

Search, List, and Export Leads

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Families that have been archived to the *Lead File* can be accessed at any time under the *Families (menu)*.

Search Leads

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

List Leads

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

Export Leads

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