

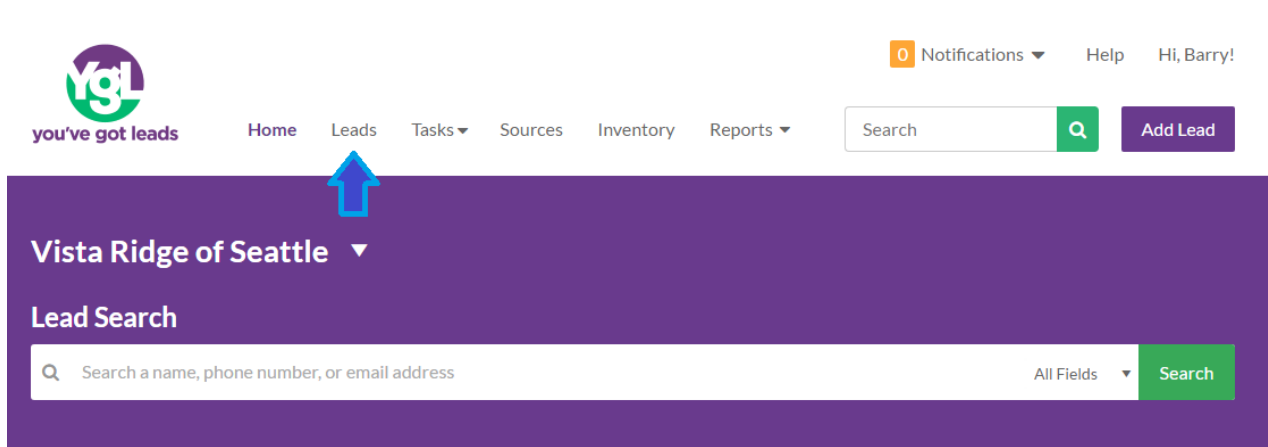


# YGL 3.0 // The Basics

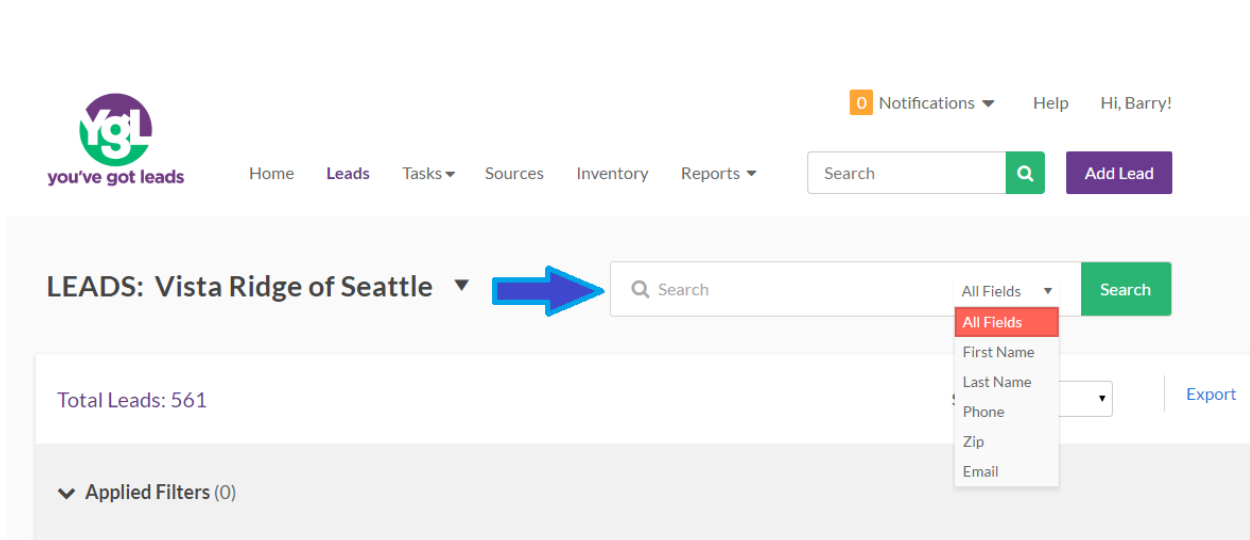
Thank you for your continued support of You've Got Leads! The following document is intended to help with the many features of the program. Each community may have different features that are not expressed in this manual. If you find that your issue cannot be resolved by the instructions below, please reach the support team by emailing at [support@ygl.zendesk.com](mailto:support@ygl.zendesk.com)

# How to Create a New Lead

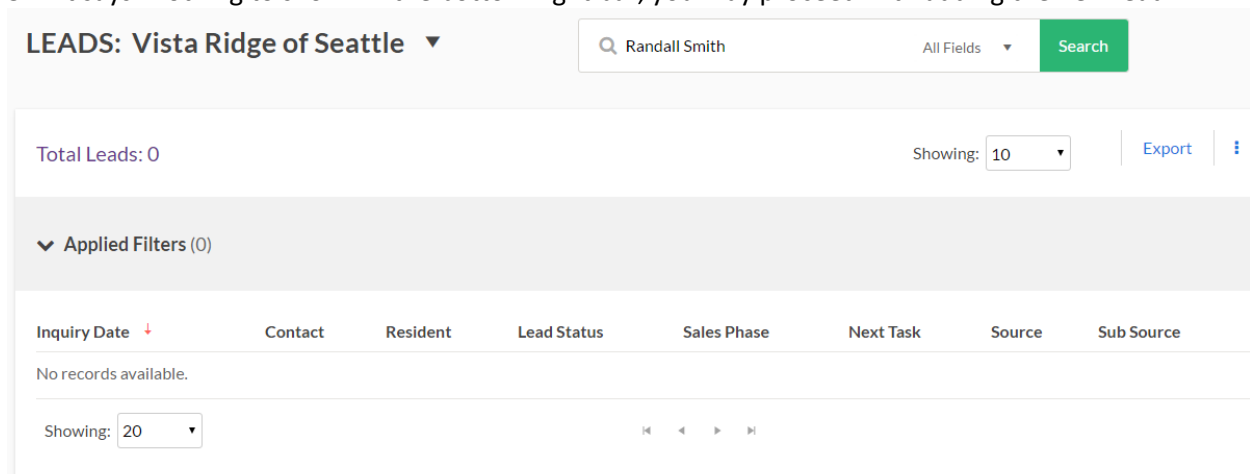
1. In the You've Got Leads (YGL) website, select the "Leads" tab at the top of the screen.



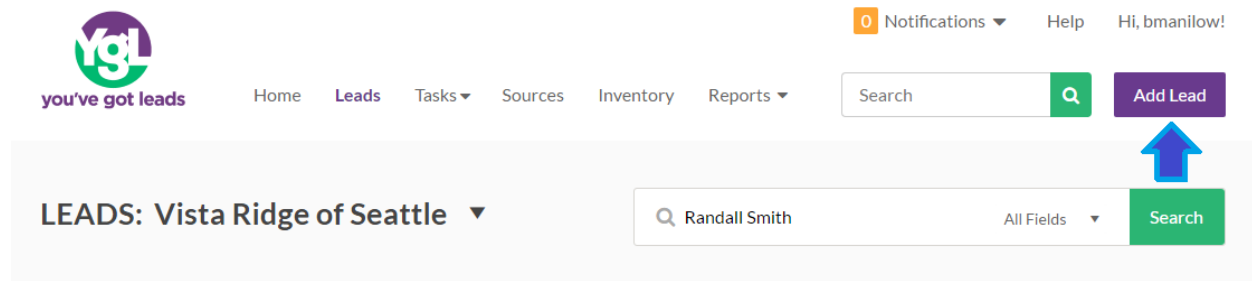
2. Type the first and last name of the potential lead within the lead search bar. This is to avoid any duplicates of leads entered. If a lead has been duplicated, the newer lead will have to be deleted and the newest information added to the older profile. You can also look for leads by phone number, zip code, and email address.



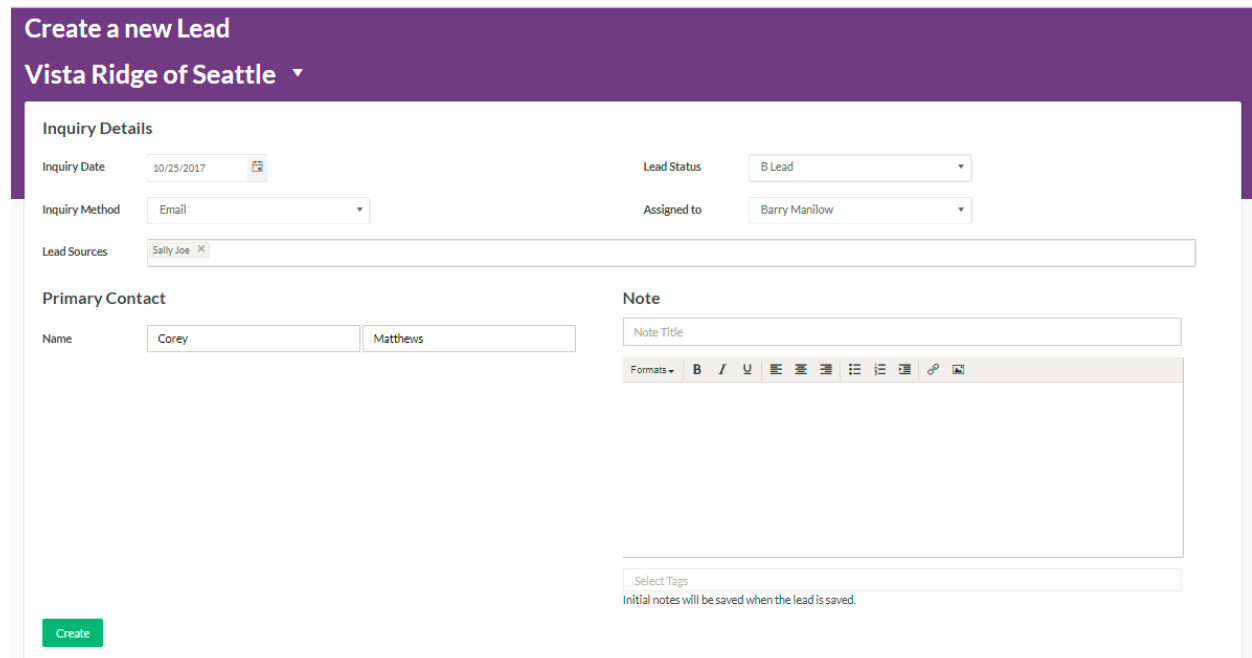
3. If it says "nothing to show" in the bottom right bar, you may proceed with adding the new lead.



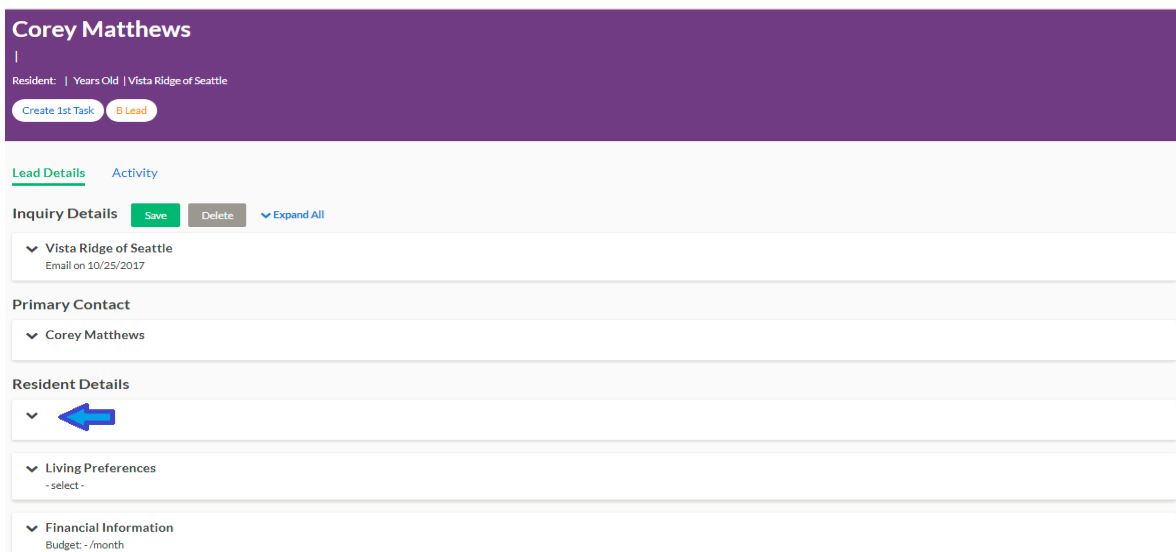
4. You are now ready to create a new lead! Select “Add Lead” in the top right of the screen.



5. The following fields are available to help paint the picture of who your lead. The Inquiry Details and Primary Contact are fields to simply learn about how your lead found out about your community and who your lead is. Once you've completed this, select “Create” to proceed.



6. You will be then taken to your new lead's profile page where you can fill out the remaining information about your lead. You will see small arrows pointing down within each category of your lead's profile page (Inquiry Details, Primary Contact, Resident Details, etc.). By selecting that arrow, a menu will expand to fill out information within that category.



Although not all of the boxes are required, the more information you can capture, the better! This profile can be edited at a later time if you receive more information about your lead.

Resident Details

^

Name   Phone  Home  Preferred  
 Work  Preferred  
 Mobile  Preferred

Address  
Address1   
Address2   
City   
State   
ZIP Code   
Country

Email   Preferred  
Allow Contact?  Yes  
Mailing List  Yes

Personal Details  
Gender   
Age    
Marital Status   
Living Situation


7. Once all the information has been entered, click the “save” button at the top of the form.

Personal Details  
Gender   
Age    
Marital Status   
Living Situation

Health Status  
Disable Injections  Yes  
Memory Loss   
Ambulation

Assistance Needed

	Full Time	Part Time	Never
Medication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dressing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shaving, Hair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bathing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Toileting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Eating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Laundry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save 

Helpful tips and tricks:

- **DO** continually add information into the person’s profile.
- **DON’T** forget to search through your current leads before adding a new one!
- **DO** record important conversations with the lead in the notes section.
- **DON’T** delete a lead! They might come back to you at a later time and it’s helpful to have their information from the previous visit. Instead of deleting the lead, add a “Move in” or “Close-Lost Lead” task to the lead. You can always alter that task if the lead comes back to your community/property. This is very important, especially in tracking leads that were successful versus unsuccessful.

## DO THIS:

**Corey Matthews**  
Resident: | Years Old | Vista Ridge of Seattle

Closed - Lost Lead B Lead

Lead Details Activity

Tasks (2) Showing: 10 Calendar New Task

Due Date	Task Type	
Today	Close - Lost Lead	
Oct 17	Email	

Notes (1) New Note

Filter By

Wed, 10/25/17  
Written By: agibb  
LEAD ADDED

Previous 1 Next

## How to Check for Duplicate Leads

1. It is best to check for duplicates before saving your new lead. To check for duplicates, select the Duplicate Check icon at the top next to the lead's name.

**you've got leads** Home Leads Tasks Sources Inventory Reports

0 Notifications Help Hi, Randy!

Search Add Lead

**Leonard Hofstader**  
(206) 745-2626 | lhofstader@mail.com  
Resident: Penny Hofstader | 59 Years Old | Vista Ridge of Magnolia

Post-Tour A Lead

Lead Details Activity

Inquiry Details Save Delete Expand All

Vista Ridge of Magnolia  
Email on 02/20/2018

2. A new window will pop up. If you have not yet saved the lead and you have a duplicate, you will see an entry listed that matches the one you are trying to create. If you have already saved the lead and you have a duplicate lead, it will display at least two rows, the lead you are checking and it's duplicate.

**Duplicate Lead Check** ✕

Below you will see a grid that shows possible duplicates of this lead. The first row is the current lead and the subsequent rows show possible duplicates, if any. You must save any changes to the lead before using the duplicate lead check to get the most accurate results. Last Name of the primary or resident contact is required. Only the primary contact and resident contact information is used to detect possible duplicates.

Show Both
  Show Primary Contact
  Show Resident Contact

**Primary Contact**

First Name	Last Name	City	State	Work Phone	Email	Created On	Source
Shawn	Kemp	Seattle	WA		lhofstader@mail....	02/21/2018	Internet
Shawn	Kemp	Seattle	WA			12/07/2016	Internet

⏪ ⏩ 1 ⏪ ⏩ 1 - 2 of 2 items

If you already saved the lead and there is not a duplicate, it will display the lead you are checking.

**Duplicate Lead Check** ✕

Below you will see a grid that shows possible duplicates of this lead. The first row is the current lead and the subsequent rows show possible duplicates, if any. You must save any changes to the lead before using the duplicate lead check to get the most accurate results. Last Name of the primary or resident contact is required. Only the primary contact and resident contact information is used to detect possible duplicates.

Show Both
  Show Primary Contact
  Show Resident Contact

**Primary Contact**

First Name	Last Name	City	State	Work Phone	Email	Created On	Source
Leonard	Hofstader	Seattle	WA		lhofstader@mail....	02/21/2018	Internet

⏪ ⏩ 1 ⏪ ⏩ 1 - 1 of 1 items

No duplicates found

- If you have found a duplicate that you have already created, select the “delete” button on the profile you have just created. Alternatively you can select the name of the lead in the duplicate lead check window to delete the other.


## How to Create a New Task

- Open the lead profile of the person you would like to create a new task for. Select “Activity” in the blue text to bring up your lead’s task manager page.

**Corey Matthews**

Resident: | Years Old | Vista Ridge of Seattle

[Pre-Tour](#)
[B Lead](#)

[Lead Details](#)
[Activity](#) 

**Inquiry Details** [Save](#) [Delete](#) [Expand All](#)

▼ Vista Ridge of Seattle  
 Email on 10/25/2017

**Primary Contact**

▼ Corey Matthews

2. You will be taken to the task page with more information about your lead. Select “New Task.”

**Corey Matthews**  
Resident: | Years Old | Vista Ridge of Seattle

Pre-Tour B Lead

Lead Details Activity

**Tasks (1)** Showing: 10 Calendar **New Task**

Due Date	Task Type	Priority	Owner	Details
Oct 17	Email	Med	AGibb	Community Introduction

Previous 1 Next

**Notes (2)** New Note

Filter By

Wed, 10/25/17  
Written By: agibb  
10/25/2017 21:04:06 agibb deleted task - Close - Lost Lead - - 10/25/2017 8:54:00 PM - complete

3. When selecting “New Task” a drop down menu will appear with the type of task you would like to create.

**Corey Matthews**  
Resident: | Years Old | Vista Ridge of Seattle

Pre-Tour B Lead

Lead Details Activity

**Tasks (1)** Showing: 10 Calendar **New Task**

Due Date	Task Type	Priority	Owner	Details
Oct 17	Email	Med	AGibb	Community Introduction

Previous 1 Next

**Activity Log**  
AGibb created lead Oct 26 2017  
AGibb changed the lead status from Create 1st Task to No Contact Made Oct 26 2017  
AGibb changed the lead status from No Contact Made to Pre-Tour Oct 26 2017  
AGibb changed the lead status from Pre-Tour to No Contact Made Oct 26 2017  
[Show More](#)

**Notes (2)** New Note

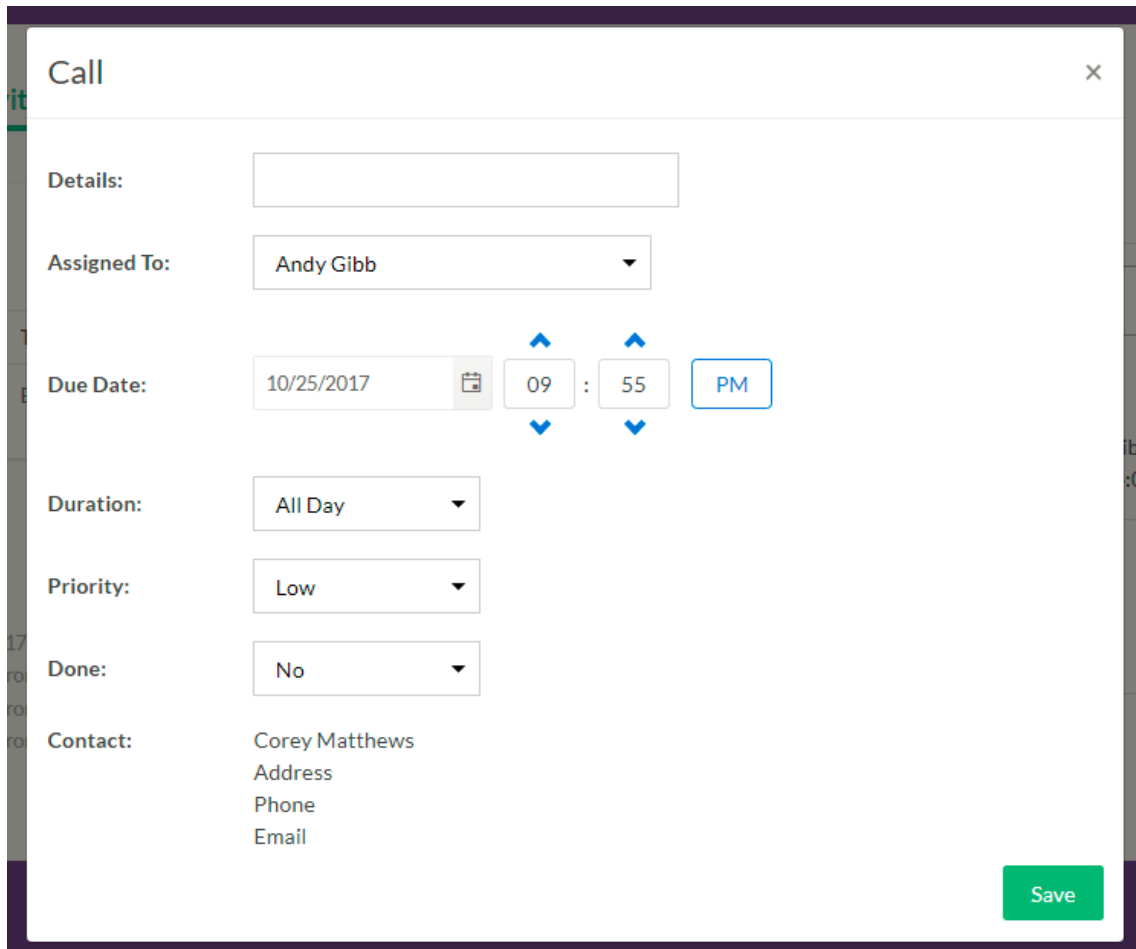
Filter By

Wed, 10/25/17  
Written By: agibb  
10/25/2017 21:04:06 agibb deleted task - Close - Lost Lead - - 10/25/2017 8:54:00 PM - complete

Wed, 10/25/17  
Written By: agibb  
LEAD ADDED

- Call
- Mail
- Email
- Fax
- Tour
- Home Visit
- Deposit
- Assessment
- Move In
- Transfer
- Move Out
- Close - Lost Lead
- Other
- Call-in

4. Once you've selected the type of task you would like to create, a box will appear with blank fields that will allow for you to fill out more information about the task you are creating: details on the task, who this task is assigned to, the due date and time, the duration of how long this task will take to complete, the priority, and if the task is completed (done) or not. Click "Save" to save your created task!



The screenshot shows a 'Call' task creation form with the following fields and values:

- Details:** A blank text input field.
- Assigned To:** A dropdown menu with 'Andy Gibb' selected.
- Due Date:** A date picker showing '10/25/2017', a time picker showing '09 : 55', and a 'PM' button.
- Duration:** A dropdown menu with 'All Day' selected.
- Priority:** A dropdown menu with 'Low' selected.
- Done:** A dropdown menu with 'No' selected.
- Contact:** A list of contact information for 'Corey Matthews', including 'Address', 'Phone', and 'Email'.

A green 'Save' button is located at the bottom right of the form.

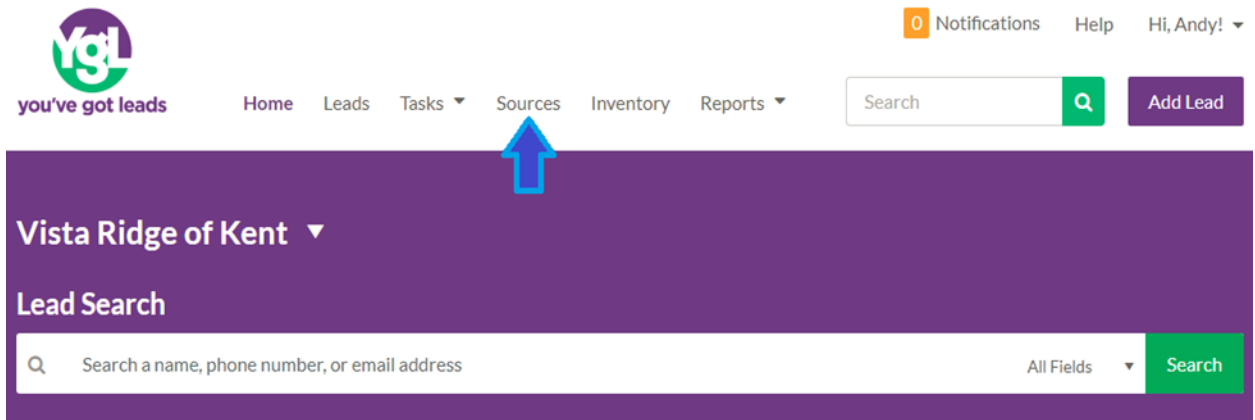
**Helpful tips and tricks:**

- **DON'T** update or edit an old task, delete the old task and create a new task accordingly.
- **DO** check all of your tasks through the tasks tab at the top of the screen and selecting "task search." This will help you filter through what needs to get done and what has already been done
- **DO** recognize that the sales phase will change accordingly depending on the tasks you have listed.

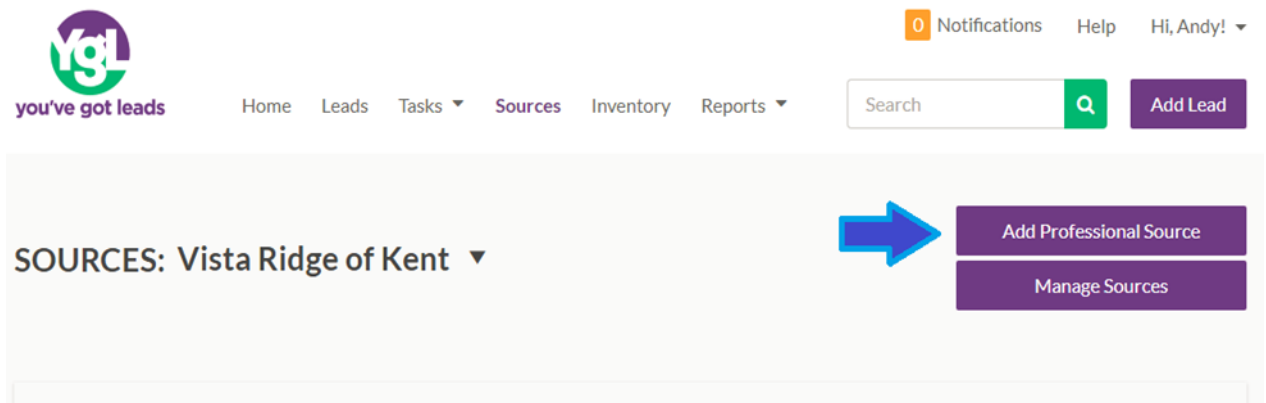


# How to Create a New Professional Source

1. In the You've Got Leads (YGL) website, select the "Sources" tab at the top of the screen.



2. Press the purple button labeled "Add Professional Source".



3. You will then be taken to a blank profile page with information to fill out for your new professional source.

A screenshot of the "Source Detail" form in the YGL website. The form is titled "Source Detail" and has a tab for "Activity". The form contains several input fields and dropdown menus for creating a new professional source. The fields are: Category (dropdown), Name (text), Job Title (text), Email (text), Address (text), Address2 (text), City (text), State (dropdown with "- Select -"), Zip (text), Org (dropdown), Status (dropdown with "Warm"), Active (radio button with "YES" selected), Work (text), Home (text), Cell (text), and Fax (text). At the bottom of the form are two buttons: "Save" (green) and "Cancel" (gray).

- The "Category" field will allow you to place your source in a specific area within the professional category.

The screenshot shows the 'Source Detail' form with the 'Category' dropdown menu open. A blue arrow points to the 'Hospital' option. The form includes fields for Name, Job Title, Email, Address, Address2, Org, Status, Active, Work, Home, and Cell. The 'Active' field is set to 'YES'.

- Once a category is selected you can then select an organization or "Org" from the drop down menu. If there is an organization that is not listed, you can create a new one by typing the name of the new organization and then pressing the "Enter" button on your keyboard.

The screenshot shows the 'Source Detail' form with the 'Org' dropdown menu open. A blue arrow points to the dropdown. The form includes fields for Name, Job Title, Email, Address, Home, and Cell. The 'Active' field is set to 'YES'.

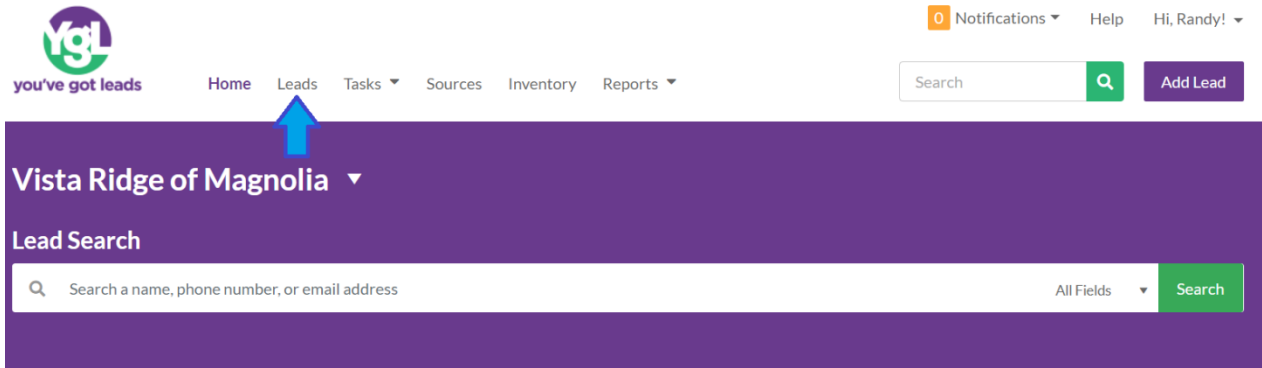
- The status of a source determines how active is a lead source for you ie. How often is this source bringing you referrals? How many of those referrals are moving into your community? Once you've determine the status, you can complete the rest of the source profile by filling out the remaining fields. Note: nothing is required to fill out for your professional source, but we recommend completing as much as information as you can.

The screenshot shows the 'Source Detail' form with a completed source profile. The 'Category' is 'Hospital' and the 'Org' is 'Seattle Medical ...'. The 'Name' is 'Michael Smith', 'Job Title' is 'MD', 'Email' is 'MSmith@mail.com', 'Address' is '12345 Hospital Ave.', 'City' is 'Seattle', 'State' is 'Washington', and 'Zip' is '98133'. The 'Status' is 'Warm' and 'Active' is 'YES'. The 'Work' phone number is '(123) 456-7890'. A green 'Save' button is highlighted.

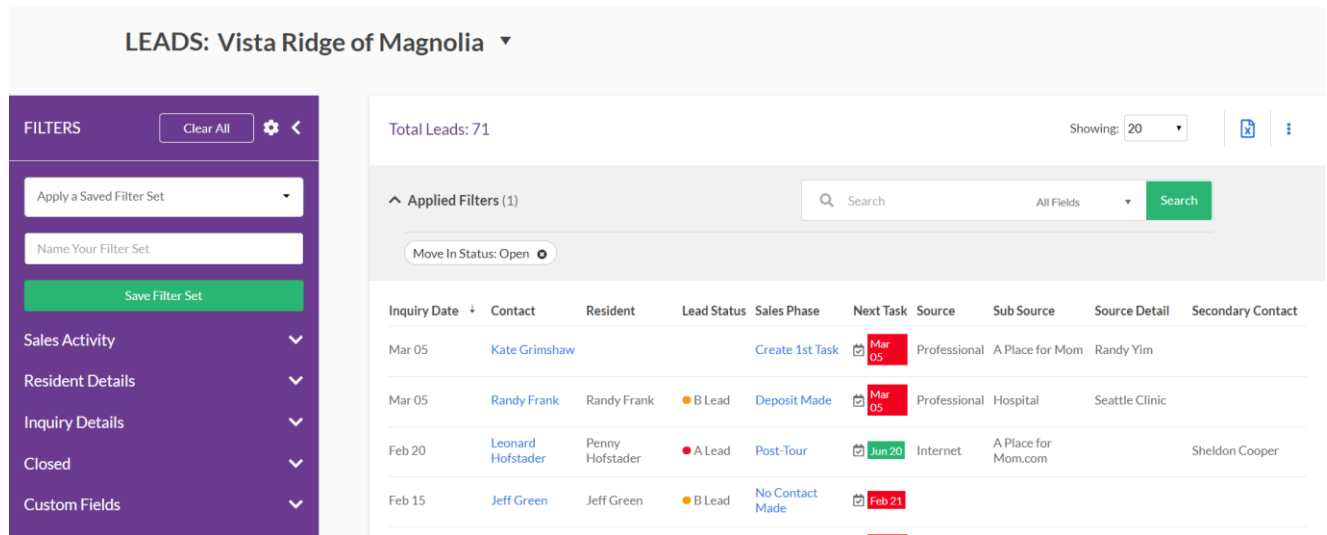
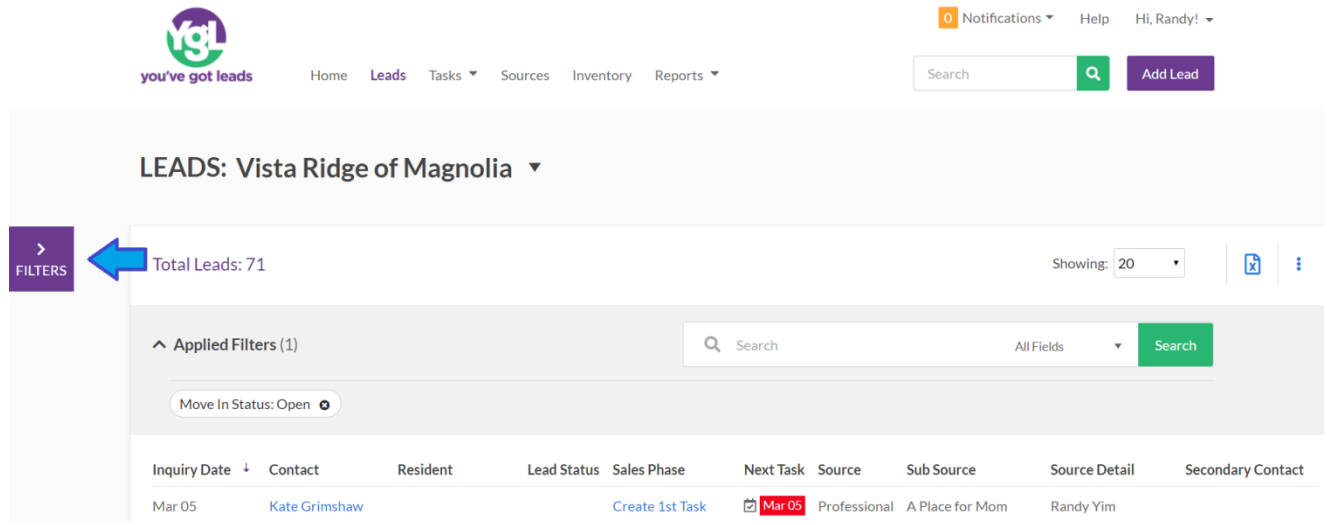
- Hit the green "Save" button to save and finish creating your new professional source! This information can be edited and updated at any time.

# How to View, Export and Print a Lead List

1. Select "Leads" on the home dashboard.



2. Use the lead search filters to choose which leads you would like to print mailing labels for. Lead search filters allow you to search for a specific set of leads e.g., only open leads, only hot leads, all residents, etc. As you apply filters, your lead list will automatically update to your specific applied filters. If you find that there is a set of leads you are consistently looking for, you can also save your search settings to apply at a later time. If you would like to clear all filters, simply click on the "Clear All" button.



- Once you have found your set of specific leads, select the Excel icon on the top right corner of your lead's list

LEADS: Vista Ridge of Magnolia ▾

Filters: Clear All ⚙️ ⏪

Apply a Saved Filter Set ▾

Name: Your Filter Set

Save Filter Set

Sales Activity ▾

Resident Details ▾

Inquiry Details ▾

Closed ▾

Custom Fields ▾

Total Leads: 71 Showing: 20 [Excel Icon] [More Icon]

Applied Filters (1) Search All Fields Search

Move In Status: Open

Inquiry Date	Contact	Resident	Lead Status	Sales Phase	Next Task	Source	Sub Source	Source Detail	Secondary Contact
Mar 05	Kate Grimshaw			Create 1st Task	Mar 05	Professional	A Place for Mom	Randy Yim	
Mar 05	Randy Frank	Randy Frank	B Lead	Deposit Made	Mar 05	Professional	Hospital	Seattle Clinic	
Feb 20	Leonard Hofstader	Penny Hofstader	A Lead	Post-Tour	Jun 20	Internet	A Place for Mom.com		Sheldon Cooper
Feb 15	Jeff Green	Jeff Green	B Lead	No Contact Made	Feb 21				

- Depending on our internet browser, the document will appear in different locations:
  - Downloads will appear at the bottom of the screen if you are using Google Chrome:

Mar 05	Kate Grimsh
Mar 05	Randy Frank
Feb 20	Leonard Hof
Feb 15	Jeff Green

Vista Ridge of Ma....xlsx

- Downloads will appear as a separate window if you are using Internet Explorer:

Windows Internet Explorer

What do you want to do with RadGridExport.xls?

Size: 139 KB  
Type: Microsoft Excel 2003  
From: www.youvegotleads.com

Open  
The file won't be saved automatically.

Save

Save as

Cancel

C.

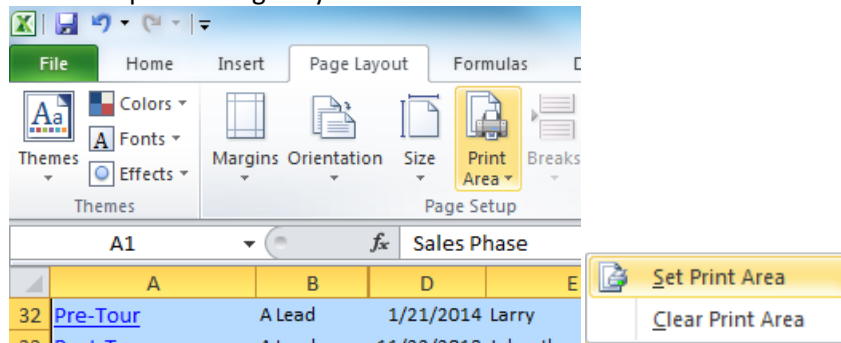
- Open the document by either selecting open or double-clicking the icon.
- This will open Microsoft Excel (it is not necessary to open Microsoft Excel prior to these steps) with all the information regarding the lead, sales phases, contact information, and inquiry date for your lead list.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Sales Phase	Lead Status	Primary Source	Inquiry Date	PrimaryFirstName	PrimaryLastName	PrimaryAddress1	PrimaryAddress2	PrimaryCity	PrimaryState	PrimaryZip	PrimaryHomePhone	PrimaryWorkPhone	PrimaryMobilePh
1	Lead												
2	Lead												
3	Closed - Lost Lead	Friend	11/28/2012	Paul	Abbott	One Main Street		Seattle	WA	KOH920	866-333-0969	866-333-0969	
4	Move-In	Family	5/8/2013	Mr. Joe	Bender			Ellwood City	PA	16117			
5	Move-In	Special Event	7/16/2013	Harry & Jill	Benson	89 First St.		Pittsburgh	PA	15112	412-555-1212	412-303-8218	412-333-4555
6	Move-In	Professional	7/30/2013	Bill	Berg								
7	Move-In	Professional	12/11/2013	Bill	Blass	7th street		Allison Park	PA	15101			
8	Move-In	Professional	9/4/2013	John	Brown	123 Any St		Yourtown		12345			
9	Pre-Tour	Professional	9/24/2013	Sandra	Bullock	115 Walnut St.		Seattle	WA	98119			
10	Post-Tour	Professional	12/18/2013	Eric	Clapton								
11	Post-Tour	Professional	9/11/2013	Bradley	Cooper	123 Hollywood Ave		Hollywood	CA	56789			
12	Post-Tour	Professional	1/27/2014	Sherri	Davies	56 West Ave.		Seattle	WA	98119			412-555-1212
13	Post-Tour	Internet	4/25/2013	Cathy	Davis	116 Kane Ave.	Apt. 340	New Castle	PA	16101	4407247240		
14	Post-Tour	Professional	2/17/2014	Jane	Doe	45 1st ave.		Seattle	WA	98119			
15	Move-In	Professional	8/8/2013	Bart	Dwyer								
16	Pre-Tour	Drive By	11/1/2013	Frederick	Freidman			Seattle	WA	98119			
17	Pre-Tour	Drive By	8/1/2013	Andrew	French	344 Route 9		Connequenesing	PA	13444	424-444-5555		
18	Pre-Tour	Special Event	8/14/2013	Frank	Furter	45 2nd Ave.	Allison Park	Seattle	WA	98777			
19	Pre-Tour	Professional	1/9/2014	Christa	Grsynksi	9th ave.		Seattle	WA	98119			412-555-1212
20	Pre-Tour	Professional	10/17/2013	Todd	Hatch						8663330789		
21	Create 1st Task	Professional	1/9/2014	Harry	Henderson								
22	Pre-Tour	Professional	11/14/2013	Deb	Hendrickson			Seattle	WA	98119	412-555-1212		
23	Post-Tour	Professional	9/9/2013	Vern	Hutchinson	2516 Collier Rd.		Allison Park	PA	15101			
24	Move-In	Professional	9/18/2013	Bill	James	123 Any St		Yourtown			206-555-1234		
25	Scheduled Move-In	Advertising	9/25/2013	Bob	Jones	123 Main St		Pittsburgh	PA	15232	812-555-1232		
26	Pre-Tour	Professional	8/14/2013	Christina	Keller	567 2nd ave.		Seattle	WA	98777			
27	Pre-Tour	Professional	7/22/2013	Samantha	Lucas	p.o box 12	954 Remington Way	Pittsburgh	PA	15222	412-555-1212		
28	Move-In	Internet	6/4/2013	Fred	McDowell								
29	Move-In	Professional	2/18/2014	Marty	McFly	1234 Smith Avenue		Seattle	WA	98109	8663330789		
30	Move-In	Professional	7/10/2013	McKinley	Morganfield	123 Delta Dr.		Clarksdale	MS	45667	202-555-1234		
31	Pre-Tour	Professional	1/17/2014	Sheri	Moyer	1st Ave. North		Seattle	WA	98119			
32	Pre-Tour	Professional	1/21/2014	Larry	Muller	897 Wilkinson St.		Pittsburgh	PA	15232			
33	Post-Tour	Professional	11/22/2013	Johnathon	Musseri	56 South West Ave.		Seattle	WA	98119			412-333-0000
34	Pre-Tour	Advertising	11/14/2013	Barry	Myers								

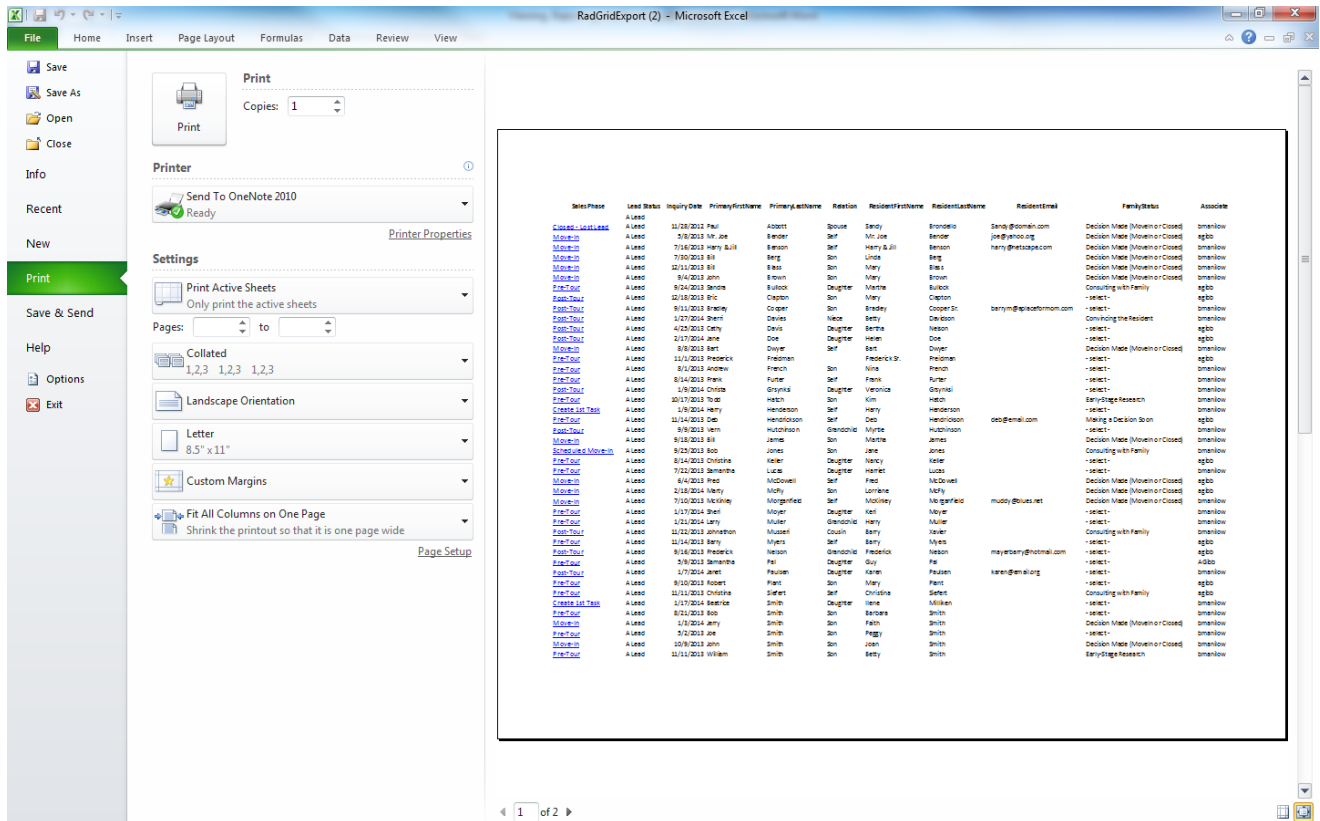
- After you've tailored your excel spreadsheet to your liking, highlight or select the information you want to print. To do so, left click the top left cell with "Sales Phase" and hold down the left-click button on your mouse while dragging across in a downward-right motion to select the information you want to print. Release the left-click button once you have your selection (example shown below). Avoid clicking anywhere else on the excel spreadsheet, which will "undo" your highlighted area and you will have to re-select your desired area.

A	B	D	E	F	T	U	V	AE	AK	AL	AN	AO	AP
Sales Phase	Lead Status	Inquiry Date	PrimaryFirstName	PrimaryLastName	Relation	ResidentFirstName	ResidentLastName	ResidentEmail	FamilyStatus	Associate			
1	Lead												
2	Lead												
3	Closed - Lost Lead	Lead	11/28/2012	Paul	Abbott	Spouse	Sandy	Brondello	Sandy@domain.com	Decision Made (Movein or Closed)	bmanilow		
4	Move-In	Lead	5/8/2013	Mr. Joe	Bender	Self	Mr. Joe	Bender	joe@yahoo.org	Decision Made (Movein or Closed)	agibb		
5	Move-In	Lead	7/16/2013	Harry & Jill	Benson	Self	Harry & Jill	Benson	harry@netscape.com	Decision Made (Movein or Closed)	bmanilow		
6	Move-In	Lead	7/30/2013	Bill	Berg	Son	Linda	Berg		Decision Made (Movein or Closed)	bmanilow		
7	Move-In	Lead	12/11/2013	Bill	Blass	Son	Mary	Blass		Decision Made (Movein or Closed)	bmanilow		
8	Move-In	Lead	9/4/2013	John	Brown	Son	Mary	Brown		Decision Made (Movein or Closed)	bmanilow		
9	Pre-Tour	Lead	9/24/2013	Sandra	Bullock	Daughter	Martha	Bullock		Consulting with Family	agibb		
10	Post-Tour	Lead	12/18/2013	Eric	Clapton	Son	Mary	Clapton		-select-	agibb		
11	Post-Tour	Lead	9/11/2013	Bradley	Cooper	Son	Bradley	Cooper Sr.	barrym@aplacemform.com	-select-	bmanilow		
12	Post-Tour	Lead	1/27/2014	Sherri	Davies	Niece	Betty	Davidson		Convincing the Resident	bmanilow		
13	Post-Tour	Lead	4/25/2013	Cathy	Davis	Daughter	Bertha	Nelson		-select-	agibb		
14	Post-Tour	Lead	2/17/2014	Jane	Doe	Daughter	Helen	Doe		-select-	agibb		
15	Move-In	Lead	8/8/2013	Bart	Dwyer	Self	Bart	Dwyer		Decision Made (Movein or Closed)	bmanilow		
16	Pre-Tour	Lead	11/1/2013	Frederick	Freidman	Self	Frederick Sr.	Freidman		-select-	agibb		
17	Pre-Tour	Lead	8/1/2013	Andrew	Furter	Son	Nina	French		-select-	bmanilow		
18	Pre-Tour	Lead	8/14/2013	Frank	Furter	Self	Frank	Furter		-select-	bmanilow		
19	Post-Tour	Lead	1/9/2014	Christa	Grsynksi	Daughter	Veronica	Grsynksi		-select-	bmanilow		
20	Pre-Tour	Lead	10/17/2013	Todd	Hatch	Son	Kim	Hatch		Early-Stage Research	bmanilow		
21	Create 1st Task	Lead	1/9/2014	Harry	Henderson	Self	Harry	Henderson		-select-	bmanilow		
22	Pre-Tour	Lead	11/14/2013	Deb	Hendrickson	Self	Deb	Hendrickson	deb@email.com	Making a Decision Soon	agibb		
23	Post-Tour	Lead	9/9/2013	Vern	Hutchinson	Grandchild	Myrtle	Hutchinson		-select-	bmanilow		
24	Move-In	Lead	9/18/2013	Bill	James	Son	Martha	James		Decision Made (Movein or Closed)	bmanilow		
25	Scheduled Move-In	Lead	9/25/2013	Bob	Jones	Son	Jane	Jones		Consulting with Family	bmanilow		
26	Pre-Tour	Lead	8/14/2013	Christina	Keller	Daughter	Nancy	Keller		-select-	agibb		
27	Pre-Tour	Lead	7/22/2013	Samantha	Lucas	Daughter	Harriet	Lucas		-select-	bmanilow		
28	Move-In	Lead	6/4/2013	Fred	McDowell	Self	Fred	McDowell		Decision Made (Movein or Closed)	agibb		
29	Move-In	Lead	2/18/2014	Marty	McFly	Son	Lorraine	McFly		Decision Made (Movein or Closed)	agibb		
30	Move-In	Lead	7/10/2013	McKinley	Morganfield	Self	McKinley	Morganfield	muddy@blues.net	Decision Made (Movein or Closed)	bmanilow		
31	Pre-Tour	Lead	1/17/2014	Sheri	Moyer	Daughter	Keri	Moyer		-select-	bmanilow		
32	Pre-Tour	Lead	1/21/2014	Larry	Muller	Grandchild	Harry	Muller		-select-	bmanilow		
33	Post-Tour	Lead	11/22/2013	Johnathon	Musseri	Cousin	Barry	Xavier		Consulting with Family	bmanilow		
34	Pre-Tour	Lead	11/14/2013	Barry	Myers	Self	Barry	Myers		-select-	agibb		

8. Select the tab at the top with “Page Layout” and then select “Print Area” and “Set Print Area”



9. Select the “File” tab and then select which printer you would like to print to under the drop down menu. Next click “Print”.



### Helpful tips and tricks:

- **DO** make sure you have selected the right property if you have access to multiple. You can find the drop down menu (if you have one) in the same purple bar as “Lead Search Filters.”
- **DON'T** forget to double check and “preview” what your excel spreadsheet will look like before you print it.
- **DO** enter new information about the leads **before** exporting so that your spreadsheet has the most up to date information.
- **DON'T** forget to “hide” unnecessary columns or rows to help save space and keep the information tidy.