

How To Export An Enquiry

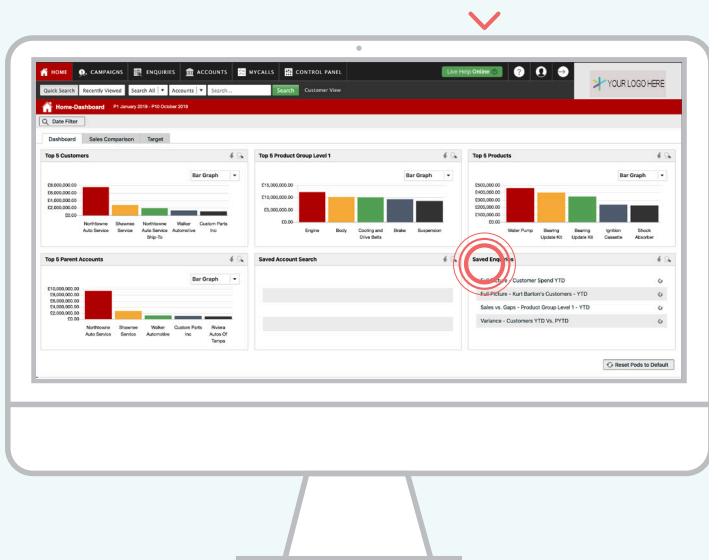
Desktop

You can export enquiries you create in sales-i, this can help if you wish to send reports via e-mail or feature them in a presentation.

01 FIND ENQUIRY

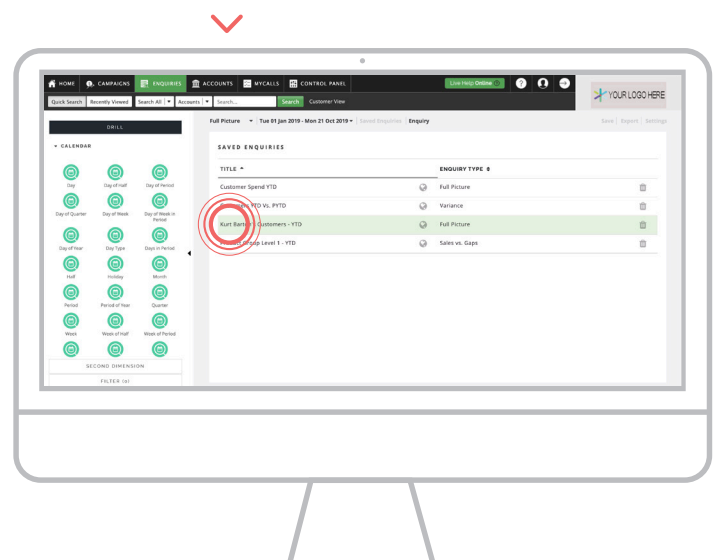
To export an enquiry, you first must create an enquiry or select a previously Saved Enquiry.

For this example, we will load an enquiry we have previously saved.



02 SELECT SAVED ENQUIRY

Double click on your chosen saved enquiry from the home page or Saved Enquiry section to load it.

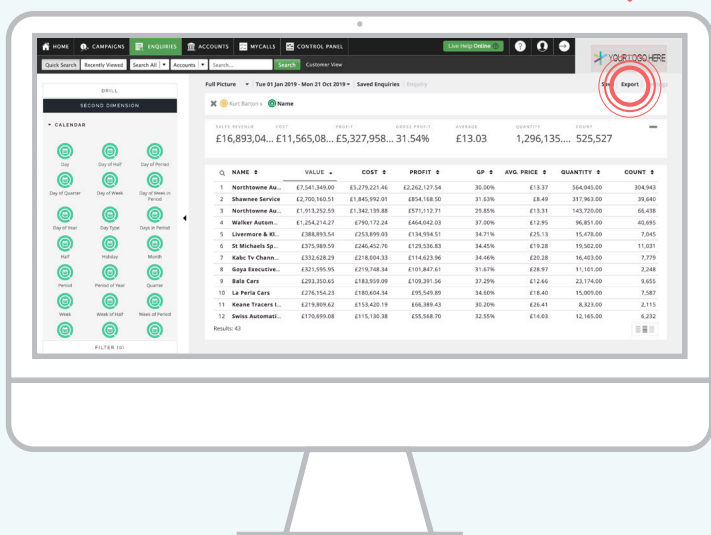


03

SELECT PRINT/EXPORT

Your selected enquiry will now have loaded.

Click on the Export button in the top right hand corner.



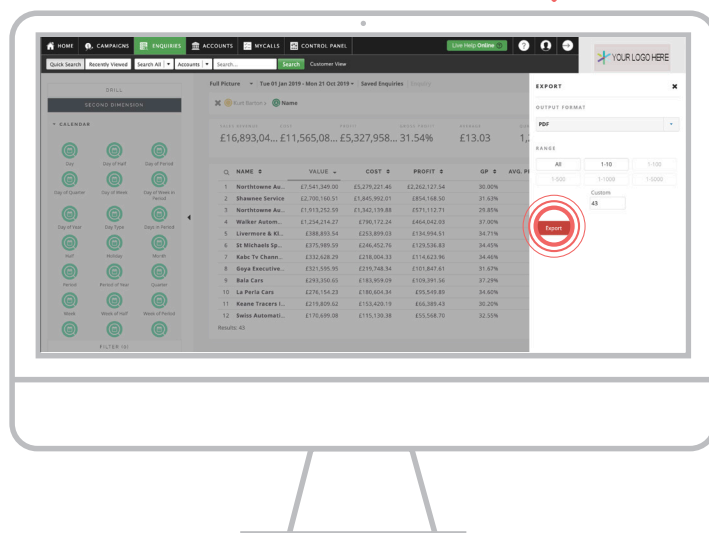
04

OPTIONS

Now you will see a menu with the options for your export.

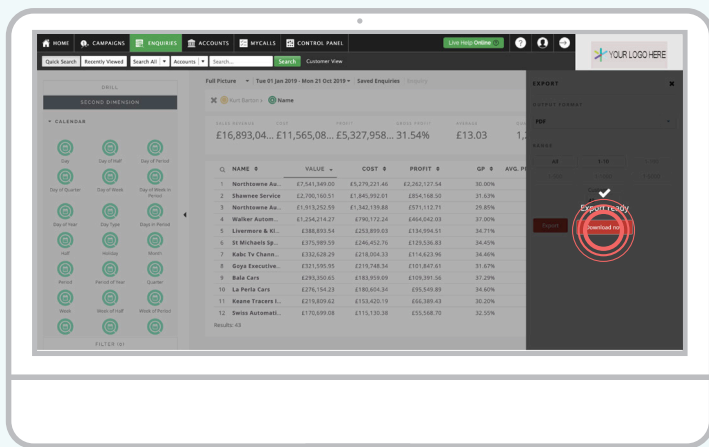
It will allow you to select the file type for the exported file as well as options for how many results you would like to include in the export.

When you are ready, click the red Export button to continue.



05 EXPORT

When your enquiry is ready, click the red Download now button to view it.



06 COMPLETED

Your exportable file is now ready to be viewed or emailed elsewhere as needed.

