

# How to backup your LEADS data from a Agent Image website tied to Follow Up Boss CRM





Go to your admin page.  
[www.youwebsite.com/wp-admin](http://www.youwebsite.com/wp-admin)



## Click on Export Leads With Full Details



The screenshot shows a WordPress dashboard with a dark sidebar on the left containing navigation items: Posts, Pages, Contact, CF7 Leads (highlighted), AIOS Listings, AIOS Testimonials, Media, and AIOS Communities. The main content area has a top notification bar with a red border containing the message: "The HubSpot plugin isn't connected right now. To use HubSpot tools on your WordPress site, [connect the plugin now](#)." Below this is another notification: "An automated WordPress update has failed to complete - [please attempt the update again now](#)." The main heading is "FORM SUBMISSIONS - CONTACT FORM 7". Below the heading are two buttons: "All Messages" and "404 Page Form". On the right side of the main area, there are three buttons: "EXPORT LEADS" (dark blue), "EXPORT LEADS WITH FULL DETAILS" (teal, highlighted with a red box), and "2146 SPAM BLOCKED" (grey). At the bottom right, there is a red button labeled "DELETE SELECTED".

Agent Image runs off of a wordpress site, so your installation might be different. We went to CF7 Lead. Clicked Export Leads With Full Details and the file was downloaded to our hard drive. It did not have anything more than the basic information about the contact. The more extensive information was in the connected CRM, which in this case was Follow Up Boss



These next slides are related specifically to Follow Up Boss

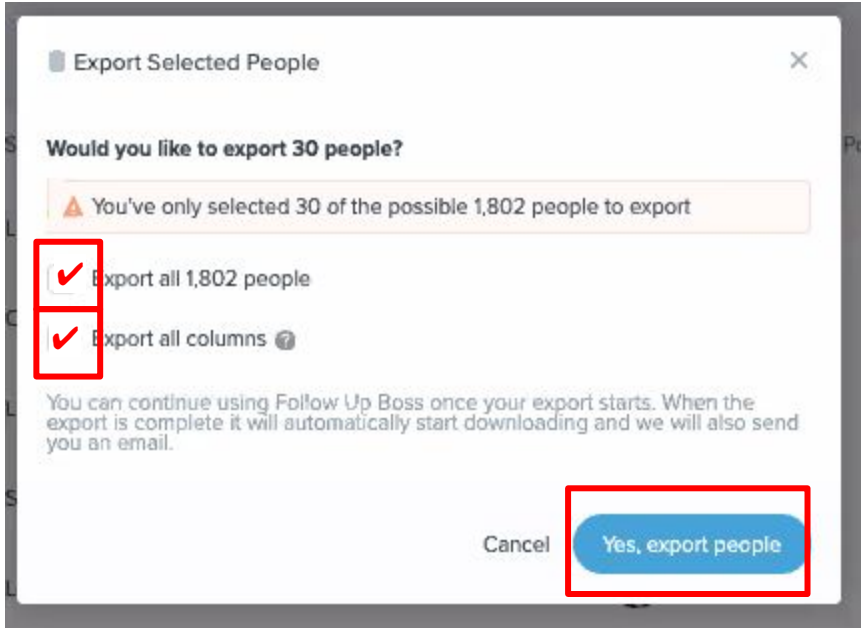
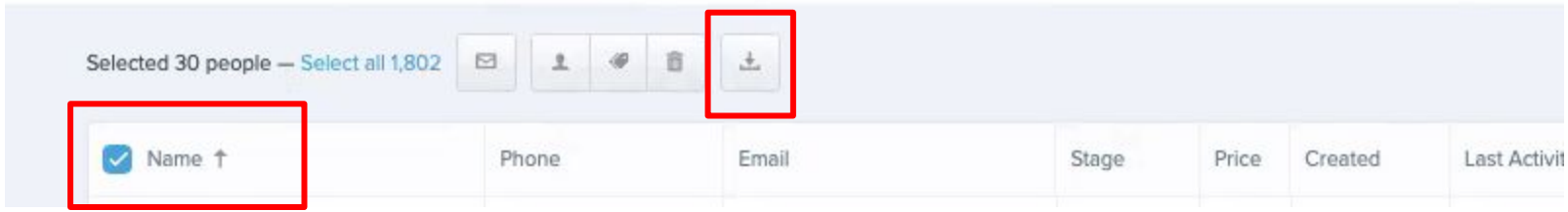


**follow up boss**



The image shows a screenshot of a CRM dashboard. At the top is a dark navigation bar with several menu items: a home icon, 'People', 'Inbox', 'Tasks', 'Calendar', 'Deals', 'Reporting', and 'Admin'. A red rectangular box highlights the 'People' menu item. Below the navigation bar is a secondary menu with items like 'Overview', 'Business Registration', 'Lead Flow', 'Groups', 'Team', 'Action Plans', 'Automations', 'Ponds', 'Email Templates', 'Text Templates', 'Import', and 'Custom'. The main content area is divided into two sections: 'Lead Distribution' and 'Follow Up'. 'Lead Distribution' contains three cards: 'Lead Flow' (with a description: 'See your leads flowing in & choose how to assign them & action plans.'), 'Groups' (with a description: 'Distribute leads via round-robin or first-to-claim groups.'), and 'Ponds' (with a description: 'Create ponds your agents can prospect from to gain opportunities.'). 'Follow Up' contains four cards: 'Action Plans' (with a description: 'Send personalized drip emails, setup tasks, change stages & more.'), 'Automations' (with a description: 'Trigger action plans & quick actions when a stage changes or other trigger events.'), 'Email Templates' (with a description: 'View & edit email templates, see opens & clickthrough roles.'), and 'Text Templates' (with a description: 'View & edit text templates, see effectiveness based on...').

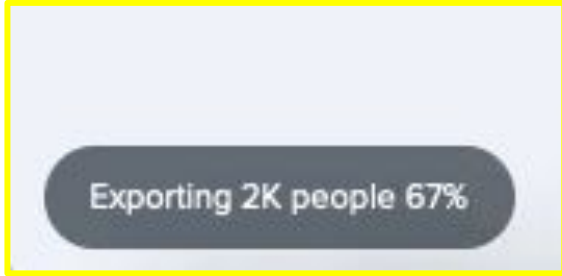
Click on People in the upper black bar



Click on NAME column to select all leads.  
Click on the down arrow icon to start the download.  
In the dialog box, select Export All People and Export All Columns and then Yes, Export People.

This will create a CSV file and let you save it to your hard drive.





The export will begin and you'll see this dialog box in the lower Left Corner.

Accept the downloaded file and save it to your hard drive.

Name your backup files for easy access. For example

2024\_04\_20\_WebsiteName.csv

Repeat this process weekly at minimum. Keep a copy on the Cloud Drive (Google, Apple, or Windows) AND keep a copy on your computer hard drive.

