

How to backup your LEADS data From a RealGeeks website.

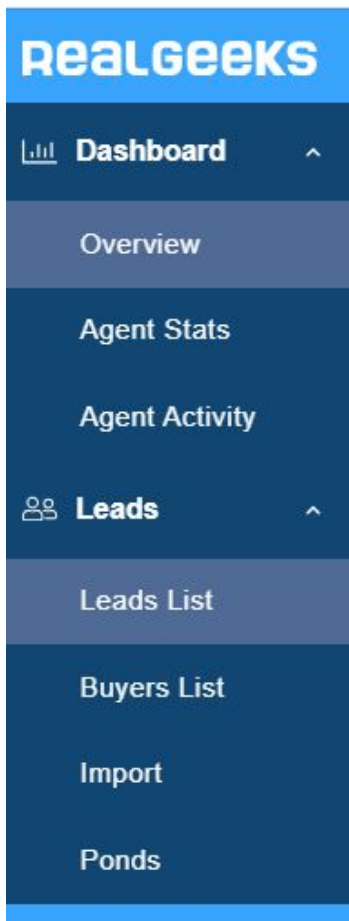


Go to leads.realgeeks.com

Click on LEADS / LEADS LIST
On the left-hand column

Be sure No Search Filters are
selected and continue.

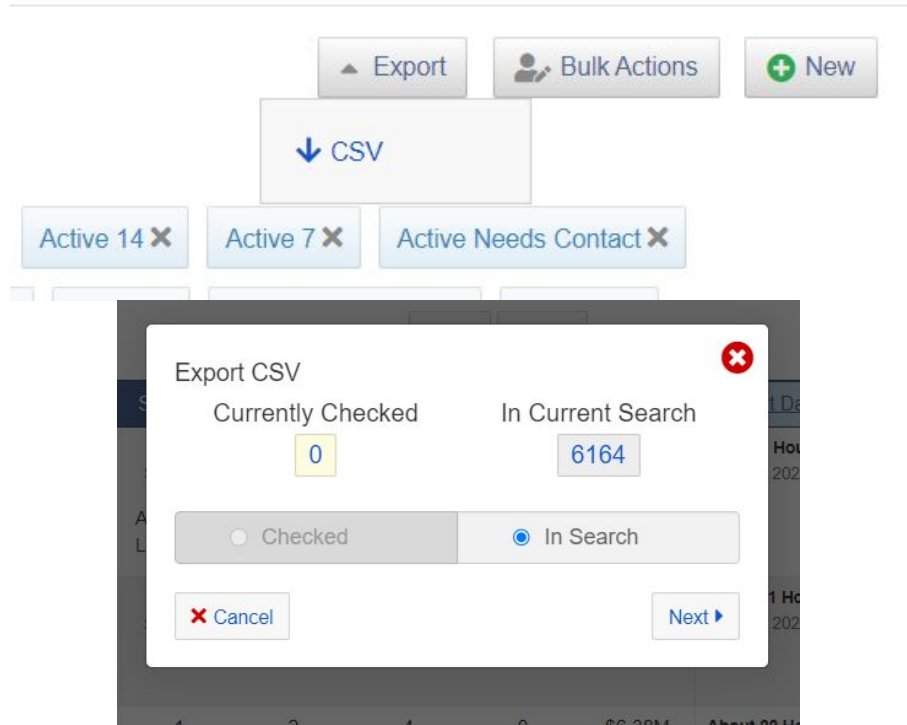
 [CRM / Lead Manage](#)



In the upper right-hand corner
Look for the EXPORT button

If you don't see the button, you
do not have the rights to run an
export and you should contact
RealGeeks support.

Pick the CSV option.
Be sure the option "In Search"
is selected. Be sure that number
matches the total number of
leads in your CRM.

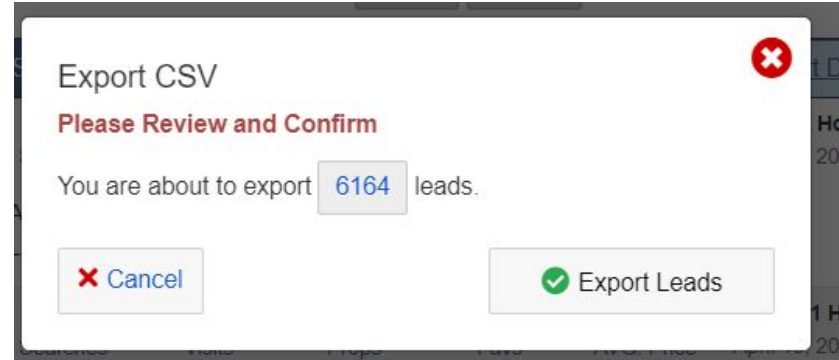


Confirm the export.

The Export File will be sent to your email address registered with RealGeeks.

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

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.



The email will come from
YOURWEBSITE@real-estate-request.com

The link will only be active 6 hours. Make the download happen ASAP.

Name your backup files for easy access. For example

2024_04_20_WebsiteName.csv

From: "Austinbestagent" <austinbestagent@real-estate-request.com>
To: bob@bobmccranie.com

Hi Bob,

Your lead export is complete. [Click here](#) to download it.

This link will expire in 6 hours.

