

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**.
- 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 list (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 1: 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.*

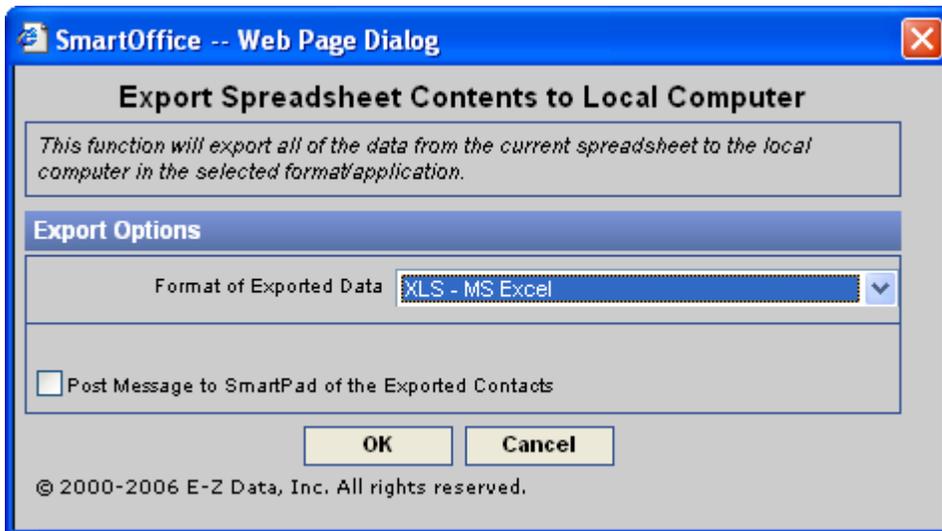


Figure2: The Export Options screen (XLS- MS Excel format selected).

- 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.

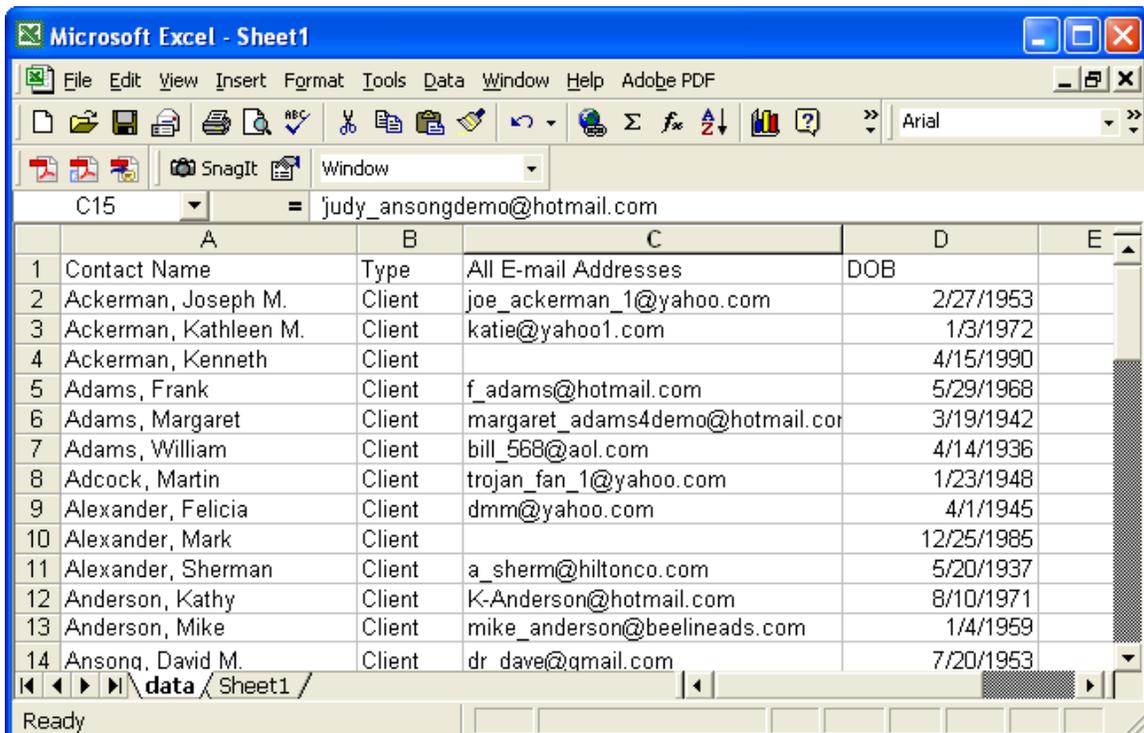


Figure 3: Exported data in Microsoft Excel with column header information.