Exporting Records

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This guide explains how to export data from aACE to a spreadsheet format. It is intended for general users.

Exporting records can help you review data in spreadsheet format, retrieve data in aACE for use elsewhere, or reconcile discrepancies in your numbers.

FileMaker Cache Table

As with the <u>import process (https://aace6.knowledgeowl.com/help/importing-records</u>), exporting data uses temporary records in a FileMaker cache table. This approach helps with validating the data. First, any existing cache records are deleted for the user running the export. During the process, you might notice a dialog message about deleting records:

Delete									
Records remaining to delete:	130								

This message refers to the *cached files from the previous import* — actual business records are *never* deleted during an import.

After clearing the cache, the new records are cached. Then the cached data is transferred to an external file which is saved at the destination and in the format you specify. We recommend that you save exported data using either Excel or FileMaker spreadsheet formats. Other file formats will not retain the aACE field names for your data.

Export a Spreadsheet of Data

The export process is the same across all modules. This guide demonstrates the process using the Companies module:

- 1. Navigate from Main Menu to the desired module's list view.
- 2. Filter the list to show the records you want to export.
- 3. Click Actions > Export [Records].

• • •		Companies							<u>e</u>	
Record: 1 of 40						New 📲	Edk 🖉	Delete 🗶	Print 🖶	Actions
Companies										Send Notice Re: List
				NY					-	Activate Companies in List Deactivate Companies in List
Type	Company Name	Abbr	City	State / Prov	Postal Code	Phone	Sales Rep	Acct Mgr	Status	Deacuvate companies in List
> INTERNAL	aACME Education Solutions, Inc.	AI	New York	NY	10001	(555) 418-9777	JG	MH	ACTIVE	Update Type for Companies in List
> Vendor	aACEsoft	aACE	New York	NY	10016	(212) 532-1378			ACTIVE	Update Group for Companies in List Update Subgroup for Companies in List
> Vendor	Pewter Anderson Publishing	50004	New York	NY	10001	(555) 842-9461	MH	NW	ACTIVE	opuse subgroup to companies in con
> Vendor	McGullicuddy McGuire-Hall	50009	New York	NY	10018	(555) 212-3652	JS	КН	ACTIVE	Update Sales Rep for Companies in List Update Account Manager for Companies in List
> INTERNAL	John Smith	JS	West Babylon	NY	11704	(555) 418-9777	CN		ACTIVE	
> Vendor	Office Place	50016	New York	NY	10013	(212) 545-6954	JG		ACTIVE	Update Parent Company for Companies in List
> INTERNAL	Educause Marketing	50018	New York	NY	10001	(212) 532-1234	CN		ACTIVE	Update Referral Company for Companies in Lis
> Vendor	American Express	AMEX	New York	NY	10116		CN		ACTIVE	Update Rate Card for Companies in List Update Tax Profile for Companies in List Update Sales Territory for Companies in List
> Vendor	Macmillan Macbeth-Corridor	50033	New York	NY	10018	555-256-3212	JG		ACTIVE	
> Customer / Vendor	Annamac Meadows Publishing	AMP	New York	NY	10018	555-263-2563	JG		ACTIVE	
> Vendor	Aperture Technologies	50035	New York	NY	10015	(646) 729-2525	JG		ACTIVE	Add Activity to Companies in List
> INTERNAL	Mara Harvey	мн	New York	NY	10001	(555) 418-9777	CN		ACTIVE	Create Leads for Companies in List
> INTERNAL	Caitlin Nascher	50040	Brooklyn	NY	11209		CN		ACTIVE	Remove Companies in Found Set from List
> Vendor	ConEd	50043	New York	NY	10009		JG		ACTIVE	
> INTERNAL	Mara Harvey	MH-aACME	New York	NY	10001	(555) 418-9777	CN		ACTIVE	Import Important Dates
> Customer	New York Learning Co	NYLC	Brooklyn	NY	11238		JG	мн	ACTIVE	Import Companies
> Customer	Queens County School District	50088	Astoria	NY	11105	(212) 555-0874	JG	мн	ACTIVE	Export Companies
> Customer	Penn Harris Madison	50091	Tarrytown	NY	10591		JG	мн	ACTIVE	
> INTERNAL	Brian Voll	BV	Woodside	NY	11377	(555) 418-9777	MH		ACTIVE	- *
> INTERNAL	Allen Wright	AW	New York	NY	10028	(555) 418-9777	мн		ACTIVE	• * -
> Vendor	Office Supply Depot	OSD	Brooklyn	NY	11221		мн		ACTIVE	• * -
> INTERNAL	Michael J Bethuy	MJB	New York	NY	10028	(555) 418-9777	мн		ACTIVE	• # -
> INTERNAL	Jamie Gianelli	JG	Brooklyn	NY	11218	(555) 418-9777	MH		ACTIVE	•
Show All Find my	Companies Find Companies with x Sale	es Volume Fin	d Companies with x Dis	hursement Volume	Related Records					0

- 4. At the confirmation dialog, click **Export**.
- 5. Use your OS dialogs to specify the exported file's name, save destination, and format. Note: We recommend using Excel format for all exporting and importing.

In addition to business data, you can also <u>export record logs</u> (https://aace6.knowledgeowl.com/help/searchingand-exporting-record-logs) that track system events.