

Data entries in the fields of a selected group of customer records can be exported to an Excel spreadsheet for a variety of reasons such as a source file to be used for a large mailing, management reports, etc. Begin the procedure by making a screen search of the customers to be included in the spreadsheet file; audit the search results to verify that the qualifiers of the search yielded the desired segment of customers.

Click the “Wizards” icon down arrow, select “Export Contacts Wizard” to display the first screen:



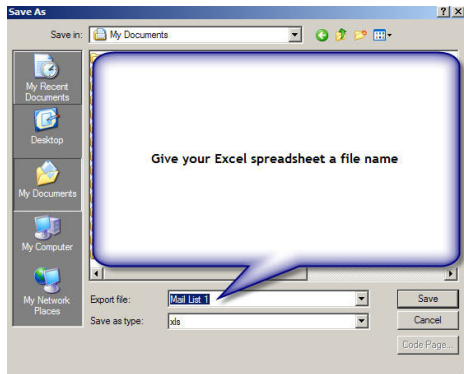
Click “Next” through this screen and the next screen until you reach Wizard screen #3; to select the export format.



Click the down arrow next to the selection field and select “Excel Selected .xls” from the menu. Click “Next” to proceed to the next Wizard screen.



Click the “Select Export File” icon to the left of the data field. Your computer directory navigation screen will appear with “Riata” displayed in the directory title field. Click the down arrow on the right of this display field and double click the “My Documents” folder.



Give your Excel spreadsheet a file name (export is the default name), click the “Save” button and the export Wizard screen will re-appear. Click the “Next” button on this screen to activate the export fields Wizard screen.



Double click the Riata data fields you want included in the spreadsheet. The double clicked field will appear in the right hand work area screen of the Wizard. Click the “Next” button to see a confirmation screen, click “Next” again to complete the export.



Click “OK” to close the export routine. Go to “My Documents” and open the new Excel spreadsheet. All Excel procedures and utilities are available to sort, edit and organize the data. Select your version of Excel when saving this spreadsheet after you have made any changes.