

How to backup your LEADS data From a Lofty/Chime website.



The screenshot displays the Lofty CRM interface. At the top, a navigation menu includes 'Lofty', 'People' (highlighted with a red box and a red '1' above it), 'Transactions', 'Calendar', 'Listings', 'Marketing', 'Reporting', 'Website', 'Marketplace', and 'Settings' (highlighted with a red box and a red '2' above it). On the left, a 'SEGMENTS' sidebar lists 'All Segments' (2584), 'Mapleton Post...', 'Paige Newslett...', and 'referral/networ...'. The main area is titled 'All Leads' and features a breadcrumb trail: 'All Leads 2584' > 'New Leads 450' > 'Lead 830' > 'Active Client 31' > 'Attempting Contact 535'. Below this is a table with columns for 'Name', 'Pipeline', 'Agent', and 'Contact Info'. A red box highlights the 'People' and 'Settings' menu items, and a red '1' is placed above 'People' and a red '2' is placed above 'Settings'.

Go to <https://crm.lofty.com/admin/home/home>

On the top menu click on PEOPLE and then SETTINGS



Notifications

Team

Agent

Lender

Vendor / Partner

Lead Distribution

Lead Routing

Reassignment Group

Features

Auto Property Alerts

Lead Pond

Tags & Sources

Custom Fields

Integrations

Lead Capture

AI Assistant

Reporting

Lead Import

Lead Export

Transactions

User - P

Edit Profile



On the left-hand side select Lead Export.
Then verify the number of leads matches all leads in
your CRM and clie Export

Export Range **All** Based on Search Criteria

2584 leads to export

Export



SmallBrands
M E D I A



Your export request has been processed.
We'll email to your login email when it's
ready.(Please also check your spam)

[Export another file](#)

Your Exported list will be emailed to you at the address registered to your site.

Download the file. Do not just leave the file on the server. If that server is ever down you still won't have your data.

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.

