

Exporting Records

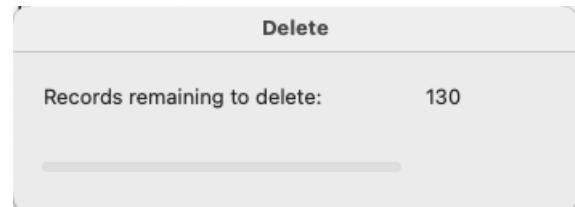
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This guide explains how to export data from aACE to a spreadsheet format. It is intended for general users.

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

Understanding the FileMaker Cache Table

Similarly to the [import process](https://aace6.knowledgeowl.com/help/importing-records) (<https://aace6.knowledgeowl.com/help/importing-records>), exporting data uses temporary records in a FileMaker cache table. This approach helps validate 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:



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.

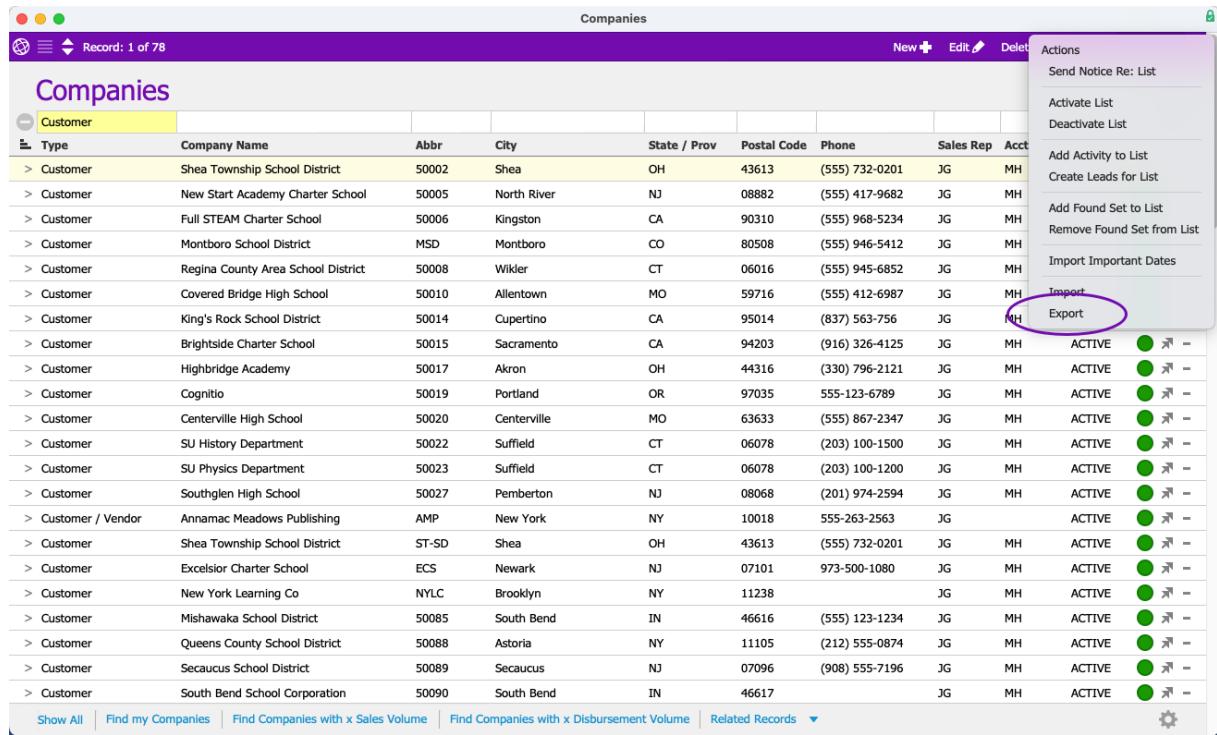
Exporting a Spreadsheet of Data

The export process is available in all modules. This example demonstrates the process using the Companies module:

1. From the Main Menu, go to the module list view.
2. Use the [Quick Search bar](https://aace6.knowledgeowl.com/help/using-aaces-quick-search-features) (<https://aace6.knowledgeowl.com/help/using-aaces-quick-search-features>) and [sorting features](https://aace6.knowledgeowl.com/help/sorting-records-in-the-list-view) (<https://aace6.knowledgeowl.com/help/sorting-records-in-the-list-view>) to compile the records you want

to export.

3. Select Actions > Export.



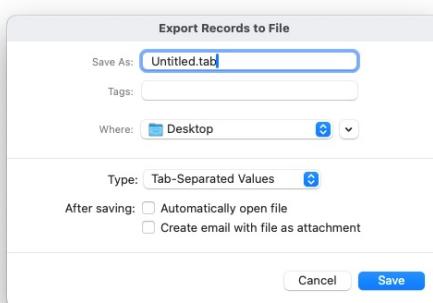
The screenshot shows a list of companies with columns for Type, Company Name, Abbr, City, State / Prov, Postal Code, Phone, Sales Rep, and Acct. The 'Actions' menu on the right includes options for 'Import' and 'Export', with 'Export' being highlighted.

Type	Company Name	Abbr	City	State / Prov	Postal Code	Phone	Sales Rep	Acct
> Customer	Shea Township School District	50002	Shea	OH	43613	(555) 732-0201	JG	MH
> Customer	New Start Academy Charter School	50005	North River	NJ	08882	(555) 417-9682	JG	MH
> Customer	Full STEAM Charter School	50006	Kingston	CA	90310	(555) 968-5234	JG	MH
> Customer	Montboro School District	MSD	Montboro	CO	80508	(555) 946-5412	JG	MH
> Customer	Regina County Area School District	50008	Wikler	CT	06016	(555) 945-6852	JG	MH
> Customer	Covered Bridge High School	50010	Allentown	MO	59716	(555) 412-6987	JG	MH
> Customer	King's Rock School District	50014	Cupertino	CA	95014	(837) 563-756	JG	MH
> Customer	Brightside Charter School	50015	Sacramento	CA	94203	(916) 326-4125	JG	MH
> Customer	Highbridge Academy	50017	Akron	OH	44316	(330) 796-2121	JG	MH
> Customer	Cognito	50019	Portland	OR	97035	555-123-6789	JG	MH
> Customer	Centerville High School	50020	Centerville	MO	63633	(555) 867-2347	JG	MH
> Customer	SU History Department	50022	Suffield	CT	06078	(203) 100-1500	JG	MH
> Customer	SU Physics Department	50023	Suffield	CT	06078	(203) 100-1200	JG	MH
> Customer	Southglenn High School	50027	Pemberton	NJ	08068	(201) 974-2594	JG	MH
> Customer / Vendor	Annamac Meadows Publishing	AMP	New York	NY	10018	555-263-2563	JG	ACTIVE
> Customer	Shea Township School District	ST-SD	Shea	OH	43613	(555) 732-0201	JG	MH
> Customer	Excelsior Charter School	ECS	Newark	NJ	07101	973-500-1080	JG	MH
> Customer	New York Learning Co	NYLC	Brooklyn	NY	11238		JG	MH
> Customer	Mishawaka School District	50085	South Bend	IN	46616	(555) 123-1234	JG	MH
> Customer	Queens County School District	50088	Astoria	NY	11105	(212) 555-0874	JG	MH
> Customer	Secaucus School District	50089	Secaucus	NJ	07096	(908) 555-7196	JG	MH
> Customer	South Bend School Corporation	50090	South Bend	IN	46617		JG	MH

4. Select Export.

- Enter the Save As file name and select the download location. Then, choose the format of the export.

We recommend using Excel format for all exporting and importing.



The dialog box is titled 'Export Records to File'. It has fields for 'Save As' (Untitled.tab), 'Where' (Desktop), and 'Type' (Tab-Separated Values). There are also checkboxes for 'Automatically open file' and 'Create email with file as attachment'.

In addition to business data, you can also [export record logs](https://aace6.knowledgeowl.com/help/searching-) (<https://aace6.knowledgeowl.com/help/searching->

[and-exporting-record-logs](#)) that track system events.

Using the Admin Export

The Admin Export allows unrestricted access to data within aACE. This action exports data not visible to users without regard to access privileges. If you are importing data back into aACE, use the Export feature.

In the module list view, select Admin Actions icon () > Admin Export and follow the prompts.

