

Accounts (User Activities) - Export Added to Summary Grid (14710) [Enhancement]

Last Modified on 01/25/2023 10:29 am EST

An export option has been added to the Summary grid section of the User Activities screen. Upon selection, all columns and data displayed in the Summary grid are exported to Excel in XLS format.

The screenshot displays the 'ACCOUNTS > USER ACTIVITIES' interface. At the top right, there is a 'VIEW' dropdown set to 'Standard' and a search bar. A red arrow points to a green export icon (a document with a grid) located to the right of the 'VIEW' dropdown. Below this is a summary grid with columns: APPOINTMENTS, TASKS, NOTES, EMAILS SENT, and SITES VIEWED. The grid contains data for various users. An Excel spreadsheet is overlaid on the grid, showing the following data:

1	User	New Proposals/Contracts	New Prospects	Appointments	Tasks	Notes	Emails sent	Sites Viewed
2	Aliena Somers	0	0	0	0	0	0	21
3	Amber Robertson	0	1	0	0	0	0	0
4	Barbara Smith	0	1	0	0	0	0	0
5	David Navarro	0	0	0	0	0	0	6
6	Isabel Navarro	0	0	0	0	0	0	2
7	Lori Sheldt	0	0	0	0	0	1	19
8	Matthew Van Doren	0	0	0	0	0	0	1
9	Michael Shannon	0	0	0	0	0	0	3
10								
11								
12								
13								

Pathway: Accounts > User Activities