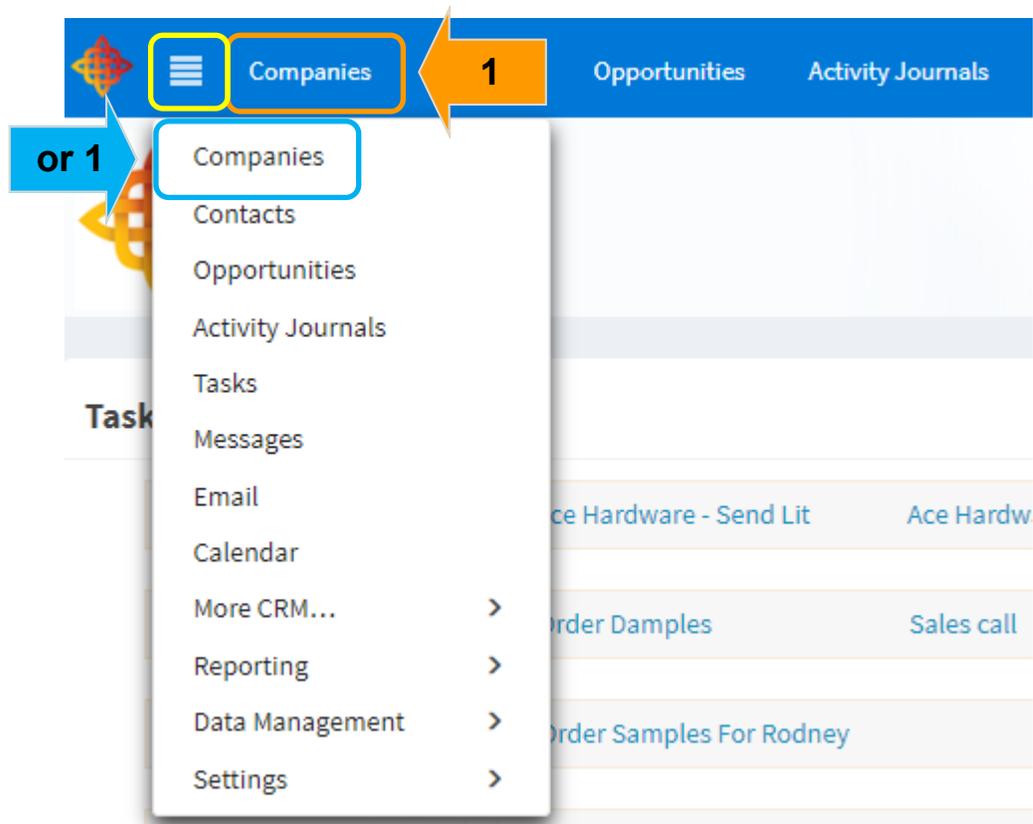


How to Print Activity Journal

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.

This image shows



This image shows

New		Export		Show Active		Search fields		Columns	
		(1 of 4)		1		2 3 4		50	
	Name ↑↓	Phone ↑↓	Type ↓↑	Call Pattern ↑↓	Sales Team ↑↓	City ↑↓	State ↑↓		
<input type="checkbox"/>	Jabil-Corporate	(727) 577-9749	CEM		Chris Farley	St. Petersburg	FL		
<input type="checkbox"/>	Link Construction Group		Contractor		Chris Farley				
<input type="checkbox"/>	City Electric-Tampa		Customer		Chris Farley				
<input type="checkbox"/>	Comp1		Customer		Admin Accounts				
<input type="checkbox"/>	WillowTree	561-312-0054	Customer	rdale	Chris Farley	Boynton Beach	FL		
<input type="checkbox"/>	Winnelson/Austin		Customer	Bradenton/Sarasota	Chris Farley				
<input type="checkbox"/>	Ace Hardware-Boca Raton	118-961-7957	Distributor	FL-Ft. Laud North	Bill Murray	Boca Raton	Florida		



How to Print Activity Journal (continued...)

3. Left click "Activity Journal" tab.
4. Left click "Export" (you can use the "Edit" buttons to make changes before you export).

This image shows the "Activity Journal" tab.

Company Details

Company Summary

WillowTree

6043 Sunberry Circle, Boynton Beach, FL, 33437
561-312-0054

Save Cancel Delete Merge to Change Sales Team

Basic Custom Fields Trip Reports Contacts Opportunities Attachments **Activity Journal**

New Print Export

Sat 17 Aug 2019
Regarding : Willow Tree North
By Chris Farley, Contacts : Kelly Corcoran, Shannon Kauffman

Suretape	They are concerned with compostability. They use our competitor.
Leeson Motors	We covered our products., No interest at this time.

This image shows the sample list of Activities for the sample Company.
You can scroll through the activity and make edits before exporting.

Save Cancel Delete Merge to Change Sales Team Related Products Dashboard

Basic Custom Fields Trip Reports Contacts Opportunities Attachments **Activity Journal**

New Print **Export**

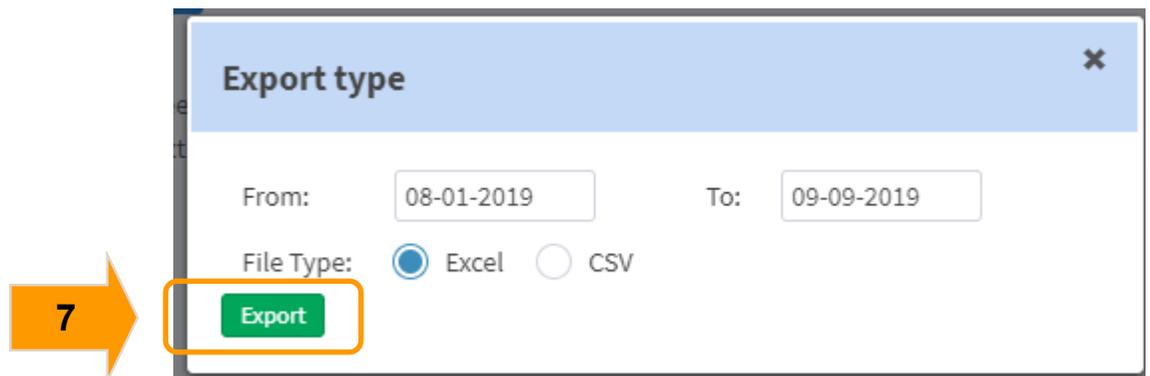
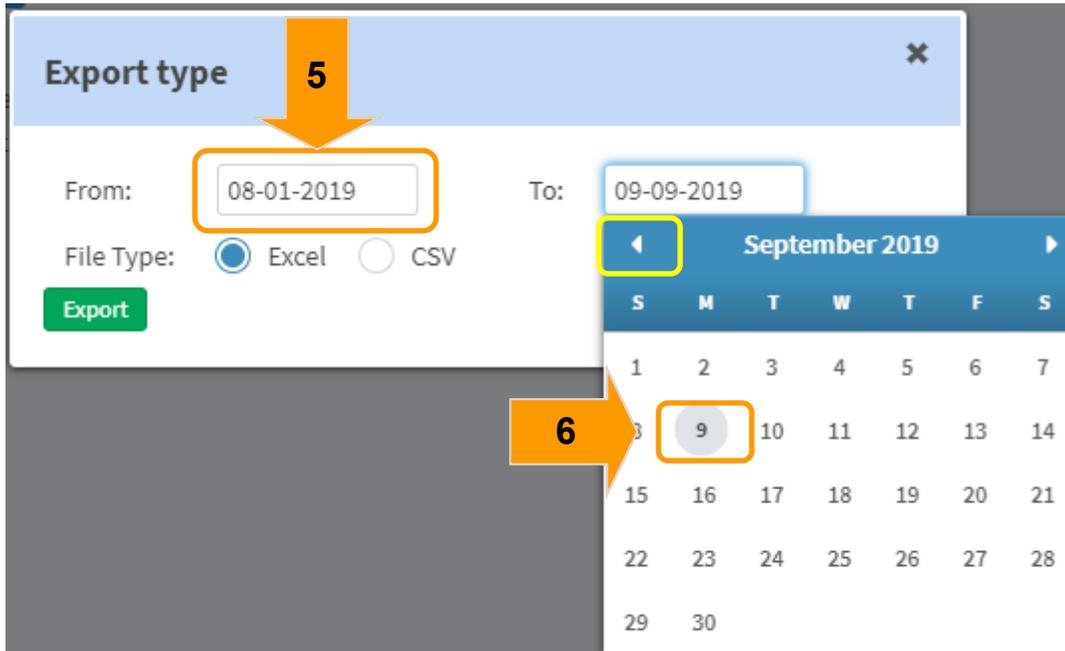
Sat 17 Aug 2019
Regarding : Willow Tree North
By Chris Farley, Contacts : Kelly Corcoran, Shannon Kauffman

Suretape	They are concerned with compostability. They use our competitor.	08-26-2019
Leeson Motors	We covered our products., No interest at this time.	08-26-2019

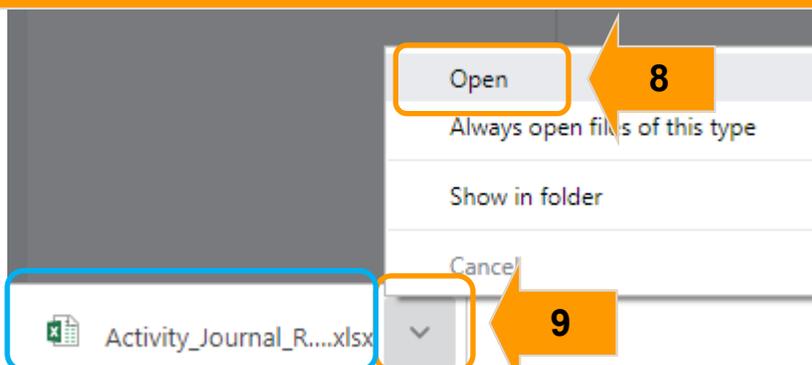
Edit button

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.



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



You can also double left click the download and it will open in Excel.



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.

Header	Date	Title	Custom Attendi	Call Typ	Genera	Detail	Manufa	Comme	Follow	Sales Rep	
1055	04-23-2019	Sales call	ADATA	Bob Does	Sales call	2263	Synapse	We discus		Jack Repdemo	
1055	04-23-2019	Sales call	ADATA	Bob Does	Sales call	2264	Fedco Bat	They use f		Jack Repdemo	
1055	04-23-2019	Sales call	ADATA	Bob Does	Sales call	2265	Altran Ma	We review		Jack Repdemo	
1055	04-23-2019	Sales call	ADATA	Bob Does	Sales call	2266	Vericom	We cover		Jack Repdemo	
1055	04-23-2019	Sales call	ADATA	Bob Does	Sales call	2267	Eifeler Co	We cover		Jack Repdemo	
1055	04-23-2019	Sales call	ADATA	Bob Does	Sales call	2268	Staco Ene	We cover		Jack Repdemo	
1006	03-27-2019	Sales call	ADATA	Sasha Jim	Sales call	This com	2137	Altran Ma	Test for th	Jack Repdemo	
855	01-21-2019	Sales call	ADATA	Sasha Jim	Sales call	1771	General D	Find bigge	01-28-2019	Jack Repdemo	
855	01-21-2019	Sales call	ADATA	Sasha Jim	Sales call	1772	Altran Ma	Would like	01-25-2019	Jack Repdemo	
855	01-21-2019	Sales call	ADATA	Sasha Jim	Sales call	1773	Vericom	We cover		Jack Repdemo	
855	01-21-2019	Sales call	ADATA	Sasha Jim	Sales call	1774	Fedco Bat	They use		Jack Repdemo	
840	01-14-2019	Sales call	ADATA	Sasha Jim	Sales call	1741	General D	We review	01-14-2019	Jack Repdemo	
834	01-09-2019	Test Even	ADATA	Sasha Jim	Sales call	General n	1727	Synapse	We prese	01-11-2019	Admin
834	01-09-2019	Test Even	ADATA	Sasha Jim	Sales call	General n	1728	Viking	We cover	01-11-2019	Admin
821	01-07-2019	Sales call	ADATA	Sasha Jim	Sales call		1705	General D	We cover		Jack Repdemo
821	01-07-2019	Sales call	ADATA	Sasha Jim	Sales call		1706	Altran Ma	Is ready fo	01-07-2019	Jack Repdemo

This image shows where you can re-enter dates for the report, or close the window.

Export type

From: To:

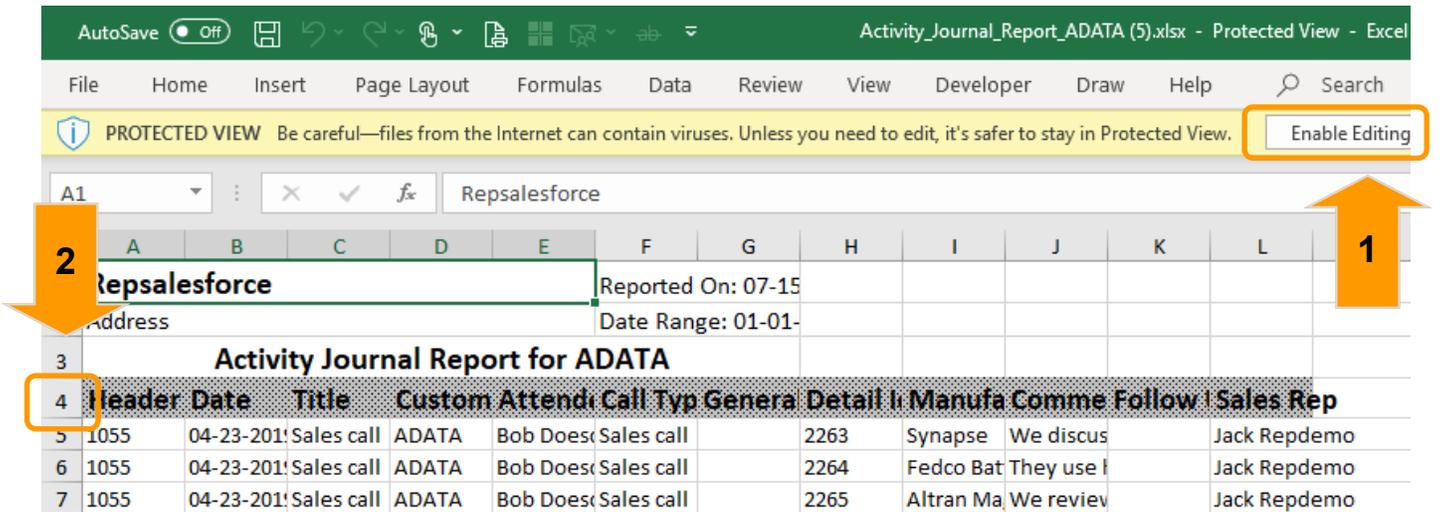
File Type: Excel CSV

How to Sort & Filter the Report

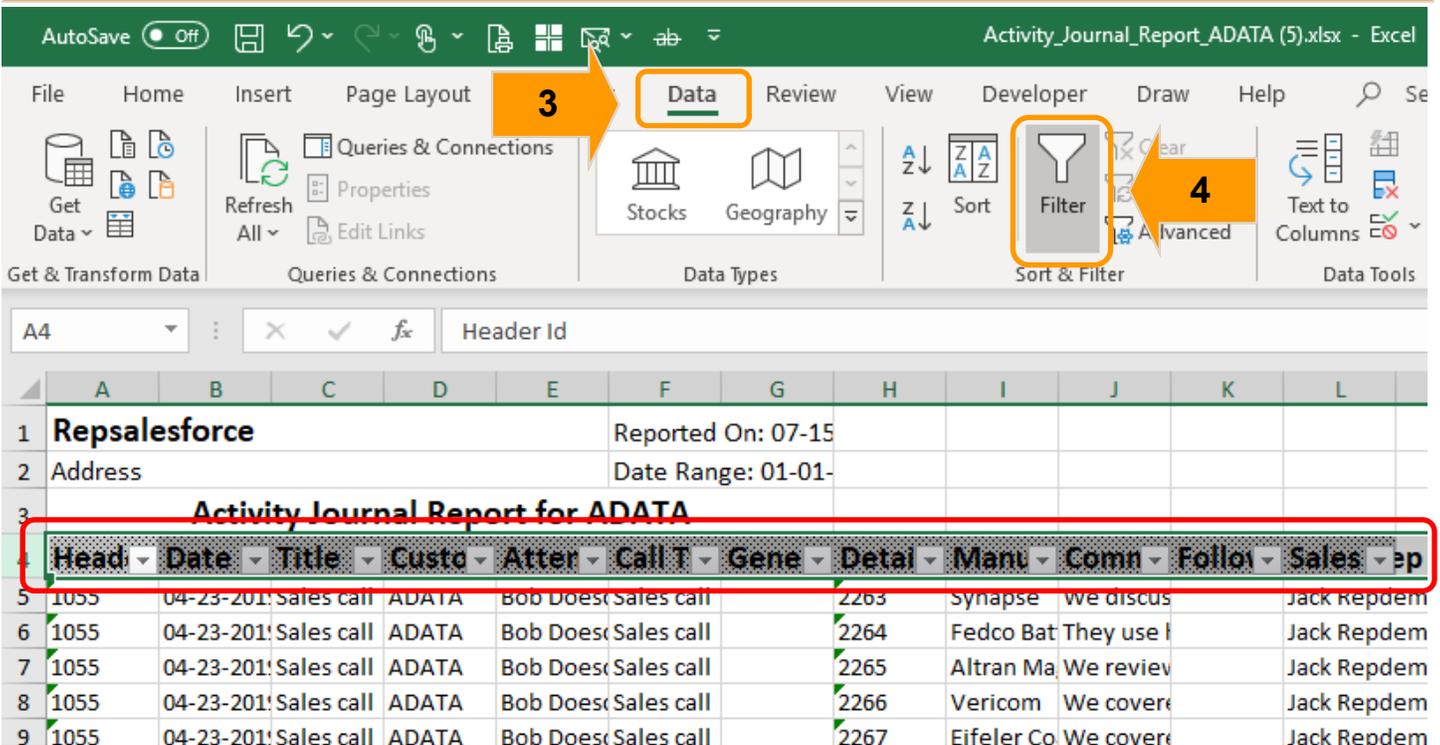
You can turn on “Filters” to sort and/or filter the results of your report.

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.



This image shows where to left click the “Data” tab, and the “Filter” button. Drop down arrows will be added to the header row.



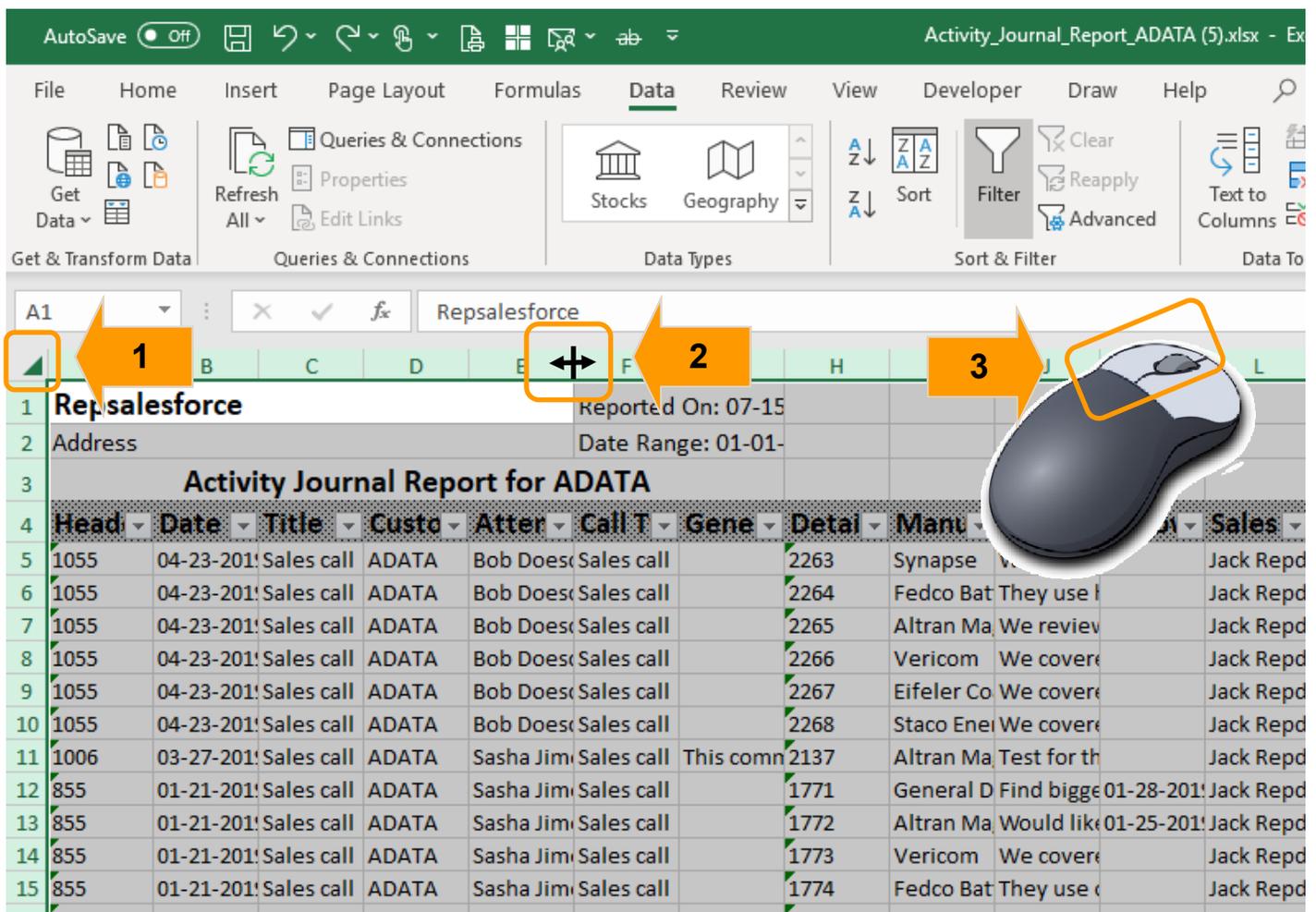


How to Auto Fit all Column Widths at One Time

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)



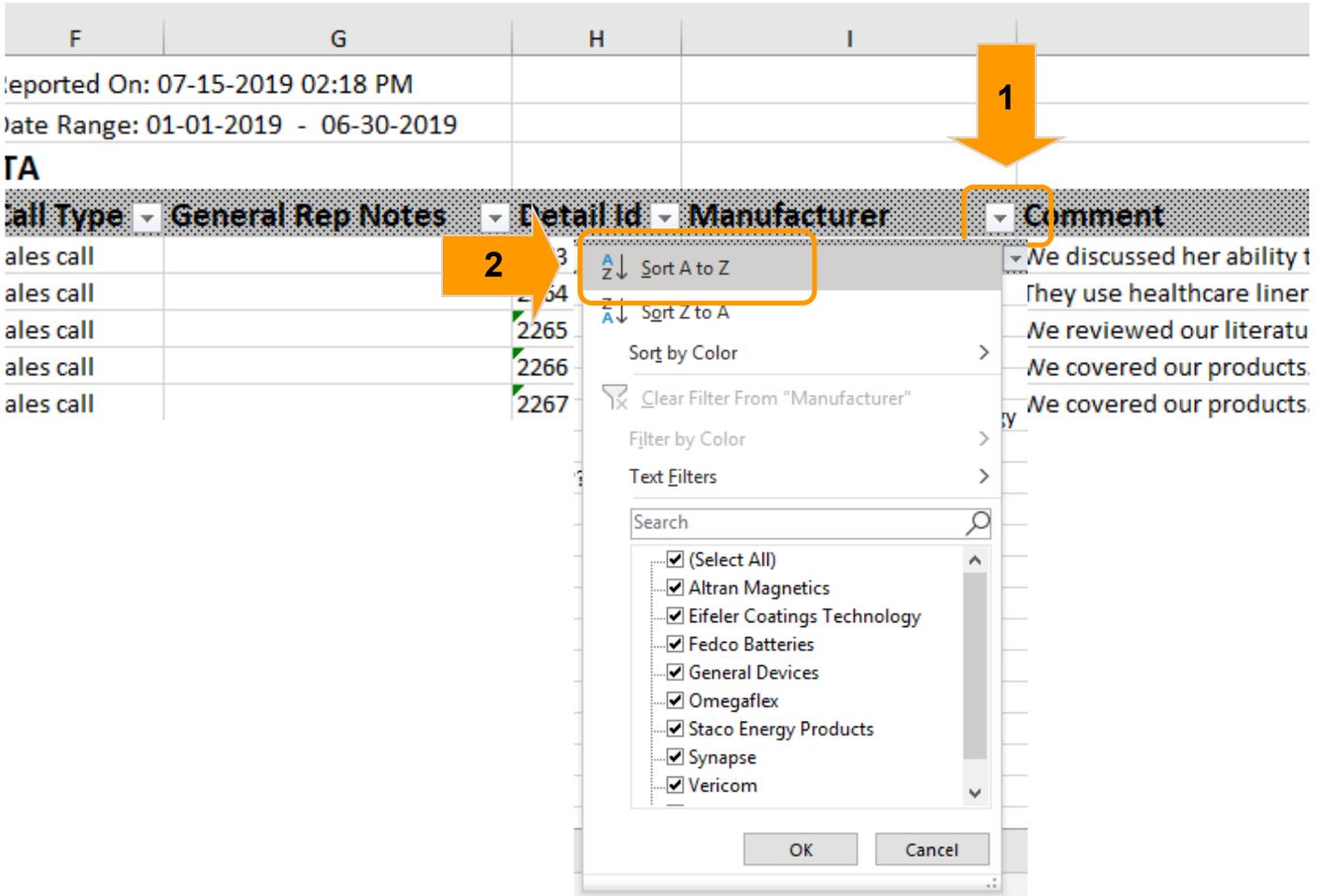
The screenshot shows the Microsoft Excel interface with the 'Data' ribbon selected. The spreadsheet contains data for 'Repsalesforce' and an 'Activity Journal Report for ADATA'. The data is organized into columns with headers: Head, Date, Title, Custo, Atter, Call T, Gene, Deta, Manu, SA, and Sales. The rows contain call records with details like dates, titles, customer names, and sales representatives.

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	Detail Id	Manufacturer	Comment
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	Test for this Mfg
7	01-21-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1772	Altran Magnetics	Would 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	Is ready for a quote on 5000 chain 255
9	04-23-2019	Sales call	ADATA	Bob Doeschert	Sales call		2267	Eifeler Coatings Technology	We covered our products. We reviewed our litera
10	04-23-2019	Sales call	ADATA	Bob Doeschert	Sales call		2264	Fedco Batteries	They use healthcare liners. They use our competi
11	01-21-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1774	Fedco Batteries	They use our competitor. They use healthcare lin
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 covered our products. Most interested in belt
15	01-04-2019	Sales call	ADATA	Sasha Jimenez	Sales call		1667	General Devices	Ready 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	Staco Energy Products	We covered our products. We reviewed our litera



Filter to only show one manufacturer

1. 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.

F	G	H	I	
Reported On: 07-15-2019 02:18 PM				
Date Range: 01-01-2019 - 06-30-2019				
TA				
Call Type	General Rep Notes	Detail Id	Manufacturer	Comment
ales call		2263	Synapse	We discussed her ability t
ales call		2264	Fedco Batteries	They use healthcare liner
ales call		2265	Altran Magnetics	We reviewed our literatu
ales call		2266	Vericom	We covered our products.
ales call		2267	Eifeler Coatings Technology	We covered our products.

1X Clear Filter From Manufacturer

Filter by Color >

Text Filters >

Search

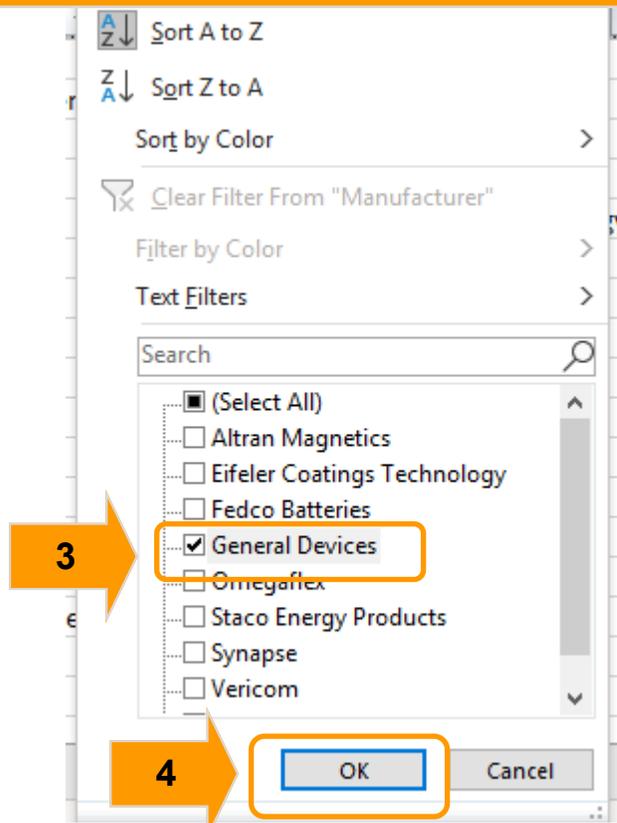
- (Select All)
- Altran Magnetics
- Eifeler Coatings Technology
- Fedco Batteries
- General Devices
- Omegaflex
- Staco Energy Products
- Synapse
- Vericom

OK Cancel

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.



This image shows the sheet after it has been filtered to show only one manufacturer.

Activity_Journal_Report_ADATA (5).xlsx - Excel						
File Home Insert Page Layout Formulas Data Review View Developer Draw Help Search						
Get & Transform Data Queries & Connections Data Types Sort & Filter Data Tools						
J2						
E F G H I						
1		Reported On: 07-15-2019 02				
2		Date Range: 01-01-2019 - 0				
3	rnal Report for ADATA					
4	Attendees	Call Type	General I	Detail Id	Manufacturer	Comment
12	Sasha Jimenez	Sales call		1771	General Devices	Find bigger sample
13	Sasha Jimenez	Sales call		1741	General Devices	We reviewed our literature.
14	Sasha Jimenez	Sales call		1705	General Devices	We covered our products. Most interested
15	Sasha Jimenez	Sales call		1667	General Devices	Ready quote 5000 RFS2000
25						
26						
27						



This concludes the instructions for this tutorial.