

Updating Your Portfolio and Investment Data on CB Insights

A quick start guide to the CB Insights Editor

CB Insights is one way to help you attract co-investors and top-notch deal flows.

Whenever we feature companies or rank investors in this newsletter (now 135k subscribers) or on our research blog (1M+ visitors) or share via Twitter (20k followers), we get a lot of emails from companies and investment firms asking how they can be featured.

Updating your data will ensure we have the latest, greatest info about you when we do our research briefs.

In this tutorial, we will walk you through how to use the Editor to create and edit portfolio and investment data to your profile. We'll walk you through:

- Logging in
- Viewing your portfolio company's general information
- Viewing your portfolio company's funding information
- Editing a company's basic information
- Editing a company's funding information

Let's get started.

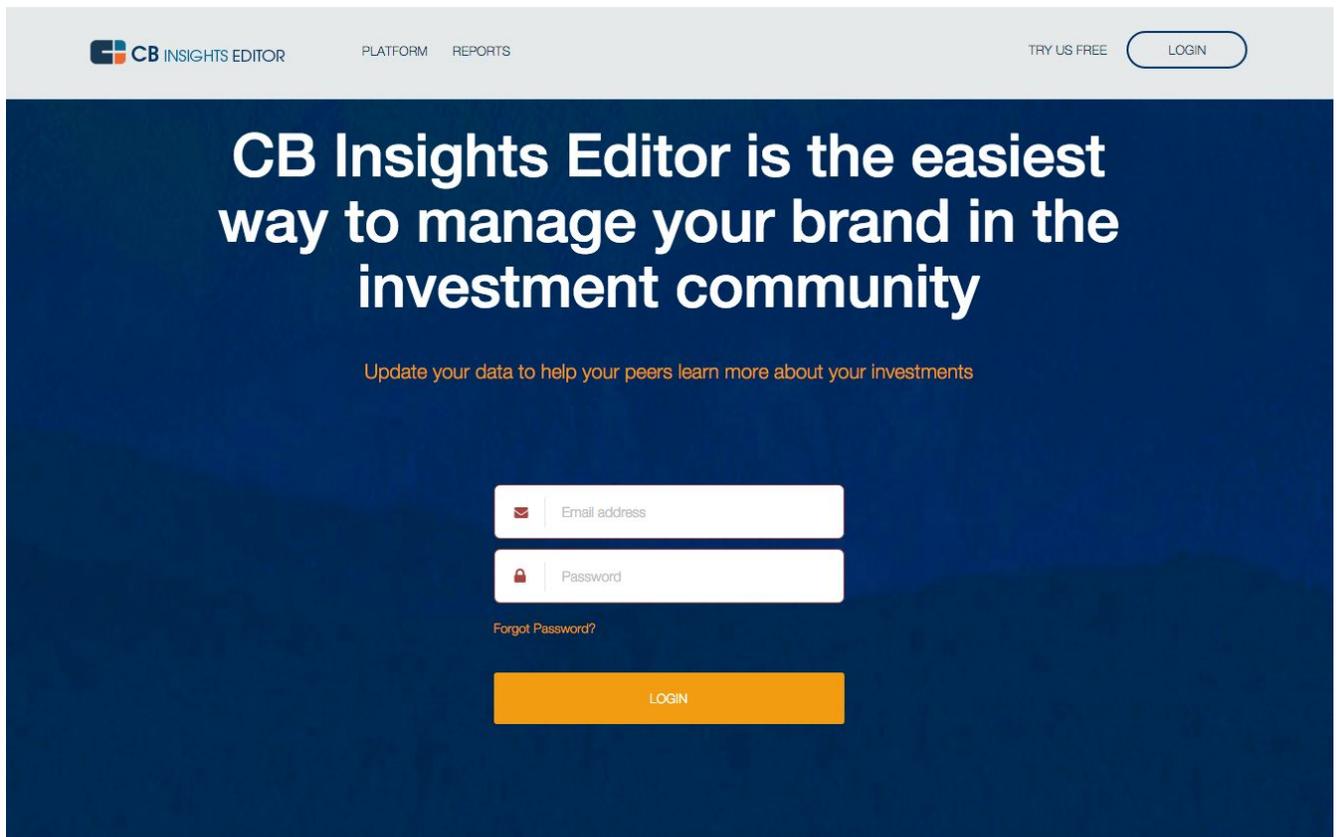
To start, we will illustrate this by using Fred Wilson of Union Square Ventures.



Step 1: Login

- Fred visits the CB Insights editor at <https://editor.cbinsights.com/login>
- He would use his existing credentials or set up an account with his business email address

Note: If you are setting up a new account, you will need to validate your email.



CB INSIGHTS EDITOR PLATFORM REPORTS TRY US FREE LOGIN

CB Insights Editor is the easiest way to manage your brand in the investment community

Update your data to help your peers learn more about your investments

Email address

Password

[Forgot Password?](#)

LOGIN

To edit your profile, sign up for a free account

[SIGN UP FOR A FREE ACCOUNT](#)

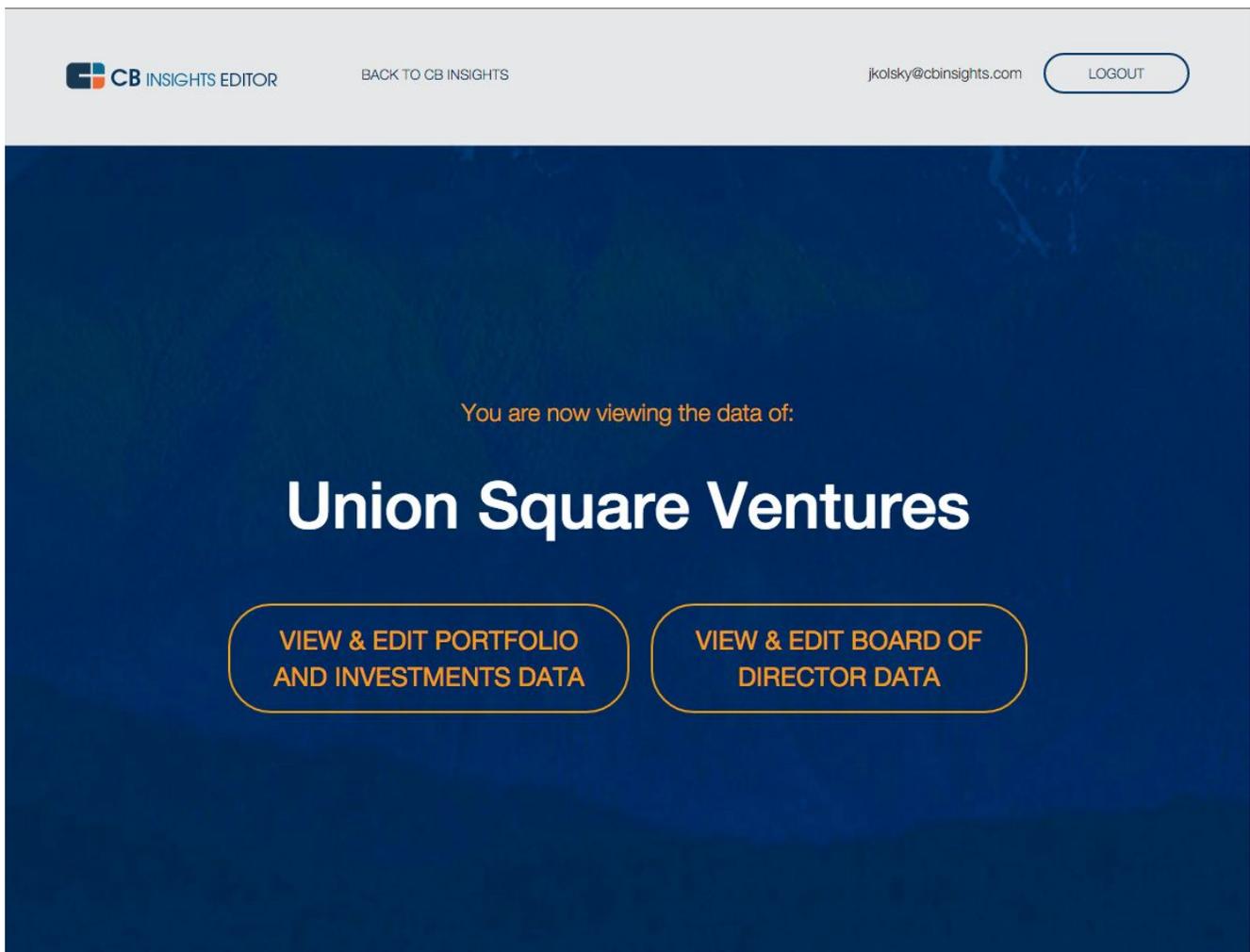
Step 1B: Pick your firm name (This will not apply to most users)

Once logged in, most users will be automatically matched to an investor profile by matching their email domain with a firm's website. If you're automatically matched to a profile, you'll go directly to step 2.

If you are not auto-matched, you can search for an investor profile by typing in the name of the investor and clicking "search".

Note: Once you are matched to a profile, you will be locked into that firm's profile. If you are a marketing or PR manager and need access to multiple profiles, please send us an email at data@cbinsights.com with the subject line "Editor" and include the VC firm profiles you need access to. If you're outside of the requested organization, we will require a confirmation from the VC firm that you have access to edit their profiles. Please copy someone from the firm on the email for confirmation.

If you are unable to find your firm name in our database, please contact data@cbinsights.com.



The screenshot shows the CB Insights Editor interface. At the top, there is a navigation bar with the CB Insights Editor logo on the left, a "BACK TO CB INSIGHTS" link in the center, and the user's email "jkolsky@cbinsights.com" and a "LOGOUT" button on the right. The main content area has a dark blue background with a subtle pattern. It features the text "You are now viewing the data of:" in orange, followed by the firm name "Union Square Ventures" in large white font. Below the firm name are two orange buttons with white text: "VIEW & EDIT PORTFOLIO AND INVESTMENTS DATA" and "VIEW & EDIT BOARD OF DIRECTOR DATA".

Step 2: Review Portfolio and Investments Data

After clicking “View & Edit Portfolio and Investments Data”, Fred will be able to see Union Square Ventures’ portfolio. He will be able to view all of the companies USV has invested in and will have the ability to add a new portfolio company and edit existing data, including basic company information and funding information.

- **Want to see funding information for a portfolio company?** To show the fundings for a certain company, click the “+” to the left of the company name to expand that data.

From here Fred can review the date, round type, amount, valuation, and participating investors. Fred will also be able to see if his firm, Union Square Ventures, have participated in the funding round via the “In Round” column.

- **Is the data shown incorrect?** Click the “Edit” button to the right side of the page to edit a company’s funding and basic information.
- **Know exactly which company you’re looking to review?** Use the search bar on the right hand side to filter for the company you’re looking for.
- **Don’t see the company you’re looking for in your portfolio?** Click the “Add a Portfolio Company” button located on the top left side of the page. Start typing in the name of the company.

A drop down will appear with the companies that already exist in the CB Insights database. Selecting a company from the dropdown will populate the form with the information we have in our database. Once you click submit, click on the “Fundings” tab located at the top left side of the page and edit the funding rounds.

If the company you’d like to add is not listed here, select “Add new company” and enter the company’s general information. Once you click submit, click on the “Fundings” tab located at the top left side of the page and enter the funding rounds.

- **Want to sort the table?** The table of portfolio companies can be sorted by company name, URL, last round raised, and date of last round raised. Simply click the up and down tick marks located to the left of the column name in the header.

Union Square Ventures: Portfolio

Portfolio and Investments Data

Board of Director Data

+ Add new portfolio company

Search for company

Clear

SHOW FUNDINGS	COMPANY	URL	CITY	STATE	COUNTRY	LAST ROUND	ROUND DATE	ACTIONS
+	Zemanta	zemanta.com	New York	New York	United States	Series C	1/22/2016	Edit
+	SideCar Technologies	side.cr	San Francisco	California	United States	Asset Sale	1/19/2016	Edit
+	Foursquare	foursquare.com	New York	New York	United States	Series E	1/15/2016	Edit
+	Soundcloud	soundcloud.com	Berlin		Germany	Debt	1/11/2016	Edit
+	C2FO	c2fo.com	Shawnee Mission	Kansas	United States	Series E - II	1/6/2016	Edit
+	Heyzap	heyzap.com	San Francisco	California	United States	Acquired	12/23/2015	Edit
+	CrowdRise	crowdrise.com	Los Angeles	California	United States	Series A - II	12/21/2015	Edit
+	Koko	itskoko.com	New York	New York	United States	Seed VC	12/16/2015	Edit
+	SimScale	simscale.de	Munich		Germany	Series A	12/2/2015	Edit
+	Quizlet	quizlet.com	San Francisco	California	United States	Series A	11/23/2015	Edit
+	CircleUp	circleup.com	San Francisco	California	United States	Series C	11/11/2015	Edit
+	Auxmoney	auxmoney.com	Dusseldorf		Germany	Line of Credit	10/21/2015	Edit
+	Clue	helloclue.com	Berlin		Germany	Series A	10/9/2015	Edit
+	YouNow	younow.com	New York	New York	United States	Series C	10/5/2015	Edit

Step 3: Edit Company Information and Funding Data

After reviewing a company’s basic and funding information, Fred has the option to make changes to this data.

To edit the company’s basic information, Fred will click the edit button located below the “Actions” column.

To edit the company’s funding information, Fred will click the “+” to the left of the company name to expand that data. On this expanded table, Fred will click the “Edit” button located in the header of that orange table.

Union Square Ventures: Portfolio

Portfolio and Investments Data

Board of Director Data

+ Add new portfolio company

Search for company

Clear

SHOW FUNDINGS	COMPANY	URL	CITY	STATE	COUNTRY	LAST ROUND	ROUND DATE	ACTIONS
-	Zemanta	zemanta.com	New York	New York	United States	Series C	1/22/2016	
IN ROUND	DATE	ROUND	AMOUNT	VALUATION	INVESTORS			
<input checked="" type="checkbox"/>	01/22/2016	Series C	\$3.23M		Eden Ventures, Union Square Ventures			View all
<input checked="" type="checkbox"/>	11/05/2013	Series B	\$2M		Social Starts, Union Square Ventures			View all
<input checked="" type="checkbox"/>	11/19/2010	Series A	\$3M		Eden Ventures, Union Square Ventures			View all
<input checked="" type="checkbox"/>	09/19/2008	Seed VC	\$0.75M		Eden Ventures, Union Square Ventures			View all
	06/24/2008	Seed	\$1.5M		The Accelerator Group			View all
	09/21/2007	Angel	\$0.1M		Seedcamp			View all
+	SideCar Technologies	side.cr	San Francisco	California	United States	Asset Sale	1/19/2016	
+	Foursquare	foursquare.com	New York	New York	United States	Series E	1/15/2016	
+	Soundcloud	soundcloud.com	Berlin		Germany	Debt	1/11/2016	

Step 3A: Edit your Basic Company Information

Fred would like to update Zemanta’s address. After clicking “Edit” below the “Actions” column, Fred will input the new address and click “Submit” located at the bottom right side of the page.

[Back to Portfolio](#)

Zemanta

[Info](#) [Fundings](#)

Company Name Zemanta	Address 1 33 West 17th Street	Year Founded
Website URL zemanta.com	Address 2 	Description Zemanta develops audience development tools which are available through its editorial and content discovery networks. Zemanta recommends content to diverse network of engaged communities and brings new readers to sites. Publishers use Zemanta's technology, who range from Forbes.com and 9to5mac.com, down to tens of thousands of blogs on WordPress.com and Typepad.com.
Email info@zemanta.com	State New York	
Phone 503-766-3622	City New York	
Country United States	Postal Code 10012	
<input type="button" value="Submit"/>		

You currently have access to **Union Square Ventures**. If you need to edit another profile, please email data@cbinsights.com.

[What is the Editor?](#)

Step 3B: Edit your Funding Information

Next, Fred has a lead investor he's like to highlight in Zemanta's most recent funding round. Fred will click on the "Fundings" tab located at the top right side of the page. On this new page, he will check the box next to the investor name and submit his changes by clicking the checkmark to the right.

Fred would also like to update the round amount and can do so by entering an amount (no dollar signs) into the amount text box.

Finally, Fred would like to add his friends at Eden Ventures to the Series B round. He can do so by typing in this investor in the "Add Investor" text box and selecting from the drop down.

After making these changes, Fred will click the blue check mark icon located to the right of the row to save all of his changes.

Back to Portfolio

Zemanta

Info Fundings

Add a Funding

DATE	ROUND	AMOUNT (\$M)	VALUATION (\$M)	INVESTORS	SOURCE URL	NOTES	SAVE
01/22/2016	Series C	3.23		Add investor Lead <input type="checkbox"/> Eden Ventures × <input type="checkbox"/> Union Square Ventures ×	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11/05/2013	Series B	2		Add investor Lead <input type="checkbox"/> Social Starts × <input type="checkbox"/> Union Square Ventures ×	<input type="checkbox"/>		<input checked="" type="checkbox"/>
11/19/2010	Series A	3		Add investor Lead <input type="checkbox"/> Eden Ventures × <input type="checkbox"/> Union Square Ventures ×	<input type="checkbox"/>		<input checked="" type="checkbox"/>
09/19/2008	Seed VC	0.75		Add investor Lead <input type="checkbox"/> Eden Ventures × <input type="checkbox"/> Union Square Ventures ×	<input type="checkbox"/>		<input checked="" type="checkbox"/>

Step 4: Add a New Funding Round

Zemanta has a new funding round. To add this information, Fred will click “Add a Funding” on the top left side of the page. This will bring him to the bottom of the fundings page, where a blank row will appear for him to enter the new funding round information. Once Fred enters the round information, he will click the blue check mark icon located to the right of the row.

11/05/2013	Series B	2		Add investor		✓		✓
Lead <input type="checkbox"/> Social Starts × <input type="checkbox"/> Union Square Ventures ×								
11/19/2010	Series A	3		Add investor		✓		✓
Lead <input type="checkbox"/> Eden Ventures × <input type="checkbox"/> Union Square Ventures ×								
09/19/2008	Seed VC	0.75		Add investor		✓		✓
Lead <input type="checkbox"/> Eden Ventures × <input type="checkbox"/> Union Square Ventures ×								
06/24/2008	Seed	1.5		Add investor		✓		✓
Lead <input type="checkbox"/> The Accelerator Group ×								
09/21/2007	Angel	0.1		Add investor		✓		✓
Lead <input type="checkbox"/> Seedcamp ×								
MM/DD/YYYY	Select a round			Add investor		✓		✓
Lead								