

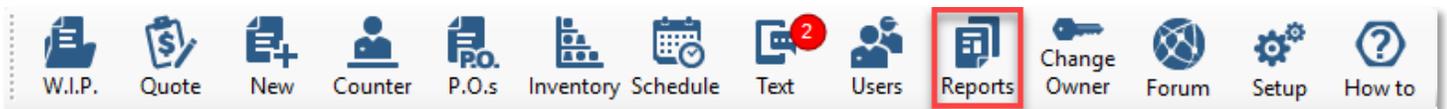
Create a Manager SE Data Export File for Excel (csv)

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

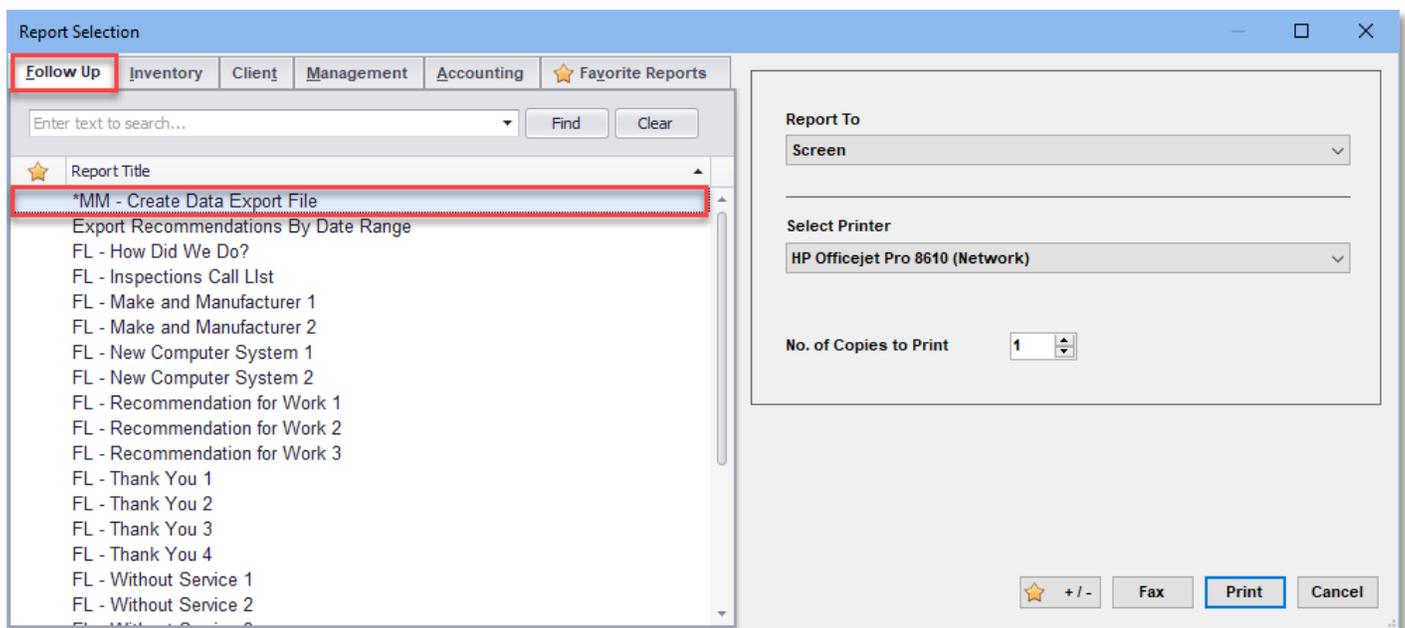
FirstName	LastName	SpouseName	Title	DOB	EmailAddress	
Address	City	State	ZipCode	Company	CustId	
VehicleId	Year	Make	Model	Engine	License	UnitNo
LastInDate	InspDate	MilesPerDay	BalanceDue	CreditAmt	AverageRO	
YTDTotal	CreditHistory	CategoryDescription	MembershipNo			
Remarks	LifetimeTotal	FirstVisited	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.

The screenshot shows the 'Followup' window with the following details:

- Selection Criteria:**
 - Service Date From: 1/ 1/2019 To: 8/12/2019
 - Category: < All >
 - Selection Method: Select by Customer for specified date range.
 - Radio buttons: Select For Cust., Select For Veh.
- Selection Filters:**
 - Vehicle Make: < All > (radio buttons: This Make only, Exclude this Make)
 - Zip Code: < All > (radio buttons: This Zip only, Exclude this Zip)
 - Mileage Since Service: 0 (radio buttons: Include if greater, Include if less)
- Records Selected: 0
- Buttons: Search (highlighted with a red box), Exit

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

The screenshot shows the 'Followup --- View from History' window with a table of customer records. The 'Print' button is highlighted with a red box.

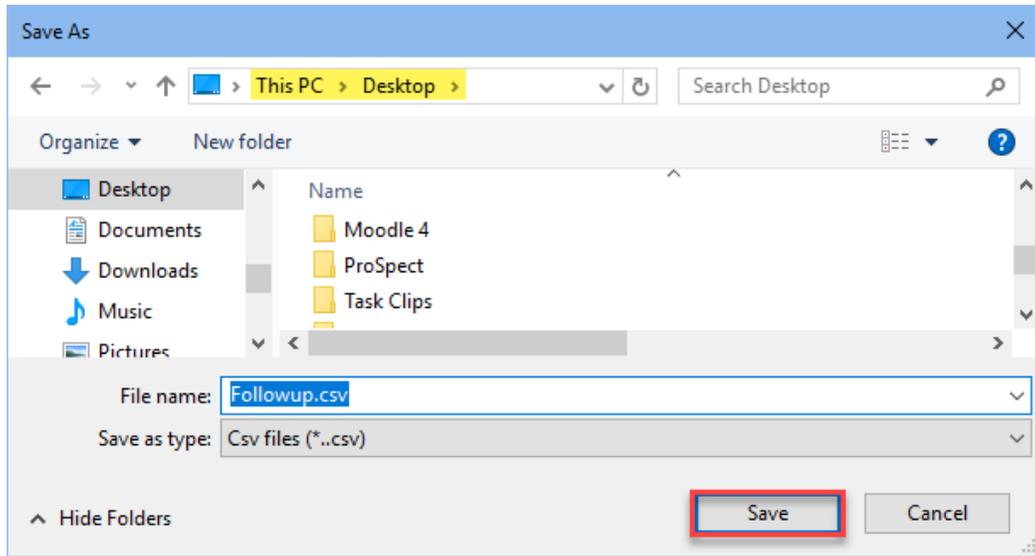
ZipCode	Customer	Vehicle
	Boyd, Stephen	2004 Chevrolet Malibu
90210	McDonnell, Timothy	2004 Acura TL
91082	Van Hoek, Ren	1997 Honda Accord SE
92028	Underwood, Ruth	2007 Volvo XC90
92064	Jones, John	2013 Chevrolet Impala LS
92064	Story, Ralph	2008 Chevrolet Impala LS
92064	Watson, Phil	2013 Volkswagen 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

Buttons: Telephone, Clear List, Delete, Print (highlighted with a red box), 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.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	FirstName	LastName	Spouse	Title	DOB	EmailAdd	Address	City	State	ZipCode	Company	CustId	Vehicle	Year	Make	Model	Engine	License	UnitNo	LastInDate	InspDate	MilesPerC
2	Ruth	Underwo					27745 Peri	Fallbrook	CA	92028		6178	661	2007	Volvo	XC90	3.2L, In-Line6, VIN(98)			12/22/2017	3/14/2016	19
3	Ralph	Story	Anne			6/ rstory@g	4227 Via L	Poway	CA	92064		6221	589	2008	Chevrolet	Impala LS	3.5L, V6, \XLIMO1			8/4/2016	6/17/2013	7
4	Ralph	Story	Anne			6/ rstory@g	4227 Via L	Poway	CA	92064		6221	733	2012	Toyota	RAV4 Limite	2.5L, In-Li TOYSTORY			3/30/2018	6/1/2018	32
5	Aaron	Paul				9/ paaronlh	1144 Indu	Poway	CA	92064	Aaron's Lc	6248	761	2009	Peterbilt		325	6T824756	ALH06	4/18/2019	9/25/2017	32
6	Aaron	Paul				9/ paaronlh	1144 Indu	Poway	CA	92064	Aaron's Lc	6248	765	2013	Chevrolet	Express G35	6.0L, V8, \9F843650		ALH02	4/27/2019	9/25/2017	32
7	Rene	Xavier	Ivana			1/ xavier57	9876 Nebu	Santa Ysat	CA	92070		6179	573	1994	Mitsubishi	Montero SR	3.5L, V6, \OUTFAR			7/6/2018	9/5/2012	5
8	Rene	Xavier	Ivana			1/ xavier57	9876 Nebu	Santa Ysat	CA	92070		6179	619	2011	BMW	550i	4.4L, V8, \BMWWB			4/4/2018	3/14/2017	11
9	Rene	Xavier	Ivana			1/ xavier57	9876 Nebu	Santa Ysat	CA	92070		6179	627	2005	Toyota	Tundra SR5	4.7L, V8, \ABC123		HR2	7/6/2018	10/1/2009	1
10	John	Harkins					23 Blossor	San Diego	CA	92126	Harkins 7/	345	556	2002	Toyota	Tacoma Pref	3.4L, V6, \789GHI		HR3	5/31/2018	6/10/2016	32
11	Dale	Craig		Mr.				San Diego	CA	92131		52	62	1993	Chrysler	New Yorker	Fifth Avenue			4/13/2018	1/31/2004	32
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	10/10/2004	32
13	Mark	Ford		Mr.			696 Fox A	San Diego	CA	92131		135	671	2007	Acura	MDX	3.7L, V6, \999 FREE			4/13/2018	1/16/2015	32
14	William	Halston		Mr.			4824 Briar	San Diego	CA	92361		75	643	2010	Dodge	Pickup R150	4.7L, V8, \NOT HERE1			10/4/2017	1/3/2012	32
15	Victor	Addison		Mr.			621 Cardir	San Diego	CA	93133		2	2	1987	Volvo	740 GLE		6BjVS		5/29/2018	1/2/2004	32
16	Toni	Eckhardt		Ms.			221 Hedge	San Diego	CA	93133		16	515	1993	Honda	Accord SE		5DRA845		11/20/2017	5/28/2004	32
17	John	Carney		Mr.			9090 Smitl	San Diego	CA	94534		169	261	1989	Chevrolet	Pickup C1500		244-8TS		1/15/2018	12/29/2004	7