Fast Class File | SmartOffice®

## Excel Templates

**This Fast Class covers the simple process of linking a Microsoft® Excel Template to a SmartOffice Dynamic Report.**

**Before linking an Excel Template to a Dynamic Report:**
- The Excel file must have the same column layout as the Dynamic Report
- The Excel file must be saved in .XLT or .XLTX format.

The Excel Template linking feature makes it possible to take advantage of PivotTable® features in Microsoft® Excel. PivotTable® features make it possible to easily analyze large amounts of data 'on-the-fly' – identifying patterns and relationships by adjusting data views. Learn more about Microsoft® Excel PivotTable® Features through the following Microsoft® training resources –

Microsoft® Excel PivotTable® Overview
Microsoft® Excel PivotTable® report 101

## To Link an Excel Template (.xlt) to a Dynamic Report in SmartOffice:

Before linking the template, the template must be saved in SmartOffice.
- Select **Reporting/Marketing** in the Side Menu.
- Select **Excel Templates**.
- Perform an open search to open the **Excel Template Summary** screen.
- Click the **Add** button.
- Give the Excel template a name in the **Description** field of the **Excel Template Detail** screen. Add Keywords as necessary.
- Use the **Browse** button in the **Upload Template** section to locate the Excel template (xlt file) locally.
- Click **OK** to save the template in SmartOffice.

**Once a template is saved in SmartOffice, it can be linked to a dynamic report.**
- Select **Reporting/Marketing** in the Side Menu.
- Select **Dynamic Reports**.
- Search for the dynamic report that the Excel template will be linked to.
- Select the dynamic report in the **Dynamic Report Summary** screen and click the **Modify** button in the toolbar.
- On the **Name/Description** tab of the **Dynamic Report** Screen, click the **Excel Templates** link in the **Dynamic Report Name/Description** section.
- Perform a search for the appropriate Excel template.
- Click the hypertext link of the selected Excel template in the **Excel Template Summary** screen.

• The selected template will be added to the Dynamic Report screen and linked to the dynamic report.

• Click **OK** to save the new dynamic report settings.

## To Run a Dynamic Report linked to an Excel Template:

• Select **Reporting/Marketing** in the Main Menu.

• Select **Dynamic Reports**.

• Search for the dynamic with a linked Excel template.

• Select the dynamic report in the **Dynamic Report Summary** screen.

• Click the **Export Contents to External Application** button.

• SmartOffice will populate a new Excel spreadsheet with data captured in SmartOffice in the format defined by the Excel template.