

Exporting Contact and Loan data to Excel

WorkCenter gives you the ability to take your contact data and loan data and export these to an excel spreadsheet. The process is very simple and quickly accomplished. In this flash video, we will show you how to take contact data from the main WorkCenter screen and export it to Excel. We will also show you how to export reports, particularly loan data, from inside WorkCenter to an Excel spreadsheet.

Once this data is in an Excel format, it will be easy to email, print or further manipulate the data to meet your personal needs.

Here is how you will export main screen contact data to excel

Step #1: You will need to display the columns for your contact records by clicking on the “View Visible Fields” icon. Once the drop down menu appears, check the boxes you wish to show in the view for exporting to Excel. For this example, we will select the following column names: FileAs, Full Name, Email and home telephone number. Once these are selected, click out of the drop down menu box.

Step #2: Sort the view alphabetically by selecting one of the columns. For this example, we will click on the “Full Name” column heading and sort the data by using this column.

Step #3: You will now need to highlight the rows you wish to export to Excel. For this example, we will highlight all the contact records by selecting one contact and pressing the “Ctrl” key and then clicking on the letter “A” for all contacts. You will now notice that all the contacts have been highlighted.

Step #4: The final step is to select FILE, EXPORT and then choose EXCEL. WorkCenter will now open Excel on your computer and populate all the highlighted column data into the spreadsheet.

Once the data is in the Excel spreadsheet, you can arrange the column width and cell height. Save your spreadsheet to the appropriate computer folder while naming it.