

Creating a List in Excel of all Customers and Their Emails

09/20/2024 4:58 pm EDT

Dealers frequently request a list of their customers and their emails. Below are instructions on how to retrieve this information and export it to an excel file.

*note – this method only provides the email on the customer record, not the bill to email used for invoices/statements.

1. Log into Managely click on CRM and then click Customers



2. Click on the ellipsis (the three vertical dots) to the right of the customer # column, click on columns and check the email check box; click Apply



3. Click the Export to Excel button



4. You will now have an Excel file with all of your active customers and their emails

□

