

dun & bradstreet

EconoVue Training for State of California

Connecting with Businesses



Review:

- Importing Businesses into My Lists
- Assigning a Filter Tag

Record Management

- Deleting Record
- Filter tags

List Management

- Deleting Records From My List Database
- Assigning Filter Tag to “No Filter Tag Assigned”
- Assigning More Than One Filter Tag to Records
- Editing Filter Tags
- Removing Filter Tags
- Filter Tag naming conventions

econovue Management of 'My Lists' – Record View

The screenshot displays the Econovue 'My Lists' Record View interface. The top navigation bar includes 'regionvue', 'localvue', and 'prospectvue', along with a user login status for Cheryl Parker. The main interface is divided into several sections:

- Search and My Lists:** Includes tabs for 'Search', 'My Lists', and 'Import Spreadsheet'. Below these are sub-tabs for 'Companies', 'Contacts', 'Comments', and 'Schedule'. A search bar is present with the text 'search term + enter'.
- Filters and List:** A section titled 'Filters: None Selected' with a dropdown menu. Below this is a list of records. The first record is 'Aat Bioquest, Inc.' with 1 contact. The second record is 'Abound Logic, Inc.' with 3 contacts, highlighted with a red circle around its 'Edit Record' and 'Remove from List' buttons. The third record is 'Adesto' with 1 contact. The fourth record is 'Adeza Biomedical Corporation' with 1 contact.
- Map Layer:** A dropdown menu set to 'Santa Clara County' is positioned above a map of the region. The map shows various locations like Novato, Vallejo, Stockton, and Santa Cruz.
- Record View:** A detailed view for 'Abound Logic, Inc.' is shown, including contact information (408-873-3400), address (19200 Stevens Creek Blvd, Cupertino CA, 95014), and filters (Medium Risk - Gyms). This view also has 'Edit Record' and 'Remove from List' buttons highlighted with red circles.

econovue Management of 'My Lists' – List View

regionvue localvue prospectvue log out | Cheryl Parker is logged in | Account Activity | Help Center

Search My Lists Import Spreadsheet

County Map Layer City/zip

Contacts Comments Schedule

Companies

Fetch all regions/records

Export/Import List

Filters: None Selected

search term + enter

1 2 3 - 29

Records: 1 - 5 of 144 | Page 1 of 29

Aat Bioquest, Inc.
Sunnyvale
Number of Contacts: 1
Filters: Biotech

Abound Logic, Inc.
Cupertino
Number of Contacts: 3
Filters: Medium Risk - Gyms

Adesto
Santa Clara
Number of Contacts: 1
Filters: Medium Risk - MFG Semicond...

Adeza Biomedical Corporation
Sunnyvale
Number of Contacts: 1
Filters: Biotech

Export/Delete/Edit List Dialog

- [Export to Spreadsheet](#)
- [Delete records from database](#)
- [Edit Filter Tags: Assign, Create, Edit, Remove](#)

Close

Create a naming system that makes sense for you (and your team, if applicable) by determining how you will be using your saved lists. Examples:

- 5.18.19 Reg1 At-Risk Construction
- 5.18.19 Reg1 At-Risk Financial
- 5.25.19 Reg2 At-Risk Retail
- 5.25.19 Reg2 At-Risk Retail

Layoff Aversion

Filtered for:
At-Risk companies

- Reg2: FS Med, MC growing
- Reg1: 10+, FS Low, MC growing
- Reg2: All sizes, FS Low/Med, Stable
- Reg2: FS Med, MC growing

Business Engagement

Filtered for:
High-Growth companies

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