

PharmSource Lead Sheet (PLS) **Qualifying information Search (QIS) Instructions**

The *Qualifying Information Search* feature of the *PharmSource Lead Sheet* allows you to search for companies based on various parameters related to company status, size and location. Search results are directly downloaded into spreadsheet format. All QIS searches are based on company activity reported since April 2006.

Logging in:

1. You can only log in via the link in the weekly e-mail delivery of the *PLS* (you cannot log in via our web site!). This is sent from leadsheet@pharmsource.com each week on Thursday. Just click on the embedded link in the e-mail message, which will open the issue in your browser.
2. Click on the **Qualifying Info Search (QIS)** button located in the left navigation bar. You also can access the *QIS* directly from the *Full Database Search* page.
3. This will take you either directly to the QIS page (if the system recognizes your computer), or you will go to the log in page. Here are your access codes:

User Name: Your first initial followed by your last name (no punctuation, use all lower case)

Password: Your last name (no punctuation, use all lower case)

Data Storage and Search Logic:

It's very important for you to know that the system uses "Boolean And Logic". Within an individual search option, the system uses "OR" logic (i.e., if you select multiple venture capital sources from *VC Sources*, your results will show results for all VC sources selected). When you select from multiple search options, your results will be based on "AND" logic (i.e., if you select *Private* and *101-500 employees* and *Alaska*, your results will be ONLY for companies that meet ALL of the criteria selected).

If no selections are made for one or more categories, all options in unselected categories will be included in the search.

The QIS offers six (6) search options:

1. **Public/Private:** Search for companies by ownership status (public/private).
2. **Number of Employees:** Search for companies by number of employees (by range).
3. **Revenue:** Search for companies by revenue ranges.
4. **R&D Expenditures:** Search for companies R&D expenditure ranges.
5. **VC Sources:** Search for venture capital (VC) companies that have funded pharma activity.
6. **Geographic Area:**
 - a. **Search By U.S. States/Canadian Provinces:** Lets you perform searches to include data for companies/products/activity in a specific territory. Canadian province options follow the US state options. Searching by state/province/country is useful if you focus on a specific sales territory.
 - b. **Search By Country:** Lets you perform searches to include data for only those countries in which you are interested. This is useful if you focus on a specific sales territory.

Making/deleting search selections:

1. Under the search selections options is a gold bar entitled **Profile Selections**, which has columns below that match the selection options. These columns show which selections have been made.
2. Use your mouse to select a search selection tab. When you select a tab, associated options will appear.
 - Click on the small box to the left of each item you wish to include in your search, and a check mark will appear. Selected items automatically appear in the **Profile Selections** section below. Note: You may make multiple selections from one or more tabs for a single search.
3. To delete your search selection(s): Under **Profile Selections**, select the item(s) you wish to delete, then click on **Delete Selected** and the item(s) will be deleted from your search.

View results:

At the bottom of the page, click on the gold button: **Download to Spreadsheet**. Search results are directly provided in downloadable spreadsheet format (Excel .csv file), showing results in a single row per location (potentially more than one row per company if there multiple locations are relevant to the search), based on the selected search criteria.

Spreadsheet format allows you to sort data by any field, permits mail-merge capabilities, and is compatible with most contact management software.

The naming convention used for each download is: PharmSource_MM-DD-YY_HH-mm_am/pm.csv (where MM=month, DD=day, YY=year, HH=hour, mm=minute), and applies the time using the Eastern time-zone of the USA. Be sure to rename each file you download to reflect the associated search for fast and accurate future reference.

- a. This spreadsheet will allow you to sort by and/or delete any field, based on your needs.
- b. The spreadsheet can be used as a mail-merge file. This streamlines and speeds your mailing process.
- c. The spreadsheet may be imported into contact management software, which typically accepts .csv file format. Please refer to your software manufacturer's instructions for importing data. If you don't use contact management software, the spreadsheet is a useful tool for tracking and managing lead follow-up.

Questions?

Contact anyone on the **PharmSource Lead Sheet** team at 703-383-4903 (located in the Eastern time-zone of the USA) or send an e-mail message to info@pharmsource.com. We want to help you get the most out of our service.