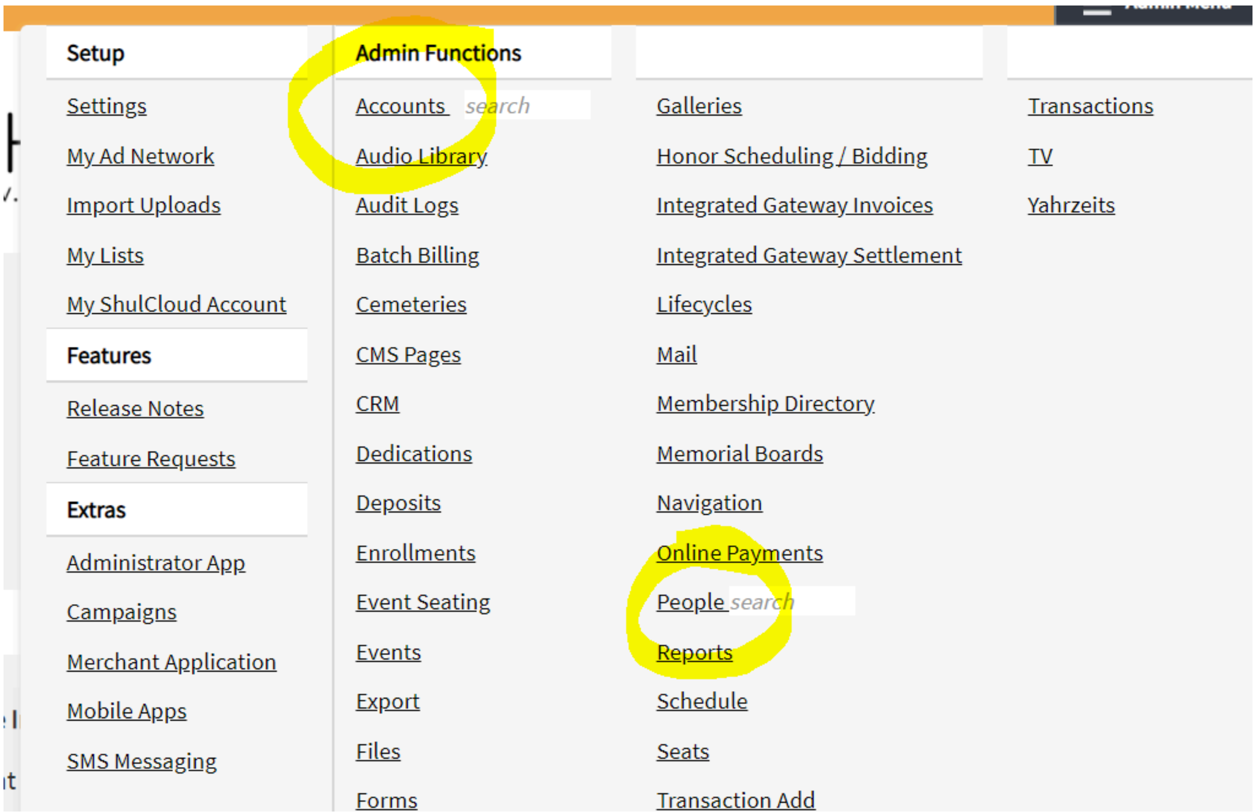
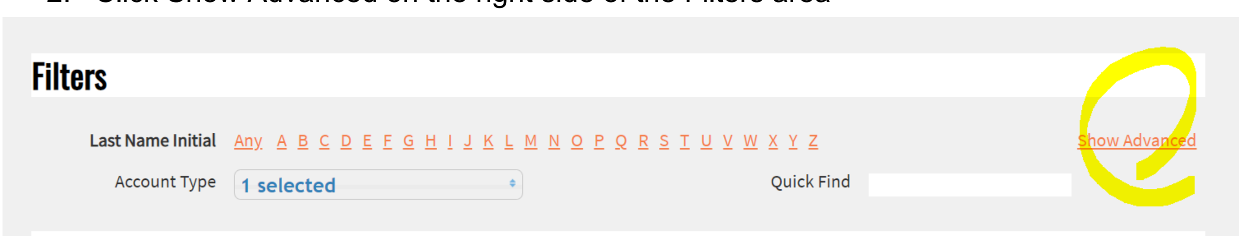
Running a Simple Demographic List

If you are looking for basic demographic information about your account holders you will use the Account or People area of My Lists. This example is for Account lists but could easily be applied to People searches.

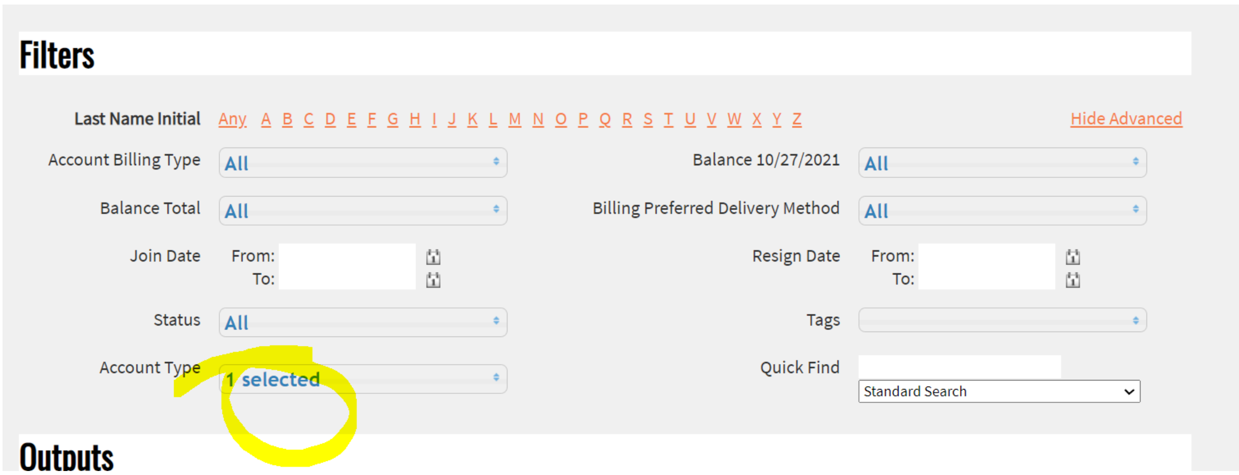
1. Admin Menu>Accounts (or People



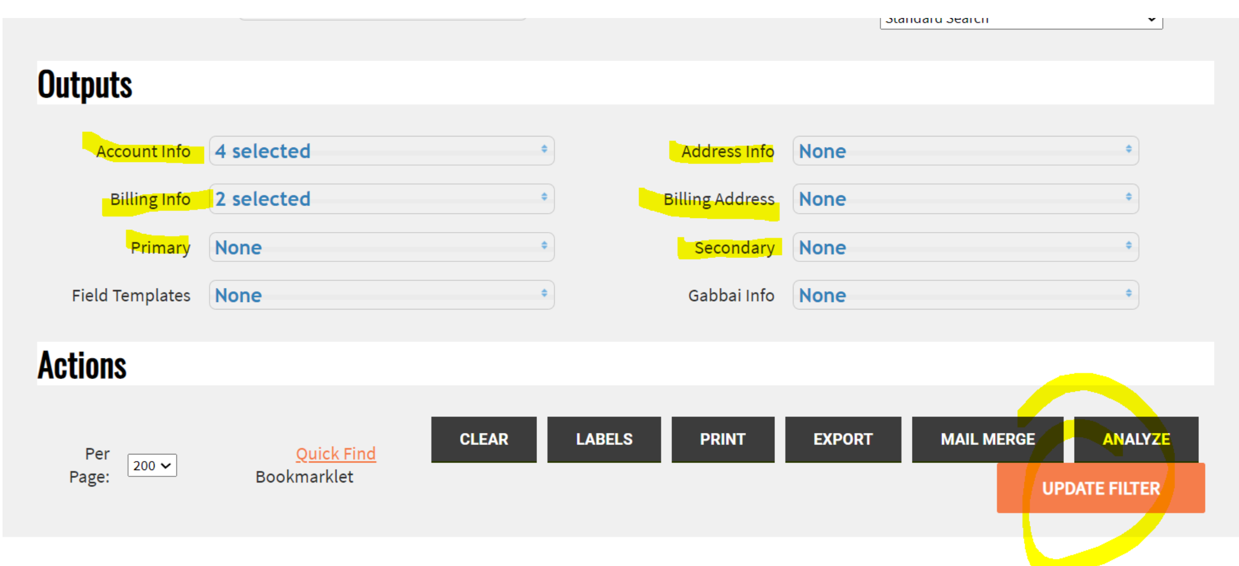
2. Click Show Advanced on the right side of the Filters area



3. Select the parameters of your search. In this example, we will be generating an address list of all Partners. So we've selected "Partner" from Account Type as the only parameter.



In the Outputs section select all the information you want to generate about each account ie: address, email for Primary/Secondary, name for Primary/Secondary, phone number etc. Click Update Filter



The resulting list can then be exported to Excel, used to create labels,exported as a PDF, etc.