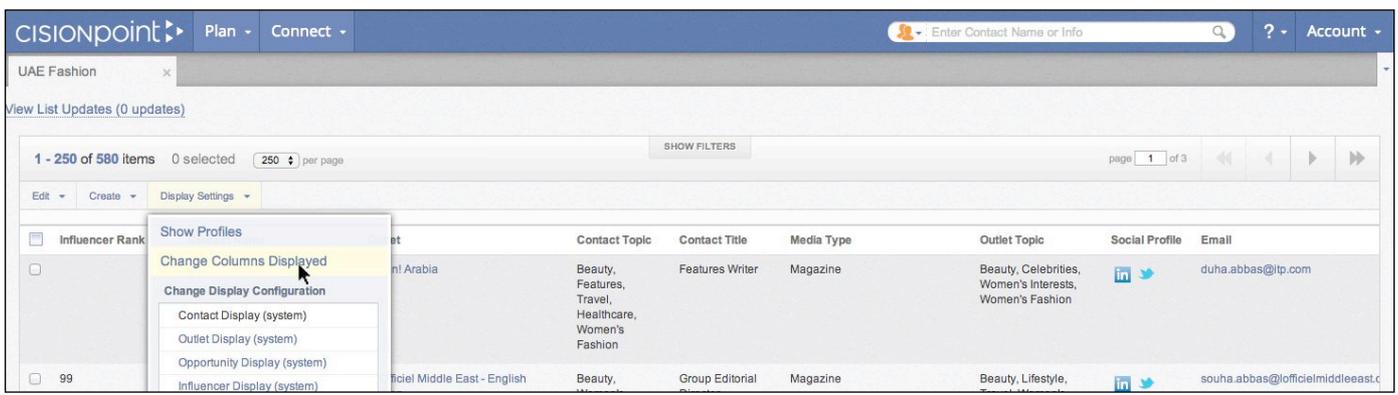


Exporting to Excel

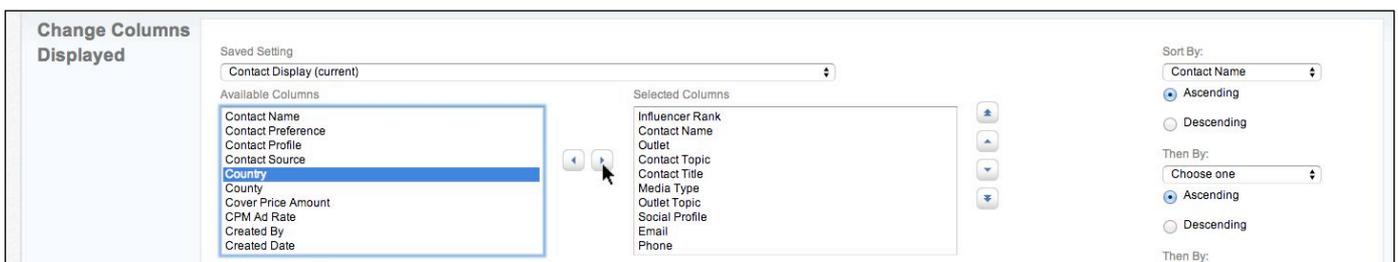
Once you have performed a **Search** or opened a **Saved List**, you can export the information from the displayed **Contact**, **Outlet** or **Opportunity** records into an Excel (.xls) or CSV (.csv) document.

Change Columns Displayed

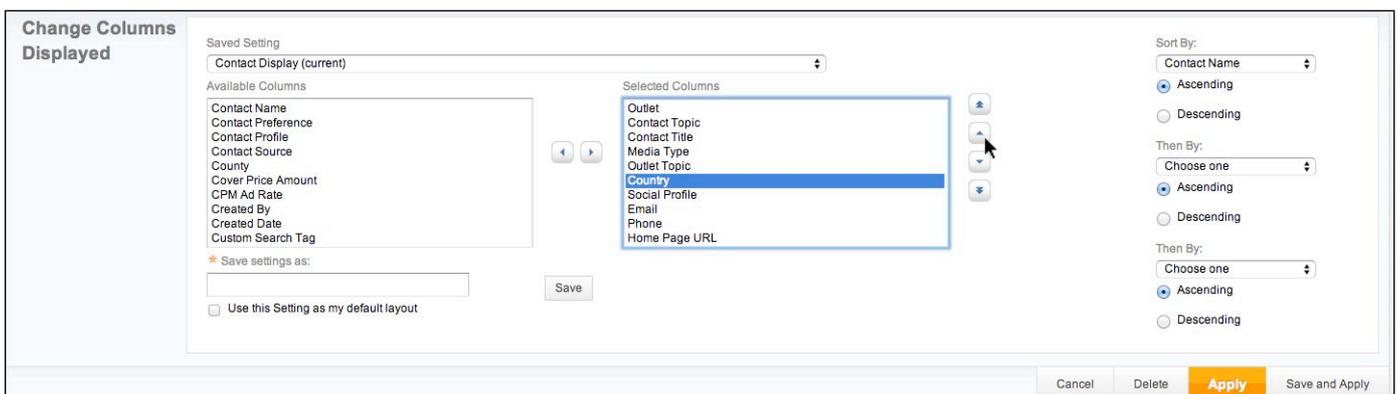
The columns displayed on the screen are the columns that will be included in your export. If you wish to change which columns are being displayed (and therefore which columns will be exported), go to **Display Settings** and select **Change Columns Displayed**:



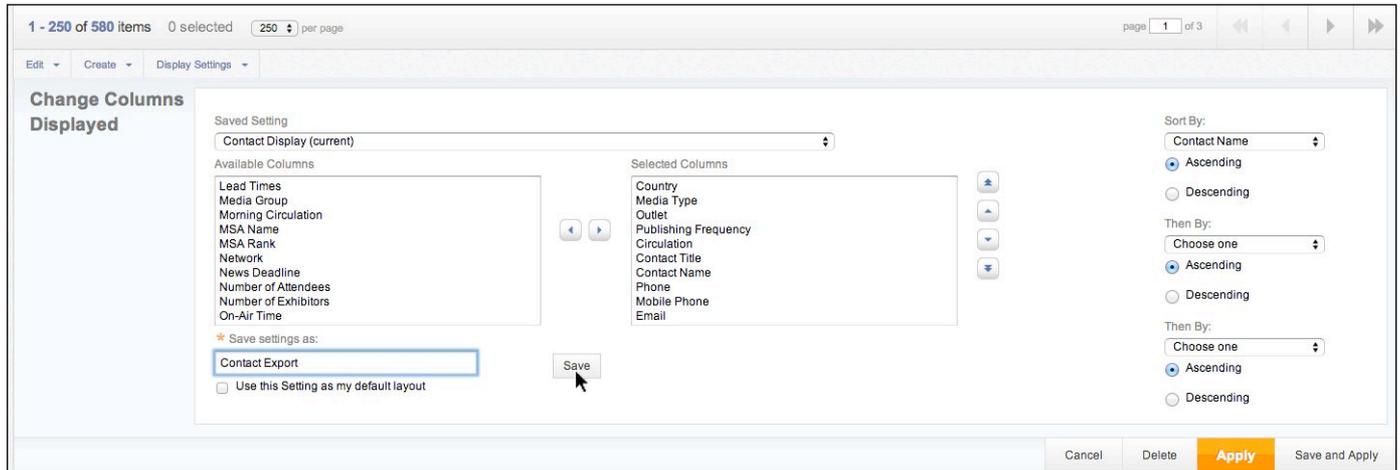
Select the fields you want to include from the **Available Columns** section on the left and use the arrows to move them across to the **Selected Columns** section:



You can change the order of the selected columns using the **Up** and **Down** arrows, and apply a **Sort Order** using the **Sort by** options on the right of the screen (optional):



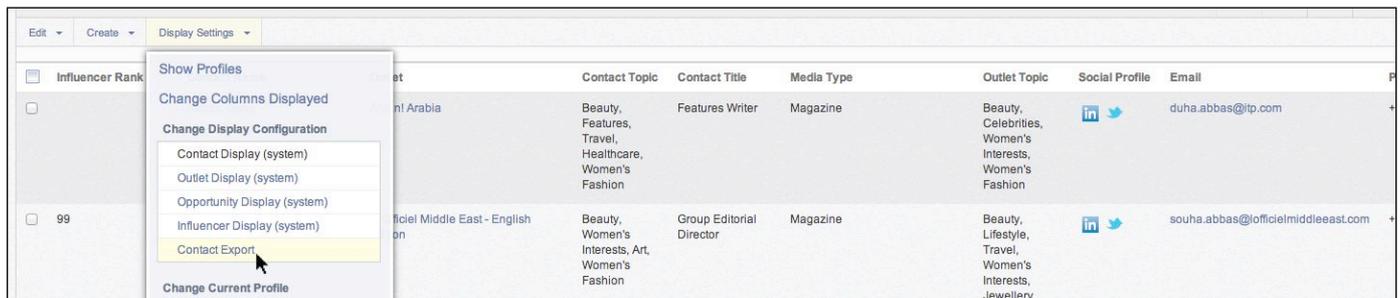
Once you have selected the columns you want and got them in your preferred order, you can either click **Apply** to make the changes, or save your selection as a template so you can use it again in the future without having to select the same columns and order again. Enter a name for your template and either press **Save** and then **Apply**, or use the **Save and Apply** button instead:



The columns displayed on the screen will change to reflect your selection, and you are now ready to export them to **Excel**.

Saved Templates

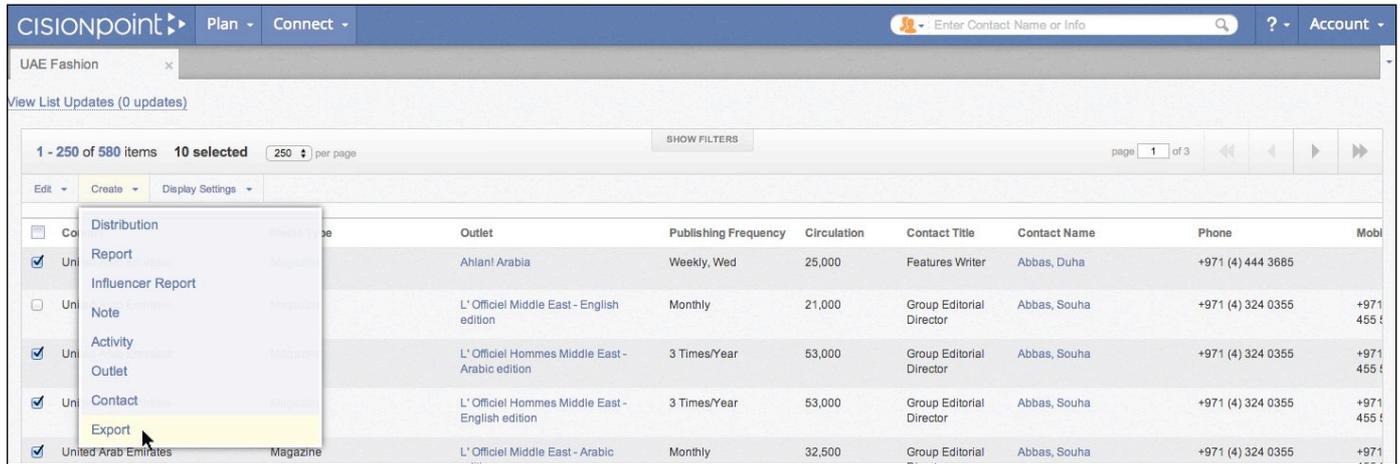
If you saved your column selection as a template, you can access it again in the future from the **Display Settings** menu - click the name of the template and the columns will change:



Note: Saved **Column Display** templates are unique to your log-in - any other users on your account will not have access to the templates you create and will need to make their own!

Create Export

If you only wish to include certain records in your export, select the ones you want by ticking them (you can also click the top **Tick Box** to either **Select all items on the page** or **Select All items from your list** if you wish). Otherwise, leave them unticked and select **Export** from the **Create** menu:



Select whether to just include the columns displayed - you can also include the shipping address, mailing address, or contact and outlet profiles in your export without them being displayed by selecting from the **Export Templates**:



Choose whether to create a CSV or Excel file (both open in Excel) and click **Create Export**:



Your file is generated in a Zip folder in the bottom left corner of the screen which you can click on to open and access your exported document:

