

Prepare Export

08/02/2023 10:30 am EDT

1. On the “Appeal Summary” page, click “Prepare Your Export” on the bottom right of your screen to continue.
 2. You will see all the “Mandatory Fields” that will be included on your mailing list.
 3. You can include “Suggested Fields” and select any “Custom Fields” from your CRM that you wish to include in your mailing list.
 4. Once you’ve made additional selections, click “Export Now” on the bottom right of your screen.
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