

Creating Labels to Export to Excel from Agvance

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In Accounting, go to *Accounting Reports / Accounts Receivable / Customers*.

Select *Labels* from the list of reports on the left side of the screen. Then select the customers for whom you want to create labels.

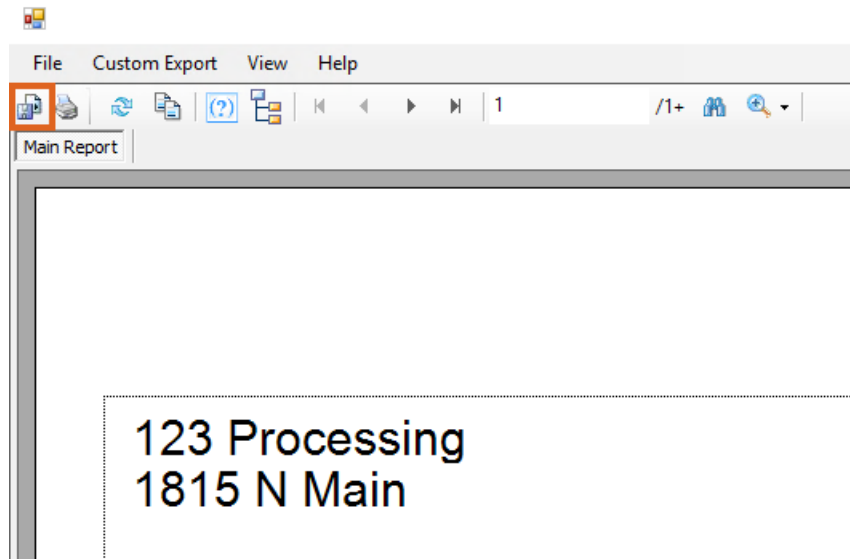
The screenshot shows the 'A/R Customer Reports' dialog box. On the left, a list of report types includes 'Labels', which is highlighted. Below this list are 'Print' and 'Preview' radio buttons, with 'Preview' selected. At the bottom left are 'Load Set' and 'Save Set' buttons. The main area is titled 'Report Criteria' and contains several sections: 'Select Locations' with 'All' and 'Select' buttons and a 'Group by Location' checkbox; 'Select Customers' with a dropdown menu showing 'Avery 5160' and 'All', 'Select', and 'Cust. Class.' buttons; 'How Many Copies' set to 1; checkboxes for 'Include ID', 'Include City/St/Zip', 'Include Address 1' (checked), 'Include Address 2' (checked), and 'Include Address 3'; 'Sort By' options: 'Name' (selected), 'ID', and 'Zip Code'; 'Name' options: 'First Last' (selected) and 'Last, First'; a 'Filter' button; a 'Use Federal Permit Expire Date' checkbox with a date field; and a 'Show Customers With' dropdown set to 'Both'. At the bottom right are 'OK' and 'Cancel' buttons. A 'Setup Label' button is also visible.

Check the boxes to *Include Address 1* and *Include Address 2* (few locations have a need for Address 3). To print or export the ID, select the *Include ID* checkbox.

The selection of *Name* by *First, Last* or *Last, First* does not work for the Helena locations, so leave the default setting as is.

At this point, it is possible to use the filter to restrict the number of labels or to print labels for a geographic area.

Select **OK** to preview selections. If everything is included as needed, choose the **Export Report** button to export the labels.



Choose *Microsoft Excel (xls)* as the *Format* and select **OK**. Navigate to the appropriate folder and enter a *File name*. Choose **Save**.

The file can then be opened in Excel.