Welcome to Reference USA. This user guide will show you everything you need to know to access and utilize the wealth of information available from Reference USA.

This is an Internet-based database that may be accessed by using one of the network computers in the Business Library in Alan B. Miller Hall.

Mason School of Business graduate students, undergraduate students with a business major, faculty and staff also may access this program through the Mason School of Business network.

Other College of William & Mary students, faculty and staff may access Reference USA by going to the Earl Gregg Swem Library home page at http://www.swem.wm.edu

Select Research on the Home page header, then Library Databases in the menu column on the left. On the Library Databases page select Business & Economics in the Categories box on the right and click on the Apply Filters button. Reference USA will be on the list displayed.

Reference USA is an Internet-based reference service from the Library Division of infoUSA. The site was designed for use as a reference tool in libraries. The Reference USA database contains detailed information on more than 14 million U.S. businesses, 1.5 million Canadian businesses, and 3 million international businesses (through the OneSource database).

Business information is compiled from the following public sources: more than 5,600 Yellow Page and Business White Page telephone directories; annual reports, 10-Ks and other SEC information; federal, state and municipal government data; Chamber of Commerce information; leading business magazines, trade publications, newsletters, major newspapers, industry and specialty directories; and postal service information, including both U.S. and Canadian National Change of Address (NCOA) updates.
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The Opening Screen/Home Page

The Opening Screen of Reference USA provides links to a variety of resources. The main links, in the ReferenceUSA Available Databases box, are to the **U.S. Businesses**, **Canadian Businesses**, and **OneSource** databases. In addition to these there are links to information about Reference USA and how to contact Reference USA.

To access the U.S. Businesses database click on the **U.S. Businesses** link in the ReferenceUSA Available Databases box. The same is true for the Canadian Businesses database and the OneSource Global Business Browser database. For these you would click on the **Canadian Businesses** link or the **OneSource** link. Other databases may be available from time to time as they are offered for short trial periods.

For information on how to use the OneSource Global Business Browser database please refer to the OneSource Global Business Browser user guide in a separate binder.
The U.S. Businesses and Canadian Businesses links will open the Quick Search page for the respective database. Please go to page 5 (or page 18 for the Canadian Businesses database) for information about the Quick Search page.

The OneSource link will open the OneSource Global Business Browser database. Please go to the OneSource Global Business Browser user guide in a separate binder for more information about this database.

As each of the databases listed in the ReferenceUSA Available Databases box is hovered over, two more links appear. These are More Information and Search. The More Information link will open an information page about that database on the right side of the screen. The Search link will open the same search page as the database name link.

The header bar has nine links. The links are Home, About Us, Data Quality, Take a Tour, Customers, Contact Us, FAQs, Resource Center and Library Locator. Please go to page 23 for information about these links.
U.S. Businesses Database

Clicking on the **U.S. Businesses Database** selection on the **Home** page will open the **U.S. Businesses Database** search page. This page has two tabs, **Quick Search** and **Custom Search**. The **Quick Search** tab is usually the default opening display. See page 6 for information about the **Custom Search** tab.

**Quick Search Tab**

The **Quick Search** tab has six boxes. You may fill out one or more of these boxes to conduct a search. The boxes are **Company Name**, **Executive First Name**, **Executive Last Name**, **City**, **State** and **Phone**.

The **State** box has a drop-down menu that contains a list of all states as well as an “All” selection.

Filling in more than one box will narrow the search and allow ReferenceUSA to provide a more concise listing of businesses that meet your criteria.

Once you have filled in the search criteria you may start the search by clicking on the **View Results** button at the bottom of the search form. This will open the **Results** page, which consists of a list of businesses arranged alphabetically by company name within each state. For information about the **Results** page, please go to page 9.
Custom Search Tab

If you want to have more choices in your search criteria, you may choose to use Custom Search. Custom Search allows you to pick the criteria you want to include in your search. To access Custom Search, click on the Custom Search tab at the top of the U.S. Businesses Database page.

The U.S. Businesses Custom Search tab has more than 35 criteria in nine categories. The categories are: Company Name, Executives, Business Type, Geography, Phone, Business Size, Ownership, Financial Data, and Special Selects. Each category has at least two or as many as nine criteria.

The default display is for the various categories to be collapsed. You may expand each category by clicking on the plus icon next to each category name or you may expand all categories by clicking on the Expand All button near the top of the list. Once the list is expanded this becomes a Collapse All button.

You select the criteria you want to use in your search by clicking on the check box next to each item. As you select an item a box with search term boxes appears in the middle section of the page. You use these boxes to enter the search terms you want to use in your search.
Most of the boxes that are displayed allow you to enter your own search terms. Some have drop down or scrolling menus that allow you to pick predetermined criteria (i.e., Executive Title, State, Number of Employees, etc.).

Other category selections allow you to pick from a limited number (i.e., two or four) of selections by clicking on a check box.

A few selections allow you to conduct a search for criteria or select a range. Examples of this type of selection are zip code, SIC/NAICS codes, and area codes. The zip code selection gives you up to ten criteria boxes. That is, you may enter up to ten zip codes for your search. This gives you a much broader search capability than having to enter zip codes one at a time and making a separate search for each one.

A special feature of the zip code section is that you have two other options. You may paste a list of zip codes into the box that is opened when the Paste ZIP Codes link is selected.

You also have the option of entering just the first three numerals of a zip code in the section that is opened when the 3-digit ZIP Code Lookup selection is opened. The zip codes included in the broad category you entered into the box are displayed in the Available ZIP Codes box. As you click on a specific ZIP Code it is moved over to the Selected ZIP Codes box.
The right side of the **Custom Search** tab has a box with several buttons and counts. This box allows you to see how many companies meet your search criteria. As you make selections and enter terms into the various boxes you may update the count to see how many companies (or e-mail addresses) are still available for your search.

For example, at the time of this writing there were 23,862,071 companies included in the U.S. Businesses database. This number changes periodically as the database is updated with new data.

The company record count is updated by clicking on the **Update Count** button.

After entering a search term (e.g., Kellogg in the **Company Name** box) you may want to update the count to see how many companies are left. In this case, with Kellogg being the only criteria entered, the record count shows only 996 companies are still in the search pool (or 91 e-mail addresses). As more criteria are entered or selected you may update the count again to see how many companies are left. This is a handy tool to help manage the number of companies in your results page.

If the count shows too many companies you can enter more criteria. If the count is too low (or zero) you can remove one or more criteria.

The e-mail count is useful if you are looking for companies with e-mail addresses included in their listing.

Once you have made your criteria selections you may start your search by clicking on the **View Results** button. This will open a **Results** page, see page 9 for information about the **Results** page.
**Results Page**

The *Results* page is a tabular display of the results of your search, whether it was a Quick Search or a Custom Search.

The *Results* page lists businesses alphabetically according to Company Name, within each state. Each company name is a link to that company’s *Detailed Listing* page (see page 12).

This page also has columns for Executive Name, Street Address, City/State, Zip, Phone, and Verified.

Clicking on the down arrow in the Verified column header will display a menu with five selections: Verified, Corp. Tree, Title, Employees, and Sales. The Verified icon indicates that the record has been through the Reference USA’s most stringent verification process for accuracy.

Clicking on the Corp. Tree selection will display a “tree” icon in the records that has a higher or lower level of business organization. For example, if a business is indicated in the table with an up-link arrow, then that business has a higher level (i.e., headquarters) above it. Clicking on the up arrow link will open a *Results* page with the higher level business. The reverse is true if there is a down-link arrow. That would mean the business you located has one or more other locations subordinate to it.

Clicking on the “tree” icon will open a *Results* page with the parent, any subsidiaries, and branches listed. The name of each company on the list is a link to that particular company’s *Detailed Listing* page.

Each company on the list is identified with a code: PC (Public Company), PV (Private Company), SU (Subsidiary of US Parent), SF (Subsidiary of Foreign Parent), and B (Branch).

Other features of this page operate in a similar manner as the main *Results* page.
The **Title** selection column will display the title of the person named in the Executive Name column.

The **Employees** selection column will give the employee range for the company (i.e., 1-4, 50-99, etc.).

The **Sales** selection column will give a value range for the sales for each company.

The first column has a checkbox in the header that will put check marks in all the check boxes for each company (or remove any check marks). A check mark indicates the company in that row has been selected. You must select one or more companies to perform Print or Download operations.

The Companies on the *Results* page are displayed in a table in pages of 25 rows. There is a page number box field (at the top and bottom of the page) that allows you to navigate from page to page. Clicking on the arrow buttons move you forward or back one page at a time. You also may enter a number into the box to jump to the desired page.

The *Results* pages have buttons at the top and bottom of the page. These buttons are: **Review**, **Details**, **Map**, **Summary**, **Download**, and **Print**.

There are also two links, **New Search** and **Revise Search**.

- **Review** (Custom Search only) opens a page with the search criteria you used in the current search. You may select one or more criteria to remove from the search and rerun the search.

- **Details** (at least one company must be selected) gives you the option of viewing the details of your search results. You will be presented with the list of companies in the same detail that you would have gotten by selecting each one individually.

- **Map** will open a page with a map of all companies on the *Results* page. The map page has a **Zoom To** data field that allows you to zoom in to a specific area. There are also controls that allow you to manually move the map and enlarge a selected area.

  The column on the left has selections for specific areas (states in this case). Clicking on one of these will open that area on the map with the individual companies located on it.

  These companies are listed in the column on the left. Clicking on a company name will highlight that company on the map and display a bubble with location information.
• **Summary** opens a page where you may select the criteria for a breakdown by count of the all companies in the search results. When you have selected your criteria (only one item at a time may be selected in the Geography break down section) click on the **View Results** button. This will display a table, with the summary results, below the item selections.

• **Download** gives you the option of saving your search to removable media. The program limits you to saving no more than two pages (50 companies per search) at a time. To save a list you must select the companies to be saved. You do this by clicking on the check boxes beside the company.

   Once you click on the **Download** button you are given options for selecting the file format and the level of detail. Click the radio buttons you want and then click on the **Download records** button.

   This opens the **File Download** window. Click on the **Save** button to continue your download.

   Next, the **Save As** window is opened. Enter a file name in the **File Name** data field. Click on **Save** when you are ready to download your list.

• **Print** gives you the option of printing out selected results of your search. The program limits you to printing no more than 50 companies per search. To print a list you must select the companies to be printed. You do this by clicking on the check boxes beside the companies.

   Once you click on the **Print** button you are given the option of printing a summary, details or a custom report. (Summary is the list as displayed on the **Results** page, Details is a list of companies as they would be displayed on each **Detailed Listing** Page, Custom is a report in which you select the fields.) Click the radio button you want and then click on the **Preview** button.

   This will open a page showing what the print job will look like. Click on the **Print** icon on this page to print it.

• **Revise Search** takes you back to your original search page with your original search criteria still entered. You may then select different criteria for your search.

• **New Search** returns you to your original search page where you may select all new criteria for a completely different search.
Detailed Listing Page

Each name in the Results page Business Name column is a hyperlink to that business’ Detailed Listing page. This page lists a variety of information about the company you selected.

The page is laid out in one long scrolling column with the information divided into 14 categories. These are: Location Info, Job Listings, Industry Profile, Business Profile, Location Map, Business Demographics, Management Directory, Company News, Stock Data, Business Expenditures, Historical Data, UCC Filings, Nearby Businesses, and Competitors Report.

When the page is first opened only the first three categories are displayed. Each category may be expanded or collapsed by clicking on the Expand or Collapse link in the header for each category.

The top of the page has some links, buttons, and boxes to help you use the data available.

After you have opened more than one company page a new box will appear. Each page is remembered and you may navigate through the pages by clicking on the left and right arrows. You may go to a specific page by entering a number into the box.

The three buttons on the right side of the page are Data Feedback, Download, and Print. The Data Feedback button opens a page that allows you to notify InfoUSA of any corrections that need to be made to the company record. The information you provide will be checked by InfoUSA before it is included into the company record.

The Download and Print buttons open the same pages and perform similarly as the Download and Print buttons on the Results pages. Please go to page 11 for information about these two buttons.
The **New Search** link will return you to the original search screen (Quick Search or Custom Search) so that you may enter search terms for an all-new search.

The **Back** link will return you to the results page where you may select a different company to research.

**Quick Links Menu Box**

On the left side of the Detailed Listings page is the Quick Links menu box. The box has links to each of the 14 categories listed in the main section of the page. As a category is selected the page scrolls to that category, which is automatically expanded.

The **Expand All** button near the top of the box allows you to expand all the categories so that you may scroll down the page and view the contents of each category.

The **Minimize All** button will close all the categories so that only the heading for each category is displayed.

For those companies with a corporate family the Corporate Tree box will be displayed below the Quick Links menu box. The Corporate Tree box will have two links. The “tree” link will open a *Results* page with the parent, any subsidiaries and branches listed. This is the same page opened when the Corporate Tree link in the *Results* page is selected. See page 9 for information on the Corporate Tree selection.

The up or down arrow link will open a *Results* page listing the subsidiaries and branches of the company being researched. This page operates in a similar manner as the main *Results* page. See page 9 for information about the *Results* page.
Detailed Listing Page Information

Location Information
The Location Information category lists general contact information, including the company’s web site address, if it has one.

This section also has a radius search feature. This is used to locate other companies in the same area as the company you are researching.

Enter a number into the box and click on the Find Similar, Find All or Advanced Radius Search link. A number must be entered or you will receive a prompt to enter one.

The Find Similar link will find all similar companies in the area you specified. This includes the company being researched. The results will be listed on a Results page.

The Find All link will find all companies in the area you specified. The results will be listed on a Results page. See page 9 for information about the Results page.

The Advanced Radius Search will open the Custom Search tab of the U.S. Businesses search page. The criteria listing will be opened to the Radius selection. You may adjust the criteria already entered or add more criteria as needed. See page 6 for information about the Custom Search tab.

Job Listings
The Job Listings category gives you a list of positions open in the company being researched.

Industry Profile
The Industry Profile category displays a table of SIC and NAICS codes in which the company does business. The table includes a listing of franchises, if the company has any.

Business Profile
The Business Profile category gives you a brief description of the company.

Location Map
The Location Map category includes a map showing the company’s location. Once the map is opened you may adjust the area displayed or print out the map.
Business Demographics

The Business Demographics category lists some general information about the company. The Corporate Sales Volume and Credit Rating Score headings are links that will open a small window with information on how the data is compiled for that selection.

Management Directory

The Management Directory category lists the main executives associated with the company being researched. The list is divided into four columns: Name, Executive Title, Gender, and Executive Ethnicity.

The Name heading has a Show All Biographies link that will open the biographies for those persons who have one available. Clicking on the link again will close the biographies.

The executives who have biographies available have a Show Biography link next to the name. This link performs the task of opening and closing the biography.

The availability of biographies depends on information received from the companies.

Company News

The Company News category displays a table of articles. The list is divided into three columns: Title, Source and Published On (which gives you the date and time the article was published).

Each title box has a link (Show Preview) that will display a short preview of the article. The Title column header has a link (Show All Previews) that will open all previews on the list.

Once a preview is displayed there will be a Read More link included that will open the entire article.

Stock Data

The Stock Data category gives you the ticker symbol and stock exchange for the company if it is publically traded.
The Stock Exchange line includes two links: **Stock Info** and **Google Finance**. The **Stock Info** link will open a results page, in a new window, from a Google search using the stock exchange and ticker symbol as search terms.

The **Google Finance** link will open The Google Finance page for the company being researched. The page will be displayed in a new window.

**Business Expenditures**

The Business Expenditures category displays a list of 14 items and the amount the company spends for each item. If there is no data available for an item the list will indicate that there is no data available.

**Historical Data**

Clicking on the **Historical Data** category in the Quick Links menu box will display information on sales volume and number of employees.

Two graphs will display three years of information for these two areas.

There is also a line of links to open three years of annual reports. These are pdf files (opened in a new window) of the “glossy” reports provided by the company for its shareholders, not the reports filed with the SEC.

**UCC Filings**

The UCC Filings category opens a listing of any UCC (Uniform Commercial Code) records. These records list property pledged as collateral. The list has four columns: Filing Date, Expiration, Source Filing ID, and State.
Nearby Businesses

Clicking on Nearby Businesses will open a list that includes businesses located near the company being researched. The list is in four columns: Name, Location, Phone, and Primary Business.

The company names in the Name column are links that will open a Detailed Listing page for the selected company.

Competitors Report

The Competitors Report category displays a list of competitors of the company being researched. The list is in three columns: Name, Location, and Phone.

The company names in the Name column are links that will open a Detailed Listing page for the company selected.

Brands & Products

The Brands & Products category opens a list of trade name products the company produces.
Canadian Businesses Database

Clicking on the Canadian Businesses selection on the Home page will open the Canadian Businesses Database search page. This page has two tabs, Quick Search and Custom Search. The Quick Search tab is usually the default opening display. See page 19 for information about the Custom Search tab.

Quick Search Tab

The Quick Search tab has six criteria boxes. You may fill out one or more of these boxes to conduct a search. The boxes are Company Name, Executive First Name, Executive Last Name, City, Province and Phone.

Note: If you want to have more choices in your search criteria, you may choose to use Custom Search. Custom Search allows you to pick the criteria you want to include on your search form. See page 19 for information about the Custom Search function.

The Province criterion box has a down arrow that will open a menu that contains a list of all provinces as well as an “All” selection.

Filling in more than one box will narrow the search and allow ReferenceUSA to provide a more concise listing of businesses that meet your criteria.

Once you have filled in the search criteria you may start the search by clicking on the View Results button. Clicking on the View Results button will open a Results page. For information about the Results page, please go to page 20.
Custom Search Tab

If you want to have more choices in your search criteria, you may choose to use **Custom Search**, which allows you to pick the criteria you want to include on your search form. To access **Custom Search**, click on the **Custom Search** tab at the top of the Canadian Businesses Database page.

This will open the **Custom Search** page.

The **Custom Search** page has 22 criteria in nine categories. The categories are: **Company Name**, **Executives**, **Business Type**, **Geography**, **Phone**, **Business Size**, **Ownership**, **Financial Data**, and **Special Selects**. Each category has at least one or as many as five criteria.

The Canadian Businesses Database **Custom Search** page is similar to and operates in a similar manner as the U.S. Businesses Database **Custom Search** page. Please go to page 6 for information on how to use the **Custom Search** page.

Once you have made your criteria selections you may start your search by clicking on the **View Results** button. This will open a **Results** page, see page 20 for information about the **Results** page.
Results Page

The Results page is a tabular display of the results of your search, whether it was a Quick Search or a Custom Search.

The Results page lists businesses alphabetically according to Company Name. Each company name is a link to that company’s Detailed Listing page (see page 22).

This page also has columns for Executive Name, Street Address, City/Province, Postal Code, Phone, and Verified.

Clicking on the down arrow in the Verified column header will display a menu with four selections: Verified, Title, Employees, and Sales. The Verified icon indicates that the record has been through the Reference USA’s most stringent verification process for accuracy.

The Title selection column will display the title of the person named in the Executive Name column.

The Employees selection column will give the employee range for the company (i.e., 1-4, 50-99, etc.).

The Sales selection column will give a value range for the sales for each company.

The first column has a checkbox in the header that will put check marks in all the check boxes for each company (or remove any check marks). A check mark indicates the company in that row has been selected. You must select one or more companies to perform Print or Download operations.

The Companies on the Results page are displayed in a table in pages of 25 rows. There is a page number box (at the top and bottom of the page) that allows you to navigate from page to page. Clicking on the arrow buttons move you forward or back one page at a time. You also may enter a number into the box to jump to the desired page.

The Results pages have buttons at the top and bottom of the page. These buttons are: Details, Download, and Print.

There are also two links, New Search and Revise Search.

- **Details** (at least one company must be selected) gives you the option of viewing the details of your search results. You will be presented with the list of companies in the same detail that you would have gotten by selecting each one individually.
Download gives you the option of saving your search to a removable disk. The program limits you to saving no more than two pages (50 companies per search) at a time. To save a list you must select the companies to be saved. You do this by clicking on the check boxes beside the company.

Once you click on the Download button you are given options for selecting the file format and the level of detail. Click the radio buttons you want and then click on the Download records button.

This opens the File Download window. Click on the Save button to continue your download.

Next, the Save As window is opened. Enter a file name in the File Name data field. Click on Save when you are ready to download your list.

Print gives you the option of printing out selected results of your search. The program limits you to printing no more than 50 companies per search. To print a list you must select the companies to be printed. You do this by clicking on the check boxes beside the companies.

Once you click on the Print button you are given the option of printing a summary, details or a custom report. (Summary is the list as displayed on the Results page, Details is a list of companies as they would be displayed on each Detailed Listing Page, Custom is a report in which you select the fields.) Click the radio button you want and then click on the Preview button.

This will open a page showing what the print job will look like. Click on the Print icon on this page to print it.

Revise Search takes you back to your original search page with your original search criteria still entered. You may then select different criteria for your search.

New Search returns you to your original search page where you may select all new criteria for a completely different search.
Detailed Listing Page

Each name in the Company Name column on the Results page is a hyperlink to that business’ page. Clicking on the name opens the Detailed Listing page. This page has specific and generalized information concerning the company you selected.

This page is similar to and operates in a similar manner as the U.S. Businesses Database Detailed Listing page. Please go to page 12 for information about the Detailed Listing page.
**Header Links**

[Reference USA](http://www.referenceusa.com)

**Home**
Clicking on the **Home** link will return you to the ReferenceUSA opening screen.

**About Us**
Clicking on **About Us** will open a page with information about ReferenceUSA.

**Data Quality**
The **Data Quality** selection in the header will open a page with information about ReferenceUSA’s sources of information and quality requirements.

**Take a Tour**
Clicking on **Take a Tour** will open a page with several demos of how to perform functions in Reference USA.

**Customers**
The **Customers** selection will open a page with testimonials from various customers.

**Contact Us**
The **Contact Us** link will open a page with contact information and an e-mail form. If you are having difficulty using the ReferenceUSA program please contact a Business Library staff member for assistance.

**FAQs**
The **FAQs** selection will open a page with an expandable list of frequently asked questions.

**Resource Center**
The **Resource Center** link will open a page with information about Reference USA and the services it offers.

**Library Locator**
The **Library Locator** link will open a page with a locator search feature. Enter a zip code into the box and click on the Search button to display a list of libraries in the area.
OneSource Database
(OneSource Global Business Browser)

Opening/Home Page

When the OneSource link on the ReferenceUSA Home page is selected the OneSource Global Business Browser database is opened.

For instructions on how to use this database please refer to the OneSource Global Business Browser user guide in a separate binder.