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.
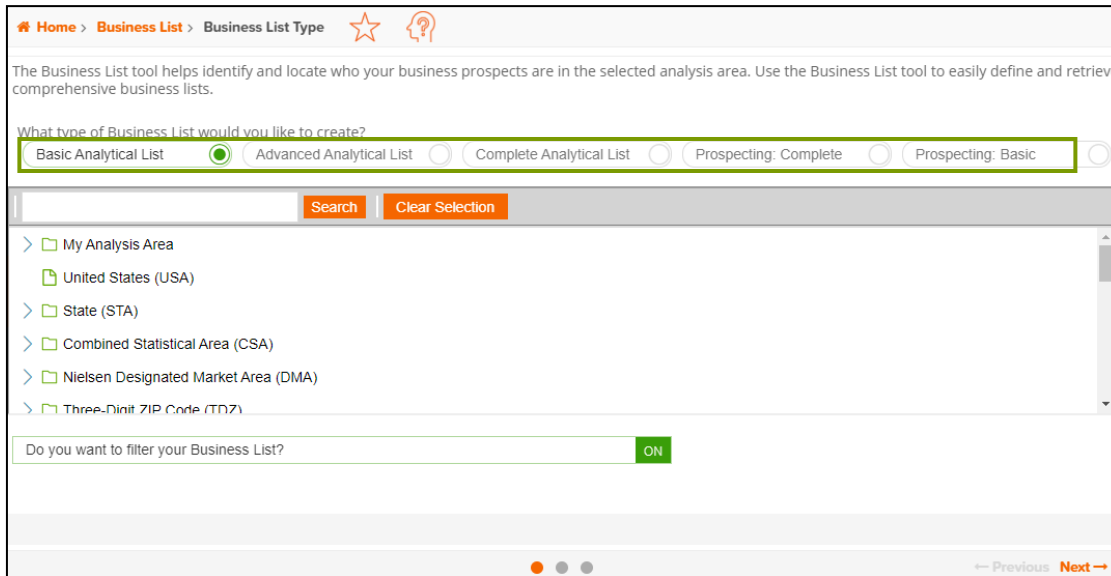
LOCATE THE BUSINESS LIST REPORT

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

2. Click the Business List tile.
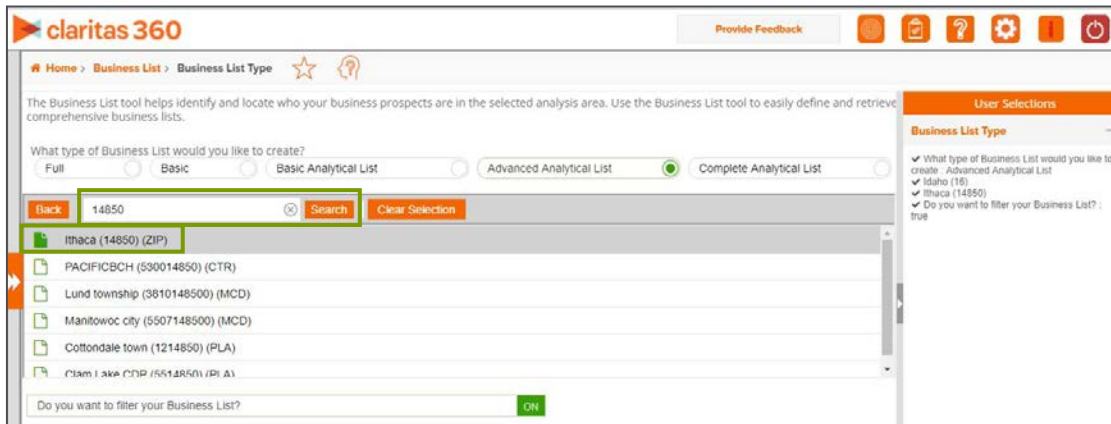
identify
deliver
optimize

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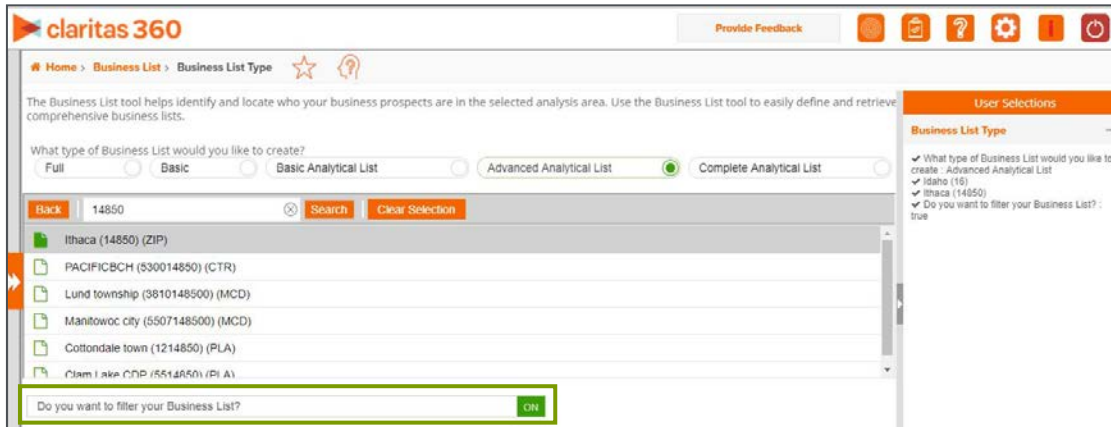

SELECT REPORT INPUTS

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.

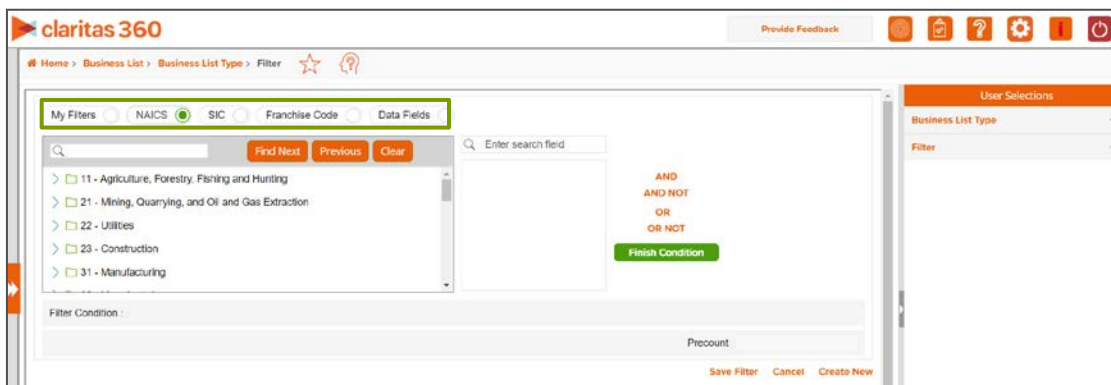2. Determine if you want to apply a filter to your business list.

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

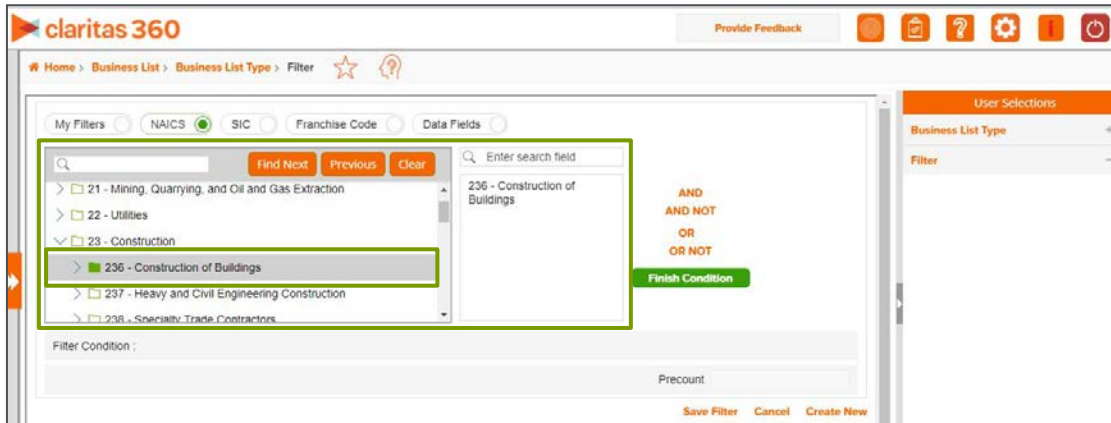

APPLY FILTER TO YOUR BUSINESS LIST (OPTIONAL)

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

    Note: Previously saved filters, are available under My Filters.
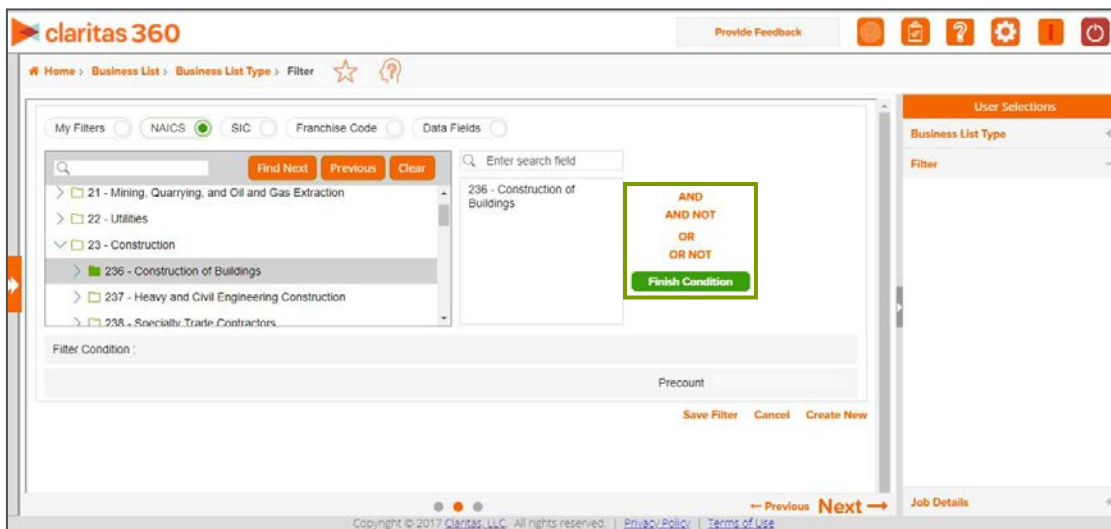
2. Select the filter criteria from the category folders.

   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.
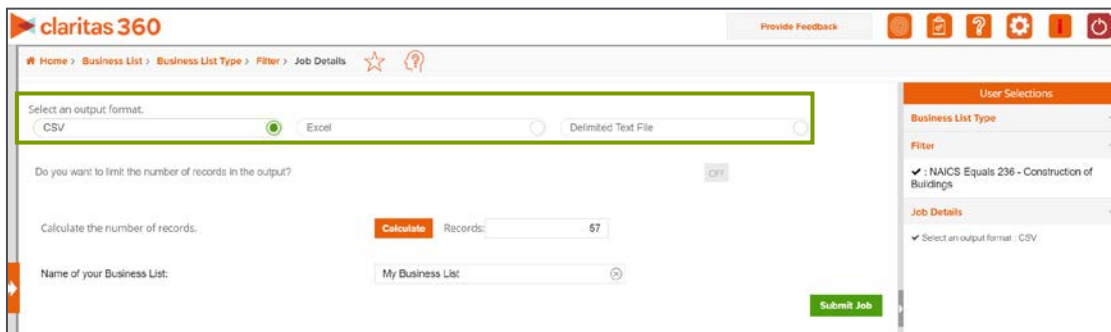
4. A Precount of all businesses in your selected geography that met the filter condition is displayed.

   To save the filter for future use, type a name for the filter and click Save Filter.
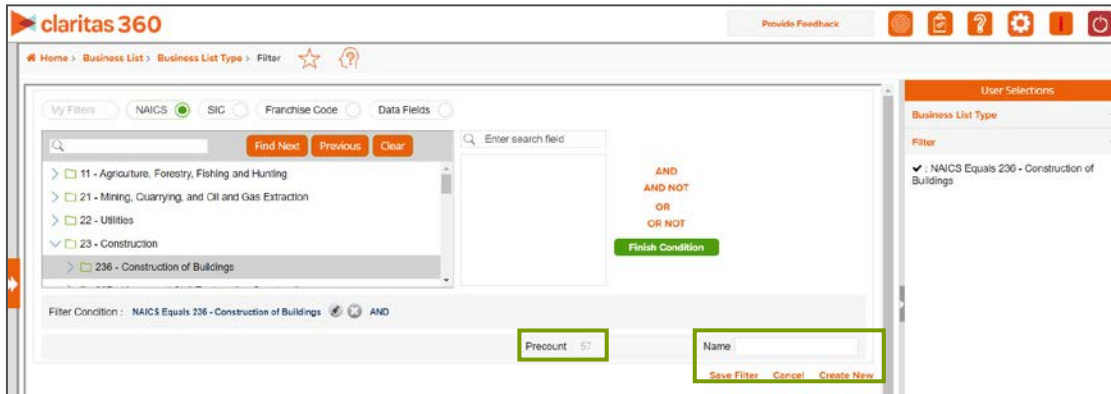
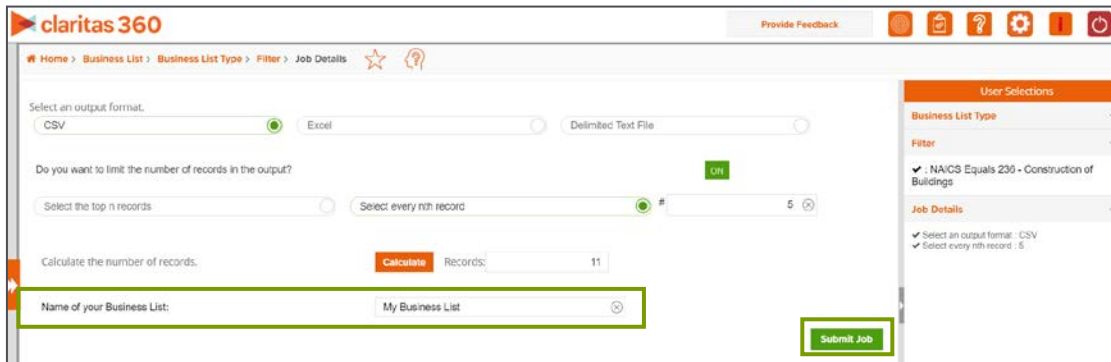## SUBMIT THE REPORT

1. Select the desired output format.

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.'
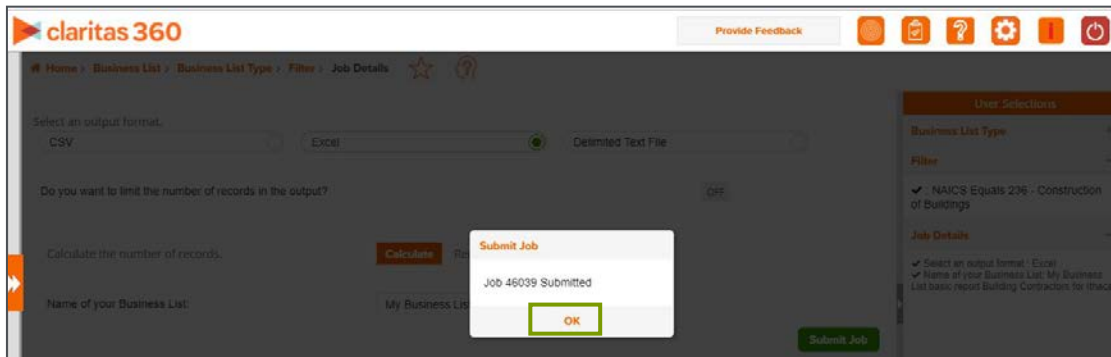
Once you make your selection, click Calculate to display the count or businesses that will be included in your output.
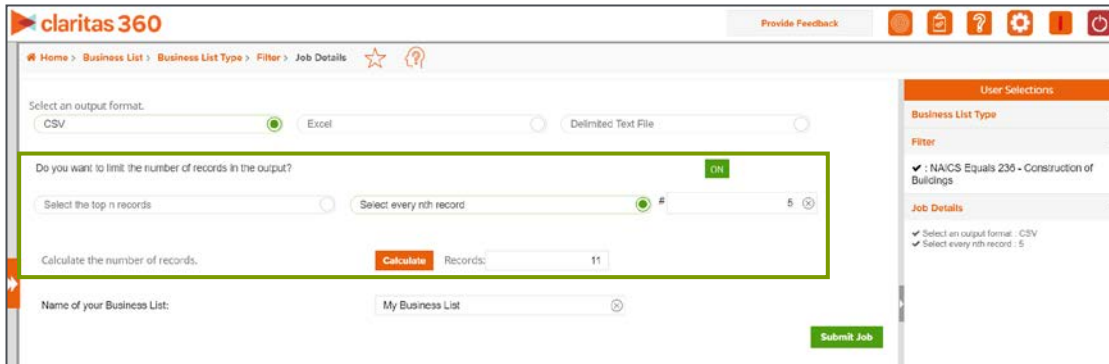
3. Name your business list and click Submit Job.

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.