

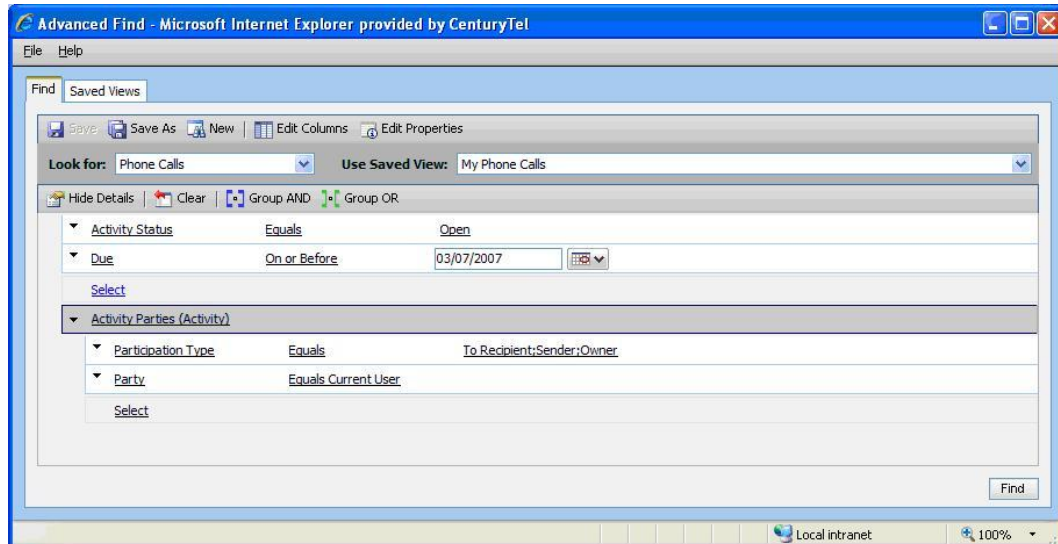
Work while you wait: Create a printable report of phone calls

Everyone has to wait sometimes. Wouldn't it be great to make some of those customer phone calls while you're waiting? Print a report of today's phone call activities to make while you're sitting in your car waiting to pick up your kids, in the doctor's office, or waiting for your next appointment to show up.



Create a query of today's phone calls

1. In the **Activities** list, in the **Type** list, select **Phone Call**.
2. In the **View** list, select **My Phone Calls**.
Note: Select the fields in this order, or you might not see all the available options.
3. On the **Standard** toolbar, click **Advanced Find**.
Advanced Find will display the default query for the view.
4. To further refine the query, click **Show Details** and then create a search that looks like this:



This query includes overdue phone call activities.

5. If you include information about the call in the **Description** box, you can include it in your report. To do this, click **Edit columns**.
 1. In the **Edit Columns** dialog box, under **Common Tasks**, click **Add Columns**.
 2. In the **Add Columns** dialog box, select the **Description** check box, and then click **OK**.
6. Make any other changes to the columns, such as their order or how they are sorted, and remove any unwanted columns. Then click **OK** to save your changes.
7. Click **Find** and verify you are getting the results you expected, including that each record

has a complete phone number.

8. Click **Back to Query**, and then click **Save As** to save the updated query as a view you can use repeatedly, such as "Printable list of calls for today."

You can find your new view on the **Saved View** tab in Advanced Find and as a view in the **Activities** list. Select **Phone Call** in the **Type** box, and then your view is displayed in the **View** list.

Print the phone call list

1. In the **Activities** list, in the **View** list, select the view you just created, such as "Printable list of calls for today".
2. Resize any columns that are difficult to read by dragging the dividers in the column headings.
3. Click **Print**, select whether to print records on the current page or all pages, and then click **OK**.
4. On the **Preview** page, click **Print**, and then click **Print** again.

Tip: If you have too many columns, you may have to change the paper orientation to Landscape. To do this, in the **Print** dialog box, click **Preferences**, and then under **Orientation**, click **Landscape**. You can also resize columns in the Print Preview view by dragging the dividers between columns. These changes are not saved between printings. Due to the limitations of the print function, you may need to customize your query to remove some columns so that all the data you do want will fit on one page.

After you've completed the phone calls, don't forget to update the phone call activities as completed.

Now that you've created and saved your printable phone list view, you can reuse it every day and stay on top of those important phone calls.