



Getting started with Mint UK

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This guide gets you started with Mint UK by explaining how you can search for companies you are interested in and some of the things you can do with the results of the search.

When you have logged in to Mint UK you will begin at the Home page, which includes four options on the right: 'Search companies', 'Search directors', 'Search news' and 'Search industry research'.

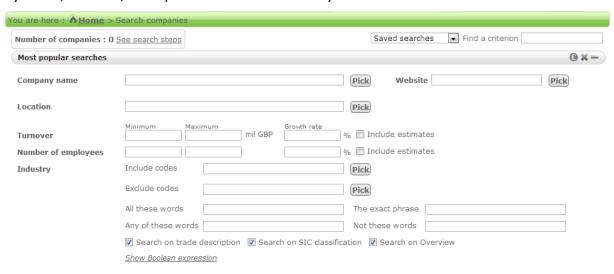
We'll consider the **Search companies** option here.



Note: If you already know the name of the company you want to search for, or its registration or DUNS number you could enter any of those in the entry field on the left to find that company.

Click the Search companies button and the Search page is displayed.

There are numerous sections in the Search page that define the companies you can search for by various categories of information, but this document describes the **Most popular searches** section, which opens automatically near the top of the page. You can use this section to search for companies by name, location, basic performance and industry sector.



Searching for companies by name

The simplest way to search for a company is if you already know its name. You can also search for several companies with similar names.

Near the top of the Search page is the **Company name** field:

Company name	Pick)

If you already know the name of the company you want to search for, enter its name in this field and click the button at the bottom right of the page. Whenever you enter any information in the Search page you can click this button to perform the search.

Alternatively, if you're not sure of the exact name, or if you want to search for several companies, click the Pick button at the end of the Company name field to display the Pick company name(s) window, which looks like this:



In the field at the top of this window, enter any sequence of characters you want to find in company names and select one or more of the checkboxes underneath.

Match on whole words only If you enter "transport" in the search field, then selecting this box will

find a company called Acme Transport but ignore A2B Transportation.

Leaving this box unchecked would find both companies.

names begin with the word(s) you enter. For example "haulage s" would find Haulage Support Ltd and Haulage Services Ltd but not J S Light Haulage. Leaving the box unchecked will find the search words

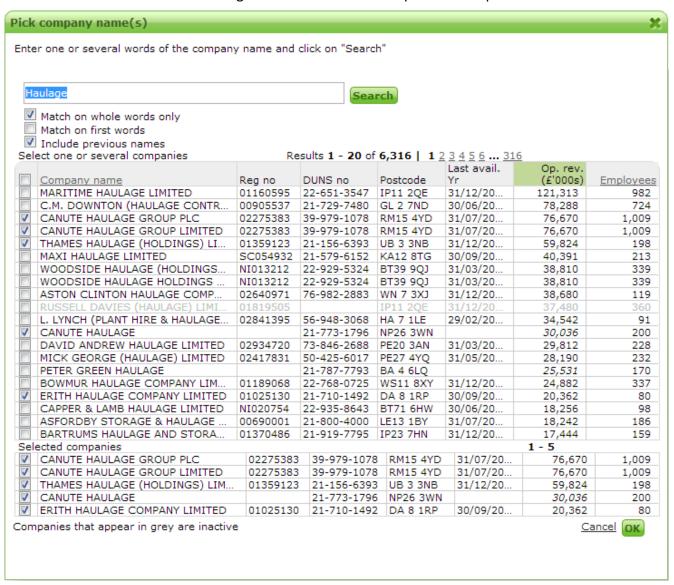
wherever they appear in the company name.

Include previous names Check this box if you want to include companies' former names in the

search.

When you click the **Search** button at the end of the field, a list of any matches is displayed below. A count of the results appears above the list and if the list runs to more than one page you can click a number to move to a later or earlier page. If any of the results are inactive companies those names will appear in grey.

Select one or more checkboxes on the left to include those companies in your company search and click the **OK** button at the bottom right of the window to complete the step.



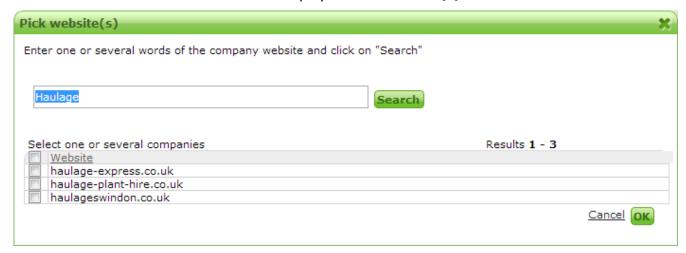
The **Pick company name(s)** window is closed and, in the main Search page, the **Company name** field shows "Picked: " followed by the first name you included. If you want to make a change, click the **Pick** button and repeat this step.

If you check or uncheck the "Match..."/"Include..." boxes in the **Pick company name(s)** window you'll need to click the **Search** button to repeat the search with the amended settings.

Searching for companies by website

If you know the required company's website address you can enter it into the Website field.

Alternatively, if you only know part of the required website, or to search for several companies, click the **Pick** button at the end of the field to display the **Pick website(s)** window.



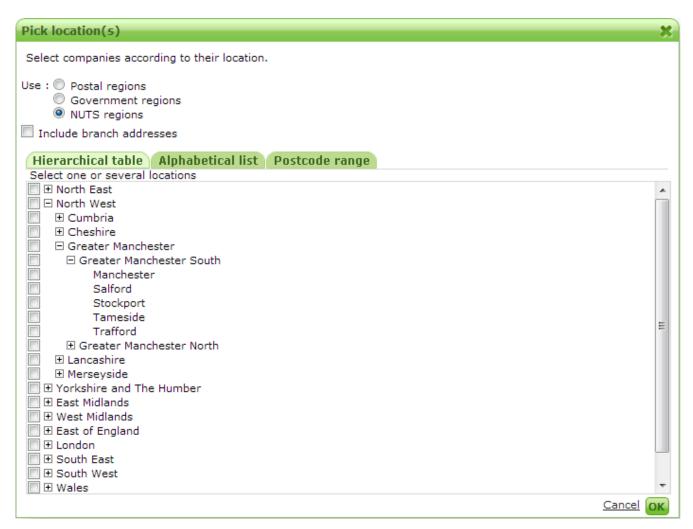
Enter any sequence of characters in the field at the top of the window and click **Search** to find any matching websites. The search will not distinguish between upper or lower case letters and will only match against the complete sequence of characters as you enter them. When the results are displayed you can select one or more checkboxes and click the **OK** button to finish the step. In the Search page, the **Website** field shows "Picked: " followed by the first website you included.

Searching for companies by location

The **Location** field allows you to include companies according to where they are situated within the UK. If you know the name of the required location, enter it in the field.

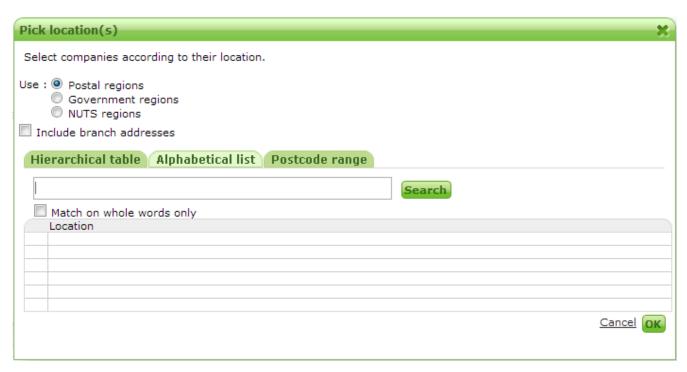
Alternatively, if you don't know the full name of the required location, or to select more than one location, click the **Pick** button to open the **Pick location(s)** window, which allows you to make your selection in various ways as explained below.

Clicking the **OK** button in the **Pick location(s)** window adds the selected locations to your search.

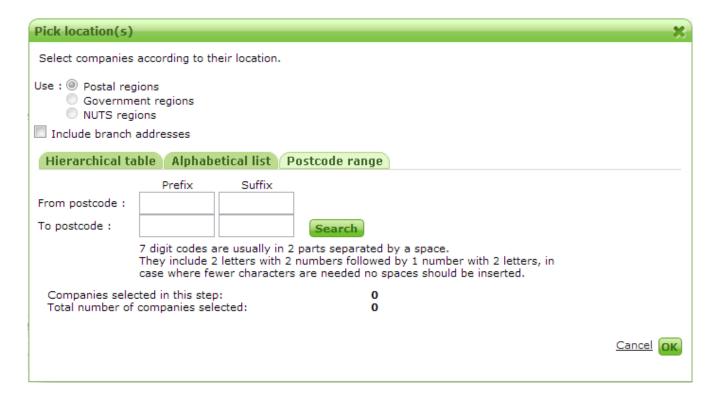


If you select the **Hierarchical table** tab, a list of locations is displayed according to the option button you select above the list – postal regions, government regions or NUTS regions (council areas). You can select one or more checkboxes to include the region(s) you want. To narrow your search further, you can click a \boxplus icon, expanding the display to show subregions, and then select one or more of those checkboxes to include the ones you want.

In any tab of this window, the search will include primary trading addresses and registered offices only, unless you select the Include branch addresses checkbox, in which case those addresses will be included too.



If you select the **Alphabetical list** tab, an entry field is displayed that lets you enter all or part of the name of the region(s) you want. By default, the search will find locations that include the search characters anywhere in their names, but if you want you can select the Match on whole words only checkbox to restrict the search accordingly. When you click the **Search** button alongside the field, a list of matching regions is displayed and you can select checkboxes to include the ones you want.



If you select the **Postcode range** tab, the option button at the top of the window is forced to be Postcode regions and a set of four entry fields is displayed.

The search is performed alphabetically to include all postcodes between the values you enter in the From and To rows. As a minimum, you should include an initial letter in each of the Prefix fields, but the more of a postcode you enter, the narrower the search will be. For example, if you enter M as the From prefix and M as the To prefix the search will include the whole of the Manchester postal region, but From = M1 To = M4 0AA will include all of districts 1, 2 and 3, and the first few addresses in district 4. When you click the **Search** button a count of companies whose postcodes match the selection range is displayed below.

Note: You should not include any spaces in the fields.

Turnover and number of employees

Turnover	Minimum	Maximum	mil GBP	Growth rate	%	Include estimates
Number of employees]		%	Include estimates

The **Turnover** fields in the Search page let you search for companies based on the range of turnover figures most recently filed at Companies House. You can enter a maximum and minimum in millions of pounds. With or without a turnover range you can search by growth rate (i.e. enter 3 for companies whose turnover has increased by at least 3% in the last financial year).

The **Number of employees** fields let you search for companies based on their number of employees and/or whether that figure has increased by a certain percentage.

Note: Companies with a turnover less than £5.6m and with a balance sheet total below £2.8m don't need to file full accounts, so figures for their turnover and employee numbers may not be available. If you select the Include estimates checkboxes you will include such companies in the search results based on estimated performance. Although companies may be found using the 'include estimates' feature no figures for the estimated values are displayed in any results.

Industry description

Industry	Include codes	Pick				
	Exclude codes	Pick				
	All these words	The exact phrase				
	Any of these words	Not these words				
	Search on trade description Search on SIC class	▼ Search on trade description ▼ Search on SIC classification ▼ Search on Overview				
	Show Boolean expression					

The **Industry** section in the Search page lets you define the business sectors in which your intended companies operate. You can use any of the fields here in the following ways:

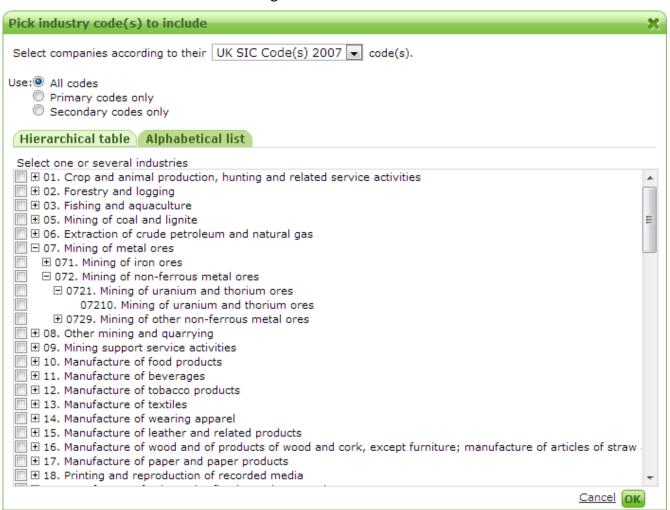
Include codes Enter or pick one or more Standard Industrial Classification (SIC) codes

that companies should be matched against. If you click the **Pick** button, the **Pick industry code(s) to include** window is displayed as shown

below.

Exclude codes Enter or pick one or more codes that companies should not be

matched against.



The drop-down list at the top of the **Pick industry code(s) to include** window lets you choose which version of the codes to select from. For the 2007 and 2003 SIC codes, option buttons are available to let you select primary codes (core business) only, secondary codes (auxiliary activity) only or both.

The **Hierarchical table** tab presents the codes as an expandable hierarchy. Select one or more checkboxes to include the required areas of business or click the \boxplus icon to expand any row to display secondary codes and select their checkboxes as required.

The **Alphabetical list** tab (shown below) presents an entry field that allows more flexible searching for companies based on text in their trade description, overview section or SIC code description. The Match on whole words only checkbox is used to control whether or not the search term "fish" should include "fishing". The Include related words checkbox includes results that are similar to the search term (e.g. "fish" would include other food and agricultural industries).

When you click **Search** a list of results is displayed. Select checkboxes in the list as required.



The remaining fields in the **Industry** section in the Search page allow more flexible searching for companies based on text in their trade description, overview section or SIC code description:

All these words	Enter one or more words in the field. Successful matches will find all of the words you enter.
The exact phrase	Enter a sequence of words and spaces. Successful matches will find the exact sequence of words you enter, not just cases where those words occur in any order with or without other words between.
Any of these words	Enter one or more words that should produce successful matches if any of them occur. You can also include an exact phrase here if you surround it with double quotation marks.

Not these words Enter one or more words. Companies will be omitted from the search

results if any of the words occur. To include an exact phrase you must

surround it with double quotation marks.

Three checkboxes appear under these fields that you can use as follows:

Search on trade description Word searches will examine the text of trade descriptions.

Search on SIC classification Code searches will be applied as required. You can check or uncheck

this box to perform alternative versions of the search quickly without needing to change the values you entered in the Include code/Exclude

code fields.

Search on Overview Word searches will examine the text of overviews.

Boolean expressions

A Boolean expression is a standard mathematician's way of combining options. It might take a little getting used to if you haven't seen it before, but it's an optional feature that can add power to your search for companies.

If you click *Show Boolean expression* you will open a pane in which the entries you've made in the **Industry** section appear in Boolean format (*Hide Boolean expression* closes the pane). Entries will be combined using AND, OR and surrounding parentheses. If you want, you can modify the contents of the pane to create different combinations.

For example, if you pick SIC code uksic2007(494) in the Include codes field, and then enter logistics haulage "freight transport" in the Any of these words field, the Boolean expression will look like this:

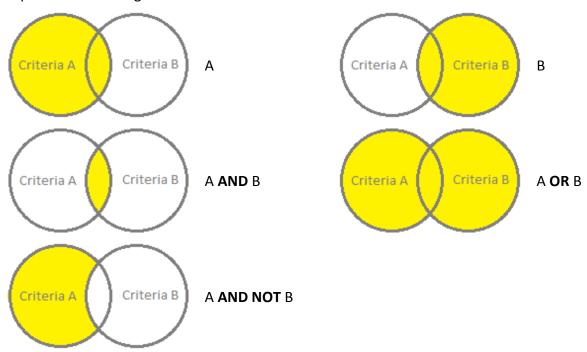


This means that your search will include companies with the chosen SIC code <u>and</u> any of the chosen words. The number of companies matching this search against the Mint UK database might be 3 in Greater Manchester South with turnover in the tens of millions.

But if you edit the Boolean expression to replace the last AND with OR, you'll search for companies that <u>either</u> have the SIC code <u>or</u> the chosen words (or both). The number of companies is now 14 because it has included extra companies with the right SIC code but no match on the words.

```
(("logistics" OR "haulage" OR "freight transport") OR uksic2007(494))
```

The available Boolean operators are AND, OR, or AND NOT, which we can understand with the help of some Venn diagrams to compare two sets of search criteria A and B. In each case the Boolean expression on the right describes the shaded area illustrated on the left:



Viewing the search results

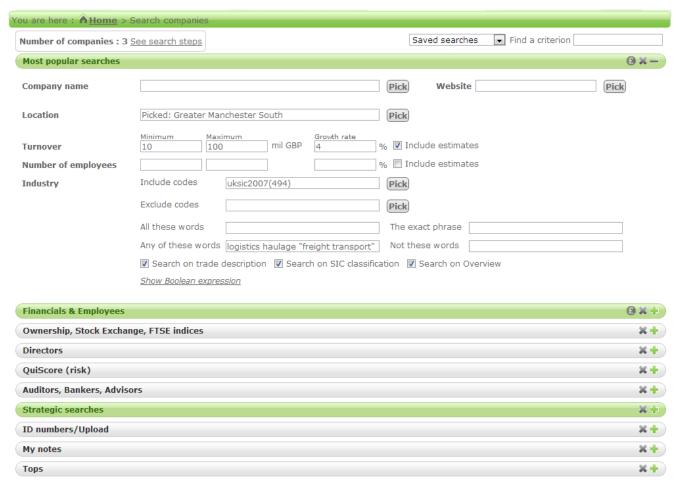
While you're entering your search criteria, the **Number of companies** figure in the upper left corner of the page predicts how many entries on the Mint UK database the current criteria would find:

Number of companies : 3 See search steps

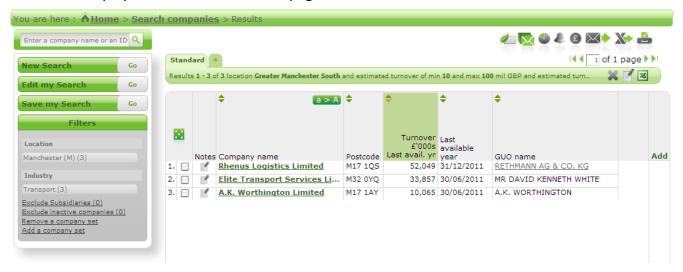
If you hover with your mouse over See search steps you'll see a summary of the criteria used to make that prediction. Clicking the link displays those criteria as a table:



You'll also notice that the search section's title changes colour when you have entered some search criteria. Some criteria in the **Most popular searches** section are repeated in other sections, so their titles may change colour too:



When you're happy with the search criteria you've entered in the Search page, you can click the **Display results** button in the bottom right corner to perform the search. The matching database entries are displayed as a list in the Results page:



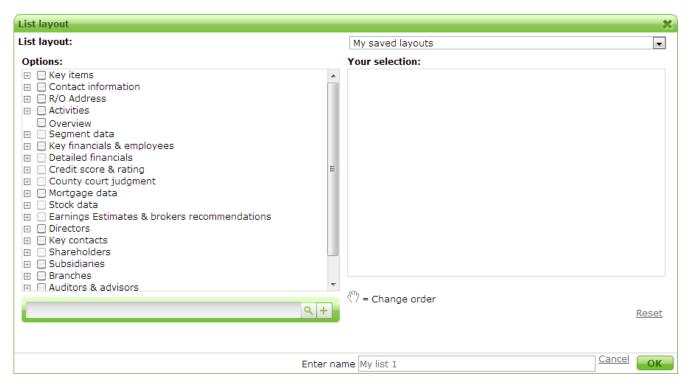
The results are displayed, by default, in the standard column layout. If the list runs to multiple pages you'll be able to use the control in the upper right corner to view later or earlier pages than the current one. You can use the button in the Company name column heading to change the letter case of those names and you can click one of the arrow buttons in the heading to sort the list. The above example shows the results sorted by descending value of turnover.

You can view a detailed report of any company in the list by clicking its name in the **Company name** column. See <u>Viewing a report for a company in the list</u> for more about this.

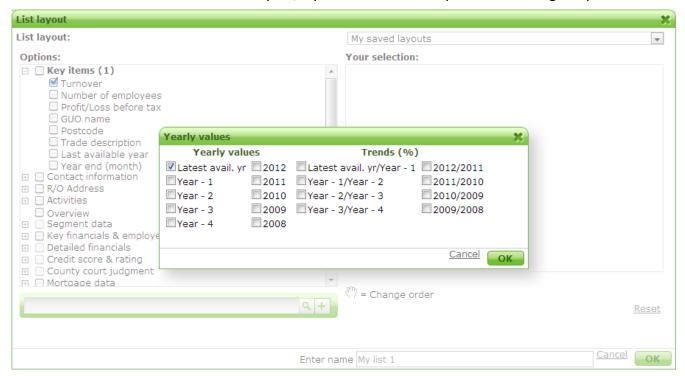
Adding a custom column layout

If the standard column layout doesn't include all the information you want to see, you can add further columns to it. For greater control you can create a new format that includes any columns you want.

To create a new column layout, click the tab at the top of the search results to display the List layout window.

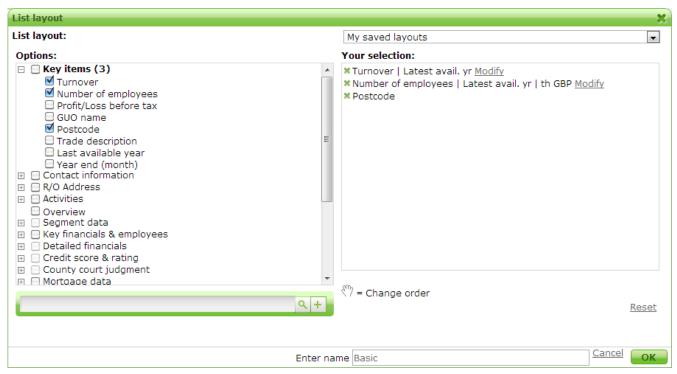


In this window you can select checkboxes on the left to choose which data options to include in the layout. Some options are expandable to reveal a deeper level of detail. As you select a data category in the **Options** list a window may be displayed to refine the type of detail you want. For example, turnover can be defined for a calendar year, a year relative to today's date or a range of years:



Click **ok** to complete the data item selection.

When you finish defining a data item it is added to the **Your selection** pane on the right. There's a Modify link alongside some lines if you want to make a change to the variable. When you've added more than one data item you can change their order by moving them with your mouse. The item at the top of the list will be the column furthest to the left in the finished layout.



You can choose a name for your layout in the field near the bottom of the window.

Click **OK** to close the **List layout** window when you're finished.

All your layouts are available as tabs at the top of the Results page:



You can modify a layout by clicking the icon in its tab, or delete a layout by clicking the icon. You can add a column to the results without affecting the saved layout by clicking the Add link on the right of the results.

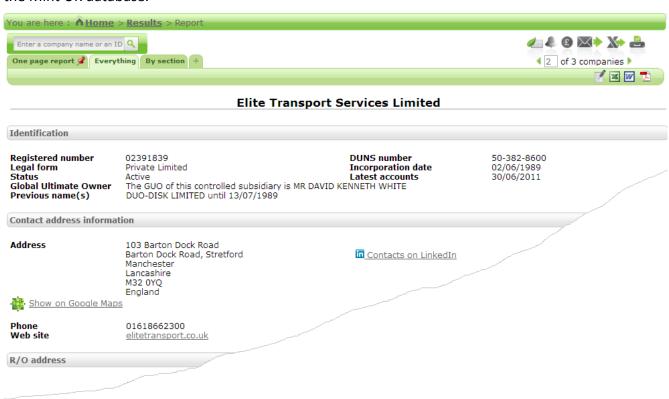
Viewing a report for a company in the list

Whenever the **Reports** page is displayed, you can click a link in the **Company name** column to view the report for that company. Information in the Mint UK report is arranged in tabs across the top of the page, and you can add custom tabs for the report just as you can for the layout.

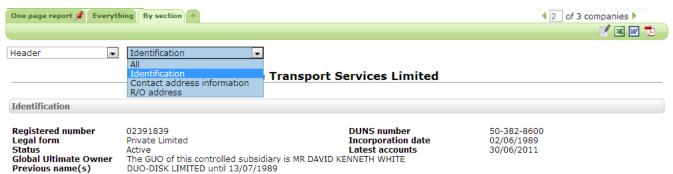
By default, the **One page report** tab is displayed, showing basic details about the company:



The **Everything** tab shows a full breakdown of all information about the company that is stored on the Mint UK database.



The **By section** tab also shows all information about the company, but it allows you to pick sections of the **Everything** tab separately from a drop-down list.



Exporting reports



In the upper right corner of the **Everything** tab you'll see a row of icons that allow you to call up your installed applications to export the full contents of the current report in PDF, Word or Excel format into a default location on your computer's hard disk (e.g. the Downloads folder). A fourth icon allows you to add a note to the current report. The same icons appear in the **By section** tab, in which case the exported detail will be the current section of the report.

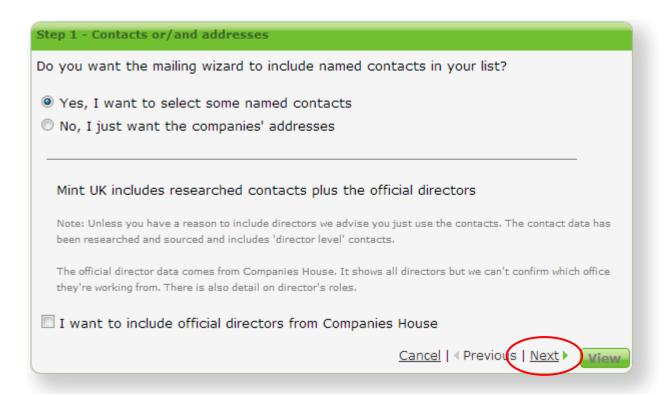
Alternatively, in the list reports, or whichever report tab is displayed, you can click the icon in the upper right of the page to display the **Export** window, which allows you to choose a range of detail to export and the required export format.

Sending mail to contacts at companies in the list

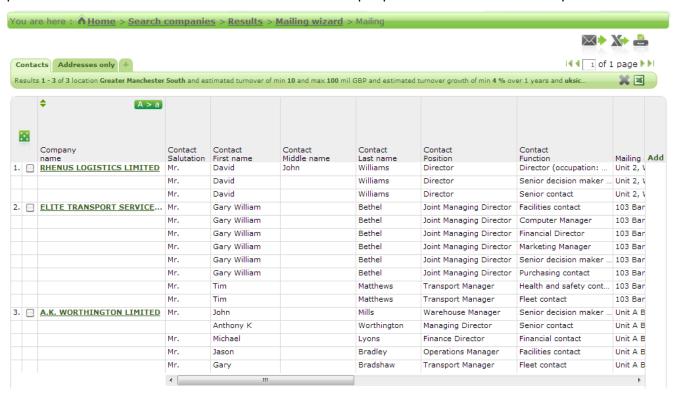
If you want to send a mail shot to people listed on the reports for any of the companies found by your search you can use Mint UK's Mail Wizard.

Note: When you open the Mail Wizard you will lose the page of search results, so before continuing you may want to make sure you have saved the search criteria so you'll be able to repeat the search later.

Begin in the **Results** page with the list of companies displayed, and then click the icon in the upper right of the page. The Mail Wizard is opened, which consists of a series of screens that you can use to identify which contacts you want to select for your mailing.



Click the Next link when you've made your selection from each screen, and at the end you are presented with a list of contact details for each of the people identified from the companies list.



You can scroll horizontally to see all the details for each listed person.

You can customize the layout of the mailing list as for the companies list (see <u>Adding a custom column layout</u> above). If email addresses are included in the mailing list you can click each one to open your email application and send an email to that person, or you can export the whole list to Excel as the source for a Mail Merge letter.

Extra contact information from LinkedIn

Mint UK includes some integration with the LinkedIn business networking website, which lets you capture further details of contacts in your companies list, provided you are a registered user of that website.

Display the detailed report for a company in the Report page and display the **Contact address information** section (on either the **Everything** tab or the **By section** tab). A link is displayed on the right like this:



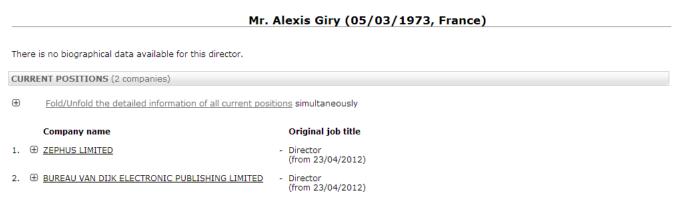
When you click the link, the screen changes to display a drop-down list of categories of people who may be listed in both the search report and the LinkedIn records:



Select the required category. If you select any category of director at the company, an appropriate list is displayed as shown below. If you select LinkedIn contacts you should click the Login to LinkedIn link to continue and login to your registered LinkedIn account.



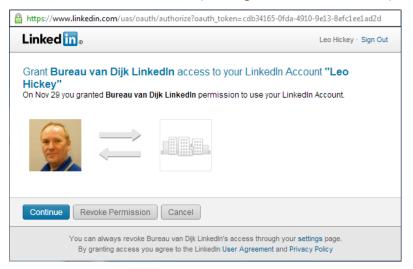
 For any person you list, click the link in the Name column and a summary of that person's biography and all current directorships is displayed:



You can click the ⊞ icon to expand information about any reference in the **Company name** column of the results:



• For any person you list, click the iii icon and you'll either be prompted to log in to your registered LinkedIn account and allow the temporary connection to be made via Bureau van Dijk (clicking the OK I'll Allow It button); or, if you have already logged in from a previous search, to confirm your LinkedIn account credentials (clicking the Continue button).



The result depends on your relationship with the person via LinkedIn:

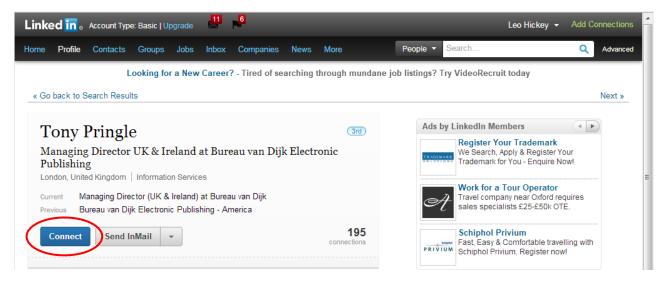
• If the person does not have a LinkedIn profile, an error message is displayed to that effect:



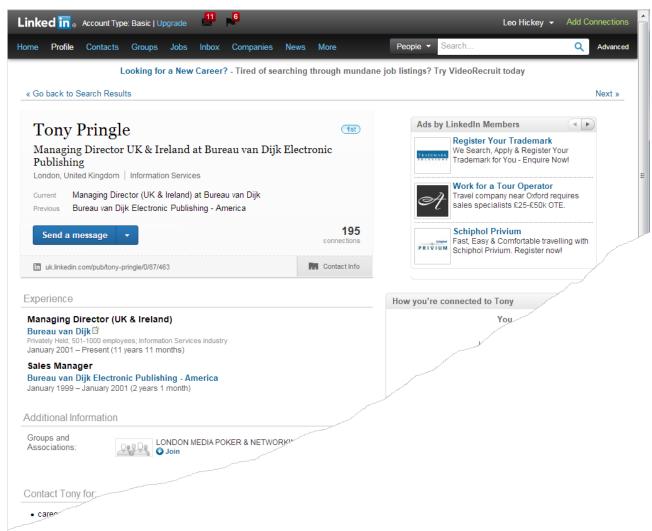
• If the person has a LinkedIn profile but you are not connected to it yet, a simple report is displayed:



If you click on the link in the **Name** column, the person's LinkedIn profile is displayed including an opportunity to request a connection.



• If the person does have a LinkedIn profile and you are already have a connection, the profile record is displayed in full:



Note: The appearance of the person's profile record may depend on the version of LinkedIn they use and on how much information they have entered there. If an error is reported that a known person's record cannot be found it may be because the person's name or company name don't match exactly between the LinkedIn records and the Mint UK database. The search is quite precise and will not find a match if any differences are found.