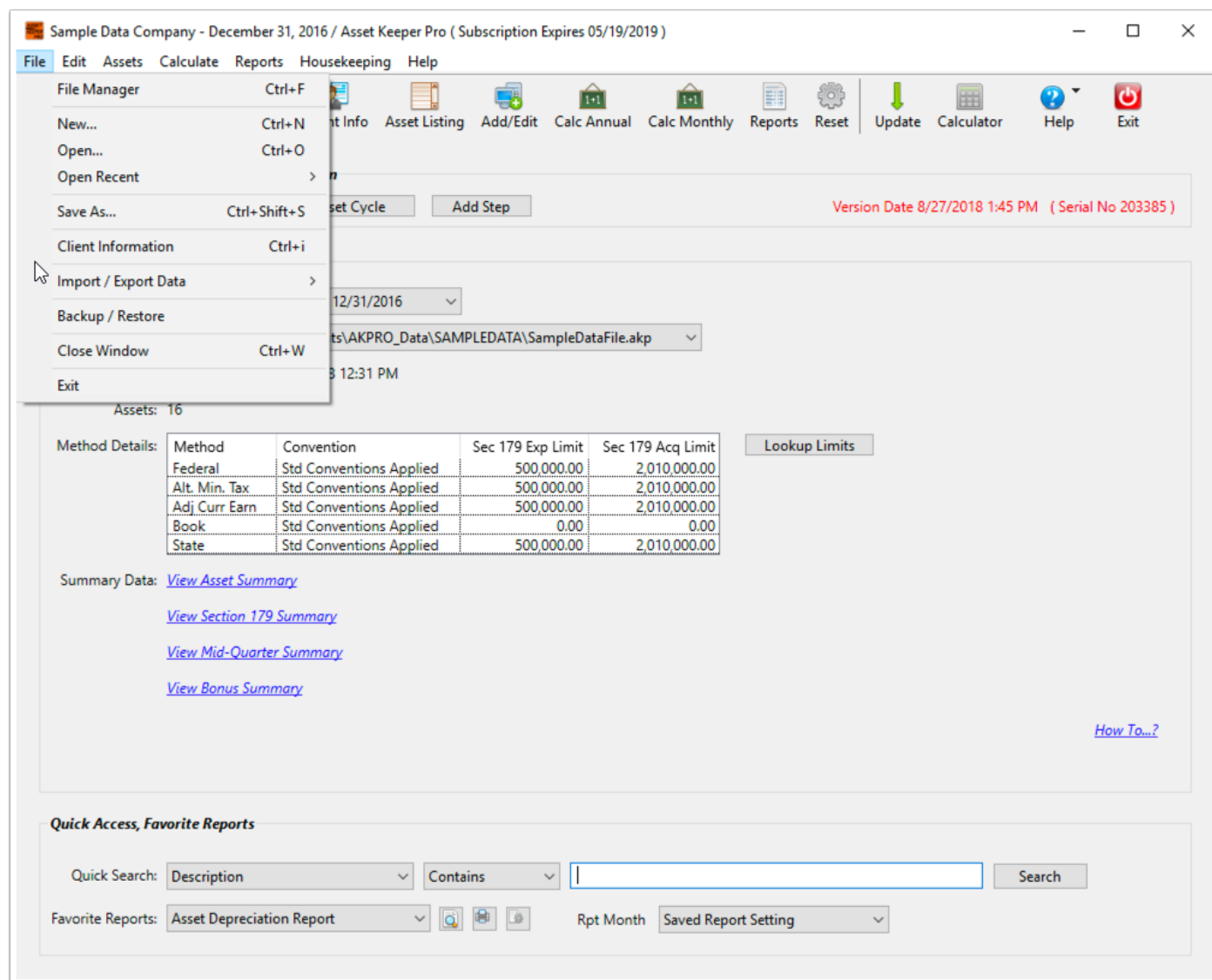## Export Data to Excel or CSV

Asset Keeper Pro gives you the ability to export data directly to Excel or CSV. To select this option go to the File menu under Import / Export Assets, select the Export to Excel or CSV option.

Export Data to Excel or CSV - Export Format

After selecting the Export option the Export Data screen appears.

Step 1 - Export Format - do you want to export to Excel or CSV. For Windows users, Excel is the best option. Mac users will select the CSV option.

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EXPORT DATA

Exporting asset data consists of four steps.
  1. Select the format that the exported data should be saved in.
  2. Select the data elements (fields) that you want exported.
  3. Select the assets that you want exported.
  4. Select the sort order for the exported data.

You can save your export settings so they can be restored at a later time to repeat the same export.

Step 1 - File Format   ⦿ Excel (256 col. max)   ○ CSV

Step 2 - Select Data   ⦿ Select fields?   Fields to Export   20 fields selected.
                                                          ☐ Do NOT include field headings in export file?

                          ○ Use Report Template?   Select Template

Step 3 - Select Assets   Select Assets   0 assets selected.   ☐ Select all assets?
                          ☐ Delete assets from file after exporting?

Step 4 - Sort Order   Asset A/C#   ∨   Primary sort   ☐ Do not sort data?

                          Asset A/C#   ∨   Secondary sort

Save Export   Restore Export   Advanced   How To...?   Export   Cancel

Export Data to Excel or CSV - Select Data

Step 2 - Select the Fields to Export by clicking that button.

This screen allows you to manually select the data fields you wish to export. You can check off individual fields or click the "check all" button toward the bottom in order to check all fields at once.

After selecting the data fields you want to include in the export, click the OK button.

Export Data to Excel or CSV - Select Assets

Step 3 allows you to select the assets you wish to export. Click the "Select Assets" button on the Export Data screen. Select the assets to be included for the export individually.

To make selecting the assets easier, you can use a filter to display only certain assets for selection. You can also use the "Select All" button to select all assets.

On the Export Data screen you will see a checkbox that allows you to delete assets from your file upon export. If you want to export to Excel and have the assets removed from your Asset Keeper file, you should check that box.

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Filter assets in grid based on   Show All Assets ⌄

Acquired	Asset A/C#	Description	Cost	Check to Export
07/12/2016	100	Book shelves	2,475.75	☐
07/08/2015	100	Table and 8 Chairs	4,250.00	☐
02/02/2015	100	20 office chairs	18,500.35	☐
02/02/2015	100	20 Bush desks	21,999.80	☐
07/12/2016	200	6 Canon Calculators	152.50	☐
02/15/2016	200	Apple MacBook Pro	2,300.00	☐
02/03/2016	200	HP Printer	750.25	☐
02/01/2016	200	Apple iPad - 10 inch	685.25	☐
12/01/2014	200	Dell computer	1,250.00	☐
02/03/2016	300	2015 GMC Truck	45,600.00	☐
02/16/2015	300	2013 Ford Focus	27,525.00	☐
02/02/2015	400	Front Office Remodel	75,678.50	☐
02/02/2015	500	Artwork	750.99	☐

Select All	Clear All	0	Number of assets selected for export	13 assets listed.

☐ Allow multiple row selection?   ⓘ   Close

Export Data to Excel or CSV - Sort Order

The 4th step on the Export Data screen is to select how you want your assets sorted on the Excel or CSV file. Click the drop-down arrow to change the sort order or click the box "do not sort data when exporting" if you do not want to use a sort order.

You can save your Export selections by clicking the "Save Export" button. You can then enter be able to give this export and name and if you ever want to use these same options in the future, you can select that particular export by clicking the "Restore Export" button.

You are now ready to export to Excel or CSV by clicking the "Export" button.

One more point about exporting - the "Advanced" button does give the option to export every data field in the Asset Keeper data file, but for the vast majority of Asset Keeper users this option is not necessary.