



Custom Reports – How to generate a homeowner mailing list to include account numbers and other additional information.

Create your own custom report under “Reports”, “Custom Reports”.

[Homeowners](#) [Vendors](#) [Banking](#) [Accounting](#) [CCR](#) [Management](#) [Reports](#)

Custom Reports

[+ New](#) [Delete](#) [Preview](#) [Excel](#) [Refresh](#) [Cancel](#)

Dashboard

No Active Misc Info Fields

Report	Area	Type
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Hit “New”, select the type of report you want and give it a name. Select “View Parameters” and check off the information you want to include on the list and give them an order number.

Custom Report Parameters

[Save](#) [Cancel](#)

Dashboard

Save as Homeowner Mailing List with Account #

Reports Custom Homeowner Information [View Parameters](#)

Sort Order	Column Order	Column	Sort Order	Column Order	Column
1		☒ Primary Homeowner			☐ 2nd Homeowner
		☐ Address Type			☐ Street No
2		☒ Address 1			☐ Address 1 Plus Unit
3		☒ Address 2	4		☒ City
5		☒ State	6		☒ Zip

Add three additional parameters at the bottom by selecting “new”. Choose “Association Code”, “equals”, and then enter your property number (to run your report for a different property, just use the same report and enter another property number before exporting it).

☐ Association Code equals test

☐ Address Type contains physical

☐ Homeowner Status does not contain pr

[New](#) [Delete](#)



Hit save at the top and return to the bottom to enter another “new” parameter.

Hit “new” and then choose “Address Type”, “contains”, and “physical” to avoid including additional offsite addresses in your list. Hit save and enter the last parameter, “Homeowner Status” “does not contain” “Pr” to exclude any prior owners. Save and then cancel to return to the “Custom Reports” page.

Custom Reports

+ New Delete Preview Excel Refresh Cancel Dashboard

No Active Misc Info Fields

Report	Area	Type
☐ Custom Report	Standard	Custom Homeowner Information
☒ Homeowner Mailing List with Account #	Standard	Custom Homeowner Information

Select your report and either preview or export the report to Excel. It will then be downloaded to your browser for use.