INSIDEVIEW INSIGHTS

User Guide

Product Version 4.3

February, 2019

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Chapter 1: Introduction to InsideView Insights

InsideView Insights for Dynamics 365 helps you find more leads, win more deals, grow your business and retain your accounts. It infuses Dynamics with essential company and contact data, business insights and selling triggers; and connects directly to your largest referral networks and social media feeds. The Information in Insights is updated continuously from more than 40,000 financial and social media sources and validated with InsideView's MTV data science technology to ensure that you have the most accurate and complete lead information.

InsideView Insights 4.3 is supported only in Unified Client Interface (UCI) view of Microsoft Dynamics 365 version 9.0.

Note: Throughout this document, you will find the word "Insights." Most of the time it refers to the solution, InsideView Insights. In some instances, "Insights" is used to refer to specific features, such as Tab names and user interface (UI) elements. The context will make it clear.

InsideView Insights provides key elements that can help you win more deals:

- **Overview**, which include current company news, key business events, firmographics, news, and key contacts for helping you to prepare for sales calls with articles from mainstream media, industry-specific publications, and regulatory filings.
- **Relationship Assistant**, functionality of Microsoft Dynamics 365 is integrated with Insights to push updates about mergers & acquisitions (M&A) via Relationship Assistant action cards. You can view news about M&A activity related to accounts that own in your CRM.
- **Research** provides comprehensive and up-to-the-minute information about companies, so you can identify industry information, similar accounts (competitors) and financial data before you approach them for business conversations.
- **Find Contacts** enables you to sell more effectively by helping you find the right contact, identify your mutual connections, and learn more about them so you can quickly and easily establish rapport and build credibility.
- **Start a Conversation** lets you view contact's demographic information, which includes email address, phone number as well as employment details. It also helps you to find out how you are connected with contact's personal connections and previous co-workers so that you can start a business conversation with right contact information.
- **Discovery Center** allows you to research a company and contact even if that company and contact is not in Dynamics 365 CRM. You can view the complete data about contacts and companies. You can also add a company and contact to Dynamics 365 or to a Watchlist from the search results. The Discovery Center also provides an intuitive "Watchlist" stream that tracks and displays various watchlists based your watchlist agent settings.
- **Family Tree** lets you discover subsidiaries, acquisitions, international divisions, and

a host of other corporate relationships.

- **Tech Profiler** empowers you to find new prospects, plan account strategies and keep tabs on key target accounts based on technologies they use that are relevant for your sales and marketing teams. Tech Profiler is an add-on to InsideView Insights. In Insights solution, it appears only when you purchase Tech Profiler add-on for your Insights account separately as an additional tab on the Company Insights page.
- **List Build** lets you identify companies or executives that match a particular set of search criteria. You can view the company and executive's firmographic data, save a search criteria, modify a saved search, and export the list of companies or people in an Excel spreadsheet.
- **Multiple Watchlists** allows you to create Watchlists for a company/contact instantly. You can create multiple Watchlists in the User Settings page. This feature makes your job is easy by letting you track companies/contacts in various Watchlists. It gives you the flexibility to keep a watch while using other functions.
- **Add company/person** lets you add a company/person (contact) that does not exist in the Insights database. If you don't find a company/person in the search results, you can just add basic company/person details, which will be verified and included in the Insights database.
- **Custom Agents** allow organizations to extend and personalize the monitoring capabilities of Insights beyond the standard agents provided with the Insights solution. Organizations can create Custom Agents to find media coverage, business events, and discussions using a set of conditions specific to their sales efforts.
- **Team Agents** are available only to users who have purchased Insights Enterprise license directly from InsideView. Team Agents are agents created for you, according to your requirements, by your InsideView customer success manager (CSM), which you can share across your team.
- **Find Contact** lets you add an executive as a contact or a lead in the Microsoft Dynamics CRM, when an executive is not found in the CRM.
- **Buzz** lets you view the latest blog posts, Facebook posts, and Tweets made from the company's official accounts as well as posts and Tweets made by others *about* the company.

Note: InsideView Insights is included at no additional cost with following subscriptions in the U.S. and Canada: Dynamics 365 Professional and Enterprise, Dynamics 365 Plan 1 and Plan 2, Dynamics 365 for Sales, Dynamics 365 for Customer Service, Dynamics 365 for Field Service, Dynamics 365 for Sales – Customer Engagement Plan, Dynamics 365 for Sales – Microsoft Relationship Sales, and Dynamics 365 for Project Service Automation.

What's New in this Release?

The following new features are introduced in this release of InsideView Insights:

- **About Insights** lets you view new features and functionality within Microsoft Dynamics 365 integrated view.
- **Contact Search in Discovery Center**: Lets you search contacts within your 365 for business conversations with complete details.
- **Relationship Assistant**: Insights uses Relationship Assistant's artificial intelligence (AI) to send tailored, just-in-time and actionable alerts to CRM users so that they can prioritize and engage with most relevant information.
- **Insights Dashboard:** Allows you to view your Watchlist Activity Stream and Agents directly from Microsoft Dynamics Home page.
- **Add company/contact:** Lets you add a company/contact that does not exist in the Insights database.
- **List Build:** Identify companies or executives that match a particular set of search criteria.
- **Multiple Watchlists**: Create various Watchlists for companies and contacts that you wish to track.
- **Custom Agents:** Find media coverage, business events and discussions using a set of conditions specific to your business.
- **Team Agents**: Available only to users who have purchased Insights Enterprise license directly from InsideView.
- **View Contact/Company**: View an executive as a lead or contact. Allows to view a company in the CRM using the navigation link in the Discovery Center.
- **Expanded CRM Summary View**: Allows you to keep Insights Summary Panel always in expanded view by overriding the settings defined by your administrator for account, contact, lead and opportunity entities.

Additional Resources

As a new user of InsideView Insights you may find the following training resources helpful. They will show you how to use Insights to do pre-call research, find new prospects, keep your account and contact data up-to-date, and more.

- Training webinar : https://trainme.insideview.com/training-webinar-effective-b2b-selling-with-insights-enterprise/
- Quick Tip videos : https://www.youtube.com/channel/UCPjithmmnhKJlX_RIRSRHcQ

Getting to InsideView Insights

Insights provides contextual information within Dynamics 365. This includes options to search for a company or individual in the Insights database, manage your Watchlists, view company insights categories, and leverage your referral network.

You can get to Insights application in Dynamics 365 from the following entities: accounts, leads, contacts, and opportunities.

Important Note: InsideView Insights is a third party application, which is designed to be accessed only within the Account, Contact, Lead and Opportunity entities.

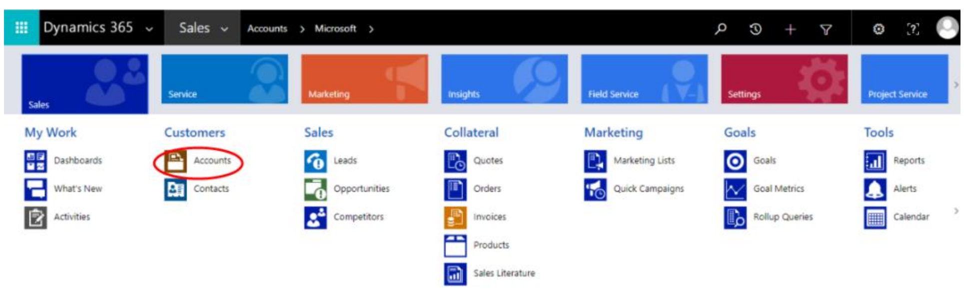
If you launch InsideView Insights from Microsoft's MyApps (https://portal . office . com/myapps) page, it will cause an error.

This issue occurs because Insights redirects you to oAuth secure login, which is not supported in the apps context because it does not have required parameters to open the application.

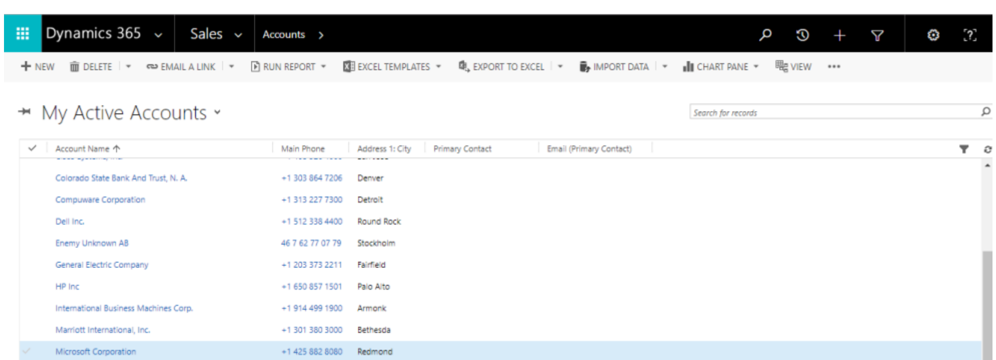
Accounts

1. On the navigation bar, click the **Main** button.
2. Go to the **Sales** work area.

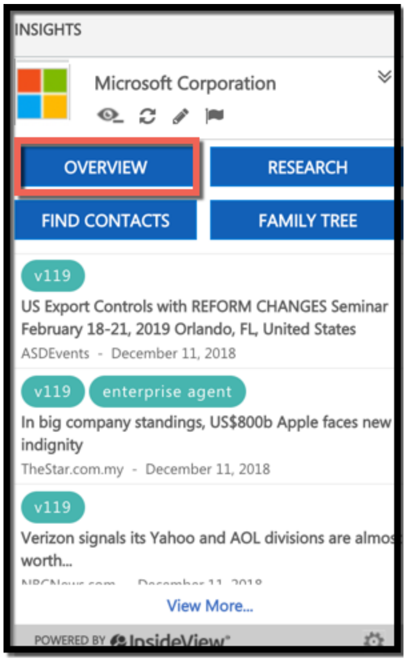
3. Click the work area name, and then click **Accounts**.



4. Open an account.



5. The Insights summary panel appears on the right side of the page.

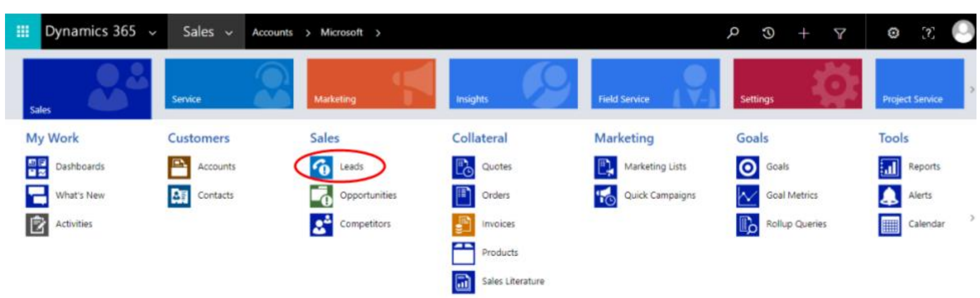


6. Click the **Overview** button to view the company's information.

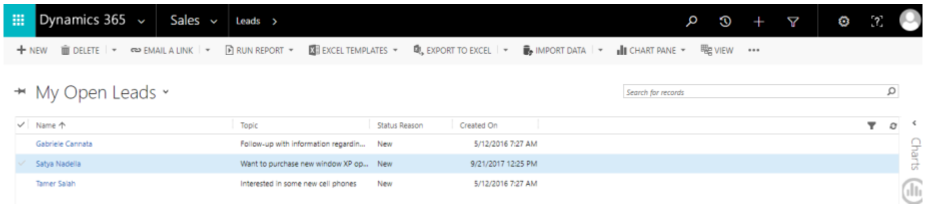
Leads

1. On the navigation bar, click the **Main** button .
2. Go to the **Sales** work area.

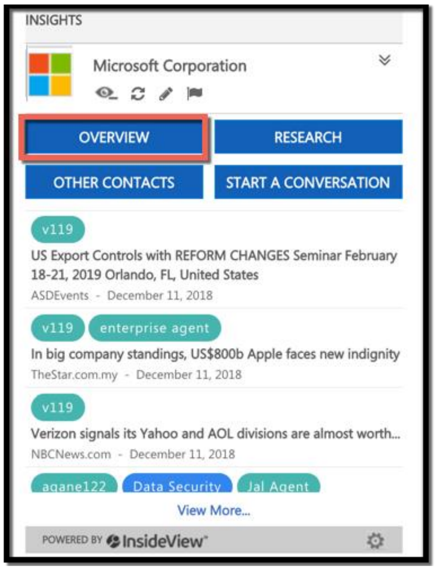
3. Click the work area name, and then click **Leads**.



4. Open a lead.



5. The Insights pane appears on the right side of the page.

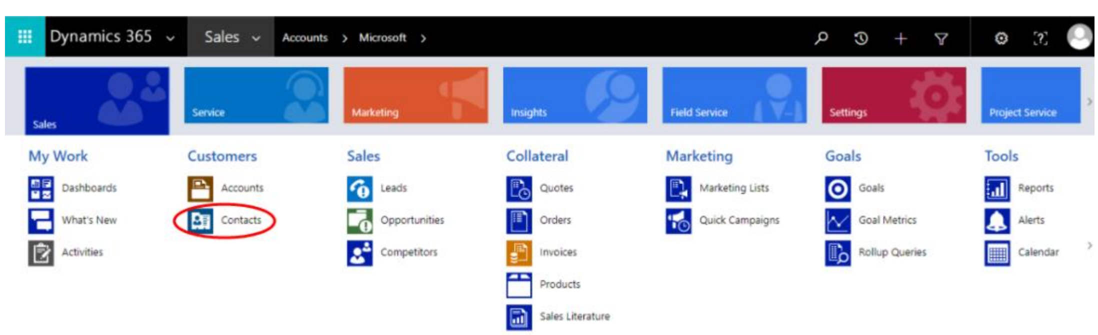


6. Click the **Overview** button to view the company's information.

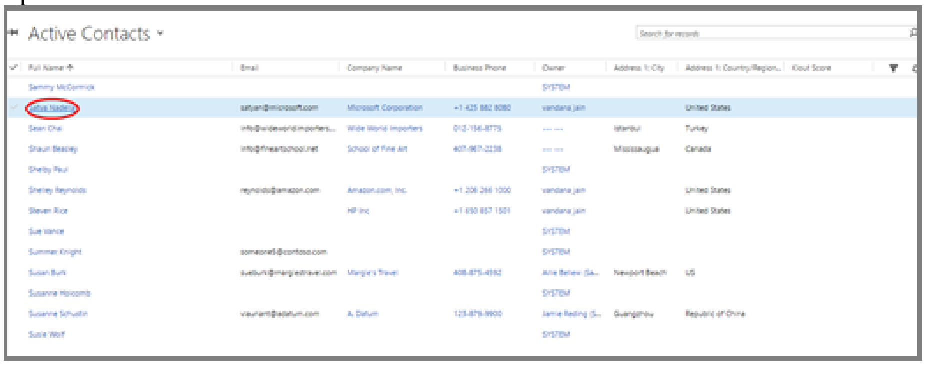
Contacts

1. On the navigation bar, click the **Main** button.
2. Go to the select **Sales** work area.

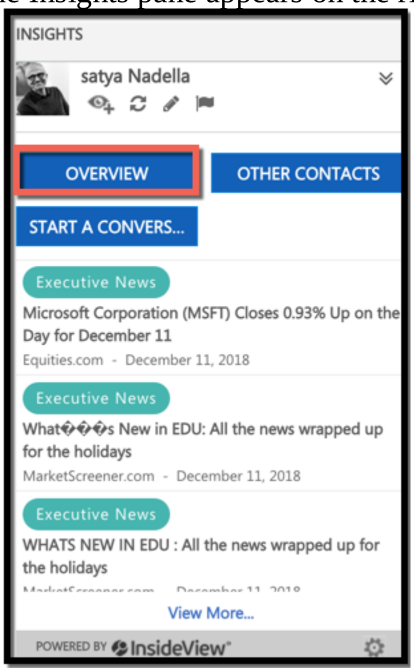
3. Click the work area name, and then click **Contacts**.



4. Open a contact.



5. The Insights pane appears on the right side of the page.

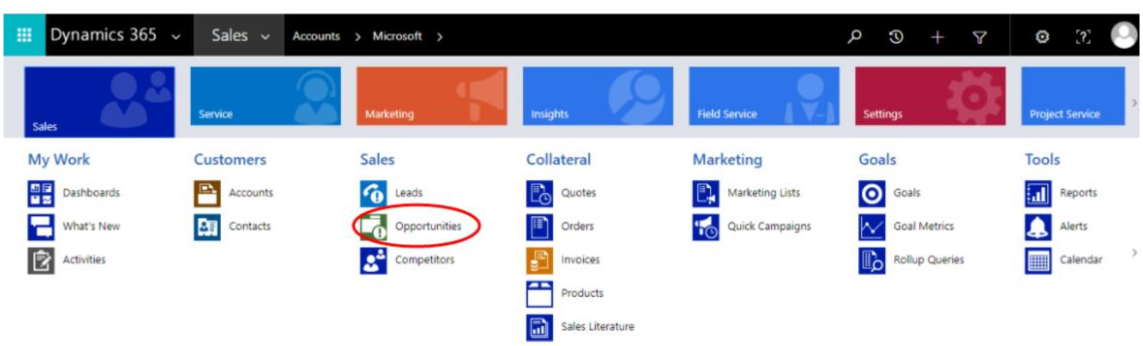


6. Click the **Overview** button to open the contact's information.

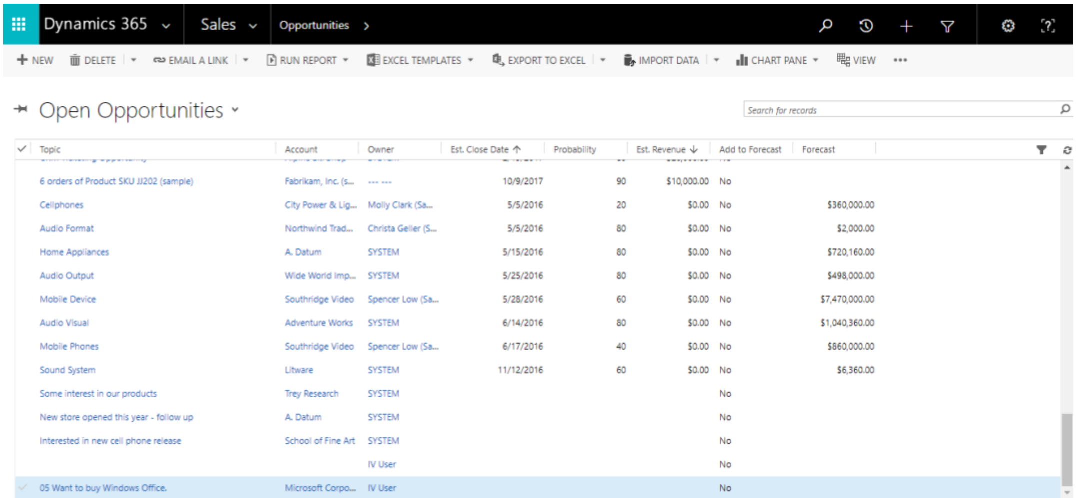
Opportunities

1. On the navigation bar, click the **Main** button .

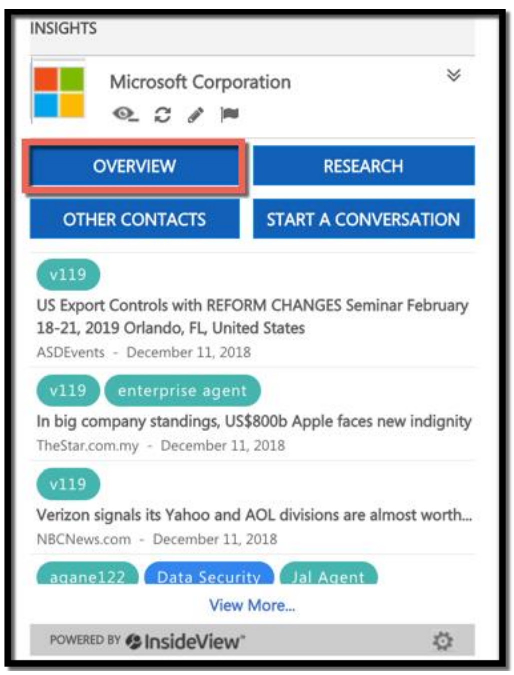
2. Select the **Sales** work area, and then click **Opportunities**.



3. Open an opportunity.



4. The **Insights** pane appears on the right side of the page.

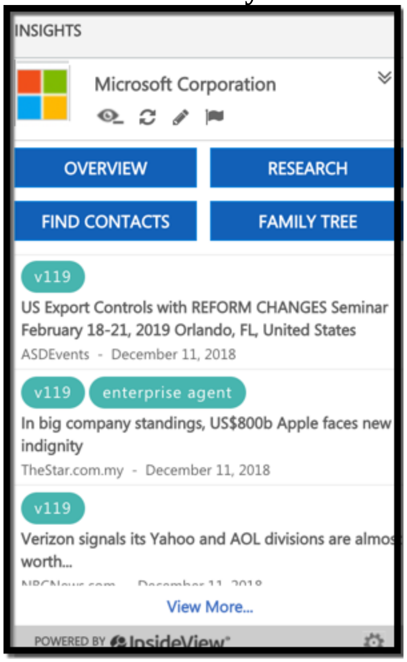


5. Click the **Overview** button to view the company's information.

Insights Summary Panel Actions

Insights Summary Panel for Account, Contact, Lead or Opportunity provides buttons to view Overview, Research, Find/Other Contacts, Start a Conversation and Family Tree. Here's how you can use these buttons:

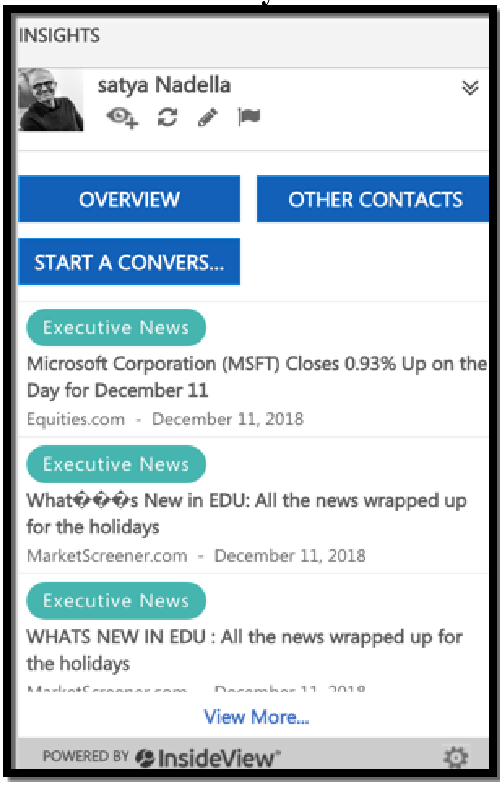
Account Summary Panel



Use these buttons as described here:

- **Overview** to view a company's news, key contacts, firmographics, news and key contacts.
- **Research** to view industry information, similar accounts (competitors), and financial data.
- **Find Contacts** to view contacts in a company you are following.
- **Family Tree** to view subsidiaries, acquisitions, international divisions, and other corporate relationships.

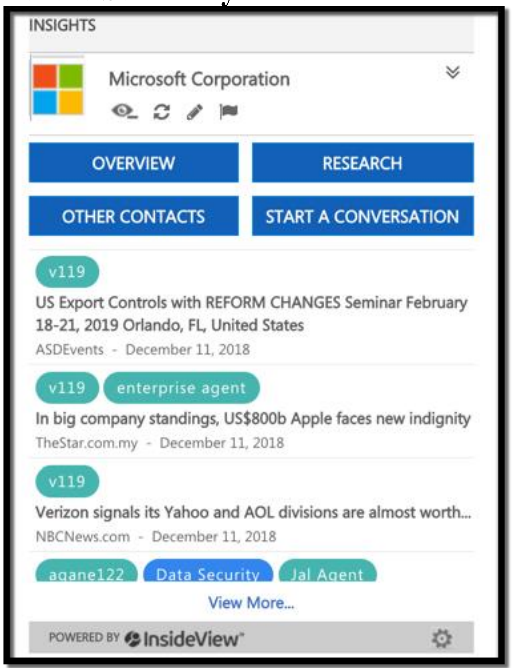
Contact's Summary Panel



Use these buttons as described here:

- **Overview** to view a company's news, key contacts, firmographics, news and other key contacts.
- **Start a conversation** to view the contact's demographic information, connections, blog and social media feeds.
- **Other Contacts** to view other contacts in a company.
- **View More** to view the news about the contact.

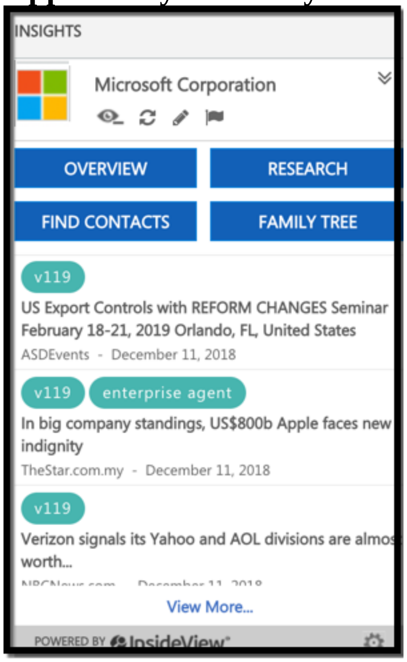
Lead’s Summary Panel



Use these buttons as described here:

- **Overview** to view a company’s news, key contacts, firmographics, news and other key contacts.
- **Research** to view industry information, similar accounts (competitors), and financial data.
- **Other Contacts** to view other contacts in a company.
- **Start a conversation** to view the lead’s demographic information, connections, blog and social media feeds.
- **View More** to view the news about the contact.

Opportunity Summary Panel



Use these buttons as described here:

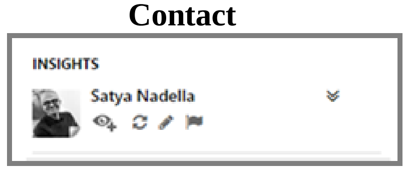
- **Overview** to view a company's news, key contacts, firmographics, news and other key contacts.
- **Research** to view industry information, similar accounts (competitors), and financial data.
- **Find Contacts** to view contacts in a company you are following.
- **Family Tree** to view subsidiaries, acquisitions, international divisions, and other corporate relationships.
- **View More** to view the news about the contact.

Insights components

Insights components provide functionality to view firmographic data, add companies and contacts to Watchlists, update contact information, and edit or report incorrect company or contact information.

Company

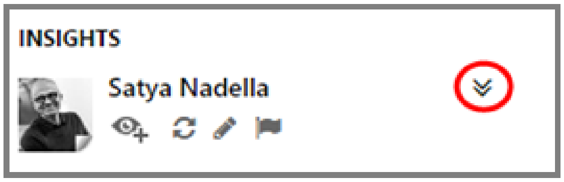
Contact



View company or contact firmographic data

The **Show Firmographics** button in Insights lets you view the company firmographic and contact demographic information. Here's how:

1. Go to the Contacts or Company page and click the **Show Firmographics** button.



2. Company firmographic data or the contact demographic information appears in Insights:

3. Click the **Show Firmographics** button again to collapse the view.

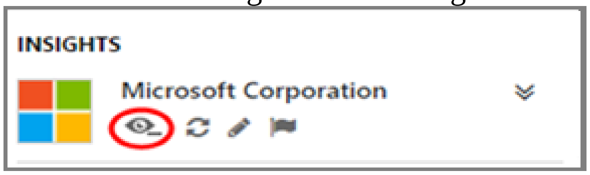
Add a company or a contact to a Watchlist

Watchlists send daily or weekly email notifications of the latest news and events for a company you are following.

The **Add to Watchlist**  button lets you add a company or a contact to a Watchlist with one-click. Just go to the Company or Accounts page and then click the **Add to Watchlist** button.

Remove a company or a contact from a Watchlist

When you add a company or contact to a Watchlist, the **Add to Watchlist** button changes to show a minus sign . To remove that company or contact from the Watchlist, click the **Add to Watchlist** button again and it changes back to the plus sign.



Update (sync) account or contact information

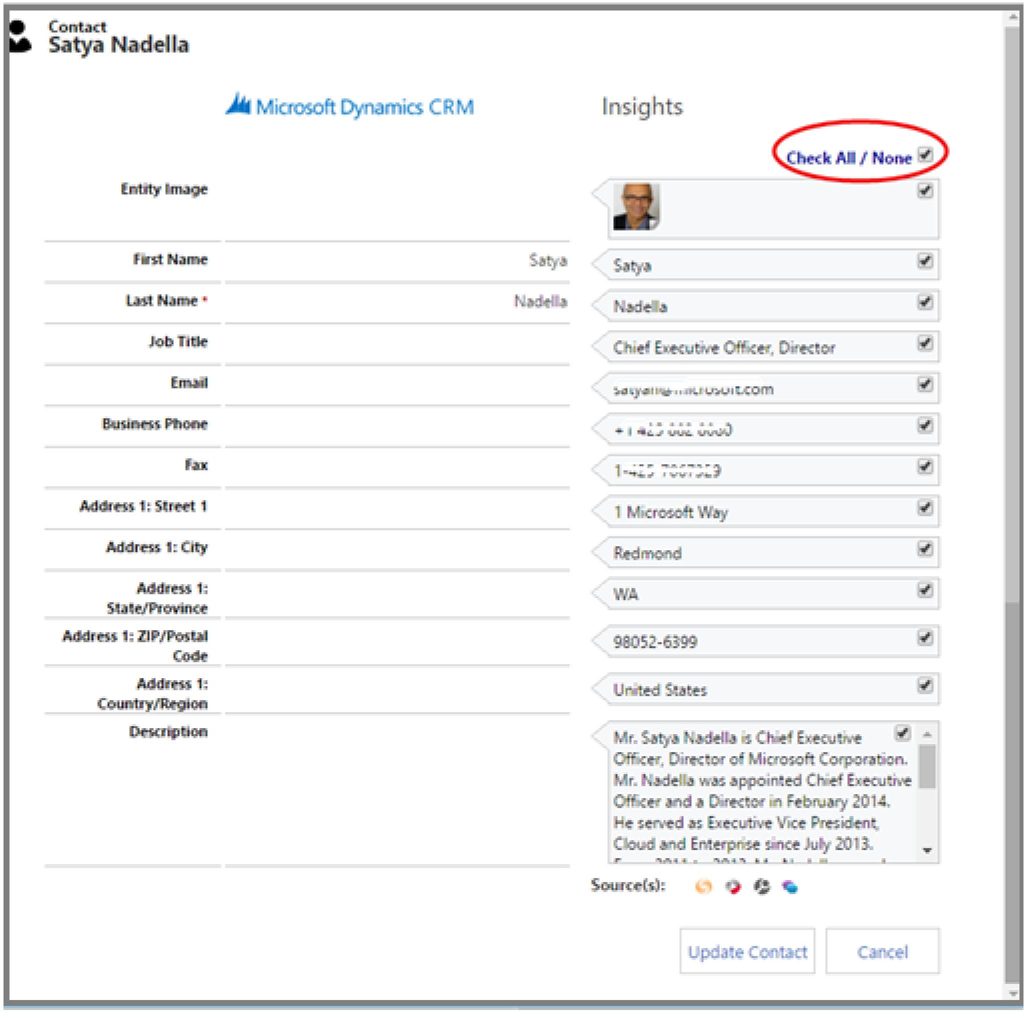
Insights allows you to synchronize company and contact information to Dynamics 365 from the Insights database with validated, up-to-the-minute information. Here's how:

1. Go to the Contact Details or Account Details page, and then click the **Update Contact Information** button .

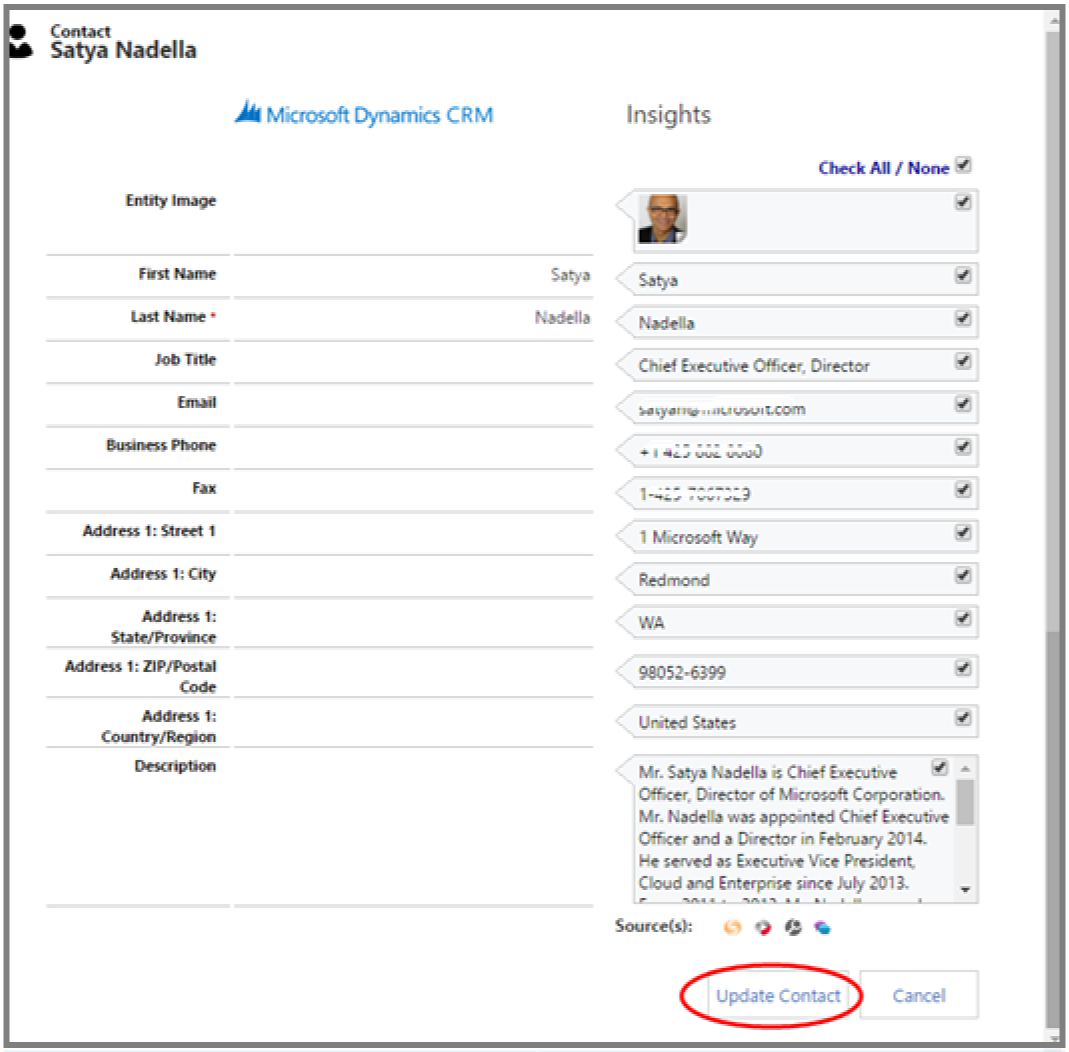
2. In the Contact or Account dialog box, in the **Insights** area, select the check box for an individual field to modify that field or click Check All to enable all fields for editing. You can also use the lists for options fields such as **Industry** and **Ownership** etc. to select an item from the list.

3. Update the fields that you enabled for editing as needed.



Note: If you have set **Company Logo** and **Contact Image** fields on the Insights Organizational Settings page, you will see an image on the Update/Sync user interface, which is retrieved from the Insights database. If there are no images in the Insights database, then the default icon for a company or a contact is displayed.

4. Click **Update Contact** or **Update Account** to save your changes.



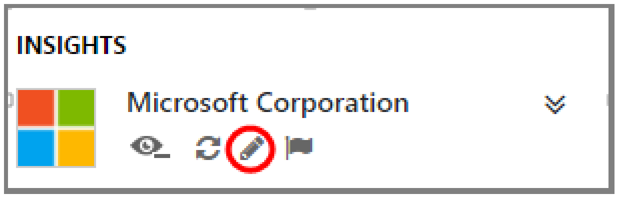
5. Click **Cancel** to go back to the Contact Details or Account Details page.

Resolving an incorrect pairing for a company or contact match

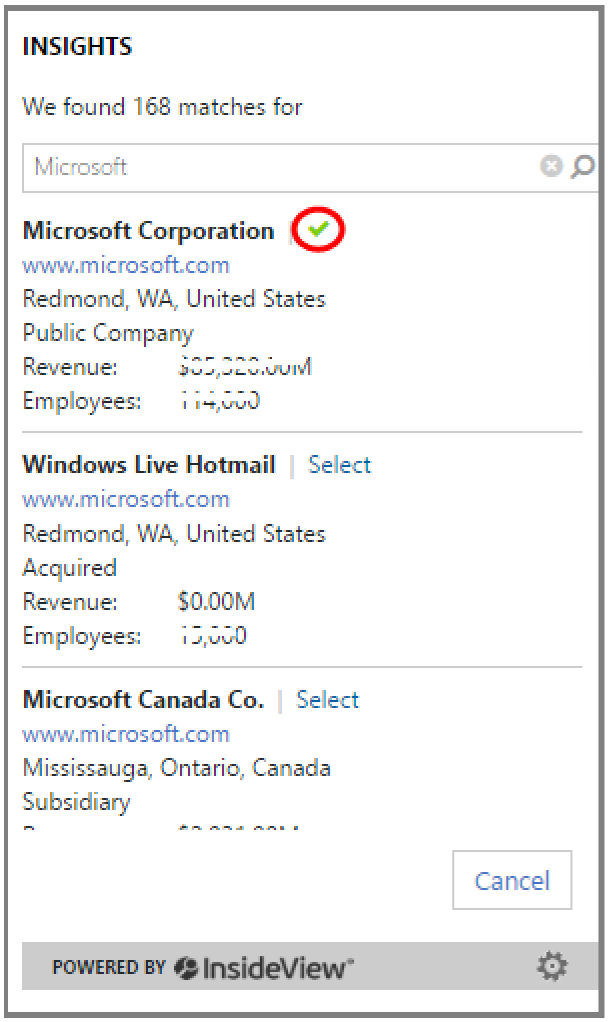
The **Incorrect Company?** or **Incorrect Contact?** button allows you to resolve incorrect company or contact matches by letting you search and select the correct match from a list of matches in the Insights database.

Resolving incorrect company match

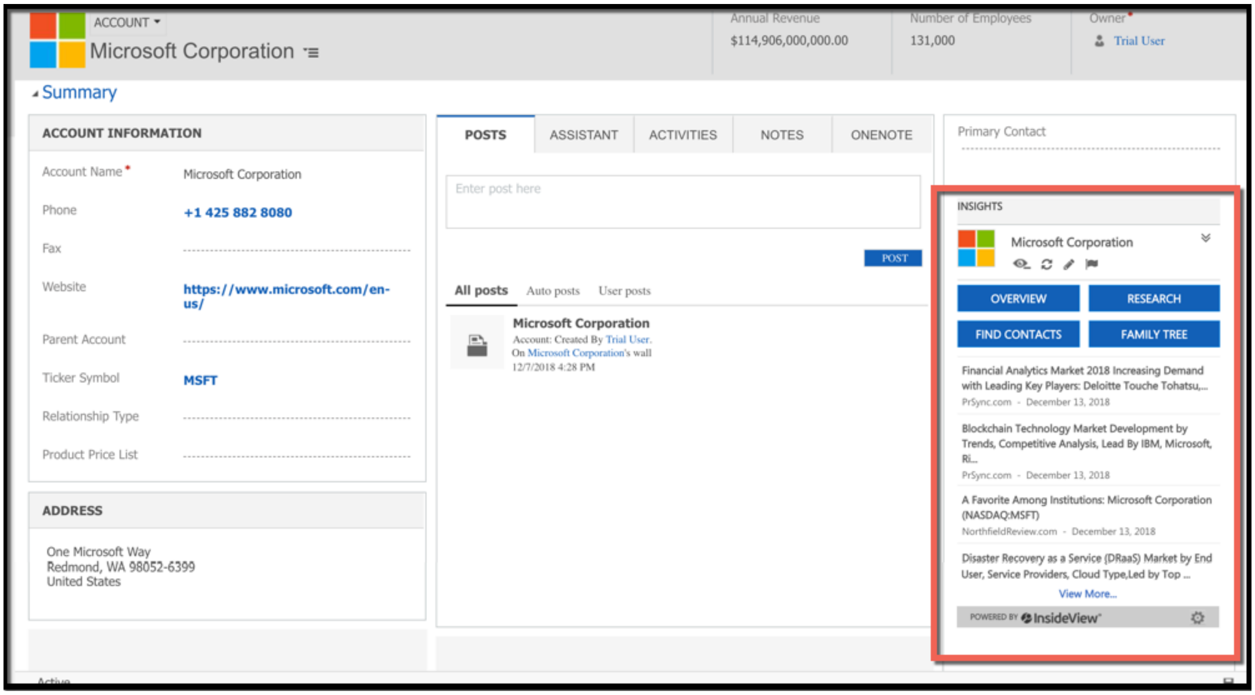
1. Go to the Company Details page for the incorrect company, and then click the **Incorrect Company?** button.



2. Select the correct company from the matches that Insights finds.



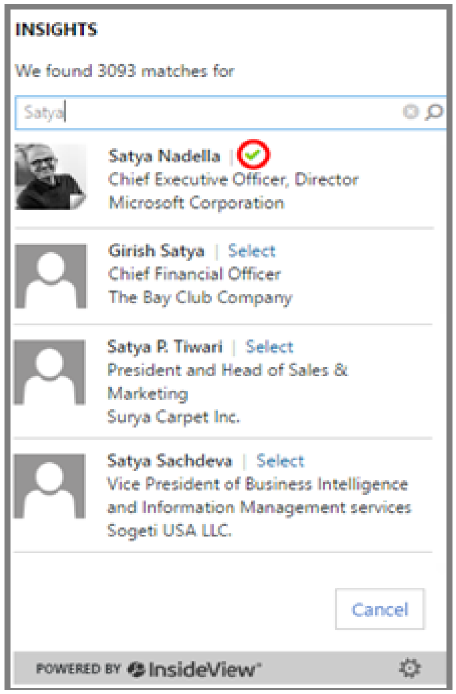
Note: You will see the firmographic data when you create a new account in Dynamics 365.



When you select the company from the list, the firmographic data appears in the Insights pane.

Resolve incorrect contact match

1. Go to **Dynamics 365 > Sales > Contact** and select a contact match.
2. If the Contact Details page has the incorrect match, and then click the **Incorrect Contact?** button.

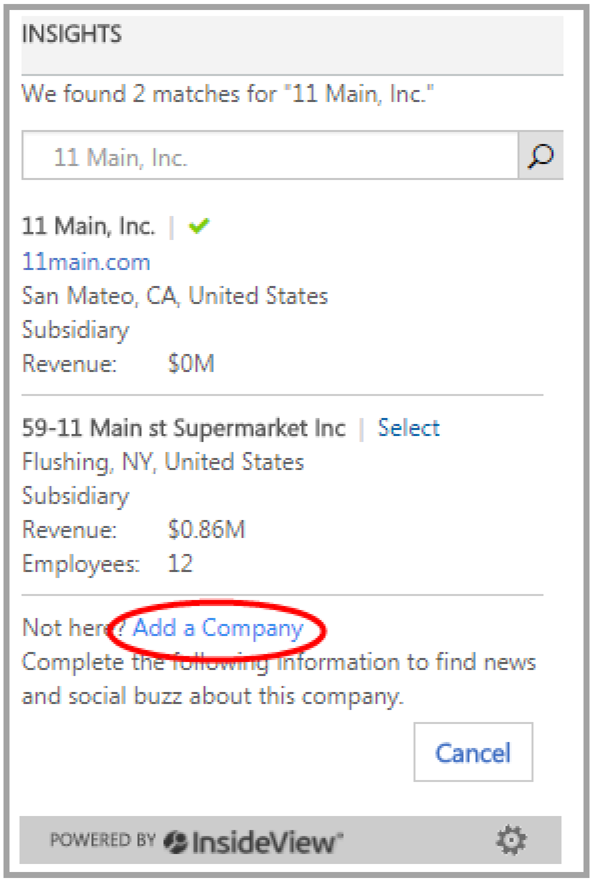


3. Select the correct contact

Add a company

If you don't find a company in the search results for incorrect company, you can add that company data in the Insights database. Here's how:

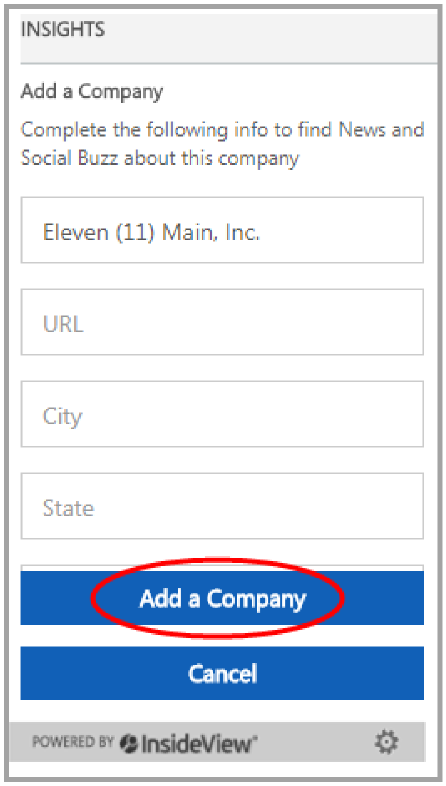
1. Go to the Company Details page that has the incorrect company pairing, and then click the **Incorrect Company?** button.
2. Scroll down to the end of the search results and click the **Add a Company** link.



Note: You will see the **Add a Company** link in the following scenarios:

- When you scroll to end of search results and there are no results to show
- When zero matches are found for a company
- When you see "did you mean?" in search results
- When no recommendation is available for a company

3. In the Add a Company window, enter the company's **name**, **website URL**, **City** and **State** details that you wish to add.

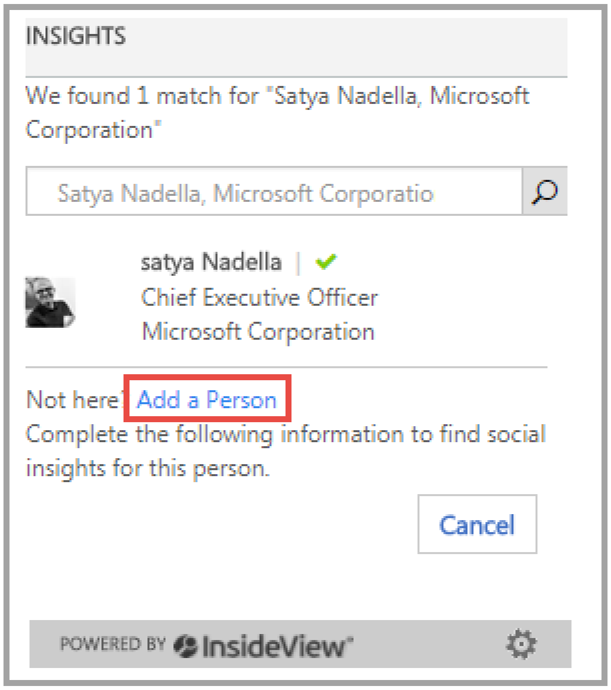


4. Click the **Add a Company** button.

Add a person

If you don't find a contact in the search results for incorrect contact, you can add that contact data in the Insights database. Here's how:

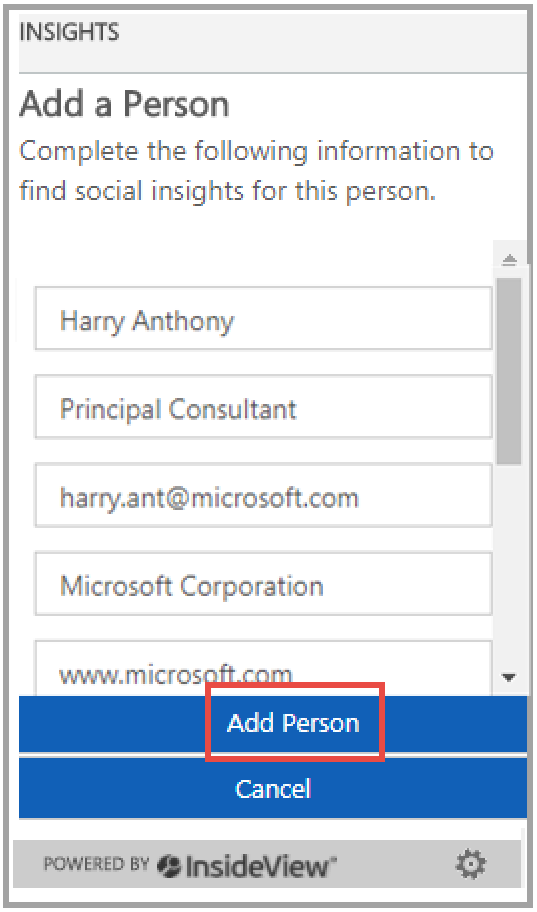
1. Go to the Contact Details page that has the incorrect contact pairing, and then click the **Incorrect Contact?** button.
2. Scroll down to the end of the search results and click the **Add a Person** link.



Note: You will see the **Add a Person** link in the following scenarios:

- When you scroll to end of search results and there are no results to show
- When zero matches are found for a contact
- When you see "did you mean?" in search results
- When no recommendation is available for a contact

3. In the Add a Person window and then enter the person's **name**, **title**, **email**, **website URL**, **Street**, **City**, **State/Province**, **Postal/Zip Code** and **Country** details that you wish to add.



4. Click the **Add a Person** button.

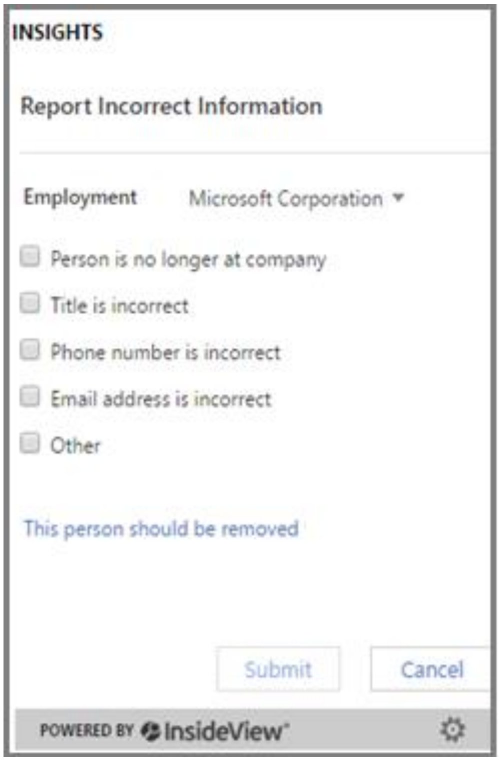
Report incorrect company or contact information

The **Report Incorrect Information** button lets you report company or contact information that you believe is incorrect.
Note: When you report company or contact information, the data in question is sent to a dedicated content engineering team for careful evaluation and research. If the information in Insights is incorrect, the content team will validate the data and update the information accordingly.

Report incorrect contact data

1. Go to the Contact Details page, and then click the **Report Incorrect Information** button.

2. Select the check box by the most appropriate reason (s).



3. If you think a contact should not exist in the context of this company, then click the **This person should be removed** link.

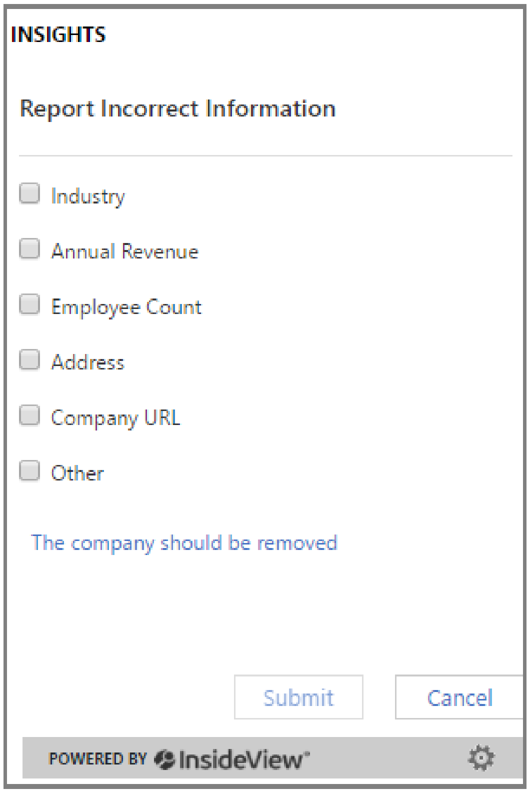
4. When prompted, provide the reason you believe the contact should be removed.

5. Click **Submit**.

Report incorrect company data

1. Go to the Company Details page, and then click the **Report Incorrect Information** button.

2. Select the check box by the most appropriate reason(s).



3. If you believe the company should not be displayed, then click **The company should be removed** link.

4. When prompted, provide the reason you believe the company should be removed.

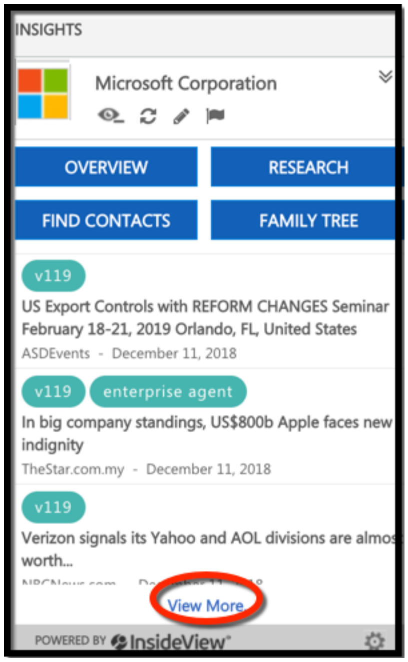
5. Click **Submit**.

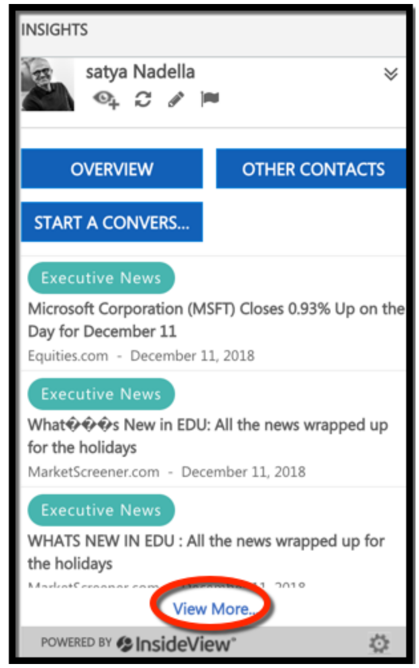
View company or contact news

InsideView Insights lets you view the latest company and contact news feeds, which are updated at regular interval, in Insights. Here's how:

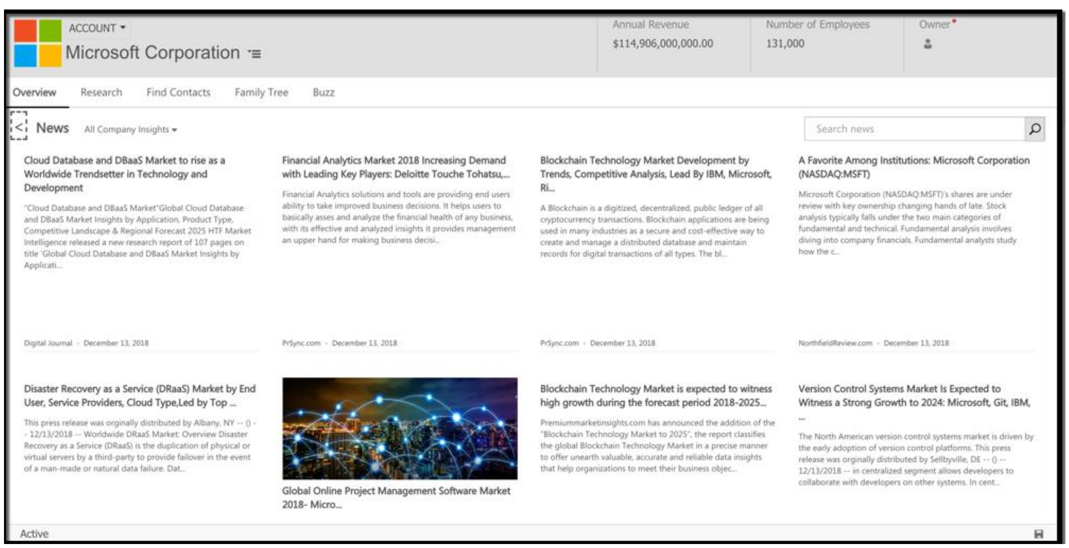
1. Go to the Company Details or Contact Details page in Insights and click the **View More** link.

<u>Company</u> **<u>Contact</u>**





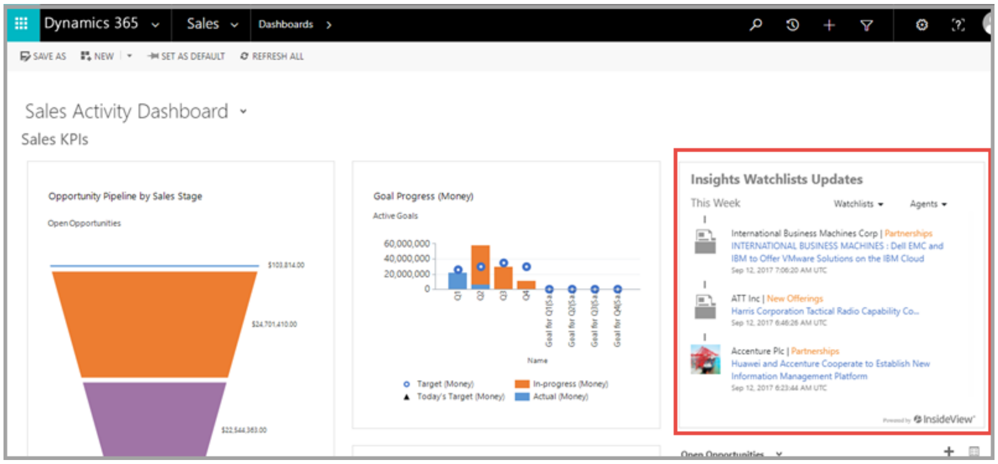
2. The News page opens.



Using the Insights Dashboard Widget

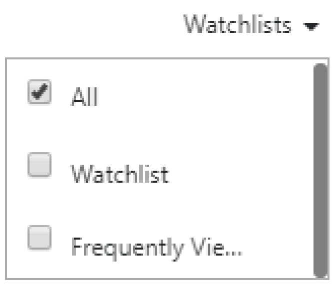
If your CRM administrator has configured the Insights Dashboard widget, then you can view and filter Watchlists Activity stream directly from the Home screen. Here's how:

1. Log in to Dynamics 365.
2. Go to the Microsoft Dynamics 365 home, you will see Insights Watchlist Activity Stream.

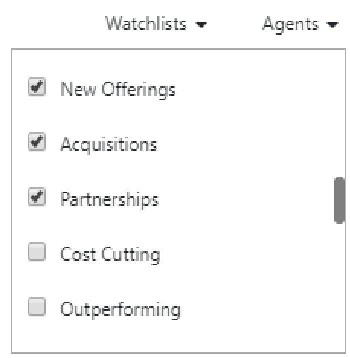


3. Select the filters for Watchlists and Agents by clicking on the **Drop-down** button.

Watchlists



Agents



Chapter 2: Overview tab

This chapter helps you understand the **Overview** tab and how you can use the information on the different sub tabs for business conversations.

Understanding the Overview tab

Use the **Overview** tab to learn more about your target companies and contacts, and plan effective sales strategies. InsideView Insights helps you sell more effectively by finding the right people, identifying your mutual connections, and informing you about them so you can quickly and easily establish rapport and build credibility.

These are some things you can do in the Overview tab:

- Discover connections to key people in your target accounts through the people you know as well as your contacts.
- Learn about your prospects and customers through firmographics data, latest company news and key contacts to start your business conversations.
- Find new prospects, plan account strategies and keep tabs on key target accounts based on technologies they use that are relevant for your sales and marketing teams.
- Discover subsidiaries, acquisitions, international divisions, and a host of other corporate relationships.

The **Overview** tab includes three types of information. Each gives you a different perspective and information about a company and a contact.

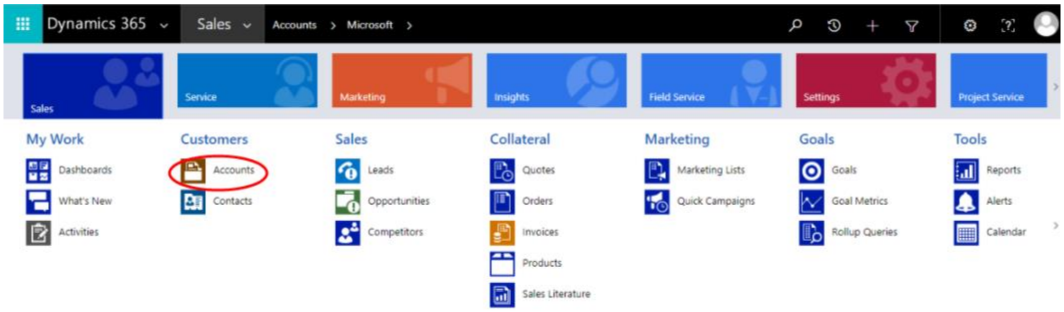
- Firmographics
- News
- Key Contacts

Getting to company and contact overview

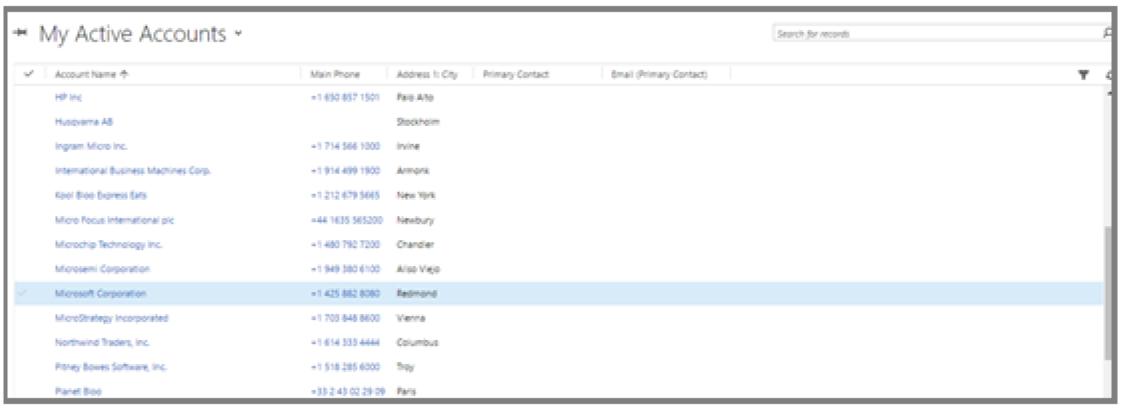
The **Overview** tab on a company and contact entity lets you view the latest news and important events.

Find company insights

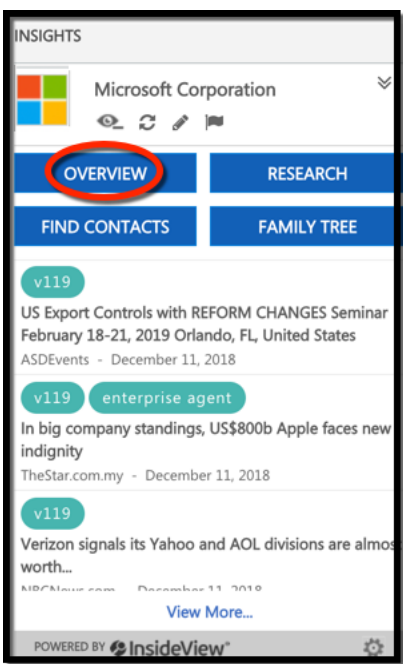
1. On the navigation bar, click **Dynamics 365** solution that you are using.
2. Select the **Sales** work area. The work area name appears in the navigation bar.
3. Click the work area name, and then click **Accounts**.



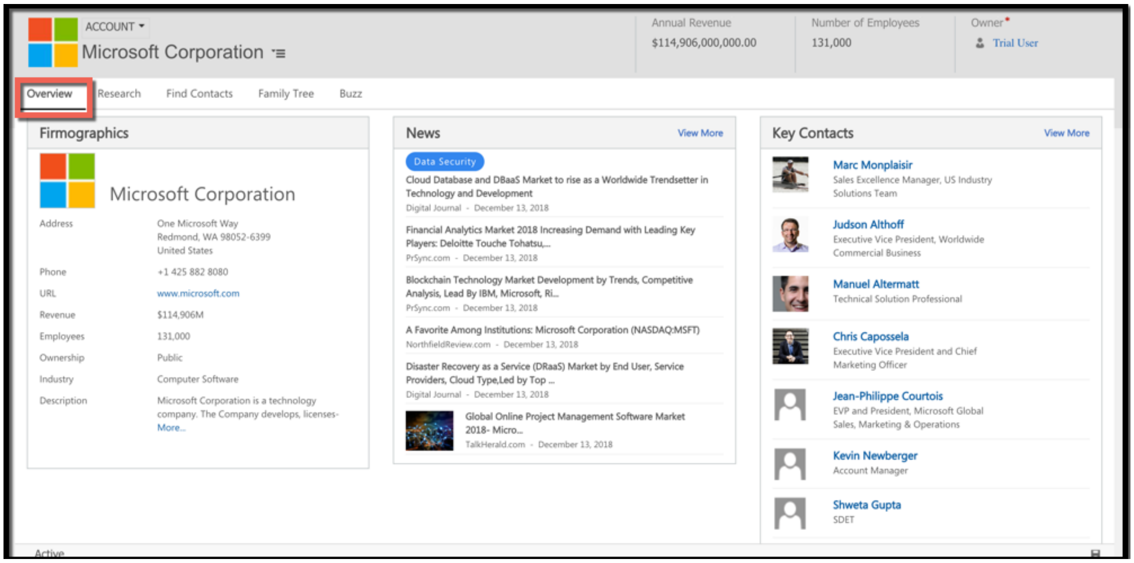
4. On the My Active Accounts page, open an account.



5. **Insights** for this company shows on the right side of the page.

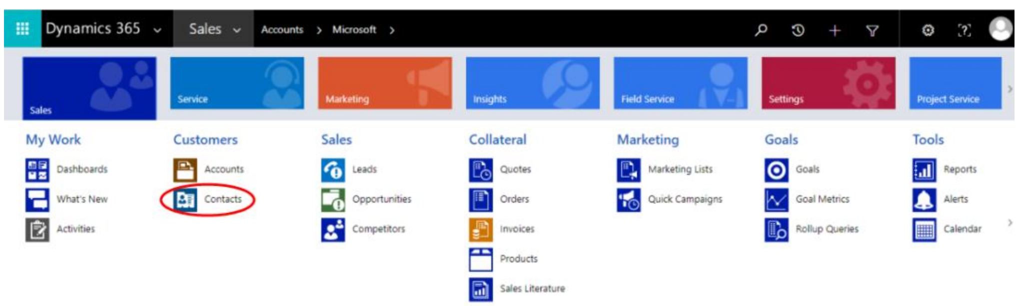


6. To view company' firmographic data, news and key contacts, click **Overview**.

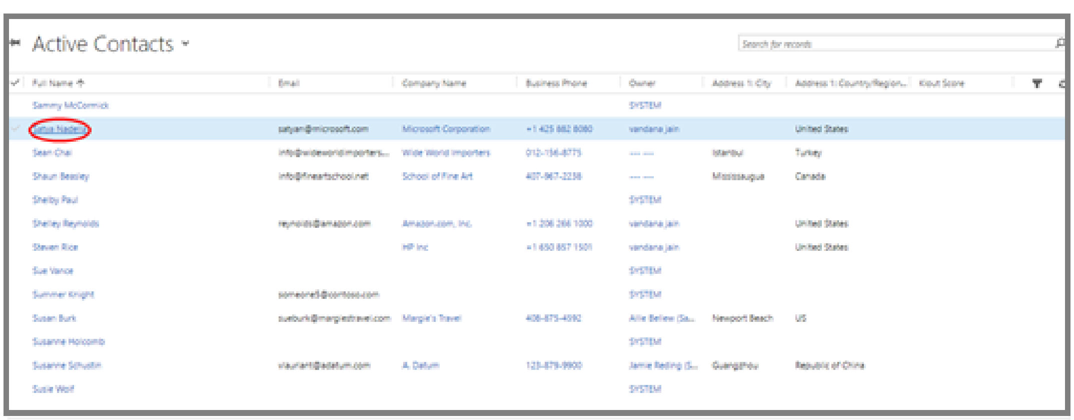


Find contact insights

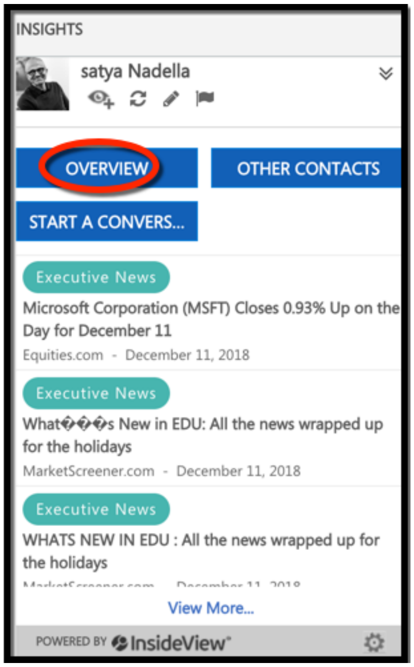
1. On the navigation bar, click **Dynamics 365** solution that you are using.
2. Select the **Sales** work area. The work area name appears in the navigation bar.
3. Click the work area name, and then click **Contacts.**



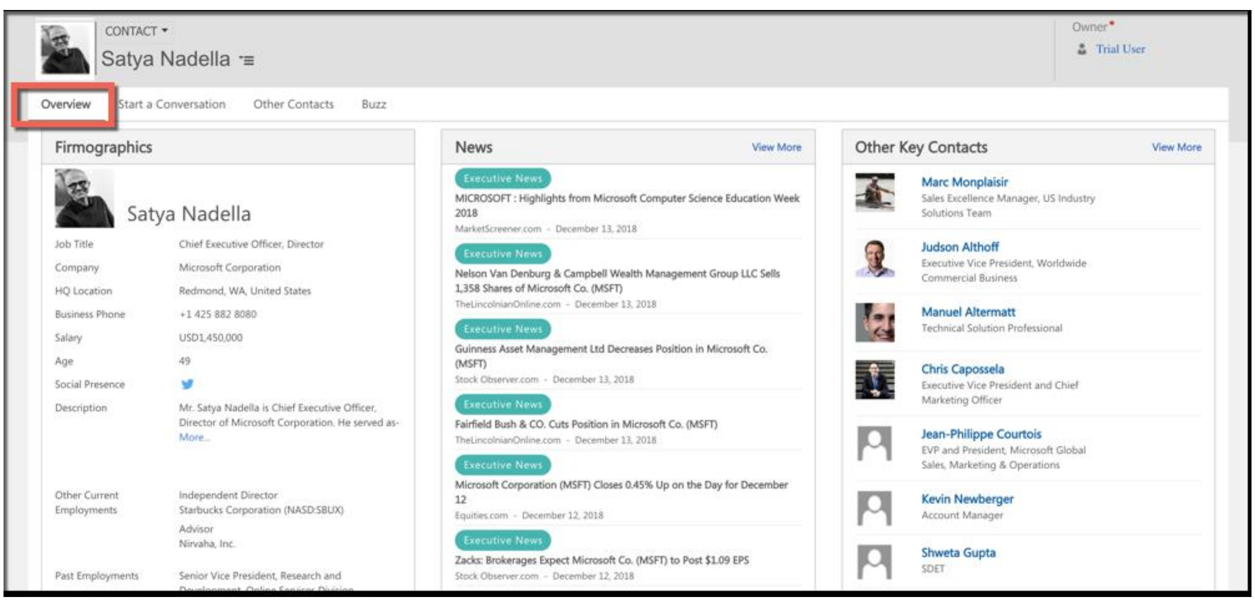
4. On the My Active Contacts page, select a contact.



5. Click the **Overview** button to view contact’s firmographic data, news and key contacts.



6. The Insights page for the contact opens.



7. Click the **Start a Conversation** tab to view contact’s firmographics, news, and key contacts.

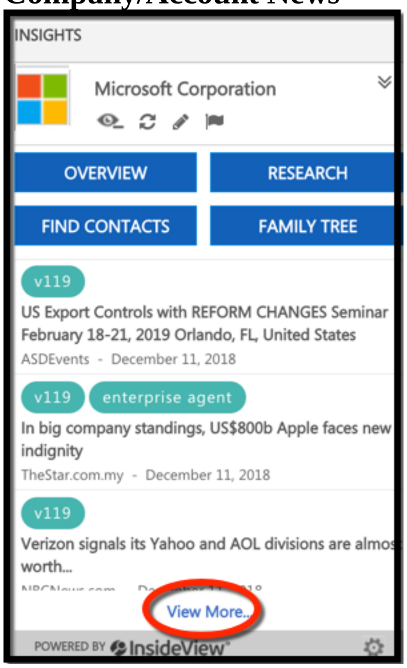
8. Click the **Buzz** tab to add Facebook and Twitter social media feeds.

News subtab

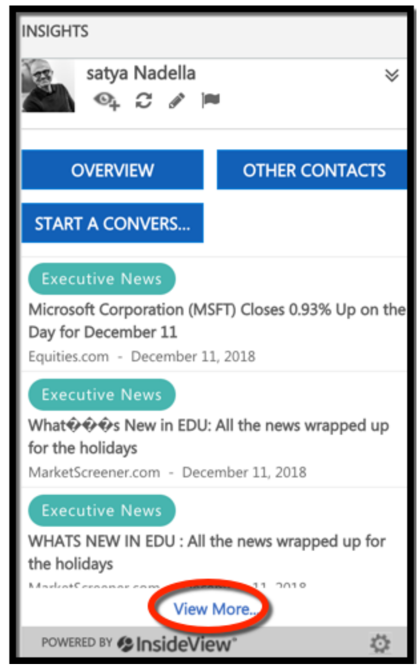
The **News** subtab displays news articles related to the selected company, and lets you complete the following:

- Read news about important business events.
- Read recent news articles on the company.
- Find conversation starters.
- Filter news using Company Insights categories (English only).
- Share company and contact news articles on Facebook, Twitter, LinkedIn, and Yammer, or email the news article link.

Company/Account News



Contact News



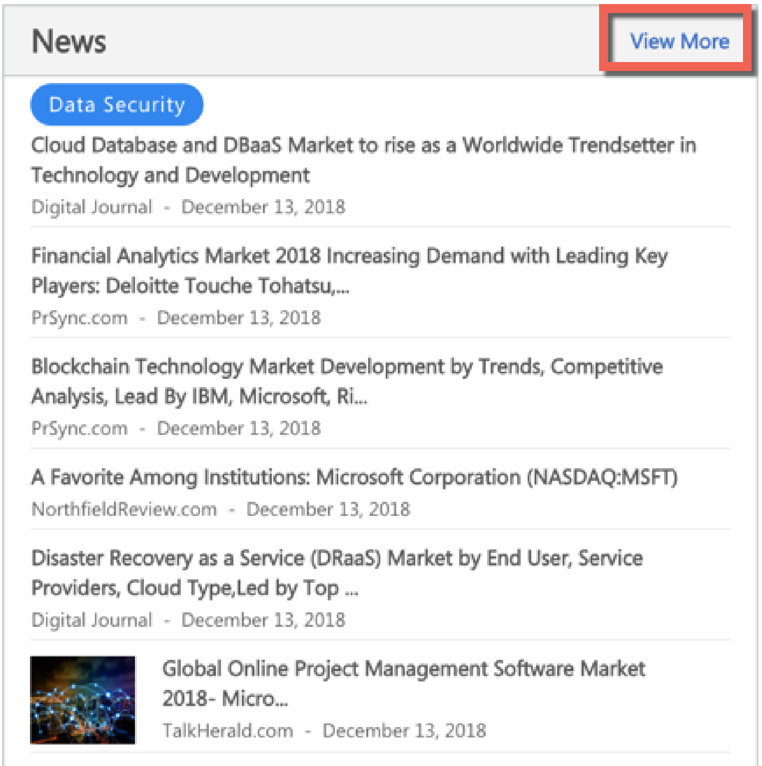
The most recent articles appear first in the list. To view other articles, click the **View More** link.

Share news articles on social media platform

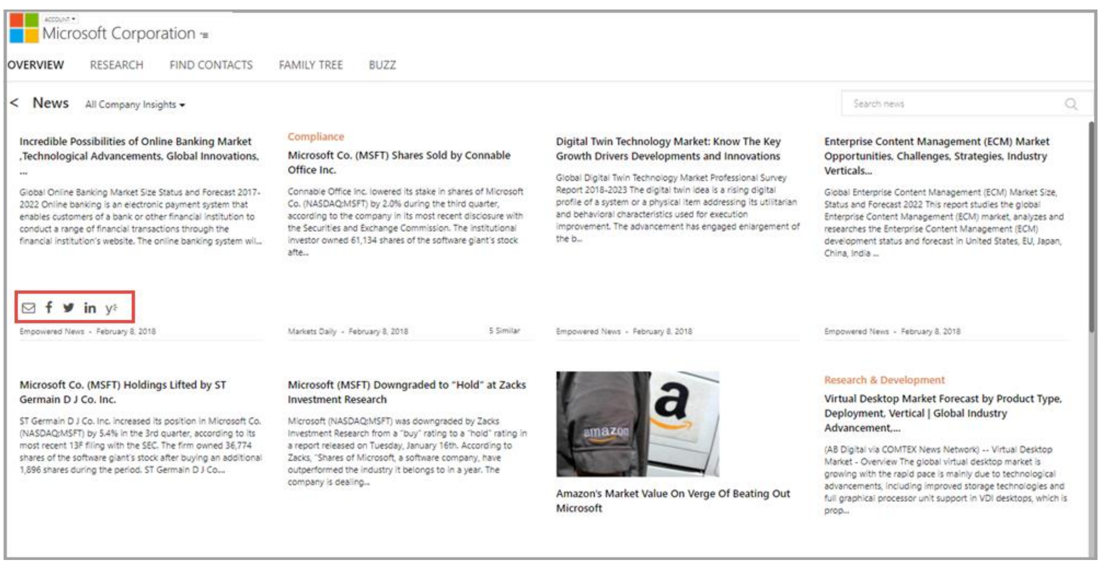
You can use the **News** subtab to share news articles from Insights on different social media platforms. Here's how:

1. Go to the News page of an account or a contact. Getting to company and contact overview section for more information.

2. In the **News** section, click the **View More** link to open the News page.

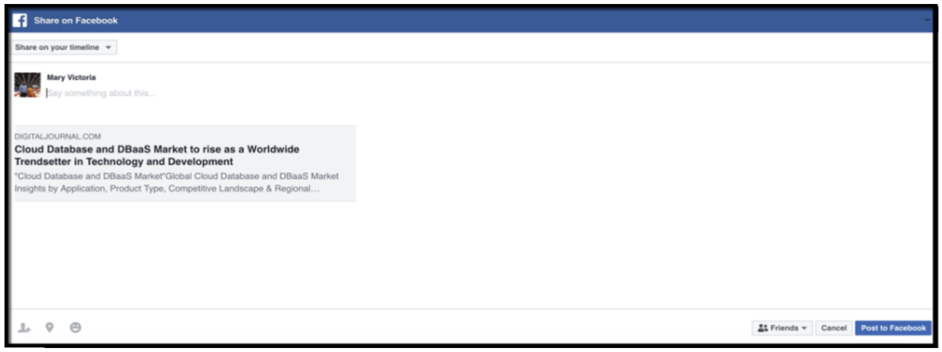


3. To share a news article, move your mouse over the news.



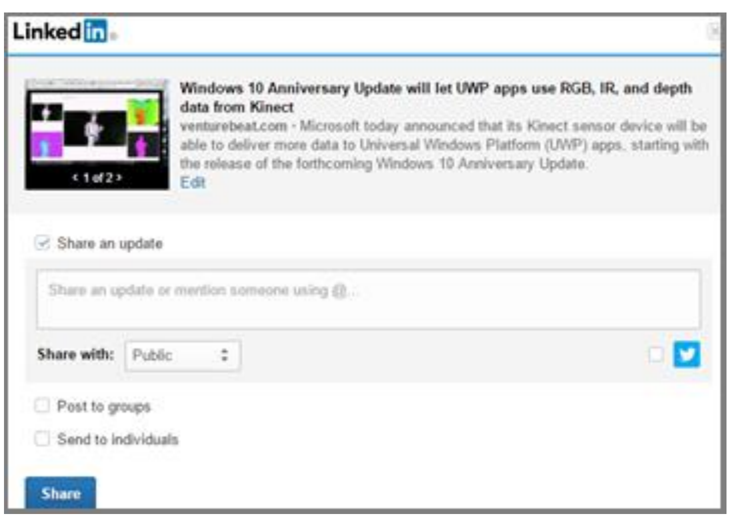
4. Share the news article through any of the following social platforms:
   - **Email.** Enter email addresses for all the recipients you want to send the news article to.

- **Facebook.** Sign in with your Facebook account credentials and share the article on your Facebook timeline.

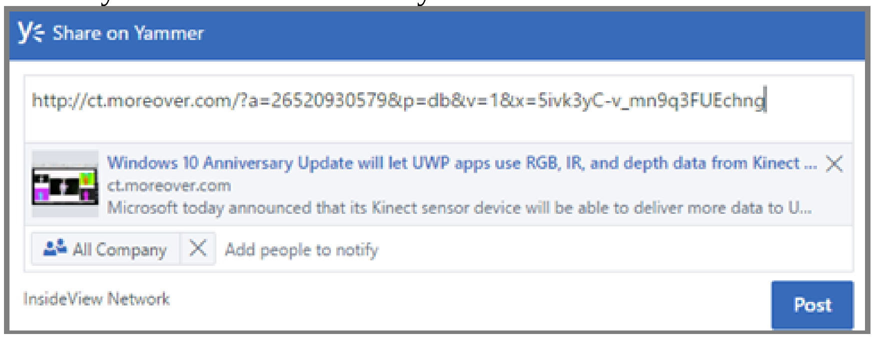


- **Twitter**. Sign in with your Twitter account credentials and share the article with your followers.

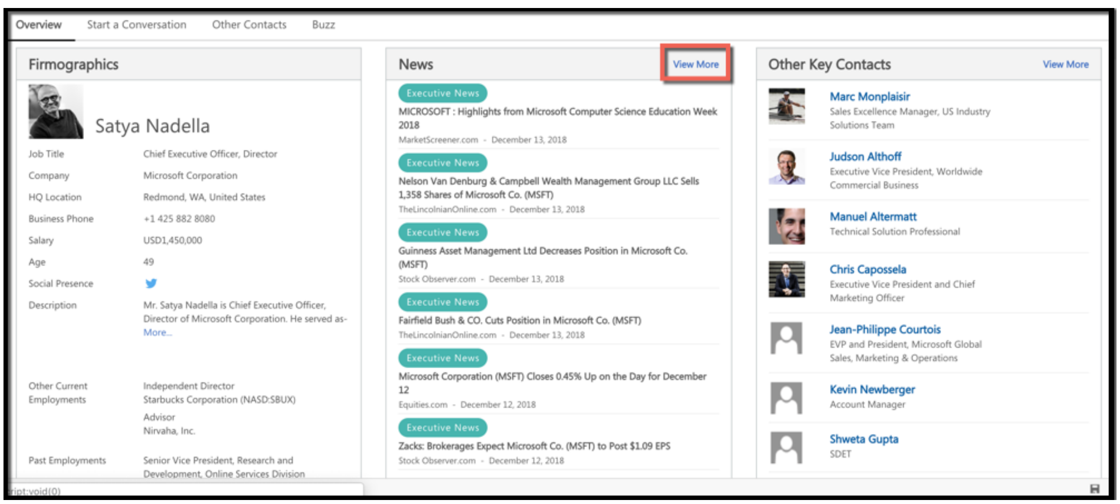
- **LinkedIn**. Sign in with your LinkedIn account credentials and share the article with your LinkedIn connections.



- **Yammer**. Sign in with your Yammer account credentials and share the article with your Yammer community.



5. Repeat the previous steps to share news about a contact that you are following.



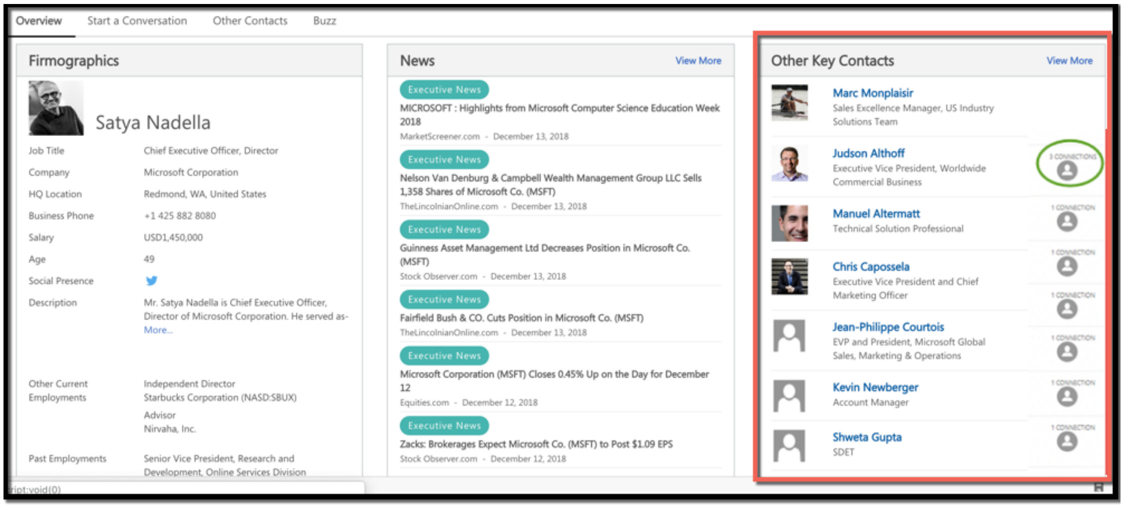
Key Contacts subtab or Other Contacts

Check the **Key Contacts** subtab for the names of key decision makers at the company and to do any of these things:

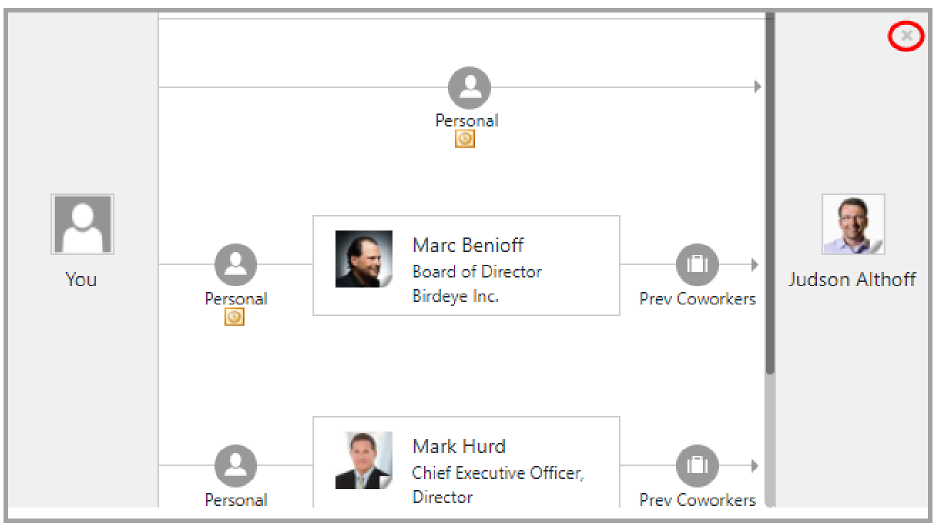
- View key executives and decision makers who work for that company.
- View connections only if you are connected to that contact
- Filter contacts by job functions and levels.
- View other contacts in the company that you want to target.

Company Key Contacts

1. To view key contacts at a company, and their brief bio click the Key Contacts region as illustrated.



2. On the Connections pop-up window, review the contacts.



3. Click **Close**.

4. To view other key contacts, click the **View More** link.

Note: You can now launch Other Contacts tab for contact and lead entities.

Chapter 3: Buzz tab

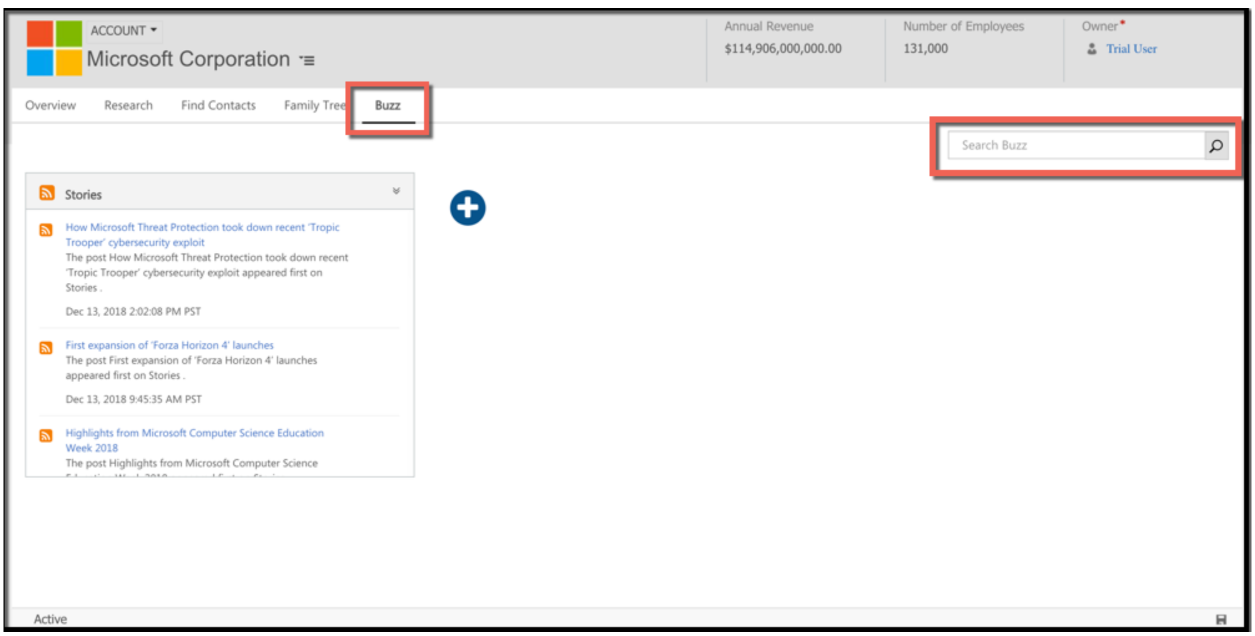
The **Buzz** tab shows you the latest blog posts, Facebook posts, and Tweets made from the company's official accounts as well as posts and Tweets made by others *about* the company.

Understanding the Buzz tab

The **Buzz** tab allows you to open the company's Facebook page or follow it on Twitter, and do any of the following:

- Review latest posts and tweets about the company.
- Follow the company's Twitter profile.
- Search within news and social media feeds.
- Engage with the company directly on Twitter (replies, re-tweets) and Facebook (likes and posts).

Company's Buzz Page

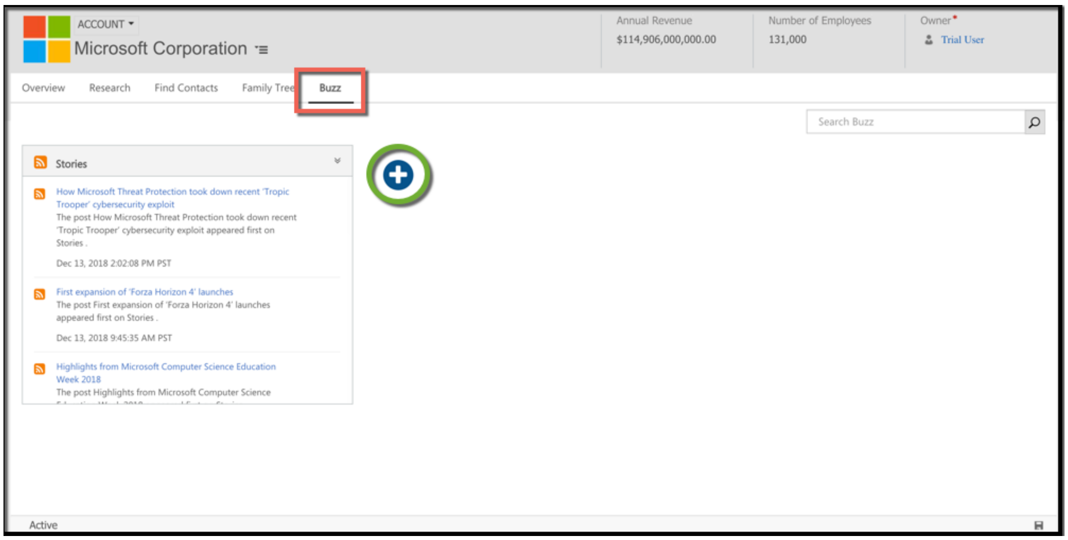


Note: You must authenticate with your personal Twitter and Facebook accounts to use Buzz features. Insights will prompt you to sign in to these accounts if you haven't done so. Insights will never post to your social networks without your permission.

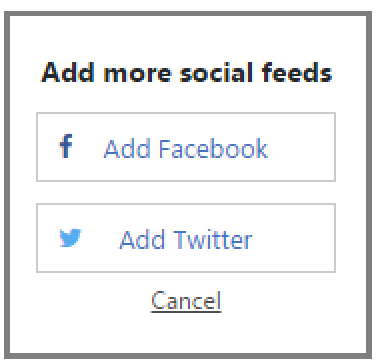
Set up your social feeds

You can use InsideView Insights to set up the social media feeds to view the trending news on an accounts or contact's Facebook or Twitter page. Here's how:
By default, social media feeds are available, your Dynamics CRM administrator can turn them off.

1. Go to the Company's or Contact's Overview tab/page, and then click the **Buzz** subtab.
2. Click the **Add** button + and add the social media page for that company or contact.



3. To include the social feeds, click **Add Facebook** and **Add Twitter** account.



4. To complete the news feed additions, sign in with your Facebook or Twitter account credentials.

5. Drag and drop the news columns to arrange them however you like.

Chapter 4: Start a Conversation

This chapter helps you understand the **Start a Conversation** tab and how you can use the contact and lead details in different sections to start business conversations.

Start a Conversation with Contacts

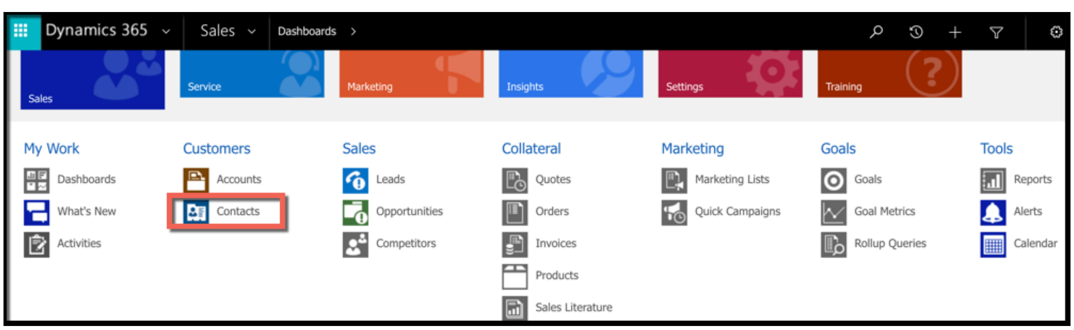
Use InsideView Insights for contacts and leads to identify conversation starters with the following data about a contact:

- View all contact information, including email address, and phone number, as well as employment and education details.
- View how you are connected with that particular contact.
- View blog feeds of the contact.
- Add Facebook, Twitter and call preparations questions to keep track of the latest news about your prospects.
- Add a call reminder, send an email, create a task and schedule a meeting to start a business conversation.

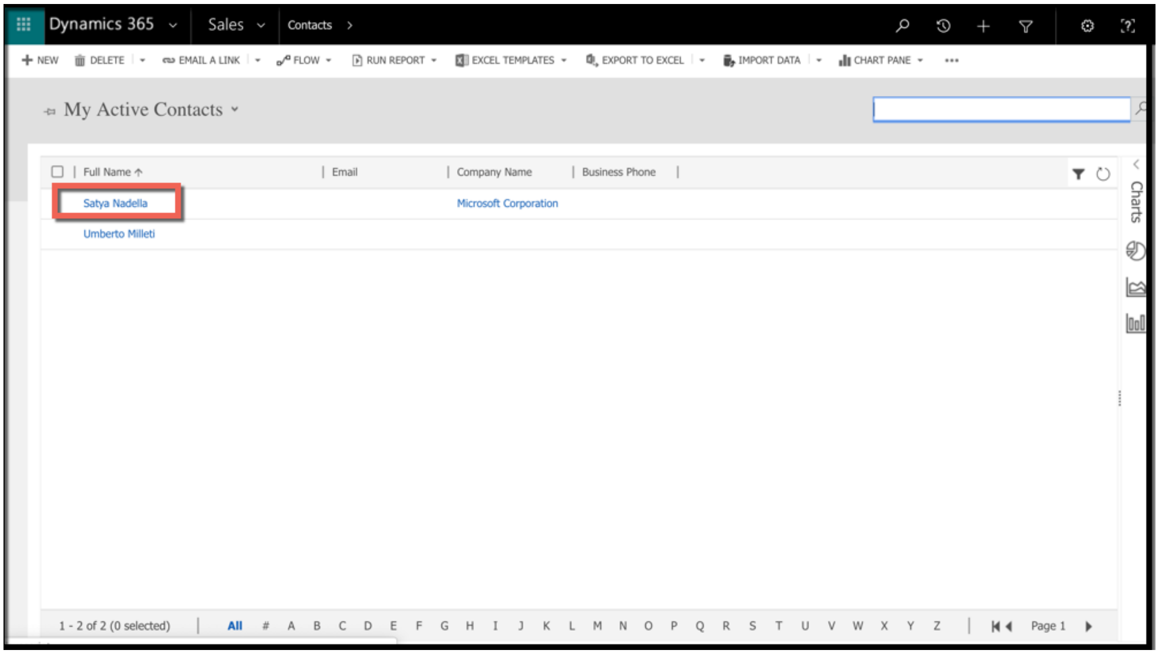
Getting to Start a Conversation with Contacts

From the **My Active Contacts** page you can view contact details to engage with a prospect. Here's how:

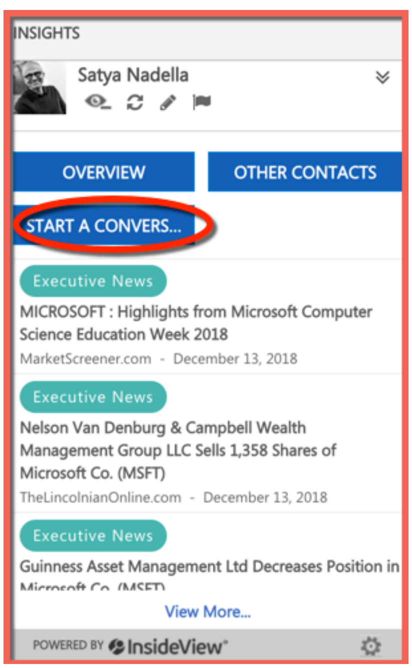
1. On the navigation bar, click **Dynamics 365** solution that you are using.
2. Select the **Sales**, **Service**, or **Marketing** work area. The work area name appears in the navigation bar.
3. Click the work area name, and then click **Contacts**.



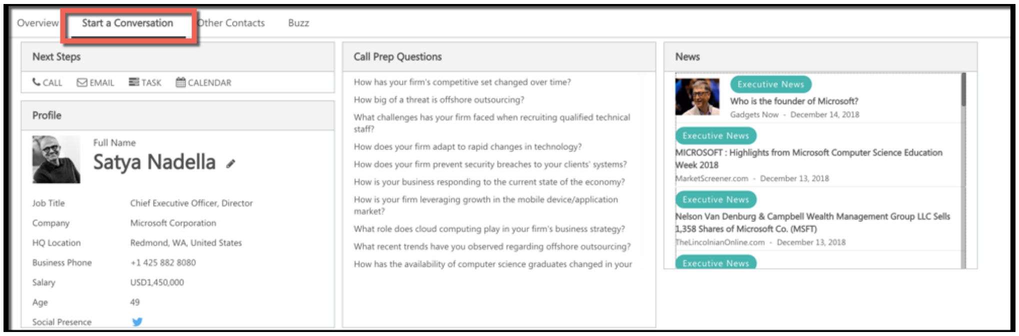
4. On the My Active Contacts page, select a contact.



5. Click the **Start a Conversation** button to view news, key contacts, and social news feeds.



6. The Contact Details page shows the important details that you can use to start a conversation and become familiar with the prospect.



Start a Conversation with Leads

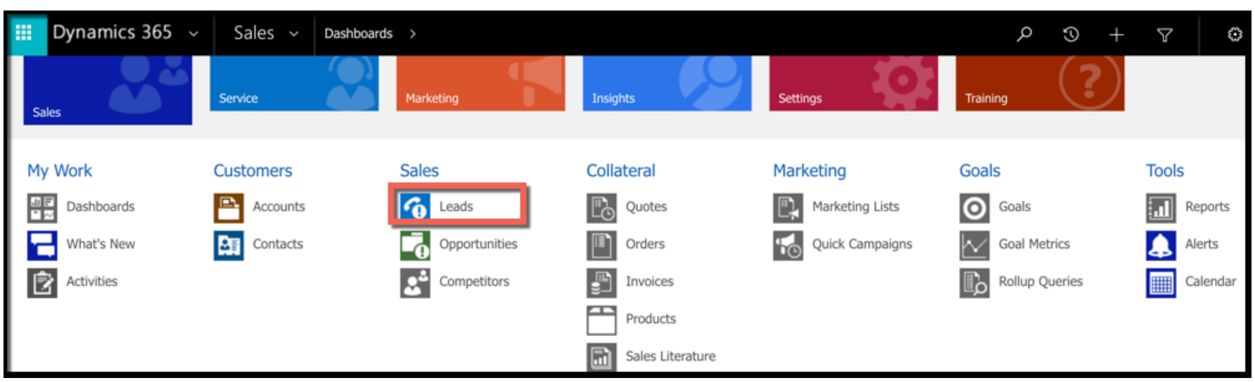
The Start a Conversation page provides the following about a lead:

- Leads 's summary details
- Options to qualify, develop, propose and close the lead
- See company as well as contact pairing

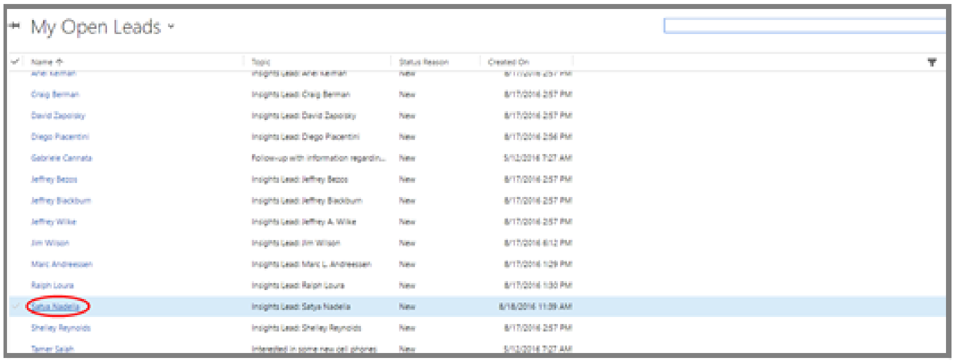
Getting to Start a Conversation with Leads

From the **My Open Leads** page, you can view lead details to start a conversation. Here's how:

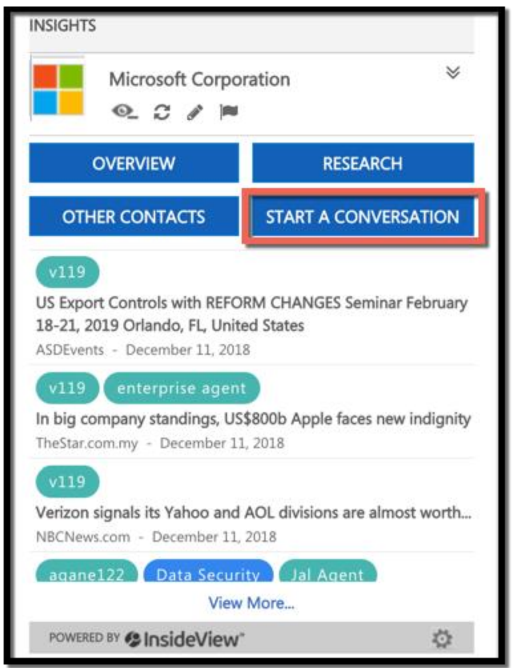
1. On the navigation bar, click **Dynamics 365** solution that you are using.
2. Select the **Sales**, **Service**, or **Marketing** work area. The work area name appears in the navigation bar.
3. Click the work area name, and then click **Leads**.



4. On the My Open Leads page, select a lead.



5. In Insights, click the **Start a Conversation** button to view news, key contacts, and social news feeds.



6. Follow the instructions in the Getting to Start a Conversation with Contacts to add Facebook, Twitter, Blog and Call Prep questions widgets.

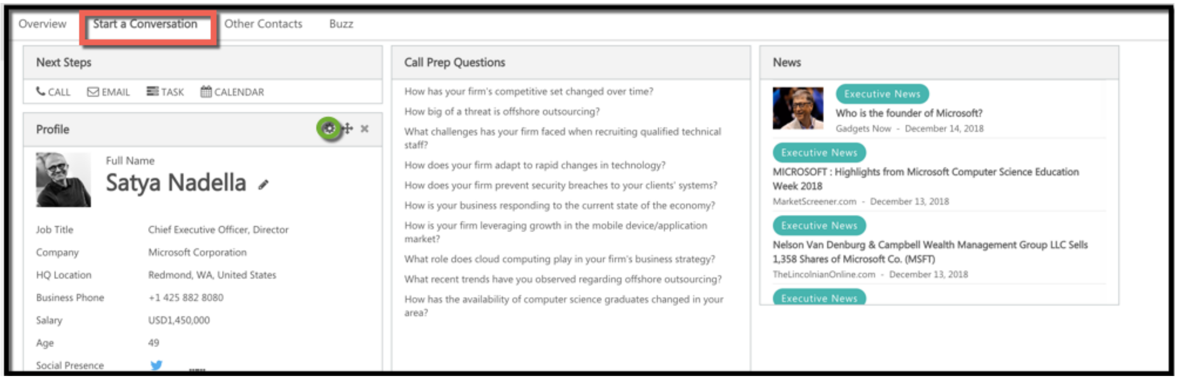
7. Follow the instructions in the Start a Conversation Actions section to create call reminder, send an email, create a task and schedule a meeting with the lead.

Edit Contact Profile Settings

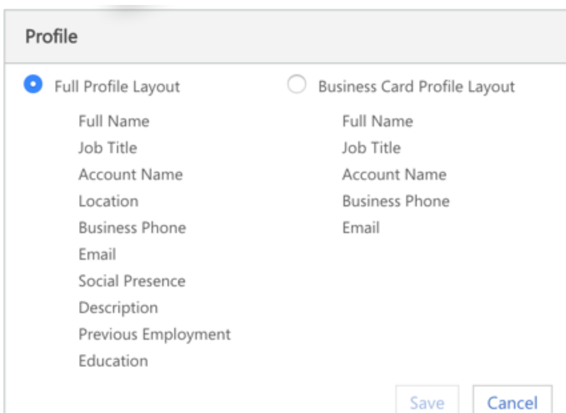
Edit a contact's profile settings to change the view in the Start a Conversation tab. Here's how:

1. Go to the Start a Conversation page of a contact.

2. Click the **Edit Profile Settings** button.



3. Select the **Full Profile Layout** or the **Business Card Profile Layout** view.

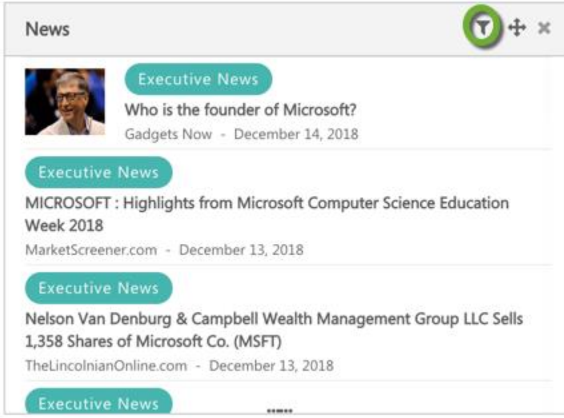


4. Click **Save**.

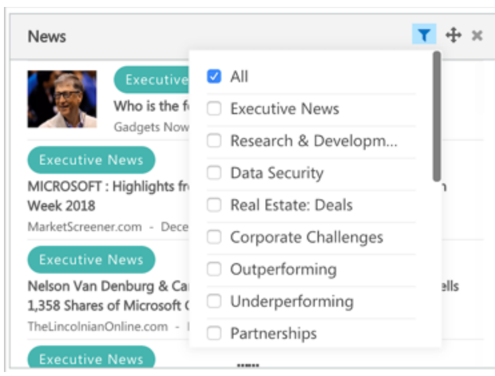
Filter New Feeds

Use filters to view a contact's news feeds based on search agents. Here's how:

1. To filter the news feed, navigate to the Start a Conversation tab by following the instruction in the Getting to Start a Conversation with Contacts section.



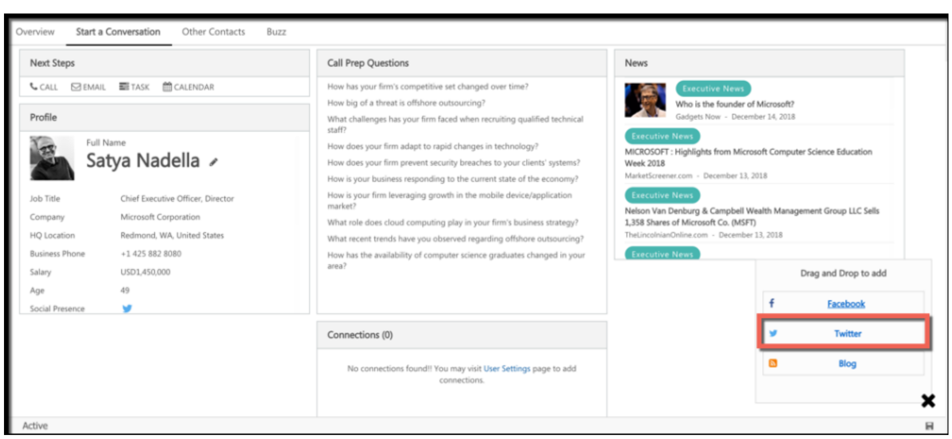
2. Click the **Filter News** button to select the search agents for the news. Read the Company Insights section for more information about agents.



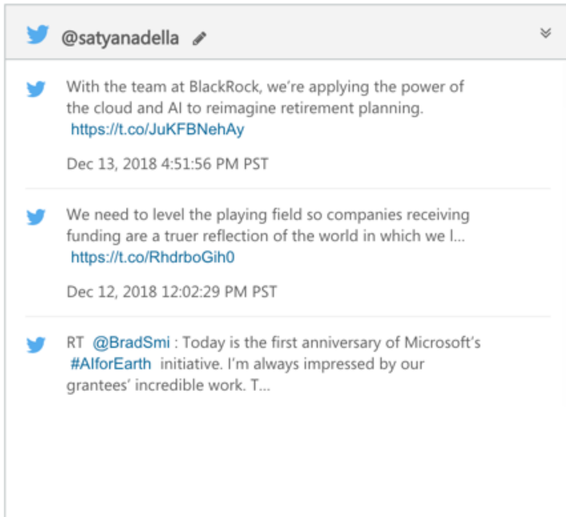
3. Select any filter to view the news feeds relevant for your business requirements

Add Contact's Twitter Feed

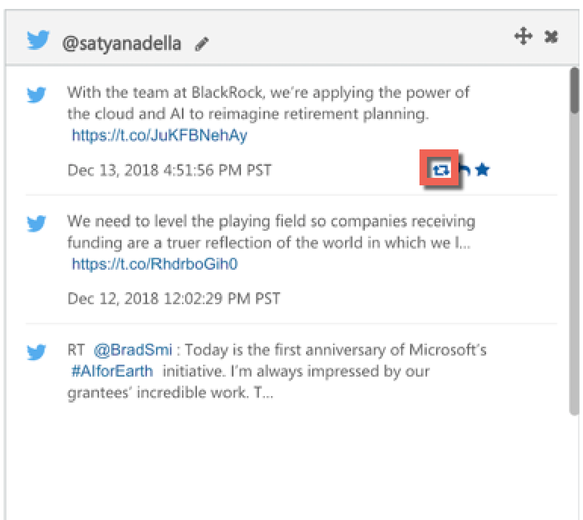
1. To add the Twitter feed, navigate to the Start a Conversation tab by following the instruction in the Getting to Start a Conversation with Contacts section.
2. Click the **Add** button, then drag and drop the **Twitter** widget.



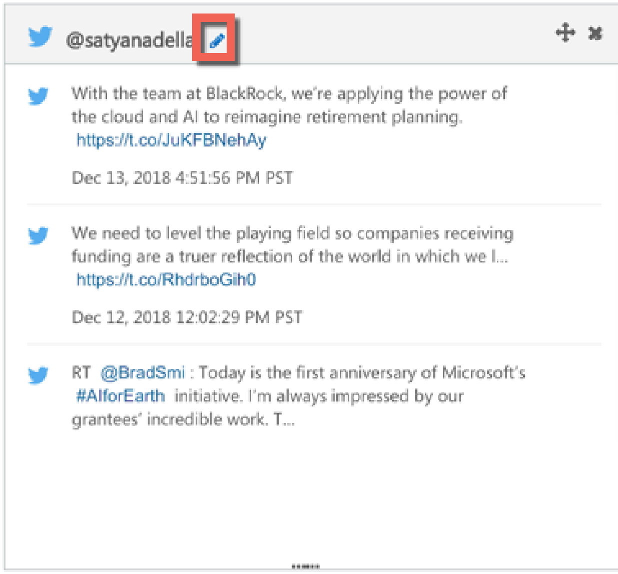
3. The contact's Twitter posts are displayed once you authorize Insights' access to Twitter from your account.

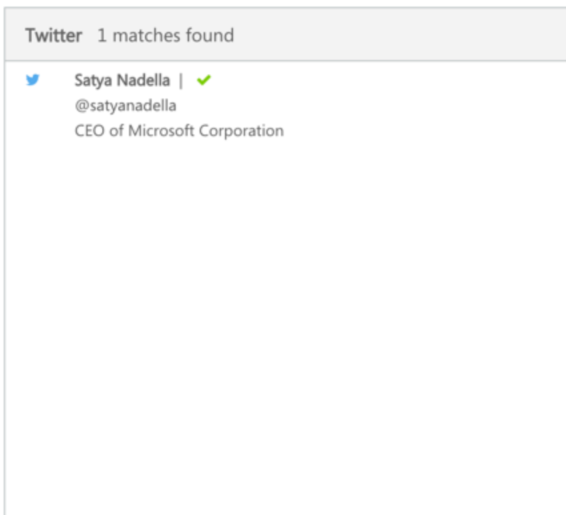


4. To interact with the Twitter feed, select a tweet and click the **Retweet**, **Reply**, or **Favorite** button to repost the item.

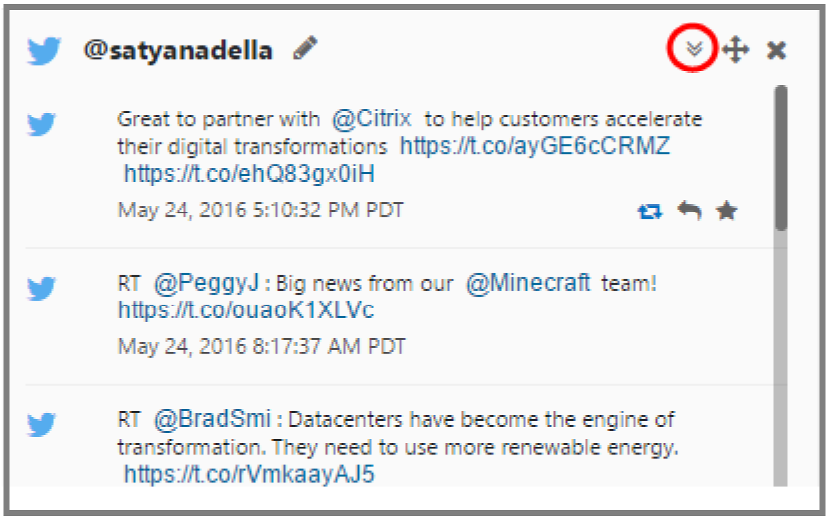


5. To edit the contact information, click the **Edit** button and select the correct contact match.

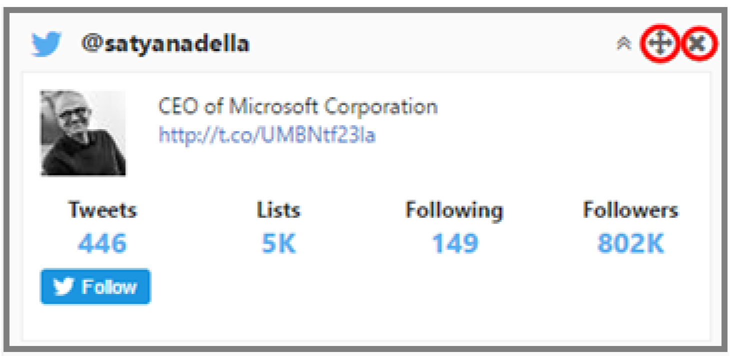




6. To view the Twitter account summary, click the **Chevron** button.



7. The contact's Twitter account overview page appears.



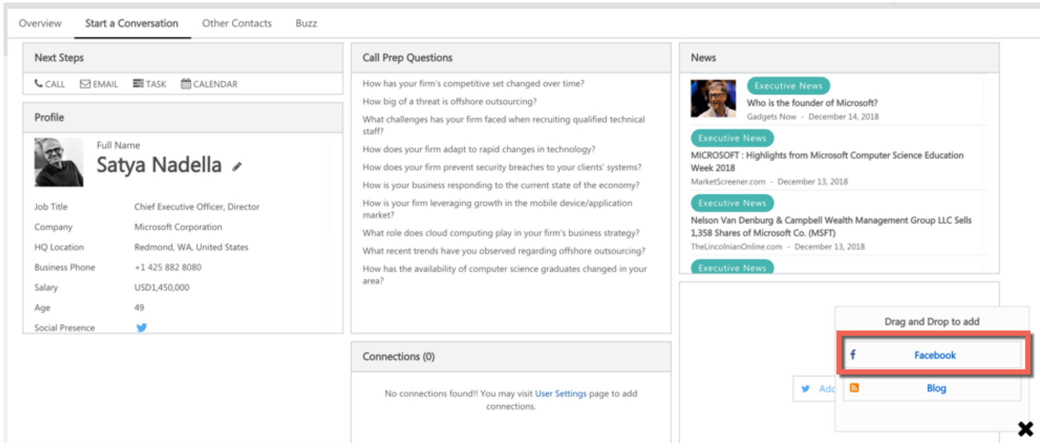
8. To move the Twitter widget within the Contact Details page, click the **Move** button.

9. To remove the Twitter widget, click the **X Remove** button.

   Note: You can edit, expand/collapse posts, move, or remove Facebook, Blog and Call Preparation questions in the Contacts Details page by following steps described in this section.

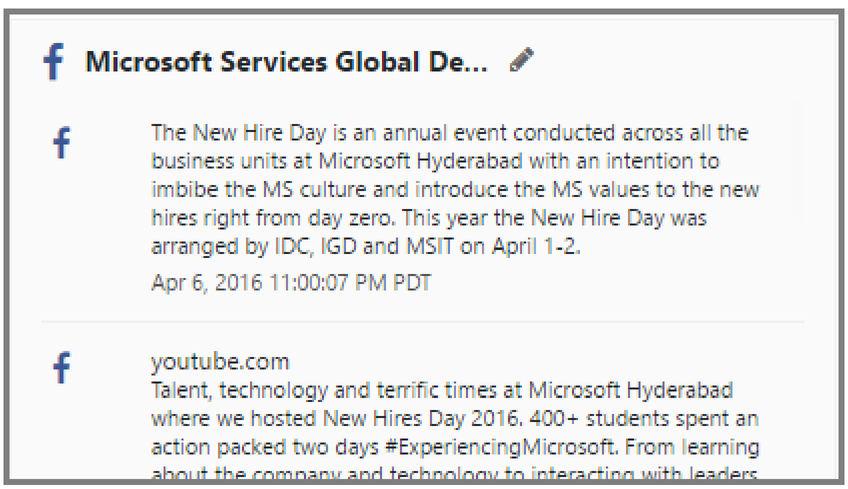
Add Contact's Facebook Feed

1. To add the Facebook feed, navigate to the Start a Conversation tab by following the instruction in the Getting to Start a Conversation with Contacts section.
2. Click the **Add** button, then drag and drop the **Facebook** widget onto the Contact Details page.



3. If you are adding the Facebook feed for the first time, you will need to sign in to your Facebook account and authorize Insights to post feeds.

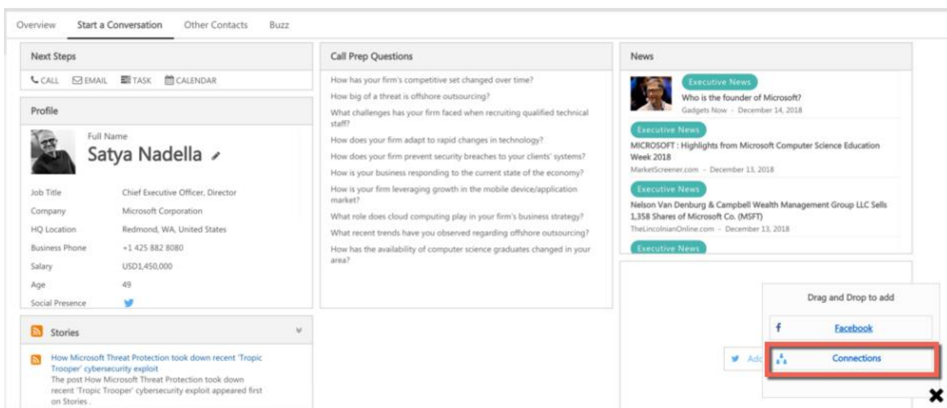
   Note: Adding the Facebook widget only lets you add the company's Facebook page with latest feeds and not the contact details.



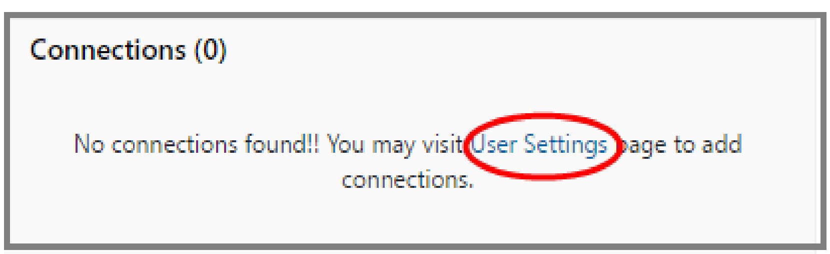
4. To comment or like a Facebook post, select a feed and click the **Like** button.

Add Connections

1. To add the connections, click the **Add** button, then drag and drop the **Connections** item.



2. If there are no connections for a contact, the following message appears:

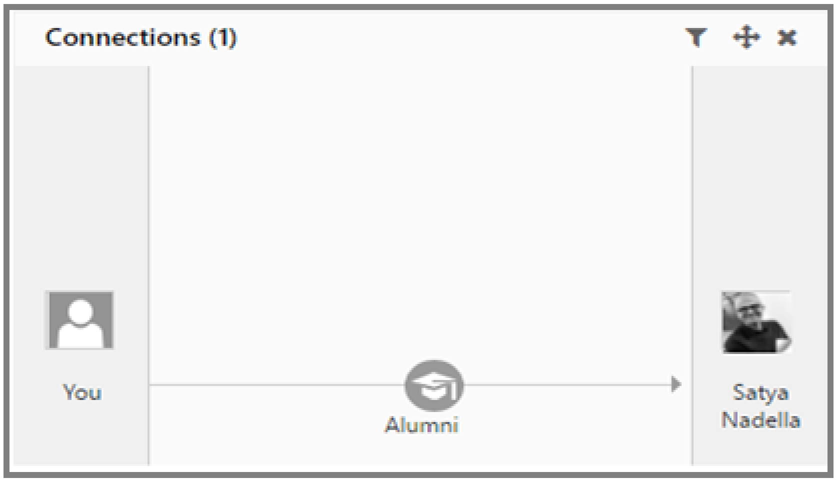


3. To add connections from your previous work history, education, or people you know, read the respective section from Set up your connections.

Filter Personal Connections

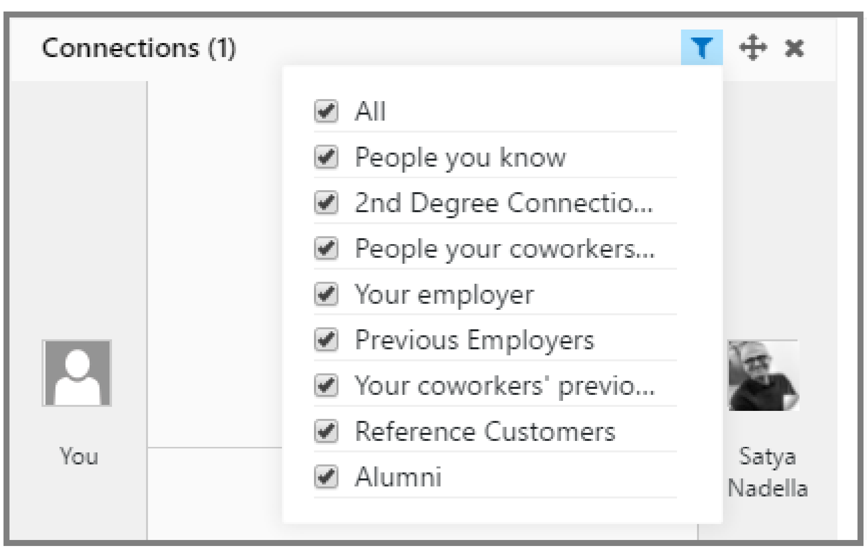
Use filters to view a contact's personal connections. Here's how:

1. Go to the Start a Conversation tab for a contact and select the connections section.



2. Click the  **Filter Connections** button and select any of the following items to filter:

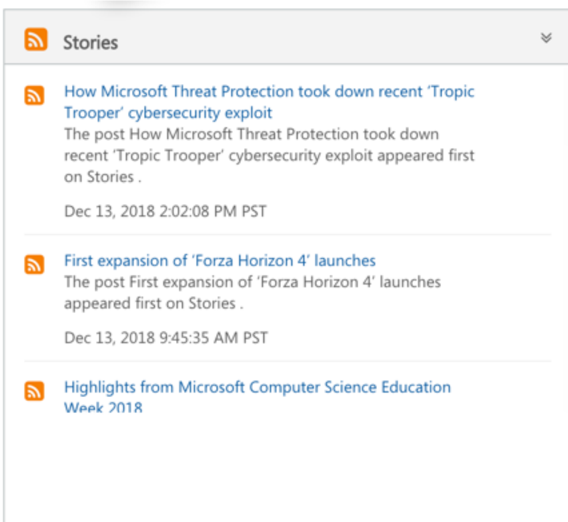
- **All** to see all connections
- **People you know** to see all people contact might know
- **2nd Degree Connections** to see all second-level connections
- **Your coworkers** to see coworkers of a contact.
- **Previous Employers** to see connections from a contact's previous employers.
- **Your coworker's previous employers** to see connection from your coworker's previous employers.
- **Reference Customers** to see contacts from your company's reference customers.
- **Alumni** to see connections from you college alumni network.



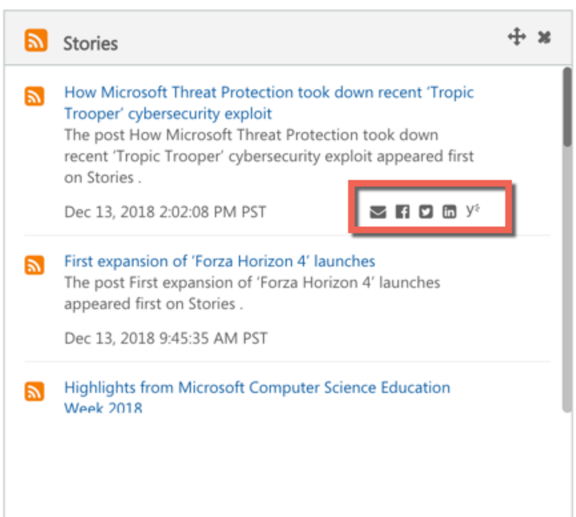
Share Blog Posts

Share the blog posts of your contact on social media websites. Here's how:

1. To share blogs, you must drag and drop blog posts within Insights. These blogs will appear in the Start a Conversation page.



2. To share a blog via Email, Facebook, Twitter, LinkedIn and Yammer, select a blog post.

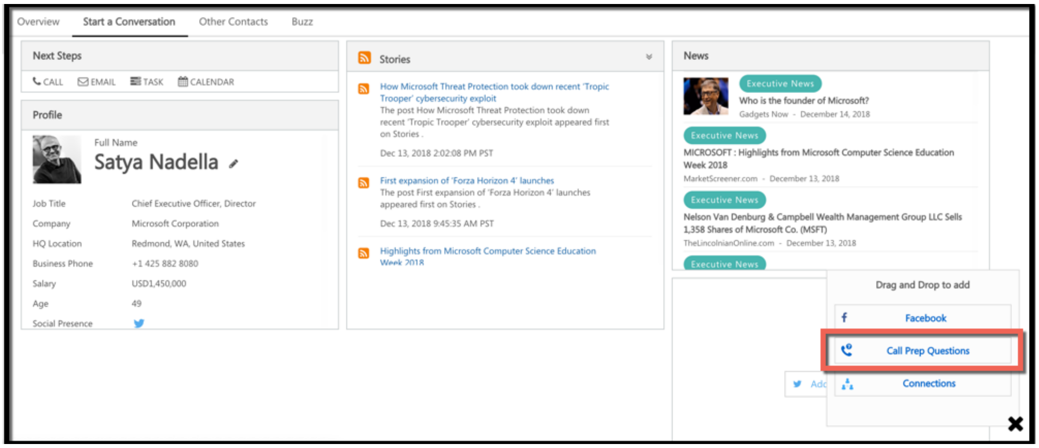


3. Click the preferred social media network or email icon to share the post.

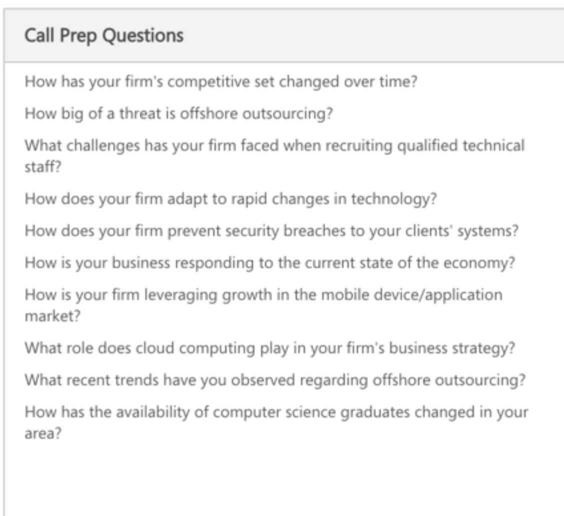
4. For more information and social network specific instructions, see the [Share news articles on social media platforms] section.

Add Call Preparation Questions

1. To add Call Preparation Questions, click the **Plus** button, then drag and drop the **Call Prep Questions** widget.



2. The Call Preparation questions are displayed.



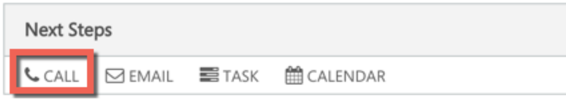
Start a Conversation Actions

Use the information in the various sections of a contact's Start a Conversation tab to start a business conversation. Here's how:

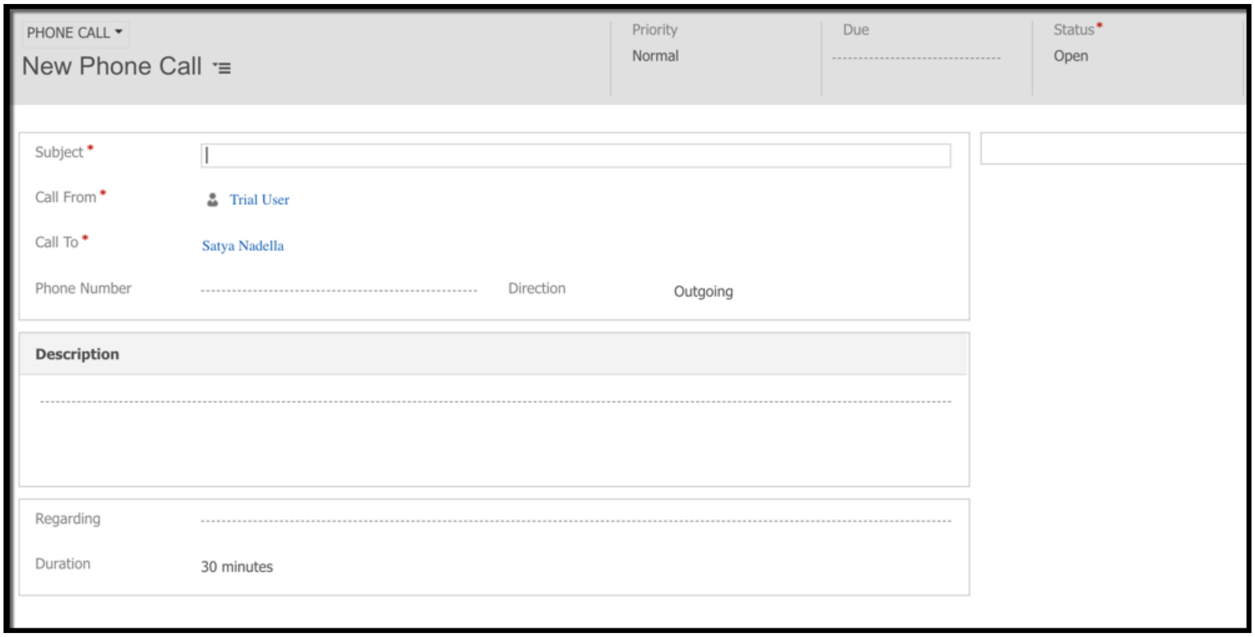
Create a Call Reminder

1. Navigate to the Start a Conversation tab by following the instruction in the Getting to Start a Conversation with Contacts section.

2. Click the **Call** button under the Next Steps section.



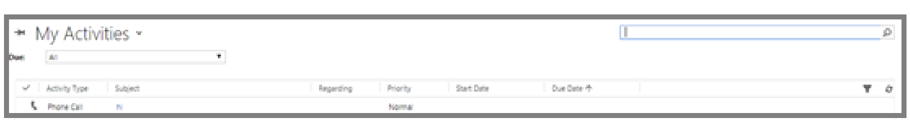
3. The New Phone Call pop-up window opens.



4. Enter the following details:
   - **Subject:** the purpose of the call.
   - **Call From:** the person's email who wants to call.
   - **Call To**: the recipient's email or name.
   - **Description**: the reason for your call.
   - **Others Values:** specify the values that are needed for other fields as appropriate.

5. Click **Save**.

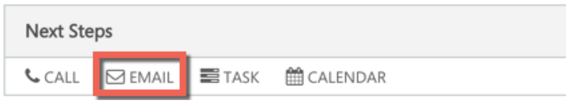
   Note: A reminder to call the contact is created in the **CRM** > **Service** > **Activities** page.



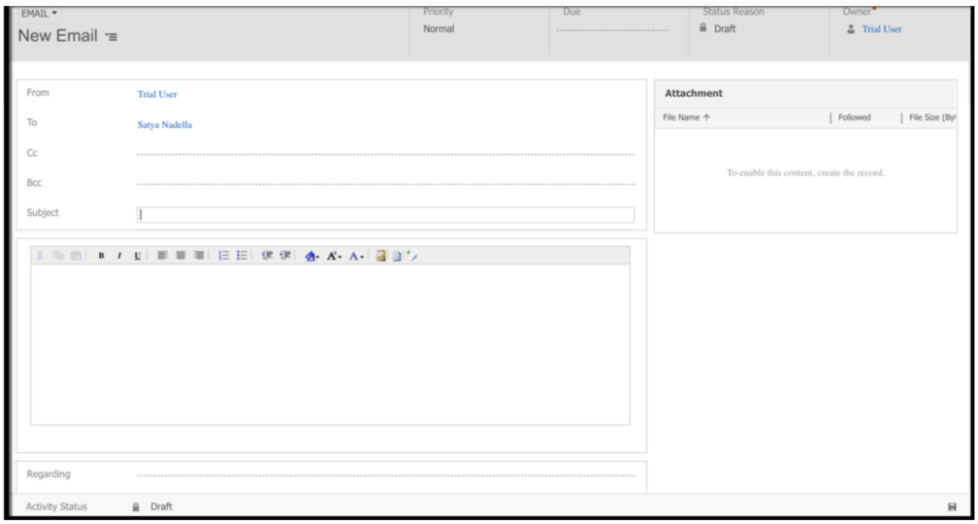
Send an Email

1. Navigate to the Start a Conversation tab by following the instruction in the [Getting to Start a Conversation with Contacts](#) section.

2. Click the **Email** button under the Next Steps section.



3. The New Email pop-up window opens.



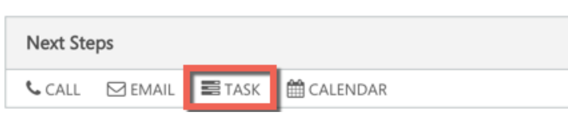
4. Enter the following information:
   - **From:** the sender's email.
   - **To**: the recipient's email.
   - **Cc** and **Bcc:** email addresses of persons whom you want to mark a copy to.
   - **Subject:** the purpose of your email.
   - **Description**: The body of email.

5. Click **Send**.

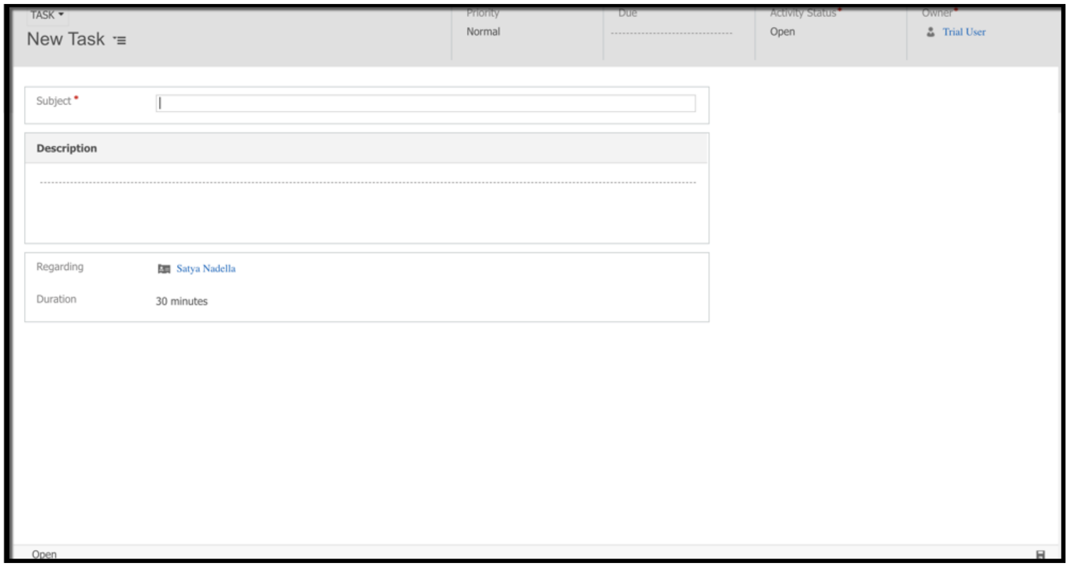
Assign a Task

1. Navigate to the Start a Conversation tab by following the instruction in the Getting to Start a Conversation with Contacts section.

2. Click the **Task** button under the Next Steps section.



3. The New Task pop-up window opens.



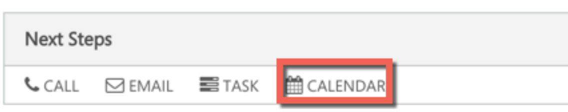
4. Enter the following information:
   - **Subject:** the purpose of your email.
   - **Description:** the body of email.
   - **Duration:** the duration of the task.

5. Click **Save**.

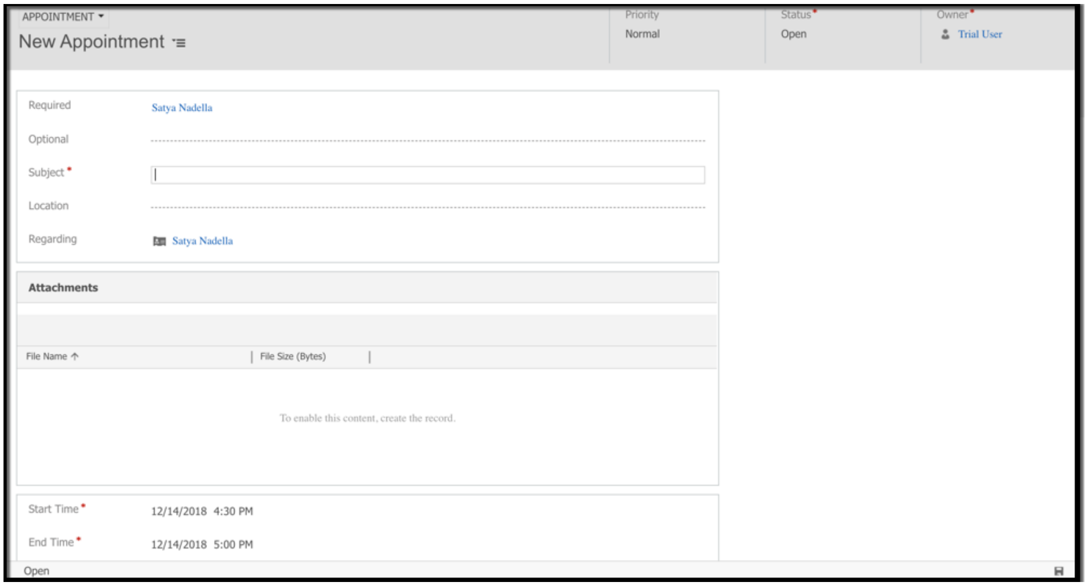
Schedule a Meeting

1. Navigate to the Start a Conversation tab by following the instruction in the Getting to Start a Conversation with Contacts section.

2. Click the  **Calendar** button under the Next Steps section.



3. The New Appointment pop-up window opens.



4. Enter the following information:
    - **Required:** the recipient's email who all are required to attend.
    - **Optional:** recipients email who are optional.
    - **Subject:** the purpose of your email.
    - **Location:** the location of your meeting
    - **Regarding:** The body of the email.

5. Click **Save**.

Chapter 5: Research

This chapter helps you understand how to use the **Research** tab to learn more about companies you're interested in so you can build stronger relationships and win more deals.
Note: The **Research** feature is available for Account, Lead and Opportunity work areas that have the company entity type.

Understanding the Research tab

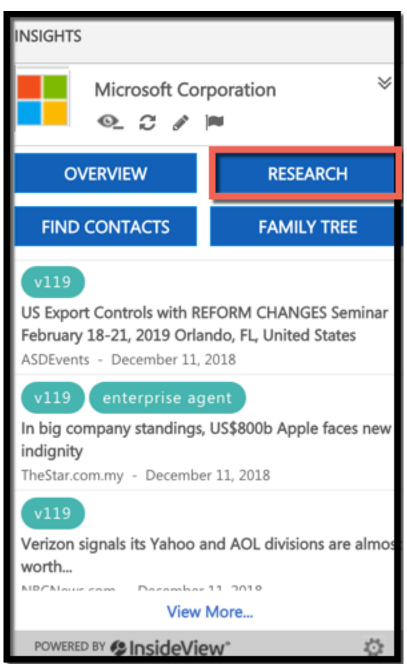
The **Research** tab provides comprehensive and up-to-the-minute information about companies so you can stay informed about their industry, examine similar accounts (their competitors), and research financial data before you approach them for business conversations. In the **Research** tab, all information about a company appears on a unique details page, where you can also do the following:

- Discover industry specific information for a company in your target accounts, along with an industry profile that includes SIC and NAICS details.
- Get real-time business information about similar accounts (competitors) who may become prospects and future customers.
- Learn more about the company's financial status.

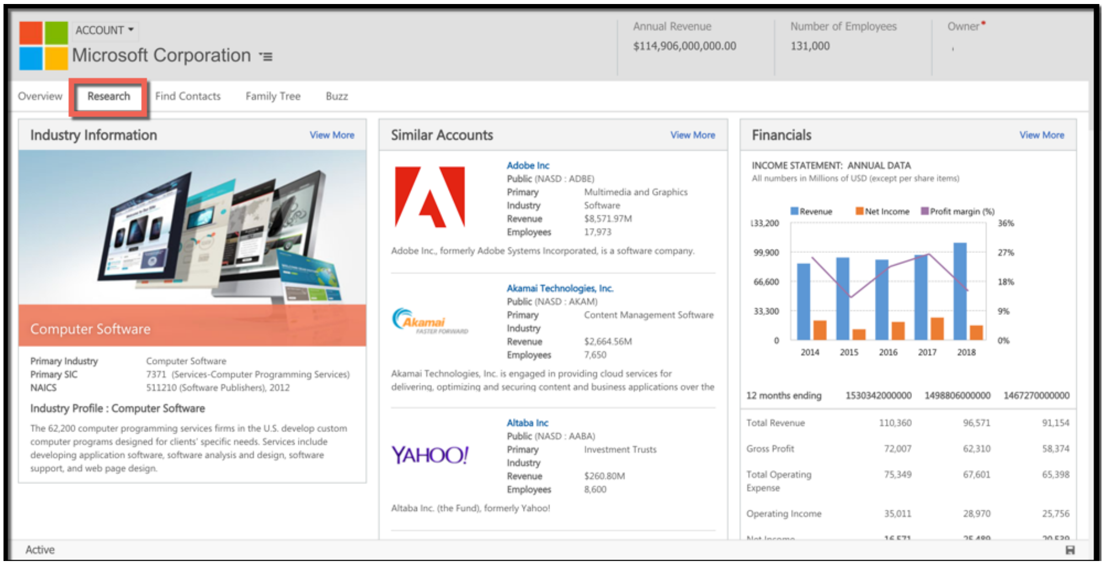
Getting to a company's research information

In InsideView Insights, you can get to research information for a company.

1. Go to the Company Details page and click **Research**.



2. The company's Research Page opens.



Industry Information

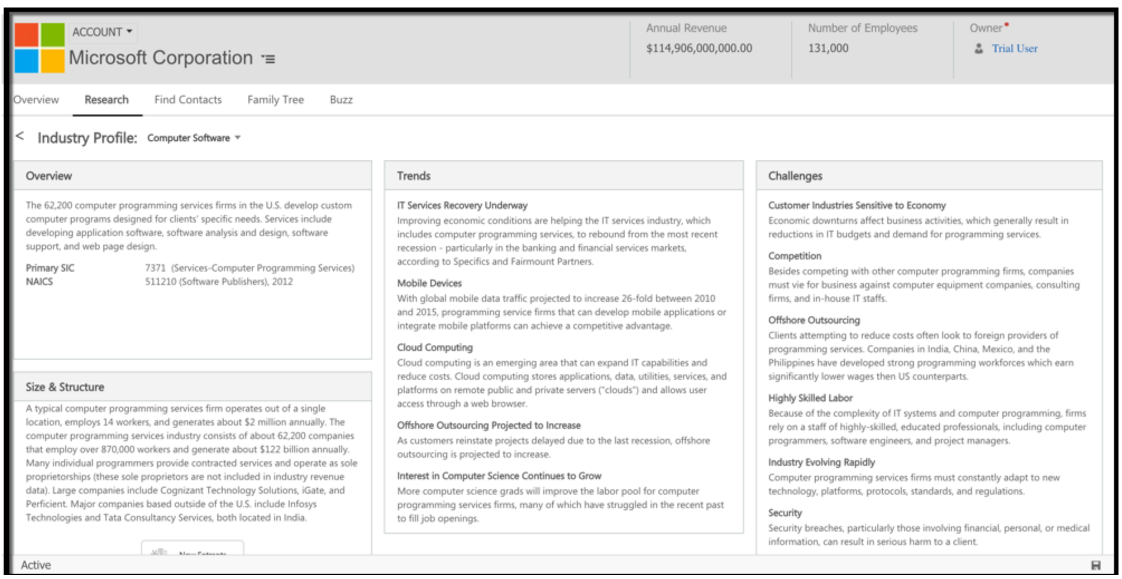
The **Industry Information** displays a detailed industry profile for that company, including its challenges, trends, size, and structure. When you click **Research** in Insights Summary view, then click again on the **Research** subtab to see the industry profile information within Dynamics 365. From this subtab, you'll be able to do any of the following:

- Get a quick overview of the company's industry type, including primary Industry, primary SIC, and NAICS.
- Draw meaningful conclusions from the industry profile of the company.
- Learn about any challenges the industry is facing.
- Learn more about industry trends, size, and structure.

Follow these steps to view the complete industry profile for one of your target companies:

1. Click the **View More** link on the Research subtab

2. The Industry Profile page opens.

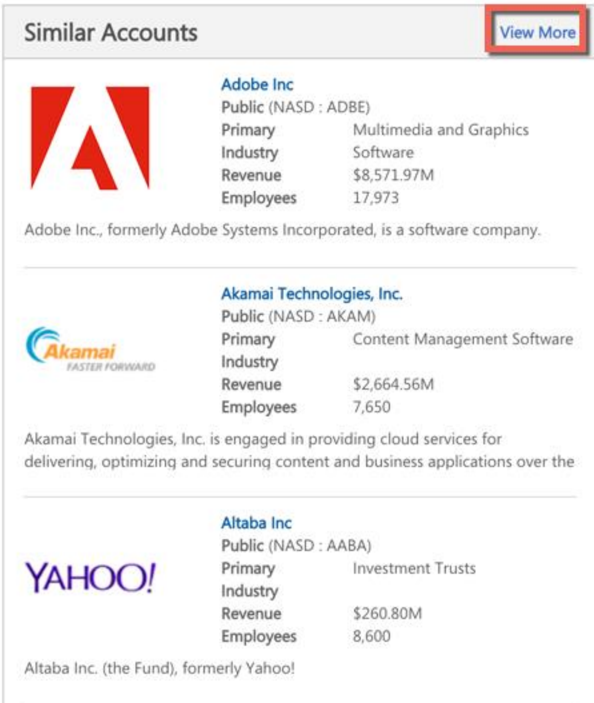


Similar Accounts subtab

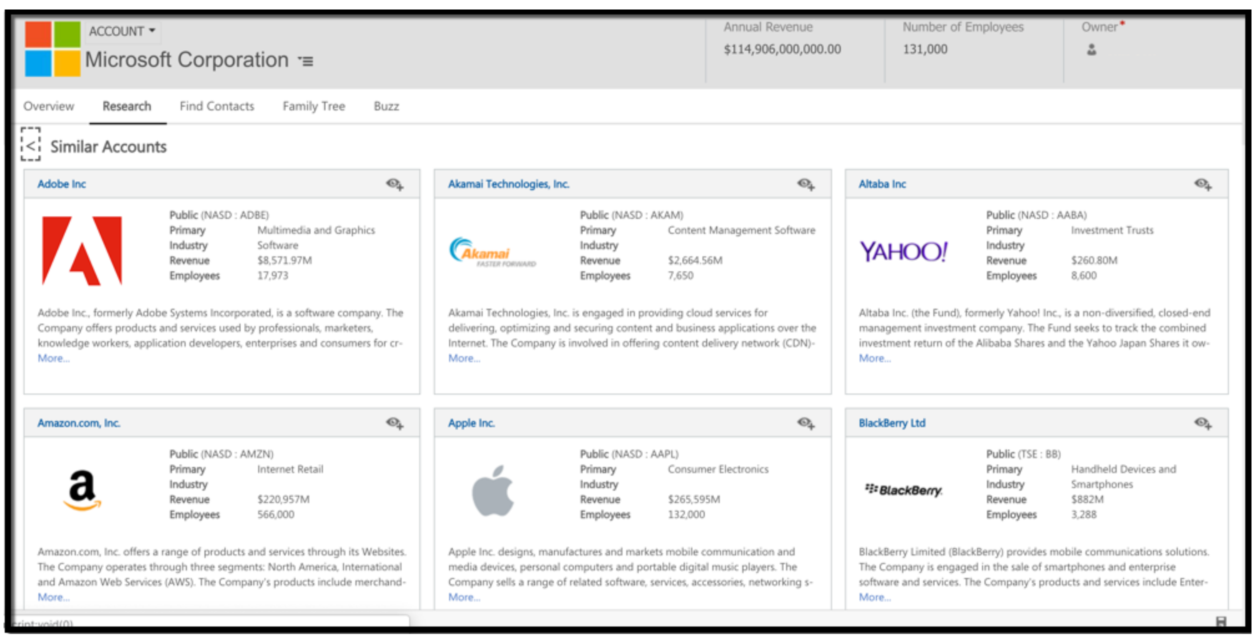
The **Similar Accounts** subtab displays a list of competitors within a similar industry. When you click **Similar Accounts**, competitor information opens in Dynamics 365 or CRM Online. From there, you can do the following:

- Review the list of competitors.
- See a brief summary of each competitor.
- Add companies to your Watchlist.

To view the Similar Account details, click the **View More** link.



The Similar Accounts detailed page opens:

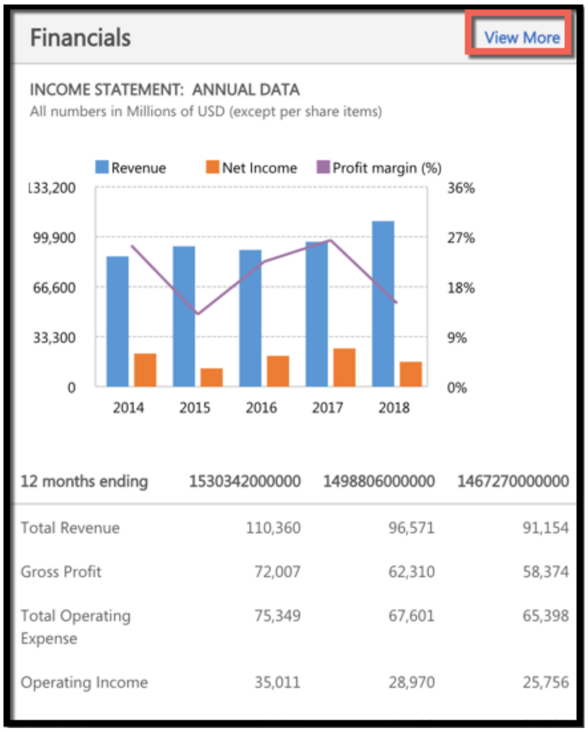


Financials subtab

The **Financials** subtab displays the annual and quarterly data from the company's income statement. This tab is available only for Public companies.

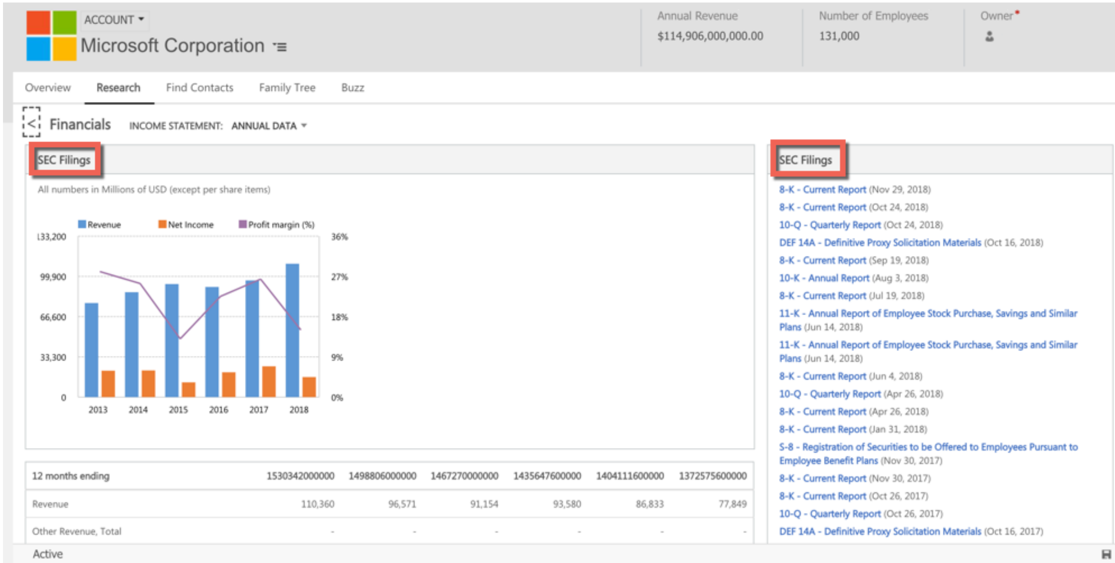
On the **Financials** subtab, you can view the company's annual and quarterly income statement. Here's how:

1. To view the company's financial data, quarterly report and SEC filings for the public companies in the US, click the **View More** link on the **Financials** subtab.



2. The Company Financial Data page opens.

   Note: You can choose to view either the Quarterly or Annual data by clicking on the list of options available.


ACCOUNT
Microsoft Corporation
Annual Revenue
$114,906,000,000.00
Number of Employees
131,000
Owner
Overview
Research
Find Contacts
Family Tree
Buzz
Financials
INCOME STATEMENT: ANNUAL DATA
SEC Filings
All numbers in Millions of USD (except per share items)
Revenue
Net Income
Profit margin (%)
2013
2014
2015
2016
2017
2018
12 months ending
Revenue
110,360
96,571
91,154
93,580
86,833
77,849
Other Revenue, Total
SEC Filings
8-K - Current Report (Nov 29, 2018)
8-K - Current Report (Oct 24, 2018)
10-Q - Quarterly Report (Oct 24, 2018)
DEF 14A - Definitive Proxy Solicitation Materials (Oct 16, 2018)
8-K - Current Report (Sep 19, 2018)
10-K - Annual Report (Aug 3, 2018)
8-K - Current Report (Jul 19, 2018)
11-K - Annual Report of Employee Stock Purchase, Savings and Similar Plans (Jun 14, 2018)
11-K - Annual Report of Employee Stock Purchase, Savings and Similar Plans (Jun 14, 2018)
8-K - Current Report (Jun 4, 2018)
10-Q - Quarterly Report (Apr 26, 2018)
8-K - Current Report (Apr 26, 2018)
8-K - Current Report (Jan 31, 2018)
S-8 - Registration of Securities to be Offered to Employees Pursuant to Employee Benefit Plans (Nov 30, 2017)
8-K - Current Report (Nov 30, 2017)
8-K - Current Report (Oct 26, 2017)
10-Q - Quarterly Report (Oct 26, 2017)
DEF 14A - Definitive Proxy Solicitation Materials (Oct 16, 2017)
Active

Chapter 6: Find (Other) contacts

This chapter helps you use InsideView Insights to find the decision makers at a company.

Understanding the Find contacts tab

The **Find Contact** tab helps you sell more effectively by directing you to the right contact, identify your mutual connections, and learn more about them so you can quickly and easily establish rapport and build credibility. These are some things you can do from this tab:

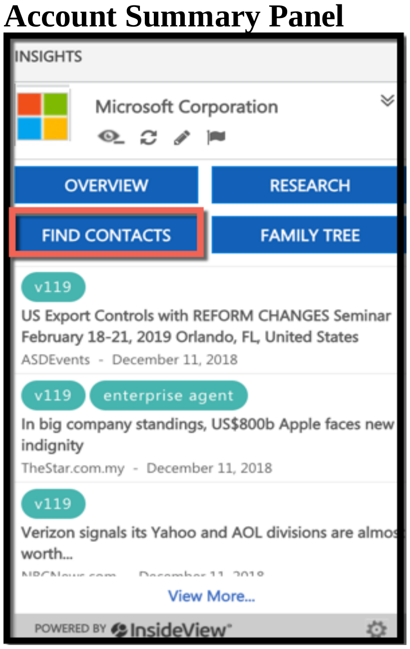
- Search for key executives and decision makers working at a company.
- View your connections to key decision makers at the company.
- Add a contact to the list of executives at the company.
- Add an executive as either a lead or contact to CRM
- Add an executive to your Watchlist.
- View the connection graph and ask for referral

Getting to the Find Contacts page

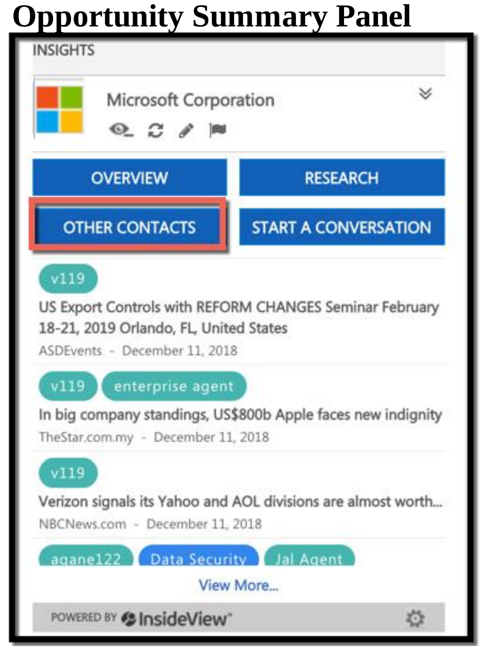
You can get to the Find Contacts page from a company's view. Here's how:

1. Go to the Account or Opportunity Summary panel.

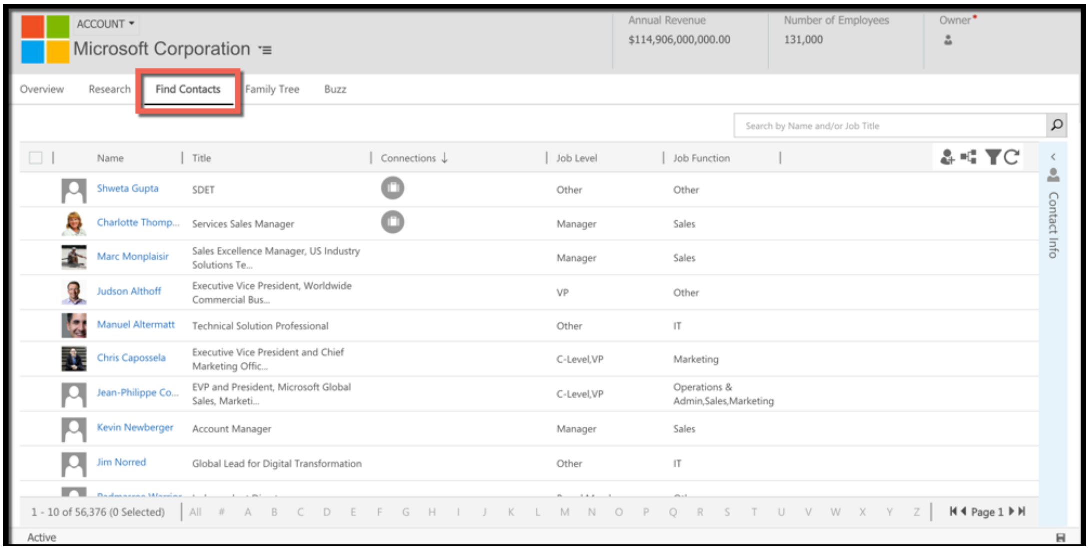
Account Summary Panel



Opportunity Summary Panel



2. Click **Find Contacts** to open the Find Contacts page.



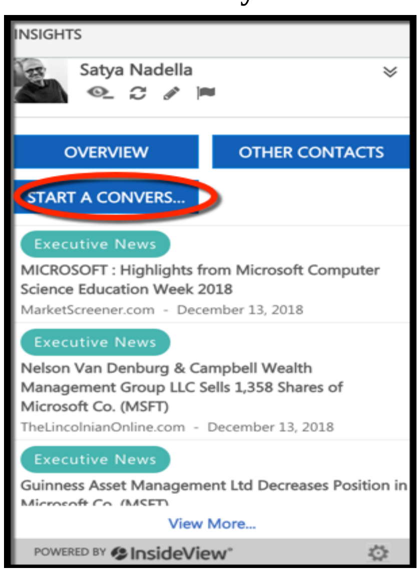
3. On the Find Contacts page, you can search for an executive and add them to a Watchlist. You can also add an executive as a contact and lead in the Dynamics CRM.

Getting to Other Contacts

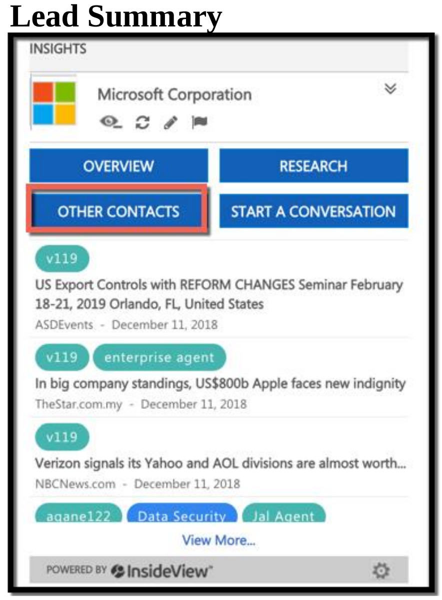
Insights lets you view other contacts from your Contact and Lead page so that you can start having right business conversations with right contacts. Here's how:

1. Go to the Contact and Lead Summary panel by following instructions in the [Getting to the Find Contacts](#) section and click **Other Contacts**.

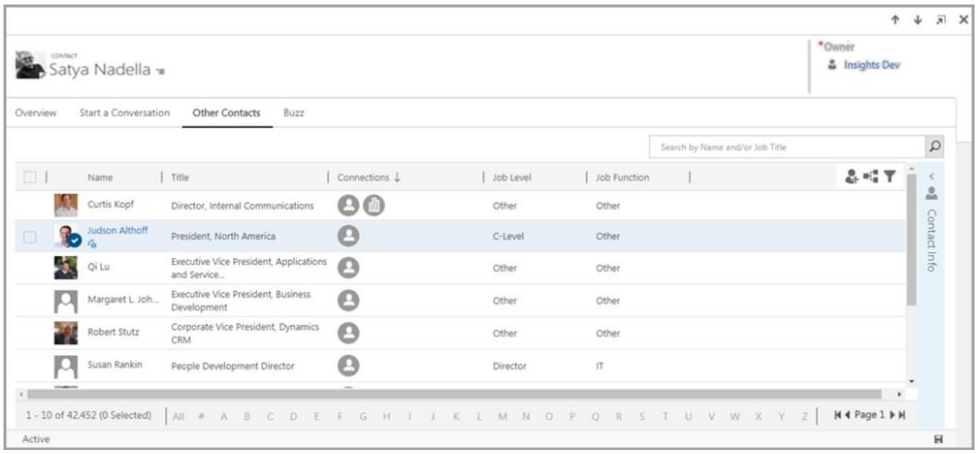
Contact Summary



Lead Summary



2. In the Find Contacts tab, you can perform the following actions:
    - Search for and view contacts
    - Add as a contact and lead in the CRM
    - Search for and filter contacts
    - Add multiple contacts
    - View the connection graph and ask for referral
    - View a contact's family tree



3. Follow instructions in the sections below to use the **Other Contacts** tab.

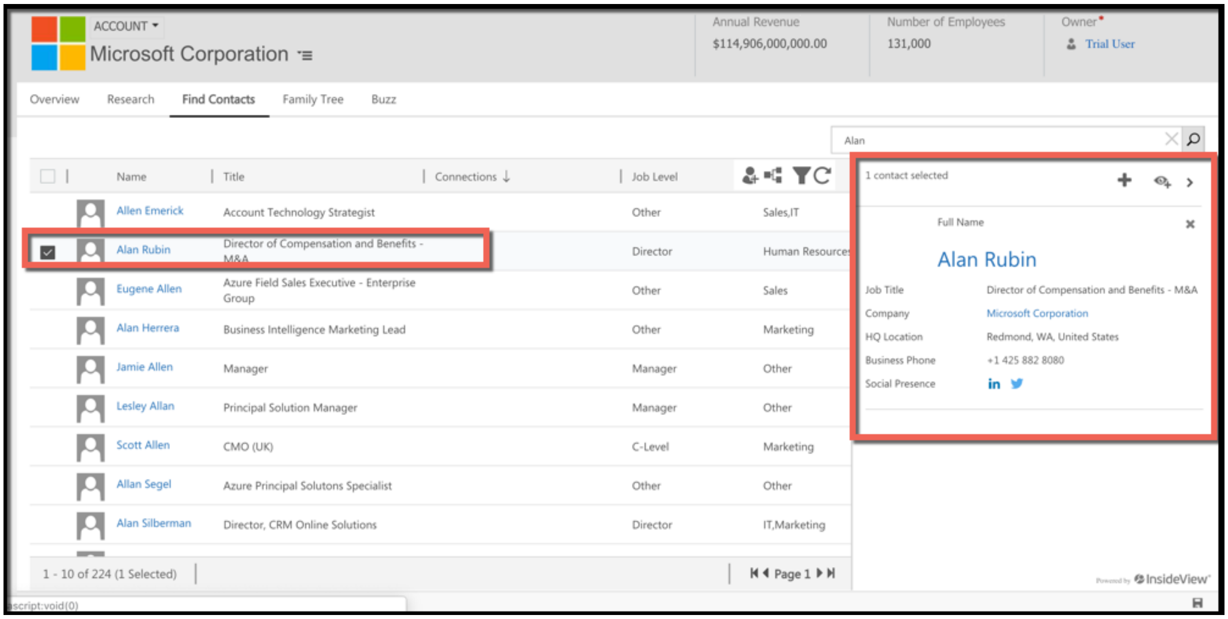
    - Search for and view contacts
    - Add as a contact and lead in the CRM
    - Search for and filter contacts
    - Add multiple contacts
    - View the connection graph and ask for referral
    - View a contact's family tree

Search for and view contacts

On the Find Contacts page you can search for top executives at a company. Here's how:

1. Go to the Find Contacts page.
2. In the search text box, enter the name or the job title of a contact and click the **Search** button to open the Search Results page.

3. Select a contact to view that contact's details.



4. The Preview pane expands to show details for that contact. You can collapse the Preview pane by clicking the **Contact/Executive's Name** link.

Contact Preview pane functions

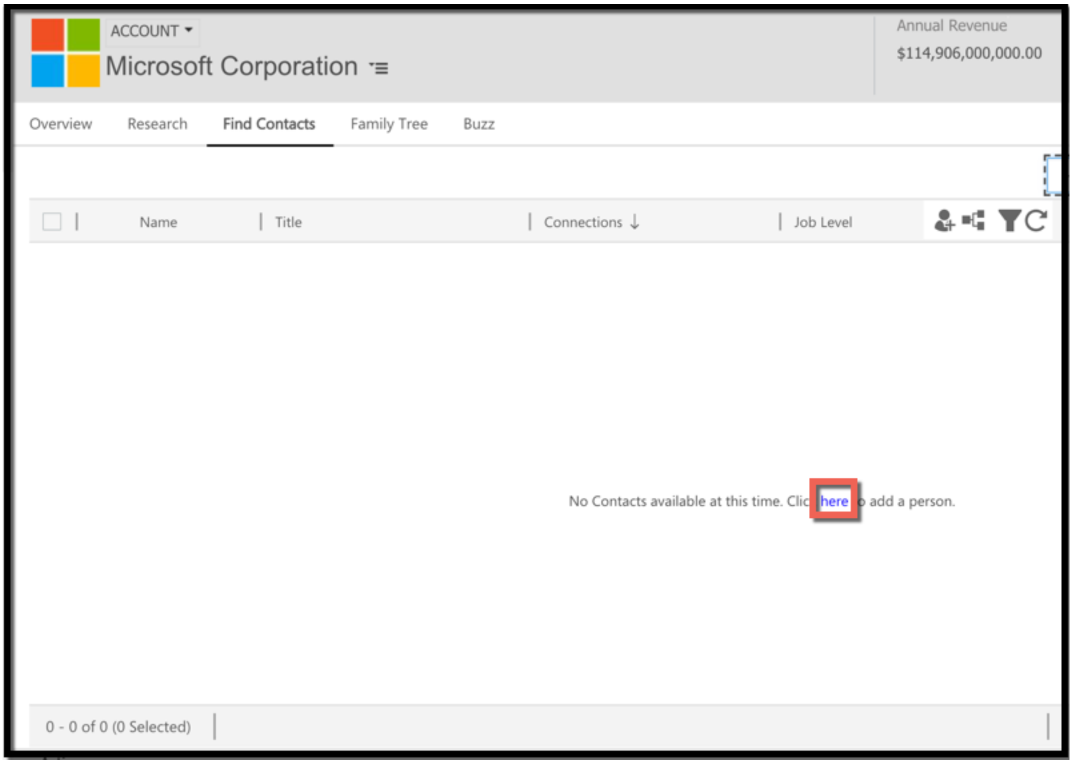
The contact Preview pane shows you all of the following firmographic data about a contact and lets you do any of the following:

- View all contact information, including email address, phone number, as well as employment and education details.
- Add a contact/person to the Insights database.
- Add a contact to Dynamics 365 or CRM Online.
- View a contact as a lead in Dynamics 365 or CRM Online.
- Add the person to your Watchlist.

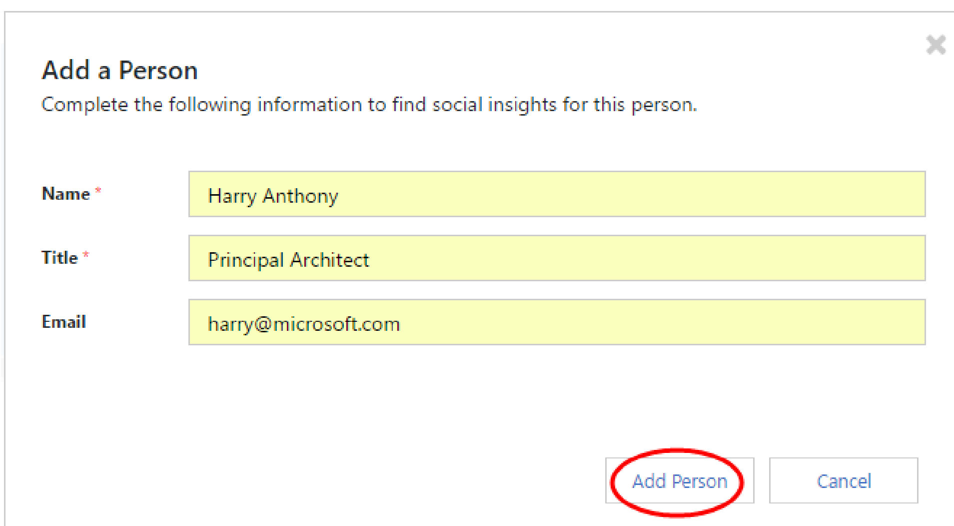
Add a Contact in Insights Database

If you do not find the name of a contact/person in your search results, you can add the basic details of the contact in the database. These additions will be reviewed and researched by our team and updated to show up in search results. To add a person, follow the instructions in the Add a Person section.
The Preview pane lets you add a person, who does not exist in the Insights database. Here's how:

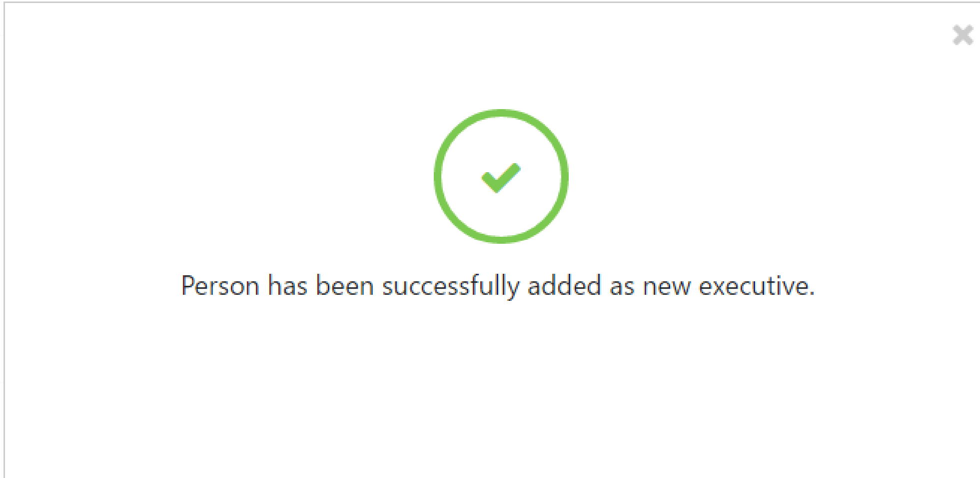
1. Go to the Find Contacts page and enter a contact's name to search.



2. On the Add a Person page, enter the full name, title, and email address of the contact you want to add.



3. Click **Add Person**. You will see a confirmation message.

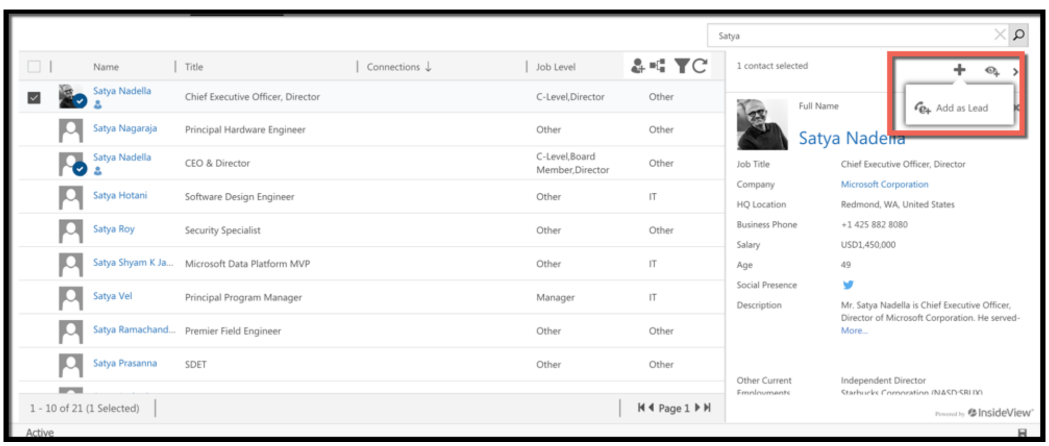


Add as a contact and lead in the CRM

The Preview pane allows you to add a contact and lead to your Dynamics 365 environment. Here's how:

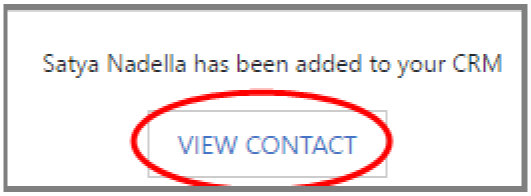
1. Go to the Find Contacts page, and then select a contact. For example, select Satya Nadella.

2. To add the person as a contact in Dynamics 365 or CRM Online, click the **+ Add** button.

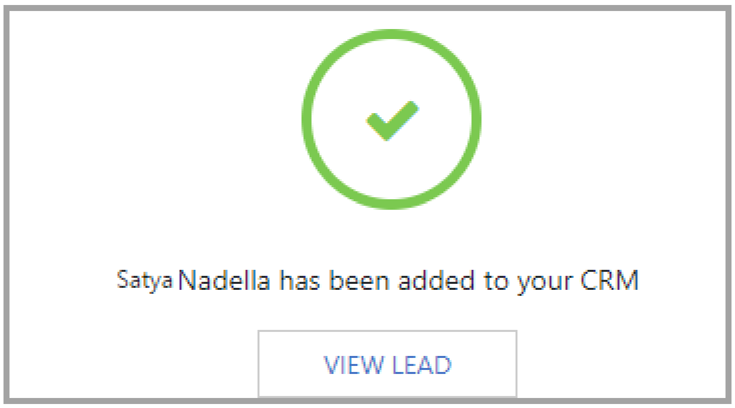


3. Click the **Add as Contact to CRM** button  to add a contact in the CRM.

4. The **Contact** button appears below the person's name and you will see a **View Contact** button.



5. To view the contact details in your Dynamics 365 or CRM environment, click **View Contact**.
6. Click the **Add as Lead** to add a contact as lead. Once the person is added, you will see a **View Lead** button.

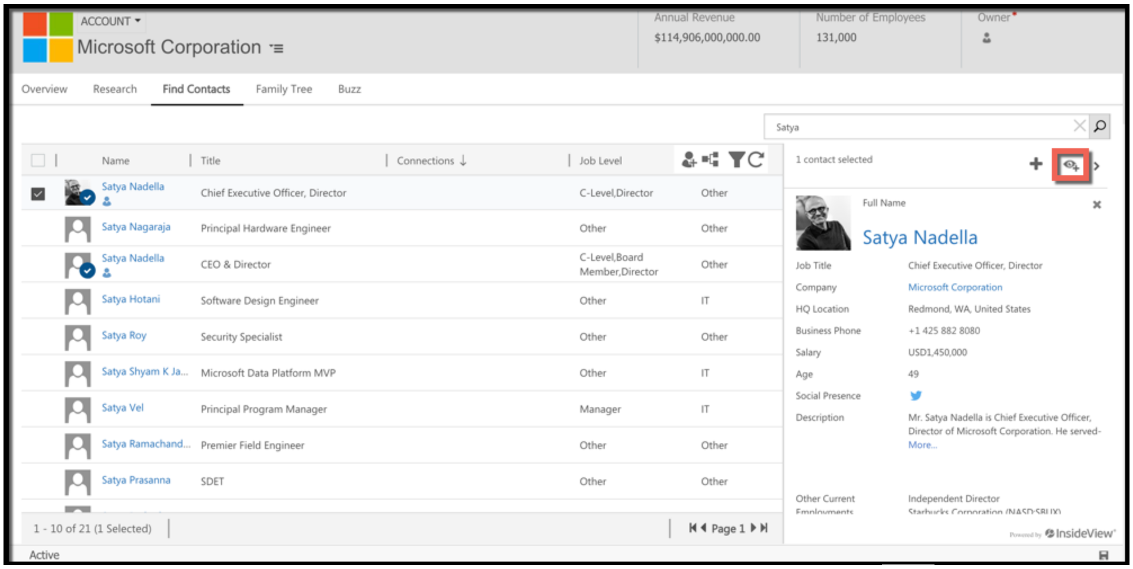


7. To view the lead details in your Dynamics 365 or CRM environment, click **View Lead**.

Add to a contact to a Watchlist

From the **Find Contacts** page you can add a contact to a Watchlist. Here's how:

1. Go to the Find Contacts page, and then select the contact.



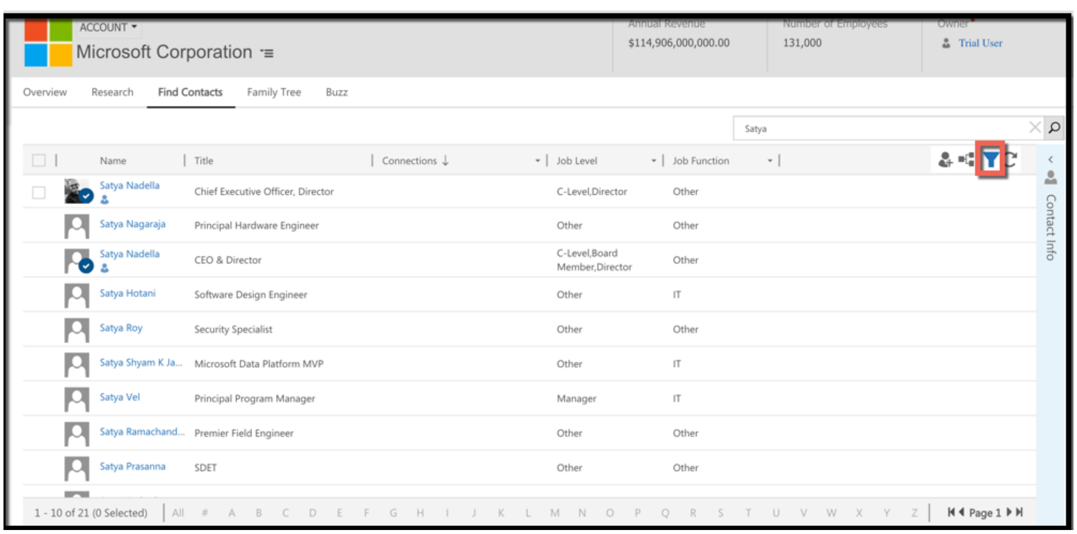
2. To add the contact to a Watchlist, click the **Add to Watchlist** button .

3. The eye button appears below the contact's name and you will see an add confirmation message.

Search for and filter contacts

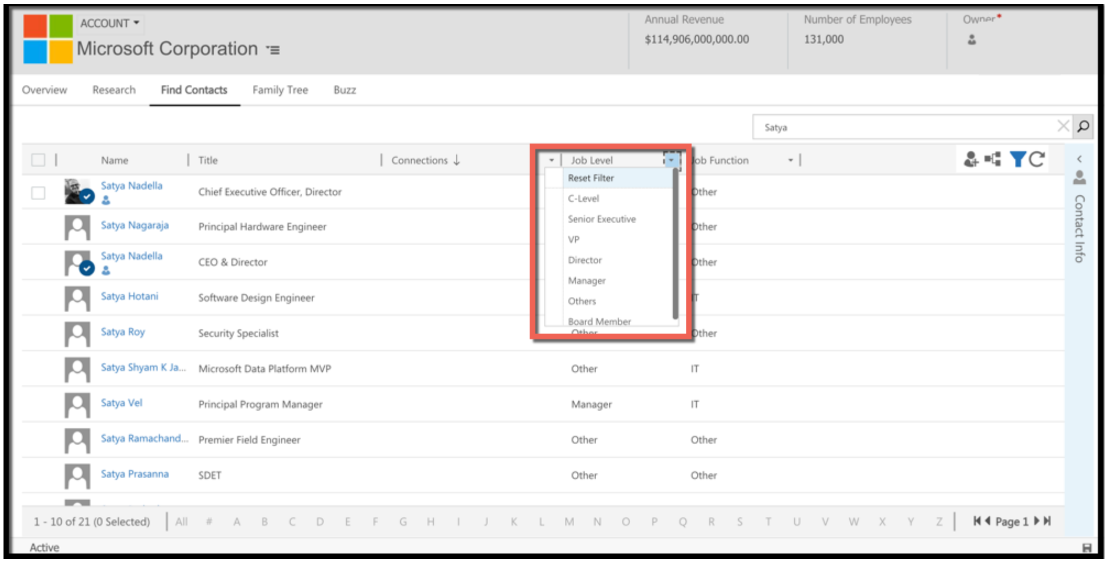
From the Find Contacts page, you can filter contacts by job functions and job levels. Here's how:

1. Go to the Find Contact page.

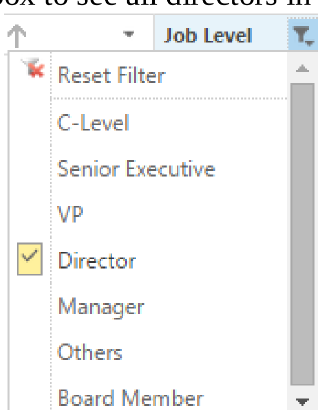


2. To activate the filtering options, click the **Filter** button  .

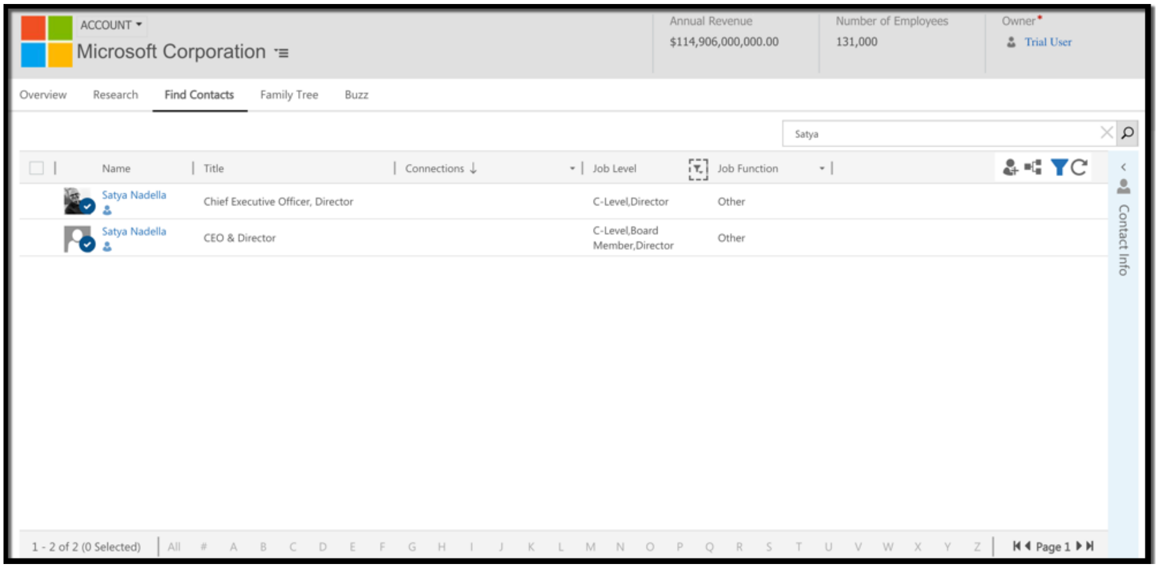
3. To filter the contacts based on the job level, click the **Job Level** column.



4. Choose a filter by selecting the check box. For example, select the **Director** check box to see all directors in a company.

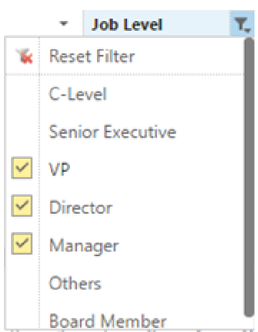


5. The results display all executives with job levels that you just selected.



6. Clear all check boxes to see all contacts.

7. Select the check box by multiple job levels to see executives with any of those job functions.



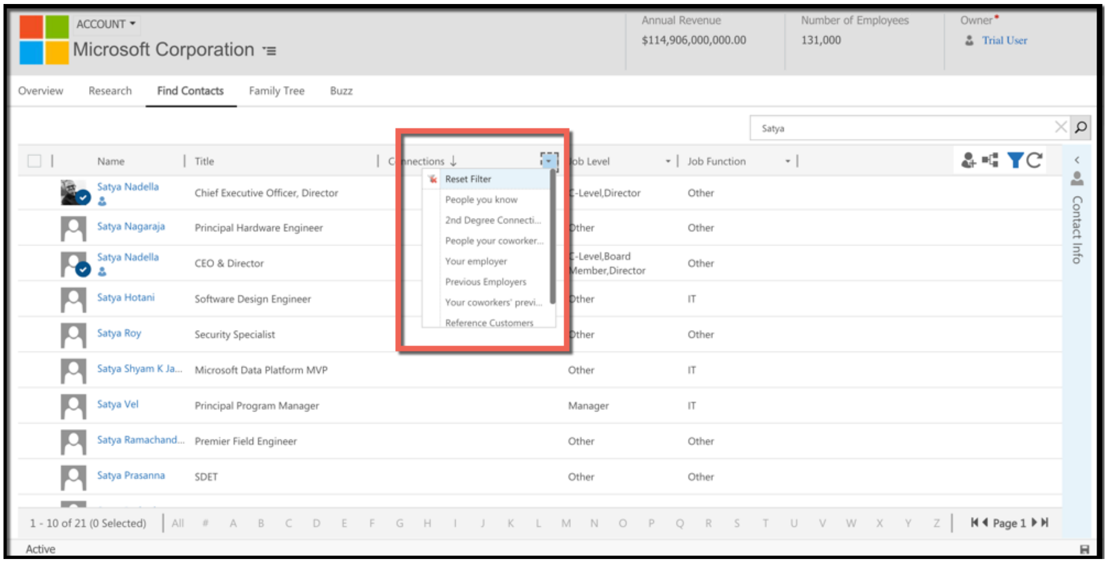
8. With these filters selected you will see the executives with job titles as VP, Director, and Manager in contact search results.

9. Clear all check boxes to see all contacts.

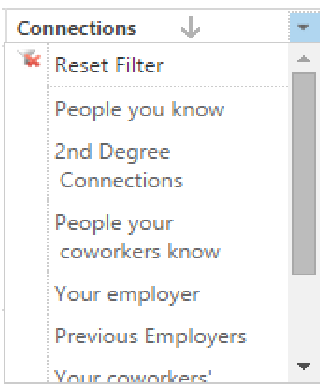
View Connections

The Find Contacts page allows you to view how you are connected to a particular contact in a company. Here's how:

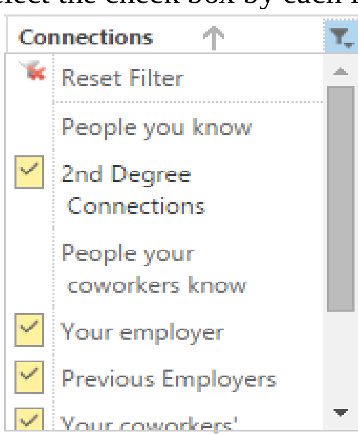
1. Go to the Find Contacts page, and then click the **Filter** button.



2. To filter connections from different sources, click the **Connections** column.



3. Select the check box by each filter you want.

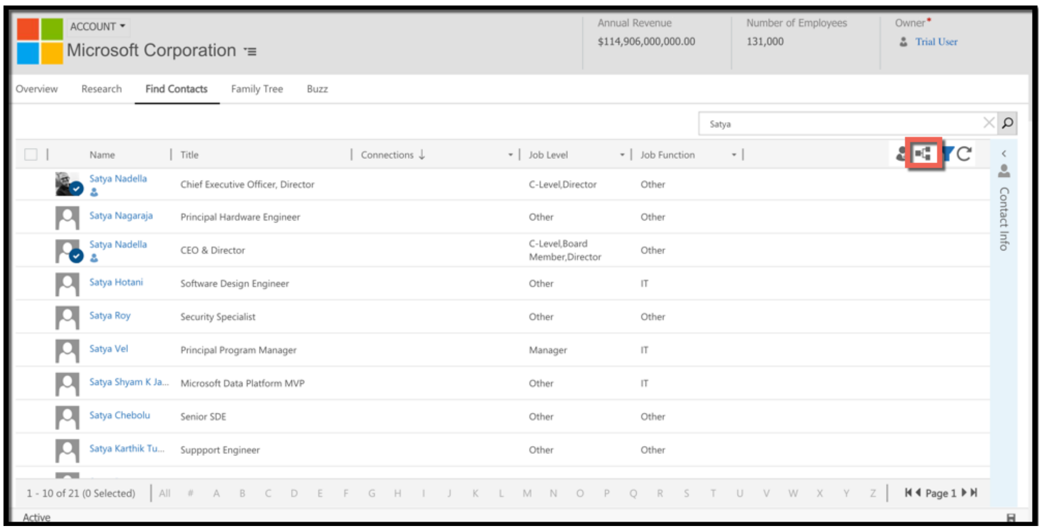


4. Use the up and down arrows to sort the connections.

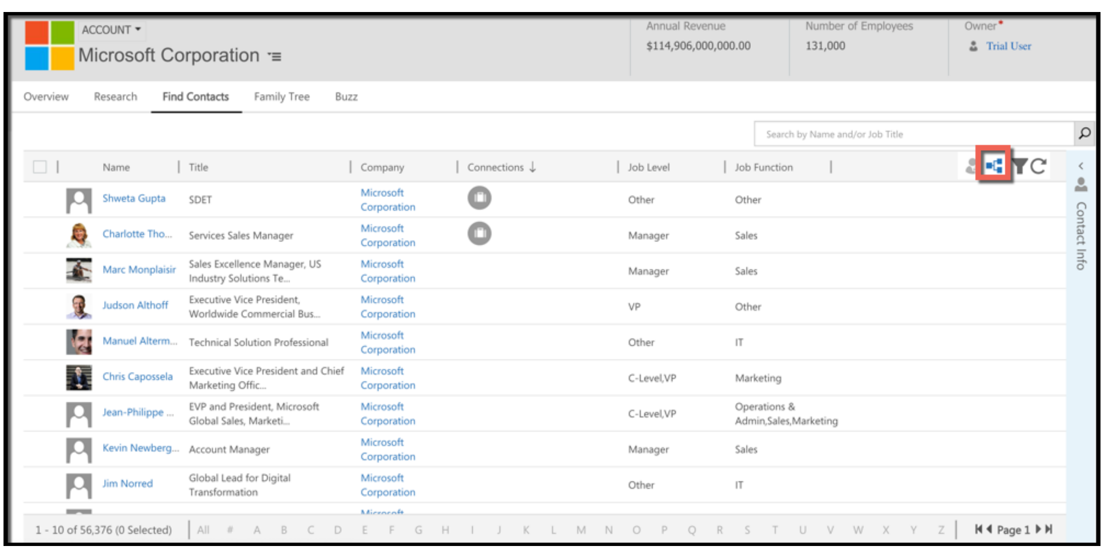
View contacts across company’s family tree

Another interesting thing you can discover from the Find Contacts page, it shows all contacts across the companies, which includes the entire family tree for that company. Here’s how:

1. Go to the Find Contacts page, and then click the **Family Tree** button to see contacts across company’s family tree.



2. The Family Tree page opens and icon changes to blue color .

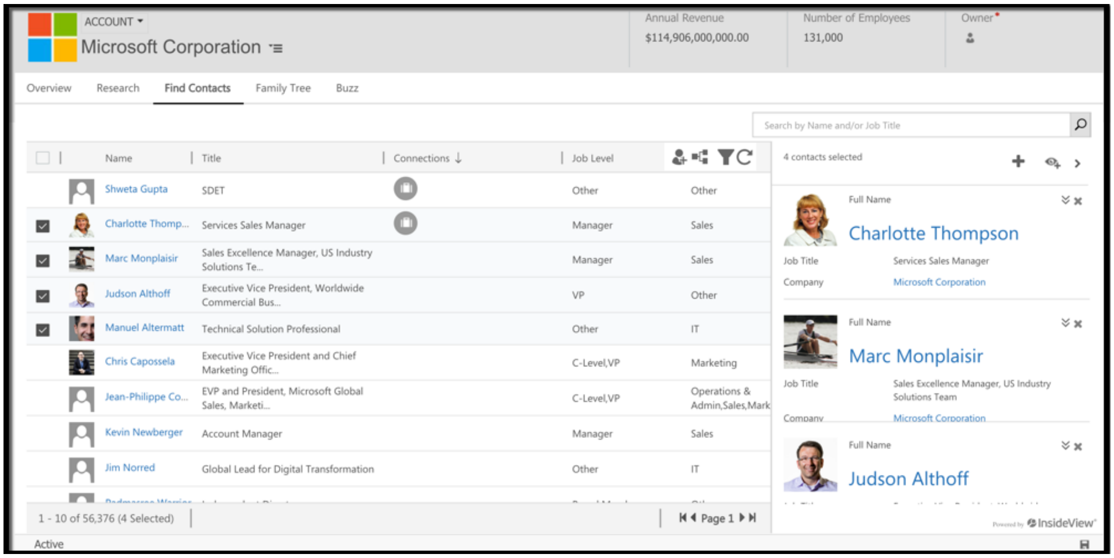


3. The contacts across the family tree are sorted in ascending order based on relevance.

Add multiple contacts

You can add multiple contacts to Dynamics 365 or CRM Online, add them as leads, and add them to Watchlists from the Find Contacts page. Here's how:

1. Go to the Find Contacts page, and then select the check box by multiple contacts.

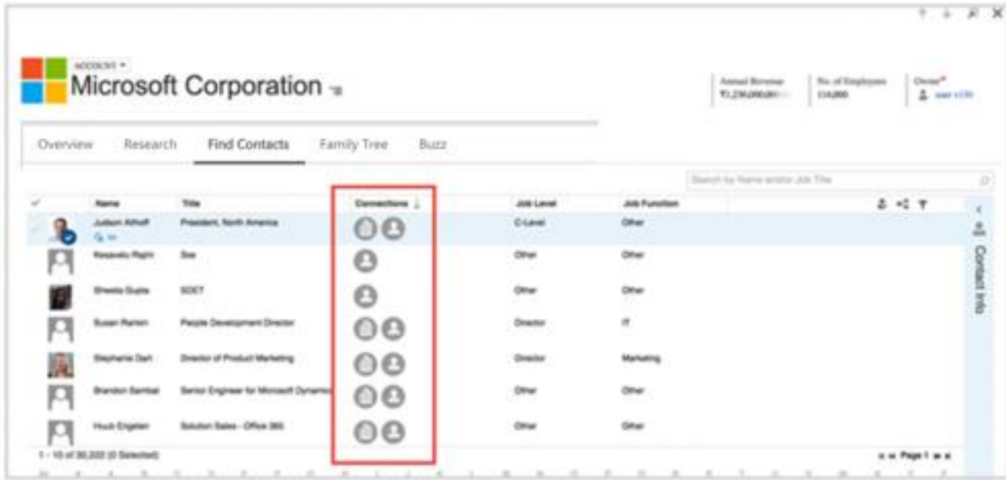


2. Complete any of these activities for the selected contacts:
   - To view firmographic data, click the **Show Firmographics** button .
   - To add into Dynamics 365 or CRM Online, click the **Add as contact to CRM** button.
   - To add as leads, click the **Add as Lead to CRM** button .
   - To add to your Watchlists, click the **Add to Watchlist** button .

View the connection graph and ask for referral

Insights provides an interactive connection graph that lets you view how you are connected to a contact. For example, if you know a contact who was your previous co-worker or if a contact that you know works at a reference customer or if they are your personal contacts such as LinkedIn, Gmail and Outlook. You can click on the connection type to view the additional details. Here's how:

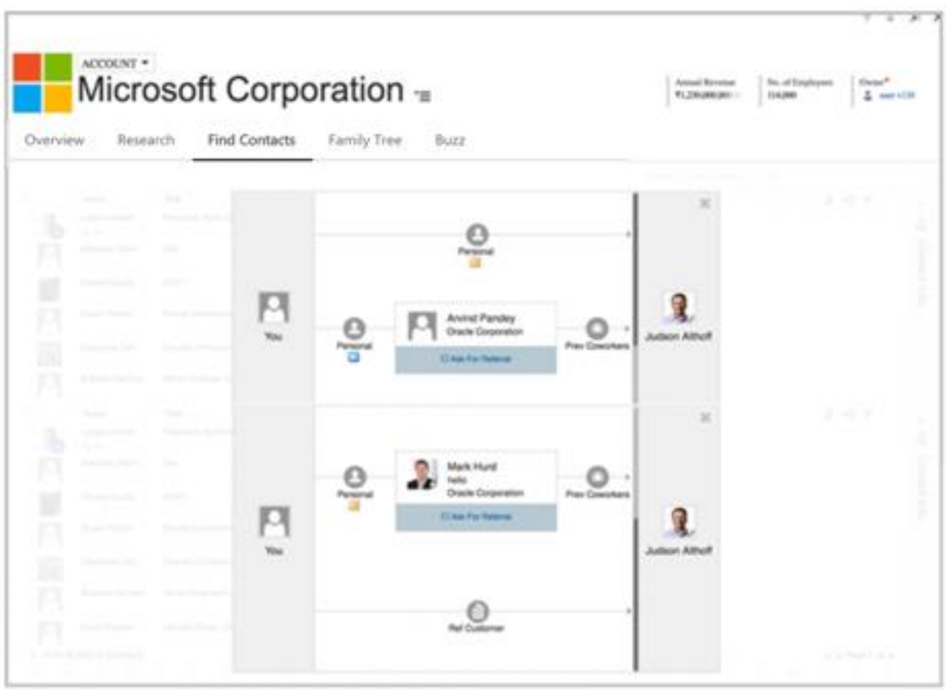
1. Go to the **Find Contacts** page, and then click the **Connections** area.



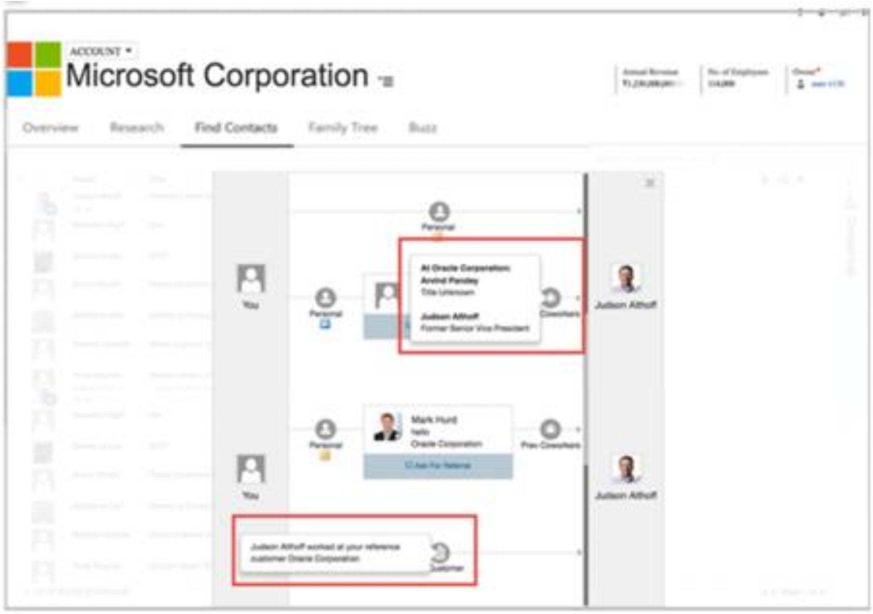
2. To view the connection graph in Dynamics 365 and On-premises, click the **View Connection** buttons  .

3. The **Connection Graph** appears with list of connections to whom an executive is connected.

   Note: The Previous co-worker or Reference Customer is visible only when you have a connection in your previous company or a reference customer.

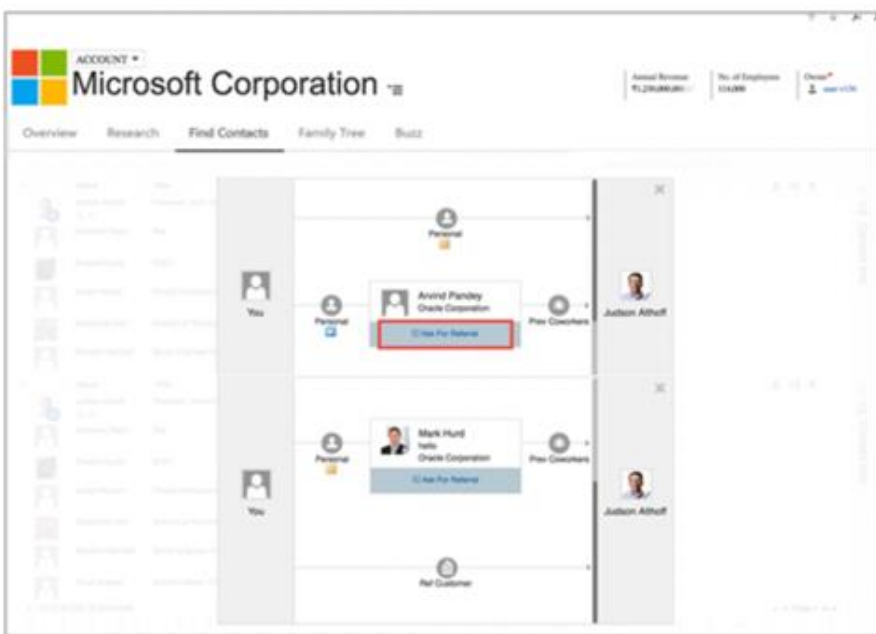


4. In the Connections Graph, hover over the **Previous Coworkers** or **Ref Customer** buttons to view additional contact details.



5. To send an email to your connection, click the **Ask for Referral** link.

   When you click the **Ask for Referral** link the default email client that is configured in your system opens. If no email client is configured, then you get to select one from the list email clients that pops up. The **Ask for Referral** link launches a default email template. You can modify the template on your E-mail client if required.



6. Click the **Close X** button to return to the **Find Contacts** page.

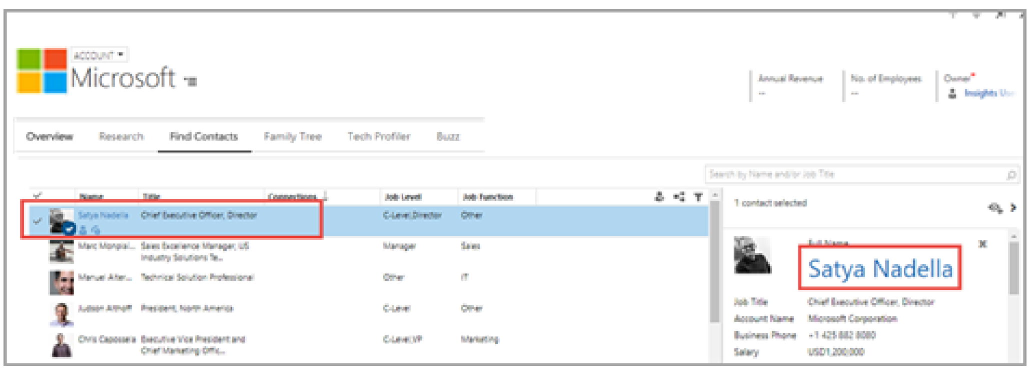
Viewing Contact Details

You can view an executive as a contact or lead. You can also view multiple contacts when you select them in the List Build results page.
If an executive is added either as a contact or lead, when you click the **Name** hyperlink it will redirect you to respective entity page.
Here is how you can view contact details:

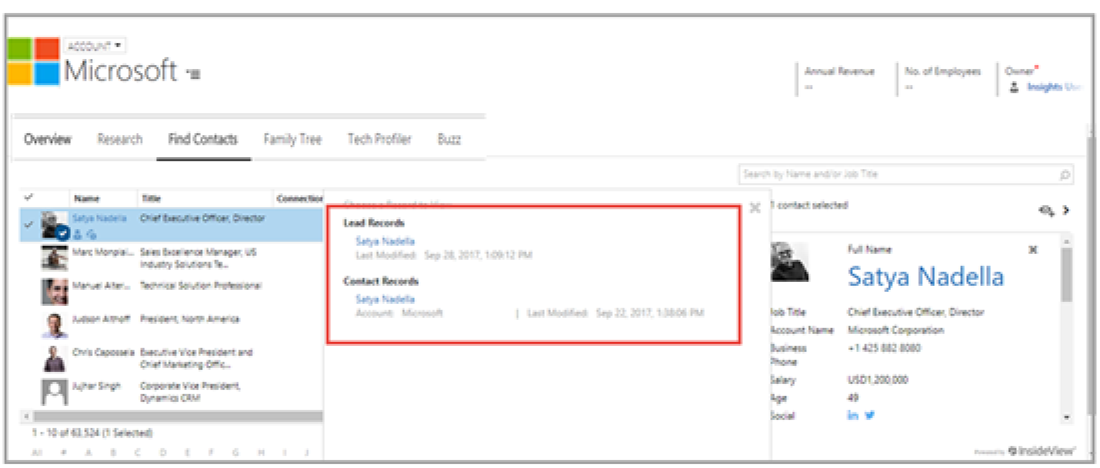
1. Follow the instructions in the Getting to the List Build or Getting to Find Contacts section to open any of the company or contact grid.

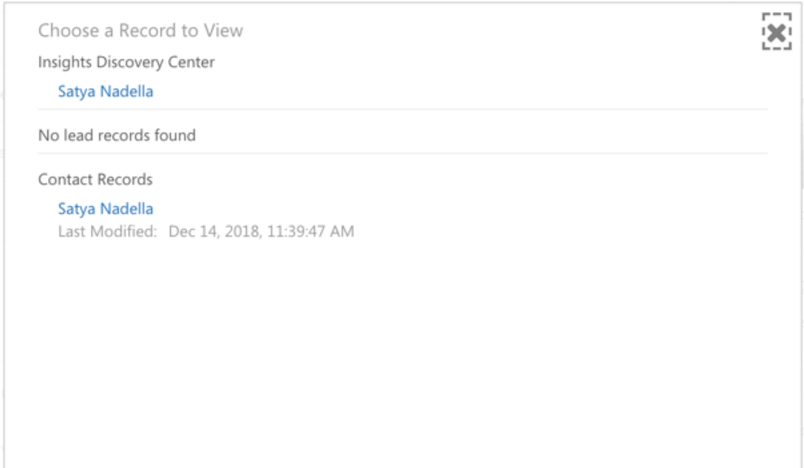
   Note: In this section, the **Find Contacts** page is used as an example to show how to view an executive as a contact or lead and the **List Build** page to view a contact in the Dynamics 365.

2. Go to the **Find Contacts** page and select an executive who is added as a contact and lead in the CRM.

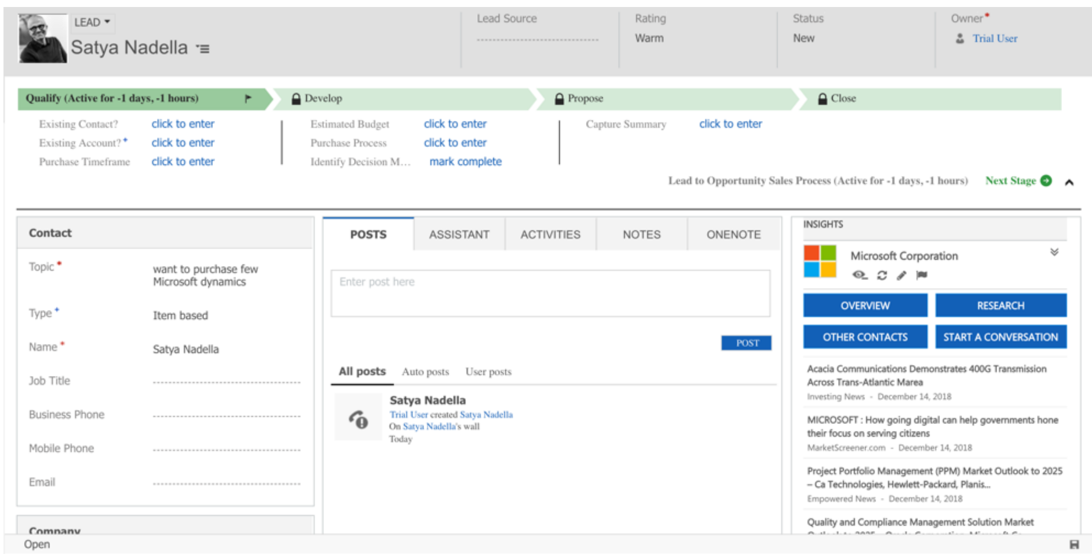


3. Click the **Name** hyperlink to view the Contact and Lead summary details.

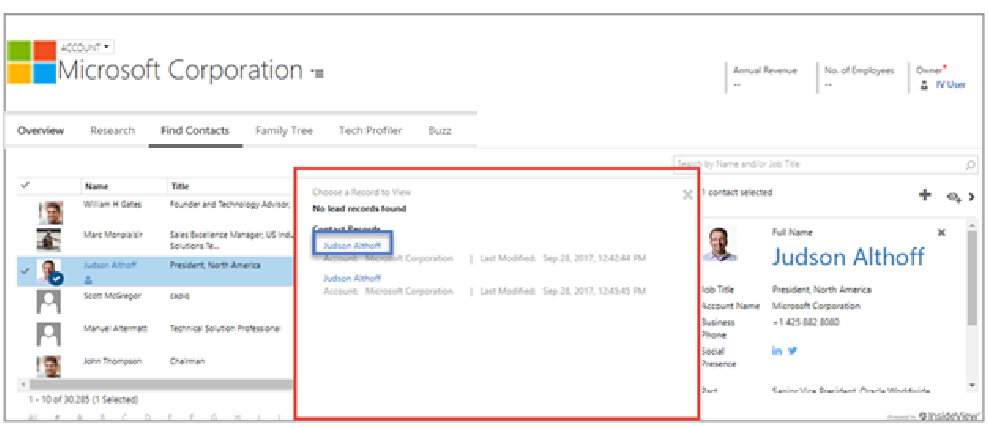




4. Click the respective hyperlink in the popup to view the Contact or Lead details in the CRM.

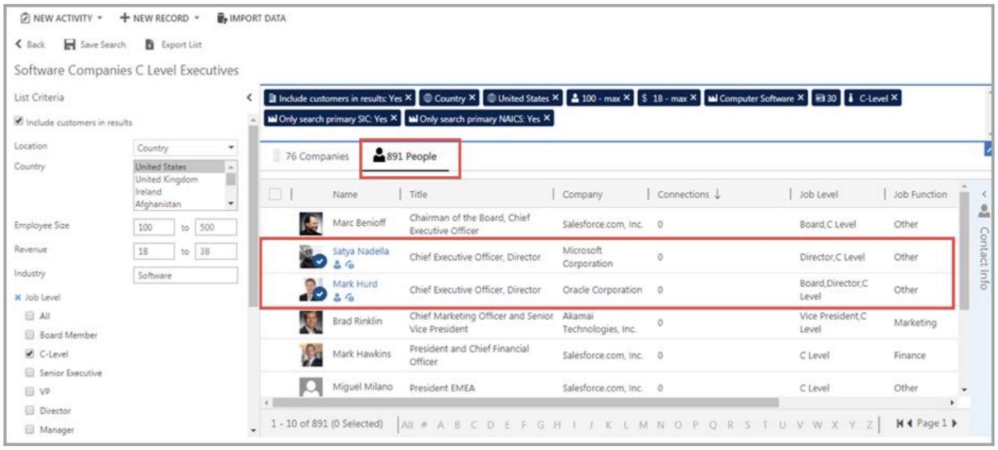


5. To view one of the multiple instances of a same contact, click the **Contact** hyperlink.

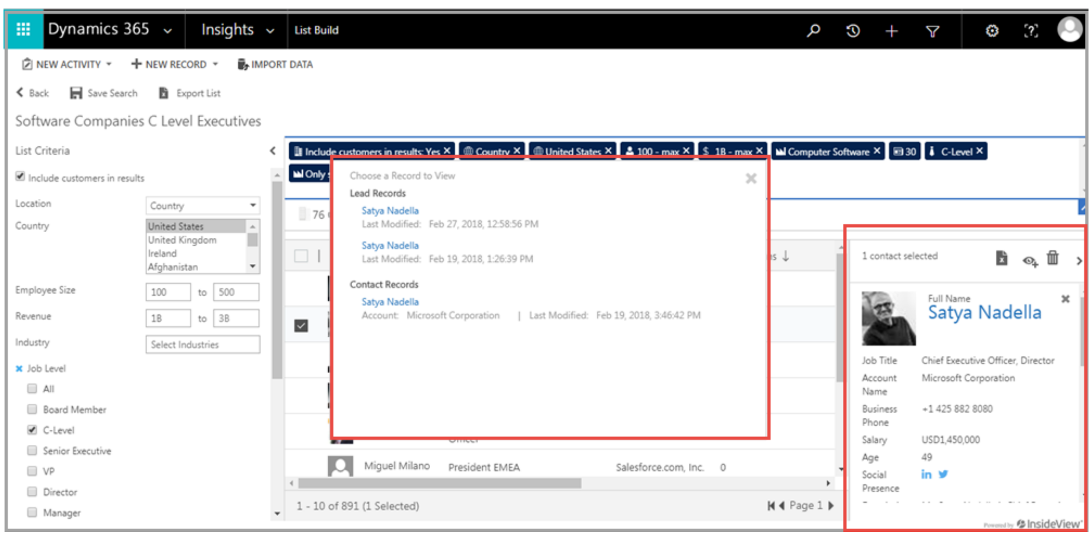


6. Choose any record that you want to view and click on the **Name** blue hyperlink.

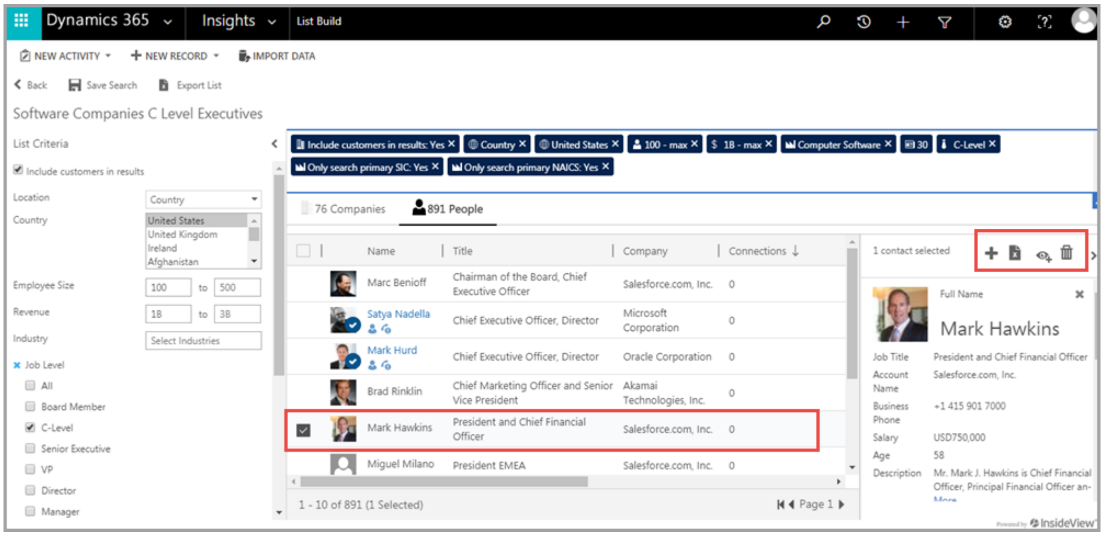
7. To view a contact details in the CRM, go to the **List Build Grid** page, select the **People** tab.



8. If a contact is added to your CRM, then you can select that contact and view that particular contact's information either in CRM view or in the List Build view.



9. If a contact is not added to the CRM, then when you click the Name hyperlink you will be able view contact in the List Build page itself.


Dynamics 365
Insights
List Build
NEW ACTIVITY
NEW RECORD
IMPORT DATA
Back
Save Search
Export List
Software Companies C Level Executives
List Criteria
Include customers in results
Location
Country
Employee Size
Revenue
Industry
Job Level
76 Companies
891 People
Name
Title
Company
Connections
Marc Benioff
Satya Nadella
Mark Hurd
Brad Rinklin
Mark Hawkins
Miguel Milano
1 contact selected
Full Name
Mark Hawkins

Chapter 7: Relationship Assistant

This chapter helps you understand how to use the Relationship Assistant feature to receive acquisition related alerts.

Insights integrates with **Relationship Assistant** functionality of Microsoft Dynamics CRM to get updates about mergers & acquisitions (M&A) via Relationship Assistant action cards. You can view news about M & A activity related to accounts that you are prospecting.

Insights uses Relationship Assistant's artificial intelligence (AI) to send tailored, just-in-time and actionable alerts to CRM users so that they can prioritize and engage with most relevant information. These cards are displayed when you go to the Relationship Assistant tab in Dynamics 365 in unified client interface (UCI) view and visible as an alert in the Account detail page.

Understanding the Relationship Assistant Card

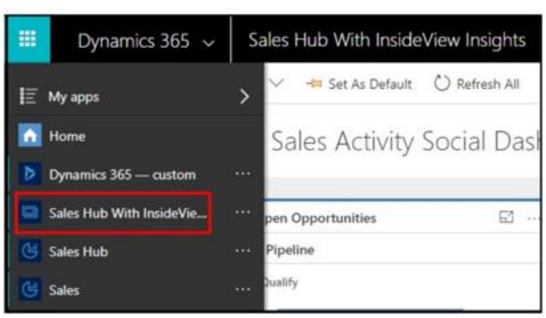
The Insights **Relationship Assistan**t card shows acquisition alerts that provides tailored information with helpful links and action controls.

Note: The Relationship Assistant feature is available only in Microsoft Dynamics CRM's UCI 9.0 version and above. To use the Relationship Assistant functionality, you must create an application user and verify the Acquisition Alert setting in the Organization Settings. For more information, read the Creating an Application User and Verify the Insights Acquisition Alert Setting sections in the *Insights Installation Guide*.

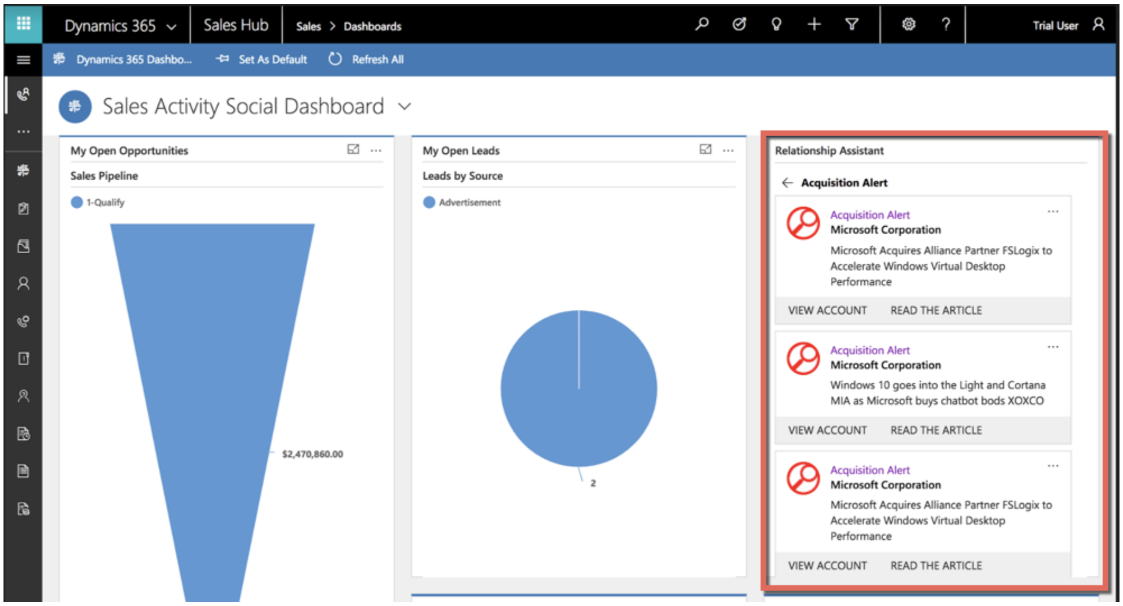
Getting to Insights Relationship Assistant Card

In InsideView Insights, you can view the acquisition related news in Relation Assistant tab in unified client interface (UCI) view. Here's how:

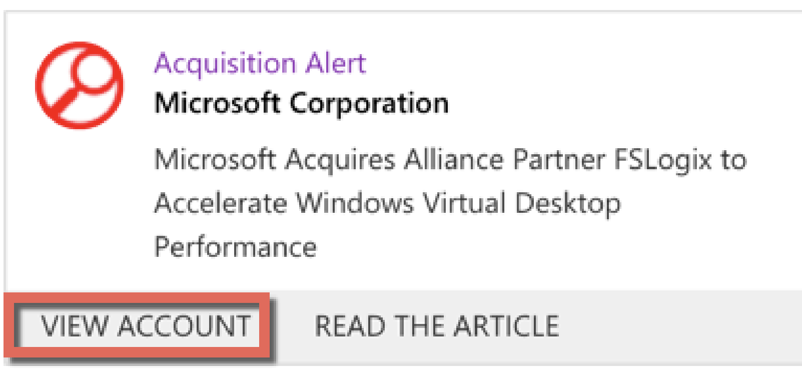
1. Go to Dynamics 365 and select the default **Sales Hub with InsideView Insights** or any preconfigured Sales Hub app with InsideView Insights tile and click the **Relationship Assistant** tab.



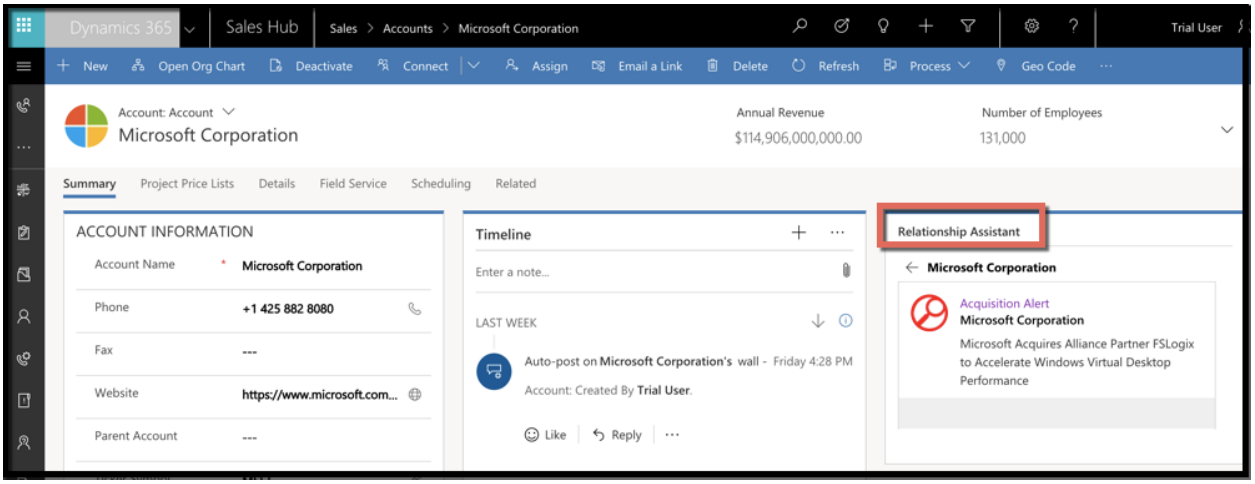
2. In the Sales Activity Social Dashboard, the Relationship Assistant alerts are displayed as illustrated.



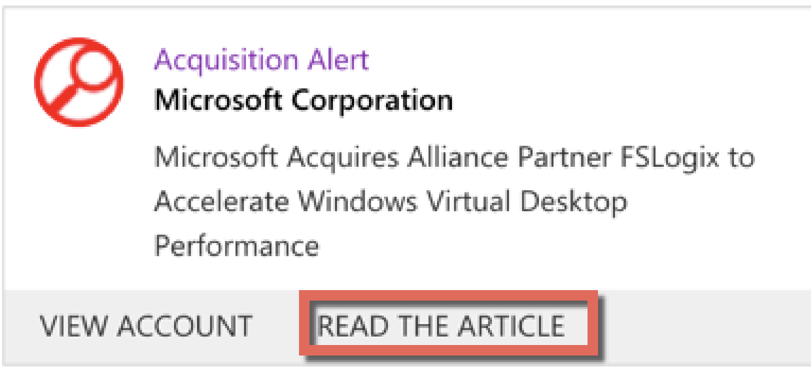
3. Choose the **View Account** to view the account detail.



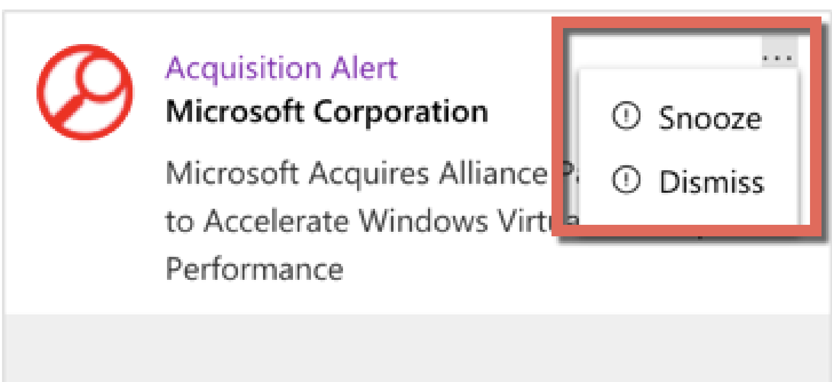
4. In the Account Detail page, you can view acquisition alert in the Relationship Assistant section.



5. Choose the **Read Article** link to open the acquisition related news article.



6. Click the **ellipsis …** button and select the options to **Snooze** or **Dismiss**.



Chapter 8: Family Tree

This chapter helps you use InsideView Insights to find a company's family tree and view their corporate relationships.

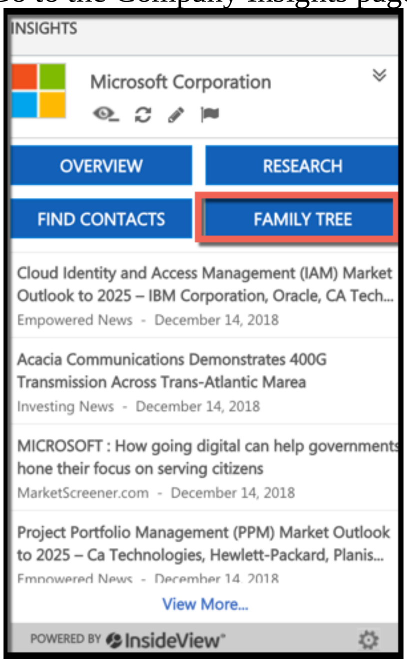
Understanding the Family Tree tab

The **Family Tree** tab allows you to discover subsidiaries, acquisitions, international divisions, and a host of other corporate relationships.

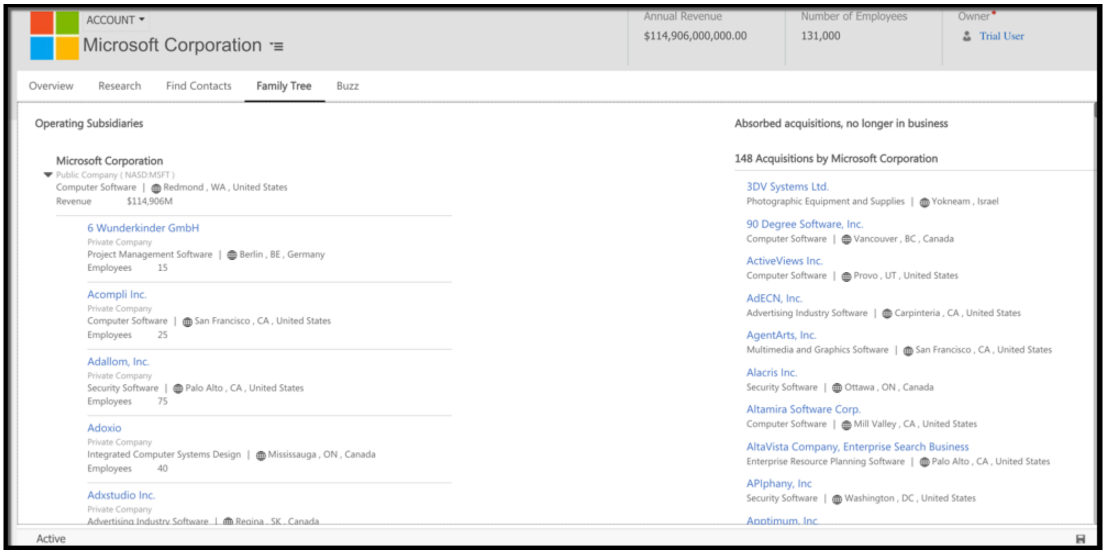
Getting to the Family Tree page

You can get to the Family Tree page from a company's view. Here's how:

1. Go to the Company Insights page.

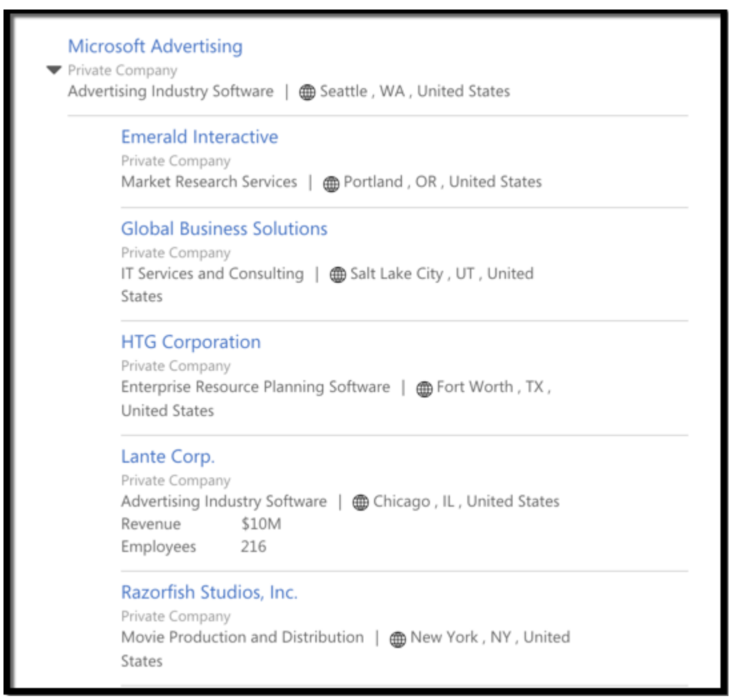


2. Click **Family Tree** to open the Family Tree page.



3. On the Family Tree page, you can discover the company's other locations, acquisitions and corporate relationships. The left pane displays all companies that are currently operational, in their respective family tree view. The right pane shows companies that have been full absorbed through an acquisition and are no longer in business.

4. To view the subsidiary company details, click the **Expand** ▸ button.



5. Click the **Collapse** ▾ button to close the company details view.

Chapter 9: Tech Profiler

This chapter helps you to use InsideView Insights to find new prospect companies based on the technology they use.

Understanding the Tech Profiler tab

Tech Profiler empowers you to find new prospects, plan account strategies and keep tabs on key target accounts based on technologies they use that are relevant for your sales and marketing teams. For example, if you sell to companies who also use Microsoft Dynamics 365 Online CRM, you will be able to find accounts and track companies that use that particular CRM.

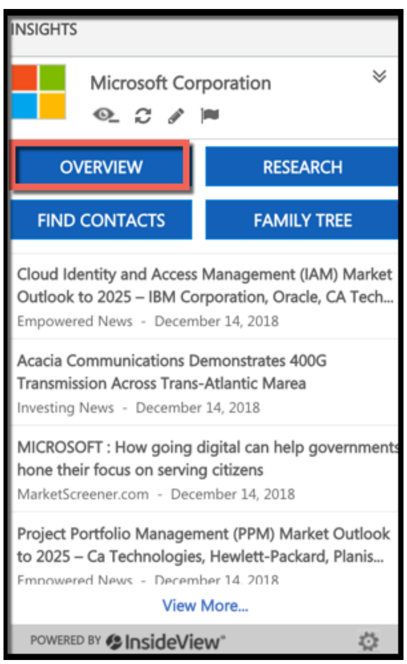
IMPORTANT: Tech Profiler is an add-on to InsideView Insights. In Insights solution, it appears only when you purchase Tech Profiler add-on for your Insights account separately as an additional tab on the Company Insights page.

Tech Profiler tracks 2,100 front-end and back-end hardware and software technologies. Over time this list will expand as the market demands. Tech Profiler is available for 525,000 companies across the United States and Europe.

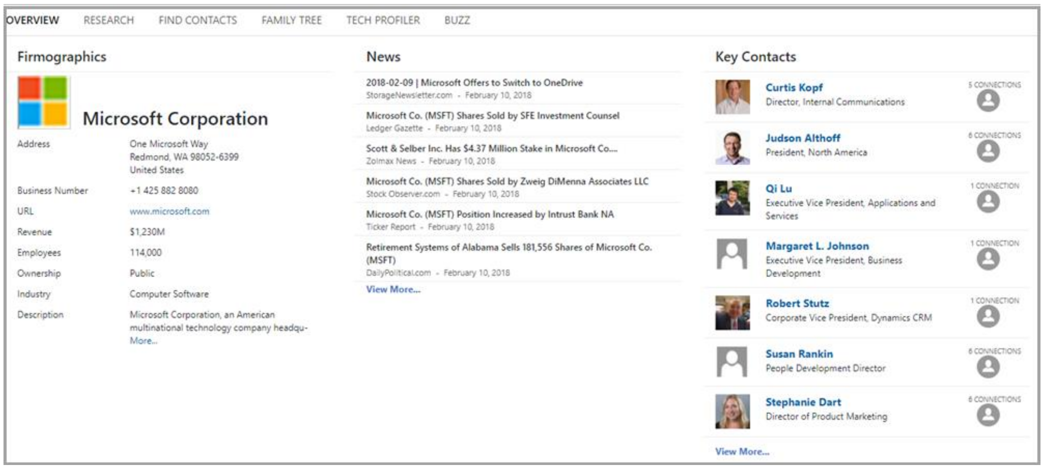
Getting to the Tech Profiler page

You can get to the Family Tree page from a company's view. Here's how:

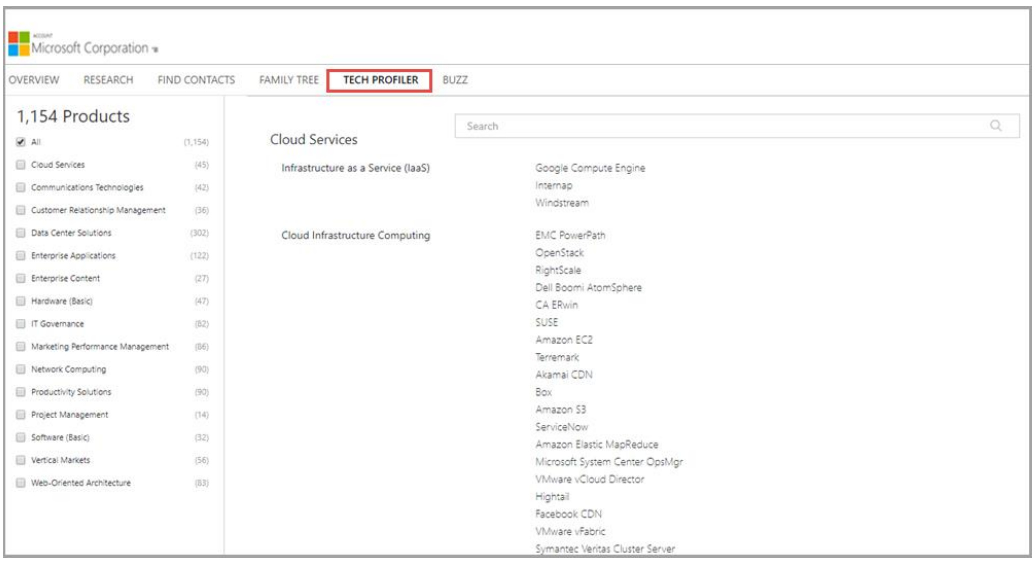
1. Go to the Company Insights page.



2. Click **Overview** to open the Company Overview page.

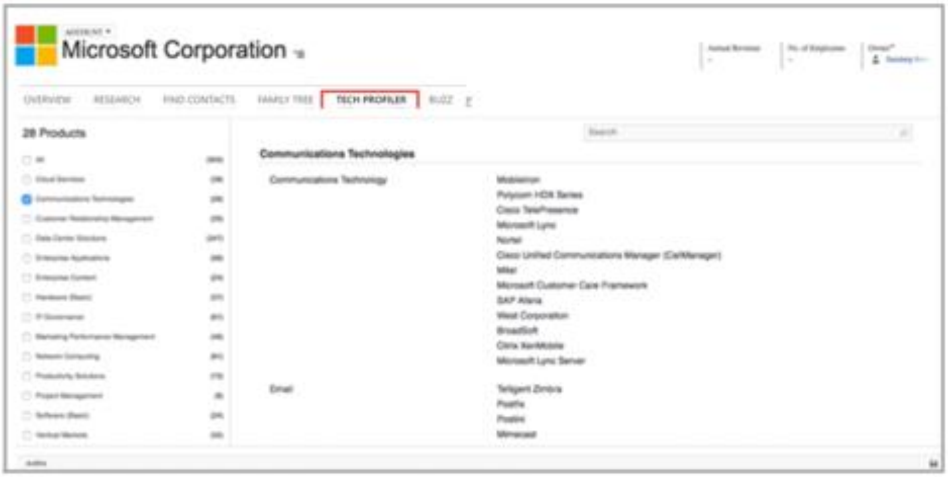


3. On the Company Overview page, select the **Tech Profiler** tab to view insights about technologies that a company is using.

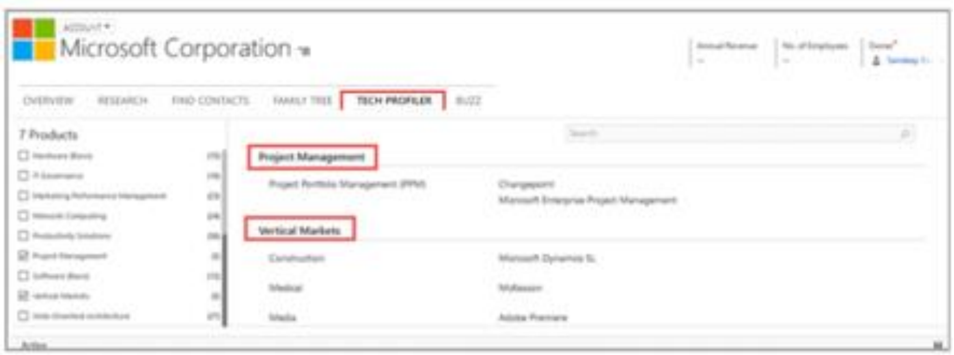


Note: Scroll to down to view all technologies and companies that are using it in the **Tech Profiler** tab.

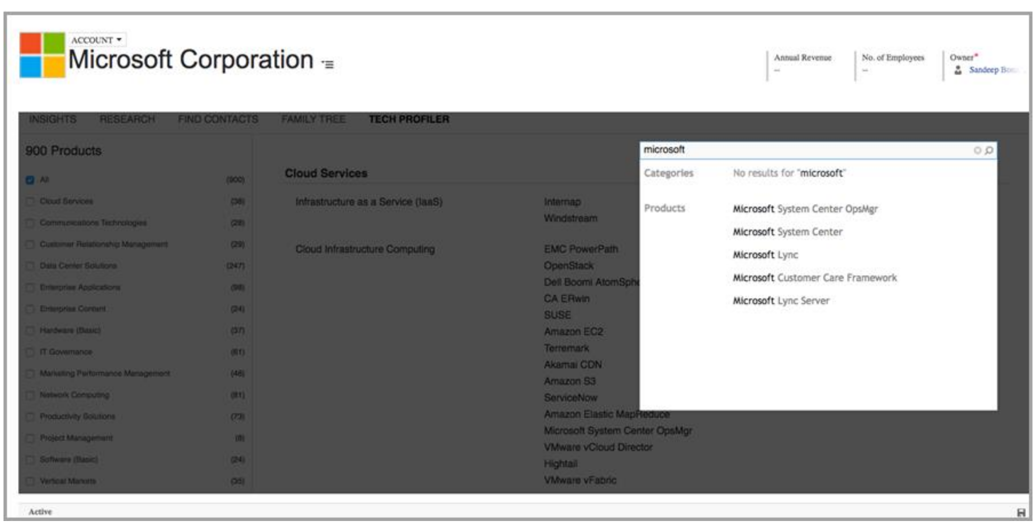
4. To view the companies that are using a specific technology, select the **Technology Name** check box. For example, if you want to view all companies that using **Communication Technologies**, select that check box.



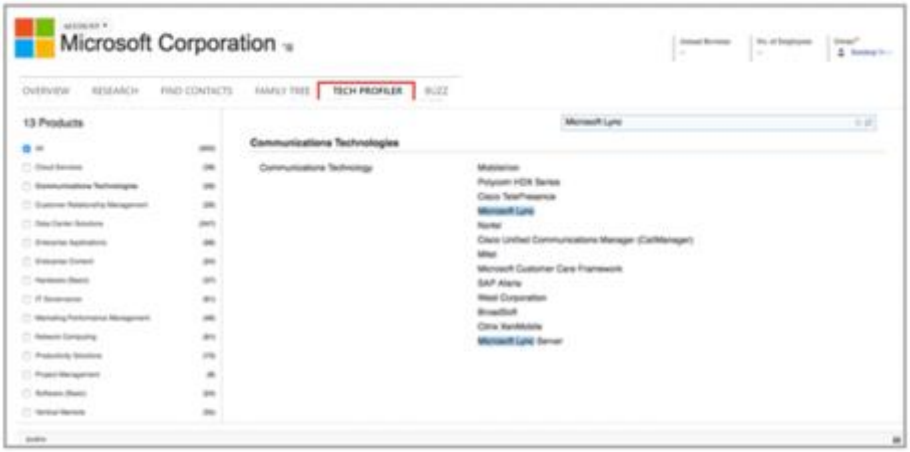
5. Select multiple technology name check boxes to view companies that are using those technologies.



6. Use the **Search** field to enter the company or technologies that you want find.



7. The Search results will display the technology that you are looking for.


Microsoft Corporation
OVERVIEW
RESEARCH
FIND CONTACTS
FAMILY TREE
TECH PROFILER
BUZZ
13 Products
Communications Technologies
Communications Technology
Polycom HDX Series
Cisco TelePresence
Microsoft Lync
Nortel
Cisco Unified Communications Manager (CallManager)
Mitel
Microsoft Customer Care Framework
SAP Alerts
West Corporation
BroadSoft
Citrix XenMobile
Microsoft Lync Server

Chapter 10: List Build

Insights offers an integrated *List Build,* which lets you identify companies or executives that match a particular set of search criteria.

Understand the List Build Feature

You can view the company and executive's firmographic data, save a search criteria, modify a saved search, and export the list of companies or people in an Excel spreadsheet. You can also add a company or an executive to the CRM, and to a Watchlist from the search results. You can add up to 20 records in a list at a time.

You can use the following search criteria to build a list of companies or executives for identifying business opportunities:

- **Location** – the geographic location for companies that you want to target. For instance, create a list of ideal companies or people in a specific location such as California State. The location filter is applicable only for Company's location.
- **Company Revenue** and **Size** – the number of employees (company size) and revenue in USD. For example, search for a list of companies' worth of 5 million US dollars revenue per annum with 300 to 500 employees.
- **Industry** – the industries and sub-industries a company belongs to. You can also use NAICS and SIC classifications of a company.
- **Ownership** – the ownership type of a company. For instance, you can select any one of the ownership type for a company: *Public*, *Private*, *School*, *Government*, or *All.*
- **Smart Agents** – the Smart Agents to search within news articles, press releases, SEC filings or keywords**.** For example, select the "Expanding Operations" news Agent to filter the list of companies that have been in the news in the last 30 days because they are expanding operations.
- **Connections** – the type of social media connections to build a list of prospects. For instance, you can build a list made up of companies whose employees include only *People you know*, or you can filter the list to show only companies where you have a *Connection*.

In order to build a list, simply select or enter the details in the List Build form with the information you'd like to match and search. You can follow the instructions in the next section to learn how to build a list in detail.

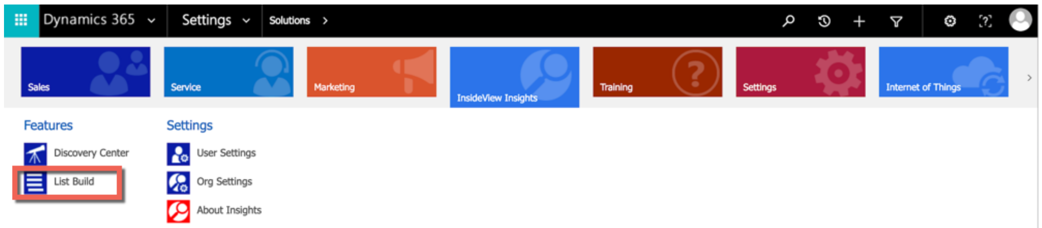
Getting to the List Build

You can launch the List Build from the Microsoft Dynamic 365 tile menu. The List Build launches a search page where you can enter your search criteria to find companies and executives. Here's how:

1. On the navigation bar, click the **Main** button.

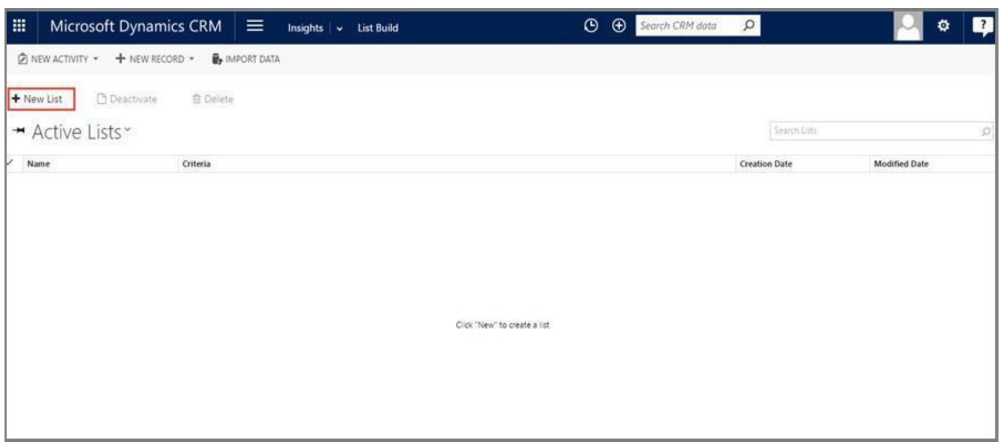
2. Go to the **InsideView Insights** work area.

3. Click the **List Build** button.



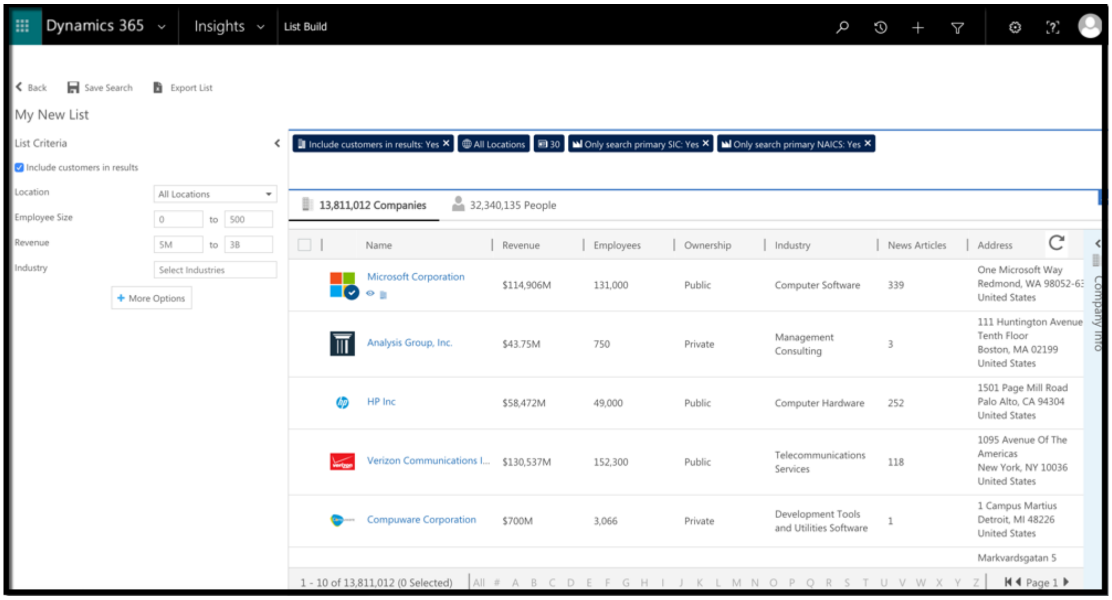
Note: The Org Settings button will be visible only to the Microsoft Dynamics CRM account administrator.

4. If you are launching the List Build page first time, click the **New List** button to enter the search criteria to find companies and people.



If you have already saved some search criteria in the List Build page, the next time when you open this page the saved search criteria appears. You can either modify that search criteria or create a new list of companies or people.

5. Enter the desired criteria to search for companies and people.



6. By default, all companies and people in the Insights database are displayed. You can drill to specific companies that you want to target using the search criteria selection using list of options.

List Build Functions

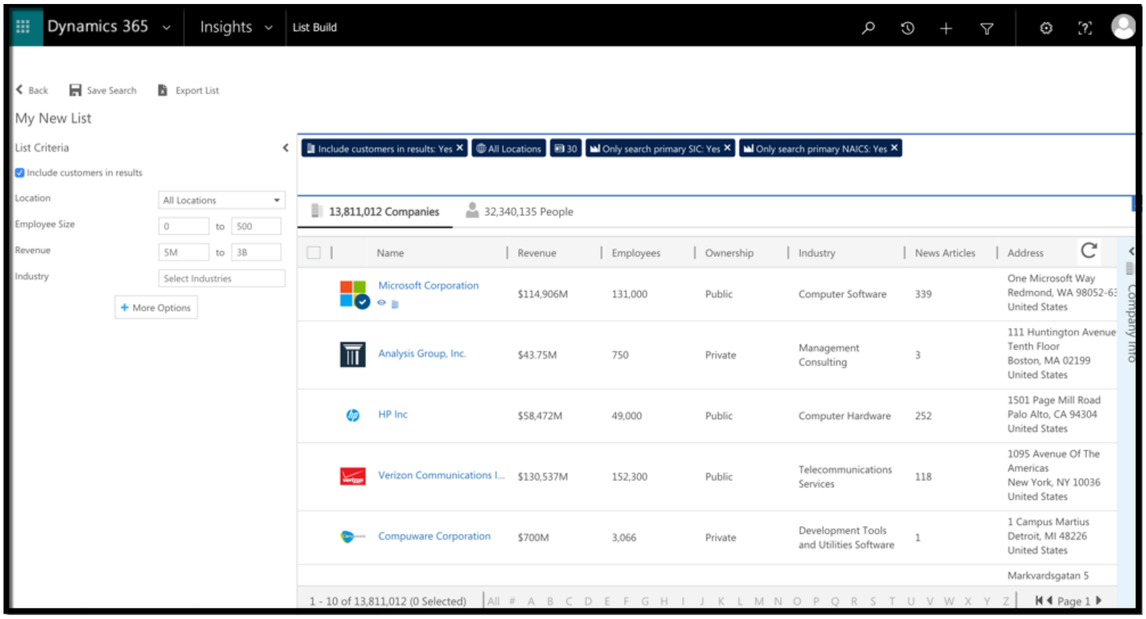
The List Build page offers an interactive Search Criteria pane where you can identify the required company and people with various filters that will help you start your business conversations. The List Build page lets you do the following:

- Build a list of companies and people
- Modify a save search criteria
- View company or contact’s firmographic data
- Add companies and people to CRM
- Add companies and people to the Watchlist
- Export a company or an executive information in an Excel spreadsheet
- Delete a company or an executive from the search results
- Export the list of companies and people in an Excel spreadsheet

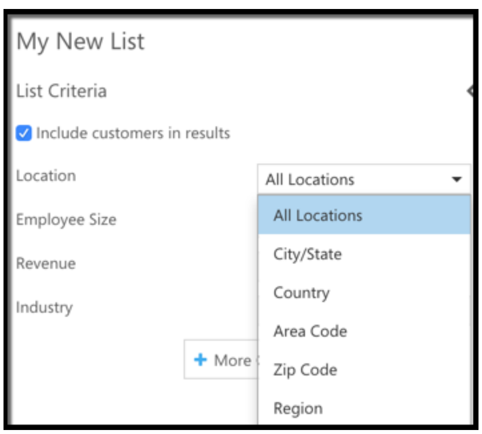
Build a List of Companies and People

The List Build page allows you to search for targeted companies and people using various search criteria. Here is how:

1. Go to the List Build page following the instructions in the Getting to the List Build section.

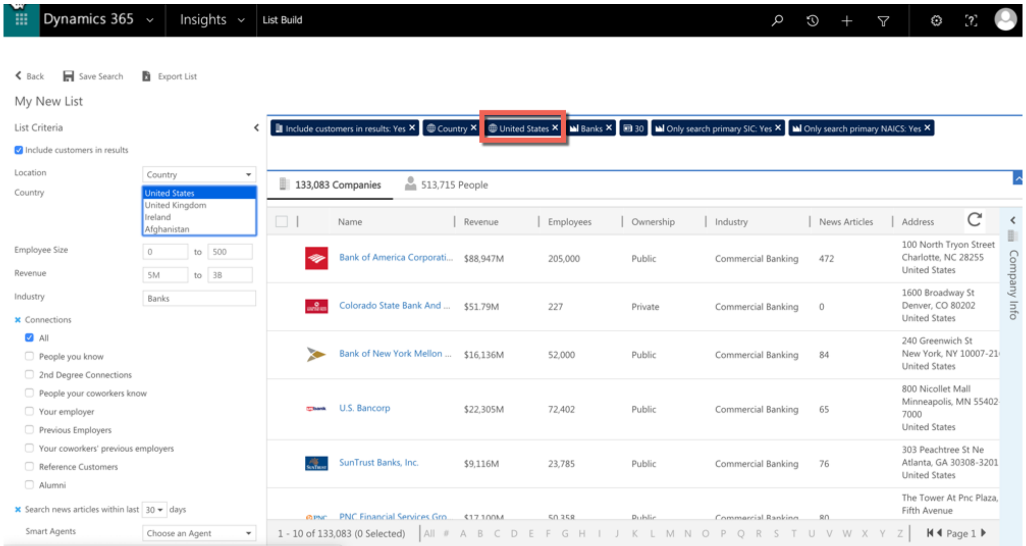


2. Search for a company with a specific location. The **Locations** option enables you to search for companies using the following geographical criteria.



- **All Locations**: Select to search for companies in all location across the globe.
- **City/State**: Select **City/State** from the **Locations** list then enter a city's name in the **City** field.
    - To search for companies within a particular state, enter the code for the state in the **State** field, and leave the **City** field blank. You can also enter the state name in this field. For example, New York.
    - To search for companies in a particular country, select the country name from the **Country** drop-down list.

- **Country**: Select **Country** from the **Locations** list, then, click the **Country** field and select the country name from the list. To select multiple countries, hold down the **Ctrl** or **CMD** key while clicking

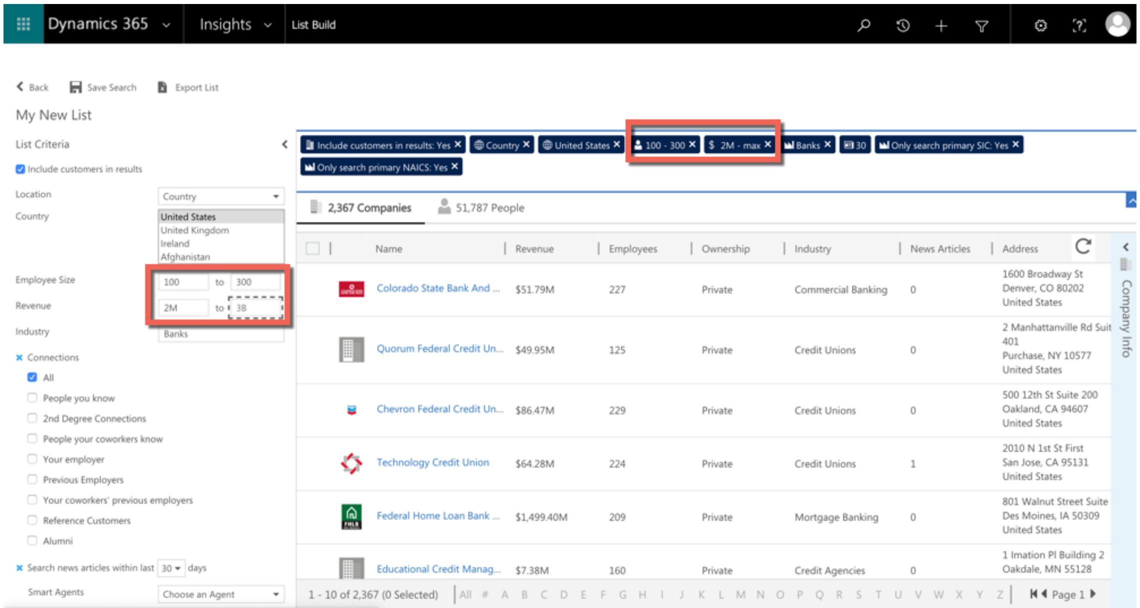


- **Area Codes**: Select **Area Codes** from the **Locations** list, then enter the area code(s) in the **Area Code** field to search for companies operating in specific areas. Use commas to separate multiple area codes.

- **Zip Codes**: Select **Zip Codes** from the **Locations** list, then enter the zip code(s) in the **Zip Code** field. Use commas to separate multiple zip codes.

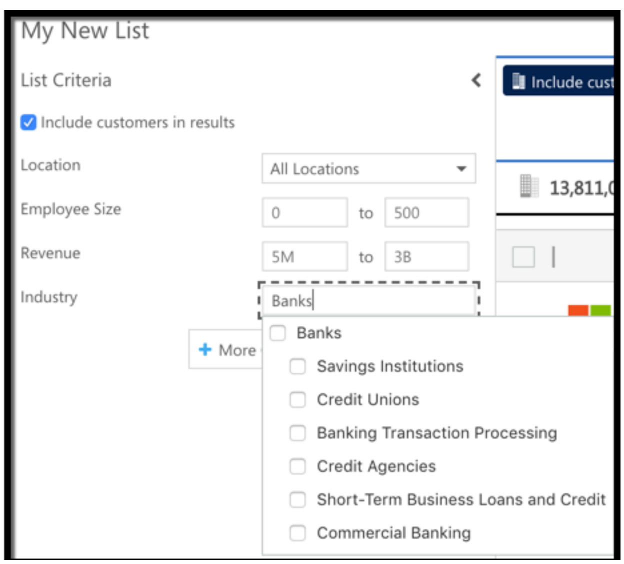
- **Regions**: Select **Regions** from the **Locations** list, then click the **Regions** field and select the geographical region such as Asia or Middle East from the drop-down list. To select multiple regions, hold down the **Ctrl** or **CMD** key while clicking.

3. Search for companies with employee size and revenue. Use the **Employee Size** and **Revenue** fields to enter a range for number of employees and the revenue of the companies you want to target. For example, if you enter 100 to 500 in the **Employee Size** and 2M to 3B in the **Revenue** field, the search returns only those companies with 100-500 employees working for them and with revenue that ranges from 2 million to 3 billion US dollars.

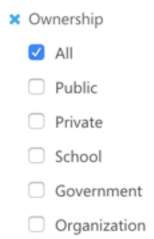


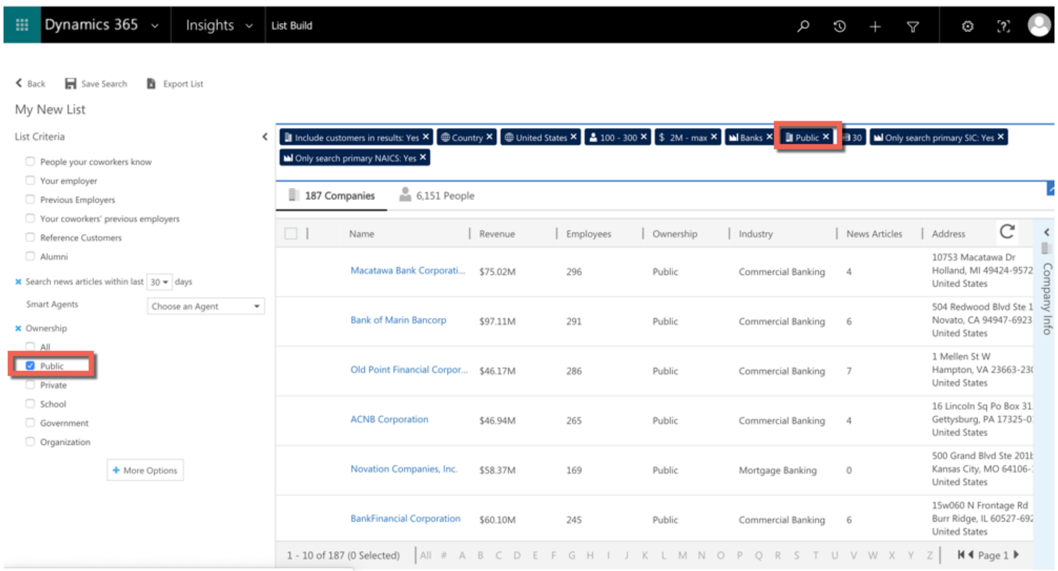
Note: The number of **companies** and **people** available in the company and people grids adjust automatically based on your search criteria.

4. To search with industry type, enter the industry name in the **Industry** field, then select any applicable sub-industries. For example, enter the word **Bank** in the **Industry** field and select **Banks**.

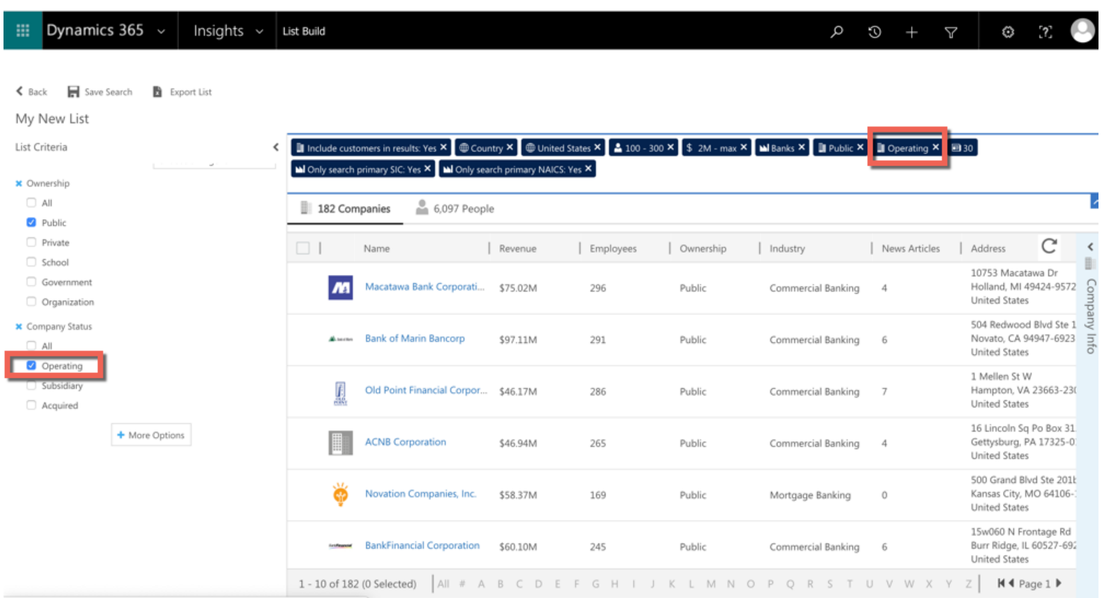


5. Select the ownership type of a company from the **Ownership** list of options. For example, select All, Public, Private, School, Government or Organization.



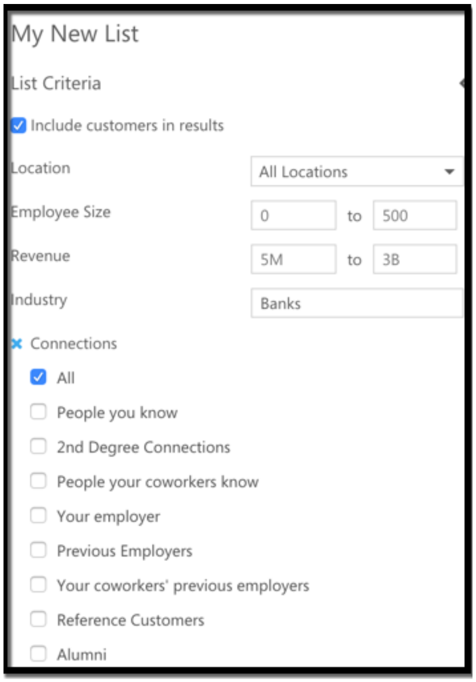


6. Select the status of a company from the **Company Status** list of options. For example, you can select All, Operating, Subsidiary, or Acquired.



7. To identify companies based on your connections, select **Connections** and search for companies based on the connection types that matter to you. For example, you can

select **People you know** with affiliations through your **Alumni** to find direct connections in the target companies. If you select **People your co-workers know** to find connections through their affiliations, your list will comprise companies your co-workers are connected to.



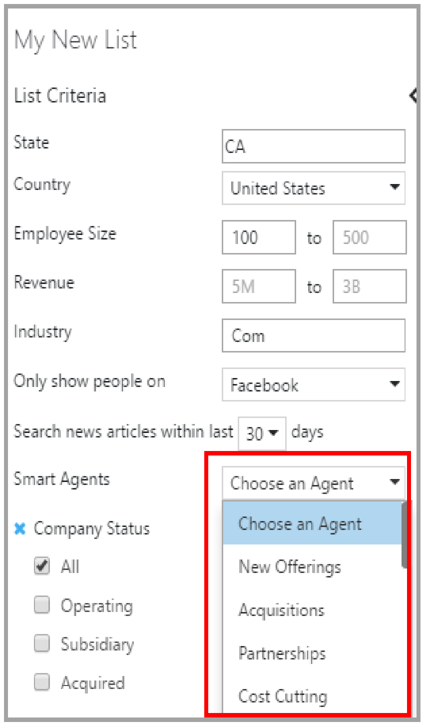
You can select the following connection types:

- All
- People you know
- 2nd Degree Connections
- People your coworkers know
- Your employer
- Previous employers
- You coworker's previous employers
- Reference Customers
- Alumni

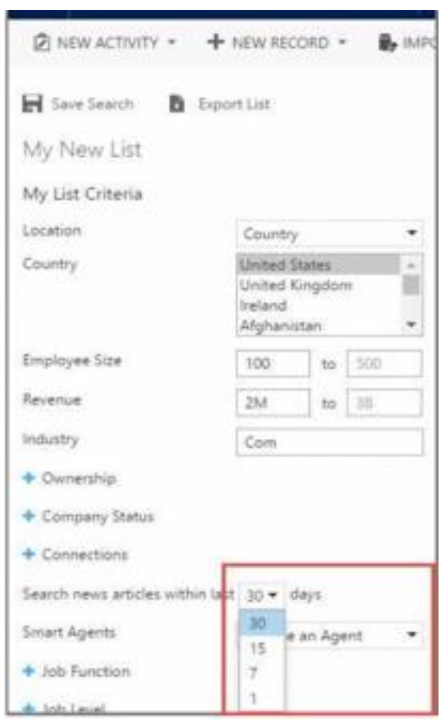
For more information, read the Set up your connections section.

8. Click **Smart Agents** to search for companies with use a News Agent or Keyword in your search. Smart Agents are used to group news articles into sales-relevant categories such as Leadership Changes, New Offerings and Expanding Operations. Apart from the standard smart agents, you can request Insight's support team to any customized smart agents. Here's how you can select an agent:

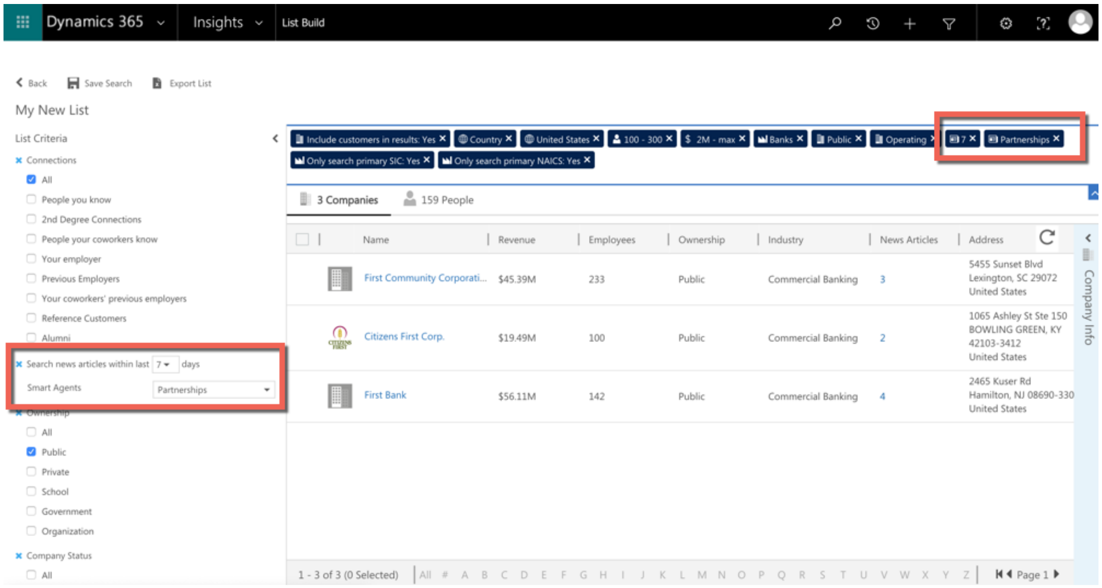
   - Click the **More Options** button and select the **Smart Agent** menu item and select agents from the drop-down list. For example, select **Partnerships**.



- To search news items with days, click the **Search news articles within last** drop list and select the number of days.

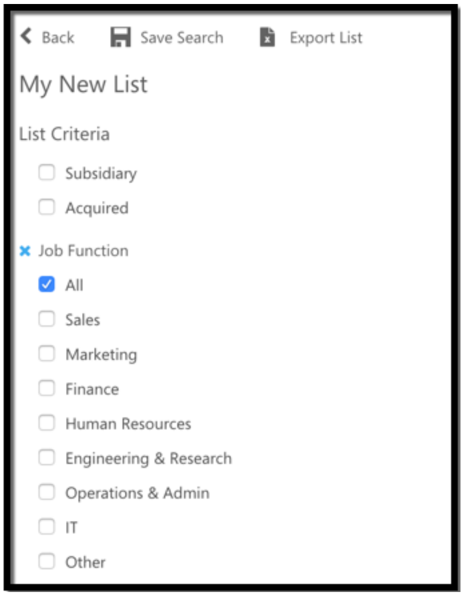


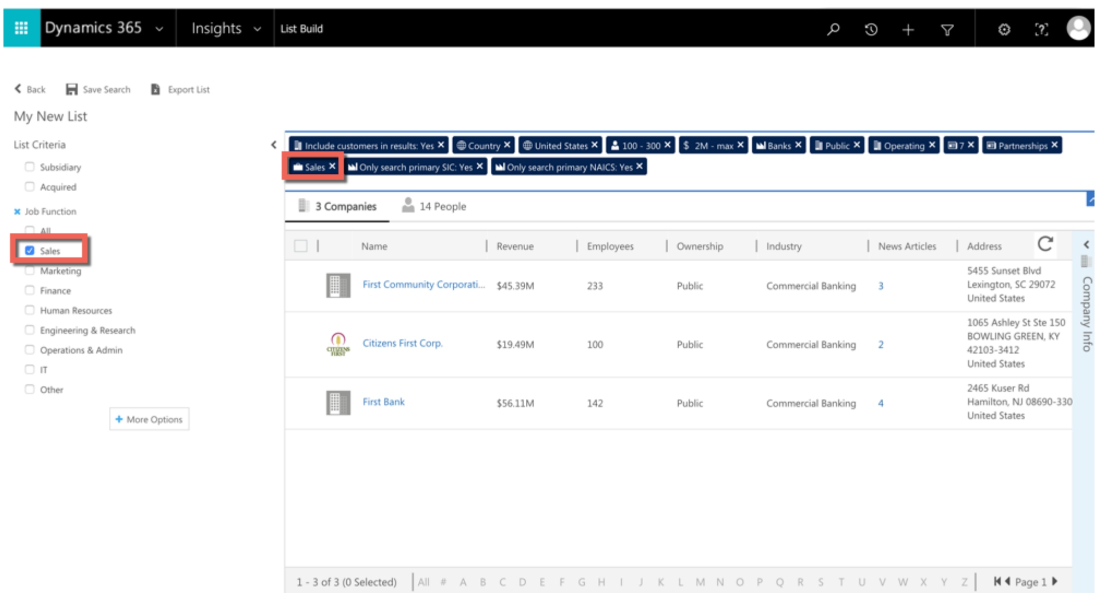
- When you select **Partnerships** smart agent and **7** for number of days, the search results are adjusted automatically.



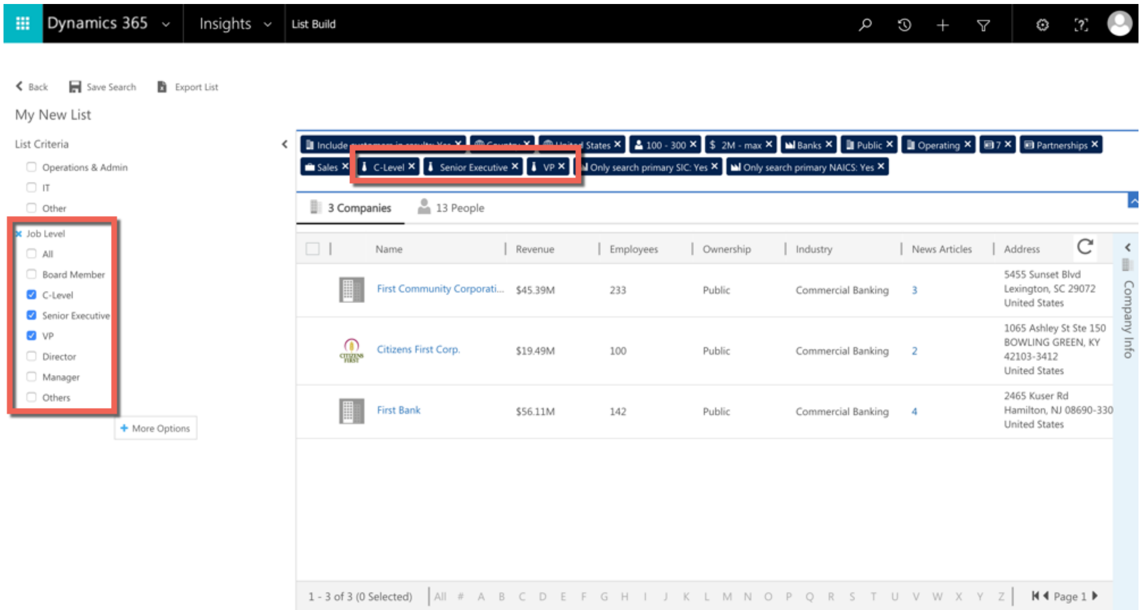
- To use a keyword in your search, click **More Options** and select the **Agent Keyword** menu item to enter the keyword that use want to search. For example, **Wells Fargo**. You can enter multiple keywords separated by a comma.

9. Click the **More Options** button and select the **Job Function** menu item to select the job function of executives that you want to search. For example, select **sales**. The search results adjusts as per your job function selection.

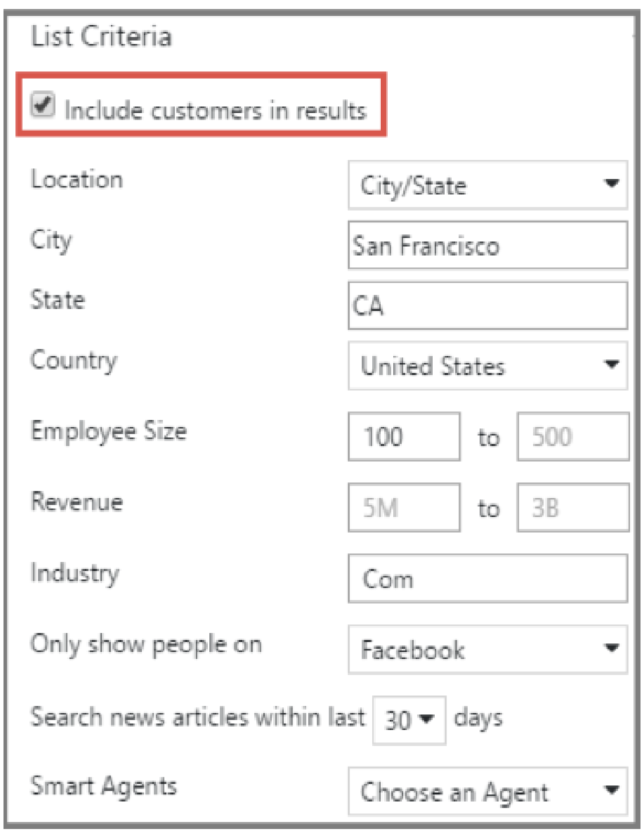




10. Click the **More Options** button and select the **Job Level** to search with the job level of an executive from the list. For example, select *C-Level*, *Director* and *VP* job levels.

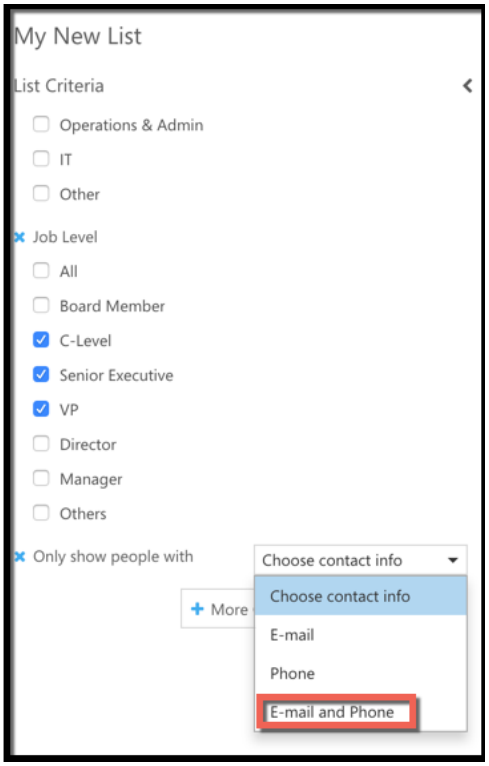


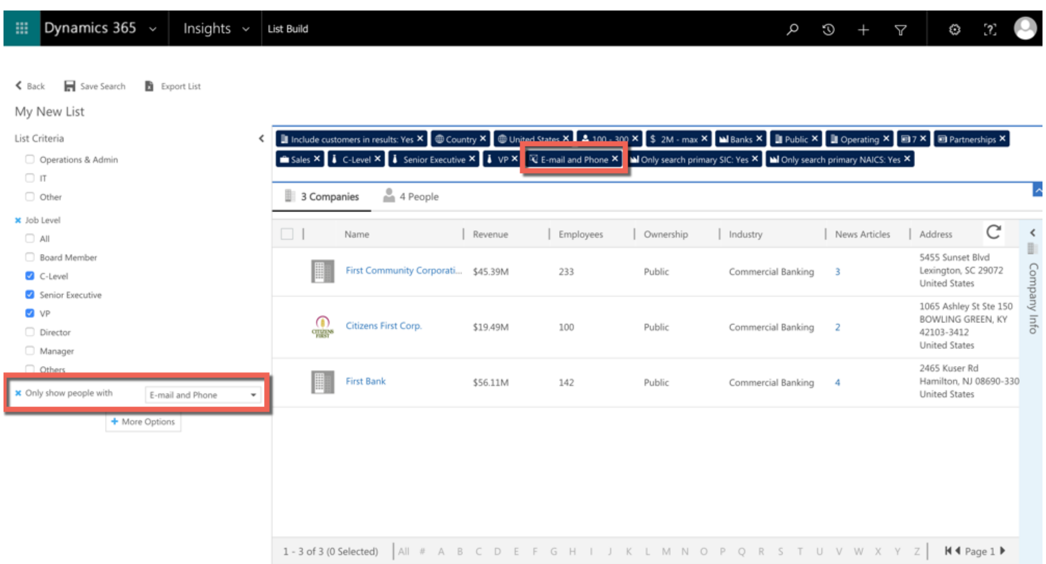
11. Select the **Include customers in results** check box if you would want to include all reference customers you added in the results. When you do this and build a list, all companies you added as reference customers will be included in the search results.



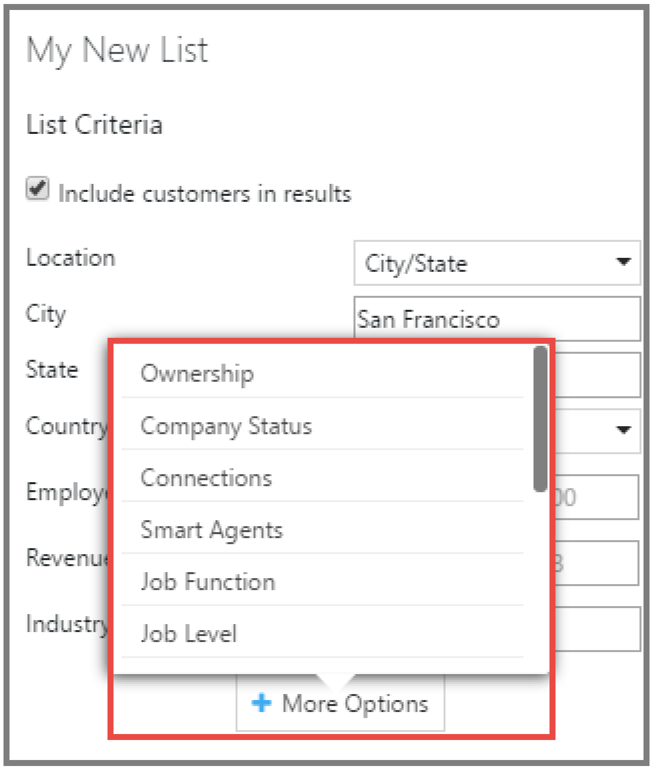
12. Click **Only show people with** and select any of the following option to view search results:

- **Email** – shows all executives with email addresses.
- **Phone** – shows executives with phone numbers.
- **Email and Phone** – shows executives with both email and phone numbers.



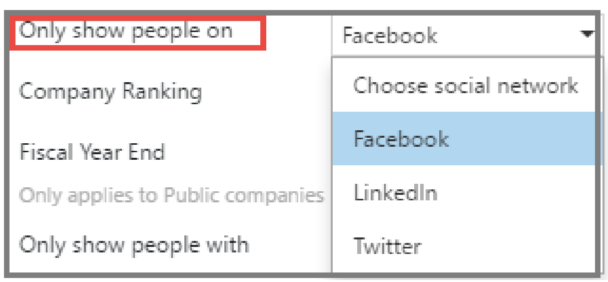


13. To add other search criteria, click **More Options.**

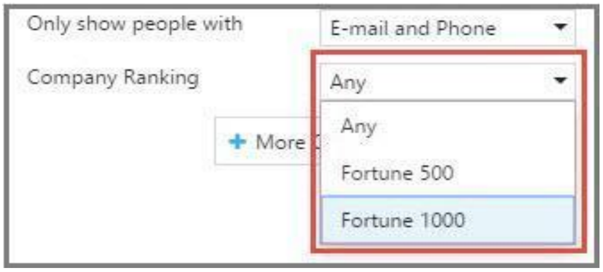


14. Enter the following Search Criteria:

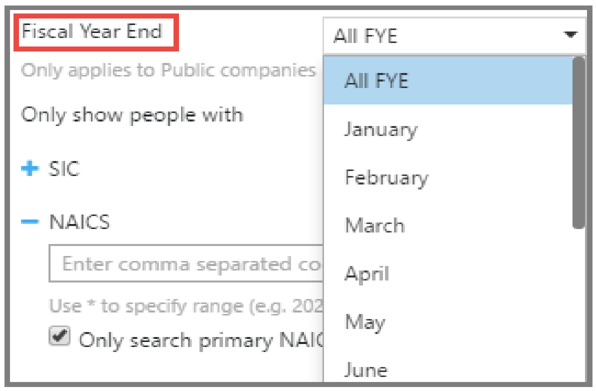
- **Only show people on** – Use this option to search for executives who are on one of the following social networking sites: Twitter, LinkedIn, or Facebook.



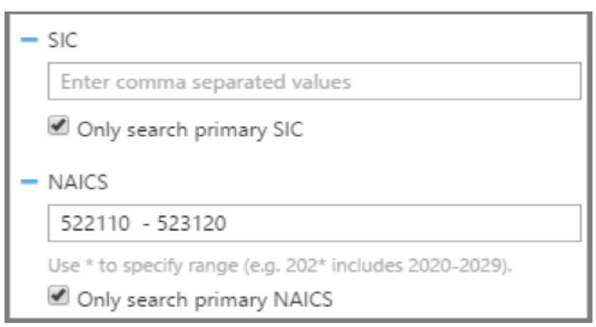
- **Company Ranking** – Use this option to select the ranking. By default, Ranking is set to **Any**. You can select either **Fortune 500** or **Fortune 1000** ranking.



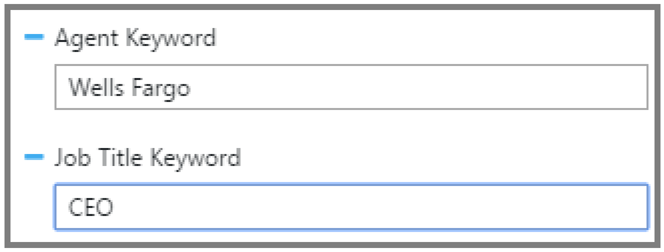
- **Fiscal Year End** – Select the fiscal year end month of a public company from the drop-down list.



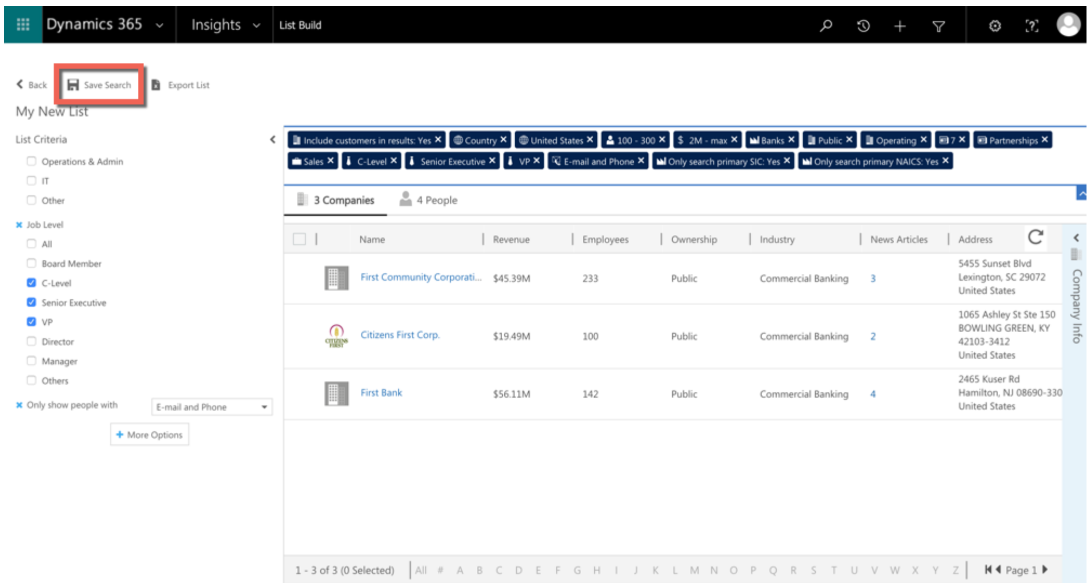
- **SIC** – Enter the Standard Industry Classification (SIC) codes of a company.
- **NAICS** – Enter the North American Industry Classification System (NAICS) code of a company. The maximum number of NAICS codes that you can enter is 150 for each search. You can enter multiple NAICS codes separated by a commas.



- **Agent Keyword** – Search the companies and people by agent keyword.
- **Job Title Keyword** – Enter job title to search for executives. For example, CEO and Manager.

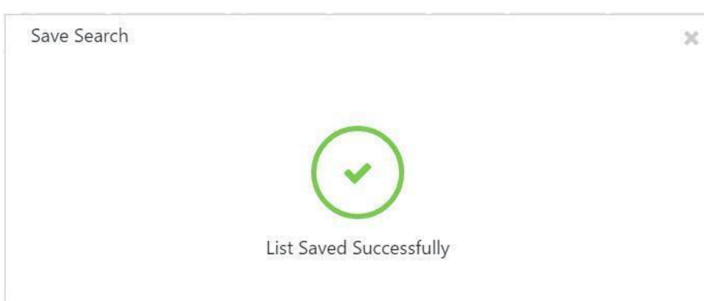


15. Click **Save Search**.



16. Enter the name for your list and click **Submit.**

17. The save search successful message appears.

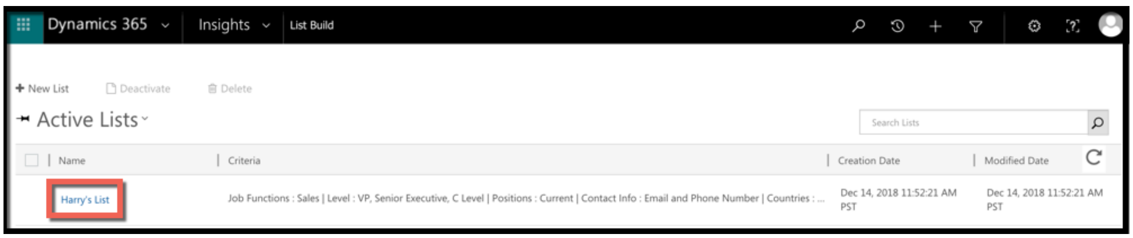


Modify a Search Criteria

The List Build page allows you to modify a list by adding companies or executives to an existing list. Here is how:

1. Go to the List Build page following the instructions in the [Getting to the List Build]() section.

2. The **Active Lists** page shows all your saved searches.



3. Click the **List Name** link and modify the search criteria. For more information, follow the instructions in the [Build a List of Companies and People]() section.

4. To deactivate the list, click the **Deactivate** button.

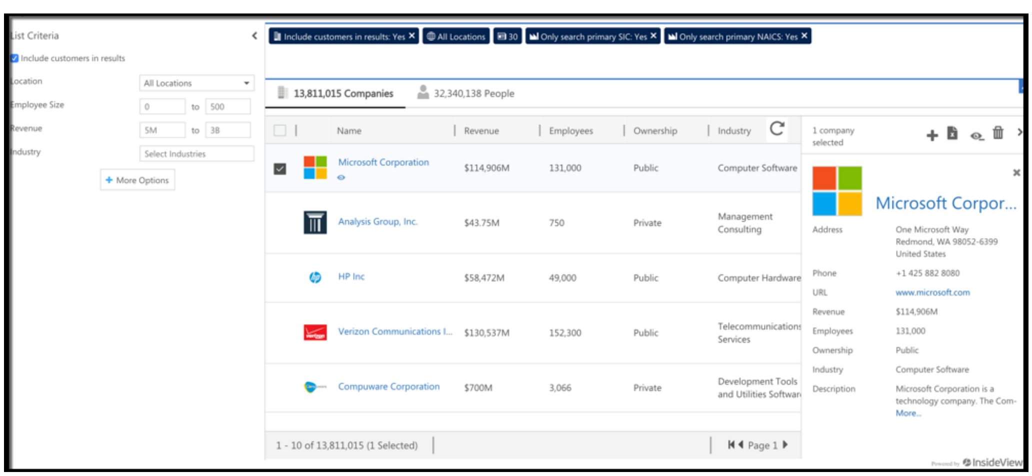
5. To delete the list, click the **Delete** button.

View a Company or an Executive's Firmographic Data

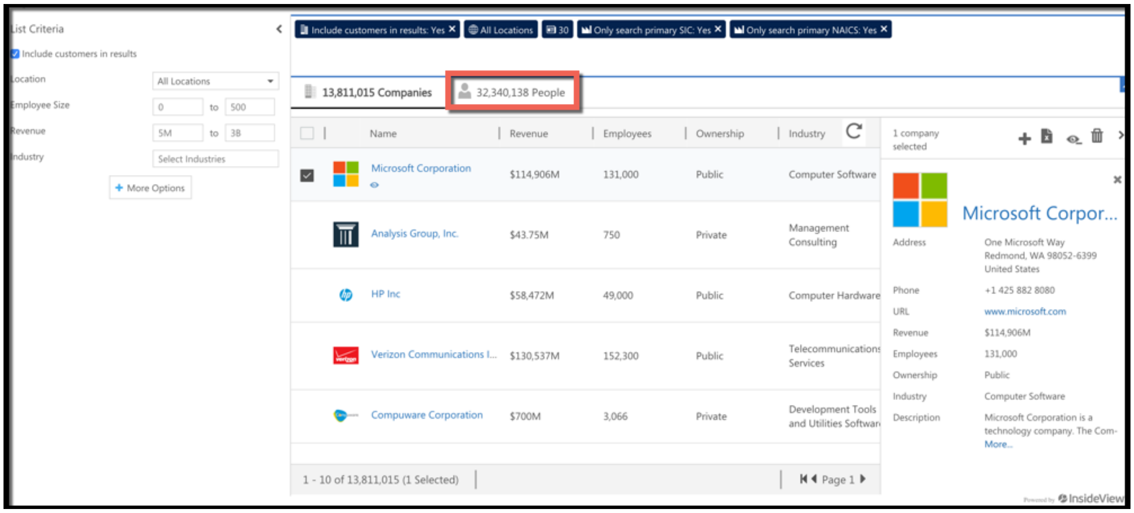
The List Build page allows you to view a company or an executive's firmographic data. You can also select multiple executives to view their firmographic data. Here is how:

1. Go to the List Build page following the instructions in the [Getting to the List Build]() section.

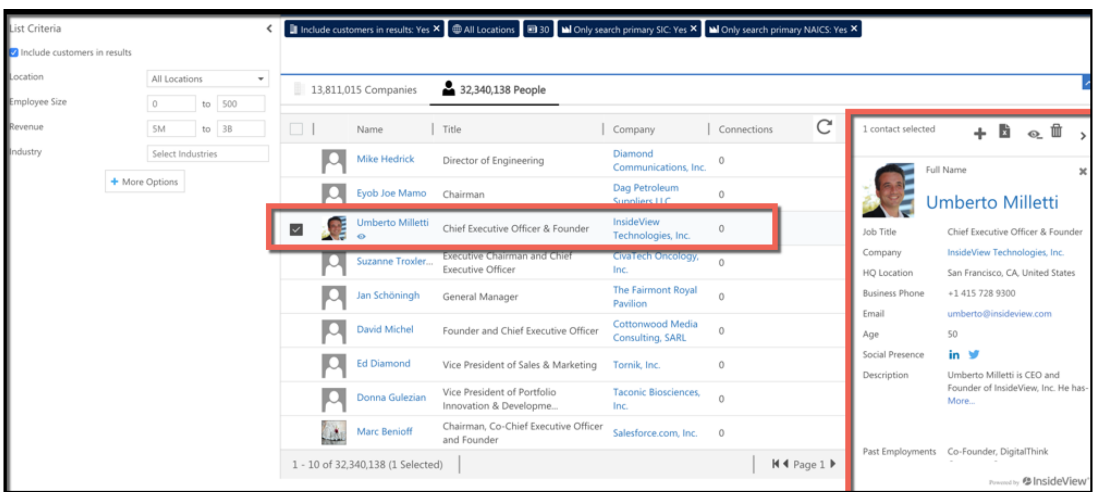
2. Click on any **Company** row to view the company details in the right pane.



3. To view an executive's firmographic data, click the **People** tab.



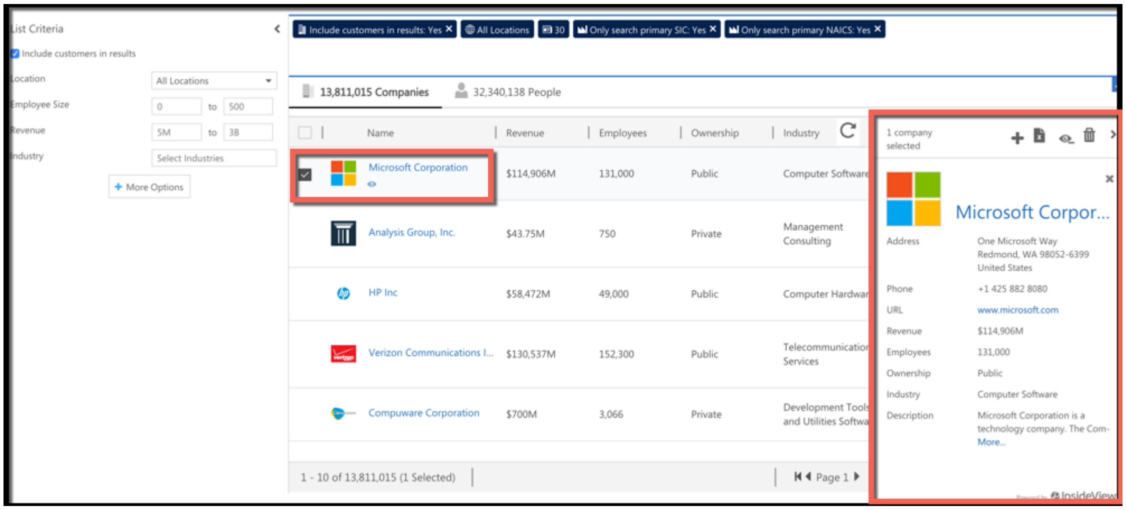
4. Select an executive to view the contact information.



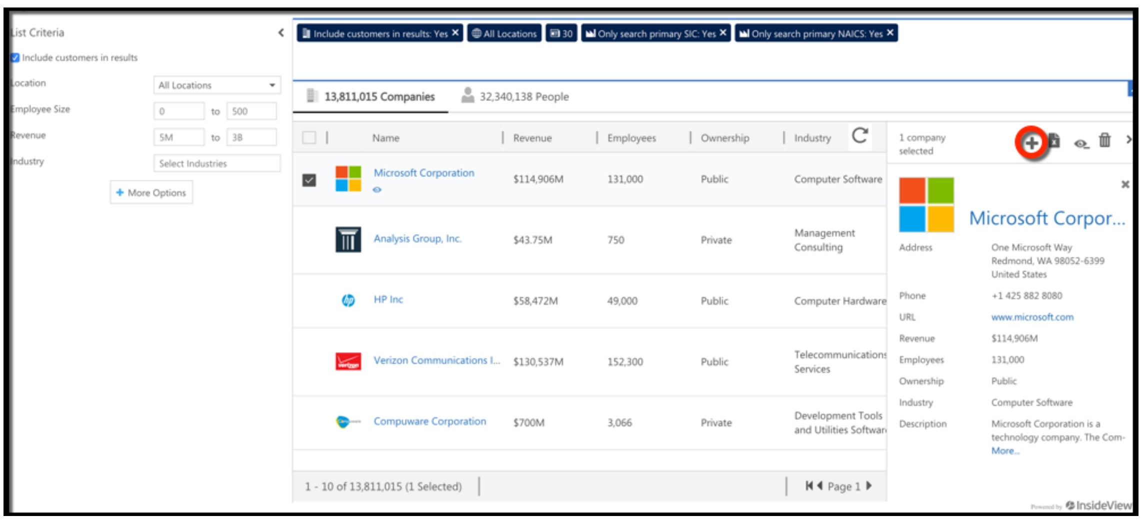
Add a Company or an Executive to the CRM

The List Build page allows you to add a company account or an executive to the Microsoft Dynamics 365 and On-premises environment. Here is how:

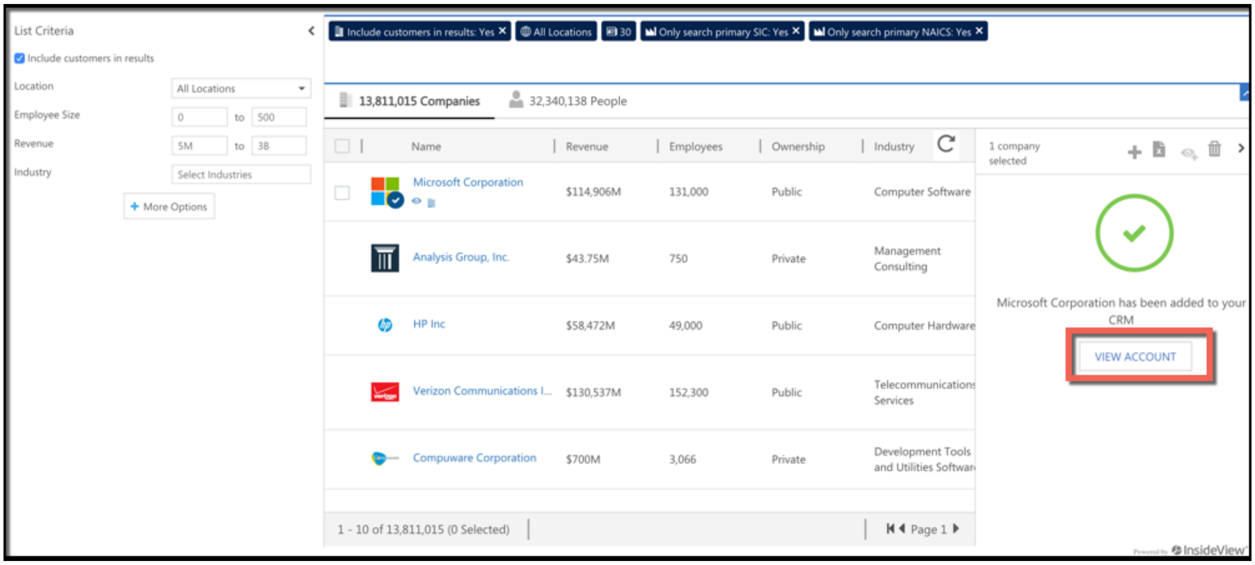
1. Go to the List Build page following the instructions in the Getting to the List Build section.



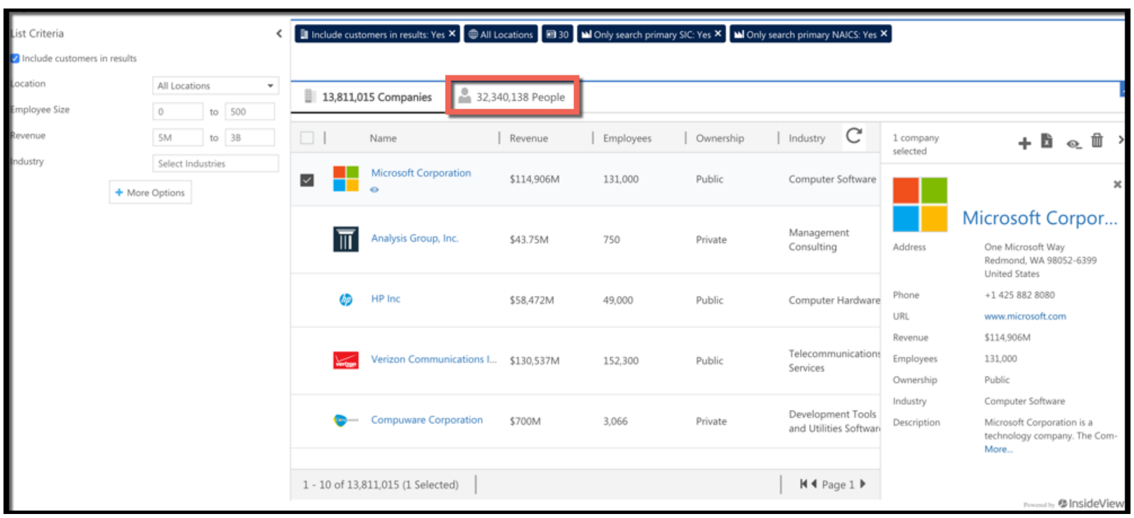
2. Select a company that is not in your CRM and Click the **Add to CRM** button .



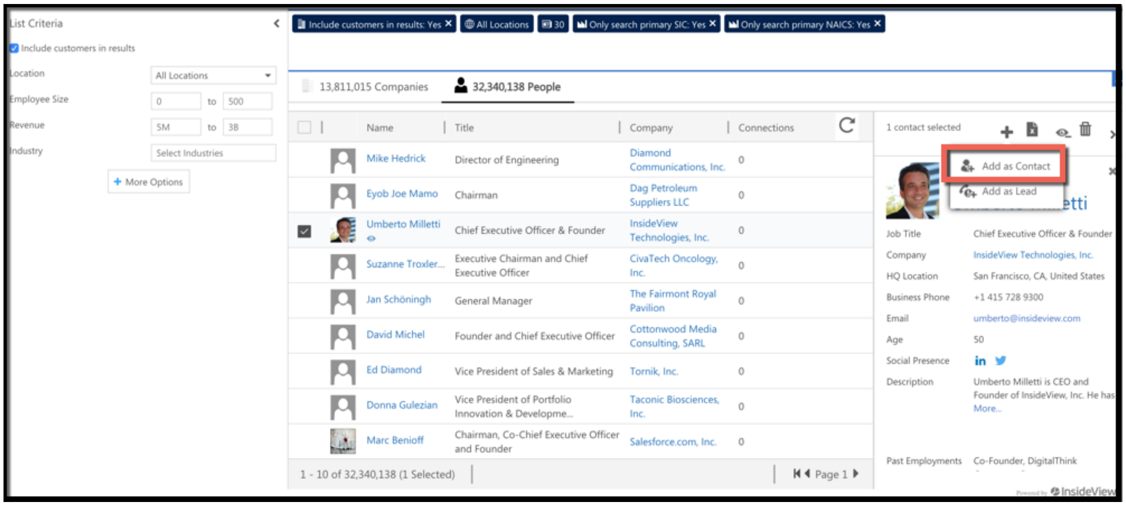
3. The company account is added in CRM and the **View Account** button appears.



4. To add an executive to the CRM, on the Search Results page, click the **People** tab.



5. Select an executive and click the **Add to CRM** button **+** . You can select either **Add as Contact** or **Add as Lead**.



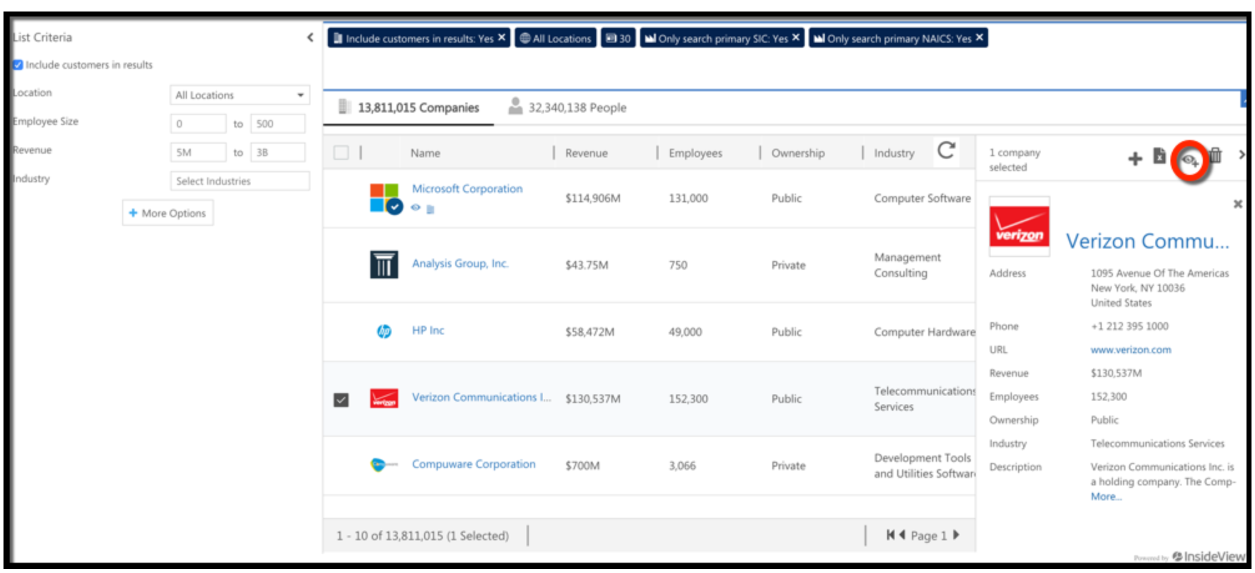
6. When you click the **Add as Contact** button, the executive information is added in the CRM and the **View Contact** button appears.

   Note: You can also select multiple companies and people, then click **Add to CRM** to add them in the CRM.

Add a Company or an Executive to the Watchlist

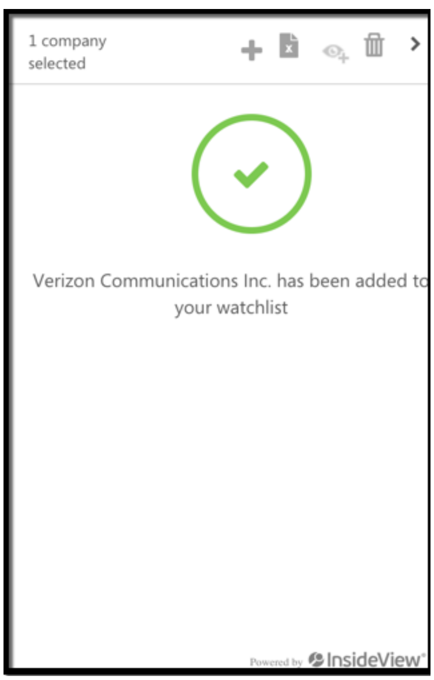
The List Build page allows you to add a company account or an executive to the Watchlist to follow them for latest business updates and industry trends. Here is how:

1. Go to the List Build page following the instructions in the [Getting to the List Build] section.

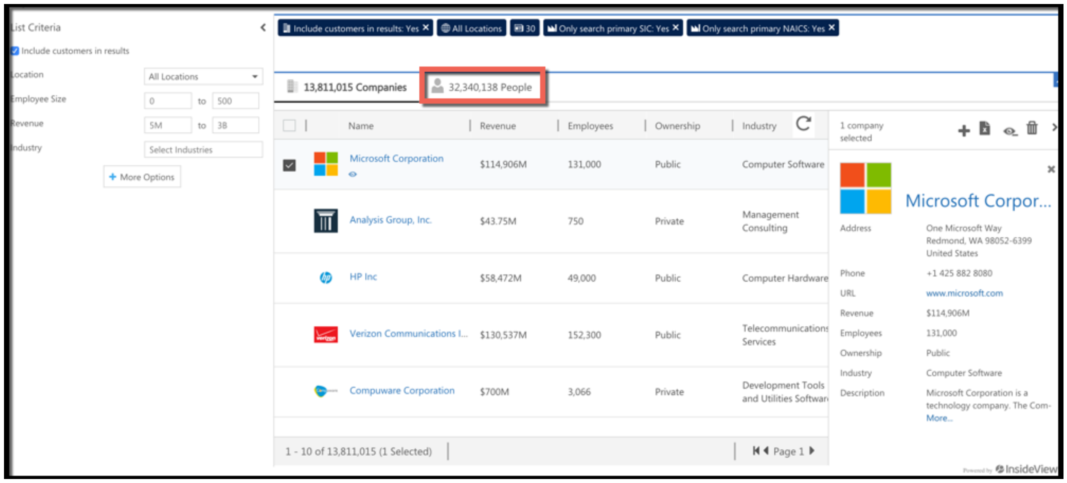


2. Select a company and click the **Add to Watchlist** button.

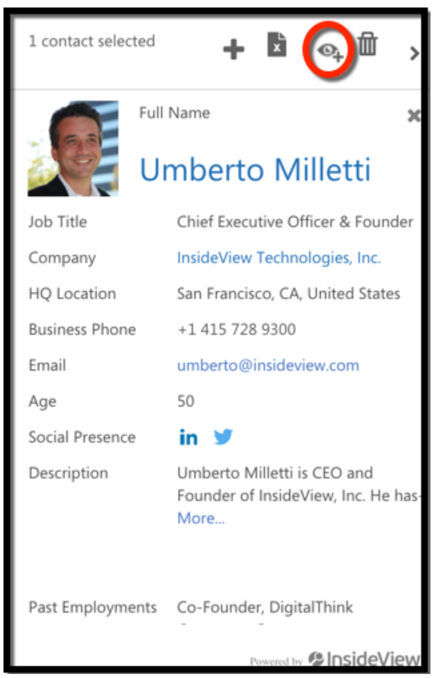
3. The company is added to your Watchlist.



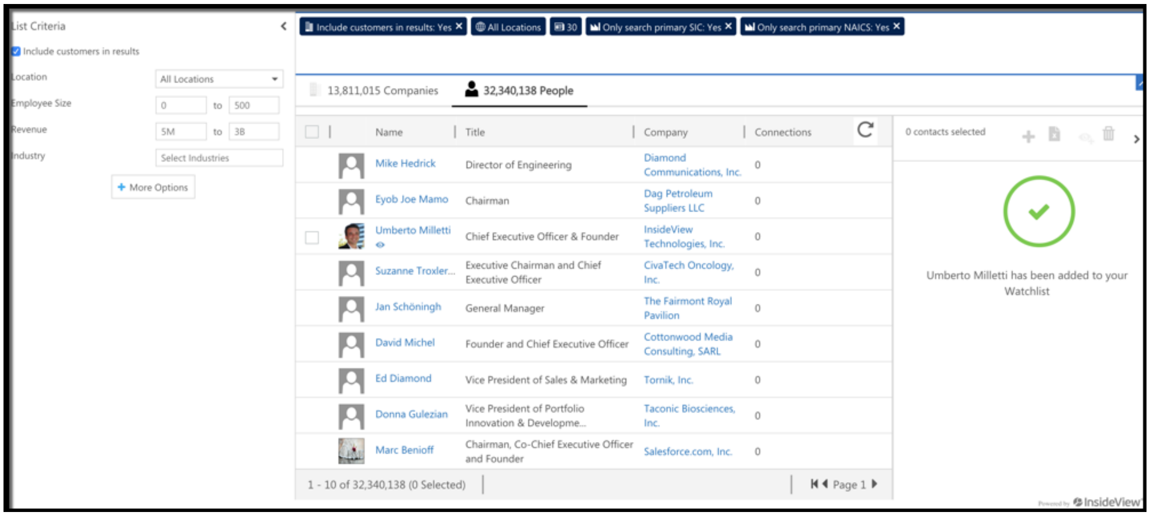
4. To add an executive to the Watchlist, on the Search Results page, click the **People** tab.



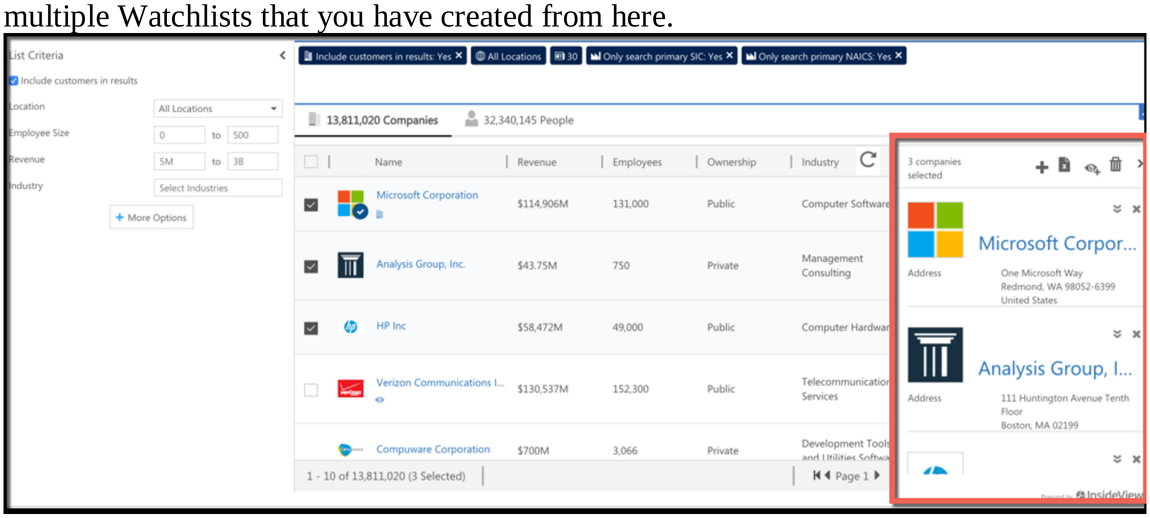
5. Select an executive and click the **Add to Watchlist** button .



6. The executive is added to your Watchlist.



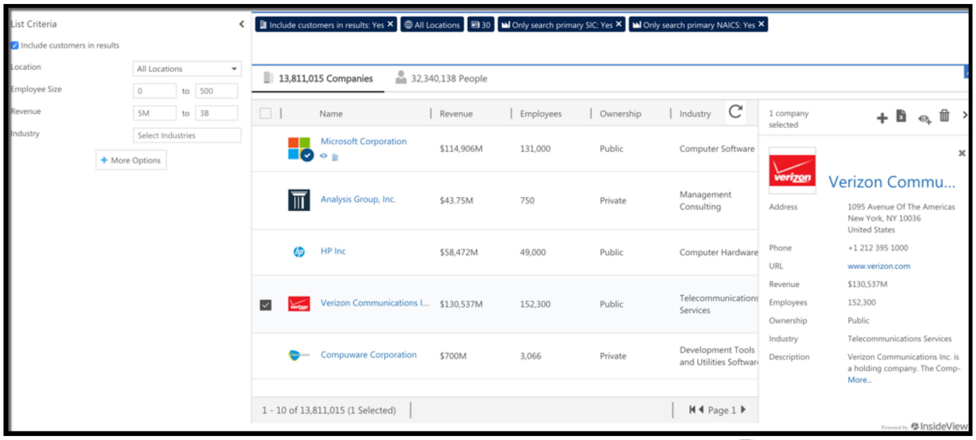
7. You select multiple companies and executives, then click the **Add to Watchlist** button to add them to the Watchlist. You can also add companies or people to multiple Watchlists that you have created from here.



Export a Company or an Executive from Search Results

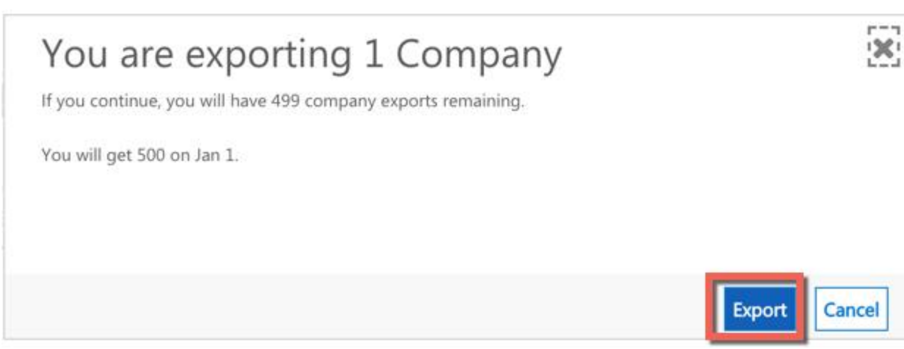
The List Build page allows you to export a company account or an executive from search results in the Microsoft Excel (.xlsx) spreadsheet file. Here is how:

1. Go to the List Build page following the instructions in the Getting to the List Build section.



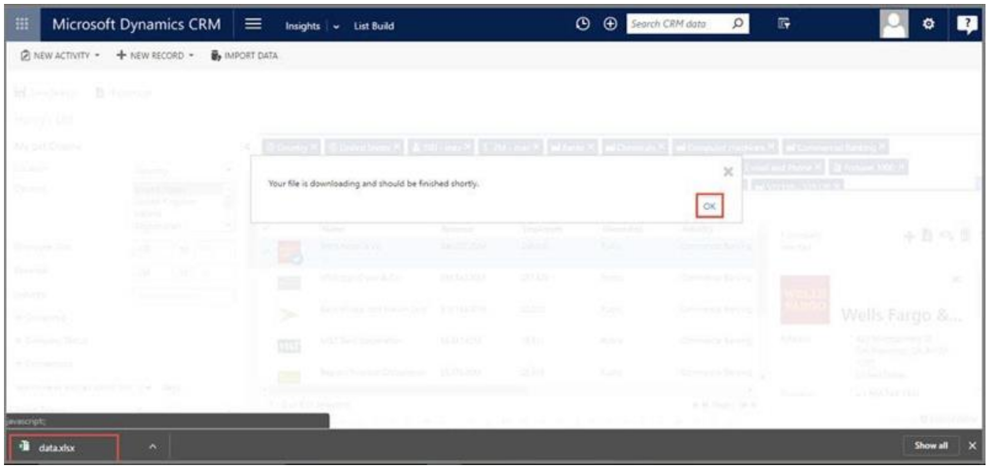
2. On the Search Results page, click the **Export List** button .

3. The Export message appears.

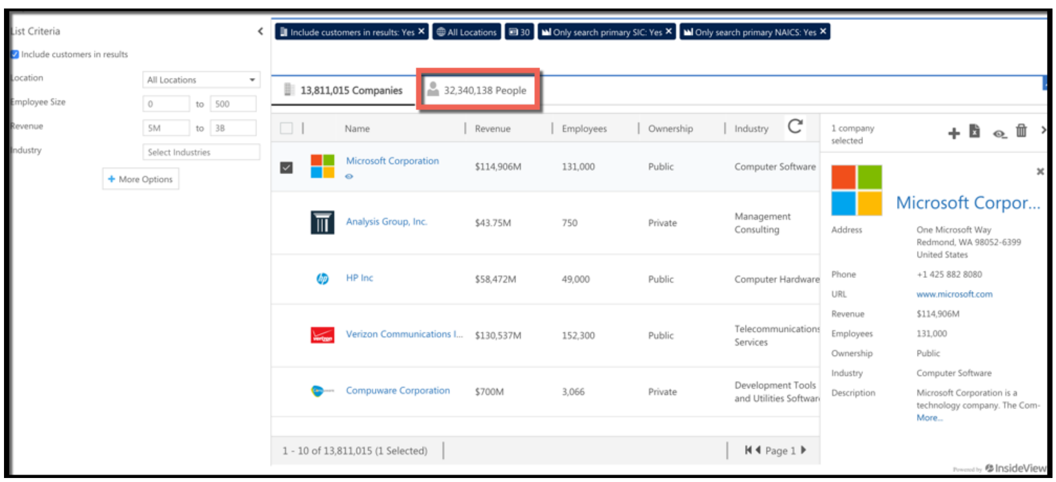


Note: The number of company and people records you can export depends on your Insights account limit.

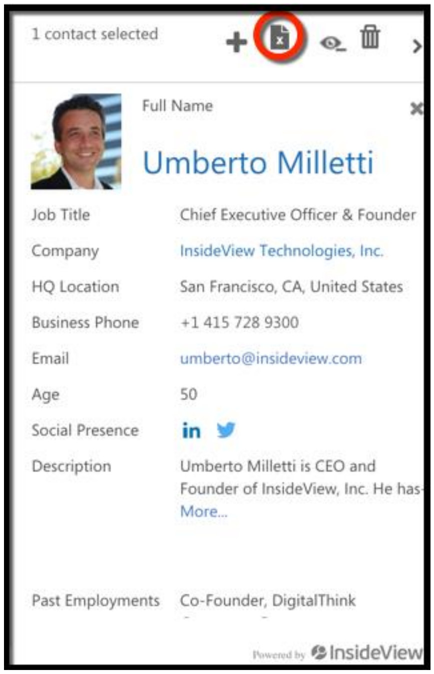
4. Click **Export**. The **data.xlsx** file is downloaded.



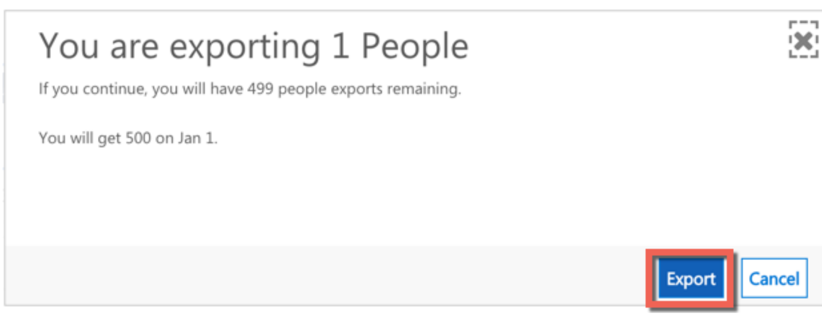
5. To export an executive detail, on the Search Results page, click the **People** tab.



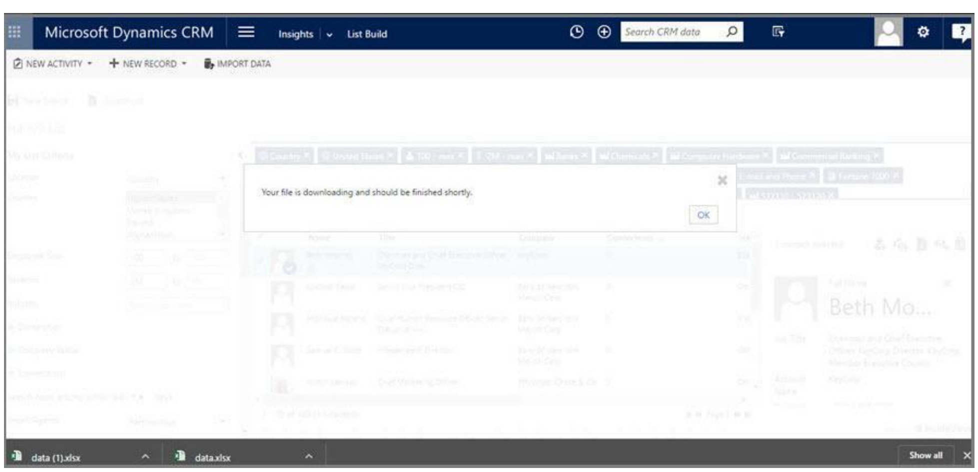
6. Select an executive and click the **Export List** button to export that particular executive's information.



7. The Export message appears.



8. Click **Export**. The **data.xlsx** file is downloaded.



Export or Sync Limits for Insights Users

The number of companies and contacts that you can export depends on the Insights credits that are added by default based on your Insights license. Refer to the table below for details. If you are a free Insights user, your unused credits expire at the end of each month. However, if you are using Insights Enterprise license, your unused credits roll over to the next month and get accumulated in your monthly balance.

You can export the following information:

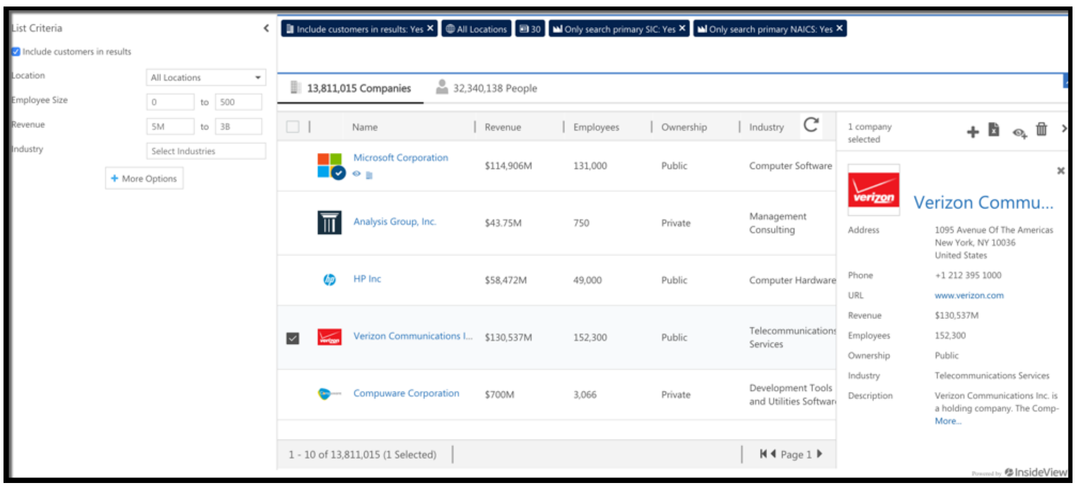
Version	Feature	Sync, Bulk Exports, or Add to CRM Limit	Export to CSV Limit
4.2 and 4.3	List Build Find Contacts Discovery Center	**500** each for both Contact and Company sync and export to CRM for Enterprise license users. **Unlimited** for both Contact and Company sync and export to CRM for Insights license users.	**500** credits each for Company and Contact export in a .csv file or .xlsx file and bulk export from the List Build for Enterprise license users. **500** credits each for Company and Contact export in an .xlsx file and bulk Export from the List Build for Insights license users.
4.1	List Build Find Contacts Discovery Center	**500** each for both Contact and Company sync and export to CRM for Enterprise license users. **Unlimited** for both Contact and Company sync and export to CRM for Insights license users.	**500** credits each for Company and Contact export in a .csv or .xlsx file and bulk export from the List Build for Enterprise users. Export to CSV is not available for Insights license users.
3.4 (End of support for this version)		**500** each for both Contact and Company sync and export to CRM for Enterprise license users. **Unlimited** for both Contact and Company sync and	**500** credits each for Company and Contact export in a .csv or .xlsx file and bulk export from the List Build for Enterprise users via standalone. Export to CSV is not available for Insights license users.

		export to CRM for Insights license users.	

Delete a Company or an Executive from Search Results

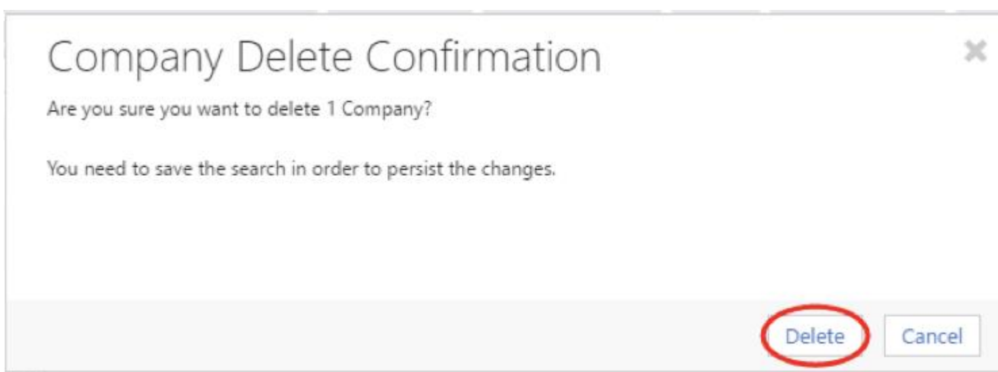
The List Build page allows you to delete a company account or an executive from the Search Results page. You can delete a company or an executive if you are not targeting them for business opportunities, if they are not in your list of prospects or if they are already your prospect then you delete them to save your Insights account credit balance. Here is how:

1. Go to the List Build page following the instructions in the [Getting to the List Build](#) section.



2. Select a company and click the **Delete** button .

3. On the Delete Confirmation popup, click **Delete**, then click the **Save Search** button to save changes.



4. The selected company is deleted from the search results only. You can delete multiple companies from the Search Results page.

5. Follow the same instructions to delete executives.

Chapter 11: Discovery Center

InsideView Insights offers the *Discovery Center*, which lets you research a company and a contact.

Understanding the Discovery Center

You can view the firmographic data, key contacts and company news. You can also add a company to a Watchlist from the search results.

The Discovery Center provides an intuitive "Watchlist Stream" that tracks and displays various watchlists. The Watchlist Stream shows all latest company and contact watchlists that you have created on a weekly basis and you can also change the watchlist settings to follow companies and contacts you are prospecting using the Watchlist tab.

Note: In the Discovery Center, you can research a company and a contact even without adding the company and contact data to Dynamics 365.

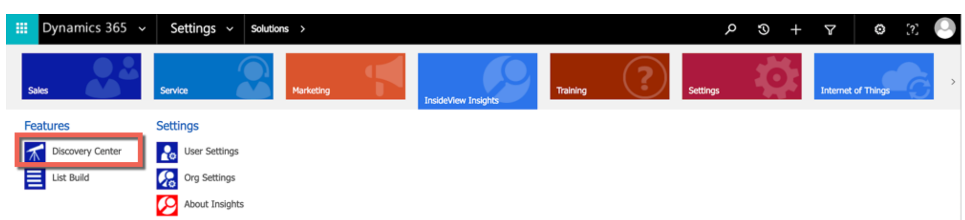
Getting to the Discovery Center

You can launch the Discovery Center from the Dynamics 365 tile menu. The Discovery Center launches a search page where you can enter the company names that you want to find. Here's how:

1. On the navigation bar, click the **Main** button .

2. Go to the **InsideView Insights** work area.

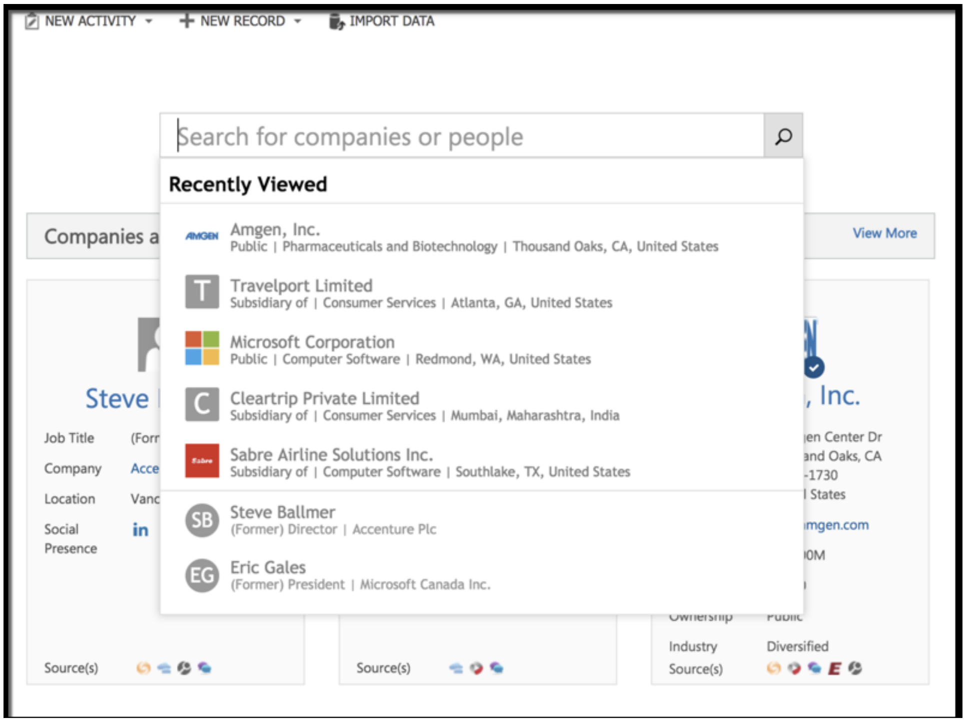
3. Click the **Discovery Center** button.



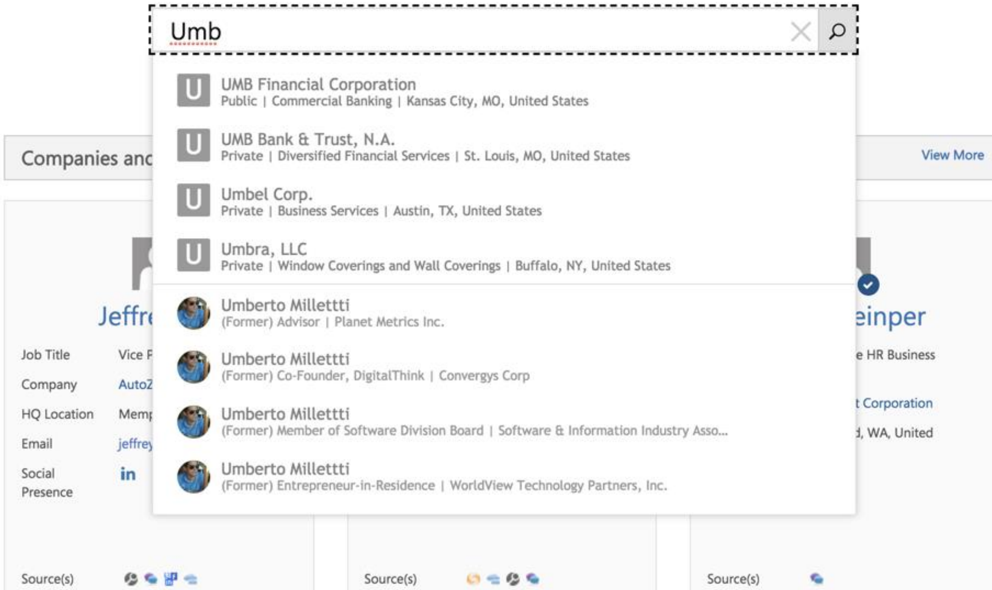
Note: The Org Settings button will be visible only to the Microsoft Dynamics CRM account administrator.

4. In the Discovery Center page, enter the name of the company or the contact that you want search.

If you type **Mic** in the search area, all company and contact that starts with Mic and contains Mic in their names are populated in the list as illustrated.

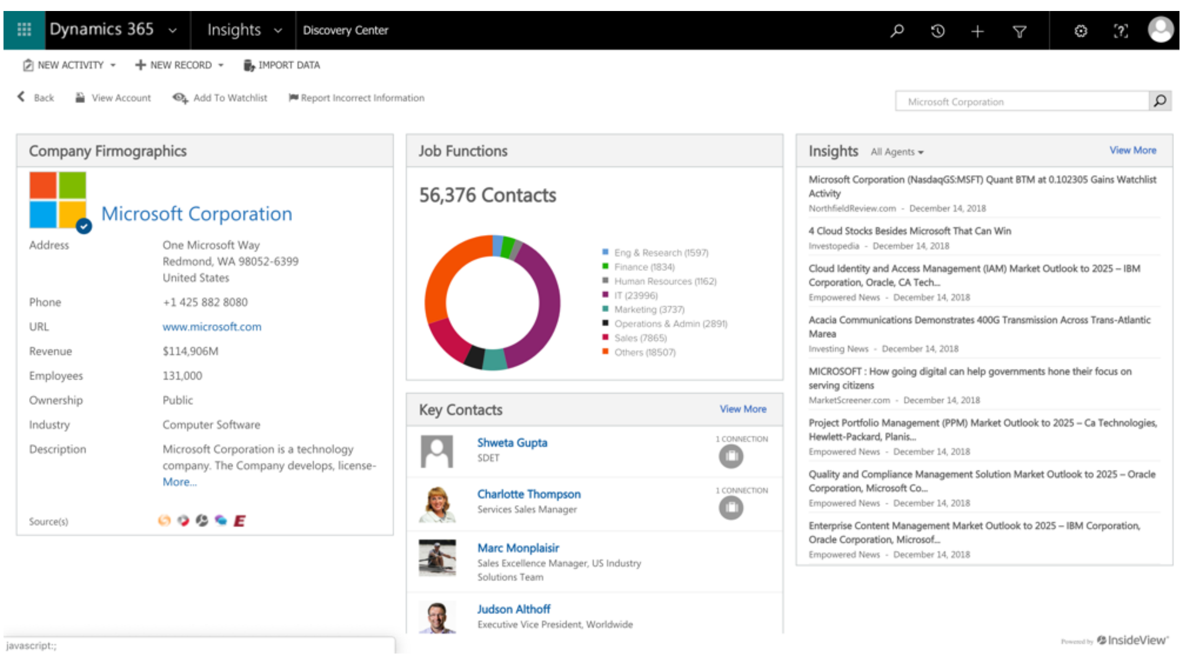


If you type **Umb** in the search area, all companies and contacts that starts with Umb and contains **Umb** in their names are populated in the list as illustrated.



Note: In the search results, you will also see former employees that are indicated with (Former).

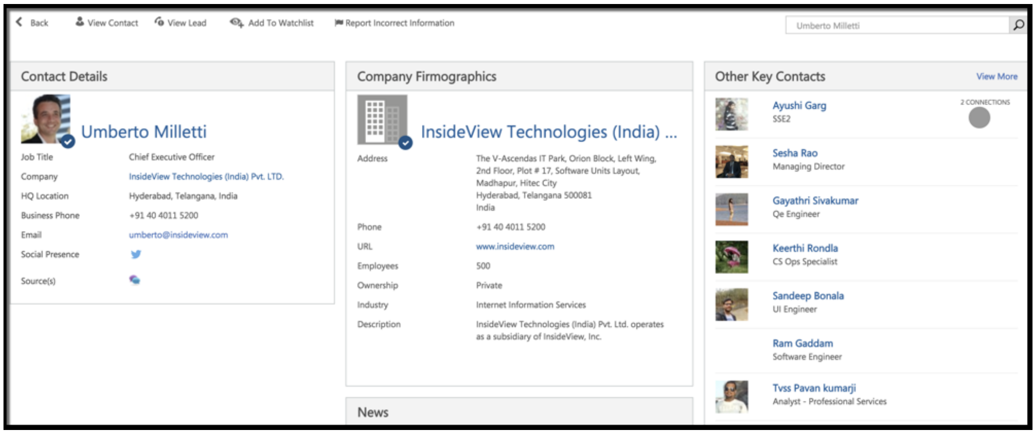
5. Select the desired company to open the Company Details page.



6. The Company Details page shows the Firmographic data, Key Contacts, and Insights (company news) as per your Agents selection.

Note: You can use the Search area at the top of this page to change the company just by entering the name.

7. Select the desired contact to open the Contact Details page.



8. The Contact Details page shows the Contact Details, Company's Firmographic data, Job Functions, Other Key Contacts, and Insights (contact news) as per your Agents selection.

Discovery Center Functions

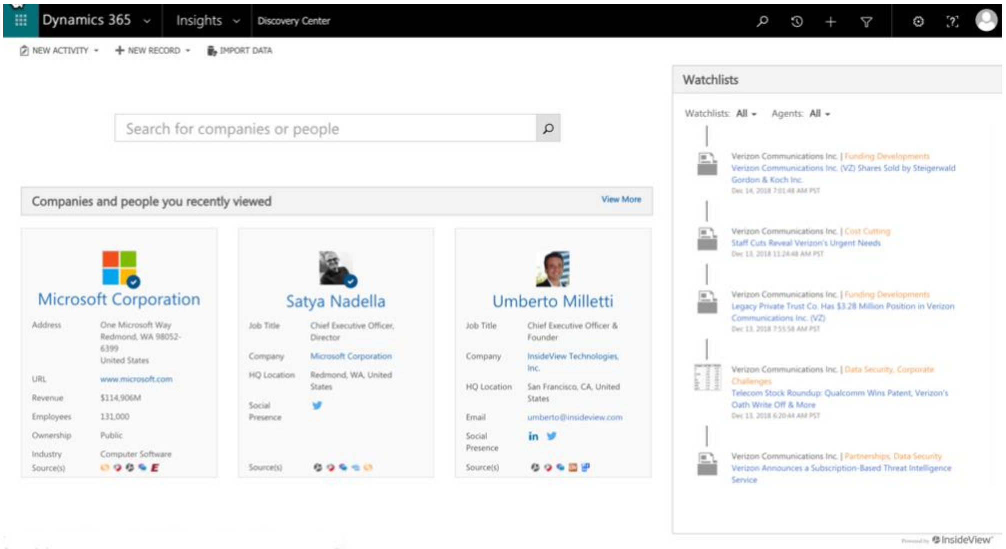
The Discovery Center offers an interactive Company Details and the Contact Details page where you can see the required prospect information that will help you start your business conversations. The Discovery Center lets you do the following:

- Search for the company name
- Add a Missing Company
- Add a Company to a Watchlist
- Add a Company to the CRM
- Report incorrect company information
- Search for the contact
- Add as a Contact to the CRM
- Add Contact as a Lead to the CRM
- Add a Contact to the Watchlist
- Add a Missing Contact
- Report the incorrect contact information
- View top contacts in a company
- View connections for a contact

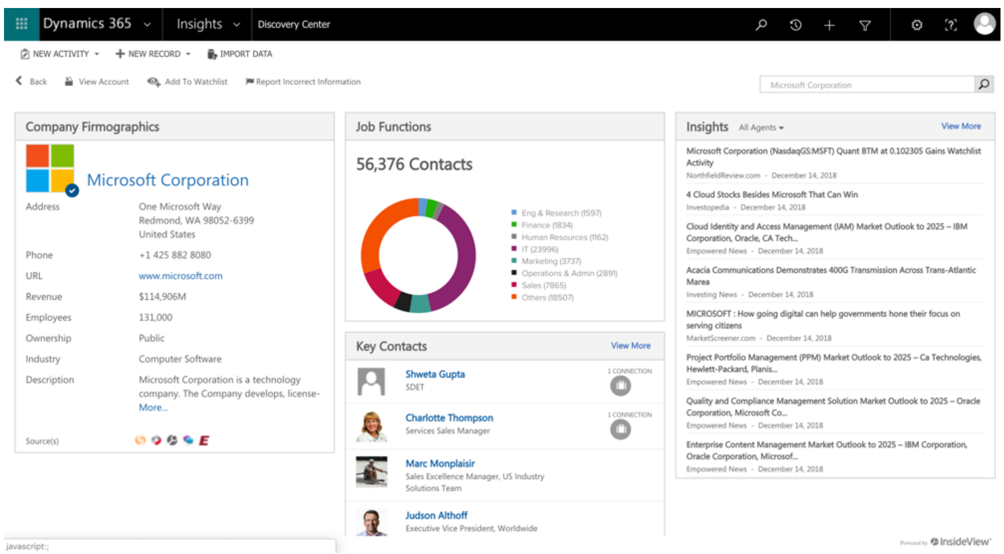
Add a Company

The Discovery Center allows you to add a company account to Dynamics 365 or CRM Online. Here is how:

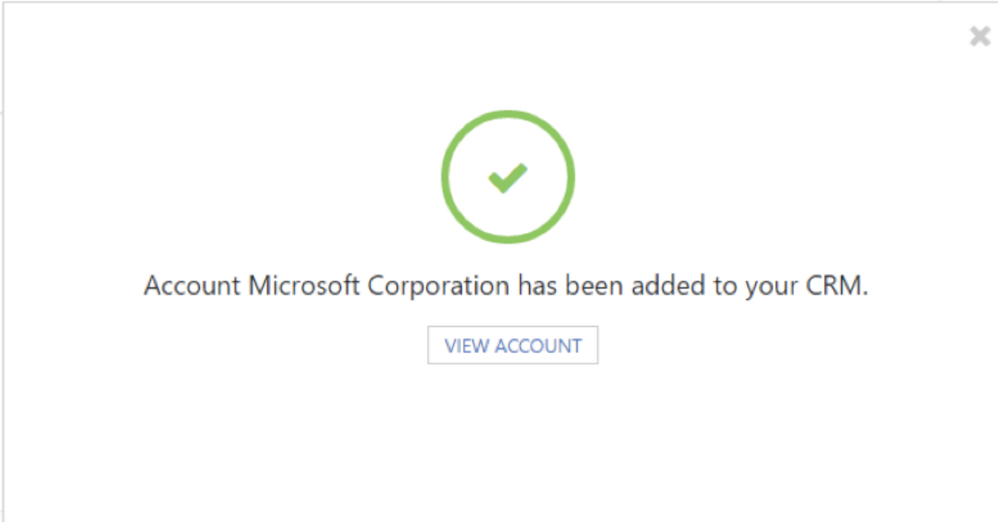
1. Go to the Discovery Center and search for a company. For example, search for Microsoft Corporation.



2. Search for a company that is not in your Dynamics 365 or CRM database.



3. Click the **Add to CRM** button ✚.



4. The company account is added in Dynamics 365 and the **View Account** button appears.

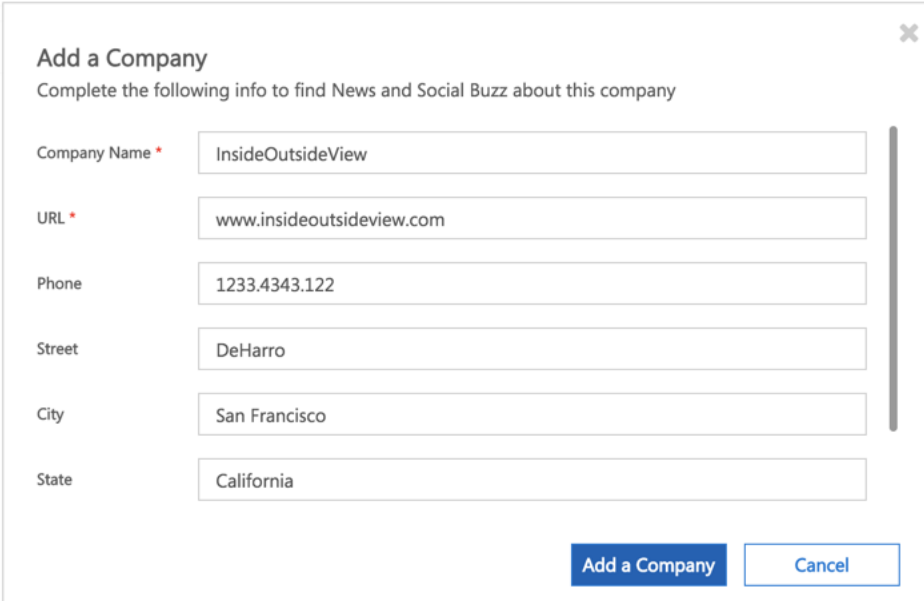
   Note: You can also add a company by clicking the **Add to CRM** button in the search results and the Company Preview pane. Read the Add a Company from Company Preview Pane for more information.

Add a Missing Company

If you don't find a company in the search results for a company in the Discovery Center, you can add that company data in the Insights database. Here's how:

1. Go to the Company Details page, and then click the **Add a Company**  icon.

2. In the Add a Company, enter the company's **name**, **website URL**, **Phone**, **City** and **State** details.



Note: You can also find the **Add a Company** link in the following scenarios:

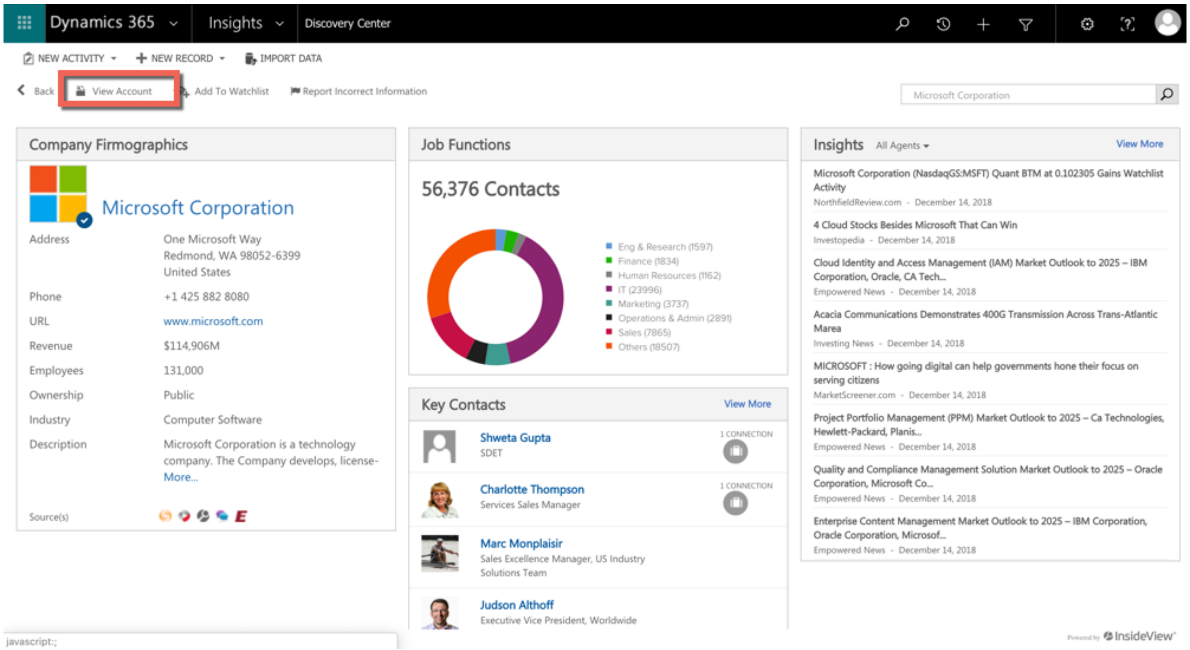
- When zero matches are found for a company
- When you see "did you mean?" in search results
- When no recommendation is available for a company

3. Click the **Add a Company** button.

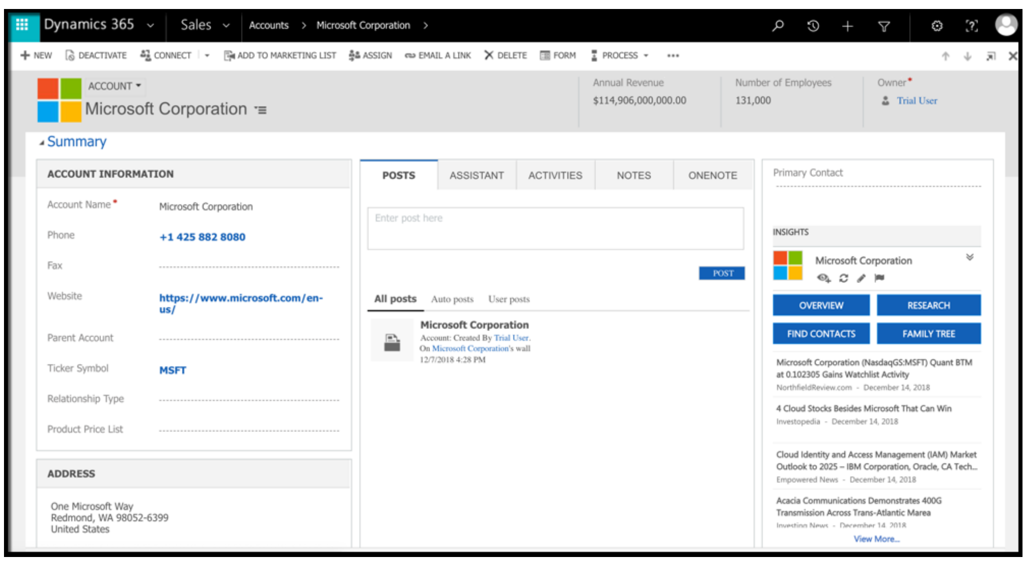
View a Company Account Details

The Discovery Center company details page allows you view account details in Dynamics 365 or CRM Online. Here is how:
Note: The option to click the company link and view company information is available in the Discovery Center’s recently viewed card, Company Details page, Similar Companies and Family Tree CRM View.

1. Go to the Discovery Center and search for a company. For example, Microsoft Corporation.



2. Click the **View Account** button  to open the account details.



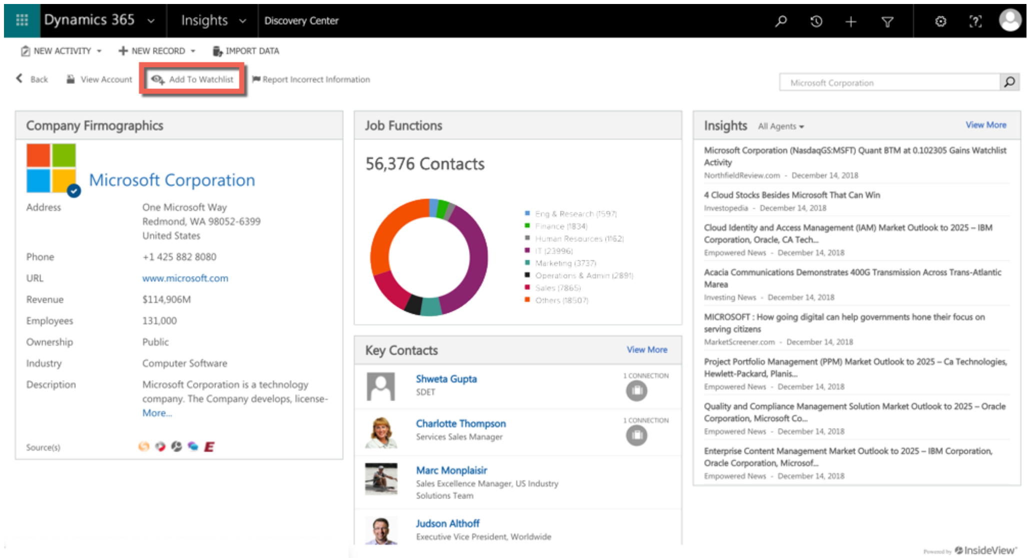
3. You can view account details here or use the company account view to take a deep dive on this company.

Add a Company to your Watchlist

Watchlists send daily or weekly email notifications of the latest news and events for a company you are following.

The Company Details page via the Discovery Center allows you to add a company to your Watchlist. Here's how:

1. Go to the Discovery Center and search for a company.



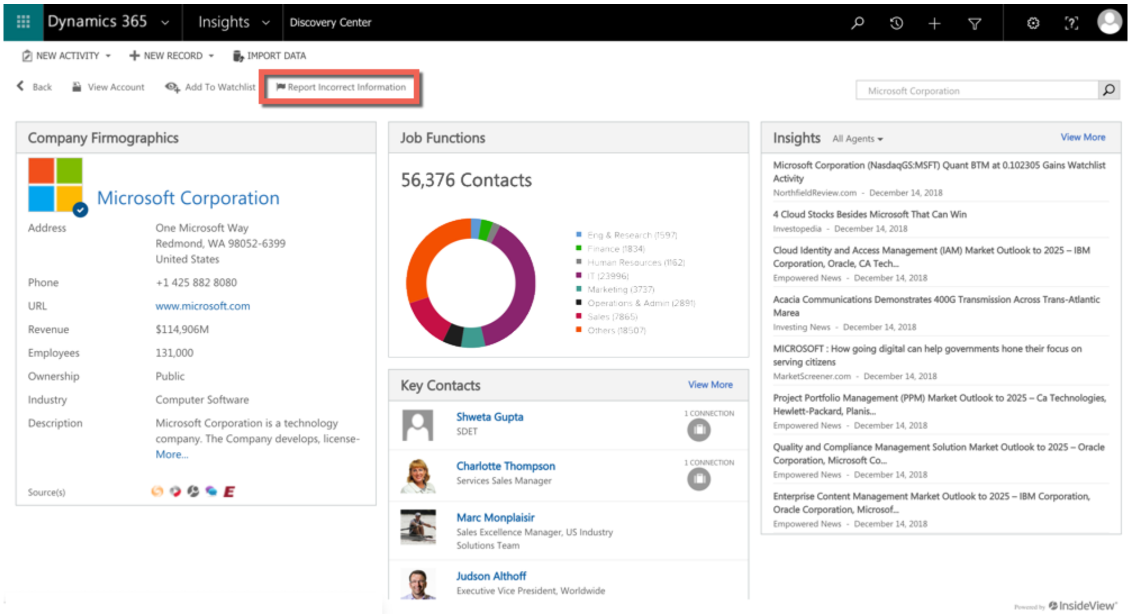
2. Click the **Add to Watchlist** button to add a company to a Watchlist with one-click.

Report incorrect information

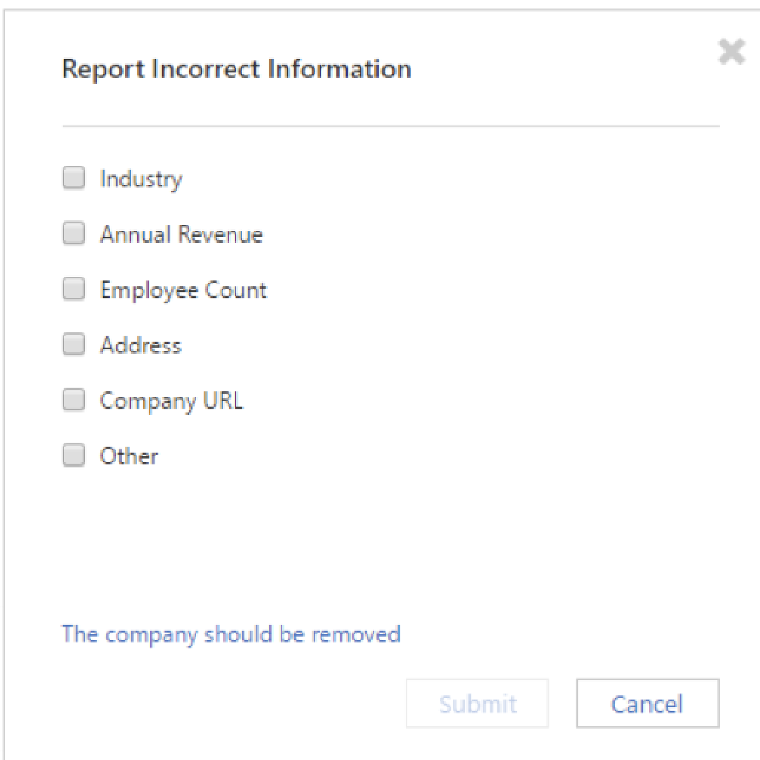
The **Report Incorrect Information** button lets you report company information that you believe is incorrect.

Note: When you report incorrect company information, the data in question is sent to a dedicated content engineering team for careful evaluation and research. If the information in Insights is incorrect, the content team will validate the data and update the information accordingly.

1. Go to the Discovery Center and search for a company.



2. Click the **Report Incorrect Information** button to report incorrect company data.



3. When prompted, provide the reason you believe the company should be removed.

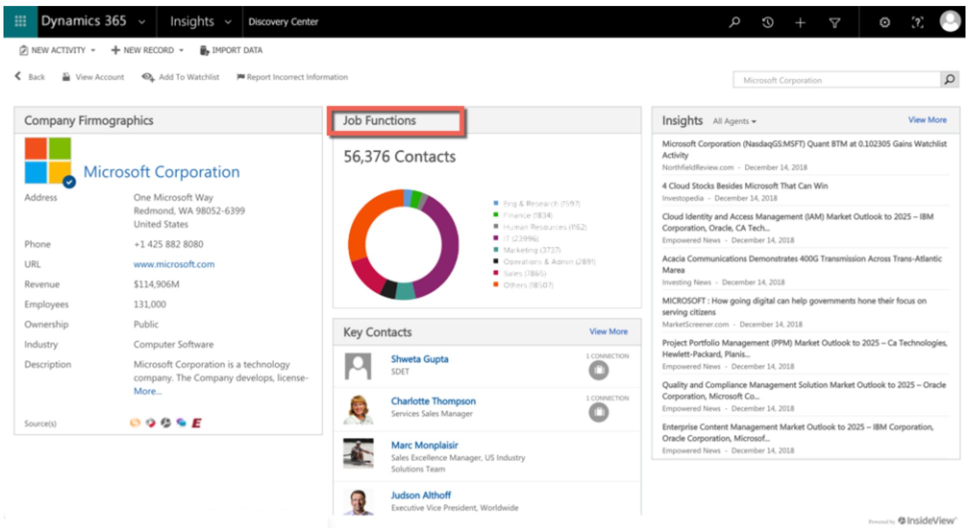
4. If you believe the company should not be displayed, then click **The company should be removed** link.

5. Click **Submit**.

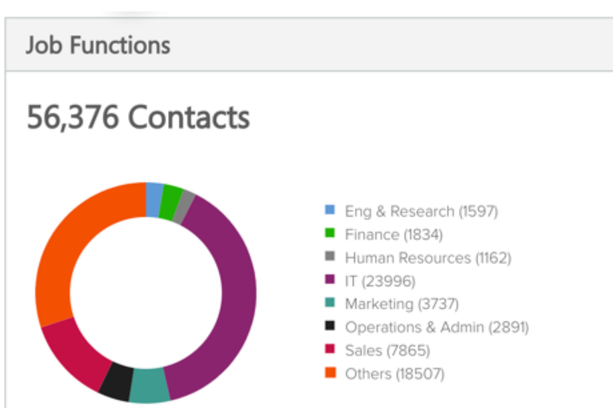
View contacts and their job function

The company details page enables you to view the key contacts and a donut-chart that shows contacts with various job functions. Here's how:

1. Go to the Discovery Center and search for a company. For example, search for Microsoft Corporation.

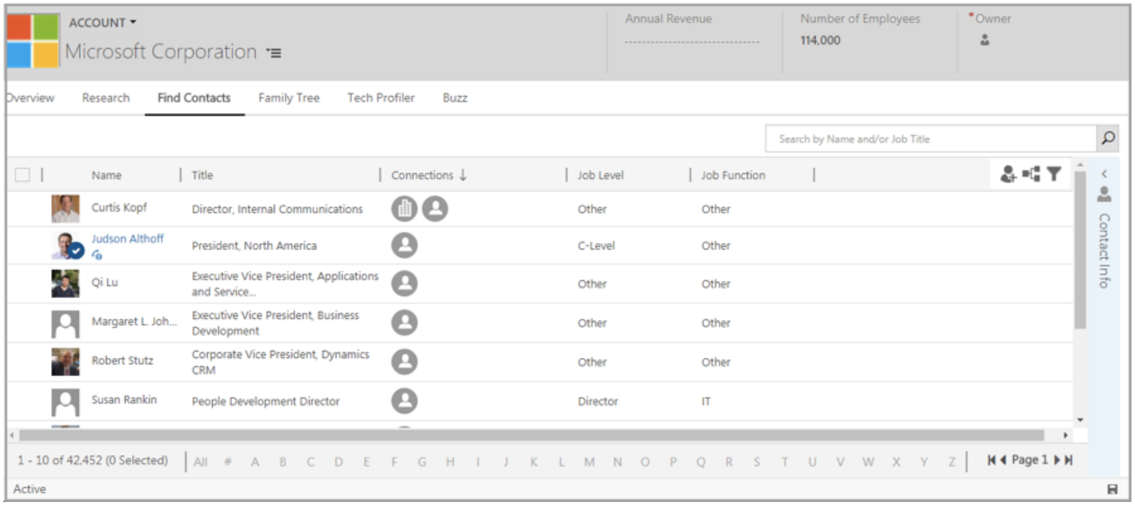


2. Click on the donut-chart to view the total number of contacts with job functions.



3. Scroll down and click the **View More** link to open the Find Contacts page.

   Note: The **View More** link is visible only when the company is added to your Dynamics 365 environment.

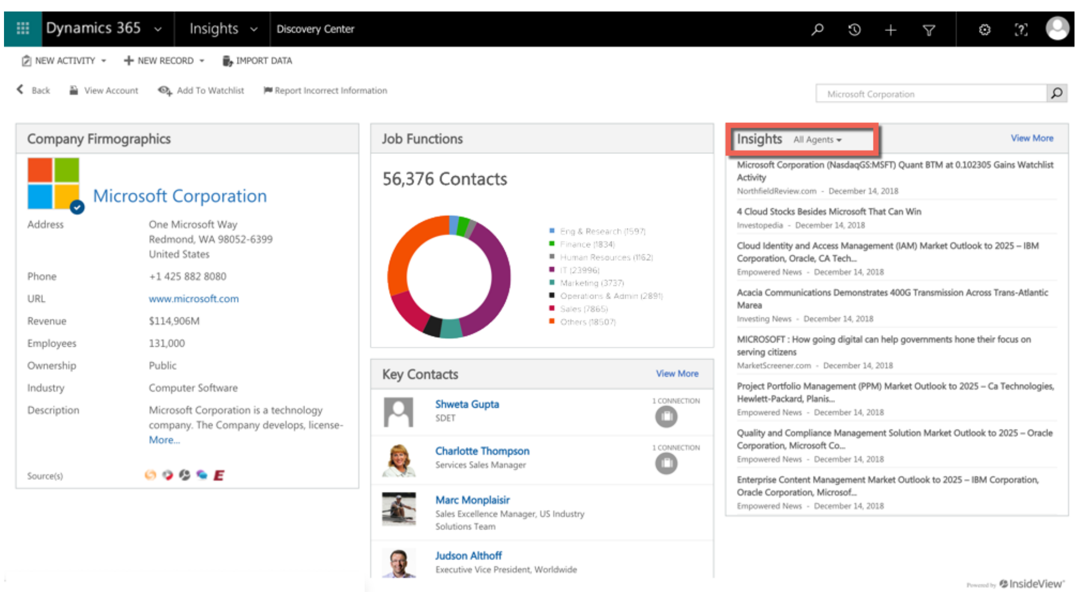


4. Read Chapter 6: Find Contacts for more information.

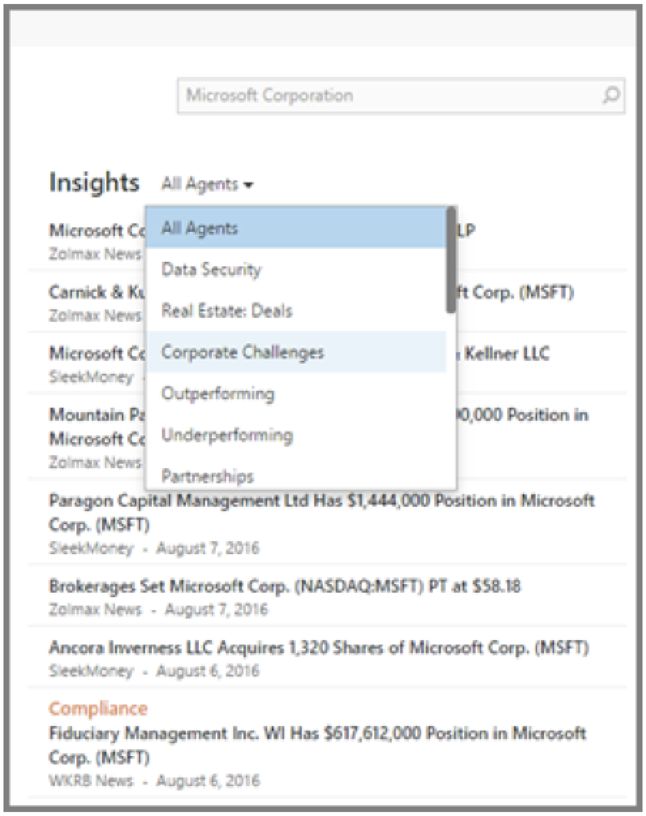
Modify the Agents for Company Insights

InsideView Insights is infused with search agent technology that continuously scans more than 40,000 web, news, and social sources to extract and categorize current events about all of the companies you are interested in. You can modify the agent in the company details to view the relevant news about that particular company. Here's how:

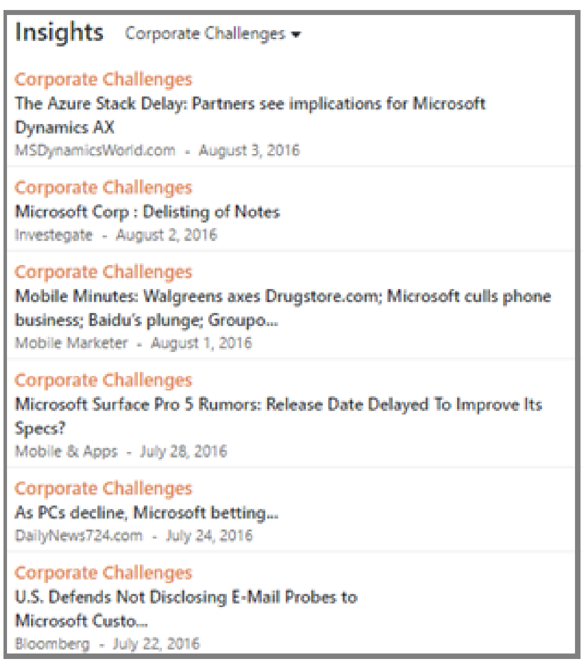
1. Go to the Discovery Center and search for a company. For example, search for Microsoft Corporation.



2. Click **All Agents** and select the desired Agents to view news related to a company.



3. Once you select an Agent, all insights related to that particular selection are displayed.

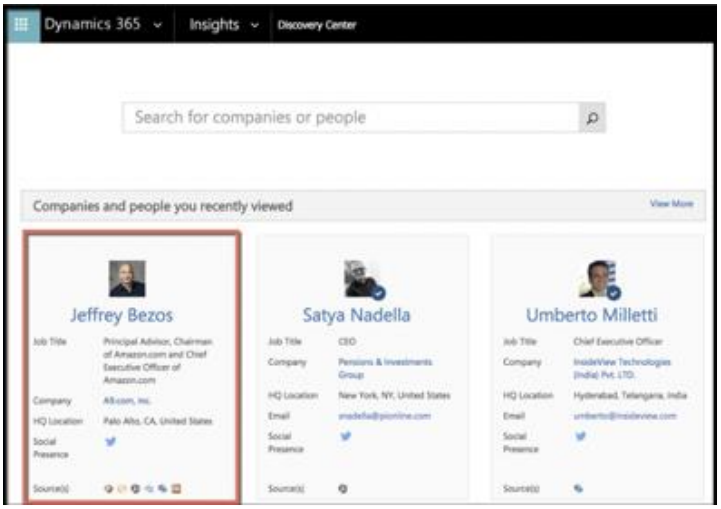


4. Read the Set up you company insights section for more information.

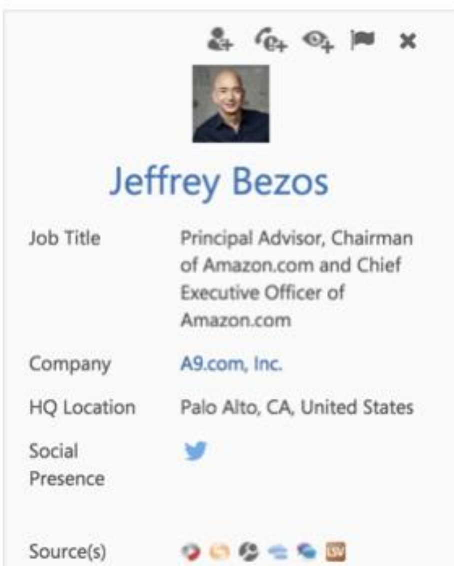
Add as a Contact to the CRM

The Discovery Center allows you to add a contact to Dynamics 365 or CRM Online. Here is how:

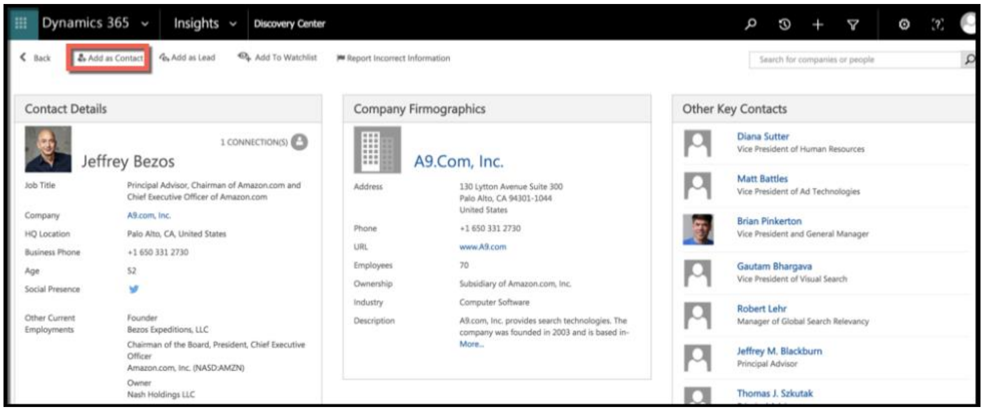
1. Go to the Discovery Center and search for a contact. For example, search for Jeff Bezos.



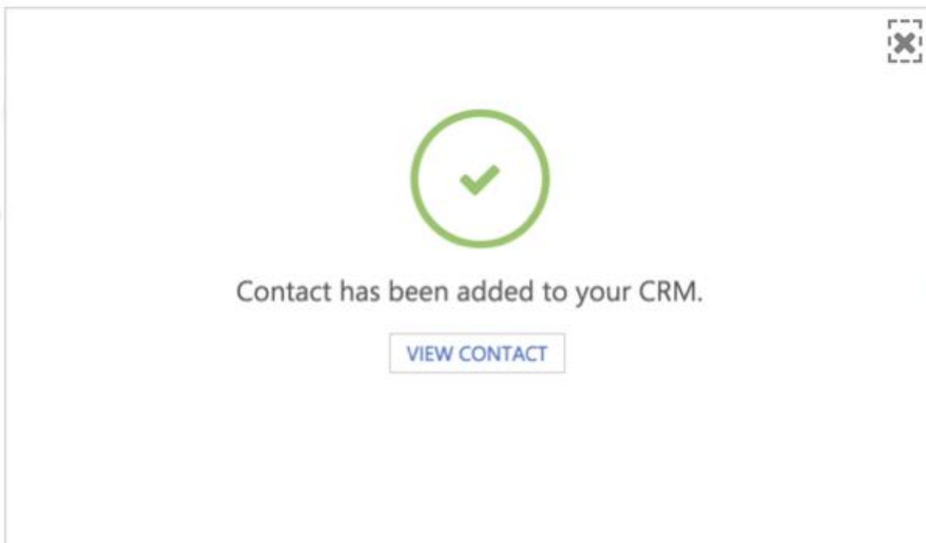
2. Search for a contact that is not in your Dynamics 365 or CRM database.



3. Click the **Add as Contact** button .



4. The contact is added in Dynamics 365 and the **View Contact** button appears.

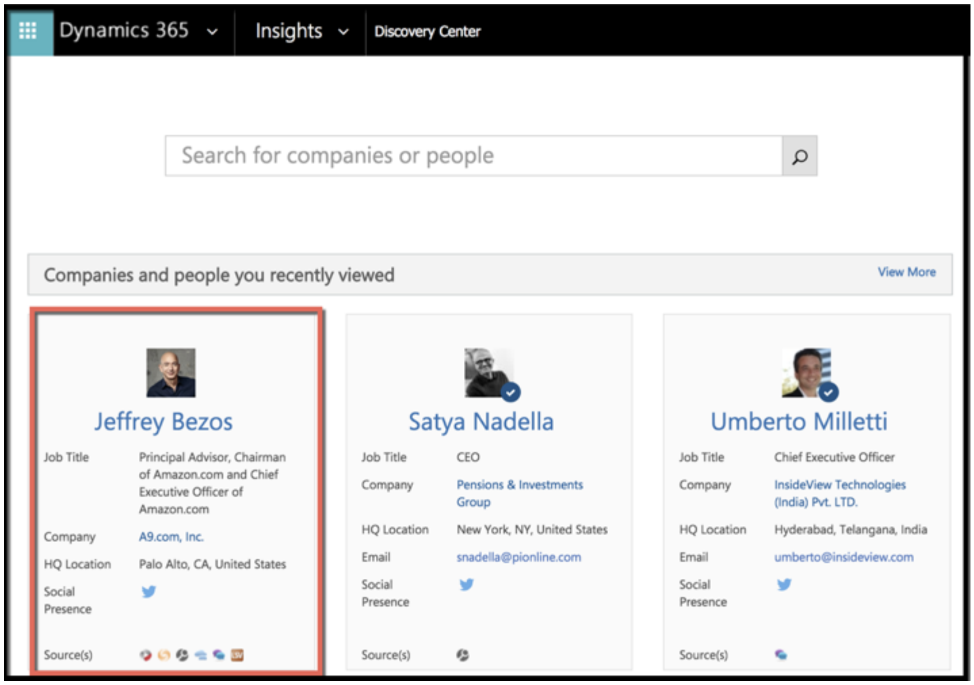


Note: You can also add a contact by clicking the **Add as Contact** button in the search results and the Contact Preview pane. Read the [Add a Contact from Contact Preview Pane] for more information.

Add Contact as a Lead to the CRM

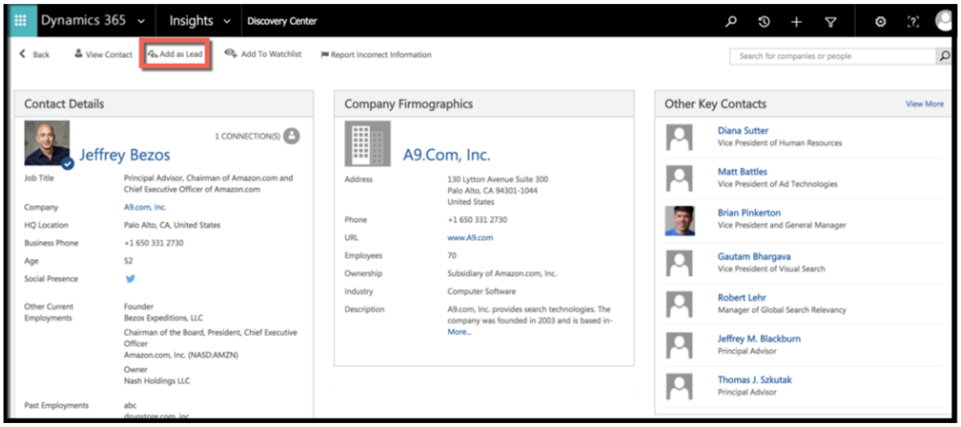
The Discovery Center allows you to add a contact as lead to Dynamics 365 or CRM Online. Here is how:

1. Go to the Discovery Center and search for a contact. For example, search for Jeff Bezos.

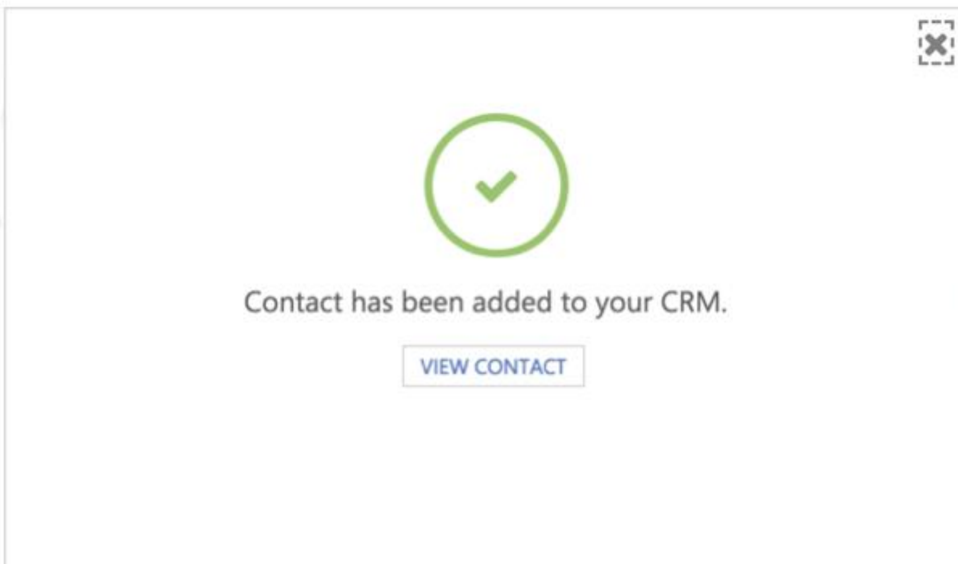


2. Search for a contact that is not added as lead in your Dynamics 365 or CRM database.

3. Click the **Add as Lead** button .



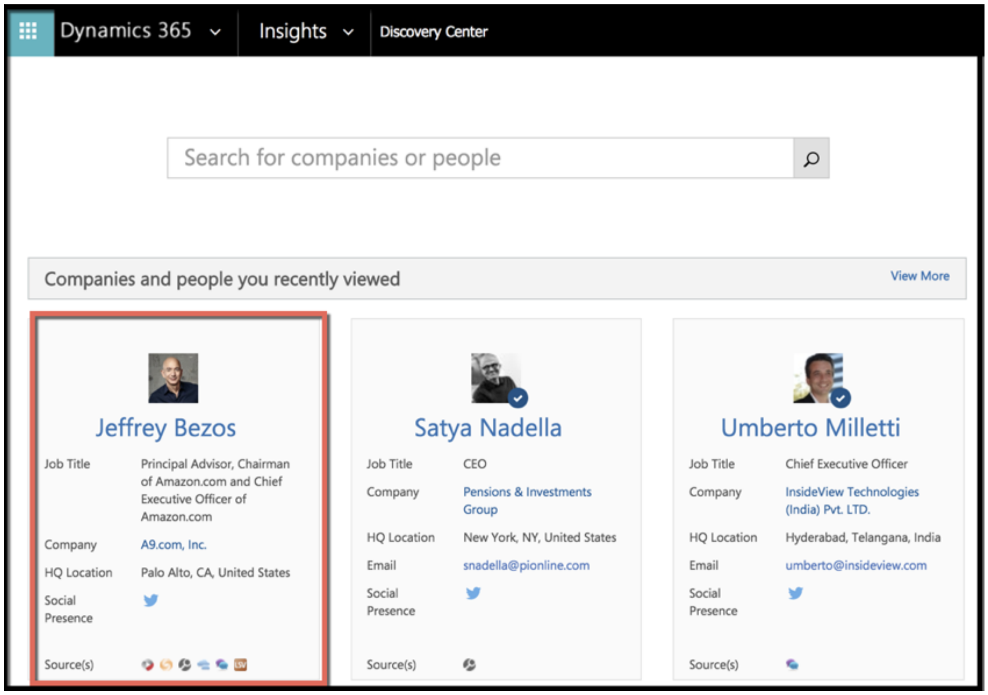
4. The contact is added as lead in Dynamics 365 and the **View Contact** button appears.



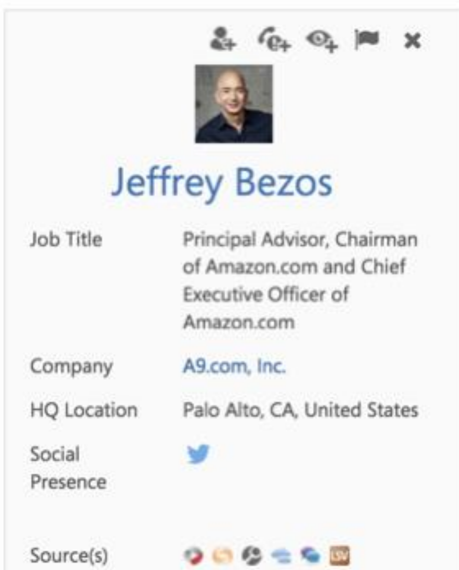
Add Contact to the Watchlist

The Discovery Center allows you to add a contact to the Watchlist to follow executive for business conversations. Here is how:

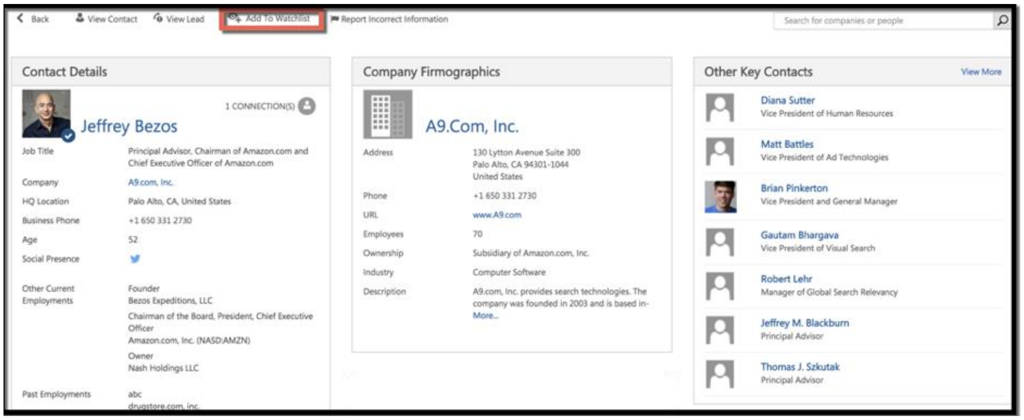
1. Go to the Discovery Center and search for a contact. For example, search for Jeff Bezos.



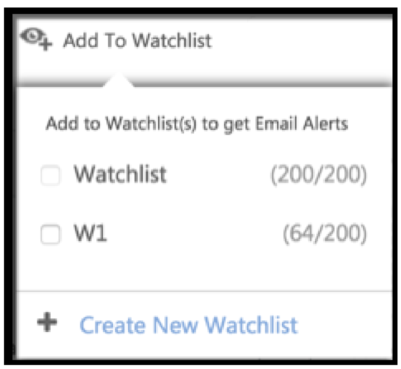
2. Search for a contact that is not added to the Watchlist.



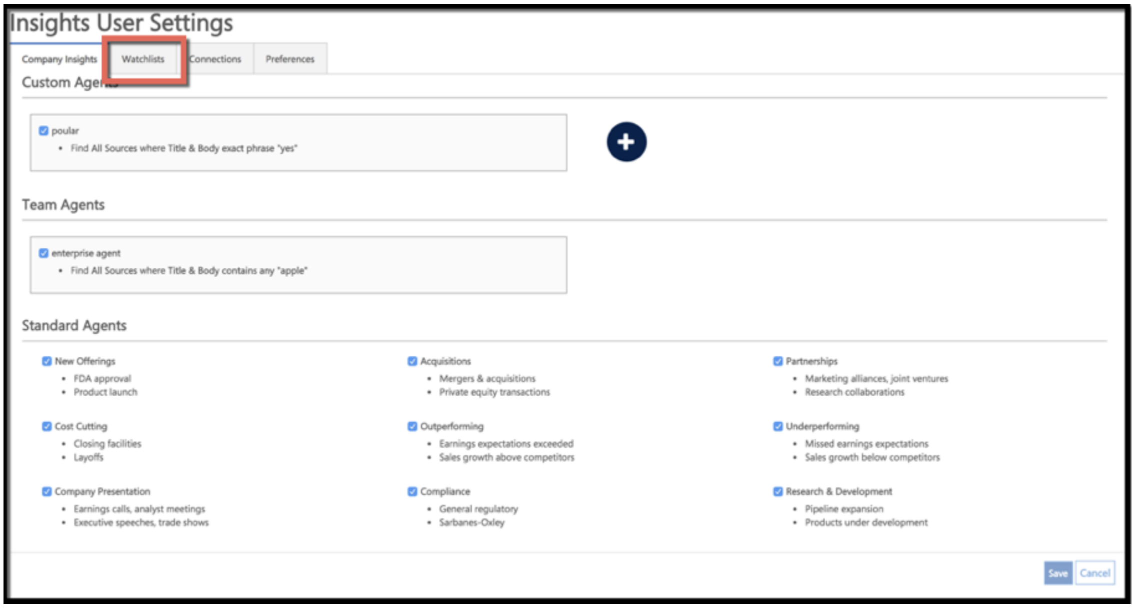
3. Click the **Add To Watchlist** button .



4. To add a contact to watchlist, you can select either an existing watchlist(s) or click the **Create New Watchlist** link.



5. When you select the existing Watchlist, the contact is added to that watchlist.
6. When you click the **Create New Watchlist** link, you will be re-directed to Insights User Settings page where can create a new watchlist.



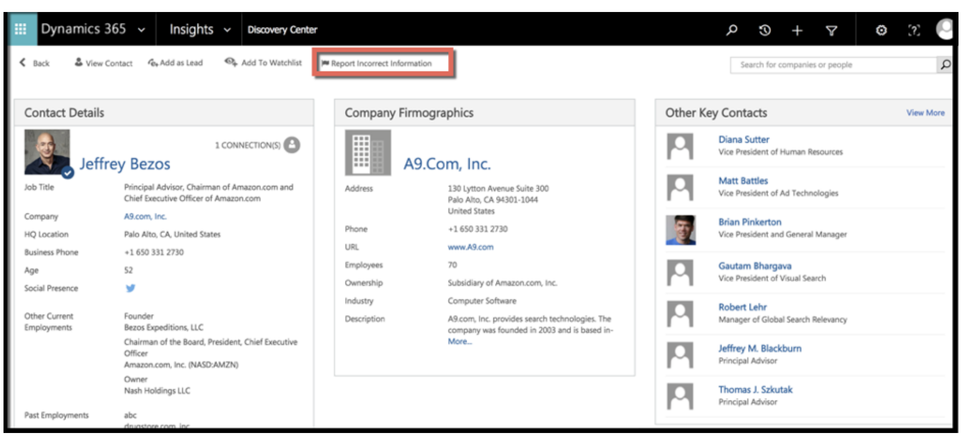
To learn more about watchlist, read the [Manage Your Watchlist] section in the guide.

Report incorrect information

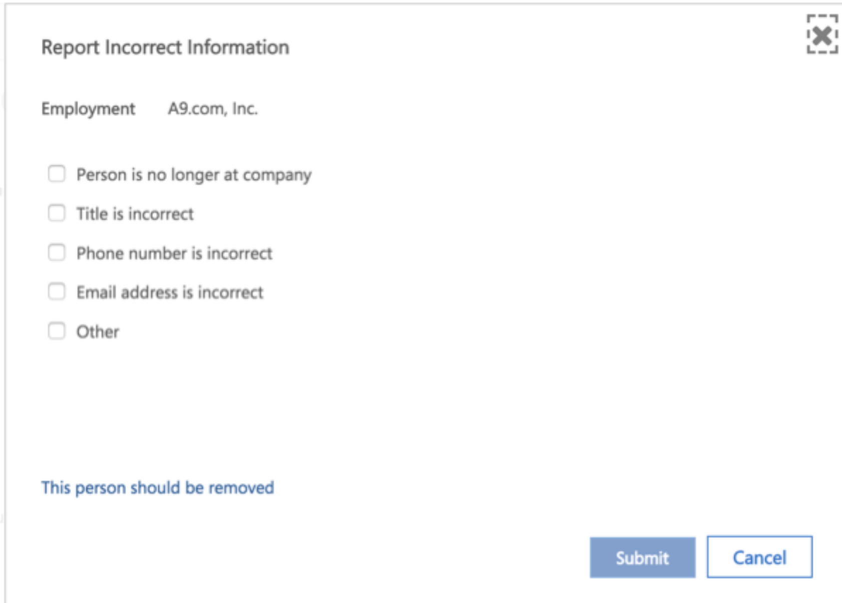
The **Report Incorrect Information** button lets you report contact information that you believe is incorrect.

Note: When you report incorrect contact information, the data in question is sent to a dedicated content engineering team for careful evaluation and research. If the information in Insights is incorrect, the content team will validate the data and update the information accordingly.

1. Go to the Discovery Center and search for a contact.



2. Click the **Report Incorrect Information** button to report incorrect contact data.



3. When prompted, provide the reason you believe the company should be removed.

4. If you believe the company should not be displayed, then click **The person should be removed** link.

5. Click **Submit**.

Using Company Preview Pane

You can launch the Company Preview pane using the search option when you enter the name of the company that you are looking for. You can also select the right company from multiple matches found in Insights using additional details.
The Company Preview pane shows you the firmographic data about a company and lets you do any of these things:

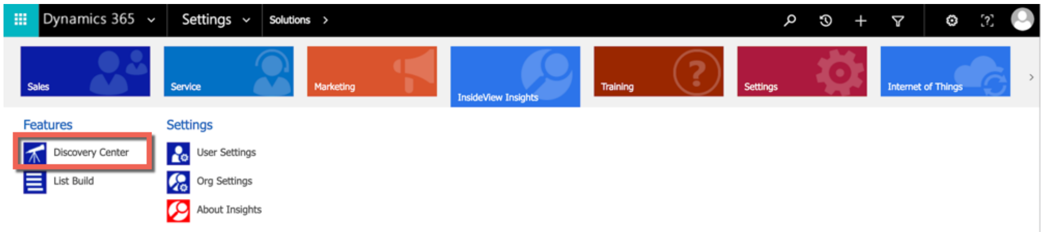
- View the company information, including corporate address, and phone number, as well as revenue and number of employees.
- Add a company to your Dynamics 365 environment.
- Add a company to your Watchlist.
- Add multiple companies to Dynamics 365 environment and your Watchlist.

Here’s how:

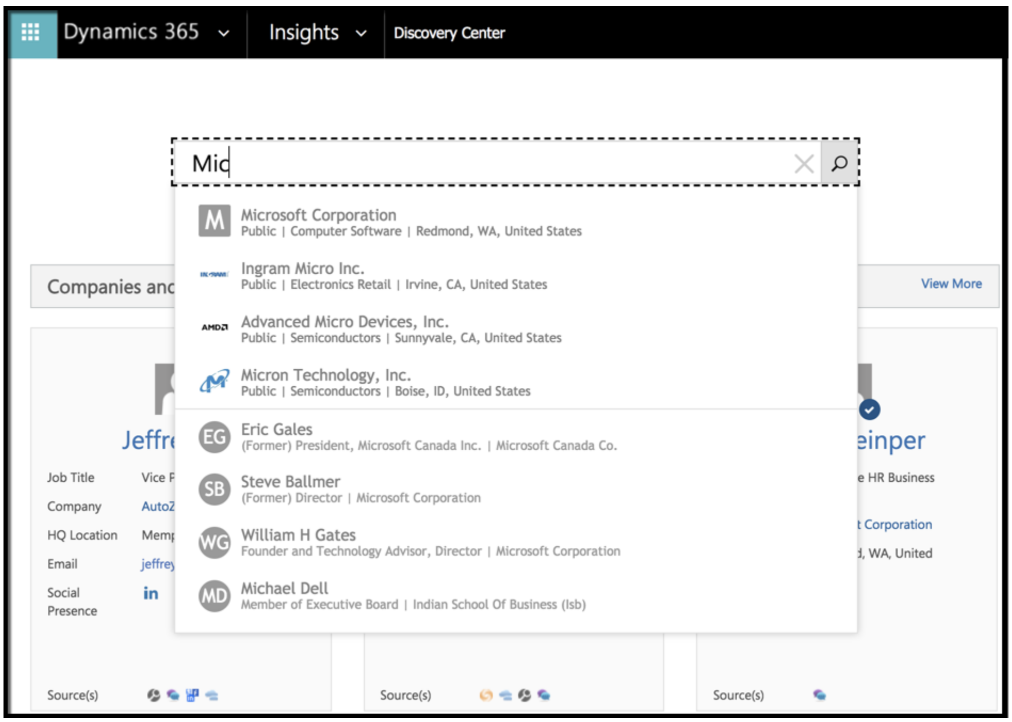
1. On the navigation bar, click the **Main** button .

2. Go to the **InsideView Insights** work area.

3. Click the **Discovery Center** button.

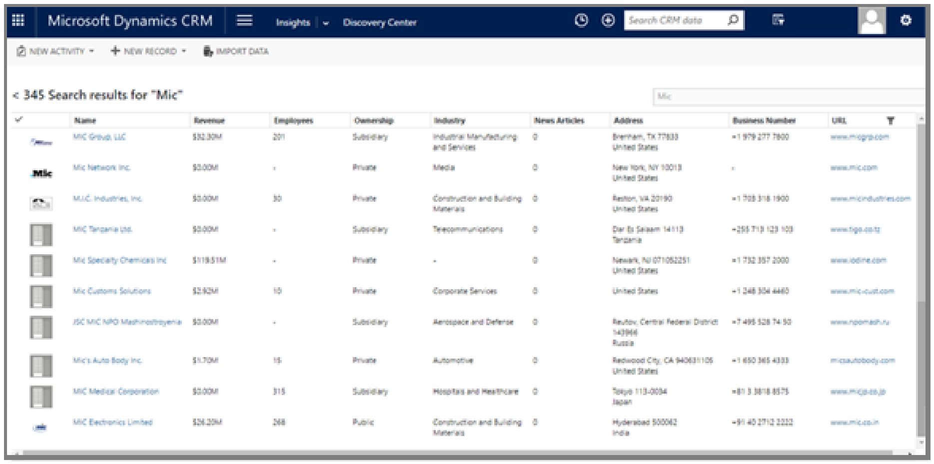


4. In the Discovery Center page, enter few letters of the company name that you want search for.



For example, if you type **Mic** in the search area, all companies and contacts that starts with Mic and contains Mic in their names are populated in the list as illustrated above.

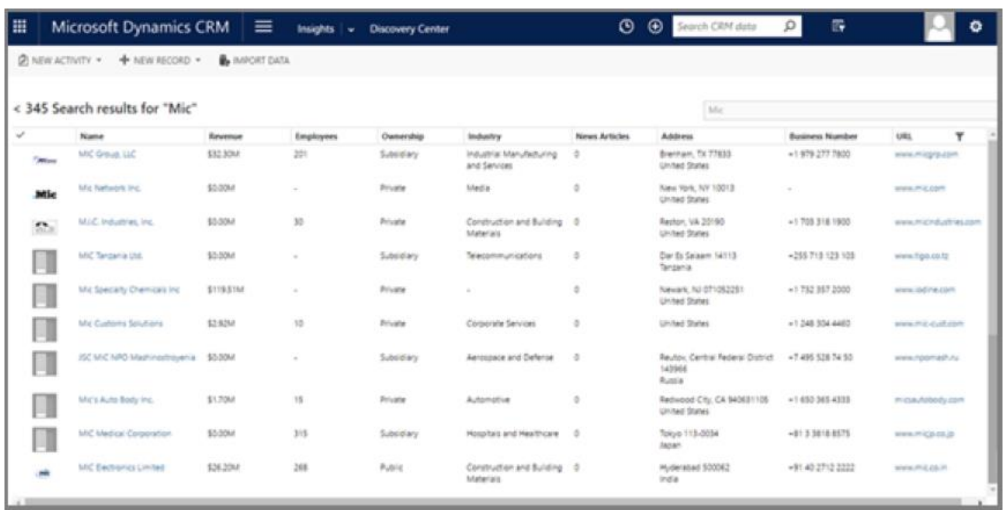
5. Click the **Search** button to launch the Company Preview pane.



View the company information

You can view the company firmographic data in the Company preview pane. Here's how:

1. Go to the Company Preview pane.



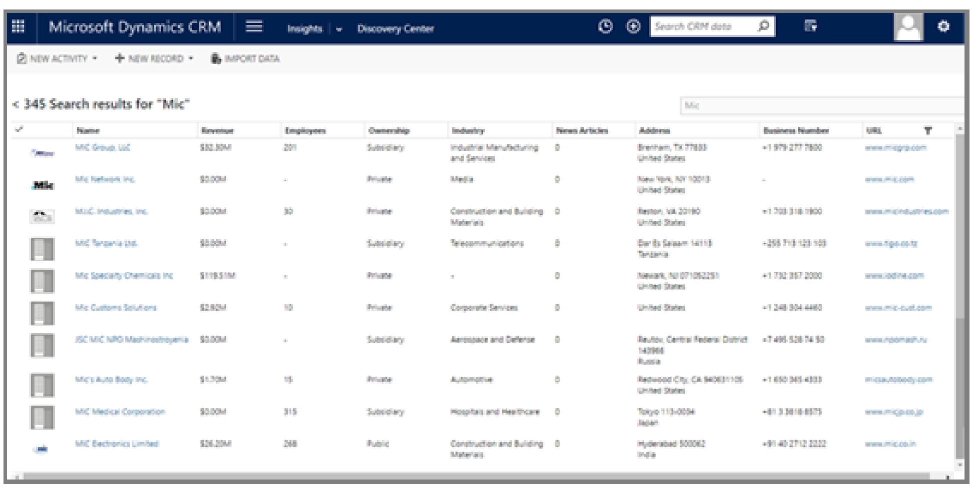
2. When you select a company, the firmographic data is populated in the right pane.

3. Click the **Remove X** button to close the firmographic pane.

Add a Company from the Company Preview Pane

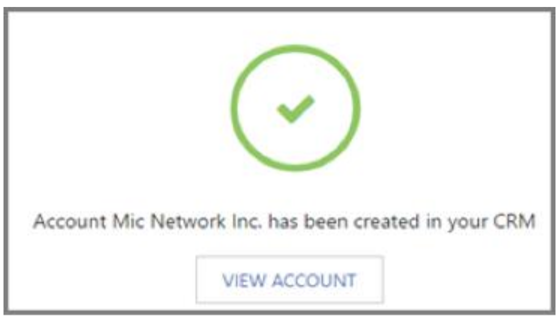
The Company Preview pane allows you to add a company to your Dynamics 365 environment. Here's how:

1. Go to the Company Preview pane.



2. To add a company, select the desired company and click the **Add to CRM** button .

3. The company is added to Dynamics 365 environment and you will see the **View Account** button.

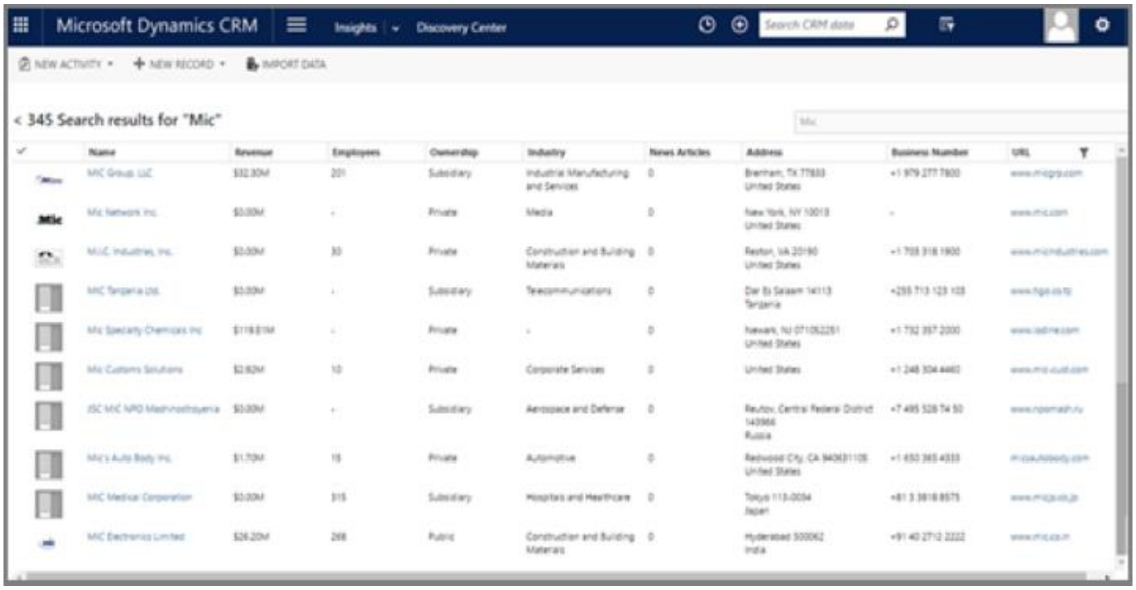


4. To view the company details, click **View Account**.

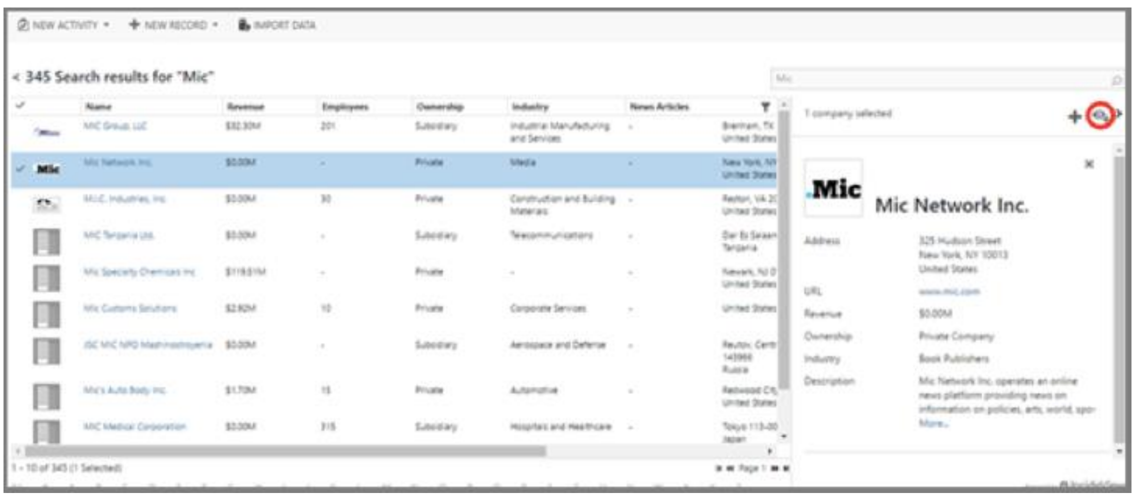
Add a Company to a Watchlist

The Preview pane allows you to add a company to your Insights Watchlist. Here's how:

1. Go to the Company Preview pane.



2. To add a company to Watchlist select the desired company and click the **Add to Watchlist** button .



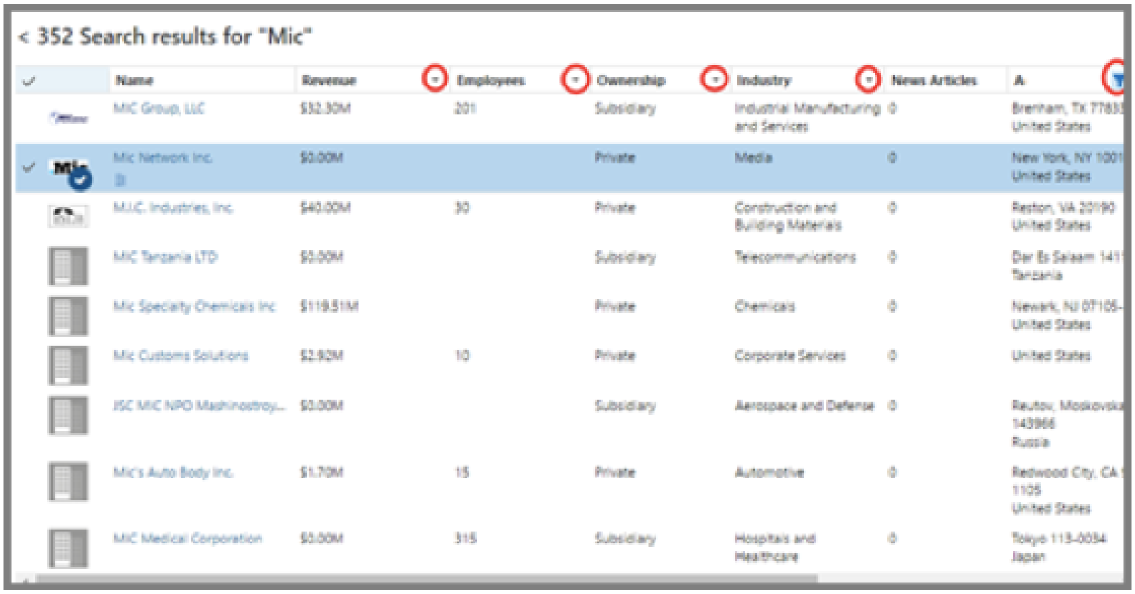
3. The company is added to your Watchlist.

Filter Companies

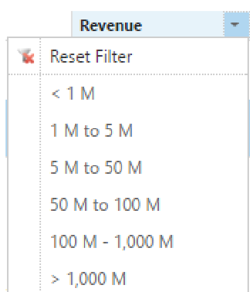
In the Company Preview pane, you can also narrow down your search, using various filters. Here's how:

1. Go to the Company Preview pane, and then click the **Filter** button to see a filtering options.

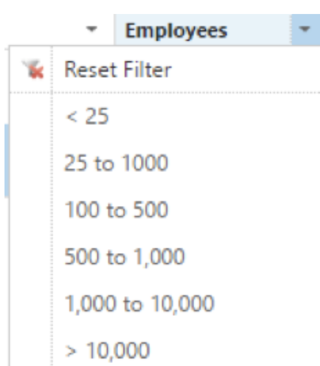
2. The Filtering Options become visible and button changes to blue color .



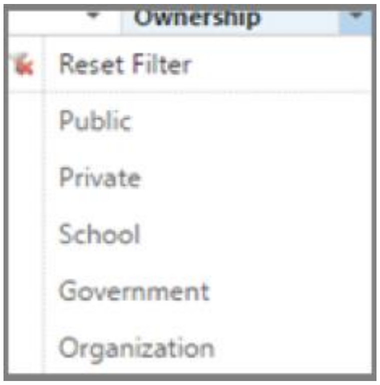
3. You can use the following options to filter your search for a company:
   - **Revenue**: select a revenue range



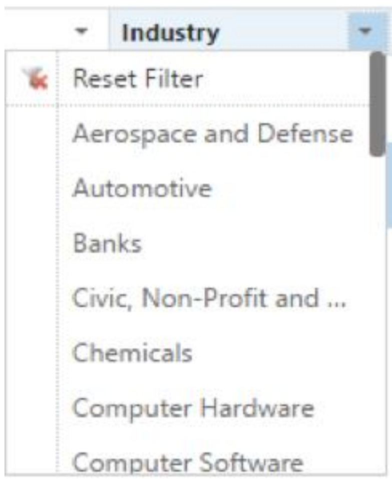
   - **Employees**: Select a range for number of employees.



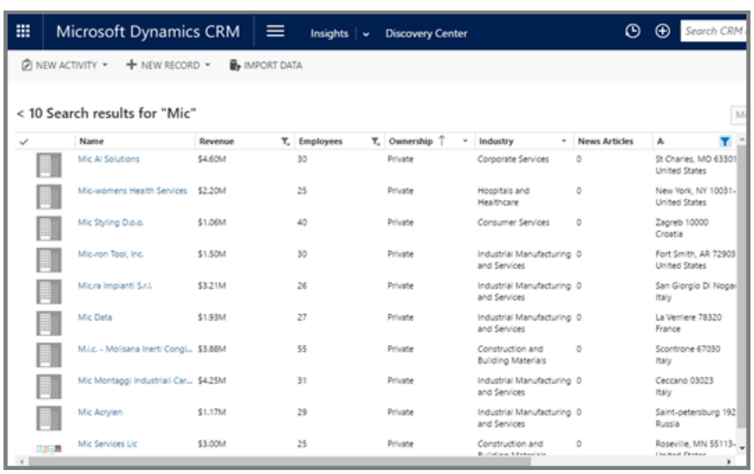
   - **Ownership Type**: select a company ownership type.



- **Industry Type**—scroll to select an industry from a list of 30 industries.



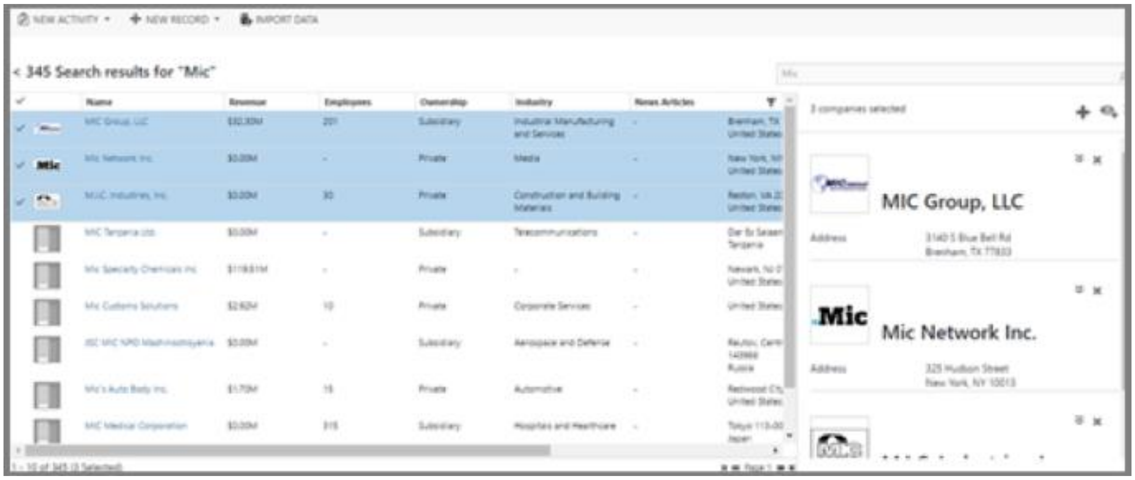
4. The company results will change dynamically as per your selection of filters.



Add Multiple Companies

You can add multiple companies to Dynamics 365 environment, and add them to Watchlists from the Company Preview pane. Here's how:

1. Go to the Company Preview pane, and then select the check box for multiple companies.



2. Complete any of these activities for the selected companies:
   - To view firmographic data, click the **Show Firmographics** button .
   - To add companies to your Dynamics 365 environment, click the **Add to CRM** button .
   - To add companies to your Watchlists, click the **Add to Watchlist** button .
   - To deselect companies selection, click the **Remove X** button**.**

Using Contact/People Preview Pane

You can launch the Contact Preview pane using the search option when you enter the name of the contact that you are looking for. You can also select the right company from multiple matches found in Insights using additional details.

The Contact Preview pane shows you the firmographic data about a contact and lets you do any of these things:

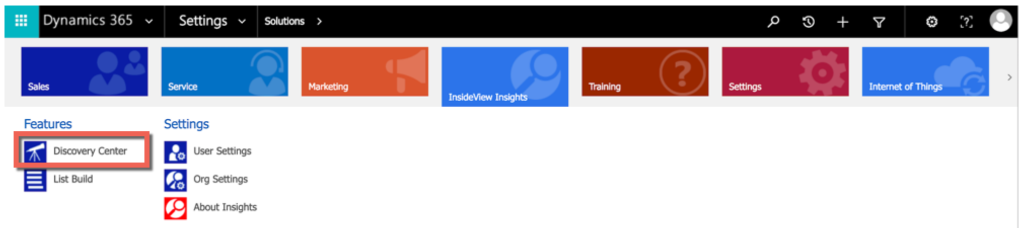
- View the contact information, including job title, company address, and business phone number, as well as social profile and past employment details.
- Add a contact to your Dynamics 365 environment.
- Add a contact to your Watchlist.
- Add multiple contact to Dynamics 365 environment and your Watchlist.

Here's how:

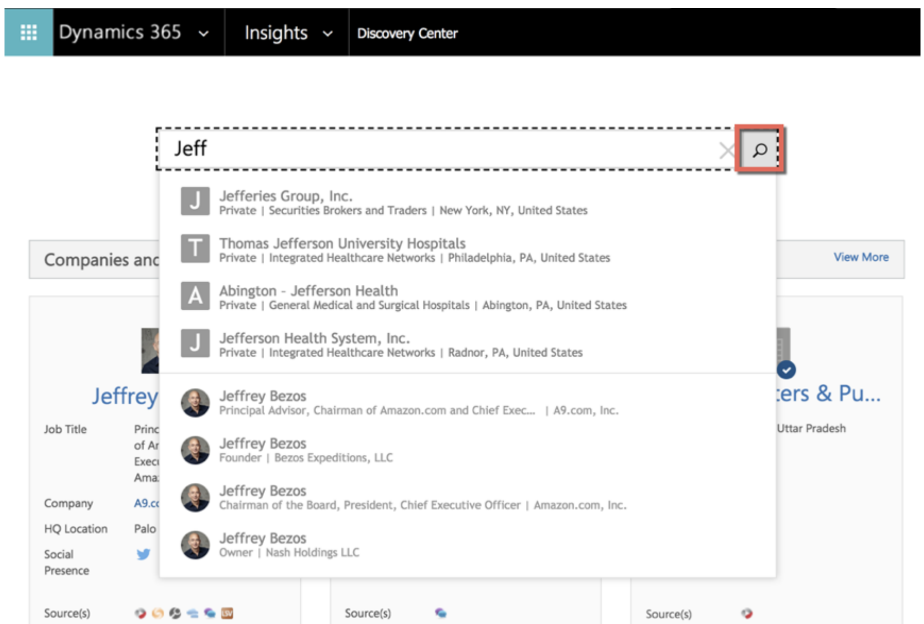
1. On the navigation bar, click the **Main** button .

2. Go to the **InsideView Insights** work area.

3. Click the **Discovery Center** button.

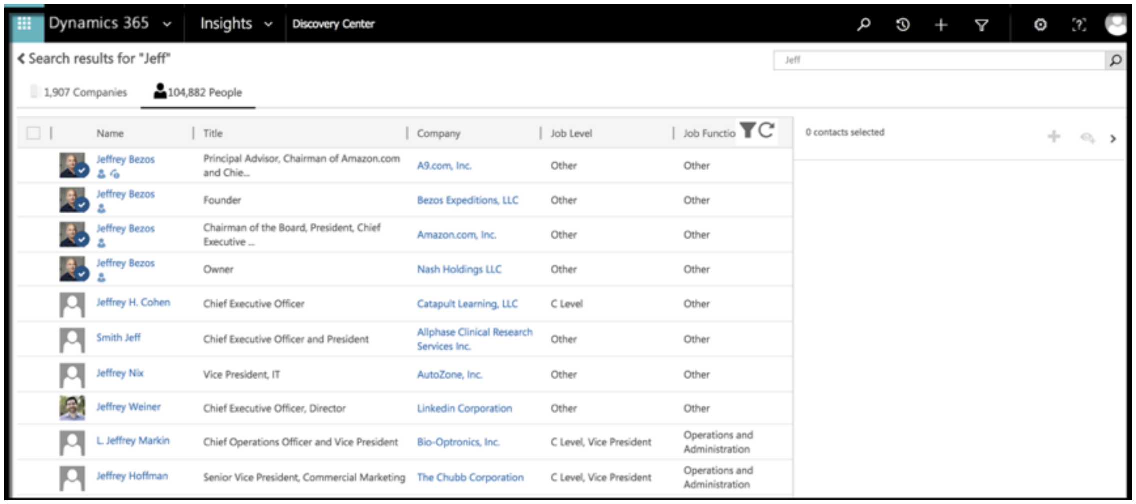


4. In the Discovery Center page, enter few letters of the contact name that you want search for.



For example, if you type **Jeff** in the search area, all company that starts with Jeff and contains Jeff in their names are populated in the list as illustrated above.

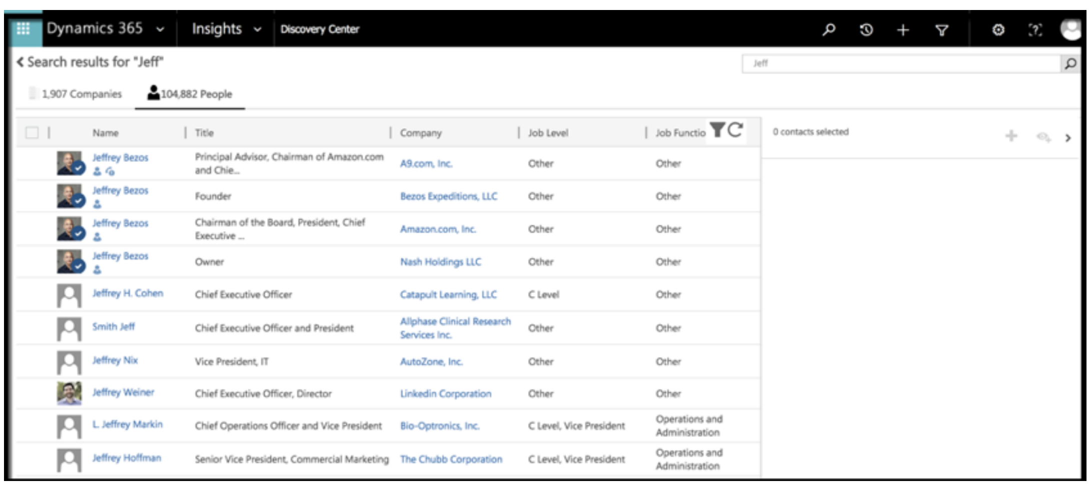
5. Click the **Search** button  and select the **People** tab to launch the Contact Preview pane.



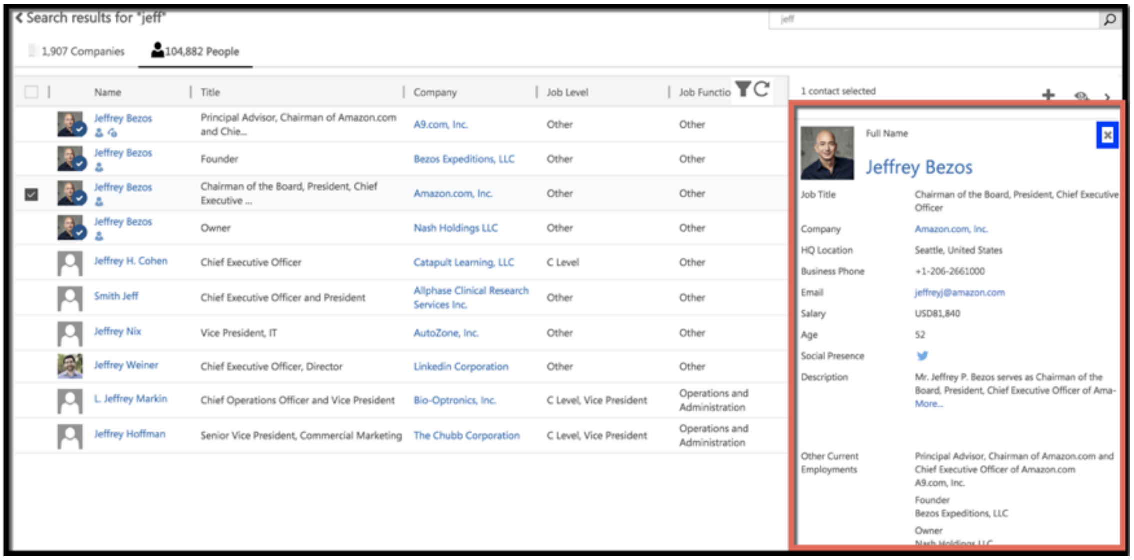
View the contact information

You can view the company firmographic data in the Contact preview pane. Here’s how:

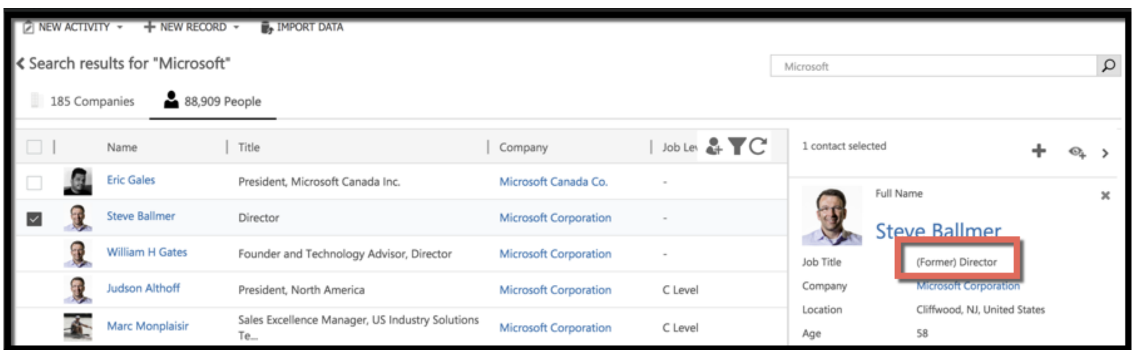
1. Go to the Contact Preview pane.



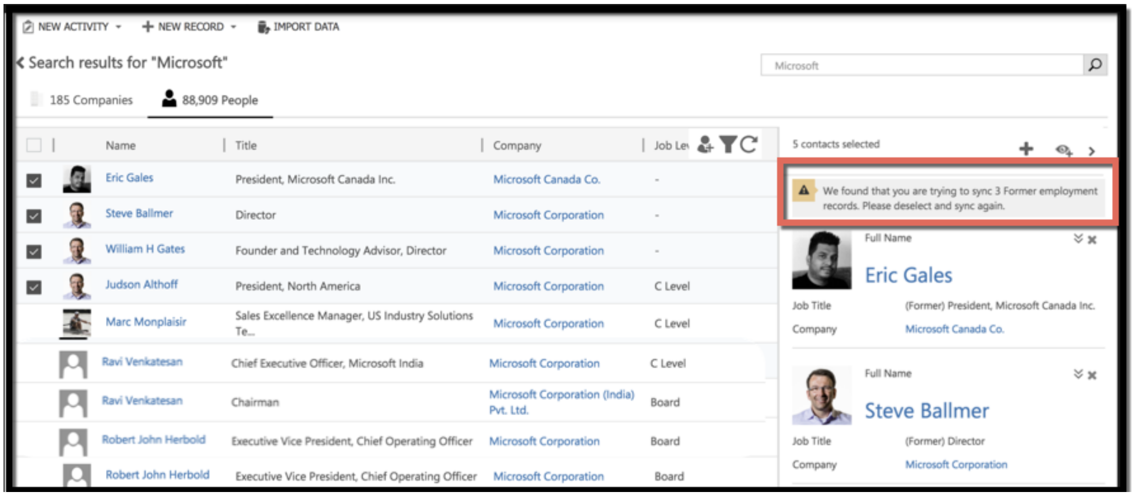
2. When you select a contact, the firmographic data is populated in the right pane.



Note: In the search results, you will also see former executives that are indicated as (Former) in the Summary Panel. You cannot add these former executives as contacts or leads in the CRM.



You cannot sync a mix of current and former executives to the CRM. The following error message appears if you sync former executives.



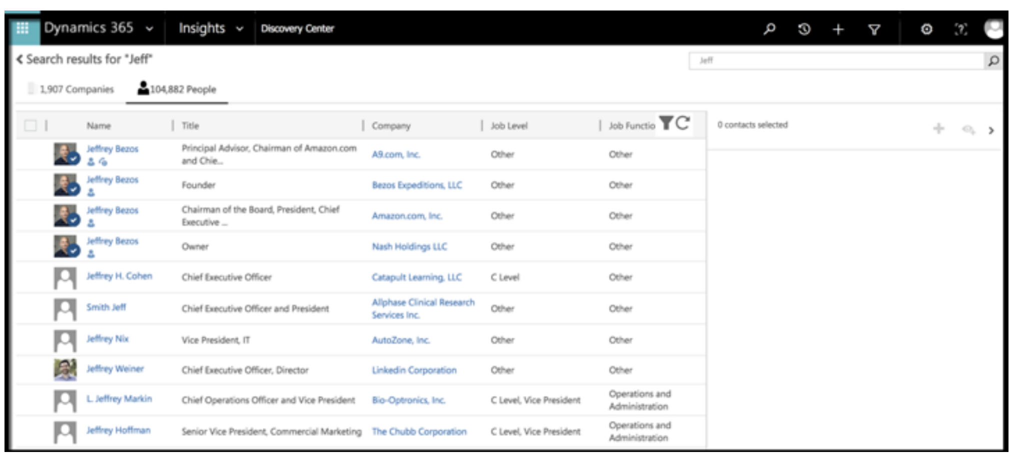
However, you can add a former executive to a watchlist. Refer to section below for more information.

3. Click the Remove X button to close the firmographic.

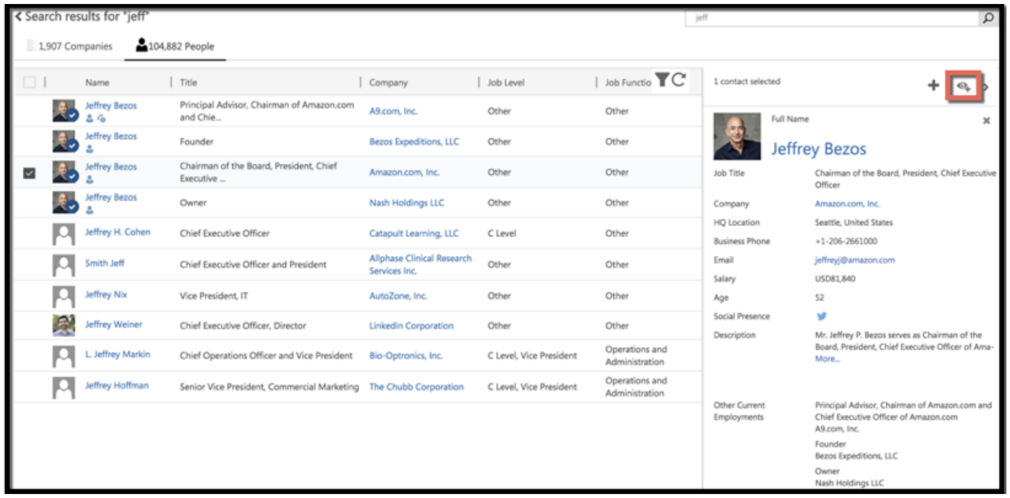
Add a Contact to a Watchlist

The Preview pane allows you to add a contact to your Insights Watchlist. Here's how:

1. Go to the Contact Preview pane.



2. To add a contact to Watchlist, select the desired contact and click the **Add to Watchlist** button .

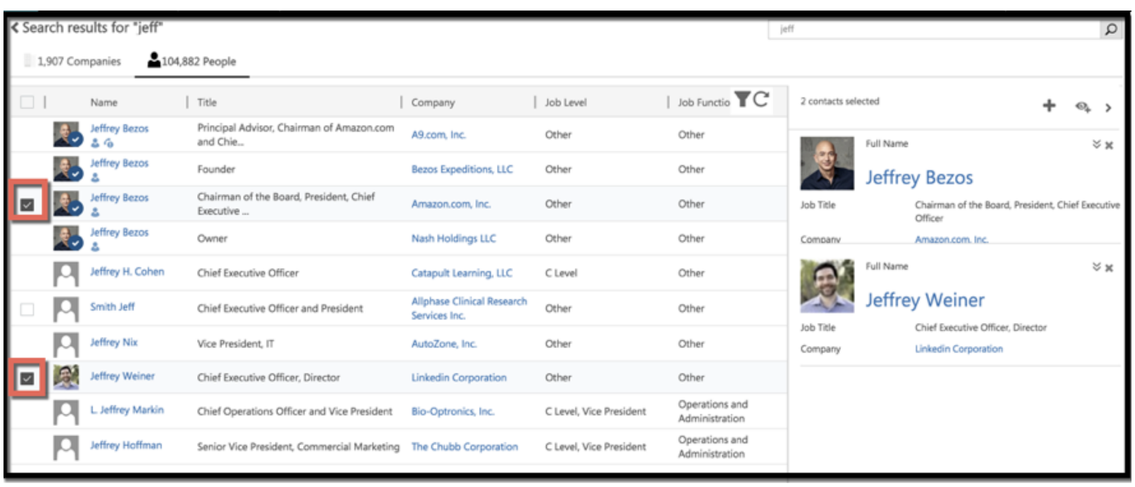


3. The contact is added to your Watchlist.

Add Multiple Contacts

You can add multiple contacts to Dynamics 365 environment and add them to Watchlists from the Contact Preview pane. Here's how:

1. Go to the Contact Preview pane, and then select the check box for multiple contacts.



2. Complete any of these activities for the selected companies:

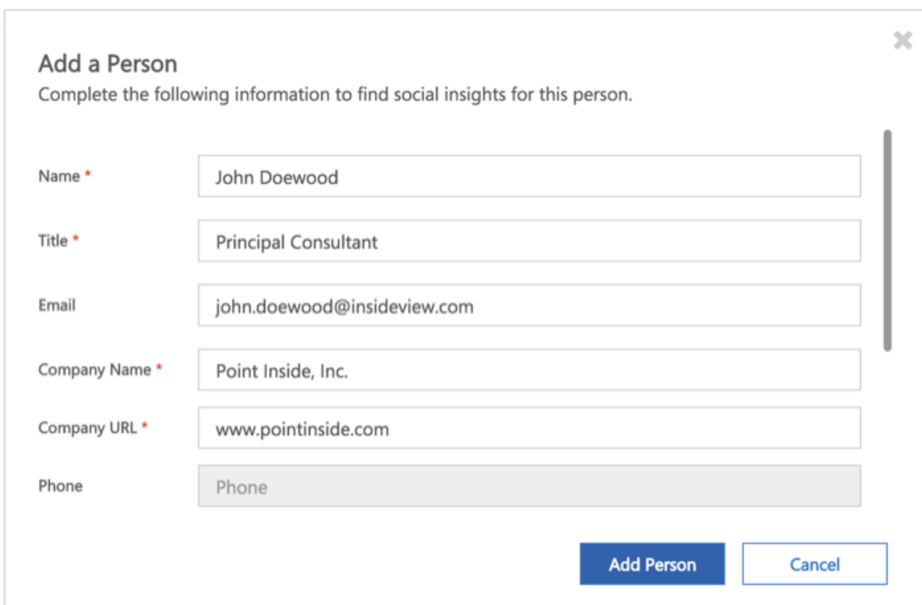
- To view firmographic data, click the **Show Firmographics** button .
- To add contacts to your Dynamics 365 environment, click the **Add to CRM** button .
- To add contacts to your Watchlists, click the **Add to Watchlist** button .
- To deselect contacts selection, click the **Remove X** button**.**

Add a Missing Contact

If you don't find a contact in the search results, you can add that contact data in the Insights database. Here's how:

1. Go to the Contact Details page, and then click the **Add a Contact**  icon.

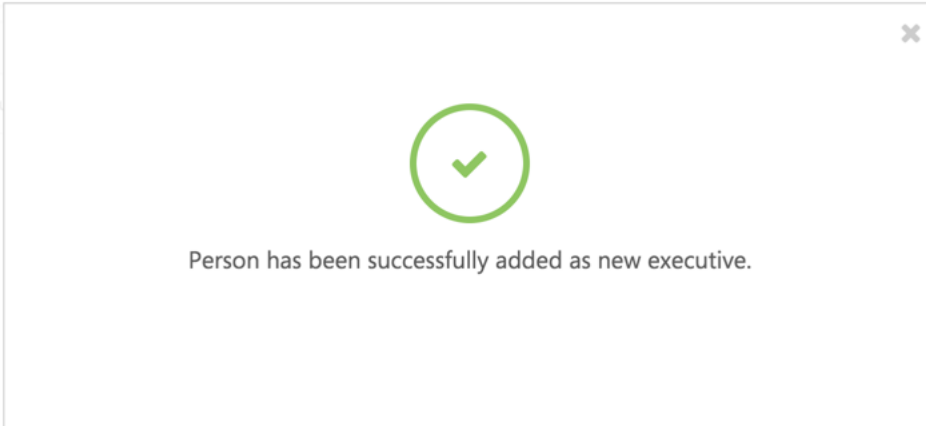
2. In the Add a Person dialog, enter the person's **name**, **title**, **email**, **website URL**, **Street**, **City**, **State/Province**, **Postal/Zip Code** and **Country** details that you wish to add.



Note: You will see the **Add a Person** link in the following scenarios:

- When zero matches are found for a contact
- When you see "did you mean?" in search results
- When no recommendation is available for a contact

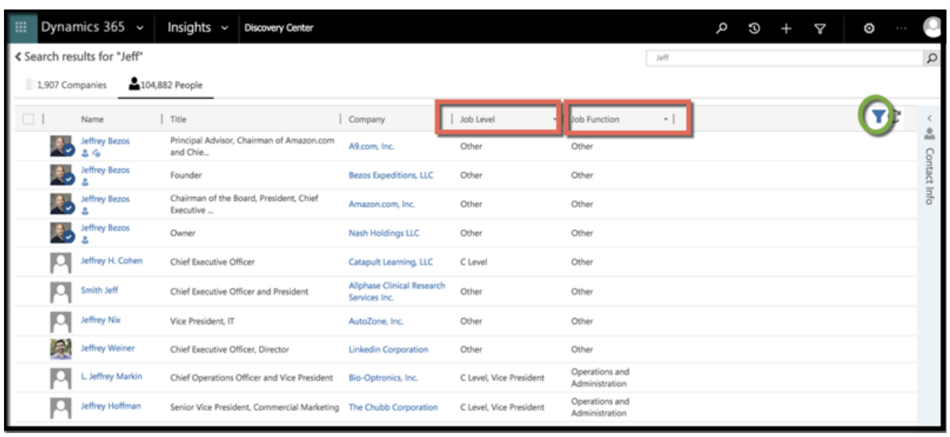
3. Click the **Add a Person** button. Once the contact is added, the confirmation message appears.



Filter Contacts

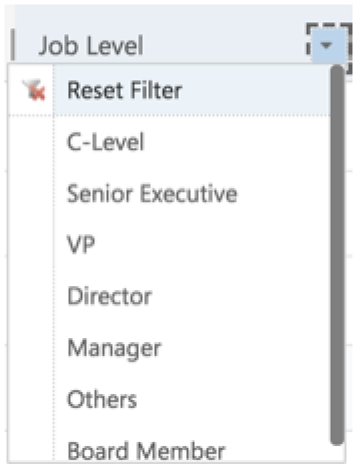
In the Contact Preview pane, you can also narrow down your search, using various filters. Here's how:

1. Go to the Contact Preview pane, and then click the **Filter** button  to see a filtering options.
2. The Filtering Options become visible and button changes to blue color .

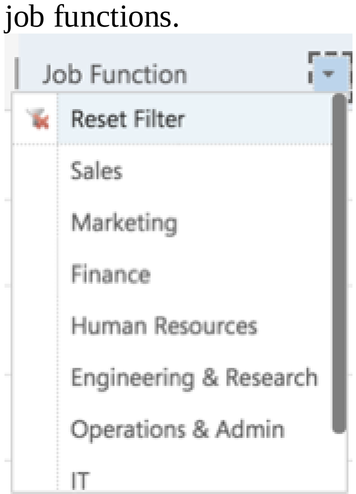


3. You can use the following options to filter your search for a company:

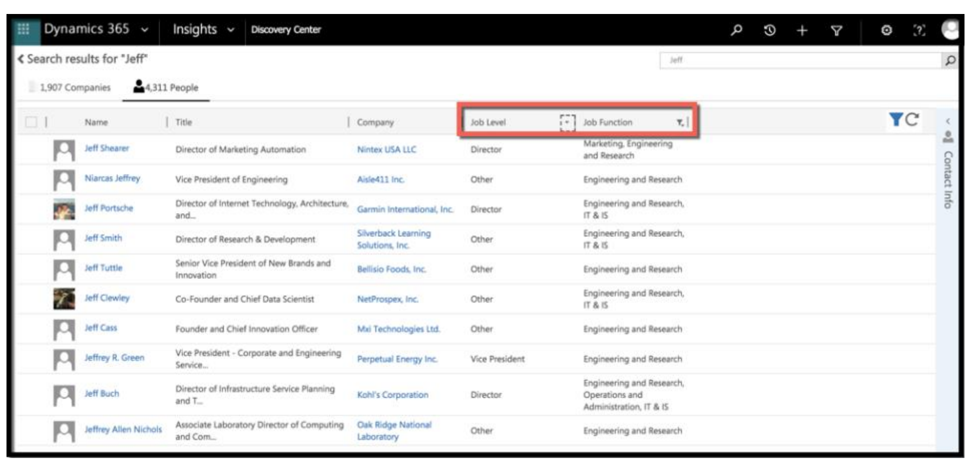
- **Job Level**: select a job level from the list.



- **Job Function**: Select a job function for contacts. You can scroll to view more job functions.



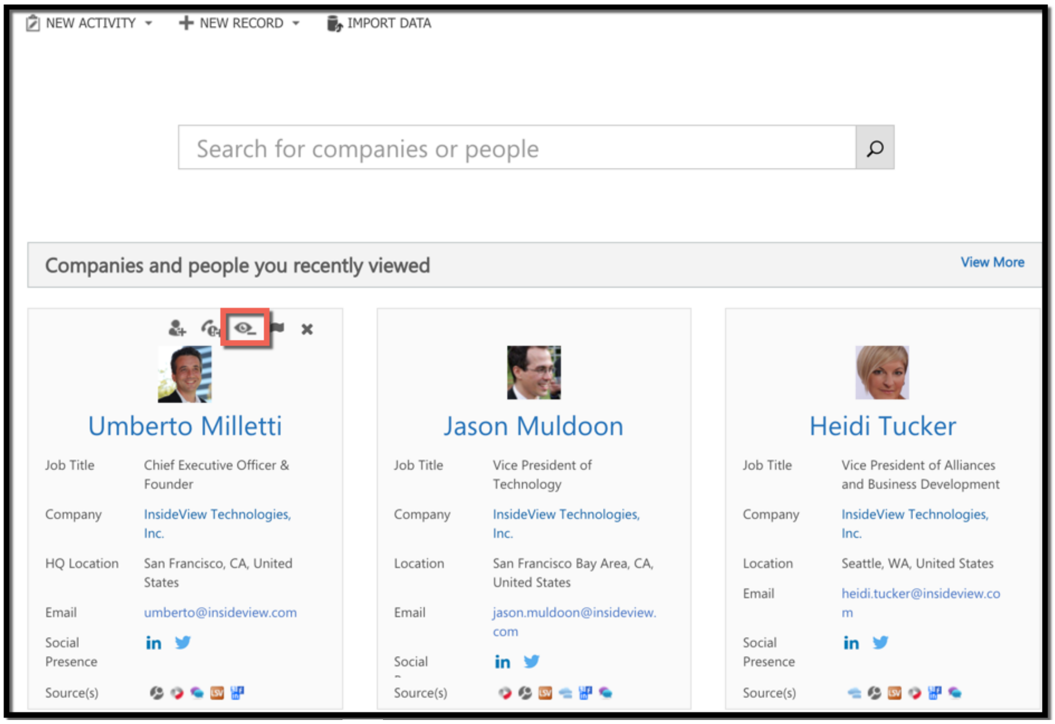
4. The contact results will change dynamically as per your selection of filters.



Watchlist Stream Functions

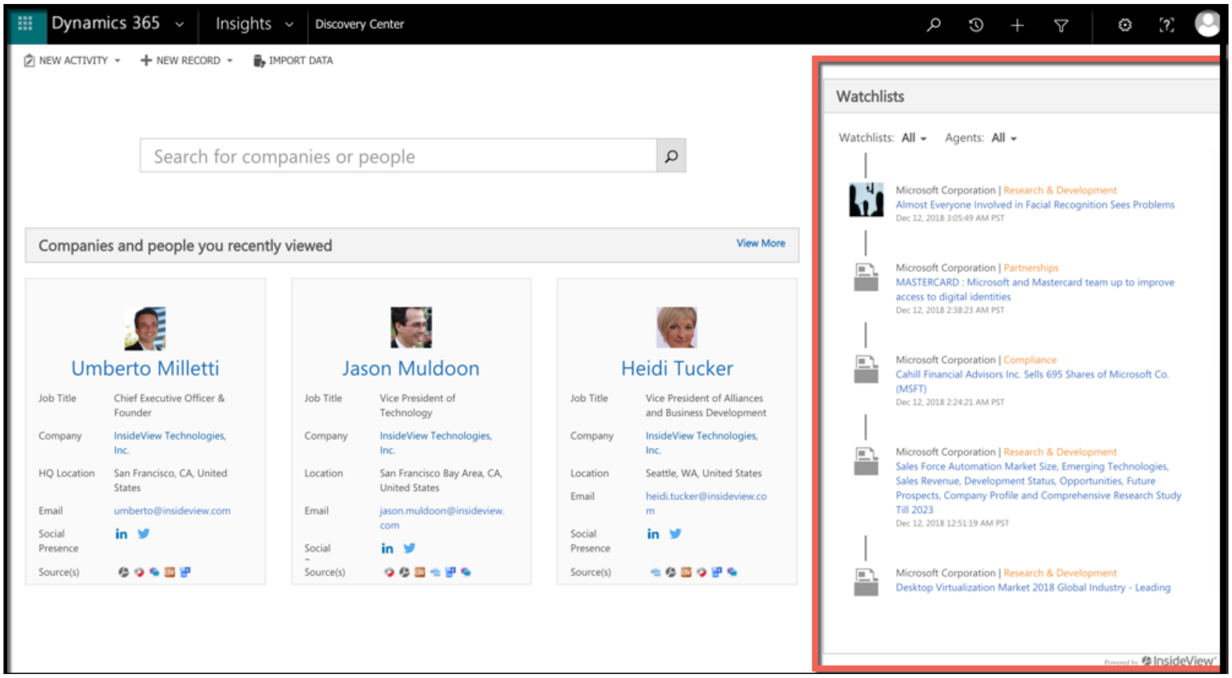
The Watchlist Stream shows all watchlist activities that you have performed on a weekly basis and you can also view the news feed for the companies you are following using the Watchlist tab. Here's how:

1. Go to the Discovery Center.

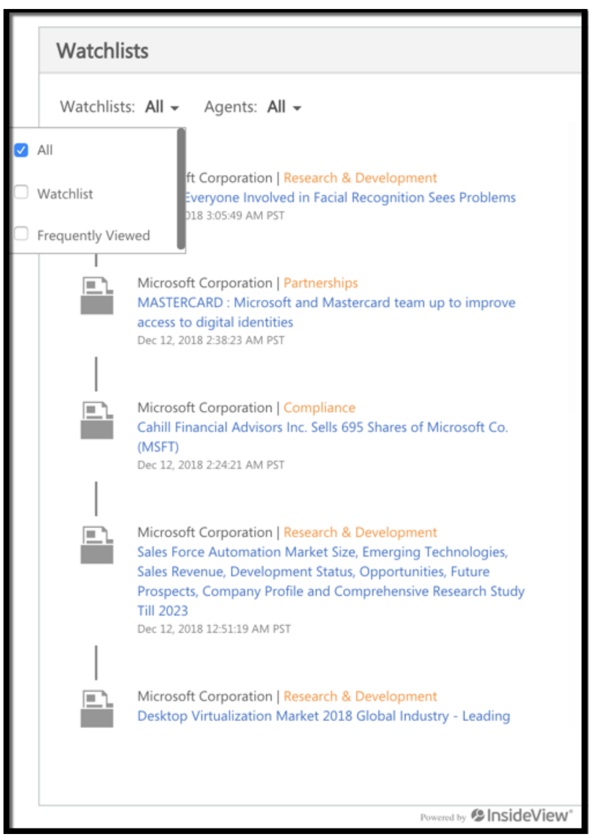


2. Click the **Add to Watchlist** button to add several companies and contacts to your watchlists.

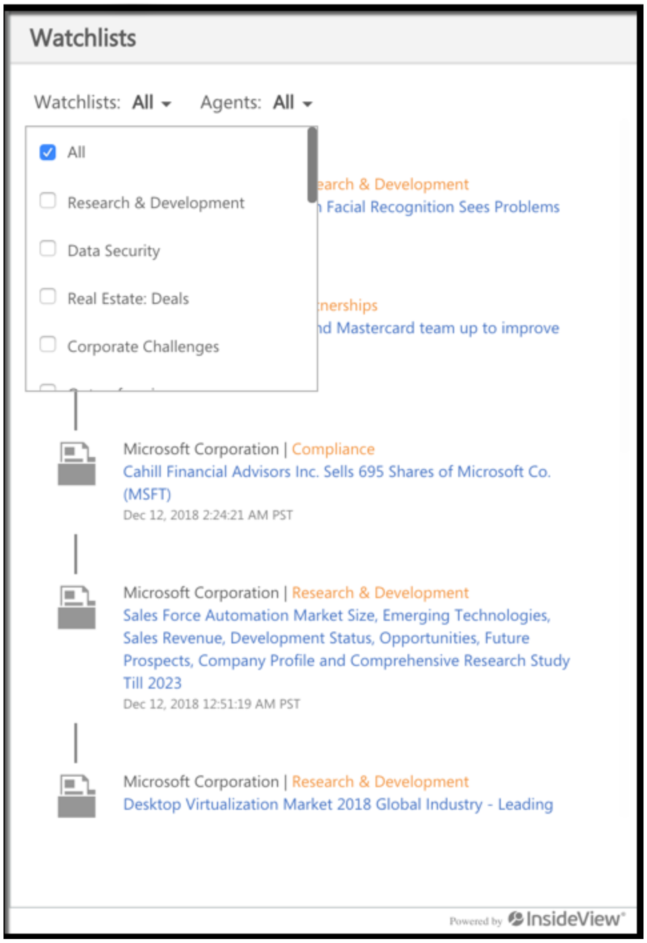
3. Review the watchlist activities to the right side, which now shows the contacts and companies you have just added.



4. Click on the **Watchlist** menu to select from the following options.



5. Click the **Agents** menu to select an agent from the standard 18 company agents.



6. Read the Manage Your Watchlists and Set up your company insights section for more information.

Chapter 12: User preferences

InsideView Insights helps you manage personal settings for your company insights, connections, and Watchlists, and access Insights through an Outlook client.

Company Insights

Staying informed about news and events involving your target accounts can help you identify new sales opportunities, figure out the best time to call, and then craft just the right message for when you reach out.
Insights is infused with search agent technology that continuously scans more than 40,000 web, news, and social sources to extract and categorize current events about all of the companies you are interested in.
An automated natural language processing (NLP) algorithm "reads" the articles, identifies the company referred to, and sorts the articles into one of these Company Insights categories:

- ❑ Leadership Changes
- ❑ New Offerings
- ❑ Acquisitions
- ❑ Partnerships
- ❑ Expanding Operations
- ❑ Cost Cutting
- ❑ Out Performing
- ❑ Under Performing
- ❑ Company Presentation
- ❑ Litigation
- ❑ Compliance
- ❑ Research and Development
- ❑ Data Security
- ❑ Funding Developments
- ❑ Bankruptcy and Restructuring
- ❑ Real Estate: Deals
- ❑ Real Estate: Construction
- ❑ Corporate Challenges

Set up your Standard Agents

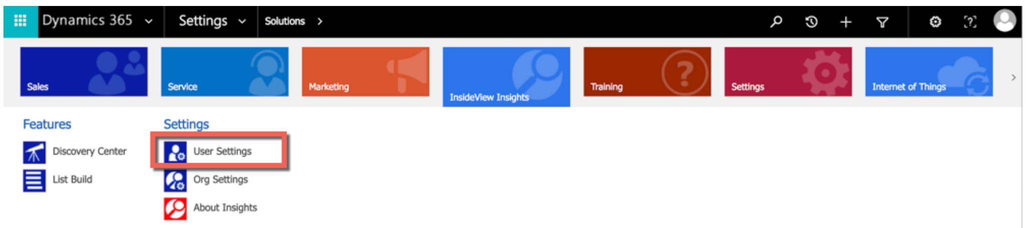
Standard agents are predefined with select keywords to gather specific business events related news, such as Leadership Changes, New Releases, etc. These agents are selected by default on the **Company Overview** tab.

You can set up your company insights by choosing search agent categories from a list of standard items. By selectively enabling these categories, you can customize the news and events that are shown in Insights, focusing on the articles most relevant to you. For more information, see the Company Insights section.

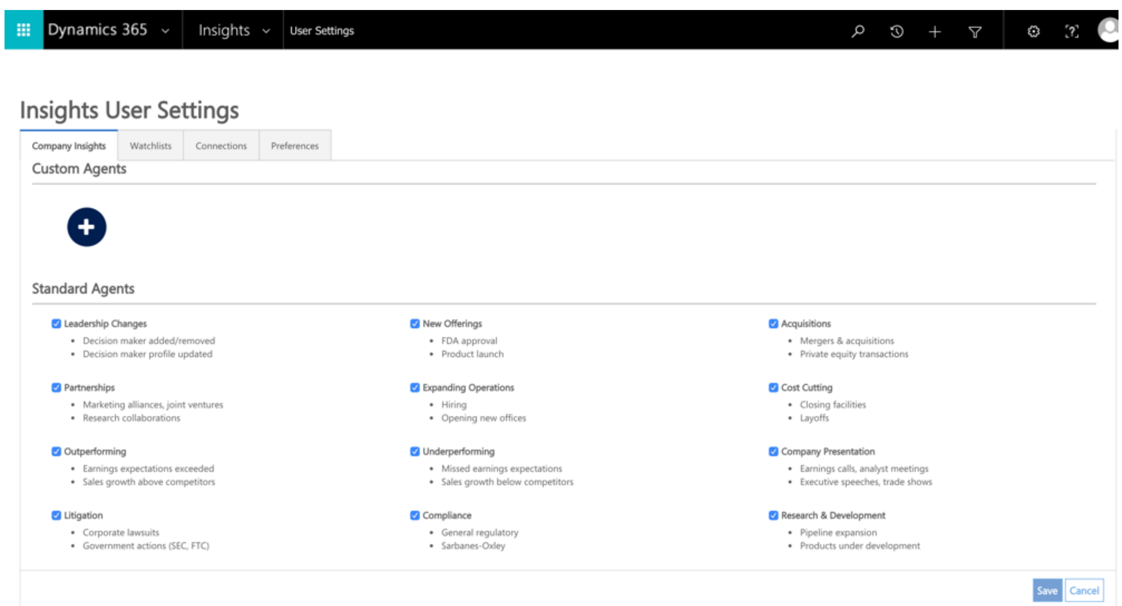
Follow these steps to modify your **Standard Agents**:

1. Sign in to your Microsoft Dynamics application.

2. Go to **Dynamics 365 > InsideView Insights > User Settings**.



3. On the Insights User Settings page, select the **Company Insights** tab to modify the **Standard** agents' settings scroll down.



4. By default, all **Standard** agents are selected. If you don't want to see insights for a category, clear the check box for that category.

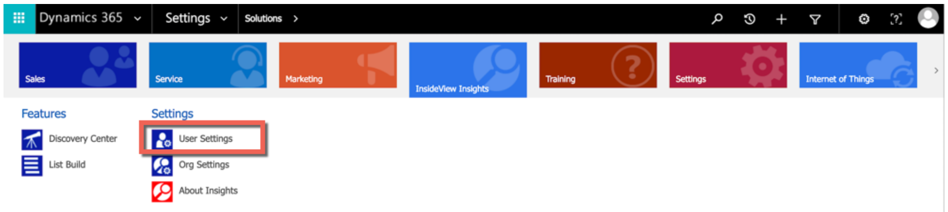
5. Click **Save**.

Manage Custom Agents

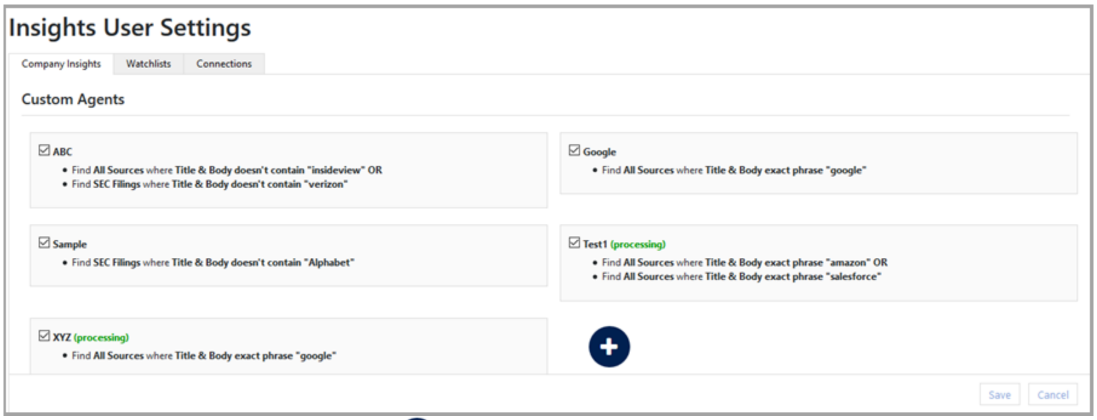
Custom Agents allow organizations to extend and personalize the monitoring capabilities of Insights beyond the standard agents provided with the Insights solution. Organizations can create Custom Agents to find media coverage, business events, and discussions using a set of conditions specific to their sales efforts.
Every organization is different and what represents a significant business event to one may not be important to others. The standard agents included with Insights provide organizations with the ability to monitor for many common business events across industries and geographies. However, building your own custom agents may provide your team with increased intelligence specific to your organization.
TIP: Effective custom agents can often be "reverse engineered" by finding press releases or other news items that report the type of event you're interested in. Look at keywords and phrases used and apply these to create a Custom Agent. For example, an article about "encryption" may also discuss "tokenization". Including this keyword in a custom agent may expand results while maintaining relevance.

1. Sign in to your Microsoft Dynamics application.

2. Go to **CRM > InsideView Insights > User Settings**.

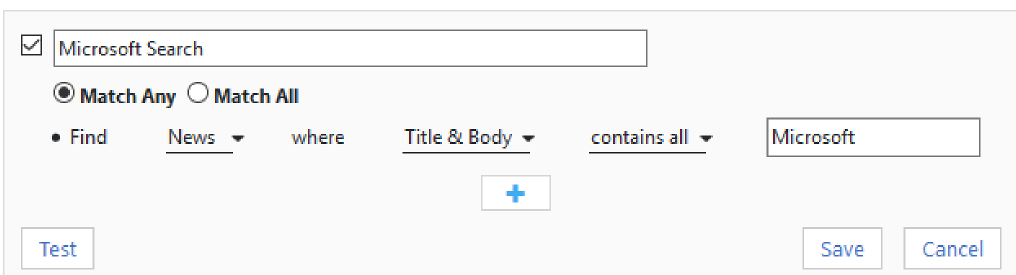


3. On the Insights User Settings page, select the **Company Insights** tab to modify or add **Custom** agents.



4. Click the **Add Custom Agent** button to add a new agent.

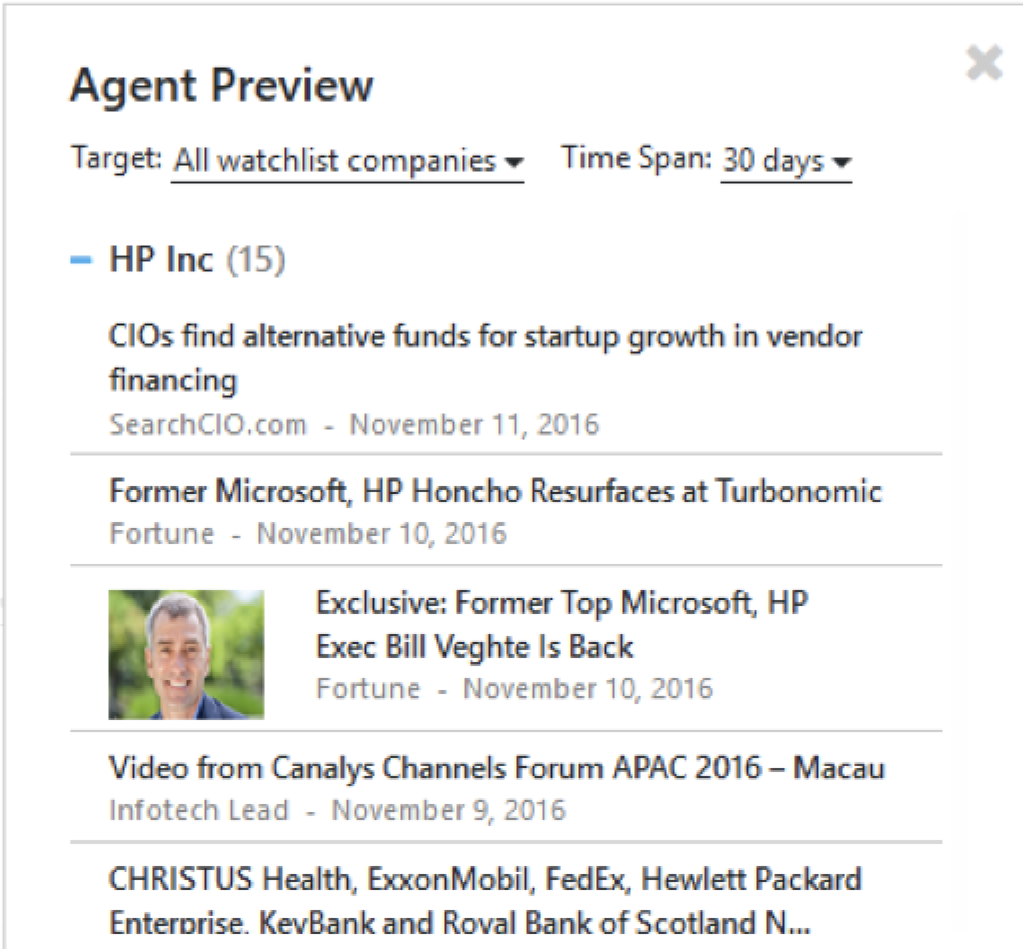
5. To create a new custom agent, enter the following information:



- Enter a name for the agent in the **Agent Name** field**.**
- Select either the **Match Any** or **Match All** option
- Specify these search conditions:
  - In the **Find** field, select any of the sources, i.e. **All Sources**, **News**, or **SEC Filings**.
  - In the **Where** field, select any one of the option, i.e. **Title & Body**, **Title** or **Body**.
  - In the **Phrase** field, select any one of the option, i.e. **exact phrase**, **contains all**, **contains any**, or **doesn't contain**.
  - In the **Keywords** field, enter the comma-separated words that you wish to search. For example, **Microsoft**.
- Refer to the Custom Agent Conditions table for more information.

- To add more conditions, click the **Add Condition** button and repeat steps 5 and 6.

6. Click the **Test** button to review the results the Agent returns against your Watchlist(s).



- Change the **Target** field settings by selecting any one of the option, i.e. **All Watchlist companies**, **Watchlist**, or **Frequently Viewed**.
- Specify the **Time Span** ranging from 1 to 30 days.
- Click the **X Close** button to close the Test window.

7. Click **Save**.

Custom Agent Conditions

Condition	Option	When to use this option	How it works
Match Any/Match All	Match Any	To expand results	For agents with multiple criteria, returns results when any of the criteria are met.
	Match All	To narrow results	For agents with multiple criteria, only returns results when all of the criteria are met.
Find	All Sources	To expand results	Returns results from both news and SEC filings.
	News (only)	To narrow results and improve performance	Returns results from only news sources. Recommended option for sources unless specific information from SEC filings is required.
	SEC Filings (only)	To narrow results	Returns results from only U.S. *Securities and Exchange Commission* (SEC) filings. Most useful when there is specific information within an SEC filing you want to monitor, like material events, executive changes, or legal investigations.

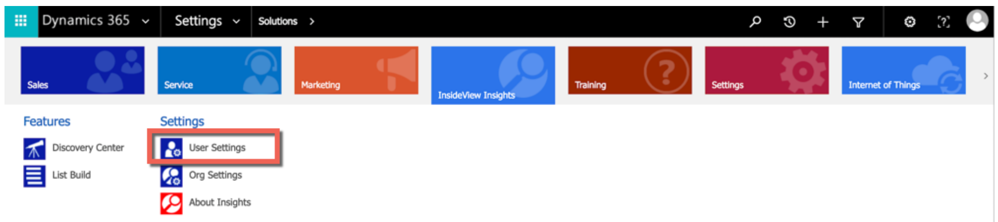
Where	Title & Body	To expand results	Search the title and body of the article for the keyword.
	Title (only)	To narrow results	Search just the title of the article for the keyword.
	Body (only)	To expand results	Search just the body of the article for the keyword. Best used when keywords do not appear in the title of an article.
Phrase	Contains All	To narrow results	Results must include all of the keywords entered.
	Contains Any	To expand results	Results include any of the keywords entered.
	Exact Phrase	To narrow results	Results must include all of the keywords entered.
	Doesn’t Contain	To narrow results	Excludes results that contain keywords that are irrelevant to the search. Should only be used when “Match All” option is selected.

View your Team Agents

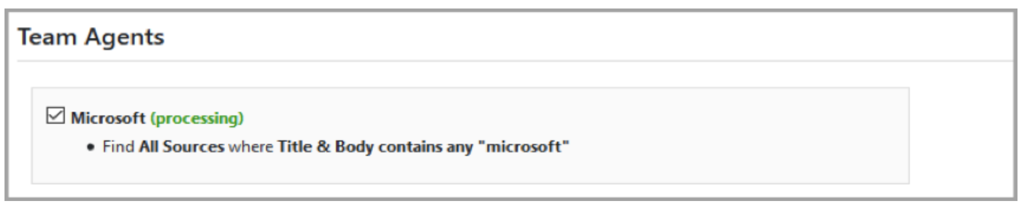
The Team Agents are available only to users who have purchased Insights Enterprise license directly from InsideView. Team Agents are agents created for you, according to your requirements, by your InsideView customer success manager (CSM), which you can share across your team.

1. Sign in to your Microsoft Dynamics application.

2. Go to **Dynamics 365 > InsideView Insights > User Settings**.



3. On the Insights User Settings page, select the **Company Insights** tab to view **Team** agents.



Manage your Watchlists

Watchlists let you follow people or companies for business opportunities. Follow the instructions below to view your Watchlists, export your Watchlists, and edit email alert notification rules for your Watchlists.

1. Go to the User Settings page, and then select the **Watchlists** tab.

2. On the **Frequently Viewed** subtab, review the Watchlists that have been added based on frequent clicks on a company or a contact name.

Note: Frequently Viewed Watchlists are Watchlists that automatically track companies and people you view frequently (a company or contact's profile that you view more than five times is automatically added to this Watchlist). You can remove a company or contact from this Watchlist, edit your email notification settings, and turn the Watchlist on or off according to your preferences.

3. Click the **Edit Rules** link to open the Rules dialog and edit the Frequently Viewed Watchlists settings.

4. To set up your preferences on when to add a company or contact to a Watchlist, enter the number of views and days in the **Add Companies and People If Viewed** field. For example, if you want all the companies and people you view more than three times in the last three days to be added to your Frequently Viewed Watchlist, select 3 and 3.

5. To set up your preference on when to remove a company or a contact from a Watchlist, set the number of days in the **Remove if not viewed in the past** field.

6. Click **Save**.

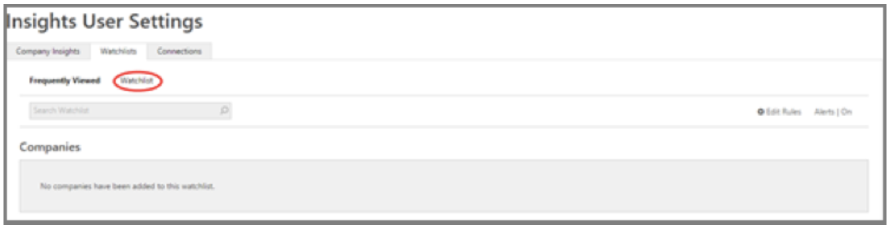
Manage companies and contacts on your Watchlists

The **Watchlists** subtab displays all the companies and contacts that you have added to your Watchlists. For more information, see Add a Company or a Contact to a Watchlist.
Note: You can track up to 200 companies and/or people per list for a total of 1,000 entities. InsideView recommends you to set 1 Watchlist for Top Customers, 1 for prospects and 1 for competitors.

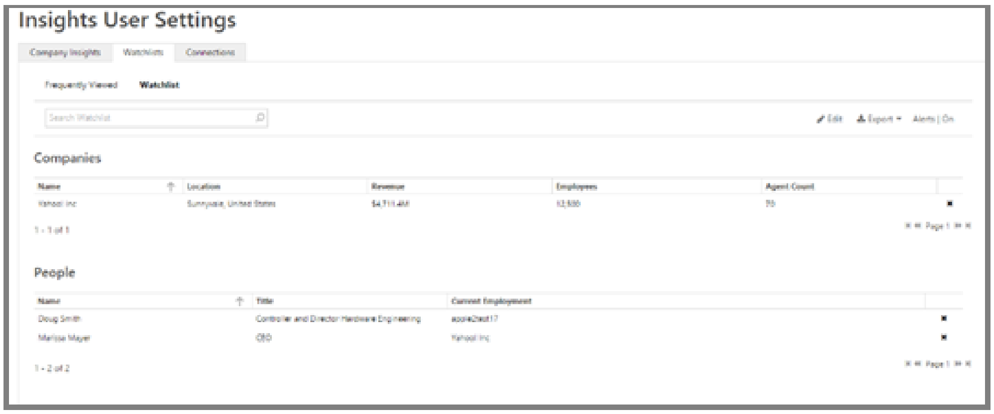
Edit the Watchlist

1. Go to the User Settings page, and then select the **Watchlists** tab.

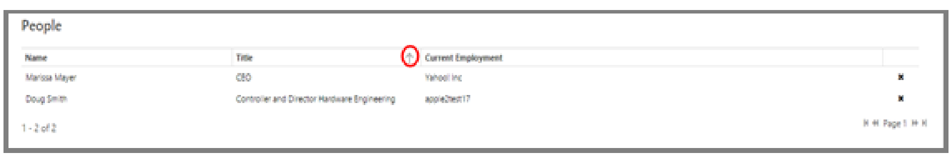
2. Click the **Watchlist** link.



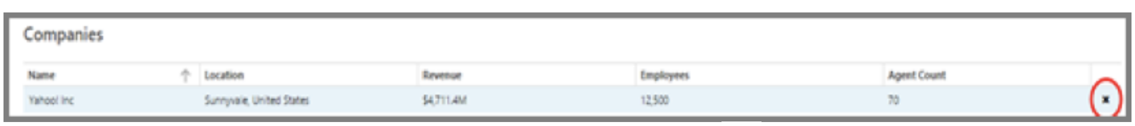
3. On the **Watchlist** subtab, review the companies and contacts you are following.



4. To change the sorting of companies and contacts on your Watchlists, click the header of any column.

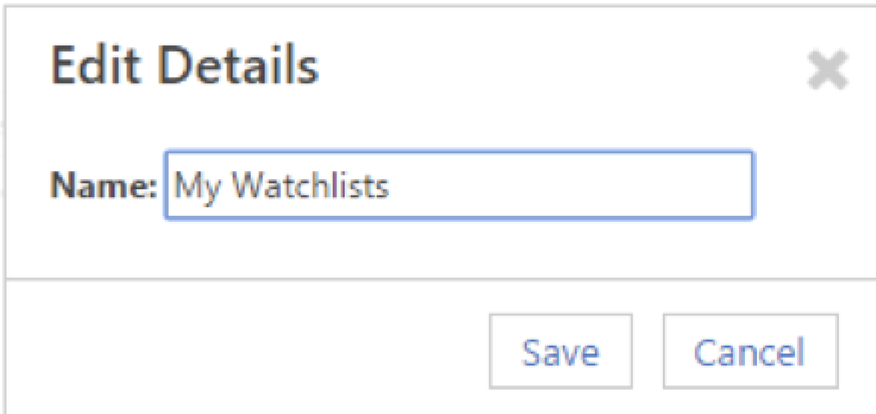


5. To remove the company or a contact from your Watchlist, select the record and click the **X** at the end of that row.



6. To edit the name of the Watchlist, click the **Edit** button  .

7. In the Edit Details dialog box, type a name for your Watchlist.



8. Click **Save**.

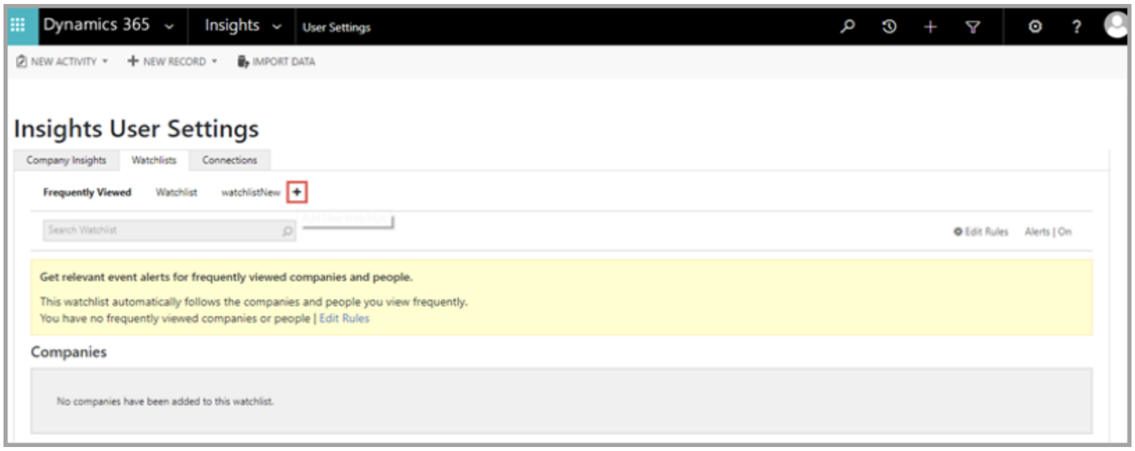
Manage Multiple Watchlists

The **Add New Watchlist** button allows you to create up to five Watchlists to track companies and people, so you'll be the first to know about changes that can represent opportunities or threats, and signal when it's time to reach out. For more information, see [Add a Company or a Contact to a Watchlist].

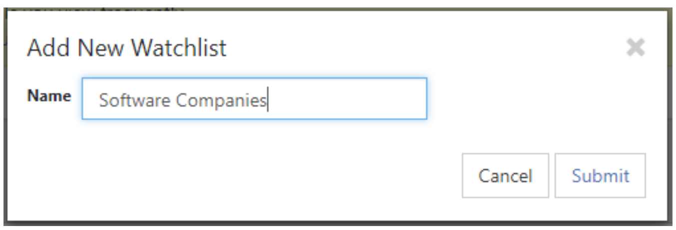
Having five Watchlists allows you to set them up for different purposes; for example: one Watchlist can be used to track prospects who are already in your CRM, while another can track news on your competitors, without adding them to Dynamics.

Create the New Watchlist

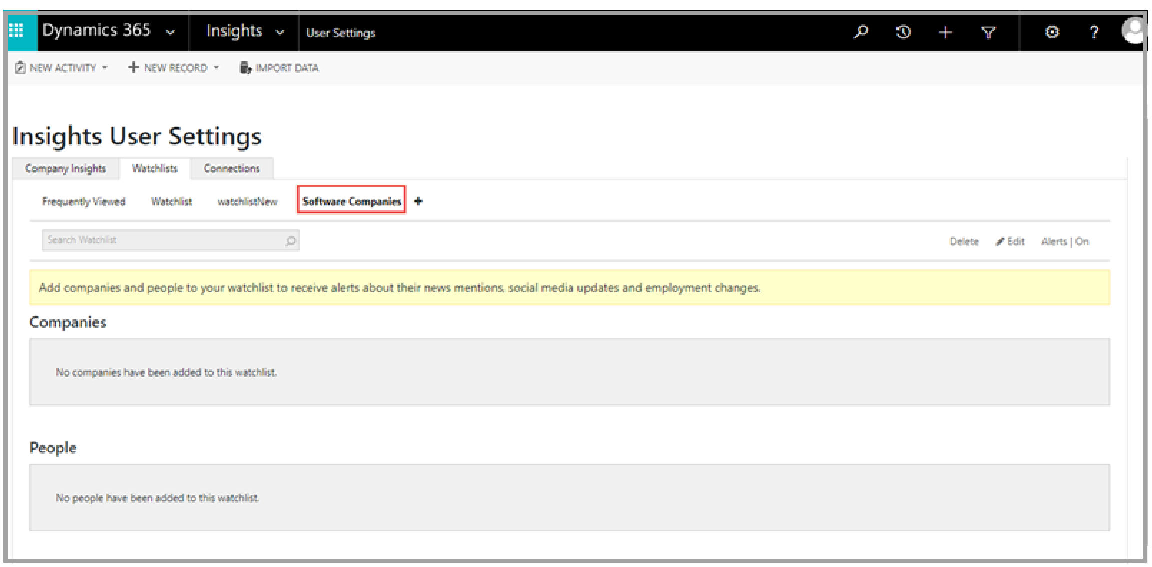
1. Go to the User Settings page, and then click the **+ Add New Watchlist** button.



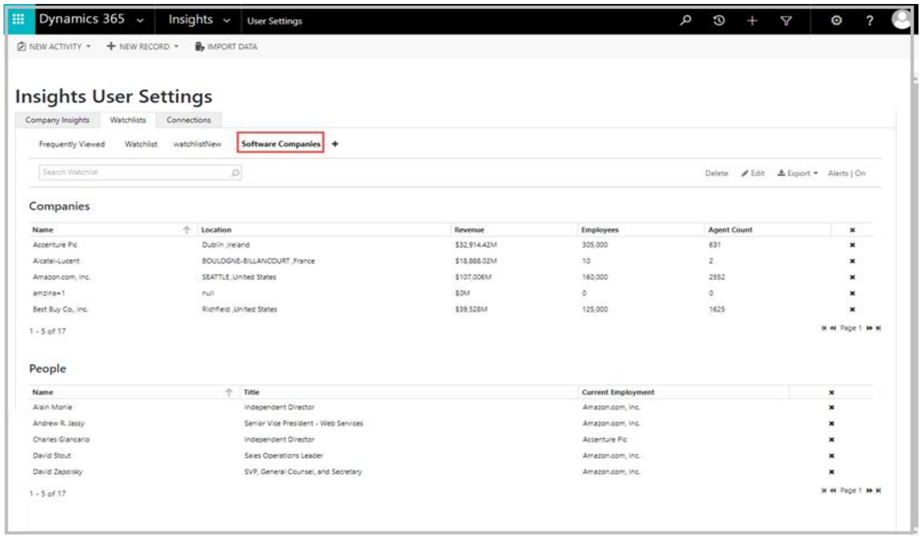
2. In the Add New Watchlist window, enter the name for your Watchlist.



3. Click **Submit**. The Watchlist name appears on the screen.

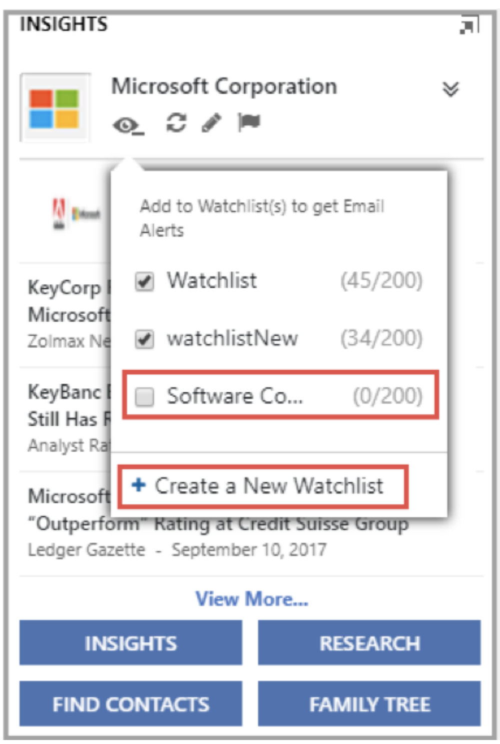


4. Add companies or executives to your Watchlist from the Discovery Center, Find Contacts or List Build grid.



5. Click **Edit** to edit the Watchlist name.

   Note: You can also create a new Watchlist from the **Summary View** of the Insights panel and select a particular Watchlist from drop down menu. The option to create a new watchlist is visible only when you have added one or more existing watchlists in your instance.



6. To edit and sort your new Watchlists, follow step 3 to 8 in the Manage companies and contacts on your Watchlists section.

Export Company or People in the Watchlist

You can export names of companies and people that you are following in your Watchlist. Here's how:

1. Click the **Export** button  in the Watchlist page.

2. Select the **Export company** or **Export people** link to export your Watchlist in a **data.csv** file.

Edit email alert settings

InsideView Insights sends you regular email alerts with news updates for companies and contacts on your Watchlists. By default, you will receive a daily summary email. However, you can change the settings for both company and contact Watchlist separately. Here's how:

1. Go to the User Settings page, and then select the **Watchlists** tab.

2. On the **Frequently Viewed** or **Watchlist** subtab, click the **Alerts|On** button.

3. In the **Alert Me** section, select the frequency as Daily, Weekly or Never (off). The Never (off) option disables email alert notifications for Watchlists.

4. In the **Email Type** section, select the type of news either as All News or Summary.

5. In the **Email Format** section, select your preferred email format as either HTML or Plain Text.

6. Click **Save**.

Sync Limits for Enterprise and Insights License Users

The number of People or Companies you can sync or add to your CRM depends on the Insights credits that you have purchased.

You can sync/export the following information:

InsideView License	Feature	Sync, Add to CRM or Export to CSV Limit	Maximum Records Allowed to Export Limit
Enterprise	Find contacts Discovery Center List Build CRM View	**500** each for Company and Contact sync and export to CRM from the List Build, Discovery Center and Find Contacts grid in the CRM View. **500** each for Company and Contact for export to csv from list build. The remaining monthly balance credits are carried over to the next month.	2000 (if credits are available)
Insights	Find contacts Discovery Center List Build CRM View	**Unlimited** credits for both Contact and Company sync and export to CRM from the List Build, Discovery Center and Find Contacts grid in the CRM view. **500** each for Company and Contact for export to csv from list build only in Insights 4.2 and 4.3 versions. The remaining monthly balance credits are NOT carried over to the next month.	2000 (if credits are available)

Set up Preferences for the Insights tab

InsideView Insights allows you to keep the Insights Summary Panel in expanded view always. By default, an administrator might have selected collapsed option for any tab in which the

Insights Summary panel loads. You can now set the preference to keep the summary panel always expanded. Here's how:

1. Go to the User Settings page, and then select the **Preferences** tab.

2. In the Preferences tab, select the **Keep Insights tab expanded** check box.

Sync or view currency information

InsideView Insights lets you view or sync the Revenue value for an account, opportunity or a lead object based on the currency type defined in the **Entity**, **Personal Options** page, or user **locale** for that particular object.

How sync or view the currency information works

- Insights will consider the following settings to sync or display the Revenue value for a company, which are as follows:
  - The **Billing Currency** field in an Entity Object
  - The **Currency** field in the Personal Options screen
  - User Locale (i.e. Insights Locale setting)
- Insights currently supports only **EURO (€)**, **US DOLLAR ($)**, and **POUND STERLING (£)** currency types. Other currency types that you have set in the **Personal Options** or **Entity Object** will be replaced with the setting in the **User Locale**.

- When the currency type of an Entity Object is predefined, Insights will consider that setting to display the revenue in Insights.
- While syncing the Revenue value, Insights prioritizes the currency type settings in the following order:

- The Entity Object level preferences are used first, in case the currency type is not **US DOLLAR, EURO** and **POUND STERLING**, then Insights uses the currency type defined in the **Personal Options** setting.

- If both settings differ from the currency types supported by Insights, then it will consider the currency type defined in the **User Locale**.

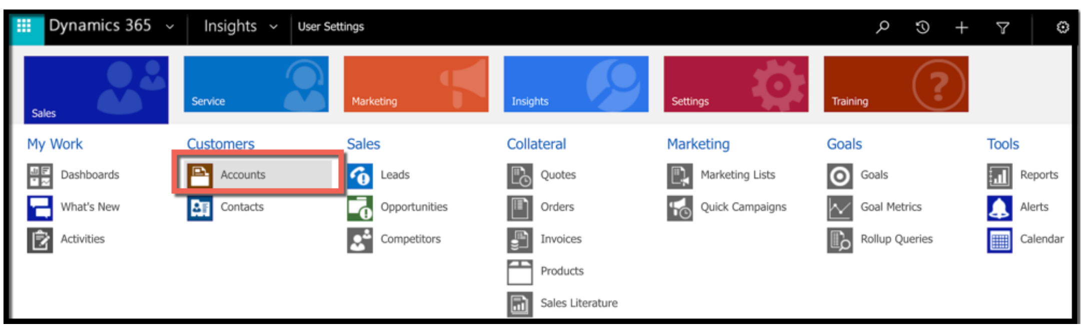
For example, if the default currency type is set to **US Dollar** in the CRM but a specific account's **Billing Currency** is set to **EURO**, Insights will use **EURO** for the Revenue value when you sync the currency information for that particular account.

To view or sync the currency information follow these steps:

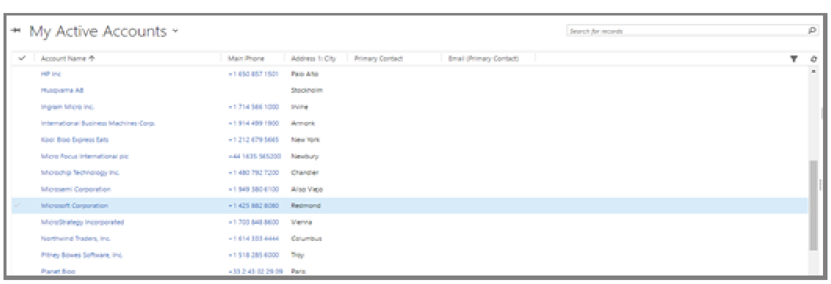
1. On the navigation bar, click the **Main** button.

2. Go to the **Sales**, **Service**, or **Marketing** work area.

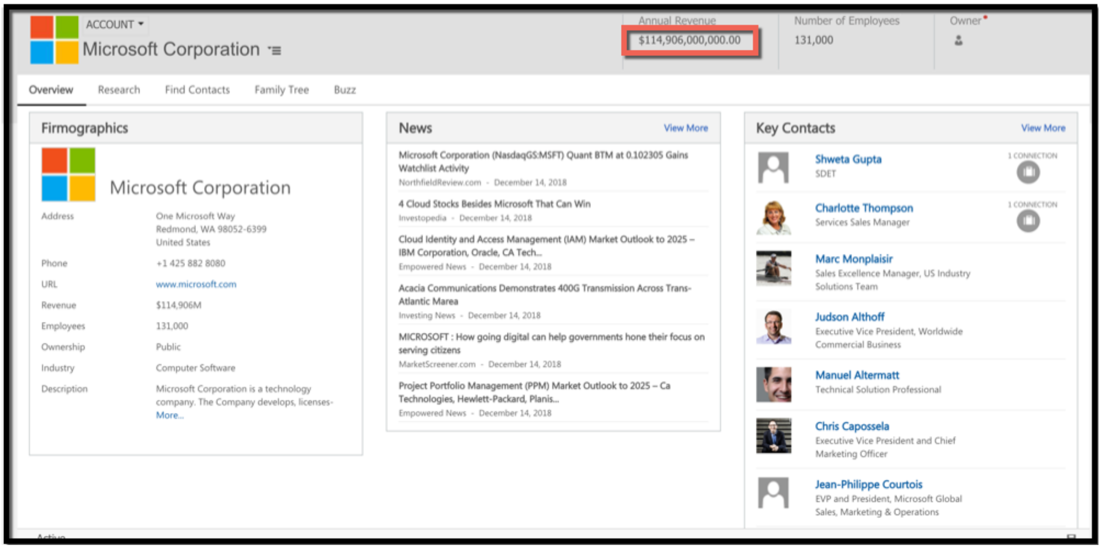
3. Click the work area name, and then click **Accounts**.



4. Open an account.

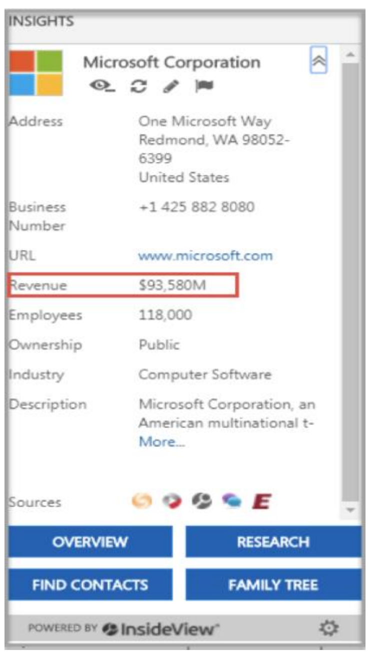


5. The Account Details page opens. Scroll down to see the currency setting.



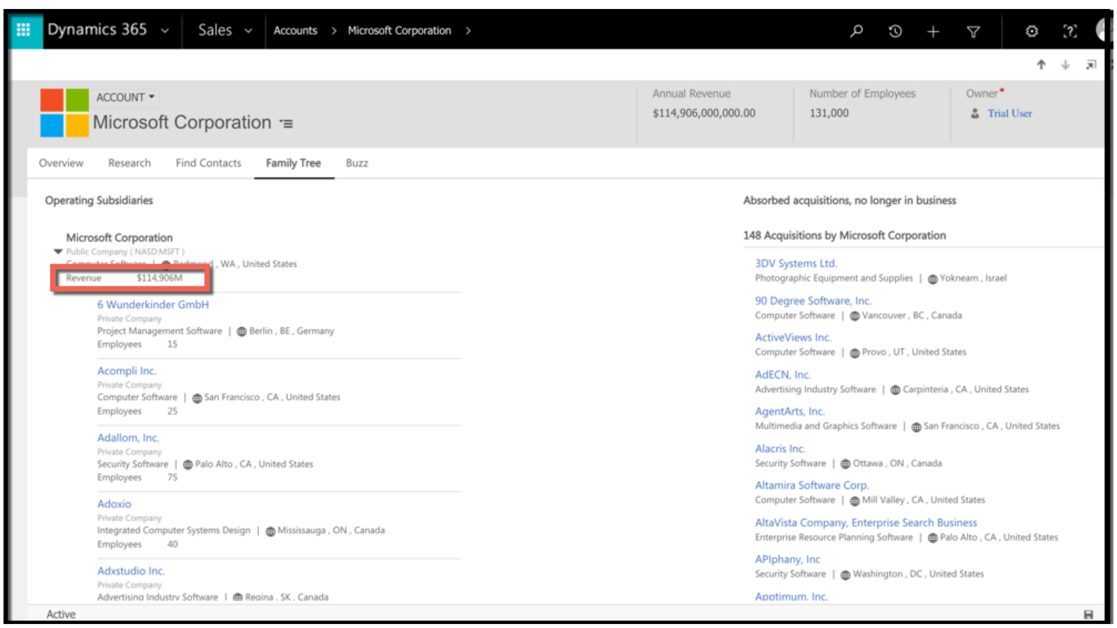
6. The currency type setting that is defined for an account, opportunity and lead is displayed in the following screens as Revenue value:

- Summary or Firmographics

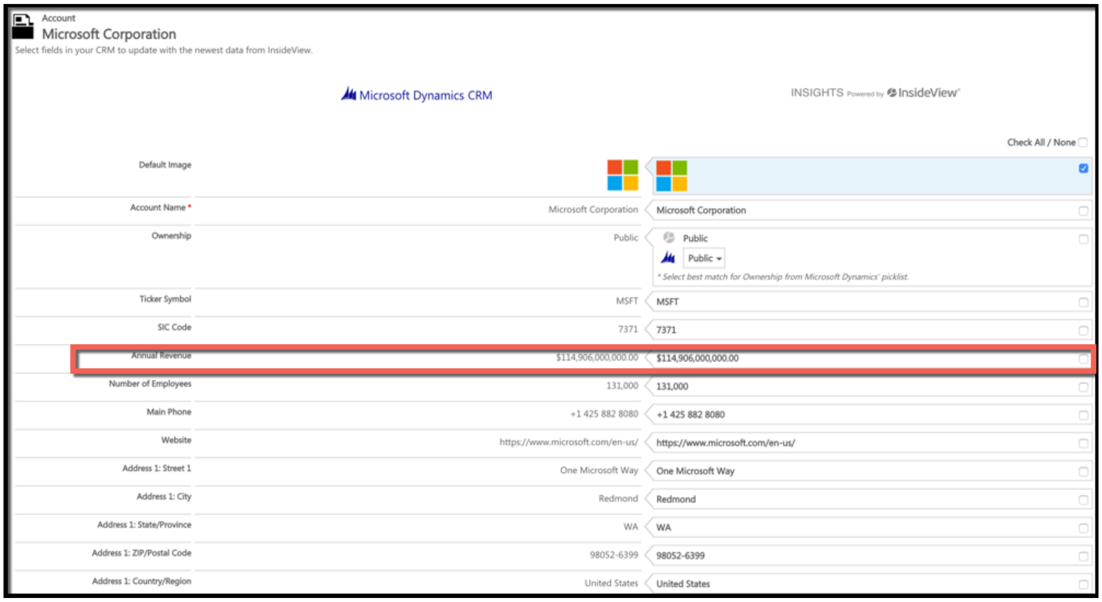


- Competitors /Similar Accounts

- Family Tree



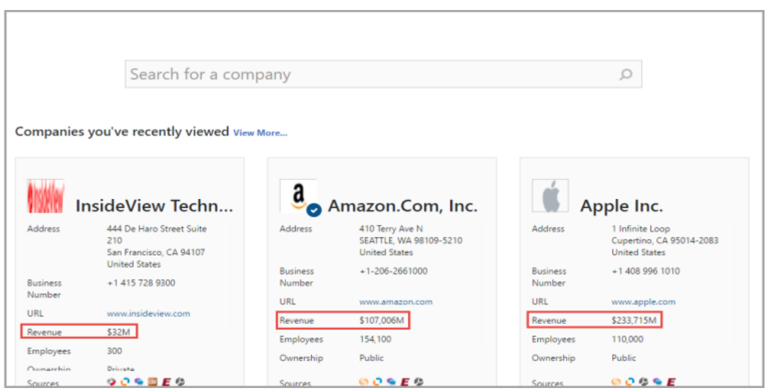
- Company Sync



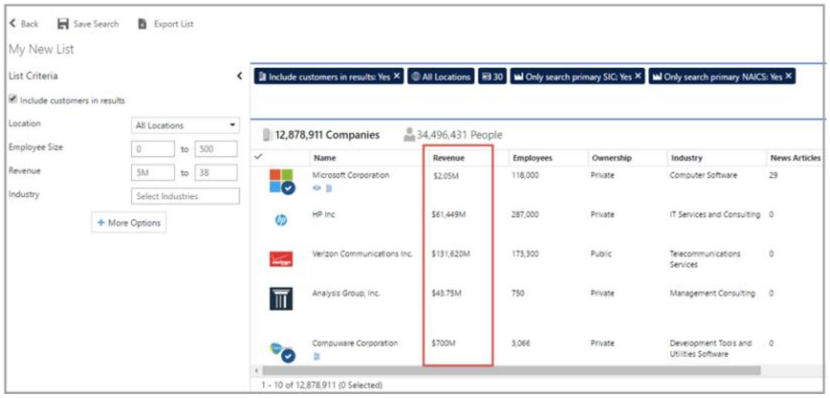
Note: To sync or view the company revenue value in the Account Sync page above, the **Revenue** field should be selected in the field mapping settings.

7. If you are viewing the **Revenue** information in the Discovery Center, List Build and User Setting page, the first preference is given to the **Personal Options** page currency type setting and then setting defined in the user **locale**. The Revenue information appears in the following pages:

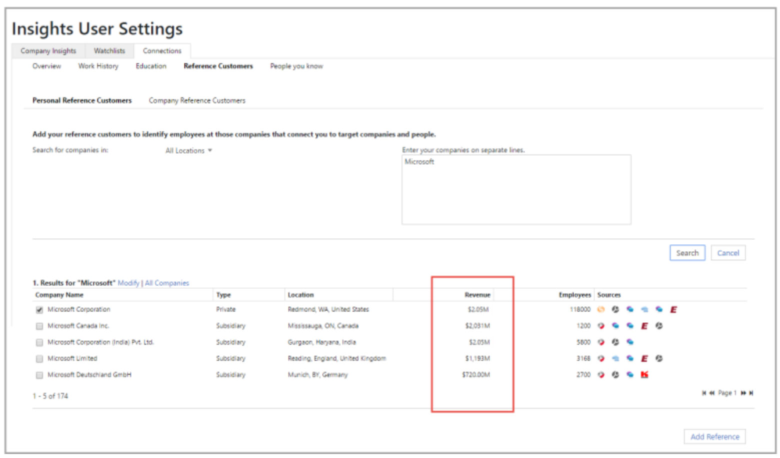
    - Discovery Center



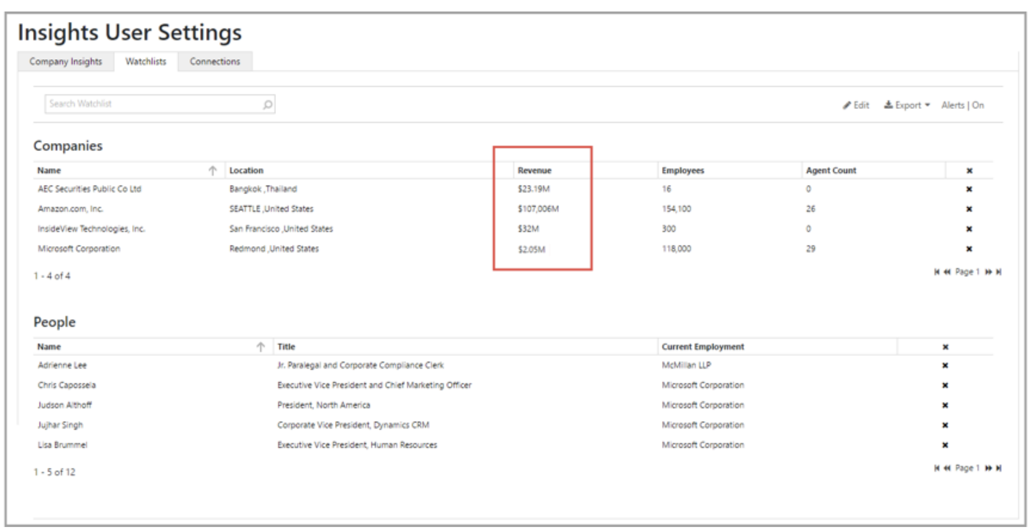
    - List build



- Reference Customer grid



- Watchlist Grid



Set up your connections

InsideView Insights helps you expand your referral network significantly and get warm introductions to your prospects by providing a single platform to leverage all your existing social and professional contacts as connections.
Connections is one of the most powerful features of Insights because connections allow you to consolidate your professional network, which may be dispersed across various places, into a single location where the information is always at your fingertips.

InsideView Insights lets you combine professional contacts from LinkedIn, Gmail, Outlook, and other sources. You can supplement this information by entering your education, past employers, reference customers, and contacts that you flag as Connections within Insights.

You can expand your network with Connections and increase the likelihood of finding contacts who can help you reach your target account.

Privacy Statement

Sometimes Insights users are hesitant to add their connections because they feel like they will be adding them to the Insights database and thus subjecting their contacts to a barrage of sales calls. But that isn't how the Connections feature works.

When you add your connections in Insights, NOTHING gets added to the database unless you explicitly request it. InsideView Insights was designed with your privacy concerns in mind.

How it works

- You provide us your contact list from Gmail, Google, Outlook or LinkedIn.
- Insights matches your contacts against the executives in the database. If your contacts exist, Insights creates a link to review the information in the "People You Know" tab.
- If any of your contacts do not exist in the database, Insights does not add those people in the database because that would be a violation of your privacy rights.

You can use any or all of the following categories to set up your connections in Insights and connect with target companies and contacts:

- **Current Employer** view connections from the company where you are currently working who can act as referrals.
- **Education** enter the names of all the colleges and universities you have attended to find referrals through your fellow alumni.
- **People You Know** import your contacts from LinkedIn, Gmail, and Outlook to identify connections and find referrals to a company or specific person through the people you know.
- **Work History** enter the companies that you've worked for to identify connections and find referrals to your prospects through your previous employers and co-workers.
- **Reference Customers** add satisfied customers who would be willing to provide you with a testimonial or an introduction to people in their professional network. These reference customers are like your personal reference customers added by you.

- **Company Reference Customers** add satisfied customers who would be willing to provide you with a testimonial or an introduction to people in their professional network. The company reference customers is available only to users who have purchased Insights Enterprise license directly from InsideView. The company reference customers are assigned to your account by an InsideView's customer success manager (CSM).

Add connections from your previous employers

1. Go to the **People You Know** page, and then click the **Work History** button or the **Work History** subtab.

2. On the **Work History** subtab, enter information in the following boxes:

    - Start typing the name of your company and select the complete name from the list of suggestions for company names.
    - Add the Job Title
    - Add the Duration

3. Click **Save**.

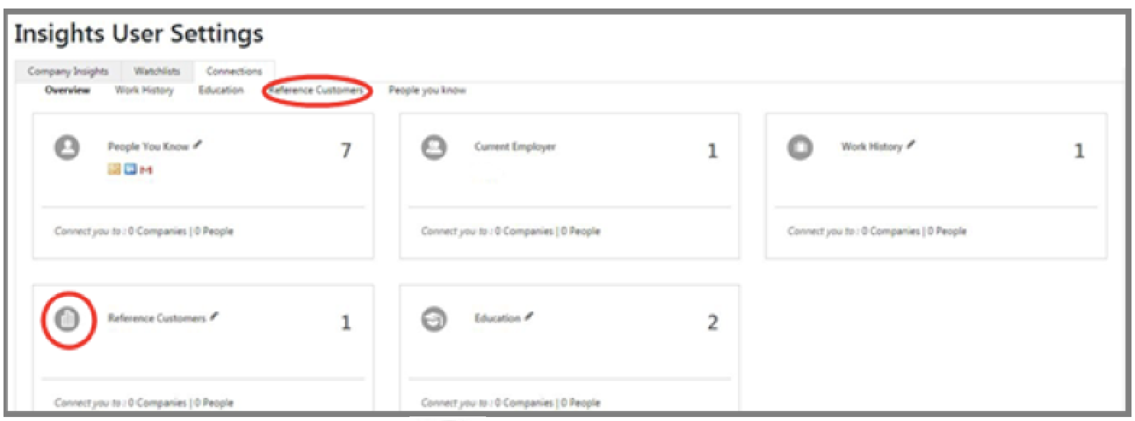
Add connections from colleges or universities

1. Go to the **People You Know** page, and then click the **Education** button or the **Education** subtab.

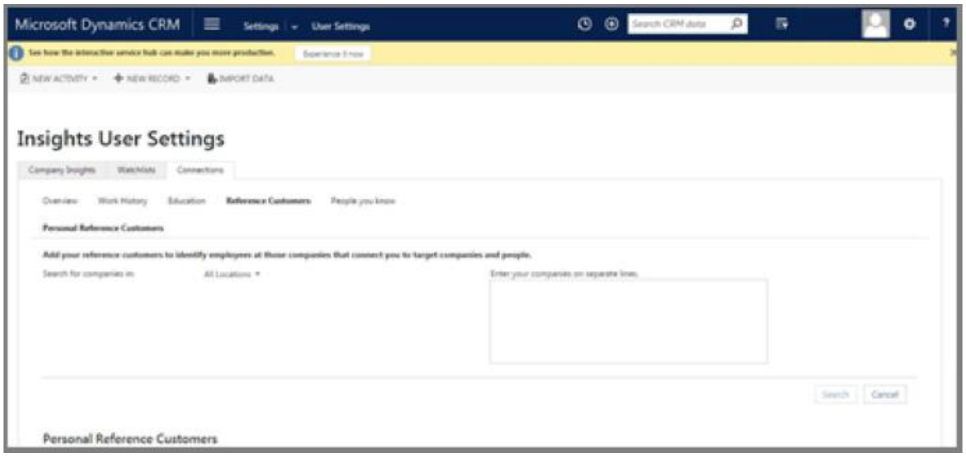
2. On the **Education** subtab, enter information in the following boxes:
   - Start typing the name of your college or university and select the complete name from the list of suggestions for school names.
   - Add the Degree name
   - Add the Duration
3. Click **Add**.

Add your Personal Reference Customers

1. Go to the User Settings page, and then select the **Connections** tab.



2. On the **Overview** tab, click the  **Reference Customers** button or click the **Reference Customers** subtab.



3. In the **Reference Customers** page, select the appropriate location from the drop-down menu and specify the company names on separate lines.

   Company Reference customers are satisfied customers who would be willing to provide you with a testimonial or an introduction to people in their professional network.

4. Click **Search**.

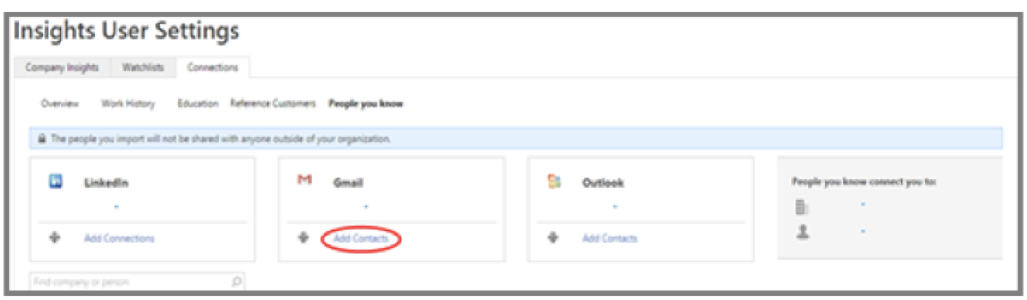
5. From the Search result, select the name of the company and click **Add Reference Customers** to add them for reference. Insights will add these companies to your Reference Account list.

   InsideView Insights provides you with an opportunity to create reference accounts which all of your Insights users can leverage. Once you identify a prospect, ask your connections for a referral.

Add your Gmail contacts

1. Go to the User Settings page, and then select the **Connections** tab.

2. On the **Overview** tab, click the **People You Know** button  or click the **People You Know** subtab.



3. To add Gmail contacts, on the **People You Know** subtab, under Gmail, click **Add Contacts**.

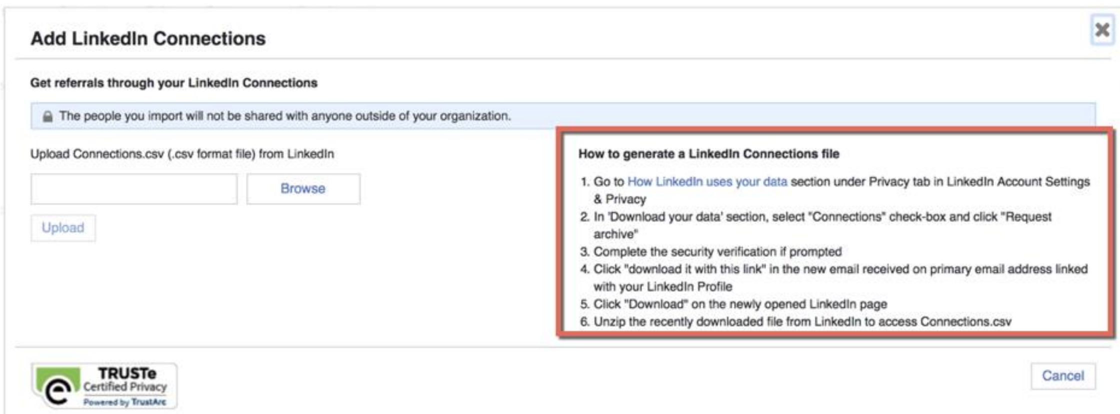
   Note: Only the contacts in your Gmail address book will be added.
4. On the Gmail login page, enter your username and password, and then click **Accept**.

5. When the import is completed, you can see the names of all the Gmail contacts who were added to your connections. Other contacts that from whom you have received emails from or sent emails to will not be added.

6. Click **Close**.

Add your LinkedIn Connections

1. Go to the **People You Know** tab, and then select **Add Connections** in the **LinkedIn** box.

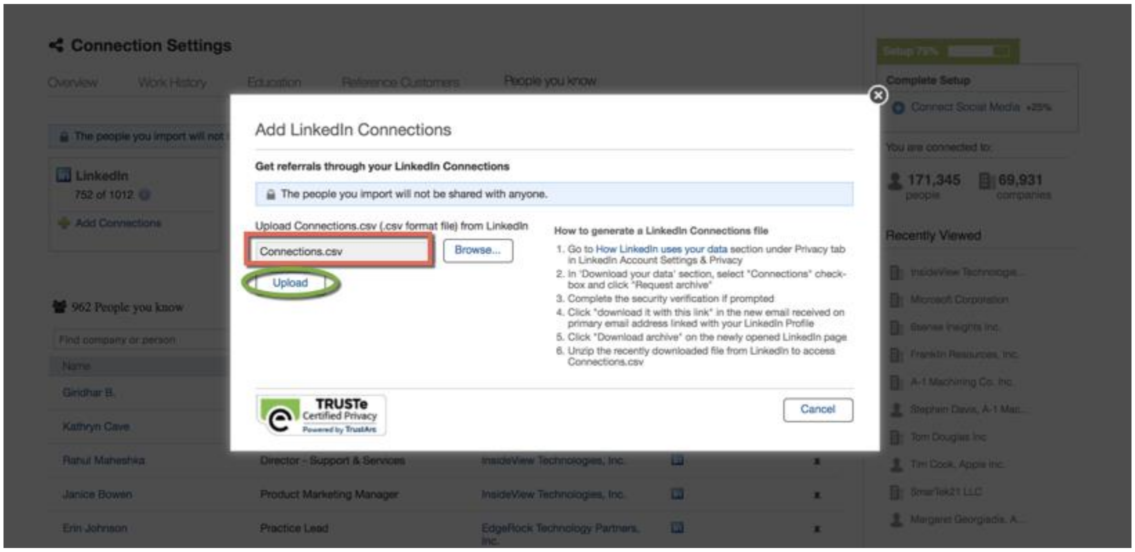


2. Follow the instructions in the **How to generate a LinkedIn Connections File** window to get an archive of your **LinkedIn Connections**.

3. Extract only the **Connections.csv** file from the **Basic_LinkedInDataExport_Date.zip** that you have downloaded from the LinkedIn Basic Account Settings page.

4. To import LinkedIn connections, on the **People You Know** tab, under LinkedIn, click **Add Connections**.

5. Click **Browse** and select the **Connections.csv** file with your contacts that you just downloaded.



6. Click **Upload**.

Add your Outlook contacts

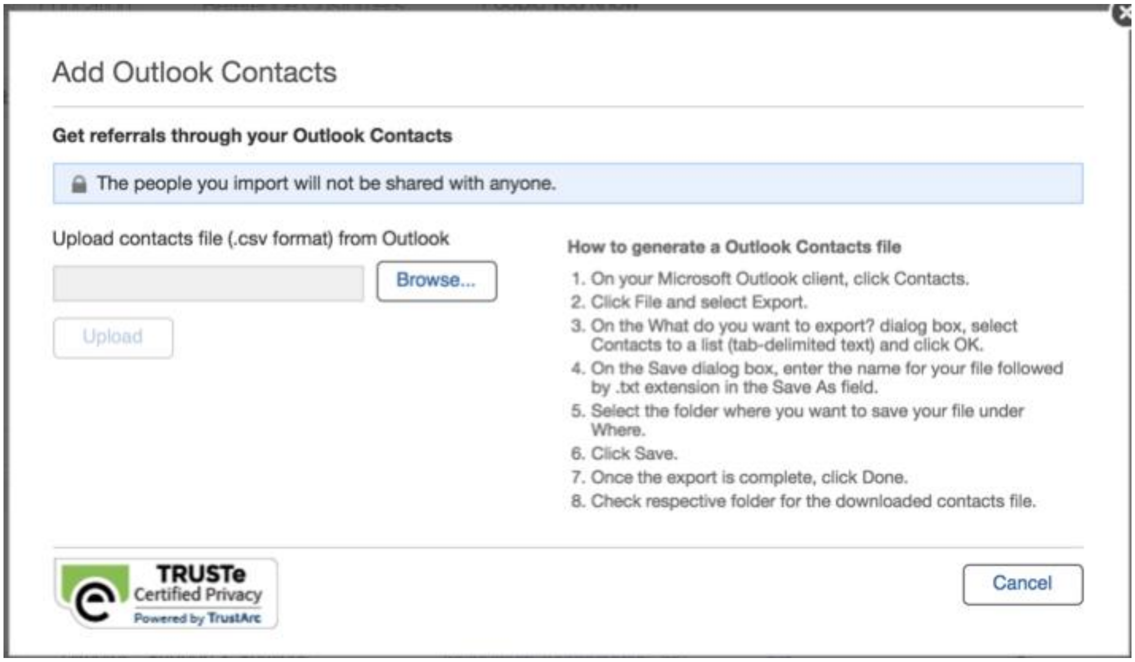
You can import contacts saved in your personal Outlook Address book. Note that you will not be able to import all the contacts from your company's Active Directory.

For Microsoft Outlook PC users:

Go to Microsoft Outlook and use the following steps to create an outlook.csv file with your contacts:

1. On your Microsoft Outlook client, click **Contacts**.
2. Click **File** and select **Export**.
3. On the What do you want to export? dialog box, select **Contacts** to a list (tab-delimited text) and click **OK**.
4. On the **Save** dialog box, enter the name for your file followed by .txt extension in the Save As field.
5. Select the folder where you want to save your file under **Where**.
6. Click **Save**.
7. Once the export is complete, click **Done**.
8. Check respective folder for the downloaded contacts file.

To import the Outlook contacts, go to the Connection Settings page, and then click the **People You Know** tab.



1. On the **People You Know** tab, under Outlook, click **Add Contacts**.
2. Click **Browse,** and then select the Microsoft Excel file that has your contacts.
3. Click **Upload**. To remove any contact from the list, click the **Close** button next to the contact's name.
4. Click **Save**.

For Microsoft Outlook 2011 Mac users:

You can export contact list in Outlook 2011 on Apple's Mac operating system to an Excel spreadsheet. Here's how:

Export from Outlook for Mac

1. Open Outlook for Mac and click on **Contacts**.
2. From the **File** menu, choose **Export**.
3. A dialog box pops up, asking you **What do you want to export?** Choose **Contacts** to a list (tab-delimited text). Then click the right arrow at the bottom.
4. A **Save** box appears. In the **Save As** field, enter the name you want to give your file. Make sure the **.txt** extension is at the end of your file name. Under **Where** choose your desktop.
5. Then click the **Save** button.
6. Outlook then exports your contacts. When the export is complete, click the **Done** button.

Import to Excel

1. Open Microsoft Excel.
2. From the **File** menu, choose **Open**…
3. When the **Open** box appears, go to the bottom of the box and under **Enable** make sure it's set to **All Readable Documents** then in the top part of the window, find the **.txt** file you exported from Outlook to your desktop, and choose it. Then click the **Open** button.
4. The Text Import Wizard opens up. Choose **Delimited** and click **Finish**. Your contacts open up in an Excel spreadsheet.
5. Save it as **Excel** by going to the **File** menu and choosing **Save As**; under **Format** choose Excel Workbook.

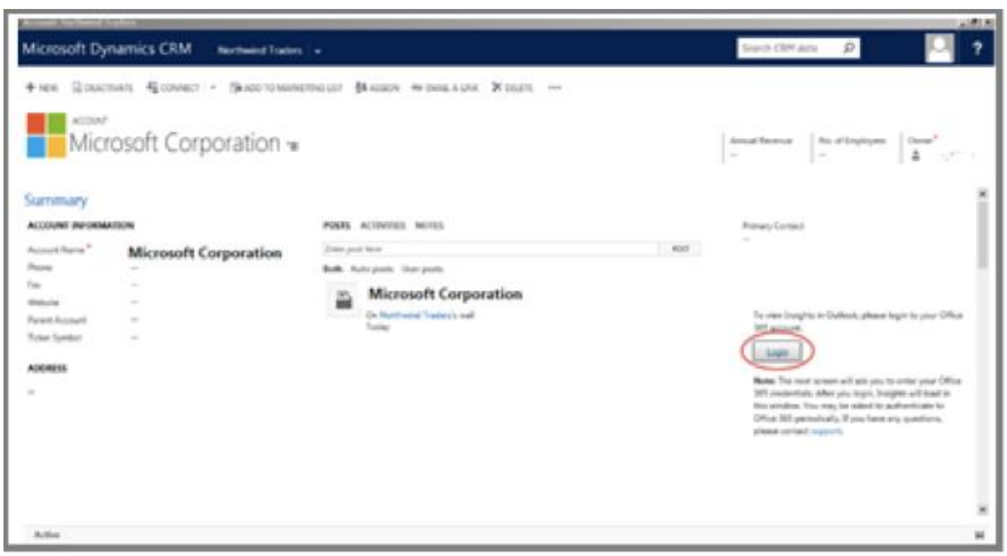
   Note: You cannot export Contacts for Microsoft Outlook 2016 on Mac

Follow the steps to import the Outlook Contacts in the Connections Settings page as described in this section above.

Get to InsideView Insights through Outlook

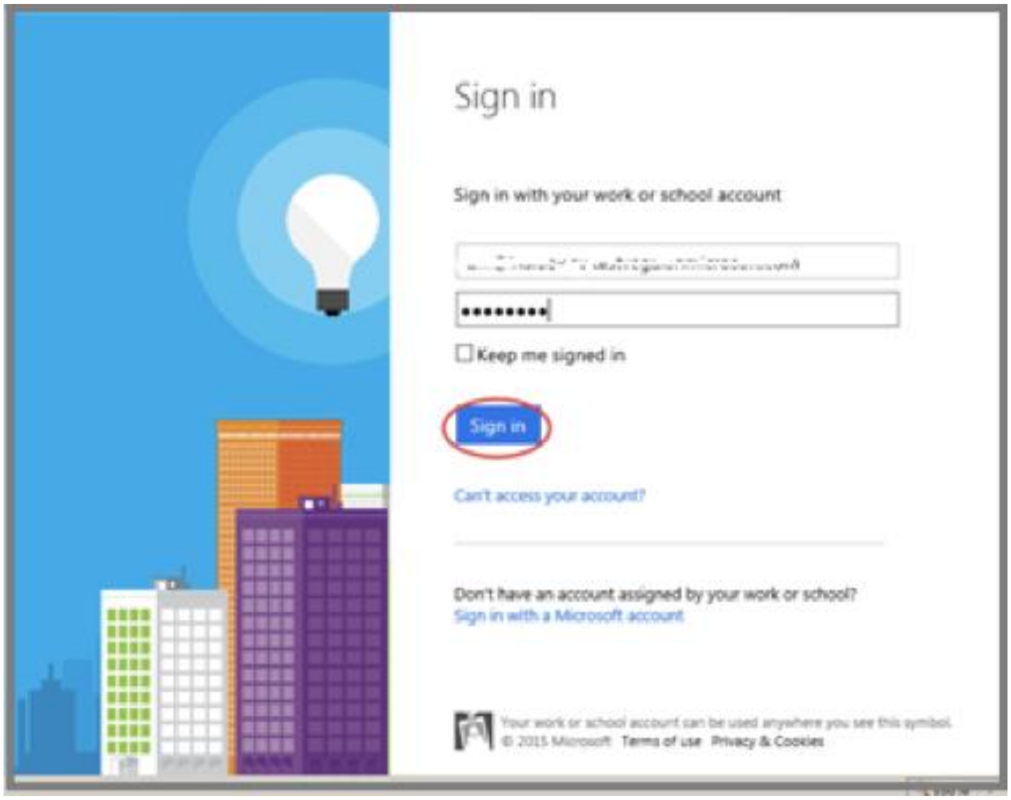
You can access Insights through the Outlook client at the individual user level.

1. Open any account, lead, contact or opportunity record in CRM or Dynamics 365 from your Outlook client to load that entity in a new window.

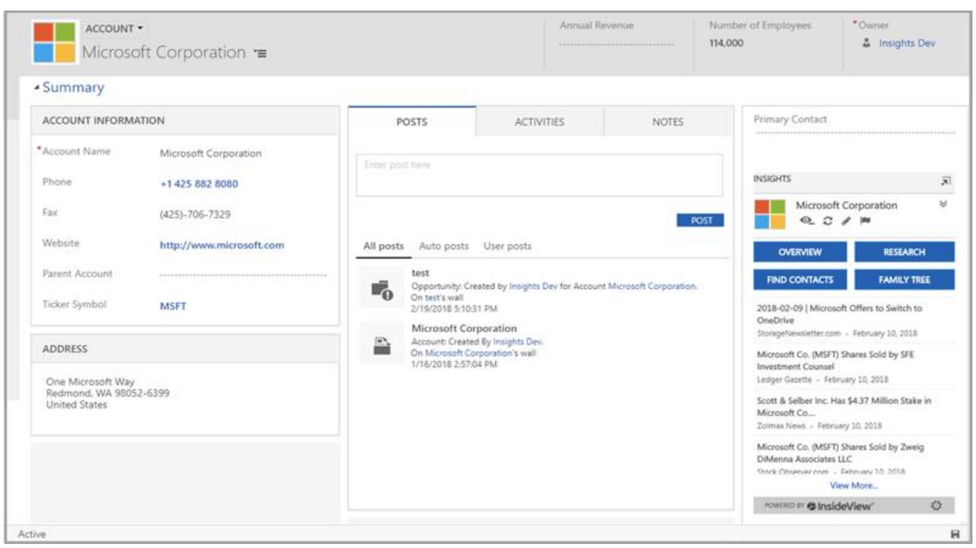


2. Click **Login**.

3. Enter your Microsoft Dynamics 365 account credentials, and then click **Sign in**.



4. After successfully signing in, the page refreshes. If the administrator has already granted access to all users in the organization, the Insights view opens directly.



Note: If the administrator has NOT granted access to Insights, then we recommend you to refer to the section “Making InsideView Insights available through the Dynamics CRM 365 Web Client” in the *InsideView Insights Installation Guide*.

Accessibility Enhancements

InsideView Insights supports the following accessibility features to allow users with visual impairment to use Insights more efficiently:

- Keyboard navigation
- Screen reader
- Higher contrast
- Hover help text

Insights supports only the *Non-Visual Desktop Access* (NVDA), *VoiceOver* (only available in Macintosh) and *ChromeVox* screen readers. The Higher Contrast feature is supported as per Microsoft's accessibility guidelines.

Known Issues

These enhancements have some limitations in Dynamics 365.

- Keyboard navigation is NOT supported for drag and drop and hover buttons.
- Screen Reader with NVDA is NOT supported for dropdown menu selections because they are intermittently not selectable. Each screen reader will read out the button label differently as per their own accessibility standards. For this reason, the button labels might NOT read out as expected.