

Agent Office Categories and Groups

Export Procedure

In AO, gather the group of people you want to export, using Tools, Group, Search by example, and then select the category of people you want to export, Begin, OK.

If you want to export everyone in your database, put "-" (without the quotes) in the first name field when you do your search. That is searching for everyone in your database who does not have a "-" in their first name, which would be everyone.

Then click on File, Export Contact Information, in 'Export to file', double click, then in the 'Save in' field, pick a place to export the file to. The Desktop is probably a good place to save it temporarily. You can delete it from the desktop after you're finished with it. In 'Save as type', select 'All Files'. **Then in 'File Name', name the file, and end it with a ".csv" - no quotes. Click 'Save'.**

Use the following routine if you are exporting labels for a third party:

The 'Export Contact Information' box will open. Click on 'Address Heading', then click on 'Include'. Now click on Address 1, Address 2, City, State, and Zip. Click 'Include', and 'OK'.

Use the following routine if you are exporting for some other reason:

The 'Export Contact Information' box will open. Click on the fields you want to export, then click on 'Include', and 'OK'.

The file has now been exported to your desktop. Go to your desktop, and you will see the file you exported - "WhateverYouNamedIt.csv".