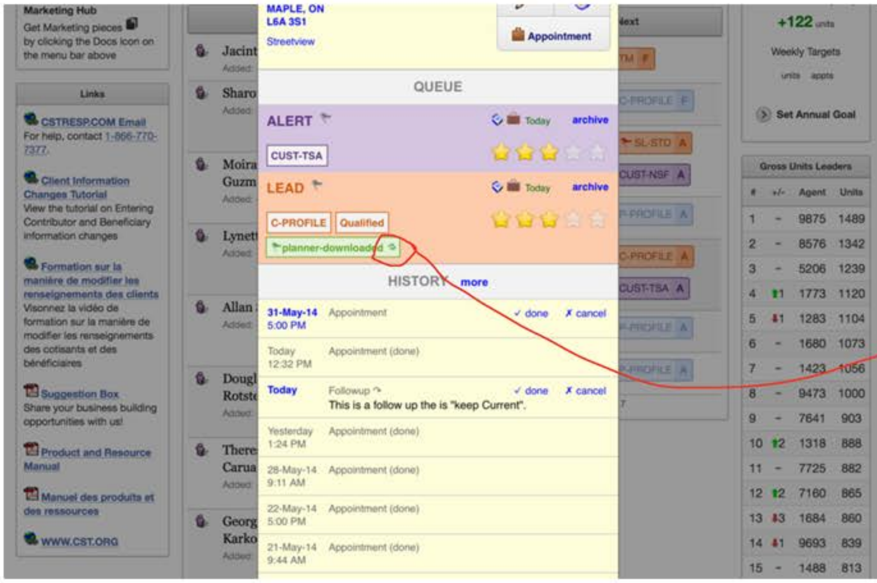
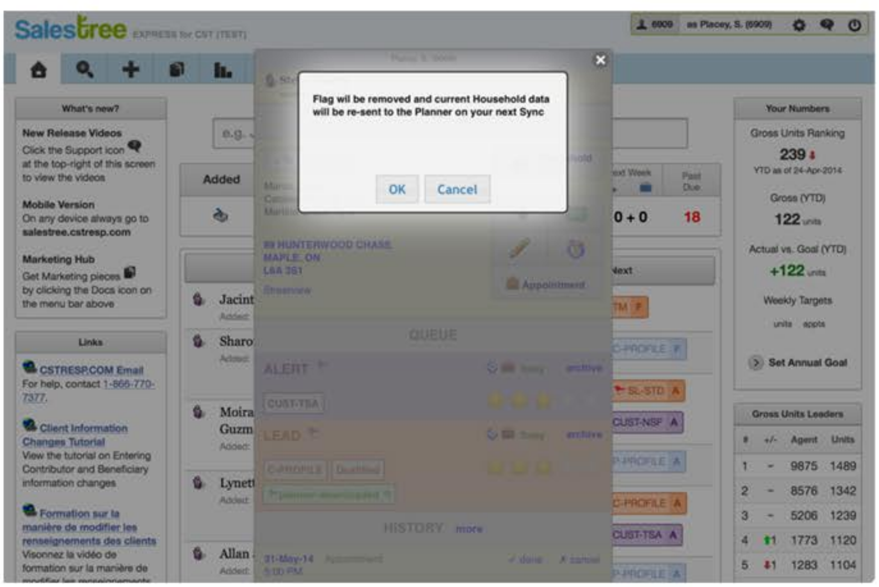
How to re-download client information from SalesTree into the CST Planner



Open the client you want to re-download. Under lead you will see the green box “planner downloaded”. Tap on the 2 little arrows to the right of the box.



Click OK. As long as you still have the appointment booked, if you synchronize the leads in the Planner, it will re-download the client/lead information.