PRIVCO LIST BUILDER · USER GUIDE

Getting the most from PrivCo List Builder

List Builder helps you find private companies and the executives who run them, build lists and export them. AI Search and the PrivCo AI integration are included.

Last reviewed 2 November 2026. If something looks different, email support@privco.com.

What your plan includes

Included

- Company, investor, funding, deal and people search
- Company profiles with financials, funding and deals
- Key executive (C-level) contacts
- Watchlists, saved searches and email alerts
- Excel export of company lists and contacts; PDF profiles
- Ask PrivCo AI and the PrivCo AI integration

Not included

- Excel export of funding rounds, deals and investors
- All contacts beyond key executives
- Data API and Excel add-in

How the plans compare

Feature	Power	List Builder your plan	Academic
Company, investor, funding and deal search	✓	✓	✓
People search	✓	✓	✗
Company profiles open straight away	✓	✓	✓
Financials, funding and deals	✓	✓	✓
Contacts with email and phone	✓ All contacts	— Key executives	✗
Watchlists, saved searches, email alerts	✓	✓	✓
Excel export: companies	✓	✓	✓
Excel export: contacts	✓	✓	✗
Excel export: funding, deals, investors	✓	✗	✓
PDF company profiles	✓	✓	✓
Ask PrivCo AI (in the app)	✓	✓	✗
AI integration (Claude, ChatGPT, Copilot)	✓	✓	— On request
Data API and Excel add-in	— On request	✗	— On request
Chrome extension	✓	✓	✓

✓ included — partly, or on request ✗ not included

How PrivCo works

1. Find
Search by industry, location, size and funding, or type a name in the top bar.

2. Open
A company profile: overview, financials, funding and deals, contacts.

3. Track
Save the search and add companies to a watchlist; alerts arrive by email.

4. Export
Download lists to Excel or a profile as a PDF.

Or ask in plain English

Ask PrivCo AI on Home, or your own AI assistant with the PrivCo AI integration, does steps 1 to 3 for you.

PrivCo Home AI Search Search Lists Deal Flow Your name (top right)

Search by company, investor or keyword

Home
· Featured deals
· Ask PrivCo AI
· Plan and usage

AI Search
· Questions in plain English

Search
· Company
· Investor
· Funding
· Deal
· People
· Wealth

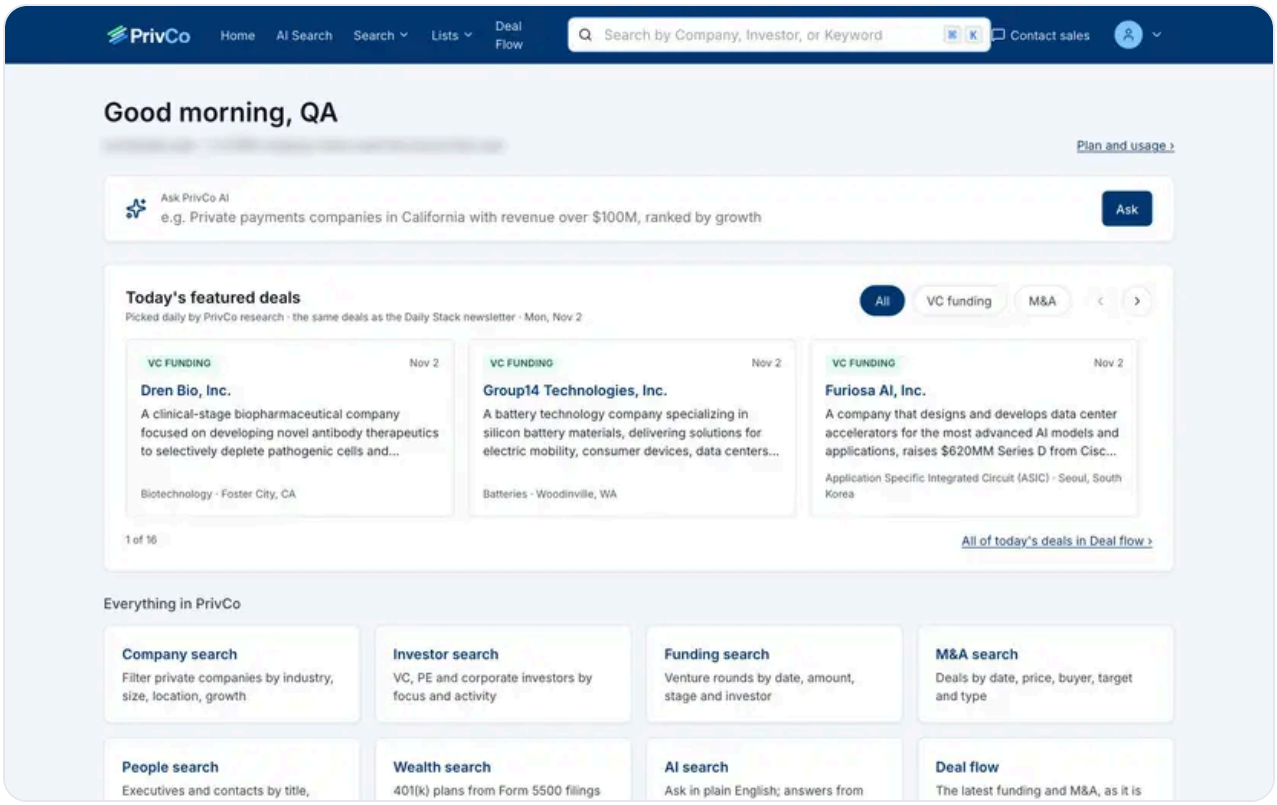
Lists
· Watchlists and saved searches
· Contact lists

Deal Flow
· Latest funding and M&A

Your name (top right)
· My Account: Profile, Subscription, Allowances, Security
· Logout

1. Signing in and your home page

- Go to system.privco.com and click **Sign In**. Use the email address your account was set up with.
- Forgot your password? Request a reset link at system.privco.com/forgot-password.



Home: featured deals, shortcuts to every search, and Plan and usage (top right).

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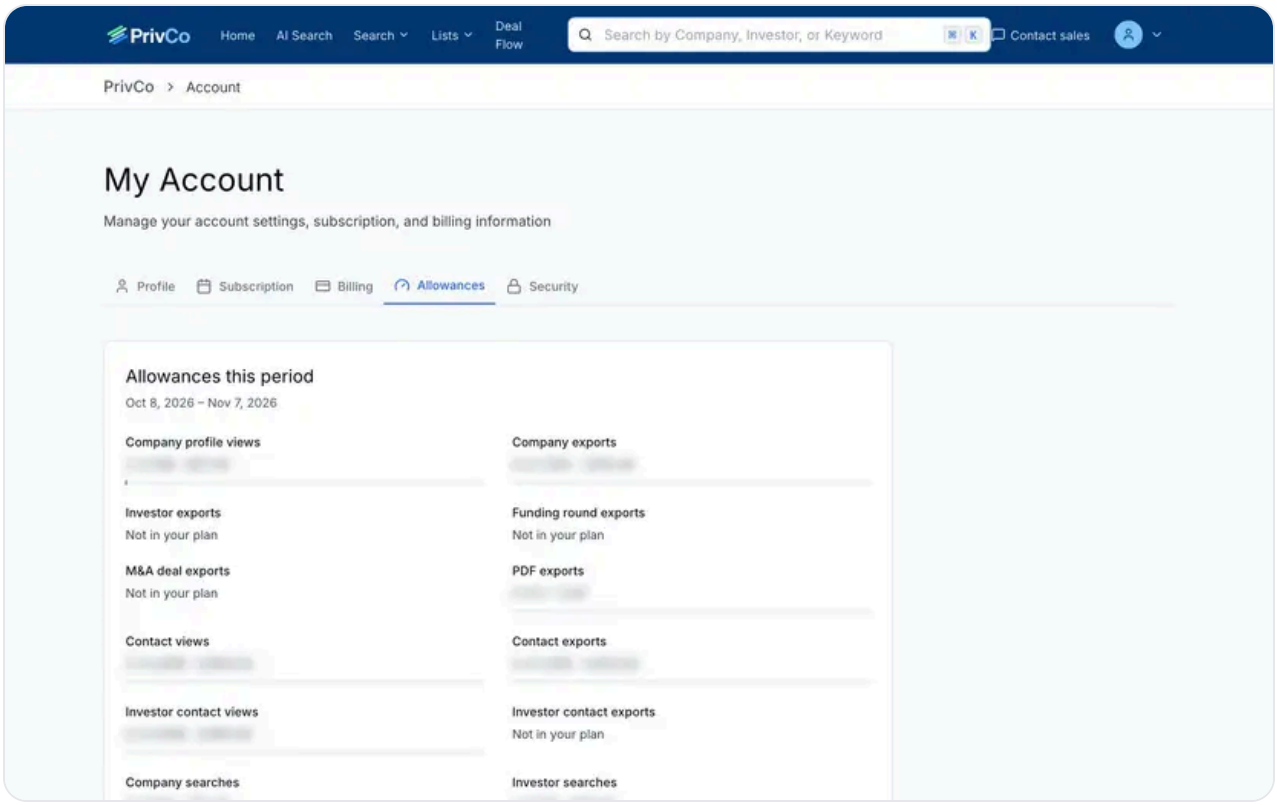
2. Your plan and allowances

Your plan includes monthly allowances for company profiles, searches and exports. To see them, click **Plan and usage** on Home, or open the menu at the top right and choose **My Account**:

- **Subscription** shows your plan (List Builder) and when it renews or ends.
- **Allowances** shows each allowance and how much of it you have used.
- **Billing** shows your payment card and past invoices.



My Account → Allowances: each allowance and how much of it you have used this period (figures hidden here).

To change your plan or allowances, email support@privco.com. For more contacts, the data API or larger allowances, ask about Power at sales@privco.com.

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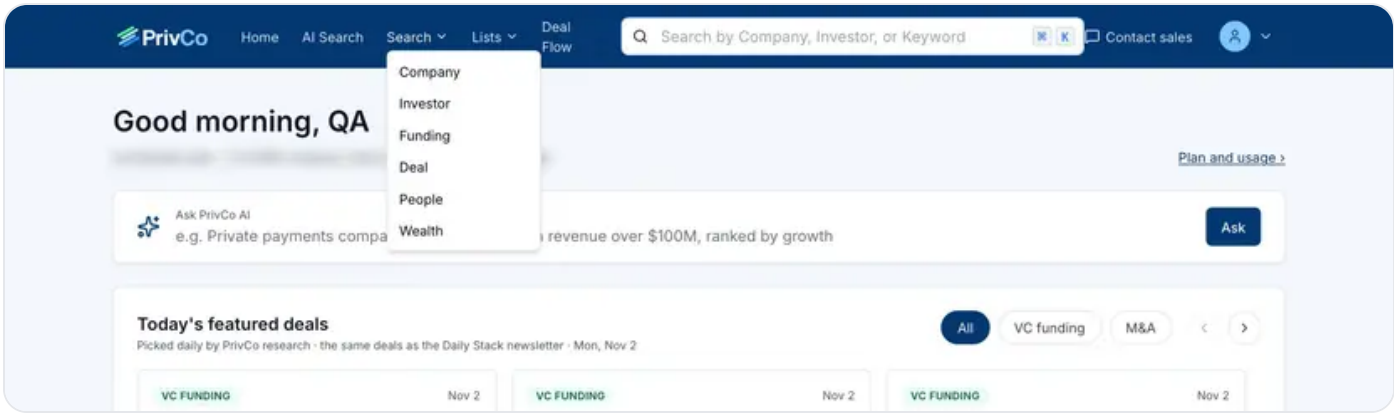
3. Finding companies, investors and deals

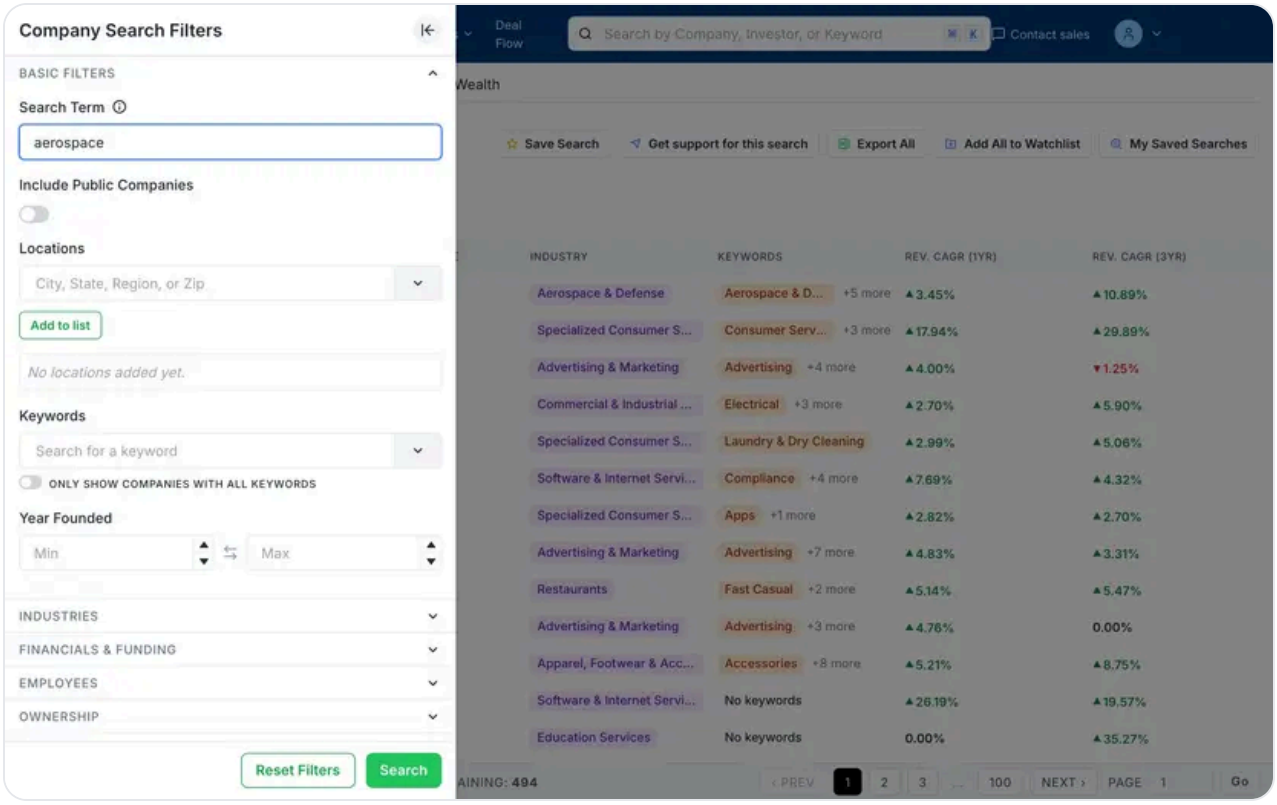
Use the **Search** menu at the top of every page, or type a company or investor name in the search bar:



The Search menu.

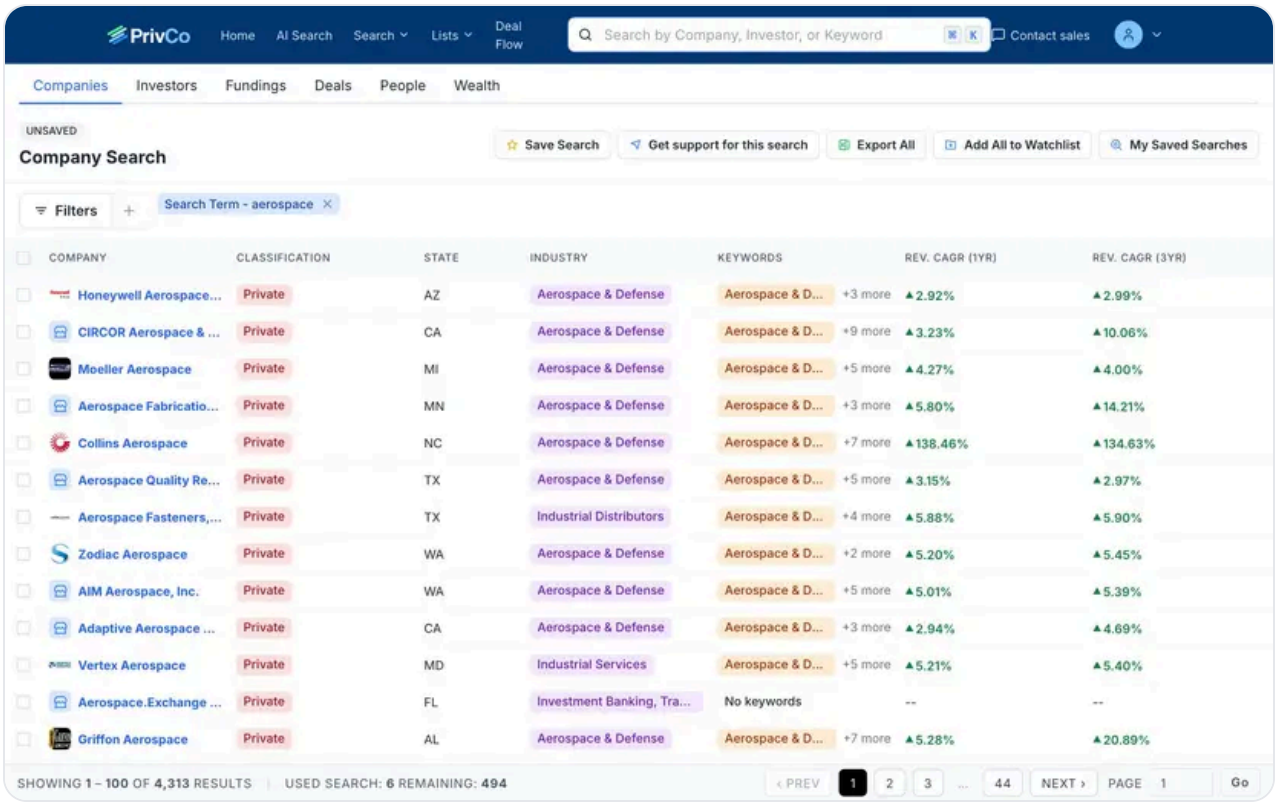
Company	Private companies by industry, location, size, funding and more
Investor	Venture capital, private equity and other investors
Funding	Funding rounds by date, size, stage and investor
Deal	Mergers, acquisitions and other transactions
People	Executives and other people at private companies
Wealth	401(k) and benefit plans from Form 5500 filings

Narrow the results with the filters on the left, then click **Search**.



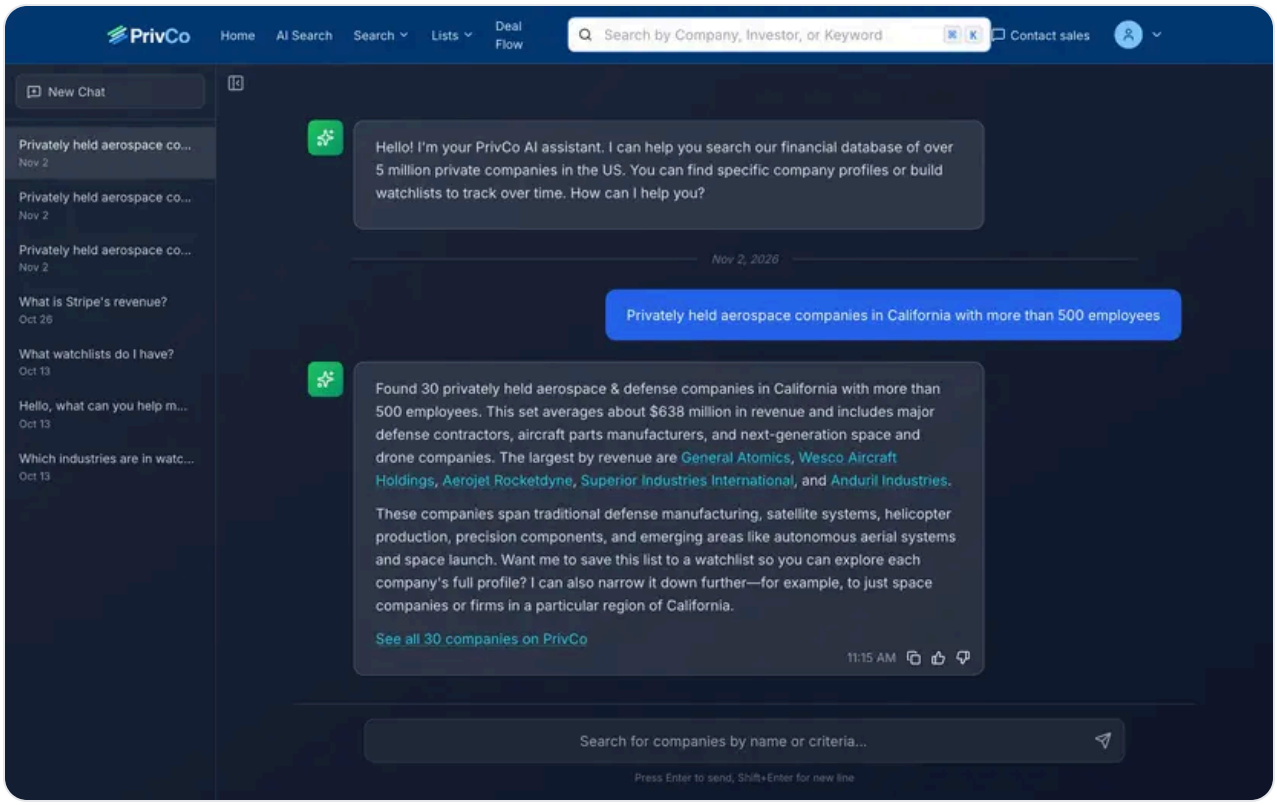
Company search: filters for keywords, location, industry, financials and funding, employees and ownership.

Above the results: **Save Search** keeps the search (it reruns and alerts you to new matches), **Export All** downloads the list to Excel, and **Add All to Watchlist** follows every company in it.



Search results with Save Search, Export All and Add All to Watchlist.

Ask PrivCo AI on Home takes a question in plain English, such as *“privately held aerospace companies in California with more than 500 employees”*, and answers from PrivCo data with links to each company.



Ask PrivCo AI: the answer names the companies and offers to save them to a watchlist.

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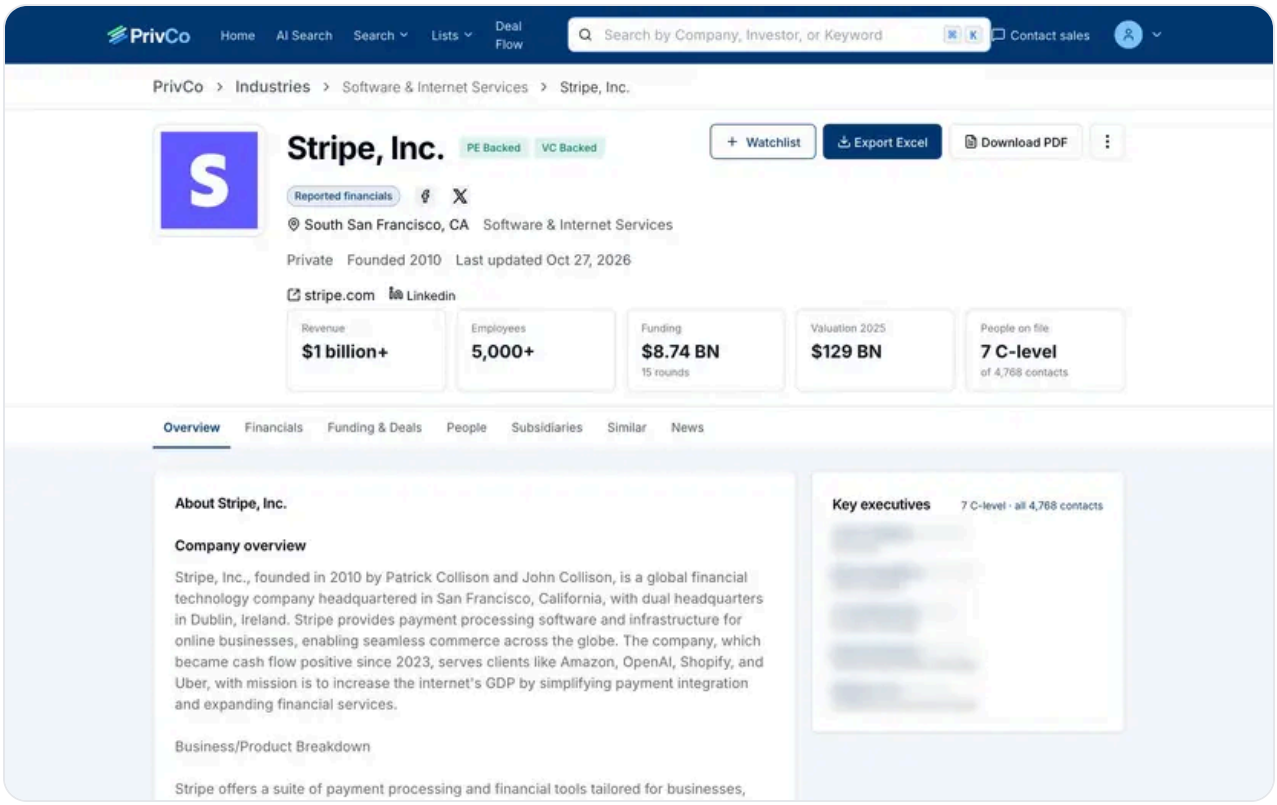
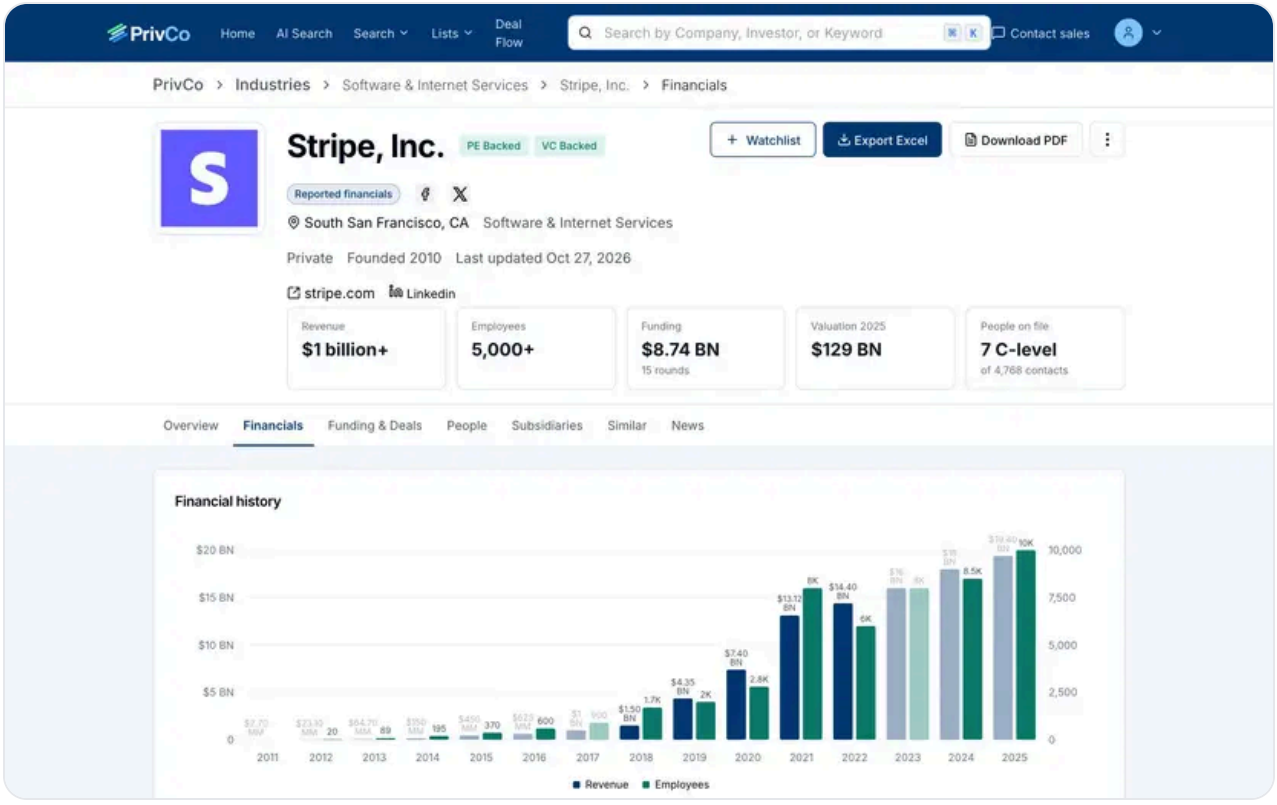
4. Company profiles and contacts

A List Builder profile opens straight away, and each new company you open counts as one profile view. Across the top: **Watchlist**, **Export Excel** and **Download PDF**. The tabs:

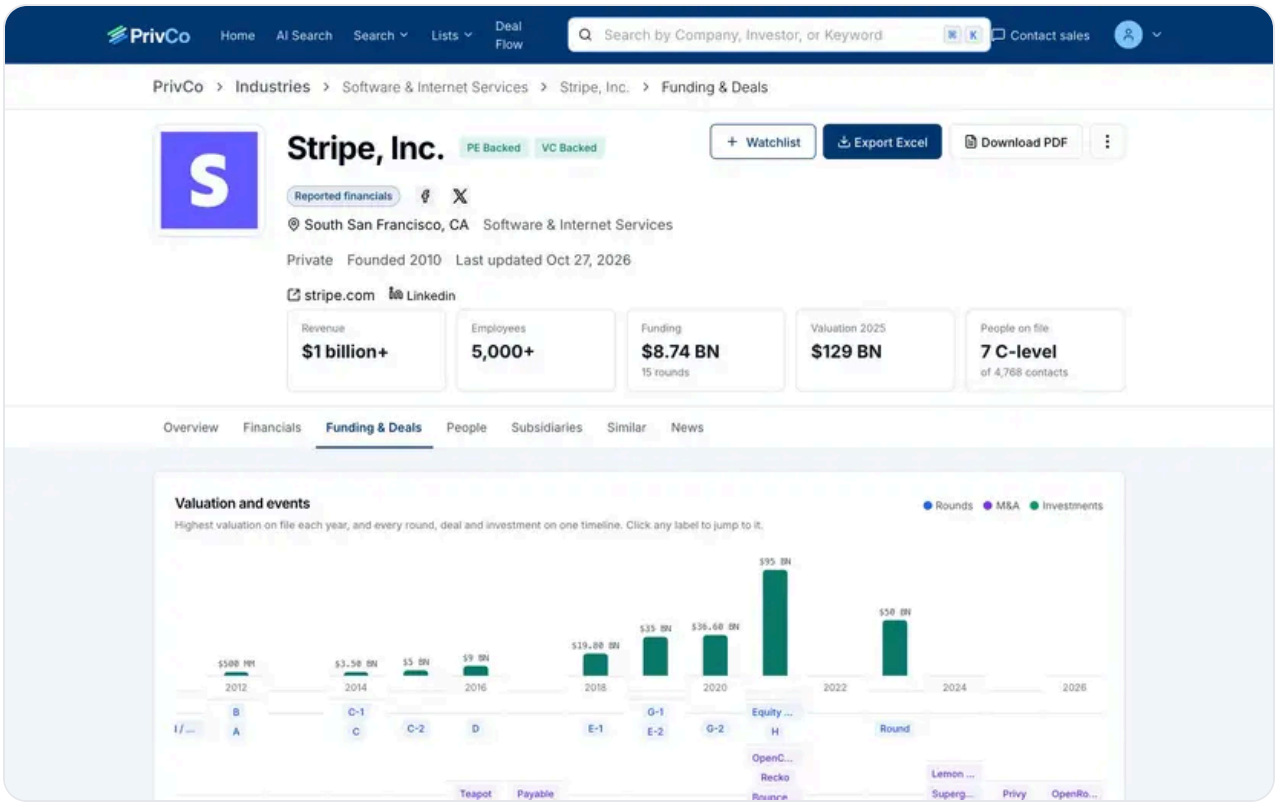
- **Overview**: description, industry, headquarters, website and the key figures
- **Financials**: revenue and employee history, reported or estimated by PrivCo
- **Funding & Deals**: valuations, funding rounds, investors and acquisitions on one timeline
- **People**: the company's key executives (CEO, CFO and other C-level officers), with email and phone where available
- **Subsidiaries**, **Similar** and **News**



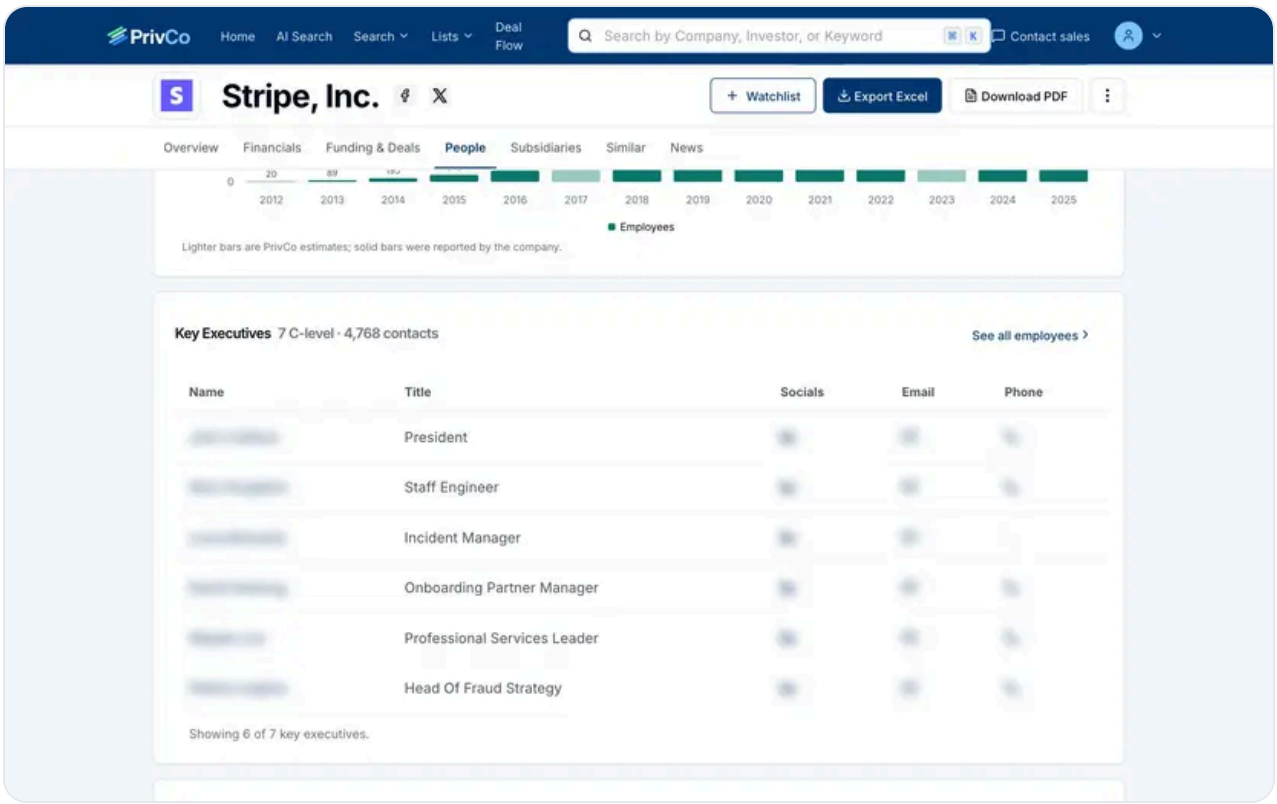
A company profile: key figures across the top, then the tabs.



Financials: lighter bars are PrivCo estimates; solid bars were reported by the company.



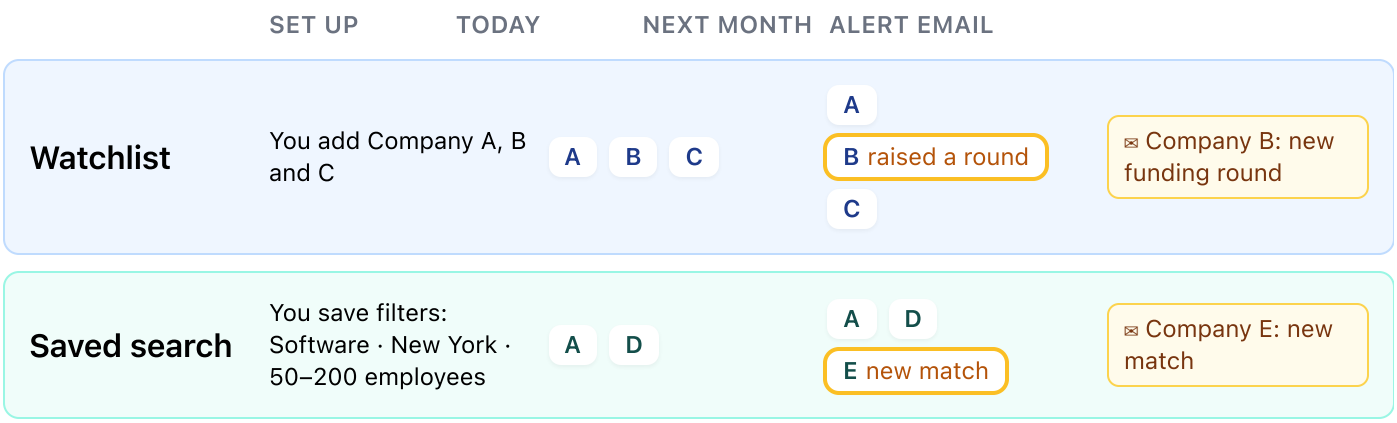
Funding & Deals: every round, deal and investment on one timeline.



People: names, emails and phone numbers are blurred in this guide; you see them in full.

5. Watchlists, saved searches and email alerts

A **watchlist** is a list of companies you pick: it changes only when you add or remove one. A **saved search** is a set of filters: each time it runs, it finds whatever matches now. Use a watchlist to follow companies you know, and a saved search to spot new ones.

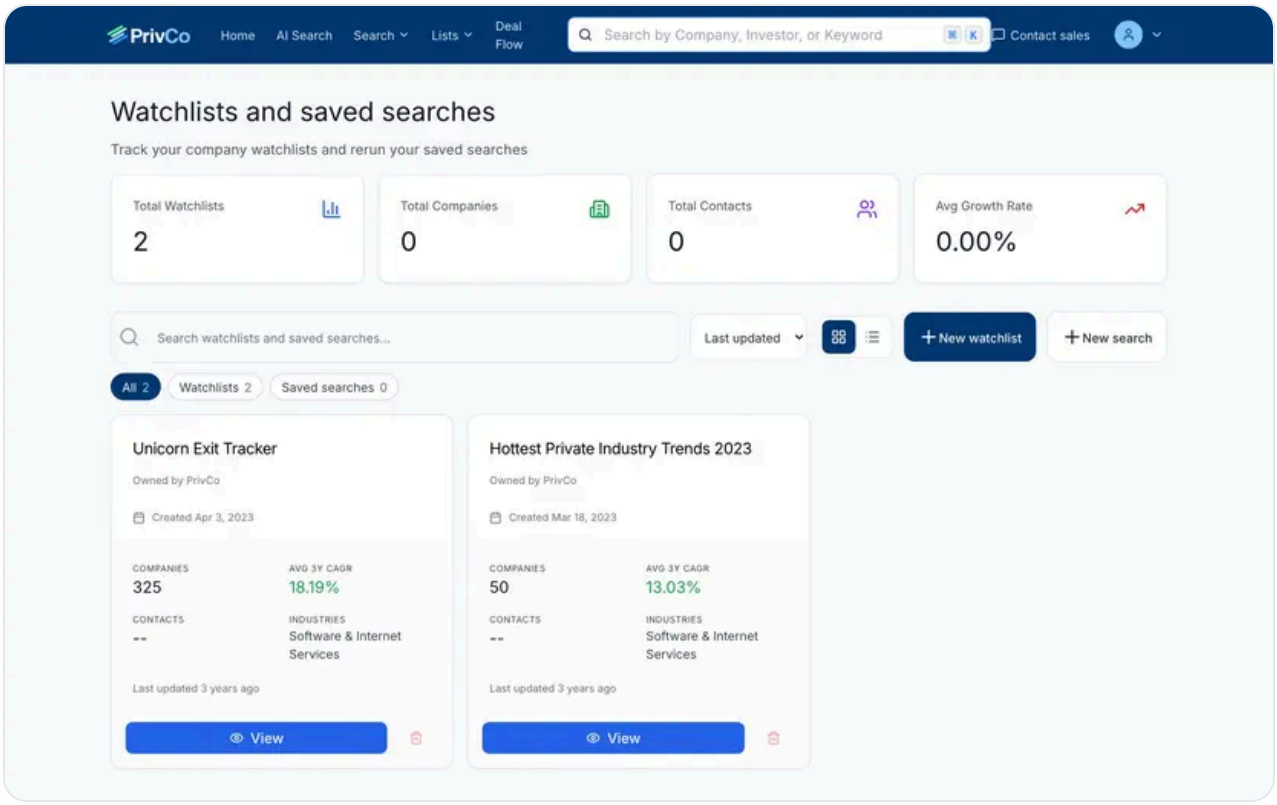


A watchlist keeps the same companies and tells you when one changes. A saved search runs again and tells you when a new company matches.

	Watchlist	Saved search
What it is	Companies you pick	Search filters you save
What's in it	The same companies until you add or remove one	Whatever matches the filters each time it runs
Alerts tell you	A company on it changed: funding, deals, financials, ownership, IPO, bankruptcy	Results that match are new or updated
Best for	Following companies you already know	Spotting new companies that fit your criteria
Create	+ Watchlist on a company, or tick results → Add to watchlist	Run a search → Save Search
Set alerts	Open the watchlist → Alerts	Set Alert on the saved search, or pick a frequency when saving

Alerts for both come in one email digest. On a watchlist, switch on **Alerts** and choose how often and which changes. On a saved search, click **Set Alert**, or pick a frequency in the **Save Search** dialog as you save it.

Your lists are under **Lists** → **Watchlists and saved searches**, or **My Watchlists** in the top menu. Click **New watchlist** to start one, or **Watchlist** on any company profile to add that company.



Lists → Watchlists and saved searches.

Contact lists (under **Lists**) collect the contacts you pick from company profiles, ready to export.

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6. Exports

- **Excel**: company lists, contacts.
- **PDF**: company profiles.
- Each export counts toward the matching allowance on **My Account** → **Allowances**.

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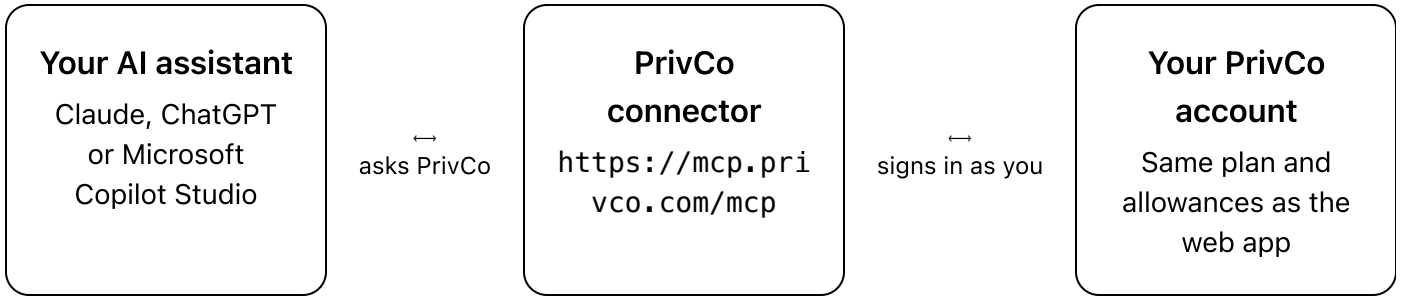
7. PrivCo in your AI assistant

List Builder includes the **PrivCo AI integration**. Your AI assistant can search PrivCo and read company profiles for you, so you can ask it to build and enrich lists.



Connect once and sign in with your PrivCo email and password. Step-by-step guides for Claude, ChatGPT and Microsoft Copilot Studio are at privco.com/ai-integration.

Company profiles your assistant opens count toward your AI integration allowance.

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8. Chrome extension

The PrivCo extension for Google Chrome shows when a website you visit belongs to a company in PrivCo, with a link to its profile. Install it from the Chrome Web Store (https://chromewebstore.google.com/detail/privco/djpngaeogfjbijiniddohkomeiebjeek) and sign in with your PrivCo account.

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9. Getting help

How-to and setup questions	support@privco.com
Billing, invoices or cancelling	accountsupport@privco.com
Upgrading to Power	sales@privco.com
Frequently asked questions	privco.com/help-center