# Asset Keeper Pro - File menu / Export Data to Excel or CSV

## 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.

🚟 ABC Computer Consul	tants, LLC - December 3	31, 2013 / Asset Keeper	Pro ( Subscri	iption Expires	; 12/31/2014 )					Į	- 0 X
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## **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.

🚟 ABC Computer Consultants, LLO	C - December 31, 2013 - Export Assets	
File Edit Help		
EXPORT DATA Exporting asset data consists 1. Select the format that th 2. Select the data elements 3. Select the assets that you 4. Select the sort order for You can save your export set	of four steps. e exported data should be saved in. ( fields ) that you want exported. u want exported. the exported data.	
Step 1 - Export Format	Excel (Windows only) CSV (Windows or Mac)	
Step 2 - Select Data	<ul> <li>Select fields?</li> <li>Fields to Export</li> <li>20 fields selected.</li> <li>Do NOT include field headings in export file?</li> </ul>	
	Use Report Template?     Select Template	
Step 3 - Select Assets	Select Assets     0 assets selected.       Delete assets from file after exporting?	Select all assets?
Step 4 - Sort Order	Asset A/C#  Primary sort  Do not sort data?  Asset A/C#  Secondary sort	
Save Export Res	tore Export Advanced <u>How To?</u> Expo	ort 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.

Edit Help			
Depreciation Data	Annual Depreciation		
Depreciation Methods	All Methods	1ethod	Ŧ
Table	Field Name	Required	Include?
Assets Data	Asset A/C#	Optional	
Assets Data	Expense A/C#	Optional	
Assets Data	Accum Depr A/C#	Optional	
Assets Data	County	Optional	
Assets Data	Department	Optional	
Assets Data	Sort Code #3	Optional	
Assets Data	Sort Code #4	Optional	
Assets Data	Sort Code #5	Optional	
Assets Data	Sort Code #6	Optional	
Assets Data	Sort Code #7	Optional	
Assets Data	Sort Code #8	Optional	
Assets Data	Date Acquired	Optional	$\checkmark$
Assets Data	Description #1	Optional	V
Assets Data	New property	Optional	$\checkmark$
Assets Data	Date Sold	Optional	
Assets Data	Selling Price	Optional	
Assets Data	Selling Expense	Optional	
Assets Data	Status	Optional	<b>v</b>
Assets Data	Year of Depr	Optional	
Assets Data	Valuation	Optional	
Assets Data	Transfer 1 Months	Optional	
Assets Data	Transfer 1 Cost Center	Optional	
Assets Data	Transfer 2 Months	Optional	
Assets Data	Transfer 2 Cost Center	Optional	
	118 fields listed 20 fields se	lected	

#### **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.

鱰 ABC Computer	Consultants, LLC - Dec	cember 31, 2013 - Select Assets		
File Edit Help				
Filter as	sets in grid based on S	how All Assets		
Acquired	Asset A/C#	Description	Cost	Check to Export
01/01/2004 06/01/1996 01/01/2004 02/01/1996 04/30/2008 07/01/2007 12/31/2009 06/01/2006 06/01/2004 12/31/2009 06/15/2004 06/01/1997 06/01/1997	100 100 110 120 120 130 130 130 140 140 140	Land - 6835 South 173 Street Land - 2212 South 132 Street Building - 6835 South 173 Street Building - 2212 South 132 Street GMC Envoy 2008 2004 Lexus RX330 [LKA00001] Acquired Asset Description? Conference Table 5 Computer Desks 3 desks / 5 chairs [LKA00002] Acquired Asset Description? 3 Compaq Laptops nc6000 1-Thinkpad computer HP Laserjet Printer	135,000.00 125,000.00 968,000.00 875,125.00 31,500.00 42,655.65 1,731.78 1,198.00 7,875.00 14,500.00 0,00 7,628.00 2,575.00 1,450.00	
Selec	t All	Clear All 0 Number of assets selected for export		14 assets listed.
Allow multi	ple 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 exporting every data field in the Asset Keeper data file, but for the vast majority of Asset Keeper users this option is not necessary.

🚆 ABC Computer Consultants, LL	C - December 31, 2013 - Export A	ssets
File Edit Help		
EXPORT DATA		
Exporting asset data consists 1. Select the format that th 2. Select the data element 3. Select the assets that yo 4. Select the sort order for	s of four steps. ne exported data should be saved in s ( fields ) that you want exported. u want exported. the exported data.	n.
You can save your export set	tings so they can be restored at a l	ater time to repeat the same export.
Step 1 - Export Format	Excel ( Windows only )	○ CSV ( Windows or Mac )
Step 2 - Select Data	Select fields?	Fields to Export       20 fields selected.         Do NOT include field headings in export file?
	O Use Report Template?	Select Template
Step 3 - Select Assets	Select Assets Delete assets from file after	3 assets selected.  Select all assets? r exporting?
Step 4 - Sort Order	Asset A/C#  ▼ Asset A/C#	Primary sort Do not sort data? Secondary sort
Save Export Res	tore Export	Advanced <u>How To?</u> Export Cancel