## **EXPORTING FROM GENIE**

Once you have completed your search, follow the steps below to export your list into a CSV formatted excel file. You will also find steps to upload into Allstate's internal Do Not Solicit tool.

1. Click on Export icon and choose Download:



 First put a name in the Export Name field. Choose All or Random Sample if you do not want All records in the list. Always use the Comma Delimited CSV file format. Choose Custom for Level of Detail and choose "Allstate DNS Format" from the Saved Lists drop box. Then click GO.

Export Name				
Export Name (Optional)				
Choose Records				
All (338 Total)	-			
	_			
Choose a file format				
Comma Delimited (CSV)	-			
Choose level of detail				
Custom	•			
Directions: Add the fields you wish to export to down arrows. The fields will export	the box on the right. R in the order displayed	eorder the fields usir in the list.	ng the up and	
Directions: Add the fields you wish to export to down arrows. The fields will export You may load or save custom lists o Saved Lists Allstate DNS Format	the box on the right. R in the order displayed of fields here. Delete	corder the fields usin in the list.	ng the up and	Save
Directions: Add the fields you wish to export to down arrows. The fields will export You may load or save custom lists o Saved Lists Allstate DNS Format	the box on the right. Fin the order displayed of fields here.	corder the fields usin in the list.	ng the up and	Save
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Directions: Add the fields you wish to export to down arrows. The fields will export You may load or save custom lists of Saved Lists Allstate DNS Format Search for a Field All Lead Status Tags Date List Produced Record Expiration Date	the box on the right. Find the order displayed of fields here.	eorder the fields usin in the list.	ng the up and	Save
Directions: Add the fields you wish to export to down arrows. The fields will export You may load or save custom lists of Saved Lists Allstate DNS Format Search for a Field All Lead Status Tags Date List Produced Record Expiration Date Title	bette box on the right. R in the order displayed of fields here. Delete First Last Add City City Cata	eorder the fields usin in the list.	ng the up and	Save

3. When you get the Credit Usage pop-up simply click Ok to proceed with your download:

redit Usage	
Lead Cr	edits
Records to export	5
Credits deducted	5
Credits available	991
Remaining after this export	986
Salesgenie allocates credits to each user when exporting records. Please cor your account representative if you have questions or need additional credits	itact ;.
\	
Cancel	Ok

6. Your file will up at the bottom of your browser window to click on to open it in Microsoft Excel:

	12	55 - 59	Gustafson	Omaha
	13	65+	Lahood	Omaha
Q	Page	1 of 6		
x a	Cust	tom201908140csv	^	

\*Once exported, it should automatically pull into Microsoft Excel on your computer; ALWAYS choose OPEN if it gives you the pop up asking as shown below\*

Do you v	rant to op	en or save this file?
പ	Name:	Custom2012061316572309.csv
	Type:	Microsoft Office Excel Comma Separated Values
		Open Save Cancel
2	While files fr arm your co ave this file	om the Internet can be useful, some files can potentially omputer. If you do not trust the source, do not open or What's the risk?

## Your list should display like the example shown below:

	Clipboard	G	Font	- Gi		Alig	Inment	G.	Number	G	St	yles	
	A1	- (	<i>fs</i> First Name										
	А	В	С		D	E	F		G		Н	- I	J
1	First Name	Last Name	Address	C	City	State	Zip Code	Phone Numbe	er Combined U	nformatt	ed		
2	Christopher	Billings	1813 Ridgeview Dr	F	Papillion	NE	68046			4026146	186		
3	Jack	Turman	12434 S 79th Ter	F	Papillion	NE	68046			4029349	345		
4	James	Raymond	1312 Cedarwoods Dr	F	Papillion	NE	68046			4025970	615		
5	Judy	Russell	1214 Applewood Dr Apt	F107 F	Papillion	NE	68046			4029348	3764		
6	Jasmine	Brown	1510 Grandview Ave Apt	:2 F	Papillion	NE	68046			4027155	5121		
7	Elizabeth	Mcilree	1011 Norton Dr	F	Papillion	NE	68046			4027639	182		
8	Mary	Lewis	801 N Adams St	F	Papillion	NE	68046			4025026	645		
9	Ricardo	Turner	1011 E Aberdeen Dr	F	Papillion	NE	68046			4025970	707		
10	John	Oliveri	808 Driftwood Dr	F	Papillion	NE	68046			4025379	580		
11	Derek	Cassoutt	2211 Broadwater Dr	F	Papillion	NE	68046			4029341	.004		
12													

\*After you have made these changes, you can now save your list into your *My Documents* on your computer. Go to the *Save As* option and make sure *Save as type* still displays the CSV format.

🕱 Save As	a line of the line of the			-		×	[Read-Only] - Micros
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Organize 🔻 New folder				8	. <b>.</b>	0	eral 🔹
★ Favorites	Documents library Includes: 2 locations		Arra	inge by:	Folder 🔻		~ % ,
📜 Libraries	Name		Туре	*	Size	^	
Documents =	WebEy		File folde				G
A Music	Indator5		File folde				umberCombined
Distures			File folde	r			9523881520
Pictures	My Music		Filefolde	r			9524695811
Videos	My Data Sources		File folde	r			9523784001
	IBM IBM		File folde	r			9522558450
P Computer	IBM IBM		File folde	r			9522368872
🏭 Local Disk (C:)	鷆 Downloads		File folde	r		-	9524321339
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						-	9522368625
File name: Ricks A	uto					•	9522369569
Save as type: CSV (Co	omma delimited) (*.csv)					-	9522558590
	K					_	9522368407
Authors: Wise, Ke	vin	lags: Add a tag		1			9522360096
			×				9522360901
🔿 Lide Felders		Tools -	Save		Cancel		9523881457
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7 Edward Greeco	18208 Ipvine I n		keville M	4N	55044		9523881346
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lo Vent Venter	16252 Jatos Cir		kovillo M	ANI	55044		052250255

\*\*Upon saving your list, you will get a pop-up that some features may not be compatible with the format you chose (.CSV) – click YES to keep it in this format for the DNS.



FOR ADDITIONAL QUESTIONS OR ASSISTANCE VISIT OUR HELP SITE <u>www.dataaxslegenie.com/allstate</u>

CALL 888-870-5117

Email allstatehelp@data-axle.com

## Instructions on uploading to the DNS Tool

Allstate.		DO NOT SOLICIT
ome Phone Search A	ddress Search	File Scrub File Status
DNS Home		
DNS Home Please refrain from using I window and results may n	between the ho not reflect recent	ours of 7pm through 10pm (Central Time) on Sunday evenings. This is the maintenance It changes in status.
DNS Home Please refrain from using I window and results may n Phone Number Search	between the ho not reflect recent	burs of 7pm through 10pm (Central Time) on Sunday evenings. This is the maintenance it changes in status. Search for DNS Phone Numbers by Telephone Numbers / Area Code
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DNS Home Please refrain from using l vindow and results may n Phone Number Search Address Soarch File Scrub File Scrub Help	between the ho not reflect recent 	burs of 7pm through 10pm (Central Time) on Sunday evenings. This is the maintenance it changes in status. Search for DNS Phone Numbers by Telephone Numbers / Area Code Search for DNS Addrosses Scrub your data file (against Phone & Address) for DNS Indicator and consumer status Check me status or a me you submitted for scrubbing Click Help for Job Aid and Navigational tips

## Access the DNC Scrubbing Tool in My Quick Links on Gateway.

Click the "File Scrub" link or tab.

e Search Address Search File Scrub File Status	Help Clos
Ir file for OK To Solicit Data	
structions:	Please select file to scrub:
mma delimited (.csv) files can be uploaded. For information on this to convert your Excel Choose File to Upload	spreadsheet into ? X Identify customers, former customers, and
Look in: 💼 My Documents 🔹 😮 🍺 💌 🎟 🗸	prospects
My Recent Documents My UND Control of Cold-Prework.doc	nail Address: LBIS2@allstate.com Submit Reset

- 1. Click "Browse" to locate your file in "My Documents".
- 2. Click "Identify customers, former customers, and prospects". Your email address will be pre-filled.
- 3. Click "Submit".

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