

Winnelson/Austin

Ace Hardware-Boca

Datan

118-961-7957

How to Print Activity Journal

You can print an Activity Journal to view all of the activity within a specific company.

- 1. Left click "Companies" (either in the menu along the top, or in the global menu).
- 2. Left click desired company.

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Chris Farley

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Leeson Motors	We co	overed our produ	ucts., No interest a	at this time.					08-26-201	19

- 5. Left click desired start date for Export (use arrow keys to move forward/back a month).
- 6. Left click desired end date (today's date will be used by default).
- 7. Left click "Export" button.
- 8. Left click arrow on the downloaded file in the bottom left corner of screen.
- 9. Left click "Open."

These images show the selections for "From" date, "To" date and "Export." Excel is the default file type.



e	Export typ	e			×
7	From: File Type: Export	08-01-2019	To:	09-09-2019]

This image shows the download in the bottom left corner of Chrome.





How to Print Activity Journal (continued...)

- 10. Preview your file in Excel. Make sure you have the dates you wanted to see.
- 11. Close the export box (or start at step 6 to enter new dates and do a new export).

This image shows the file opened in Excel to preview.

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18	834	01-09-201	Test Even	ADATA	Sasha Jim	Sales call	General n	1728	Viking	We cover	01-11-201	Admin	
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This image shows where you can re-enter dates for the report, or close the window.

Export type		× 1	
From: 07-01-2019 File Type: Excel CSV	To: 09-09-201	9	



How to Sort & Filter the Report

You can turn on "Filters" to sort and/or filter the results of your report.

- 1. Left click "Enable Editing" at the top of the page.
- 2. Left click the row number for row 4 (to highlight the row with the column headers).
- 3. Left click the "Data" tab.
- 4. Left click the "Filter" button.

	This image shows where the "Enable Editing" button can be found.											
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How to Auto Fit all Column Widths at One Time

In a few simple steps you can make all the columns as wide as they need to be to accommodate the widest data in each of the columns. This will eliminate adjusting each column width separately.

- 1. Left click "Select All" button (or use CTRL + A).
- 2. Hover cursor between any two columns (look for cursor to change to +++)
- 3. DOUBLE left click.

This image shows the "Select all" button (triangle to the left of column A and above row 1)

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How to use Sort & Filter

Now you can use the drop down in any of the columns to sort alphabetically or numerically. If you want to sort, use one of the top two options in the drop down menu. If you want to "filter" out some of the results, remove check marks from items in the bottom section.

Sort alphabetically to group by manufacturer

- 1. Left click drop down arrow in "Manufacturer" column.
- 2. Left click "Sort A to Z."

This image shows where to left click on the drop down arrow to sort by a column.



This image shows the sheet after the sort by "Manufacturer" column.

4	Date -	Title -	Custom -	Attendees -	Call Type -	General I -	Detail Id	Manufacturer	Co	nment
5	04-23-2019	Sales call	ADATA	Bob Doeschert	Sales call		2265	Altran Magnetics	We	reviewed our literature.
6	03-27-2019	Sales call	ADATA	Sasha Jimenez	Sales call	This comment	2137	Altran Magnetics	Tes	for this Mfg
7	01-21-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1772	Altran Magnetics	Wo	Id like to host a lunch and learn in March.01-2
8	01-07-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1706	Altran Magnetics	ls re	ady for a quote on 5000 chain 255
9	04-23-2019	Sales call	ADATA	Bob Doeschert	Sales call		2267	Eifeler Coatings Technology	We	overed our products. We reviewed our litera
10	04-23-2019	Sales call	ADATA	Bob Doeschert	Sales call		2264	Fedco Batteries	The	use healthcare liners. They use our competi
11	01-21-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1774	Fedco Batteries	The	/ use our competitor. They use healthcare line
12	01-21-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1771	General Devices	Find	bigger sample
13	01-14-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1741	General Devices	We	reviewed our literature.
14	01-07-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1705	General Devices	We	overed our products. Most interested in belt
15	01-04-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1667	General Devices	Rea	ly quote 5000 RFS2000
16	01-04-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1669	Omegaflex	We	covered our products.
17	04-23-2019	Sales call	ADATA	Bob Doeschert	Sales call		2268	Stace Energy Products	∵v e	covered our products. We reviewed our litera



How to Print Activity Journal (continued...)

- Filter to only show one manufacturer1. Left click drop down arrow in "Manufacturer" column.2. Remove check mark from "(Select All)."

This image shows where to left click on the drop down arrow to filter out manufacturers.

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ales call		2264	Fedco Batteries	5	They use healthcare liner
ales call		2265	Altran Magneti	cs	We reviewed our literatu
ales call		2266	Vericom		We covered our products
ales call		2267 IX Sear Filter Text 1 Sear 	Eifeler Coating: by Color Eilters ch (Select All) Altran Magnetics Eifeler Coatings Te Fedco Batteries General Devices Omegaflex Staco Energy Prod Staco Energy Prod Staco Energy Prod Vericom	s Technology	We covered our products

How to Print Activity Journal (continued...)

- 3. Place check mark next to desired manufacturer(s).
- 4. Left click "OK."

This image where to select the manufacturer(s) you want to see.
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Sor <u>t</u> by Color	>
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This image shows the sheet after it has been filtered to	show only one manufacturer.
	Activity Journal Penart ADATA (5) view - Eycal

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12	Sasha Jimenez	Sales call		1771	General D	evices	Find bigger	sample
13	Sasha Jimenez	Sales call		1741	General D	evices	We review	ed our literature.
14	Sasha Jimenez	Sales call		1705	General D	evices	We covere	d our products. Most interested
15	Sasha Jimenez	Sales call		1667	General D	evices	Ready quot	te 5000 RFS2000
25								
26								
27								



This concludes the instructions for this tutorial.