

## Target Lists and Reports

Datahug provides you with a single view of all the B2B relationships that exist within your organization. You can use the Lists and Reports functionality to create a list of target companies or contacts that you're looking to engage.

### Create a Target List

Click on the Lists and Reports option and hit Create new List.

The screenshot shows the Datahug navigation bar with 'Lists and Reports' circled in orange. Below the navigation bar, the 'Lists and Reports' section is visible, featuring a search bar and a table of existing lists. To the right, a 'List Summary' panel for 'EMEA Salesforce Users Companies' is shown, with an orange arrow pointing to the 'Create new list' button.

List Name	Last Updated	Items
EMEA Salesforce Users Companies	1st Apr 2014	800
Dreamforce 2012 Contacts	5th Jun 2013	520
Fortune 500 Companies	26th Apr 2014	500
FTSE 500 Companies	1st Apr 2014	489
Target I list - CH Companies	24th Sep 2013	426

Enter a name for the List and select whether it is a list of target companies or contacts. You can then either type in the names of each of the targets individually or copy and paste a list from a spreadsheet.

The 'Create list' form is shown with the following steps:

- Step 1: Create the list** - A text input field containing 'Venture Capital Firms'.
- Step 2: Choose your list input type** - A question: 'Do you want to maintain a list of important contacts or companies?' with radio buttons for 'Companies' (selected) and 'Contacts'.
- Step 3: Add your companies** - A section with two options:
  - Search for companies in Datahug**: A search box containing 'Draper Fisher Juvetson (dfj.com)' and 'Index Ventures (indexventures.com)'.
  - OR**
  - Copy or type a list from another source**: A text area containing 'dfj.com' and 'indexventures.com'.

A 'Create list' button is located at the bottom of the form.

**\*Hint\*** Type the company or contact name in slowly and select it from the dropdown list generated from the companies in your network.

**\*Hint\*** Paste in the email domain / address of the company or contact to guarantee 100% accuracy.

Once you hit Create List you can view the results and see if you have any existing relationships.

The screenshot shows the DataHug interface with a list titled "Financial Services Software Companies". The list has the following columns: Company Name, Connected via, Best Connected, Last Interacted, and HugRank. The entries are:

Company Name	Connected via	Best Connected	Last Interacted	HugRank
<a href="#">Sungard</a> sungard.com	10 colleagues	Don White	Don White 2 days ago	[Progress bar] x
<a href="#">Msys</a> msys.com	7 colleagues	Neil Hoey	Neil Hoey 2 days ago	[Progress bar] x
<a href="#">Murex</a> murex.com	6 colleagues	Conor Hickey	Conor Hickey 7 days ago	[Progress bar] x
<a href="#">Msci</a> msci.com	4 colleagues	Don White	Don White 2 days ago	[Progress bar] x
<a href="#">Fidessa</a> fidessa.com	4 colleagues	Don White	Don White 8 days ago	[Progress bar] x
<a href="#">Advent</a> advent.com	1 colleague	Rob Joyce	Rob Joyce 174 days ago	[Progress bar] x

On the right, there is a "Filter list" section with a "Relationship Health" pie chart. The legend for the pie chart is:

- Active (Green)
- Fading (Orange)
- Cold (Red)
- Inactive (Grey)
- Not in Network (Black)

The following information is shown in the list

Company Name	Name of the target company / contact
Connected Via	The number of colleagues who have a connection to that company / contact
Best Connected	The colleague with the strongest connection to the company / contact
Last Interacted	The date of the last interaction with the company / contact
HugRank	The HugRank between your company and the target company / contact

You can order the list by each of the columns to find the warmest target for example.

### Drill down to Company or Contact

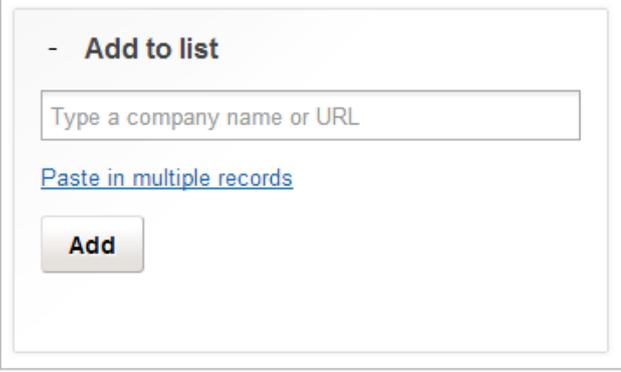
Clicking on the company / contact name will bring you to their Datahug profile page.

<a href="#">Msci</a> msci.com	4 colleagues	Don
<a href="#">Murex</a> murex.com	6 colleagues	Cono
<a href="#">Niceactimize</a>	1 colleague	Tom

## Edit the List

You can remove an item from the list by clicking on the X icon next to it. You can add another company / contact to the list by clicking on Add to List.

You can add companies or contacts individually or in bulk by pasting them in.



The screenshot shows a form titled "Add to list". It contains a text input field with the placeholder text "Type a company name or URL". Below the input field is a blue hyperlink labeled "Paste in multiple records". At the bottom of the form is a grey button with the text "Add".

## Export the List

You can export this list to a spreadsheet to further analyze and embellish the data if you wish by hitting "Export this list".

## Advanced Reports

There are a number of advanced reports available to the end-user if more in-depth data is required. Please contact your Customer Success Manager to find out more about these.