Corporate Family Linkage Plus—Market Insight Job Aid

The purpose of this document is to provide tips and best demonstrated practices for accessing Corporate Family Linkage Plus data though Market Insight. This job aid assumes a working knowledge of the Market Insight tool, as well as a conceptual understanding of the Corporate Family Linkage Plus file.

Corporate Family Linkage Plus—Definition of Terms

Site / Case Duns – This is the site location sometimes referred to as a unit.

Site / Case Global Ultimate – This field displays the traditional linkage HQ Duns associated with the case duns. The field will be zero filled for all unlinked records.

Linkage Structure Code – Three possible values (L,N,C). The "L" codes are for linked records not company owned. Code value "N" are unlinked records. Value "C" are company owned locations.

Franchise Type Code – This 8 digit code is a unique franchise identifier. It can be used to group like records by franchise. Four digit SIC codes are used for non-franchise entities like HealthCare records.

Corporate Linkage Type – This code identifies why this record is on the file from a high level perspective. Am I an "A" Agent, "D" Dealer, "F" Franchise, "P" Partnership, "G", Managing Director, "C", Coop, "S", Chapter or "H" Healthcare.

Operational Duns – This field is used to define a high ranking subsidiary within the traditional family tree of the brand. This DUNS can be used as a rollup duns for a concept within a brand. For example each of the concept names under Yum Brands like Pizza Hut, Long John Silvers, A&W, Taco Bell and KFC will have separate Operational Duns.

Operational Duns Global Ultimate – The Global Ultimate associated with the OP DUNS. In the case of Yum Brands each OP DUNS under the concepts will have the YUM Brands Global Ultimate DUNS.

Helpful Hints

- To locate all sites for a specific **Franchise,** follow instructions titled "**Search by Franchise Code**" or "**Search by Name**"
- To locate all sites that are related through **Minority Ownership** to a specific company, follow instructions titled "**Minority Interest Search**"
- To determine if a DUNS Number or a list of DUNS Numbers is associated with other sites in the Corporate Family Linkage Plus file, and to append CFTP data to the DUNS Number(s), follow instructions titled "**Append Corporate Family Linkage Plus Data to a DUNS or List of DUNS."**
- To locate CFTP records by Business Name, follow the instructions for "**Search by Name**."
- To locate CFTP records for **Partnerships**, follow instructions for "**Search by Name**, or **Search by Operational DUNS** or **Operational DUNS Ultimate**, drag your data grid or template in to your Selection, and use the Alt-Linkage Type data element to identify Partnerships.

For additional tips or searching methods, contact your D&B representative.

Corporate Family Linkage Plus—Types of Linkage Available

- **Franchise Relationships** - examples include fast food restaurants, convenience stores, hotels
- **Agents**—example:independent insurance agents affiliated by insurance brand
- **Dealer Relationships**—example: car dealers affiliated by product line
- **Non-Profit Organizations**— example: Red Cross
- **Health Care Affiliations**— example: non-profit health systems, hospitals, nursing facilities
- **Minority Ownership**—companies affiliated through minority stock ownership, not linked in D&B's traditional linkage file
- **Partnerships**— partnership records not linked in D&B's traditional linkage file due to legal structure
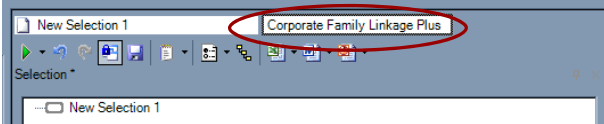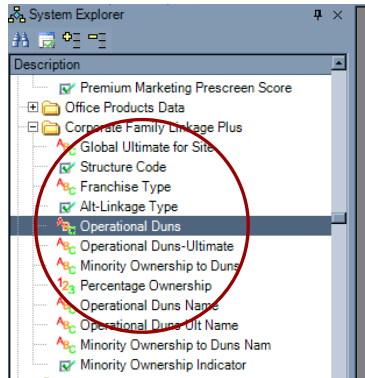
Searching Methods—Contents

The purpose of this document is to provide tips and best demonstrated practices for accessing Corporate Family Linkage Plus data though Market Insight. This job aid assumes a working knowledge of the Market Insight tool, as well as a conceptual understanding of the Corporate Family Linkage Plus file.

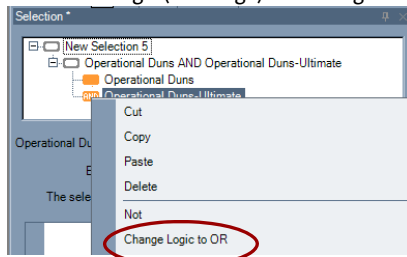## Search by Operational DUNS and / or Operational Ultimate DUNS

1. Locate Operational DUNS Number via dnb.com. For example, to identify Wendy's locations, locate the top Headquarters / Parent location for Wendy's International. DUNS Number: 05-285-6671.

2. In Market Insight, ensure that the box to the right of "New Selection" reads "Corporate Family Linkage Plus."
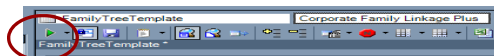   - To change, right click on the box, and select "Corporate Family Linkage Plus."

3. In the System Explorer pane, scroll down to **Corporate Family Linkage Plus.**
4. Drag **Operational DUNS** to your Selection.

3. Enter the DUNS Number you located on dnb.com in the text box below the Selectio n window.
4. If you want to search on both **Operational DUNS** and **Operational Ultimate DUNS,** drag the Operational DUNS to the Selection, enter the DUNS Number, then drag Operational Ultimate DUNS to the Selection, and enter the *same* DUNS Number.
5. Change the "and" logic to "or" logic:
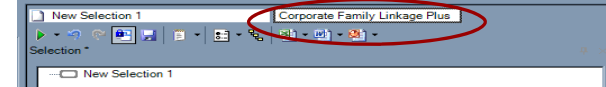   - Right click on "and" logic (in orange) and change to "or" logic.

6. Drag your data grid or template to your Selection.
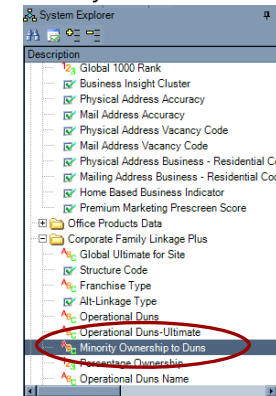7. Click "Run."

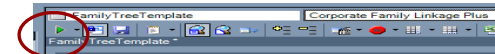## Minority Interest Search

1. Locate the DUNS Number of the company owning the shares or interest in other companies via dnb.com.

2. In Market Insight, ensure that the box to the right of "New Selection" reads "Corporate Family Linkage Plus."
    - To change, right click on the box, and select "Corporate Family Linkage Plus."

3. In the System Explorer pane, scroll down to **Corporate Family Linkage Plus.**
4. Drag **Minority Ownership To DUNS** to your Selection.
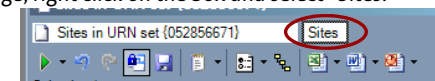

3. Enter the DUNS Number located on dnb.com in the text box below the Selection window.
4. Drag your template or data grid to your Selection.
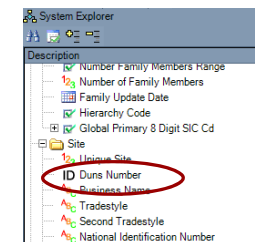5. Click "Run."

Append Corporate Family Linkage Plus Data to a DUNS or List of DUNS

1. Ensure the box to the right of "New Selection" reads "Sites."
    - To change, right click on the box and select "Sites."
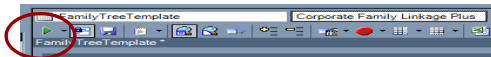

2. Drag DUNS Number to your Selection.

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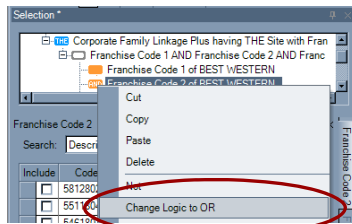
Append Corporate Family Linkage Plus Data to a DUNS or List of DUNS (CONTINUED)

3. Enter DUNS Numbers or paste list of DUNS Numbers to text box below the Selection window.
4. Drag your data grid or template to your Selection.
5. Ensure the box to the right of "New Selection" reads "Corporate Family Linkage Plus."
   - To change, right click on box and select "Corporate Family Linkage Plus.
6. Ensure any or all data elements from the "Corporate Family Linkage Plus" list in your System Explorer are in your data grid or template.
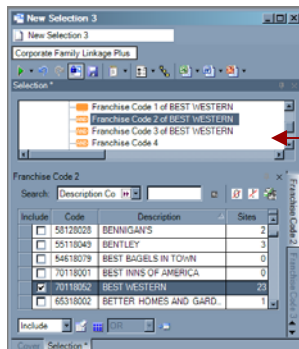7. Click "Run."

Search by Franchise Code

1. In your System Explorer, scroll down to the list of data elements under "Site Add On."
2. Drag Franchise Code 1, Franchise Code 2, (through Franchise Code 6) to your Selection.
3. Change logic from "and" to "or:"
   - To change, right click on the orange "and" box in your Selection and then select "Change Logic to "or."
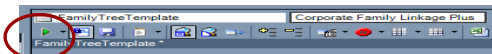

4. For each Franchise Code (1-6), select the Franchise(s) for which you are searching from the list. For best results, select the franchise in the list for ALL Franchise Codes (1-6) in the Selection.
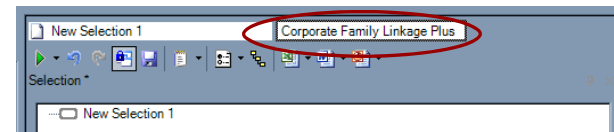

Continue selecting "Best Western" for remaining Franchise Codes

5. Drag your template or data grid to your Selection. Ensure the Franchise data elements you need from the "Site Add On" list, as well as the elements from the "Corporate Family Linkage Plus" list are in your template or grid.
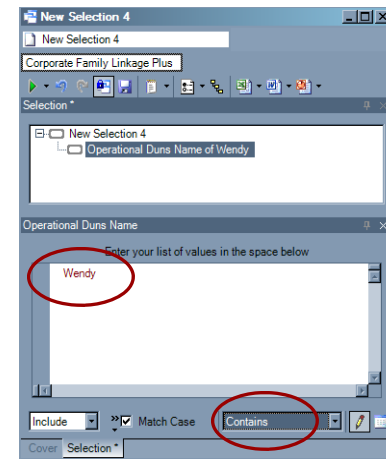6. Click "Run."

Search by Name

1. You can search by name for the following Corporate Family Linkage Plus Data Elements:
   - Operational DUNS Name
   - Operational DUNS Ultimate Name
   - Minority Ownership To DUNS Name
   For this example, we will use Operational DUNS Name, but the same steps can be used for the other data elements.
2. Ensure the box to the right of "New Selection" reads "Corporate Family Linkage Plus."
   - To change, right click on the box, and select "Corporate Family Linkage Plus."

3. From your System Explorer pane, select "Operational DUNS Name to your Selection.
4. In the text box below, enter the name you are searching on. For best results, ensure the drop down box on the bottom right reading "Exact Match" is changed to "Contains." It is also best to simplify the name you are searching for. For example, rather than entering "Wendy's", enter "Wendy" and then use the "Contains" option.

5. Drag your template or data grid onto your Selection. Ensure any or all the Corporate Family Linkage Plus elements you need are in your template or grid.
6. Click "Run."