

Contacts by customer

Sales Support

Go to CRM Accounts and filter by Sales Support and open accounts and export to excel



Column B "contact frequency" find and replace column tact for number e.g. "twice a year" replace with 2



Insert 2 columns to the right and header them; "year" done and "year" to do and format to number



Go to CRM history and export to second excel sheet



Delete all rows that are not contacts from the current reporting year



Paste into excel sheet 1 tab 2



In excel sheet 1 tab 1 column title "year" done use formula =COUNTIF("year"done!A:A,[@[Account Number]]) and copy



Then excel sheet 1, tab 1 column title "year" to do add formula =MAX(0,[@[Contact Frequency]]-e2) and copy down column



At the bottom of column B add formula =sum(B2:B"end of column row number") and copy across to column D



Filter contact frequency to zero and delete these, any that have had a contact check with Account Manager that they are right



Save excel sheet as "SS contacts by customer "date contacts are run to"



Circulate to relevant people

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