

SALES STUDIO CONFIGURATION

EXPORT SALES PACKAGE DATA

The **Export** feature allows you to download your Sales Packages list view as a Microsoft Excel (.xlsx) file. This will enable you to utilise the full extent of all available **Excel** tools with reference to your data.

Excel is particularly useful for organising and analysing sales data and creating graphs and charts from this data (easier to examine than rows of information), as well as forecasting predictions.

If your company is migrating to a new software application, it is important that all the data from the old system is transferred correctly into the new one. This data will need to be put in a 'universal' format recognised by most applications e.g. **Excel**. The data can be exported to Excel and then imported to the new system.

Ribbon Access: *Sales Studio > Configuration > Sales Packages*

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1. The **Sales Packages** listing screen will open.
2. Here you can view all the Sales Packages on the system.
3. Click on the **Export** button.

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1. **Excel** will automatically open.
2. Your selected data will be reflected in the open spreadsheet.
3. You can now utilise Excel's **functionalities** to analyse your data.

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