

Search, List, and Export Leads

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Watch a (1:00) video tutorial on Searching, Listing & Exporting Leads

List Leads

Create a listing of all leads by going to **Families > Lead File** and selecting **List All Leads** from the menu on the left.

Search Leads

Search the Lead File by going to **Families > Lead File** and selecting **Search Leads**. Use the criteria choices to search the Lead File for families that match your selected criteria.

Export Leads

Export data out of the Lead File (for example, to Excel) by going to **Families > Lead File** and selecting **Export Leads** from the menu on the left. In the **Export (Save)** pop-up, choose a format. Save this to your computer.
