LexisNexis® Prospect Portfolio
User Guide
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LexisNexis® Prospect Portfolio Overview

Increase your sales team’s productivity by leveraging Prospect Portfolio integrated within your salesforce.com application to supplement your account data and seamlessly generate and add new leads, according to your specifications.

You can use LexisNexis® Prospect Portfolio to:

- Create a list of companies or individuals—offering difficult-to-get direct contact information, including e-mail addresses and direct phone lines!
- Download results to Microsoft® Excel® or directly into your salesforce.com CRM application*
- Learn more about current clients or prospects including information on key business issues affecting their business.
- Use customized alerts to stay in-the-know on prospects and customers.
- Upload a list of your accounts or prospects and let Prospect Portfolio search them all at once to give you current and comprehensive company and contact information.
- Access Recent News module to find your own opportunities by searching over 26,000+ LexisNexis® premium news sources.

*Terms and conditions apply

Accessing and Integrating Prospect Portfolio for use in Salesforce.com

Follow these steps to obtain and activate Prospect Portfolio for use in Salesforce.com:

1. Talk to your LexisNexis account representative to obtain a subscription to Prospect Portfolio. If you do not have a LexisNexis account representative, please call LexisNexis at 1-800-227-4908.
2. Provide your LexisNexis® representative with your Salesforce.com OrgID (it’s an 18-digit code). This information allows our system to recognize the subscribers from your company, so that they can authenticate simultaneously for Salesforce.com and for Prospect Portfolio. If your company has multiple ORG IDs, LexisNexis will need to capture all of them.
3. When your order has been fulfilled, simply go to:
   
   https://login.salesforce.com/packaging/installPackage.apexp?p0=04t70000000YR2J
   
   and click Get it Now.
4. Fill in your name and click Next.
5. Consult our Implementation Guide for details on how to set up your account.
6. Users will be automatically logged into Prospect Portfolio when they log into Salesforce.com.
LexisNexis Display Within Salesforce.com

Your LexisNexis Prospect Portfolio will embed a new tab in your Salesforce.com application:

Within the Prospect Portfolio tab, there are 6 sub-tabs:

- **Home** – This tab includes easy access to list-generation and “Learn More” search forms. It also includes easy access, on the right-hand panel, to your saved Companies, People, Lists, and Recent News.
- **Create a List** – Create company and executive lists based upon criteria you select, derived from our database of over 80 million companies and 80 million executives.
- **Learn More** – Research specific companies, industries or executives.
- **Recent News** – Create customized news searches and leverage our sales Trigger categories to get the most relevant news.
- **Upload a list** – Upload up to 200 companies at a time (10 companies for executive lists) for fast, single-search results retrieval.
- **History and Alerts** – Save favorite searches and create alerts so you can stay in the know with breaking news on clients and prospects.
Custom Links Embedded in Accounts

Prospect Portfolio’s Mini-Widget allows you to see firmographic, hierarchy, financial, and executive information about a company directly on your Account tab for that customer. Prospect Portfolio also embeds 3 custom links into each of your account records to allow you to access additional business information to enhance your account record.

These three links include:

- **Update Account Detail** – Add LexisNexis details to your company record, including name, address, type (public or private), SIC/Industry, web site, ownership (public or private), phone and fax
- **Update Contacts** – link to a list of contacts for this company
- **Learn More** - link to a company profile for this company
Accounts Custom Link: Update Account Detail

This link allows you to update your existing account data or add new data. By clicking the link, you will see a list of your current Account details on the left, and the LexisNexis Prospect Portfolio details on the right. Use the checkboxes on the left to add the LexisNexis data or override your own. Click Update to confirm your selections.

The Account Record is now populated with accurate and current information.
Account Detail

<table>
<thead>
<tr>
<th>Account Owner</th>
<th>Rating</th>
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</thead>
<tbody>
<tr>
<td>Mr. Connor</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Account Name</th>
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<tbody>
<tr>
<td>Whole Foods</td>
<td>+1 512 477-4655</td>
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<table>
<thead>
<tr>
<th>Parent Account</th>
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<table>
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<td>[<a href="http://www.wholefoods.com">www.wholefoods.com</a>]</td>
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</table>

<table>
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<thead>
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</table>

<table>
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<table>
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<table>
<thead>
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<tbody>
<tr>
<td>550 Bowie Street</td>
<td></td>
</tr>
<tr>
<td>Austin, Texas 78703</td>
<td></td>
</tr>
<tr>
<td>UNITED STATES</td>
<td></td>
</tr>
</tbody>
</table>

<table>
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<tr>
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</table>

<table>
<thead>
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<th>SLA Expiration Date</th>
<th>SLA Serial Number</th>
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</thead>
</table>

<table>
<thead>
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<th>Number of Locations</th>
<th>Upsell Opportunity</th>
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</thead>
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<table>
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<tr>
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<table>
<thead>
<tr>
<th>Created By</th>
<th>Last Modified By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Connor</td>
<td>Mr. Connor</td>
</tr>
<tr>
<td>11/8/2011 12:28 PM</td>
<td>1/5/2012 12:05 PM</td>
</tr>
</tbody>
</table>

**Description:** Founded in 1978 and headquartered in Austin, TX, Whole Foods Market Inc. (NASDAQ: WFM) is a natural and organic foods supermarket. The company is one of the world’s top natural food chains, with about 300 stores throughout the US, Canada and the UK. Its offerings include produce, dairy, meat, seafood, along with dietary supplements, personal care products, household goods, and related educational products. The company carries organic, pesticide free and cruelty-free products in its line, with a focus on the sustainability of our entire ecosystem. The company had 2010 (FYE 08/31/10) revenue of about $8 billion and has about 54,000 employees.
**Accounts Custom Link: Update Contacts**

To retrieve a list of current executives for your account, use the Update Contacts Custom Link. On the left hand side, you will see the list of executives that you already have in your Account record. Use the checkboxes on the right hand side to select additional executives, or click “Select All” to retrieve all available records. Click Add to add the selected executives to your Account.

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**whole foods**

Select the contacts that you want to add to this account, then click Add.

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**Accounts Custom Link: Learn More**

Selecting the Learn More Custom Link will retrieve a company profile for the account record. These company profiles provide the most recent company overview, financials, news, parent/subsidiary relationships, legal information, competitive data and more. See additional description of the company profiles in the “Learn More” section later in this user guide.

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**Custom Links Embedded in Leads**

Prospect Portfolio embeds 2 custom links into each of your leads to allow you to obtain the most current business information available.
These two links include:

- **Update Leads Detail** – Add LexisNexis details to your lead, including name, address, type (public or private), SIC/Industry, web site, ownership (public or private), phone and fax
- **Learn More** - link to a company profile for this company

**Leads Custom Link: Update Leads Detail**

This link allows you to update your existing lead data or add new data. By clicking the link, you will see a list of your current Lead details on the left, and the LexisNexis Prospect Portfolio details on the right. Use the checkboxes on the left to add the LexisNexis data or override your own. Click Update to confirm your selections. This functions similarly to the Update Account Detail Link described above.

**Leads Custom Link: Learn More**

Selecting the Learn More Custom Link will retrieve a company profile for the lead. These company profiles provide the most recent company overview, financials, news, parent/subsidiary relationships, legal information, competitive data and more. See additional description of the company profiles in the “Learn More” section later in this user guide.
Custom Link Embedded in Contacts

Prospect Portfolio embeds a custom link into each of your contacts to allow you to obtain the most current business information available.

The custom link in your contacts is:

- **Update Contact Details** - Add LexisNexis details to your lead, including name, address, type (public or private), SIC/Industry, web site, ownership (public or private), phone and fax

*Contacts Custom Link: Update Contact Details*

This link allows you to update your existing contact data or add new data. By clicking the link, you will see a list of your current contact details on the left, and the LexisNexis Prospect Portfolio details on the right. Use the checkboxes on the left to add the LexisNexis data or override your own. Click Update to confirm your selections. This functions similarly to the Update Leads Detail Link described above.
Prospect Portfolio Functionality

This section describes Prospect Portfolio functionality that is available to all customers, whether accessing Prospect Portfolio as a stand-alone application or via Salesforce.com.

Create a List - Company

The Create a List tab allows you to create on-point target lists, based on the criteria you select. You can create either a list of companies or a list of people. Select the Companies radio button to display the form used to enter your criteria for generating a list of companies. Available criteria include: company type, (public or private), headquarters only, revenue, number of employees, company name, various location-based criteria, and industry. Select your criteria and click the Create Button.

Other options on the Create a List form:

- Currency conversion – You will see a currency conversion dropdown in the upper right. Use this to select the currency in which you want to search revenue. The dropdown defaults to US dollars, and it includes Australian dollars, British pounds, Canadian dollars, Euros, and Japanese yen, as well as an “as reported” option.
- SIC and NAICS lookup tools – If you do not know the SIC or NAICS code for your desired industry, use these tools to browse for particular industries or enter industry keywords.
To create a prospecting list, specify the attributes of the companies or people you are looking for, then click Create.

**Create a List of...**

- **Company Type**: All Companies
- **Currency Conversion**: US Dollars (USD)

**Clear Form**

- **Company Type**: All Companies
- **Sales/Revenue**: Above
- **Employees**: From
- **Search**: Business Description
- **Company Name**: 
- **Ticker**: 
- **Dossier ID**: 

**Regions/Countries**
- **United States**: Select Multiple

**States**
- **All States**: Select Multiple

**Cities**

**ZIP Codes**

**Tip**: Use commas to search for multiple items, e.g., goog, ibm or 1034028, 1015050.

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**SIC Code**
- **Search Primary SIC Codes**
- **Search Primary & Secondary SIC Codes**

**NAICS Code**
- **Search Primary NAICS Codes**
- **Search Primary & Secondary NAICS Codes**

**Create**
After entering your criteria and selecting the Create button, a preview of your Company List results is provided. Select the hyperlink to open any of the sample companies. Upon previewing, you can select Edit Search link to fine tune your search, if desired. When you are satisfied with your search, select the red Next: Customize List button at the top right side of your screen.

The Customize Your Company List screen allows you to customize the elements to be included in your company list. On this screen you can also select how many results to download, and you can determine the sort order of the results. Once you have selected your desired options, click the red Update Company List button at the bottom of your screen.
The Your Company List – Results screen displays your customized results list. Functionality on this screen includes:

- **Edit search** – Click this link to revise your search criteria
- **New search** – Click this link to start a new search
- **Save search** – Click this link to save your search as a template for your future searches
- **Customize** – Click this link to revise the fields that display in your list.
- **Company names** - Click on a company name to obtain a profile of that company.
- **Downloading** – Check the boxes next to the company names whose records you wish to download. After selecting your desired companies, click Download Selected Items to continue.

After clicking Download Selected Items, your results will download to an Excel spreadsheet.

**Create a List - People**

From the Create a List tab, select the People radio button to create a list of executives based upon your desired criteria. The Create a People list form includes all of the same criteria and functionality as on the Create a List – Company form (as shown above. It also includes criteria for job specialty (e.g. Human Resources) and for job function, which relates to the level of seniority (e.g. Director). Select one or all specialties and functions from the respective drop-downs, or click “select multiple” to choose multiple specialties or multiple functions. Select your criteria and click the Create Button.
After entering your criteria and selecting the Create button, a preview of your People List results is provided. Select the hyperlink to open any of the sample companies. Upon previewing, you can select Edit Search link to fine tune your search, if desired. When you are satisfied with your search, select the red Next: Customize List button at the top right side of your screen.
The Customize Your List of People screen allows you to customize the elements to be included in your people list. On this screen you can also select how many results to download, and you can determine the sort order of the results. Once you have selected your desired options, click the red Update Executive List button at the bottom of your screen.

The Your People List – Results screen displays your customized results list. Functionality on this screen includes:

- Edit search – Click this link to revise your search criteria
- New search – Click this link to start a new search
- Save search – Click this link to save your search as a template for your future searches
- Customize – Click this link to revise the fields that display in your list.
- People names - Click on a person’s name to obtain news or reports on that person. (see more detail below)
- Downloading – Check the boxes next to the people names whose records you wish to download. After selecting your desired people, click Download Selected Items to continue. (see more detail below)
- LinkedIn integration – Click on the icon next to each person’s name to search for that person within LinkedIn.
**Clicking on a Person’s Name:**

When you click on a person’s name, you are brought to a screen to confirm which types of news and reports you wish to obtain on that person. Choose from executive profiles, news, negative news, SEC filings, Congressional testimony, US case information, or Commonwealth and Irish case information. Make your selections and click Find.

Your results appear on the next screen. Choose from different sources (e.g. executive profiles, news, etc) by clicking your desired option on the left.
**Downloading a List of People**

From the Your List of People – Results page, click the checkboxes to select the people you wish to download and click Download Selected Items. You will have the choice to download your results to an Excel spreadsheet, to import them directly into your Salesforce.com Leads, or directly into your Salesforce.com Contacts.

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**Download List**

**Download your list of people to:**

- [ ] A Microsoft Excel spreadsheet
- [ ] Salesforce.com Leads
- [ ] Salesforce.com Contacts

Download delivery is subject to [Terms & Conditions](#). Please review them.
Learn More – Company

The Learn More Tab allows you to research a specific company, person or industry. To view a company profile, enter the name of the company, a ticker symbol, DUNS number or any other criteria, and click Find.

Company Profiles

Through the Learn More Tab, you'll have access to comprehensive profiles on over 80 million private and public companies including company overviews, executives, key financials, family trees, analyst reports, cases, intellectual property, current business news from 26,000+ leading news providers, and more. Sources and load date are clearly displayed and you can easily navigate to the full document by clicking the source. You can also add documents to the print/email/download delivery cart by checking the little green box to the left of the name of the source. All the documents you select will then be compiled. Download options include the ability to create a PDF report, complete with an auto generated table of contents with hyperlink navigation.
Key attributes of the company profile on the left hand panel:
- Access the latest news about the company under Current News
- Obtain a list of Executives at the company
- Find parent/subsidiary relationships under Company Hierarchy
- Under Financials, view financial reports, mergers & acquisitions, research and analyst reports, SWOT Analysis and other company reports provided by the most prestigious names in business information
- Under Legal, find recent U.S. case law, Commonwealth case law, Mealey’s™ Reports, Martindale-Hubbell® outside counsel and LexisNexis® CourtLink® strategic profiles
- Under Intellectual Property, see domestic and foreign patents, recent state, federal and international trademarks, and recent U.S. copyrights

Company Alerts
To create an alert on a company, click the Create Alert link at the top of the company profile.
On the Create Alert page, you will see the following functionality:

- **Type of Alert** – Choose the type of content that you want to be alerted on for your desired company. Content types include news, financial, legal, and intellectual property information.
- **Name of alert** – Provide a name for your alert so that you can easily reference your alert later.
- **Additional terms** – Narrow down your alert by adding specific terms that are of interest to you. For example, add the term earnings to get articles related to earnings reports on your desired company.
- **Triggers** – Select from the 18 trigger categories. These categories represent events that are likely to represent a selling opportunity or a risk to a current customer. Monitoring trigger events associated with your customers and prospects will help you be the first to know when there might be a new sales opportunity.
- **Schedule alert** – Choose the time and frequency with which you’d like to receive your alert.
- **Method of delivery** – Choose email delivery to have the alerts sent to you. Choose view online only to have the results available only within your Prospect Portfolio tool (on the History and Alerts tab).
- **Results format** – Choose whether you want your alert results delivered as an expanded list, or with the full articles.

Enter your desired criteria and click Save to schedule your alert.
Learn More – Person

The Learn More Tab allows you to research a specific company, person or industry. To view a person report, enter relevant criteria in the Learn More About a Person fields, select your sources, and select the Find button. Sources include Executive Profile information, News, Negative News, SEC Filings, Congressional Testimony, and Case information.
Executive Profiles

After clicking Find, you will get to the Executive Profiles results screen. If desired, narrow down your results on the left hand panel.
People Alerts
To create an alert on a person, click the Create Alert link at the top of the executive profiles page.

On the Create Alert page, you see functionality similar to the functionality for Company Alerts, described above. Enter your desired criteria and click Save to schedule your alert.
Learn More – Industry

The Learn More Tab allows you to research a specific company, person or industry. To retrieve information on over 1,100 industries with a single search, you can enter keywords or SIC codes to find the industry. Enter your desired terms and click Find.

If you do not know the SIC code of your desired industry, use the SIC lookup functionality next to the SIC search code box. The SIC lookup tool lets you search industries by keyword or by browsing.
Industry Profiles

After clicking Find on the Learn More about an Industry form, you will get to the Industry Profiles results screen. Choose from different reports and news options on the left hand panel. Content includes:

- **Snapshot**: Concise industry overview that can include industry overview, top companies by sales, ratio components, and market performance indicators
- **Recent News**: Recent news related to the industry
- **Integra**: View a detailed industry balance sheet
- **Datamonitor Reports**: Industry Reports by country include competitive landscape, leading companies, even forecast value
- **Mergers**: Find information about the top mergers (by price offered)
- **Legislative Information**: Browse recent U.S. Congressional bills that pertain to the industry

Industry Alerts

To create an alert on an industry, click the Create Alert link at the top of the industry reports page.

On the Create Alert page, you see functionality similar to the functionality for Company Alerts, described above. Enter your desired criteria and click Save to schedule your alert.
Recent News

For those times when you want to research specific topics in the news, this optional module provides you with quick and easy access to the LexisNexis vast database of over 26,000 news sources directly from the Prospect Portfolio interface.

Enter your desired search terms and/or click on the pre-defined trigger categories to search news related to trigger events likely to represent a sales opportunity. Click Search to run your search.
After clicking Search, you will get to the news results screen. If desired, narrow down your results on the left hand panel. Click on the article headline to see the full-text of the article.

Upload a List
Enter or upload a list of clients or prospects for fast, single-search results retrieval. You can enter up to 200 ticker symbols/D-U-N-S® numbers/DossierIDs (for a list of companies) or 10 ticker symbols/D-U-N-S® numbers/Dossier IDs (for a list of executives). Your entries must be separated by commas. Or, upload a list in TXT or CSV (spreadsheet) format. After entering your desired companies, select whether you want a list of companies or executives, and click Retrieve.
Your results will appear in a list, with similar functionality to what is described above for creating company and people lists.

History & Alerts

This tab allows you to see your recent Prospect Portfolio activity (History), your Saved Searches, and the Alerts that you have set up. The History area displays activity from the past 30 days.

Additional Assistance

Online Help

Access online context-sensitive help available anywhere you see this icon:  

Customer Support

The world-class LexisNexis customer support team is available 24 hours a day, 7 days a week to assist you with any questions you may have. For toll-free assistance, call 1-800-227-4908