

# Fast•Class File

SmartOffice

Volume 32: Export to Excel

Export utilities in SmartOffice make it possible to export data from data summary screens, set membership data, and dynamic report results directly into Microsoft Excel.

Before exporting data into Excel, the **Smartlink for Spreadsheet Export** and **Smartlink for Excel Reports** utilities will need to be installed.

To install the utilities needed to export into Microsoft Excel –

- Select **User Setup** from the main menu.
- Select **Installations**.

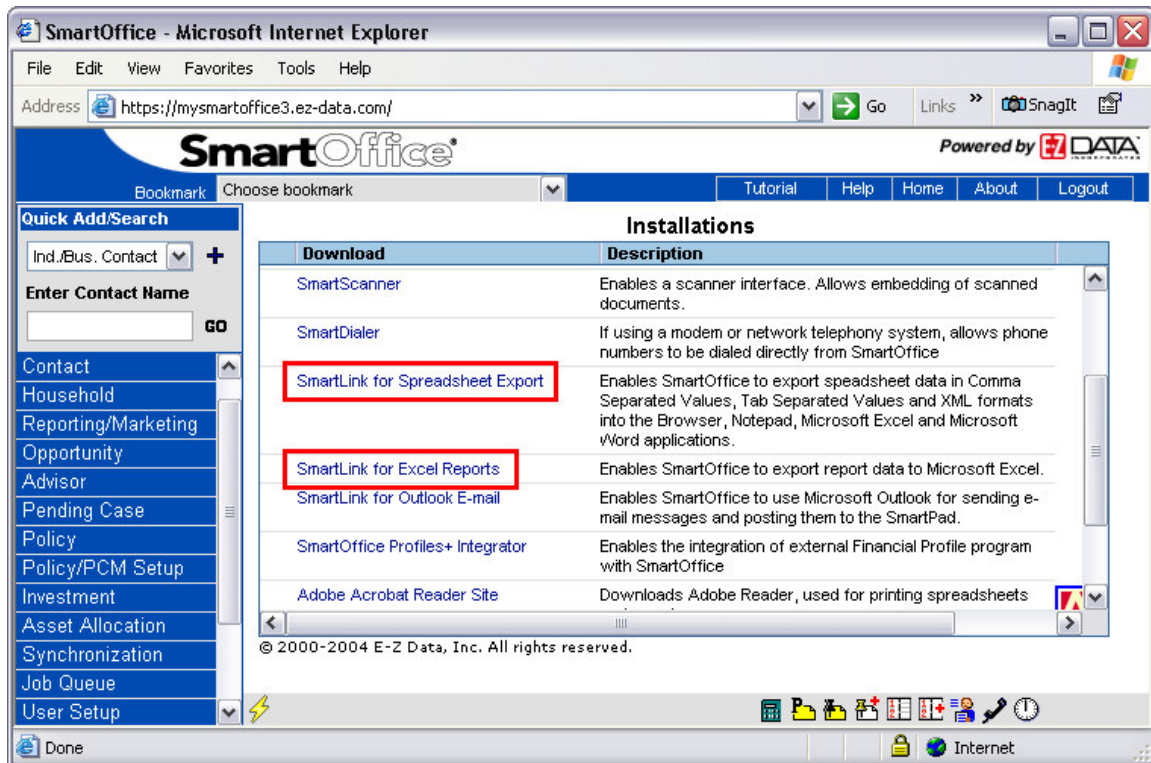


Figure 1: The Installations screen (Smartlink export utilities highlighted).

- Select the **Smartlink for Spreadsheet Export** link in the **Installations** page. If the utility is already installed, SmartOffice will display an installation confirmation screen. If the utility is not installed, follow the instructions to install the utility.
- Select the **Smartlink for Excel Reports** link in the **Installations** page. If the utility is already installed, SmartOffice will display an installation confirmation screen. If the utility is not installed, follow the instructions to install the utility.

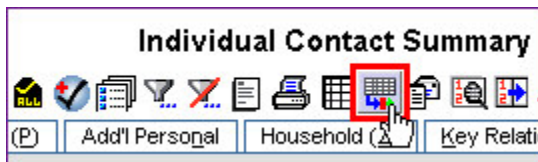
After the **Smartlink for Spreadsheet Export** and **Smartlink for Excel Reports** utilities have been installed, data can be exported from SmartOffice spreadsheets directly into Microsoft Excel.

To export spreadsheet data out of SmartOffice directly into Microsoft Excel –

- Open the spreadsheet in SmartOffice with the data to be exported. Spreadsheet data can be exported from virtually any summary spreadsheet (Contact, Policy, Investment, etc.), set membership screens, and dynamic report results.

*Note: Only the data on display will be exported. If the data on display is not the data needed for the export, use the **Customize Spreadsheet Layout** button in the toolbar to format data for the export.*

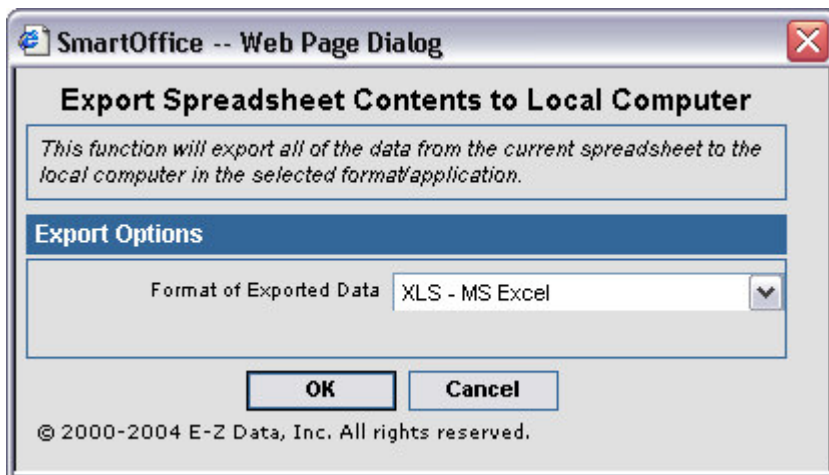
- With the data formatted for export, click the **Spreadsheet Export** button.



**Figure 2: The Spreadsheet Export button in the Individual Contact Summary Toolbar.**

- The **XLS – MS Excel** file format will automatically be selected in the **Format of Exported Data** field.

*Note: The drop-down in the **Format of Exported Data** field can be used to export data in CSV (Comma Separated Value), XML, or Tab Separated formats.*



**Figure 3: The Export Options screen (XLS- MS Excel format selected).**

- Click **OK** to export data.
- **Smartlink for Excel Reports** will open a new worksheet in Excel populated with the selected data from SmartOffice. A row will be added to the top of the worksheet with column header information referencing the data stored in each column.

	A	B	C	D	E
1	Contact Name	Type	All E-mail Addresses	DOB	Review Date
2	Abernathy, Brad	Client	gsad@sdb.com	3/19/1942	9/19/2005
3	Ackerman, Joseph M.	Client	dr_joe@gmail.com	2/27/1953	8/27/2005
4	Ackerman, Kathleen M.	Client	katie@yahoo1.com	1/3/1955	3/14/2005
5	Adams, Frank	Client	f_adams@hotmail.com	5/29/1968	11/29/2004
6	Adams, Margaret	Client	margaret_adams4demo@hotmail.com	3/19/1942	9/19/2005
7	Adams, William	Client	bill_568@aol.com	4/14/1967	6/30/2004
8	Adcock, Martin	Client	trojan_fan_1@yahoo.com	1/11/1963	7/11/2005
9	Alexander, Felicia	Client	dmm@yahoo.com	4/1/1945	7/21/2004
10	Alexander, Sherman	Client	a_sherm@hiltonco.com	5/20/1937	1/15/2005
11	Anderson, Kathy	Client	K-Anderson@hotmail.com	8/10/1971	4/20/2004
12	Anderson, Mike	Client	mike_anderson@beelineads.com	1/4/1959	1/15/2005
13	Ansong, David M.	Client	dr_dave@gmail.com	7/20/1953	2/15/2005
14	Ansong, Judy A.	Client	judy_ansongdemo@hotmail.com	1/3/1955	1/15/2005
15	Antille, Eugene	Client	Eantille@abcmfg.com	12/16/1956	11/16/2004
16	Arrieta, Michael J.	Client	marrieta@acmecorp.com	10/20/1954	12/31/2004

Figure 4: Exported data in Microsoft Excel with column header information.