

Exporting Reports from Agvance

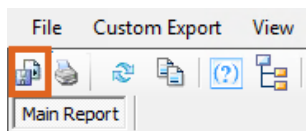
Last Modified on 10/17/2024 1:07 pm CDT

Reports and grids can be exported into various file formats (i.e., Word or Excel document). The report can then be accessed later using Word, Excel, etc. Lengthy month-end reports can be exported and saved in a specified location. Many customers export reports to Excel to do additional sorting and totaling.

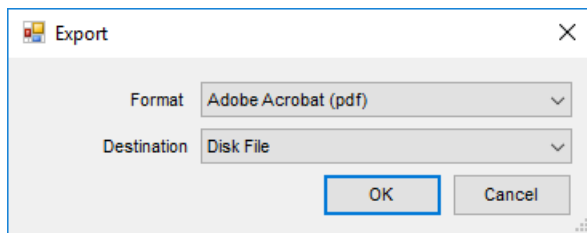
If reports are exported for archival purposes, be sure to save the reports in a location that is included in the daily backup.

Export Button

To export a report, preview the selected report. In the toolbar above the report, select the **Export Report** button.



A window with two drop-down menus display.



The *Format* drop-down contains the file type options available. These options will be different depending on what programs are installed on the computer. The most popular option is *Acrobat Format (pdf)*, which is often used to archive reports. Excel and Word are also available.

The most common *Destination* is *Disk File*. After selecting **OK**, a window will display to name the file and specify where to save it.

Right-Click Export

Any grid in Agvance can be exported by right-clicking the header row and hovering over *Export*. From there, choose to what program the information should be exported.

Note: The *To Excel 2007* option has a larger worksheet size and has different formatting options on the grid cells compared to the *To Excel* option.

Make a Deposit

Date: 08/23/2024

Description:

	Current Balance	New Balance
<Checking Account ID> 1010000-00 Checking Account - 1st National	6294.34	276746.56
<Cash Account ID> 1100000-00 Undeposited Cash	320336.29	

	Post	Date	Cust ID	Last Name	<G/L Acct>	Amo
1	<input checked="" type="checkbox"/>	05/15	39873	Baker		400
2	<input checked="" type="checkbox"/>	05/20	andBa	Anderson		4070
3	<input checked="" type="checkbox"/>	05/22	andBa	Anderson		150
4	<input checked="" type="checkbox"/>	05/22	andBa	Anderson		150
5	<input checked="" type="checkbox"/>	06/06	cowBo	Cowail		119824
6	<input checked="" type="checkbox"/>	07/13				10000
7	<input checked="" type="checkbox"/>	07/13				93

Export

- To PDF
- To Excel
- To Excel 2007
- To Text
- To Tab Delimited

Filter

Use Date Range

Start: 08/23/2024

End: 08/23/2024

User: (All)

<Cash Back G/L> Less Cash Back: 0.00

Cash: 4795.19
 Checks and Other: 265657.03
 Deposit Total: 270452.22