# Table of Contents

Table of Contents.......................................................................................................................... 2
Introduction........................................................................................................................................... 3
Desktop................................................................................................................................................ 4
   First Time User Experience................................................................................................................. 4
   Search Tiles .................................................................................................................................. 4
   Pinned Item Tiles............................................................................................................................ 5
   Changing the Desktop View............................................................................................................. 7
The Global Navigation Bar.................................................................................................................... 8
   OneSource logo ............................................................................................................................... 8
   Global Navigation Search Field ....................................................................................................... 8
   User Menu.................................................................................................................................... 8
   Notifications ................................................................................................................................. 9
   Desktop........................................................................................................................................ 9
   Search & Build a List....................................................................................................................... 9
   Saved Searches.............................................................................................................................. 9
   Lists .............................................................................................................................................. 9
   Page Help..................................................................................................................................... 9
   Support ....................................................................................................................................... 10
Search Functionality ........................................................................................................................... 10
   Companies Search .......................................................................................................................... 10
   Contacts Search ............................................................................................................................. 12
   News Search ................................................................................................................................. 14
   Research & Reports Search (where applicable, based on subscription)......................................... 14
   SEC Filings Search ......................................................................................................................... 15
   Triggers Search .............................................................................................................................. 15
   Industry Search ............................................................................................................................. 16
   Conceptual Search .......................................................................................................................... 17
Search & Build a List ............................................................................................................................ 18
   Lists Overview............................................................................................................................... 18
   SmartLists Overview ..................................................................................................................... 18
   Saved Searches Overview ............................................................................................................... 18
   Applying Filters ............................................................................................................................ 19
View and Act on Results ....................................................................................................................... 20
   Refining Results ............................................................................................................................ 20
   Configuring the Results View ......................................................................................................... 20
   Available Actions for Results ......................................................................................................... 22
Lists/SmartLists and Saved Searches Pages .......................................................................................... 23
   Lists Page ................................................................................................................................... 23
   Saved Searches Page ..................................................................................................................... 25
Company, Contact and Industry Profiles ............................................................................................... 25
   Company Profile ............................................................................................................................. 25
   Contact Profile ............................................................................................................................... 30
   Industry Profile ............................................................................................................................. 32
User Menu .......................................................................................................................................... 34
   My Profile ................................................................................................................................... 34
   User Preferences ........................................................................................................................... 34
   Ideal Profile ................................................................................................................................ 36
   Usage Dashboard.......................................................................................................................... 36
   Administration Menu Items ........................................................................................................... 37
Notifications ....................................................................................................................................... 38
   Notifications Page ........................................................................................................................ 39
OneSource Customer Support ............................................................................................................. 39
Introduction

AVENTION ONESOURCE SOLUTIONS: Make every opportunity count.

Avention’s OneSource platform is designed to help companies get a deeper understanding of their market opportunities so they can make more informed decisions, stay ahead of the competition, and close more deals by combining and analyzing data from a wide variety of sources. OneSource does this with powerful features that are unique to business information solutions:

- **Conceptual Search** uses both structured and unstructured data, which allows users to search for companies and contacts based on an idea or concept. For example, a user might want to find all companies that are involved in the topic or particular discussion of “Renewable Energy” or “Big Data”.

- **Triggers** are a single actionable moment in time that creates a business opportunity. For example, a company announces it is opening 5 new facilities across New England – triggers can prompt users to reach out to this company with a strategic message based on real data from a news source, press release, SEC filing and more.

- **SmartLists** are self-maintaining lists – dynamic engines for searching and prospecting. Results are constantly added or removed as marketplace information is received relating to the criteria used to build the list. They can also push information out to users by leveraging OneSource’s Notifications functionality to appear in-product or be sent via email when changes occur.

- **Business Signals** show percentile rankings among all companies for a growing number of business facets, allowing users to hyper-segment the market to precise requirements. Signal scores are based upon press releases, business press articles and SEC filings over the past 90 days, providing precise, real-time insights. Signal scores can be seen on each company’s profile page, applied as list-building filters and are also used in Ideal Profile configuration.

- **Ideal Profile Scoring** lets users specify the business signals most valuable to them, and compares one company’s Ideal Profile against another. Business signals constantly listen, interpret, weigh and score marketplace data, helping users prioritize prospects that score the highest in the activities that matter most to you.
Desktop
Desktop is the OneSource homepage and offers immediate access to both user-specified and OneSource-controlled content.

First Time User Experience
As seen below, the OneSource Desktop presents first-time users with the option to Explore Desktop, which exposes product help tips.

These help tips are available at any time by clicking Page Help in the global navigation bar.

Search Tiles
An onboarding desktop for new users is displayed and contains search tiles for Companies, News, Contacts, Industries, Triggers, and Analysis (where applicable, based on subscription).

1. Click a tile to navigate to the respective Search & Build a List interface.
2. Unpin or move the tiles to another location on the desktop as desired.
Pinned Item Tiles

Pinning
1. Pinning is available throughout the entire platform wherever the pin icon 🌟 is present. Unpinned items display a gray pin, while items currently pinned to Desktop display a black pin. Pinned items result in desktop tiles.
2. To remove items pinned to the desktop, hover the tile and click the unpin icon ⏪ that appears in the upper right corner.

Company Tiles
Company desktop tiles include company name, industry, location, phone number, Ideal Profile Score, social media links, and recent triggers (when available).

1. Hover the trigger icon 🚨 to display the most recent triggers. All triggers can then be viewed by clicking the View All link that appears in the tile’s title area.
2. Click the company name or icon to open the full company profile.

Contact Tiles
Contact desktop tiles include contact name, job title, company name, main business phone or direct phone number (when available), email address (when available), the company’s Ideal Profile score, social media icons, and triggers (when available).

1. Click the contact name or image to open the full contact profile.
2. Click the company name to open the full company profile.
3. Click the email address to begin drafting an email.
News Tiles
News desktop tiles include article title, publication source, how long ago the article was published, and a preview of the article.

Click the title or news icon to open the full article page.

Trigger Tiles
Trigger desktop tiles include, when available, the trigger event title, category of the event, company involved, how long ago the event occurred, and the first few lines of the news item behind the trigger.

Click the title or the trigger icon to open the full trigger event.

Industry Tiles
Industry desktop tiles include the industry name, source, code, and number of companies in the Avention database associated with the industry.

1. Click the industry name or industry icon to open the full industry profile.
2. Click on the number of companies to view the list of industry participants.
Static List Tiles

List tiles include the list name, number of list items, 5 most recent items (with Ideal Profile scores, if relevant), date added, and recent triggers.

1. Click the title or the list icon to view the full list.
2. Click any of the 5 items to review them in more detail.

SmartList Tiles

SmartList desktop tiles include the SmartList name, number of list items, 5 most recent items (with Ideal Profile scores, if relevant), date added, and recent triggers.

1. Click the title or the list icon to view the full SmartList.
2. Click any of the 5 items to review them in more detail.

Changing the Desktop View

The OneSource Desktop has two different views - Tile view (default) and List view. Toggle the Tile/List icon to change the view of the pinned Desktop items.

1. Tile view shows the items in order that they were pinned to the desktop with the most recent items being at the top. To change the order of pinned tiles, drag and drop them to the desired location.
2. List view sorts items either alphabetically or by date, depending on the section. To change the order of the list sections, drag and drop them to the desired location.
3. Use the down arrows to expand/collapse sections.
The Global Navigation Bar
The global navigation bar is available throughout the entire OneSource platform. This bar is designed to streamline the user experience and provide quick access to key functionality.

OneSource logo
The OneSource logo at the top of the global navigation bar is a hyperlink to the Desktop.

Global Navigation Search Field
1. By default, Companies is pre-selected for search in the global navigation search field.
2. Click the Companies icon to choose Contacts, News, Research & Reports (where applicable, based on subscription), SEC Filings, Triggers, or Industries for a keyword search.
3. Click the Conceptual Search icon to perform a Conceptual Search.
4. See Search Functionality for more information on searching.

User Menu
Clicking the User Name link in the global navigation bar displays a menu of user-specific options for customizing the platform. This menu varies based on the user’s administrator level – User or Site Admin – and product – standalone or CRM.

See User Menu for more information on the menu options.
**Notifications**
The mailbox icon in the global navigation bar provides in-product access to notifications.

1. A gray icon indicates no unread in-product notifications.
2. A black icon with a red number indicates the quantity of unread notifications.
3. Specify notification criteria in User Preferences in order to receive notifications on specific content.
4. See **Notification Settings** for more information on setting Notifications

**Desktop**
Navigate back to Desktop from anywhere in the platform by clicking the Desktop link.

Desktop functionality is outlined in Desktop.

**Search & Build a List**
Hovering the Search & Build a List link exposes a drop-down menu for the desired type of search to perform.

1. Click Search & Build a List or Companies to render the Companies list-building interface.
2. Each subsequent Search & Build a List option renders the appropriate functionality with available filtering criteria.
3. See Search & Build a List for an in-depth explanation of this functionality.

**Saved Searches**
Hovering the Saved Searches link exposes a drop-down menu with up to 5 of the most recently created searches and a View All option.

1. Click the desired option to display the individual search or the full set of searches.
2. See Saved Searches Page for an in-depth explanation of Saved Searches.

**Lists**
Hovering the Lists link exposes a drop-down menu with up to 5 of the most recently created lists and a View All option for viewing all of your saved lists.

1. Click the desired option to display the individual list or the full set of lists.
2. See Lists Page for more information about Lists.

**Page Help**
The Page Help icon or text to enables page-specific help tips, when available.

1. Click the Next button to advance through the tips, or click Close or “x” to dismiss the help tip.
2. Page Help is automatically enabled for first-time users of certain pages. Select “Don’t show tool tips again” to prevent the help tips from displaying on that page during the next visit.
Support
The Support Portal links users to a variety of online self-help resources.

**Live Chat** enables access 24x5 to an Avention Customer Service representative. During off hours, this feature enables users to send an email to the Customer Service team for a response during business hours.

The **Contact Support** link displays Customer Support contact information and other quick-reference information.

**Sign Up for Training** facilitates users selecting and signing up for available public group training sessions.

Search Functionality
OneSource supports searching for companies, contacts, news articles, trigger events, industry information, analyst reports, SEC filings, and more. Searching is available from the global navigation search field, Desktop, and Search & Build a List.

Companies Search

**Global Navigation Search Field**
1. With **Search for a Company** visible in the global navigation bar, enter the desired company name.
   **Notes:** Place words in quotes to find an exact term. Further refine results by using location specifiers or Booleans like AND, OR and NOT.
2. Select the desired company from the type-ahead drop-down, or press **Return/Enter**, or click on the magnifying glass to conduct the search.

**Desktop**
Use the **Build a Company List** search tile to navigate to criteria-based searching. See Search & Build a List for more details.

**Search & Build a List**
Use the **Search & Build a List** menu in the global navigation bar to navigate to the company search form. See Search & Build a List for more details.

**Search Results**
Use any of the more than 120 filters OneSource offers to further segment search results.
1. **Search Criteria**: Click the Edit link to choose from subtypes such as Company Size, Industry, Company Type, and Business Signals (unstructured data). See [Applying Filters](#) and View and Act on Results for more information.

2. **Sort by**: Change the default sort of “Number of Employees” (from greatest to least) to Relevance (best match to search term(s)), Company Name, Number of Employees (Reverse), Assets, or Revenue. Once selected, each of these sort options except Relevance offers a Reverse sort option.

   **Note**: The Relevance sort is only available for results that include keyword or conceptual search terms as one of the search criteria.

3. **Display Options**: Toggle between three results view icons -- Grid, List or Map (when available).

   a. **List view** is the default view.
b. Map view displays the companies from the current results page on a map.  
   **Note:** This view is only available for companies and contacts searches and for certain geographies.

c. Grid view provides the flexibility to choose the fields to display in a custom table format. For more information see Add a Grid View.

List View Cards
The list view card provides quick access to key information for each record.

1. **Displayed Data:** Company results display with the company name, location, sales, employees, assets, phone, and URL, where this information is available.

2. **Social Media Icons:** On the right side of the company's information are icons linked to the company's social media sites (where available). These include LinkedIn, Twitter, Facebook, and Google+.

3. **QuickView Icon:** This view opens up a snapshot of the company profile.

4. **Pin Icon:** Toggling the pin on (black) makes this company available on Desktop.

5. **Checkmark Icon:** Mark specific records and choose from a number of available actions. These actions include adding records to a new or existing list, removing records from an existing list, and other search type related options.

6. **Company Name Hyperlink:** Click the company name to enter the company profile for a deeper set of information. See Company Profile for more information.

Contacts Search

Global Navigation Search Field
1. Click the Contacts icon next to the global search field to search for contacts. Enter the desired contact name.

   **Notes:** Place words in quotes to find an exact term. Further refine results by using location specifiers or Booleans like AND, OR and NOT.
2. Select the desired contact from the type-ahead drop-down, or press Return/Enter, or click on the magnifying glass to conduct the search.

**Desktop**

Use the Find Contacts search tile to navigate to criteria-based searching. See Search & Build a List for more details.

**Search & Build a List**

Use the Search & Build a List menu in the global navigation bar to navigate to the contact search form. See Search & Build a List for more details.

**Search Results**

Use any of the more than 120 filters OneSource offers to further segment search results.

1. **Search Criteria**: Click the Edit link to choose from subtypes such as Contact Type, Contact Personal Information, or other company-specific filters. See Applying Filters and View and Act on Results for more information.

2. **Sort by**: Change the default sort of “Relevance” (best match to search term(s)) to Contact Name, Contact Level, Email Available, or Direct Phone Available.
   
   **Note**: The Relevance sort is only available for results that include keyword or conceptual search terms as one of the search criteria. In other cases, Contact Level is the default sort for results.

3. **Display Options**: Toggle between three view icons -- Grid, List or Map (when available).
   
   a. **List view** is the default view.
   
   b. **Map view** displays the contacts from the current results page on a map.
      
      **Note**: This view is only available for companies and contacts searches and for certain geographies.
   
   c. **Grid view** provides the flexibility to choose the fields to display in a custom table format. For more information see Add a Grid View.

**List View Cards**

1. **Displayed Data**: Contact results display with the contact name, title, company name, location, industry, email and telephone number for each result, where this information is available.

2. **Social Media Icons**: On the right side of the contact's information are icons linked to the contact's social media sites (where available). These include LinkedIn, Twitter, Facebook, and Google+.

3. **QuickView Icon**: This view opens up a snapshot of the contact profile.

4. **Pin Icon**: Toggling the pin on (black) makes this contact available on Desktop.

5. **Checkmark Icon**: Mark specific records and choose from a number of available actions. These actions include adding records to a new or existing list, removing records from an existing list, and other search type related options.

6. **Contact Name Hyperlink**: Click the contact name to enter the contact profile for a deeper set of information. See Contact Profile for more information.

7. **Company Name Hyperlink**: Click the company name to enter the company profile for a deeper set of information. See Company Profile for more information.
News Search

Global Navigation Search Field
1. Click the News icon next to the global search field to search for news articles. Enter the desired company, contact, industry or topic.
   Note: Place words in quotes to find an exact term.
2. Press Return/Enter or click on the magnifying glass to conduct the search.

Desktop
Use the Browse News search tile to navigate to criteria-based searching.

Search & Build a List
Use the Search & Build a List menu in the global navigation bar to navigate to the news search form. See Search & Build a List for more details.

Search Results
1. Search Criteria: Further segment results using any of the News or Industry subtype filters on the left.
2. Sort by: Change the default sort from Publication Date to “Relevance” (best match to search term(s)). When selected, Publication Date also offers a Reverse sort option.
   Note: The Relevance sort is only available for results that include keyword or conceptual search terms as one of the search criteria.

List View Cards
1. Displayed Data: News results display with the article title, publication date, number of words in the article, and an excerpt, where this information is available.
2. QuickView Icon 🌐: This view opens up a snapshot of the news article.
3. Pin Icon 🍃: Toggling the pin on (black) makes this news item available on Desktop.
4. Checkmark Icon 📔: Mark specific records and choose from a number of available actions. These actions include adding the selected record(s) to a new or existing list, merging with other news articles (if 2+ items are selected) for printing, and other instance-dependent options.
5. Title Hyperlink: Click the article title to display the full article and other Related information. The Related information varies by article, but can include: Related Companies, Related Contacts, tagged Business Topics, Related Industries, and Regions.

Research & Reports Search (where applicable, based on subscription)

Global Navigation Search Field
1. Click the Research & Reports icon next to the Global Search field and enter the desired company or topic.
   Note: Place words in quotes to find an exact term.
2. Press Return/Enter or click on the magnifying glass to conduct the search.

Desktop
Use the Analyze Markets search tile to navigate to criteria-based searching.

Search & Build a List
Use the Search & Build a List menu in the global navigation bar to navigate to the research & reports search form.
Search Results
1. **Search Criteria:** Further segment results using any of the Research & Reports or Industry subtype filters on the left.
2. **Sort by:** Change the default sort from “Relevance” (best match to search term(s)) to Publication Date. When selected, Publication Date also offers a Reverse sort option.
   **Note:** The Relevance sort is only available for results that include keyword or conceptual search terms as one of the search criteria. In other cases, Publication Date is the default sort for results.

List View Cards
1. **Displayed Data:** Research & Reports results display with the type (Analyst Report or Market Research Report), publication date, number of pages (Analyst Reports only), report title, and Brokerage House/Source, where the information is available.
2. **Pin Icon**: Toggling the pin on (black) makes this item available on Desktop.
3. **Checkmark Icon**: Mark specific records to add them to a new or existing list.
4. **Title Hyperlink**: Click the report title to display the full report in a new window.

SEC Filings Search

Global Navigation Search Field
1. Click the SEC Filings icon next to the Global Search field and enter the desired company or topic.
   **Note:** Place words in quotes to find an exact term.
2. Press **Return/Enter** or click on the magnifying glass to conduct the search.

Desktop
There is currently no desktop search tile for SEC Filings.

Search & Build a List
Use the **Search & Build a List** menu in the global navigation bar to navigate to the SEC Filings search form.

Search Results
**Search Criteria:** Further segment results using the SEC subtype filters on the left.

List View Cards
1. **Displayed Data:** SEC Filings results display with the form type, filed date, period ending, and form title, where the information is available.
2. **Title Hyperlink:** Click the filing title to display the full report in a new window.
3. **HTML, PDF, XLS, RTF (MS Word):** Hovering a filings card displays other available viewing and downloading options.

Triggers Search
A Trigger is one single event in time that creates a business opportunity or a reason to reach out to a company. Avention derives trigger events from news articles, press releases, SEC and UK Companies House filings, data changes, and more.
Global Navigation Search Field

1. Click the Trigger icon next to the Global Search field and enter the desired company, contact or topic.
   
   **Note**: Place words in quotes to find an exact term.

2. Press **Return/Enter** or click on the magnifying glass to conduct the search.

Desktop
Use the **Explore Triggers** search tile to navigate to criteria-based searching.

Search & Build a List
Use the **Search & Build a List** menu in the global navigation bar to navigate to the triggers search form.

Search Results

1. **Search Criteria**: Further segment results using any of the Triggers or Industry subtype filters on the left.

2. **Sort by**: Change the default sort from "Relevance" (best match to search term(s)) to Trigger Date. When selected, Trigger Date also offers a Reverse sort option.

   **Note**: The Relevance sort is only available for results that include keyword or conceptual search terms as one of the search criteria. In other cases, Publication Date is the default sort for results.

List View Cards

1. **Displayed Data**: Trigger results display with the trigger type, recency of the event, trigger date, title, related companies/contacts, and an excerpt, where this information is available.

2. **QuickView Icon**⃣: This view opens up a snapshot of the trigger event.

3. **Pin Icon**📍: Toggling the pin on (black) makes this trigger available on Desktop.

4. **Checkmark Icon**✔️: Mark specific records and choose from a number of available actions. These actions include adding the selected record(s) to a new or existing list, merge with other triggers (if 2+ items are selected) for printing, and other instance-dependent options.

5. **Title Hyperlink**: Clicking on the title displays the full trigger and other Related information. The Related information varies by trigger, but can include: Related Companies and Related Contacts. For some triggers, there is also a Read Source link to a more robust news article driving the trigger event. If configured by the site administrator, the full display also includes additional pertinent information called, *Why is this important to me?*

Industry Search

OneSource supports the following industry classifications:

- Avention Industry (Proprietary)
- ANZSIC 2006
- ISIC Rev 4
- NAICS 2012
- NACE Rev 2
- US SIC 1987
- UK SIC 2007

Global Navigation Search Field

1. Click the Industry icon next to the Global Search field and enter the desired industry.

   **Note**: Place words in quotes to find an exact term.

2. Press **Return/Enter** or click on the magnifying glass to conduct the search.
Desktop
Use the Research Industries search tile to navigate to criteria-based searching.

Search & Build a List
Use the Search & Build a List menu in the global navigation bar to navigate to the industries search form.

Search Results
1. **Search Criteria**: Further segment results using the Industry subtype filters on the left.
2. **Sort by**: Change the default sort from “Relevance” (best match to search term(s)) to Industry Name or Industry Code. When selected, Industry Name and Industry Code also offer a Reverse sort option.
   
   **Note**: The Relevance sort is only available for results that include keyword or conceptual search terms as one of the search criteria. In other cases, Industry Code is the default sort for results.

List View Cards
1. **Displayed Data**: Industry results display with the industry code, industry name, Avention Sector(s), Avention Industry, and Parent Industry, where this information is applicable.
2. **QuickView Icon**: This view opens up a snapshot of the industry profile.
3. **Pin Icon**: Toggling the pin on (black) makes this industry available on Desktop.
4. **Checkmark Icon**: Mark a specific item to add the selected record(s) to a new or existing list.
5. **Industry Hyperlink**: Click the industry name to enter the industry profile for a deeper set of information. See Industry Profile for more information.

Conceptual Search
Conceptual Search uses both structured and unstructured data to search for companies involved in the business, topic, or discussion of a particular concept to return the most relevant results.

Global Navigation Search Field
1. Click the Conceptual Search icon next to the Global Search field and enter the desired topic.
   
   **Note**: Place words in quotes to find an exact term.
2. Press Return/Enter or click on the magnifying glass to conduct the search

Search Results
1. Search results behave in the same way as Company Search described in Search Results.
2. To understand why a company is included in the results use the QuickView icon to review the related articles.
Search & Build a List

OneSource enables users to build queries of companies, contacts, industry reports, news articles and more, and save them as Lists, SmartLists, or Searches.

Lists Overview
Lists are static and do not change over time, unless records are manually added or removed. Saved static lists are accessible via the Lists menu in the global navigation bar.

See Lists Page for more on saved Lists.

SmartLists Overview
SmartLists are dynamic, automatically updated lists. Unlike static lists where a finite set of records is saved, a SmartList saves the criteria used to create those results. OneSource continually updates the SmartList as new records meet the defined criteria.

SmartLists are accessible via the Lists menu in the global navigation bar.

See Lists Page for more on saved SmartLists.

Saved Searches Overview
A Saved Search is a set of Build a List criteria saved for future use. Unlike a SmartList, there is no underlying set of records associated with the search.

Because no list of records is associated with a saved search, notifications are not sent for saved searches.

See Saved Searches Page for more on Saved Searches.
Applying Filters
OneSource offers more than 120 filters – based on both structured and unstructured data – along with keyword and conceptual search options. Criteria-based searches can be built using the Search & Build a List menu in the global navigation bar.

1. Select the desired search type to view the Build a List interface with the most commonly used filters exposed. Click on Additional Fields to expose other filters for the chosen category.

2. Scroll through the available filter categories on the left-hand side to continue building out the desired search criteria.
3. Use Find a Field to locate a desired filter. This search box searches for exact filter label matches based on the entered text.
4. Clear an individual filter from the search by using the “x” to the left of the criteria or Clear All to start over.
5. The Results count is updated as filters are added or removed.
6. Select View Results in the lower right-hand corner to see the records that match the selected criteria.
View and Act on Results

Refining Results
In the Results view, search criteria are available for editing by selecting **Edit** or **Add More Criteria**.

![Image of Results View](image)

Click **Find Matching Contacts** to view a list of contacts related to the current set of returned companies.

**Configuring the Results View**
By default, lists and search results display in List View. Results for company and contact data can be viewed in a more tabular layout by selecting the Grid View icon in the upper right section of the page.

Default display information for each search type is covered in Search Functionality.

**Add a Grid View**
Grid view provides the flexibility to choose the fields to display in a custom table format.

![Image of Grid View](image)

1. From a company or contact list, click on the Grid View icon and select **Add a Grid View**.
2. Click on the pencil icon 🖋 at the top of the window and enter a unique name for this view.
3. Select the desired data points for this view by clicking on a data element from the Available Fields column. Narrow the choices by selecting individual Categories or by using the Find Available Fields search field.
4. Reorder the Selected Fields by selecting a data element and dragging it up or down to the desired location.
5. Click any Selected Field to remove it from the grid and place it back in Available Fields.
6. Once the grid view is configured, select Done in the bottom right corner to apply the view to the existing list or set of results.
7. The grid will be saved in the grid view tab for future use.
8. To delete a grid view, click the x icon located next to the name of the grid view.

**Sorting Options**

As outlined in Search Functionality, **Sort by** options vary based on the search type and chosen criteria.
Available Actions for Results

Select
1. To select a group of results at once (rather than clicking the checkmark for an individual record), use Select to choose All on this Page or All Results.
2. If records are already selected, a Deselect option is available.

Add to List
1. Add to List offers the ability to add selected or all records (with a 10,000 record cap) to a new or existing list.
2. Create a new list by choosing New List from the Add to List drop-down. Provide a name for the list, select a ranking of the records to include in the list, and pin the list to the Desktop, if desired.
3. If no records are selected when clicking Add to List, OneSource assumes the user wishes to save the entire results set.

Save as a SmartList
1. The Save as a SmartList option saves both the current results set and the underlying search criteria.
2. This SmartList automatically updates as new results match the criteria.

Download
Click the Download button to download selected records, or all records up to a maximum of 5,000 (or 10,000 for Business Contacts-enabled users) to a CSV file.

Send to CRM (CRM subscribers only)
The Send to CRM functionality allows users to Send Companies, Contacts, or Triggers to the organization’s CRM instance by clicking the Send to CRM button. This option is subject to the limits and customizations set by the site administrator.

Save This Search
Save just the search criteria without saving the current results set by selecting the Save This Search link next to the search type title, above the Search Criteria box on the left-hand side.
Lists/SmartLists and Saved Searches Pages

Saved Lists and SmartLists are accessible from the Lists menu in the global navigation bar. Saved Searches are accessible from the Saved Searches menu.

Lists Page

Key Details

1. Both Lists and SmartLists can be accessed in Lists.
2. Switch the sort order among Alpha, Last Viewed, and Last Updated with the Sort by option.
3. The list card includes key details about the list, including the number of records in the list and dates for when the list was modified, created, and populated, depending on list type.
4. Hovering a list card displays options to rename, delete, or pin the list to the Desktop.
5. Clicking on the list name displays the list results.
6. The left column displays the five most recently viewed, five largest and five most recently updated lists.

Upload a New List

Create a new list from a CSV file with the Upload a New List wizard. To prepare the CSV file for upload, note the following:

1. The CSV file must contain the following columns of information: 1) Company Name, City, and Country; or 2) Avention KeyID; or 3) UK Registration Number.
2. If the Country column is blank, the matching algorithm defaults to United States.
3. Including the Address 1, Address 2, Postal/Zip Code and Phone Number fields will help find exact matches.
4. Column headers are not required in the CSV, as the wizard allows users to select the column name during the import process.
5. For performance reasons, files can contain up to 1000 records and be up to 8MB. Divide larger files into separate lists and recombine with the Add to List capability within OneSource.
Uploading the List

1. Select **Upload a New List** from the Lists dropdown or at the top left of the Lists page.
2. Drag and drop or choose the file to be uploaded.
3. Select **Upload List**.

4. Name the list or leave the default filename.
5. Map the column headers to the columns, using the sample rows of data from the file as a guide.
6. Select **Begin Import**.

Reviewing the Results

Once the file finishes processing, the number of matched companies is displayed, along with those companies that did not match to the OneSource company database. Click on the list name within the results modal to navigate to the list, select **Upload a New List**, or navigate elsewhere as desired.
Saved Searches Page

Key Details
1. Order results by Creation Date (default) or Search Name by using the Sort by option.
2. The list card includes key details about the search including the type of search, search name, created date, and search criteria.
3. Hovering a list card displays options to rename, delete, or pin the list to the Desktop.
4. Clicking on the search name displays the search form for editing.

Company, Contact and Industry Profiles
Profiles contain additional information about a company, contact, or industry and allow users to perform profile specific actions, view detailed information in the profile header, gain access to reports, and more.

Company Profile

Actions
The Actions drop-down at the top of the profile page includes Add to List(s), Provide Feedback, Create Company Alert (or Remove Company Alert), and Send to CRM (for CRM clients only).

Note: Create Company Alert sets a notification of news events for the company. Notifications are accessed via the mailbox in the upper right corner of the application and, if enabled, are sent automatically through email.

The Pin icon at the top of the page facilitates pinning this company to Desktop.

Note: Administrators have an additional Pin icon to allow pinning to all users’ Desktops.
The top section of the company profile contains the company’s basic firmographic and demographic information. When available, this section includes:

- Address (UK only: Registered and/or Trading)
- Main phone
- TPS status (UK only)
- Fax
- Company website
- Company social media links
- Employee count
- Company type
- Parent company
- Ultimate Parent company
- Corporate Family count
- Traded ticker symbol
- KeyID Number
- Legal Entity Identification (LEI) number
- Incorporation Date
- Avention Industry
- Fiscal Year End
- Reporting Currency
- Annual Sales
- Operating Profit
- Total Assets
- Liabilities
- Net worth
- Market Value
- Auditor
- Credit Rating (US/Can only)
- Fortune 1000 Rank
- Company logo
- Location in map view
- UK Registration Number
- Lists where the company is included
- Notes (personal to the user)

1. The company’s Ideal Profile Score is based on user-specified criteria and is hyperlinked to allow users to edit the Ideal Profile criteria. See Ideal Profile for more information on Ideal Profile Score and how to configure it.
2. The OneStop Report enables you to select a number of reports for this company, which are then combined into one PDF file.
3. Contacts highlights the number contacts associated with this company, and is hyperlinked to the full Contacts report for sorting and filtering.
4. Triggers calls attention to the number of trigger events detected for this company in the last twelve months, and is hyperlinked to the full Triggers report for sorting and filtering.
The list of available company reports varies based factors such as data availability, geographic region, and the subscribed OneSource product bundle. Please contact OneSource Account Management to inquire about additional reports.

Core reports, when available, include:

- Company Summary
- Contacts
- Contact Decision Matrix
- Directors (UK only)
- Shareholders (UK only)
- Corporate Family
- Corporate Overview
- Signals
- SWOT (Strengths, Weakness, Opportunity, Threats)
- News
- Triggers
- OneStop Report Files (previous download history)

Advanced reports, when available, include:

- Competitors
- Closest Industry Peers
- Closest Companies
- Strategic Initiatives
• Significant Developments
• Analysts’ Reports
• Annual Reports
• Fair Disclosure Transcripts
• SEC Filings
• Companies House Documents
• Job Listings
• Technologies in Use
• Industry Snapshot
• Industry Snapshot PDF

Available Premium reports include:

• Spending Insights
• Payment & Risk Insights
• CRUSH

Available Financial reports include:

• Financial Health
• Financial Report (Standardized)
• Financial Report (As Reported)
• Financial Report (Local Filed)
• Geographic Segments
• Business Segments
• Annual Ratios
• Ratio Comparisons
• Company Chartbook
• Valuation Tearsheet
• Stock Report
• Credit Report (US/Can only)
• Credit Snapshot (UK only)
• Mortgages and Charges (UK only)
• County Court Judgments (UK only)
• Income Statements (Standardized and As Reported versions of Annual and Interim statements)
• Balance Sheets (Standardized and As Reported versions of Annual and Interim statements)
• Cash Flows (Standardized and As Reported versions of Annual and Interim statements).

The Company Summary is the default report for every company profile, and as the name implies, contains summary information.
Sections, when available, include:

- Business Description
- Key Executives
- Significant Developments
- Financial Summary with Financial Health and Geographic Segments
- Stock Snapshot

**Report-level Actions**

Report-level actions are available in the top area of the report pane. Each report has a unique set of actions available, depending on the type of data it contains. These report-dependent actions may include:

- Save as List
- Add to Existing List
- Download as CSV
- Send to CRM (CRM installations only)
- Export as XLS (financial reports only)
- Pagination to scroll through multiple pages
- Toggle between List view, Grid view, or Map View
- Print
- Currency selection
Contact Profile

The top row of each contact profile contains the contact name at the left and contact-level actions at the right. The Actions drop-down includes Add to List(s), Provide Feedback, and Send to CRM (for CRM clients only). The Pin icon facilitates pinning this contact to Desktop.

Note: Administrators have an additional Pin icon to allow pinning to all users' Desktops.

Detail Header

The top section of the contact profile contains the contact’s firmographic and demographic details. When available, this section includes:

- Company Name
- Address (UK only: Registered and/or Trading)
- Direct phone
- Main phone
- TPS status (UK only)
- Fax
- Company website
- Lists where the company is included
  Note: Static lists also include an “x” option to remove the company from the list.
- Notes (personal to the user)
- Company QuickView link
- Title
- Function
- Email address
- Contact social media links
- Photo
- Location in map view
Sales Ribbon

1. The contact’s Ideal Profile Score is based on user-specified criteria and is hyperlinked to edit the Ideal Profile criteria. See Ideal Profile for more information on Ideal Profile Score and how to configure it.
2. The OneStop Report enables you to select a number of reports for the contact’s company, which are then combined into one PDF file.
3. Colleagues highlights the number contacts associated with this company and is hyperlinked to the full Contacts report for sorting and filtering.
4. Triggers call attention to the number of trigger events detected for this contact’s company in the last twelve months and are hyperlinked to the full Triggers report for sorting and filtering.

Reports
The Summary report is the default report for every contact profile and, as the name implies, contains summary information about the contact. When available, this report includes:

- Biography
- Employment History
- Education

If there is no Summary report for a particular individual, the Company Summary is the default report. With the exception of the Summary report, all other reports in this section mirror those on the company’s profile. See Reports for a detailed listing of available reports.
Industry Profile

Actions
The top row of each industry profile contains the industry name at the left and industry-level actions at the right. The Actions drop-down includes Add to List(s) and Provide Feedback. The Pin icon facilitates pinning this industry to Desktop.

Note: Administrators have an additional Pin icon to allow pinning to all users’ Desktops.

Detail Header
The top section of the industry profile contains the industry’s firmographic and demographic details. When applicable, this section includes:

- Source (classification system)
- Code
- Issuing body
- Total Avention Companies (hyperlinked to list)
- Parent Industry
- Ultimate Parent Industry
- Avention Sector
- Avention Industry

The Industry Summary is the default report for all industry profiles. When applicable, this report includes the following sections, some of which allow you to interact with or expand for further information:
• Industry Description
• Industry Activities
• Market Research Reports
• Top Industry Participants
• Industry News
• Geographic Segmentation

Reports
The list of available industry reports varies based on factors such as data availability, geographic region, and classification system.

Industry Related reports, when available, include:

• Industry Summary
• US Industry Snapshot (Avention Industries only)
• Latest News
• Peer Analysis
• Related Industries (Avention Industries only)
• Industry Activities

Market Research reports, when available, include:

• Analysts’ Reports
• Freedonia Focus
• RMA Industry Norms
• MarketLine Industry Profiles
• Euromonitor Industry Reports
• EMD (Emerging Markets Direct) Industry Reports

Report-level Actions
Report-level actions display in the top area of the report pane. These report-dependent actions may include:

• Save as List
• Add to Existing List
• Download as CSV
• Send to CRM (CRM installations only)
• Pagination to scroll through multiple pages
• Toggle between List view, Grid view, or Map View
• Print
User Menu

The user menu is available by clicking on the user name in the upper right section of each page, in the global navigation bar.

My Profile
My Profile contains the basic user details that are typically populated upon creation of the userid. Access to the Change Password link is found here as well as the ability to update profile details, including email address.

User Preferences
User Preferences provides access to the following user-defined settings: Import User Preferences, Locale Settings, Notification Settings, and Email Settings.

Locale Settings
Locale settings control Scale, Currency, Distance Units, Region, and Preferred Industry.

1. Scale allows you to determine the level of truncation when data is displayed and entered into numeric filters. When viewing financial data on a company profile, the default display will then be in the chosen scale.
2. When setting filter values in fields such as Revenue, Assets, and Employees the value will automatically reflect the chosen scale. For example, if the scale is set to Millions and “50” is entered in the Revenue (As Reported) field, OneSource will search on 50,000,000.
3. Currency allows you to determine the currency displayed while using OneSource. Options include:
4. Distance Units sets the default for radius-based search criteria. Options include:
   a. Miles
   b. Kilometers

5. Region selection does not currently drive behaviors in OneSource, though it may be utilized in the future. Options include:
   a. North America
   b. Europe
   c. United Kingdom
   d. Asia Pacific

6. Industry controls the default classification system for industry filters in advanced search. Available industries include:
   a. Avention
   b. ANZSIC 2006
   c. ISIC Rev 4
   d. NACE Rev 2
   e. NAICS 2012
   f. US SIC 1987
   g. UK SIC 2007

**Notification Settings**

1. Check the **Show notifications for new items in my SmartLists** box for in-product notifications when a new result is available in a SmartList.

2. Check the **Show notifications for new triggers on items in my lists** box and then the appropriate box(es) underneath to select the trigger types for in-product notifications. Expand/collapse the choices using the +/- symbols.

**Email Settings**

- **Send email for my notifications**
  - **Email format:** HTML
  - **Frequency:** Daily
  - **Time of Day:** 6:00 AM
1. Click the **Send Email for my notifications** box to receive notifications via email. The content of the Digest email is based on configured Notification Settings. Notifications will be sent to the email address set in My Profile.
2. Select HTML or Plain Text as the email format.
3. Choose the desired frequency for email delivery. Options include Daily or Weekly (on Monday).
4. Set the Time of Day for email delivery. Choose from Midnight (12:00am), 6:00am, Noon (12:00pm), or 6:00pm. Time options are based on the Eastern Time Zone.

**Ideal Profile**

OneSource’s Ideal Profile gives you the ability to define relevant weighted Business Signals on a scale of Less Important to More Important, These criteria are then used to score all companies in the Avention database to help pinpoint those companies that are most important to you.

1. **Select Edit Your Signals** to add/remove signals from consideration for the Ideal Profile score. After selections are updated, select **Done**.
2. Click and drag the blue dots to change the importance of the chosen Signals in the scoring algorithm.
3. After all desired changes are made, select **Done**.
4. Changes to the Ideal Profile settings take effect immediately and will impact the scores seen throughout the OneSource platform.

**Usage Dashboard**

The Usage Dashboard helps you understand how you compare to other users in your organization and gain visibility into how you are using the key product components of OneSource that will help you work most efficiently.
Administration Menu Items

OneSource site administrators have additional subscription-dependent menu options.

Site Settings (non-CRM sites only)

1. **New User Default Settings**: Configure site-wide defaults for new users for Notifications, Ideal Profile, User Preferences, Desktop Pins, Lists, and more.
2. **Manage Business Contacts Export Credits**: For sites with a pool of Business Contacts credits for email and direct phone exporting, this link enables admins to configure user functionality and credit caps.
3. **Copy User Lists**: Share one user’s list with one or more other users.
4. **Search Settings (US only)**: Select the **Include US and Canadian Professionals** setting to include individually listed physicians, attorneys, real estate agents and other professionals in company searches for all users.

Site Administration

1. View site-level statistics on Total Licensed Users, Total Users (active), and Total Events.
2. Select from the available timeframe options in the date menu to view Usage Events, Active Users, and Lists Saved for the selected period.
3. View detailed usage information on Site Users (default report), Usage Events, and Downloads and Exports.
4. Register Users from the link in the report dropdown menu.
5. Blue text indicates a hyperlink that allows administrators to drill in for more information.
6. An Export option is available on most reports for downloading the current report to CSV.
Site Usage Dashboard

1. View the site-level usage dashboard to gain visibility into which users are engaging in best practices and getting the most out of OneSource.

CRM Site Only Menu Items

1. **Copy User Lists**: Functions the same as described in Site Settings for non-CRM sites.
2. **CRM Admin**: Provides access to CRM configuration settings, allowing administrators to setup and customize the integration between OneSource and the CRM.
3. **Manage Business Contacts**: Functions the same as described in Site Settings for non-CRM sites.

Notifications

Notifications are accessible via the mailbox icon in the upper right corner of every page and through links in the email digest (if enabled).

There are three types of Notifications: System, SmartList, and Trigger.
1. System Notifications are a way for Avention to communicate with you about upcoming OneSource product changes.
2. SmartList Notifications alert users to new entries in their SmartLists.
3. Trigger Notifications highlight new triggers for items in your’ lists.

Clicking on the mailbox icon displays a synopsis of the five most recent notifications of each type and a link to View All.

Notifications Page

1. Read Status of All, Unread, or Read allows you to view most recent notifications or retrieve previously read notifications.
2. Type of notification filters the view to All, New SmartList Entries, New Triggers, or System Notifications.
3. Filter by List enables viewing the notifications for All or a single list.
4. The carat mark on the right of each notification expands or collapses it.
5. Mark all as Read removes the unread status from all notifications across all types.
   Note: This action cannot be undone.
6. Select one or more notifications with the checkmark to enable the Actions menu, which will allow adding notifications to a new or existing list, or merging the notifications for a print-ready view (triggers only)

OneSource Customer Support
The Avention Customer Service team is available for support 24x5 (M-F) by email or phone. In-product help is also available via the Live Chat option.

Email: support@avention.com
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Asia Pacific: +91 124 4934709