

Create a Manager SE Data Export File for Excel (csv)

The resulting file named **followup.csv** will include the following data fields:

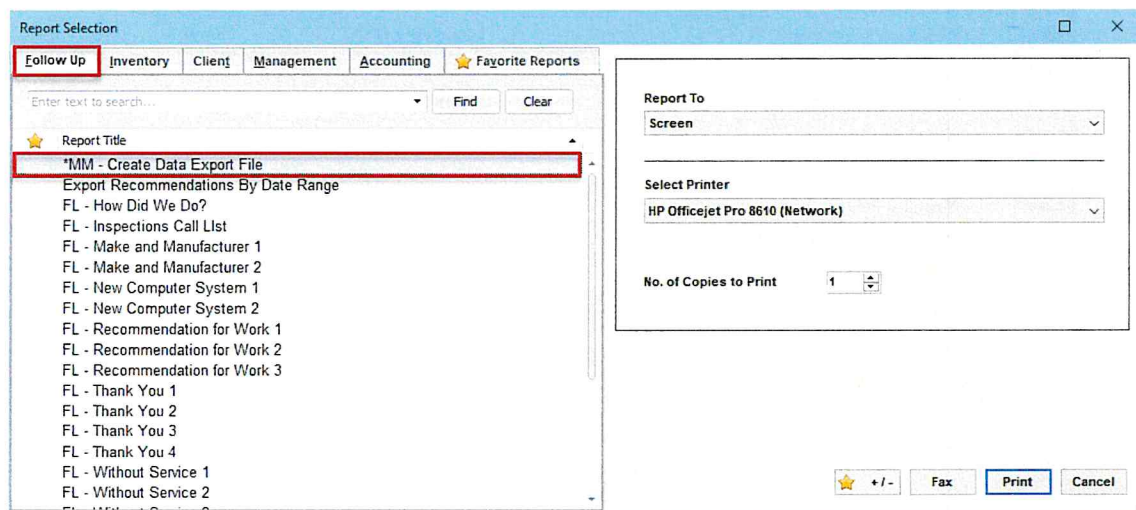
FirstName	LastName	SpouseName	Title	DOB	EmailAddress
Address	City	State	ZipCode	Company	CustId
VehicleId	Year	Make	Model	Engine	License
LastInDate	InspDate	MilesPerDay	BalanceDue	CreditAmt	UnitNo
YTDTotal	CreditHistory	CategoryDescription	MembershipNo		
Remarks	LifetimeTotal	FirstVisited	LastVisited	LifetimeVisits	
PhoneNum1	PhoneDesc1	PhoneNum2	PhoneDesc2	PhoneNum3	PhoneDesc3
PhoneNum4	PhoneDesc4	PhoneNum5	PhoneDesc5	PhoneNum6	PhoneDesc6
PhoneNum7	PhoneDesc7	PhoneNum8	PhoneDesc8	PhoneNum9	PhoneDesc9
PhoneNum10	PhoneDesc10				
OdometerIn	OdometerOut				

NOTE: Tech Support cannot assist with questions on this; it is up to the user to possess skills required

1) Click on **Reports**.



2) Click on **Follow Up** tab and then select the ***MM – Create Data Export File** entry.



3) Enter the desired date range and consider filters; then click on **Search** to build the customer list.

Followup

History Customer New/Inactive Recommend Inspections View List

Selection Criteria

Service Date From 1/ 1/2019 To 8/12/2019 ☒ Select For Cust. ☐ Select For Veh.

Category < All >

Selection Method:
Select by Customer for specified date range.

Selection Filters

Vehicle Make < All > ☒ This Make only ☐ Exclude this Make

Zip Code < All > ☒ This Zip only ☐ Exclude this Zip

Mileage Since Service 0 ☒ Include if greater ☐ Include if less

Records Selected: 0

Search Exit

4) Review the customer list; use Delete option if needed to trim list. Then click on **Print** to save the file.

Followup --- View from History

History Customer New/Inactive Recommend Inspections View List

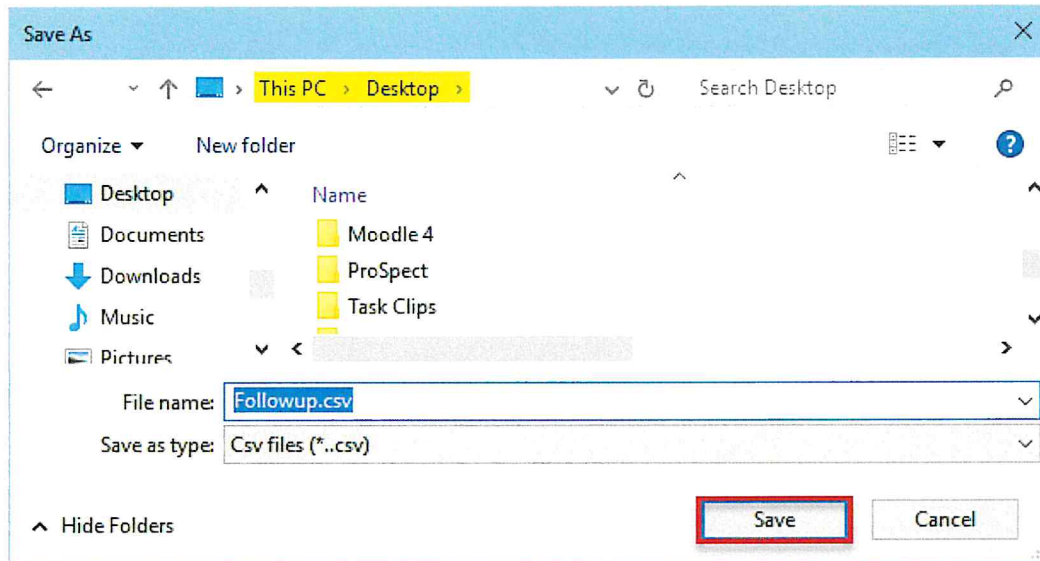
ZipCode	Customer	Vehicle
	Boyd, Stephen	2004 Chevrolet Malibu
90210	McDonnell, Timothy	2004 Acura TL
91082	Van Hoek, Ren	1997 Honda Accord SE
92028	Underwood, Ruth	2007 Volvo XC90
92064	Jones, John	2013 Chevrolet Impala LS
92064	Story, Ralph	2008 Chevrolet Impala LS
92064	Watson, Phil	2013 Volkswagen Routan SEL Pre...
92064	[Aaron's Long Haul] Paul, Aaron	2009 Peterbilt 325
92070	Xavier, Rene	1994 Mitsubishi Montero SR
92126	[Harkins 7/24 Repair] Harkins, John	2002 Toyota Tacoma PreRunner
92127	Hamilton, Reggie	1994 Pontiac Trans Sport SE
92131	Craig, Dale	1993 Chrysler New Yorker Fifth Av...

Records Selected: 29

Telephone Clear List Delete **Print** Exit

5) Enter an easy to find location for the csv file and then click on **Save**.

NOTE: You may also rename the file and change location as desired.



6) Double-click on your Followup.csv file to open with Microsoft Excel and begin applying sorting, filters, etc.



Followup.csv - Microsoft Excel																			
A1	First Name																		
1	First Name	Last Name	Spouse	Title	DOB	Email Address	Address	City	State	Zip Code	Company	CustID	Vehicle	Year	Make	Model	Engine	License	Unit No
2	Ruth	Undervoc	Ian				27745 Pen Fallbrook	CA		92028		6178	661	2007	Volvo	XC90	3.2L, In-Line6, VIN(98)	12/22/2017	3/14/2016
3	Ralph	Story	Anne		6/	rstory@gz	4227 Via L Poway	CA		92064		6221	589	2008	Chevrolet	Impala LS	3.5L, V6, 1XLIMO1	8/4/2016	6/17/2013
4	Ralph	Story	Anne		6/	rstory@gz	4227 Via L Poway	CA		92064		6221	733	2012	Toyota	RAV4 Limite	2.5L, In-Li TOYSTORY	3/30/2018	6/1/2018
5	Aaron	Paul			9/	paaronlh@	1144 Indu: Poway	CA		92064	Aaron's Lc	6248	761	2009	Peterbilt		325 6T824756	ALH06	4/18/2019
6	Aaron	Paul			9/	paaronlh@	1144 Indu: Poway	CA		92064	Aaron's Lc	6248	765	2013	Chevrolet	Express G35	6.0L, V8, 19F843650	ALH02	4/27/2019
7	Rene	Xavier	Ivana		1/	xavier57@	9876 Nebi Santa Ysal	CA		92070		6179	573	1994	Mitsubishi	Montero SR	3.5L, V6, 1OUTFAR	7/6/2018	9/5/2012
8	Rene	Xavier	Ivana		1/	xavier57@	9876 Nebi Santa Ysal	CA		92070		6179	619	2011	BMW	550i	4.4L, V8, 1BMWWBWM	4/4/2018	3/14/2017
9	Rene	Xavier	Ivana		1/	xavier57@	9876 Nebi Santa Ysal	CA		92070		6179	627	2005	Toyota	Tundra SR5	4.7L, V8, 1ABC123	HR2	7/6/2018
10	John	Harkins					23 Blossor San Diego	CA		92126	Harkins 7/	345	556	2002	Toyota	Tacoma Prel	3.4L, V6, 1789GHI	HR3	5/31/2018
11	Dale	Craig		Mr.			San Diego	CA		92131		52	62	1993	Chrysler	New Yorker	Fifth Avenue		4/13/2018
12	Dan	Darrin		Mr.			1902 S.Hy Spring Val	CA		92131		62	546	1997	Honda	Odyssey EX	2.2L, In-Li ROQEWIRT		1/15/2018
13	Mark	Ford		Mr.			696 Fox A San Diego	CA		92131		135	671	2007	Acura	MDX	3.7L, V6, 1999 FREE		4/13/2018
14	William	Halston		Mr.			4824 Briar San Diego	CA		92361		75	643	2010	Dodge	Pickup R150	4.7L, V8, 1NOT HERE1		10/4/2017
15	Victor	Addison		Mr.			621 Cardir San Diego	CA		93133		2	2	1987	Volvo	740 GLE	6BJVS		5/29/2018
16	Toni	Eckhardt		Ms.			221 Hedge San Diego	CA		93133		16	515	1993	Honda	Accord SE	5DRA845		11/20/2017
17	John	Carney		Mr.			9090 Smitl San Diego	CA		94534		169	261	1989	Chevrolet	Pickup C1500	244-8TS		1/15/2018