The Official Guide to Preparing List Submissions via

TOP PRODUCER 7i

Exclusively for

marketing matters

You can export your contact records from TOP PRODUCER 7i to a standard comma-separated values (.CSV) file, which you can then send as an attachment to us at list@mymarketingmatters.com.

1. From the main menu, highlight Setup, Data transfer / conversion, then click Export data.... The Export contacts page is displayed.

2. Select an export option:
   • Export all contacts — select this option to export all contact, listing, closing, lead, and referral records.
   • Search for contacts to export — select this option to search for and select specific records for export.
3. Click Next to proceed.
   • If you selected Export all contacts (in step 2), the Export contacts to a file page opens. Skip to step 6.
   • If you selected Search for contacts to export (in step 2), the Search contacts for export page opens. Proceed to step 4.
4. From the Search contacts for export page:
   • Perform either a Quick search or an Advanced search to specify the types of records you want to export.
   • Click Display all from the control menu to retrieve all records.
5. The Contact search results for export page is displayed with the results of your search.
   • Use the Select all link to highlight the entire list of records.
   • Hold down the [Ctrl] key and click on specific records to select multiple records from the list.
   • Click the Search results total link in the bottom right corner to get a count of how many records you have in the list.
   • Click Next to proceed.
6. From the Export contacts to a file page, select an export option: Remember the Club needs at Minimum First name. last name and email address. If you have location info such as zip code… even better
   • Export all columns — choose this option to export all TOP PRODUCER 7i database columns.
   • Export selected columns — choose this option to customize your export by selecting the columns and the order in which you want to export.
      Double-click the columns you want to export from the Columns available for export grid (or select the respective columns and use the right arrow icon) to move them into the Columns selected for export grid. The order you choose in the Columns available for export grid, determines their order in the export file. Use the Move up/Move down links to change the order.
   • Export search results columns only — if you chose to search for the contact(s) you want to export in step 2, you can export only the three columns that were displayed on the Con tact search results for export page (contact name, address and main contact number). This option will NOT be available if you chose to export ALL contacts.

7. Click Start export to begin. The Save exported file as... pop-up window is displayed.