INSIGHTS, POWERED BY INSIDEVIEW

User Guide

Product Version 4.0.1

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Chapter 1: Introduction to Insights, powered by InsideView

Insights, powered by InsideView for Dynamics 365 and Dynamics CRM Online helps you find more leads, win more deals, grow your business and retain your accounts. It infuses Dynamics 365 and CRM Online 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.

Note: Throughout this document, you will find the word "Insights." Most of the time it refers to the solution, Insights, powered by InsideView. 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.

Insights, powered by InsideView provides five key elements that can help you win more deals:

- **Insights**, which include current company news, key business events, and social buzz, helping you to prepare for sales calls with articles from mainstream media, industry-specific publications, and regulatory filings.
- **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 about a company even if that company is not in Dynamics 365 or your CRM as an account entity. You can view the firmographic data, key contacts and company news. You can also add a company to Dynamics 365 or your CRM or to a Watchlist from the search results. The Discovery Center also provides an intuitive "Activity Stream" that tracks and displays various activities that any user completes on the go.
- **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 Insights, powered by InsideView. 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.

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

What's New in this Release?

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

- **Reimagined User Experience**: New native design and navigational paradigm.
- **User** and **Organizational Preferences**: Setup your preferences within the context of Microsoft Dynamics 365 or CRM.
- **Custom Field Mapping**: Setup how information flows between Insights and Microsoft Dynamics 365 or Dynamics CRM Online.
- **Social Feed Suppression**: Disable social media integration for all users in your organization.
- **Find Contacts**: Add multiple people as contacts, leads, or to lists.
- **Personalization**: Customize how you consume social media streams by leveraging drag and drop functionality.
- **Discovery Center**: Search and find new companies.
- **Family Tree**: Discover subsidiaries, acquisitions, and international divisions.
- **Tech Profiler**: Get a quick snapshot of company's technology profiles.

Getting to Insights, powered by InsideView

Insights provides contextual information within Dynamics 365 and CRM Online. 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.

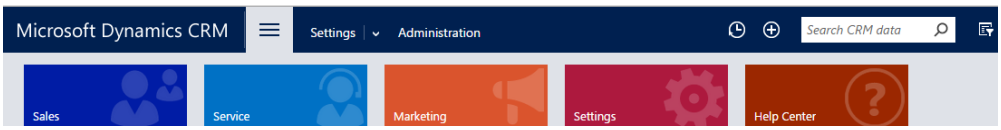
You can get to Insights application in Dynamics 365 and CRM Online from the following entities: accounts, leads, contacts, and opportunities.

> **Important Note**: Insights, powered by InsideView is a third party application, which is designed to be accessed only within the Account, Contact, Lead and Opportunity entities.
>
> If you launch Insights, powered by InsideView 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.

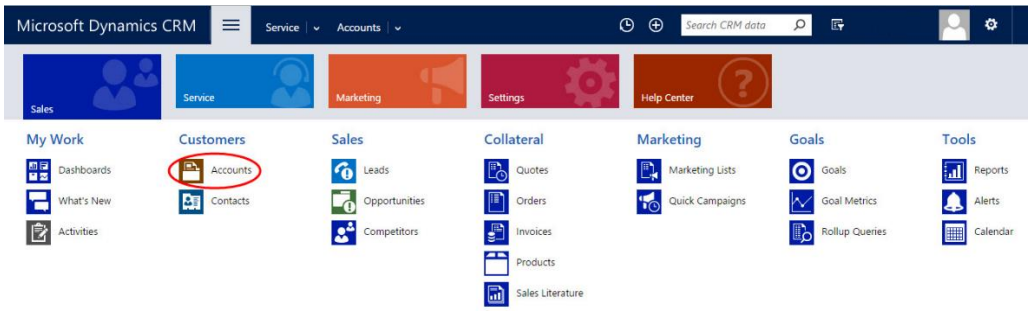
Accounts

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

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

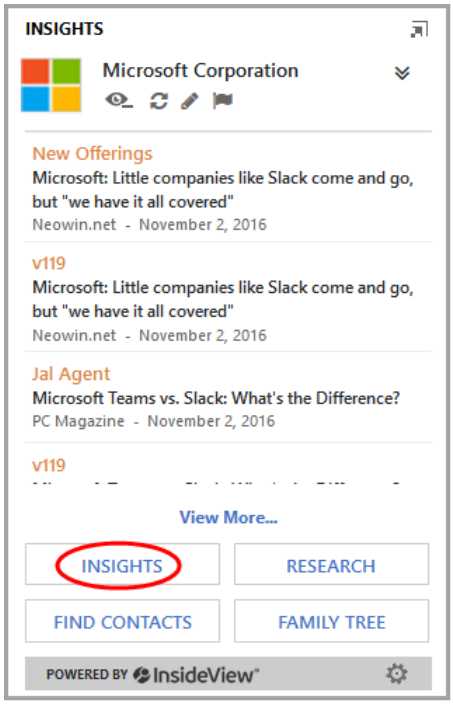


3. Click the work area name, and then click **Accounts**.



4. Open an account.

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

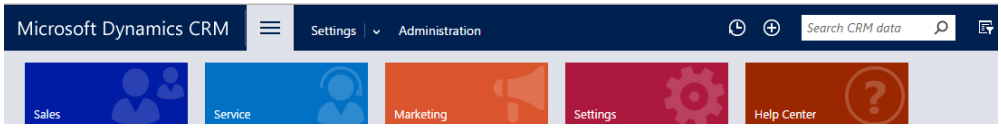


6. Click the **Insights** button to view the company's information.

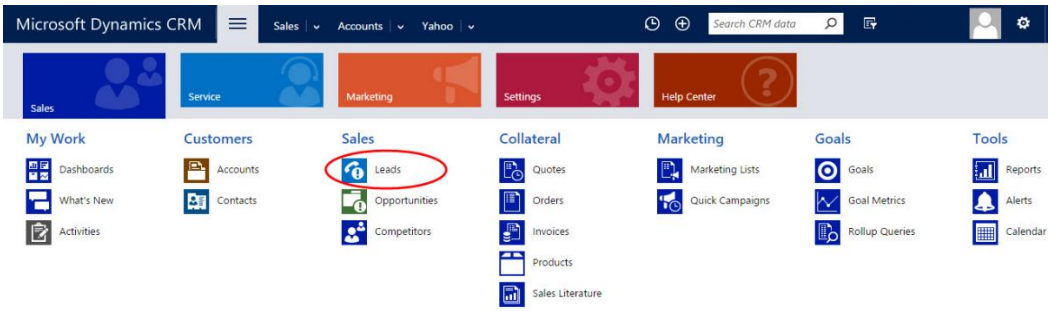
Leads

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

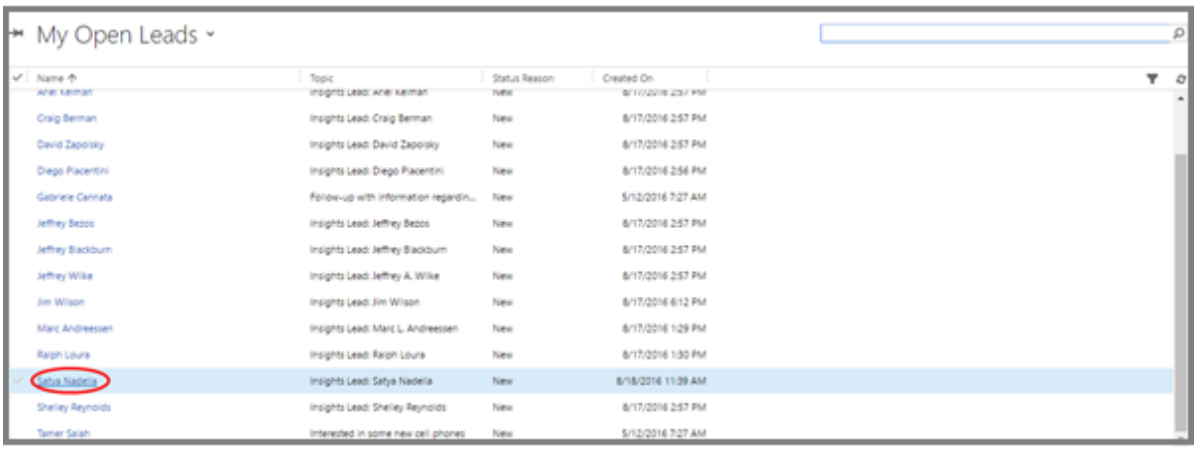
2. Go to the **Sales**, **Service**, or **Marketing** work area.



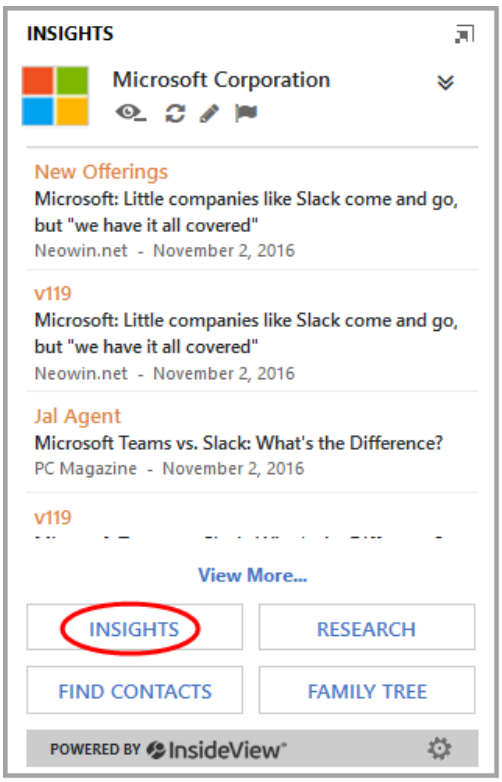
3. Click the work area name, and then click **Leads**.



4. Open a lead.



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

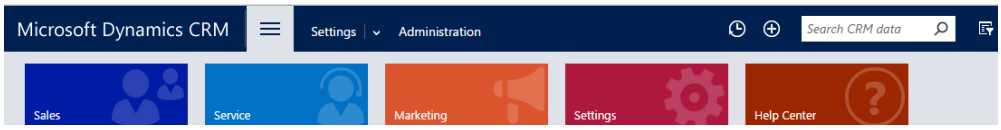


6. Click the **Insights** button to view the company's information.

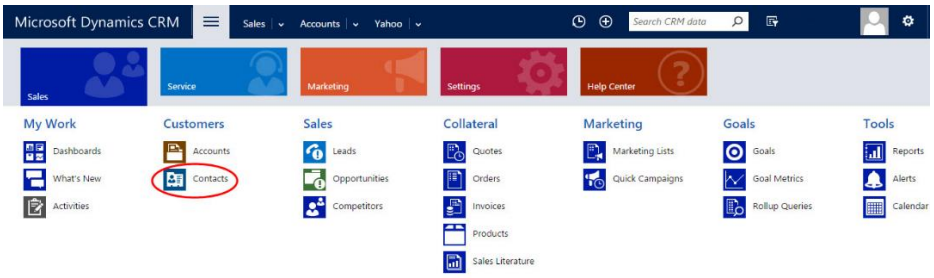
Contacts

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

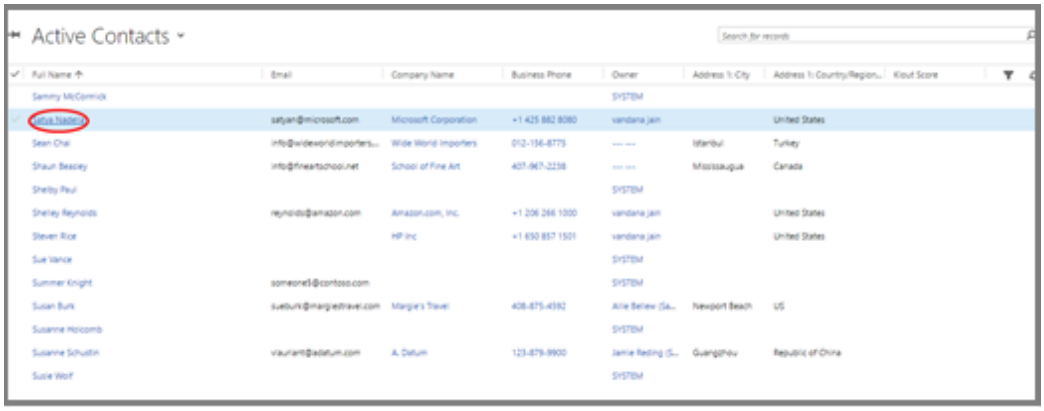
2. Go to the select **Sales**, **Service**, or **Marketing** work area.



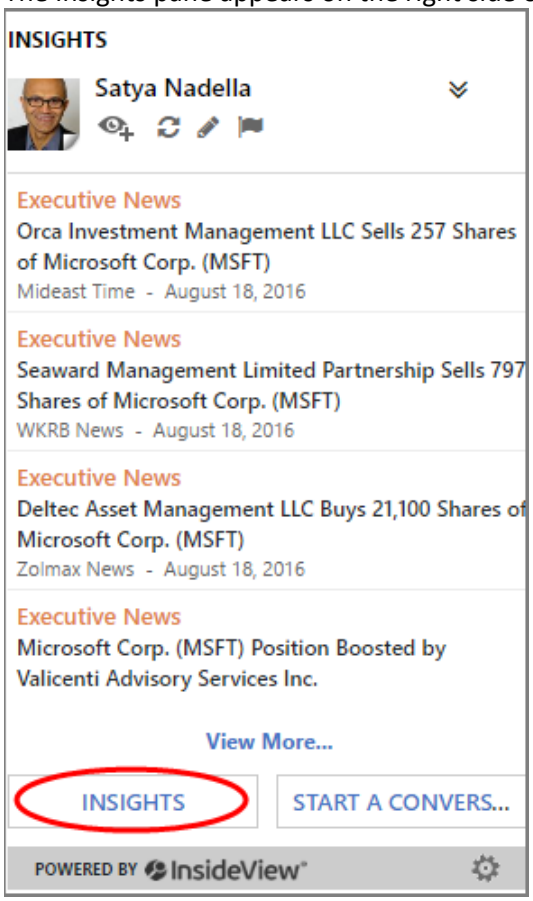
3. Click the work area name, and then click **Contacts**.



4. Open a contact.



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

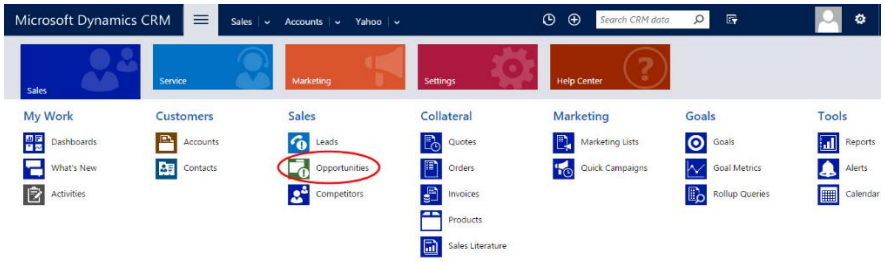


6. Click the **Insights** button to open the contact information.

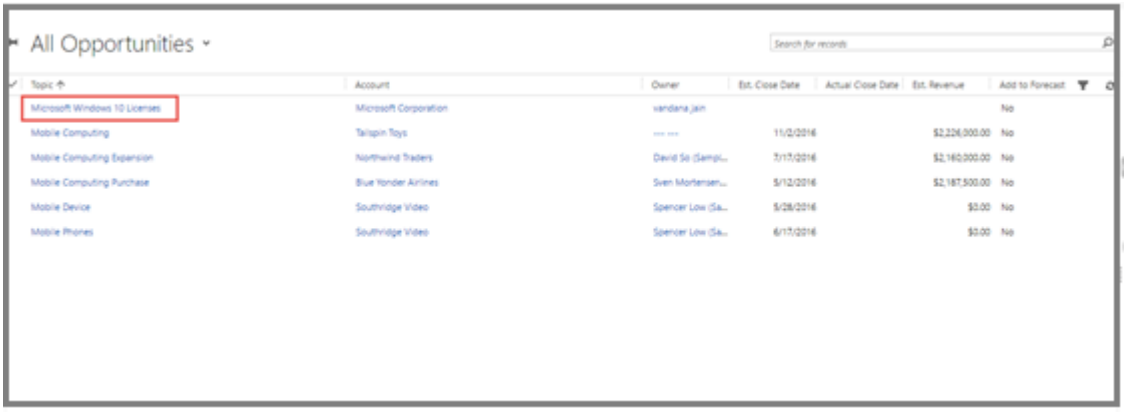
Opportunities

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

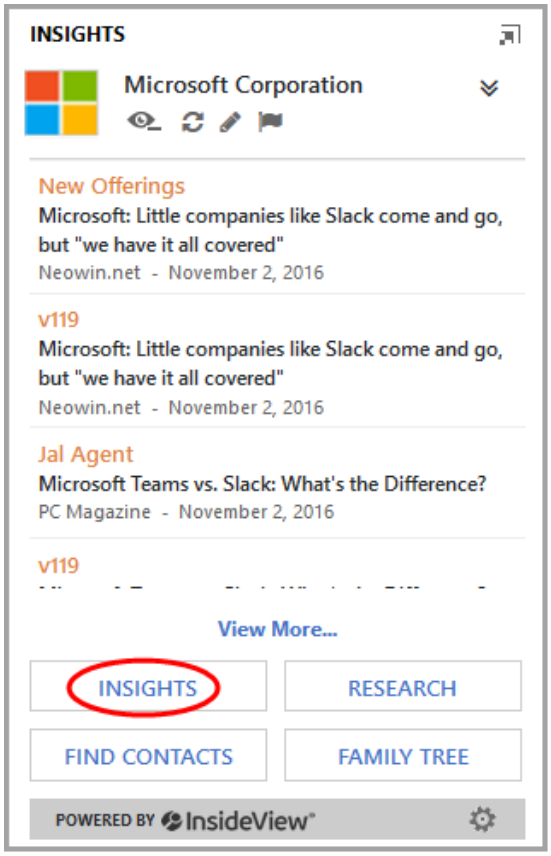
2. Select the **Sales** work area, and then click **Opportunities**.



3. Open an opportunity.



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



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

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.

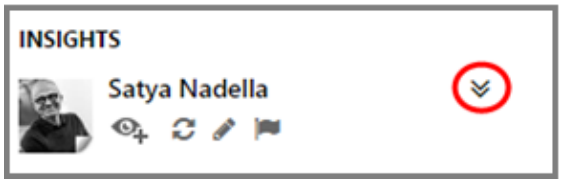
Company

Contact

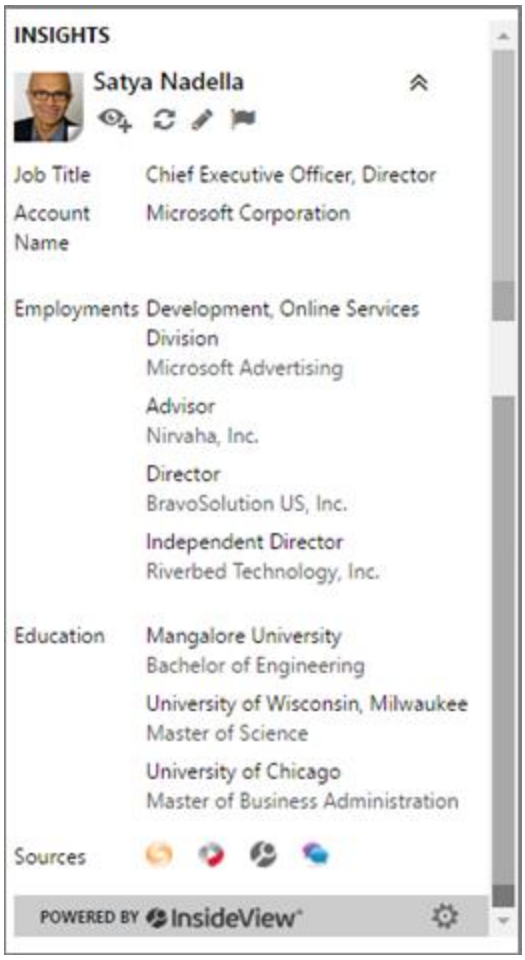
View company or contact firmographic data

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.

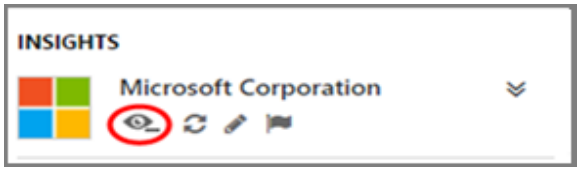
Add a company or a contact to a Watchlist

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.



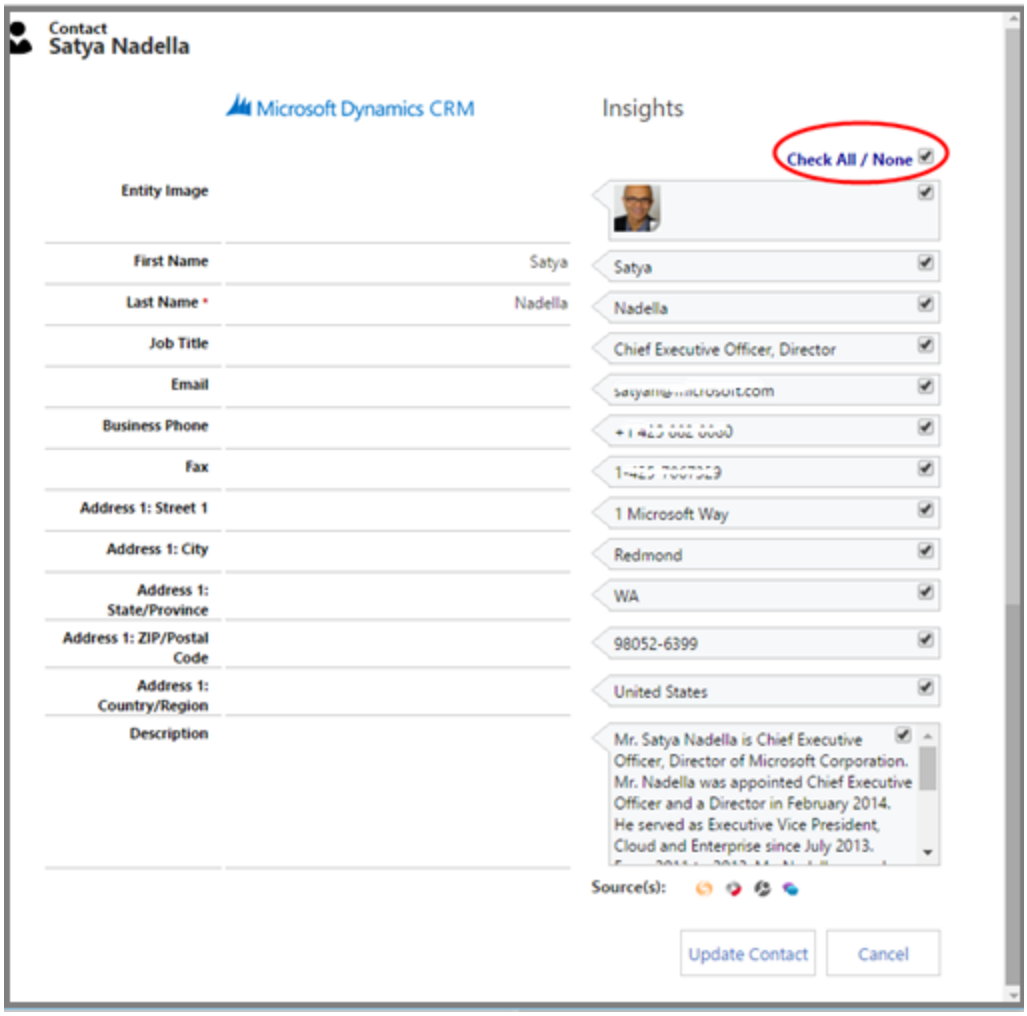
Update (sync) account or contact information

Insights allows you to synchronize company and contact information to Dynamics 365 and Dynamics CRM Online 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.

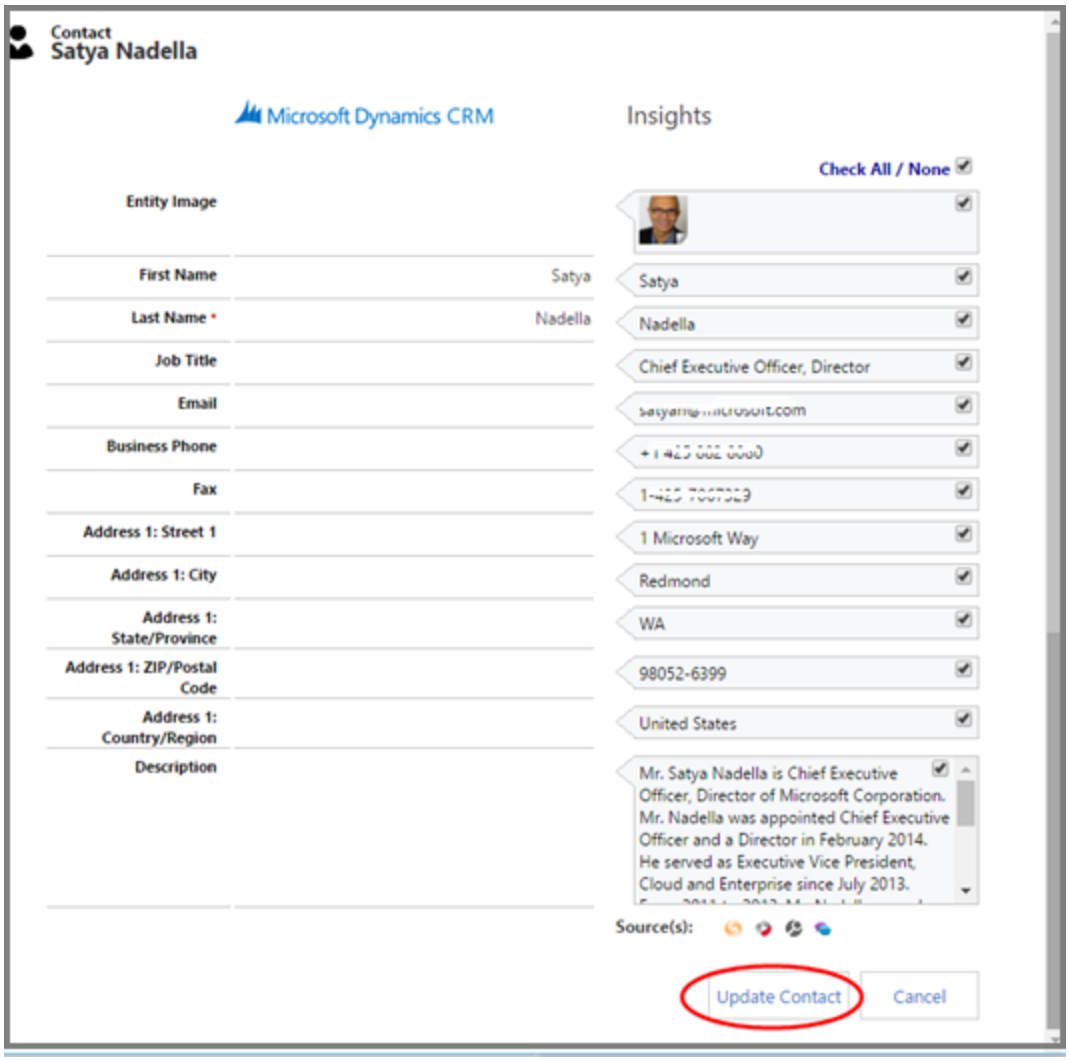
2. In the Contact or Account dialog box, in the **Insights** area, select the check box by an individual field to modify that field or click **Check All** to enable all fields for editing.

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.



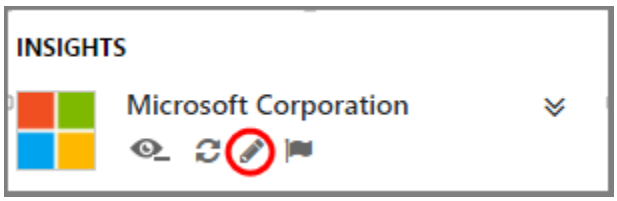
5. Click **Cancel** to go back to the Contact Details or Account Details page.

Edit incorrect company or contact Data

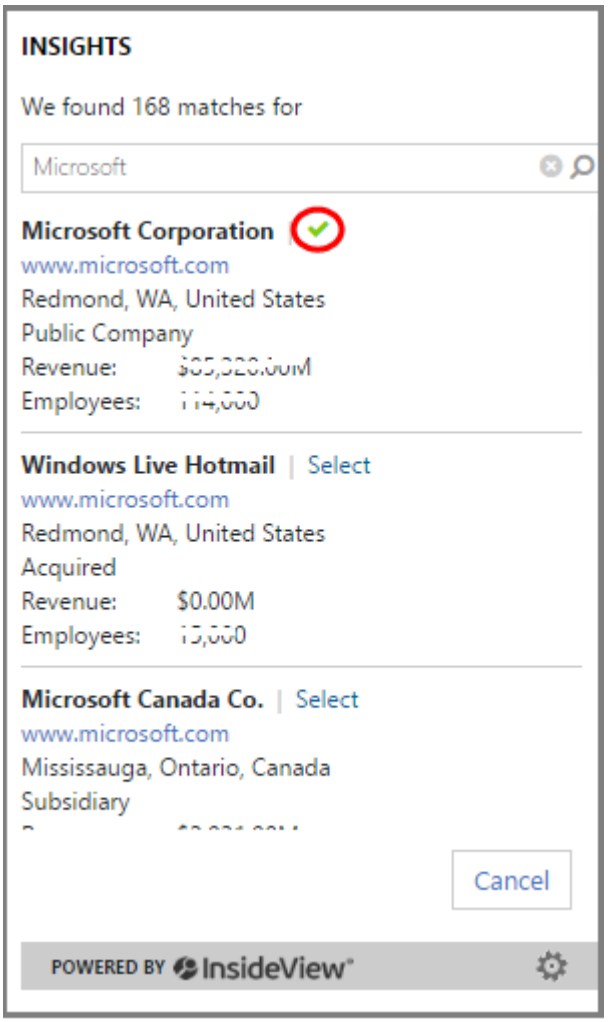
The **Incorrect Company?** or **Incorrect Contact?** button allows you to edit incorrect company or contact information by letting you select the correct information from a list of matches in the Insights database.

Edit incorrect company data

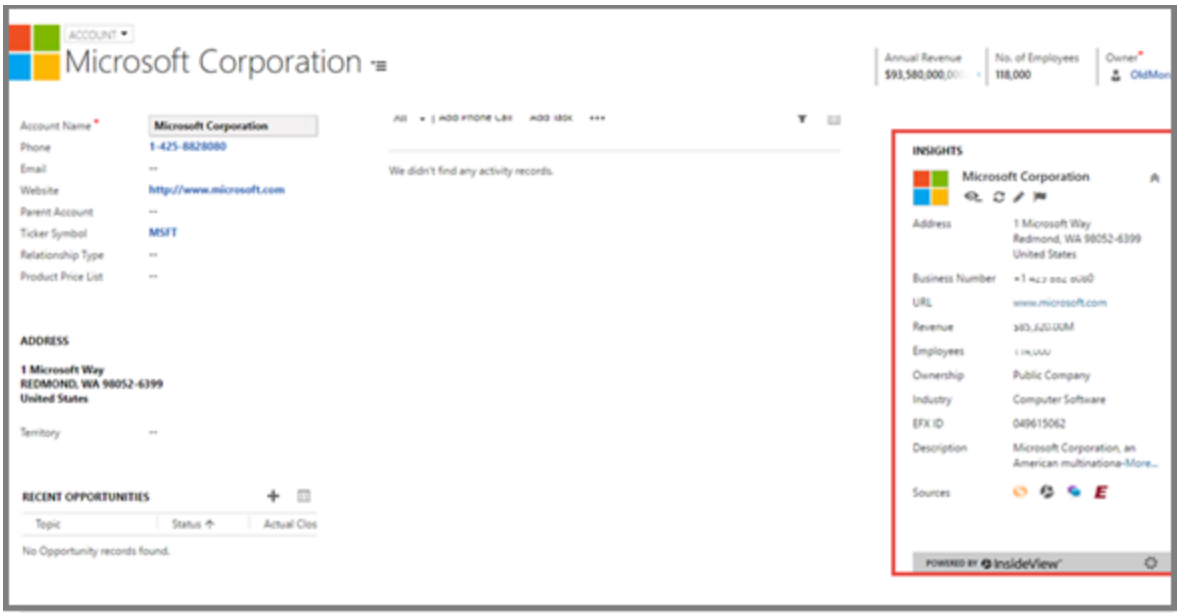
1. Go to the Company Details page for the incorrect company, and then click the **Incorrect Company?** button.



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 or CRM Online.

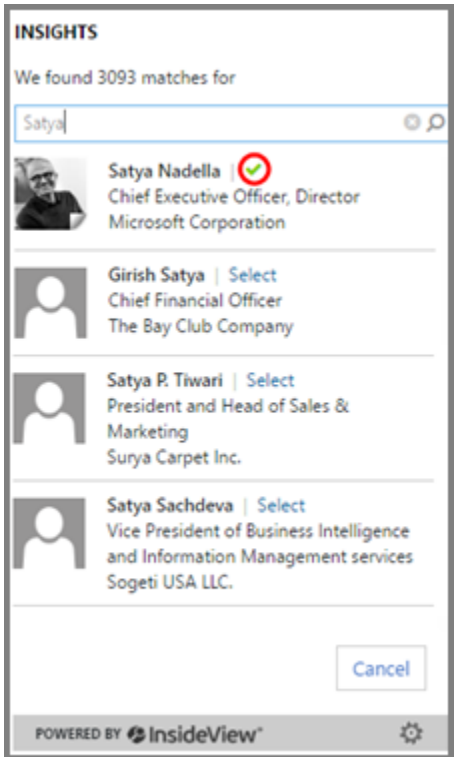


When you select the company from the list, the firmographic data appears in the Insights pane.

Edit incorrect contact data

1. Go to the Company Details page that has the incorrect contact, and then click the **Incorrect Contact?** button.

2. Select the correct contact.



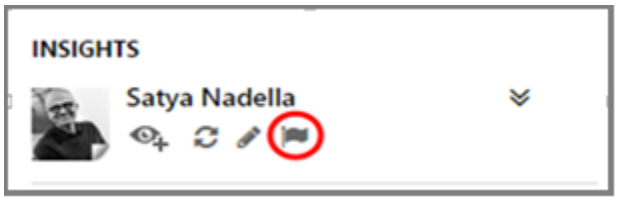
Report incorrect company or contact information

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

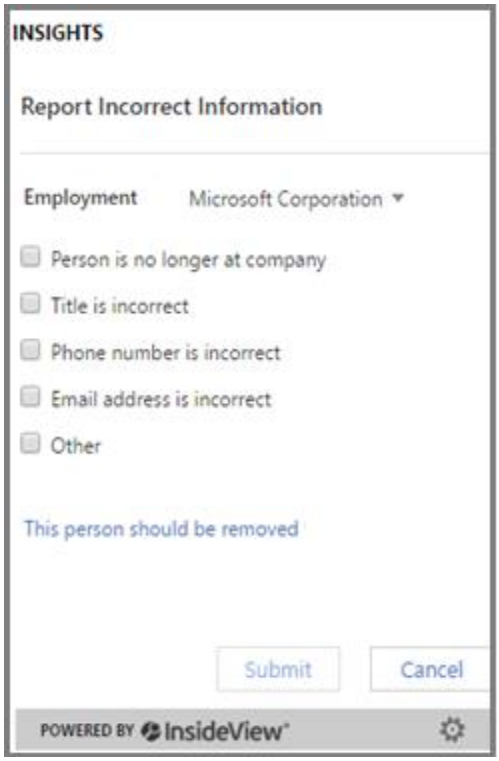
Note: When you report company or contact information, the data in question is sent to a dedicated content engineering team for careful evaluation and research. If the information in Insights is incorrect, the content team will validate the data and update the information accordingly.

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.

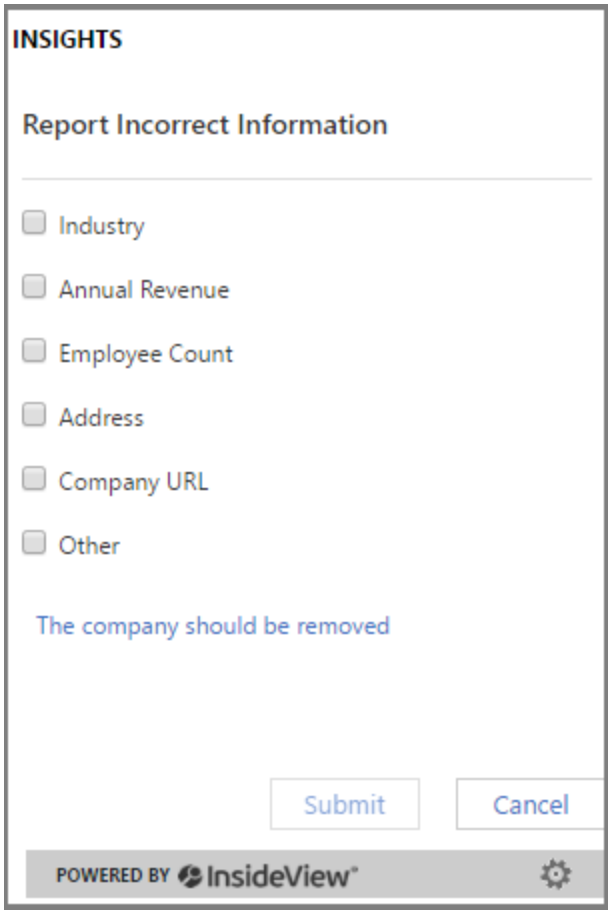
4. When prompted, provide the reason you believe the contact should be removed.

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.

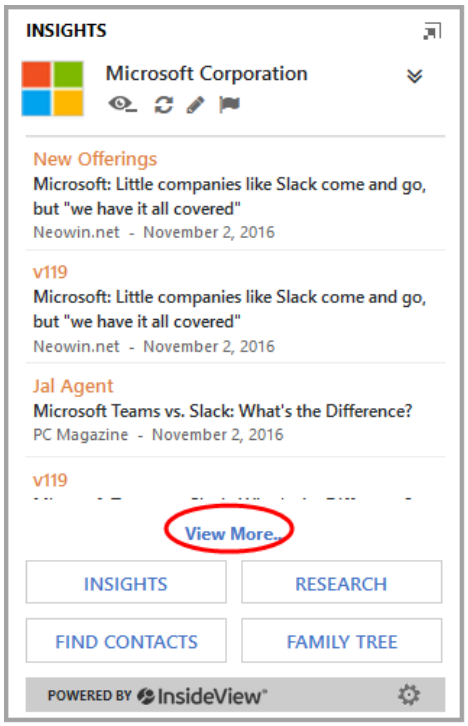
5. Click **Submit**.

View company or contact news

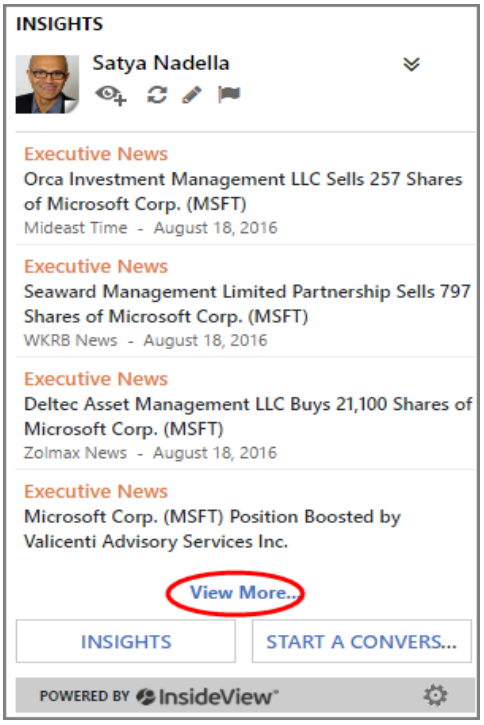
Insights, powered by InsideView lets you view the latest company and contact news feeds, which are updated at regular interval, in Insights. Here's how:

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

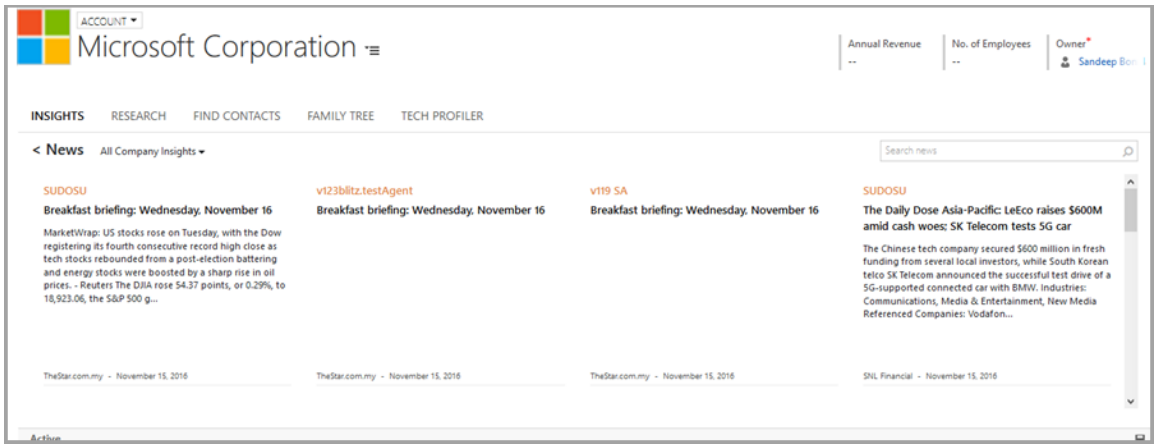
Company



Contact



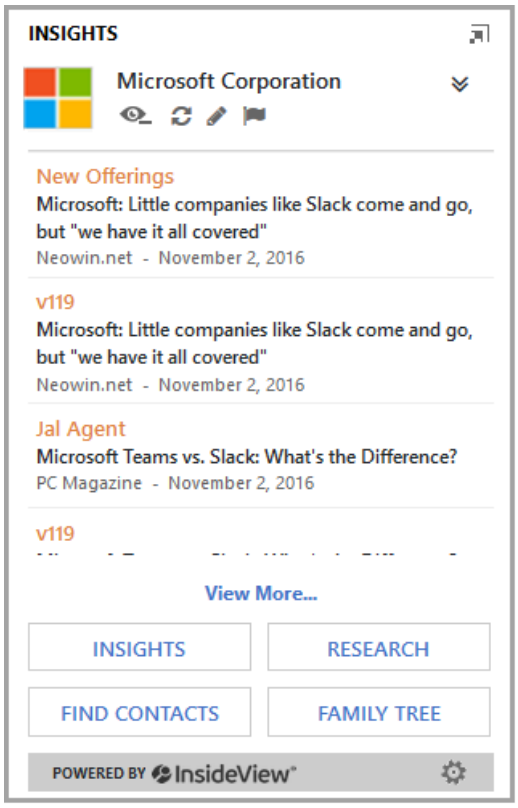
2. The News page opens.



Insights user actions

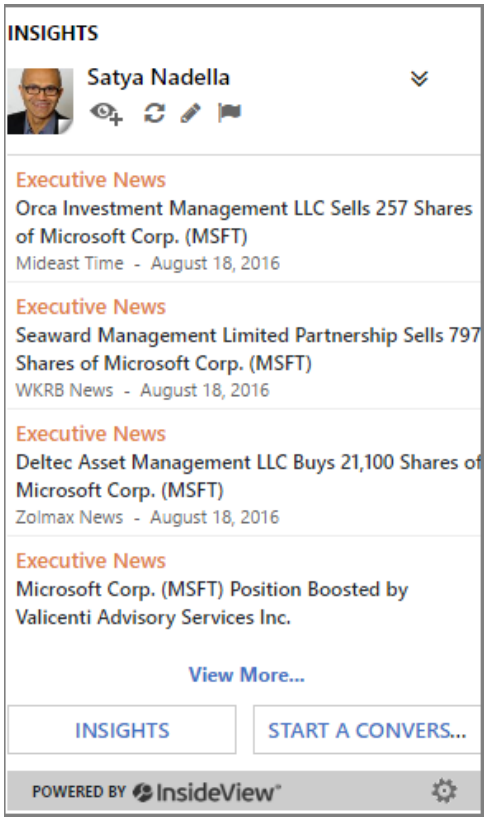
Insights provides buttons to view Insights, Research, and Find Contacts. Here's how you can use these buttons:

1. Go to the Company Details page.



2. Use these buttons as described here:
   - **Insights** to view a company's news, key contacts, and social media buzz.
   - **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.

3. Open the **Insights** tab for a contact.



4. Use these buttons as described here:
    - **Insights** to view a company's news, key contacts, and social media buzz.
    - **Start a conversation** to view the contact's demographic information, connections, blog and social media feeds.
    - **View More** to view the news about the contact.

Chapter 2: Insights tab

This chapter helps you understand the **Insights** tab and how you can use the information on the different subtabs for business conversations.

Understanding the Insights tab

Use the **Insights** tab to learn more about your target companies and contacts, and plan effective sales strategies. Insights, powered by InsideView 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 Insights 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 360-degree profiles and real-time updates from LinkedIn, Twitter, corporate blogs and other social media.
- Follow key people at top prospects and get alerts when they change jobs, get promoted, have a social update or are in the news.
- 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 Insights tab includes three types of information. Each gives you a different perspective and information about a company and a contact.

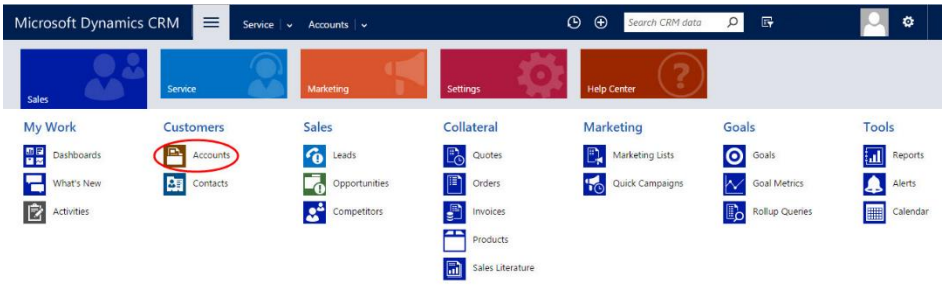
- News
- Key Contacts
- Buzz

Getting to company and contact insights

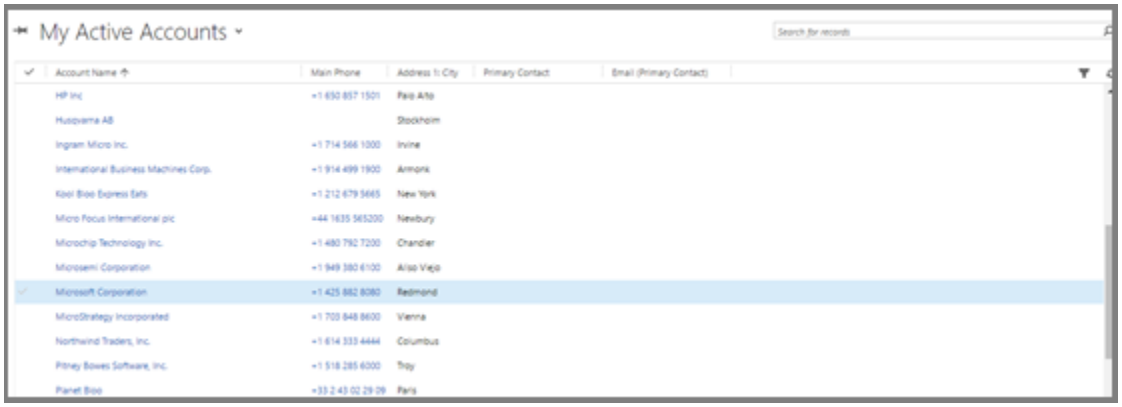
The **Insights** tab on a company and contact entity lets you view the latest news and important events.

Find company insights

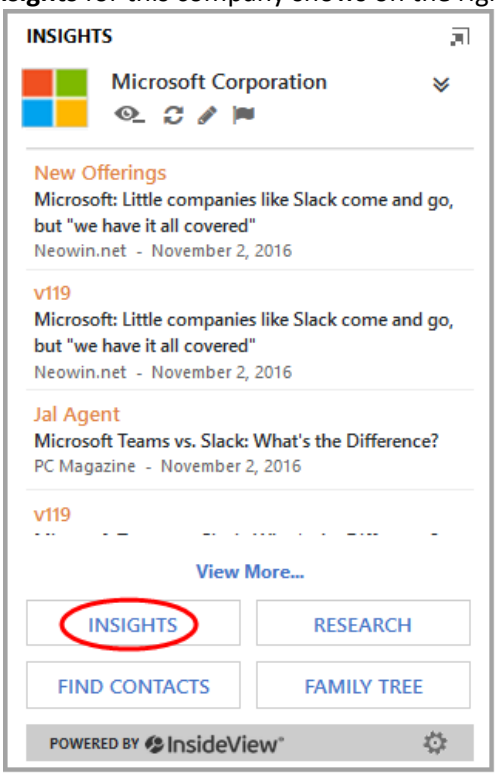
1. On the navigation bar, click **Microsoft Dynamics CRM** or **Dynamics 365** solution that you are using.
2. Select the **Sales**, **Service**, or **Marketing** work area. The work area name appears in the navigation bar.
3. Click the work area name, and then click **Accounts**.



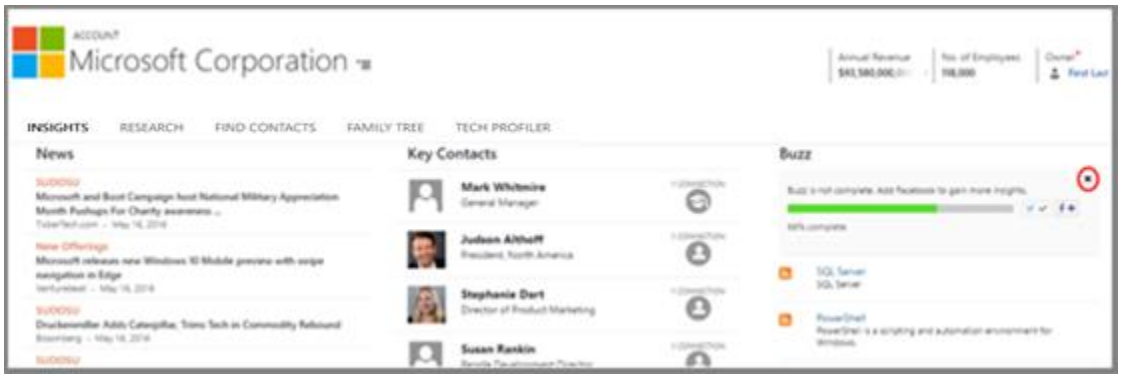
4. On the My Active Accounts page, open an account.



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



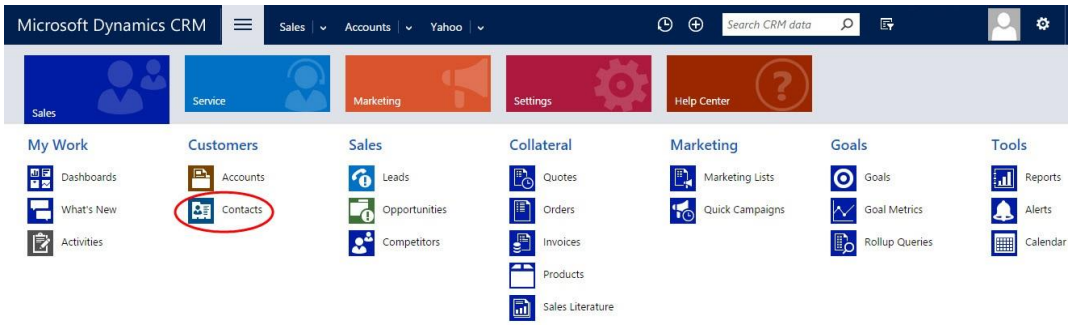
6. To view company news, key contacts, and social media buzz, click **Insights**.



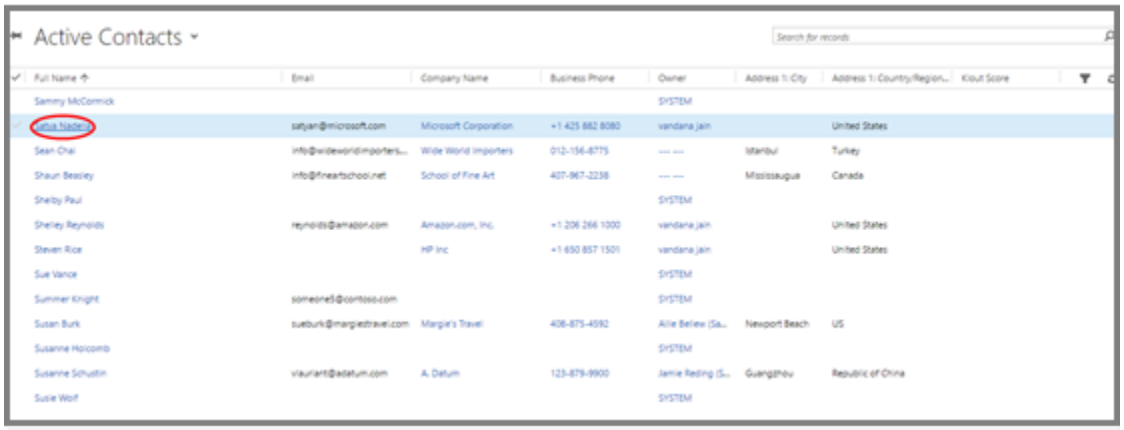
7. Click the **X Remove** button in the Buzz column to view the buzz feeds if you want to add Facebook feeds later.

Find contact insights

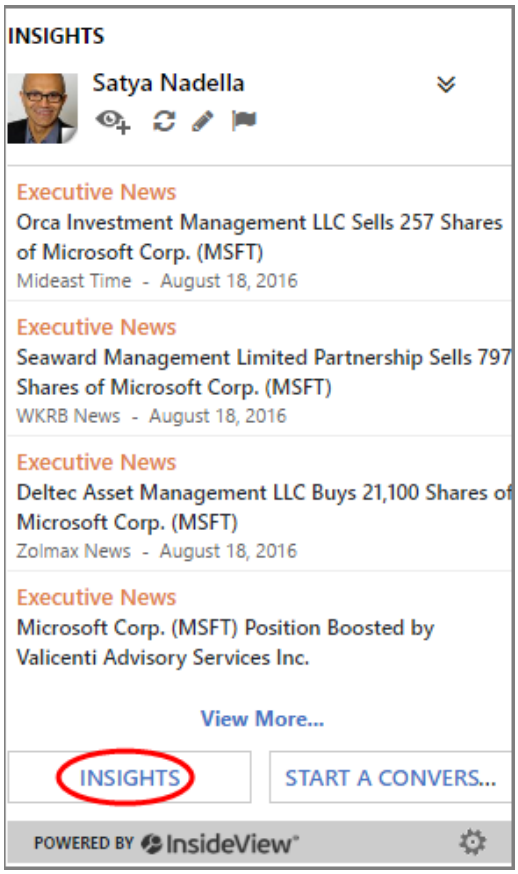
1. On the navigation bar, click **Microsoft Dynamics CRM** or any **Dynamics 365** solution that you are using.
2. Select the **Sales**, **Service**, or **Marketing** work area. The work area name appears in the navigation bar.
3. Click the work area name, and then click **Contacts**.



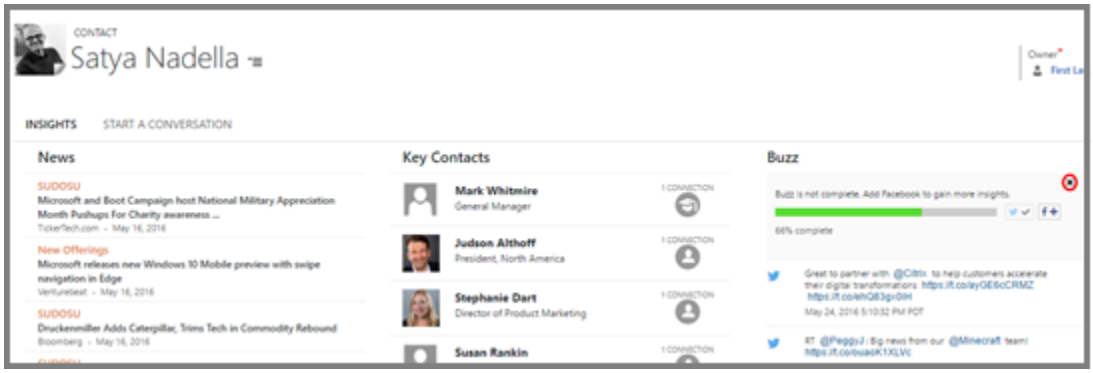
4. On the My Active Contacts page, select a contact.



5. Click the **Insights** tab to view news, key contacts, and social media buzz.



6. The Insights page for the contact opens.



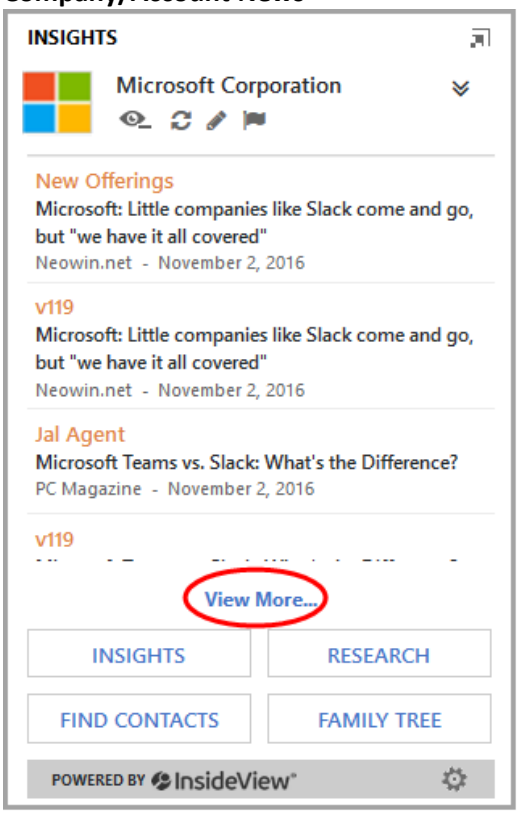
7. Click the **X Remove** button to view the Buzz feeds.
8. Click the **Start a Conversation** tab to view contact's firmographics, news, blog and social media posts.

News subtab

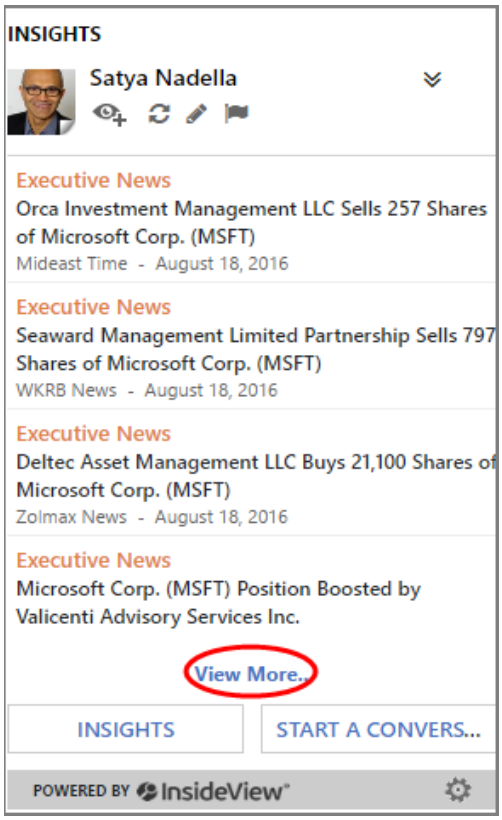
The **News** subtab displays news articles related to the selected company, and lets you complete the following:

- 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



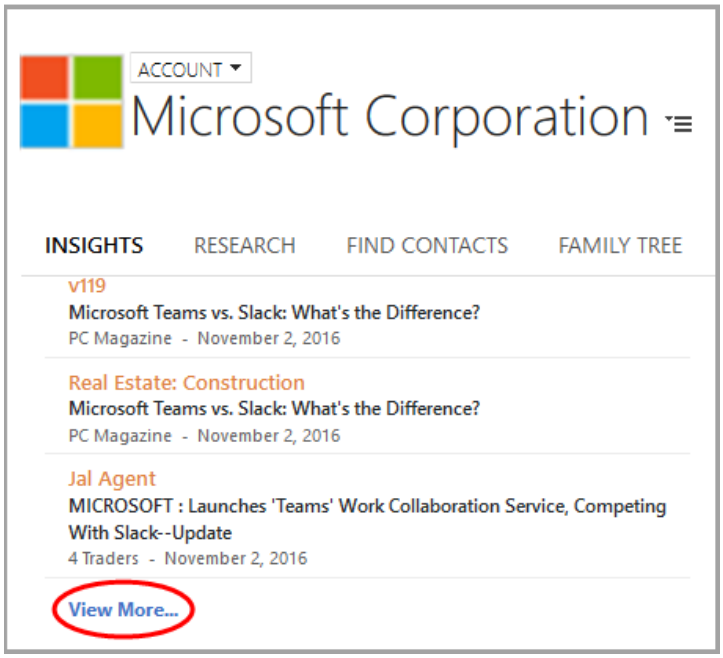
The most recent articles appear first in the list. To view other articles, click the **View More** link.

Share news articles on social media platforms

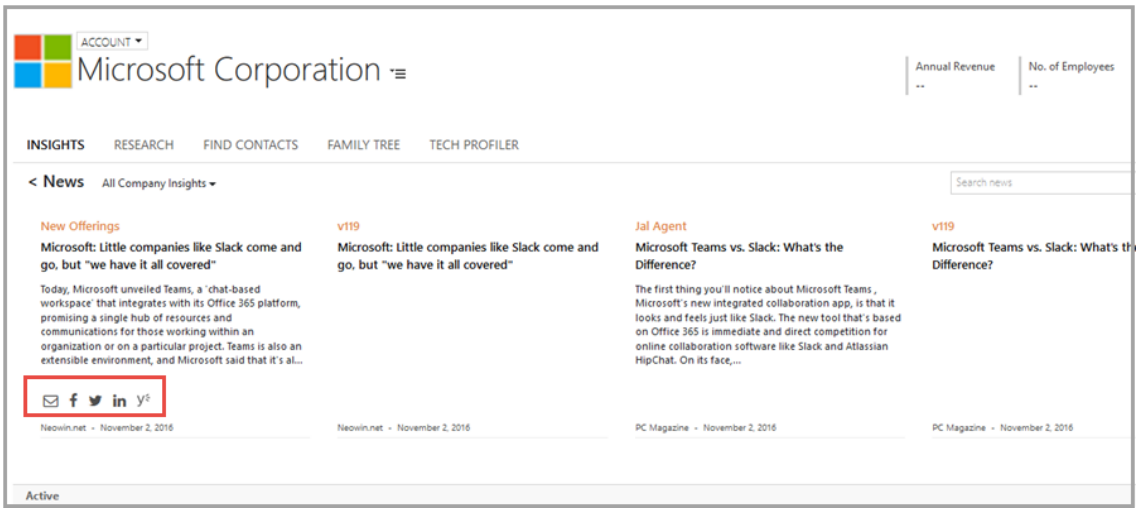
You can use the **News** subtab to share news articles from Insights on different social media platforms. Here's how:

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

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



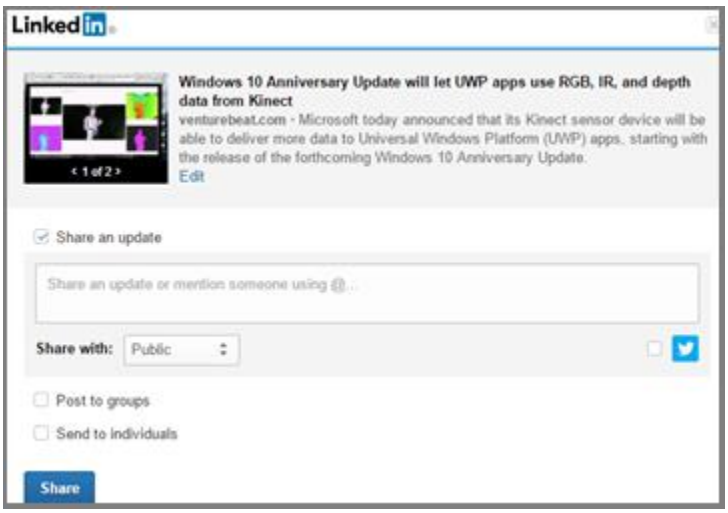
3. To share a news article, move your mouse over the news.



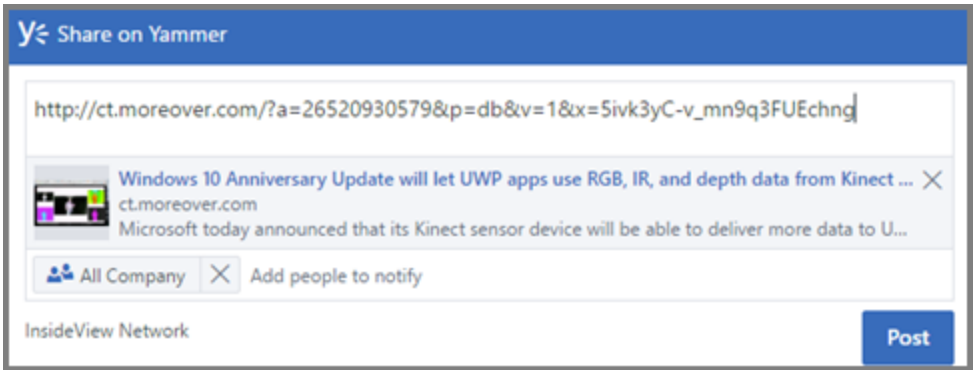
4. Share the news article through any of the following social platforms:
   - **Email.** Enter email addresses for all the recipients you want to send the news article to.
   - **Facebook.** Sign in with your Facebook account credentials and share the article on your Facebook timeline.

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

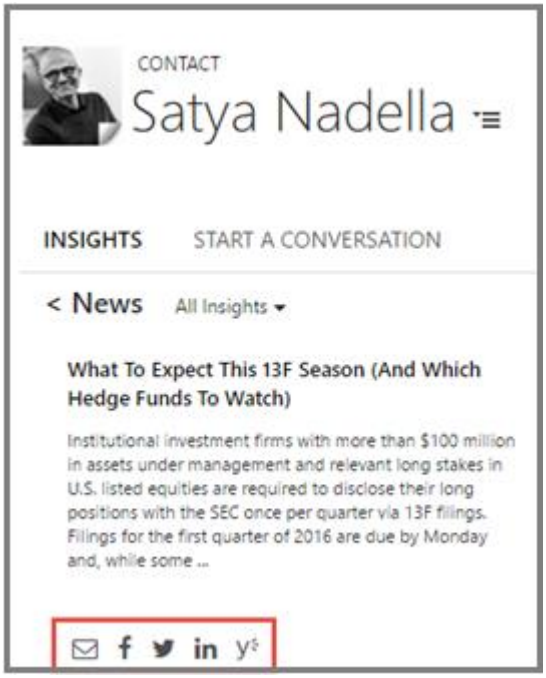
- **LinkedIn**. Sign in with your LinkedIn account credentials and share the article with your LinkedIn connections.



- **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

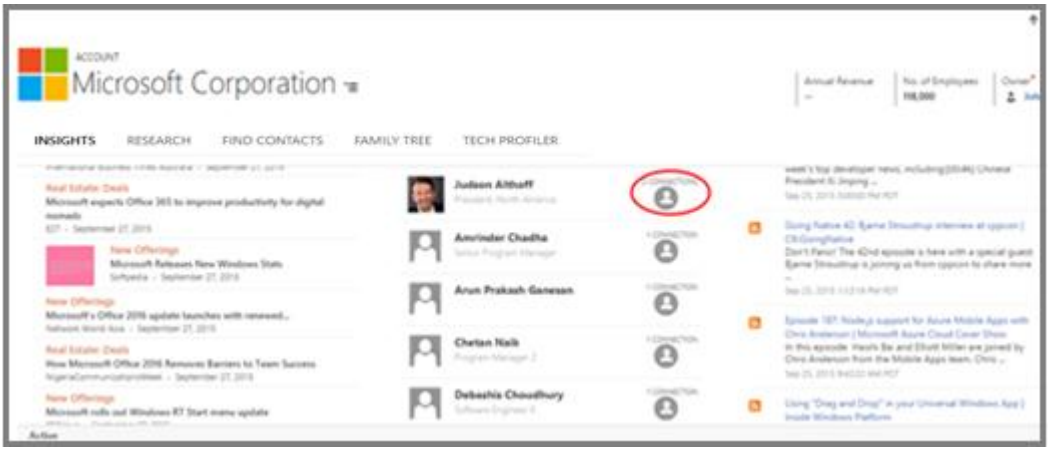
Check the **Key Contacts** subtab for the names of key decision makers at the company, including your connections to them, and to do any of these things:

- Search for key executives and decision makers who work for that company.
- View your connections, if any, to key decision makers at the company.
- Add a contact to the list of Watchlists at the company.
- Add a contact to your Watchlist.

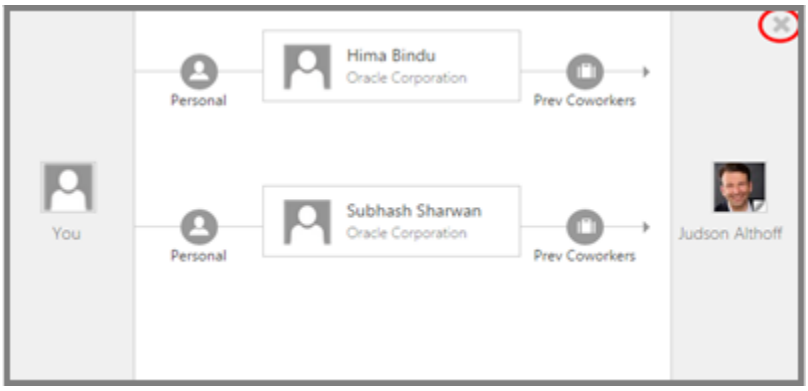
- Filter contacts by job functions and levels.

Company Key Contacts

1. To view how you are connected to a key contact, click the **Connection** button.

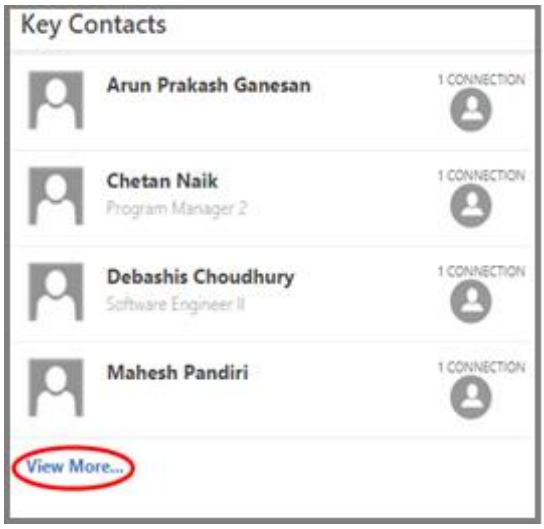


2. On the Connections pop-up window, review the contacts.



3. Click **Close**.

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

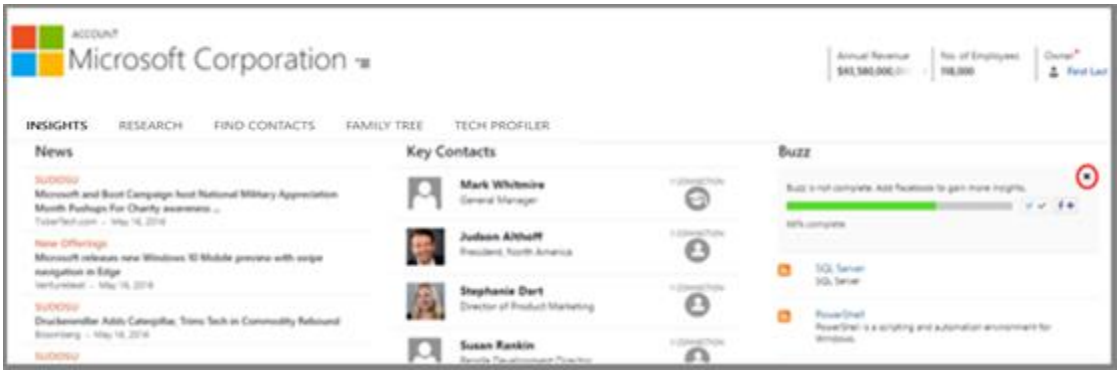


Buzz subtab

The **Buzz** subtab 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. From this tab you can also 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.
- Engage with the company directly on Twitter (replies, re-tweets) and Facebook (likes and posts).
- View the buzz meter that shows the percentage of social media feeds that you have configured.

Company's Buzz Page



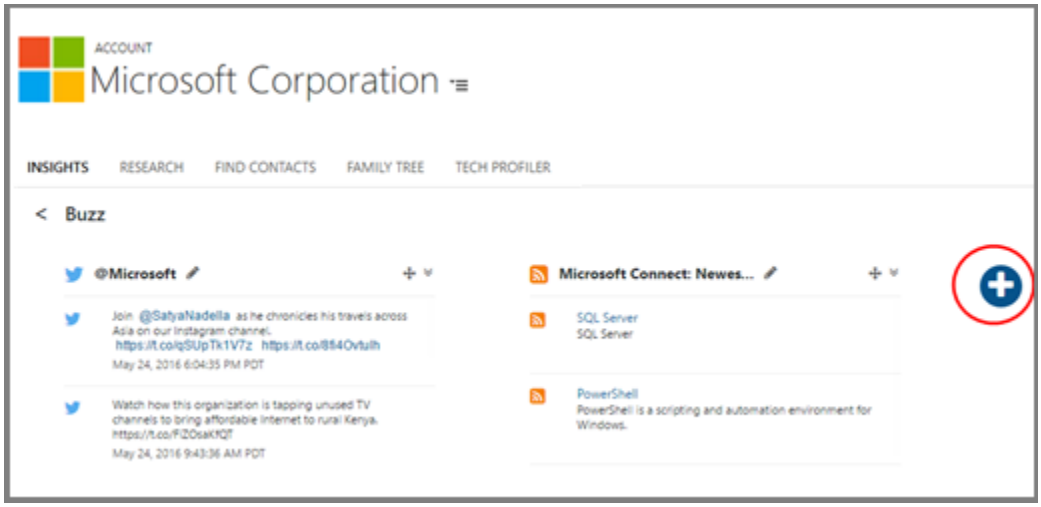
Click the **X Remove** button to close the buzz meter if you wish to configure social media feeds later.

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.

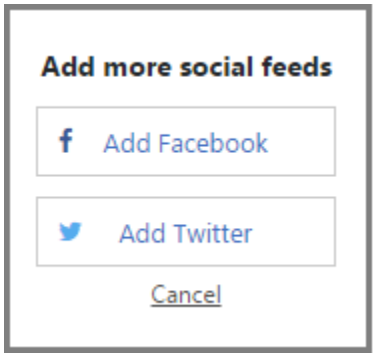
Set up your social feeds

You can use Insights, powered by InsideView 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:

1. Go to the Company's or Contact's Insights 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.

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

For more information, see *Set up Your Company Insights*.

Chapter 3: User preferences

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

Set up your Standard Agents

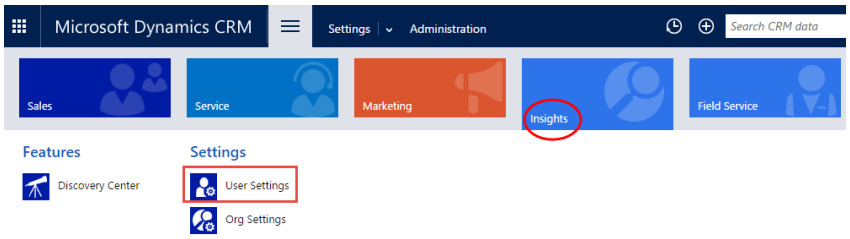
Standard agents are predefined with select keywords to gather specific business events related news, such as Leadership Changes, New Releases, etc. These agents are selected by default on the **Company Insights** tab.

You can set up your company insights by choosing search agent categories from a list of standard items. By clearing 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**:

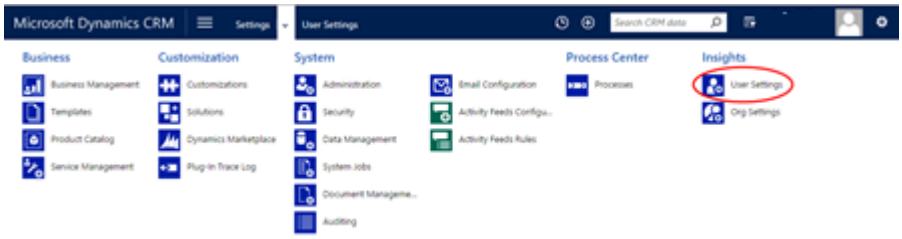
1. Sign in to your Microsoft Dynamics application.

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

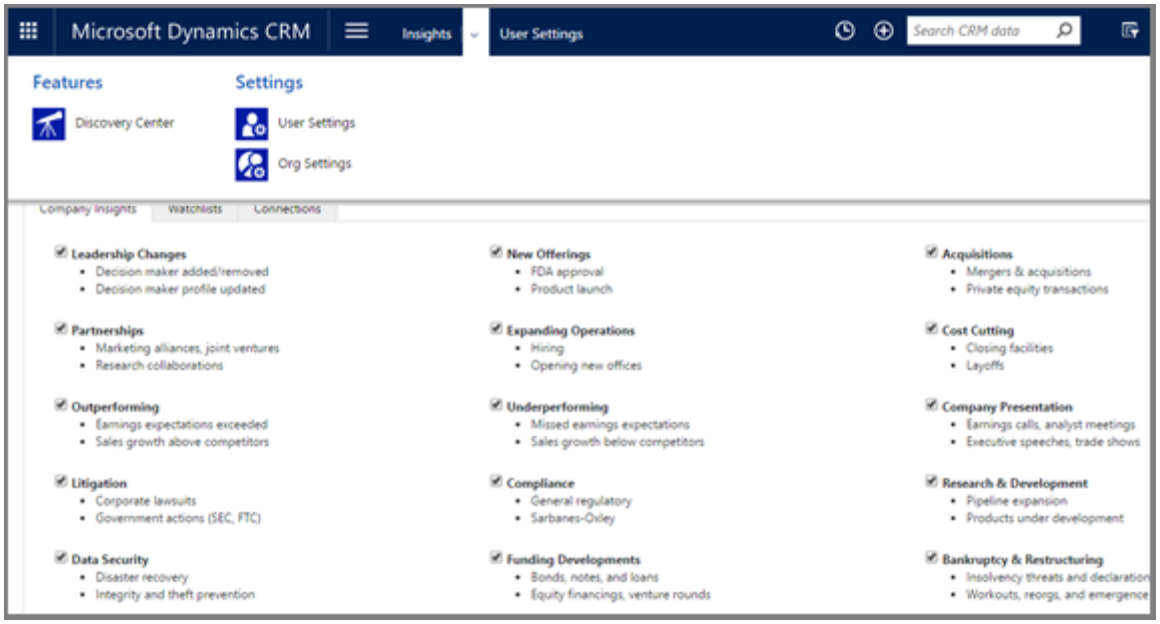


Or,

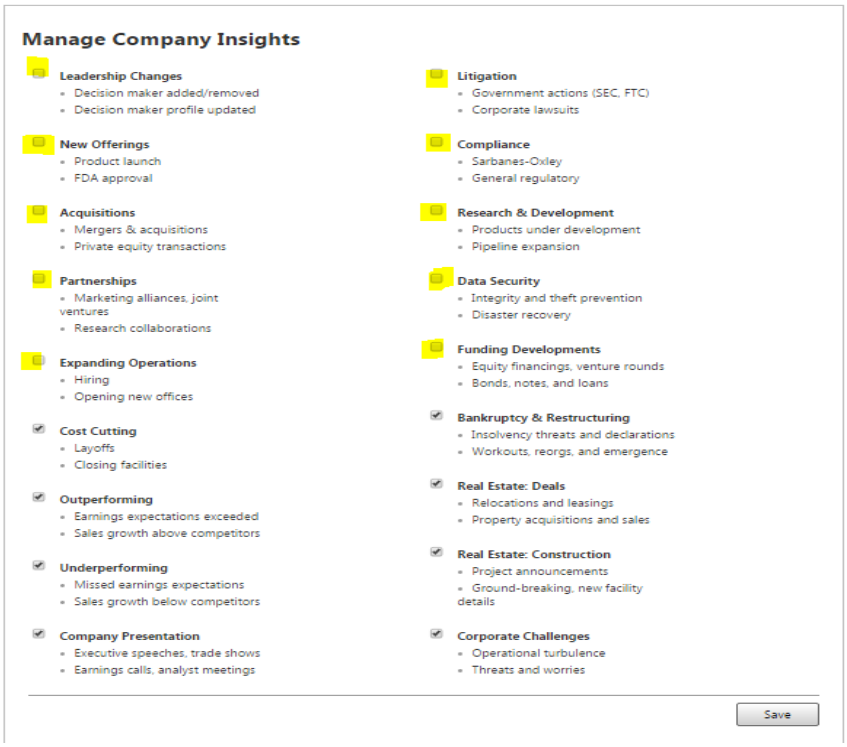
Go to **CRM > Settings > Insights > User Settings**.



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.



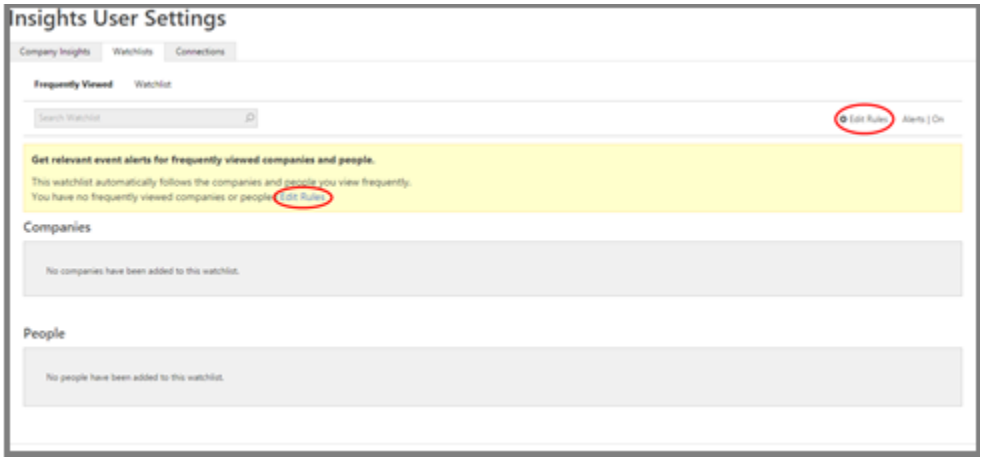
5. Click **Save**.

Manage 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

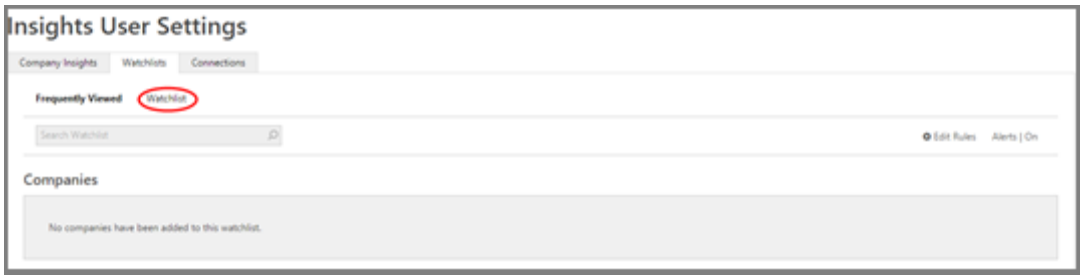
The **Watchlists** subtab displays all the companies and contacts that you have added to your Watchlists. For more information, see Add a Company or a Contact to a Watchlist.

Note: You can add a maximum of 200 companies and executives to your Watchlist.

Edit the Watchlist

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

2. Click the **Watchlist** link.

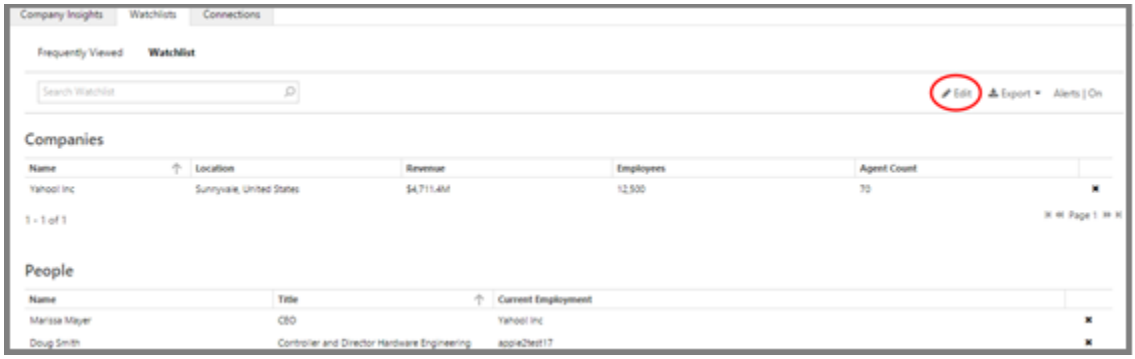


3. On the **Watchlist** subtab, review the companies and contacts you are following.

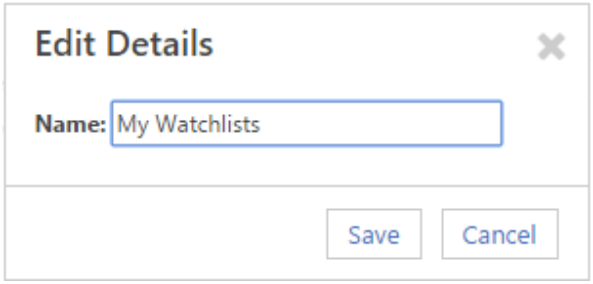
4. To change the sorting of companies and contacts on your Watchlists, click the header of any column.

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 .



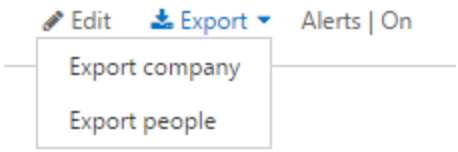
7. In the Edit Details dialog box, type a name for your Watchlist.



8. Click **Save**.

Export the Watchlist

1. Click the **Export** button .



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

Edit email alert settings

Insights, powered by InsideView 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**.

Set up your connections

Insights, powered by InsideView 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.

Insights, powered by InsideView 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. Insights, powered by InsideView 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.

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.

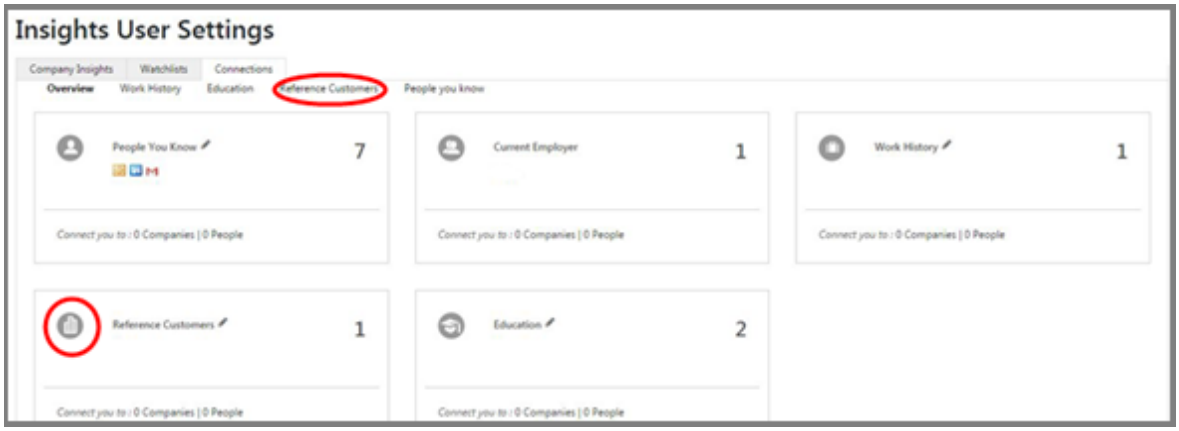
2. On the **Education** subtab, enter information in the following boxes:

    - 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

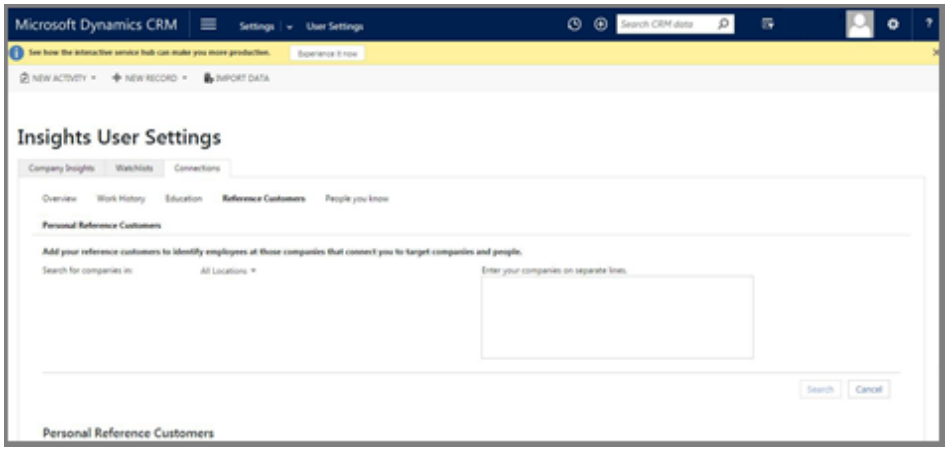
3. Click **Add**.

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.



Reference customers are satisfied customers who would be willing to provide you with a testimonial or an introduction to people in their professional network. Insights, powered by InsideView 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. This will increase the chances of a faster response. For information on connections, read the section Set up your connections.

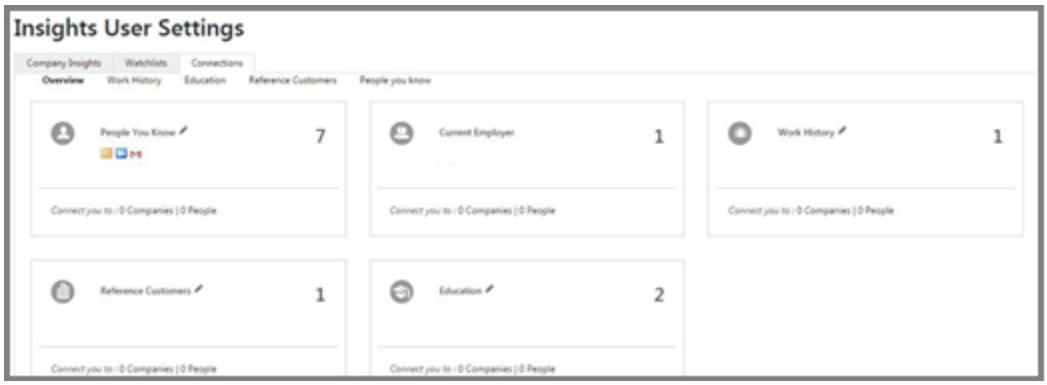
3. In the **Reference Customers** page, select the appropriate location from the drop-down menu and specify the company names on separate lines.

4. Click **Search**.

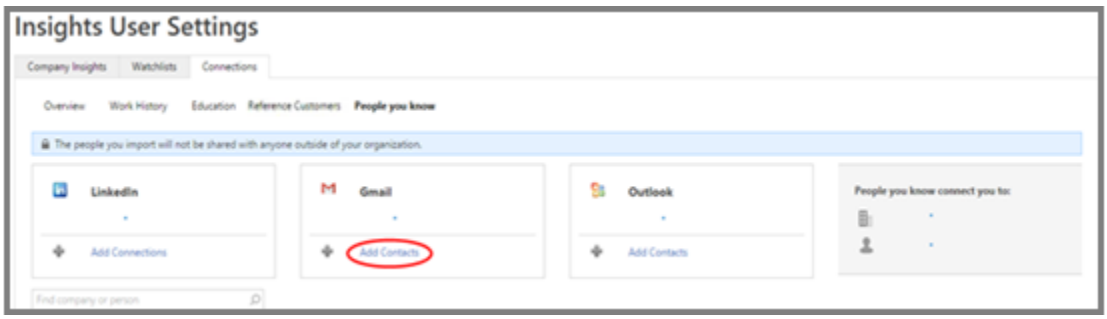
5. From the Search result, select the name of the company and click **Add Reference Customers** to add them for reference. Insights will add these companies to your Reference Account list.

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. Other contacts that you may have received via emails from or sent emails to will not be added to your connections.

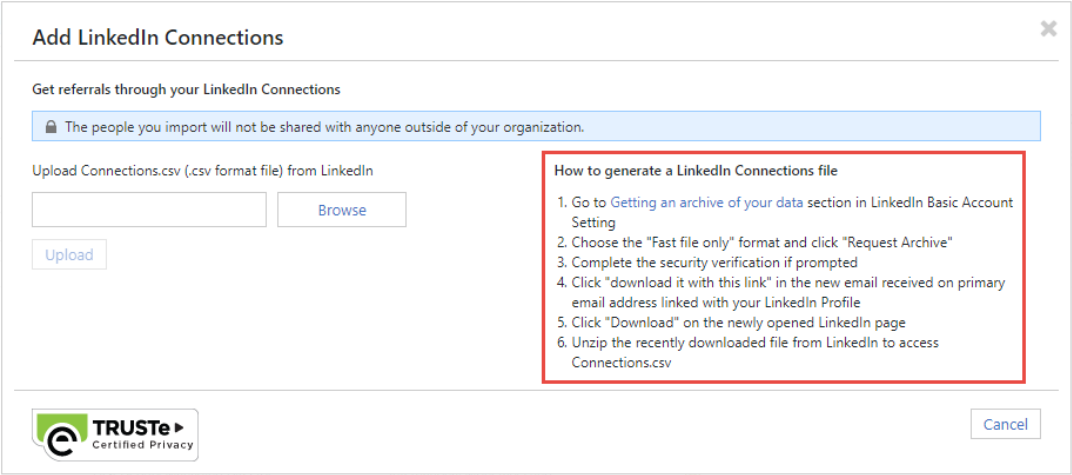
4. On the Gmail login page, enter your username and password, and then click **Accept**.

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.

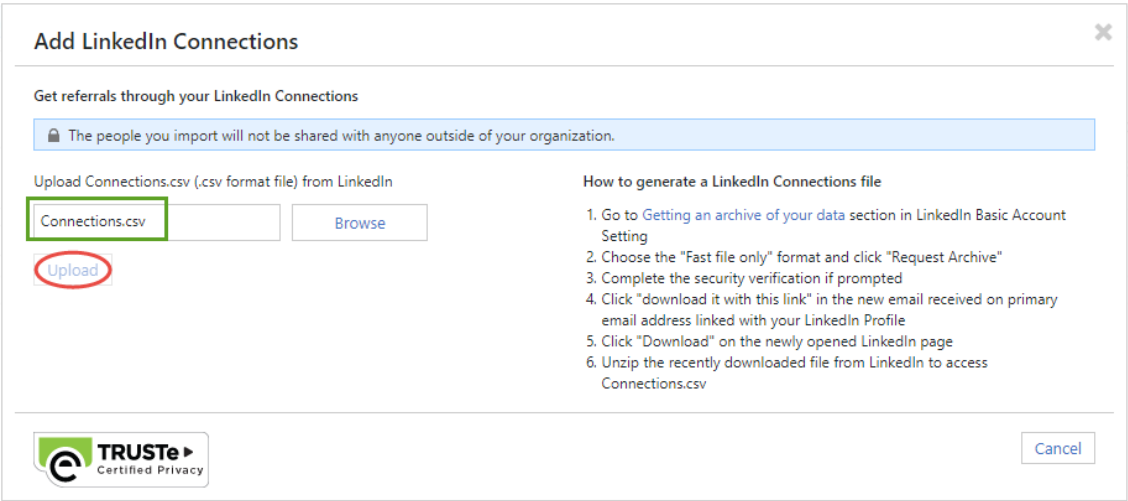


2. Follow the instructions in the **Add LinkedIn Connections** window to get an archive of your **LinkedIn Connections**.

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. In Microsoft Outlook, click File, click **Options**, and then click **Advanced**.
2. Under the Export section, click **Export**.
3. In the Import and Export wizard, click **Export** to a file and click **Next**.
4. Under Create a file of type, click **Comma Separate Values**.
5. Under Select folder to export from, select Contacts and then click **Next**.
6. In the Export to File dialog box, click **Browse**, and select a destination folder for the file.
7. In the File name box, enter a name for the file, and then click **OK**.
8. Click **Next**, and then click **Finish**.

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.

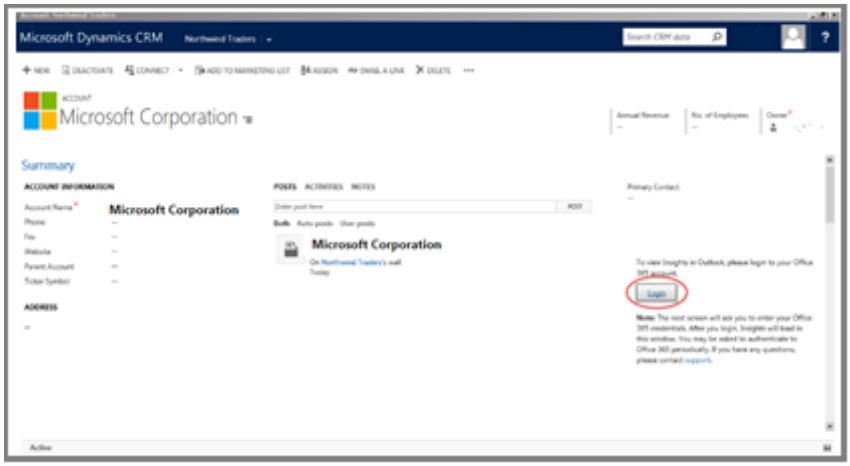
   Note: You cannot export Contacts for Microsoft Outlook 2016 on Mac

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

Get to Insights, powered by InsideView through Outlook

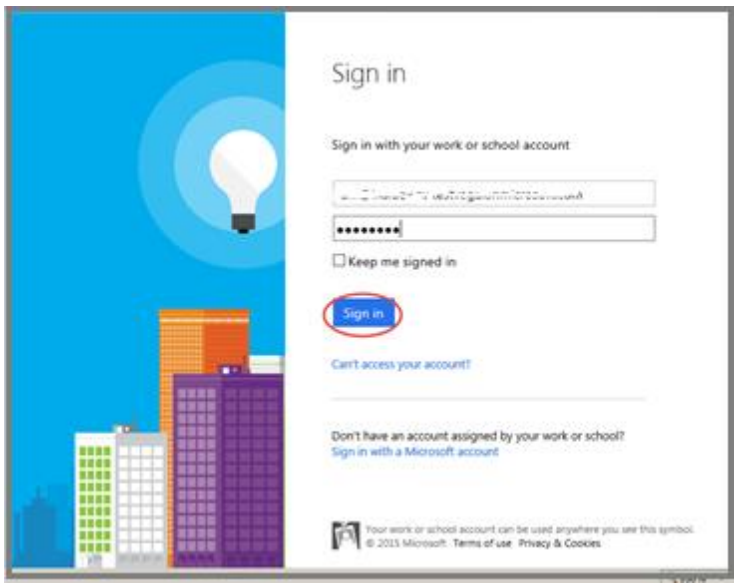
You can access Insights through the Outlook client at the individual user level.

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.

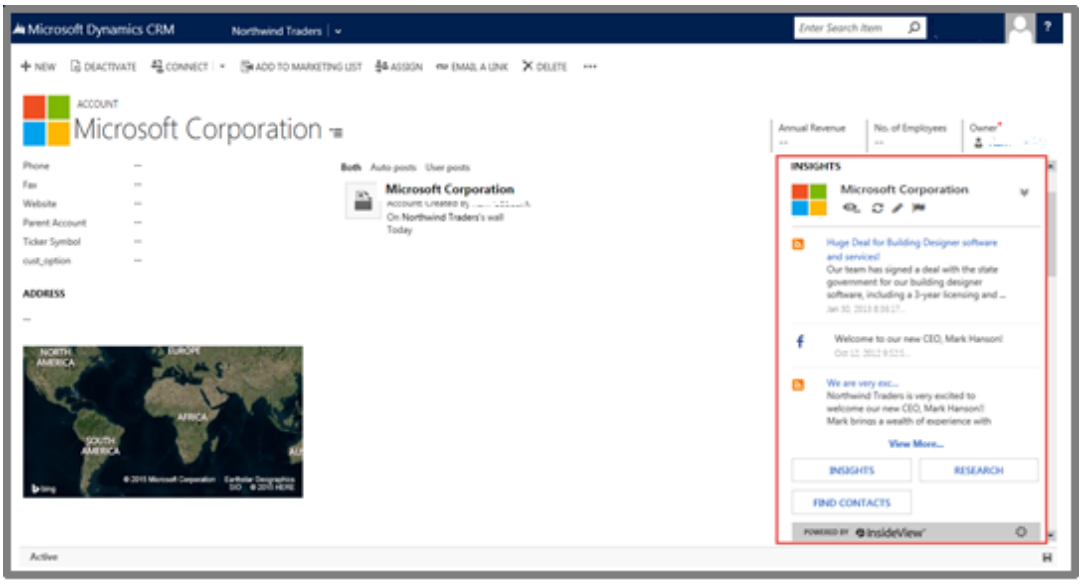


2. Click **Login**.

3. Enter your Microsoft Dynamics 365 or CRM Online 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 Insights, powered by InsideView available through the Dynamics CRM Online Web Client" in the *Insights, powered by InsideView Installation Guide*.

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

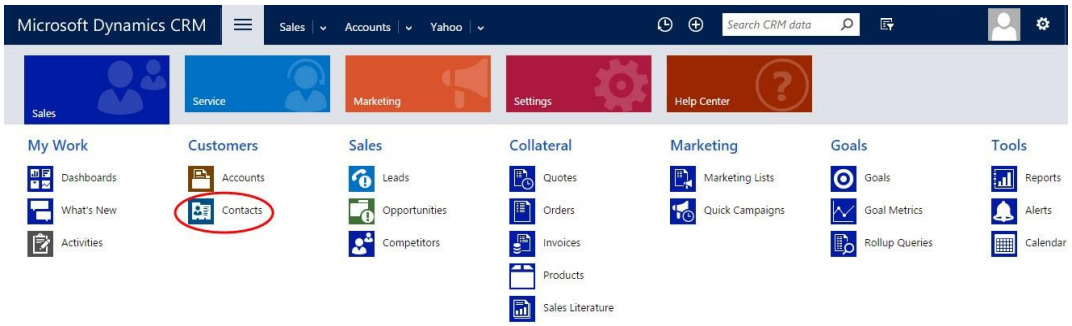
Use Insights, powered by InsideView for contacts and leads to identify conversation starters with the following data about a contact:

- View all contact information, including email address, and phone number, as well as employment and education details.
- View how you are connected with contact's personal connections and previous co-workers.
- 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.

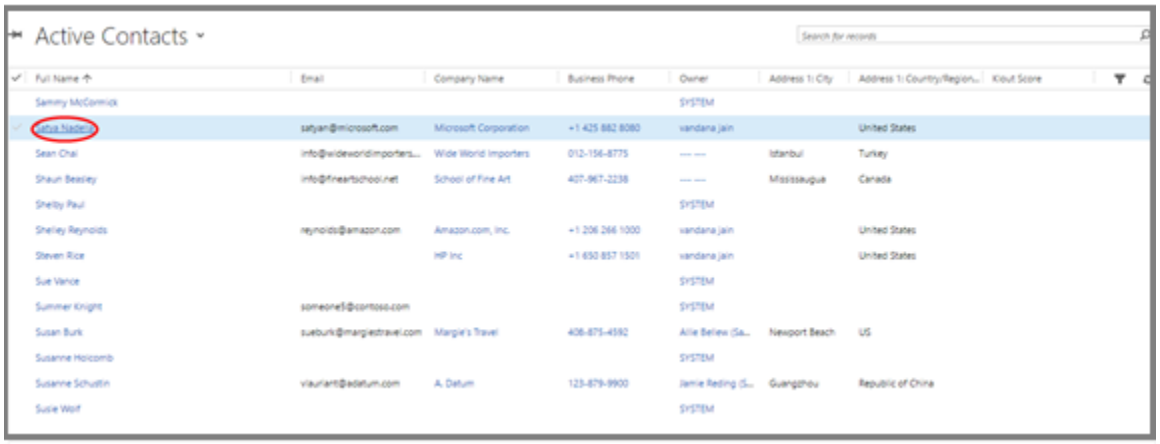
Getting to Start a Conversation with Contacts

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

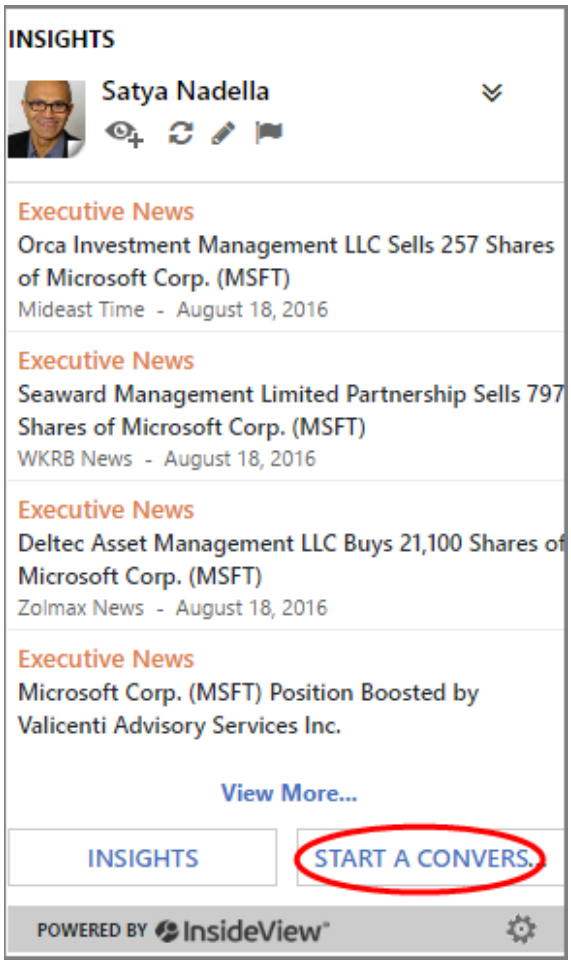
1. On the navigation bar, click **Microsoft Dynamics CRM** or any **Dynamics 365** solution that you are using.
2. Select the **Sales**, **Service**, or **Marketing** work area. The work area name appears in the navigation bar.
3. Click the work area name, and then click **Contacts**.



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.

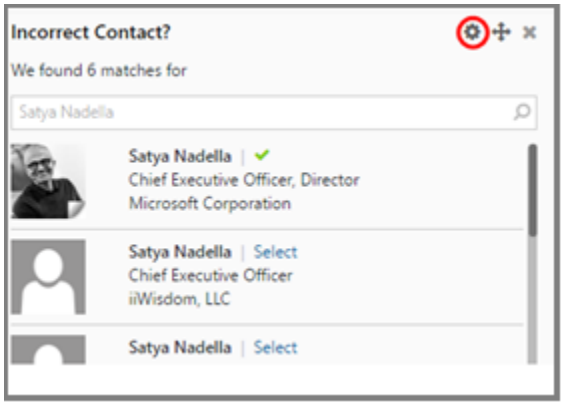
Edit Contact Profile Settings

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

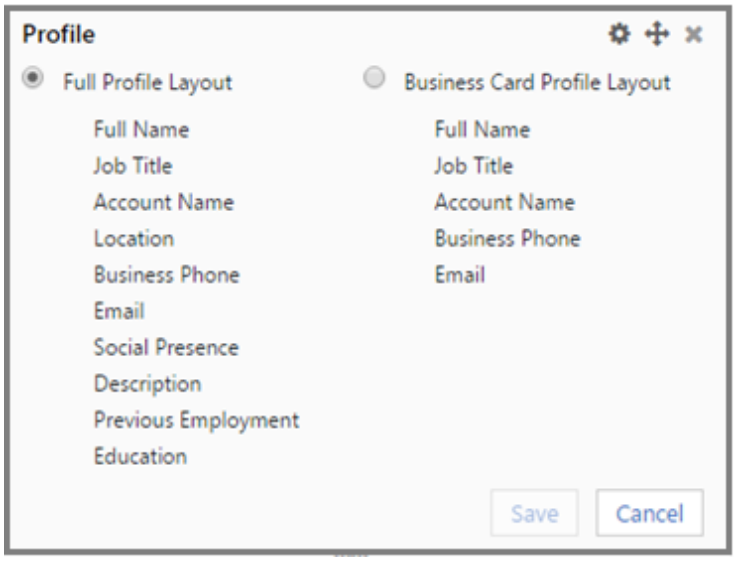
1. Go to the Start a Conversation page of a contact.

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

3. Click the **Settings** icon.



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

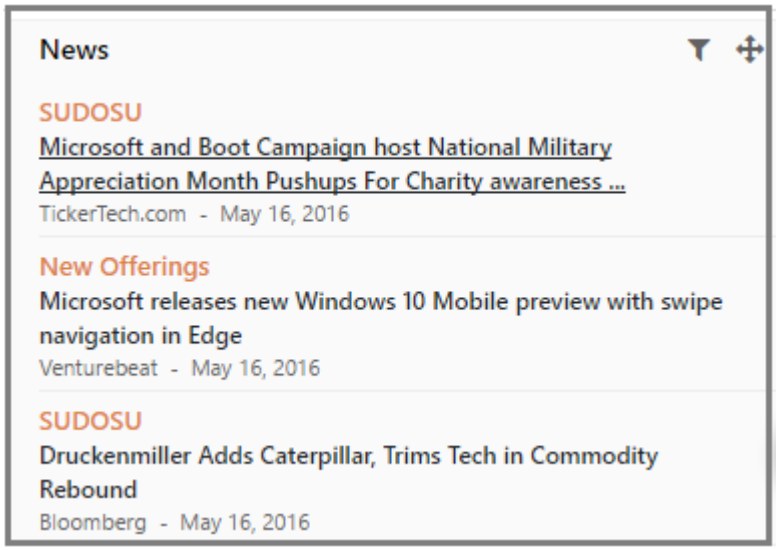


5. Click **Save**.

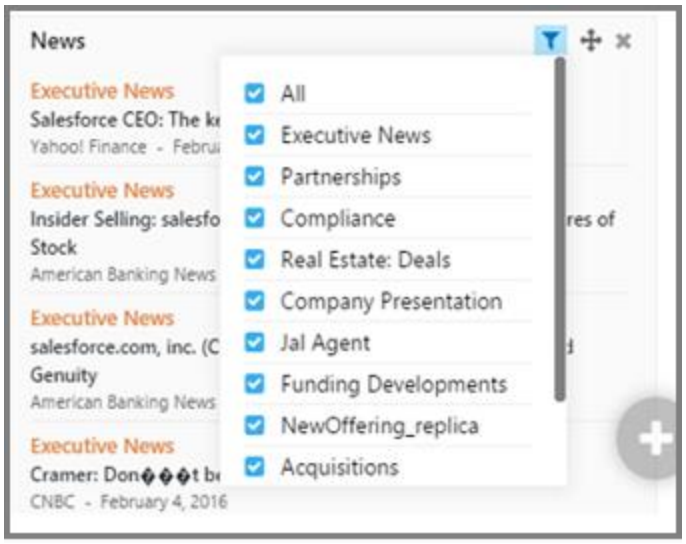
Filter New Feeds

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

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

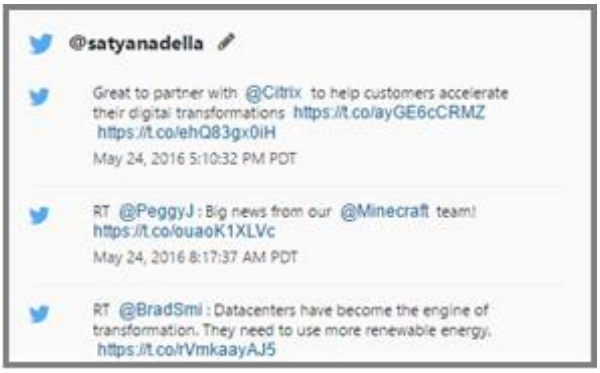


3. Select any filter to view the news feeds relevant for your business requirements

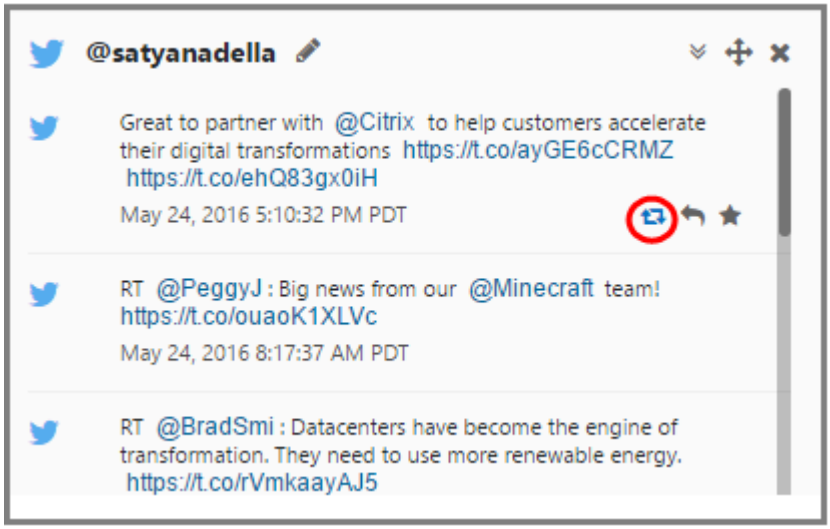
Add Contact's Twitter Feed

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.

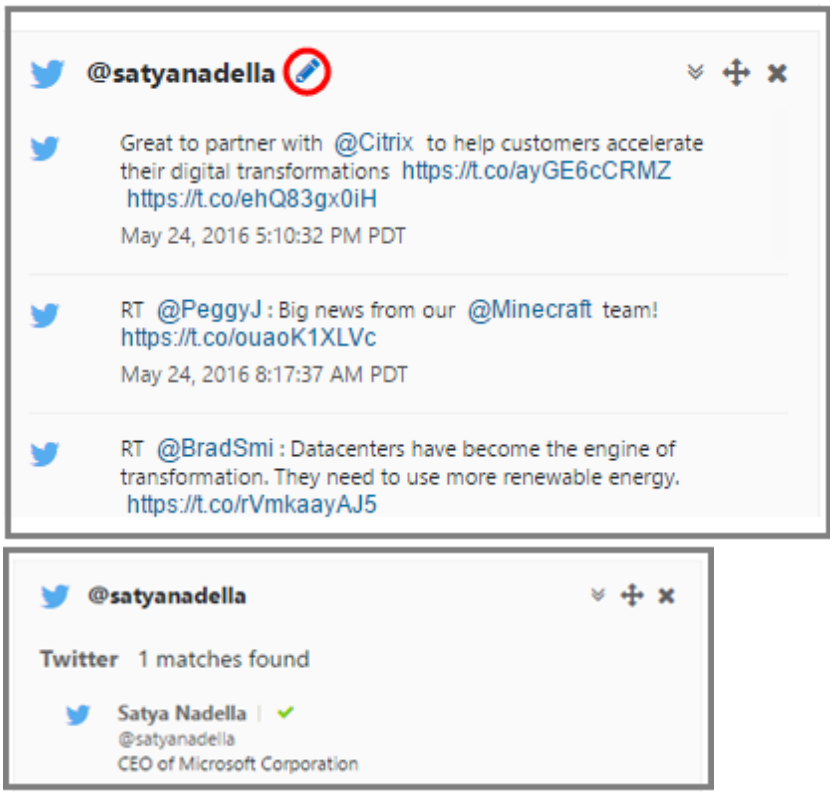
3. The contact's Twitter posts are displayed once you authorize Insights' access to Twitter from your account.



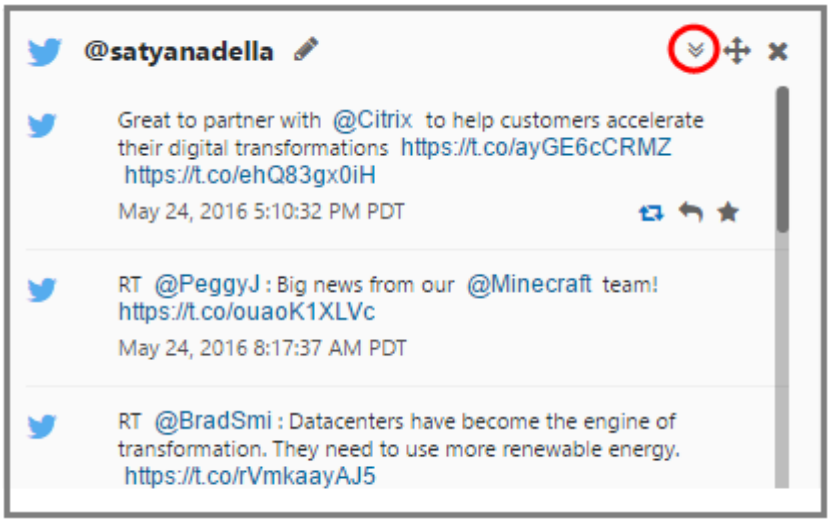
4. To interact with the Twitter feed, select a tweet and click the **Retweet**, **Reply**, or **Favorite** button to repost the item.



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.

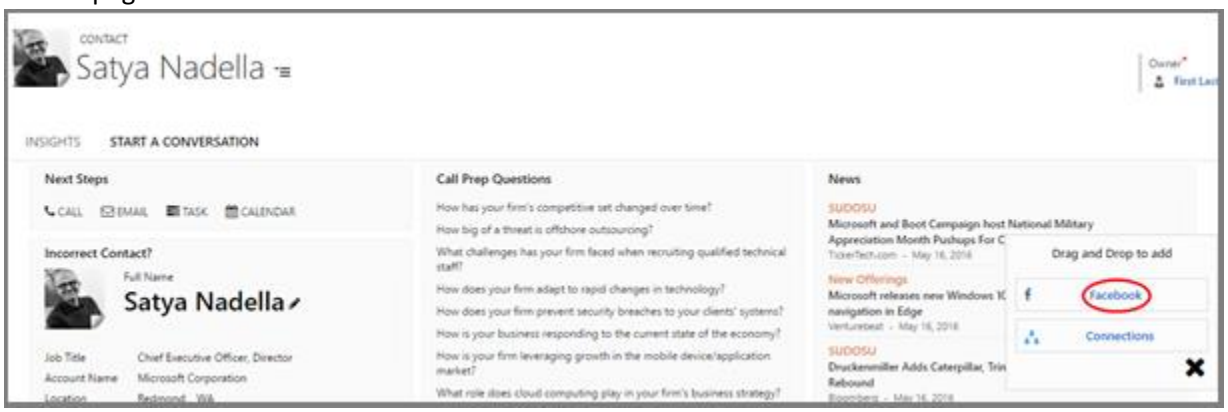
8. To move the Twitter widget within the Contact Details page, click the **Move** button.

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

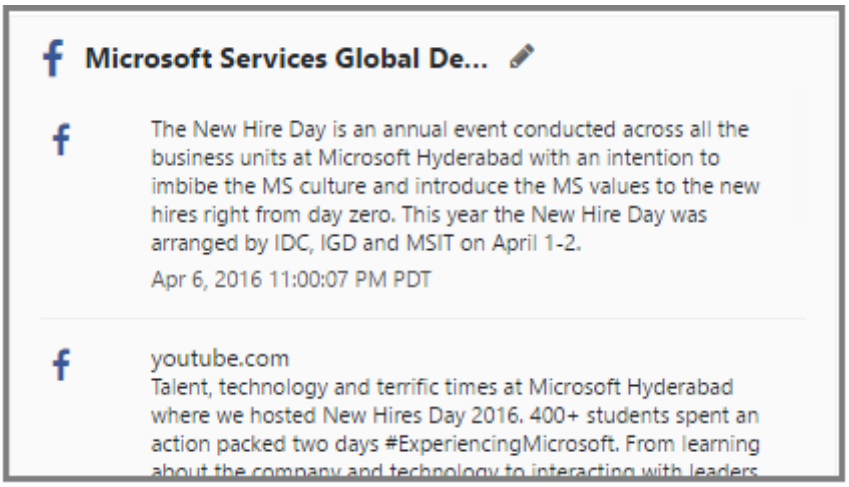
   Note: You can edit, expand/collapse posts, move, or remove Facebook, Blog and Call Preparation questions in the Contacts Details page by following steps described in this section.

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.



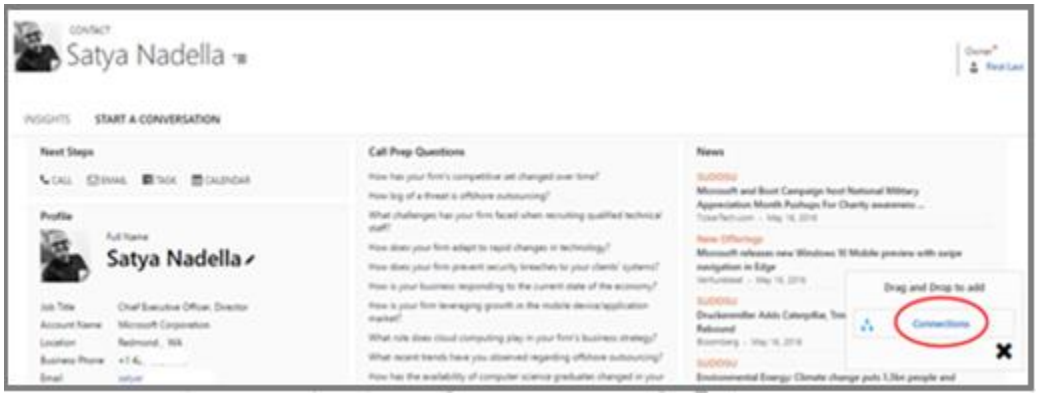
3. If you are adding the Facebook feed for the first time, you will need to sign in to your Facebook account and authorize Insights to post feeds.



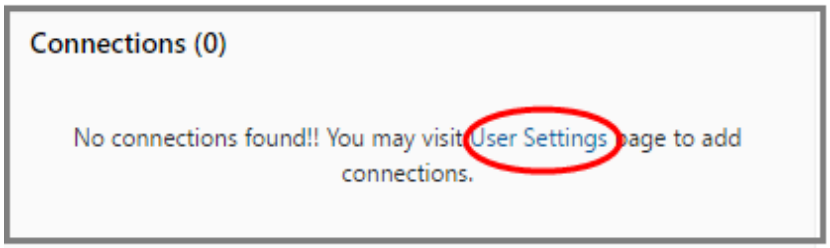
4. To comment or like a Facebook post, select a feed and click the **Comment** or **Like** button.

Add Connections

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



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

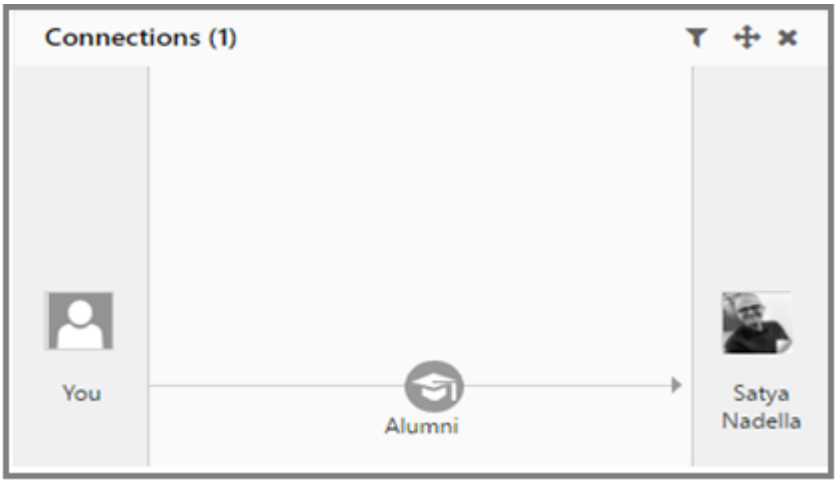


3. To add connections from your previous work history, education, or people you know, read the respective section from Set up your connections.

Filter Personal Connections

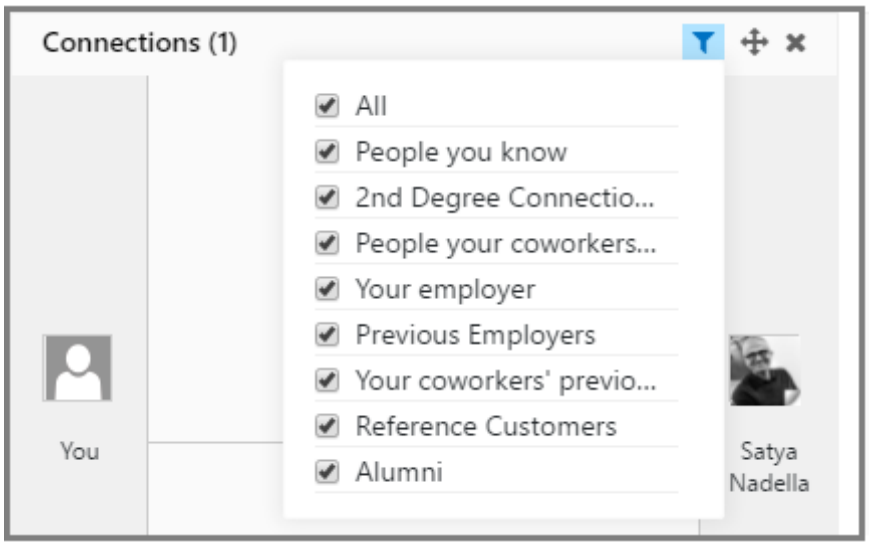
Use filters to view a contact's personal connections. Here's how:

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.

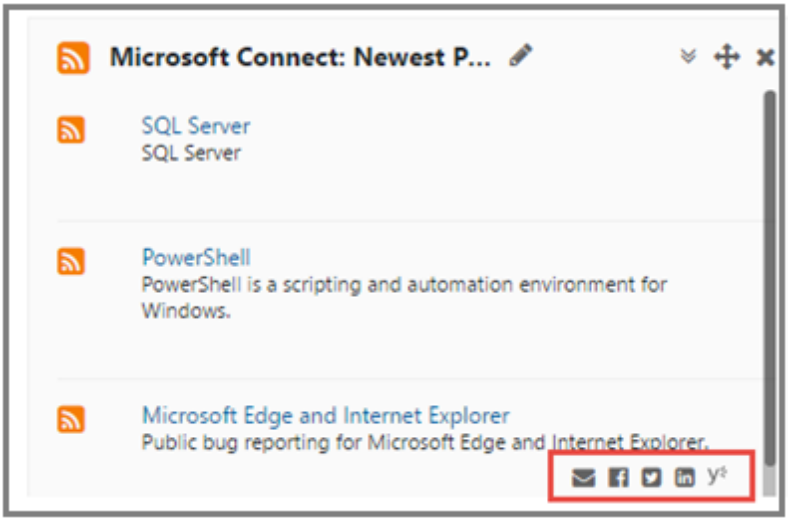


Share Blog Posts

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

1. The Blog posts appears automatically on multiple tabs within Insights.

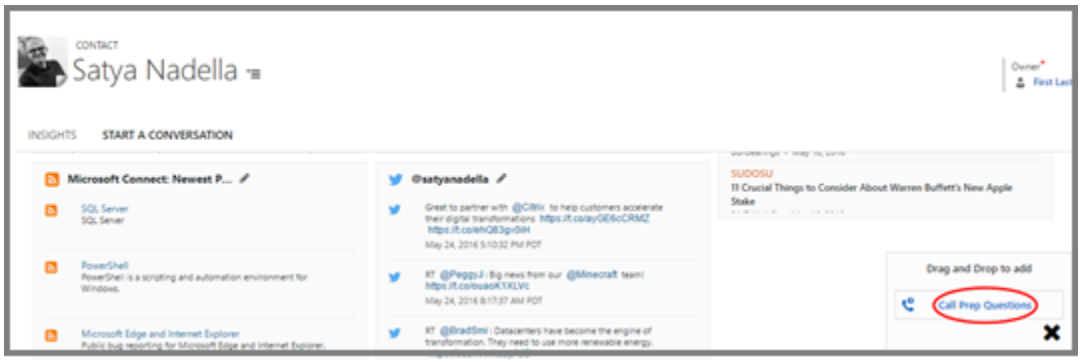
2. To share a blog via Email, Facebook, Twitter, LinkedIn and Yammer, select a blog post.



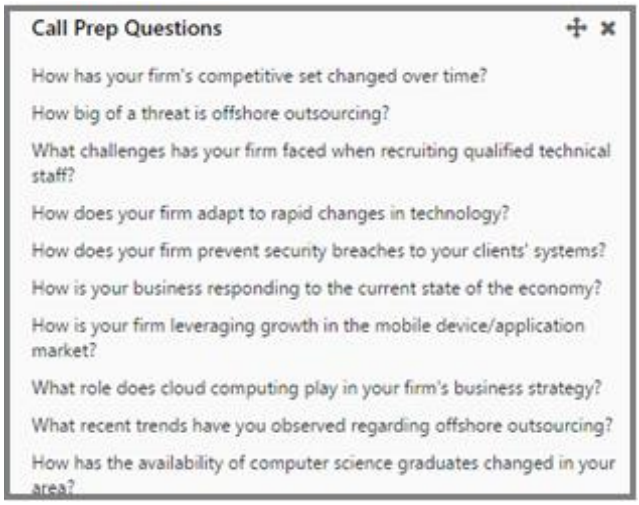
3. Click the preferred social media network or email icon to share the post.
4. For more information and social network specific instructions, see the [Share news articles on social media platforms] section.

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.

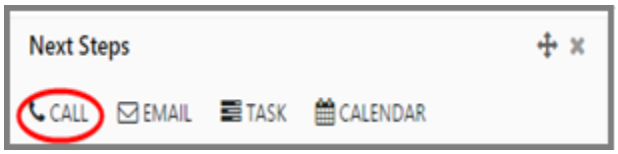


Start a Conversation Actions

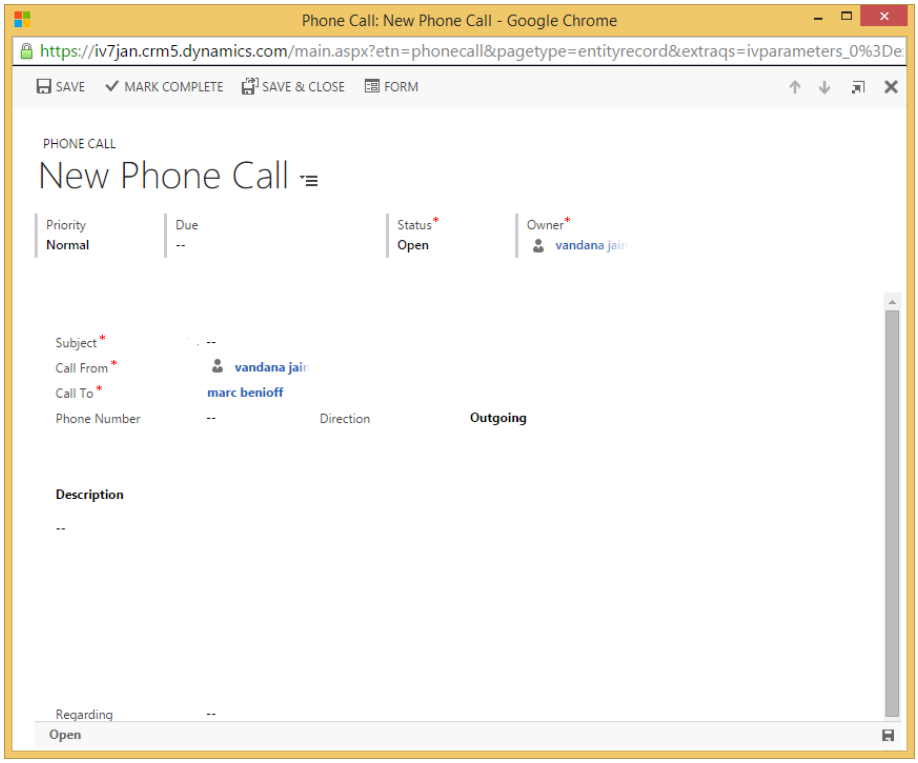
Use the information in the various sections of a contact's Start a Conversation tab to start a business conversation. Here's how:

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.



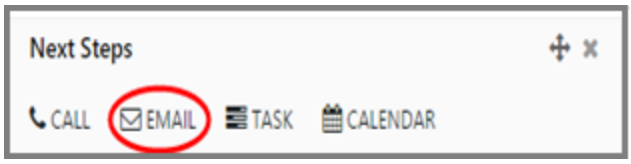
4. Enter the following details:
   - **Subject:** the purpose of the call.
   - **Call From:** the person's email who wants to call.
   - **Call To**: the recipient's email or name.
   - **Description**: the reason for your call.
   - **Others Values:** specify the values that are needed for other fields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

5. Click **Save**.

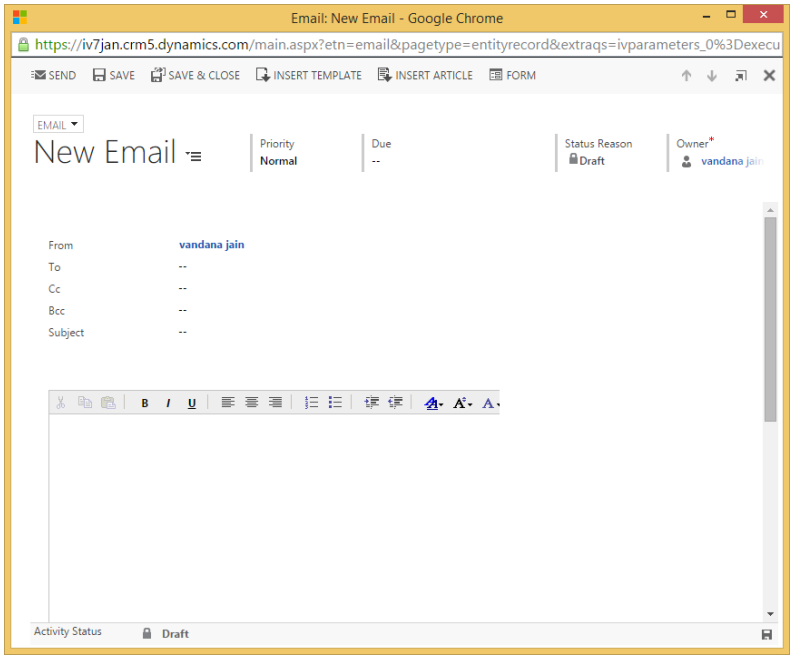
   Note: A reminder to call the contact is created in the **CRM > Service > Activities** page.

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.

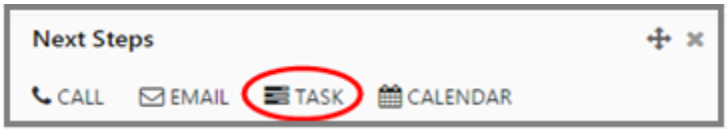


4. Enter the following information:
   - **From:** the sender's email.
   - **To**: the recipient's email.
   - **Cc** and **Bcc:** email addresses of persons whom you want to mark a copy to.
   - **Subject:** the purpose of your email.
   - **Description**: The body of email.

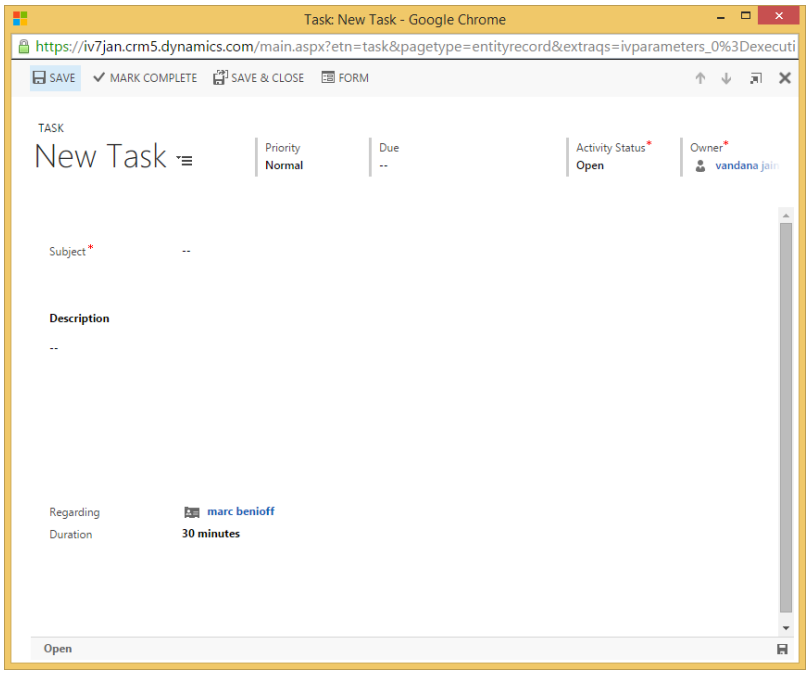
5. Click **Send**.

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.

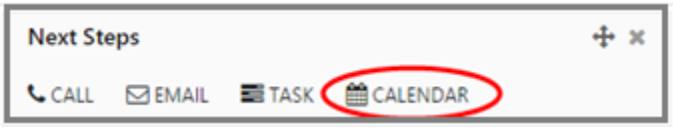


4. Enter the following information:
   - **Subject:** the purpose of your email.
   - **Description:** the body of email.
   - **Duration:** the duration of the task.

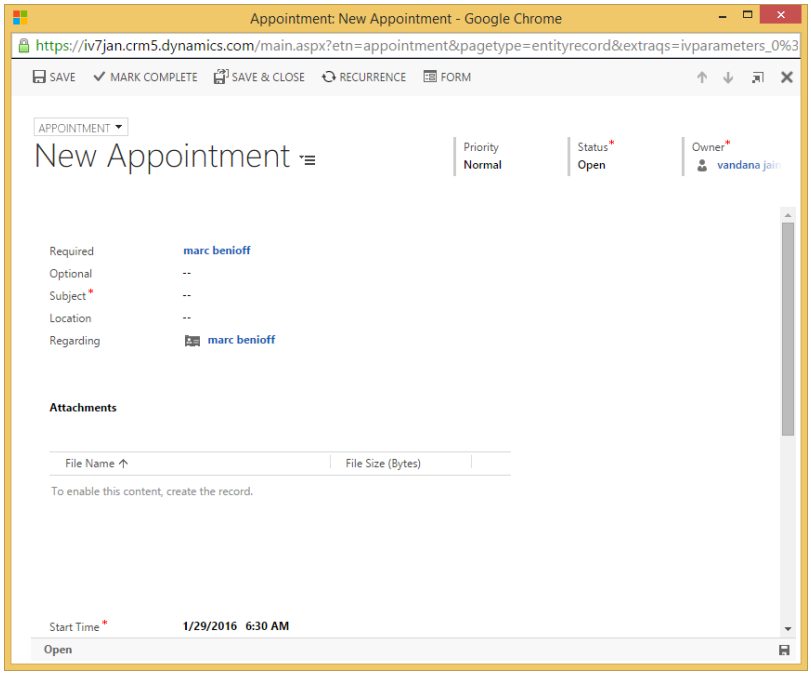
5. Click **Save**.

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**.

Start a Conversation with Leads

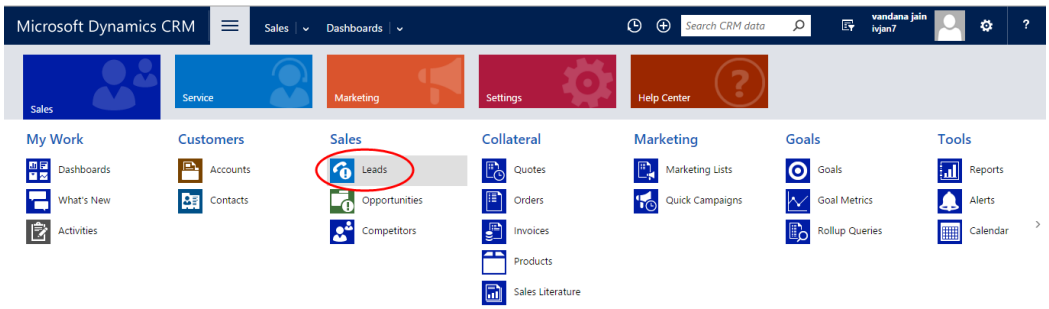
The Start a Conversation page provides the following about a lead:

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

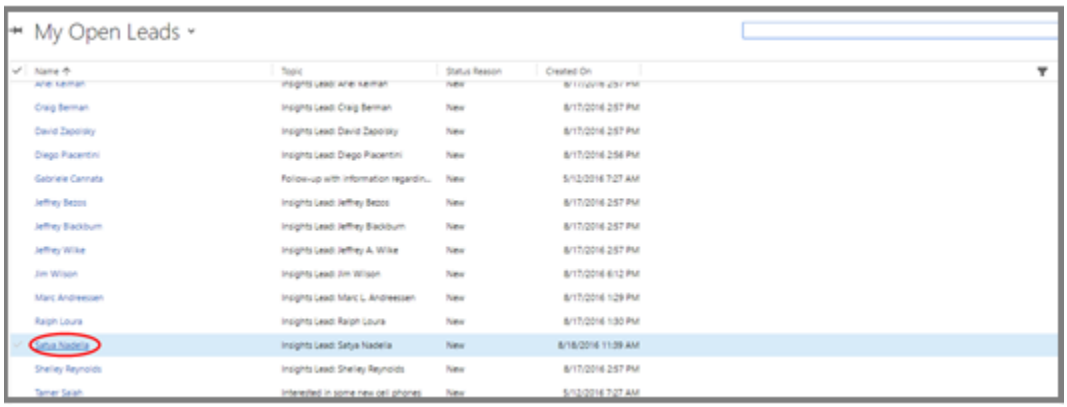
Getting to Start a Conversation with Leads

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

1. On the navigation bar, click **Microsoft Dynamics CRM** or any **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 Functions section to create call reminder, send an email, create a task and schedule a meeting with the lead.

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

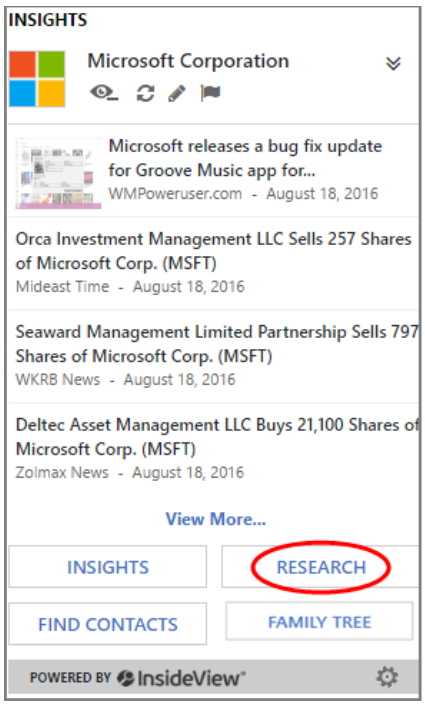
The **Research** tab provides comprehensive and up-to-the-minute information about companies so you can stay informed about their industry, examine similar accounts (their competitors), and research financial data before you approach them for business conversations. In the **Research** tab, all information 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 Insights, powered by InsideView, 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

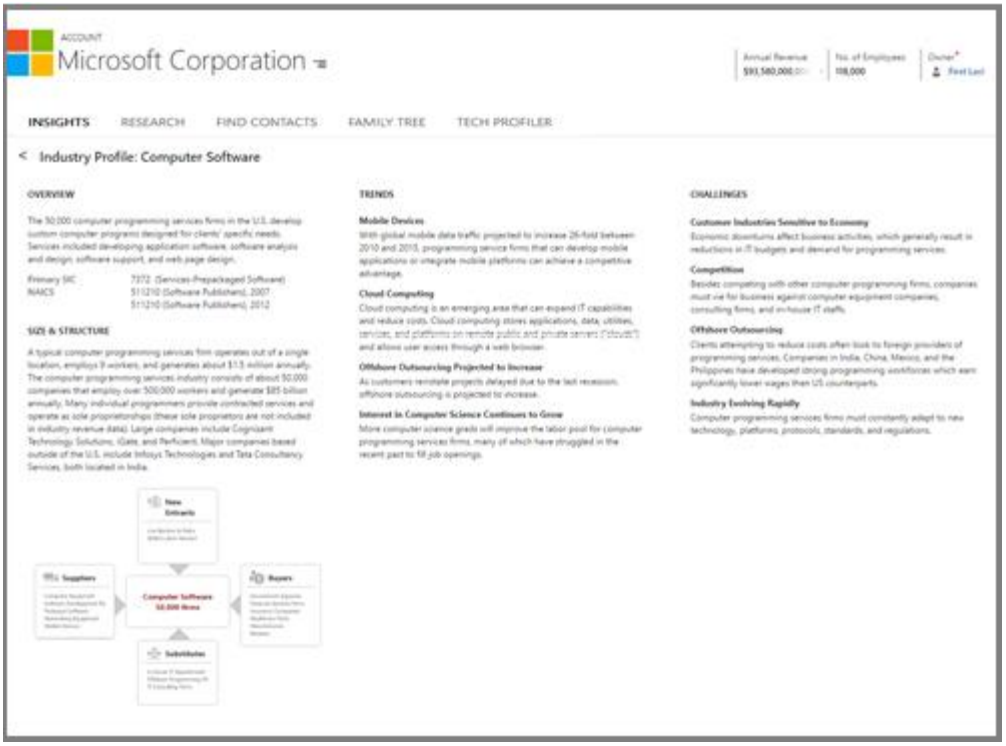
The **Industry Information** displays a detailed industry profile for that company, including its challenges, trends, size, and structure. When you click **Research** in Insights view, the industry profile information is displayed within Dynamics 365 or CRM Online. From this subtab, you'll be able to 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.


ACCOUNT
Microsoft Corporation
Annual Revenue
No. of Employees
118,000
Owner
INSIGHTS
RESEARCH
FIND CONTACTS
FAMILY TREE
TECH PROFILER
Financials
INCOME STATEMENT
ANNUAL DATA
All numbers in Millions of USD (except per share items)
Revenue
Net Income
Profit margin (%)
112800
84600
56400
28200
0
48%
36%
24%
12%
0%
2010
2011
2012
2013
2014
2015
SEC FILINGS
8-K - Current Report (Aug 5, 2016)
10-K - Annual Report (Jul 28, 2016)
8-K - Current Report (Jul 19, 2016)
8-K - Current Report (Jul 7, 2016)
8-K - Current Report (Jun 13, 2016)
10-Q - Quarterly Report (Apr 21, 2016)
8-K - Current Report (Apr 21, 2016)
11-K - Annual Report of Employee Stock Purchase, Savings and Similar Plans (Mar 25, 2016)
8-K - Current Report (Mar 17, 2016)
8-K - Current Report (Sep 11, 2015)
8-K - Current Report (Aug 7, 2015)

Chapter 6: Find contacts

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

Find contacts tab

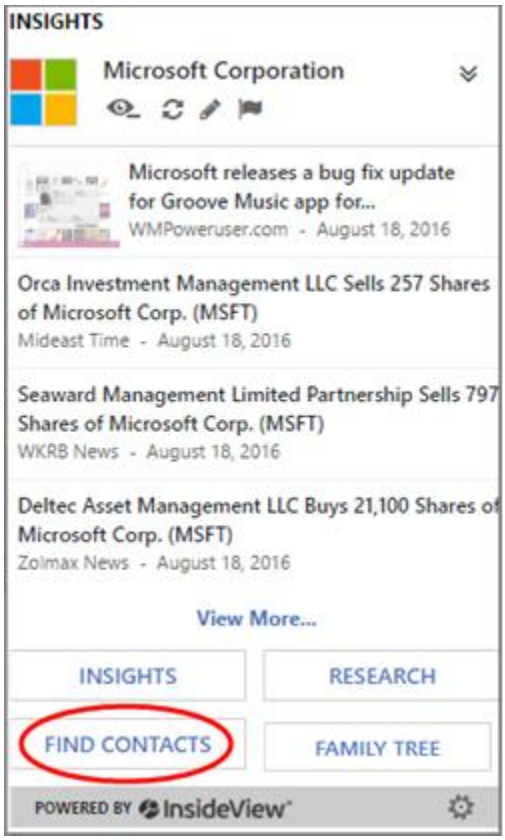
The **Find Contact** tab helps you sell more effectively by directing you to the right contact, identify your mutual connections, and learn more about them so you can quickly and easily establish rapport and build credibility. These are some things you can do from this tab:

- 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 a contact to your Watchlist.

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 Company Insights page.



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

3. On the Find Contacts page, you can search for a contact and add them to a Watchlist.

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 firmographic data for that contact. You can collapse the Preview pane by clicking the **Show Firmographics** button.

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.

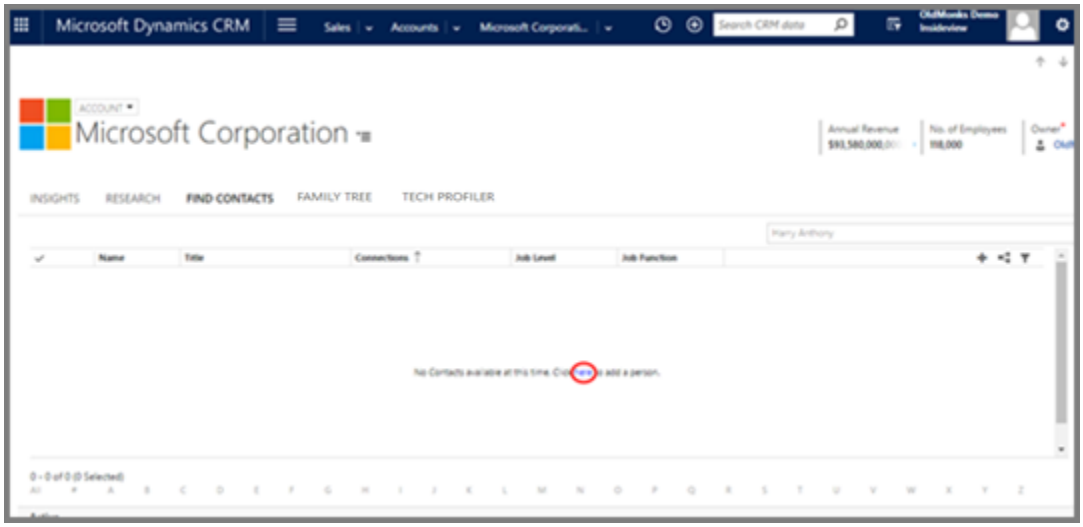
- Add a contact/person to the Insights database.
- Add a contact to Dynamics 365 or CRM Online.
- View your connections to the person.
- Add the person to your Watchlist.
- Filter the view by job functions and levels.

Add a Contact in Insights Database

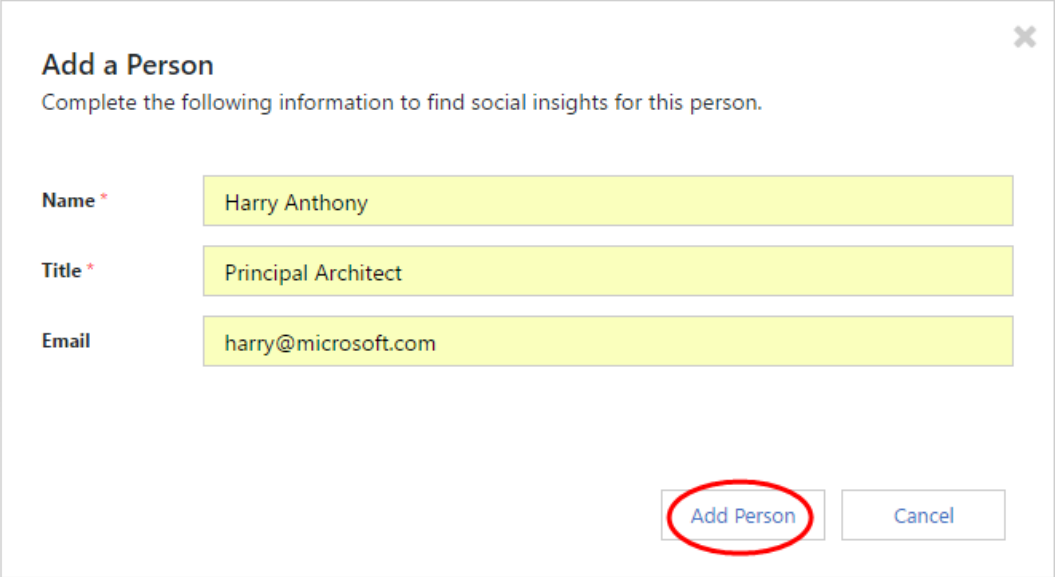
If you do not find the name of a contact/person in your search results, you can add the basic details of the contact in the database. These additions will be reviewed and researched by our team and updated to show up in search results.

The Preview pane lets you add a person, who does not exist in the Insights database. Here's how:

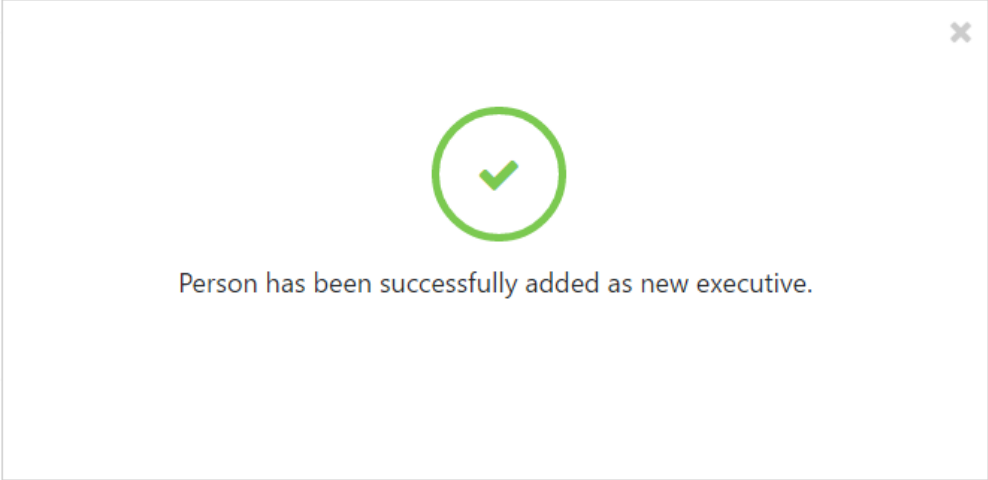
1. Go to the Find Contacts page and enter a contact's name to search.



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.



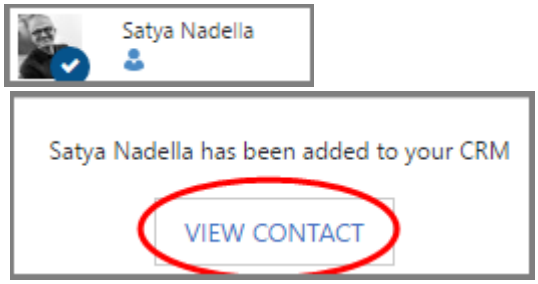
Add as contact in CRM

The Preview pane allows you to add a contact to your Dynamics 365 or CRM Online environment. Here's how:

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

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

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



4. To view the contact details in your Dynamics 365 or CRM environment, click **View Contact**.

Add a contact as a lead

The Find Contact page lets you add a contact as a lead in Dynamics 365 or CRM. Here's how:

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

2. To add the contact as a lead, click the **Add as Lead to CRM** button .

3. The **Lead** button appears below the contact's name and you will see a **View Lead** button, once the contact is added.

4. To view the lead details, click **View Lead.**

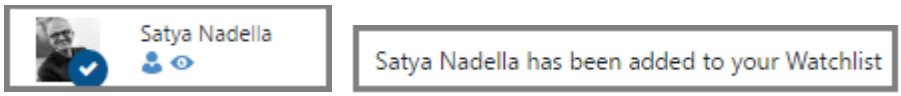
Add to a contact to a Watchlist

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.



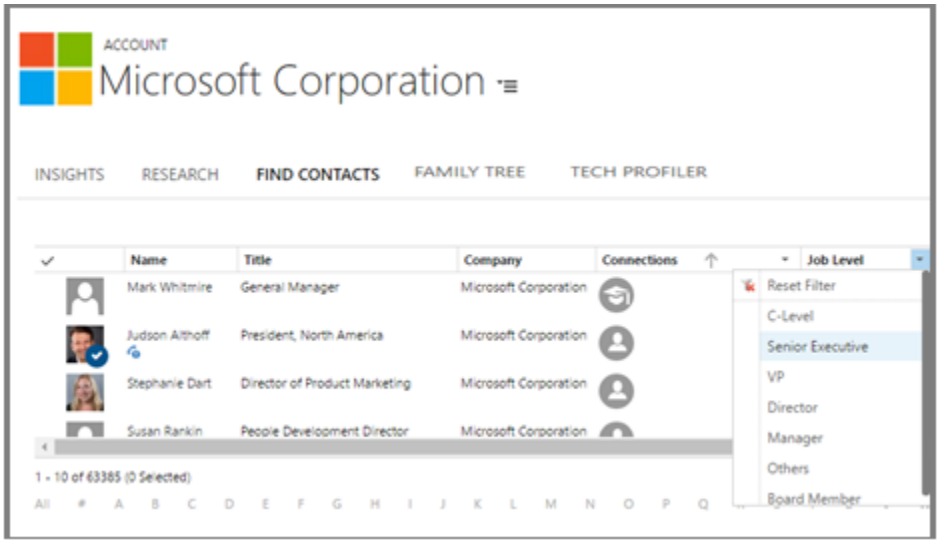
Search for and filter contacts

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

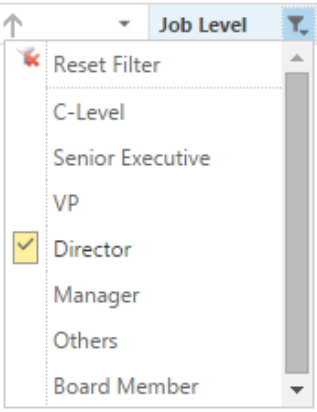
1. Go to the Find Contact page.

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

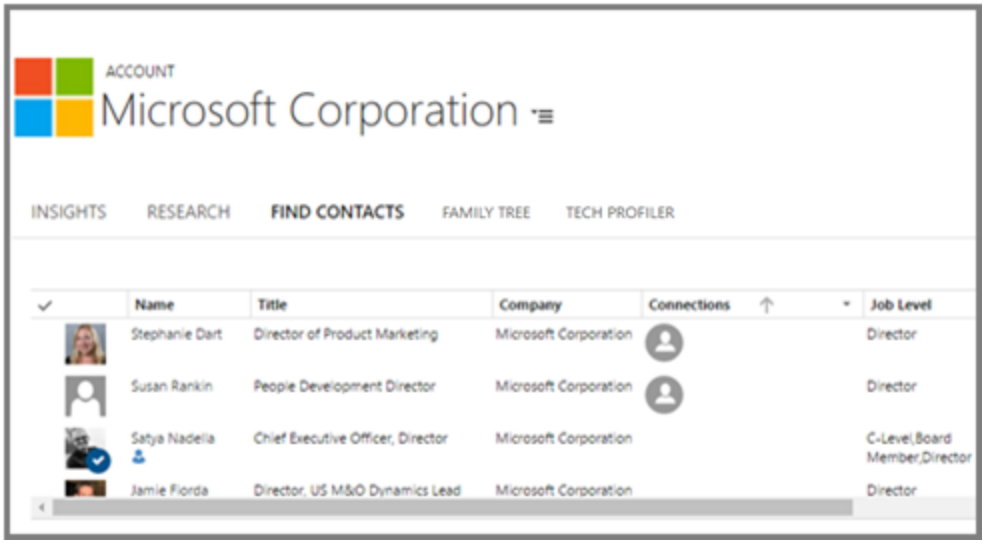
3. To filter the contacts based on the job level, click the **Job Level** column.



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

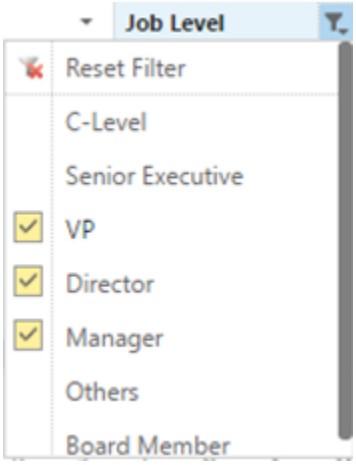


5. The results display all executives with job levels that you just selected.



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

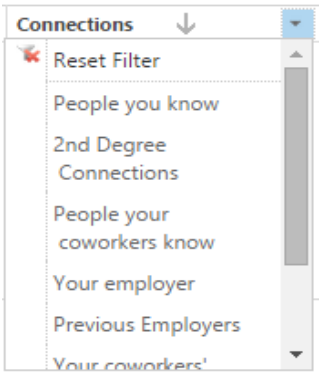
9. Clear all check boxes to see all contacts.

Connections

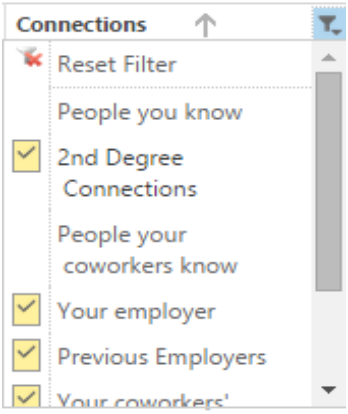
The Find Contacts page allows you to view how you are connected to a particular contact in a company. Here's how:

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.



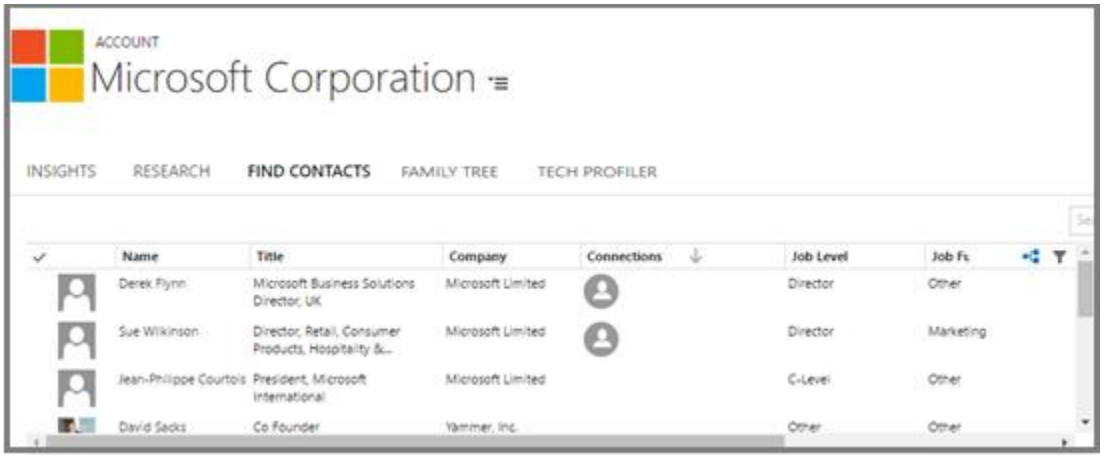
4. Use the up and down arrows to sort the contacts.

View a contact's family tree

Another interesting thing you can discover from the Find Contacts page is a family tree of contact's company. Here's how:

1. Go to the Find Contacts page, and then click the **Family Tree** button to see a contact'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 .

Chapter 7: Family Tree

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

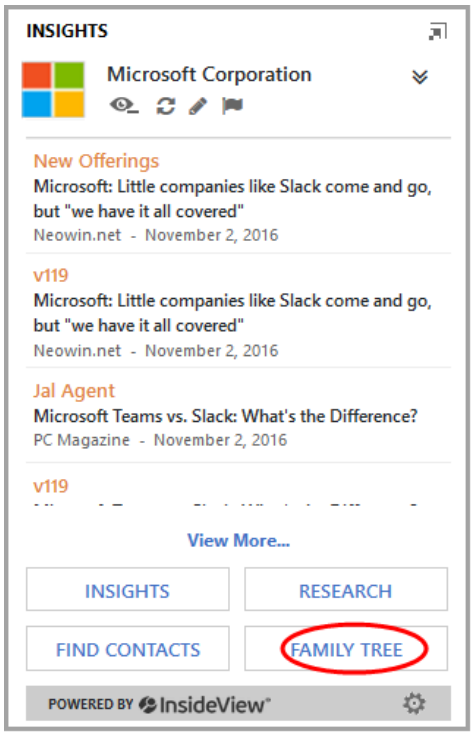
Family Tree tab

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

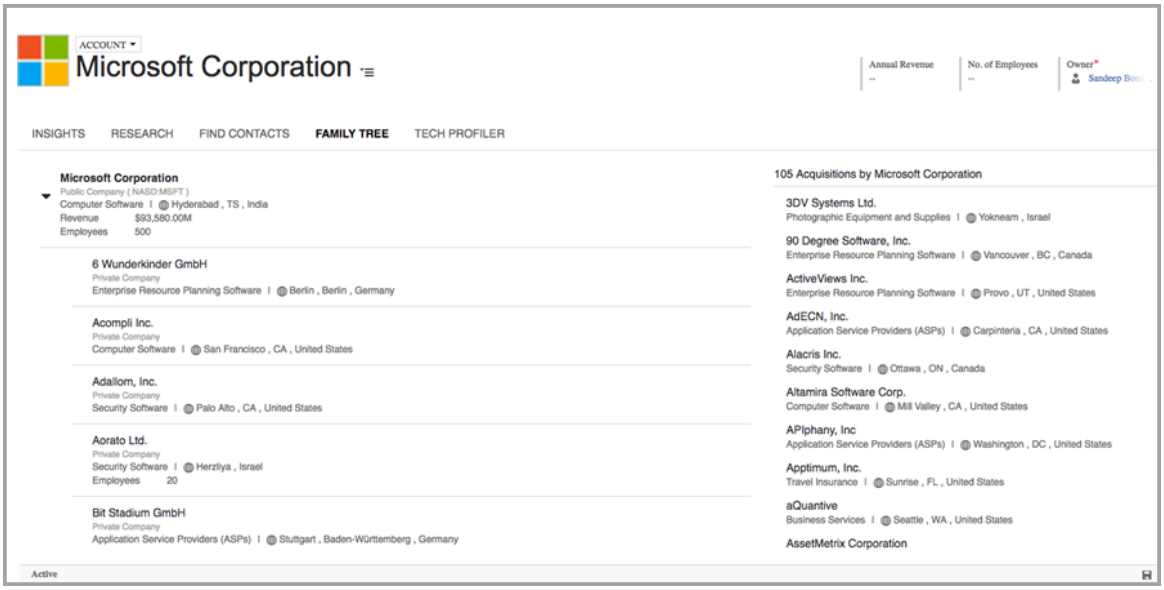
Getting to the Family Tree page

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.

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

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

Chapter 8: Tech Profiler

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

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.

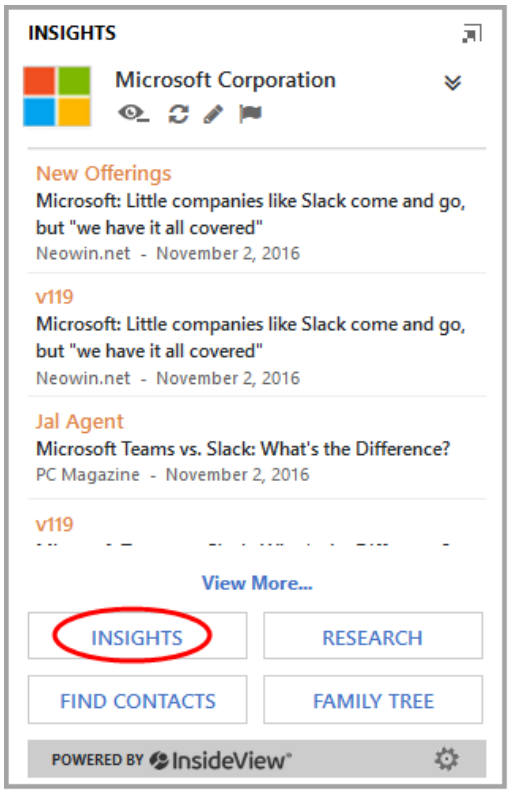
IMPORTANT: Tech Profiler is an add-on to Insights, powered by InsideView. In Insights solution, it appears only when you purchase Tech Profiler add-on for your Insights account separately as an additional tab on the Company Insights page.

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.

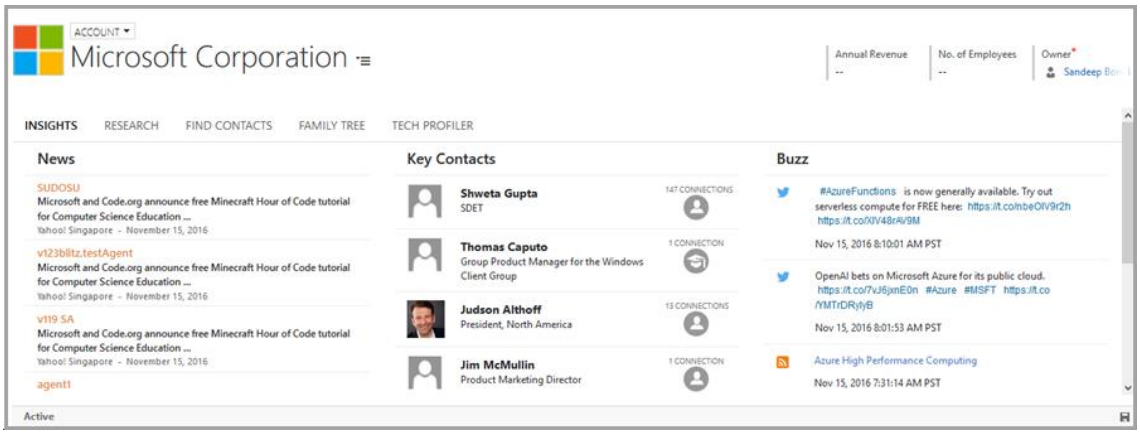
Getting to the Tech Profiler page

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

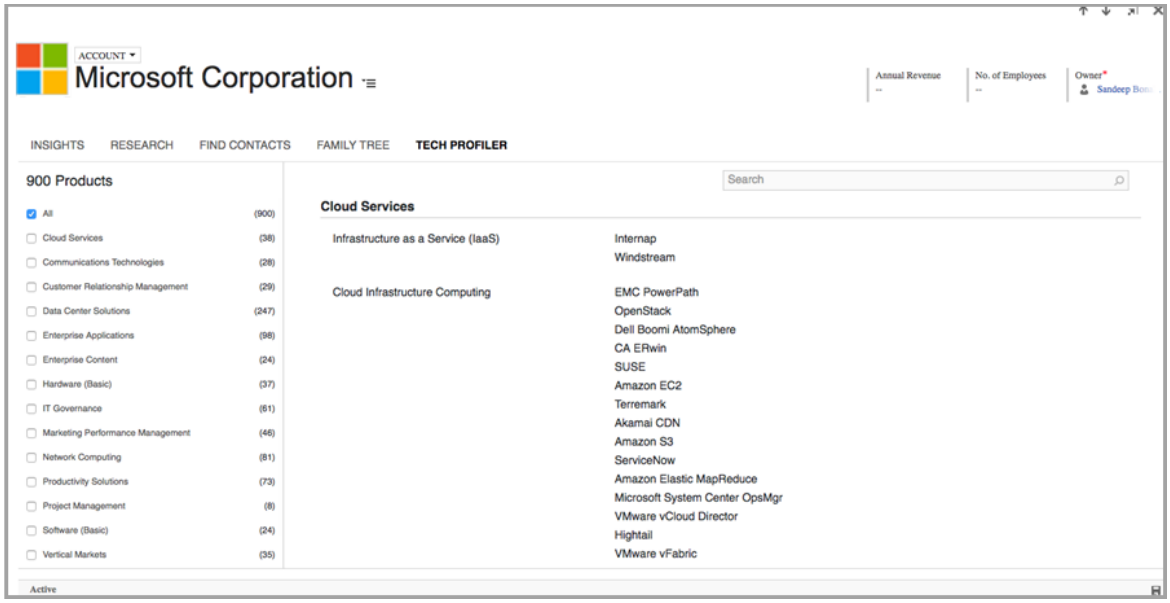
1. Go to the Company Insights page.



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

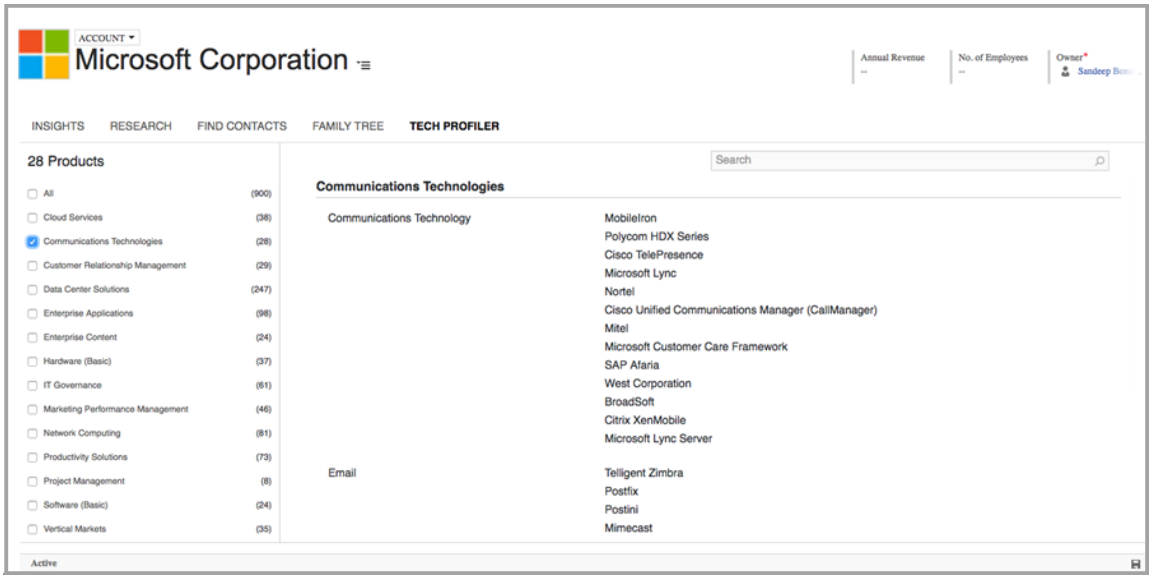


3. On the Company Insights page, select the **Tech Profiler** tab to view insights about technologies that a company is using.

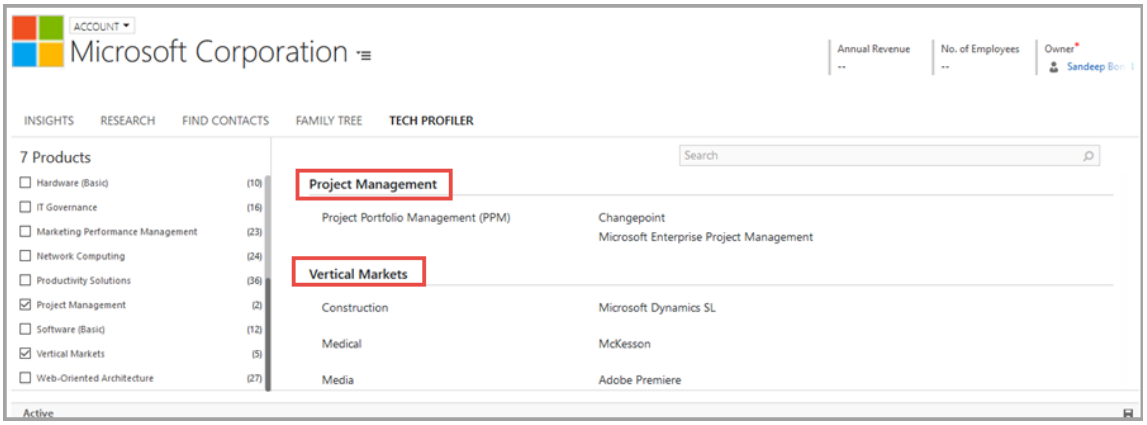


Note: Scroll to down to view all technologies and companies that are using it in the **Tech Profiler** tab.

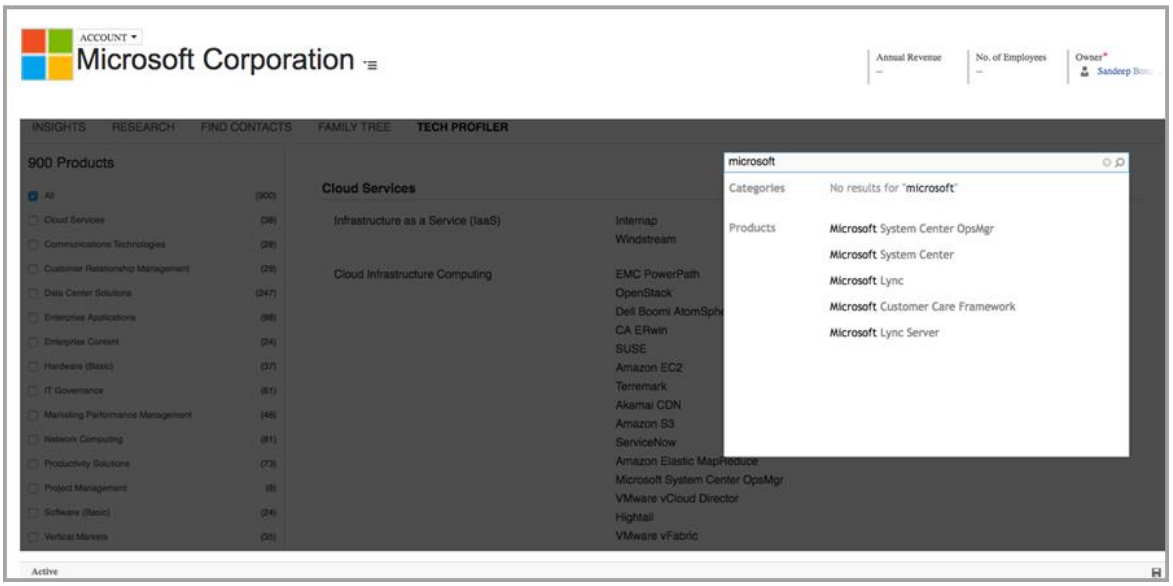
4. To view the companies that are using a specific technology, select the **Technology Name** check box. For example, if you want to view all companies that using **Communication Technologies**, select that check box.



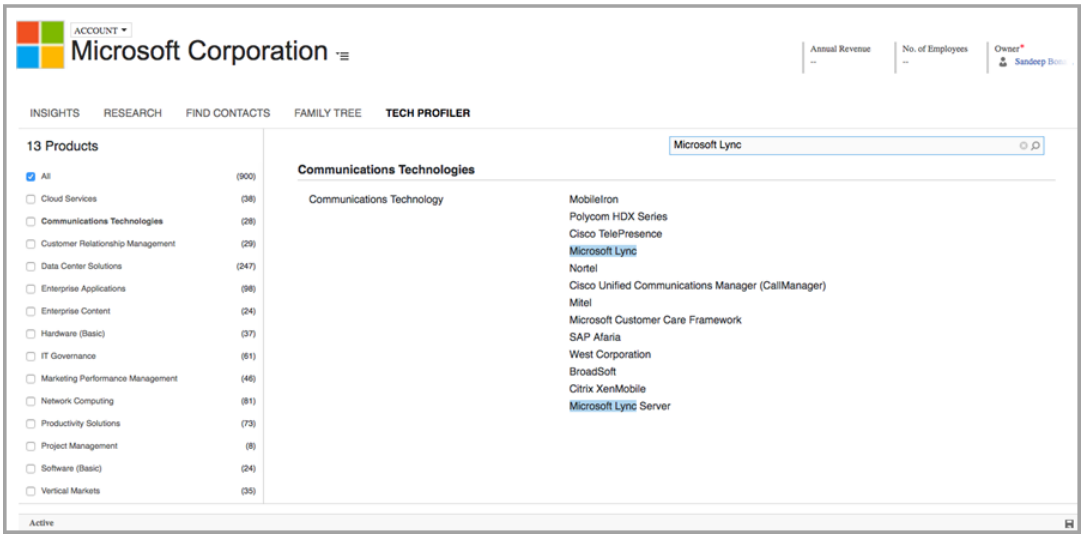
5. Select multiple technology name check boxes to view companies that are using those technologies.



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.



Chapter 9: Discovery Center

Insights, powered by InsideView offers the *Discovery Center,* which lets you research a company. 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 "Activity Stream" that tracks and displays various activities that any user completes on the go. The Activity Stream shows all latest activities that you have performed on a weekly basis and you can also view the news feed about companies you are following using the Watchlist tab.

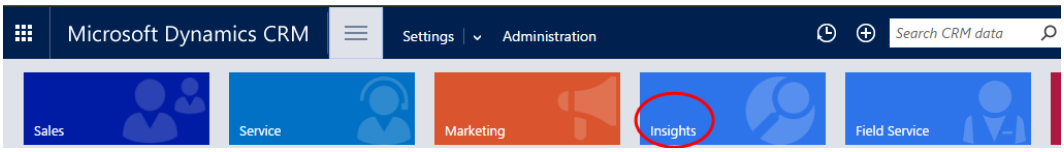
Note: In the Discovery Center, you can research a company even without adding the company data to Dynamics 365 or CRM Online.

Getting to the Discovery Center

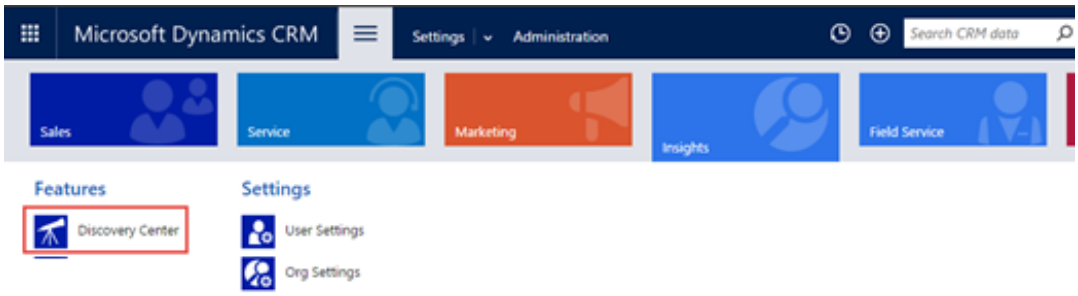
You can launch the Discovery Center from the Dynamics 365 or CRM Online tile menu. The Discovery Center launches a search page where you can enter the company names that you want to find. Here's how:

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

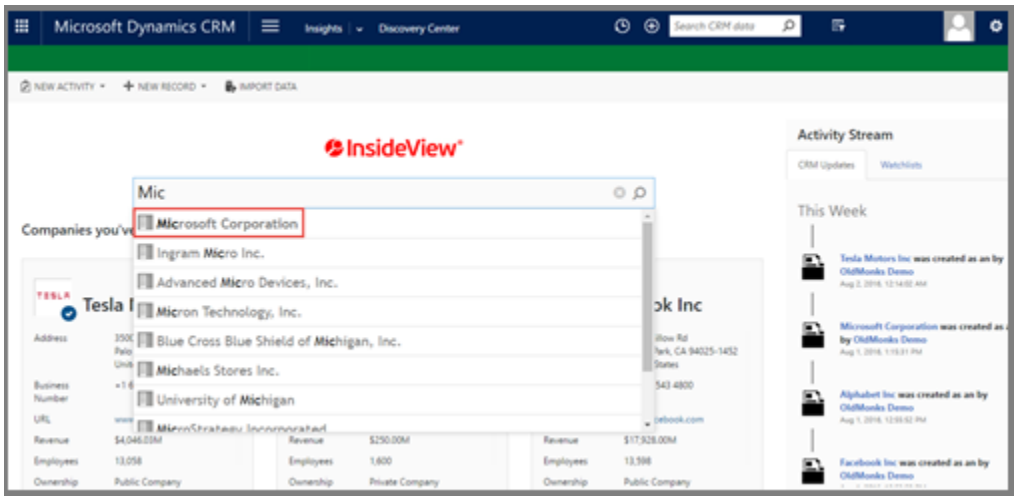
2. Go to the **Insights** work area.



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

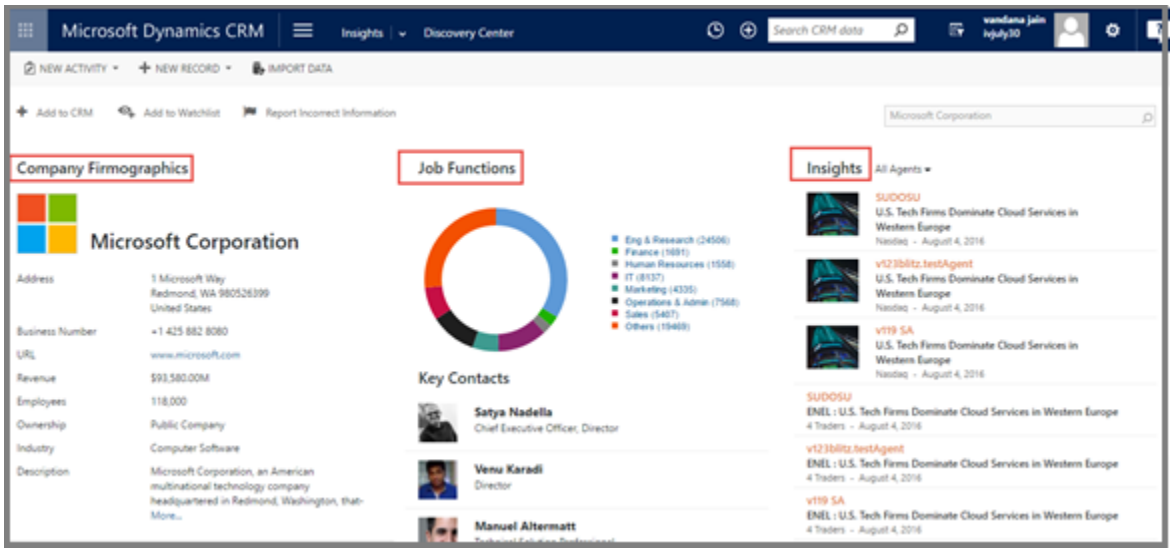


4. In the Discovery Center page, enter name of the company that you want search.



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

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.

Discovery Center Functions

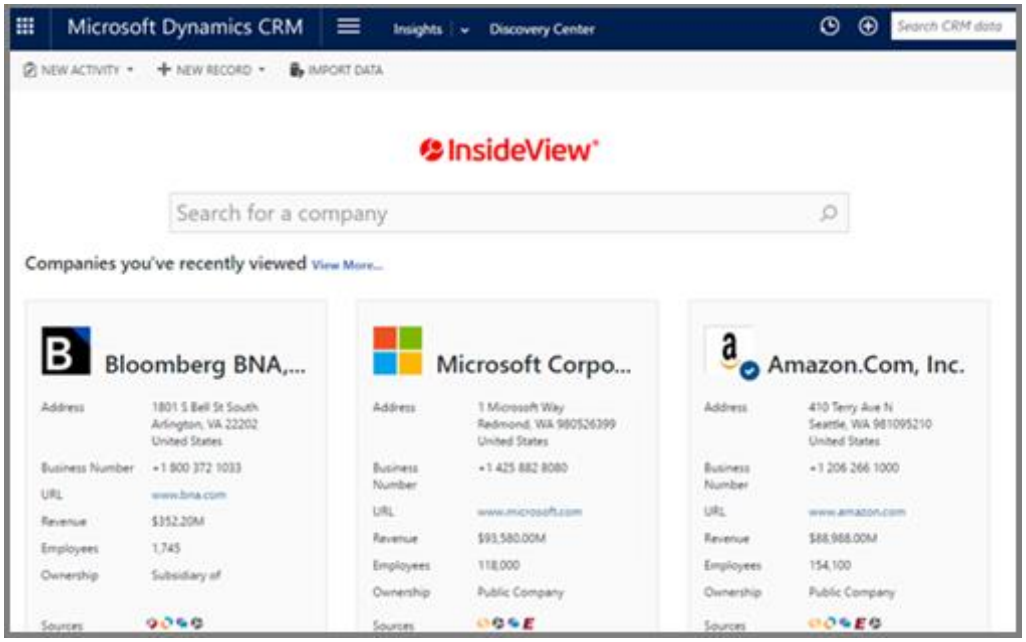
The Discovery Center offers an interactive Company Details page where you can see the required prospect information that will help you start your business conversations. The Discovery Center lets you do the following:

- View or add company account details
- Add a Company to a Watchlist
- Report incorrect company information
- View contacts and their job function
- Modify the agents for company insights
- Search for the company name

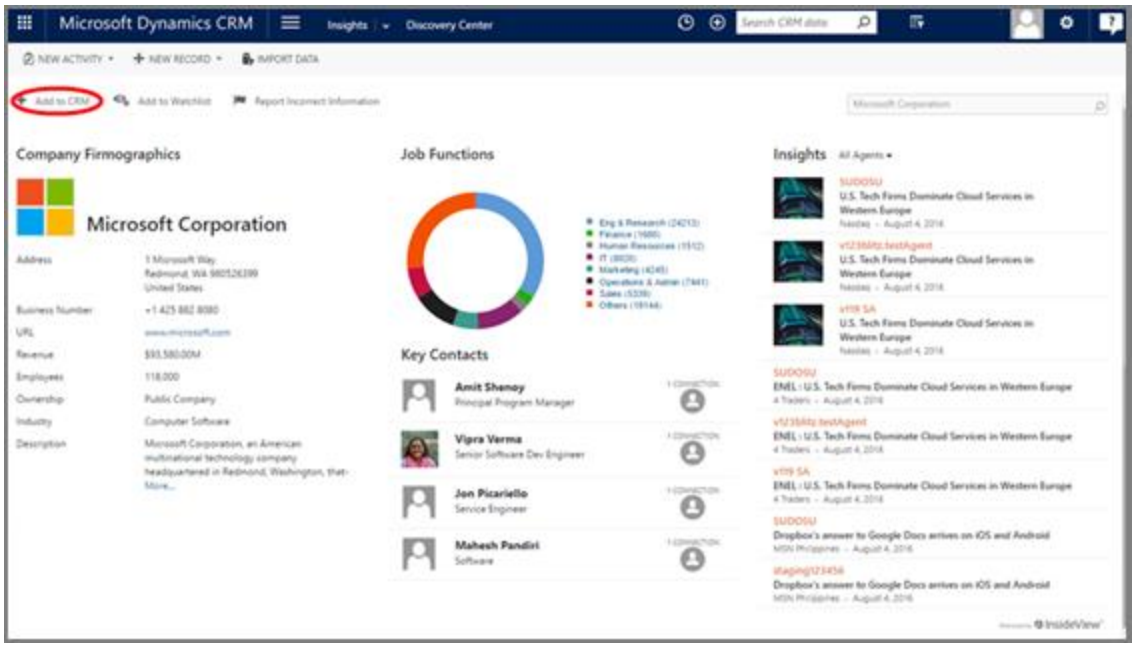
Add a Company

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

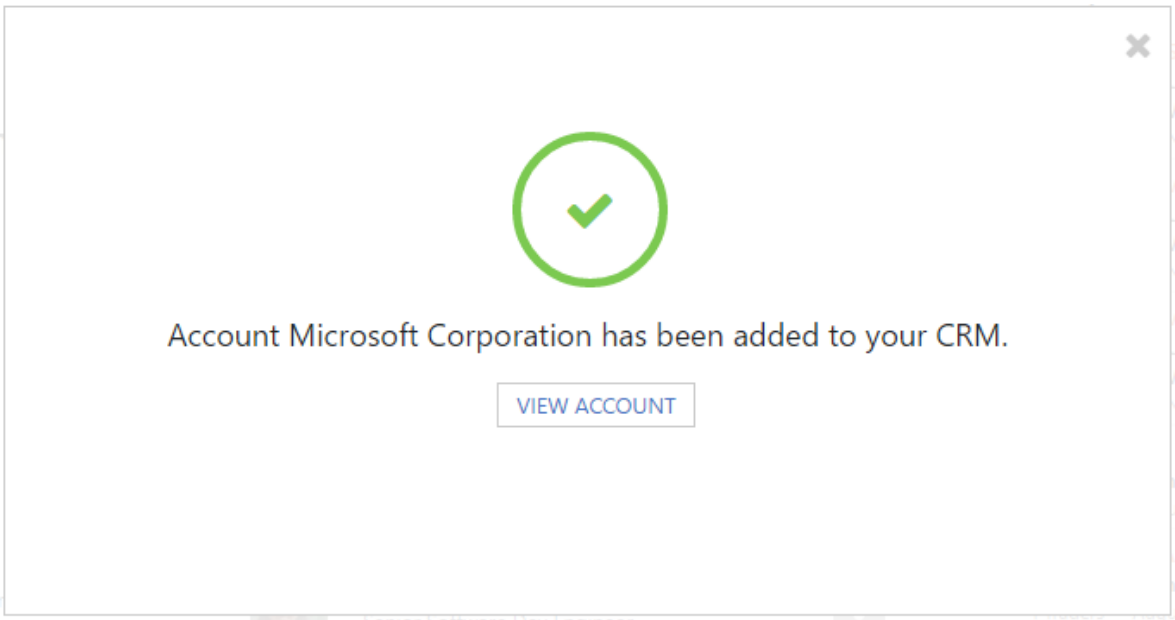
1. Go to the Discovery Center and search for a company. For example, search for Microsoft Corporation.



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 or CRM Online and the **View Account** button appears.

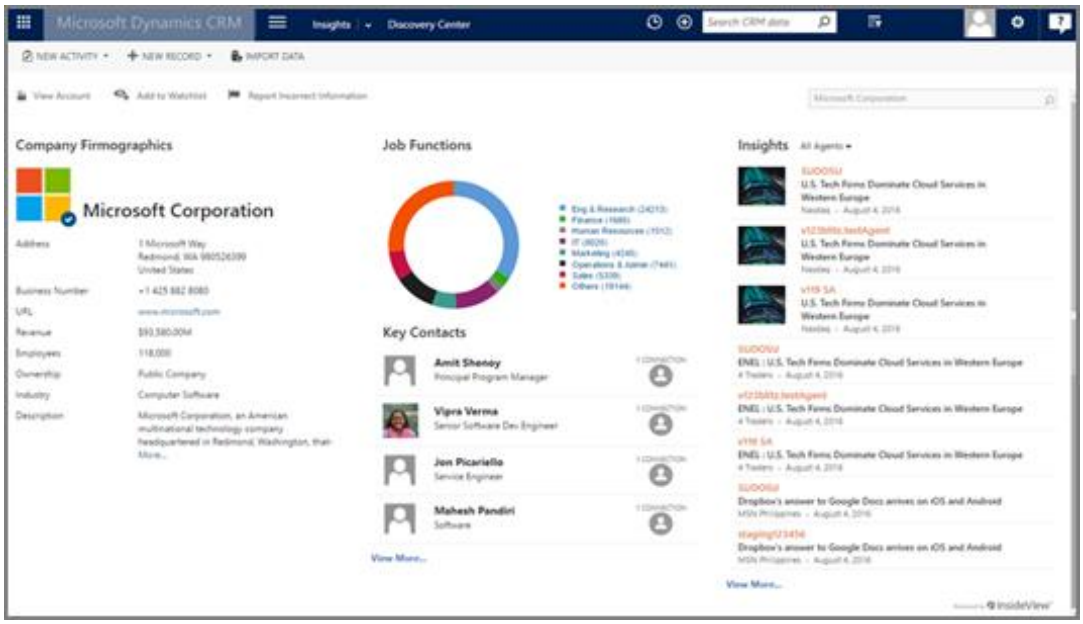
   Note: You can also add a company by clicking the **Add to CRM** button in the search results and the Company Preview pane. Read the [Add a Company from Company Preview Pane]() for more information.

View a Company Account Details

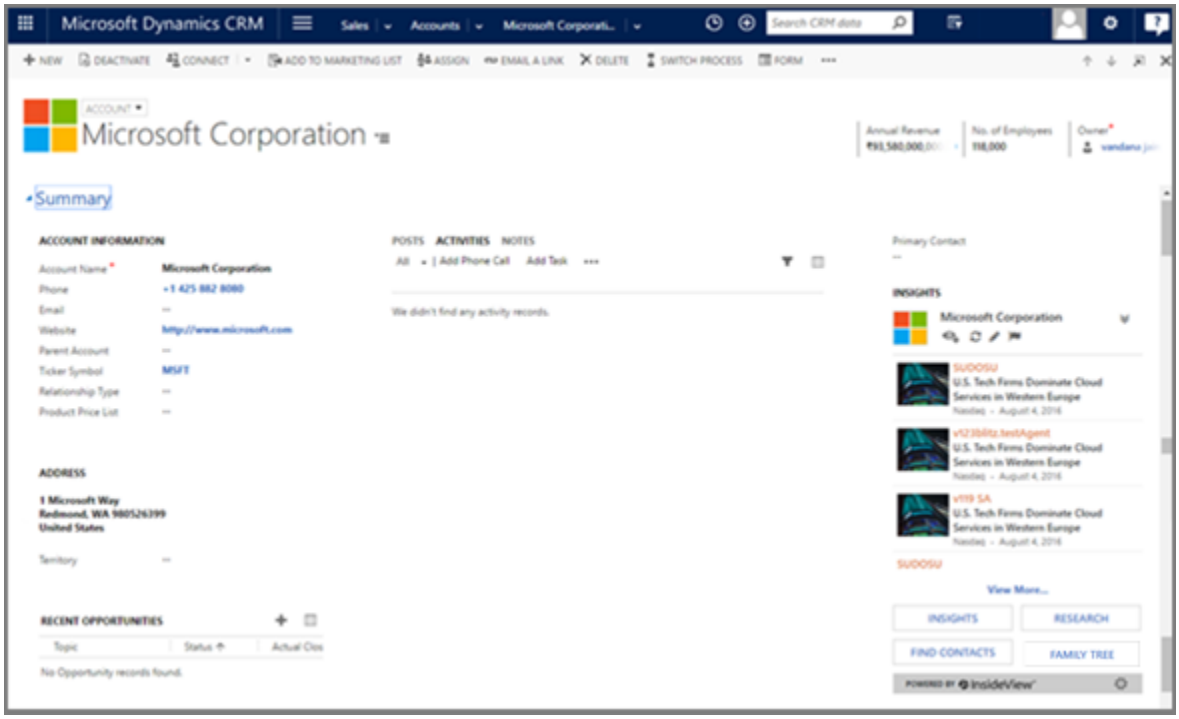
The Discovery Center company details page allows you view account details in Dynamics 365 or CRM Online. Here is how:

Note: You can only view the account details page if the company is added to your Dynamics 365 or CRM Online environment. Read the Add a Company section for more information.

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.



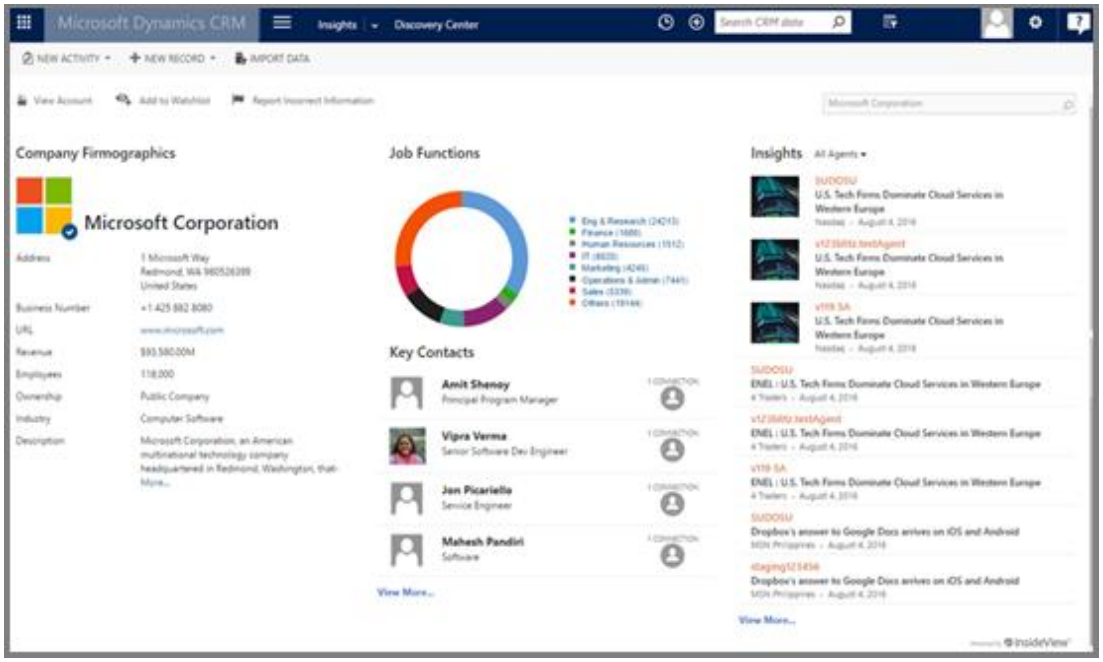
3. You can view account details here or use the company account view to take a deep dive on this company.

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.



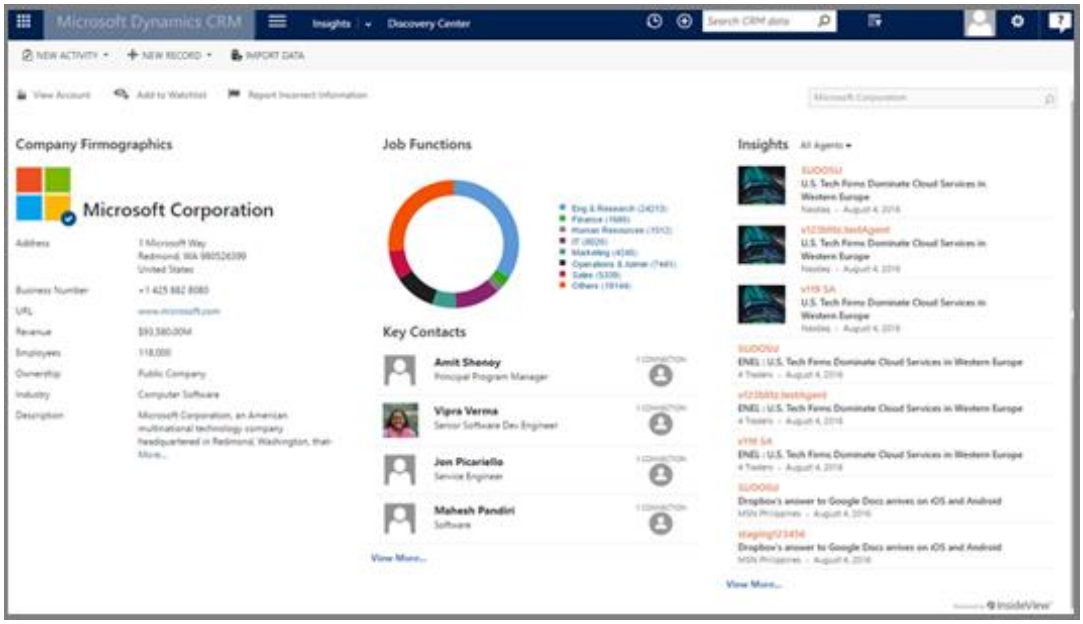
2. Click the **Add to Watchlist** button to add a company to a Watchlist with one-click.

Report incorrect information

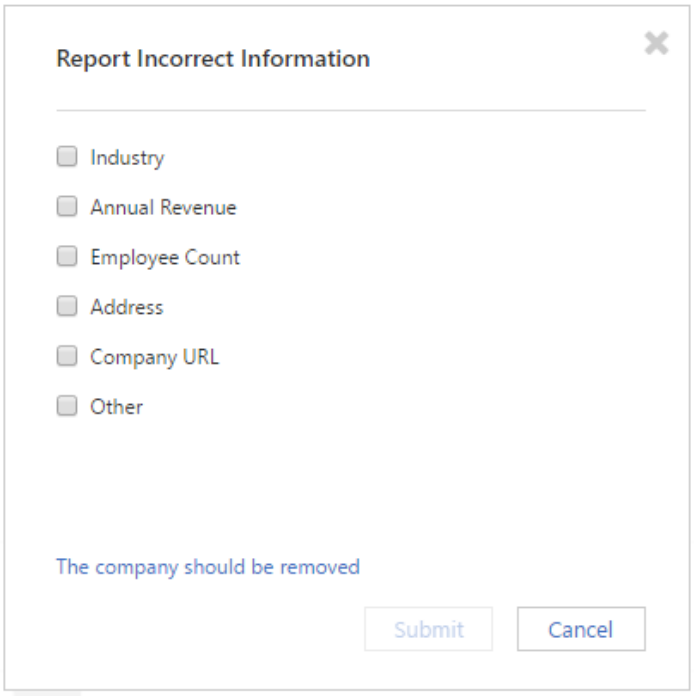
The **Report Incorrect Information** button lets you report company information that you believe is incorrect.

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.

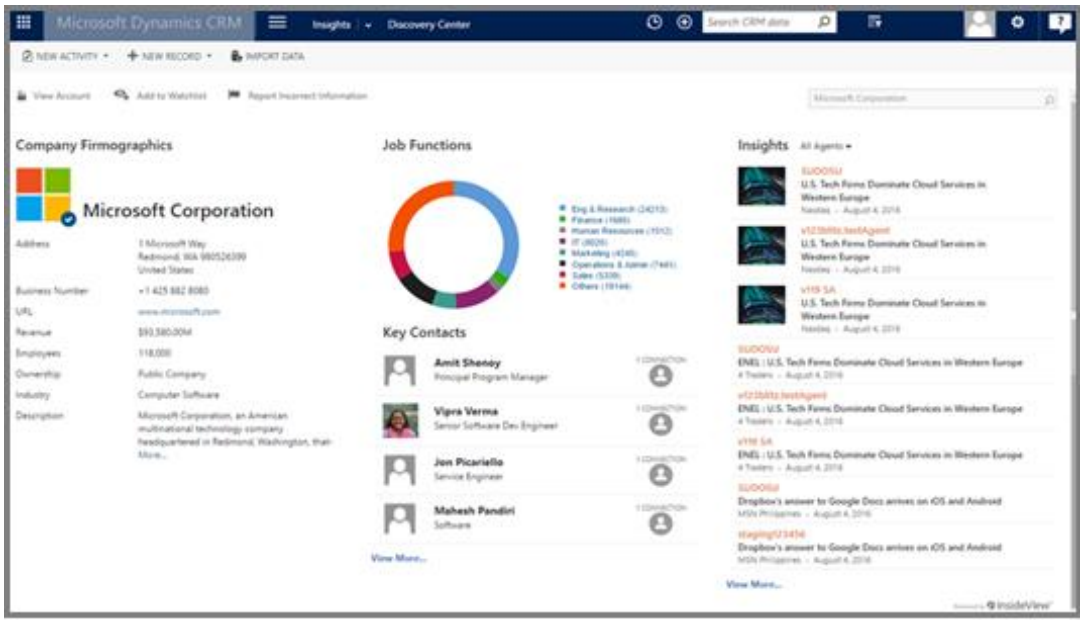
4. If you believe the company should not be displayed, then click **The company should be removed** link.

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.

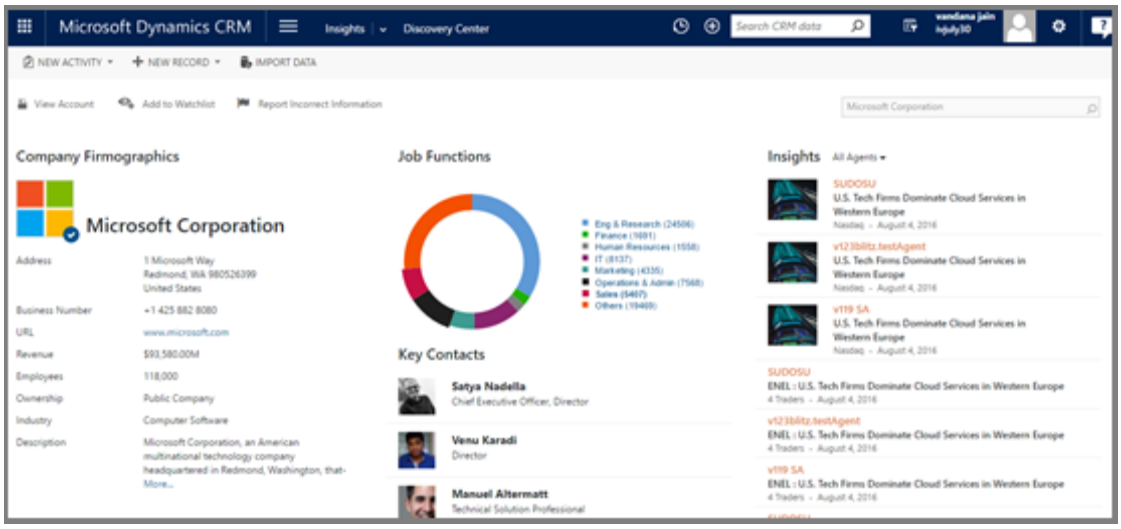
   Note: The **View More** link is visible only when the company is added to your Dynamics 365 or CRM Online environment.

4. Read [Chapter 6: Find Contacts](#) for more information.

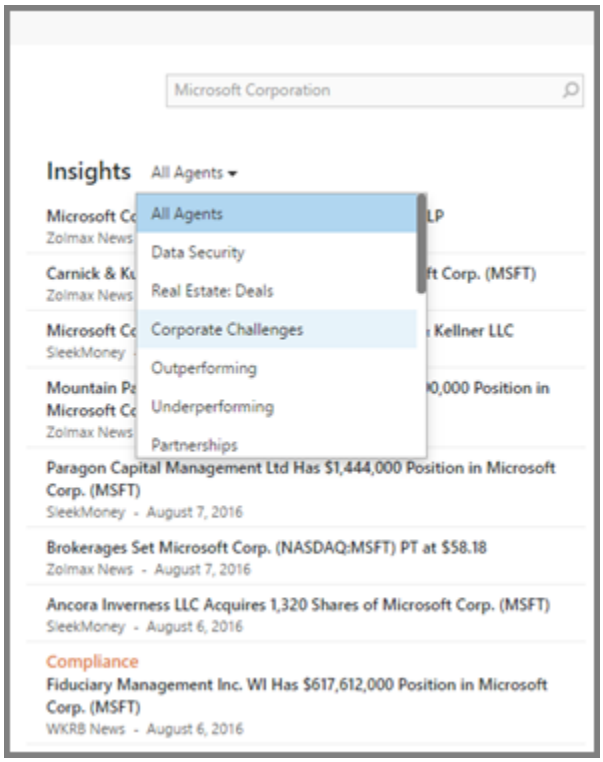
Modify the Agents for Company Insights

Insights, powered by InsideView 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:

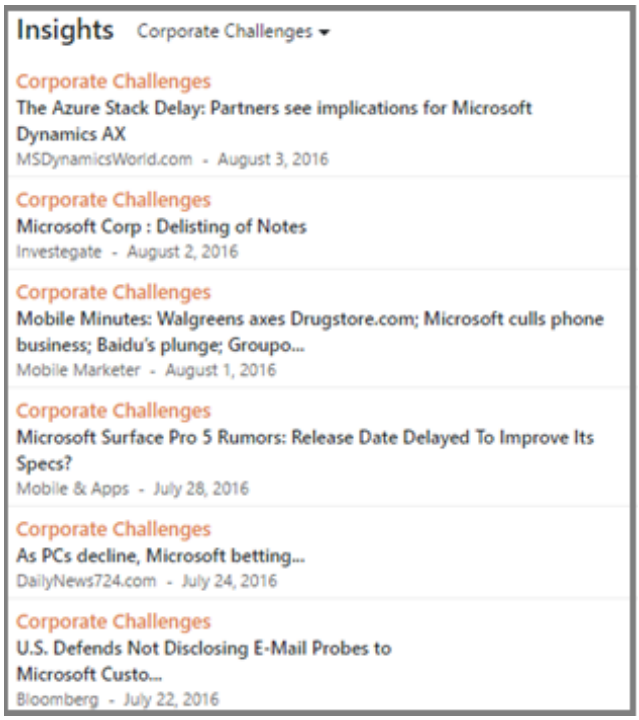
1. Go to the Discovery Center and search for a company. For example, search for Microsoft Corporation.



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.



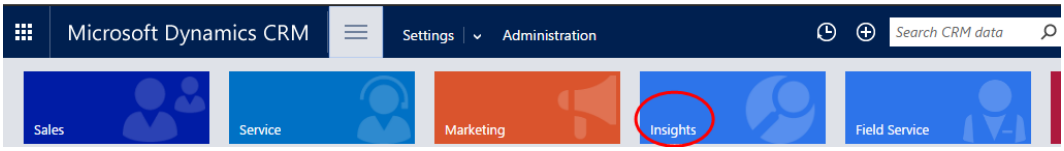
4. Read the [Set up you company insights]() section for more information.

Getting to Company Preview Pane

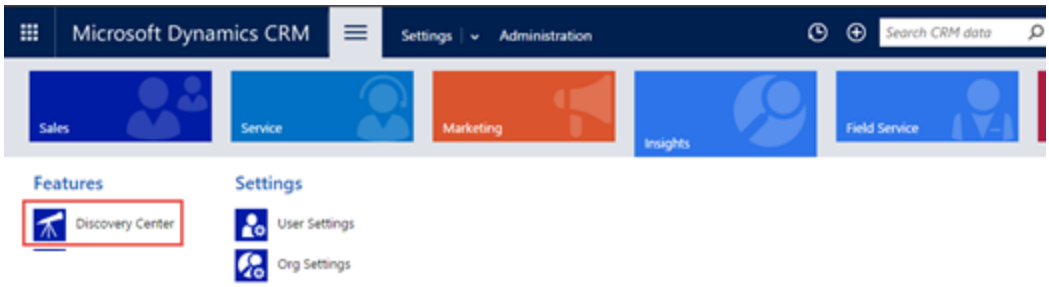
You can launch the Company Preview pane using the search option when you enter the name of the company that you are looking for. Here's how:

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

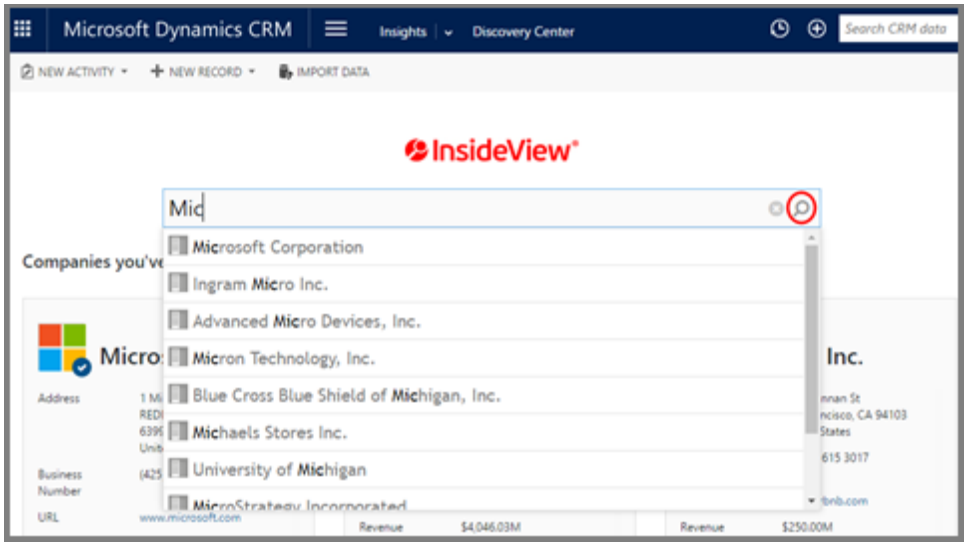
2. Go to the **Insights** work area.



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

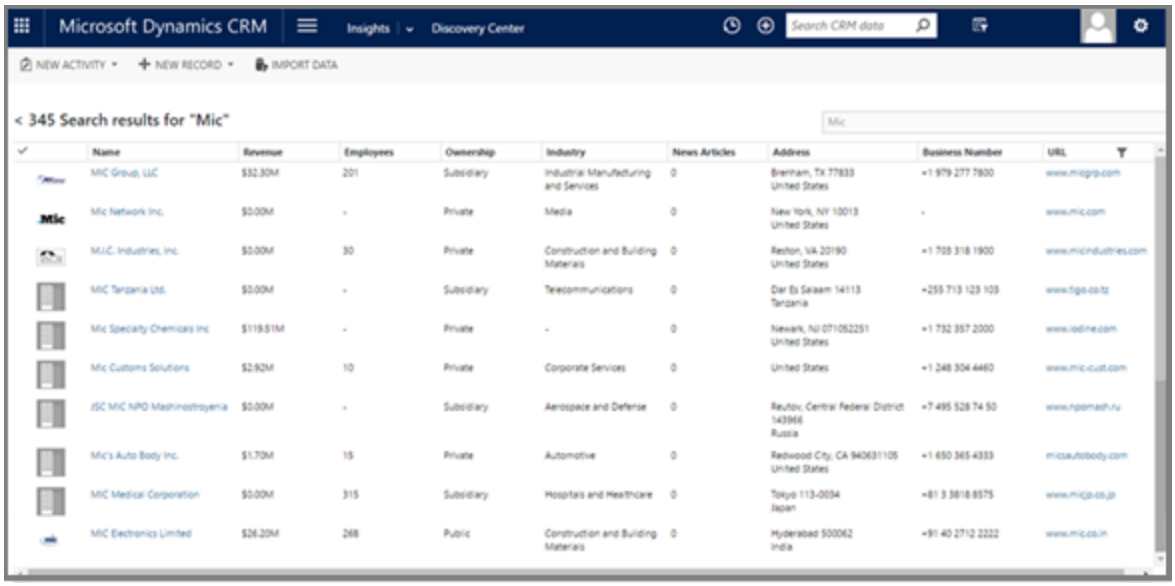


4. In the Discovery Center page, enter few letters of the company name that you want search for.



For example, if you type **Mic** in the search area, all company 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.



Company Preview pane functions

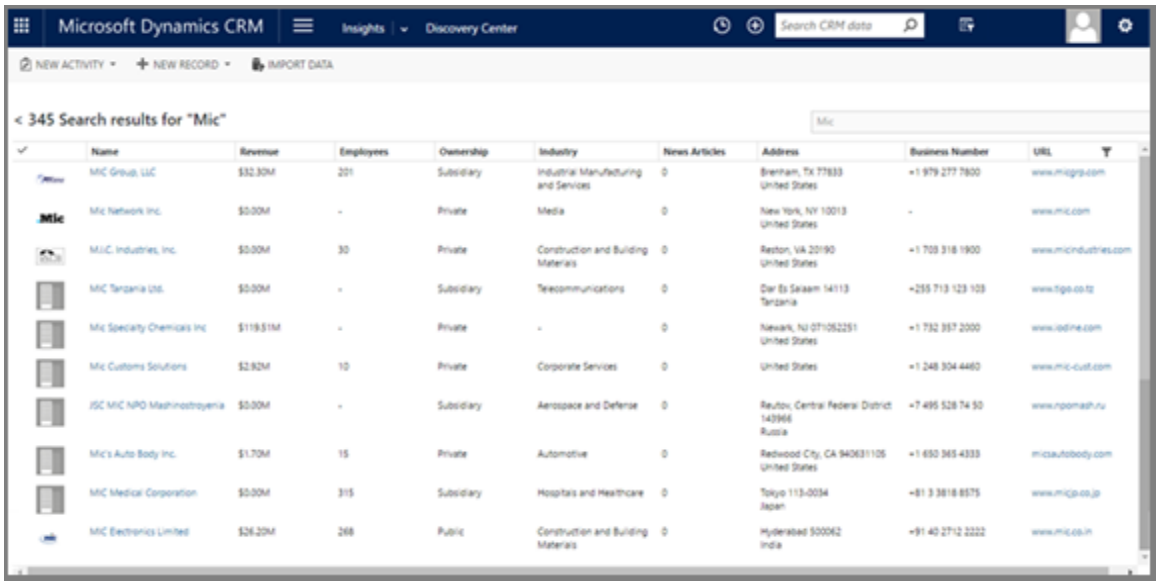
The Company Preview pane shows you the firmographic data about a company and lets you do any of these things:

- 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 or CRM Online environment.
- Add a company to your Watchlist.
- Add multiple companies to Dynamics 365 or CRM Online environment and your Watchlist.

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.



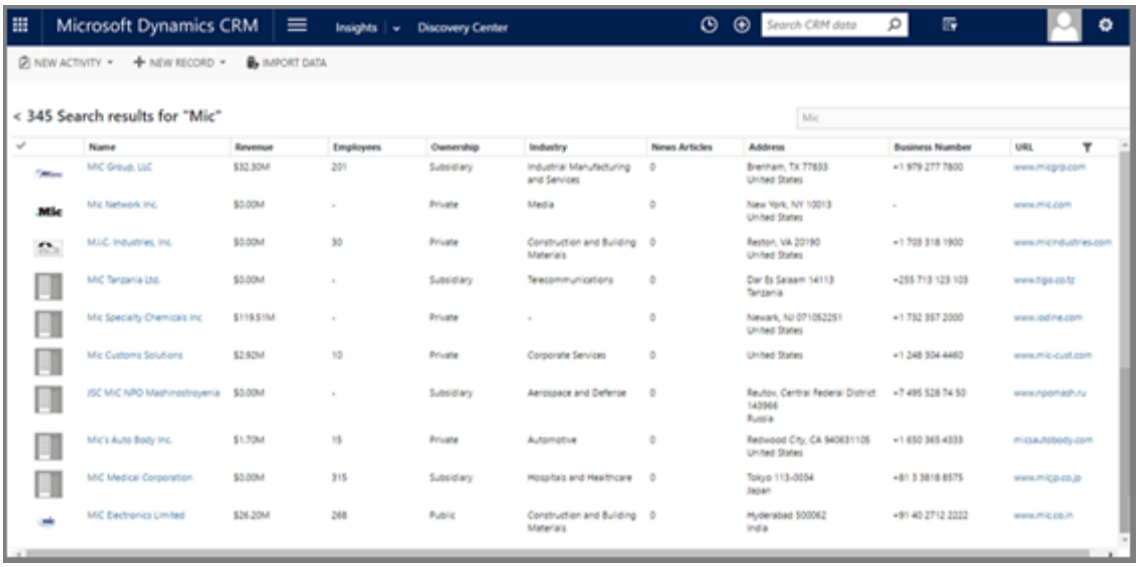
2. When you select a company, the firmographic data is populated in the right pane.

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

Add a Company from the Company Preview Pane

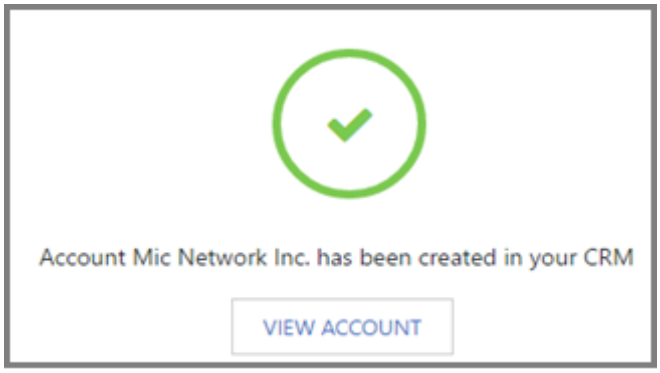
The Company Preview pane allows you to add a company to your Dynamics 365 or CRM Online environment. Here's how:

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 or CRM Online environment and you will see the **View Account** button.

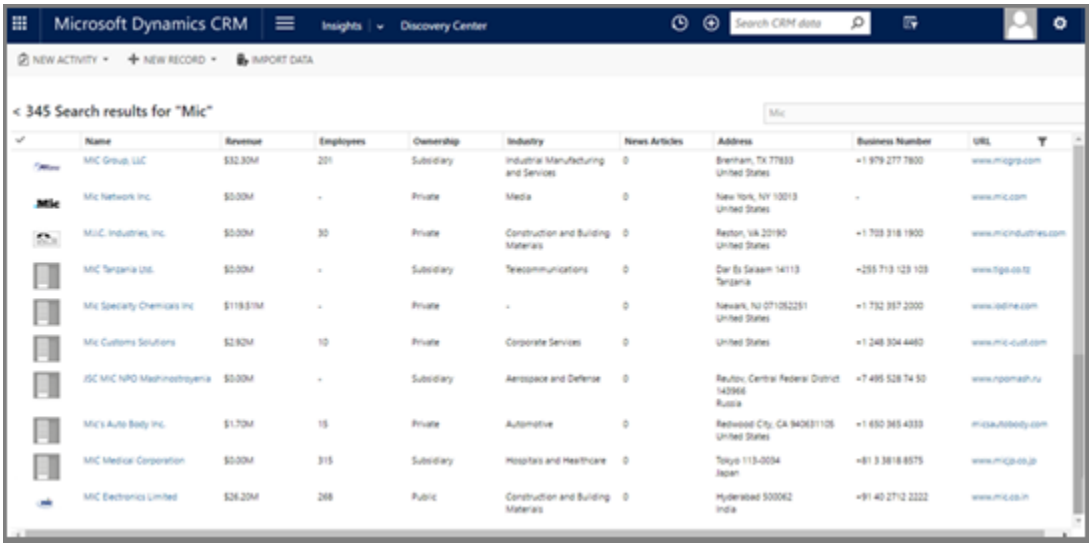


4. To view the company details, click **View Account**.

Add a Company to a Watchlist

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

1. Go to the Company Preview pane.



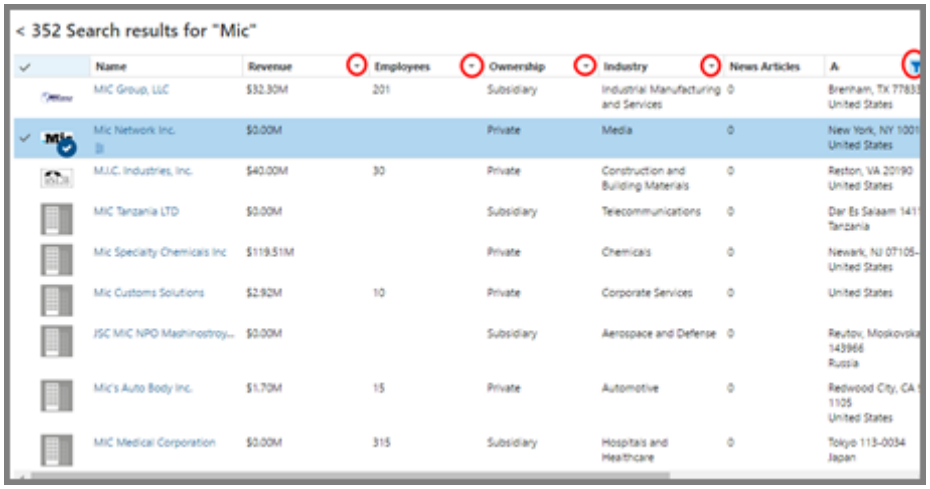
2. To add a company to Watchlist select the desired company and click the **Add to Watchlist** button .

3. The company is added to your Watchlist.

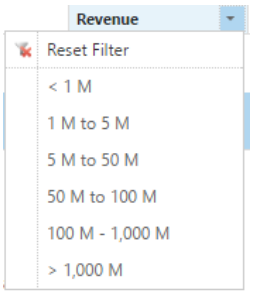
Filter Companies

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

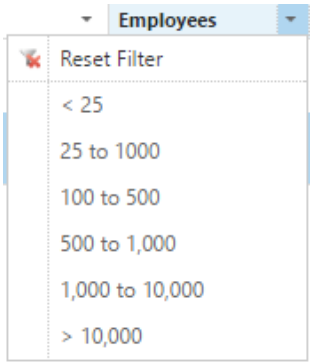
1. Go to the Company Preview pane, and then click the **Filter** button to see a filtering options.
2. The Filtering Options become visible and button changes to blue color .



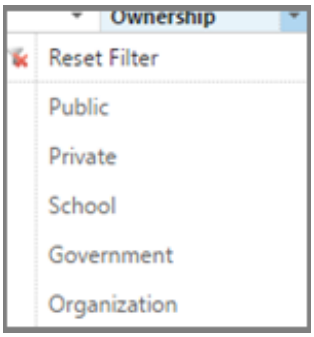
3. You can use the following options to filter your search for a company:
   - **Revenue**: select a revenue range



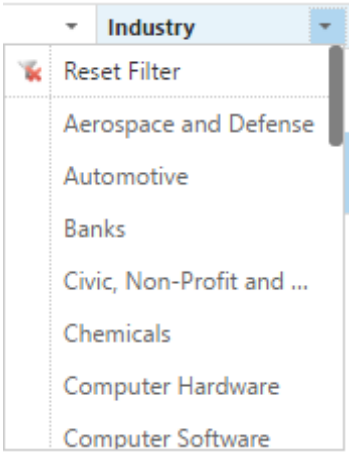
   - **Employees**: Select a range for number of employees.



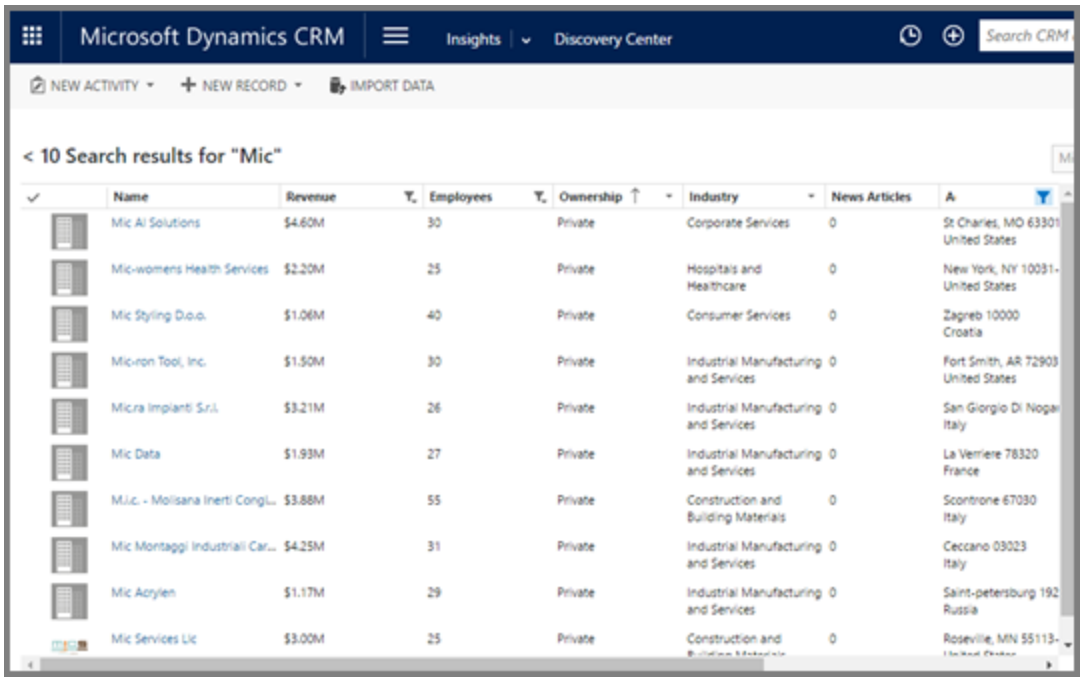
   - **Ownership Type**: select a company ownership type.



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



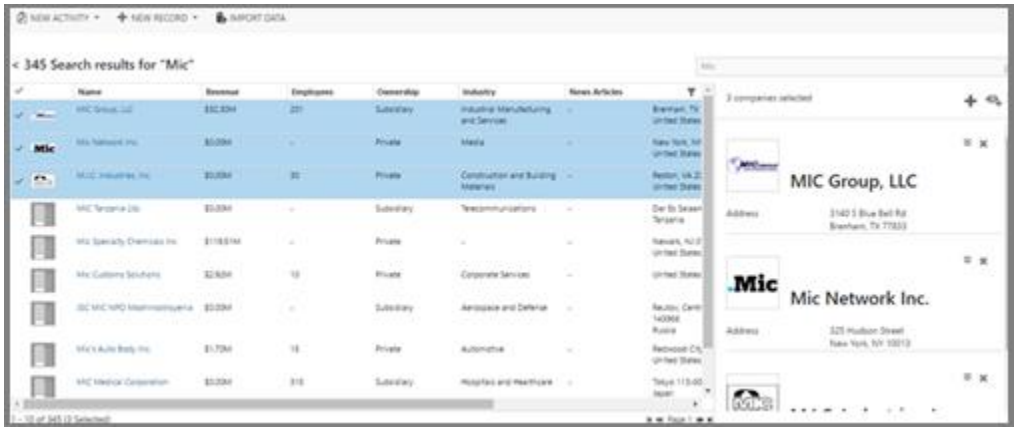
4. The company results will change dynamically as per your selection of filters.



Add Multiple Companies

You can add multiple companies to Dynamics 365 or CRM Online 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 by multiple companies.

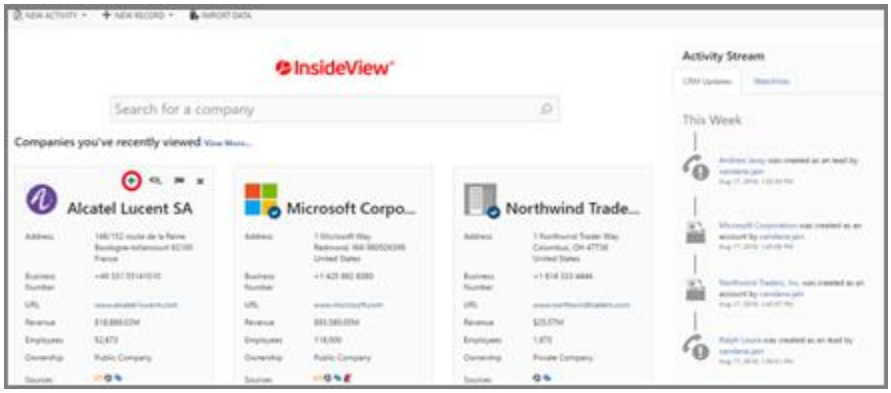


2. Complete any of these activities for the selected companies:
   - To view firmographic data, click the **Show Firmographics** button .
   - To add a company to your Dynamics 365 or CRM Online environment, click the **Add to CRM** button .
   - To add a company to your Watchlists, click the **Add to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

Activity Stream Functions

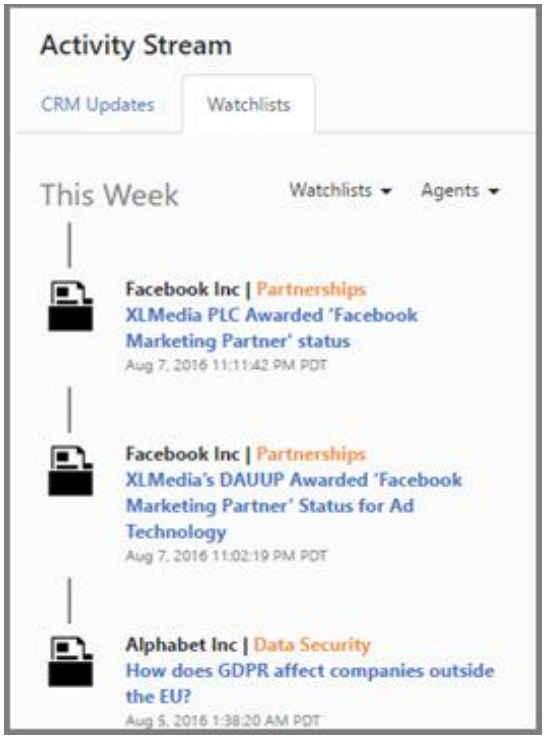
The Activity Stream shows all latest activities that you have performed on a weekly basis and you can also view the news feed for the companies you are following using the Watchlist tab. Here's how:

1. Go to the Discovery Center.



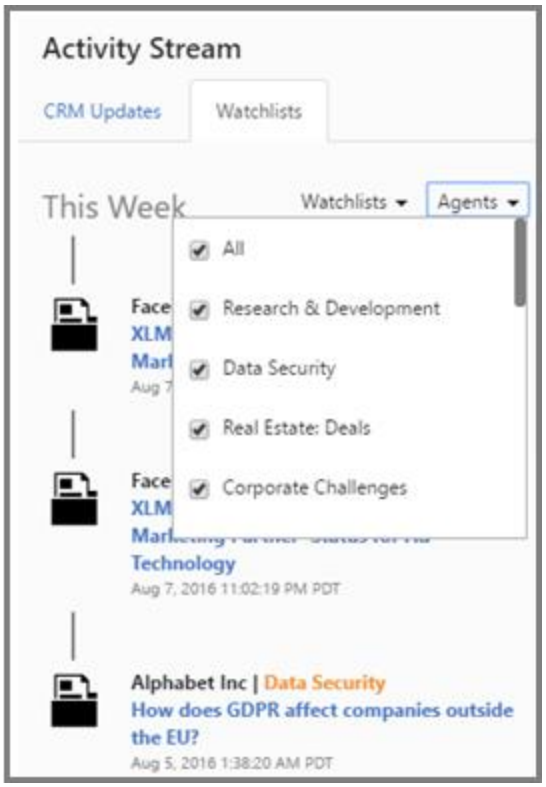
2. Click the **Add to CRM** + button to add several companies to your Dynamics 365 or CRM online environment.
3. Review the Activity Stream to the right side, which now shows the activities you have just completed.

4. Click the **Watchlists** tab to view the news feed for all the companies you are following.



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

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



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