



Downloading Lead Information

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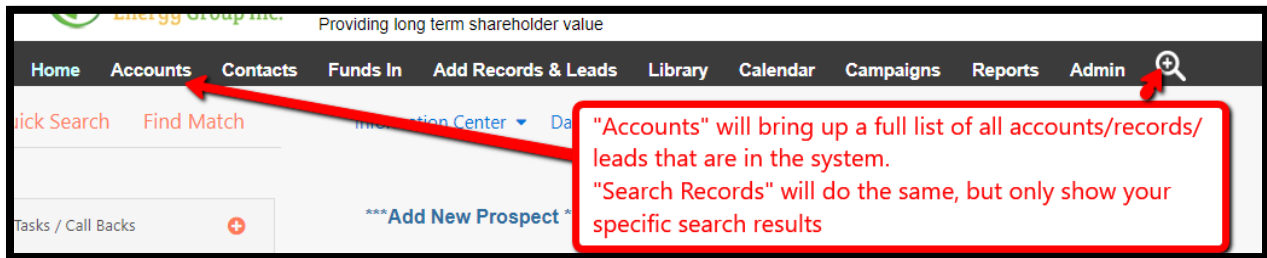
The ability to download is a "privilege" so only those users who are given that ability will be able to do so.

There are two ways to download Lead Information.

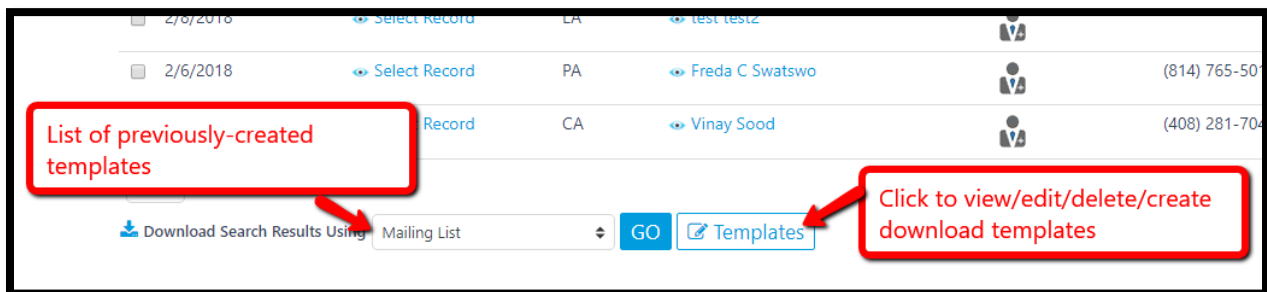
1. From the Accounts List or Search Records results
2. From a report (custom or otherwise)

DOWNLOADING FROM THE ACCOUNTS LIST

Go to a list of Accounts/Records/Leads via a search, or the full Accounts list



Once you pull up that list, scroll all the way to the bottom of the page and you'll see "Download Accounts/Search Results Using" with a dropdown next to it. The Dropdown lists all previously made Download Templates. If you have one you can select it and click "Go" to immediately use it. Otherwise, you can click "Templates" for a list of the templates and ability to edit them or create your own.



The Templates screen:

Manage Download Templates

[Add Download Template](#) [Help Guide](#) **Create your own**

Download Template Name	Created By	Is Public	Has Form	
Basic Fields	n/a	n/a	n/a	view
Mailing List	n/a	n/a	n/a	view
Archived Info (H2 - M-K Trucking)	Chris Midgett	No	No	edit delete
Birthday (JL - Blue Ribbon)	Chris Midgett	No	Yes	edit delete
ContactStatus (BJ - Interstates)		No	No	edit delete
Record Append (BJ - Interstates)		No	No	edit delete
Record Number and Company (AB - Chris - Sandbox New)	Chris Midgett	No	No	edit delete
Temp State Fix (BJ - Interstates)	Chris Midgett	No	No	edit delete

Edit existing

[Proceed To Download](#) [Close](#)

Click "Add Download Template" to create your own. The screen will allow you to name it, and select the fields you want to download. Click "Save Changes" to save your template for use.

Name

☐ Is public for JL - Meridian Energy Group

☐ CLM Formatting I (replace carriage return with space)

☐ CLM Formatting II (concatenate custom form internal responses)

Fields [Select All](#) | [Clear All](#)

<input type="checkbox"/> Workgroup	<input type="checkbox"/> Prefix
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Last Name
<input type="checkbox"/> title1	<input type="checkbox"/> Cell Phone
<input type="checkbox"/> Work Phone	<input type="checkbox"/> fax_phone
<input type="checkbox"/> Email	<input type="checkbox"/> Record No.
<input checked="" type="checkbox"/> Company	<input checked="" type="checkbox"/> Address 1
<input type="checkbox"/> address2	<input type="checkbox"/> address3
<input type="checkbox"/> City	<input type="checkbox"/> State
<input type="checkbox"/> Zip	<input type="checkbox"/> Country

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

After clicking "Save Changes" You'll be asked if you want to download additional information from custom forms. This allows you to include fields from custom forms the same way you are able to "search" for custom forms. Simply select yes or no. If "Yes" then select the form from which you want to download, click "Retrieve Selected Custom Form(s)," and then select the fields you want to download. Once selected, click "Save Changes"

Save Changes **Cancel**

Select Additional Download Fields

Custom Forms

<input type="checkbox"/> Action Request	<input type="checkbox"/> Allocated Shares
<input type="checkbox"/> Book Numbers	<input type="checkbox"/> CONTACT
<input type="checkbox"/> Enhancement Spec Detail Form	<input type="checkbox"/> CUSTOMFIELDS - Accounts
<input type="checkbox"/> CUSTOMFIELDS - Accounts	<input type="checkbox"/> Mailing Labels
<input type="checkbox"/> Not Interested	<input type="checkbox"/> OPPORTUNITY
<input type="checkbox"/> Prospect Entry	<input type="checkbox"/> Prospect Entry - 1 - HTML
<input type="checkbox"/> Prospect Entry InLine	<input type="checkbox"/> Send info:
<input type="checkbox"/> Update Contact Information	

Retrieve Selected Custom Form(s) Check the form(s) you wish to include and click 'Retrieve Selected Form(s)'

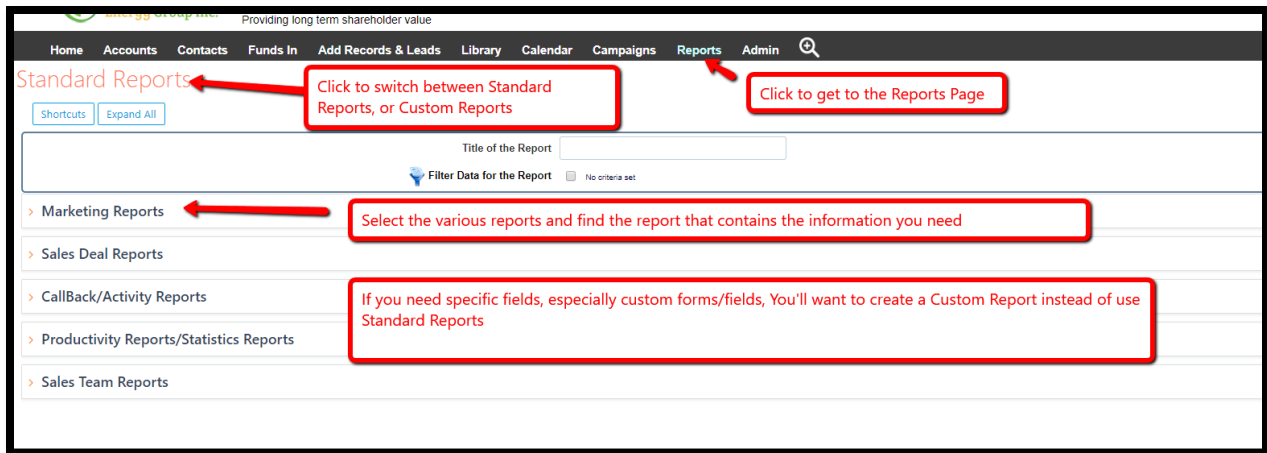
Save Changes **Cancel**

You'll be brought to the list of Templates. "Click "Proceed to Download" and select your new template from the dropdown. You may then be asked if you want to include only the contacts that meet search criteria, or all the contacts. The default selected (top) is almost always what you need. The next screen will ask about duplicates. Usually, you want to leave duplicates in the download for a true download of what is in the system.

Then you are on your way to downloading the list of fields you selected!

Note: This route of downloading accounts does not always allow for **every** field to be downloaded. So if you don't see the field you need, you'll have to create a custom report that includes the field and download the report as explained in #2 below

DOWNLOADING FROM A CUSTOM REPORT



When you select a report, you'll be asked if you want to filter the report. This basically asks if you want to only report on specific accounts/records/leads based on a search criterion (i.e. Everyone from the state of Louisiana perhaps). If you want all accounts/records/leads, simply select "No."

Once you're viewing the report, select the "Options" button and choose "Download Report"



HOW TO CREATE A CUSTOM REPORT FOR DOWNLOADING

From the Reports Page, click the header "Standard Reports" and select the "My Reports" from the dropdown.



From this new screen you'll see a list of the custom reports that have been made thus far. Click "Add Custom Report" at the top of the screen.

On this screen you can name your custom report, select what you are reporting on (Accounts, Contacts, Deals, et.al.), and whether it's public or only seen by you alone. Click Next when you're done.

The next screen shows the available **system/standard** fields available to add to a report. Select the fields you want, and click the middle arrows to either add or remove from the report. The right box shows the fields in your report. And the right-most arrows allow you to re-order the fields in the report. Click Next when you're happy with what you have.

The next page asks what to sort by in your report. You need at least a Primary Sort. Click next after selecting.

This next page gives you the option to add Custom Form Fields. This is where you'll find your custom forms and fields as in the search and downloads previously discussed. Select Yes or No then click Next.

If “Yes” the next screen lets you choose the fields you want in your report in the same fashion as searching custom forms

Design Report - Select Custom Form Fields

Reports

STEP 1 - Choose the custom form(s) to display

☐ Web ☐ Supplemental
☐ Sales ☐ Feedback
☐ Opportunity ☐ Custom Fields
☒ Smart

Select the type of form

STEP 2 - Select the custom form you wish to select the fields from

HT - Prospect Entry - 1

Select the form

Retrieve Select Custom Form

Click "Retrieve Select Custom Form"

If multiple custom forms exist on the record do you want:

☒ Only the most recently updated form
☐ All forms on the record

When finished, click "Next" to add your field selection.

Back Next Cancel

Form #1 Prospect Entry - 1

Prospect / Investor Information

☐ Send action req: Resend PPM # Increase Statement Fed Ex Label Tracking # NDA Deck Subscription Agreement IRA Docs Webinar Financials Allocation Statement

Choose what fields you want in your report

Once you’ve selected your fields, click next to save the report.

You should now see your report in the list under “My Custom Reports” and can run the report, and then download the report which now contains the exact fields you want to download.

Your download will separate each field into its own column, as shown below:
Each Row is an Account/Record/Lead. Each Column is a field

	B	C	D	E	F	G	H	I
1	Project ID	Project Value	Category	Street Address	City	General Contractor Company	General Contractor Phone	Architect Company
2	163524	63000000	Apartments	1825 Tulane	Atlanta	Thare Namase	123.456.7890	Yor Company
3	199923	30000000	Business	To be announced	Marietta	Itsa Me	555-555-Peach	Toad's Stools
4	200028	60000000	Non-profit	Bermuda Triangle Lane	Houma	Gorilla Jane	800.Big.Tree	Zookeepers Island