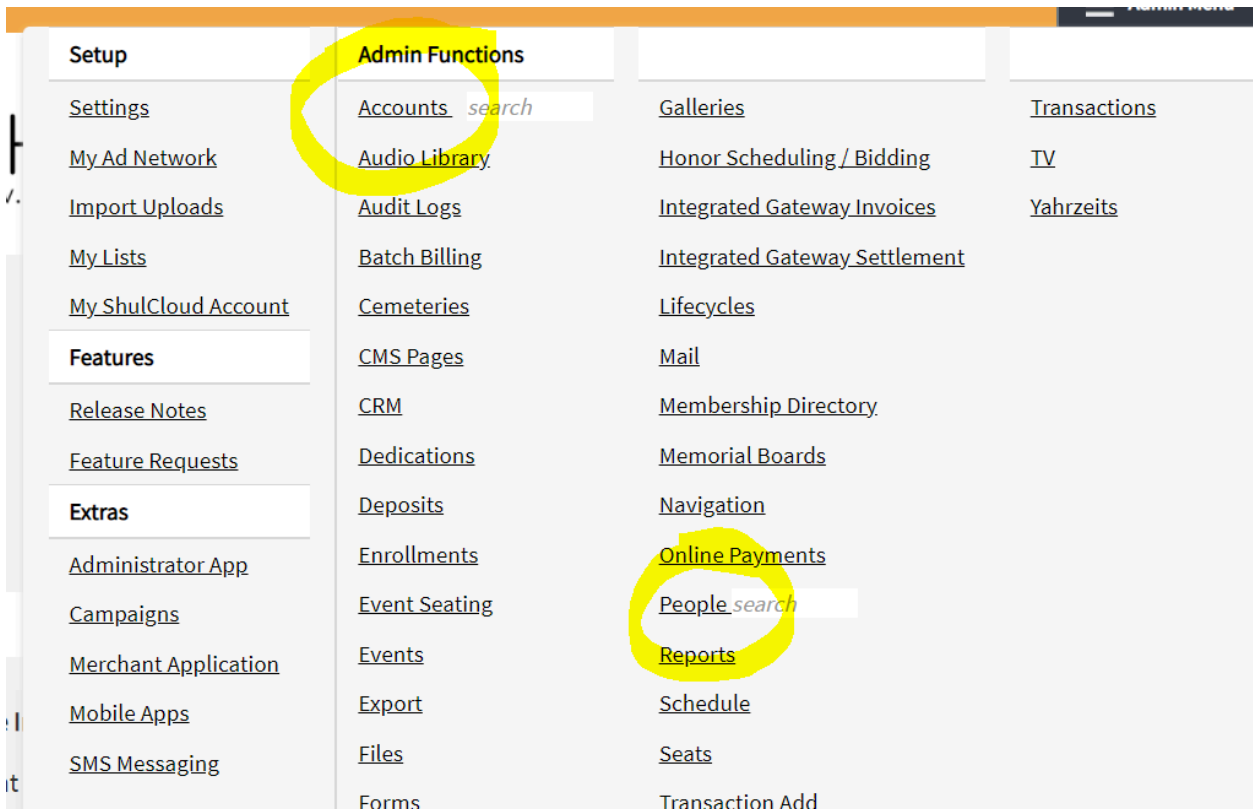


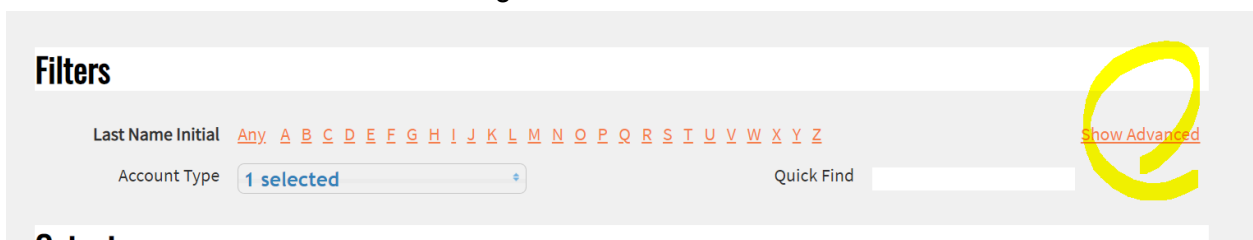
Running a Simple Demographic List

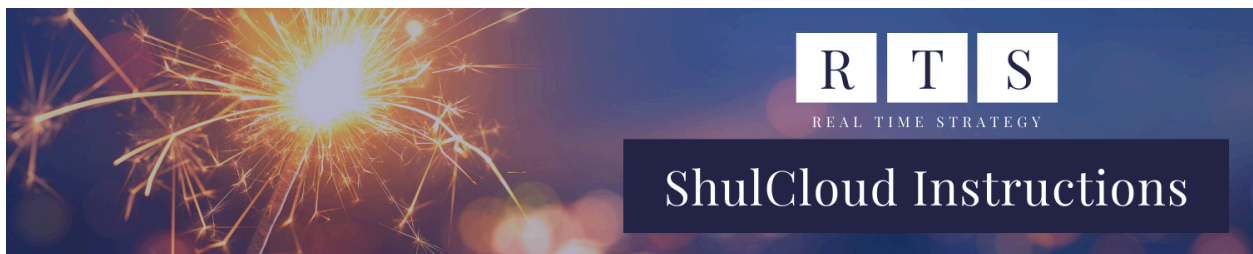
If you are looking for basic demographic information about your account holders you will use the Account or People area of My Lists. This example is for Account lists but could easily be applied to People searches.

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.

The 'Filters' section contains various search criteria. A yellow circle highlights the 'Account Type' dropdown menu, which is currently set to '1 selected'. Other filters include 'Last Name Initial' (Any, A-Z), 'Account Billing Type' (All), 'Balance 10/27/2021' (All), 'Balance Total' (All), 'Billing Preferred Delivery Method' (All), 'Join Date' (From/To), 'Resign Date' (From/To), 'Status' (All), 'Tags', and 'Quick Find' (Standard Search).

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 'Outputs' section shows various information categories with selection counts: 'Account Info' (4 selected), 'Address Info' (None), 'Billing Info' (2 selected), 'Billing Address' (None), 'Primary' (None), 'Secondary' (None), 'Field Templates' (None), and 'Gabbai Info' (None). The 'Actions' section includes a 'Per Page' dropdown set to 200, a 'Quick Find' bookmarklet, and buttons for 'CLEAR', 'LABELS', 'PRINT', 'EXPORT', 'MAIL MERGE', and 'ANALYZE'. A yellow circle highlights the 'UPDATE FILTER' button.

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