



## How to Select Specific Titles to Receive One Business Record with One Title

**The same logic can be applied for GCA contacts as well as regular contacts.**

This guide provides directions on **How to make selections of specific titles, and receive one DUNS numbered business with one title.** Additionally you will be able to prioritize the titles. You can select several key decision makers and prioritize the order of titles you want to target. For instance: Vice President of Marketing then Vice President of Sales and Marketing and last Chief Marketing Officer. You can put them in that order where Market Insight will first look for Vice President of Marketing where there is no Vice President of Marketing at a company it will source for the next selected title.

The end result of this exercise will return one marketable site record in the states of either New York or Connecticut with sales of 500 thousand or over and one of the following three contacts. It will search for these contacts in the following order.

Vice President of Marketing  
Vice President of Sales and Marketing  
Chief Marketing Officer

If it finds the first title it will stop. If not it will go to the second and then to the third if necessary.

To accomplish this follow these directions.

For this example we will use the GCA contacts. We will use the following criteria the states of New York and Connecticut with 500 thousand or greater in sales and a marketable record.

You will want to start on the GCA Contacts Table. Then bring into your selection the GCA primary MRC code

The screenshot displays a software interface with a tree view on the left and a selection window on the right. The tree view lists various GCA fields, with 'GCA Primary MRC Code' highlighted. The selection window, titled 'New Selection 8', shows a list of selections, with 'GCA Primary MRC Code' selected. Below this, a table titled 'GCA Primary MRC Code' lists various codes and descriptions. The table has columns for 'Include', 'Code', and 'Description'. The row for 'A0A1 Owner (A0A1)' is highlighted. The bottom of the interface shows 'System Tables' with 'OnB Market Insight - v4' selected.

Include	Code	Description
<input type="checkbox"/>	I	Unclassified
<input type="checkbox"/>	A045	Incorporator (A045)
<input type="checkbox"/>	A046	Joint Venturer (A046)
<input type="checkbox"/>	A047	Shareholder (A047)
<input checked="" type="checkbox"/>	A0A1	Owner (A0A1)

Next you will want to include the three MRC codes you are looking for. You can do this as follows. In the following box start typing your first title which is Vice-President Marketing. When the title appears check the box. Now do the same for the remaining two titles.

New Selection 8

New Selection 8

GCA Contacts

Notes

View Settings

Selection \*

New Selection 8

GCA Primary MRC Code of Vice-President Marketing (I5F2)

GCA Primary MRC Code

Filter

Description C

vice-presid

GCA Primary MRC Code

Include	Code	Description
<input type="checkbox"/>	B5F4	Vice-President Merger Acquisition (B5F4)
<input type="checkbox"/>	H5F1	Vice-President Manufacturing (H5F1)
<input type="checkbox"/>	I5A1	Executive Vice-President Marketing (I5A1)
<input checked="" type="checkbox"/>	I5F2	Vice-President Marketing (I5F2)
<input type="checkbox"/>	I5F3	Vice-President Merchandising (I5F3)

Now choose the rest of your criteria such as the states and sales volume and marketability indicator.

New Selection 8

New Selection 8

GCA Contacts

Selection \*

New Selection 8

GCA Primary MRC Code AND GCA Contacts having THE Site with State AND Sales Volume US AND Marketability Indicator

GCA Primary MRC Code of Vice-President Marketing (I5F2) or Vice-President Sales and Marketing (I599) or ...

AND THE GCA Contacts having THE Site with State AND Sales Volume US AND Marketability Indicator

State AND Sales Volume US AND Marketability Indicator

State of NEW YORK or CONNECTICUT

AND Sales Volume US of >=500000

AND Marketability Indicator of Marketable Record

Marketability Indicator

Filter

Description C

Include	Code	Description	Sites
<input type="checkbox"/>	A	Non-Marketable – Undeliverable Address or Unable to Confirm	1,599,240
<input type="checkbox"/>	D	Non-Marketable - De-listed Record	996,823
<input checked="" type="checkbox"/>	M	Marketable Record	87,146,733
<input type="checkbox"/>	O	Non-Marketable - Out Of Business	9

Include

OR

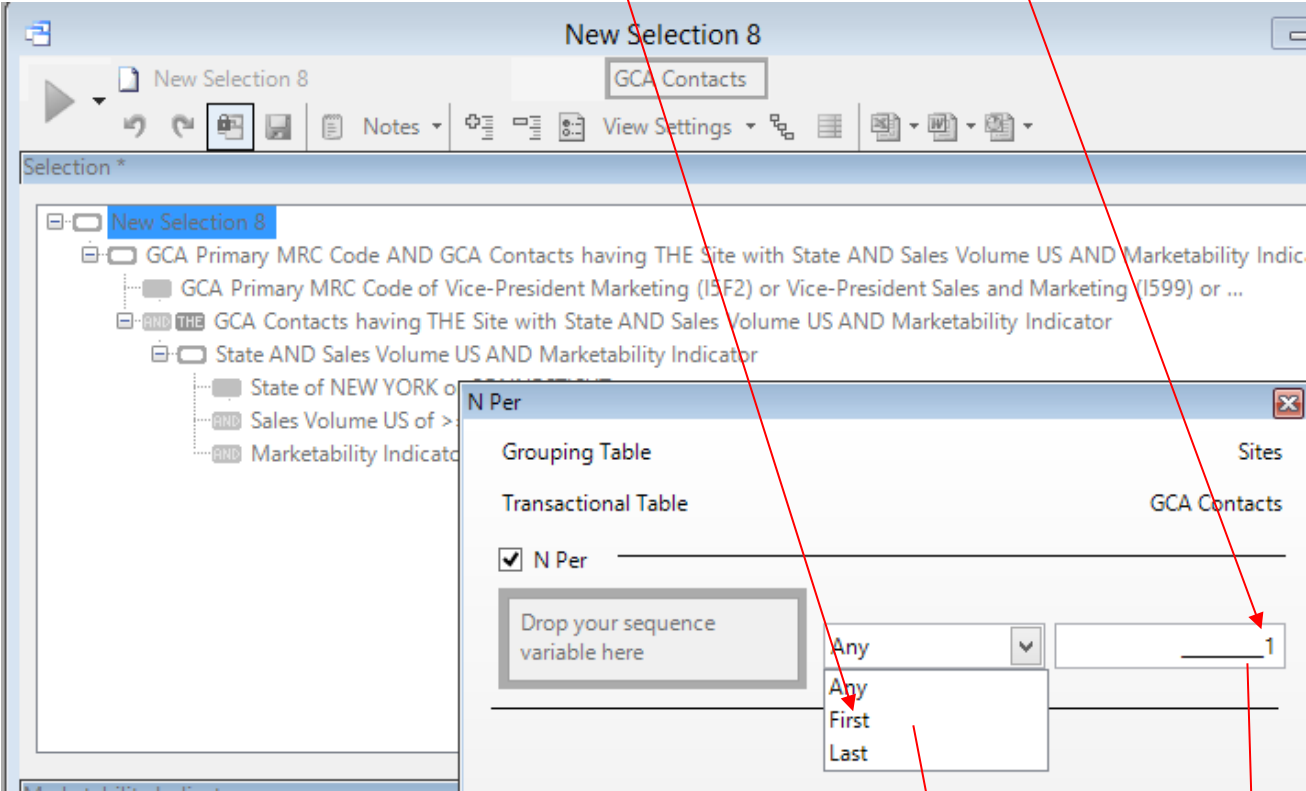
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Now go to the top selection and right click with your mouse and choose apply 'N' GCA contacts per site.

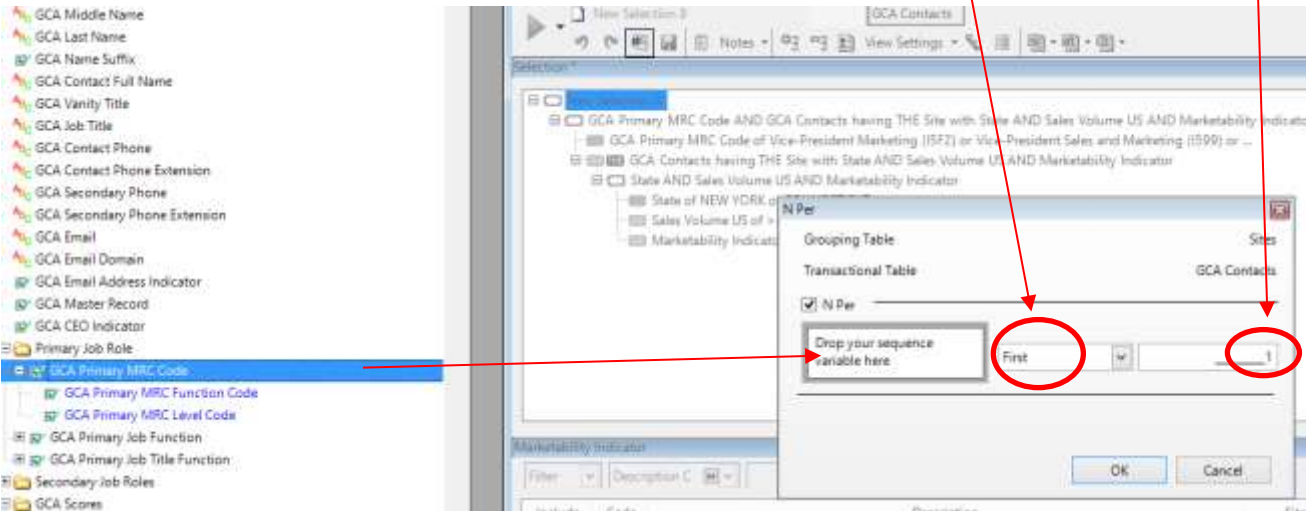
The screenshot shows a software window titled "New Selection 8" with a toolbar and a "Selection \*" pane. A right-click context menu is open over the "New Selection 8" item in the selection pane. The menu includes options: Cut, Copy, Paste, Delete, Not, Apply Limits..., Apply Top N..., Apply 'N' per 'Variable'..., **Apply 'N' GCA Contacts per Site...** (highlighted), Apply 'N' GCA Contacts per Global Ultimate Site..., **Rename**, Reset Description, Apply Alternatives..., and Cancel. Below the menu, a table titled "Marketability Indicator" is visible.

Include	Code	Description	Sites
<input type="checkbox"/>	A	Non-Marketable – Undeliverable Address or Unable to Confirm	1,599,2
<input type="checkbox"/>	D	Non-Marketable - De-listed Record	996,8

On the next screen you will want to choose first and then leave this at 1



Now you want to drag and drop the GCA Primary MRC code where it tells you to drop your sequence variable here.



When you drag and drop the GCA primary MRC code in that box the following screen will appear you will then need to find your titles on the left and drag them into the right hand box but they need to be in the order you will be looking for them in. Then click ok.

New Selection 8

GCA Primary MRC Code AND GCA Contacts having THE Site with State AND Sales Volume US AND Marketability Indicator

GCA Primary MRC Code of Vice-President Marketing (I5F2) or Vice-President Sales and Marketing (I599) or ...

AND THE GCA Contacts having

State AND Sales Volume

State of NEW YORK

AND Sales Volume US

AND Marketability Indicator

Marketability Indicator

Filter Description C

Include	Code	
<input type="checkbox"/>	A	Non-Marketable
<input type="checkbox"/>	D	Non-Marketable - De-listed Record
<input checked="" type="checkbox"/>	M	Marketable Record
<input type="checkbox"/>	O	Non-Marketable - Out Of Business

Sequence for GCA Primary MRC Code

Unallocated Decodes	Count	Sequenced Decodes	Count
Co-Trustee (A0AT)	33	Vice-President (A5D8)	1,953.3
Co-Venturer (A0AV)	155	Vice-President Sales and Marketing (A117)	35,464
Managing Trustee (A0AY)	22		
Receiver (A0AZ)	2,115		
Adventurer (A0GX)	36		
Executor (A0R0)	166		
Co-Adventurer (A0R3)	88		
Chief Legal Officer (A149)	1,268		
Chief Privacy Officer (A150)	2,663		
Chief Investment Officer (A154)	2,878		
C-Level Support (A189)	0		
Officer (A199)	308,44		
Chairman of the Board (A1A4)	60,351		
Vice Chairman (A1A5)	26,861		

Reset

OK

Cancel

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It will bring you back to this screen and simply click ok again.

New Selection 8

New Selection 8

GCA Contacts

Selection \*

New Selection 8

GCA Primary MRC Code AND GCA Contacts having THE Site with State AND Sales Volume US AND Marketability Indicator

GCA Primary MRC Code of Vice-President Marketing (I5F2) or Vice-President Sales and Marketing (I599) or ...

AND THE GCA Contacts having THE Site with State AND Sales Volume US AND Marketability Indicator

State AND Sales Volume US AND Marketability Indicator

State of NEW YORK or ...

AND Sales Volume US of > ...

AND Marketability Indicator

Marketability Indicator

Filter

Description C

Include	Code	Description	Sites
<input type="checkbox"/>	A	Non-Marketable – Undeliverable Address or Unable to Confirm	1,599
<input type="checkbox"/>	D	Non-Marketable - De-listed Record	996
<input checked="" type="checkbox"/>	M	Marketable Record	87,146
<input type="checkbox"/>	O	Non-Marketable - Out Of Business	

Include

OR

N Per

Grouping Table

Transactional Table

☒ N Per

GCA Primary MRC Code (seq'ed)

First

1

The First value for variable GCA Primary MRC Code is Vice-President (A5D8).

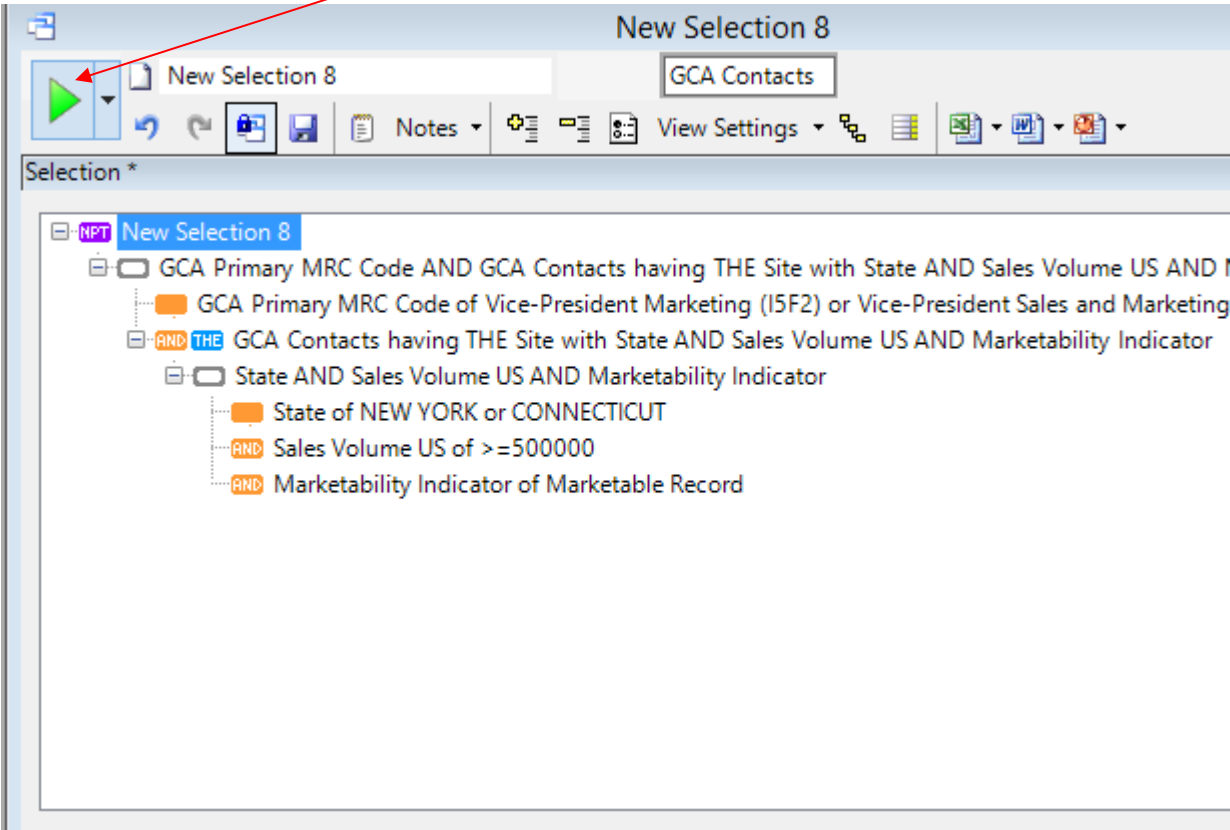
OK

Cancel

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Now run your selection by clicking the green triangle.



When this finishes there are several ways you can validate this worked properly the first is simply by clicking on the cover tab. The GCA contact count and Site count should be the same.

New Selection 8

New Selection 8

Cover

5,019 GCA Contacts

5,019 Sites

4,538 Global Ultimate Sites

Last updated on: 3/28/2017 at 11:38:10 AM by CoombeD

Using data loaded on: 3/6/2017 at 4:31:44 PM

Conte...

Notes

Page

Notes

New Selection 8

Cover

Selection

Next you can drag and drop a cube on your selection and drag into your cube the GCA Primary MRC code. And then again click the green run triangle.

The screenshot displays a software interface with a top toolbar, a left sidebar, and a main workspace. The toolbar includes icons for Analysis, Visualization, Modeling, Publish, Calculate, and Modelling. The left sidebar, titled 'Item Explorer', lists various variables. The main workspace shows a 'New Selection 8' panel with a 'Cube' section. Red arrows indicate the workflow: dragging a cube from the toolbar to the 'Cube' section, dragging 'GCA Primary MRC Code' from the 'Item Explorer' to the 'Drop your variable here' area, and clicking the green run triangle in the 'Cube' section.

**Item Explorer Variables:**

- GCA Individual ID
- GCA Name Prefix
- GCA First Name
- GCA Middle Name
- GCA Last Name
- GCA Name Suffix
- GCA Contact Full Name
- GCA Vanity Title
- GCA Job Title
- GCA Contact Phone
- GCA Contact Phone Extension
- GCA Secondary Phone
- GCA Secondary Phone Extension
- GCA Email
- GCA Email Domain
- GCA Email Address Indicator
- GCA Master Record
- GCA CEO Indicator
- Primary Job Role
- GCA Primary MRC Code**
- GCA Primary MRC Function Code
- GCA Primary MRC Level Code
- GCA Primary Job Function
- GCA Primary Job Title Function
- Secondary Job Roles
- GCA Scores

**New Selection 8 Panel:**

**Cube**

Notes | Thematic | Statistics | Cube

Drop your variable here

**GCA Primary MRC Code**

Drop your variable here

	GCA Contacts
Unclassified	-
Incorporator (A04	-
Joint Venturer (A0	-
Shareholder (A04;	-
Owner (A0A1)	-
Partner (A0A2)	-
Managing Partner	-
Corporate General	-
Senior General Par	-
Senior Partner (A0	-
General Partner (A	-
Limited Partner (A	-
Managing Limited	-
Co-Owner (A0AQ;	-
Co-Executor (A0A	-
Co-Trustee (A0AT	-
Co-Venturer (A0A	-

You should only see counts for the three MRC codes you selected.

GCA Primary MRC Code	GCA Contacts
Chief Marketing Officer (A117)	1,146
Vice-President Sales and Marketing (I599)	1,664
Vice-President Marketing (I5F2)	2,209
TOTAL	5,019

You can now license the records and create your data grid.