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PharmSource Lead Sheet (PLS)

How to Export & Download Leads to Spreadsheet Format

There are two basic steps to saving leads/data from the ***PharmSource Lead Sheet*** in spreadsheet format. The first is to select leads/data you wish to export, and the second is to download selected data. The instructions below are for exporting/downloading data from the weekly Lead Sheet. The *Full Database Search* and the *Qualifying Information Search* features both include options to download search results directly into spreadsheet format.

Selecting Leads to be Exported:

Select the leads you wish to include in your download using any of the following methods:

A. To export an individual lead, or a selective group of leads, select the "Export" box located in the upper left corner of each relevant lead that you wish to export.
B. To export all leads on the page, click on the "Export All" link located at the bottom of the left navigation bar. This will select all of the leads on the page for export.
C. To export additional contact names/titles for any lead, click on the company name at the top of the lead of interest. This will open a company profile box. The company profile box will have the contact information from the front of the lead sheet as well as additional contact names and titles that can be added to your download. Select the check box next to the name of the contact you wish to add to your download. After selecting the contact names you want included in your download, scroll to the bottom of the box, and click on the *Apply Contact Filter* button. This will save the newly selected information for download.

Once leads have been selected for export, you may still de-select any leads or contacts you do not want included in the download. To do this, simply click on the check box next to the associated contact or lead, and it will be de-selected. **Note**: there is a **Clear All** option located next to the **Export All** option in the left navigation bar. Click **Clear All** if you wish to clear all of your selections in a single action.

Downloading leads to a designated file folder, and re-naming the file:

A. Create a folder on your hard-drive, which you will use for all ***PharmSource Lead Sheet*** downloads. We recommend naming the folder "PharmSource Leads" so it can be readily found.
B. Once you've finished selecting leads for your download, click on the **Downloads** button located in the left navigation bar.
C. **Save the file** to the PharmSource folder you made. Note: each download is automatically assigned a unique name, which includes the date and hour of the download (using the Eastern time-zone). You may want to rename files or add a notation so you can easily distinguish various downloads.

After your download is complete:

Once your download is complete, simply go to your PharmSource folder, locate the downloaded file, and open it. Data appears in spreadsheet format (known as .csv or "Comma-Separated Value" file format). The spreadsheet captures all selected leads and associated data, with a separate column for each data field and a separate row for each selected contact person.

Making the most of your spreadsheet:

The spreadsheet is now ready to be used as a mail-merge file, streamlining and speeding your mailing process. The spreadsheet also may be imported into contact management software (such as Goldmine, ACT!, salesforce.com, etc.), which accepts .csv file format. Please refer to your CRM software manufacturer's instructions for instructions on importing data. Even if you don't use contact management software, the spreadsheet is a useful tool for tracking and managing lead follow-up.

Questions?

Contact the ***PharmSource Lead Sheet*** team at 703-383-4903 (ET USA) or send an e-mail message to info@pharmsource.com. We want to help you get the most out of our service!