

《Portal-HK User Guide》

About Us

Global Leader in Commercial Data and Analytics

Dun & Bradstreet helps companies around the world improve performance through the power of data and analytics. We do this through our data and insights, which are delivered through the Dun & Bradstreet Data Cloud and the range of solutions it powers. Comprising over 420 million business records and thousands of attributes, our data is curated from tens of thousands of sources – both online and through our World-Wide Network of data partners around the globe – and is updated five million times each day. It encompasses the companies that make up the majority of the world's GDP – meaning the companies you are most likely to do business with.

In Hong Kong, we offer a dynamic set of solutions in Risk Management, Compliance, Sales & Marketing, Master Data and Analytics that are tailored to help businesses across industries mitigate risks and find meaningful growth. Since 2004, Dun & Bradstreet has been appointed by the Hong Kong Association of Banks (HKAB) and the Hong Kong Association of Restricted License Banks and Deposit Taking Companies (DTCA) to operate the Commercial Credit Reference Agency (CCRA), which was established to provide access to reliable credit information for SMEs and lending institutions in Hong Kong.

D&B Portal-HK is a convenient self-service platform designed specifically for SME owners. This product manual aims to provide both new and existing customers with an entry guide and a helpful document outlining the relevant operational steps on the Portal-HK platform.

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1. User Registration & Login

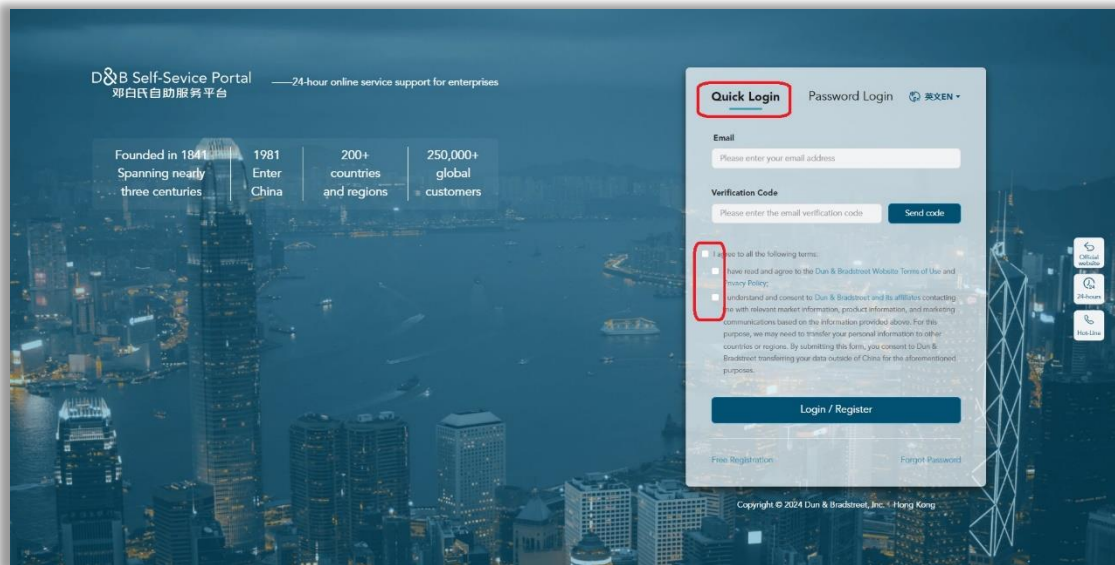
To register and log in, enter the following address in your browser:

<https://hk.dnbportal.cn>

1.1 Registration & Login Method

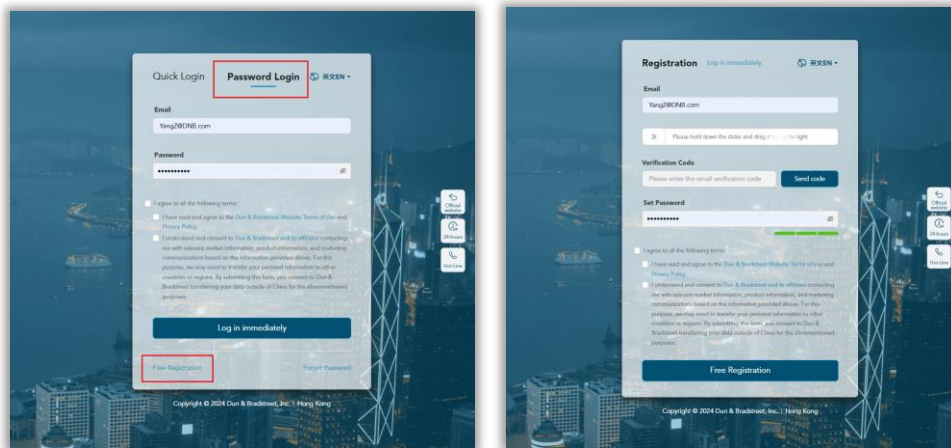
1.1.1 Quick Login

- 1) On the registration and login homepage, click the "Quick Login" button in the top right corner.
- 2) Enter your email address (the email address will be your default login account), and click "Send Code."
- 3) You will receive an email from service@dnb.com. Enter the verification code from the email into the Portal-HK.
- 4) Check the "Agree to Terms" box.
- 5) Click "Login/Register" will into Portal-HK homepage



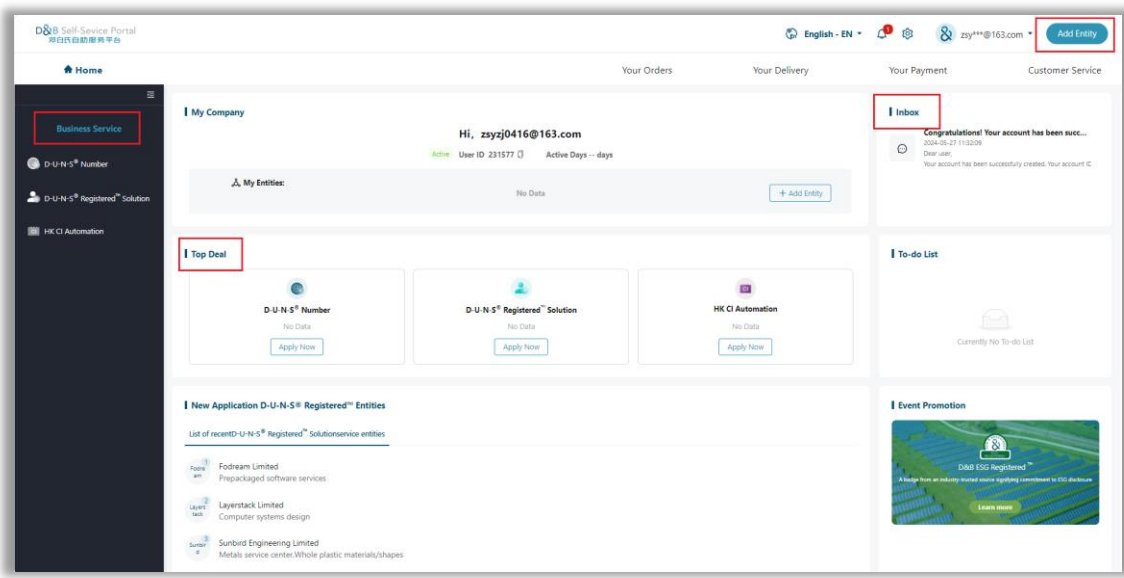
1.1.2 Password Login

- 1) Register Account: Click "Password Login," then click "Free Registration."
- 2) Get Verification Code: Obtain the verification code via email.
- 3) Set Password: Set your password.
- 4) Agree to Terms: Agree for all following Terms then click "Free Registration."
- 5) Login: Enter your email (which will be your default account) and password, then click "Login/Register" to enter the Home Page



2. Home Page

- 1) **Add Entity:** Users authenticate the business entity they represent. This entity will be the legal and contracting party for all services and functions used on the Portal-HK platform. Note: To apply for a D-U-N-S Number, you must first apply for business entity authentication.
- 2) **Business Services:** A list of products/services provided by Dun & Bradstreet. Click on the corresponding product/service to access the application page.
- 3) **Top Deal:** View any Top popular products that have already ordered from Dun & Bradstreet.
- 4) **Inbox & To-Do List:** Helps users manage and handle various messages centrally. Through the message center, users can:
 - Stay Updated: View the latest review results, service progress, and the delivery status of products and services to ensure users are informed of the latest developments.
 - To-Do Reminders: Receive reminders for to-do items to ensure users handle important matters promptly and do not miss any critical operation



3. Entity Verification

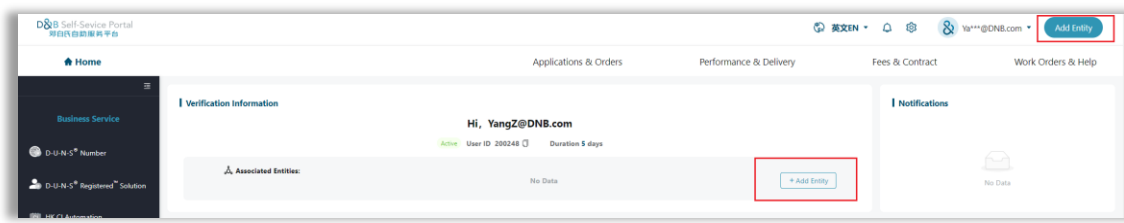
3.1 Add Entity

Add Entity: Users authenticate the business entity they represent. This entity will be the legal and contracting party for all services and functions used on the Portal-HK platform.

- Note: To apply for a D-U-N-S Number, you must first apply for business entity authentication.

In Home page there have two place can “Add Entity ” pls check below pic

- Remark: If you need to apply for a D-U-N-S Number, you can do so immediately after submitting the Add Entity form without waiting for the entity authentication to be completed.

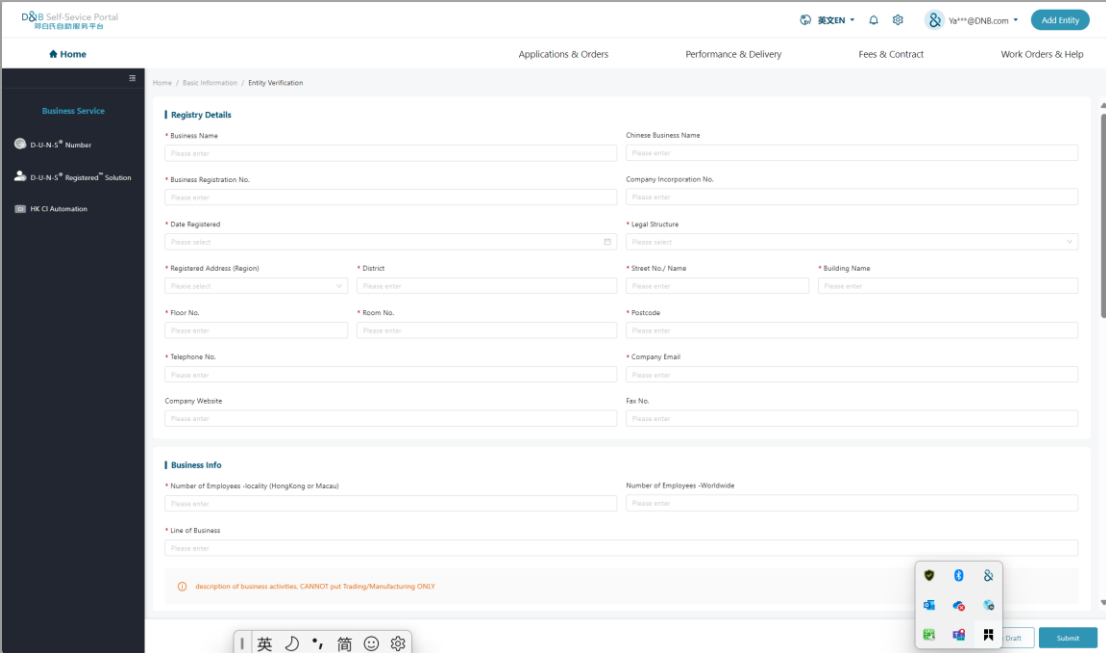


3.2 Submit Entity Information

Clicking on "Add Entity" will take you to the registration page. Please fill in the relevant information accurately based on your company's situation.

Required Materials:

- a) Latest Business Registration Copy
- b) Latest Annual Returnfiled (Only for Limited Company)
- c) CEO & Finance in-charge 's name/title/Email/Executive Name cards

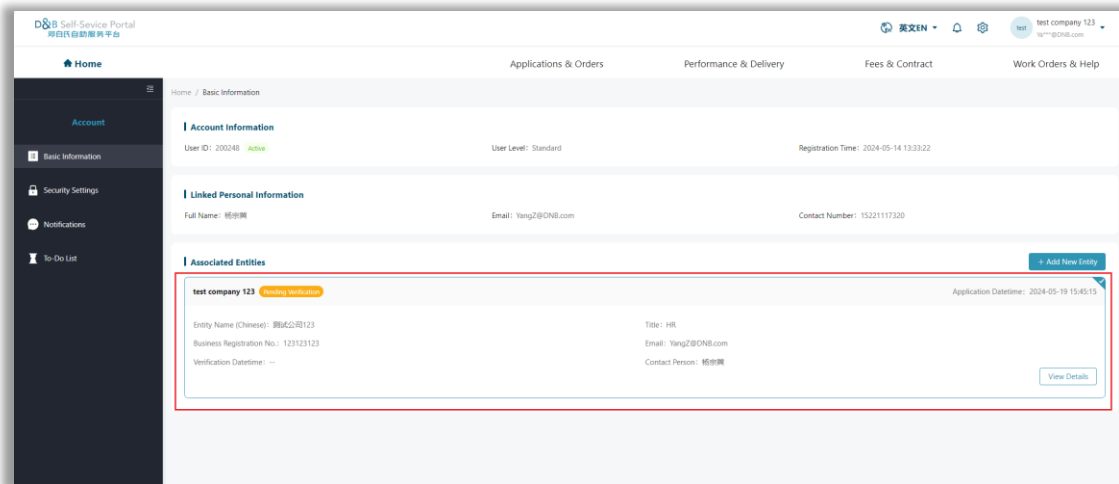


The screenshot displays the 'Entity Verification' page within the D&B Self-Service Portal. The page is titled 'Home / Basic Information / Entity Verification'. The form is divided into two main sections: 'Registry Details' and 'Business Info'. The 'Registry Details' section includes fields for Business Name (English and Chinese), Business Registration No., Date Registered, Registered Address (Region, District, Floor No., Room No.), Telephone No., Company Website, Chinese Business Name, Company Incorporation No., Legal Structure, Street No./Name, Building Name, Postcode, Company Email, and Fax No. The 'Business Info' section includes fields for Number of Employees (locality and worldwide) and Line of Business. A note at the bottom of the form states: 'description of business activities, CANNOT put Trading/Manufacturing ONLY'. The page also features a navigation menu on the left, a top navigation bar with 'Add Entity' button, and a footer with language and accessibility options.

3.3 Check Entity Verification Process

Once you have completed filling in all the information, you will be automatically redirected to the "Basic Information" page. A "Pending Verification" status of Associated Entities will be generated. Click on "View Details" to review the submitted information.

- Note 1: Verification is expected to take 5 working days.
- Note 2: When you create a business entity authentication, the default entity will be used for logging into your account.



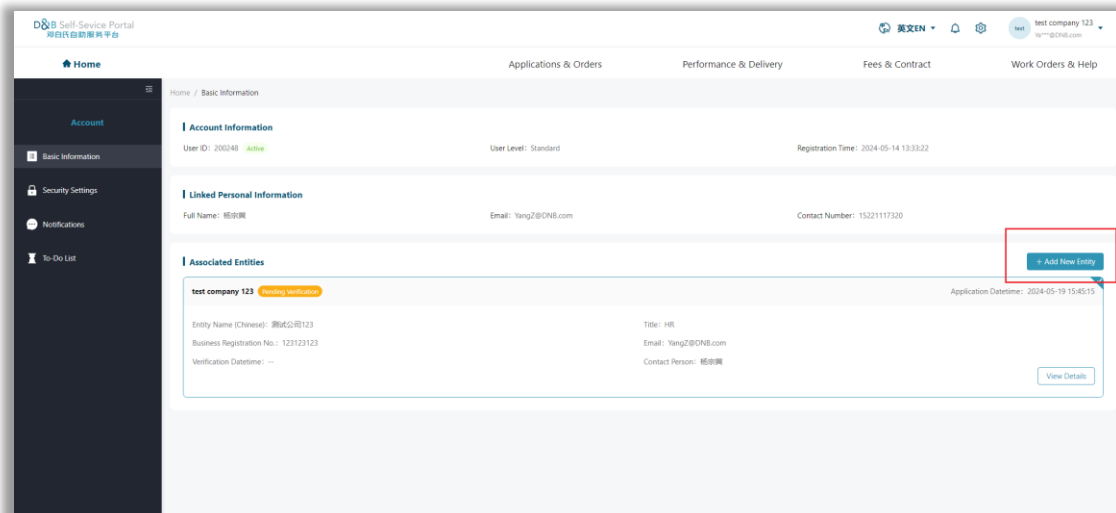
3.4 Notification of Identity Verification

Once the business entity authentication process is completed, we will notify you of the verification results via email. You can also check the latest results on the "Basic Information" page.

3.5 Add another Entity

If you need to add a second company, you can do so by clicking the "Add New Entity" button on the "Basic Information" page. This will take you to the identity information filling page for the second company.

- Note: Currently, each user can apply for up to 3 companies.



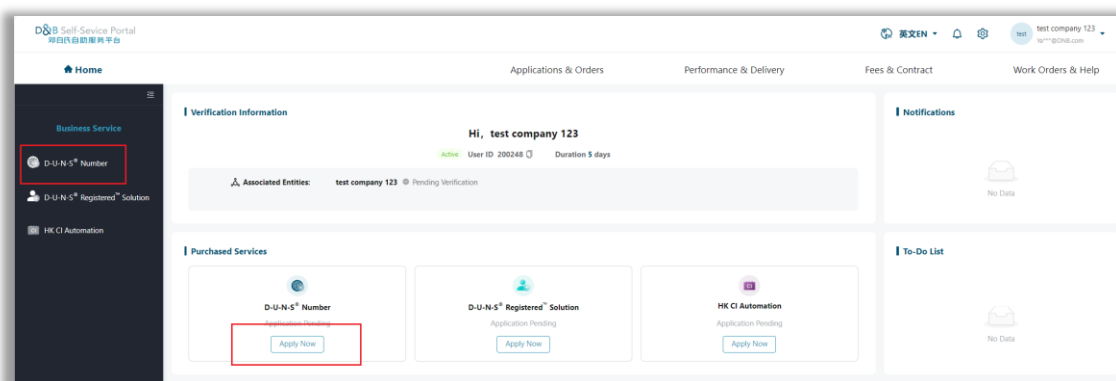
4. D-U-N-S® Number Application

4.1 Application Requirements

Once you have submitted the business entity authentication, you can apply for a D-U-N-S Number immediately. **You do not need to wait for the authentication to be completed; you can apply for a D-U-N-S Number even while the status is still "Pending Verification."**

4.2 Application Interface

There are two entry points on the Home Page of Portal-HK (as shown in the screenshot below), clicking on either one will take you to the D-U-N-S® Number Application Page.



4.3 Application Steps

Step 1: Read the Introduction to D-U-N-S® Number.

Step 2: Select the Applying Enterprise.

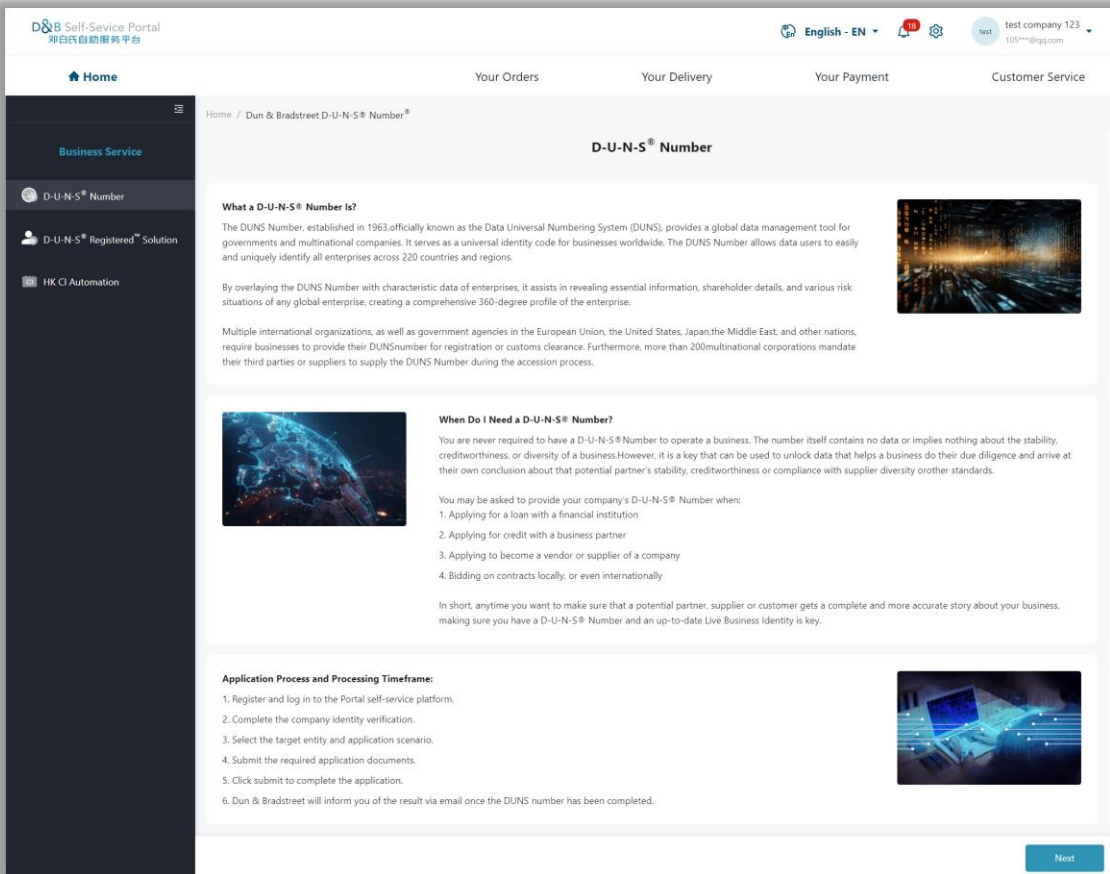
Step 3: Choose the Applying Scenario.

Step 4: Fill out the Application Information.

Step 5: Submit the D-U-N-S® Number Application.

Step 1: Read the Introduction to D-U-N-S® Number:

Exploring further about the usage scenarios and considerations of D-U-N-S® Number will help you better understand the application process and its subsequent use.



The screenshot displays the D&B Self-Service Portal interface. The top navigation bar includes 'Home', 'Your Orders', 'Your Delivery', 'Your Payment', and 'Customer Service'. The main content area is titled 'D-U-N-S® Number' and contains the following sections:

- What a D-U-N-S® Number Is?**

The DUNS Number, established in 1963, officially known as the Data Universal Numbering System (DUNS), provides a global data management tool for governments and multinational companies. It serves as a universal identity code for businesses worldwide. The DUNS Number allows data users to easily and uniquely identify all enterprises across 220 countries and regions.

By overlaying the DUNS Number with characteristic data of enterprises, it assists in revealing essential information, shareholder details, and various risk situations of any global enterprise, creating a comprehensive 360-degree profile of the enterprise.

Multiple international organizations, as well as government agencies in the European Union, the United States, Japan, the Middle East, and other nations, require businesses to provide their DUNS number for registration or customs clearance. Furthermore, more than 200 multinational corporations mandate their third parties or suppliers to supply the DUNS Number during the accession process.
- When Do I Need a D-U-N-S® Number?**

You are never required to have a D-U-N-S® Number to operate a business. The number itself contains no data or implies nothing about the stability, creditworthiness, or diversity of a business. However, it is a key that can be used to unlock data that helps a business do their due diligence and arrive at their own conclusion about that potential partner's stability, creditworthiness or compliance with supplier diversity or other standards.

You may be asked to provide your company's D-U-N-S® Number when:

 1. Applying for a loan with a financial institution
 2. Applying for credit with a business partner
 3. Applying to become a vendor or supplier of a company
 4. Bidding on contracts locally, or even internationally

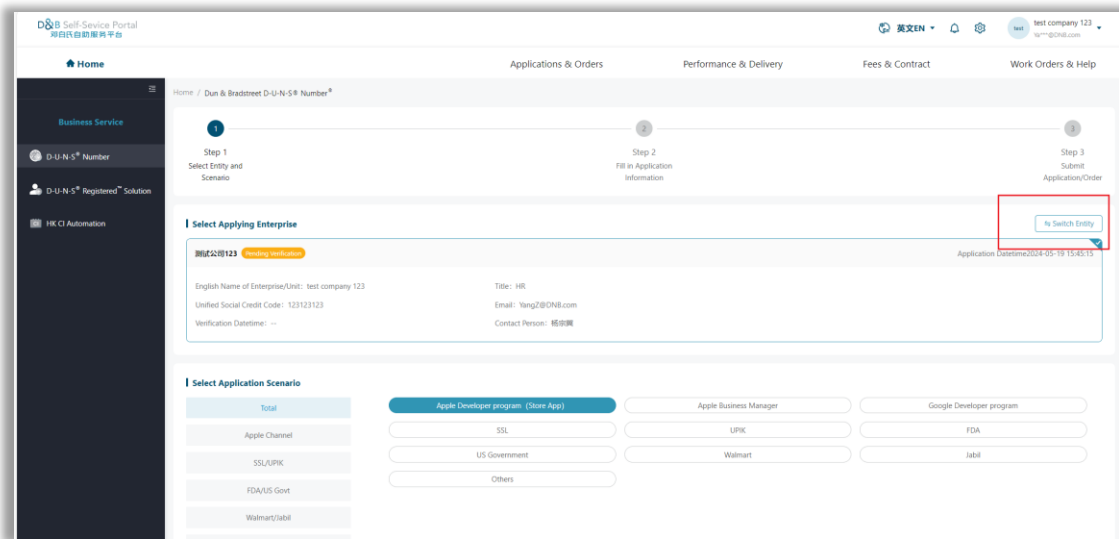
In short, anytime you want to make sure that a potential partner, supplier or customer gets a complete and more accurate story about your business, making sure you have a D-U-N-S® Number and an up-to-date Live Business Identity is key.
- Application Process and Processing Timeframe:**
 1. Register and log in to the Portal self-service platform.
 2. Complete the company identity verification.
 3. Select the target entity and application scenario.
 4. Submit the required application documents.
 5. Click submit to complete the application.
 6. Dun & Bradstreet will inform you of the result via email once the DUNS number has been completed.

The page also features a 'Next' button at the bottom right.

Step 2: Select the Applying Enterprise

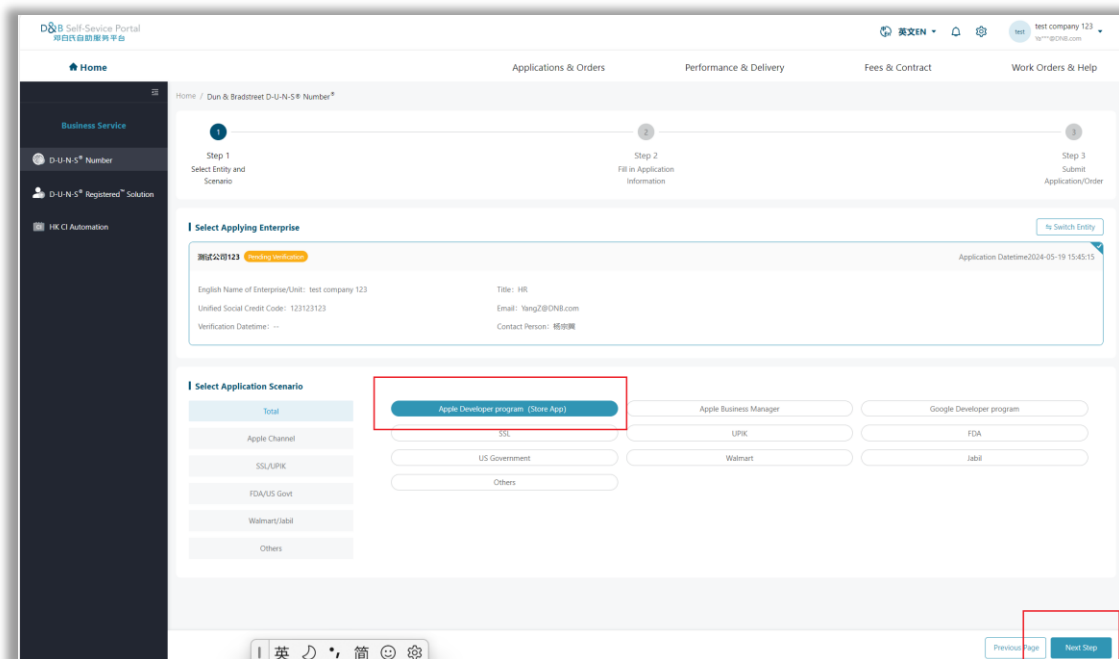
To apply for a D-U-N-S® Number, you need to have an applying entity. If you haven't completed the business entity authentication, you need to first "Add Entity" (please refer to the Add Entity introduction). You can apply for a D-U-N-S® Number even while your entity is in "Pending Verification" status.

If you are applying for a D-U-N-S® Number for another company, please click on "Switch Entity" to change to the desired company.



Step 3: Choose the Applying Scenario

Choose the appropriate channel for inviting D-U-N-S® Number application, then click "Next Step" to proceed to the application information filling page.



Step 4: Fill out the Application Information.

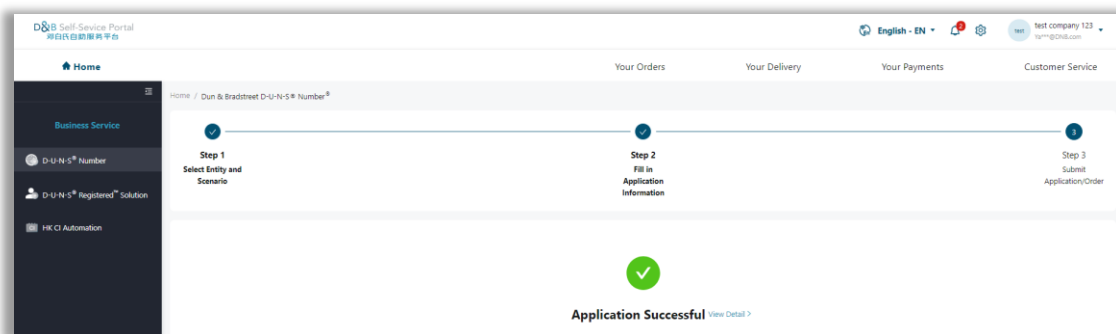
the fields you need to fill in:

- Reason for Application of D-U-N-S® Number:
 - Upload Relevant Proof: Upload any relevant documents or proof to support your application.
 - Select Service Type: If you have time constraints for the application of the D-U-N-S® Number, you can click on "Priority."
- Note 1: The application information provided by the user will be reviewed before generating the D-U-N-S® Number for the applying entity. Please ensure that the information provided is correct. Incorrect information may lead to rejection of the application.
 - Note 2: Different applying scenarios may require different information and application processes.

The screenshot displays the 'D&B Self-Service Portal' interface. The top navigation bar includes 'Home', 'Applications & Orders', 'Performance & Delivery', 'Fees & Contract', and 'Work Orders & Help'. The user is logged in as 'test company 123'. The main content area shows a progress bar with three steps: Step 1 (Completed), Step 2 (Current), and Step 3. The current step is 'Step 2: Fill in Application Information'. Below the progress bar, there are three main sections: 'Fill in Basic Information' with a text input field for the reason for application; 'Upload relevant proof.' with an 'Upload' button and a list of supporting documents; and 'Select Service Type' with two radio buttons: 'Normal Application' and 'Priority (D-U-N-S® Registered™ Solution)'. The 'Priority' option is selected. At the bottom, there are language and accessibility icons, and 'Previous Page' and 'Submit' buttons.

Step 5: Submit the D-U-N-S® Number Application.

After filling in all the aforementioned information, click on "Submit." You will then see the "Application Successful" page.

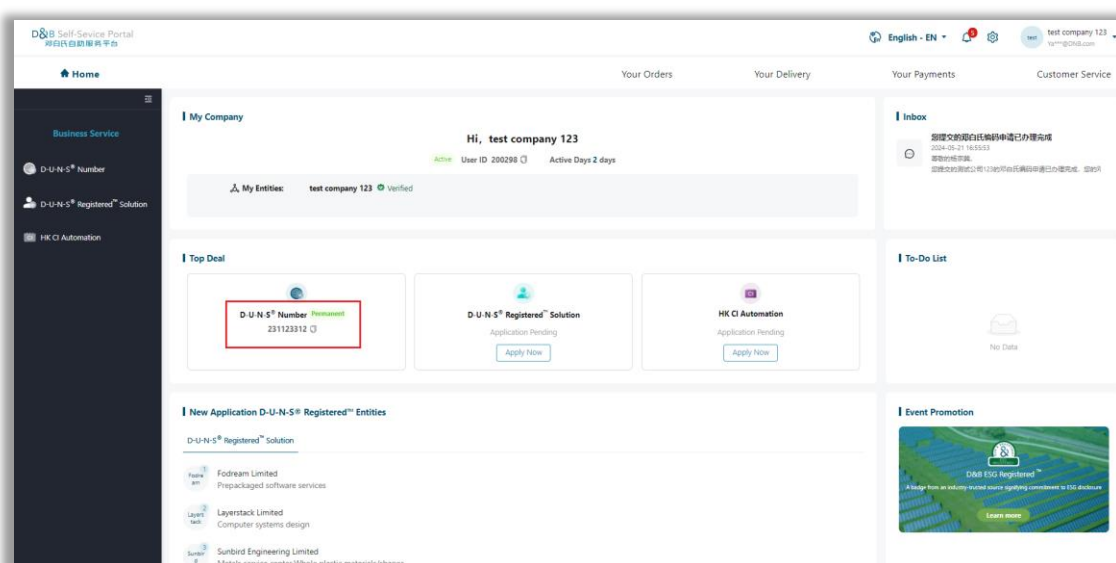


4.4 check the application result

To check the application result, you can navigate to the relevant section or page on the Portal-HK platform. Typically, after submitting your application, you may receive an email notification regarding the status of your application. Additionally, you can log in to your account on the Portal-HK platform to view the application status and any updates.

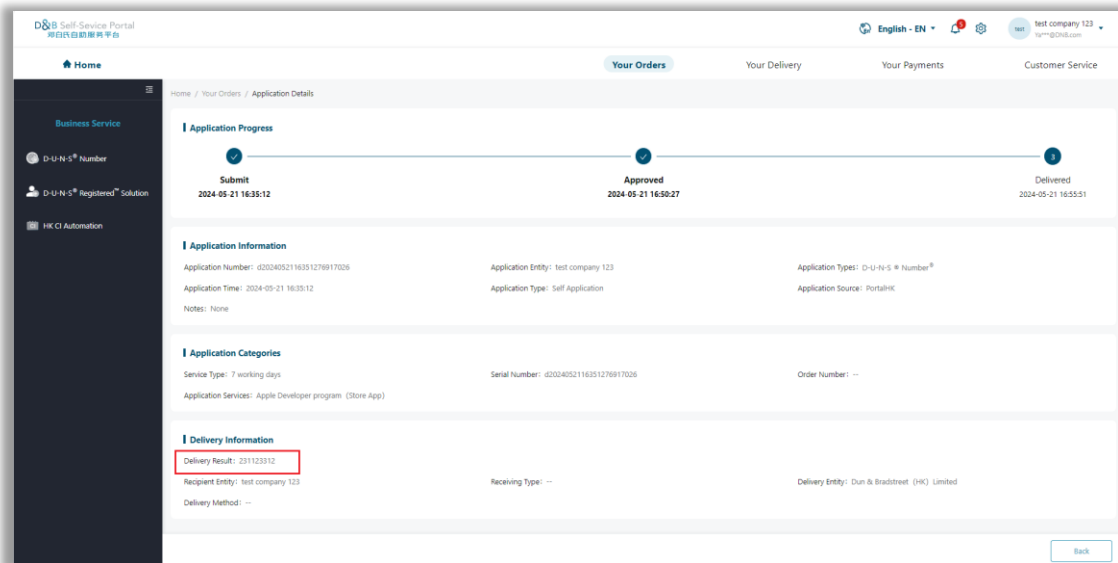
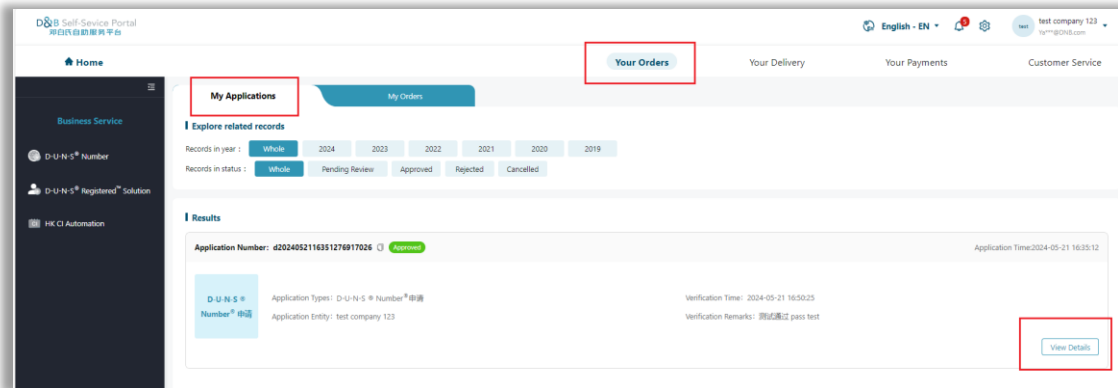
First method to check

From the "Home" page, navigate to the "Top Deal" section, where you can view the DUNS information.



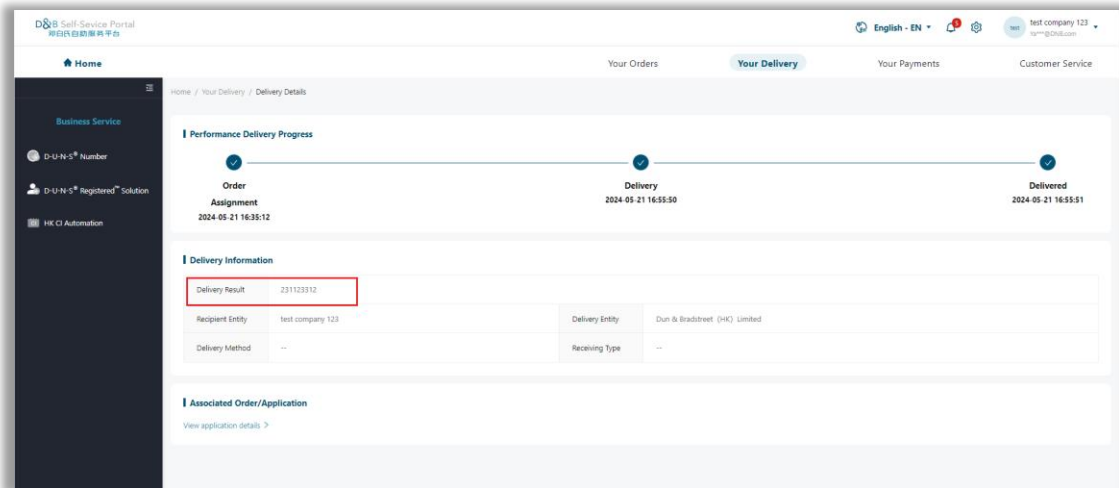
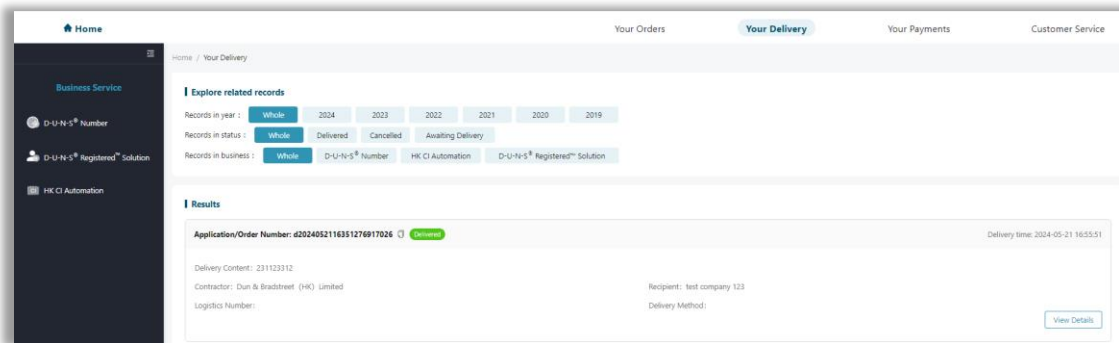
Second method to check

- Navigate to the "Home" page.
- Go to "Your Orders."
- Under "Applications,"
- Find the record for "D-U-N-S ® Number® Application," and click on "View Details."
- In the "Delivery Information" section, you can see the DUNS information under the "Delivery Result" field.



Third method to check

- Go to the "Home" page.
- Navigate to "Your Delivery."
- Under "Results," locate the delivery record for the "D-U-N-S ® Number® Application."
- Click on "View Details" to see the DUNS information.



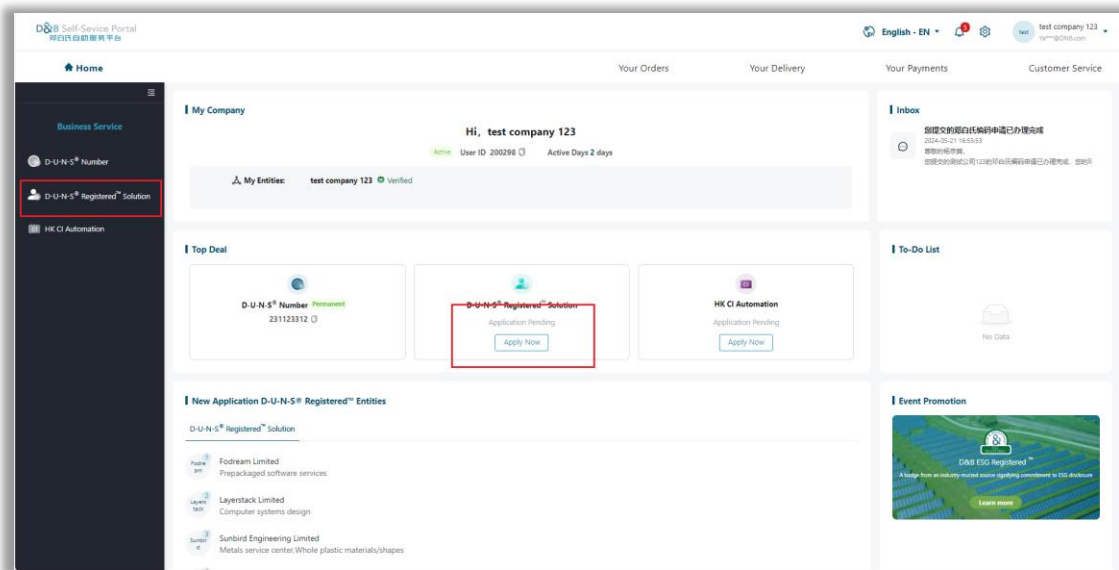
5. D-U-N-S® Registered™ Solution

5.1 Conditions for Ordering

Once the user completes the registration and enters the Home page, they can subscribe to the D-U-N-S® Registered™ Solution without needing to go through the business entity authentication process.

5.2 Ordering Entrance

Home page provides 2 application entry points, as shown in the image below.



5.3 Ordering Steps

Step 1: Read the introduction to D-U-N-S® Registered™ Solution.

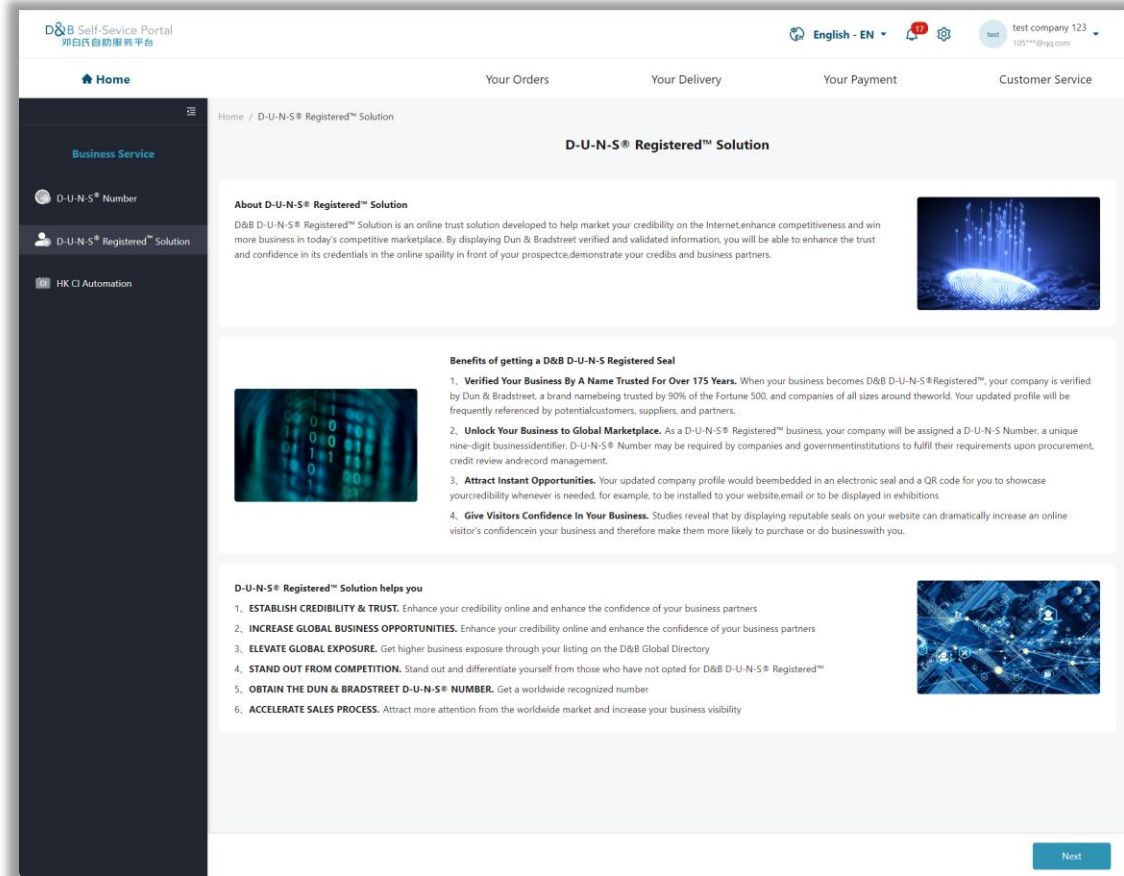
Step 2: Select the Product.

Step 3: Fill out the Contact Information.

Step 4: Make Payment Online.

Step 1: Read the introduction to D-U-N-S® Registered™ Solution.

Understanding more about the usage scenarios and considerations of D-U-N-S® Registered™ Solution will help you better complete the application process and effectively use it afterwards.



Step 2: Select the Product

Choose the desired Product, Service Period, and Delivery Leadtime based on your requirements.

- Note 1: The Payment Amount will be automatically generated based on the product combination chosen by the user. Different combinations will result in different prices.
- Note 2: Working Days refer to the days of the week when business is typically conducted, usually Monday through Friday, excluding weekends and public holidays.

Step 3: Fill out Contact Info:

To facilitate better communication with you, please provide accurate contact information. Ensure the information is correct. After completion, click "Submit" to proceed to the payment process.

- Note 1: You need to agree and check the relevant "Policy" content.

- Note 2: If you require priority delivery of DUNS information after purchase, please add a note in the remarks.

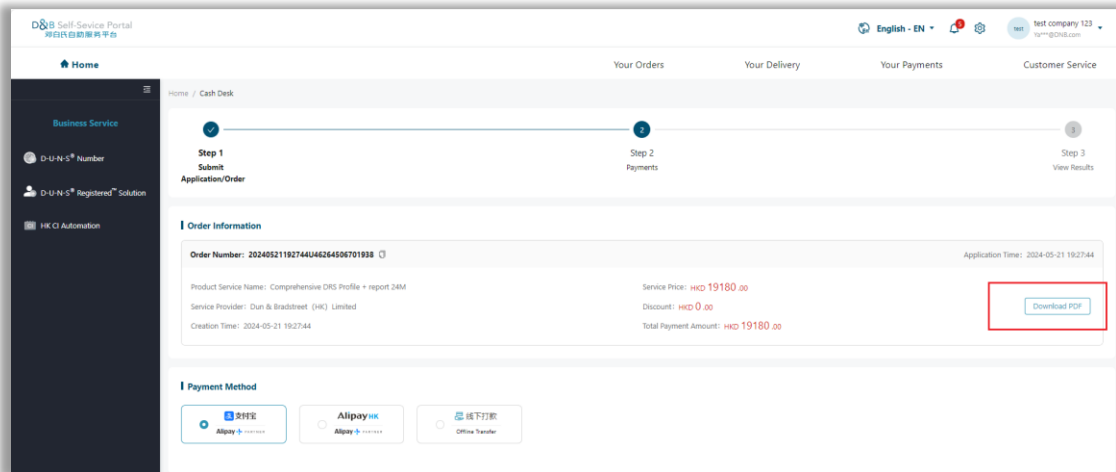
The screenshot displays the D&B Self-Service Portal interface. The top navigation bar includes 'Home', 'Your Orders', 'Your Delivery', 'Your Payment', and 'Customer Service'. The main content area is titled 'D-U-N-S® Registered™ Solution' and shows a 'Select Product' step. The 'Comprehensive Profile' and 'Standard Profile' options are visible, along with a checked 'And D&B Business Information Report'. The 'Service Period' section shows '24 Months' selected. The 'Delivery Leadtime' section shows '8 Working Days' selected. The 'Payment Amount' is listed as 'HKD 19180.00'. The 'Add Contact' section includes fields for 'Company Name', 'Contact Person Name', 'Contact Person Tel', and 'Contact Person email'. The 'Remarks' section has a text input field. The 'Policy' section includes a radio button for 'I have read and agree to the online General Terms and Conditions and Product terms.' and a disclaimer text.

Step 4: Make Payment Online

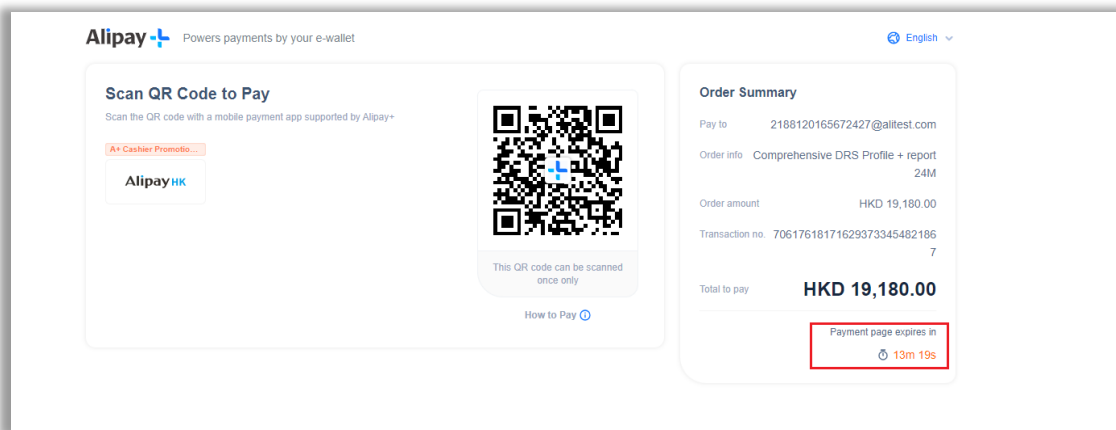
Confirm the product order and payment information. Choose the preferred payment method, then click "Next" to proceed to the payment page. Complete the payment by scanning the QR code.

- Online Payment: Provide payment details online and complete the transaction using your preferred payment method.

- **Offline Payment:** If you prefer to make a payment offline, details for offline payment will be provided. You can transfer the payment to the designated account. Subsequently, a staff member will communicate with you to confirm the service details.
- **Download PDF:** If you need to request reimbursement from the company, click on "Download PDF" to download the order details.



- **Note 1: Payment Timeout:** 15 minutes (Once users click on the corresponding payment method and enter the payment page, they have 14 minutes to complete the payment. Otherwise, the payment will expire.)



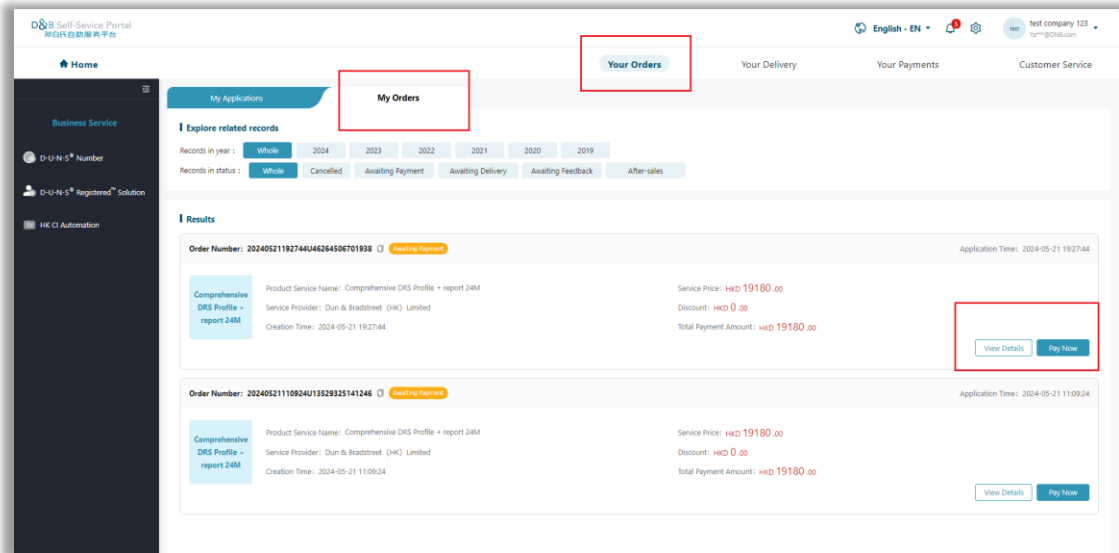
- **Note 2: Unpaid orders** will be retained for 1 month. If a user orders a product but cannot make the payment immediately, exiting the order page will retain the order. Users can log in next time to continue the payment process.

5.4 To view unpaid orders

Access: "Home" -> "Your Orders" -> "Orders"

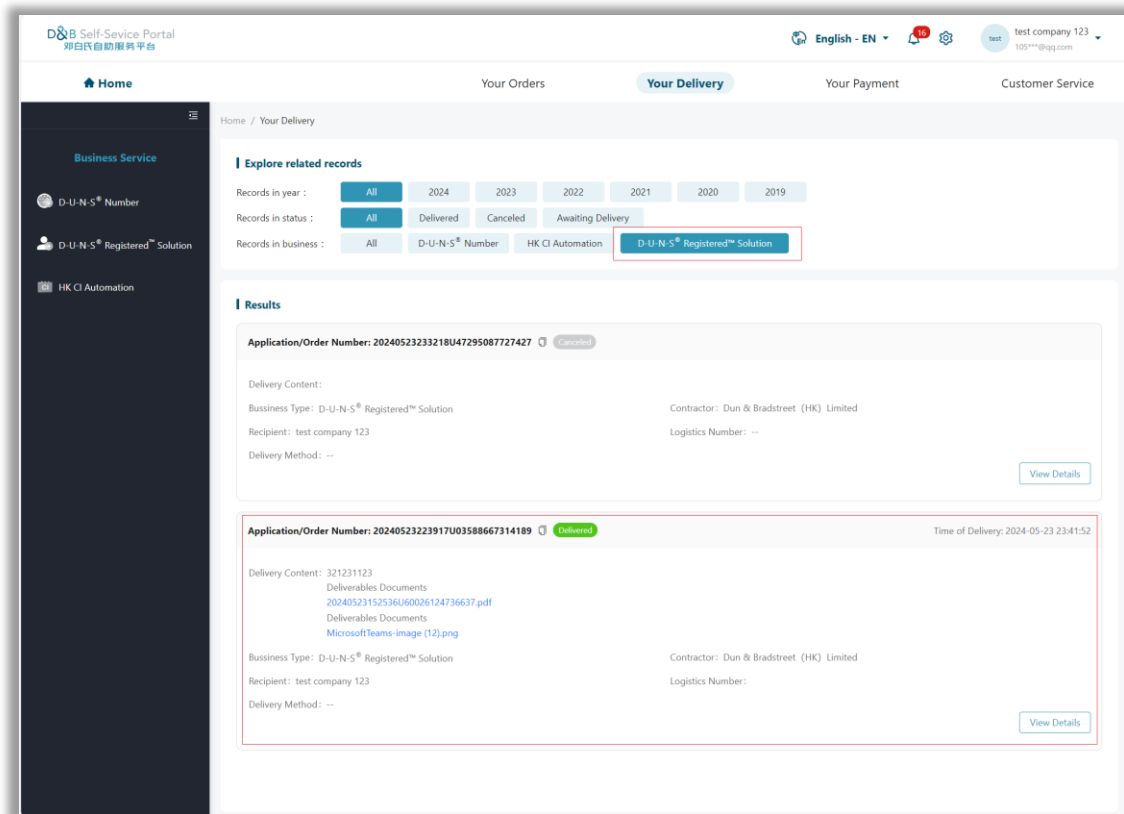
You can view unpaid orders (orders pending payment) here. Unpaid orders are valid for 1 month.

Click on "Pay Now" to proceed with the payment.



5.5 To view deliveries

Click on "Your Delivery" and filter for "D-U-N-S® Registered™ Solution" to view completed deliveries.



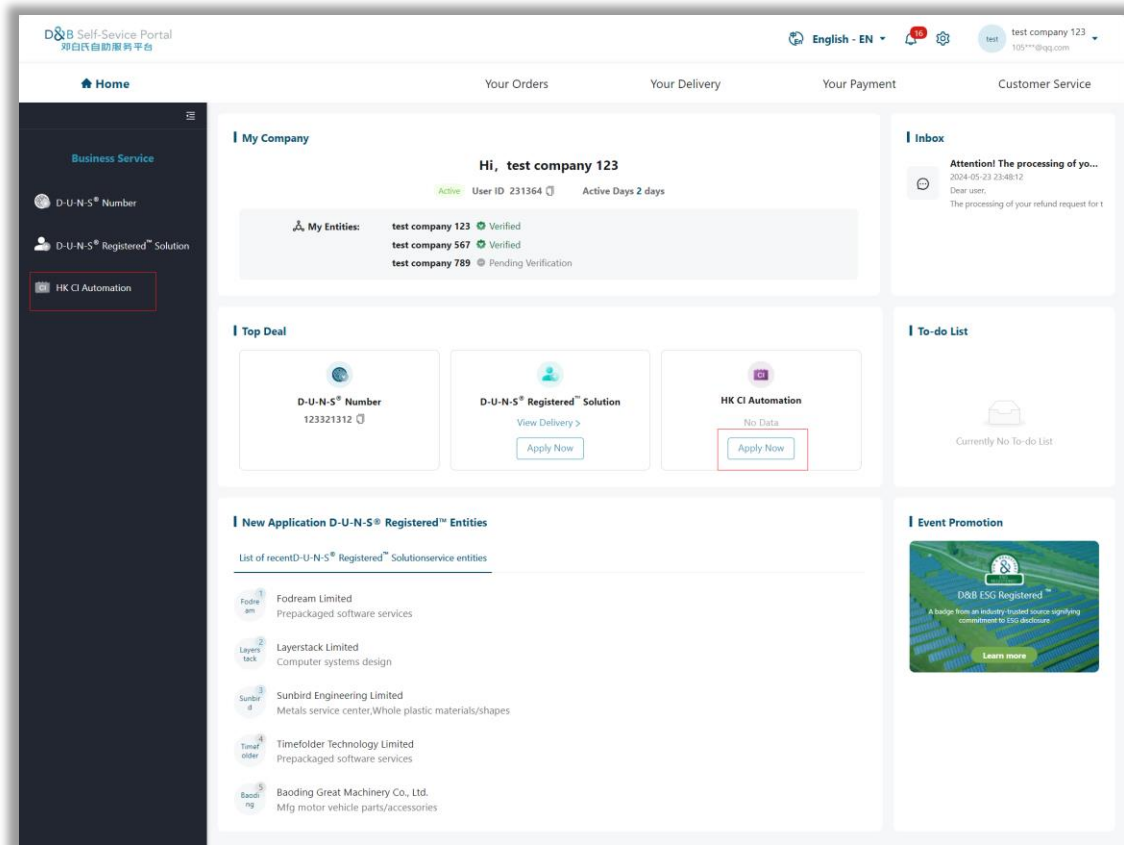
6. HK CI Automation

6.1 Conditions for Ordering

Once the user completes registration and enters the Home page, they can subscribe to the HK CI Automation without needing to go through the business entity authentication process.

6.2 Ordering Entrance

The Home page provides two application entry points, as shown in the image below.



6.3 Ordering Steps

Step 1: Read the introduction to HK CI Automation.

Step 2: Select Service Type and Find Target Entity.

Step 3: Add Contact and agree to the Policy.

Step 4: Choose Payment Method and make payment.

Step 1: Read the introduction to HK CI Automation.

Read the introduction to HK CI Automation to understand more about its usage scenarios and considerations. This will help you better complete the application process and effectively use it afterwards.

D&B Self-Service Portal
邓白氏自助服务平台

English - EN 17 test company 123
105***@qq.com


Home Your Orders Your Delivery Your Payment Customer Service

Home / HK CI Automation

HK CI Automation


About Dun & Bradstreet Hong Kong CI Automation

The Dun & Bradstreet Hong Kong CI Automation is a risk assessment report produced by Dun & Bradstreet for Hong Kong companies. It is used to help users evaluate and understand the overall business and risk profile of the company, enabling them to better manage credit risk in financial management or supplier risk in procurement. The report covers data such as basic business information, registration details, risk scores, operational, financial, and public records of the target company.



Application Scenarios

- Routine Financial Risk Management.** Financial personnel or credit control personnel assess the credit risk of customers to prevent unrecoverable accounts receivable and bad debt situations.
- Routine Supplier Risk Management.** Procurement personnel evaluate the operational risks of suppliers during admission or annual audits to prevent supply chain disruptions.
- Compliance Management.** Compliance or risk control personnel conduct screenings on relevant counter parties of the company. The screenings encompass a range of information, including national sanction lists, negative media coverage, administrative penalties, legal litigation, and other negative information. The scope of query typically covers the company itself and its direct equity affiliates.




Core Value of Product and Service

Dun & Bradstreet's data analysis capabilities: Based on predictive scoring, it predicts the stability of an enterprise's operations. Global data correlation capabilities: In compliance screening, it conducts screenings based on global data, making the query scope more comprehensive.


Application Process and Processing Cycle:

- Register and log in to the self-service platform;
- Select the target enterprise and report type you want to understand, submit the order, and make an online payment;
- After payment, depending on the selected report type, the report will be automatically delivered online and the user will be notified by email. Please check the notification email and report.



Important Notice

- Dun & Bradstreet does not grant authorization to any company or individual in mainland China to act as its agent or representative for Hong Kong Registration Services.
- To ensure the security and integrity of your business data, please use Dun & Bradstreet's official channels to apply for Dun & Bradstreet Hong Kong Registration Services. Applying through any other channels may put your business data at risk of leakage or potential fraud.

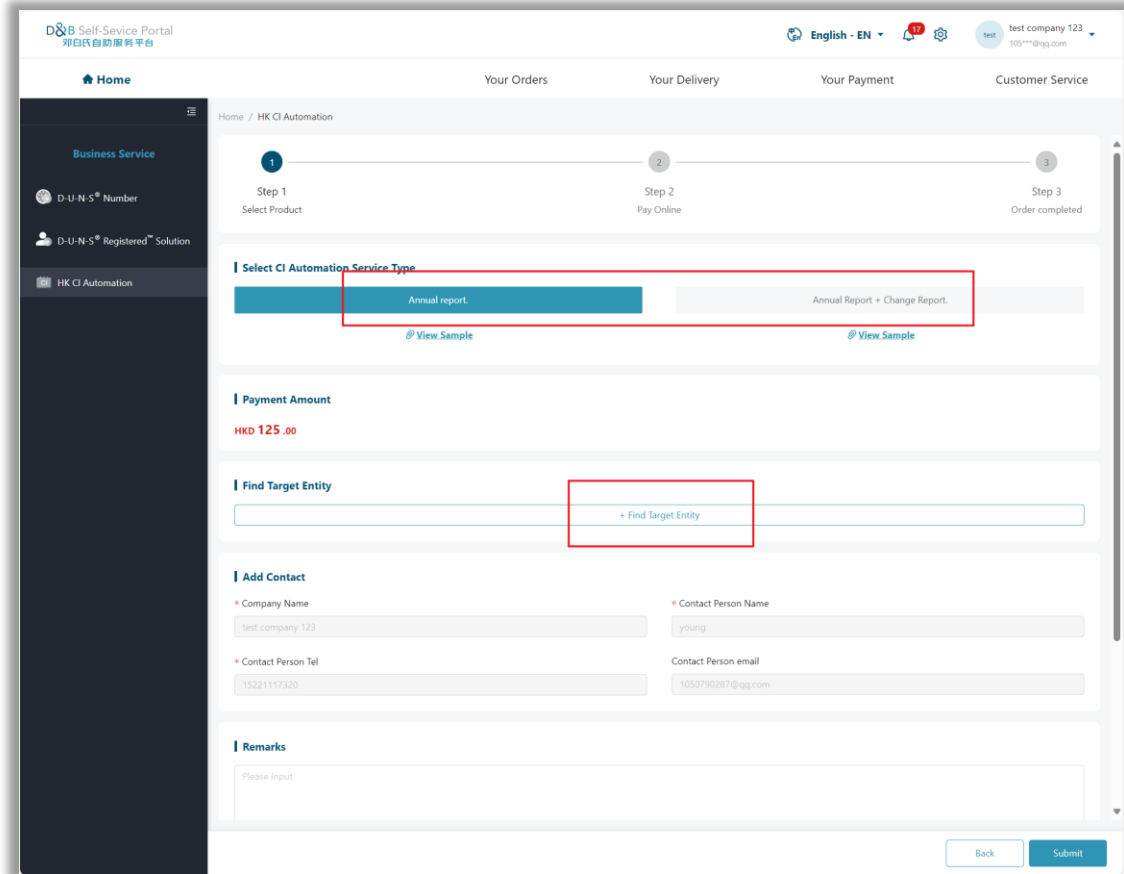


Next

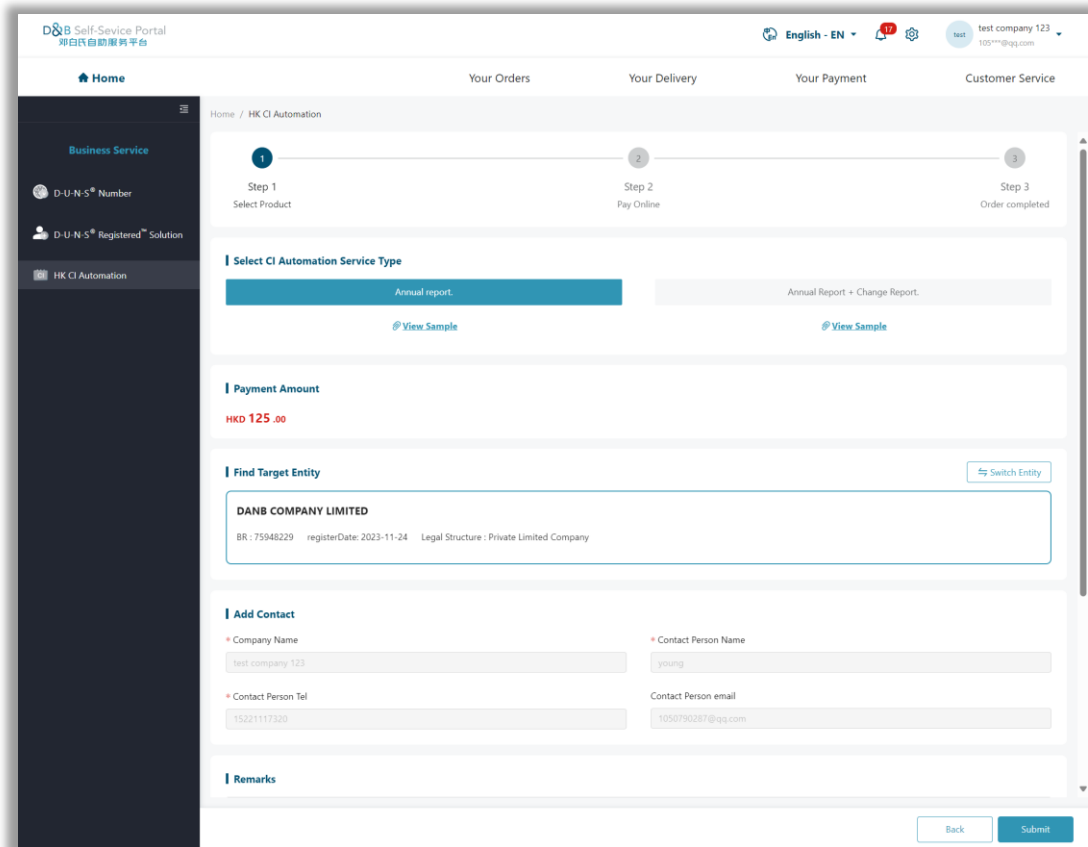
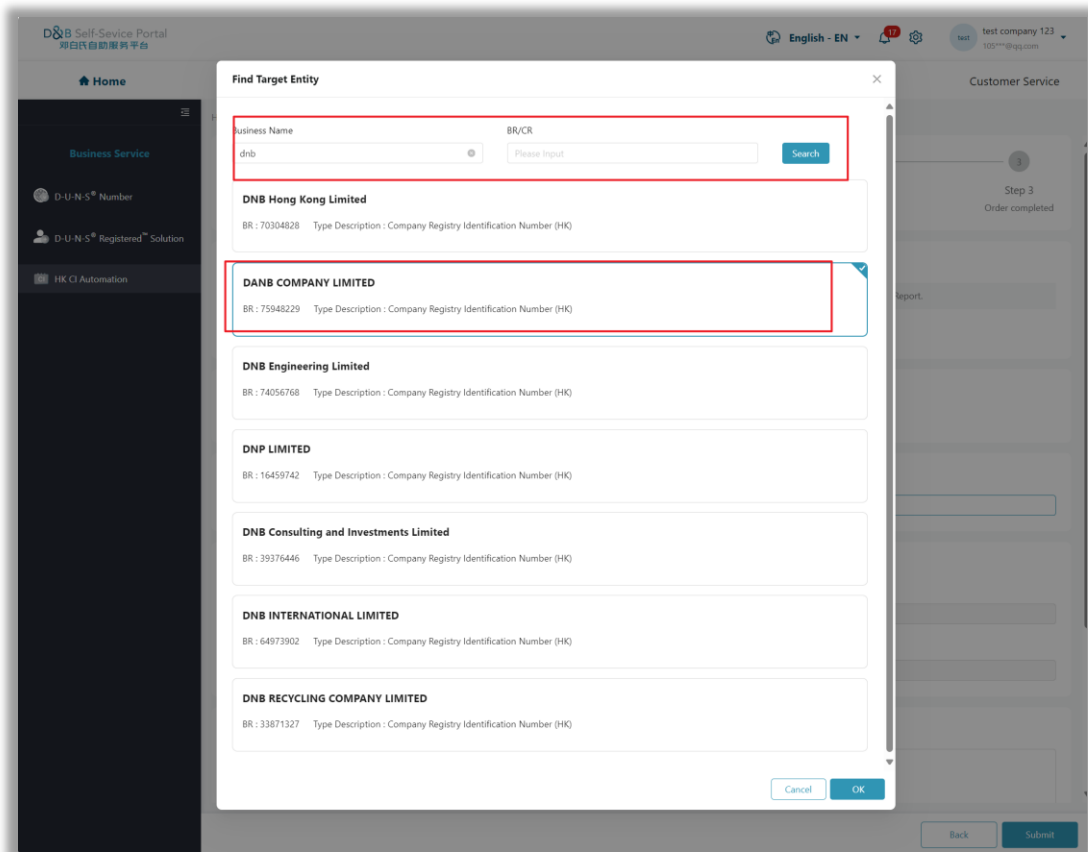
Step 2: Select Service Type and Find Target Entity.

Offering two different types of services:

Annual Report and Annual Report + Change Report. The prices for these two services are different. You can view the specific prices under "Payment Amount" below.



- a) Click on "Find Target Entity" to open a new page. Enter the "Business Name" or "BR/CR" and click "Search."
- b) In the search list, locate the target company. Select the target company and click "OK."



Step 3: Add Contact and agree to the Policy.

Fill out the relevant contact information to facilitate better communication with you. Please ensure that the information provided is correct.

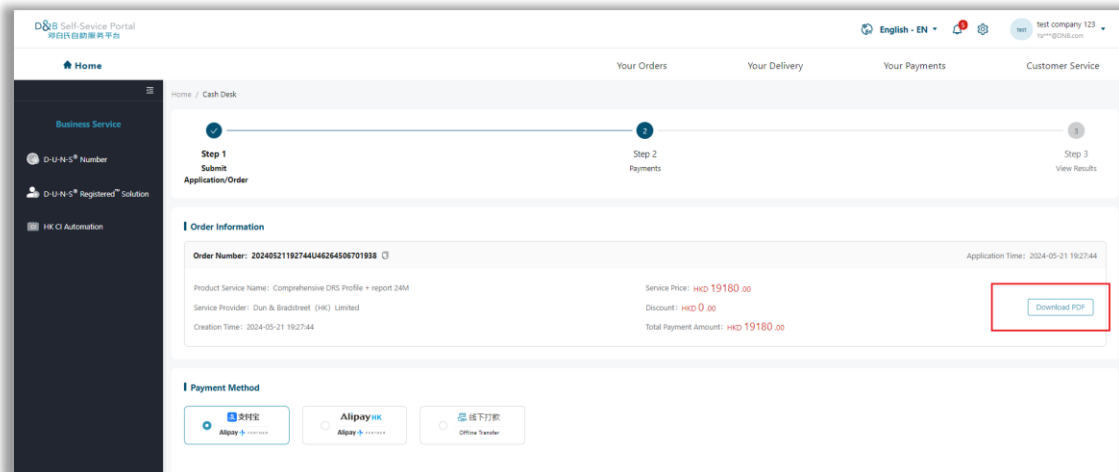
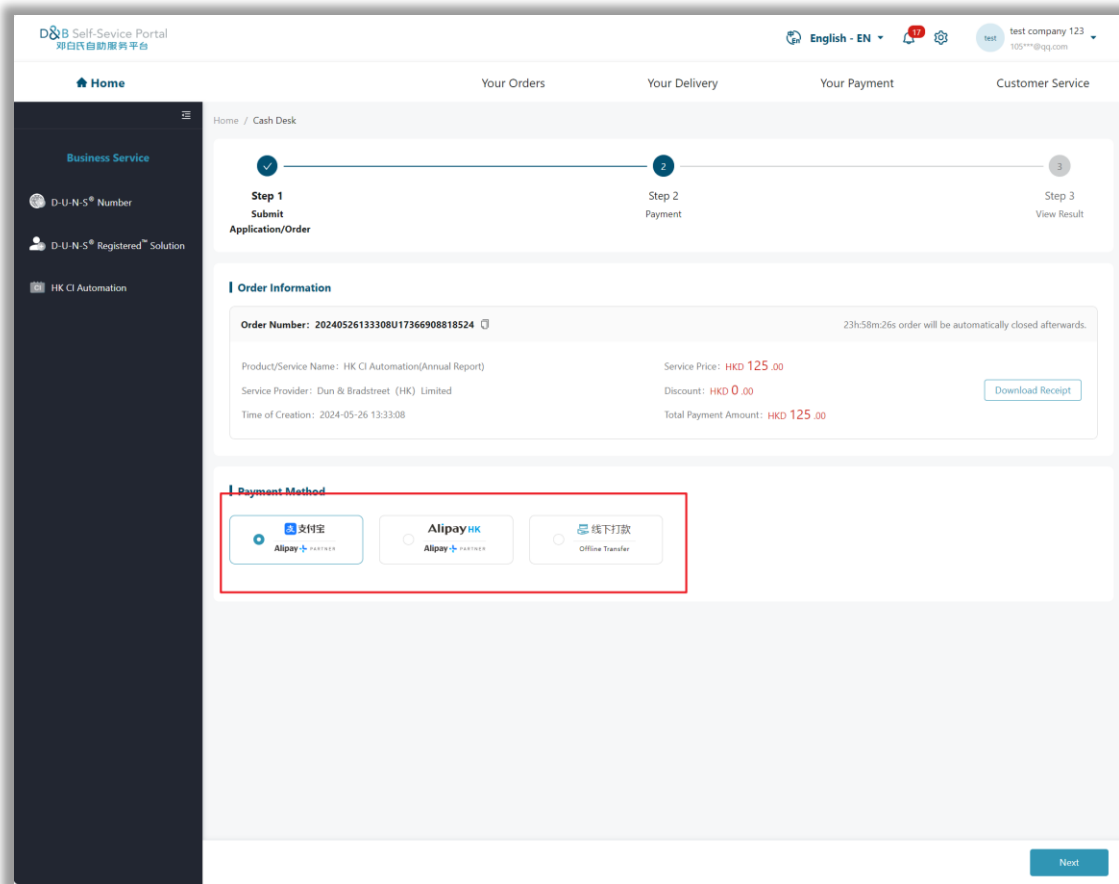
Check the contents of the Policy and agree to them. After completion, click "Submit" to proceed to the payment process.

The screenshot displays the D&B Self-Service Portal interface. The top navigation bar includes 'Home', 'Your Orders', 'Your Delivery', 'Your Payment', and 'Customer Service'. The main content area is titled 'Home / HK CI Automation' and shows a total amount of 'HKD 125.00'. Below this, there is a 'Find Target Entity' section with a search box containing 'DANB COMPANY LIMITED' and a 'Switch Entity' button. The 'Add Contact' section is highlighted with a red box and contains the following fields: 'Company Name' (test company 123), 'Contact Person Name' (young), 'Contact Person Tel' (15221117320), and 'Contact Person Email' (1050790287@qq.com). Below the 'Add Contact' section is a 'Remarks' section with a text input field. The 'Policy' section is also highlighted with a red box and contains a radio button for 'I have read and agree to the online General Terms and Conditions and Product terms.' Below the policy section is a disclaimer: 'I hereby undertake that I am duly authorised to perform all acts on behalf of The Company (hereinafter referred to as Institution) in using the D&B User Portal HK and place orders on the D&B User Portal HK. All of the actions undertaken by me on behalf of the Institution shall be deemed to have the same legal effect as the actions of the Institution. If the Company Information is incorrect, D&B reserves the right to either: (i) terminate the Order and refund your payment; or (ii) require to re-sign an offline order under the correct Company Information.' At the bottom right, there are 'Back' and 'Submit' buttons.

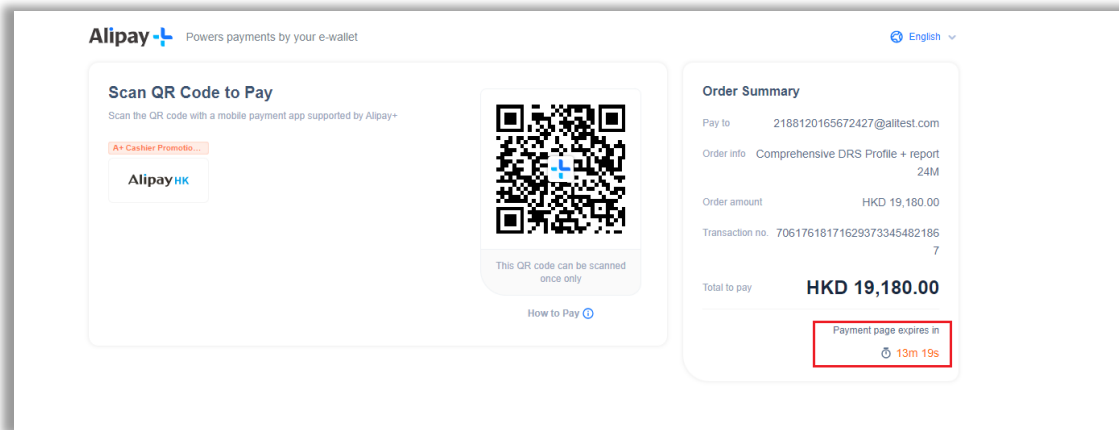
Step 4: Choose Payment Method and make payment.

Confirm the product order and payment information. Select the preferred payment method and click "Next" to proceed to the payment page. Complete the payment by scanning the QR code.

- Note 1: Offline payment is supported. Users can transfer the payment to the provided account, and a staff member will communicate with you to confirm the service details.
- Note 2: Click on "Download Receipt" to obtain the order for this payment



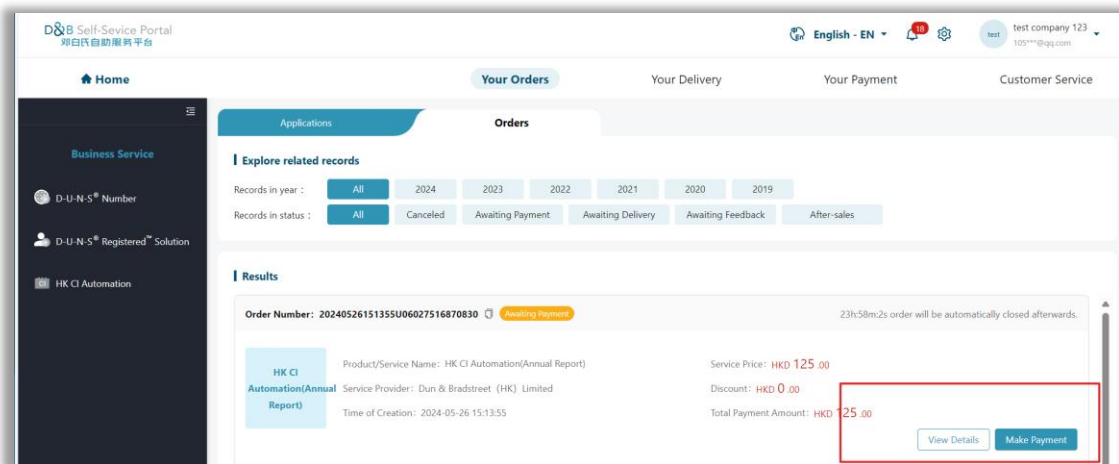
- Note 3: Payment Timeout: 15 minutes (Once users click on the corresponding payment method and enter the payment page, they have 14 minutes to complete the payment. Otherwise, the payment will expire.)



6.4 To view unpaid orders

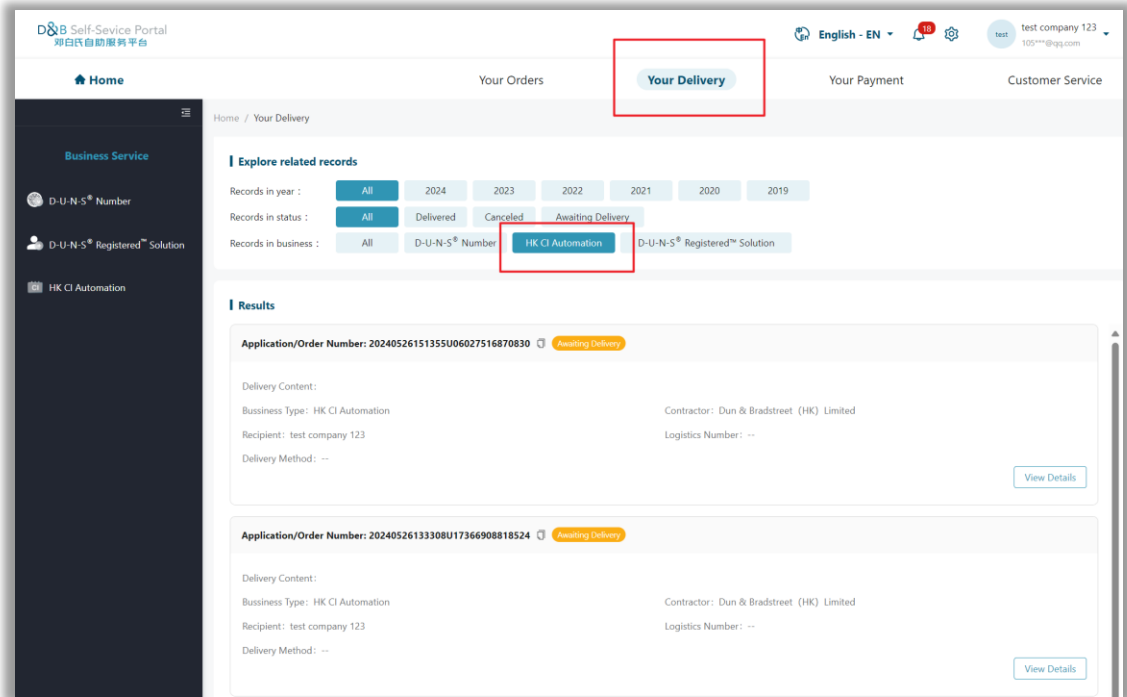
Unpaid orders will be retained for 1 month. If a user orders a product but cannot make the payment immediately, exiting the order page will retain the order. Users can log in next time to continue the payment process.

Entrance: "Home" -> "Your Orders" -> "Orders" allows you to view unpaid orders. Unpaid orders are valid for 1 month. Click on "Make Payment" to continue with the payment



6.5 To view deliveries

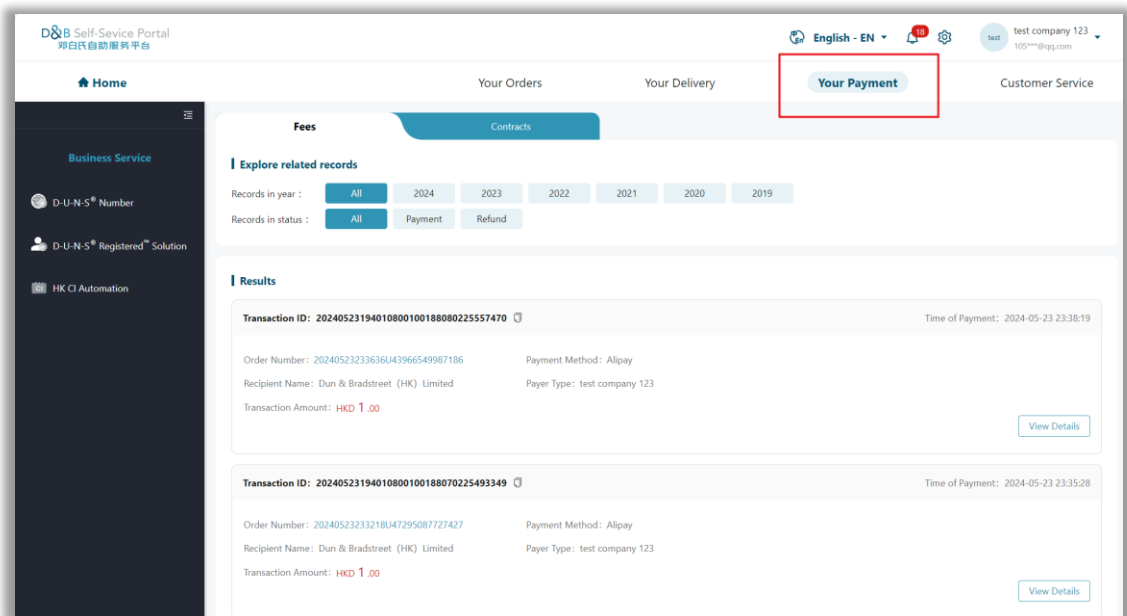
Clicking on "Your Delivery" and filtering for "HK CI Automation" allows you to view completed deliveries.



7. Others

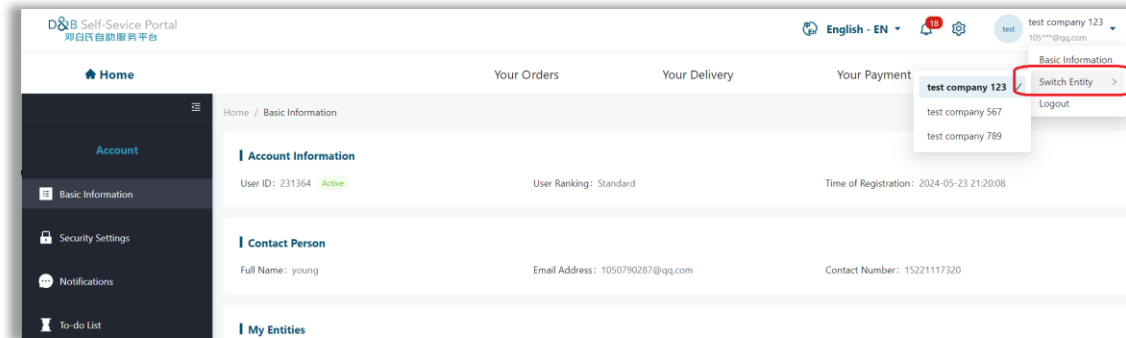
7.1 Your Payment

You can view all completed orders with their corresponding payment status.



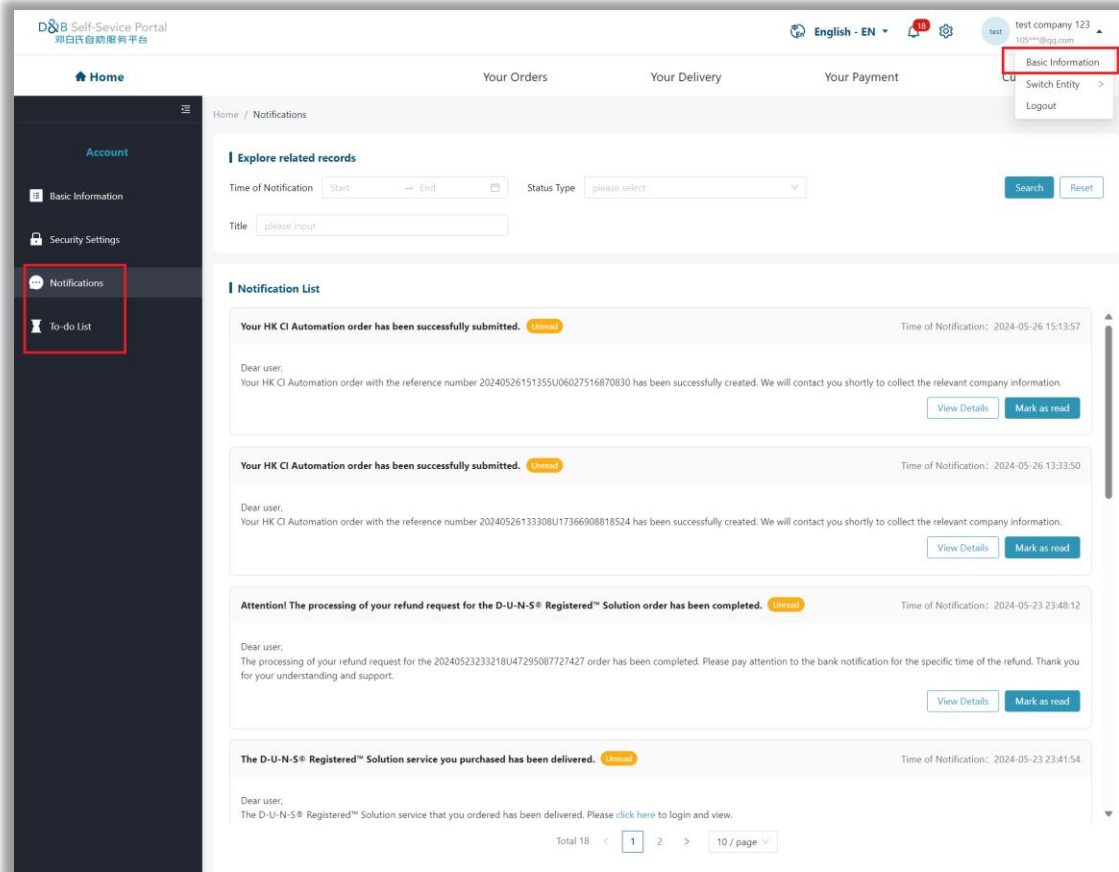
7.2 Switch Entity

By clicking on the User module at the top right corner of the Home Page and then selecting the Switch Entity option from the dropdown menu, you can switch the current enterprise.



7.3 Notifications & To-Do List

Clicking on "Basic Information" under the "User" section at the top right corner of the platform allows you to select "Notification" and "To-Do List" from the left menu to view relevant content.



Security Settings

Using this part can change user account's Password

