

# DASHBOARD TOOLKIT

## 10/03/2019





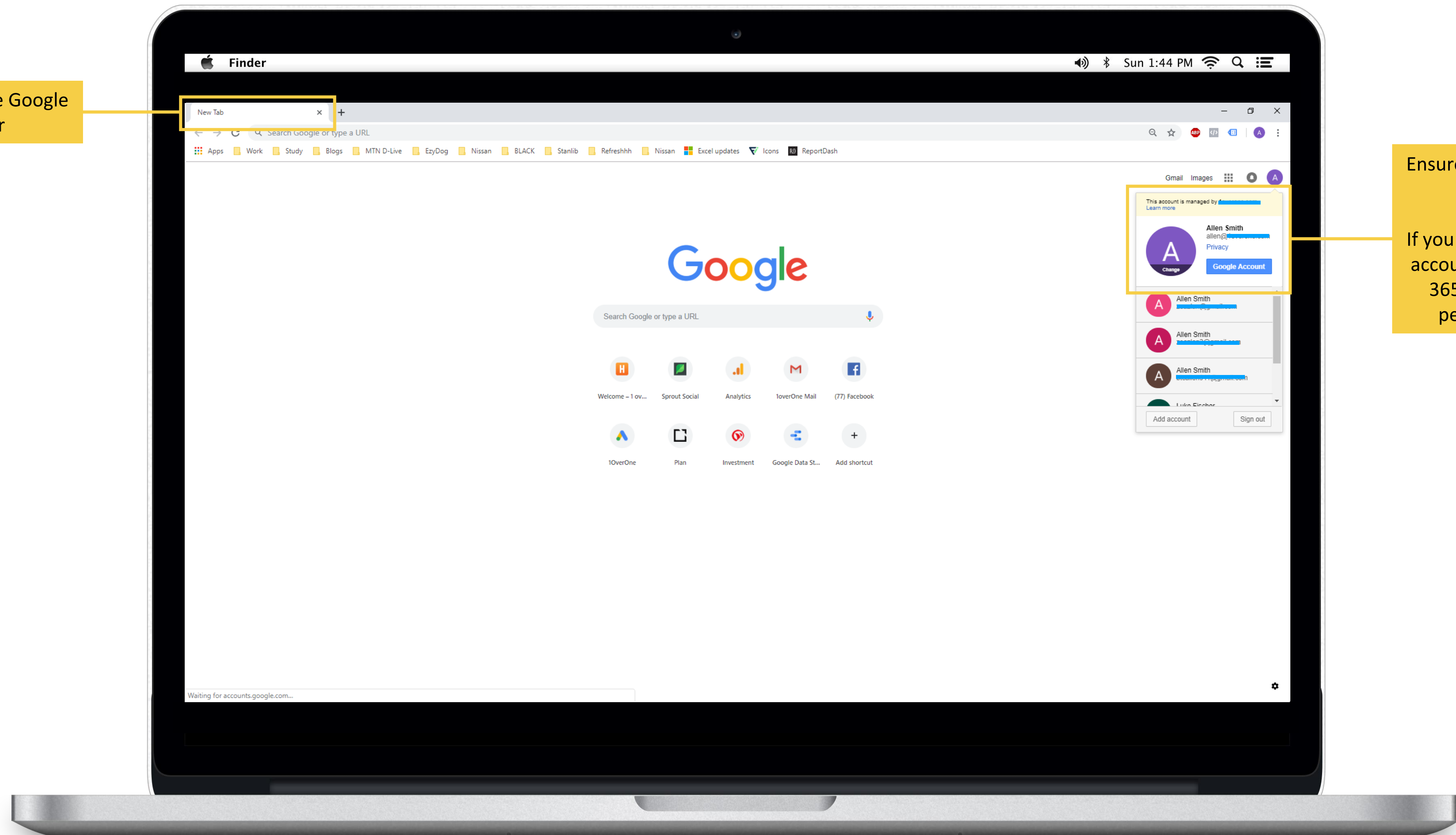


# MAKING A COPY OF THE GOOGLE SHEETS

Assumptions:  
Chrome is installed  
You have a Google account

# Step 1

Open a 'New Tab' in the Google Chrome browser



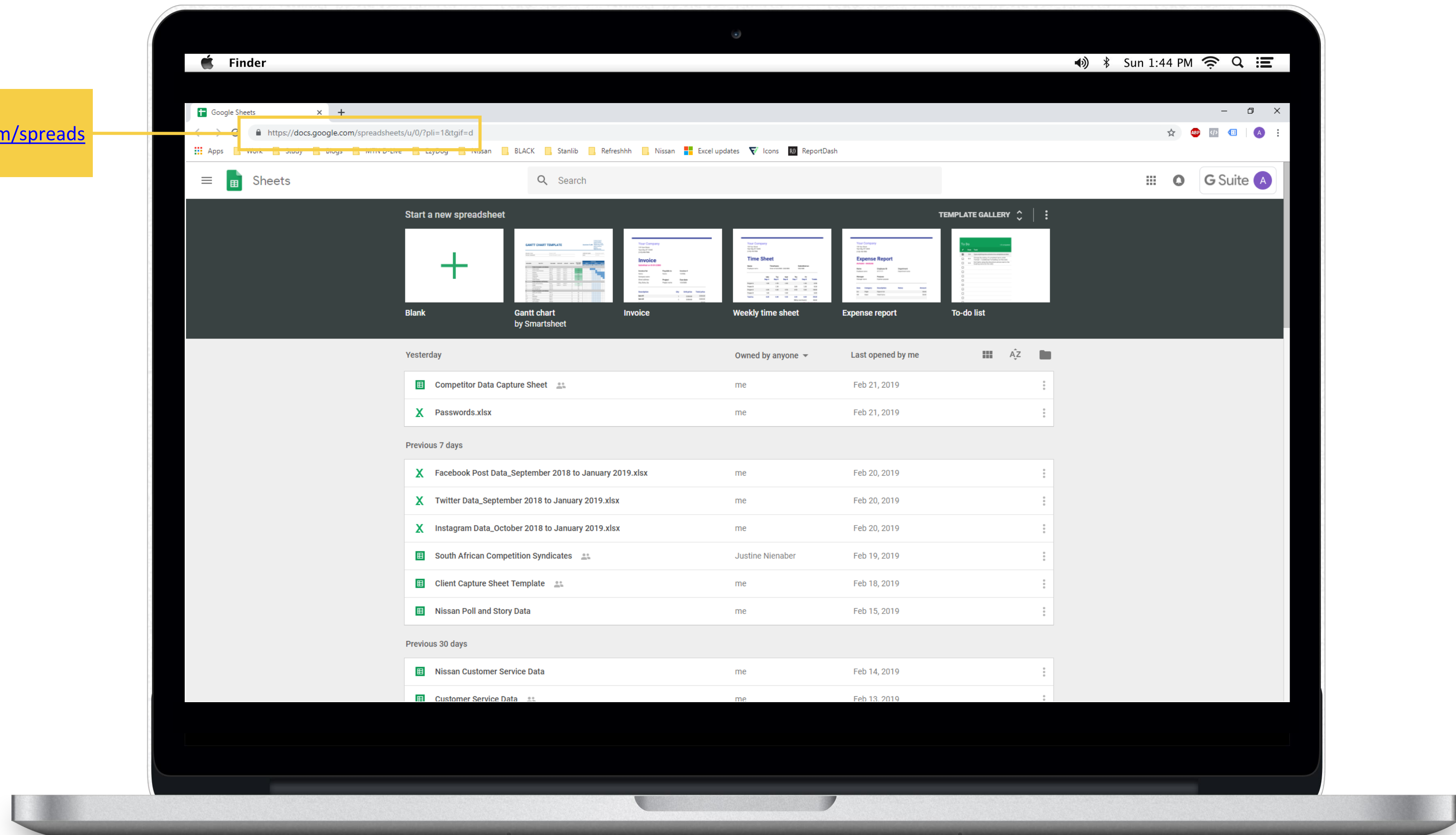
Ensure you are logged into your work email address.

If you do not have a work Gmail account and instead use Office 365 then you can use your personal Gmail account.



# Step 2

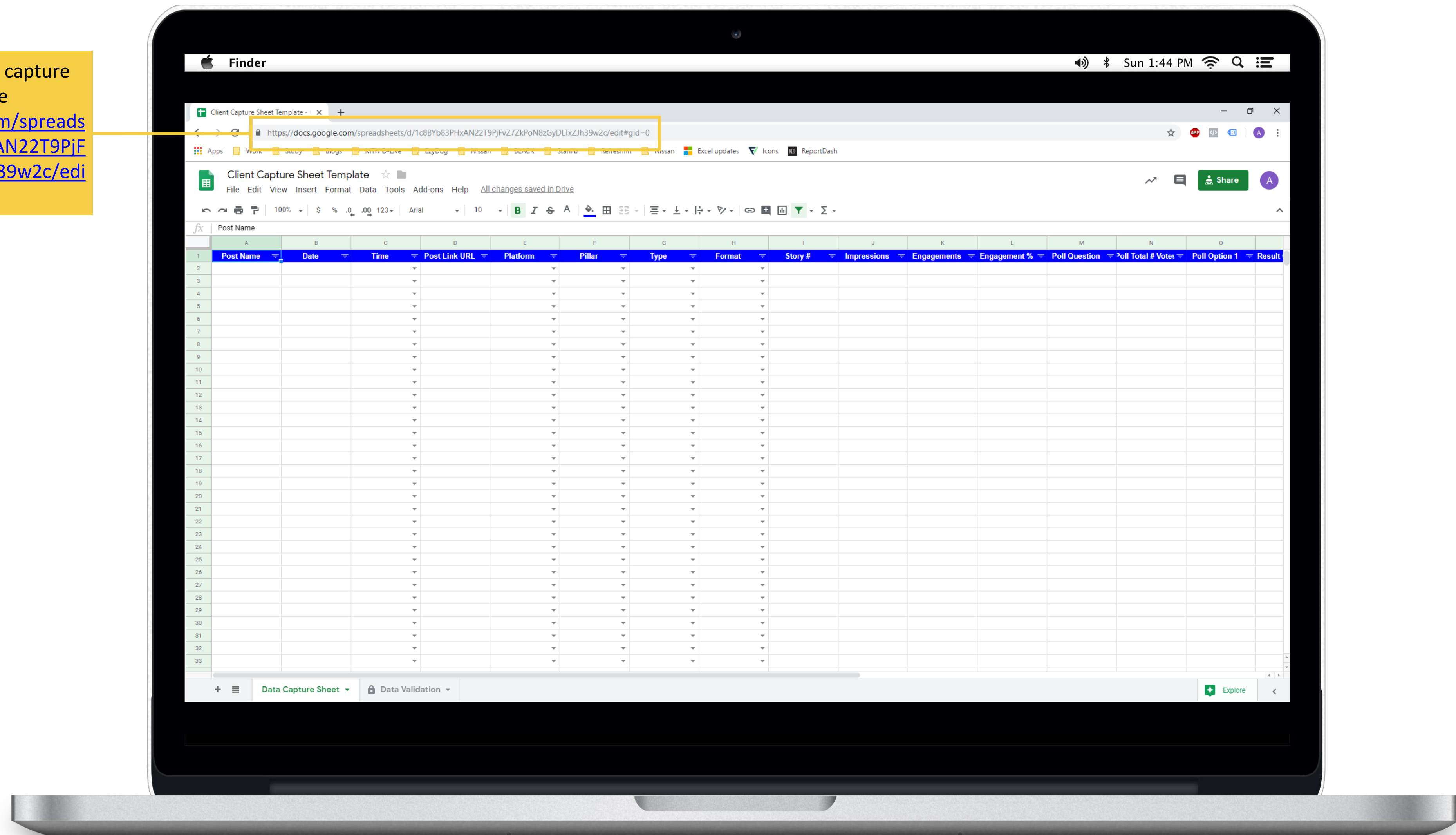
Navigate to  
<https://docs.google.com/spreadsheets>





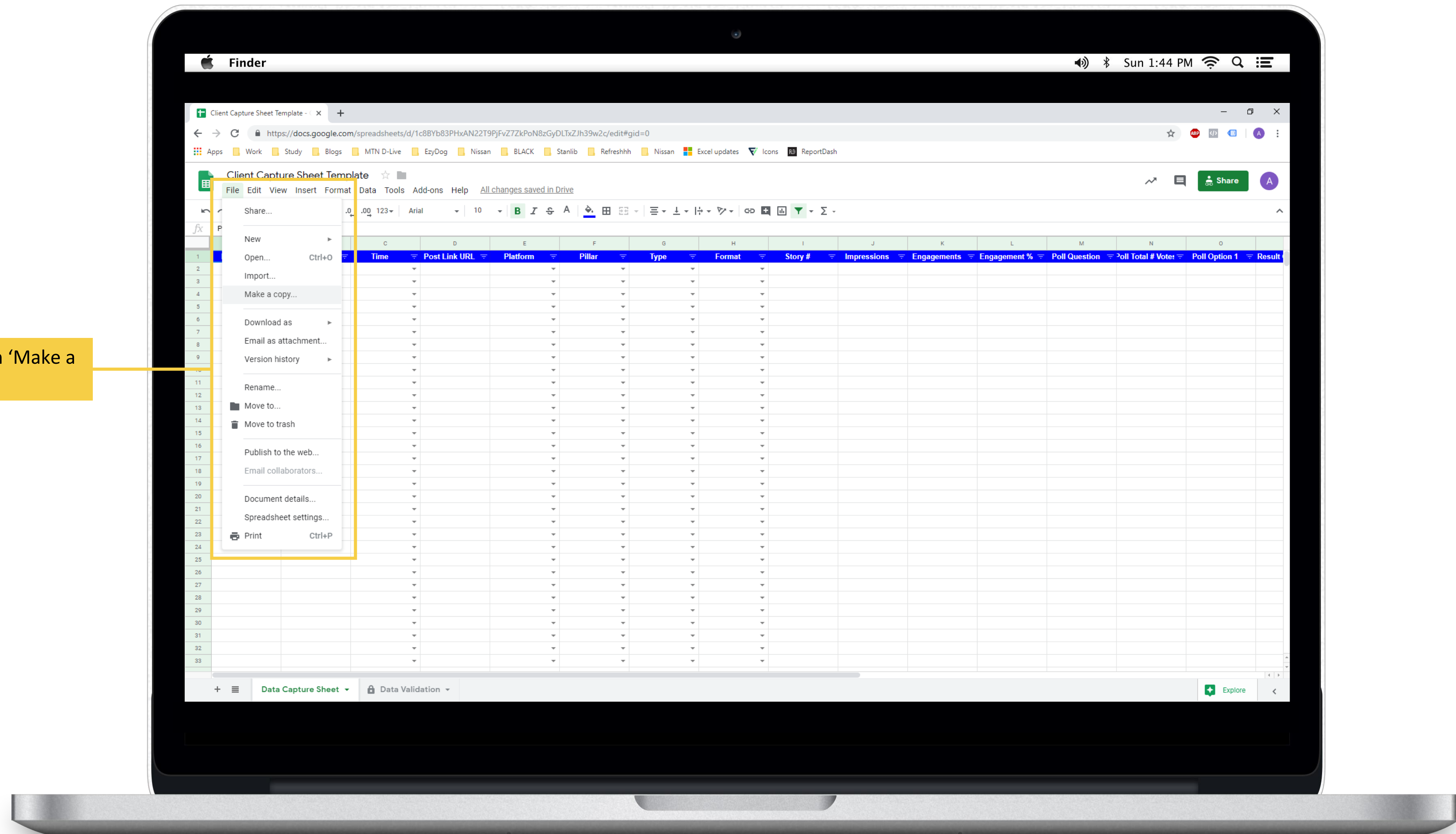
# Step 3

Navigate to the client capture sheet template  
<https://docs.google.com/spreadsheets/d/1c8BYb83PHxAN22T9PjFvZ7ZkPoN8zGyDLTxZjh39w2c/edit#gid=0>



# Step 4

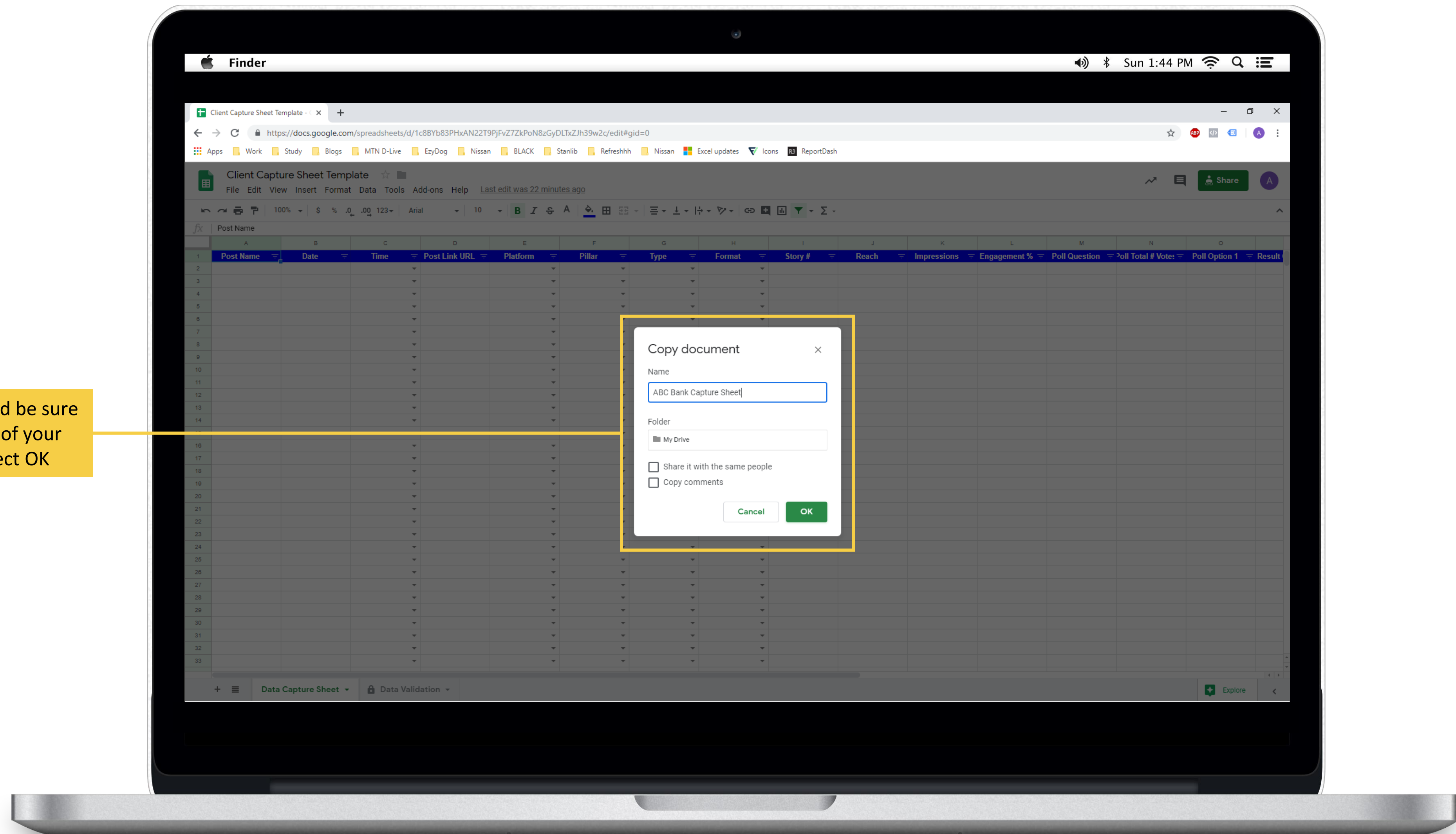
Click on 'File' and then 'Make a copy...'





# Step 5

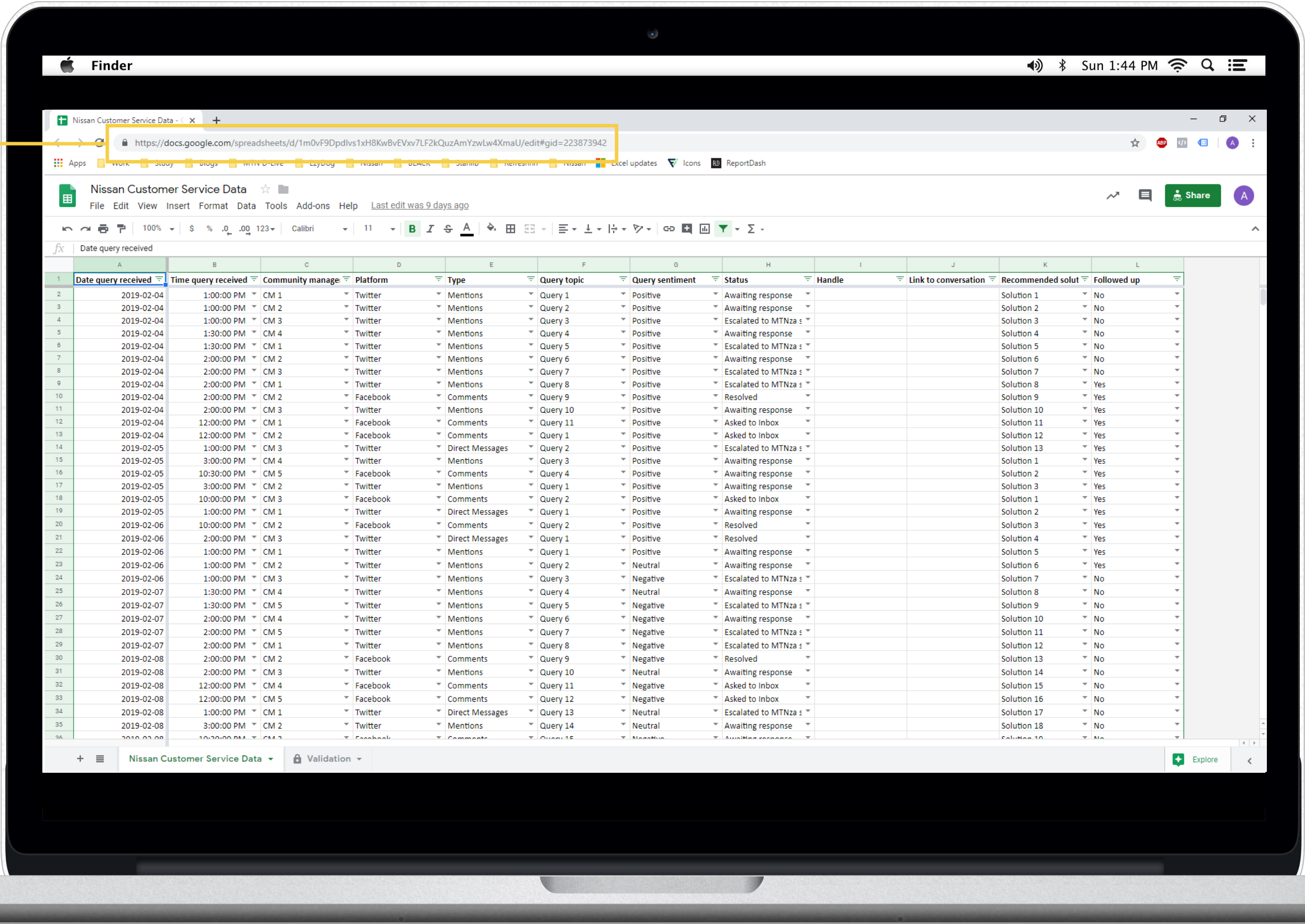
Rename your sheet and be sure to include the name of your client and then select OK



# Step 6

Navigate to the customer service sheet template

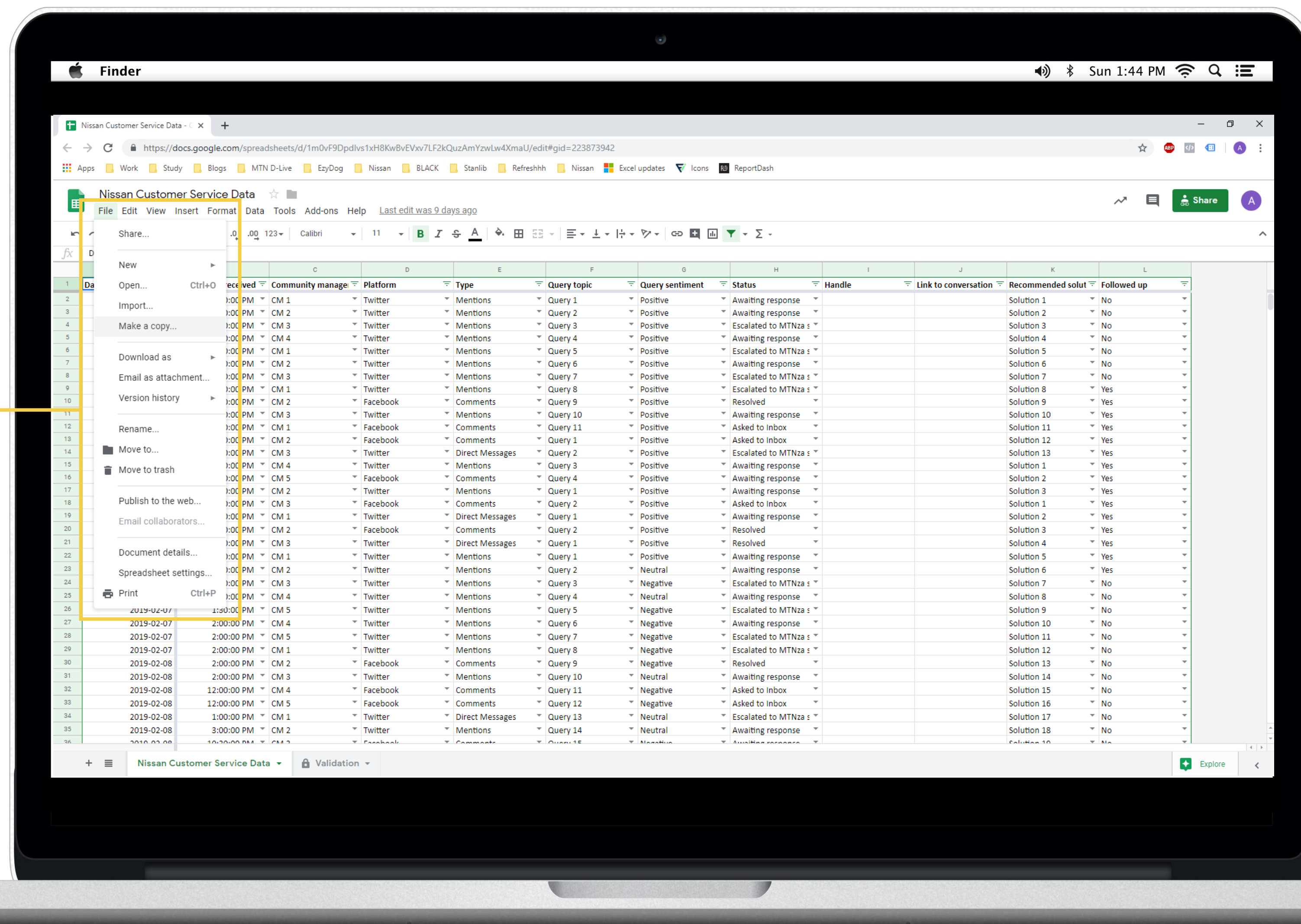
<https://docs.google.com/spreadsheets/d/1m0vF9Dpdlvs1xH8KwBvEVxv7LF2kQuzAmYzwLw4XmaU/edit#gid=223873942>





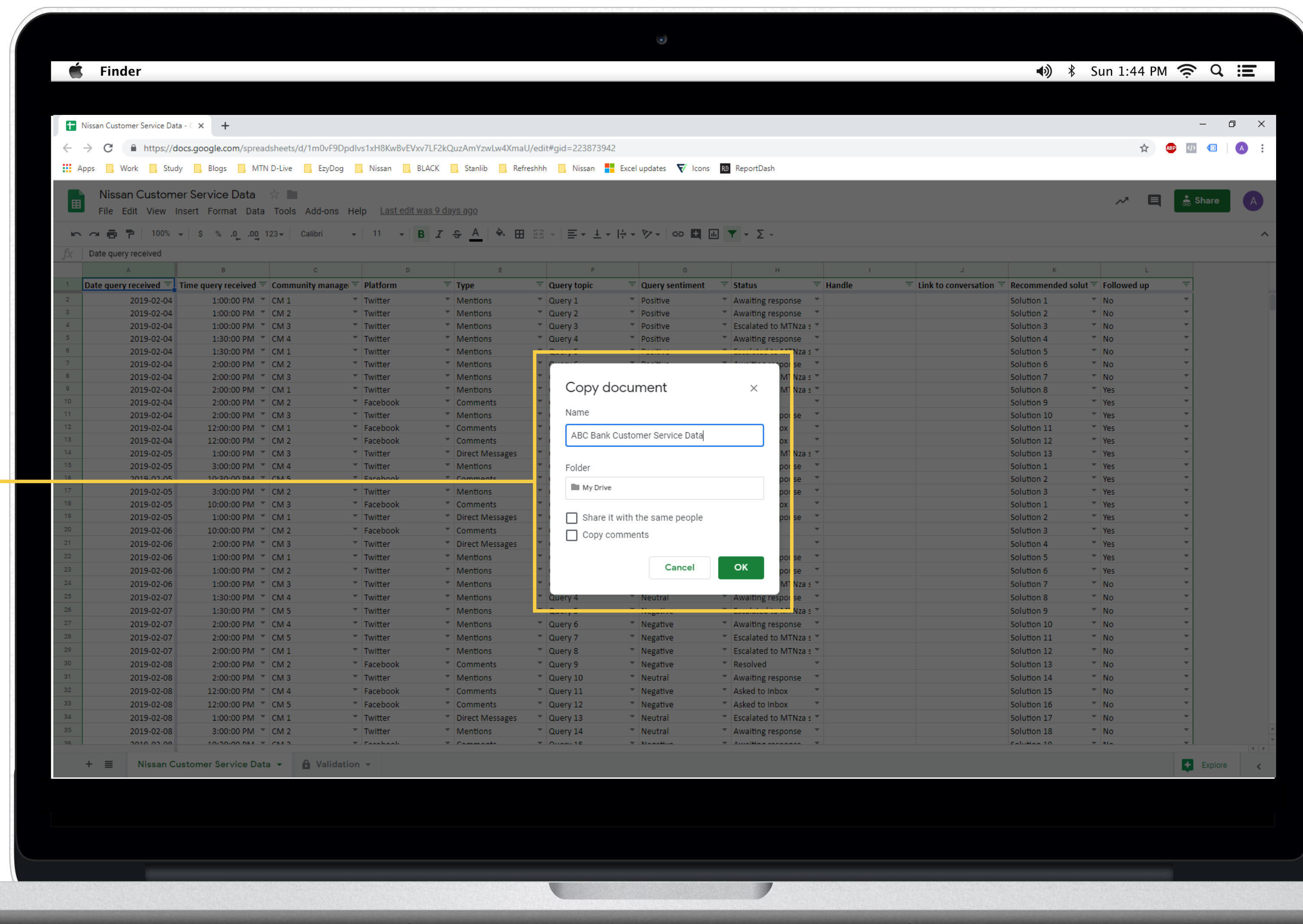
# Step 7

Click on 'File' and then 'Make a copy...'



# Step 8

Rename your sheet and be sure to include the name of your client and then select OK





**Thanks**  
**Allen.smith@tbwa.co.za**