

Exporting a List of Advocate Login Information

If you intend to provide your volunteers with their Advocate information (login credentials) the day-of your phone bank instead of emailing them in advance, follow the steps below. It is best to complete these step immediately after you “Enable Advocates.”

1. After you have clicked Enable Advocates, click the button “Export Results.”

Use the **Current Selection** window to open records, save to lists, and export sets of records.

Selection Results			
Name	Address	City	State
<input checked="" type="checkbox"/> Balistrieri, James	1350 N. Federal Highway	Pompano Beach	FL
<input checked="" type="checkbox"/> Benchick, Cynthia	P O Box 70702	Fort Lauderdale	FL
<input checked="" type="checkbox"/> Bruck, Claudette	12088 NW 27th St	Coral Springs	FL
<input checked="" type="checkbox"/> Casper, Sean	315 NE 3 Avenue #1408	Fort Lauderdale	FL
<input checked="" type="checkbox"/> Chapman, Mack	1800 S Ocean Dr #3110	Hallandale Beach	FL

Perform one of the functions by clicking the links below:

- Add/Edit Fields and Calculate
- Save Output Preferences
- Save Results as New List
- Add Results to Existing List
- Add Results to Existing Group
- Merge Selected Records
- Export Results**
- Generate Thank You Emails
- View Results in Map
- Enable as Advocate(s)

Or to find your list again (if you are exporting this list in another session), go to Search>List Manager. Select your list, and click the lightning bolt icon and select “Individuals.” Then click the icon “Export Results” (as shown in the screen shot above).

List Manager

The **List Manager** allows you to manage and save sets of records for future use. Select the list icon to open an available list.

Open	List Name (Click to open list settings)	Date	List Category	Read Only	Delete
	2016 PA Investors - January	02/22/2016			
	NC:864:5540 - 2016 #%cLt#% \$14.00 Members #...	02/22/2016	Fundraising		
	CCAR Non-Investors	02/22/2016			
	Fort Lauderdale Targets	02/22/2016			
	All	02/22/2016			
	Individuals				
	Volunteers	02/22/2016			
	AOR - 2016 #%cLt#% \$14.00 Memb...	02/22/2016	Fundraising		
	Legislators	02/22/2016	Fundraising		
	Organizations	02/22/2016	Fundraising		
	Committees	02/22/2016	Fundraising		
	AOR - 2016 #%cLt#% \$14.00 Memb...	02/22/2016	Fundraising		
	www-presidents Circle Roster	02/19/2016	Fundraising		
	CA:808:1980 - 2016 Non-Investors / 2014 > \$20.0...	02/19/2016	Fundraising		
	CA:808:1980 - 2016 Non-Investors / 2015 > \$20.0...	02/19/2016	Fundraising		
	LauraCamp FedAccessTEST	02/19/2016			
	CA:808:1980 - 2015 Non-Investors / 2014 > \$20.0...	02/18/2016	Fundraising		
	CA:808:1980 - 2015 Non-Investors / 2015 > \$20.0...	02/18/2016	Fundraising		

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2. Select the following fields from the left column “Fields to Export” and use the top arrow button (>) and move them to the right column “Selected Fields.”
 - a. Advocate_Panel_ID
 - b. Advocate_Panel_Password
 - c. Source ID
3. Click the green Export Results button.


Export Records:

 Use the Export page to export your selected records in Excel or Comma Delimited (CSV) formats.

STEP 1: SELECT EXPORT FILE FORMAT

STEP 2: SELECT DELIVERY OPTIONS

Export As:  Microsoft Excel Send me notification once export is complete.

 Comma Separated Values Notification Email:

Show categories with delimited groups

STEP 3: SELECT FIELDS TO EXPORT

Fields To Export

Available Fields:

- Advocate_Panel_AllowedToCreateActivit
- Advocate_Panel_AllowedToFundraise
- Advocate_Panel_AllowedToViewAactiviti
- Advocate_Panel_ChildDonors
- Advocate_Panel_ElectionResponse
- Advocate_Panel_Goal
- Advocate_Panel_Id**
- Advocate_Panel_IsRegister
- Advocate_Panel_Link
- Advocate_Panel_ParentName
- Advocate_Panel_Password
- Advocate_Panel_TotalContribution
- Aux. Phone Number
- Birth Date
- Default Address 2
- Default Address 3
- Default Address Country
- Default Address County

Mandatory Fields:

- First Name
- Last Name
- Default Address 1
- Default Address City
- Default Address State

Selected Fields:

Selected fields will appear here.

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* You may select up to 4 calculated fields at one time.

Export Records

To accommodate exports for a large number of records, all exports using this tool are performed offline. Upon completion of an export, a notification is sent via a system message. That system message can be viewed by clicking the “Home” menu item. The message will appear in the “System Messages” panel on the left hand side of the screen. An email is also sent upon completion if an email address is provided in the “delivery options” section at the top of the “Export Records” screen.