industry Division, with percentage of prospects in each SIC
- Prospect Distribution by State, with percentage of prospects in each State
- Employee Distribution, with percentage of prospects in each Employee group
- Industry by Employee Distribution cross-tabulation
- State by Employee Distribution cross-tabulation

In addition, you receive a Look Alike Profile report to download which details the analytics performed on your prospect file.

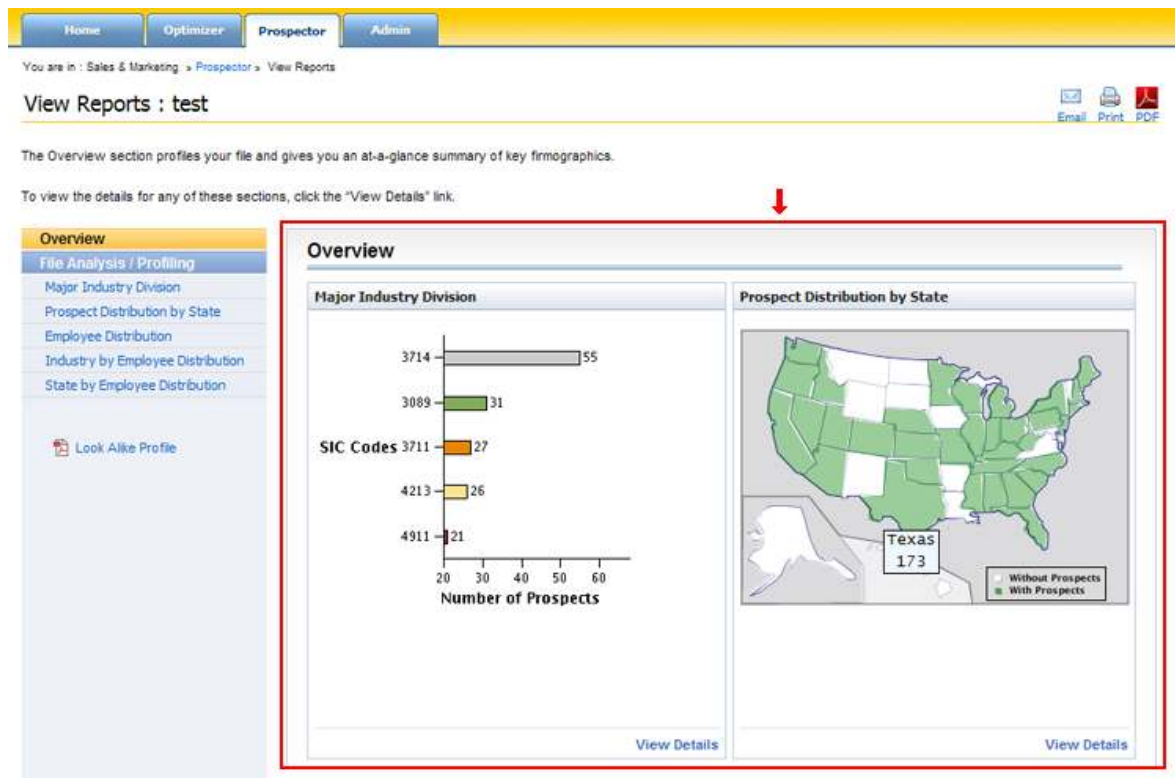


Figure 17

4.6 Prospector-Search For Prospects Reports

You will receive the Prospector-Search For Prospects report, which consists of the File Analysis/Profiling reports:

- Major Industry Division, with percentage of prospects in each SIC
- Customer Distribution by State, with percentage of prospects in each State
- Employee Distribution, with percentage of prospects in each Employee group
- Industry by Employee Distribution cross-tabulation
- State by Employee Distribution cross-tabulation

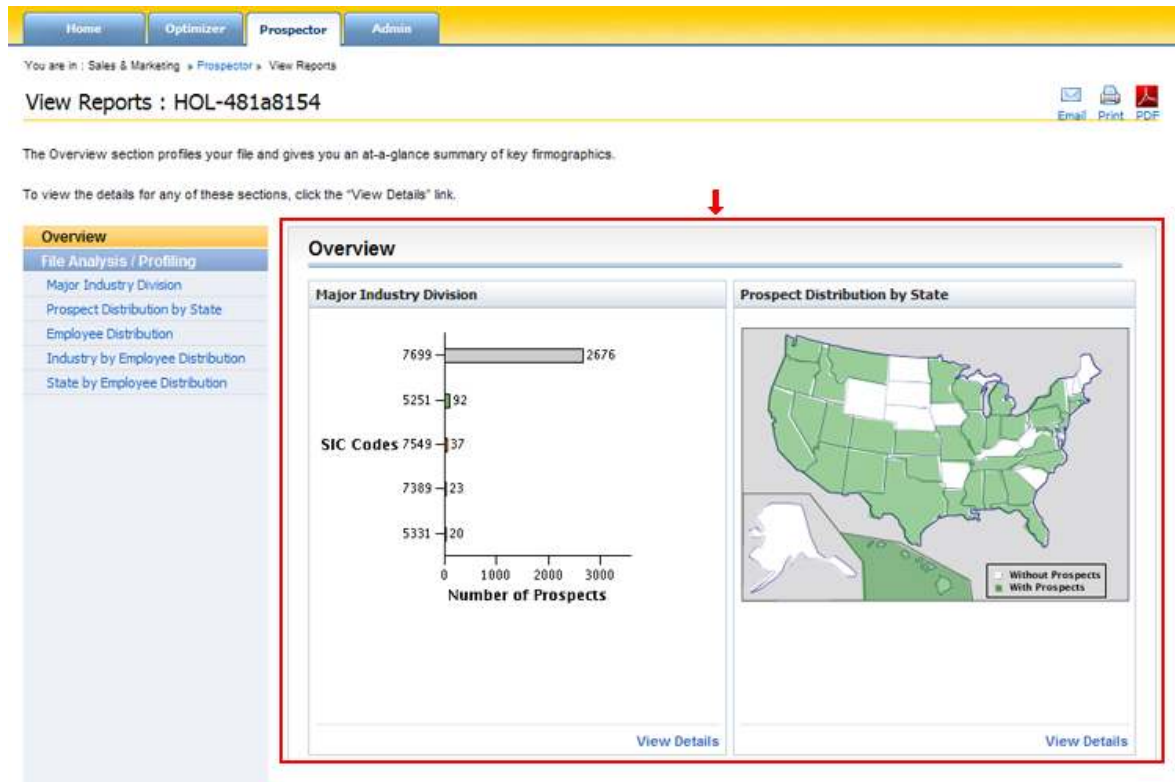


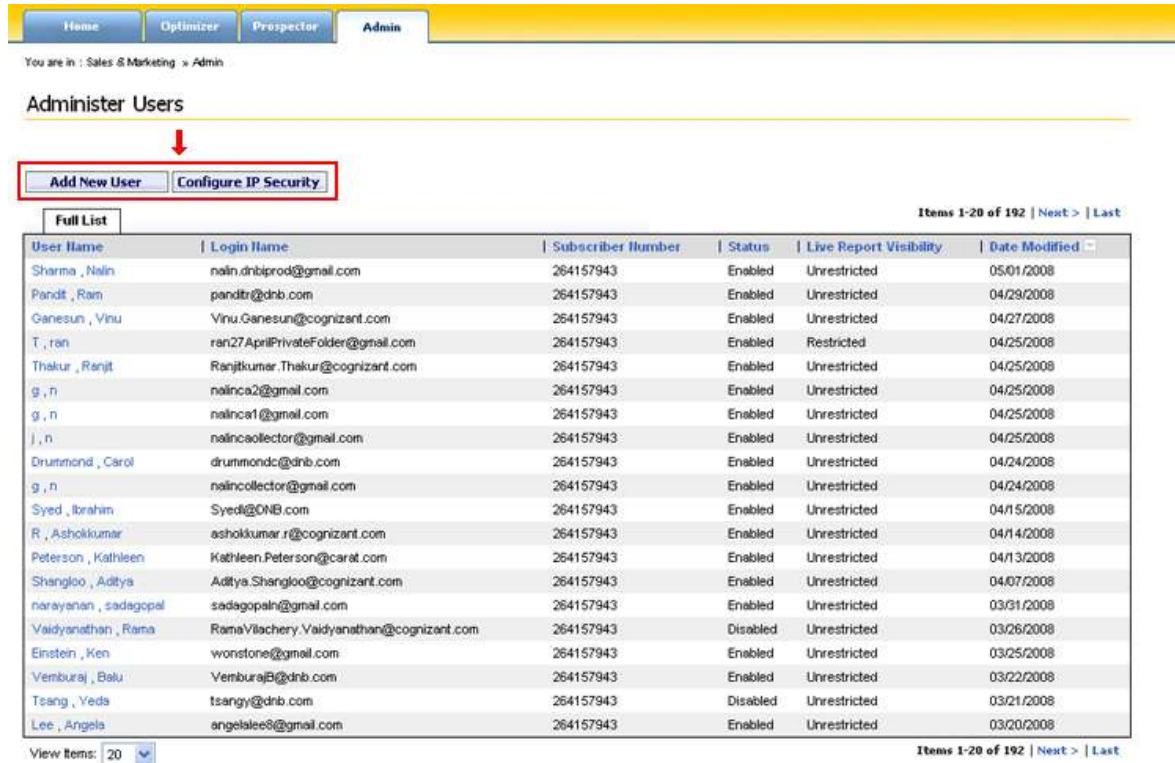
Figure 18

5. Administer Users Overview

5.1 Overview

The Administer Users link allows user to add new users, edit user profiles and set IP securities.

Add New Users
Configure IP Security



Home Optimizer Prospector Admin

You are in : Sales & Marketing > Admin

Administer Users

Add New User **Configure IP Security**

Full List Items 1-20 of 192 | Next > | Last

User Name	Login Name	Subscriber Number	Status	Live Report Visibility	Date Modified
Sharma , Nalin	nalin.dnbprod@gmail.com	264157943	Enabled	Unrestricted	05/01/2008
Pandit , Ran	panditr@dnb.com	264157943	Enabled	Unrestricted	04/29/2008
Ganesun , Vinu	Vinu.Ganesun@cognizant.com	264157943	Enabled	Unrestricted	04/27/2008
T , ren	ren27AprilPrivateFolder@gmail.com	264157943	Enabled	Restricted	04/25/2008
Thakur , Ranjit	Ranjtkumar.Thakur@cognizant.com	264157943	Enabled	Unrestricted	04/25/2008
g , n	nalinca2@gmail.com	264157943	Enabled	Unrestricted	04/25/2008
g , n	nalinca1@gmail.com	264157943	Enabled	Unrestricted	04/25/2008
j , n	nalincollector@gmail.com	264157943	Enabled	Unrestricted	04/25/2008
Drummond , Carol	drummondc@dnb.com	264157943	Enabled	Unrestricted	04/24/2008
g , n	nalincollector@gmail.com	264157943	Enabled	Unrestricted	04/24/2008
Syed , Ibrahim	Syed@DNB.com	264157943	Enabled	Unrestricted	04/15/2008
R , Ashokkumar	ashokkumar.r@cognizant.com	264157943	Enabled	Unrestricted	04/14/2008
Peterson , Kathleen	Kathleen.Peterson@carat.com	264157943	Enabled	Unrestricted	04/13/2008
Shangloo , Aditya	Aditya.Shangloo@cognizant.com	264157943	Enabled	Unrestricted	04/07/2008
narayanan , sadagopal	sadagopaln@gmail.com	264157943	Enabled	Unrestricted	03/31/2008
Vaidyanathan , Rama	RamaVilachery.Vaidyanathan@cognizant.com	264157943	Disabled	Unrestricted	03/26/2008
Einstein , Ken	wonstone@gmail.com	264157943	Enabled	Unrestricted	03/25/2008
Vemburaj , Balu	VemburajB@dnb.com	264157943	Enabled	Unrestricted	03/22/2008
Tsang , Yeda	tsangy@dnb.com	264157943	Disabled	Unrestricted	03/21/2008
Lee , Angela	angalee@gmail.com	264157943	Enabled	Unrestricted	03/20/2008

View Items: 20 Items 1-20 of 192 | Next > | Last

Figure 19

5.2 Administer Users

The user list screen displays the list of all user names in the DNBI Sales & Marketing workspace, their login names, subscriber account #, the date their user account was last modified, their status and their visibility option for Live Reports.

Home Optimizer Prospector Admin

You are in : Sales & Marketing > Admin

Administer Users

Add New User Configure IP Security

Full List Items 1-20 of 192 | Next > | Last

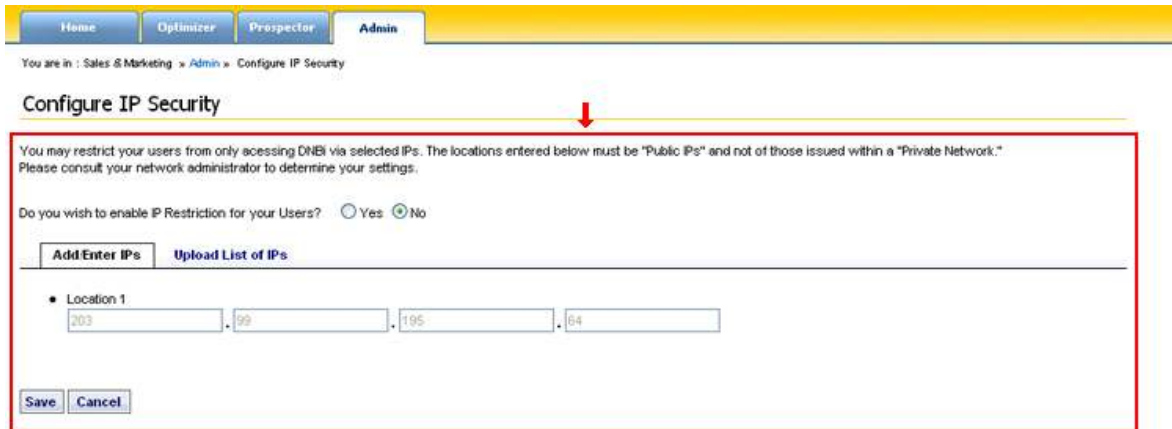
User Name	Login Name	Subscriber Number	Status	Live Report Visibility	Date Modified
Sharma , Nalin	nalin.dnbiprod@gmail.com	264157943	Enabled	Unrestricted	05/01/2008
Pandit , Ram	panditr@dnb.com	264157943	Enabled	Unrestricted	04/29/2008
Ganesun , Vinu	Vinu.Ganesun@cognizant.com	264157943	Enabled	Unrestricted	04/27/2008
T , ran	ran27AprilPrivateFolder@gmail.com	264157943	Enabled	Restricted	04/25/2008
Thakur , Ranjit	Ranjtkumer.Thakur@cognizant.com	264157943	Enabled	Unrestricted	04/25/2008
g , n	nainca2@gmail.com	264157943	Enabled	Unrestricted	04/25/2008
g , n	nainca1@gmail.com	264157943	Enabled	Unrestricted	04/25/2008
j , n	naincalector@gmail.com	264157943	Enabled	Unrestricted	04/25/2008
Drummond , Carol	drummondc@dnb.com	264157943	Enabled	Unrestricted	04/24/2008
g , n	naincollector@gmail.com	264157943	Enabled	Unrestricted	04/24/2008
Syed , Ibrahim	SyedI@DNB.com	264157943	Enabled	Unrestricted	04/15/2008
R , Ashokkumar	ashokkumar.r@cognizant.com	264157943	Enabled	Unrestricted	04/14/2008
Peterson , Kathleen	Kathleen.Peterson@carat.com	264157943	Enabled	Unrestricted	04/13/2008
Shangloo , Aditya	Aditya.Shangloo@cognizant.com	264157943	Enabled	Unrestricted	04/07/2008
narayanan , sadagopal	sadagopaln@gmail.com	264157943	Enabled	Unrestricted	03/31/2008
Vaidyanathan , Rama	RamaVilachery.Vaidyanathan@cognizant.com	264157943	Disabled	Unrestricted	03/26/2008
Einstein , Ken	wonstone@gmail.com	264157943	Enabled	Unrestricted	03/25/2008
Vemburaj , Balu	VemburajB@dnb.com	264157943	Enabled	Unrestricted	03/22/2008
Tsang , Yeda	tsangy@dnb.com	264157943	Disabled	Unrestricted	03/21/2008
Lee , Angela	angelalee@gmail.com	264157943	Enabled	Unrestricted	03/20/2008

View Items: 20 Items 1-20 of 192 | Next > | Last

Figure 20

5.3 Configure IP Security

This screen allows user to configure a list of permissible locations to access DNBI Sales & Marketing.



Home Optimizer Prospector Admin

You are in : Sales & Marketing > Admin > Configure IP Security

Configure IP Security

You may restrict your users from only accessing DNBI via selected IPs. The locations entered below must be "Public IPs" and not of those issued within a "Private Network." Please consult your network administrator to determine your settings.

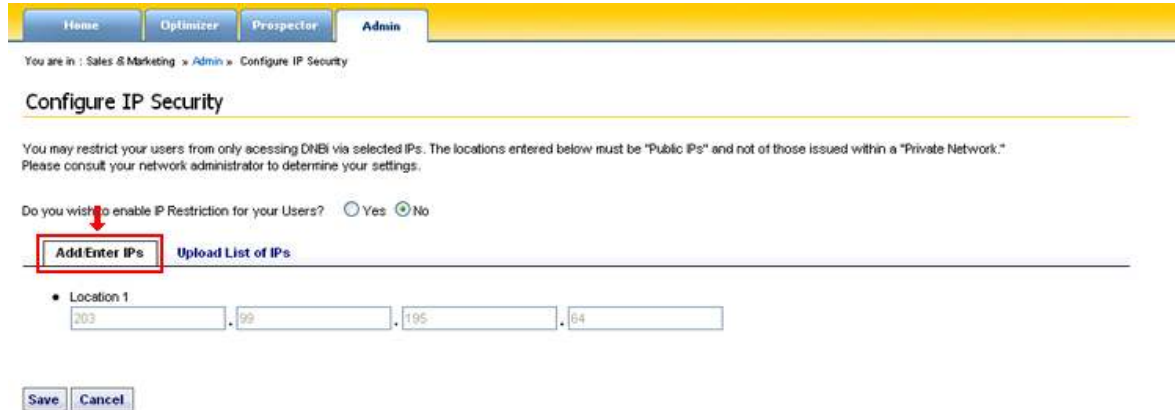
Do you wish to enable IP Restriction for your Users? Yes No

- Location 1
203 . 99 . 195 . 64

Figure 21

5.4 Add/Enter IPs

By clicking on Add/Enter IPs, user can enter upto 6 network IP addresses. Once enabled, users will not be able to login from IP addresses outside those network locations.



Home Optimizer Prospector Admin

You are in : Sales & Marketing > Admin > Configure IP Security

Configure IP Security

You may restrict your users from only accessing DNBI via selected IPs. The locations entered below must be "Public IPs" and not of those issued within a "Private Network." Please consult your network administrator to determine your settings.

Do you wish to enable IP Restriction for your Users? Yes No

Add/Enter IPs Upload List of IPs

• Location 1

203 . 99 . 195 . 64

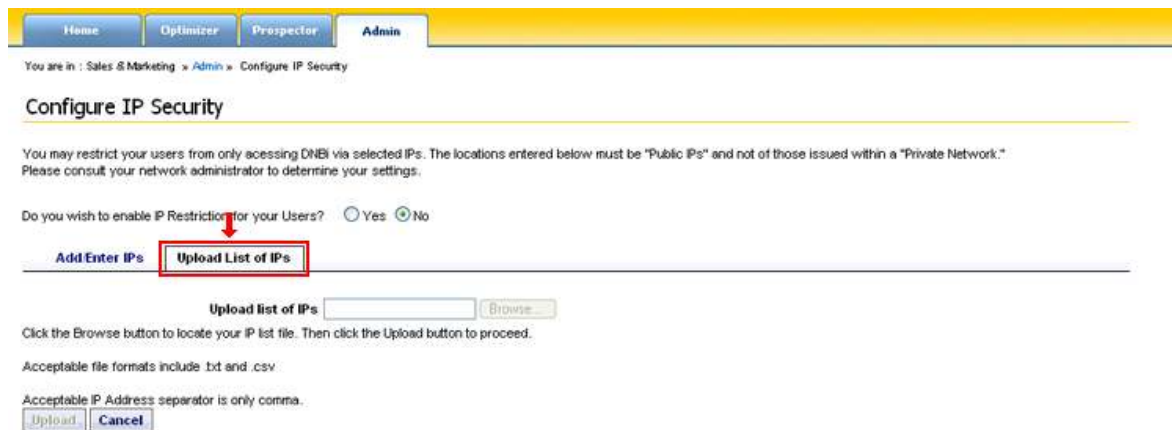
Save Cancel

Figure 22

5.5 Upload List of IPs

By clicking on Upload List of IPs, user can enable/disable IP restrictions for users.

User can upload an IP list file in .txt or .csv formats.



Home Optimizer Prospector Admin

You are in : Sales & Marketing » Admin » Configure IP Security

Configure IP Security

You may restrict your users from only accessing DNBI via selected IPs. The locations entered below must be "Public IPs" and not of those issued within a "Private Network." Please consult your network administrator to determine your settings.

Do you wish to enable IP Restriction for your Users? Yes No

Add Enter IPs **Upload List of IPs**

Upload list of IPs

Click the Browse button to locate your IP list file. Then click the Upload button to proceed.

Acceptable file formats include .txt and .csv

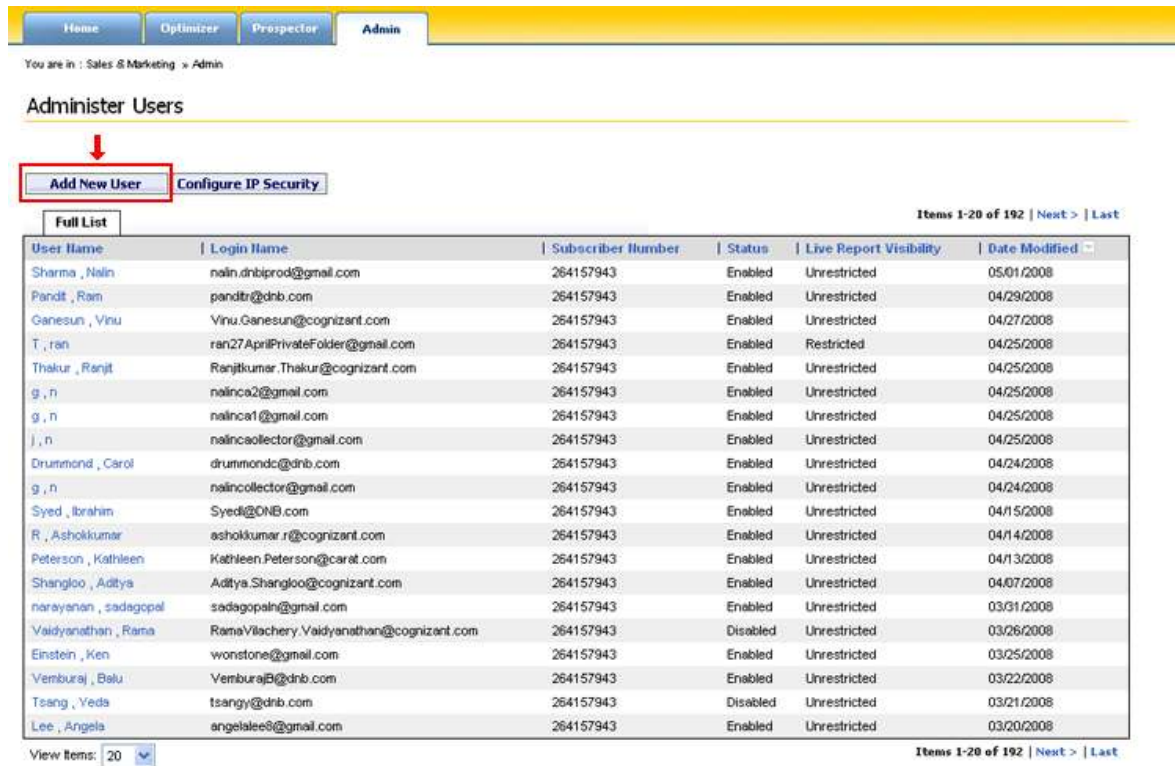
Acceptable IP Address separator is only comma.

Figure 23

5.6 Add New User

In the add user screen, enter the required information as indicated by a red asterisk.

In the user roles field, select the role(s) user will perform in DNBi Sales & Marketing, user can be assigned multiple roles depending upon the job function. The role(s) assigned determine the actions user can perform and view in DNBi Sales & Marketing. Hold down CTRL button to select multiple roles.



You are in : Sales & Marketing > Admin

Administer Users

[Add New User](#) [Configure IP Security](#)

[Full List](#) Items 1-20 of 192 | Next > | Last

User Name	Login Name	Subscriber Number	Status	Live Report Visibility	Date Modified
Sharma , Nalin	nalin.dnbprod@gmail.com	264157943	Enabled	Unrestricted	05/01/2008
Pandit , Ran	panditr@dnb.com	264157943	Enabled	Unrestricted	04/29/2008
Ganesun , Vinu	Vinu.Ganesun@cognizant.com	264157943	Enabled	Unrestricted	04/27/2008
T , ran	ran27AprilPrivateFolder@gmail.com	264157943	Enabled	Restricted	04/25/2008
Thakur , Ranjit	Ranjitkumar.Thakur@cognizant.com	264157943	Enabled	Unrestricted	04/25/2008
g , n	nalinca2@gmail.com	264157943	Enabled	Unrestricted	04/25/2008
g , n	nalinca1@gmail.com	264157943	Enabled	Unrestricted	04/25/2008
j , n	nalincaollector@gmail.com	264157943	Enabled	Unrestricted	04/25/2008
Drummond , Carol	drummondc@dnb.com	264157943	Enabled	Unrestricted	04/24/2008
g , n	nalincollector@gmail.com	264157943	Enabled	Unrestricted	04/24/2008
Syed , Ibrahim	Syed@DNB.com	264157943	Enabled	Unrestricted	04/15/2008
R , Ashokkumar	ashokkumar.r@cognizant.com	264157943	Enabled	Unrestricted	04/14/2008
Peterson , Kathleen	Kathleen.Peterson@carat.com	264157943	Enabled	Unrestricted	04/13/2008
Shangloo , Aditya	Aditya.Shangloo@cognizant.com	264157943	Enabled	Unrestricted	04/07/2008
narayanan , sadagopal	sadagopaln@gmail.com	264157943	Enabled	Unrestricted	03/31/2008
Vaidyanathan , Rama	RamaVilachery.Vaidyanathan@cognizant.com	264157943	Disabled	Unrestricted	03/26/2008
Einstein , Ken	wonstone@gmail.com	264157943	Enabled	Unrestricted	03/25/2008
Vemburaj , Balu	VemburajB@dnb.com	264157943	Enabled	Unrestricted	03/22/2008
Tsang , Veda	tsangy@dnb.com	264157943	Disabled	Unrestricted	03/21/2008
Lee , Angela	angelalee@gmail.com	264157943	Enabled	Unrestricted	03/20/2008

View Items: Items 1-20 of 192 | Next > | Last

Figure 24

6. Summary

DNBi Sales and Marketing Tutorial Review:

- **Optimizer:**
Optimizer is a Web application that provides you with the most complete and up-to-date DUNSRight™ information available on your sales and marketing files. Each order that you submit will cleanse and enhance your file as well as provide you with analytical reports that provide useful insight about your file for planning and analysis.
- **Prospector:**
Prospector is an optional add-on service to Optimizer that enables you to more precisely target prospects to improve the return on your acquisition programs. In addition to these search and analysis capabilities, Prospector provides you with analytic reports that summarize and benchmark your customers to give you a deeper understanding of your customer base and your market penetration.

D&B Sales & Marketing Solutions
For more information about DNBi, please contact D&B at 800.234.3867
www.DNB.com