

2018

ACT[®] Enroll[™] User Guide



www.act.org

Contact Information

Please direct all questions to ACT Customer Care, 8:30 a.m.-5:00 p.m. central time, Monday through Friday.

Phone: **319.337.1350**

Contact Us Form:

www.act.org/content/act/en/products-and-services/act-enrollment-management-services/act-enroll/contact-us.html

Contents

Difference Between ACT Enroll and EOS 1

Terminology and Definitions 2

Common Tasks 3

Getting Started 3

Settings 6

Creating a Market 7

Student Residence 7

Schools 10

Creating a Population 12

ACT EOS 12

PreACT 19

Creating an Order 24

Exporting Files from an Order 28

Exporting Populations 31

Difference Between ACT Enroll and EOS

ACT® Enroll™ is a platform to search for and purchase leads to recruit students for admission and enrollment. The platform gives you access to students who have taken the ACT® test or PreACT® and opted into the ACT Educational Opportunity Service (EOS).

This manual will help you understand ACT Enroll and guide you through the steps to set up an account.

Terminology and Definitions

Market: A geographical location used to identify the location of leads. A market must be created prior to creating a population.

- Market criteria can include US States, Territories, Segments, Counties, ZIP Codes, Countries, High Schools, and School Type.
- Segments have been updated from the previous EIS segments and are now ACT-defined groupings of counties that either constitute a Metropolitan Statistical Area (MSA) or a set of contiguous rural counties.

Population: A grouping of leads based on market, demographics, academics, and/or education plans.

- Selection criteria differ slightly based on the data source selected.

Data Source: The ACT source from which population data was derived.

- ACT Educational Opportunity Service: Individuals who opted into EOS when they took the ACT or PreACT test.

Enrollment Year: The year in which the student intends to enroll in college. For the initial stages of ACT Enroll, selecting an enrollment year will pre-select a High School Grad Class for the population. For example, selecting 2017–2018 will automatically select the High School Grad Class of 2017 for this population.

Prioritization: A user can prioritize their populations to indicate which population a lead who matches criteria for multiple populations should be assigned to.

Note: *Within certain sections of the ACT Enroll platform, you will see this icon:  Use your mouse to hover over the icon to access information about terms and procedures associated with different activities.*

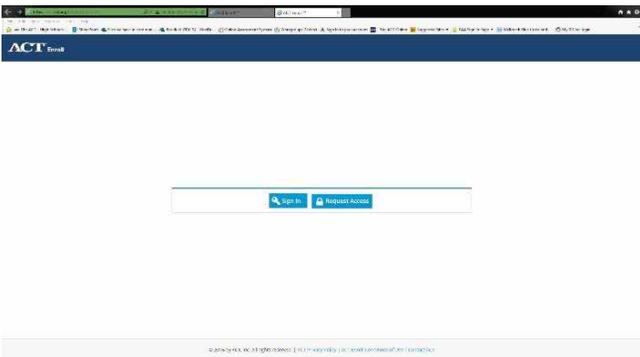
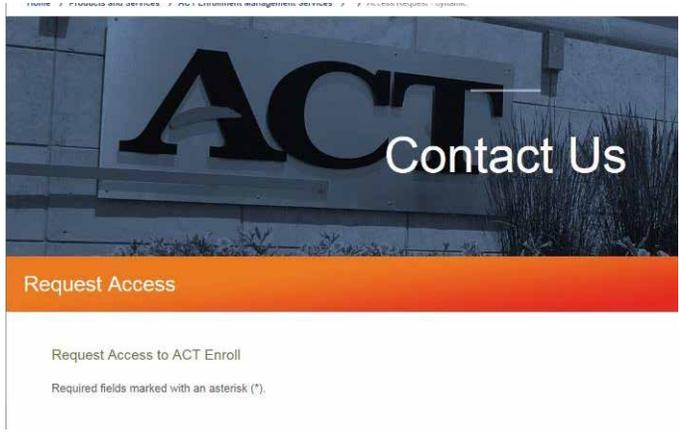
Common Tasks

Getting Started

First-time Setup

For current users who were migrated to ACT Enroll during the launch, skip Steps 1 and 2 and go to Step 3.

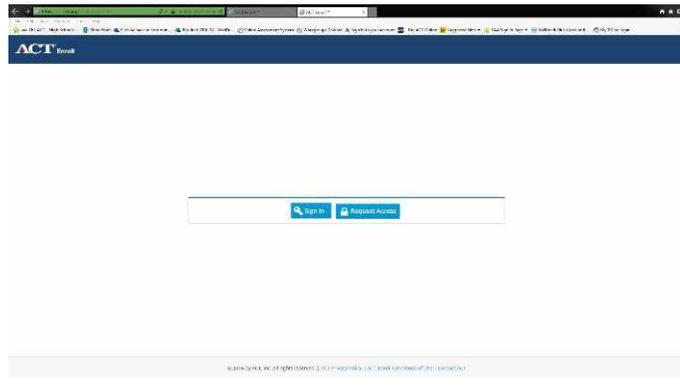
For new users who do not have an account for ACT Enroll, take the following steps to set up an ACT Enroll account:

Step	Action	Image
1	Request access to ACT Enroll. Go to the ACT Enroll application (https://pse.act.org/Enroll) and select Request Access . You'll be taken to a page on the ACT website.	 A screenshot of a web browser displaying the ACT Enroll website. The browser's address bar shows the URL https://pse.act.org/Enroll. The website has a dark blue header with the ACT Enroll logo. Below the header, there is a white navigation bar with a search icon and a 'Request Access' button. The rest of the page is mostly blank with some faint text at the bottom.
2	Follow the on-screen instructions to complete the request access application and select Submit . ACT staff will decide whether to approve your request for access. If you don't have an ACT user account yet, you will be sent an email with information to complete your ACT account setup before you can sign into ACT Enroll. If you already have an ACT user account, you'll be sent an email confirmation with your ACT Enroll role. Note: If ACT cannot approve your request for access to ACT Enroll, you'll be notified by email. Contact ACT if you have questions.	 A screenshot of the ACT website's 'Contact Us' page. The page features a large 'ACT' logo and the text 'Contact Us' in white on a dark background. Below this, there is an orange banner with the text 'Request Access'. Underneath the banner, there is a form titled 'Request Access to ACT Enroll' with a note that 'Required fields marked with an asterisk (*)'.

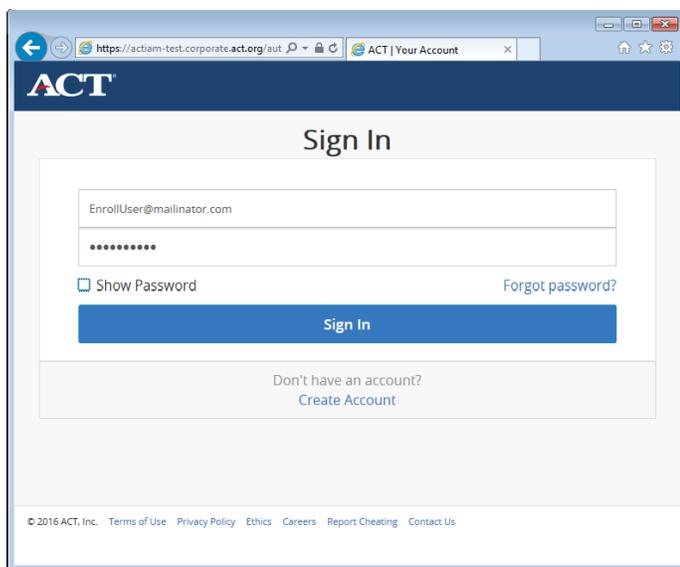
Step Action

Image

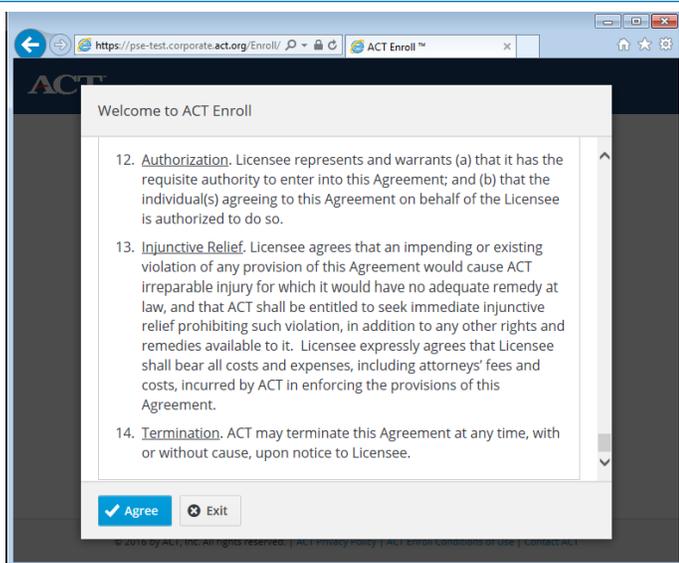
- 3 When you have completed your account setup, go to the ACT Enroll Application (<https://pse.act.org/Enroll>). Select **Sign In**.



- 4 Enter your username and password. Select **Sign In**.



- 5 Read through the ACT Enroll User Agreement. Once you have scrolled to the bottom, select **Agree** if you agree to the terms.



Step Action

- 6 Follow the on-screen instructions to create an abbreviation for your organization(s). In this example, the organization has been abbreviated as "MVNU". Then, select **Done**.

Image

ACT Enroll™

https://pse-test.corporate.act.org/Enroll/

Create Abbreviation

WELCOME ENROLL USER !

For the organization(s) listed below, please create an abbreviation that is 8 characters or less. Each abbreviation you enter is unique to you and can be changed in Settings at any time.

For example, if your institution is Alpha State University, you might enter ASU, or Alpha, or Alpha U, etc.

ORGANIZATION: MOUNT VERNON NAZARENE UNIVERSITY

ABBREVIATION *: MVNU

Done

- 7 Select the billing address for your organization(s), or add a new billing address by selecting **Add new billing address** and filling out the fields. Then, select **Save & Close**.

Note: The billing address and billing contact you select are where the invoices for your purchases in ACT Enroll will be sent.

ACT Enroll™

https://pse-test.corporate.act.org/Enroll/

Billing Information

BILLING ADDRESS * [Add new billing address](#)

Please select your billing information for MOUNT VERNON NAZARENE UNIVERSITY

MOUNT VERNON NAZARENE UNIVERSITY
800 MARTINSBURG RD
MOUNT VERNON, OH, 43050
US

Save & Close Cancel Next

- 8 Select the billing contact for your organization(s), or add a new billing contact by selecting **Add new billing contact** and filling out the fields. Then, select **Save & Close**.

Note: You can return to the earlier section using the **Back** button.

ACT Enroll™

https://pse-test.corporate.act.org/Enroll/

Billing Information

BILLING CONTACT * [Add new billing contact](#)

ACCOUNTS PAYABLE RANDI TIMPE

E B BROOKS TIMOTHY EADES

JAMES MAHAN JAMES SMITH

CHAWN FLEMING ANDREA LECHLEITNER

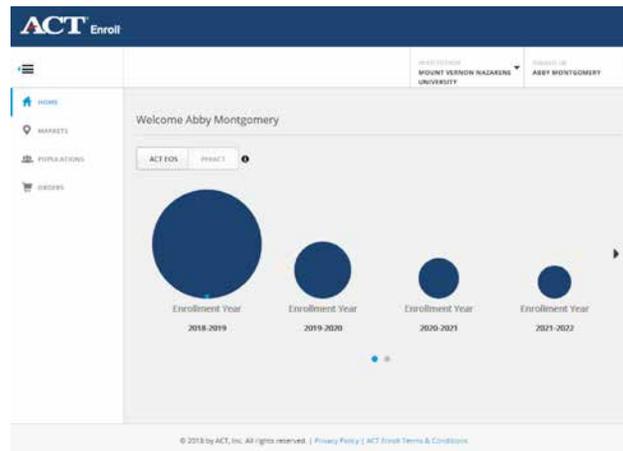
NANCY JO THOMPSON AMY HOUSE

ROBYN CROW

Save & Close Cancel Back

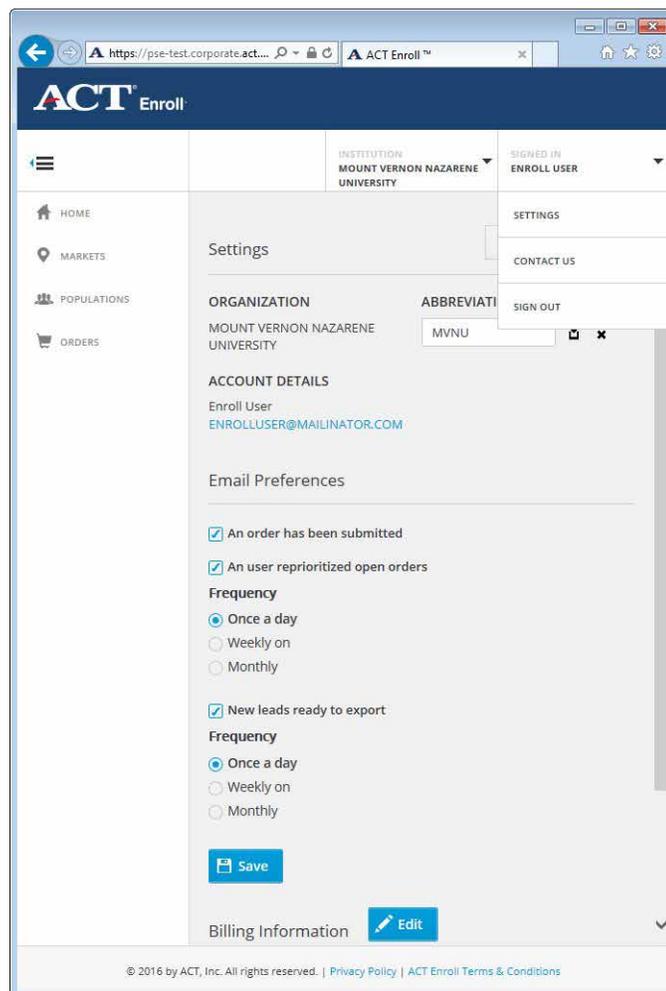
Step Action

- 9 Once you have completed the above steps, you will be brought to the **Home** screen. You'll notice 3 other menu options to the left (**Markets, Populations, Orders**), which you will use throughout the application. We'll go over each of these options in the upcoming sections.

Image**Settings**

To access user settings at any time, select the drop-down menu containing your user name in the top right corner of the screen. Select **Settings**. Here, you can:

- Select My Account to view and edit your user account details, such as email address, password, security questions, customer service PIN, and organization & roles
- View and edit your organization's abbreviation
- View and edit your email preferences for receiving information from ACT Enroll
- View and edit your billing information



Creating a Market

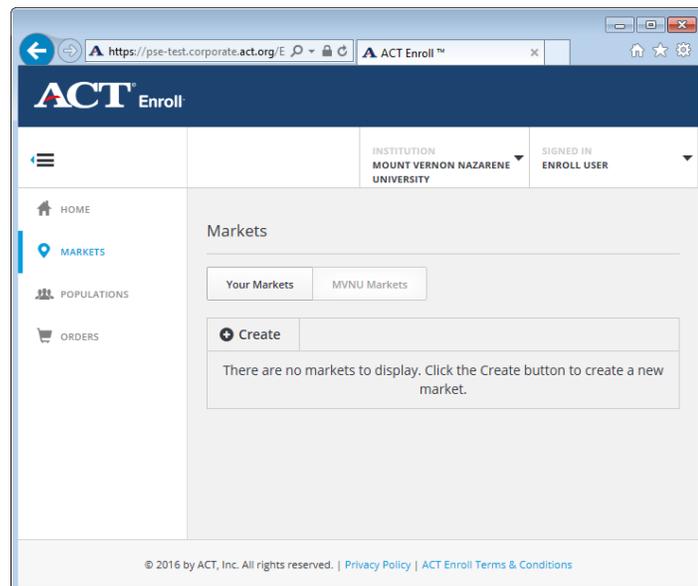
To create a market, select **Markets** on the left side of the screen. The Markets page will appear. Here, you can create student residence and school markets, view markets you created, and view the markets created by other users for your organization.

Student Residence

To create a market for **student residences**, take the following steps:

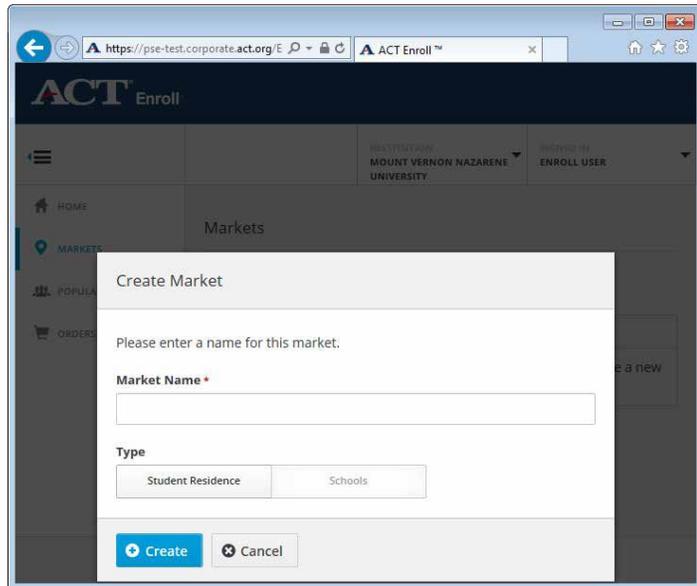
Step	Action	Image
------	--------	-------

1	Select Create .	
---	------------------------	--



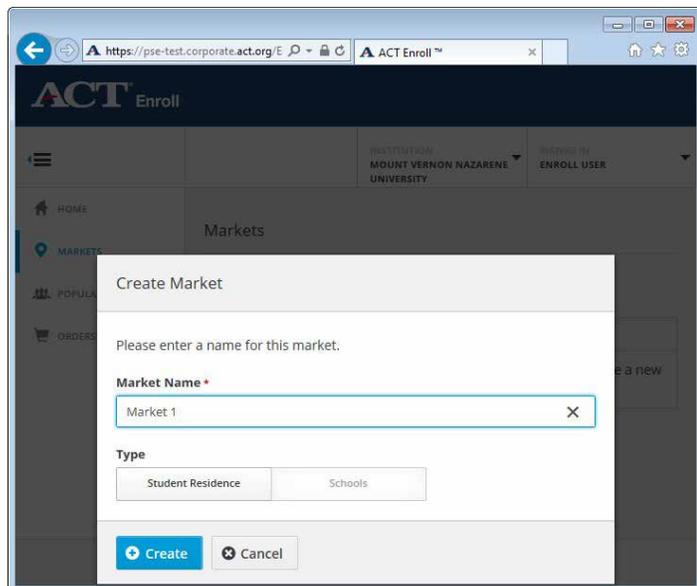
Step Action

- 2 Enter a name for the market.
Select **Student Residence**.

Image

- 3 Select **Create**.

Note: The first time you create a *Student Residence* market you may experience a delay while the map data loads.



Step Action

- 4 Follow the on-screen instructions to select the desired market criteria. You can make selections based on:

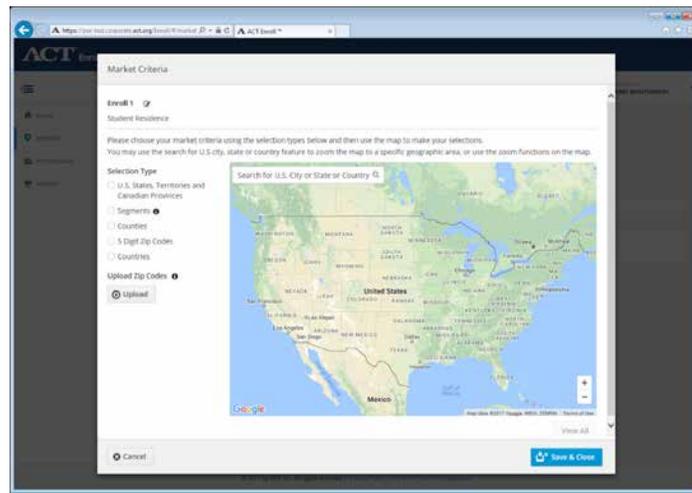
- US States, Territories, and Canadian Provinces
- Segments
- Counties
- 5-Digit ZIP Codes
- Countries

You can also Upload ZIP Codes by selecting the **Upload** button.

Choose a **Selection Type**. Then, use the map to select the specific geographic areas for your market. When choosing Segments, Counties, or 5-Digit ZIP Codes, you will be asked to provide a state name to zoom the map.

You may manually zoom in on an area on the map by using the Search for **US City or State or Country** search box or by using the zoom icons. (You can view your selections on the entire map by selecting **View All**.)

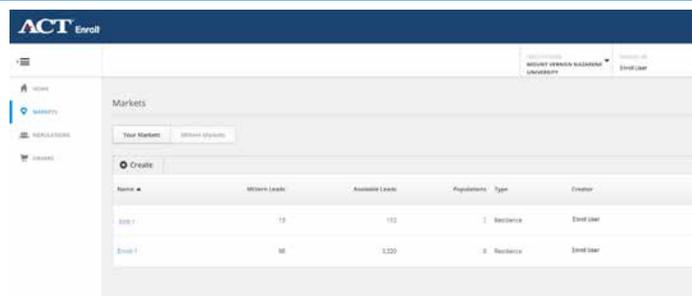
Once the desired criteria are selected, select **Save & Close**.

Image

- 5 Your new market will now be visible on the Markets page. Here you can view:

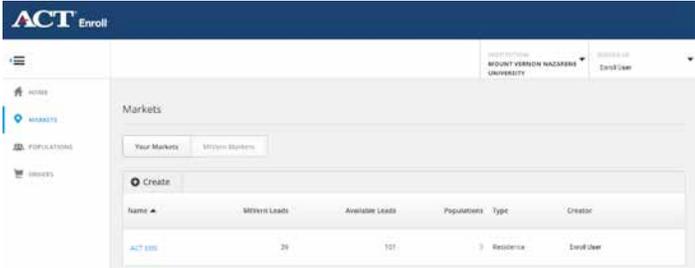
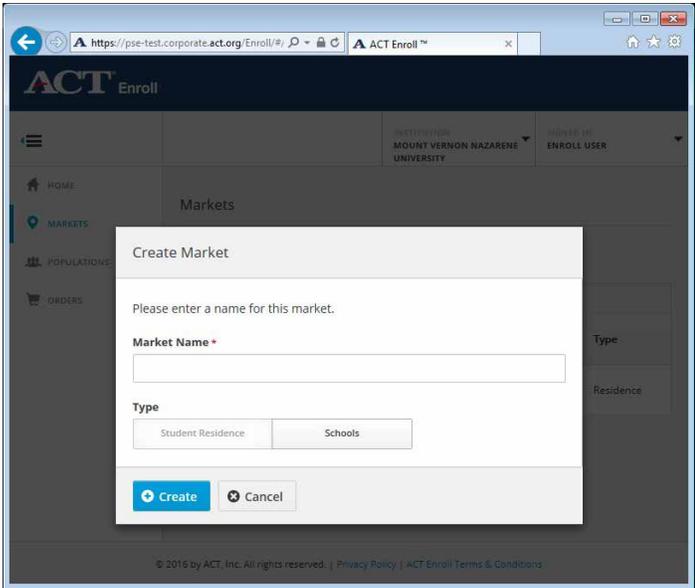
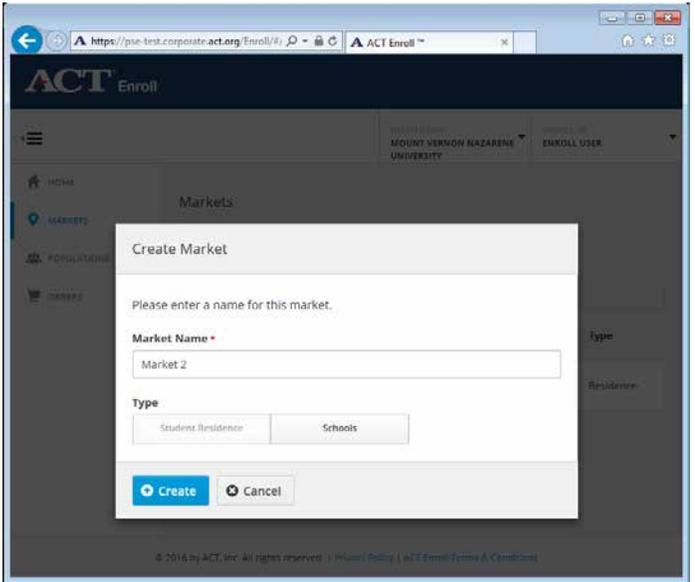
- Name
- (Organization Name) Leads
- Available Leads
- Populations
- Type (Student Residence or Schools)
- Creator

Note: (Organization Name) Leads are the leads purchased by your organization that match the market. Available Leads are the leads that are available for purchase using that market. Populations are the number of populations the market is in.



Schools

To create a market for **schools** (based on the address of schools), take the following steps:

Step	Action	Image
1	Select Create . <i>Note: The first time you create a School market you may experience a delay while the map data loads.</i>	
2	Enter a name for the market. Select Schools .	
3	Select Create .	

Step Action

- 4 You can make selections based on school type and/or school name. First, filter schools by US City, State/ Province, or Country.

You may zoom in on the map by using the zoom icons.

You can filter schools by:

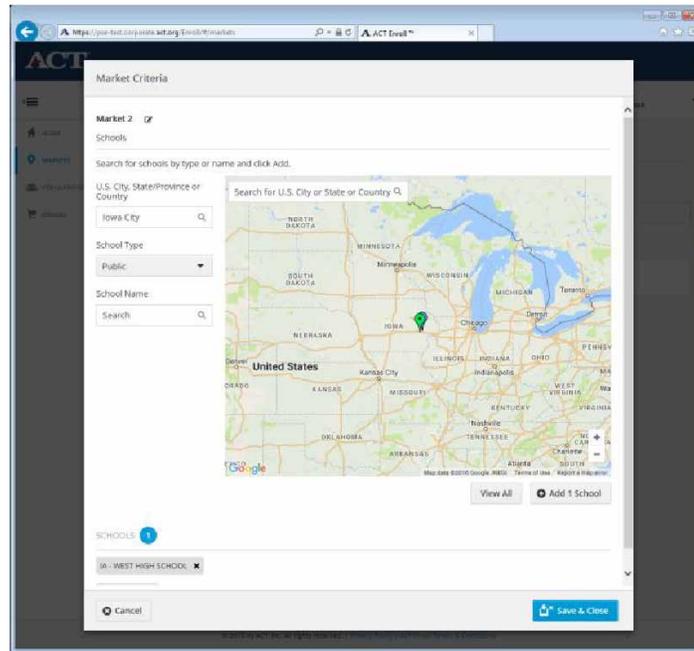
- Selecting a School Type
- Entering a School Name

You may add schools by selecting the **Add** button or you may add individual schools by selecting the flag on the map.

You may remove a school by clicking the flag on the map to deselect it or by clicking the 'X' on the school's tag.

Once you have added the desired schools, select **Save & Close**.

Image

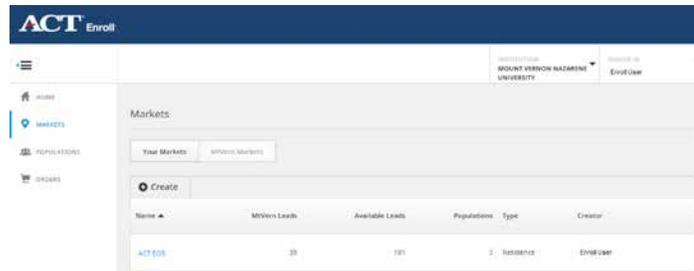


- 5 Your new market will now be visible on the Markets page. Here you can view:

- Name
- (Organization Name) Leads
- Available Leads
- Populations
- Type (Student Residence or Schools)
- Creator

Note: (Organization Name)

Leads are the leads purchased by your organization that match the market. Available Leads are the leads that are available for purchase using that market. Populations are the number of populations the market is in.

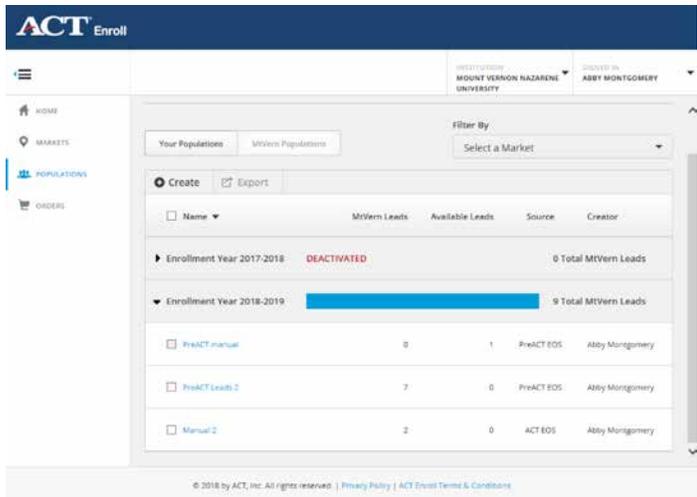


Creating a Population

To create a population, select **Populations** on the left side of the screen. The **Populations** page will appear. Here, you can create populations, view populations you created, and view the populations created by other users for your organization. You can also filter the populations by a market to see all of the populations linked to that market.

ACT EOS

To create a new population for ACT EOS, take the following steps:

Step	Action	Image																														
1	Select Create .	 <p>The screenshot shows the ACT Enroll interface. On the left is a navigation menu with 'POPULATIONS' selected. The main content area has a 'Filter By' dropdown set to 'Select a Market'. Below this is a 'Create' button and an 'Export' button. A table displays population data:</p> <table border="1"><thead><tr><th>Name</th><th>MtVern Leads</th><th>Available Leads</th><th>Source</th><th>Creator</th></tr></thead><tbody><tr><td colspan="5">Enrollment Year 2017-2018 DEACTIVATED 0 Total MtVern Leads</td></tr><tr><td colspan="5">Enrollment Year 2018-2019 9 Total MtVern Leads</td></tr><tr><td>PrACT-manual</td><td>0</td><td>1</td><td>PrACT EOS</td><td>Abby Montgomery</td></tr><tr><td>PrACT Leads 2</td><td>7</td><td>0</td><td>PrACT EOS</td><td>Abby Montgomery</td></tr><tr><td>Manual 2</td><td>2</td><td>0</td><td>ACT EOS</td><td>Abby Montgomery</td></tr></tbody></table>	Name	MtVern Leads	Available Leads	Source	Creator	Enrollment Year 2017-2018 DEACTIVATED 0 Total MtVern Leads					Enrollment Year 2018-2019 9 Total MtVern Leads					PrACT-manual	0	1	PrACT EOS	Abby Montgomery	PrACT Leads 2	7	0	PrACT EOS	Abby Montgomery	Manual 2	2	0	ACT EOS	Abby Montgomery
Name	MtVern Leads	Available Leads	Source	Creator																												
Enrollment Year 2017-2018 DEACTIVATED 0 Total MtVern Leads																																
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PrACT-manual	0	1	PrACT EOS	Abby Montgomery																												
PrACT Leads 2	7	0	PrACT EOS	Abby Montgomery																												
Manual 2	2	0	ACT EOS	Abby Montgomery																												

Step Action

- 2 Enter a name for the population. Select:
 - An enrollment year
 - **ACT Educational Opportunity Service** under **Source**
 - A contact method

Image

ACT Enroll

Populations

Create Population

Please enter a name, enrollment year, source, and contact method for this population.

Name *

Enrollment Year *

Select One

Source *

Select One

Contact Method *

Select One

Create Cancel

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- 3 Once you have entered the desired name and settings, select **Create**.

ACT Enroll

Populations

Create Population

Please enter a name, enrollment year, source, and contact method for this population.

Name *

Population 2

Enrollment Year *

2016-2017

Source *

ACT Educational Opportunity Service

Contact Method *

Student record must contain both mailing address and email address

Create Cancel

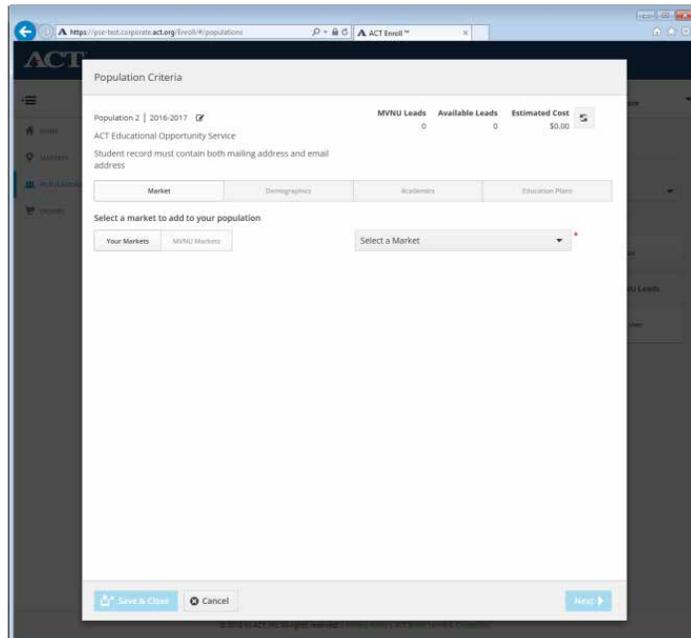
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Step Action

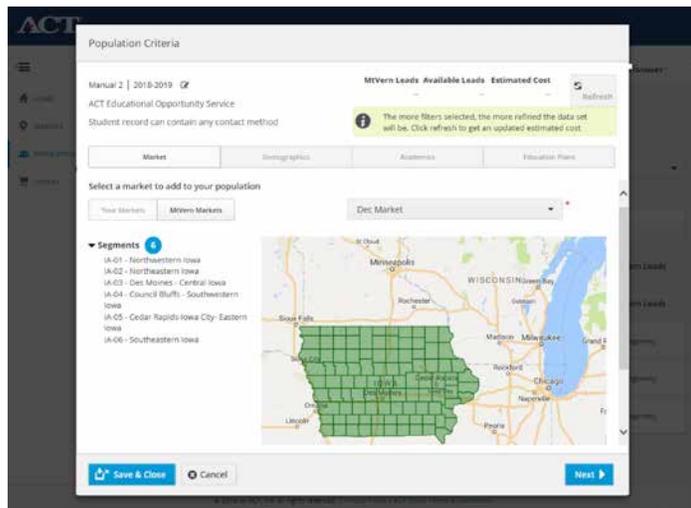
- The **Population Criteria** menu appears. Select either **Your Markets** or **(Organization Name) Markets**, then select a market for your population from the drop-down menu on the right.

Note: Selecting the refresh button  while editing search criteria will update the number of leads that match your selection.

Image



- The market you selected and a map appear on the screen. Select **Next**, or select the **Demographics** tab located above the market information.



Step Action

6 The **Demographics** page appears. Here, you can select demographic information, such as

- Gender
- Race/Ethnicity
- US Citizenship
- Family Income
- Physical/Learning Disability
- Religion
- Parental Education

Select demographic information by choosing the appropriate checkboxes under each section. The more filters you select, the more refined the data set will be.

Select the caret (>) to expand each section. Selecting the check-box in the section heading will select all in that category. Once you are satisfied with your selections, select **Next**, or select the **Academics** tab.

Image

The screenshot shows the 'Population Criteria' form with the 'Demographics' tab selected. The form includes a header with 'Manual 2 | 2018-2019', 'ACT Educational Opportunity Service', and 'Student record can contain any contact method'. A yellow notification box states: 'The more filters selected, the more refined the data set will be. Click refresh to get an updated estimated cost'. The 'Demographics' section contains several expandable categories: 'High School Graduation Class' (set to 2018), 'Gender', 'Race/Ethnicity', 'Citizenship', 'Family Income', 'Physical / Learning Disability', 'Religion', and 'Parental Education'. Each category has a caret (>) and a checkbox. At the bottom, there are buttons for 'Save & Close', 'Cancel', 'Back', and 'Next'.

7 The **Academics** page appears. Here, you can select academic information, such as:

- High School GPA
- ACT test score range
- Class Rank
- High School Curriculum
- Years Subjects Studied (English, Mathematics, Social Studies, Natural Sciences, and Foreign Language)
- Type of High School

Note: The ACT test score range must be separated by at least 3 points.

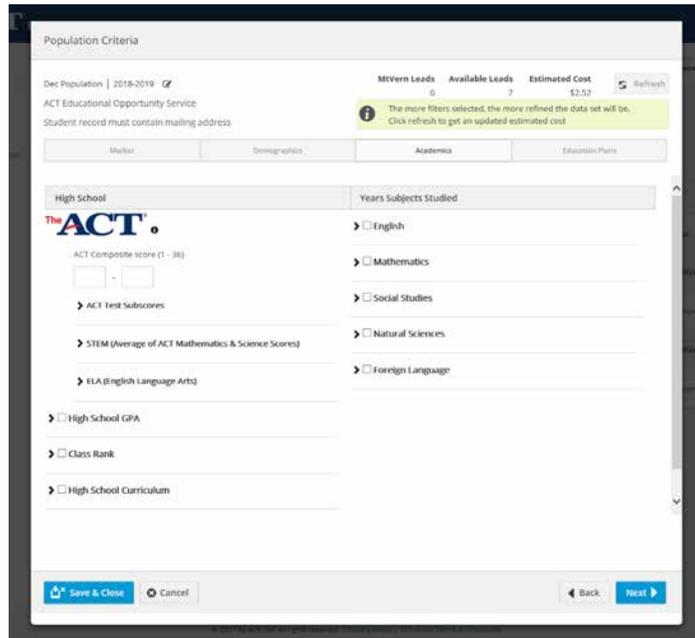
The screenshot shows the 'Population Criteria' form with the 'Academics' tab selected. The form includes the same header as the previous screenshot. A yellow notification box states: 'The more filters selected, the more refined the data set will be. Click refresh to get an updated estimated cost'. The 'Academics' section contains several expandable categories: 'High School' (with 'ACT Composite score (1 - 36)' and a range input), 'ACT Test Subscores', 'STEM (Average of ACT Mathematics & Science Scores)', 'ELA (English Language Arts)', 'High School GPA', 'Class Rank', and 'Years Subjects Studied' (with sub-sections for English, Mathematics, Social Studies, Natural Sciences, and Foreign Language). Each category has a caret (>) and a checkbox. At the bottom, there are buttons for 'Save & Close', 'Cancel', 'Back', and 'Next'.

Step Action

- 8 Select the caret (>) to expand each section.

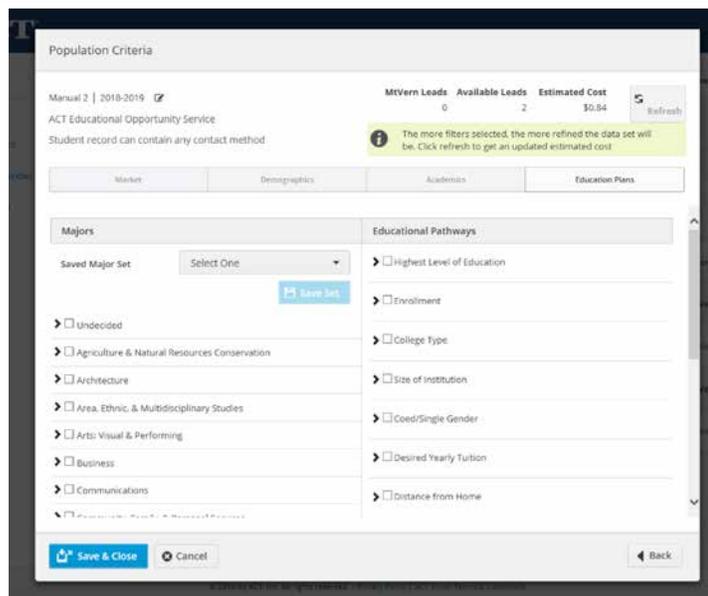
Select academic information by choosing the appropriate checkboxes and entering test scores. Once you are satisfied with your selections, select **Next**, or select the **Education Plans** tab.

Image



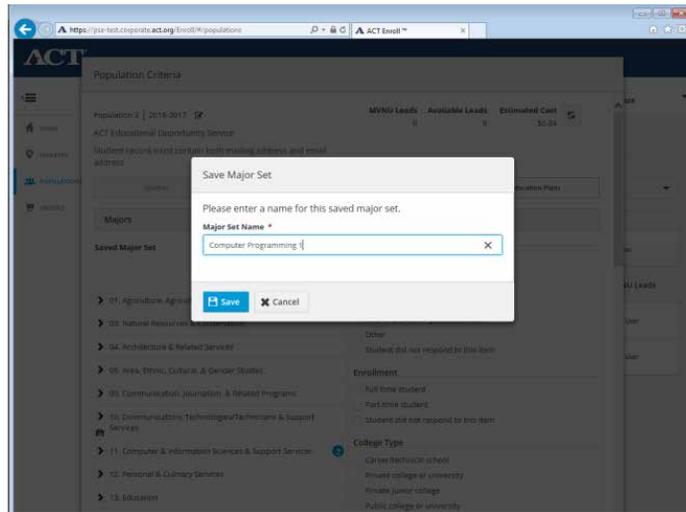
- 9 The **Education Plans** page appears. Here, you can:
 - Select majors and save them into major sets
 - Select and add educational pathways

Select the desired major(s) by using the drop-down menus and submenus, and then the checkboxes. A number icon will appear to the right of the list, to help you keep track of your selections.



Step Action

- 10 If desired, you can save the selected majors into a set that can be loaded for future use by selecting **Save Set**. Enter the desired name for the set and select **Save**. The major set will now be available for future use in other populations.

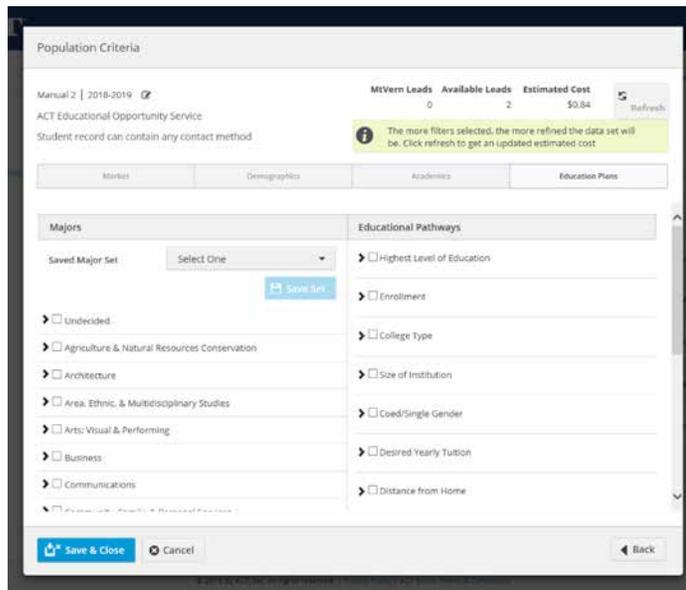
Image

- 11 Using the **Educational Pathways** section on the right side of the page, you can select:

- Highest Level of Education
- Enrollment
- College Type
- Size of Institution
- Coed/Single Gender
- Desired Yearly Tuition
- Distance from Home
- Living Plans
- College Extracurricular Plans

Select educational pathways by placing checks in the appropriate boxes within the categories listed above. You will need to scroll down to see all the options.

When you are satisfied with all of your criteria selections for your population, select **Save & Close**.



Step Action

12 Your new population will be visible on the Populations page. Here you can view:

- Name
- (Organization Name) Leads
- Available Leads
- Purchase When Available Leads
- Source (ACT EOS or PreACT™)
- Creator

Note: (Organization Name) Leads are the leads purchased by your organization that match the population. Available Leads are the leads that are available for purchase for the population.

Image

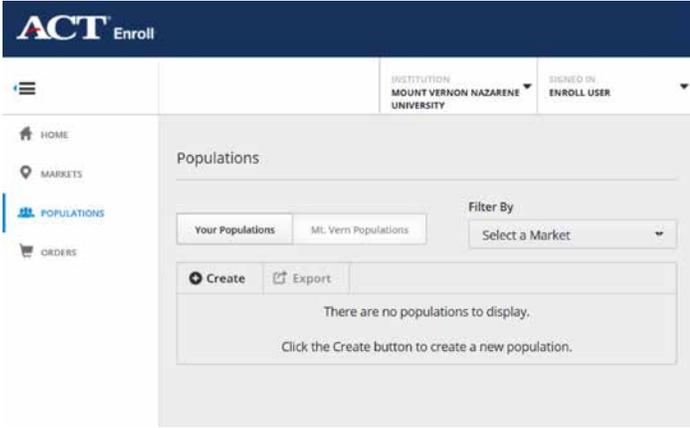
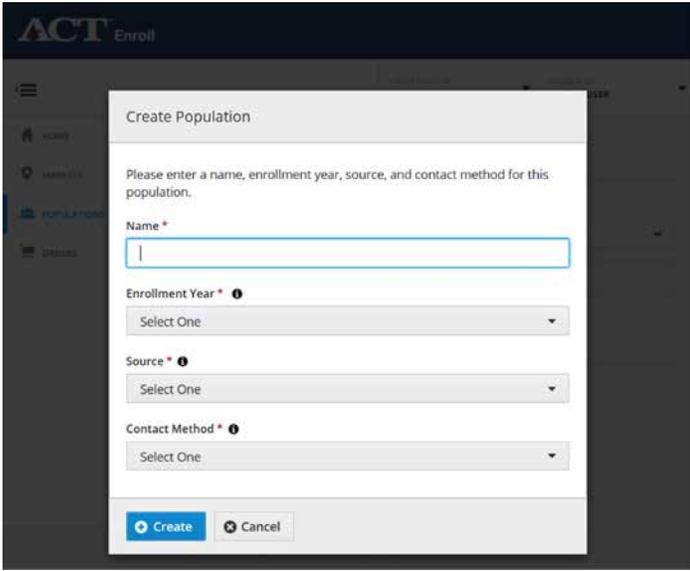
The screenshot shows the ACT Enroll interface. The top navigation bar includes the ACT Enroll logo and user information for Mount Vernon Nazarene University and Abbey Montgomery. The main content area is titled 'Your Populations' and features a 'Filter By' dropdown set to 'Select a Market'. Below this is a table with columns: Name, MtVern Leads, Available Leads, Source, and Creator. The table is divided into two sections: 'Enrollment Year 2017-2018' (DEACTIVATED) and 'Enrollment Year 2018-2019'. The 2018-2019 section shows three rows of data.

Name	MtVern Leads	Available Leads	Source	Creator
Enrollment Year 2017-2018 DEACTIVATED 0 Total MtVern Leads				
Enrollment Year 2018-2019 9 Total MtVern Leads				
PreACT manual	0	1	PreACT EOS	Abbey Montgomery
PreACT Leads 2	7	0	PreACT EOS	Abbey Montgomery
Manual 2	2	0	ACT EOS	Abbey Montgomery

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PreACT

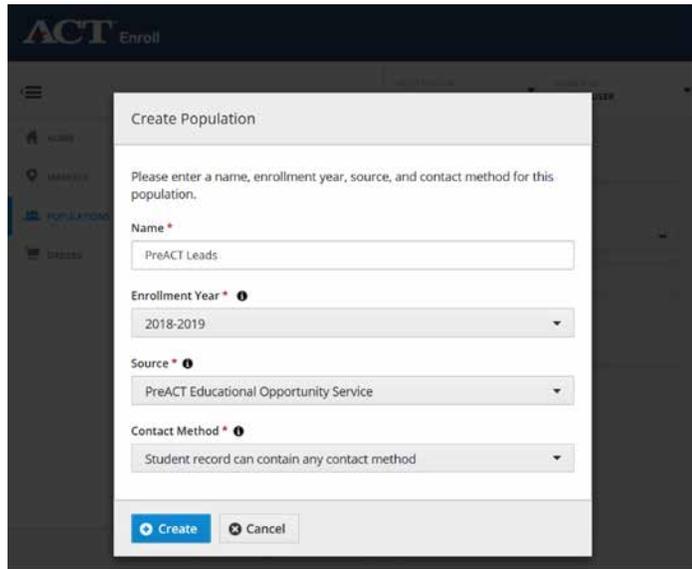
To create a new population for PreACT, take the following steps:

Step	Action	Image
1	Select Create .	 <p>The screenshot shows the ACT Enroll interface. The top navigation bar includes the ACT Enroll logo, a hamburger menu, and user information: INSTITUTION (MOUNT VERNON NAZARENE UNIVERSITY) and SIGNED IN (ENROLL USER). The left sidebar contains navigation options: HOME, MARKETS, POPULATIONS (highlighted), and ORDERS. The main content area is titled 'Populations' and features a 'Filter By' dropdown set to 'Select a Market'. Below the filter are two tabs: 'Your Populations' and 'Mt. Vern Populations'. A 'Create' button with a plus icon and an 'Export' button with a download icon are visible. A message states: 'There are no populations to display. Click the Create button to create a new population.'</p>
2	Enter a name for the population. Select: <ul style="list-style-type: none"> An enrollment year PreACT Educational Opportunity Service under Source A contact method 	 <p>The screenshot shows the 'Create Population' modal form. The title is 'Create Population'. Below the title is a prompt: 'Please enter a name, enrollment year, source, and contact method for this population.' The form contains four required fields: 'Name *' (a text input field), 'Enrollment Year *' (a dropdown menu with 'Select One' selected), 'Source *' (a dropdown menu with 'Select One' selected), and 'Contact Method *' (a dropdown menu with 'Select One' selected). At the bottom of the form are two buttons: 'Create' (with a plus icon) and 'Cancel' (with an X icon).</p>

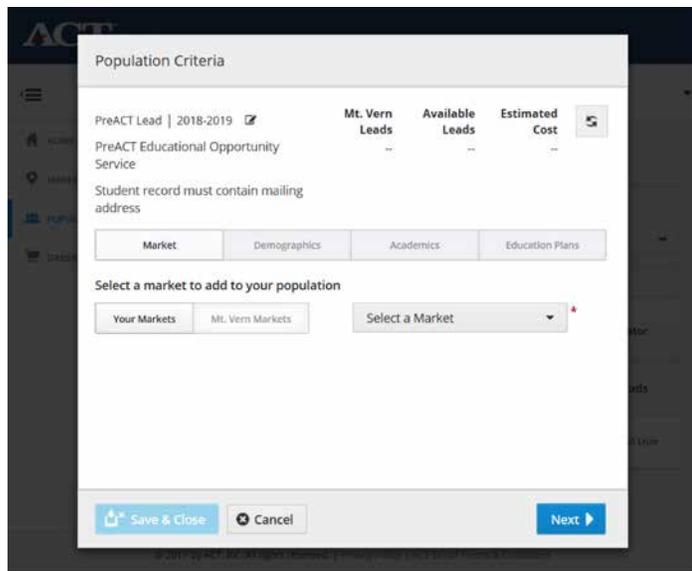
Step Action

- 3 Once you have entered the desired name and settings, select **Create**.

Image

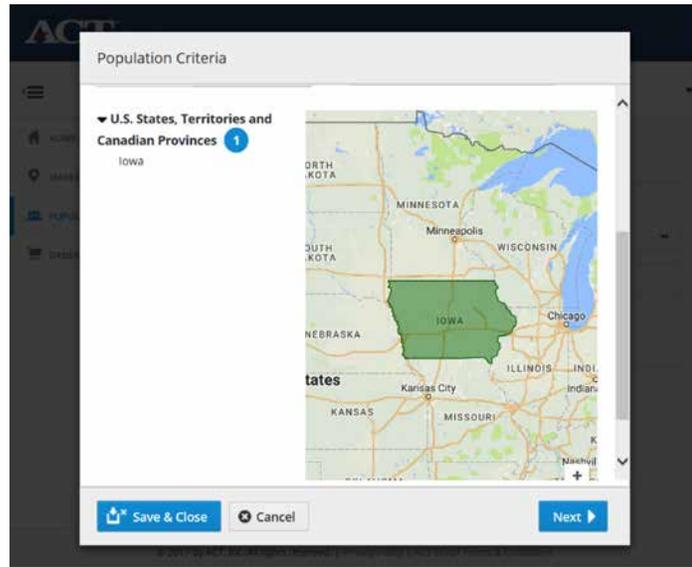


- 4 The **Population Criteria** menu appears. Select either **Your Markets** or **(Organization Name) Markets**, then select a market for your population from the drop-down menu on the right.



Step Action

- 5 The market you selected and a map appear on the screen. Select **Next**, or select the **Demographics** tab located above the market information.

Image

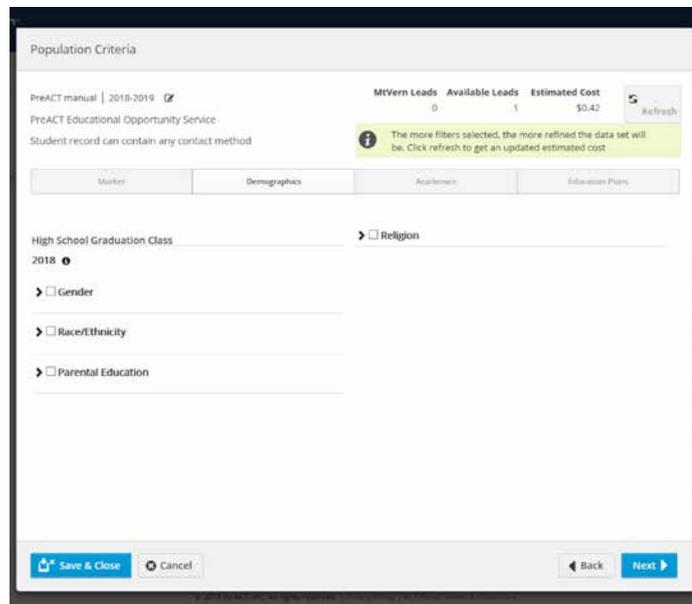
- 6 The **Demographics** page appears on the screen. Here, you can select demographic information, such as

- Gender
- Race/Ethnicity
- Parental Education
- Religious Affiliation

Select demographic information by choosing the appropriate checkboxes under each section. You may need to scroll down to see all the options. Once you are satisfied with your selections, select **Next**, or select the **Academics** tab.

Note: Selecting the refresh button  while editing search criteria will update the number of leads that match your selection.

Select the caret (>) to expand each section. Selecting the check-box in the section heading will select all in that category. The more filters you select, the more refined the data set will be.



Step Action

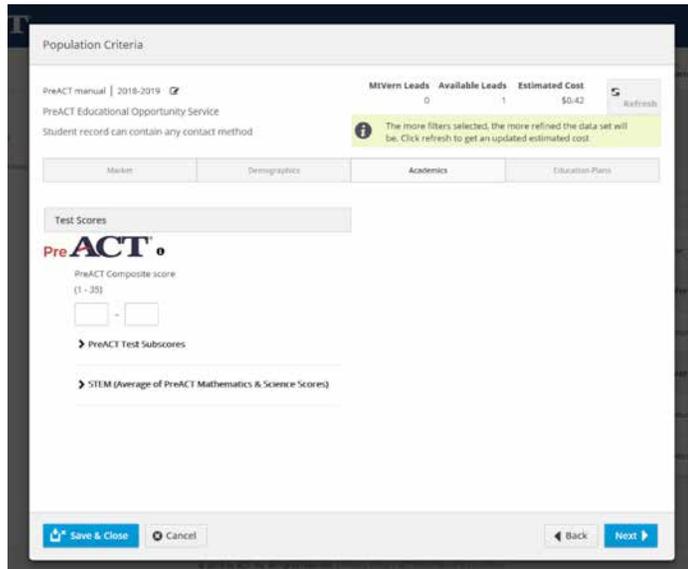
7 The **Academics** page appears. Here, you can select academic information, such as:

- PreACT test score range
- STEM score range

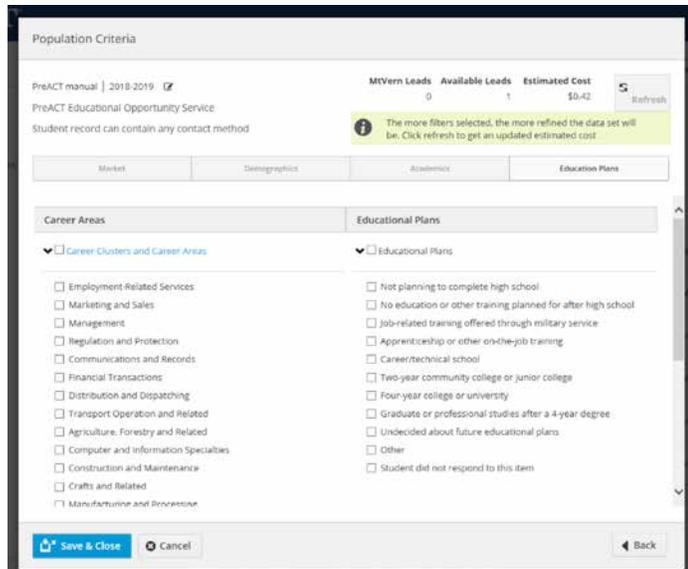
Note: The PreACT test score range must be separated by at least 3 points.

Once you are satisfied with your selections, select **Next**, or select the **Education Plans** tab.

Image



8 The **Educational Plans** tab appears. Here, you can select from education plans and career areas of interest.



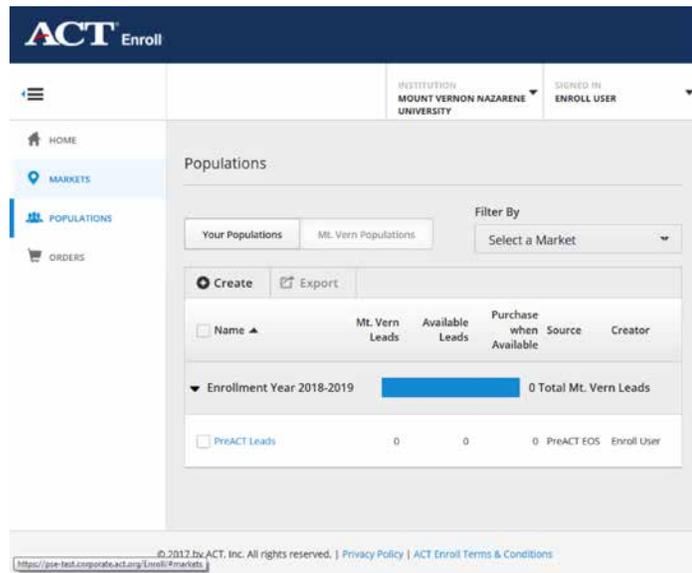
Step Action

9 Your new population will be visible on the Populations page. Here you can view:

- Name
- (Organization Name) Leads
- Available Leads
- Purchase When Available Leads
- Source (ACT EOS or PreACT)
- Creator

Note: (Organization Name)
Leads are the leads purchased by your organization that match the population. Available Leads are the leads that are available for purchase for the population.

Image

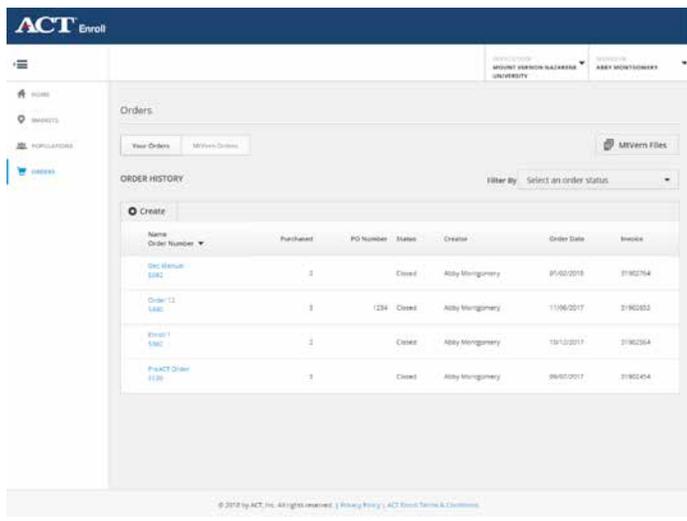


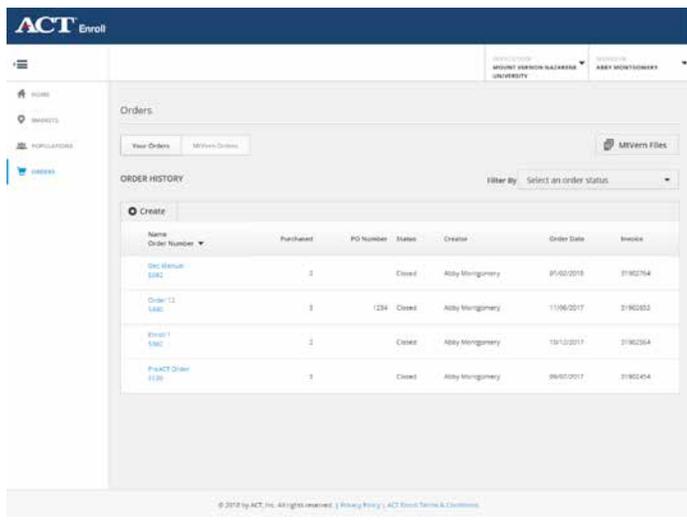
Creating an Order

To create an order, select Orders on the left side of the screen. The Orders page will display. Here, you can create orders if you are authorized to make purchases for your organization, view orders you created, and view orders created by other users for your organization. You can also filter orders by status. The order statuses are:

- Draft
- Closed
- Canceled

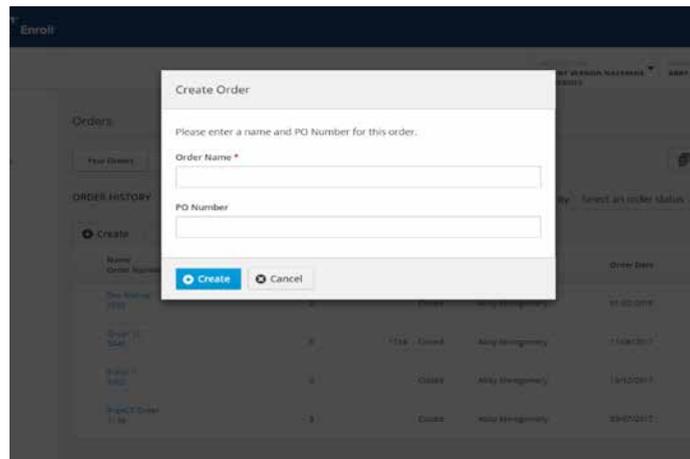
To create an order, take the following steps:

Step	Action	Image
1	Select Create .	



Step Action

- 2 Enter an order name and a PO number, if applicable. Select **Create**.

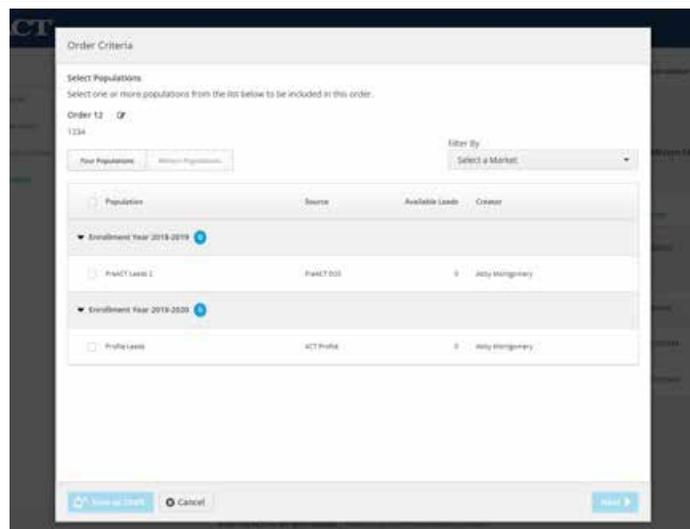
Image

- 3 The **Order Criteria – Select Populations** page displays. Here, you can:
- View both personal and organizational populations
 - Filter by market to view populations with that market
 - Select populations to be added to the order

Select one or more populations from the list to be included in the order by using the checkboxes next to the desired population name(s). You can also use the checkbox at the top of the list to select all the populations.

Once you are satisfied with your selections, select **Next**. You'll then see a window while the system generates information for the next step; there may be a slight delay during this time.

Note: If at any time you wish to close out of your order criteria and continue at a later time, select **Save as Draft**.



Step Action

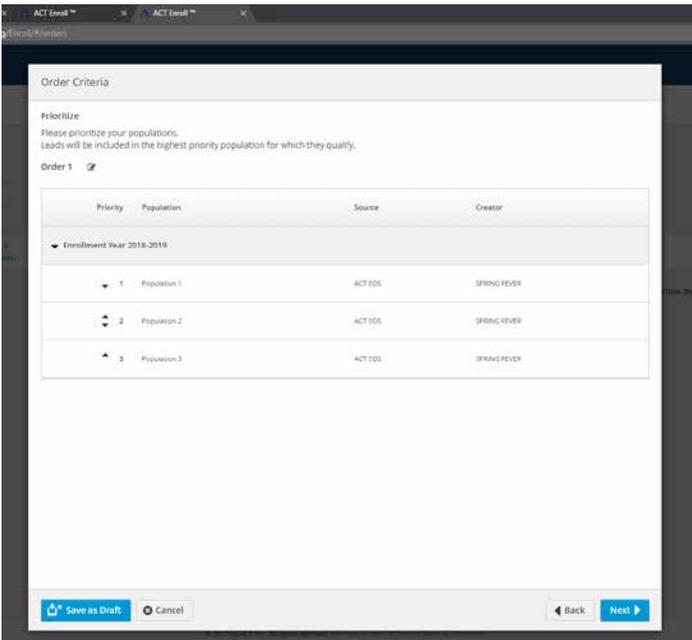
- 4 The **Order Criteria – Prioritize** page displays. Here you can prioritize your populations if you selected more than one population for an enrollment year. Leads that match more than one population will be appointed to the population you assign the highest priority.

Use the up-down arrows to the left of the priority numbers to change the priority order of populations that are listed on the screen for each enrollment year.

Once you are satisfied with your selections, select **Next**.

Note: If at any time you wish to close out of your order criteria and continue at a later time, select **Save as Draft**.

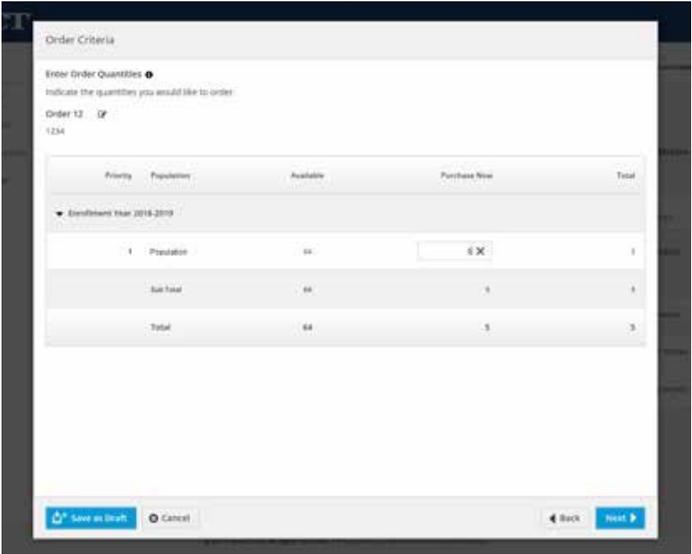
Image



- 5 The **Order Criteria – Enter Order Quantities** page displays. On this screen you indicate the quantities you would like to order.

There are two ways to order leads:

- For those populations that have leads **Available** now, enter a quantity up to the total number available in the **Purchase Now** column. Doing this will purchase the leads and export the associated data as soon as the order is placed.

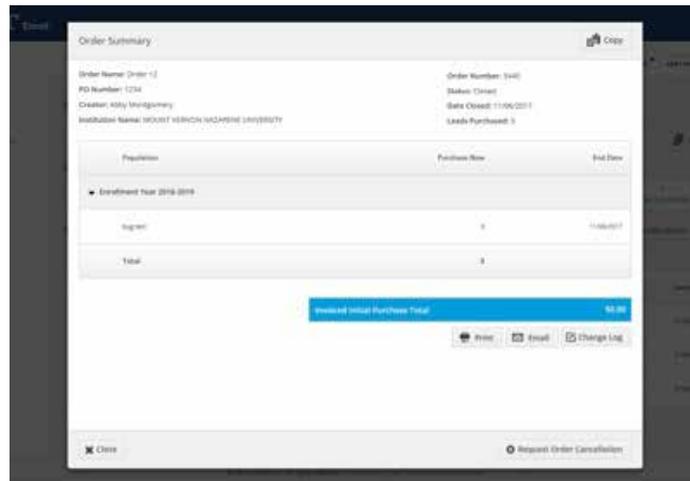


Step Action

Once you are satisfied with your selections, select **Next**.

Note: ACT Enroll will display an error message if you forget to order leads for any population.

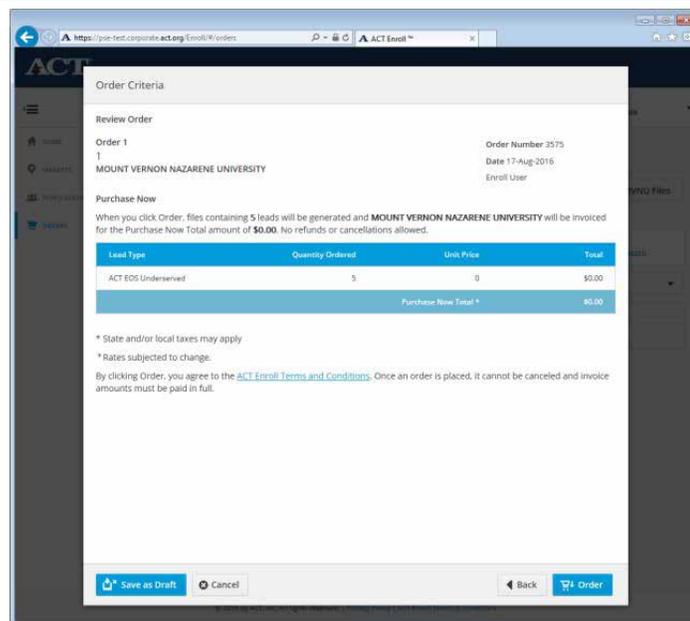
Image



6 The **Review Order** page displays. Here, you can view:

- Your order name
- Your organization name
- Your order number
- Your order date
- Lead type
- Quantity Ordered
- Unit Price
- Total

Carefully read the instructions and information on the screen. Once you are satisfied with your order, select **Order** to submit your order.



Exporting Files from an Order

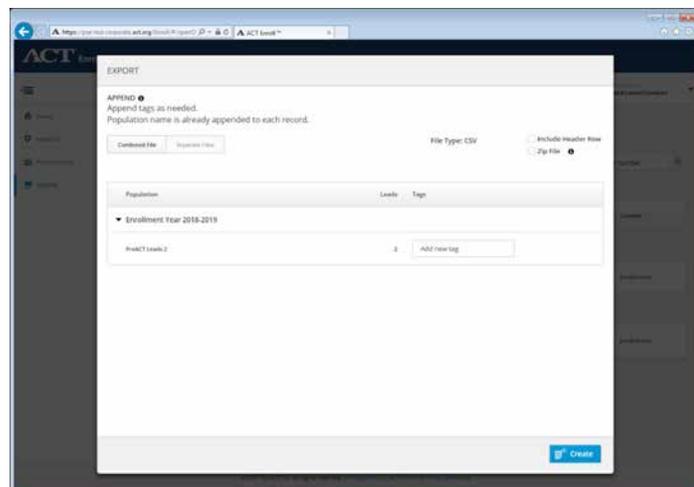
After selecting **Order**, the **Export** page displays. Here, you can:

- Choose to export a combined file or separate files
- Choose whether to include a header row in the file(s)
- Choose whether to zip the file(s)
- Append tags as needed

In the following steps, you'll create the export files containing data for the **Purchase Now** quantities that you just ordered.

Step	Action	Image
------	--------	-------

- | | | |
|---|--|--|
| 1 | Decide whether you want a single combined file that contains all of your data or one file per population. With either choice, the population name will automatically be appended to the record of each lead in every population. Thus, if you choose to create a single file, you will still be able to sort your data by population name. | |
|---|--|--|

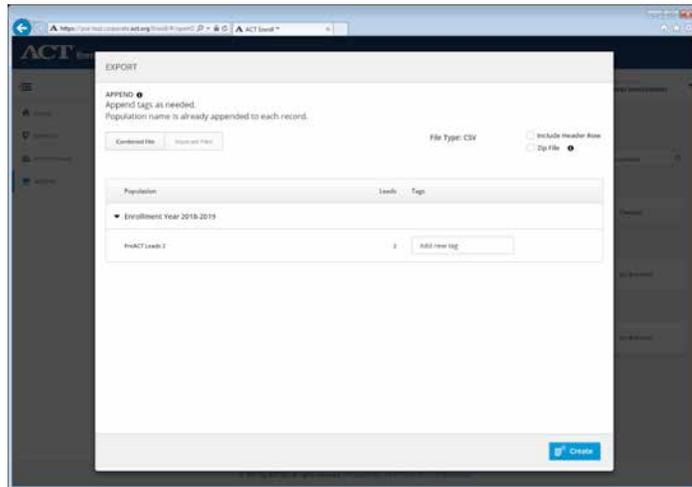


Step Action

- 2 Select whether you would like your file(s) to include a header row.

Select whether you would like your file(s) in a zip file. If your data export file(s) contain 50,000 records or more, we highly recommend you zip the file(s).

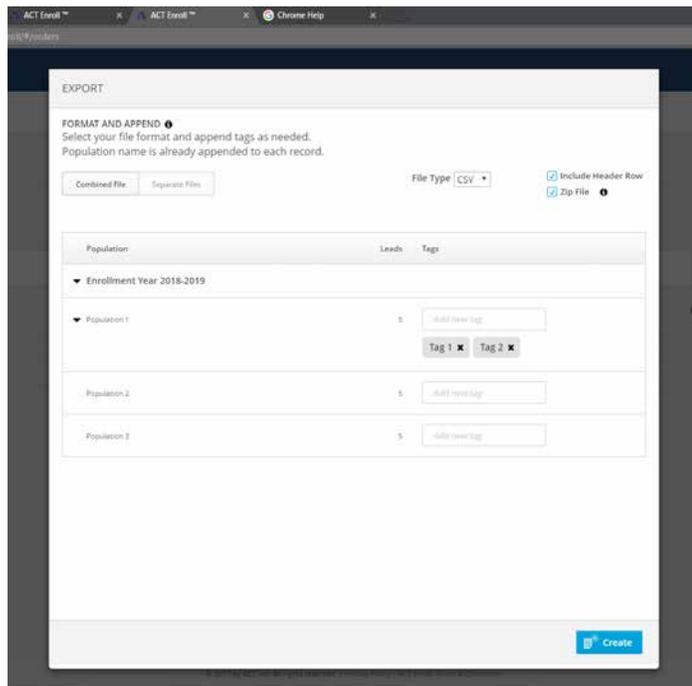
Image



- 3 Append up to 3 tags to each record in a population. Tags are additional data fields that allow you to add information that you may need for downstream processes. Each tag may be up to 50 characters long.

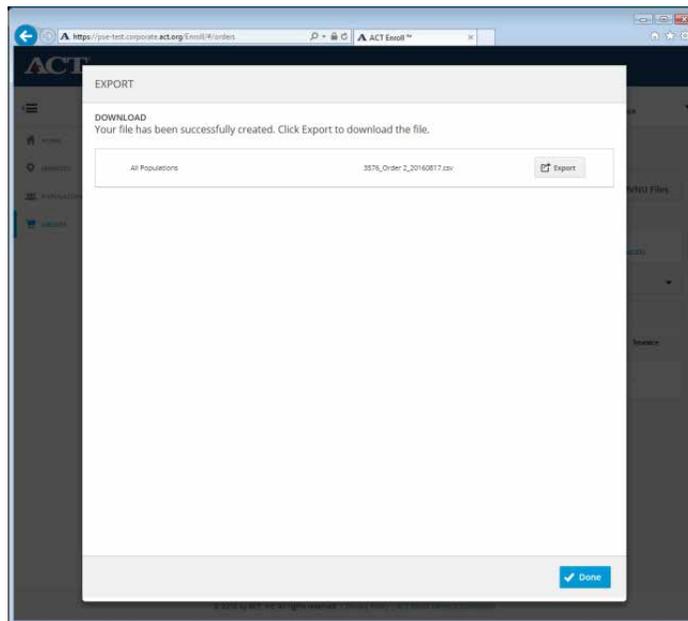
Tags can contain any combination of letters and numbers. Special characters may be used but may not render as expected in the export file. After you input a tag name, you must select **Enter** to add the tag.

Once you are satisfied with your selections, select **Create**.

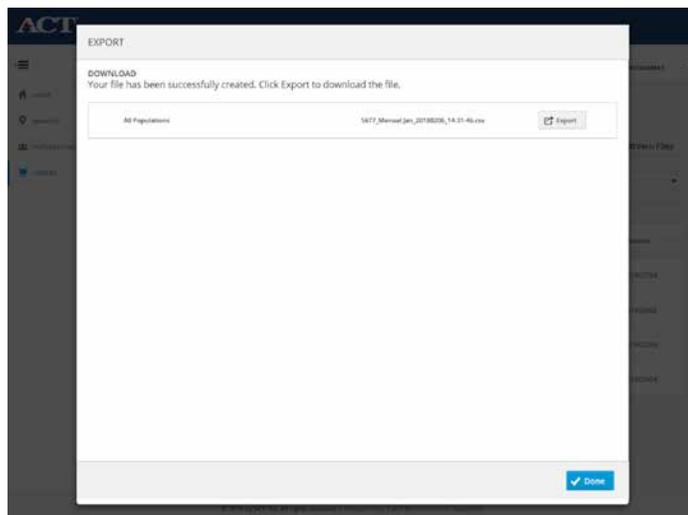


Step Action

- 4 You can now view and export your file(s). When you are finished, select **Done**.

Image

- 5 If the file export is successful, you'll see a "success" message and your new order (along with previous orders) will be visible on the **Orders** page. To retrieve your previously created files, select (organization name) **Files**. Files created during the order process will be available for export for 90 days.



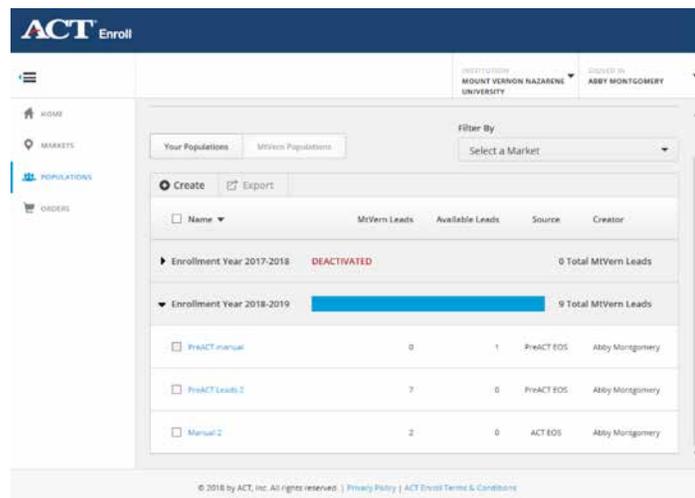
Exporting Populations

To export leads that your organization has previously purchased, you can export by population. To export a population, take the following steps:

Step Action

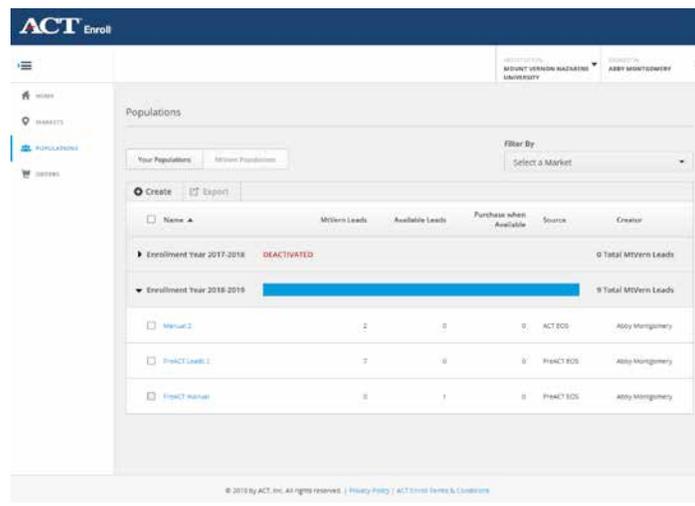
- 1 Select the **Populations** tab on the left side of the screen. The Populations page will appear.

Image



- 2 Select the population(s) you would like to export using the checkboxes next to the population name. Select **Export**.

Note: You will not be able to select a population to export if it contains zero leads.

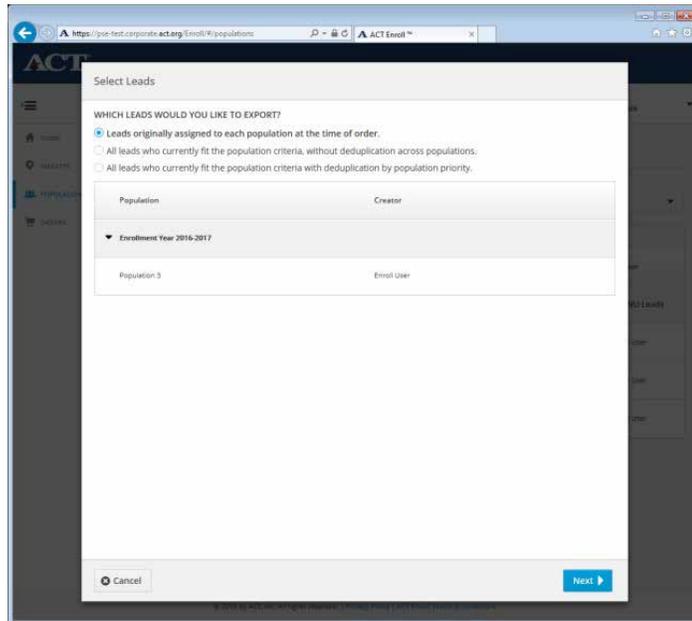


Step Action

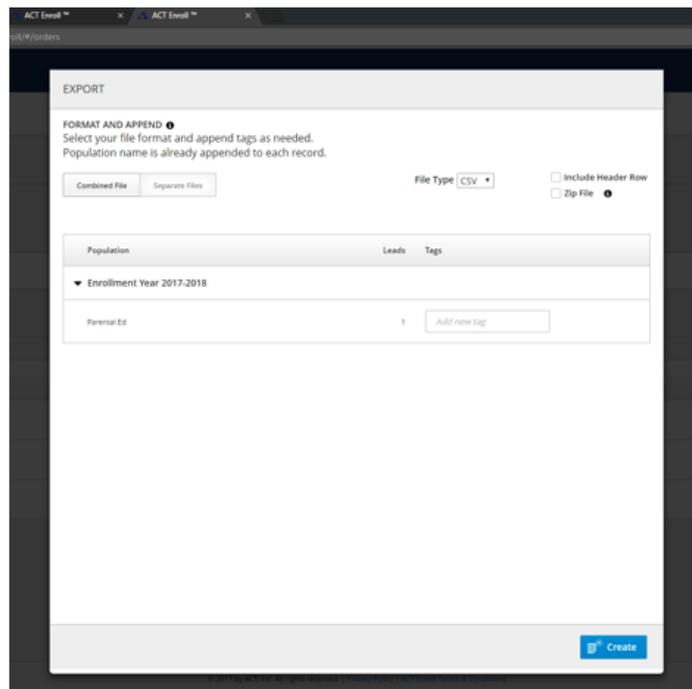
- 3 The **Select Leads** page appears. Here, you can select which leads you would like to export. The two options are:
- Leads from my most recent purchase using this population.
 - Leads from any purchase using this population.

Once you have made your selections and are satisfied, select **Next**.

Image



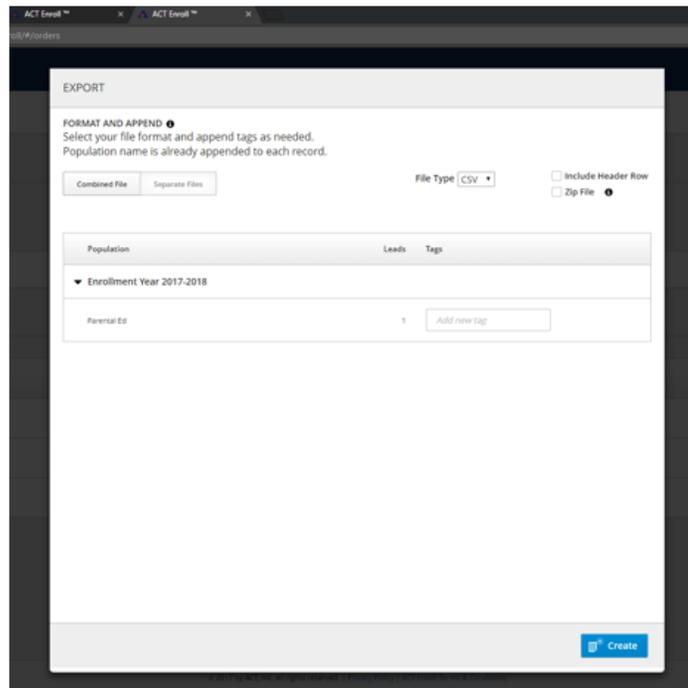
- 4 The **Export – Format and Append** page displays. Here, you can:
- Choose to export a combined file or separate files
 - Select a file type (.csv, .xlsx)
 - Choose whether to include a header row in the file(s)
 - Choose whether to zip the file(s)
 - Append tags as needed



Step Action

- 5 Decide whether you want a single combined file that contains all of your data or one file per population. With either choice, the population name will automatically be appended to the record of each lead in every population. Thus, if you choose to create a single file, you will still be able to sort your data by population name.

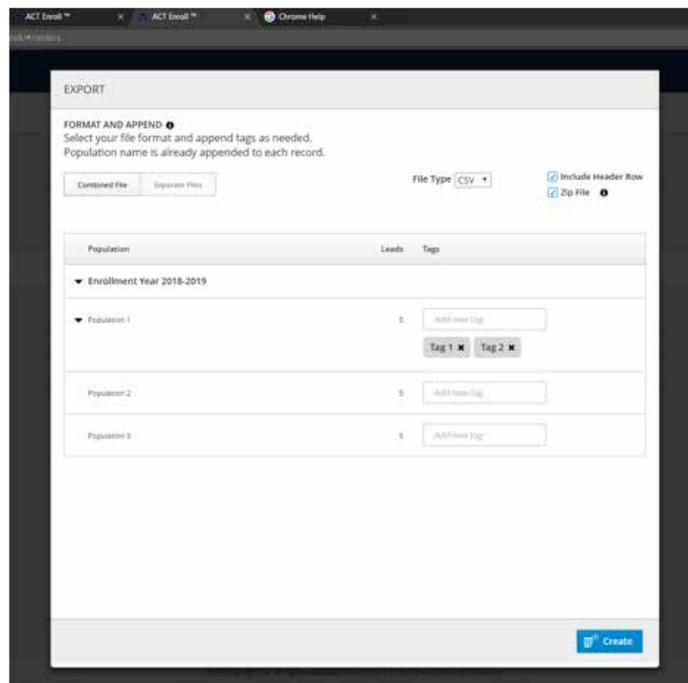
Image



- 6 Append up to 3 tags to each record in a population. Tags are additional data fields that allow you to add information that you may need for downstream processes. Each tag may be up to 50 characters long.

Tags can contain any combination of letters and numbers. Special characters may be used but may not render as expected in the export file. After you input a tag name, you must select **Enter** to add the tag.

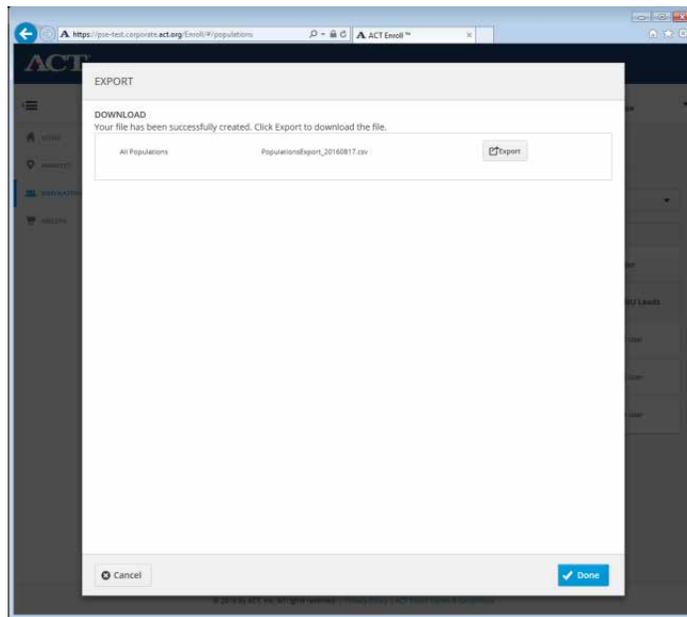
Once you are satisfied with your selections, select **Create**.



Step Action

- 7 You can now view and export your file. When you are finished, select **Done**.

Image



ACT[®]