

Contacts by customer

Account Manager

Go to CRM Accounts and filter by account manager and open accounts and export to excel



Column B “contact frequency” find and replace column tact for number “twice a year” replace with 2



Insert 4 columns to the right and header them; “year” F2F, “year” phone, “year” total 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



Filter by Activity Type “Telephone Call—Note” and delete all rows



Reset filter and selecting all, the un tick “Telephone Call”



This will leave all versions of “Meeting”, copy and paste into excel sheet 1 tab 2, rename tab “year F2F”



Do the same with “Telephone call” and copy into excel sheet 1 tab 3 and rename tab “year” phone



In excel sheet 1 tab 1 column title “year” F2F use formula =COUNTIF(F2F!A:A,[@[Account Number]]) and copy down column



Do the same in excel sheet 1, tab 1 column title “year” phone using formula =COUNTIF('Phone '!A:A,[@[Account Number]])



Then excel sheet 1, tab 1 column title “year” total use formula =C2+D2 and copy down column



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 F



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 “RW contacts by customer “date contacts are run to”



Circulate to relevant people

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