How to Use the Search Wizard

This Wizard will help you quickly look up a record using one or more of the following criteria DUNS Number, Business Name, SIC or Geography.

Go to your tool bar at the top of Market Insight and click on the Wizards tab. The Search Wizard is on the right hand side. Click it to open it.

The Search Wizard will open in the workspace. It will open with all of the available search options checked by default.

Go through this list and un-check any of the variables you DO NOT want to use; then click Next. For this example, I will use Business Name and Geographical Area (State).

	Variable
☐	Duns Number
☑	Business Name
☐	SIC code
☑	Geographical Area (Contintent,Country,State or County)
☐	Physical City
☐	Physical Zip
☐	Phone Number

Since I checked Business Name and Geography, the wizard will automatically take me to step 4, which is where I can enter the business name(s) that I am looking for.(for this example I used Motorola) *Note: The wizard will open to the correct step depending on what criteria you've checked.* As you can see, I'm not worried about capitalization, since the "match case" box is not checked on this screen.

At the bottom of this screen (and other text variable screens) you will see the "Contains" default for performing the search. You can open this and choose a different option, depending on your needs and knowledge of the text you are searching.

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Click Next. I am taken to step 6 of the wizard because I selected Geographical Area as my second search criteria.

Search. Business Name (Step 4 of 10)

please enter your values for Business Name
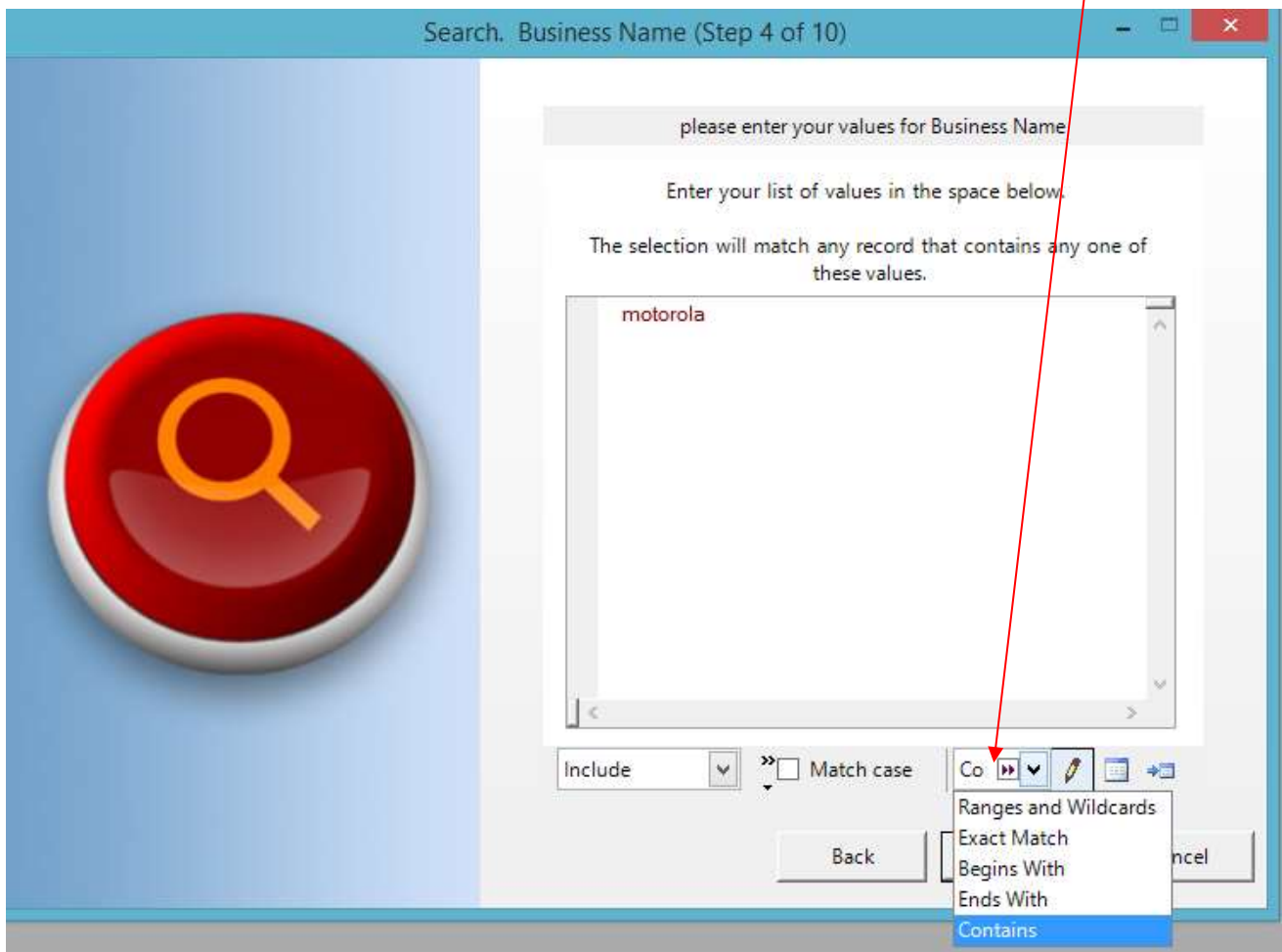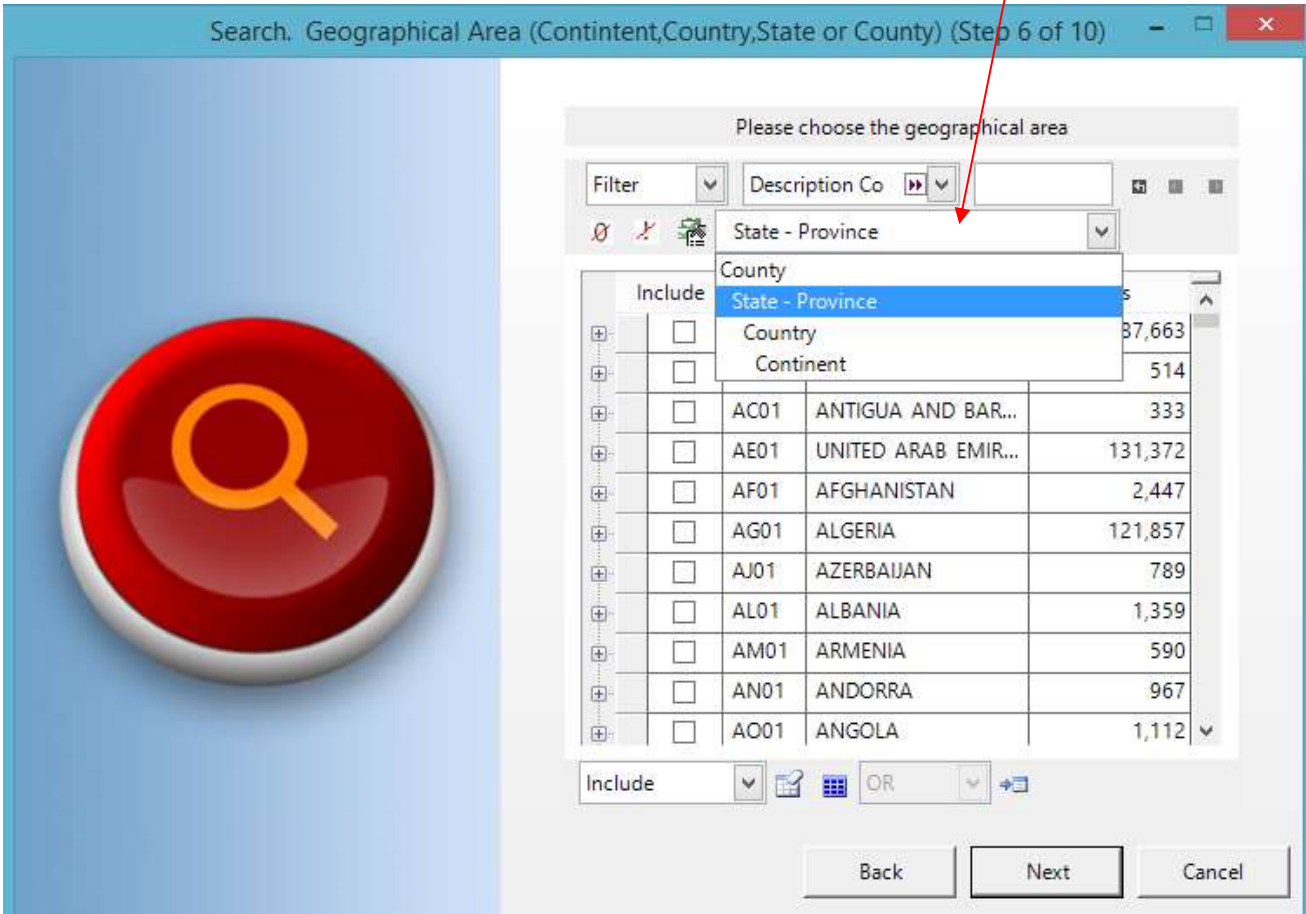
Enter your list of values in the space below.

The selection will match any record that contains any one of these values.

motorola

Include ⌄   »☐ Match case   Co ▶ ⌄ 🖉 ☐ →⬜

Back   Next   Cancel
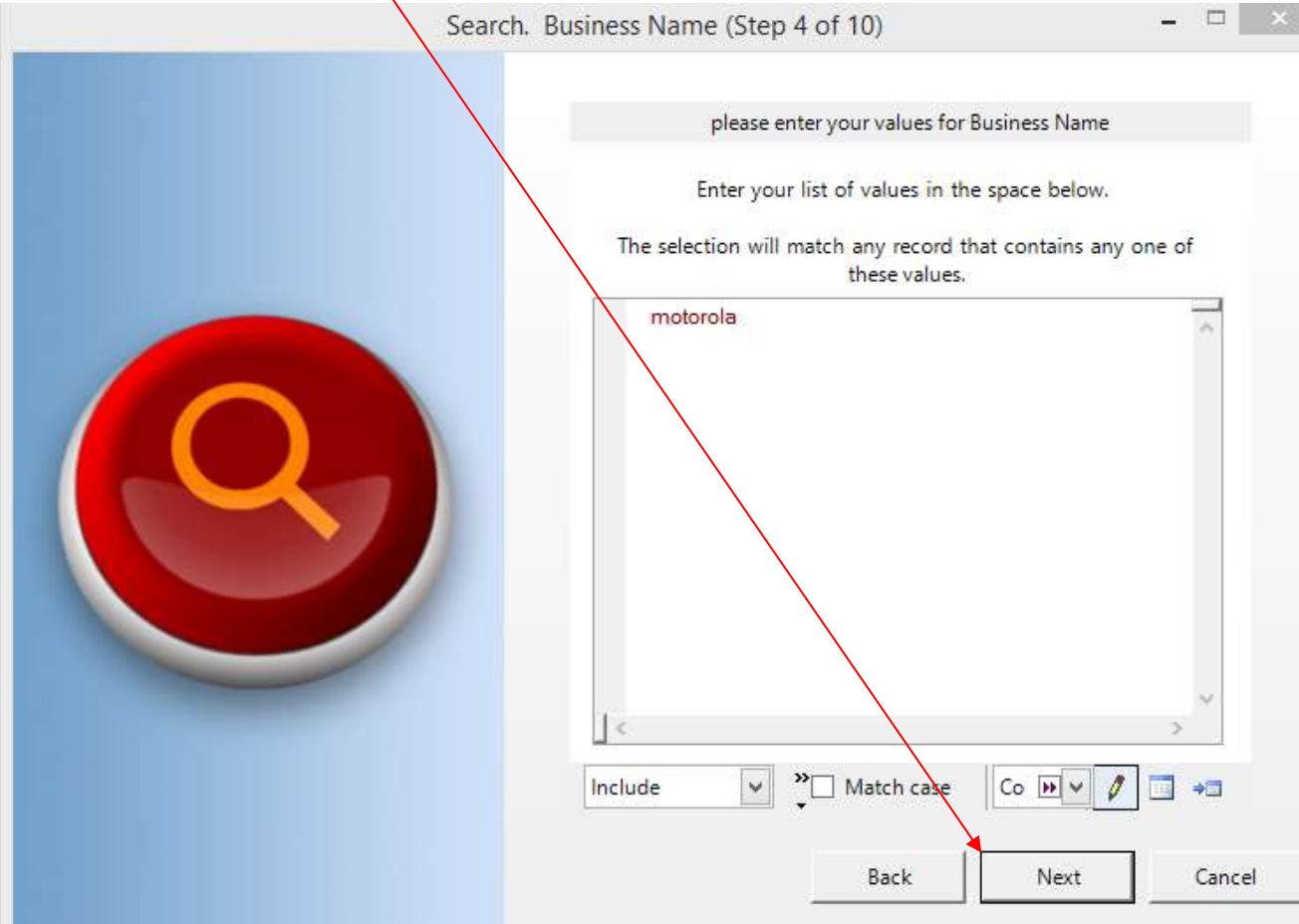
At the top of this screen, I will use the drop-down to select State-Province.

Then type in "michig" in the top text box to find any state/province with those characters as part of the description. I find Michigan and select that state for my search.
I am now taken to step 10.
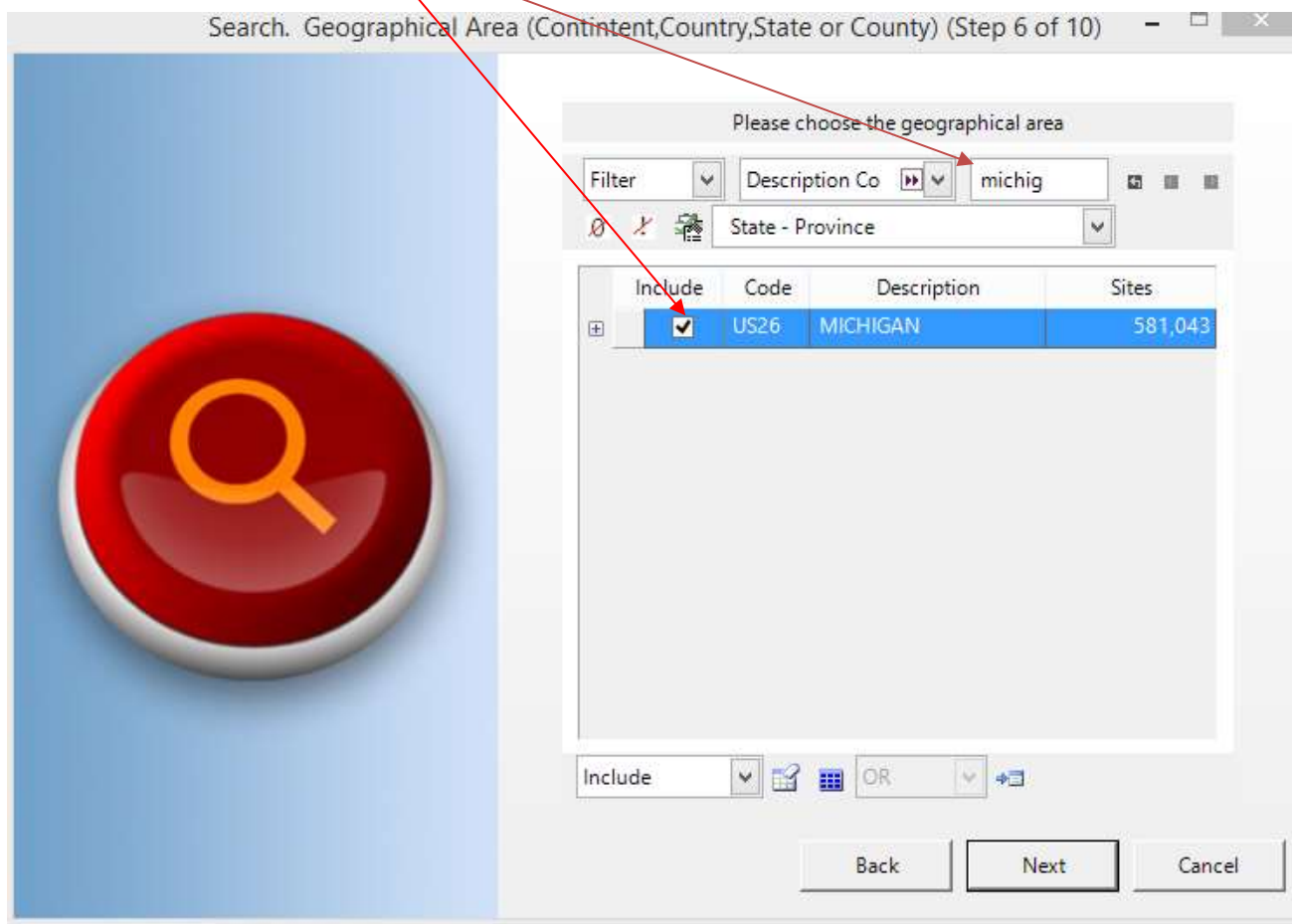
Next, you need to choose a data grid to display your results. You have three options:
1. Build a data grid for one time use. Then drag and drop it onto the drop zone.
2. Pre-Build a template for Search results: If you use the Search Wizard a lot and have certain data you need to return, you can pre-build a data grid that contains all the fields you want to view. Once you build it you can save a copy in the "Templates" tab on Tool Bar. The next time you use the search wizard you can just drag and drop the template at this stage of the wizard. *See the end of the document for the steps.*
3. You can use the default data grid which includes the following fields: DUNS number, Business Name, Location Type, Physical City, Physical State, Physical Zip, Country, Global Ultimate DUNS number and Global Ultimate Business Name.

I'm going to use the default template so I'm just going to leave this screen blank and click Finish to get my results.

I receive the data grid containing the candidates for my lookup request. I can now look through this list for the company name and specific location.

Duns Number	Business Name	Tradestyle	Location Type	Physical City	Physical State Abbreviati...	Physical Zip (All)	Country Na...	Global Ultimate Du
018365598	Motorola Sales...	Motorola	2	Bay City	MI	48706	USA	001325463
041743894	Motorola Soluti...	Motorola	2	Detroit	MI	48226	USA	001325463
076380948	Motorola Sales...	Motorola	2	Southfield	MI	48034	USA	001325463
126378520	Motorola Com...	Motorola	2	Grand Rapids	MI	49506	USA	001325463
148730252	Motorola Soluti...	Motorola	2	Troy	MI	48084	USA	001325463
618516710	Motorola Sales...	Motorola	2	Saginaw	MI	48605	USA	001325463
787147685	Motorola Soluti...	Motorola	2	Springport	MI	49284	USA	001325463
828080221	Motorola Soluti...	Motorola	2	Farmington...	MI	48331	USA	001325463
947967055	Motorola Soluti...	Motorola	2	East Lansing	MI	48823	USA	001325463
947967451	Motorola Soluti...	Motorola	2	Northville	MI	48168	USA	001325463
090749686	Motorola Soluti...		0	Lansing	MI	48917	USA	090749686

Building a Corporate Family Tree using the Linkage Tool

If I want to take the location that I found in the Search Wizard and build a D&B Corporate Family Tree, I just need to drag and drop the DUNS number from the Data Grid onto the Linkage Tool on the Tool Bar. *This will work from any Data Grid, not just the results of the Search Wizard.* Just remember, the DUNS Number *must* appear in the Data Grid in order to drag and drop a location into the Linkage Tool.

Highlight the row you want to select and put your cursor on the DUNS number. Then drag the DUNS number onto the Linkage Tool.

When you drag and drop your Duns number the linkage tool will open and look like the following.

The Linkage Tool will then return the Family Tree for the DUNS number you selected. The Default Data Grid has two DUNS numbers, the Site DUNS and the Global Ultimate Duns. Therefore the row I selected has two DUNS numbers, one for the site I selected and one for the Global Ultimate. I will automatically get two trees returned, one for each DUNS number. You will see tabs on the lower left hand side one for each DUNS number.

The first tab will be the Global Ultimate DUNS number. Notice it's highlighted in grey in the tree. Now click on the second tab. Scroll down and you will find the DUNS Number I selected is highlighted.

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How to Save a Data Grid in your Templates:
Open the Data Grid from your Tool Bar and add the variables you would like to view. I'm adding DUNS number, Business Name, Physical City, State-Province and Employee Total Range.
Name your Template in the box at the top. I've named mine Search Template.
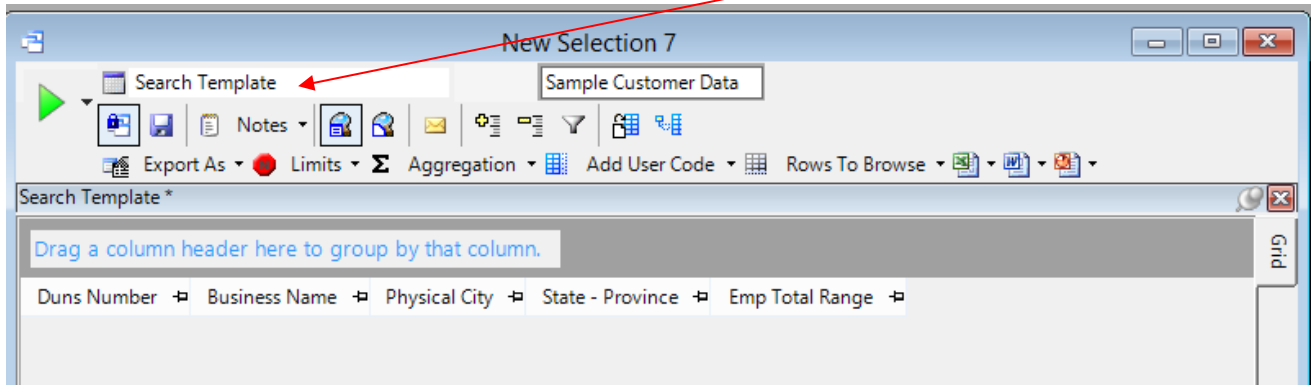
Click on the Template Tab on your Tool Bar to open the Template Drop Zone.
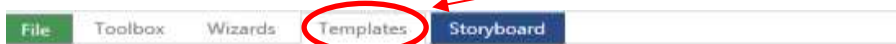
Hold your cursor over the Data Grid icon until you see the red box, now drag and drop the data grid onto the Template Drop Zone.
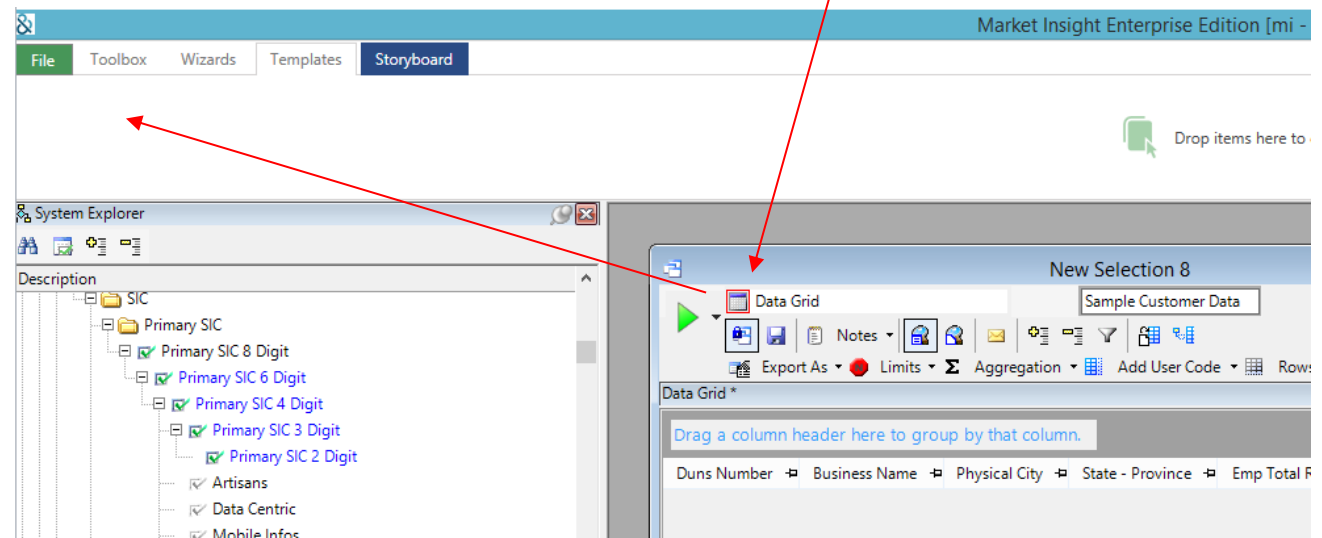
You should see your template in the Template tab now.