

We are currently updating our site; thank you for your patience.

## **SALES STUDIO CONFIGURATION**

## **EXPORT SALES PACKAGE DATA**

The **Export** feature allows you to download your Sales Packages list view as a Microsoft Excel (.xlsx) file. This will enable you to utilise the full extent of all available **Excel** tools with reference to your data.

Excel is particularly useful for organising and analysing sales data and creating graphs and charts from this data (easier to examine than rows of information), as well as forecasting predictions.

If your company is migrating to a new software application, it is important that all the data from the old system is transferred correctly into the new one. This data will need to be put in a 'universal' format recognised by most applications e.g. **Excel**. The data can be exported to Excel and then imported to the new system.

**Ribbon Access:** Sales Studio > Configuration > Sales Packages



- 1. The Sales Packages listing screen will open.
- 2. Here you can view <u>all</u> the Sales Packages on the system.
- 3. Click on the **Export** button.



| Sales Packages - BPO Sales Studio: Version 1.0.0.21 - Example Company |   |          |                              |        |             |                  |               |             |              |               |                 | - 0      | I X                  |                     |         |         |            |        |
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|   | Basic Co  | pier Pac | kage 01                      |        | 1 x Copi    | er + Basic Acces | isories       |             |              | AKM01         | Ŵ               |          | 2                    | 2                   | ! No    | 1       | 15.00      | A      |
|   | Copier P  | 'ackage  | 1001                         |        | Copier P.   | ackage - select  | 1 copier from | 13 types    |              | CP001         |                 |          | 1                    | 1                   | . No    | 1       | 15.00      | A      |
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- 1. Excel will automatically open.
- 2. Your selected data will be reflected in the open spreadsheet.
- 3. You can now utilise Excel's **functionalities** to analyse your data.

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| 2 Toner Package               | Toner Combination Package 01                          | TON002      |                   | 1                           |                 | 4 No                                    | 1                                  | 15.00 A                                   |            |      |
| 3 Basic Copier Package 01     | 1 x Copier + Basic Accessories                        | AKM01       |                   | 2                           |                 | 2 No                                    | 1                                  | 15.00 A                                   |            |      |
| 4 Copier Package 1001         | Copier Package - select 1 copier from 3 types         | CP001       |                   | 1                           |                 | 1 No                                    | 1                                  | 15.00 A                                   |            |      |
| 5 Drum Package 2003           | Drum Package - select 1 drum from 3 types             | DP2003      |                   | 1                           |                 | 1 No                                    | 3                                  | 15.00 A                                   |            |      |
| 6 Black Toner Package 3003    | Black Toner Package - select 1 toner from 3 type      | BTP3003     |                   | 1                           |                 | 1 No                                    | 1                                  | 15.00 A                                   |            |      |
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