

creditsafe<sup>✓</sup>

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# Prospects User Guide





## Introduction

Prospects gives your organisation access to 50 million business records, spanning 12 countries. Our data is updated daily from over 8,000 official and trusted sources, enabling you to fuel your Business Development Team with the information they need to increase their efficiency and success rates.

By utilising the profile of your successful acquisitions and lucrative long-term customers, Prospects provides you with the ability to find look-a-like organisations, both domestic and overseas. Refine and pre-qualify your sales leads with over 40 criteria, quickly understand the size of your target market and develop an effective strategy to fill your sales pipeline with viable opportunities.

Real-time information from thousands of sources allows you to confidently build your audience of ideal customers and assure their ability to pay you.

## Country Coverage

Prospects enables you to find sales leads across 12 countries including:

- UK
- Ireland
- Belgium
- Netherlands
- Italy
- Germany
- France
- United States
- Norway
- Sweden
- Luxembourg
- Denmark

## How to access Creditsafe Prospects

Access to Prospects is via the “Prospects” button on the left-hand navigation bar on your Creditsafe website. The product will open in a new tab within your browser. Please note, if you are having problems opening the product in a new tab this could be due to pop-up blockers.

## Product Dashboard

When you first navigate to Prospects you will be taken to the Prospects Product Dashboard.

The Prospects Product Dashboard allows a user to start a new search, view existing orders and details about those orders as well give you the ability to view any previously saved searches.

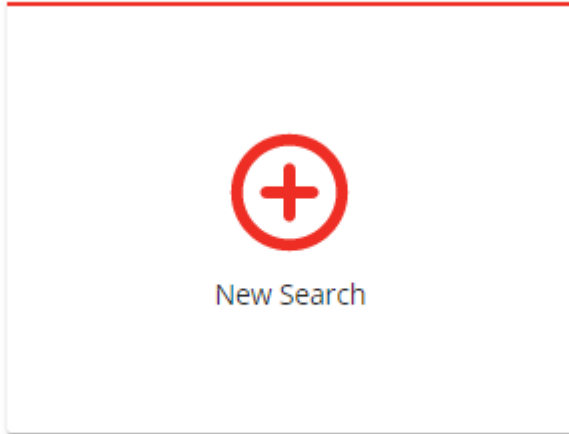
The screenshot shows the Creditsafe Prospects Product Dashboard. At the top left is the Creditsafe logo and 'Prospects' text. At the top right are links for 'My Account', 'English (UK)', and 'Sign Out'. The main content area features a grid of cards. Card 1 is a 'New Search' button with a plus icon. Card 2 is a 'rifiuti sardegna' Prospect List card showing status, date created, expiry date, and export status. Card 3 is a 'Load More' button. Card 4 is a 'View Saved Searches' button. Below the grid is a 'Please see the Expiry Date on your prospect list for details of their availability.' message.

- 1- New search: Click here to place a new order
- 2- These cards show your previous Prospects orders. Each card will display the following information:
  - a. Name
  - b. Description
  - c. Status
  - d. Date Created
  - e. Expiry Date
  - f. Exported – Whether the order has previously been exported to .csv or .xlsx format
  - g. Last Export Date – the date the file was last exported to .csv or .xlsx
- 3- Load more allows you to view more previous orders if the number of previous orders available to view is more than 5
- 4- View Saved Searches – Allows you to view, load and delete previously saved search criteria

Note: If you are new to Prospects, have not previously placed an order or if previous orders have expired no previous orders will be displayed.

## Placing a New Order

To start a new order, click 'New Search' from the Prospects Product Dashboard.



After clicking 'New Search' you will be taken to the Prospect Search Criteria screen where you can define your desired Prospect Profile.

As a minimum you need to define a geography as part of the search criteria. You can define a geography either by selecting from the geography hierarchy or searching by text and selecting the required geography.

[Return to Dashboard](#) Suppressions

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**Search Prospects**


Geographic

Company Profile

Company Financials


Business Signals


Exclusions


 Update Count

Companies found matching your criteria

Order

 View current selected criteria

 Save this search

 Clear all criteria

**Countries and regions to search:**

Search Regions

<b>Europe</b>	^
Belgium	v
Denmark	v
France	v
Germany	v
Ireland	v
Italy	v
Luxembourg	v
Netherlands	v
Norway	v
Sweden	v
United Kingdom	v
<b>North America</b>	^
United States	v

**Postal code search:**

Search for partial or complete postal codes

Postcode

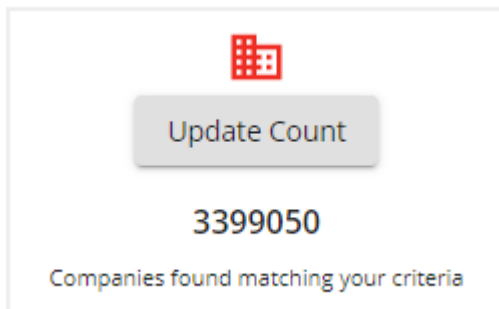
All of the available search criteria is grouped into 5 categories and displayed on the left hand side of the screen. These categories are:

- Geographic
- Company Profile
- Company Financials
- Business Signals
- Exclusions

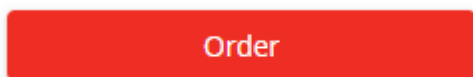
[Return to Dashboard](#)

The screenshot shows the 'Search Prospects' interface. A red circle highlights the search criteria categories: Geographic, Company Profile, Company Financials, Business Signals, and Exclusions. Below the categories is an 'Update Count' button, a dash indicating zero results, and the text 'Companies found matching your criteria'. A red 'Order' button is also visible. At the bottom, there are three options: 'View current selected criteria', 'Save this search', and 'Clear all criteria'.

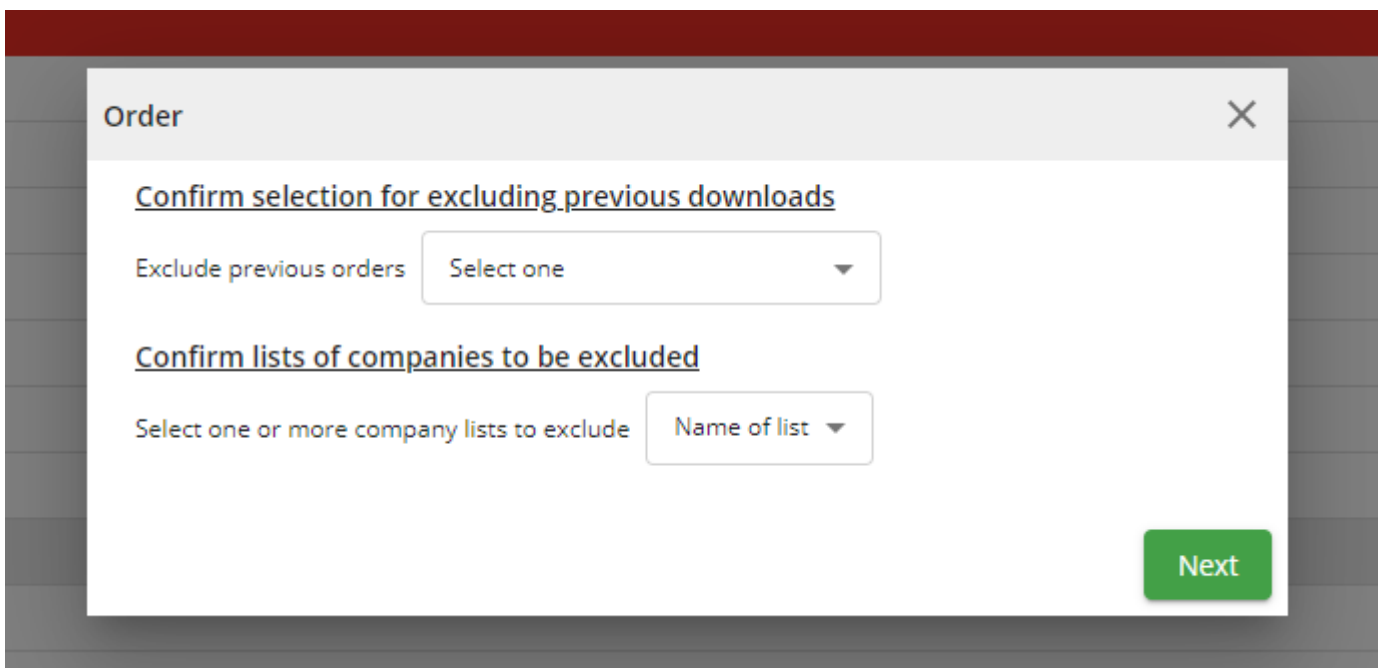
At any point you can click 'Update Count' to display the total number of companies that match the current search criteria. If any changes are made after a count is made the count will reset.



When you are happy with the selected search criteria, click 'Order' to progress with your order. No charges will be made at this point.



On clicking 'Order' a popup will open, asking you to confirm your selection of exclusions of previous orders and confirm any applied suppression lists.





When you then click 'Next' you will be shown a count of the companies matching your search criteria for the chosen geographies.

Here you can enter how many companies you would like to include in your order from each country.

At this stage, you will be shown the number of credits you currently have available for the Prospect service. You will be shown the number of credits you will have remaining after this order is processed.

### Order

**Confirm Order Amount**

 Netherlands	3399050	<input type="text" value="50"/>	 United Kingdom	6180189	<input type="text" value="100"/>
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**Credit Available**

**Requested Quantity**

**Remaining Credits**

'Credit Available' above displays the credit available within your subscription prior to this order. If you would like to top-up your account balance please call your account manager.  
'Remaining Credits' above displays the remaining credits available within your subscription if you were to proceed with the order.

[Next](#)

**Note:** You will not be able to progress if you have insufficient account balance.

On clicking 'Next' you will be taken to the next page and asked to define an Order Name and Order Description. The Order Name and Order Description will be visible to you on the Prospect Product Dashboard.

**Order Name** is mandatory and must be unique

**Order Description** is optional

### Order

**Name and Description**

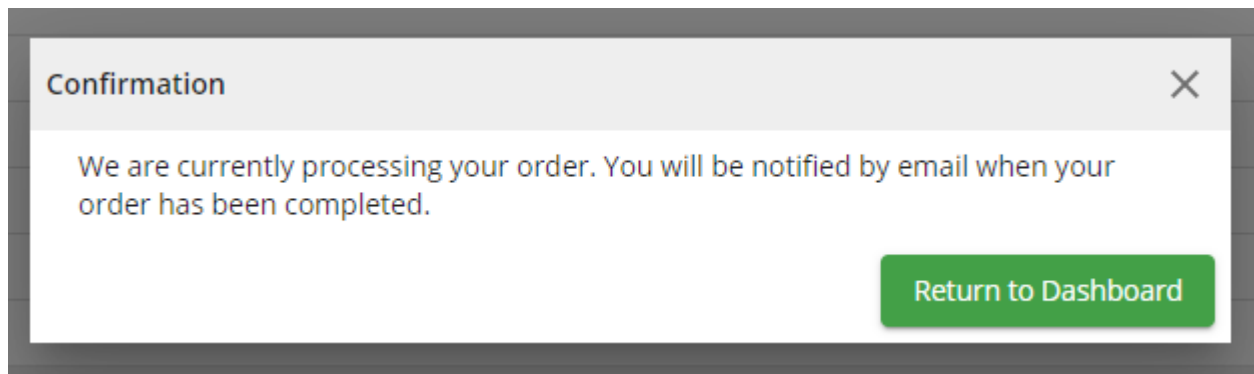
**Order Name**

**Order Description**

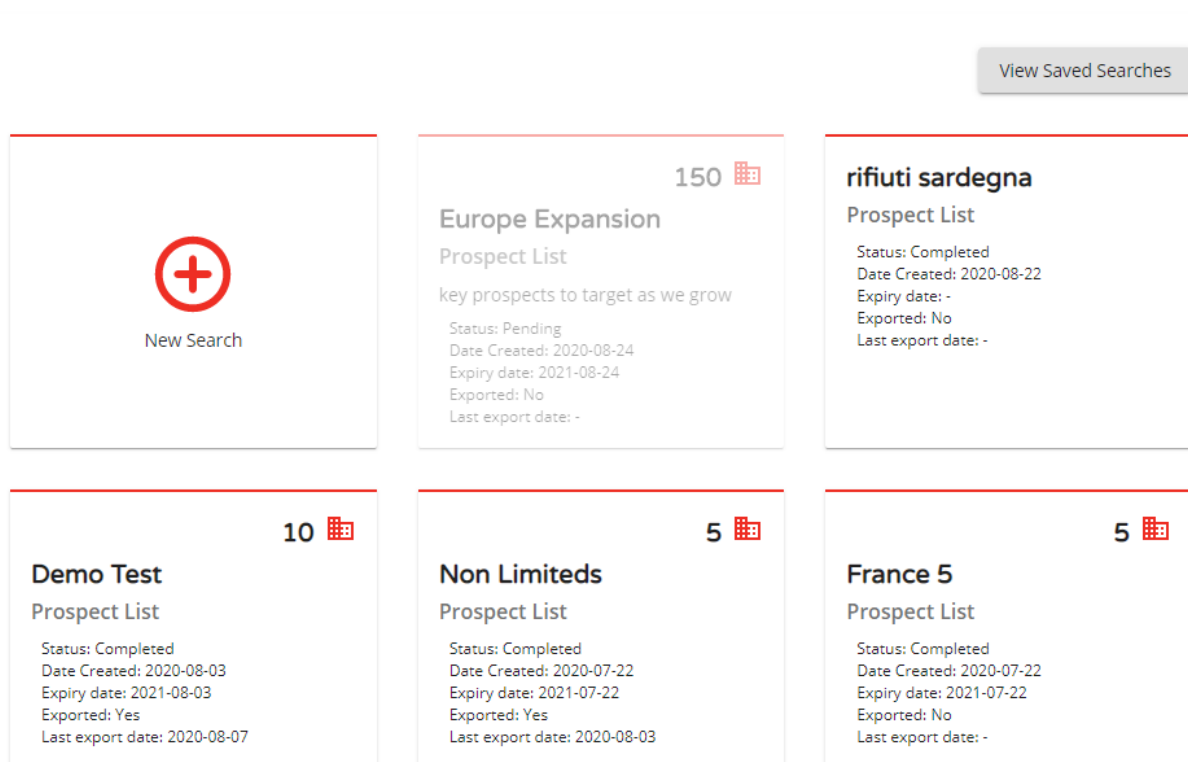
[Confirm Order](#)

Once you have confirmed your order, a confirmation message will be displayed. At this stage we are processing your order and will email you when the processing is complete.

Orders usually take a few minutes to process.



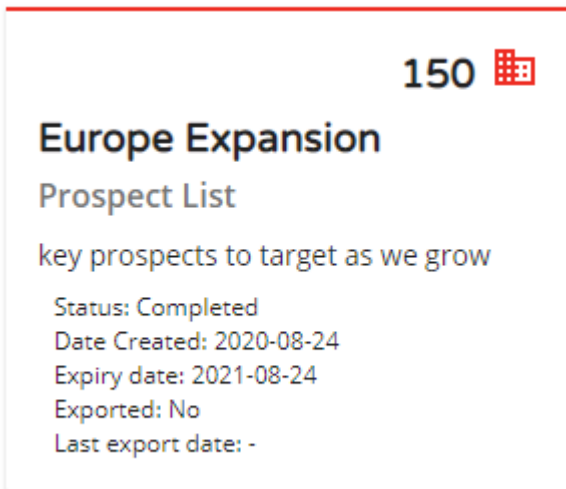
When you next visit the product dashboard you will see the order is in a "Pending" status – illustrated by a faded appearance to the Order Card



You will be unable to access the contents of the order until the order processing has been completed. You will receive an email notification once the order is complete, at this point please refresh your Prospect Product Dashboard.



Once the order is complete the status will update to Completed, and the Order Card will be in full colour.

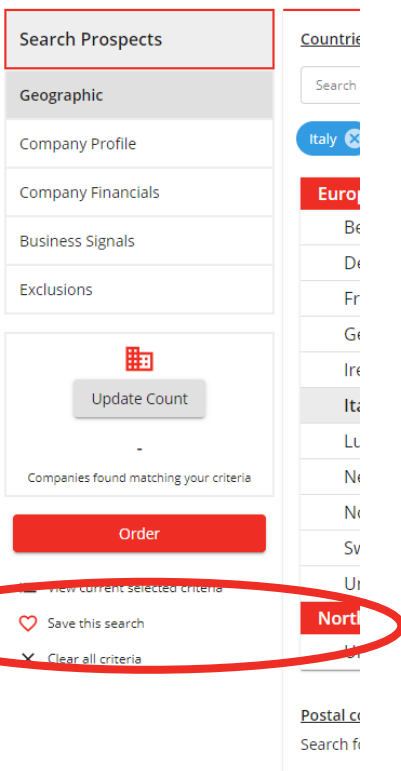


## Save Search Criteria

If you have specific search criteria that you would either, like to use across multiple orders or wish to save work in progress and return to complete the order at a later date, then this is possible through the “Save this search” functionality.

In order save your search criteria, click on ‘Save this search’ within the Prospect Search Criteria screen. This is located on the left hand side of the screen.

[Return to Dashboard](#)



Once you click ‘Save this search’ a popup will open prompting you to provide a name and description for the search.

### Save search criteria

Name: Demo Save

Description: August

Date: 2020-08-24

Save

Once saved, all saved search criteria can be viewed from 'View Saved Searches' within the Product Dashboard.

[View Saved Searches](#)

**New Search**

**150**

**Europe Expansion**

Prospect List

key prospects to target as we grow

Status: Completed  
Date Created: 2020-08-24  
Expiry date: 2021-08-24  
Exported: No  
Last export date: -

**rifuti sardegna**

Prospect List

Status: Completed  
Date Created: 2020-08-22  
Expiry date: -  
Exported: No  
Last export date: -

**10**

**Demo Test**

Prospect List

Status: Completed  
Date Created: 2020-08-03  
Expiry date: 2021-08-03  
Exported: Yes  
Last export date: 2020-08-07

**5**

**Non Limiteds**

Prospect List

Status: Completed  
Date Created: 2020-07-22  
Expiry date: 2021-07-22  
Exported: Yes  
Last export date: 2020-08-03

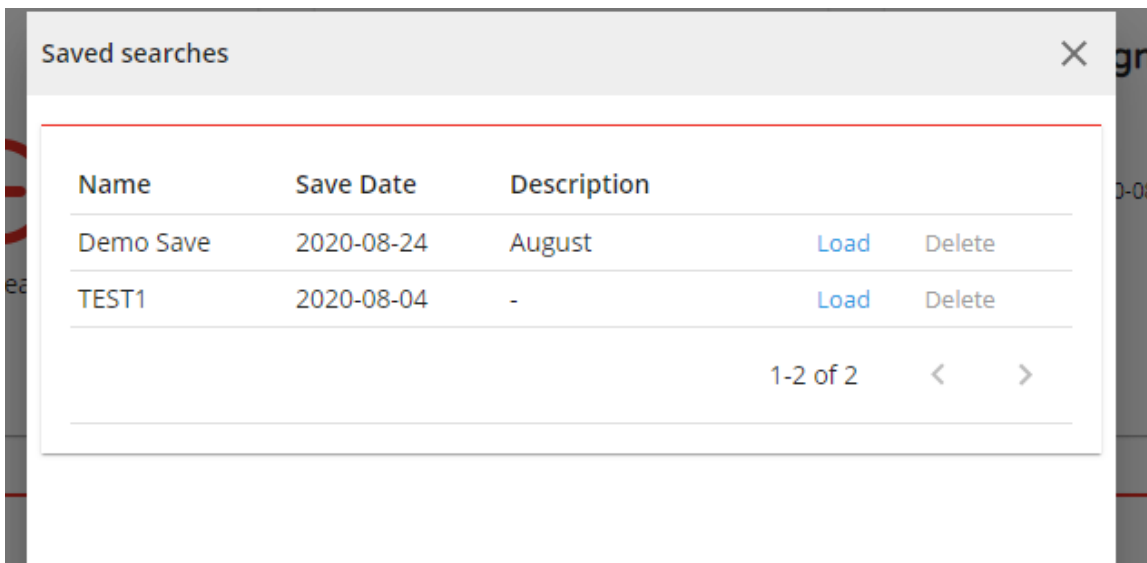
**5**

**France 5**

Prospect List

Status: Completed  
Date Created: 2020-07-22  
Expiry date: 2021-07-22  
Exported: No  
Last export date: -

On selecting 'View Saved Searches' a popup displaying all previous saved searches is opened. From here you can re-visit or delete selected saved searches.



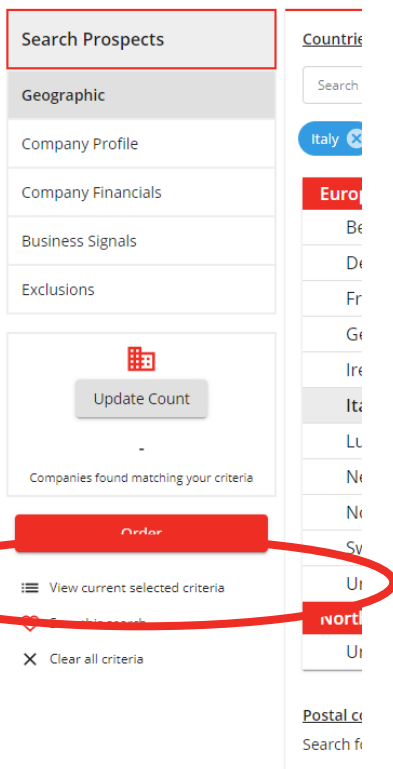
If you click the “Load” button, you will be taken to the Prospect Search Criteria screen, where all previously saved criteria will be shown.

Any further changes to the search criteria will need to be resaved as a new saved search.

## View Search Criteria

If you wish to view all currently selected search criteria then at once whilst building a Prospect Audience, you can do this by selecting ‘View current selected criteria’ option from the left-hand navigation.

< Return to Dashboard



A popup will open displaying all selected search criteria. If you wish to remove any search criteria, you can do this by clicking the 'X' of the row you wish to remove.

Selected search criteria
✕

Category	Criteria	Selection	
Company Profile	Company Status	Active	✕
Geographic	Countries	United Kingdom	✕
Company Profile	International Activity Codes	G - WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	✕
Company Profile	International Activity Codes	K - FINANCIAL AND INSURANCE ACTIVITIES	✕
Business Signals	Credit Limit Max	820k	✕
Business Signals	Credit Limit Min	84k	✕
Business Signals	Credit Score Min	57	✕

Save

## Suppression File Upload

If you wish to exclude a specific list of companies from an order, then this can be done using an exclusions list. There are two ways to create a list to exclude:

1. **Through our Data Cleaning service** – saving you time not needing to upload a file multiple times. Please contact your account manager to utilise this option.
2. **Upload a suppression file directly to Prospects** – This method is detailed here below.

### Companies to be excluded

Select one or more company lists to exclude

Name of list

chris E2E test US Sample



prospects t1



prospects t2



If you wish to upload a suppression file, please click the 'Suppressions' button in the top right of the Prospect Search Criteria screen.

**Search Prospects**

- Geographic
- Company Profile
- Company Financials
- Business Signals
- Exclusions**

Update Count

-

Companies found matching your criteria

Order

View current selected criteria  
 Save this search  
 Clear all criteria

**Previous downloads to be excluded**

Exclude previous orders Select one

**Companies to be excluded**

Select one or more company lists to exclude Name of list

chris E2E test US Sample
prospects t1
prospects t2

**Telephone number available**

Exclude all Companies without Telephone Number

**Postcode available**

Exclude all companies with no postcode

**Financial Data available**

Exclude companies where no financial data available

**Unique Telephone Number**

Only return unique telephone numbers

On clicking 'Suppressions' you will be taken to a new screen where you can upload your suppression file.

The process is outlined on screen:

1. Upload Your Data (i.e. your file)
2. We will match your file
3. We will email you when matching is completed and your list is ready to use within a prospects order

< Return to Search

**New File**

1

**Upload Your Data**

Just complete the form below and upload your file

2

**Data Matching**

We will match you company data to Creditsafe data

3

**Portfolio Created**

We will email you when we have completed company matching

**File Upload**

<b>Company Name</b>	<b>Creditsafe Customer ID</b>	<b>Creditsafe User ID</b>
<input style="width: 95%;" type="text" value="CSGROUP - INTERNAL BE"/>	<input style="width: 95%;" type="text" value="101615288"/>	<input style="width: 95%;" type="text" value="101412539"/>
<b>Contact Person</b>	<b>Contact Telephone</b>	<b>Contact Email</b>
<input style="width: 95%;" type="text" value="Matthew Penrhyn-Jones"/>	<input style="width: 95%;" type="text" value="0"/>	<input style="width: 95%;" type="text" value="owen.thomas@creditsafe.com"/>

**Upload a file**

Drop a file to attach, or click to browse

Following file extensions are accepted: .csv, .xls, .xlsx

File sizes are limited to 10 MB

**Job Name**

File contains header row

**Important information**

For data to be successfully matched to Creditsafe data the file you upload must contains 3 fields in the following sequence

1. Company name
2. Postcode
3. Country

You need to upload a suppression file with minimum criteria in order for us to complete the matching process.

For company data to be matched to Credifsafe database, the file you upload must contains 3 fields in the following sequence:

1. **Company name**
2. **Postcode**
3. **Country**

If the first row in your upload is a header, please ensure 'File contains header row' is selected.

The Global Business Intelligence Experts

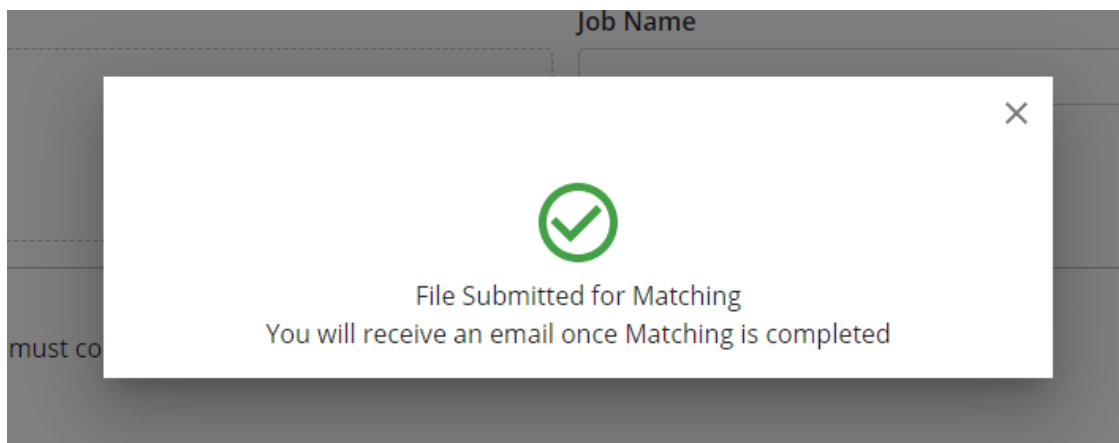
### File Upload

Company Name	Creditsafe Customer ID	Creditsafe User ID
CSGROUP - INTERNAL BE	101615288	101412539
Contact Person	Contact Telephone	Contact Email
Matthew Penrhyn-Jones	0	owen.thomas@creditsafe.com
Upload File	Job Name	
Drop a file to attach, or click to browse		
Following file extensions are accepted: .csv, .xls, .xlsx		
File sizes are limited to 10 MB		
<input type="checkbox"/> File contains header row		Upload File
<b>Important information</b>		
For data to be successfully matched to Creditsafe data the file you upload must contain 3 fields in the following sequence		
1. Company name		
2. Postcode		
3. Country		
If the first row in your upload is a header please ensure 'File contains header row' is selected		

Drag and drop your file or click here to browse for a file.

Once your file has been added to the form, select a name, and indicate whether header row exists. Then complete the upload process by pressing the 'Upload File' button.

Once the upload is complete, a confirmation message will be displayed telling you that the file upload is complete and that you will receive an email when the matching process is complete.



The Progress of your orders is displayed within the 'Previous Uploads' section of the Suppressions page.

Customer ID	Company Name	Job Name	Created Date	File Size	Match Rate	Status
101615288	-	DE PDL.xls	2020-08-24	0 Bytes	-	Pending

Rows per page: 10 1-1 of 1

## View Order

To view your order, first visit the Prospects Product Dashboard and select the order you would like to open.

Note: Any orders placed on the new Prospect tool will be valid for 12 months

10

### First prospect list

#### Prospect List

Status: Completed  
 Date Created: 2020-08-24  
 Expiry date: 2021-08-24  
 Exported: No  
 Last export date: -

Once you select an order to view, you will be taken to the Prospects Order Details page. This is the contents of your order. Here all prospects included in your order are displayed. At a high level company name, company number, safe number and address are visible to the user.

< Return to Dashboard
View selected criteria | Suppressions | Export Prospects

10 Prospects				
Company Name	Company Number	Safe Number	Address	
DIIVAS CAFE & RESTAURANT LTD	12204749	UK17735900	246 DEWSBURY ROAD	Prospect Data
HEATH HOUSEWARES AND JANITORIAL SUPPLIES (HEATHHJS) LTD	12204813	UK17735964	63 NASEBY ROAD	Prospect Data
GOLDSTONE DEVELOPMENTS LIMITED	12204855	UK17736006	71 NEW DOVER ROAD KENT	Prospect Data
WCCP LTD	12204878	UK17736029	22 ORCHARD CROFT WALES	Prospect Data
OUR MENOPAUSE GROUP LIMITED	12204922	UK17736073	WILLES HOUSE WILLES ROAD LEAMINGTON SPA	Prospect Data
PEGASUS ENGINEERING SOLUTIONS LIMITED	12204929	UK17736080	23 ERMINE STREET GRANTHAM LINCOLNSHIRE	Prospect Data
MAYFLOWER HOHO LIMITED	12204986	UK17736137	128 BRAMHALL LANE STOCKPORT	Prospect Data
ORMSKIRK PILATES AND WELLBEING LIMITED	12205008	UK17736159	THE HART SHAW BUILDING SHEFFIELD	Prospect Data
THE OCCULIST LTD	12205090	UK17736241	LITTLEHAVEN HOUSE HORSHAM WEST SUSSEX	Prospect Data
ELICONSULTING LIMITED	12205209	UK17736360	70A CLARENCE ROAD HERTFORDSHIRE	Prospect Data

Rows per page: 25 | 1-10 of 10 | < >

Please note: All company data included within your prospect order is correct as of the order date and is not refreshed or kept up-to-date. Therefore, we recommend ordering in batches sizes that suit your businesses capacity. To view the most recent company data please click view the company report within a prospect record.

To view the full detail of a selected company from within your order, select 'Prospect Data' on the right-hand side of the row.

View selected criteria
Suppressions
 Export Prospects

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Prospect Data

When you select “Prospect Data”, a popup is open displaying the point-in-time-data stored for the selected company record.

This popup contains an Overview on the company, including details such as Company Identification and Business Signals. You can also select Contact Details / Directors to display the company contact details and directors if known for the company.

**DIIVAAS CAFE & RESTAURANT LTD (UK17735900)**

Overview | Contact Details / Directors

### Company Identification

Company Name	DIIVAAS CAFE & RESTAURANT LTD	Company Status	Active
Company Number	12204749	Country	United Kingdom
Safe Number	UK17735900	Legal Form	PRIVATE LIMITED WITH SHARE CAPITAL
Incorporation Date	2019-09-13	Employees	-
Activity Code <i>i</i>	56102	Activity Description <i>i</i>	-

**Please note:** All company data included within your prospect order is correct as of the order date and is not refreshed or kept up-to-date. Therefore, we recommend ordering in batches sizes that suit your businesses capacity. To view the most recent company data please click view the company report within a prospect record.

### Business Signals

Credit Score	International Score	Credit Limit
42	C	500,0€

**View Full Company Report / Financials / Group Structure**

Gain a deeper understanding of this business by viewing it's full business report. Creditsafe reports are filled up to date information and rich insights to inform stronger sales conversations and reveal buying signals.

To gain greater insight on a prospect, to understand relationships with other companies or to gain further financial details click through to view the company report. This is possible in two ways:

1. Select the banner at the bottom of the Prospect Data popup, or;
2. Click the down arrow next to the Prospect Record from the order details screen and select ‘View Company Report’

Prospect Data | View company Report

Prospect Data | ▾



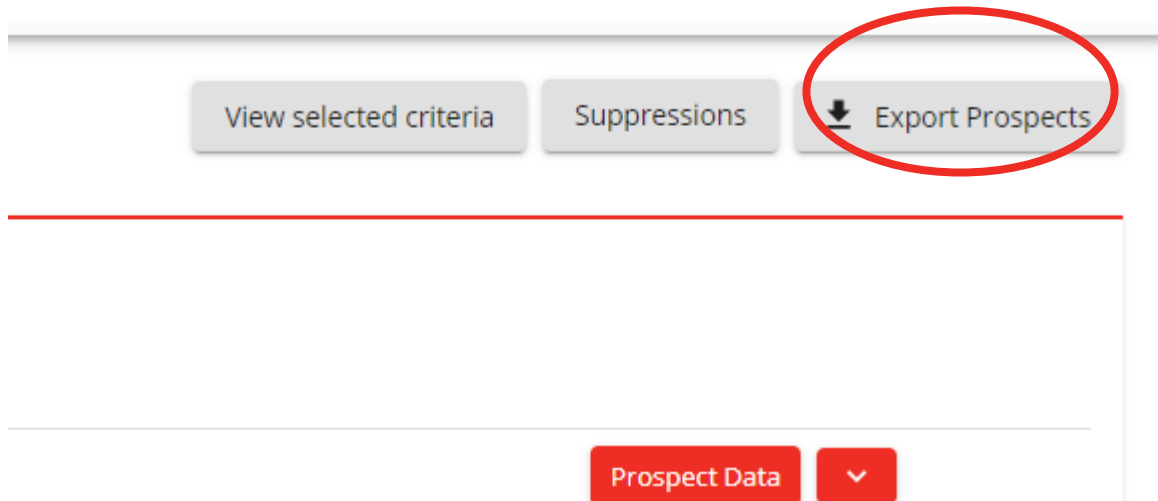
Note: orders placed on the old Prospects product have been migrated to the new tool. Viewing these orders is slightly different behaviour. The migrated orders will still appear on your Prospects Product Dashboard however you will not be able to benefit from viewing these from within our tool. When a migrated order is selected to view, the .xlsx file that was available on the previous product will be downloaded to your device.

## Export Order

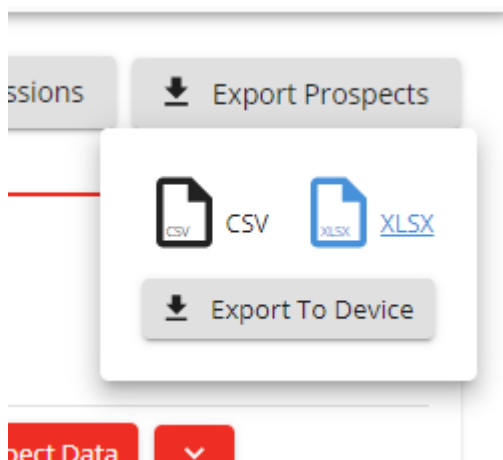
In addition to being able to view the company from within the user interface, you are able to download your Prospects Order in two different file formats:

1. .csv
2. .xlsx

You can do this by clicking the 'Export Prospects' button in the top right corner of the Prospect Order Details screen

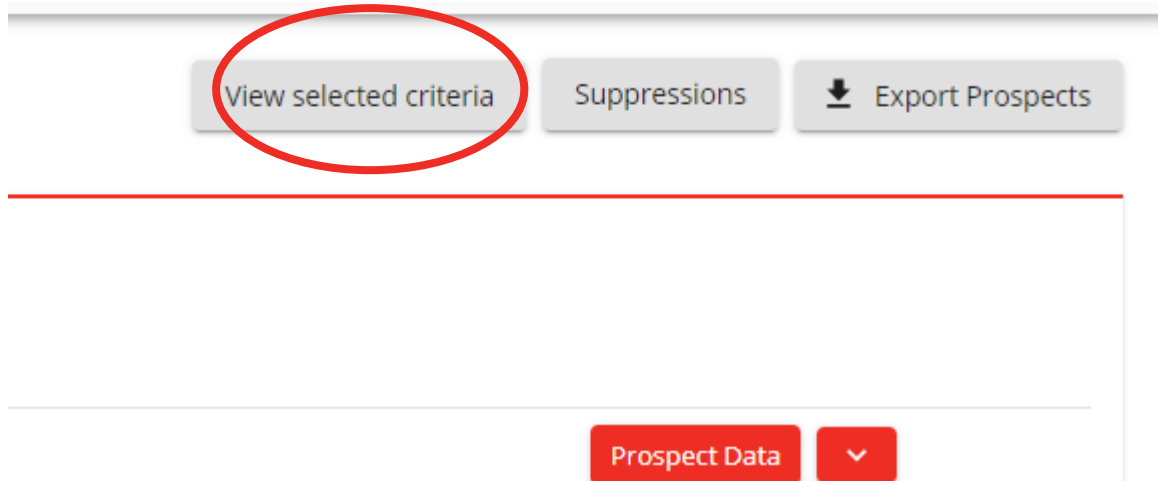


Once selected, you can then choose the file format you wish to download your order in. Once you have selected your chosen file format click 'Export To Device'. The file will then be downloaded to your device in your chosen format.



## View Selection Criteria

Once an order is placed it is easy to forget what criteria you had previously selected to arrive at the order. From within the Prospect Order Details page you can select 'View selected criteria' button from the top right of the page.



This will open a popup displaying the criteria you used to place the order.

