

The logo features a dark grey vertical bar on the left side of the page. To its right, the word "SmartOffice" is written vertically. "Smart" is in a bold, black, sans-serif font, while "Office" is in a white, outlined, sans-serif font. A registered trademark symbol (®) is located at the top right of the "Office" text.

SmartOffice[®]



Dynamic Report with Excel Template User Guide

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Introduction

Excel Export is a tool used to export data from Dynamic Reports to an Excel template for the purpose of further manipulating data.

Excel Template

The Excel template must be uploaded to the office. Select **Excel Templates** from the **Reporting/Marketing** expanded list to access the Search Excel Template dialog box. Click **Search** to display the Excel Template Summary. Click **Add** to open the Excel Template Detail dialog box. Enter a Description, click **Browse** to designate the Local File Path of the Excel template and then click **OK**. Note that if any changes are made to the Excel template, the template must be reloaded into the Office.

The screenshot shows a web-based dialog box titled "SmartOffice -- Web Page Dialog". It contains three main sections:

- Excel Template Detail:** Includes a "Description" text input field and a "Keyword" text input field with a dropdown arrow and a "C" icon.
- Custom Template Creation:** Contains three numbered steps:
 - Step 1: Create a sample template by exporting the column headings from the reports by clicking the Export Headings button. Modify the column order as necessary.
 - Step 2: Save the sample Template as an .XLT file.
 - Step 3: Skip step 2 if you have already created an .XLTA button labeled "Export Headings" is positioned below the steps.
- Upload Template:** Features a "Local File Path" text input field and a "Browse..." button.

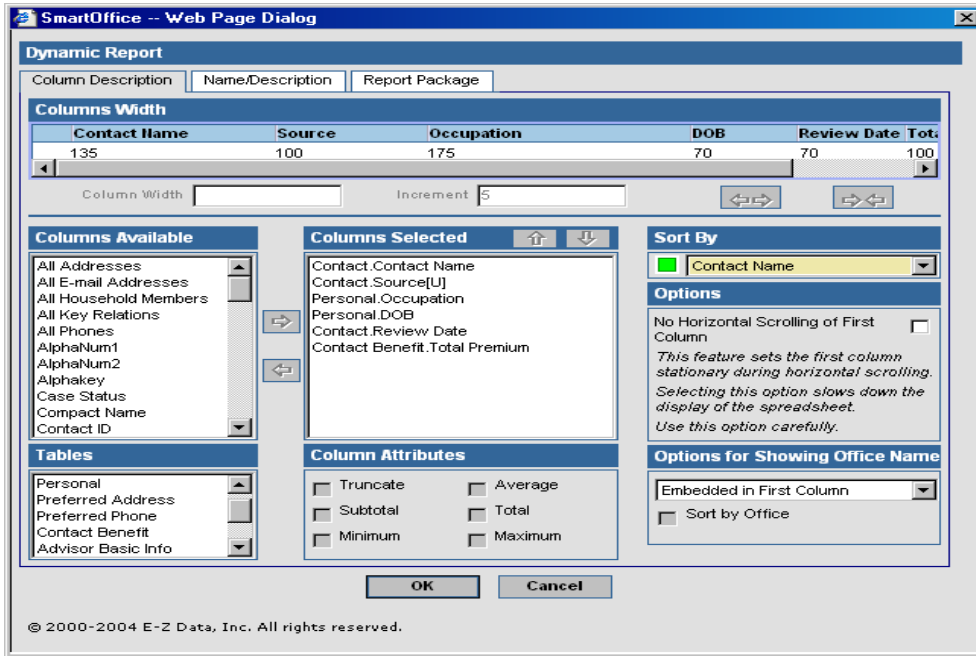
At the bottom of the dialog are "OK" and "Cancel" buttons, and a copyright notice: "© 2000-2004 E-Z Data, Inc. All rights reserved."

Dynamic Report with Excel Template

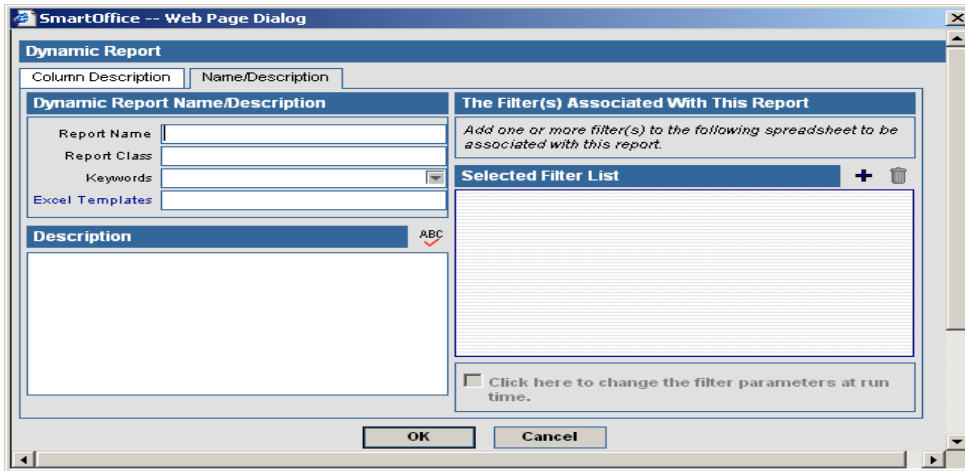
Select **Dynamic Reports** from the **Reporting/Marketing** expanded menu.

- Reporting/Marketing
 - Dynamic Reports
 - Mass Correspondence
 - Marketing Campaign
 - Excel Templates
 - Crystal Reports Packaging


In the **Search Dynamic Reports** dialog box, click **Search** to display the Dynamic Report Summary. Click **Add** to open the Category dialog box. Select the applicable Category and then click **OK**. Make certain that the columns that you select exactly match the columns in the uploaded Excel template.

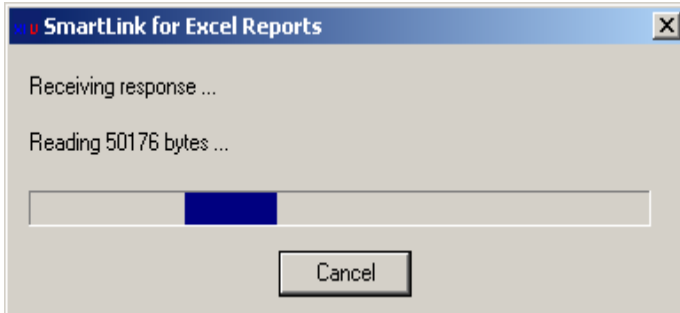


After selecting the appropriate columns, click the **Name/Description** tab. Enter in a Report Name and then click the **Excel Templates** hyperlink to open the Search Excel Template dialog box. Click **Search** and then select the appropriate template from the Excel Template Summary. Filters and Sets can be added to the report from this dialog box. Click **OK** to save the Dynamic Report with Excel Template.



Export Contents to External Application

From the Dynamic Report Summary, tag the newly created report and then click the **Export Contents to External Application** button . The Smart Link for Excel Reports process dialog box displays.



After processing, the Microsoft Excel template spreadsheet displays.

Macros

Before viewing the information, click the following button to run the macro. This will process the calculation needed to display the information. This is a necessary step for the data to show correctly.

Analyze Data

Worksheet Description

Data This worksheet contains data exported from SmartOffice. We recommend making a copy of this worksheet before making any changes.	State Displays the address information by state.
Country Displays the address information by country.	Zip Displays the address information by zip.
City Displays the address information by city.	

Using PivotTables

1. If the PivotTables are not displayed, right-click in the grey area.
2. Select PivotTable.
3. Click the exclamation symbol (a refresh button) to refresh the data. The data must be refreshed each time the report is run.
4. If familiar with PivotTables, modify the existing table or create another.

SmartOffice Dynamic Report Requirements

When created the dynamic report, these columns must be used in the following orders.

Category: Contact - Individual

Column:
Contact.Contact Name
Personal.DOB
Contact.Review Date