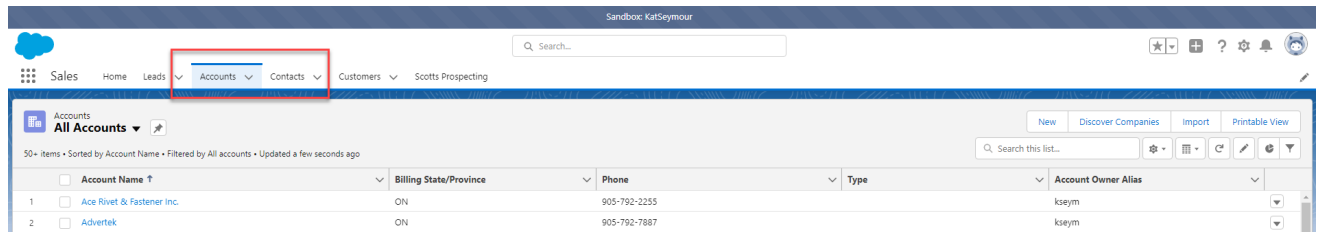


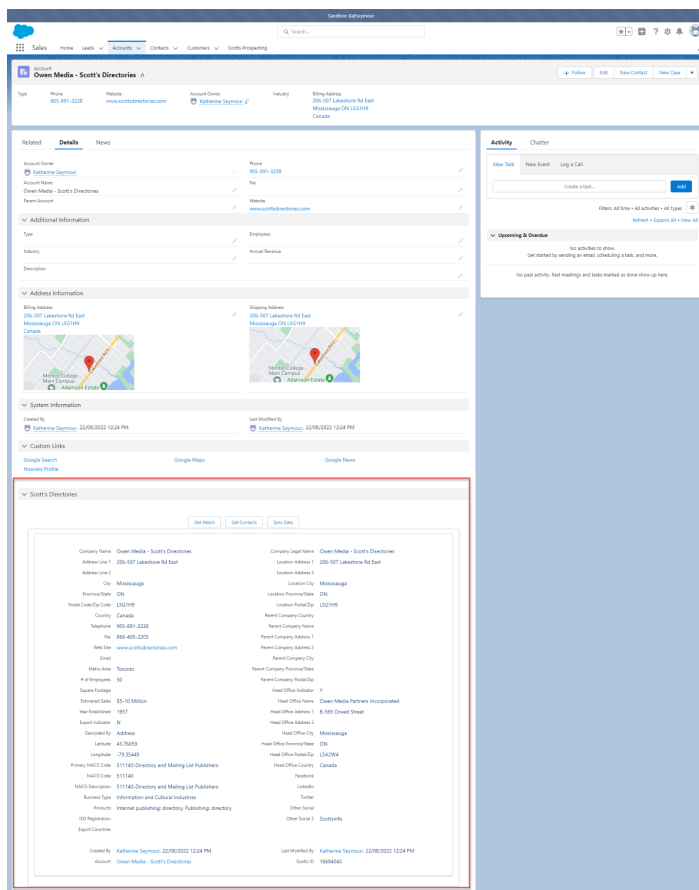
SCOTT'S FOR SALESFORCE USER GUIDE

Introduction

Once installed the app will automatically analyze your existing **Accounts** and **Contacts** information and look for matches to your pre-existing records. (The application scans your company and contact records on a night basis for matches to your Scott's Dataset. Any updates to your Scott's Dataset flow automatically into the Scott's custom object fields below the line, keeping your records complete and up-to-date.)



You can view the matched/appended Scott's Directories data below the line in your **accounts** and **contacts**.



The Scott's Prospecting tab allows you to search new contacts and accounts to add to your Salesforce instance using your Scott's Directories Dataset. You can either search for company information or contacts to add to your **Accounts** and **Contacts** tab.

Sandbox: KatSeymour

Search...

Sales Home Leads Accounts Contacts Customers **Scotts Prospecting**

Prospecting Search
Company Contact

Selected Parameters
Selection Group
Add fields will appear here
+ New Group

Saved Search: Load Search

Total Universe: 0
☒ Only Show Unmatched Results
Submit Search

Simple Search
Company Name Add Address Line 1 Add Address Line 2 Add City Select...
Province/State Select... Postal Code/Zip Code Add Country Select... Telephone Add
Fax Add Web Site Add Email Add

Advanced Parameters

▶ The check box in the **Scott's Prospecting** tab allows you to view only unmatched records to your Scott's Dataset within your Salesforce instance. If you want to view previously matched records as well simply uncheck the box. The previously matched records will have a green check mark beside the results and will be grayed out indicating that they have already been matched.

Prospecting Search
Company Contact

Selected Parameters
Selection Group

City	Brampton	⊗	+
Estimated Sales	\$1-5 Million, \$10-25 Million	⊗	+
Business Type	Manufacturer	⊗	+

+ New Group

Saved Search: Load Search

Total Universe: 251
☒ Only Show Unmatched Results
Submit Search

Sandbox: KatSeymour

Search...

Sales Home Leads Accounts Contacts Customers **Scotts Prospecting**

Company Search Results

Selected Parameters

Selection Group

City: Brampton

Estimated Sales: \$1-5 Million, \$10-25 Million

Business Type: Manufacturer

Refine Search Save Search Start New Search

Results: 1 to 50 of 251 243 unmatched

Hide Parameters

<input type="checkbox"/>	Company Name	Address Line 1	Address Line 2	City	Province/State	Postal Code/Zip Code	Country	Telephone	Fax	Web Site	Email
<input type="checkbox"/>	3D Laser & Fabrication Inc.	140 Sun Pac Blvd		Brampton	ON	L6S6E4	Canada	905-789-1973	905-670-0134	www.3dlaserfab.com	
<input type="checkbox"/>	3D Network Technology	4 Melanie Dr		Brampton	ON	L6T4L1	Canada	905-457-6486	--	http://3dnetworktechnology.com/about/about3dnetwork.html	
<input checked="" type="checkbox"/>	A Class Upholstery	8045 Dixie Rd		Brampton	ON	L6T3V1	Canada	905-670-7276	905-670-7161	http://www.aclassupholstery.ca/	
<input type="checkbox"/>	A V O Convenience	345 Queen St W		Brampton	ON	L6Y3A9	Canada	905-874-1290	--		
<input checked="" type="checkbox"/>	A-1 Railings Ltd.	7-14 Melanie Dr		Brampton	ON	L6T4L3	Canada	905-792-2498	905-792-4318	www.a-1railings.com	
<input type="checkbox"/>	A.M. Rubber & Foam Gaskets	1-2074 Steeles Ave E		Brampton	ON	L6T4Z9	Canada	905-455-1449	905-455-1295	www.amrubber.ca	
<input type="checkbox"/>	A1 Buildings Design &	120 Beaconsfield Ave		Brampton	ON	L6Y4R5	Canada	647-885-4501		www.building-design-construction.com	

Add All Records Add Selected Records

Scott's Prospecting Tab : Accounts Importing

▶ You can use the Scott's Prospecting tab to import new Accounts into your Salesforce instance. Click on the **Prospecting tab** under **Company** and enter your search criteria. You can use over 40 filters to create a customized list of prospects to be worked right within your Salesforce instance. (Ie. Toronto, Estimated Sales 5-10 Million & 25-50 Million, # Of Employees 20-100. There are 577 unmatched records to import into your Salesforce instance.)

Sandbox: KatSeymour

Search...

Sales Home Leads Accounts Contacts Customers **Scotts Prospecting**

Prospecting Search

Company Contact

Selected Parameters

Selection Group

City: Toronto

Estimated Sales: \$5-10 Million, \$25-50 Million

of Employees: 20 - 100

+ New Group

Saved Searches: Load Search

Total Universe: 577

☒ Only Show Unmatched Results

Submit Search

Simple Search

Company Name Address Line 1 Address Line 2 City

Province/State Postal Code/Zip Code Country Telephone

Fax Web Site Email

Advanced Parameters

General

Scotts ID Metro Area # of Employees Square Footage

Estimated Sales Year Established Export Indicator Head Office Indicator

▶ Click on **Submit Search** and choose to import all or selected records.

Prospecting Search

Company [Contact](#)

Selected Parameters

Selection Group

City	Toronto		
Estimated Sales	\$5-10 Million, \$25-50 Million		
# of Employees	20 - 100		

[+ New Group](#)

Saved Search: [Load Search](#)

Total Universe: 577

☒ Only Show Unmatched Results

[Submit Search](#)

Sandbox: KatSeymour

Search...

Sales Home Leads Accounts Contacts Customers **Scotts Prospecting**

Company Search Results

Selected Parameters

Selection Group

City: Toronto

Estimated Sales: \$5-10 Million, \$25-50 Million

of Employees: 20 - 100

[Refine Search](#) [Save Search](#) [Start New Search](#)

Unmatched Results: 1 to 50 of 577

[+ Hide Parameters](#)

<input type="checkbox"/>	Company Name	Address Line 1	Address Line 2	City	Province/State	Postal Code/Zip Code	Country	Telephone	Fax	Web Site	Email
<input checked="" type="checkbox"/>	A.T. Kearney Ltd.	1910-121 King St W		Toronto	ON	M5H3T9	Canada	416-977-6886	416-977-1315	www.atkearney.com	
<input checked="" type="checkbox"/>	ACCES Employment	100-489 College St		Toronto	ON	M6G1A5	Canada	416-921-1800	416-921-3055	www.accesemployment.ca	
<input type="checkbox"/>	ALL Group Financial Services	701-10 Bay St		Toronto	ON	M5J2R8	Canada	416-613-1550	416-640-4751	www.allgroup.ca	
<input type="checkbox"/>	AON Benfield Canada ULC	1000-225 King St W		Toronto	ON	M5V3M2	Canada	416-979-3300	416-979-7724	www.aonbenfield.com	
<input checked="" type="checkbox"/>	Accelerated Connections Inc.	3740-155 Wellington St W		Toronto	ON	M5V3H1	Canada	416-637-3432	416-597-0694	www.connections.ca	
<input checked="" type="checkbox"/>	Access Alliance	500-340 College St		Toronto	ON	M5T3A9	Canada	416-324-8677	416-324-9074	http://accessalliance.ca/	
<input type="checkbox"/>	Acme Environmental	274 Unwin Ave		Toronto	ON	M5A1A3	Canada	416-461-2263	416-461-1747	http://www.acmeenvironmentals.com/	
<input checked="" type="checkbox"/>	Active Green + Ross Tire	580 Evans Ave		Toronto	ON	M8W2W1	Canada	416-255-5581	416-255-4793	www.activegreenross.com	
<input checked="" type="checkbox"/>	Actra Fraternal Benefit Soc.	1000 Yonge St		Toronto	ON	M4W2K2	Canada	416-967-6600	416-967-4744	www.afbs.ca	
<input type="checkbox"/>	Adecco Employment Services	330-10 Bay St		Toronto	ON	M5J2R8	Canada	416-646-3322		www.adecco.ca	
<input type="checkbox"/>	Adelaide Spa	100 King St W		Toronto	ON	M5X1A9	Canada	416-367-9957	416-367-9653	https://www.adelaideclub.com/toronto-downtown-spa	

[Add All Records](#) [Add Selected Records](#)

[Add All Records](#) [Add Selected Records](#)

► Confirm your selection to continue.

Unmatched Results: 1 to 50 of 577

[+ Hide Parameters](#)

☐ Company Name

☒ A.T. Kearney Ltd.

☒ ACCES Employment

☐ ALL Group Financial Services

☐ AON Benfield Canada ULC

☒ Accelerated Connections Inc.

☒ Access Alliance

Telephone Fax Web Site

416-977-6886 416-977-1315 www.atkearney.com

416-921-1800 416-921-3055 www.accesemployment.ca

416-613-1550 416-640-4751 www.allgroup.ca

416-979-3300 416-979-7724 www.aonbenfield.com

416-637-3432 416-597-0694 www.connections.ca

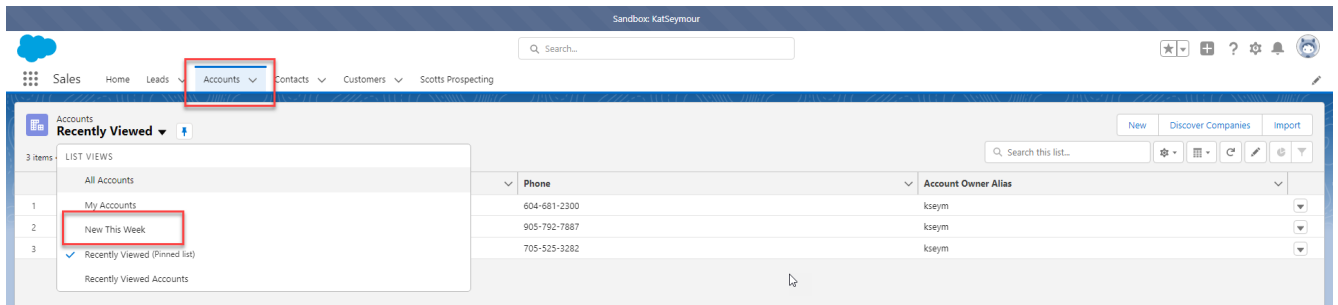
416-324-8677 416-324-9074 http://accessalliance.ca/

Confirmation

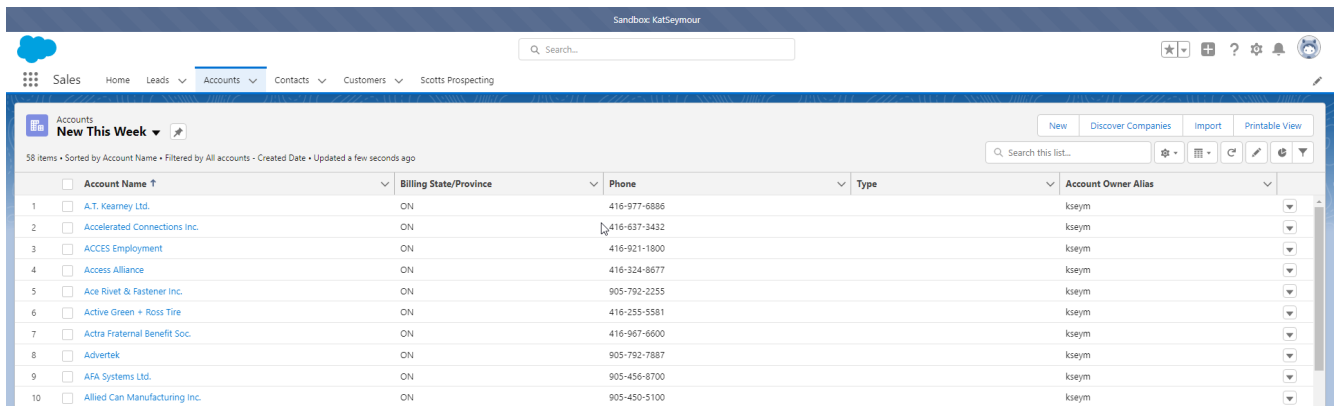
Add 6 Accounts to Salesforce

[Close](#) [Add Accounts](#)

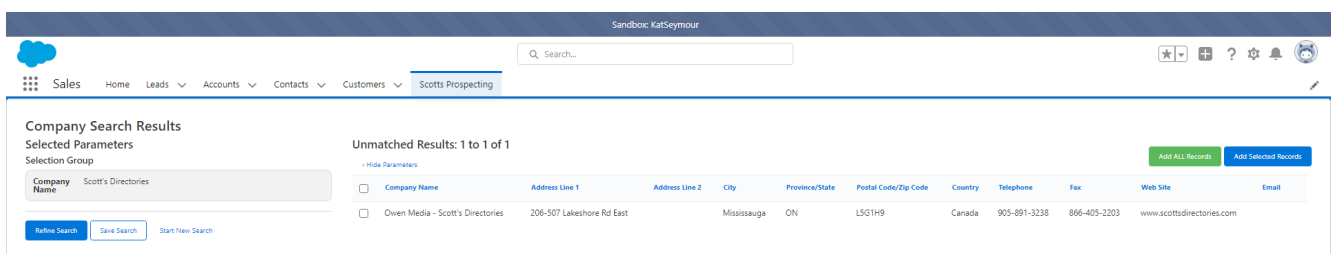
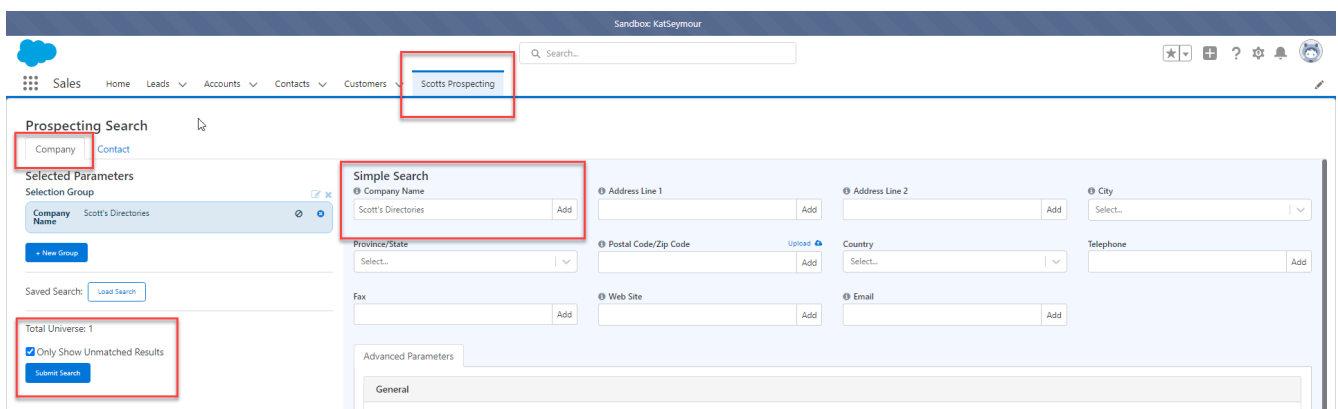
► To view your newly imported Scott's records, click on the **Accounts** tab and Accounts dropdown selecting **"New This Week"**



▶ You will be able to view all the newly imported accounts into your Salesforce instance right away.



▶ Accounts can also be imported by company name. Click on the **Scott's Prospecting** tab and under **Company** enter the company name in the **Company Name** filter. Submit the search and add your results.



Scott's Prospecting Tab : Contacts Importing

► Similar to importing Accounts you can use the **Scott's Prospecting** tab to import new **Contacts** into your Salesforce instance. Click on the **Prospecting** tab and enter your search criteria within the **Contact** tab. You can use over 40 filters to create a customized list of prospects to be worked right within your Salesforce instance. (I.e. Account Managers / Sales Managers, Toronto, # Of Employees 20 or more, Frozen Food Manufacturing NAICS.. There are 17 unmatched contacts to import into your Salesforce instance.)

Prospecting Search

Company Contact

Selected Parameters

Selection Group

Role Account Manager, Sales Manager

Company Parameters

City Toronto

of Employees 20 or more

Primary NAICS Code 311410-Frozen Food Manufacturing

+ New Group

Saved Search: Load Search

Total Universe: 17

☒ Only Show Unmatched Results

Submit Search

Simple Search

First Name Add Last Name Add Salutation Select... Title Add

Role Account Manager X Sales Manager X X Function Select... Company Name Add

Advanced Search Parameters Company Parameters

Simple Search

Company Name Add Address Line 1 Add Address Line 2 Add City Toronto X X

Province/State Select... Postal Code/Zip Code Upload Add Country Select... Telephone Add

Fax Add Web Site Add Email Add

Advanced Search

General

► Click on Submit search and choose to import all or selected records.

Contact Search Results

Selected Parameters

Selection Group

Role Account Manager, Sales Manager

Company Parameters

City Toronto

of Employees 20 or more

Primary NAICS Code 311410-Frozen Food Manufacturing

Refine Search Save Search Start New Search

Unmatched Results: 1 to 17 of 17

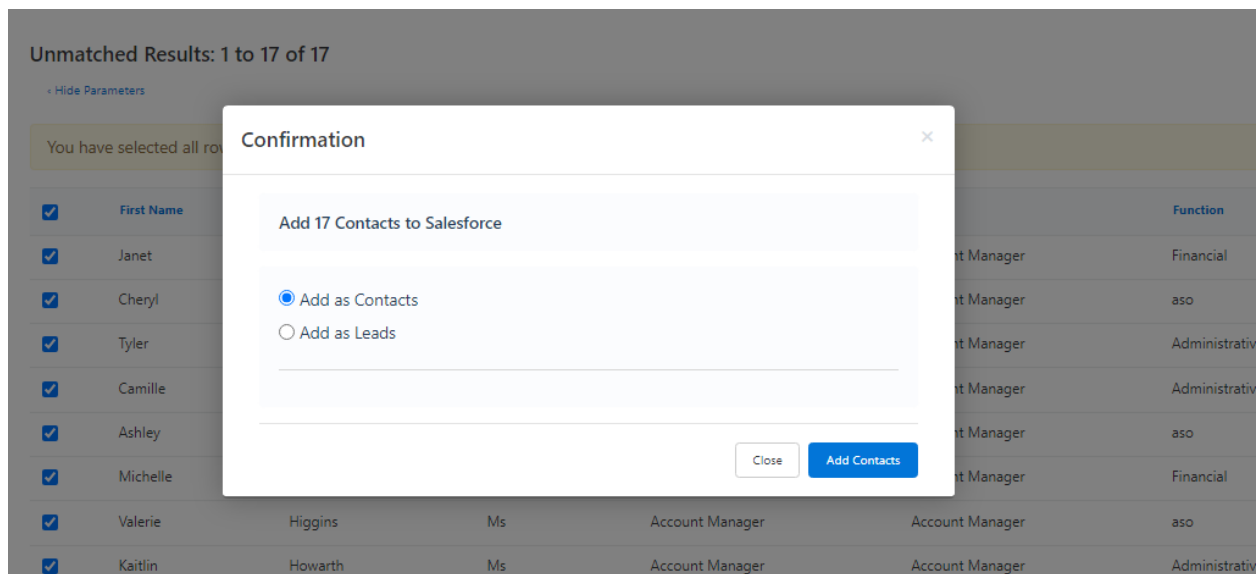
+ Hide Parameters

You have selected all rows on this page. You can also Add ALL Records.

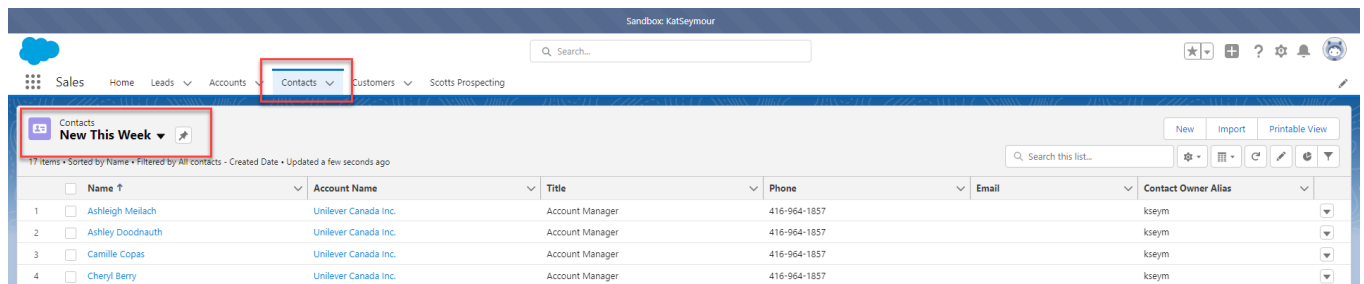
	First Name	Last Name	Salutation	Title	Role	Function	Company Name
<input checked="" type="checkbox"/>	Janet	Berney	Ms	Account Manager	Account Manager	Financial	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Cheryl	Berry	Ms	Account Manager	Account Manager	aso	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Tyler	Brown	Mr	Account Manager	Account Manager	Administrative	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Camille	Copas	Ms	Account Manager	Account Manager	Administrative	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Ashley	Doodnauth	Ms	Account Manager	Account Manager	aso	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Michelle	Faubert	Ms	Account Manager	Account Manager	Financial	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Valerie	Higgins	Ms	Account Manager	Account Manager	aso	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Kaitlin	Howarth	Ms	Account Manager	Account Manager	Administrative	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Rishi	Kapoor Rishi	Mr	Sales Manager	Sales Manager	Sales	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Dawn	Mason	Ms	Account Manager	Account Manager	Administrative	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Ashleigh	Melach	Ms	Account Manager	Account Manager	aso	Unilever Canada Inc.
<input checked="" type="checkbox"/>	Stefan	Mischenko	Mr	Account Manager	Account Manager	Administrative	Unilever Canada Inc.

Add ALL Records Add Selected Records

► Confirm your selection to continue. You can add your new contacts as either **Contacts** or **Leads**.

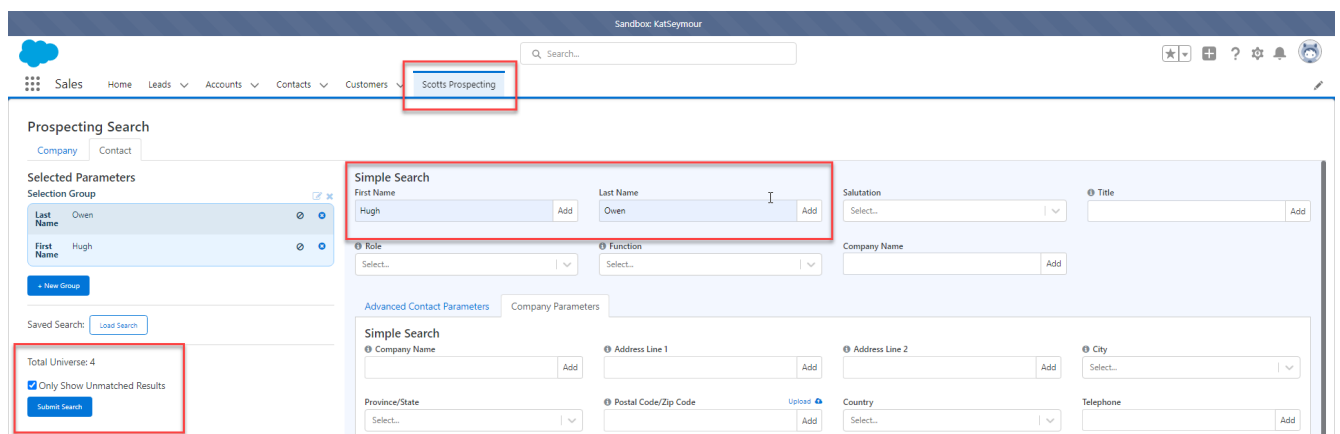


► To view your newly imported Scott's contact information, click on the **Contacts** tab and Contacts dropdown selecting "**New This Week**."



► If the contacts have been imported as a **Lead**, go to the **Leads Tab** and click on "**Today's Leads**" to view your imported contacts.

► You can also add new **Contacts** or **Leads** by name. Go to the Scott's Prospecting tab under Contacts and enter the person's name then, add the appropriate contact.



Sandbox: KatSeymour

Sales

Home

Leads

Accounts

Contacts

Customers

Scotts Prospecting

Q Search...

Contact Search Results

Selected Parameters

Selection Group

Last Name

Owen

First Name

Hugh

Refine Search

Save Search

Start New Search

Unmatched Results: 1 to 4 of 4

Hide Parameters

	First Name	Last Name	Salutation	Title	Role	Function	Company Name
<input type="checkbox"/>	Hugh	Owen	Mr	Pres/Owner	President/Owner	Executive Management	Kingsdown Owen & Co. Ltd.
<input checked="" type="checkbox"/>	Hugh	Owen	Mr	Pres	President	Executive Management	Owen Media - Scott's Directories
<input type="checkbox"/>	Hugh	Owen	Mr	Pres	President	Executive Management	Owen Media Partners Incorporated
<input type="checkbox"/>	Hugh	Owen	Mr	President	President	President	Ontario Furniture Mfg Assn

Add All Records

Add Selected Records