D&B Business Browser

User Guide

Contents

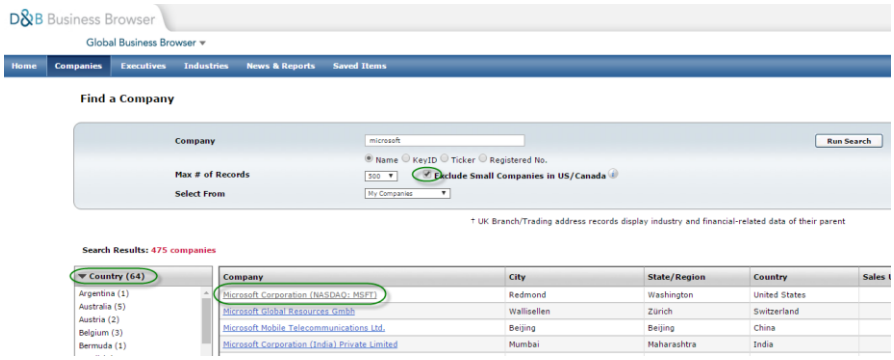
D&B Business Browser

The primary factor of differentiation between the D&B Business Browser and D&B Hoovers products relates to the Advanced Financial Analysis in Business Browser. Other differences relate to Industry Search, Industry Browse, US Government Search and some of the available reports in Business Browser.

D&B Business Browser allows for a comparison of up to the 5 most recent years of financial data with the Advanced Financial Analysis Custom Table where the D&B Hoovers product allows for comparison of only the most recent year financial data.

Search for a Target Company

Search for a company in the Quick Search section by typing the desired company name. Use an asterisk if you are unsure of the exact spelling; i.e.: micros* for Microsoft. The next page will display the list of companies matching your criteria. Each hyperlink represents a company profile which contains additional information for that particular location.



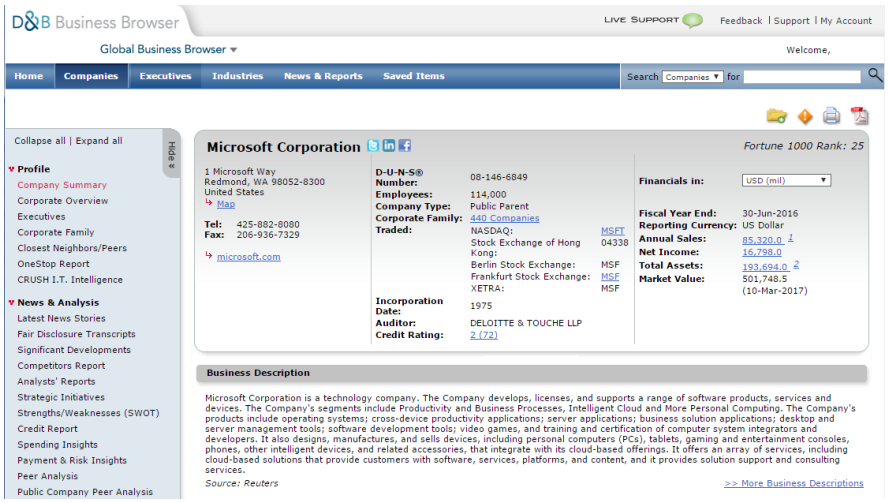
Tip: *Use the **Refine Search** filter on the left side of the results Page to narrow the search. If 0 results are found, uncheck the **Exclude Small Companies** box and click Run Search. This will expand your search by including the small companies subset with companies under $.5M in sales or fewer than 5 employees.*

Researching a Target Company

Click on the specific company hyperlink from the Search Results Page. The Company Summary Page will be displayed.

The right side of the page will display important company information such as address, website, phone #, sales size, employee count, business description and linkages to the Industry Research module.

The left side of the page contains a series of hyperlinks which represent available company reports. The next section of this guide will highlight some of these reports in more detail.



Tip: *The number of available reports in the left hand menu will depend on the size and ownership type of the company.*

Available Company Reports

Collapse all | Expand all

Hide »

- **Profile**
  - Company Summary
  - Corporate Overview
  - Executives
  - Corporate Family
  - Closest Neighbors/Peers
  - OneStop Report
  - CRUSH I.T. Intelligence
- **News & Analysis**
  - Latest News Stories
  - Fair Disclosure Transcripts
  - Significant Developments
  - Competitors Report
  - Analysts' Reports
  - Strategic Initiatives
  - Strengths/Weaknesses (SWOT)
  - Credit Report
  - Spending Insights
  - Payment & Risk Insights
  - Peer Analysis
  - Public Company Peer Analysis
  - Company Chartbook(Excel)
  - Valuation Tearsheet (Excel)
- **Filings**
  - SEC Filings
  - Annual Reports
- **Financials**
  - Financial Report (Morningstar)
  - Financial Health
  - Ratio Comparisons
  - Annual Ratios
  - Stock Report
  - Geographic Segments
  - Business Segments
    - Income Statement
      - Annual (Morningstar)
      - Interim (Morningstar)
    - Balance Sheet
      - Annual (Morningstar)
      - Interim (Morningstar)
    - Cash Flows
      - Annual (Morningstar)
      - Interim (Morningstar)

Corporate Overview: In-depth business descriptions, brand & trade names, summary financial information.

Executives: Displays a listing of key executives at all levels and is exportable to Excel. Links to executive biographies including Web biographies which reference executive Web sightings. In many cases these Web biographies include email addresses. Look for the LinkedIn icon to identify executives within 3 degrees of your personal LinkedIn profile.

Corporate Family: Displays the corporate hierarchy of ownership for subsidiaries & branches associated under the same corporate umbrella. Hyperlinks will lead to other Company Summary pages.

Recent or pending merger & acquisitions and joint ventures are highlighted in red with links to news and articles related to corporate structural changes.

Closest Neighbors/Peers: Displays closest neighbors and peers from the physical address of the company being researched. Great for identifying potential opportunities and competitors when location is a critical factor. For example, a regional bank can use their bank location address to determine potential customers within a 100 mile radius. Additional custom reporting can also be generated from the displayed results.

OneStop: Allows users to consolidate multiple reports into a single report.

Peer Analysis: Screening function to help identify the target company's closest peers/competitors. Compare by industry, SIC Code, sales, employees or asset size.

Filings: (SEC filings & Annual Reports) Table of contents of the 8Ks, 10Qs, 10Ks, S Registrations, 14As and 20F filings submitted in the last 12 months. (*Global Public*)

Financial Health: Qualitative report listing key indicators, margins, ratios and Stock Price Data for all public companies. (*Global Public*)

Financial Statements: Annual & Interim Income, Balance & Cash Flow statements covering up to 10 years & 16 quarters. All are exportable to Excel. 'Reuters' version provides a standardized format to simplify comparables. 'As Reported' for original filing without line item roll-ups. Contains a glossary of financial terms for reference. (*Global Public*)

(*Global Public*) Indicates that the report is typically only available for a publicly traded company

Building a Target List of Companies

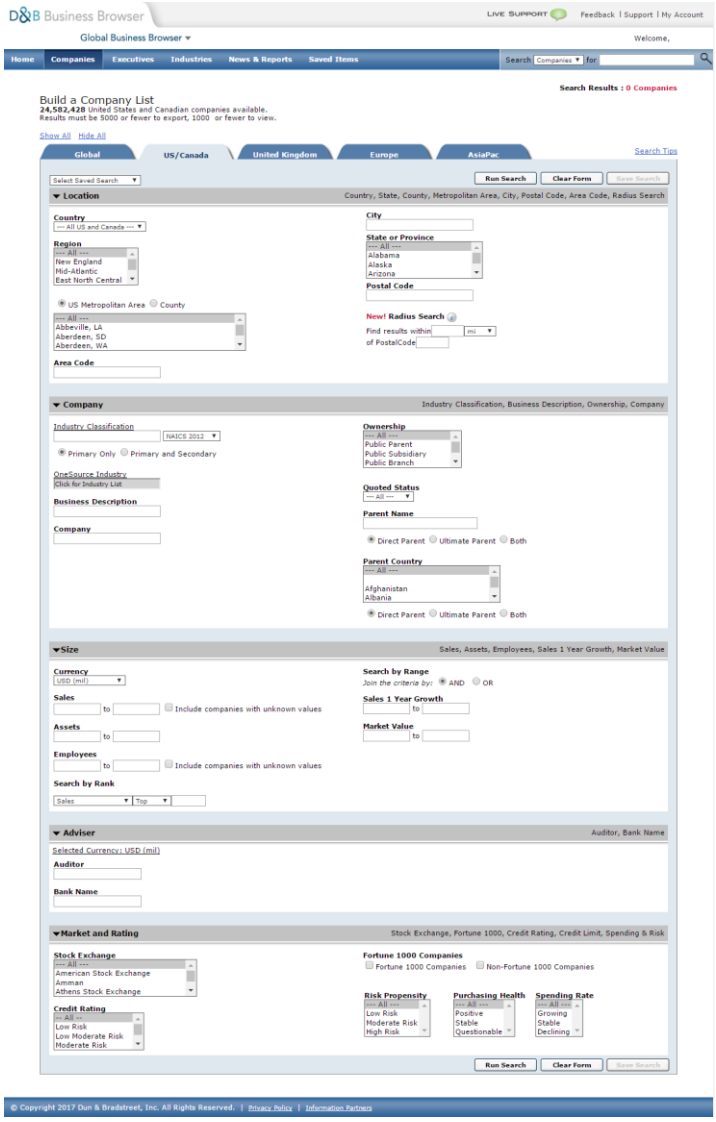
Select **Build a List** from the Companies drop down at the top of every page to identify companies that meet your criteria.

The Search Variable Page will now appear. Users that subscribe to multiple geographies will see several tabs across the top of the page. To search across all licensed geographies use the **Global** tab to the far left. Otherwise choose the specific geography that you wish to focus your search around.

Defining your Company Search Variables

There are 5 groups of variables to conduct company Searches: **Location, Company, Size, Adviser and Market & Rating**. Each set contains multiple variables to narrow your desired results.

Select all required variables and click **Run Search** in the upper right hand corner of the Page. You can also save your criteria set by clicking **Save Search.** Retrieve previously saved searches by using the **Select Saved Search** dropdown in the upper left corner.



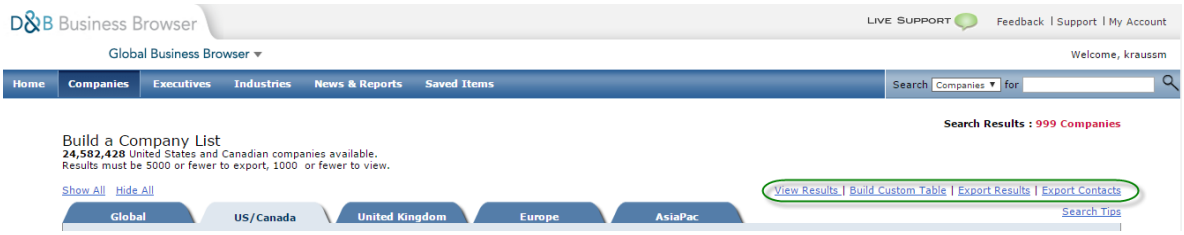
***Tip**: Be mindful of the criteria used for searching. i.e. using sales growth or market will only yield results for publicly traded companies.*

*Use the **Search Tips** link in the upper right hand corner to achieve your desired results.*

Up to 1,000 result records can be viewed and up to 5,000 can be exported. These limitations can be avoided by using additional build two lists using selected Regions or groups of Industries.

Creating Reports with Search Results

Once all required variables are entered and Run Search results are less than 5,000 records, 4 reporting links will activate in the upper right hand corner.



View Results: available only if search results are less than 1,000.

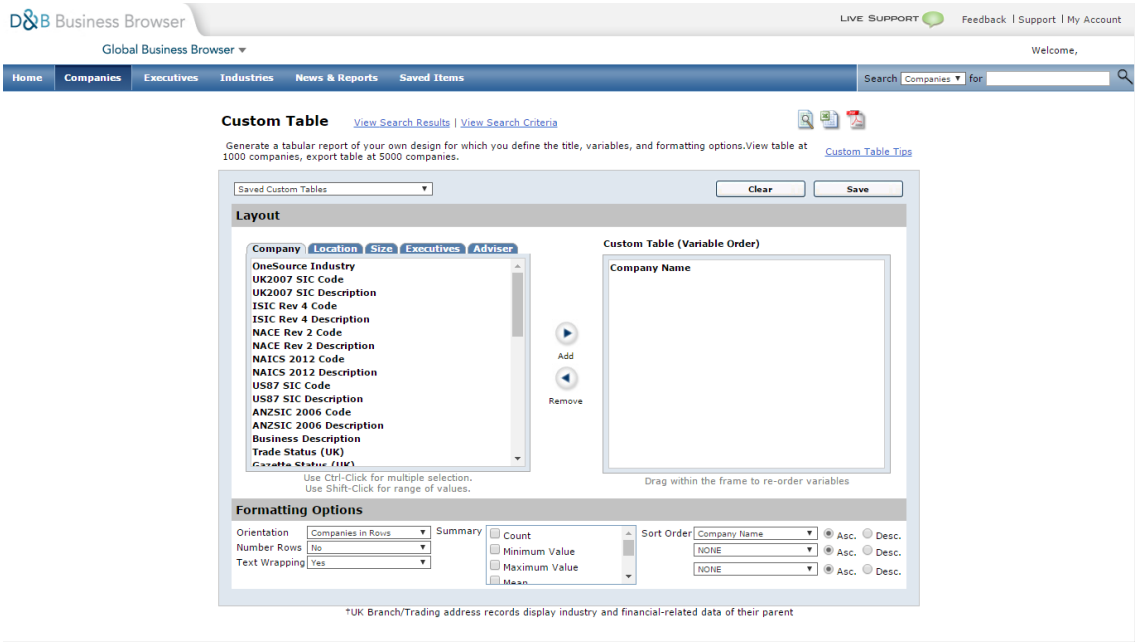
Build Custom Table: links to a menu containing over 100 unique variables which can be exported into a custom report. See below.

Export Results: creates a pre-populated report in Excel for up to 5,000 companies displaying key variables such as location, sales, assets and ownership.

Export Contacts: links to an executive export menu containing over 60 specific job functions. Users can also search by job title.

Building a Custom Table

Locate the 5 tabs under the Layout section. Each tab contains a list of variables which can be included in your table. To select a variable simply click on the desired field and then click the **Add** arrow to the right. The variable will now appear within the right frame.



Once all desired variables have been selected users can **Save** the report for later use. Use the **Saved Custom Tables** dropdown to access previously stored report formats.

To generate your report containing your desired variables on the target companies click on the m**agnifying Glass** icon to view in your browser or use the **Excel icon** in the upper right hand corner to export.

> ***Tip:*** *To change the location of a particular variable in your report prior to exporting, click on the specific variable in the right pane and move up and down the chain.*
>
> *Selecting Magnifying Glass icon will launch a menu with additional reports which includes a Quicklist and Company Reports that allow users to generate multiple reports such as Executives and Corporate Family.*

Building a Target List of Executives

Select **Executives** from the main navigation bar to identify key business decision makers or enter a name in the Quick Search for Executives to find a specific contact.

The Search Variable Page will now appear. Users that subscribe to multiple geographies will see several tabs across the top of the page. To search across all licensed geographies use the **Global** tab to the far left. Otherwise choose the specific geography that you wish to focus your search around.

Defining your Executive Search Variables

There are 5 groups of variables to conduct executive Searches: **Executives**, **Location, Company, Size, Adviser & Market**. Each set contains multiple variables to narrow your desired results.

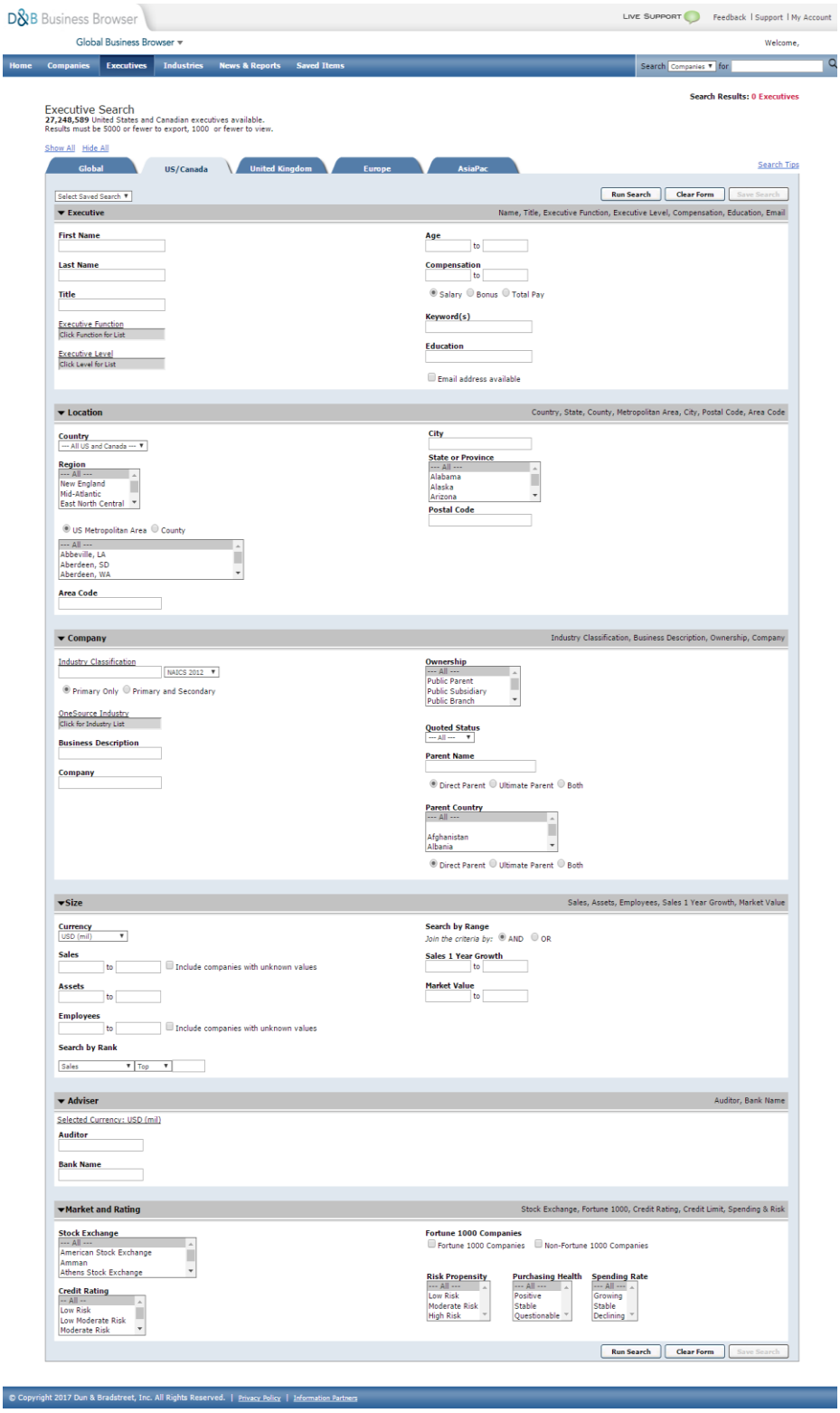
Select all required variables and click **Run Search** in the upper right hand corner of the page. You can also save your criteria set by clicking **Save Search.**

Retrieve previously saved searches by using the **Select Saved Search** dropdown in the upper left corner.

Tips: *Be mindful of the criteria used for searching. i.e. using sales growth or market will only yield results for publicly traded companies.*

*Use the **Search Tips** link in the upper right hand corner to achieve your desired results. Up to 1,000 result records can be viewed and up to 5,000 can be exported. These limitations can be avoided by using additional variables i.e. build two lists using selected Regions or groups of Industries.*

Use of the biographical data points such as age & salary will limit your search exclusively to executives with Thomson Reuters biographies.



Industry Research

Industry research provides critical insight into a company's business climate. Whether trying to understand a client or prospect's industry to leverage your company's value proposition or using the information to educate potential candidates in the recruiting industry, this valuable perspective will help in your research.

There are 3 ways to access the Industry Research module.

1. From the **Quick Search** text box on the product homepage
   OR
2. By clicking on the **Industries** link at the top of any page. The **Industry Search** option provides the ability to search by industry activity or by industry description. The **Industry Browse** option presents a hierarchal view of the various industry classifications with the ability to expand and collapse across the industry family tree. This view also displays the various related industry activities.
   OR
3. From within **Company's Summary,** click on the Industry description located within the Industry section. This will open the Industry summary page described in the section below.

***Tip**: To ensure the best results, use an Asterisk * or Wildcard (shift 8 key) when searching across descriptions and activities. i.e. Biotech* will return results like Biotechnological*

Industry Summary Page

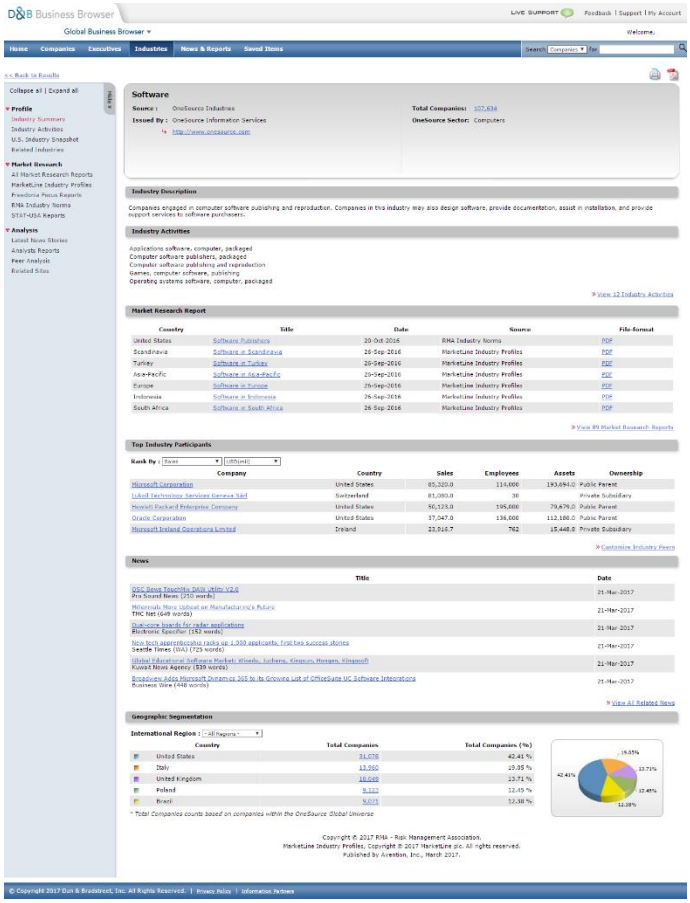
The Industry Summary Page displays a brief description of the industry in addition to a listing of the associated **Activities** across the various lines of business. The **Industry Family** link will display a hierarchal view of the various classifications that comprise the industry.

This module also includes links to 3rd party **Related Sites** applicable to the industry as well as a listing of **Industry Trend** articles, and links to the **Top Participants**.

Use the **Market Research** & **Analyst Report** links located in the upper right hand corner to gather additional intelligence such as trends, forecasts, SWOT analysis and top participants.

When available, a **Geographic Segment** graph will display the % of total companies by region across the entire OneSource dB.

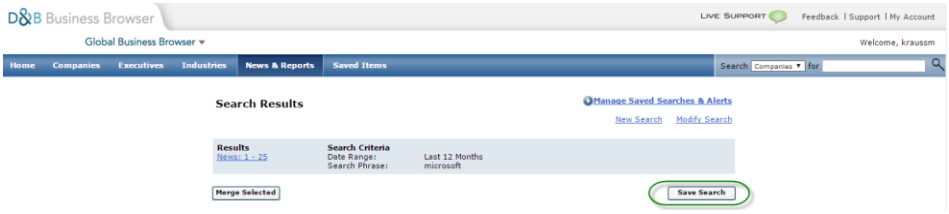
When using the OneSource industry classifications the **RMA Industry Norms** report will appear in the report menu under the Market Research header. This report provides benchmark financial statements for US private companies within the industry sorted by sales size.



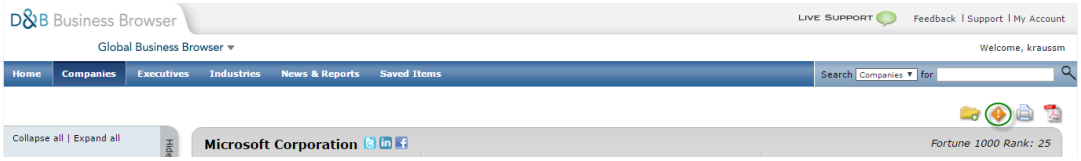
Creating an Alert

There are 3 ways to create an Alert.

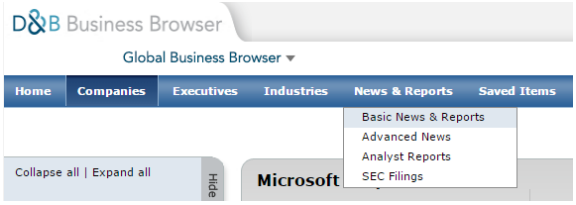
1. By using the **Save Search** link on the results screen during a News & Articles search



2. By clicking on the **Alert** icon in the upper right corner from within a Company Summary page



3. By clicking on the **New & Reports** tab at the top of any page.



   a. Choose from **Basic News & Reports, Advanced News and Analyst Reports** from the dropdown list.
   b. For **Basic News & Reports** enter search terms or company names of interest.
   c. For **Advanced News** use the Company, Business Topic, Industry and Geography tabs to specify your topics and companies of interest.
      i. Select the appropriate item and click **Add To Search** to populate the **Preview** pane.
      ii. Use the **And, Or, Not** buttons under the Preview Pane to broaden or narrow your criteria.
   d. For **Analyst Reports** specify terms for Title, Full Text, Broker, Company or Industry.
   e. Use **Save Search** to save any of the results and select **Save as an Alert**.

Add **Free Text Keywords** to help narrow your results further.

Tips:

- *Use the Search Tips at the top of the Page for help in crafting your search.*
- *Use the Headline button next to the Free Text Keyword box to require certain words or phrases to appear in the headline of the article.*
- *Use quotation marks to require certain words or phrases to appear in succession i.e. "initial public offering".*
- *If your search yields no results, try removing topics to broaden your requirements.*

Advanced Financial Analysis

The Advanced Financial Analysis provides an option for Global Public Companies comparison and with the UK content set an option to compare approximately 500,000 additional UK company records.

The Advanced Financial Analysis provides financial analysis tools to finance, investment, and accounting professionals. Advanced Financial Analysis delivers company valuation, financial reports, comparables analysis, and Excel charting tools.

All tools are integrated into Business Browser, so users can quickly perform financial analysis and corporate research via a single company lookup. Reports can be viewed in Business Browser, downloaded to Excel or printed in PDF format.

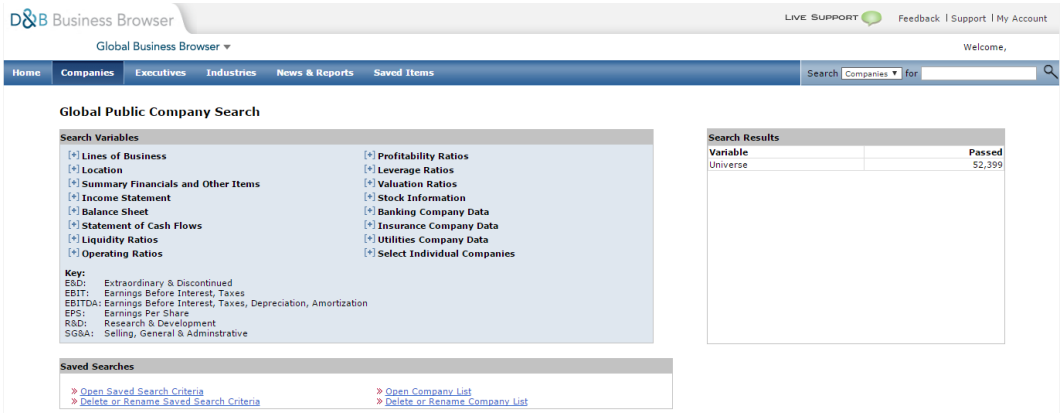
There are eight different Advanced Financial Analysis Functions/Reports:

- Annual Ratio Report
- Stock Price History
- Public Company Peer Analysis
- Company Chartbook
- Valuation Tearsheet
- Comparables Model
- Comparative Financials
- Global Public Company Screening

Within Advanced Financial Analysis there are over 150 financial variables that can be used to compare companies.

Selecting any of the categorized variables prompts for additional actions based on Most Recent Annual Data, Data Range, Variable Rank, Growth Rate and some variables covering Most Recent Quarterly Data for Global Public Companies.

Some financial variables are only available for US companies and include Most Recent Quarterly Data and Last Twelve Months data.



After selecting the financial variables desired select Run Reports to generate reports for the selected criteria. Options for reports include:

- **Public Quicklist**
  - Provides net sales, total assets, market capitalization, and number of employees for your companies, ranked by sales.
  - Results must be less than 5000 for Excel export and less than 1000 to view results.
- **Custom Table**
  - Generate a tabular report of your own design for which you define the title, variables and sort order.

    - From the Business Browser Advanced Financial Custom Table you can select up to 1000 companies and provide up to 5 years of financial variables to compare.
    - Results must be less than 1000.
- **Comparables Model (Excel)**
    - Select a subject company, and compare the subject company to the other companies in your Company List. (US Companies only). Results are in Excel format.
    - Results must be 450 or less and a maximum of 10 companies can be compared.
- **Comparative Financial Statements**
    - Compare up to 255 companies using these financial statements in your browser.
        - Annual Income Statement (Excel)
        - Interim Income Statement (Excel)
        - Annual Balance Sheet (Excel)
        - Interim Balance Sheet (Excel)
        - Annual Statement of Cash Flows (Excel)
        - Interim Statement of Cash Flows (Excel)
- **Export for Mailing Labels or Contact Manager**
    - Create an Excel or text file for use with mailing or contact management software.
- **Single-Company Reports**
    - Select a report (such as Company Summary or Executives) that you want to view for two or more companies in your list on the same page.
    - Maximum of 25 companies at a time.

Options to **Save Company List**, **Save Search Criteria** and **View Company List** for editing (must be less than 500 companies) are also available in addition to **Remove Last Criterion** and **Clear All Criteria**.