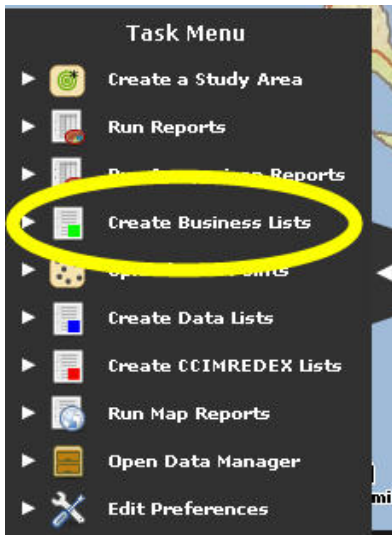


Business List Tutorial

Run Business List Report (By Study Area)

This method consists of five steps and allows the user to generate a report containing business listings located within a particular study area.

After creating a study area, click "Create Business Lists" from the Task Menu on the left. When the workflow begins at the top, click "Run Business List Report (By Study Area)". Instructions for the "Export Filtered Business List" are listed further in the tutorial.



Step 1 of 5: Select database

This step prompts the user to select the desired database to be used when generating the report. Currently, Experian is the only database available.



Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 5: Select your study area(s)

This step prompts the user to select the study area(s) of interest for report generation. At least one study area must be selected in order to submit a report order. Active study areas automatically appear in the table; however, the user has the ability to run reports for inactive study areas as well. To show all saved study areas, simply click on the arrow next to 'Active Studies' and select 'All Studies'. There are two methods for selecting study areas. The user can either double click on the desired study area, which automatically adds the study area to the table, or highlight the study area and drag it to the bottom table.

Select your study area(s) Active Studies 2 of 5

Drag rows from the top table to the bottom table or double-click a row in the top table

Name	Description	Category
Sample Dallas Lc	Sherry Lane	Office

Selected Study Areas: Remove Selected

Name	Description	Category

Once the desired study areas are selected, click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 5: Select business filter (All, By NAICS, By SIC, STDB Favorites)

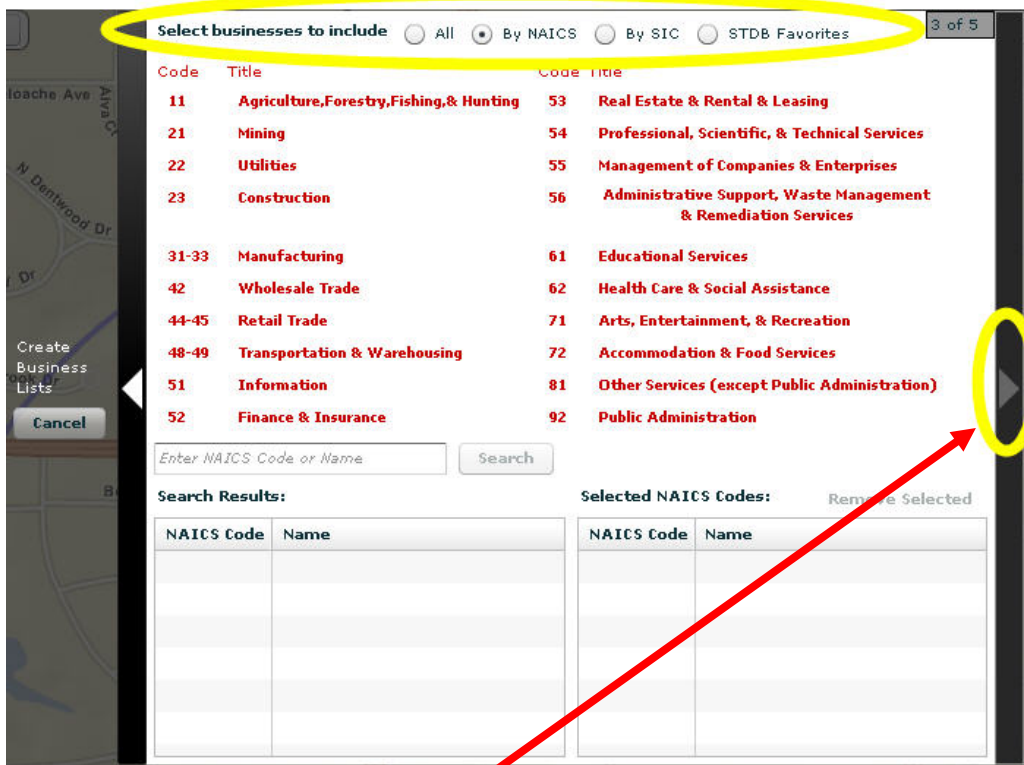
This step prompts the user to select the desired business filter to be used when generating the report(s). The following four filters are available and described below:

All: All businesses within the selected study area(s) will be included in the report(s).

By NAICS: The **North American Industry Classification System (NAICS)** is used by business and government to classify and measure economic activity in Canada, Mexico and the United States. It was released in 1997 and has largely replaced the older Standard Industrial Classification (SIC) system; however, certain government departments and agencies, such as the U.S. Securities and Exchange Commission (SEC), still use the SIC codes. The NAICS numbering system is a six-digit code. The first five digits are generally (although not always strictly) the same in all three countries. The last digit designates national industries. The first two digits designate the largest business sector, the third digit designates the subsector, the fourth digit designates the industry group, and the fifth digit designates particular industries. If this option is selected, the report will only include businesses that match the selected NAICS codes.

By SIC: The **Standard Industrial Classification (SIC)** is a United States government system for classifying industries by a four-digit code. Established in 1937, it is being supplemented by the six-digit North American Industry Classification System (NAICS). If this option is selected, the report will only include businesses that match the selected SIC codes.

STDB Favorites: STDB has pre-defined a list of popular search criteria, based on NAICS codes. If this option is selected, the report will only include businesses that match the NAICS codes contained within the pre-defined STDB Favorite filter.



Once the desired filter is selected, click the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 5: Submit report order

This step allows the user to specify a 'Report Subtitle' and gives the user the ability to add email addresses for other individuals that want to receive the report order. To submit the report order, click "Run Order".

Run 1 Reports for 1 Study A

4 of 5

Report Subtitle: Prepared by Jay R. Lucas, CCIM

Sending Reports to: p2009@stdbonline.com

add

ashley@stdbonline.com

Remove Selected Email

Notify Me When Order is Ready **Run Order**

Cancel

Create Business Lists

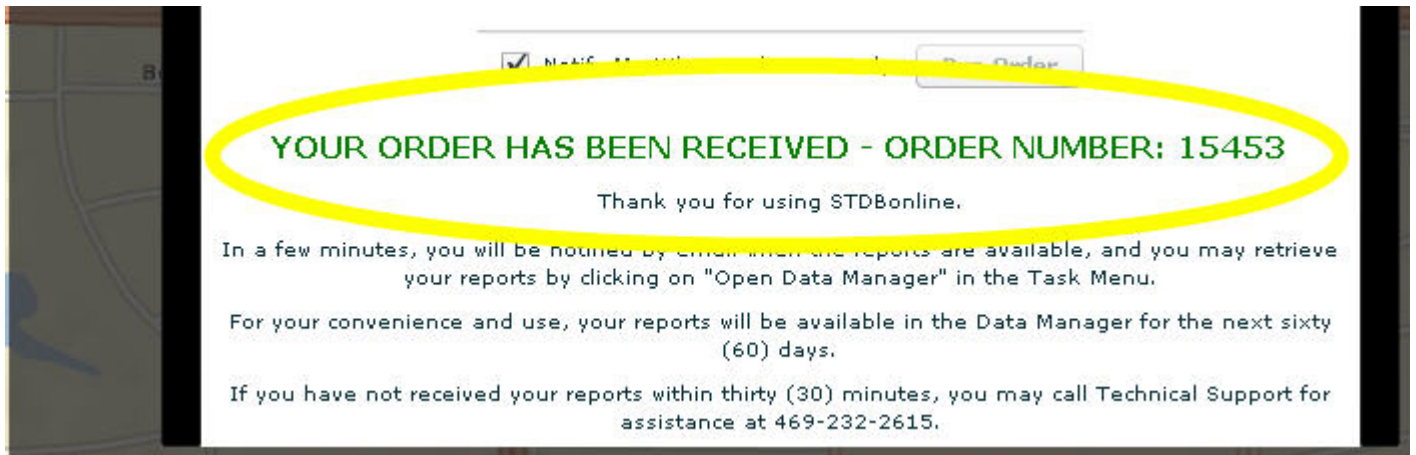
Moache Ave

N Dentwood Dr

Dr

B

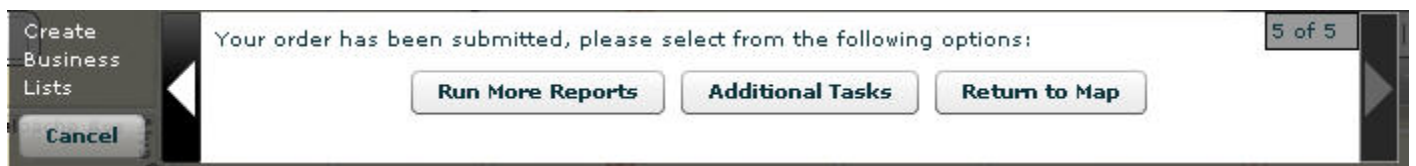
A report order confirmation will immediately appear at the bottom of the navigation box. Report orders will be emailed to users and reports will also be available via the Data Manager.



Click the arrow to the right of the navigation box to proceed to Step 5.

Step 5 of 5: Confirmation message

This step confirms the report order was submitted successfully and provides additional workflows the user may be interested in performing.



Export Filtered Business List (By Business Name, Business Address, Street Range or Standard Geography)

This method consists of five steps and allows the user to generate a filtered business list onscreen with the ability to export results to Excel. It's important to note that results are not limited to a study area, but rather all records available in the database. This method gives you the option to filter results by Business Name, Business Address, Street Range or Standard Geography (City, State and Zip).

After creating a study area, click "Create Business Lists" from the Task Menu on the left. When the workflow begins at the top, click "Run Business List Report (By Study Area)". Instructions for the "Export Filtered Business List" are listed further in the tutorial.



Step 1 of 5: Select database

This step prompts the user to select the desired database to be used when generating the report. Currently, Experian is the only database available.



Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 5: Select business filter (All, By NAICS, By SIC, STDB Favorites)

This step prompts the user to select the desired business filter to be used when generating the report(s). The following four filters are available and described below:

All: All businesses within the selected study area(s) will be included in the report(s).

By NAICS: The **North American Industry Classification System (NAICS)** is used by business and government to classify and measure economic activity in Canada, Mexico and the United States. It was released in 1997 and has largely replaced the older Standard Industrial Classification (SIC) system; however, certain government departments and agencies, such as the U.S. Securities and Exchange Commission (SEC), still use the SIC codes. The NAICS numbering system is a six-digit code. The first five digits are generally (although not always strictly) the same in all three countries. The last digit designates national industries. The first two digits designate the largest business sector, the third digit designates the subsector, the fourth digit designates the industry group, and the fifth digit designates particular industries. If this option is selected, the report will only include businesses that match the selected NAICS codes.

By SIC: The **Standard Industrial Classification (SIC)** is a United States government system for classifying industries by a four-digit code. Established in 1937, it is being supplemented by the six-digit North American Industry Classification System (NAICS). If this option is selected, the report will only include businesses that match the selected SIC codes.

STDB Favorites: STDB has pre-defined a list of popular search criteria, based on NAICS codes. If this option is selected, the report will only include businesses that match the NAICS codes contained within the pre-defined STDB Favorite filter.

Select businesses to include All By NAICS By SIC STDB Favorites 3 of 5

Code	Title	Code	Title
11	Agriculture, Forestry, Fishing, & Hunting	53	Real Estate & Rental & Leasing
21	Mining	54	Professional, Scientific, & Technical Services
22	Utilities	55	Management of Companies & Enterprises
23	Construction	56	Administrative Support, Waste Management & Remediation Services
31-33	Manufacturing	61	Educational Services
42	Wholesale Trade	62	Health Care & Social Assistance
44-45	Retail Trade	71	Arts, Entertainment, & Recreation
48-49	Transportation & Warehousing	72	Accommodation & Food Services
51	Information	81	Other Services (except Public Administration)
52	Finance & Insurance	92	Public Administration

Enter NAICS Code or Name Search

Search Results: Selected NAICS Codes: Remove Selected

NAICS Code	Name

NAICS Code	Name

Once the desired filter is selected, click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 5: Define business attributes (Optional)

This step is optional in the process and allows the user to further define businesses based on additional filter parameters. This filter works well if 'All' businesses was selected from Step 2 above. The following additional filters are available and described below:

Define Business Attributes (Optional) 3 of 5

Fill in any combination of the fields below to define your search. After you have entered values for your fields click the right arrow button to see your results.

Business Name

Street Range

Street

City

State

Zip Code

Instructions:

By Business Name: Insert whole or partial words with an asterisk (e.g. '*'). Address, City, State or Zip are optional fields.

By Business Address: : Insert a specific address number in the first and second box of Street Range, Street, and City & State or Zip.

Example: Street Range

By Street Range: Insert beginning and end number, Street Name, and City & State or Zip.

By Street: Insert Street, and City & State or Zip.

By Standard Geography: Insert City, State or Zip.

Please Note:

You can use any or all of the filters above to refine your search.
The number of records returned will be limited based on your subscription level.

Business Name: Enter a specific business name or partial name with an asterisk (*). Then specify a city, state or zip to further refine your search.

The asterisk acts as a wild card and searches for businesses that contain the partial name in the full business name. (Examples: Home Depot or Hom)*

When using the wild card search feature, the partial name must contain at least 3 characters.

Street Range: Enter the beginning and ending numeric values for the street range. Then specify a street, city, state or zip to further refine your search.

The street range is a very powerful filter and can be used in a variety of ways, which include the following examples:

EXAMPLE 1

Street Range	<input type="text" value="5000"/>	<input type="text" value="6000"/>
Street	<input type="text" value="Sherry"/>	
City	<input type="text" value="Dallas"/>	
State	<input type="text" value="TX"/>	

In Example 1 above, the request will search for all businesses located on Sherry (street, lane, drive, etc.) in Dallas, Texas, between street range numeric values 5000 and 6000.

EXAMPLE 2

Street Range	<input type="text" value="5000"/>	<input type="text"/>
Street	<input type="text" value="Sherry"/>	
City	<input type="text" value="Dallas"/>	
State	<input type="text" value="TX"/>	

In Example 2 above, the request will search for all businesses located on Sherry (street, lane, drive, etc.) in Dallas, Texas, with a street range equal to or greater than 5000.

EXAMPLE 3

Street Range	<input type="text"/>	<input type="text" value="5000"/>
Street	<input type="text" value="Sherry"/>	
City	<input type="text" value="Dallas"/>	
State	<input type="text" value="TX"/>	

In Example 3 above, the request will search for all businesses located on Sherry (street, lane, drive, etc.) in Dallas, Texas, with a street range equal to or less than 5000.

EXAMPLE 4

Street Range	<input type="text" value="5950"/>	<input type="text" value="5950"/>
Street	<input type="text" value="Sherry"/>	
City	<input type="text" value="Dallas"/>	
State	<input type="text" value="TX"/>	

In Example 4 above, the request will search for all businesses located at 5950 Sherry (street, lane, drive, etc.) in Dallas, Texas.

Street: Enter a specific street name or partial name with an asterisk (*). Then specify a city, state or zip to further refine your search.

The asterisk acts as a wild card and searches for streets that contain the partial name in the full street name. (Examples: Sherry or She)*

When using the wild card search feature, the partial name must contain at least 3 characters.

City: Enter a specific city name. Then specify a state or zip to further refine your search.

The wild card search feature does not work for this field.

State: Enter the specific two-digit value for state.

(Examples: CA, AZ, TX)

Zip: Enter the specific five-digit value for zip code.

(Example: 92373)

Once the desired filters are selected, click the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 5: View and export results

This step displays search results in an on-screen table, based on the filter parameters selected in Steps 2 & 3 above. The maximum number of search results returned is 2,000 records, but may be even less, based on pre-defined STDB membership levels. Users have the ability to peruse results in the table to determine if they are satisfied with the records. If not, users can easily rerun the search query by hitting the back arrow and redefining the parameters in Step 3. Once the user is satisfied with their query results, results can be exported to excel by selecting the 'Export to Excel' button at the bottom right corner of the navigation box. This process can be repeated as many times as desired.

It's important to note that query results generated in this workflow are not saved in the Data Manager.



The screenshot shows a table with 5 columns: Name, Address, City, State, and Zip. The table contains 20 rows of business records. A navigation bar at the bottom right features a left-pointing arrow, a right-pointing arrow (circled in yellow), and an 'Export to Excel' button (also circled in yellow). A red arrow points from the 'Export to Excel' button to the right-pointing arrow. The text '4 of 5' is visible in the top right corner of the table area.

Name	Address	City	State	Zip
BISIGNANO & HARRISON LLP	5949 SHERRY LN	DALLAS	TX	75225
AUTOCORP EQUITIES	5949 SHERRY LN	DALLAS	TX	75225
TURNAGE & CO PC	5949 SHERRY LN	DALLAS	TX	75225
LAW OFFICES OF JOE H STALEY JR	5949 SHERRY LN	DALLAS	TX	75225
THOMAS V RANNELLS	5949 SHERRY LN	DALLAS	TX	75225
SOUTHWEST INVESTMENT MGMT	5949 SHERRY LN	DALLAS	TX	75225
EAGLE LEASING AND INVESTMENT C	5949 SHERRY LN	DALLAS	TX	75225
WARD CAPITAL LP	5949 SHERRY LN	DALLAS	TX	75225
CENTRAL PARK VIDEO LTD	5949 SHERRY LN	DALLAS	TX	75225
FELIX MIKE DORAN	5949 SHERRY LN	DALLAS	TX	75225
MICHAEL A ONEIL PC	5949 SHERRY LN	DALLAS	TX	75225
SHERRY LANE DELI	5949 SHERRY LN	DALLAS	TX	75225
WATERFORD CAPITOL	5949 SHERRY LN	DALLAS	TX	75225
MCKITTRICK CYN EXPLORATION C	5949 SHERRY LN	DALLAS	TX	75225
LAW OFFICE OF LARRY M LESH	5949 SHERRY LN	DALLAS	TX	75225
CEREBIS LLC	5949 SHERRY LN	DALLAS	TX	75225
URBAN AMERICAN ASSET MANAGEM	5949 SHERRY LN	DALLAS	TX	75225
HAWN FOUNDATION INC	5949 SHERRY LN	DALLAS	TX	75225
LAZARUS PROPERTY CORP	5949 SHERRY LN	DALLAS	TX	75225
PALO VERDE OIL CO	5949 SHERRY LN	DALLAS	TX	75225

Once the user is finished querying businesses, click the arrow to the right of the navigation box to proceed to Step 5.

Step 5 of 5: Confirmation message

This step confirms the search query was generated successfully and provides additional workflows the user may be interested in performing.