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Profile Anywhere Installation Guide

Need more help? Please contact DRS Support at: drssupport@dnb.com

Table of Contents

1. General

- The following document provides step-by-step instructions for installing Profile Anywhere (also known as a 'Floating Seal').

- The document will guide you through to a successful Installation of Profile Anywhere in a select email and webmail clients and other electronic documents.

- The Profile Anywhere platform supports all known browsers such as: Google Chrome, Internet Explorer, Firefox, Opera, Chrome and others.

2. Generate the Profile Anywhere Seal in OTMS

Step1: Generating the Seal and preparing the signature files

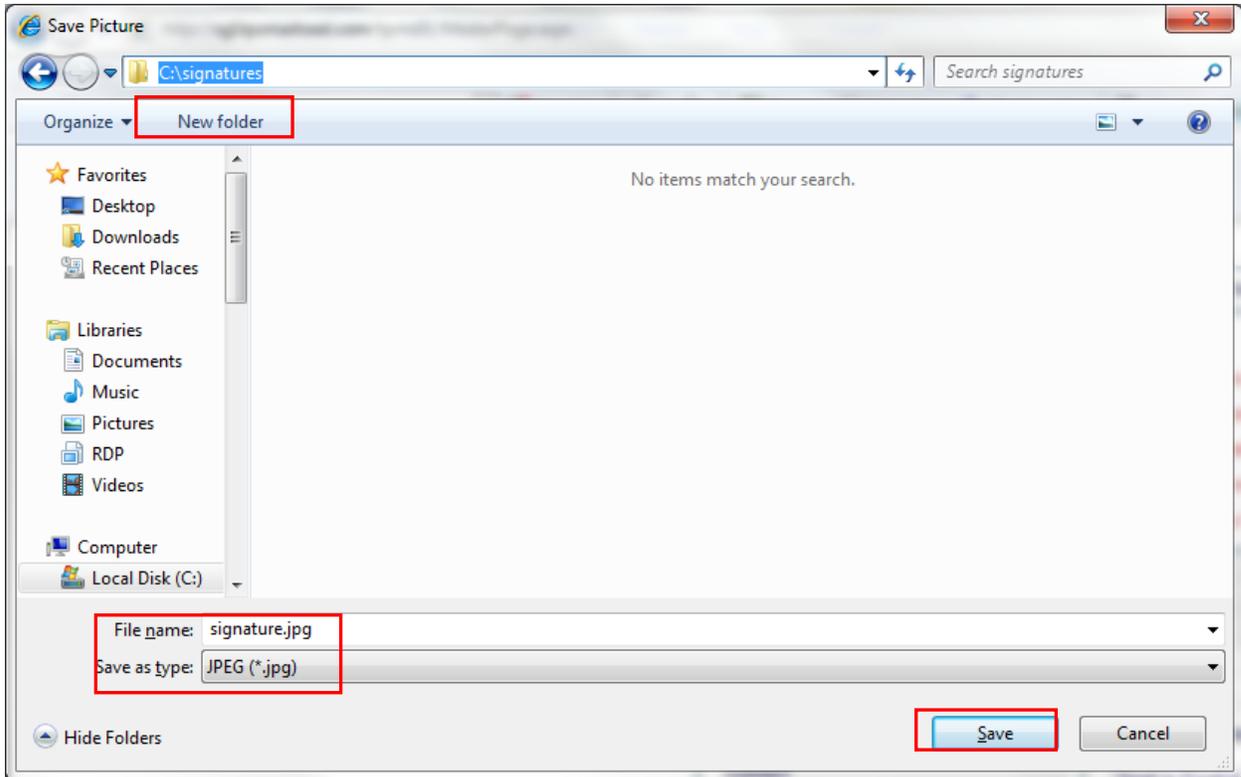- Right Click the Image and select "Save Picture as".
  Change the file location to "c:\signatures" (Create the directory or select your own directory).
  Change the file name to: "signature.jpg" and click Save.

- In the same directory ("c:\signatures") create an empty text file by Right Click and choose New
  → Text Document.

- Change the file name and Extension to: "signature.htm".

- Open the file using Right Click selecting "Open With → Notepad".
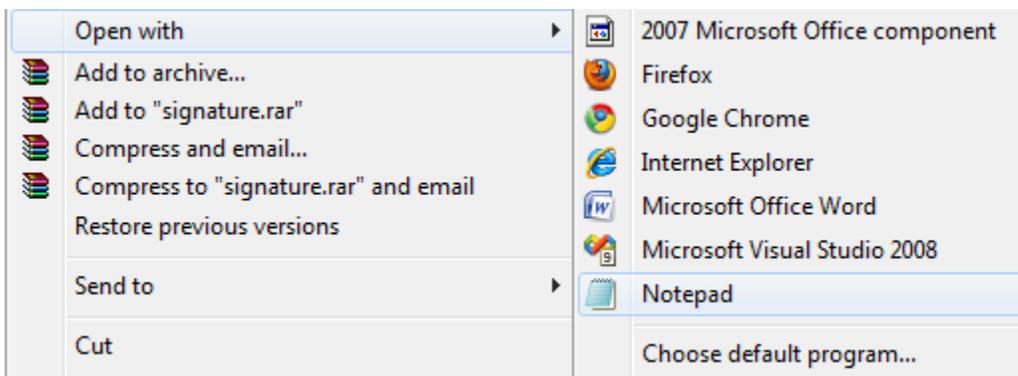
- Add the following text into the file and Save it:
  `<a href="ENTER YOUR PROFILE ANYWHERE HERE"><img src="c:\signatures\signature.jpg" style="border-style:none" /></a>`

- Replace the text "ENTER YOUR PROFILE ANYWHERE HERE" with the customer Profile Anywhere URL (from the OTMS Profile Anywhere TAB).

- Each company has a unique URL.

**Step 2: use the file in Lotus Notes.**

- Open your Lotus Notes mail file, and choose Tools - Preferences. Switch to the Mail - Signature tab, and click on "HTML or Image File". Click the Browse button, and select the file you saved earlier.

- In order to find the file, you may have to change the file type box from text to HTML, and click OK.

- Compose a new message. You should see your new signature file at the bottom.

3. Special Handling

- Profile Anywhere's built in security mechanism prevents use of the Profile Anywhere hyperlink in a website. If the hyperlink is used in a website, the profile window will display an error message indicating that Profile Anywhere seals are not for use in websites.
  This advanced security mechanism allows for exceptions in the case of Webmail applications such as Gmail. If an error message is displayed, the URL can be added to the exception list (Use the OTS Support Ticketing System to communicate your request).

- Generally when copying the seal from the "Profile Anywhere" Accordion in OTMS, the hyperlink to the profile is copied automatically with the image. In case the hyperlink is not copied, you can manually copy it from the OTMS "Profile Anywhere" Accordion:
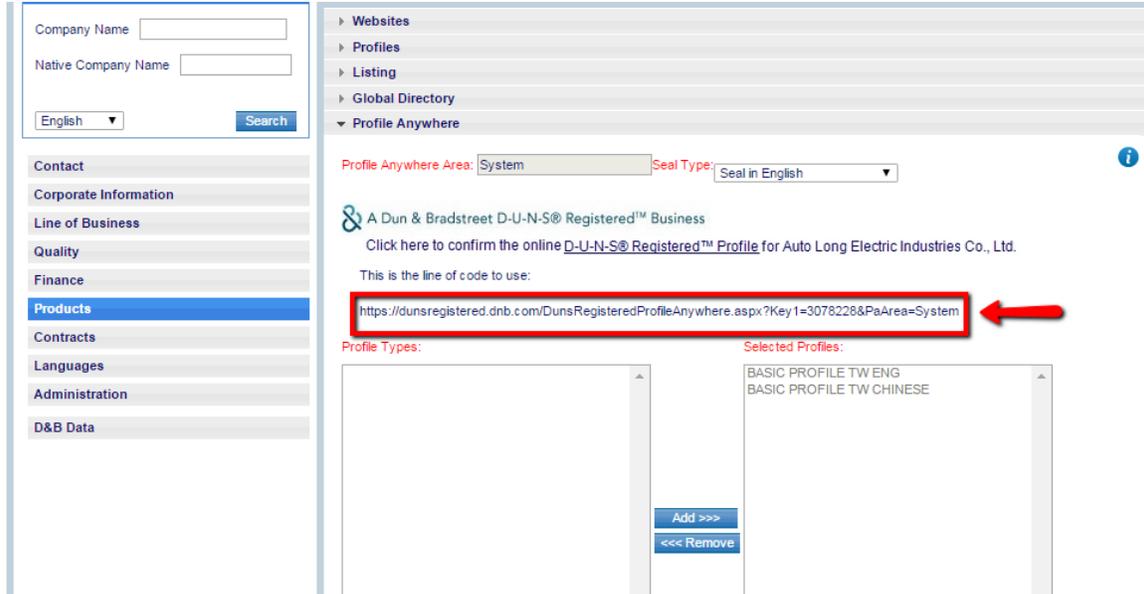
4. Microsoft: Word, Excel, PowerPoint

- In OTMS: Copy the Profile Anywhere image with the link (Right click → Copy) and paste it into the office document.

- To ensure that the link was copied, right click the Profile Anywhere Seal and select "Edit Hyperlink". In case and the "Edit Hyperlink" button doesn't appear, right click the Profile Anywhere Seal and select "Hyperlink", then type in the hyperlink in the "Address" text box. The company hyperlink can be found in the "Profile Anywhere" accordion in OTMS.

5. PDF Documents

PDF can contain hyperlinks; therefore PDF documents can contain the Profile Anywhere (Floating Seal) image and hyperlink.

6. Other Electronic Documents

The Profile Anywhere seal can be placed in any electronic document that accepts images and hyperlinks. The Profile Anywhere seal with hyperlink needs just to be copied into the document.
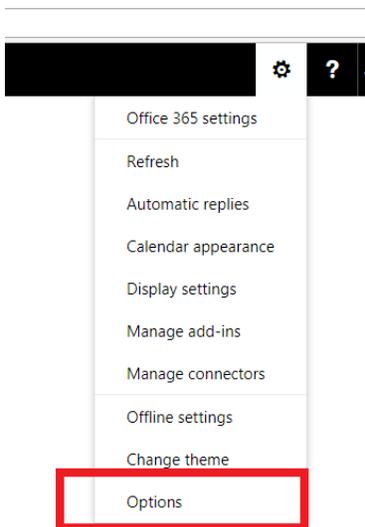
7. Email Programs

7.1 Office 365

To make a signature with Profile Anywhere, follow the steps below:
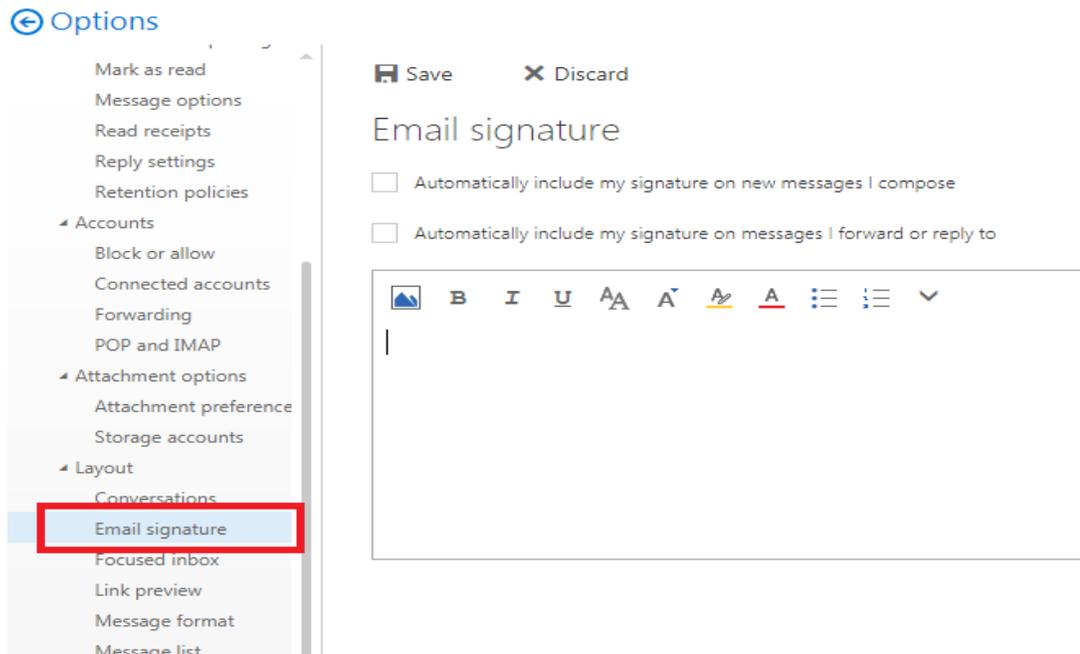
- Save the Profile Anywhere seal image to your computer.

- Sign in to Office 365

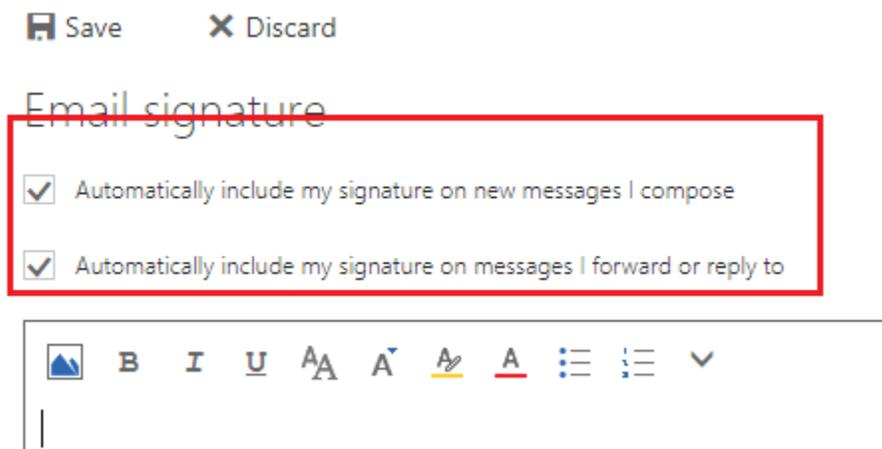- Click the gear icon ⚙ in the upper right hand side.

- Select options from the menu that will have appeared

- Click "Email Signature" in the left side menu.

- Select both option "New Messages" and "forward/reply".

- Paste the image (the profile anywhere image) under the Email signature text area and select the profile anywhere image.

- Go to more tools and then enter the profile anywhere 'one line of code' using hyperlink option and click Ok.

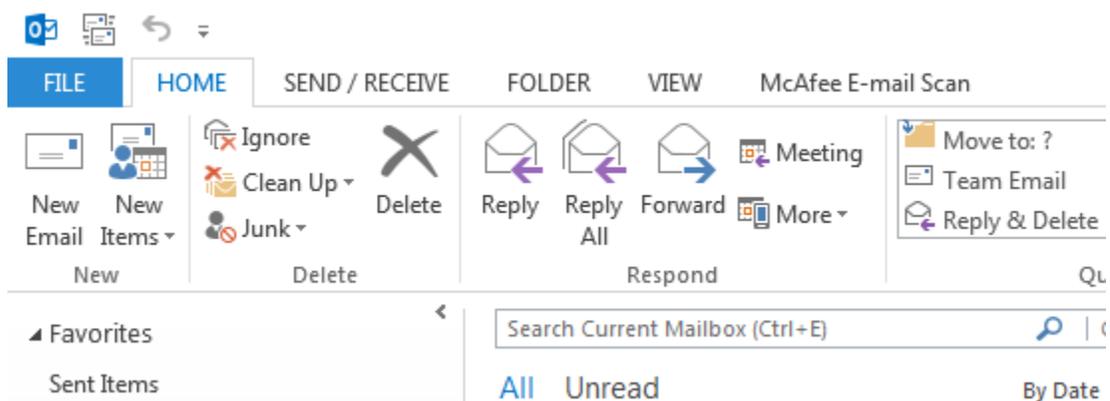- Return to home page, Click new compose mail and now you will able to see the signature.
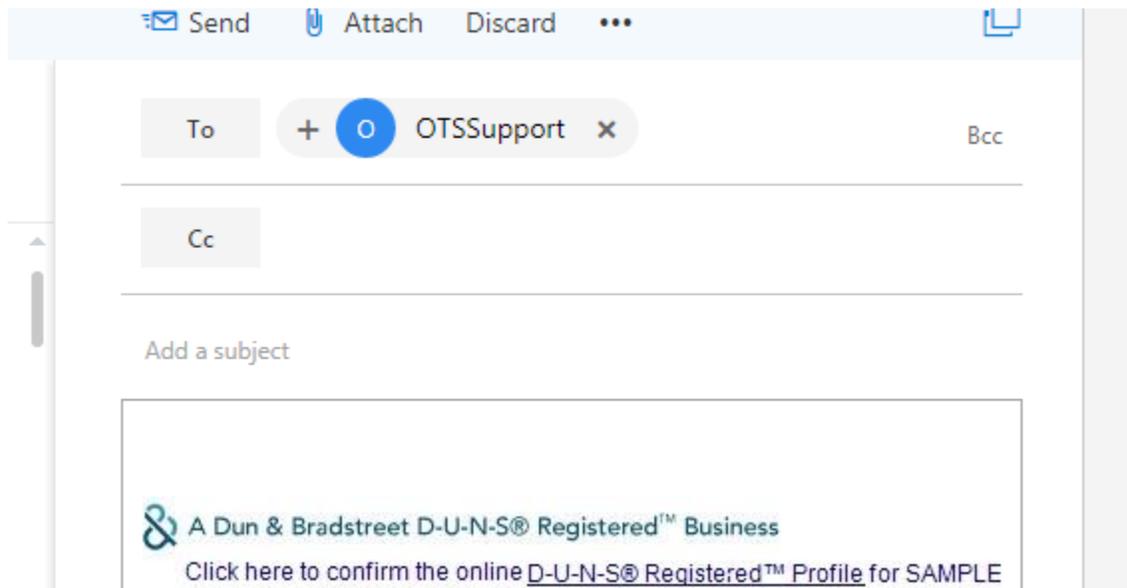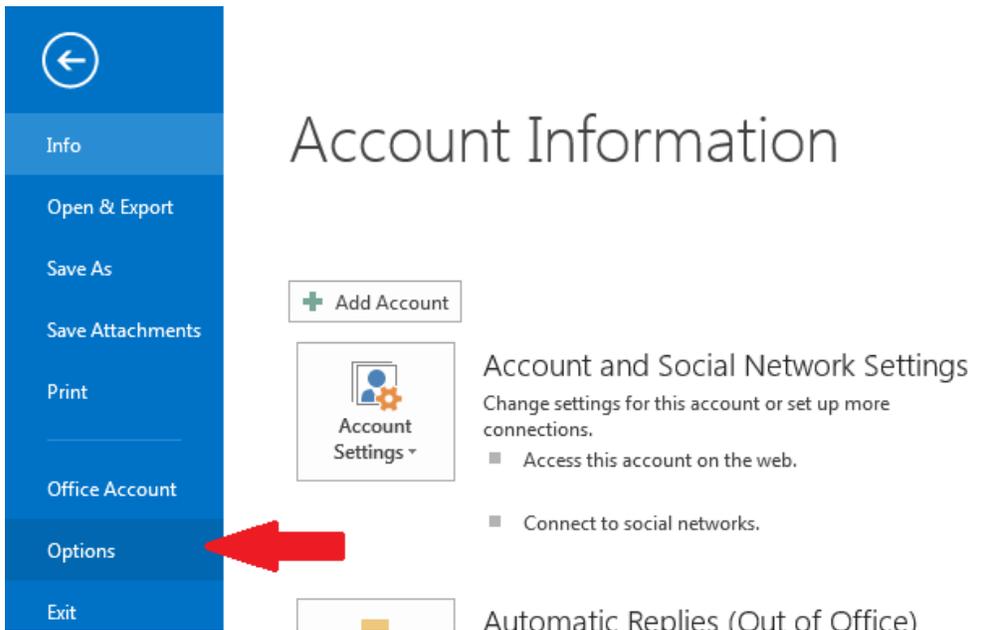

7.2 Outlook 2013

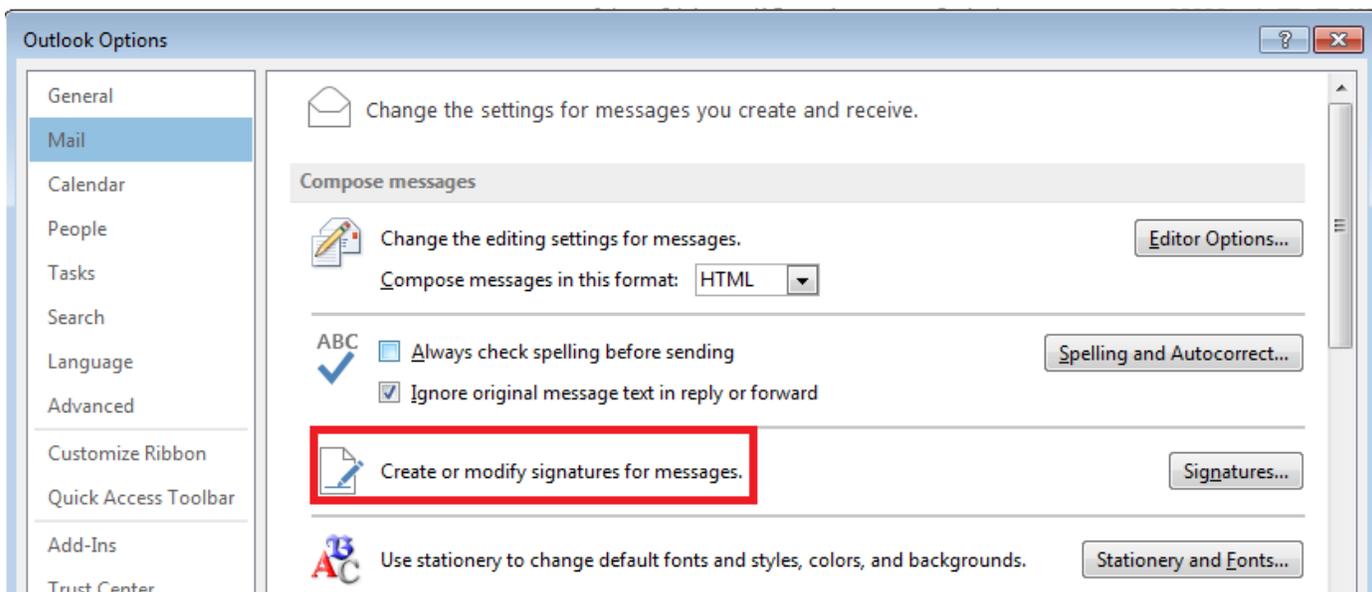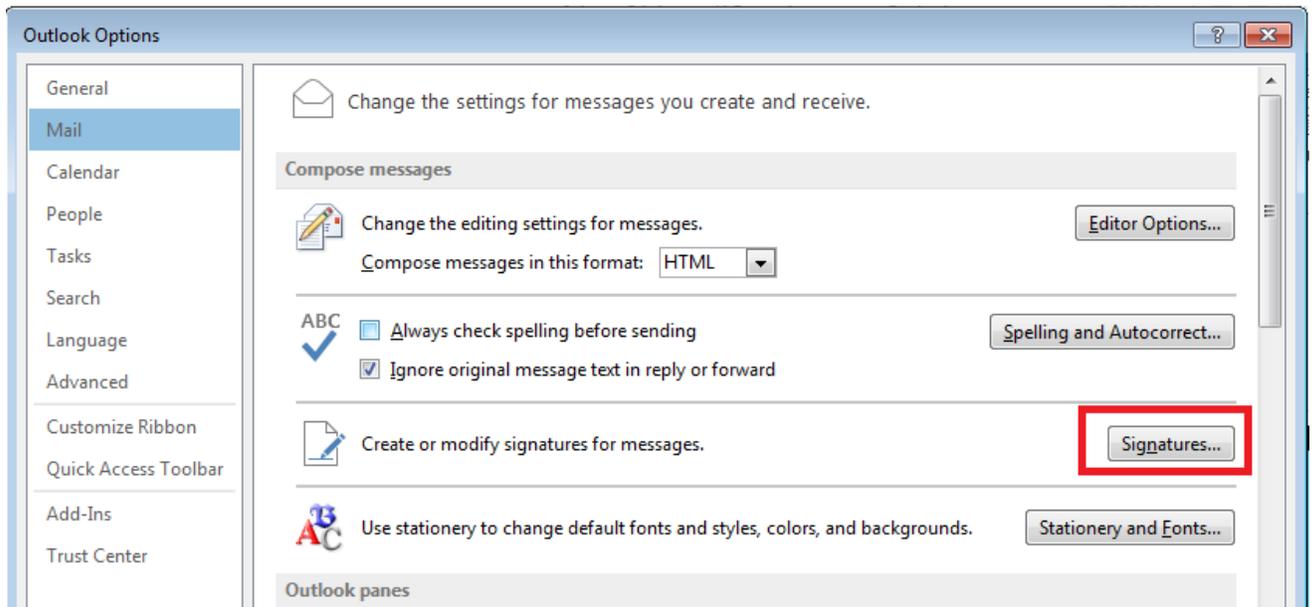- First Click Outlook2013 and select File menu in the top corner.

- Now Click **Options** menu and the Outlook Options dialogue box will be displayed.
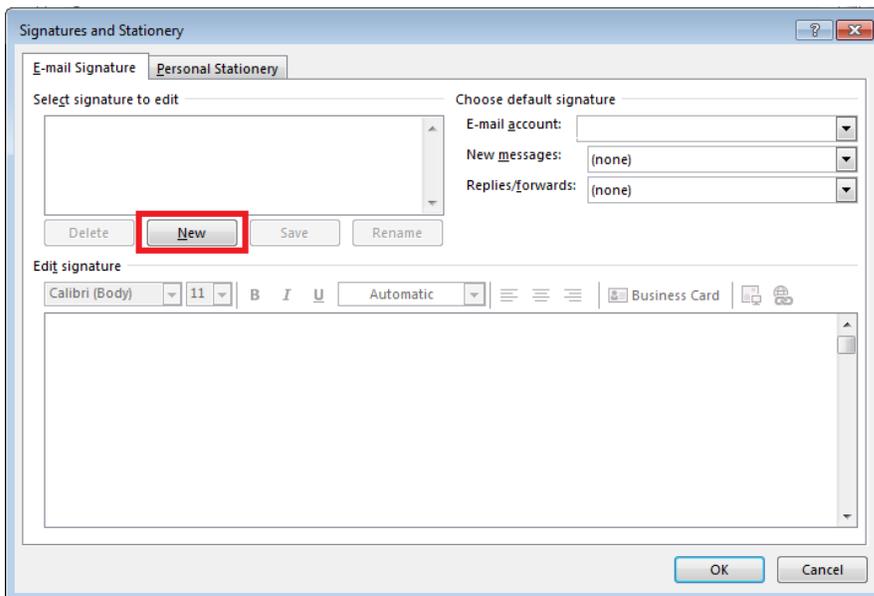

- Now click the Mail option located in the left side menu, and locate the 'create or modify signatures for messages' option in the right side main window.

- Now click the Signatures button located in beside of the 'create or modify signatures for messages' option.

- The Signatures and Stationary dialogue box will be displayed, now in order to add new signatures, click the New button.

- Paste the image (the Profile Anywhere image) under the Edit signature text area and click on the icon which is marked in "red" below. Then enter the profile anywhere 'one line of code' and click the [OK] button.

- Now your personal signature will appear at the end of every email you send.

- Click new email option on your Outlook, then your Profile Anywhere Seal will appear as signature at the bottom of the email.

7.3 Outlook 2010

- Click the Office button, and the go to **Outlook File > Options**. The Outlook Options dialogue box will be displayed.

- Then, click the Mail option located in the left side menu, and locate the 'create or modify signatures for messages' option in the right side main window.
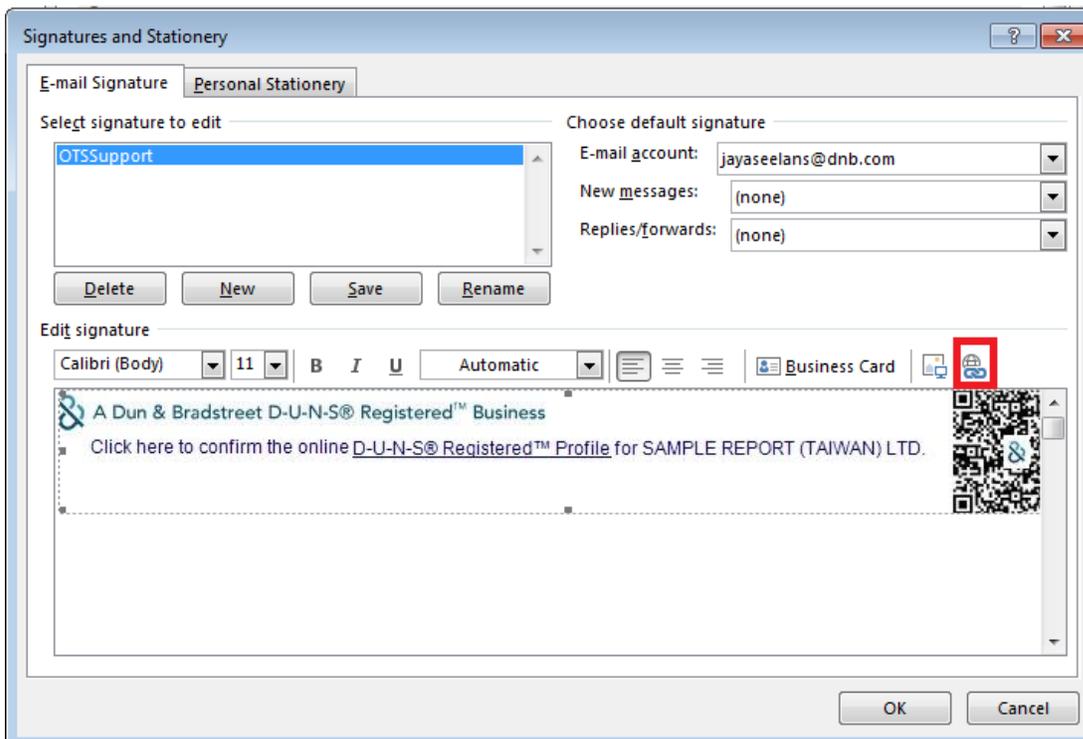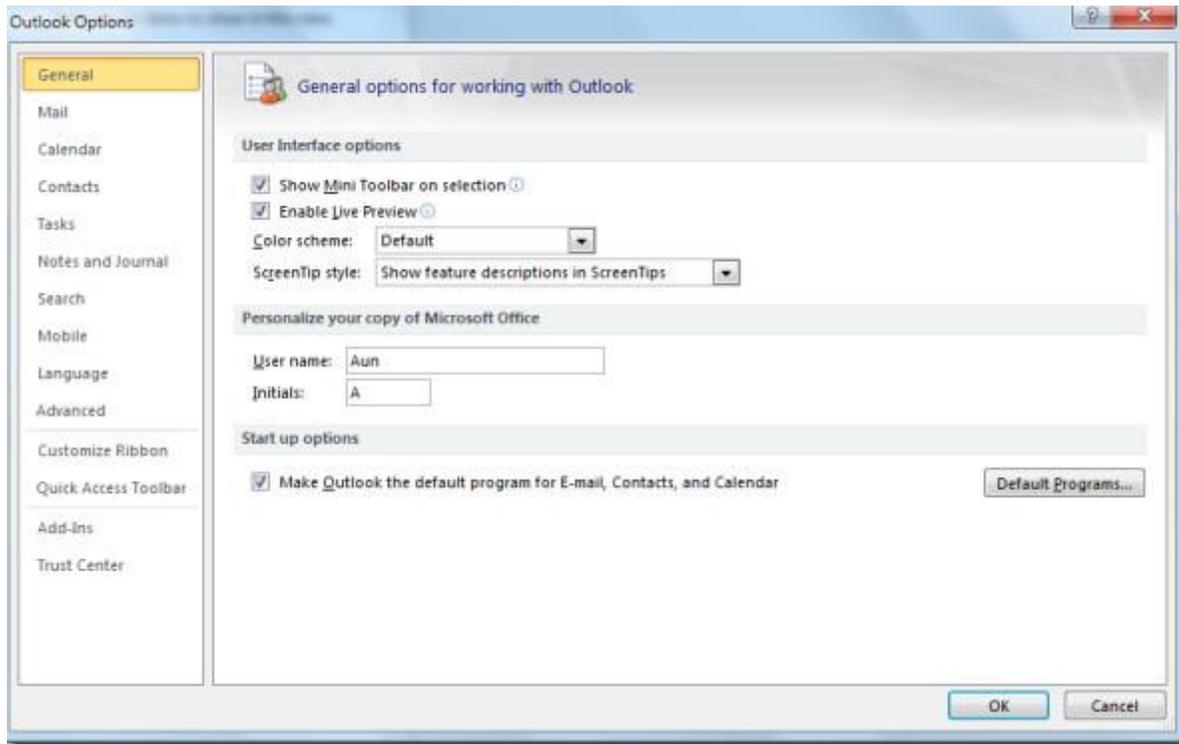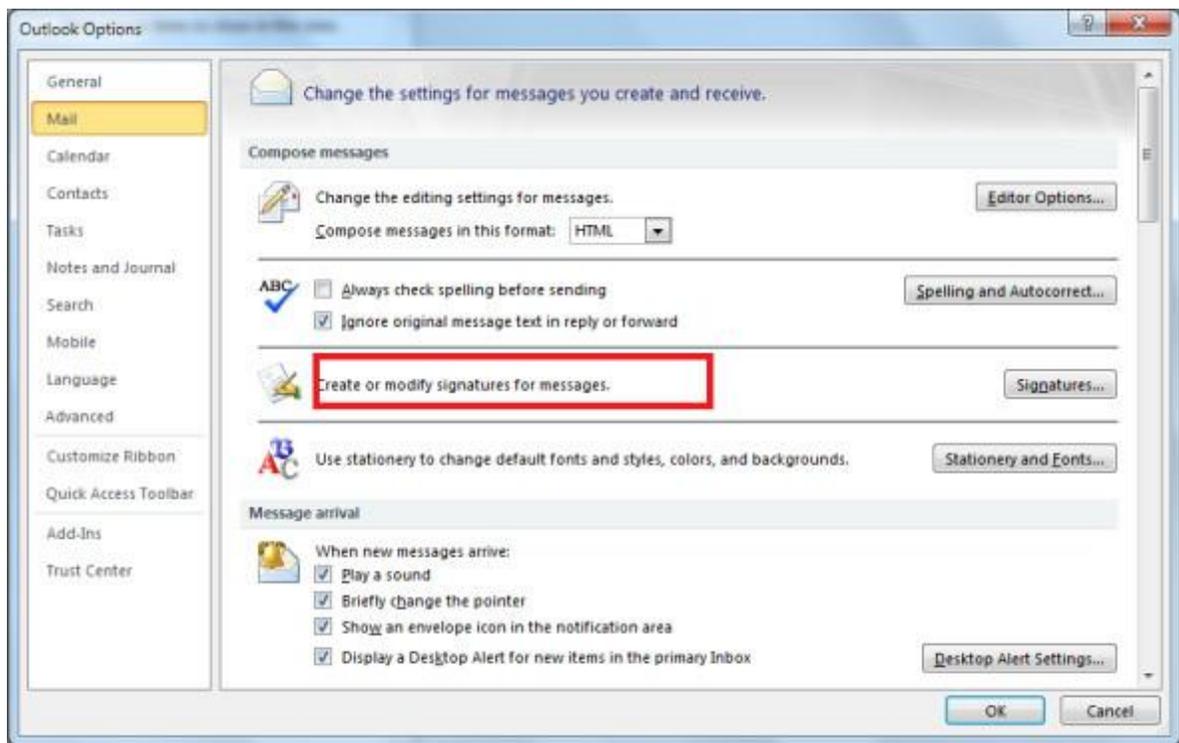
- Then, click the **Signatures** button located in beside of the 'create or modify signatures for messages' option. The **Signatures and Stationery** dialogue box will be displayed. Click the **New** button to add new a signature.

- Paste the image (the profile anywhere image) under the Edit signature text area and click on the icon which is marked in "red" below. Then enter the profile anywhere 'one line of code' and click the ok button.
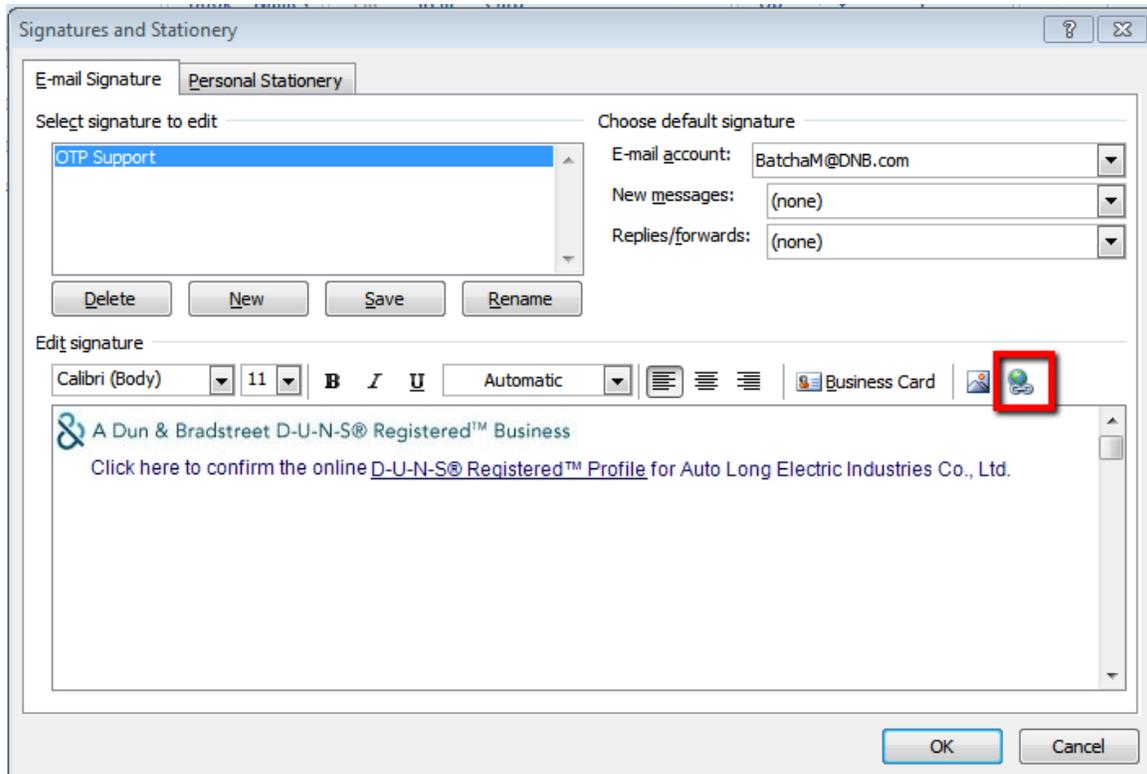
- Now your personal signature will appear at the end of every email you send.

- Click new email option on your Outlook, then your Profile Anywhere Seal will appear as signature at the bottom of the email.
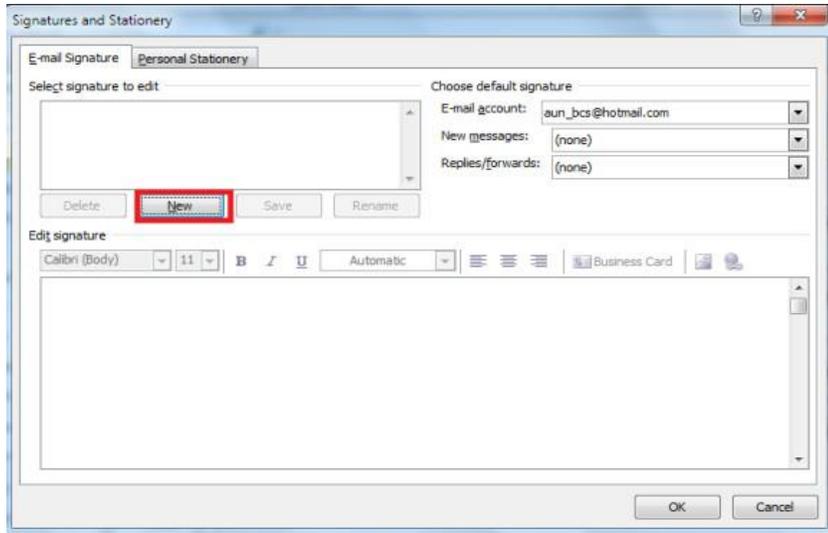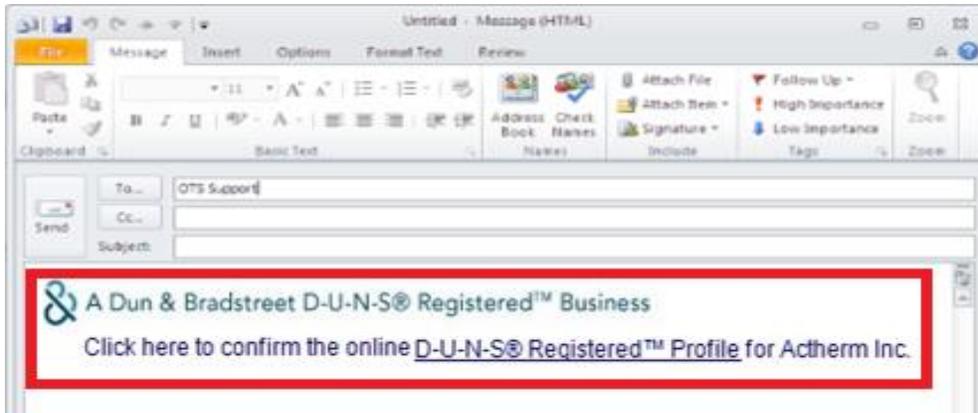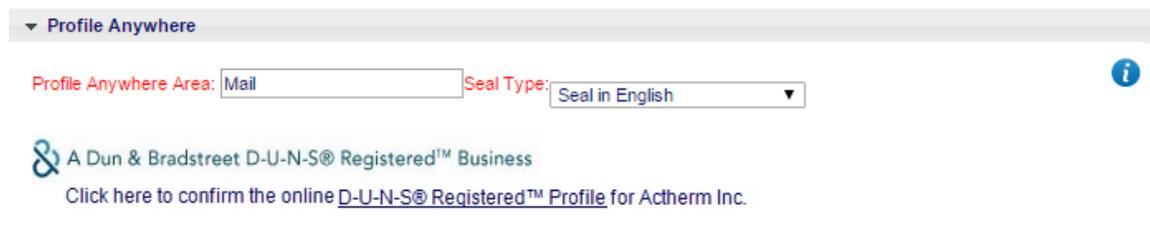

7.4 Outlook.com

To make a signature with Profile Anywhere, follow the steps below:

- Generate the Profile Anywhere in the OTMS, and save it to a location on the web. Copy the image from the web location.

- Open Windows Live outlook.

- Find the "Options" link in the upper right corner of your Inbox, and click it. The "Reading pane settings" menu will appear
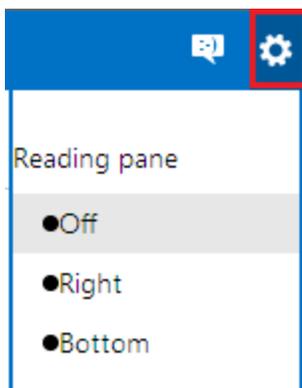
- Click the "More mail settings" menu link. You will now be taken to the "Outlook Options" page.

- In the "Outlook Options" page, find the "Writing email" sub heading located halfway down the page. Click the "Message font and signature" link. And then click the "Personal email signature link" directly below this sub-heading.
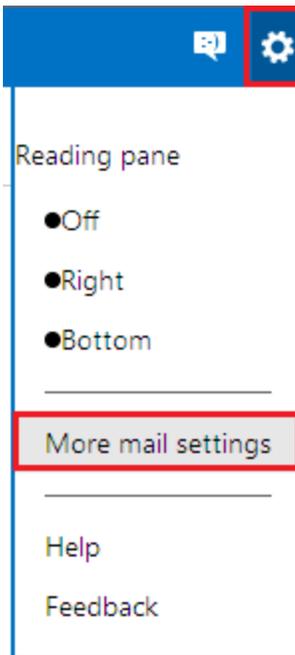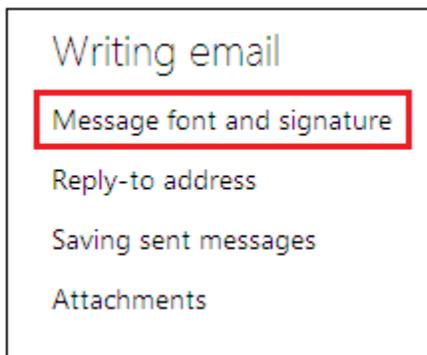

- You will now be taken to the "Personal email signature" page. Here, you will find a simple Microsoft Word-like editor for adding, formatting, and linking text to use for your default e-mail signature.

Personal signature

If you'd like to have a signature added to the bottom of each message you send, enter it below.

- The image must be on a web server, i.e. its address must start with "http://". You cannot use an image that resides only on your hard disk.

- If you use an image uploaded to a free image hosting service: Click on the image Link the image to the image's page address at the free image hosting service

- Return to the tab or window with your Outlook "Personal email signature" editor page. In the signature editor menu bar, click the arrow next to the words "Rich text" and select "Edit in HTML" from the drop down menu. The text editor box will change to an HTML editor box.

- Copy the HTML Code link to your image. Your one line of code should now look something like this.

-

- Click the Save button

- Return to your inbox, and send an e-mail to yourself.

7.5 Mac OS

To make a signature with Profile Anywhere, follow the steps below:

- Generate the Profile Anywhere in the OTMS, and save it to a location on the web. Copy the image from the web location.
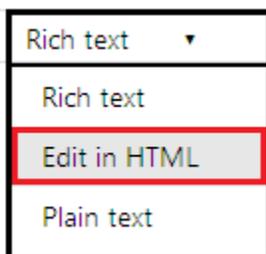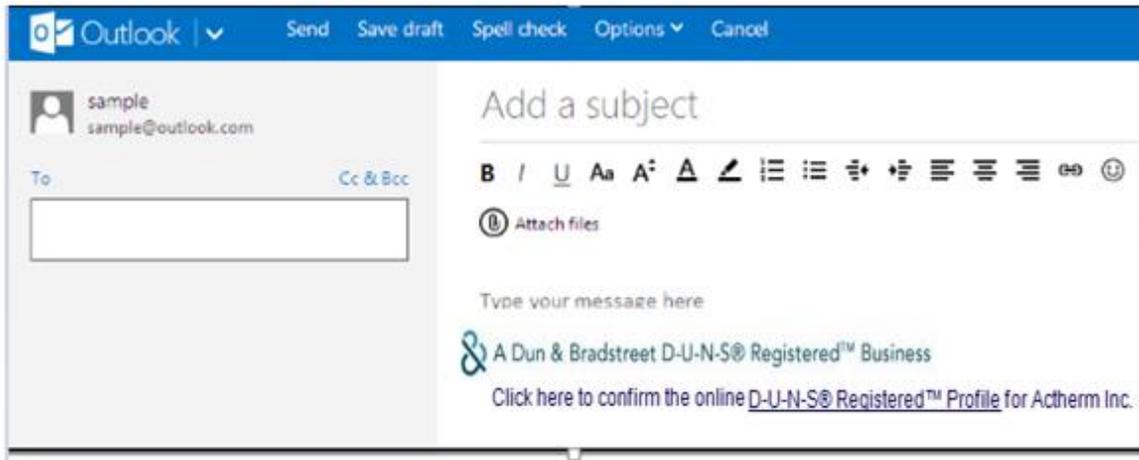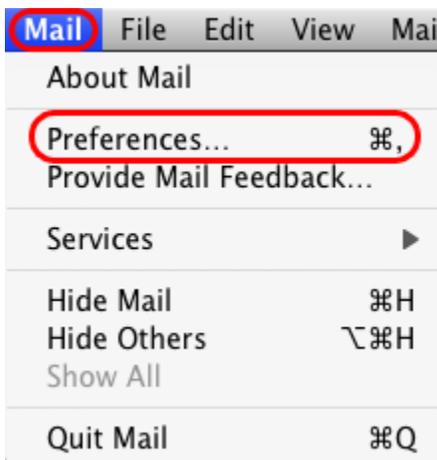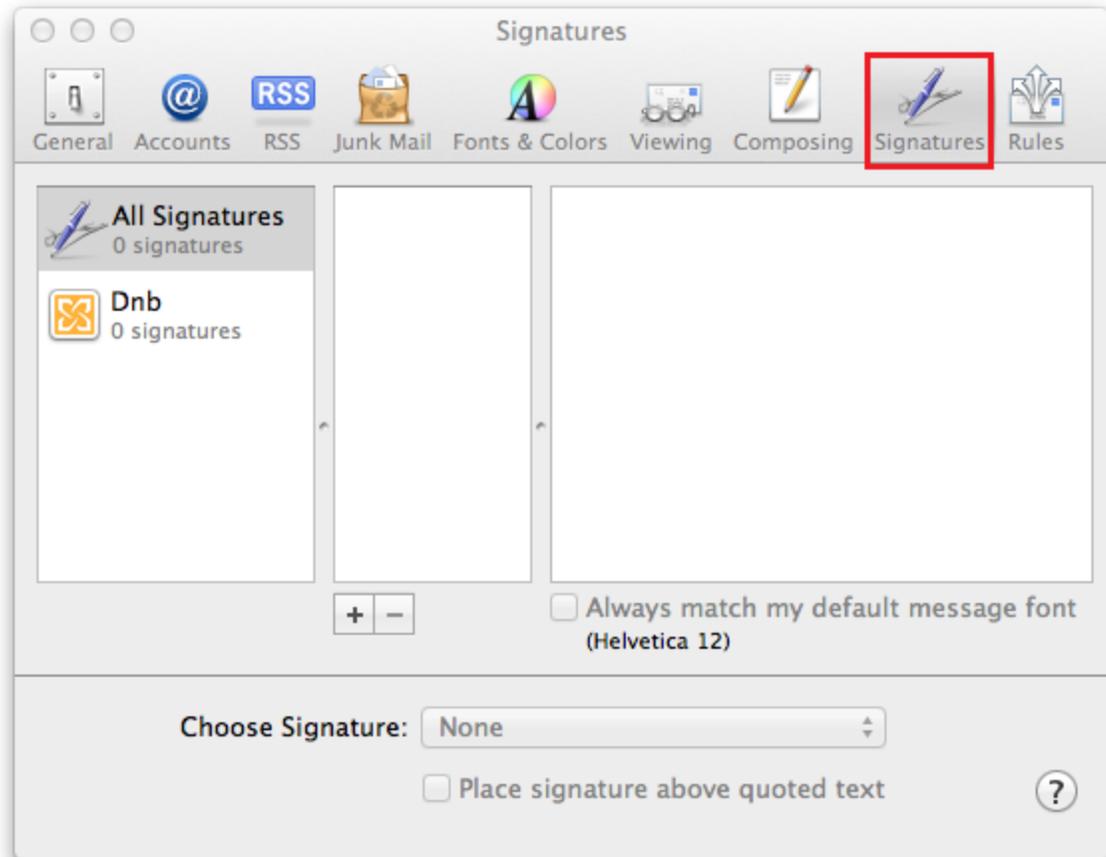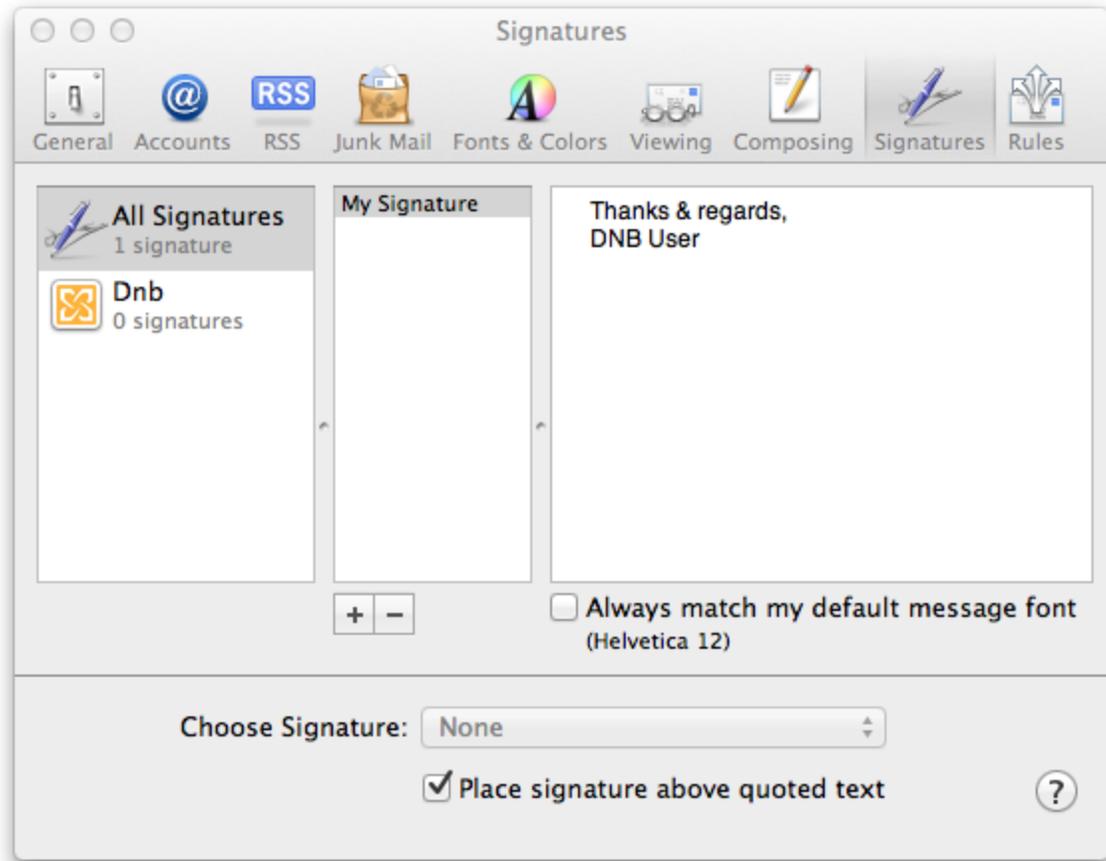

- Open mail app and Click Mail **| Preferences Option**

- In the Mail Preferences window, click the Signatures icon.

- If you have more than one email account, select the account for which you want to create a signature.

- Click the plus (+) icon near the bottom of the Signatures window

- Open a Finder window. In the menu bar on the very top of your screen, click "Go". With the "Go" menu displayed, click and hold the "option" key on your keyboard to toggle the visibility of "Library" in the menu. Go ahead and select the "Library" option which will open a new window.
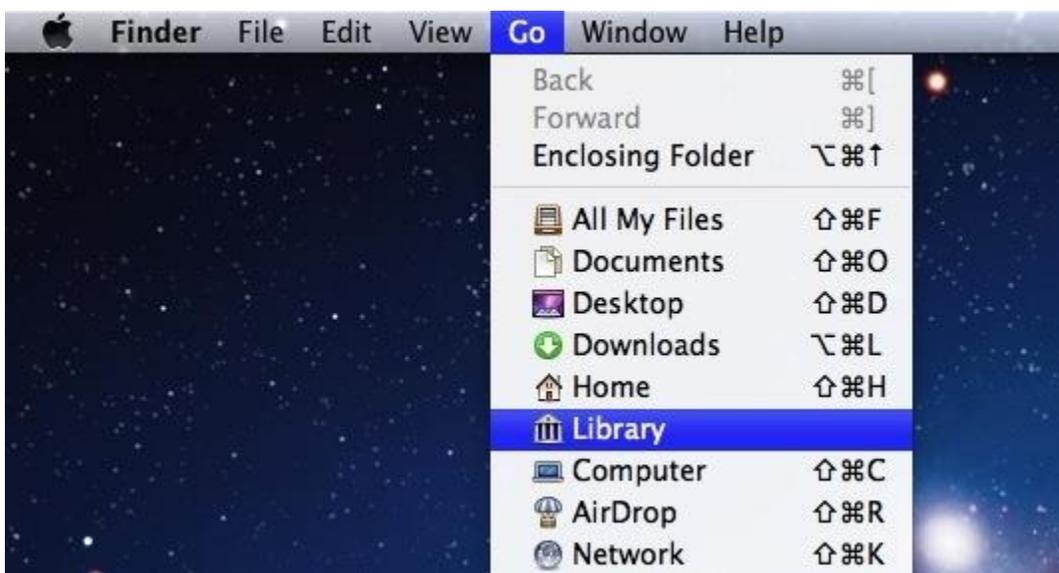
- Drill down to "Library > Mail > V2 > MailData > Signatures". You should see a file with the extension .webarchive in here. Which we will soon replace with our fancy HTML version.

Note: Make note of the signature file name (copy the file name) this will be used in the upcoming steps.
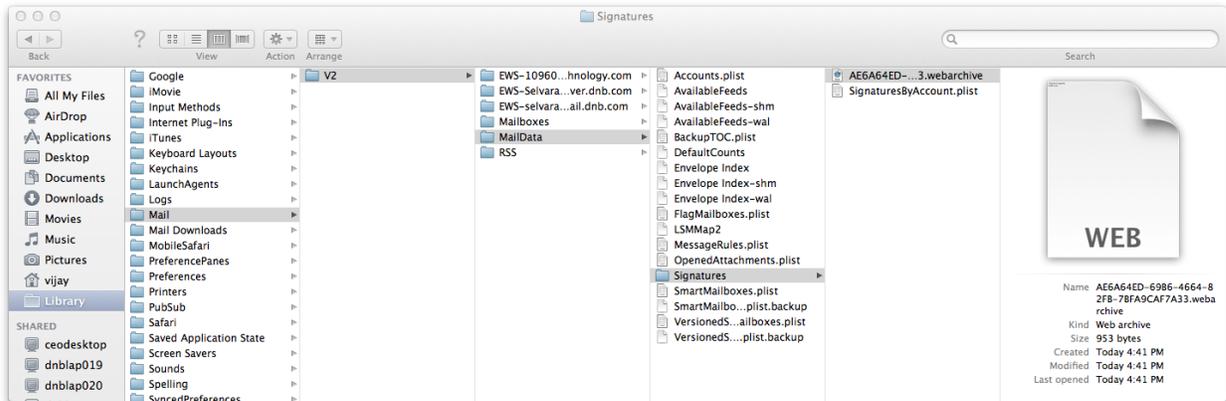
- The image must be on a web server, i.e. its address must start with "http://". You cannot use an image that resides only on your hard disk.

- If you use an image uploaded to a free image hosting service: Click on the image Link the image to the image's page address at the free image hosting service

- Copy the HTML Code link to your image. Your one line of code should now look something like this.

-

- Create your signature in your HTML editor of choice.

```
1    <br>
2    <div>
3        <p>Thanks,</p>
4        <a href="http://imageshack.us/photo/my-images/5/dranywhere1221020121331.jpg"/>
5            <img src="http://imageshack.us/a/img5/3797/dranywhere1221020121331.jpg"/>
6        </a>
7    </div>
8    </br>
```

- Once you have your email signature designed and laid out just as you like, save the file to your Documents and call it "mail_signature.html"

- Open Safari, drag your newly created "mail_signature.html" file into the Safari window. You should now see your signature in Safari.


Thanks,

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Click here to confirm the online D-U-N-S® Registered™ Profile for Actherm Inc.

- With Safari open and your signature visible, click on File in the top menu, and select "Save as…" Make sure that the "Web Archive" is selected in the format menu and save your signature as a .webarchive (Paste the file name which you have copied earlier in step) to your "Library > Mail > V2 > MailData > Signatures".
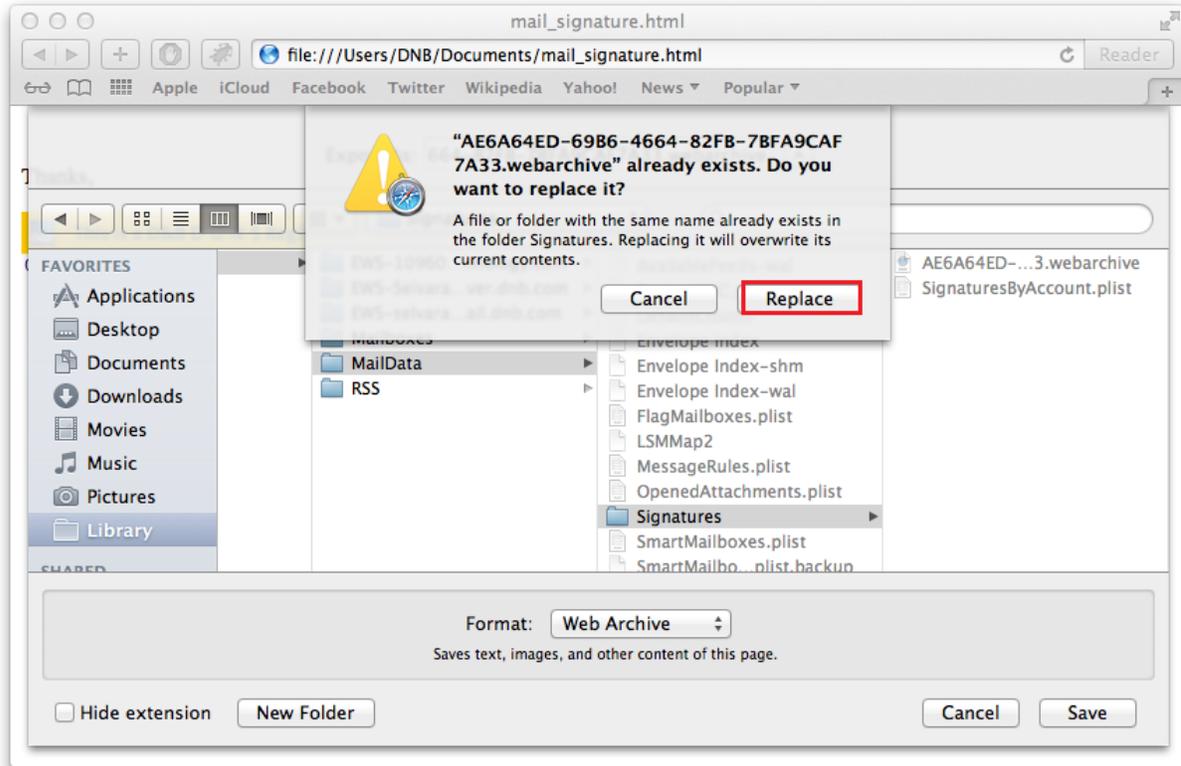
- Restart the Mail.app and go into the preferences Mail > Preferences > Signatures. You should see something very similar to this screenshot.
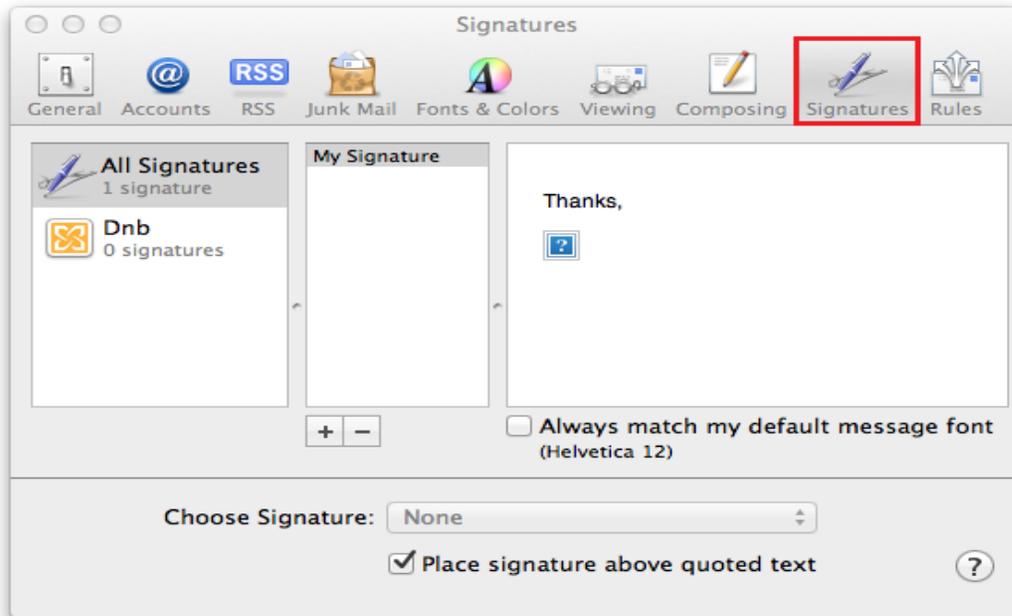

- Click on Red Marked button.
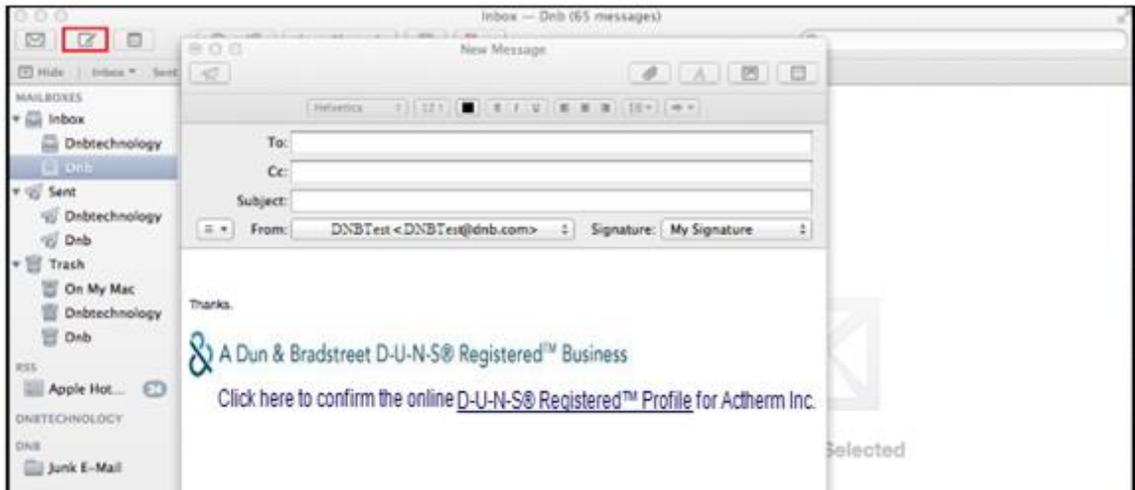
7.6 Gmail

This installation can be done using Firefox or Opera browsers (Do not use Internet Explorer). To make an email signature with a Profile Anywhere seal follow the steps below:

- Save the Profile Anywhere seal image to your computer.

- Logon to Gmail

- Click the gear icon ⚙ in the upper right hand corner.

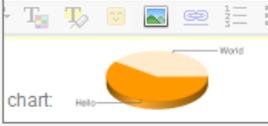- Select Settings from the menu that will have appeared
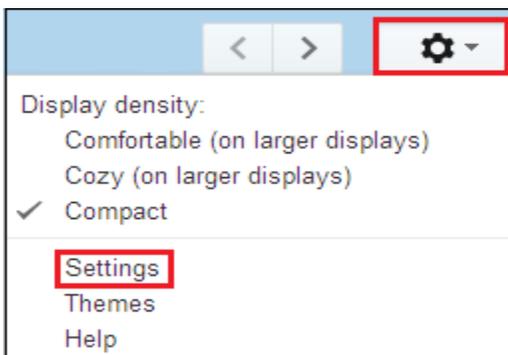
- Navigate to "Labs"

- On the Google Labs page, find "Inserting Images" and "Canned Responses" and enable them both.

- Navigate to the end of the page and save the changes.

- Go to "Compose Mail" and make sure you have no signature. Then click enter a number of time (e.g. 15 times.), to allow some empty lines.
- Click the small picture button.
- Upload the Profile Anywhere seal image that you saved earlier.
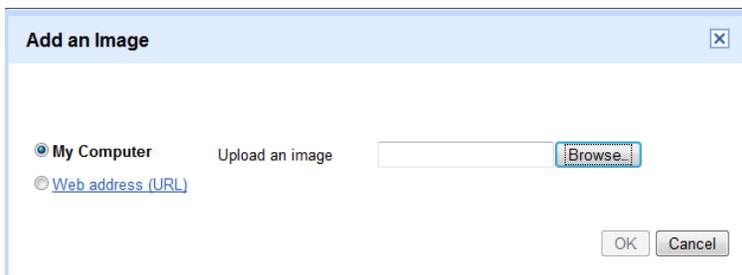
- After the seal image appears, select the image, click on the "Link" button, and paste the Profile Anywhere link.
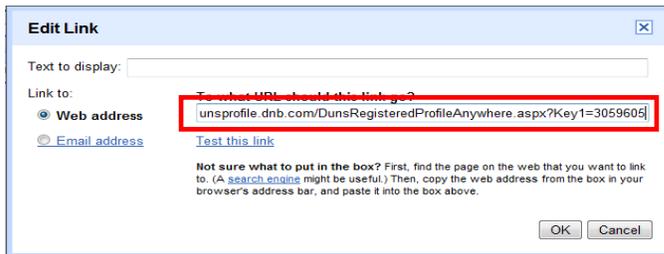
- Click "Canned Responses". A drop-down menu will open.

- Click "New Canned Response..." and save your Profile Anywhere signature with a descriptive name such as "Profile Anywhere".
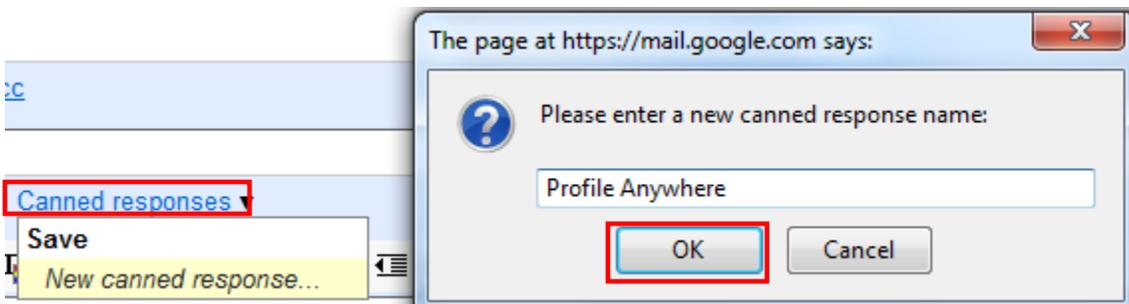

- Once you have saved your signature, make sure it is saved by clicking "Canned Responses" again and checking that the name you saved appears. After this you may discard the mail.
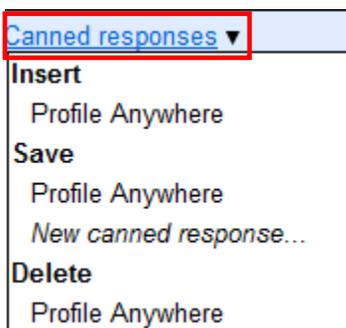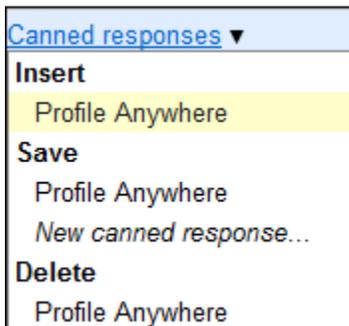

- Once the installation is done your Profile Anywhere signature will be available in all browsers.

- To use your Profile Anywhere signature, select "Compose Mail".

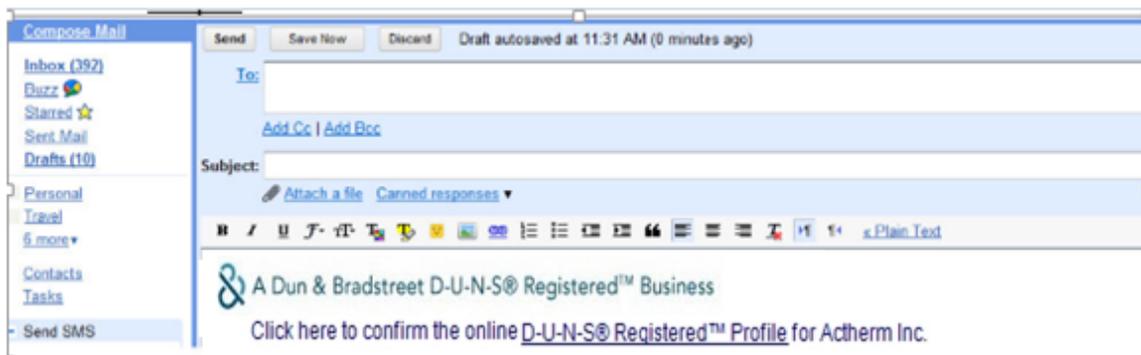- Click "Canned Responses" and select your saved Profile Anywhere signature.

Step 1
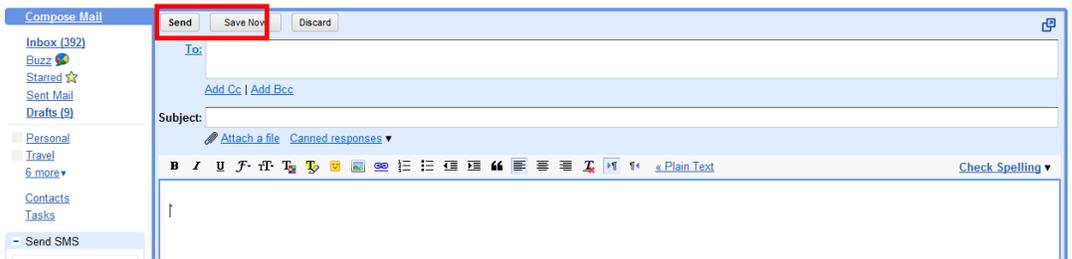
<u>Step 2</u>

<u>Step 3</u>

7.7 Yahoo!

To make a signature with Profile Anywhere, follow the steps below:

- Generate the Profile Anywhere in the OTMS[1] and save it to a location on the web. Copy the image from the web location.

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[1]The image must be on a web server, i.e. its address must start with "http://". You cannot use an image that resides only on your hard disk.

- Open Yahoo! Mail.

- Select *Options | Mail* Options from the top right navigation area.

- Go to the Signature category.

- Select "Show a rich text signature".

- Follow the Rich Text link, if available.

- Position the cursor where you want to insert your image.

- Click on "paste".

- After the image appears, hover your mouse over your Profile Anywhere and click on the "Hyperlink" button.

- Enter your profile link URL.

Please enter the URL for the link to point to:

http://Gotcsswebsite01.sg1tpsmartseal.c

OK   Cancel

- Click 'Save' button.

Append a signature to the emails you send   Save

Show a rich text signature

Sans Serif 1   10   B   I   U

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Click here to confirm the online D-U-N-S® Registered™ Profile for Actherm Inc.

- Compose new mail

- Check that your Profile Anywhere attach to your mail automatically.

Send   Cancel   Save as Draft

TO: +
CC: +   Add BCC
SUBJECT:

Attachments   Emoticons   Format   Sw

A Dun & Bradstreet D-U-N-S® Registered™ Business
Click here to confirm the online D-U-N-S® Registered™ Profile for Actherm Inc.

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