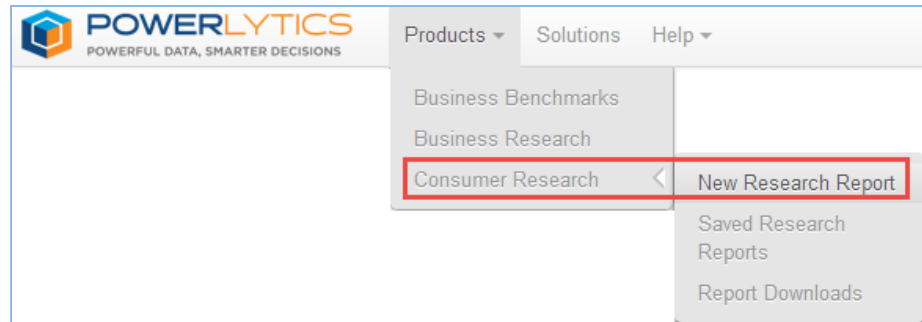


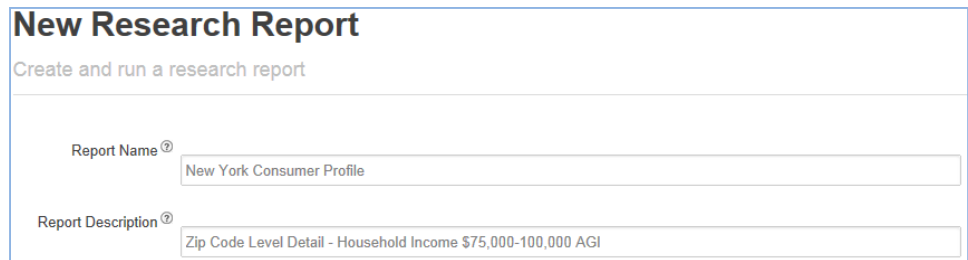
Quick Start Guide – Creating a New Consumer Research Report

The following steps detail how to create a Consumer Research report.

1. Under Products on the top menu bar select Consumer Research – New Research Report. Before a report can be saved or submitted all field selections must be complete.

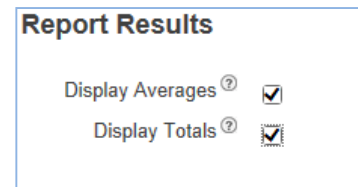


2. Enter a report title and description.



The screenshot shows the 'New Research Report' form. The title is 'New Research Report' and the subtitle is 'Create and run a research report'. There are two input fields: 'Report Name' with the value 'New York Consumer Profile' and 'Report Description' with the value 'Zip Code Level Detail - Household Income \$75,000-100,000 AGI'.

3. Report Results – Select Display Averages and/or Display Totals. Line item amounts can be displayed by average and/or in the aggregate for households in the selected geographic area.



The screenshot shows the 'Report Results' section. It contains two checkboxes: 'Display Averages' and 'Display Totals', both of which are checked.

4. Research Report Settings – Select one or more Forms and/or schedules.

Research Report Settings

Select one or more boxes below...

Select All

Form 1040 [?]

Schedule A [?]

Schedule C [?]

Schedule D [?]

Schedule E [?]

Schedule SE [?]

Other Forms [?]

Return Statistics [?]

5. Report Year – Select year from which to begin query. Report will include data from year selected through 2004.

Report Year

Year [?]

Report will contain data from 2004 thru the selected year.

6. Adjusted Gross Income – Select income range(s).

Adjusted Gross Income

Income range [?]

- All available
- Under \$10,000
- \$10,000 to \$25,000
- \$25,000 to \$50,000
- \$50,000 to \$75,000
- \$75,000 to \$100,000
- \$100,000 to \$200,000
- \$200,000 or more

7. Geographic Region – Select preferred report output detail level and begin typing in the Geographic Area search box to generate location options, or click the Search button to display all locations available at that level. (The display all option is available for only the US through County level due to the large volume of U.S. zip codes.) Select desired locations from the Search Results box and click the Add Selected button to complete report selections. Geographic locations can be removed with the Remove Selected button.

Example: Select Zip Code, search New York, select New York County and report will include New York County household data detailed by zip code.

Additional geographic areas can be added, but must be at the same or a more detailed level than those already included.

Geographic Region

Report Output Detail [?]

- US
- Census Region
- Census Division
- State
- MSA
- County
- Zip Code

Enter Geographic Areas to search i.e. state or county name [?]

Search Results (select your desired geography) [?]

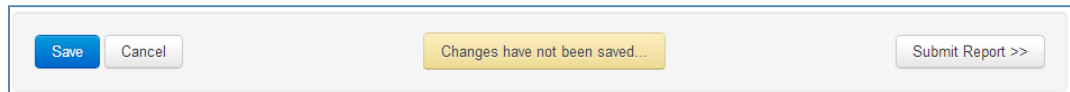
State	New York
MSA	New York-Northern New Jersey-Long Island, NY-NJ-PA Metropolitan Statistical Area
County	New York County, NY

Selected Geography [?]

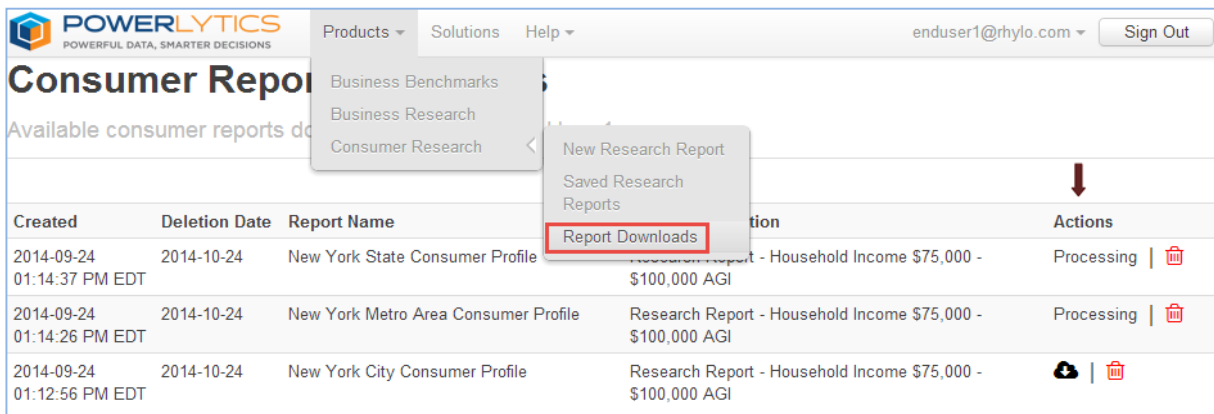
New York County, NY

8. Save Selections and Submit Research Report request:

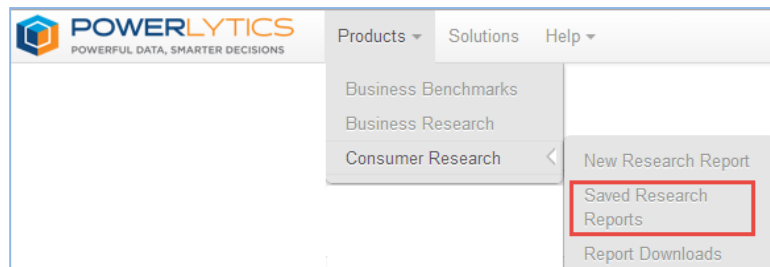
- Click the save button to save the selections. Before the report can be saved or submitted all fields selections must be complete.
- Click Submit Report to generate Research report based on selections. When the Research report is complete a notification email including a link to access the report will be sent.



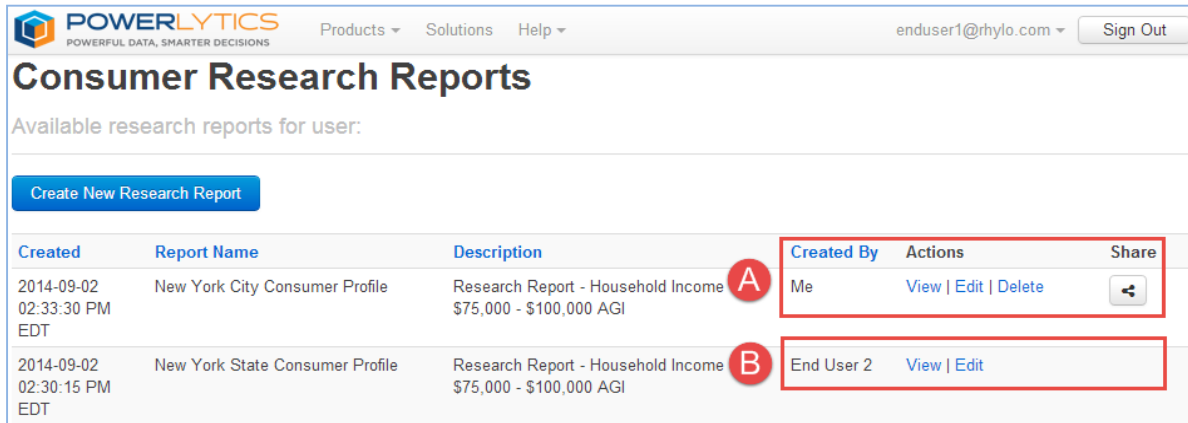
9. Download and check status of Consumer Research Reports – Under Products on the top menu bar select Consumer Research – Report Downloads. Report processing time is dependent on the size of dataset and the overall number of queries. The download will be a .ZIP file including the report as a .CSV file. Reports with less than 10 individuals are not available due to privacy regulations and will be labeled No Results in the Action column. To include additional companies, edit the report query to expand the parameters, and then resubmit the report. *Research report files will remain available to download for 30 days.*



10. To access Consumer Research reports for review and sharing, under the Products on the menu bar select Consumer Research – Saved Research Reports.



- On the Consumer Research Reports page all research reports, created by or shared with the user, are available for review. The creator of the report is automatically assigned ownership permissions which enable them to share the report with other users in the corporate account.




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Consumer Research Reports

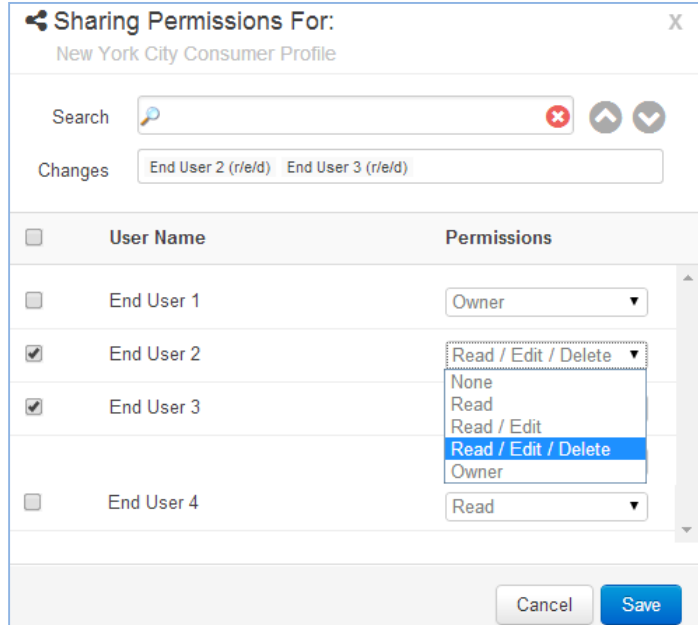
Available research reports for user:

Create New Research Report

Created	Report Name	Description	Created By	Actions	Share
2014-09-02 02:33:30 PM EDT	New York City Consumer Profile	Research Report - Household Income \$75,000 - \$100,000 AGI	Me	View Edit Delete	
2014-09-02 02:30:15 PM EDT	New York State Consumer Profile	Research Report - Household Income \$75,000 - \$100,000 AGI	End User 2	View Edit	

- Actions** – These options are specific to each Consumer report. The user who created the Consumer Report, as well as all Administrators, has view, edit, delete and share options **A**. Consumer Report Items **B**, created by other users but shared with this user, will be included in the list but may have limited Action options. The View Action option will open a read-only version for review, then using the Save As button the user can save a copy under a new name to own, edit and share. The Sharing Permissions Control detailed below determines the Action options available for a Consumer report.
- Share** – A Consumer report owner can share a Consumer report with other users to allow or remove view (read), edit, delete and ownership permissions. A Consumer report can have more than one owner.

12. To share a Consumer Report, click the Share button  to view the Sharing Permissions Control.



The screenshot shows a dialog box titled "Sharing Permissions For: New York City Consumer Profile". It features a search bar, a "Changes" box containing "End User 2 (r/e/d)" and "End User 3 (r/e/d)", and a table with columns for "User Name" and "Permissions".

<input type="checkbox"/>	User Name	Permissions
<input type="checkbox"/>	End User 1	Owner
<input checked="" type="checkbox"/>	End User 2	Read / Edit / Delete
<input checked="" type="checkbox"/>	End User 3	Read / Edit / Delete
<input type="checkbox"/>	End User 4	Read

At the bottom of the dialog are "Cancel" and "Save" buttons.

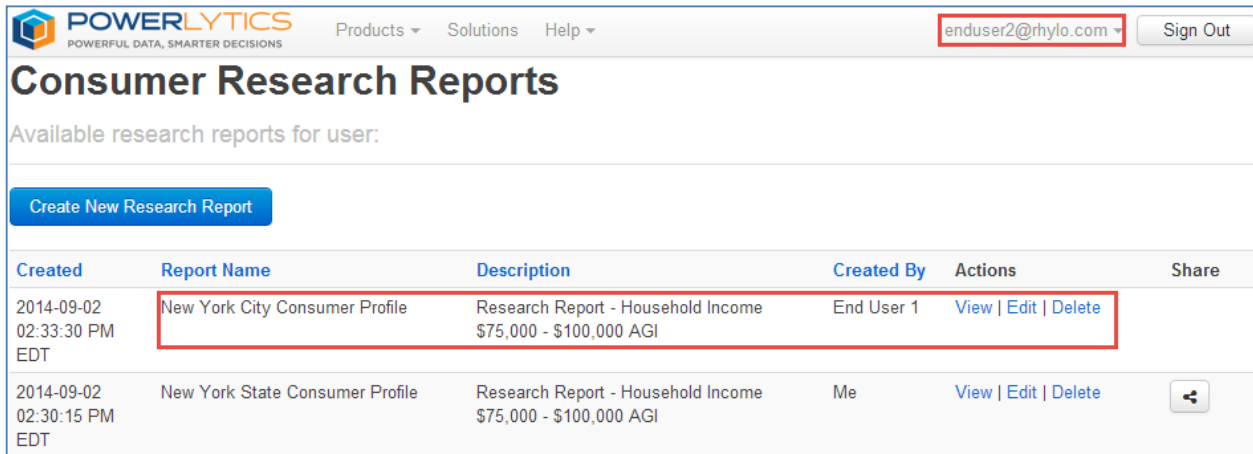
13. Search for a single user or select multiple users directly from the User Name list, and use the Permissions drop-down menu to set desired sharing privileges. **Permissions chosen for one user in the list will apply to all other users with the check box checked.** Use the arrow buttons to easily scroll through all available user names. As the permission is updated for each user, their name will appear in the Changes box with details of the change in parentheses. User names in the Changes box are clickable for quick navigation and permissions editing. Permissions are cumulative as follows:

- Owner = read (view), edit, delete, share permission and ability to assign additional owners
- Read/Edit/Delete = view, edit and delete permission only
- Read/Edit = view and edit permission only
- Read = view only permission
- None = the user cannot see or access the item

Example Above – End User 1 is an owner of the Consumer Report, New York City Consumer Profile, and as such can set the sharing permissions for other users on their account. In the Changes box, *End User 2 (r/e/d)* shows that this end user now has read, edit and delete capabilities. Because End User 3 is also selected, the same permissions were automatically set. With this permission update, all changes End User 2 or End User 3 make to the New York City Consumer Profile will be reflected on all other user accounts, such as End User 4, that have access to the New York City Consumer Profile report.

14. Click the Save button. The updated permissions to this research report will be reflected when a user signs in to the product or refreshes their Research Reports page.

Example Below – On the **End User 2** Consumer Research Reports page, the Actions column for the **New York City Consumer Profile** report now includes view (read), edit and delete.



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Consumer Research Reports

Available research reports for user:

Create New Research Report

Created	Report Name	Description	Created By	Actions	Share
2014-09-02 02:33:30 PM EDT	New York City Consumer Profile	Research Report - Household Income \$75,000 - \$100,000 AGI	End User 1	View Edit Delete	
2014-09-02 02:30:15 PM EDT	New York State Consumer Profile	Research Report - Household Income \$75,000 - \$100,000 AGI	Me	View Edit Delete	