

Chamber Marketing Lead List Retrieval
January 2017

If a member would prefer to deal with an MS Excel file instead of the Lead List Email or wishes to manage their Lead List when time permits instead of the daily email, they may download the Lead List when convenient from the Chamber website – Business Member Login (Member Information Center) section. Members must know their logon name & password and must have MS Excel on their PC.

1. Go to the Chamber website (www.sanibel-captiva.org).
2. Click on the “**Business Member Login**” link in the Footer of the home page.
3. Login to your account.
4. Under Reports (menu item across the top), on the left side, click on ‘Lead List’
5. The next screen will show default information for ‘today’s date’.
 - a. Be careful using today’s date because this represent only those leads that have arrived so far today. (our current email of leads is always a day behind).
6. There are several ‘filters’ that can be manipulated.
 - a. Consumer Name – would only be used if you are looking for a specific person.
 - b. Interest Category – Members may have signed up for more than one category.
 - i. Members will see only categories for which are signed up.
 - ii. Each category must be managed (printed or downloaded) separately.
 - c. Request Date – the date for which you would like to view / download leads.
 - i. This is a single date (defaulting to “today”) or click on ‘use a date range’ to select all leads for multiple dates.
 - d. Click ‘Refresh’ anytime you change one of these filters.
7. Members now have the option of printing a summary or detail list or downloading the list.
 - a. Printing a summary or detailed list will first generate a new screen to show you what you are printing. Click on ‘File’ and then ‘Print’ to print your report.
 - i. When you have finished click ‘X’ in the upper right hand corner of the listing screen.
 - b. If you click on ‘Download’ you should receive a pop-up window asking if you want to save or open the file.
 - i. Many PCs are different and yours may not ask but just save it to your default save folder or desktop.
 - c. You can open the file to review the contents and then save it or print it.
8. You are now finished (unless you need to repeat this process for another category).
9. You can log out.

If you have any problems or need any assistance please call Steve Ehrhart at 472-8759