



## Sage 100 ERP Tips and Tricks:

## Exporting Data from Sage100 to Excel (MAS90/200)

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Almost every report in Sage100 is now Crystal Reports-based. Between reports and look-ups it is becoming easier to export data directly into Excel.

Any Crystal report can be exported to Excel. To export data from a Crystal Report directly to Excel, select a report and PREVIEW it. Once open click the first icon on the top right.

Ser Customer Listing	Transfer and the second second second		×
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Main Report			
	Customer Listing Sorted by Customer Number Active Customers Only	ABC Company (ABC)	
	Customer Number/ Name: 01-ABF American Business Futures		=
1	Address 2131 N. 14th Street Suite 100 Accounting Department Citic Milvaukee	Sont: AMER Open Item Customer: Yes Customer Status: Active	
	State: WI ZIP Code: 53205-1204 Country: USA United States Residential Address: No		
	Primary Contact ARIIEJUHN ArtieJohnson Telephone (414) 555-4787 Extension: 219 Fax: Batch Fax: No E-mail Address: artie@sage.sample.com URI Address: www.abi.com	Price Level: 1 Default Payment Type: NONE	
	Terms Code: 01 Net 30 Days Salesperson: 0200 Shelly Westland Ship Code: UPS BLUE	Discount Rate: 0.000% Finance Charge Rate: 1.500% Customer Type: A2	
	Tax Schedule: Wi MILMIL Mitwaukee Comment: Call Ed for credit approval.	Print Dunning Message: Yes Use Sage Data Cloud No for Invoice Printing:	
	Item Code: WIDGET Item Code Description: 8" x 10" Widgets	Credit Hold: No Credit Limit: 120,000.00	
	Customer Number/ Name: 01-AVNET Avnet Processing Corp	a	-
Current Page No.: 1	Total Page No.: 1+	Zoom Factor: 100%	

Using the drop-down listing, select Excel. If you want to easily edit immediately after exporting, select Application, Disk will save the file to your computer. You'll then be prompted to select some options related to exporting the data.

Export	×
Format:	
Microsoft Excel (97-2003)	ОК
Destination:	Cancel
Disk	
Description	
Disk file exports the report in the specified format to a specified	disk.





Once you've selected your options and click OK, Excel will open and the data from the report will be available to be edited or reformatted. Sometime the formatting from Crystal Reports is not exact when translating to Excel.

You might encounter some blank lines that you might not normally expect. This is due to the translation between Crystal and Excel, try "Excel – Data only" if this is the case.

You can export lookup list information from Sage 100 ERP to Excel as well. Whatever information is being shown in the view will be exported to Excel. Click on the Excel button at the bottom right.

Once the data is in Excel, it can be manipulated however the user sees fit.

The ability to export data makes it easy to extract data in the form of a report without having to spend hours creating custom reports to retrieve this information.





For more information or assistance with modifying the lookup window in Sage 100 ERP (MAS 90/200), contact us now at **info@llbgroup.com** or **267.457.4700**.

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