Sales Activity By Booking Report in Excel Format

This report was created for those who only have ClientBase but do not have Trams Back Office. The report recreates most of the data elements from the Sales Activity report found in Trams Back Office along with the Res Card number, broken down by booking in an exportable format. The information can be used for inclusion in a different Back Office system that allows importation of data.
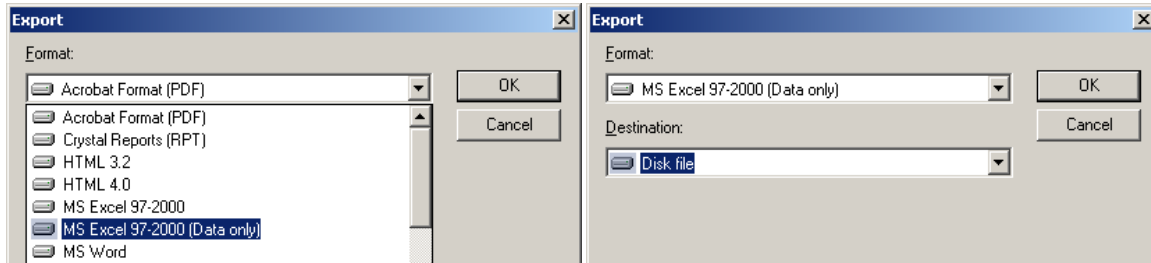
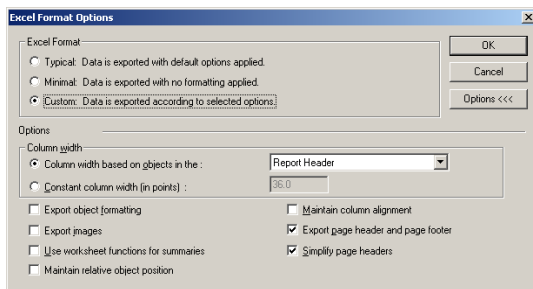**Parameters for report:**
Invoice Issue Date From:
Invoice Issue Date To:

After entering in the above parameters, the report will run and print to screen. To create the spreadsheet, click on the Export Report button .

On the Export screen, choose "MS Excel 97-2000 (Data Only)" for the Format and "Disk file" for the Destination from the available drop-down menus and click OK:

On the Excel Format Option screen, set it to reflect the screen snap below and click OK:

Save the report as a Microsoft Excel 97-2000 spreadsheet, giving it a name and saving it to a location that is convenient for editing or review in Microsoft Excel.