

Business List Report

Creating a Business List Report with a Filter

OVERVIEW

This document will take you through the process of creating a Business List report.

Business List reports help you identify and locate potential customers or clients within an analysis area.

LOCATE THE BUSINESS LIST REPORT

1. From the homepage, click on the Reports tile.



2. Click the Business List tile.

3. Choose the Business List type that you would like to create.

What type of Business List would you like to create?

Basic Analytical List Complete Analytical List Prospecting: Complete Prospecting: Basic

Search

- > My Analysis Area
 - United States (USA)
- > State (STA)
- > Combined Statistical Area (CSA)
- > Nielsen Designated Market Area (DMA)
- > ...

Do you want to filter your Business List? ON

SELECT REPORT INPUTS

1. Locate and select the geography you want to use for your report.

Note: When a geography has been selected, the icon will turn green.

What type of Business List would you like to create?

Basic Analytical List Complete Analytical List Prospecting: Complete Prospecting: Basic

- Ithaca (14850) (ZIP)
- Lund township (3810148500) (MCD)
- Manitowoc city (5507148500) (MCD)
- Clam Lake CDP (5514850) (PLA)
- Cottondale town (1214850) (PLA)

Do you want to filter your Business List? ON

2. Determine if you want to apply a filter to your business list.

Note: If you do not apply a filter, all businesses in your selected geography will be included in your output.

What type of Business List would you like to create?

Basic Analytical List Complete Analytical List Prospecting: Complete Prospecting: Basic

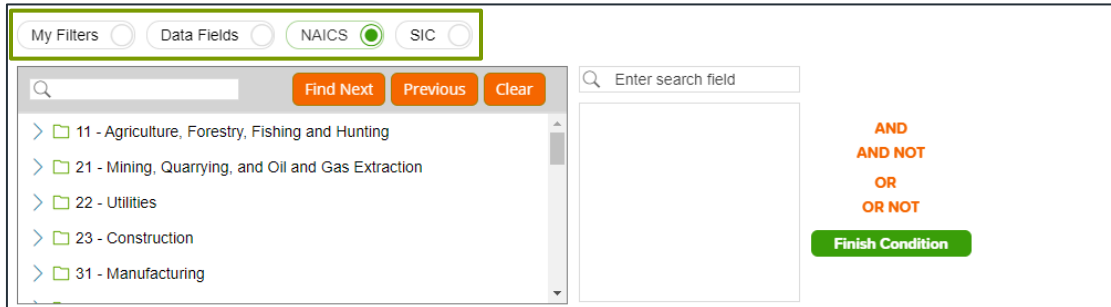
- Ithaca (14850) (ZIP)
- Lund township (3810148500) (MCD)
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- Clam Lake CDP (5514850) (PLA)
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Do you want to filter your Business List? ON

APPLY FILTER TO YOUR BUSINESS LIST (OPTIONAL)

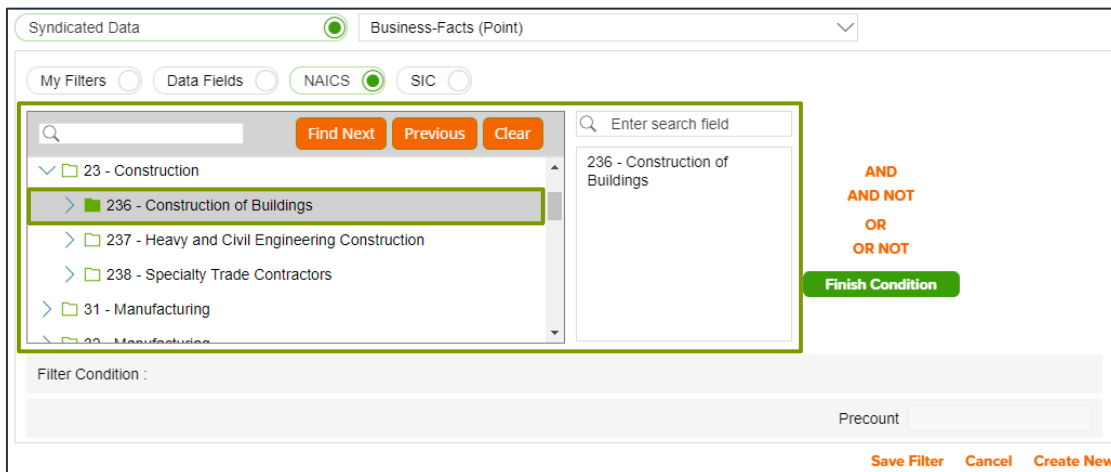
1. To apply a filter to your business list, select the desired filter option.

Note: Previously saved filters, are available under My Filters.

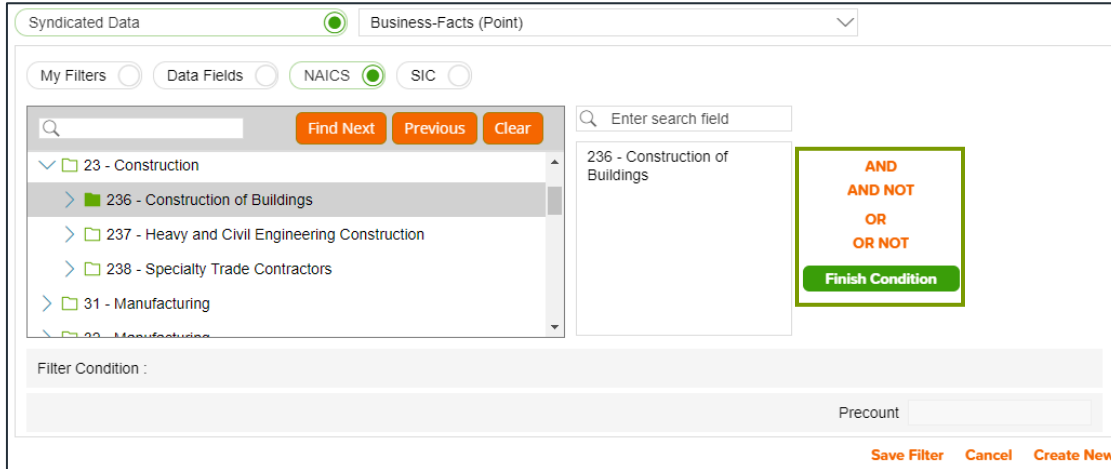


2. Select the filter criteria from the category folders.

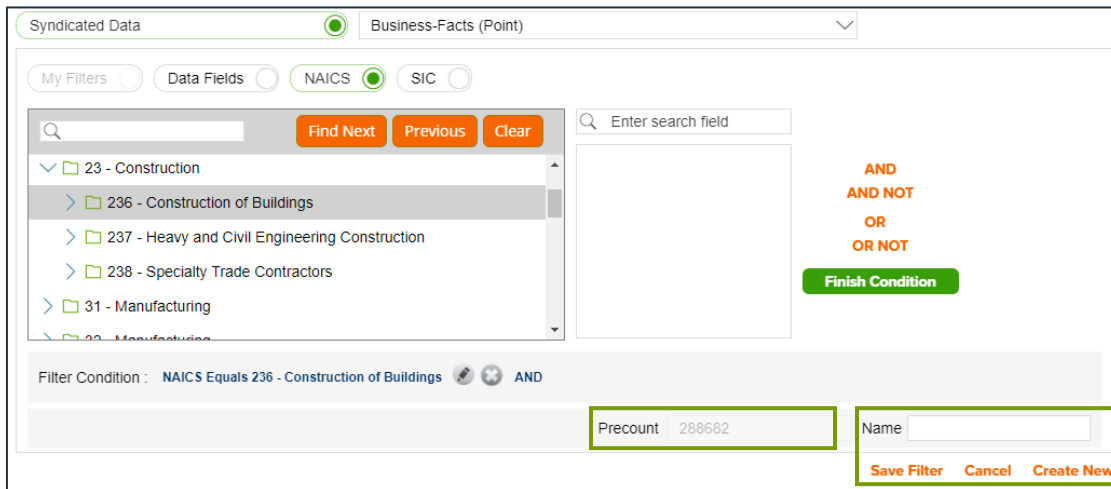
Note: Once criteria is selected, it will appear in the selected panel.



3. More advanced filters can be created by using the available operators. Once your filter is complete, click Finish Condition.



4. Precount of all businesses in your selected geography that met the filter condition is displayed. To save the filter for future use, type a name for the filter and click Save Filter.



SUBMIT THE REPORT

1. Select the desired output format.

Select an output format.

CSV Excel Delimited Text File

Do you want to limit the number of records in the output? OFF

Calculate the number of records. Records:

Name of your Business List:

2. Click ON to limit the number of records in the output. You are given the option to 'select the top n records' or 'select every nth record.'

Once you make your selection, click Calculate to display the count of businesses that will be included in your output.

Select an output format.

CSV Excel Delimited Text File

Do you want to limit the number of records in the output? ON

Select the top n records Select every nth record #

Calculate the number of records. Records:

Name of your Business List:

3. Name your business list and click Submit Job.

Select an output format.

CSV Excel Delimited Text File

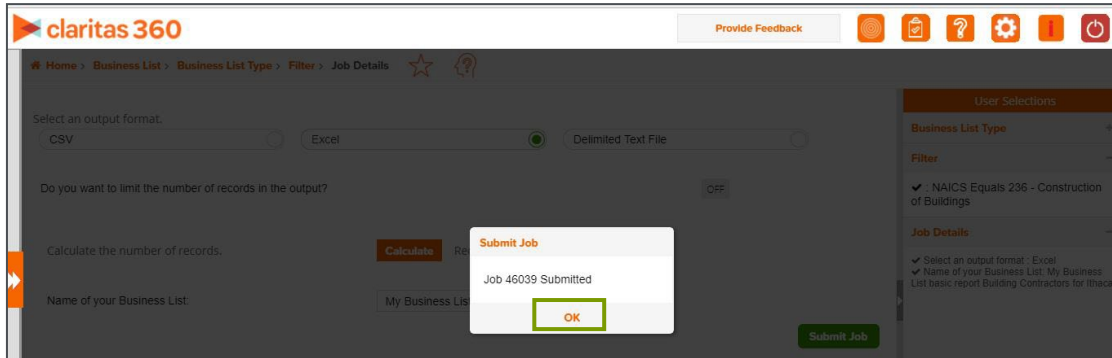
Do you want to limit the number of records in the output? ON

Select the top n records Select every nth record #

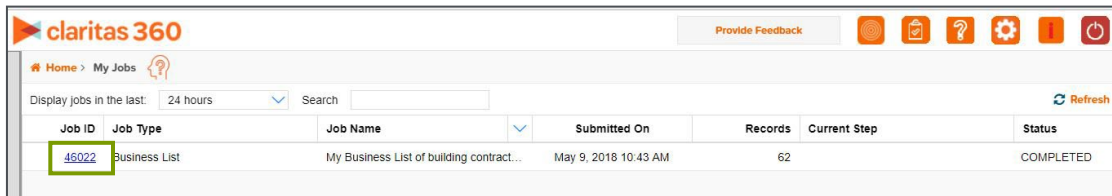
Calculate the number of records. Records:

Name of your Business List:

4. Click OK to retrieve the report.



5. Once the report is complete, click the Job ID number.



6. Click Report Output to view your report.

