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Prospects User Guide

Introduction

Prospects gives your organisation access to over 70 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 45 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.

*Canadian users can access 13 countries (they also have CA prospects)

Country Coverage

Prospects enables you to find sales leads across 13 countries including:

- UK
- Ireland
- Belgium
- Netherlands
- Italy
- Germany
- France
- United States
- Norway
- Sweden
- Luxembourg
- Denmark
- Canada (for Canadian businesses only)

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 popup 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.
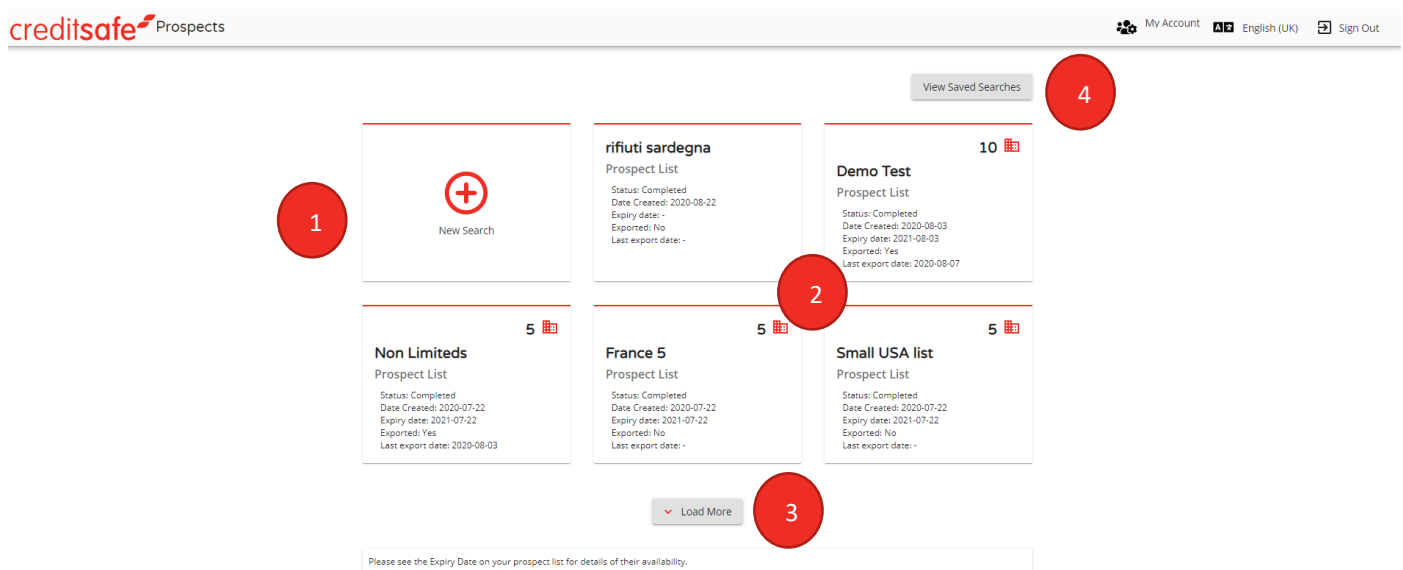

1- New search: Click here to place a new order
2- These cards show your previous Prospects orders. Each card will display the following information:
   a. Name
   b. Description
   c. Status
   d. Date Created
   e. Expiry Date
   f. Exported – Whether the order has previously been exported to .csv or .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.
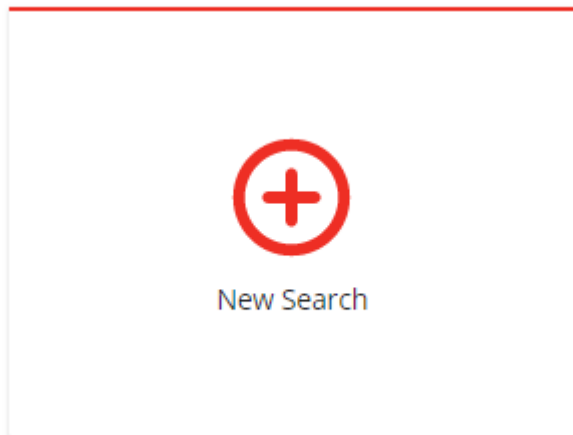
After clicking 'New Search' you will be taken to the Prospect Search Criteria screen where you can define your desired Prospect Profile.

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.

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All of the available search criteria are 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

Search Prospects

Geographic

Company Profile

Company Financials

Business Signals

Exclusions
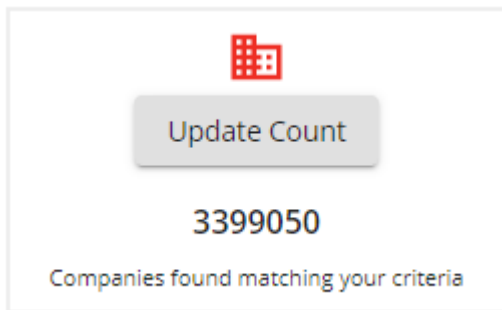
Update Count

-

Companies found matching your criteria

Order

☰ View current selected criteria

♡ Save this search

✕ Clear all criteria

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.

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
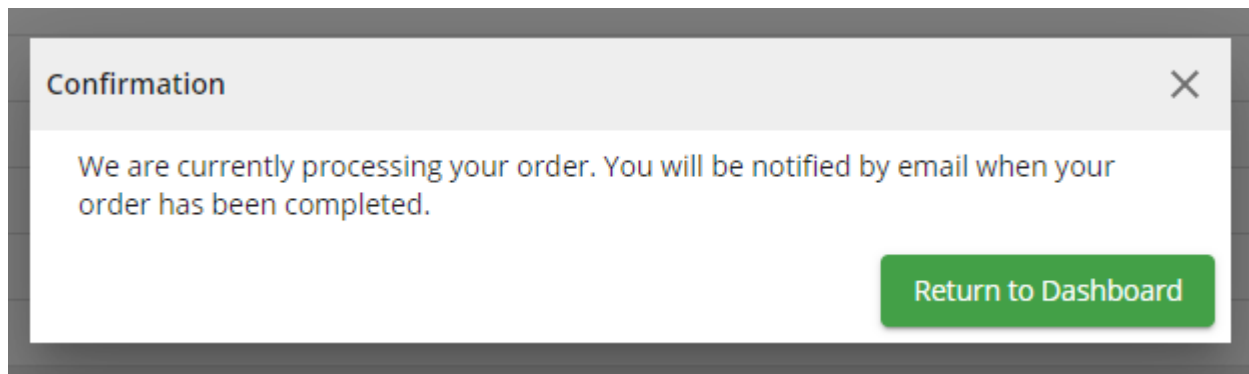
Order Description is optional

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.

Search Geography

When searching for a location you have two options, you can search through the location hierarchy or you can search via the text search

When a location is selected, your selected locations will appear as blue 'chips' informing you what locations we will be included or excluded from your search. Locations will be separated by country to simplify multi-country searches.

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.

![creditsafe logo]

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.

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

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

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.

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.

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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.

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. Map your data
3. We will match your file
4. We will email you when matching is completed and your list is ready to use within a prospects order

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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 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   [Upload File ☁]

Important information

For data to be successfully matched to Credifsafe data 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

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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.

You will then be taken to the File Mapping screen. Map the data in your file to Creditsafe fields using the dropdowns provided at the top of each column.

90e7892b-8b0f-4e4d-232f-08d8bbc85f30_90e7892b-8b0f-4e4d-232f-08d8bbc85f301.xlsx File Mappings   ✕

File Mappings

☑ File contains header row   [Country * ▾]   [Cancel]   [Clear Mappings]   [Submit]

Company Name	Registration Number	Creditsafe Company ID	Address Line 1	City	Region	Country	Zip
___ ▾	___ ▾	___ ▾	___ ▾	Town ▾	Region ▾	Country Code ▾	Postcode ▾
STAFF-JIMUEL PENULIAR	0150320941	CA04138231	107 MOUNTAINVIEW 1	STONY MTN	MB	CA	R0C3A0
STAFF-PATRICK DALY	0150320976	CA04138233	878 HWY 6	ST FRANC XAVR	MB	CA	R4L1A3
STAFF-CAREY HILDEBRANDT	0150318793	CA04138296	113 BRYCE ST SUITE 6	WINNIPEG	MB	CA	R3L1X3
FELICHEETA ARTISTRY INC	0150330661	CA04138419	525 ST MARY AVE	WINNIPEG	MB	CA	R3C3X3
WILLIAM FLEURY	0150343437	CA04138491	PO BOX 1	MARQUETTE	MB	CA	R0H0V0
BARCO LTD	0150326893	CA04138682	3178 ASSINIBOINE AVE	WINNIPEG	MB	CA	R3K0B1
CLIFFORD PENNER	0150334446	CA04138794	RR 1	SWAN RIVER	MB	CA	R0L1Z0
VIBRATO FILMS INC	0150331919	CA04139035	834 CORYDON AVE SUITE 1	WINNIPEG	MB	CA	R3M0Y2
GYPSEY EXPRESS	0150326133	CA04139181	PO BOX 117	SEDDONS CORNER	MB	CA	R0E1X0
RONALD VAN DE WALLE	0150342252	CA04139335	PO BOX 181	CYPRESS RIVER	MB	CA	R0K0P0
ELISABETH SHARPER EDGE PROPERTIES	0150331552	CA04139366	31 CHENIER BAY	WINNIPEG	MB	CA	R3X1K3
WCC WINNIPEG CONDO CO	0150331560	CA04139367	PO BOX 1742	CARMAN	MB	CA	R0G0J0
CHANG LONG CO. LTD	0150325900	CA04139528	1200 PEMBINA HWY	WINNIPEG	MB	CA	R3T2A7
MC ROOFING & RENO'S LTD	0150325935	CA04139531	PO BOX 35	AMARANTH	MB	CA	R0H0B0
POINTS NORTH	0150325943	CA04139532	PO BOX 245	LEAF RAPIDS	MB	CA	R0B1W0

File

Personal Data

Company Information

Safe Number

Registration Number

VAT Number

Tax Code

Company Name

Trading Name

Alias Name

Previous Name

Telephone Number

Email Address

Company Address

Address Line 1

Address Line 2

Address Line 3

Town

Postcode

Region

Country Code

Company Name   Re

015
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WCC WINNIPEG CONDO CO   015

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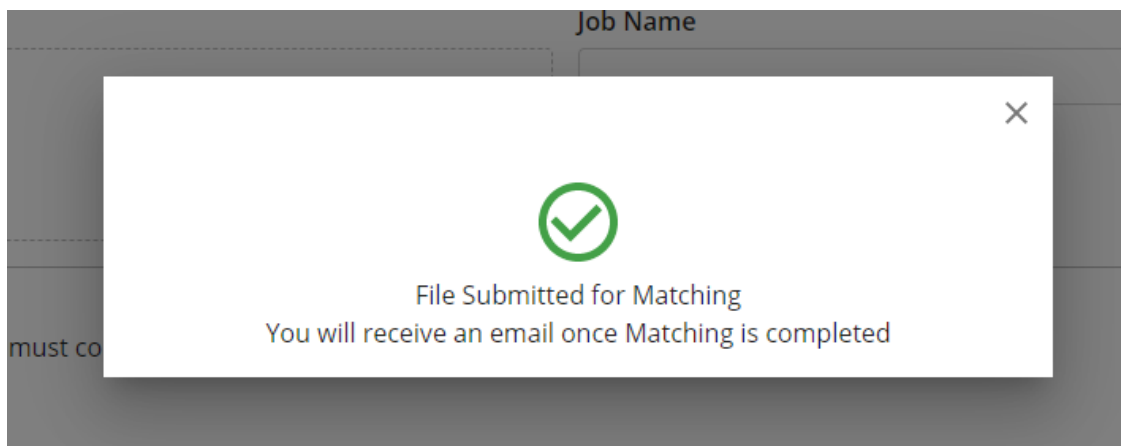
The Progress of your orders is displayed within the 'Previous Uploads' section of the Suppressions page.

Note: the below steps shown are for regions however the same steps can be carried out to exclude selected activity codes.

1. To exclude a region first you have to first select the region you want to exclude. In this example below if you want to exclude "Cardiff"., you must first select "Cardiff". At first the selection is faded out indicating that it is "not applicable", this is because you are already searching for the whole of "Wales", which is the parent location for Cardiff:

Countries and regions to search:

2. Once I have selected the region I want to exclude (e.g. Cardiff) it is possible to mark the location as an exclusion. This is done by hovering over the blue location 'chip' and selecting the exclude button that appears above it. :

Countries and regions to search:

Search Regions | Exclude location

Searching: United Kingdom ⊗ For: Wales ⊗ Cardiff ⊘ ⊗

3. Once selected the region is successfully "Excluded", the location moves to 'Excluding' the chip is greyed out and the location will be shown in red on the hierarchy search.

4. You can also re-include a region selected as excluded, as shown below:

Search Regions | Include Location

Searching: United Kingdom ⊗ Excluding: Cardiff + ⊗

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

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First prospect list
Prospect List

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

10

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		
🇬🇧 DIIVAAS 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.

View selected criteria | Suppressions | ⬇ Export Prospects

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

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.

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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 ⓘ	56102	Activity Description ⓘ	-

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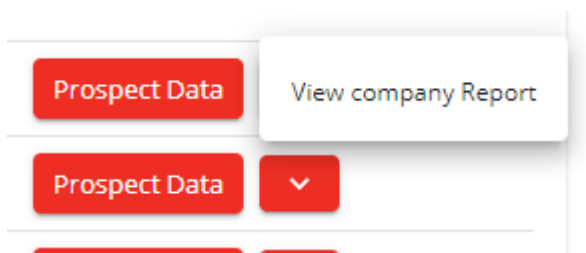
Note: orders placed on the old Prospects product have been migrated to the new tool. Viewing these orders is slightly different behaviour. The migrated orders will still appear on your Prospects Product Dashboard however you will not be able to benefit from viewing these from within our tool. When a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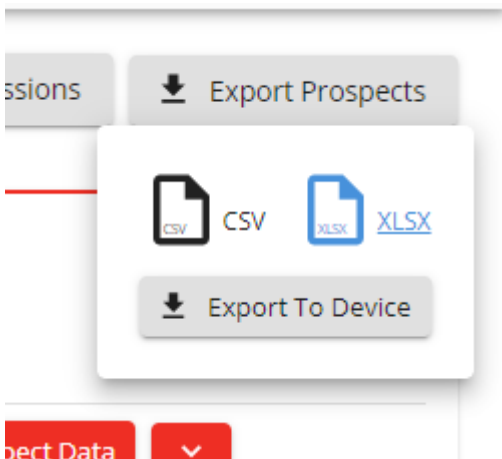
Export Order

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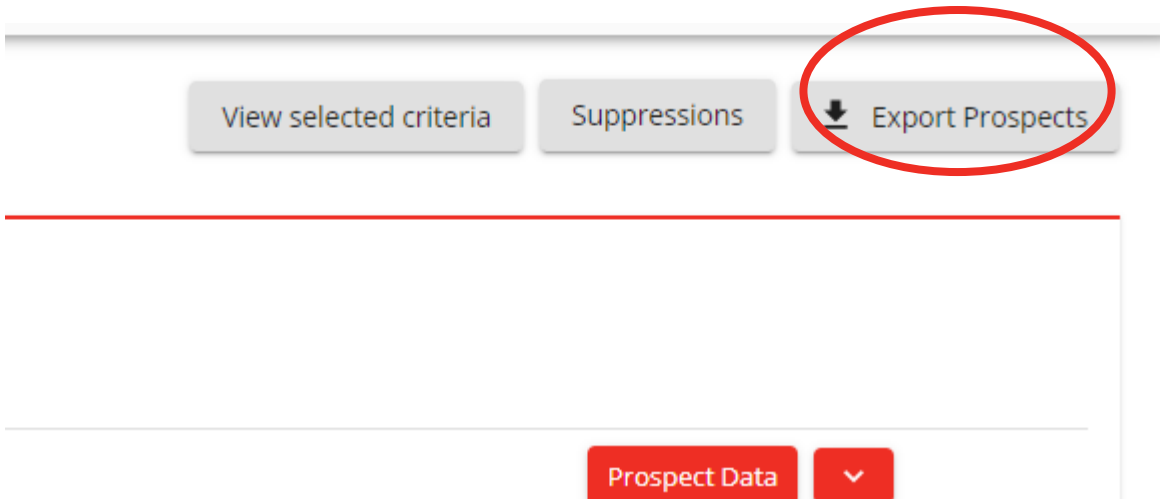
Once selected, you can then choose the file format you wish to download your order in. Once you have selected your chosen file format click 'Export To Device'. The file will then be downloaded to your device in your chosen format.

Export Translations

All exports can be translated into a user's chosen language (if allowed based on users supported languages).

Language is selected at time of order. Once the order has been confirmed the language of the export file cannot be changed.

Order

Name and Description

Order Name | Name

Order Description | Description

Note: Files available for export will use the selected language at the time of order confirmation

Confirm Order

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.

View selected criteria   Suppressions   ⬇ Export Prospects

Prospect Data ▾

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

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Selected search criteria ✕

Category	Criteria	Selection
Company Profile	Company Status	Active
Geographic	Countries	United Kingdom