

## Extraction within Evolution

Search for your projects list using the standard search or search within your profiles.

**Search Options**

**Profile:** Chester Local - CH1 Edit / Create New

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**Quick Find:** My Leads

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**Address:** Enter Site Address Enter PostCode

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**Search:**   **Search Notes**

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Search Projects updated in the last 7 days

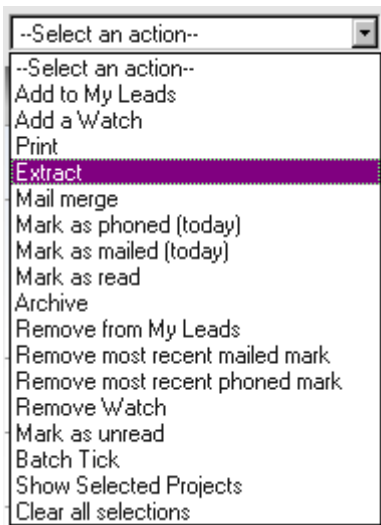
Projects list will appear as below.

				CRM Project		Type	Value	Units	Location	Stage	Updated	
<input type="checkbox"/>				<u>HOUSING - SOUTH ACTON ESTATE REGENERATION</u>		New Build	£ 560M	-	Acton, W3	Confirmed	12-Feb-10	
<input type="checkbox"/>				<u>SOUTH ACTON ESTATE REGENERATION</u>		New Build / Extn / Altn/Conv / Refurb/Repair / Brownfield	£ 560M	2000	Acton, W3	Confirmed	12-Feb-10	
<input type="checkbox"/>				<u>DAVIDSTOW COMMUNITY WIND FARM - CORNWALL</u>		New Build	£ 50M	-	Camelford, PL32	Detail Approval	12-Feb-10	
<input type="checkbox"/>				<u>HOUSING RENEWAL</u>		Refurb/Repair	£ 25M	-	Gateshead, NE10	Tender	12-Feb-10	
<input type="checkbox"/>				<u>DAIRY UNIT</u>		New Build	£ 15M	5	Lincoln, LN1	Detail Planning	12-Feb-10	
<input type="checkbox"/>				<u>BOWES STREET</u>		Extn / Altn/Conv / Refurb/Repair /	£ 11.9M	64	Manchester, M14	Contract	12-Feb-10	

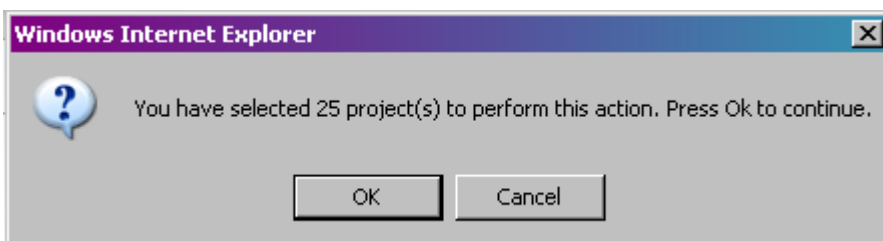
Tick the projects you wish to extract using the tick-boxes down the left hand side of the screen. Ticking the top tick box will select all the projects shown on the one page. In order to select the whole project list, please use the BATCH TICK option from within the SELECT AN ACTION menu.



Once selected, drop down the SELECT AN ACTION menu once more and select EXTRACT.



Now click on  and confirm the number of projects you have select on the next window that appears.



On the next screen, confirm the file type you wish to extract to. CSV is the default and will extract into an Excel Spreadsheet.

- Your organisation's standard extraction format is pre-selected. You can select an alternative format.
- An alternative selection will only be used for this particular extraction.
- Please select the format you require:

**Format:** CSV with my notes

**Profile Name:**

Mark these projects as mailed today

Mark these projects as phoned today

Exclude project(s) mailed in: 7 Days

Exclude project(s) telephoned in: 7 Days

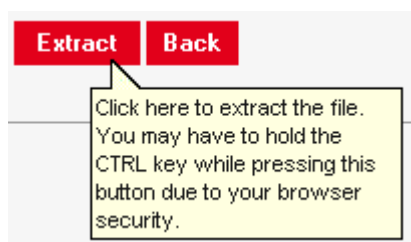
Exclude On Hold / Withdrawn projects

**Extract** **Back**

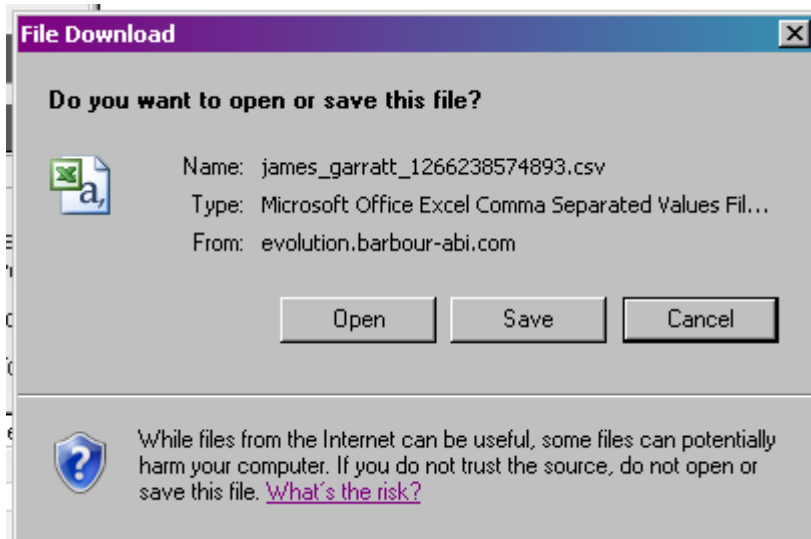
You will also have the option here to mark projects as mailed or phoned automatically if you are using this as a contact list. This means that when performing the next extraction you can exclude the projects you have already mailed or phoned to avoid duplication.

You also have the option to Exclude On Hold or Withdrawn projects.

When hovering over the extract button you will see the following message :



Please follow the instructions and keep your CTRL key held down whilst clicking the extract key. Keep this held down until you have opened or saved the file as follows :



You may open this file directly or save to a memorable location and open at a later stage. Your extraction is now complete.