

EZ FUNDINGS | EZ GROWTH OS

ALTERNATE DATABASE DOWNLOAD SOP

How Loan Officers Download, Preserve and Submit Contacts From Phones, Email and Social Media

IDENTIFY > HARVEST > CONVERT > ENRICH > ACTIVATE



LO FIELD GUIDE | VERSION 1.1 | AUGUST 2026

The LO role is intentionally simple

Find it. Download it. Label it. Submit it. EZ Growth OS handles the technical work after that.

CORE IDEA

Your real database is bigger than GHL. Relationships may be sitting in your phone, email contacts, LinkedIn connections and social audiences.

Two kinds of downloads

TYPE A - CRM-READY CONTACT EXPORTS

Phone and email contact lists often contain real names, phones, emails, companies, addresses and notes. These are normally the first databases to harvest.

TYPE B - SOCIAL RELATIONSHIP ARCHIVES

Social platforms usually provide relationship/account archives. They often do NOT provide private email and mobile data for every follower, friend or subscriber.

Recommended harvest order

- 1 Phone contacts
- 2 Gmail / Outlook / Yahoo contacts
- 3 LinkedIn
- 4 Facebook + Instagram + Messenger
- 5 TikTok + Pinterest + YouTube + X

COMPLIANCE RULE

A contact record, social connection, follower or enriched data point is not automatically permission for automated email or SMS. Organize the relationship first; activate only according to EZ Fundings compliance rules.

Preserve the source before doing anything else

The cleaner the handoff, the faster EZ Growth OS can process the database.

File naming

NAMING STANDARD

LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD | Example: SMITH_JOHN_LINKEDIN_2026-08-26.zip

LO handoff rules

Use official export tools only

Do not install scraping extensions or third-party tools that harvest platform data outside the platform's official export process.

Keep the original file untouched

Do not delete columns, reorder data, convert JSON files, or merge exports before the EZ Growth OS team receives them.

Label the source

The source affects how the record can be categorized, enriched and activated.

Submit securely

Use the EZ Fundings-approved secure upload location. Do not post contact files in public Slack channels or unsecured shared links.

Keep a temporary backup

Retain the original export until EZ Growth OS confirms receipt and successful processing.

Do not self-activate the list

Do not independently put exported or enriched records into automated marketing workflows unless the appropriate marketing consent and compliance treatment are known.

IF THE SCREEN LOOKS DIFFERENT

Platform menus change. Search Settings for terms such as Export, Download your data, Your information, Contacts or Data privacy. If you still cannot find it, stop and ask EZ Growth OS rather than using a scraper.

iPhone / iCloud Contacts

Priority 1 | CRM-READY | Expected export: VCF (.vcf)



CLICK PATH	iCloud.com/contacts > Actions > Select All Contacts > Share > Export vCard
WHAT YOU GET	Names, phones, emails, addresses and notes that are actually stored in iCloud Contacts.

Step-by-step

1. On a tablet or computer, sign in to iCloud with the Apple Account used on the iPhone.
2. Open Contacts.
3. Choose Actions, then Select All Contacts.
4. Choose Share, then Export vCard.
5. Save the .vcf file, rename it using the EZ naming standard, and submit the original file.

EZ GROWTH OS NOTE

If the iPhone shows far more contacts than iCloud.com, some contacts may live in Google, Outlook, Yahoo or another account. Export those sources separately.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [Apple Support - Import, export, or print contacts on iCloud.com](#)

Android Contacts

Priority 1 | CRM-READY | Expected export: VCF (.vcf)



CLICK PATH	Contacts app > Menu/Settings > Export > choose account(s) > Export to .VCF file
WHAT YOU GET	Device and/or account contacts selected for export.

Step-by-step

1. Open the Contacts app on the Android phone or tablet.
2. Open Menu or Settings and choose Export.
3. Choose the account or accounts whose contacts should be exported.
4. Choose Export to .VCF file.
5. Save the file, rename it using the EZ naming standard, and submit it.

EZ GROWTH OS NOTE

Android menus vary by manufacturer and version. If contacts already sync to Google, the Google Contacts CSV export is usually the easier processing path.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [Google Contacts Help - Export, back up, or restore contacts](#)

Gmail / Google Contacts

Priority 1 | CRM-READY | Expected export: CSV (.csv)



CLICK PATH	Google Contacts > select contacts > More actions > Export > Google CSV
WHAT YOU GET	Contacts saved in Google Contacts. This is not a list of everyone you have ever emailed.

Step-by-step

1. On a computer, open Google Contacts using the Google Account you want to harvest.
2. Select one contact, then use Selection actions > All to select the full personal contact list.
3. Choose More actions > Export.
4. Choose Google CSV and click Export.
5. Rename the CSV and submit it without changing the columns.

EZ GROWTH OS NOTE

Google Workspace Directory entries may not all be selectable/exportable as personal contacts.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [Google Contacts Help - Export contacts](#)

Outlook / Microsoft 365

Priority 1 | CRM-READY | Expected export: CSV (.csv)



CLICK PATH	New/Web: People > Manage contacts/Export contacts Classic: File > Open & Export > Import/Export > Export to a file > CSV > Contacts
WHAT YOU GET	Outlook contact records from the selected folder/account.

Step-by-step

1. Open Outlook and go to People.
2. In new Outlook or Outlook on the web, choose Export contacts (or Manage contacts > Export contacts).
3. Choose All contacts or the correct contact folder and export.
4. If using classic Outlook, use File > Open & Export > Import/Export > Export to a file > Comma Separated Values > Contacts.
5. Rename the resulting CSV and submit it.

EZ GROWTH OS NOTE

Do not save changes over the original CSV before submitting it. Keep the untouched export.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [Microsoft Support - Export contacts from Outlook](#)

Yahoo Mail Contacts

Priority 2 | CRM-READY | Expected export: CSV (.csv)



CLICK PATH	Yahoo Mail > Contacts > More options > Export to CSV file
WHAT YOU GET	Contacts stored in Yahoo Contacts.

Step-by-step

1. Use the desktop web version of Yahoo Mail and open Contacts.
2. Choose the More options menu.
3. Choose Export to CSV file.
4. Download the file.
5. Rename the CSV and submit it.

EZ GROWTH OS NOTE

Yahoo notes that special characters in contact records can interfere with some imports/exports. If an export fails, contact EZ Growth OS before editing the list yourself.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [Yahoo Help - Import, export or print contacts](#)

DOWNLOAD SOP

LinkedIn

Priority 1 | HIGH-VALUE NETWORK | Expected export: ZIP + CSV files



CLICK PATH	Me > Settings & Privacy > Data Privacy > Get a copy of your data > Download larger data archive > Request archive
WHAT YOU GET	First-degree connection information can include name, profile URL, company, position and connection date. Email is included only when that connection permits it.

Step-by-step

1. Use LinkedIn on a computer and click Me.
2. Choose Settings & Privacy > Data Privacy.
3. Under How LinkedIn uses your data, choose Get a copy of your data.
4. Choose Download larger data archive and request the archive.
5. When LinkedIn emails you, download the ZIP and submit the original archive.

EZ GROWTH OS NOTE

Do not use LinkedIn scraping extensions. LinkedIn limits the official export to data it is permitted to provide.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [LinkedIn Help - Export connections](#)

Facebook

Priority 2 | SOCIAL AUDIENCE | Expected export: ZIP / JSON



CLICK PATH	Settings & privacy > Settings > Accounts Center > Your information and permissions > Export your information > Create export
WHAT YOU GET	Relationship and account-activity data - not a CRM-ready file of every friend's private email and mobile number.

Step-by-step

1. Open Facebook settings and enter Accounts Center.
2. Choose Your information and permissions > Export your information.
3. Choose Create export and select the Facebook profile.
4. Choose Export to device. Customize the export to include relationship/activity categories useful to EZ Growth OS, such as friends/followers/connections and messages when appropriate.
5. Choose All time and JSON when available, start the export, then download and submit the ZIP when ready.

EZ GROWTH OS NOTE

Official export only. Meta actively restricts unauthorized scraping. Social relationships should not be dumped directly into automated email/SMS campaigns.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [Meta/Facebook Help - Export your information](#)

Instagram

Priority 2 | SOCIAL AUDIENCE | Expected export: ZIP / JSON



CLICK PATH	Profile > Menu > Accounts Center > Your information and permissions > Export your information > Create export
WHAT YOU GET	Follower/following and activity information available in the account export. Usually not private emails or mobile numbers for followers.

Step-by-step

1. Open Instagram, go to Profile and open the menu.
2. Open Accounts Center.
3. Choose Your information and permissions > Export your information.
4. Create an export for the Instagram account and choose Export to device.
5. Choose relevant relationship/activity categories, All time and JSON when available. Download the ZIP and submit it.

EZ GROWTH OS NOTE

The preferred conversion path is follower/viewer > useful content > lead magnet > GHL form > opted-in contact.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [Meta Accounts Center - Export your information](#)

Messenger

Priority 2 | SOCIAL RELATIONSHIP ARCHIVE | Expected export: ZIP / JSON



CLICK PATH	Facebook or Messenger > Settings > Accounts Center > Your information and permissions > Export your information > Create export
WHAT YOU GET	Messenger conversation and account data available in the Meta export. This is not a private directory of participants' email addresses or mobile numbers.

Step-by-step

1. Open Facebook or Messenger and open Settings / Accounts Center.
2. Choose Your information and permissions.
3. Choose Export your information > Create export.
4. Select the Facebook profile used for Messenger and choose Export to device.
5. Choose specific information and include Messages (and related connection/contact categories when available). Choose All time and JSON when available, create the export, then download and submit the ZIP.

EZ GROWTH OS NOTE

Messenger participants with no usable email and no usable phone belong on the separate Pluras Social Skip-Trace Template. Capture every available identity clue; do not scrape participants or self-enroll them in marketing.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [Meta Accounts Center - Export your information \(Messenger / Messages\)](#)

TikTok

Priority 3 | SOCIAL AUDIENCE | Expected export: Data archive / JSON



CLICK PATH	Profile > Menu > Settings and privacy > Account > Download your data
WHAT YOU GET	Account/activity information such as username, watch history, comment history and privacy settings; availability varies by account and privacy rules.

Step-by-step

1. In TikTok, tap Profile, then Menu.
2. Choose Settings and privacy > Account > Download your data.
3. Choose the information to include and select JSON when offered.
4. Tap Request data and wait for TikTok to prepare the file.
5. Return to Download your data > Download data and download the file when ready. TikTok says the file is available for up to four days.

EZ GROWTH OS NOTE

Treat TikTok as an audience source, not as a direct email/mobile database.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [TikTok Support - Requesting your data](#)

Pinterest

Priority 3 | SOCIAL AUDIENCE | Expected export: Data archive



CLICK PATH	Settings > Privacy and data > Request your data > Start request
WHAT YOU GET	A copy of Pinterest account data available to the account owner.

Step-by-step

1. Log in to Pinterest.
2. Open Settings > Privacy and data.
3. Under Request your data, choose Start request.
4. Watch the email address associated with the account for the download link.
5. Download the archive and submit it. Pinterest says the link can take up to 48 hours.

EZ GROWTH OS NOTE

Do not expect a CRM-ready list of private follower contact information.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [Pinterest Help - Download your Pinterest data](#)

YouTube / Google Takeout

Priority 3 | SOCIAL AUDIENCE | Expected export: ZIP archive



CLICK PATH	Google Takeout > Deselect all > YouTube and YouTube Music > Next step > one-time export > ZIP > Create export
WHAT YOU GET	YouTube-related account data available through Google Takeout. It is not a private-email list of channel subscribers.

Step-by-step

1. Sign in to the Google Account that owns the YouTube channel.
2. Open Google Takeout and choose Deselect all.
3. Select YouTube and YouTube Music and choose the applicable data categories.
4. Choose Next step, one-time export and ZIP.
5. Create the export, download the archive when notified, rename it and submit it.

EZ GROWTH OS NOTE

If the channel is a Brand Account, make sure you are using the Google Account/Brand Account that actually owns the channel.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [Google Account Help - Download your Google data](#)

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Priority 3 | SOCIAL AUDIENCE | Expected export: ZIP with HTML/JSON



CLICK PATH	More > Settings and privacy > Your account > Download an archive of your data > confirm password > Request archive
WHAT YOU GET	X says the archive can include profile data, posts, direct messages, media, followers, accounts followed, address-book information, lists and more.

Step-by-step

- 1. Log in to X and open More > Settings and privacy.
- 2. Choose Your account > Download an archive of your data.
- 3. Confirm the password and complete any identity verification requested.
- 4. Choose Request archive.
- 5. When X notifies you that the archive is ready, download the ZIP, rename it and submit it.

EZ GROWTH OS NOTE

The presence of a follower or address-book record is not automatic permission for marketing automation.

Before you submit

Rename the original export: LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD

Do not: change columns, merge files, run a scraper, or independently add the audience to an automated marketing campaign.

Official reference: [X Help - How to access and download your X data](#)

AFTER THE DOWNLOAD

The LO handoff

LOs do not have permission to bulk upload contacts into GHL. Bulk contact imports are an administrator function. Submit the original platform export first, then use the appropriate EZ Fundings template for admin processing.

LO process

1	RENAME	Use LASTNAME_FIRSTNAME_SOURCE_YYYY-MM-DD.
2	RECORD	Note the source and approximate number of contacts/connections if visible.
3	SUBMIT	Upload the untouched file using the approved EZ secure method.
4	RETAIN	Keep a backup until receipt is confirmed.
5	WAIT	Let EZ Growth OS clean, normalize, deduplicate and classify the data.

What EZ Growth OS does next

Preserve > Normalize > Deduplicate > Route > Enrich (when needed) > Admin Import > Segment > Activate

WHY THIS ORDER MATTERS

Enrichment and automation work best after the underlying database has been cleaned and deduplicated. A messy source file should not be pushed directly into campaigns.

DATA ROUTING RULE

One download. Two destinations.

The routing decision is based on whether the record already has a usable direct contact method.

ADMIN-ONLY GHL IMPORT

LOs do not have permission to bulk upload contacts into GHL. The LO prepares and submits the standardized workbook. An authorized EZ Growth OS / GHL administrator validates the file, maps the LO owner and source, reviews tags and consent fields, deduplicates, and performs the bulk import.

DESTINATION A - GHL ADMIN IMPORT TEMPLATE	DESTINATION B - PLURAS SOCIAL SKIP-TRACE TEMPLATE
USE WHEN The record has at least one usable direct contact method - email or phone - and is appropriate to maintain in GHL. Required fields: LO name, source, all available name/contact data, social username/profile URL when applicable, relationship context, tags, and notes.	USE WHEN The social-platform record has no usable email AND no usable phone. This includes friends, followers, connections or Messenger participants identified only by name, username, profile URL or other social clues. Required fields: LO name, source, all available name/contact data, social username/profile URL when applicable, relationship context, tags, and notes.

Social-platform records with no email and no phone

Do not discard these records and do not place them into the GHL direct-import workbook. Add them to the separate EZ Fundings Pluras Social Skip-Trace Template. Capture every identity clue the platform provides - first/last/full name, username or handle, profile URL, platform user ID, city/state, employer/company, job title, relationship type, source export date, tags and notes. The more reliable identity data we provide, the better the matching opportunity.

IMPORTANT: Skip tracing / enrichment does not create marketing consent.

After Pluras returns matched data, the enriched file must return to the EZ admin team for validation, deduplication, relationship/consent classification and any appropriate GHL import. LOs still do not bulk upload the file themselves.

PLURAS ENRICHMENT

Complete the picture after cleaning

Pluras is the enrichment layer - not the first step and not a substitute for consent.

Before Pluras

Collected > Cleaned > Normalized > Deduplicated

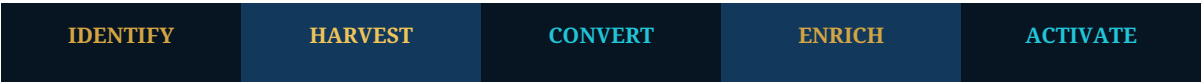
What enrichment may help add or validate

- Phone information
- Email information
- Address information
- Identity matching
- Household information
- Property-related information
- Other available enrichment attributes

CRITICAL GUARDRAIL

Enrichment can improve record completeness. It does not create marketing permission. EZ Fundings source, consent and communication rules still apply.

The complete flow



TROUBLESHOOTING

Common questions LOs will have

Most issues are caused by contacts living in more than one account or by social platforms providing audience data instead of CRM-ready data.

Q: My iPhone says 2,500 contacts but iCloud only exported 700.

A: The missing contacts may be stored under Google, Outlook, Yahoo or another account. Export those sources separately.

Q: My LinkedIn export does not contain every connection's email.

A: That is expected. LinkedIn includes an email for a connection only when the connection has permitted it.

Q: Facebook, Instagram or Messenger did not give me phone numbers and emails.

A: That is expected. That is expected. If a social record has neither a usable email nor a usable phone, place it on the separate EZ Fundings Pluras Social Skip-Trace Template with every available identity clue. If it has at least one usable direct contact method, place it on the GHL Admin Import Template. Do not self-import either file.

Q: Should I open and clean the CSV before sending it?

A: No. Submit the untouched original. EZ Growth OS will create a working copy for cleaning and mapping.

Q: Can I use a Chrome extension to download followers faster?

A: No. Use official platform exports only.

Q: Can Pluras enrich an incomplete record?

A: Potentially, where matching data is available and the use is appropriate. Enrichment is performed after cleaning/deduplication and does not create consent.

Q: Should I import the social archive into GHL myself?

A: No. Social archives often contain records that are not CRM-ready and may require special handling. Submit them to EZ Growth OS first.

LO CHECKLIST

Download. Label. Submit.

Use this checklist for every source.

- ☐ I used the platform's official export feature.
- ☐ I did not use a scraping tool or unauthorized extension.
- ☐ I kept the original export file intact.
- ☐ I renamed the file using the EZ naming standard.
- ☐ I recorded the source.
- ☐ I recorded the approximate contact/connection count when available.
- ☐ I submitted the file through the approved secure method.
- ☐ I kept a backup until receipt was confirmed.
- ☐ I did not independently enroll exported or enriched records in automated marketing.
- ☐ I understand that Pluras enrichment does not create marketing consent.

YOUR ASSIGNMENT

Choose your largest untapped database, export it using this SOP, and submit it to EZ Growth OS. Do not try to harvest every platform at once.

- ☐ I understand that LOs do not have bulk-import permission in GHF; an authorized admin performs the upload.
- ☐ I routed social records with no usable email AND no usable phone to the separate Pluras Social Skip-Trace Template.

My first hidden database: _____

Estimated contacts/connections: _____

First action / date: _____

THE DATABASE YOU NEED MAY ALREADY EXIST.

OFFICIAL REFERENCES

Platform support resources

Paths were verified against official support resources available in August 2026. Interfaces can change.

iPhone: [Apple Support - Import, export, or print contacts on iCloud.com](#)

Android: [Google Contacts Help - Export, back up, or restore contacts](#)

Gmail: [Google Contacts Help - Export contacts](#)

Outlook: [Microsoft Support - Export contacts from Outlook](#)

Yahoo: [Yahoo Help - Import, export or print contacts](#)

LinkedIn: [LinkedIn Help - Export connections](#)

Facebook: [Meta/Facebook Help - Export your information](#)

Instagram: [Meta Accounts Center - Export your information](#)

Messenger: [Meta Accounts Center - Export your information \(Messages / Messenger\)](#)

TikTok: [TikTok Support - Requesting your data](#)

Pinterest: [Pinterest Help - Download your Pinterest data](#)

YouTube: [Google Account Help - Download your Google data](#)

X: [X Help - How to access and download your X data](#)