Configuring Excel for Shared Sales Contact Management

Excel can be configured as a fairly decent sales contact management application for a small sales team. It's well short of the capabilities of dedicated contact management software, but might well fill a gap between having nothing and the future implementation of something more robust. It should help a busy sales team from getting cross threaded with each other. Here are some tips on how to do it.

Basic Configuration The basic setup of the spreadsheet is to dedicate a column for each field of information you intend to capture. Each row of the spreadsheet represents a single sales opportunity. It's recommended you put a heading in each column, and then freeze those headings so they remain at the top of the spreadsheet regardless of where you scroll. To do this;

1. Highlight the entire row <u>below</u> the headings. Do this by clicking the row number column on the left side of the spreadsheet.
2. Select *Window* > *Freeze Panes* for the menu.

If you scroll the spreadsheet up and down, you should see the headings regardless of which rows are displayed in the rest of the window.

Drop Down Lists Drop down lists ensure a given column contains a range of specific values. For example, you will likely want a column which identifies the person responsible for a given sales opportunity. To set up a drop down list for this column;

1. Click *Sheet2* tab of the spreadsheet. It's best to locate the reference lists themselves on a sheet separate from where you are keep the main list of opportunities.
2. If desired, the tab with the reference lists can be given a more descriptive name such as *References*. To do this, right-click the *Sheet2* tab, and select *Rename* from the pop up menu, type in the new name and *[Enter]*.
3. Put a heading, such as *Reps*, on the top row, and below that, type in the names of the people who you want on this drop down list.

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4. Highlight the heading <u>and</u> the names you entered in the previous step.
5. Select *Insert > Name > Create*
6. Make sure that *Top row* is the only box checked in the dialogue box, then click *OK*.
7. Switch back to *Sheet1* or whatever name you gave you main spreadsheet.
8. Highlight a cell(s) where you want the drop down list to appear.
9. Select *Data > Validation* from the main menu.
10. Select *List* from the *Allow:* drop down list.
11. Type =*Reps* in the *Source:* box, and then click *OK*. Note that Reps is whatever name you assigned in step 3, above.

A down arrow icon should now appear next to the cell you highlighted in step 8, above. If you click the icon, the drop down list should appear. This cell can be copied to other cells, and the drop down list will be copied right along with it. Repeat these steps for other drop down lists.

Other Types of Data Validation If you want to tighten up the input of data to ensure only a specific range of values appears in a given column, you can use some of the other options for data validation. For example, if you want to limit input to a specific range of dates;

1. Highlight the cell or cells you want to validate in this way.
2. Select *Data > Validation* from the main menu.
3. Select *Date* from the *Allow:* drop down list.
4. Ensure *between* is displayed in the *Data:* drop down list.
5. Type in the range of inclusive dates in the *Start date:* and *End date:* text boxes and then click *OK*.

Now, you should only be able to type a date which falls between the two dates you specific in step 5, above. There are a wide variety of validation types, and it's worth experimenting with them all, at some point or another. Also, it's recommended you create a 'prototype' row which contains of the different kinds of validation you want, and then copy the entire row, rather than copying the different types of validation.

Sorting This tip assumes you have kept the main sheet in a simple column and row format, with column headings as recommended in the *Basic Configuration* tip described. To sort the opportunities listed on this sheet;

1. Select the entire sheet which contains the sales opportunities. To do this, click the small box where the column letters and the row numbers intersect – this is in the top left hand corner of the spreadsheet.
2. Select *Data* > *Sort* from the main menu.
3. In the *My data range has* section of the dialogue box – it's down at the bottom -- make sure you have *Header row* selected.
4. In the *Sort by* section, select the column by which you want to sort the table. The headings you entered for each column should appear in this drop down list.
5. If you want to specify additional sort orders, they can be specified in the *Then by* drop down lists, and then click *OK*. The table will be sorted into the desired order. But don't blink, otherwise you'll miss it!

Multiple Concurrent Updates The most significant challenge with Excel is managing the situation where two or more people are updating the spreadsheet at precisely the same time. This is actually pretty straightforward;

1. Move the spreadsheet file you've created above to a shared network drive.
2. Open the spreadsheet, and select *Tools* > *Share Workbook*.
3. Make sure the *Allow changes by more than one user* checkbox is checked.
4. Click the *OK* button at the bottom of the dialogue box. On the title bar of the Excel window, you should see *[Shared]* next to the name of the spreadsheet, and should see this every time you open the file.
5. *Save* the spreadsheet

Now, you can make changes the spreadsheet. A second (or subsequent user) can also open the spreadsheet and make changes as well. To see what changes (if any) have been made by somebody else, *Save* the spreadsheet. When the other person updating the spreadsheets clicks *Save*, they will see the changes you've made.

History With a spreadsheet which is shared as described above, it's just a matter of time before something changes and you need to know who changed it. To look at the history of changes to the spreadsheet;

1. Select *Tool* > *Track Changes* > *Highlight Changes* from the main menu.
2. The *Track changes while editing* box should be checked, assuming you have elected to share the spreadsheet as described in the previous tip.
3. Ensure the *When:* checkbox is checked, and that *All* is displayed in the drop down box next to it.

4. Ensure the *Who:* and *Where:* checkboxes have been cleared. You can use these late to narrow down the range of history records which get displayed.
5. Clear the *Highlight changes on screen* checkbox.
6. Check the *List changes on a new sheet* checkbox, and then click OK.

A new sheet will appear, called *History*, which contains details of who changed what to the spreadsheet and when.

Conclusion This whole approach does depend on users keeping the same basic format of the spreadsheet. A small group should be able to do that without a lot of difficulty. If not, see worksheet protection in the Excel help system for ways of locking down the spreadsheet. Also, these recommendations are provided as a professional courtesy and without any warranty, either stated or implied, with regard to suitability or fitness for any purpose.

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Intellog was founded in 2008 in Calgary, Alberta, Canada. Founder and CEO Terence Gannon is an industry professional with 30 years of experience in the IT field, the last 20 of which were working with well-known, Calgary-based oil & gas producers and service companies. Intellog launched the public beta of its Onramp search engine (http://www.intellog.com/onramp) in March, 2009. Terry can be contacted at terryg(at)intellog.com.

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