



Export Order Records

Jennifer S - 2022-01-17 - Orders

The first step to exporting order information is to choose the order(s) you would like to export. Data can be exported individually, selected, or all at once. To do select a single order, use the checkbox to the left of the order number in the Quotes, Orders, Invoices, or Sample Requests tabs.

Use the checkbox at the top to select all the orders currently shown. Using this option will display a message asking if you would like to select all records. If you would like to select all records, click on the link in the message.

Orders

Dashboard Quotes **Orders** Invoices Sample Requests Purchase Order History

Q Search by product, supplier, etc.

<input type="checkbox"/>	Order # ⇅	Customer ⇅	Date ▾	In-Hands Date ⇅	Total ⇅	Status ⇅	
<input type="checkbox"/>	ASI-455564	Jan ABC Company	1/14/22	1/28/22	\$627.52	Closed	▾
<input type="checkbox"/>	ASI-455563	Red Crossing	1/7/22		\$957.82	Open	▾
<input type="checkbox"/>	ASI-455562	Red Crossing	12/29/21		\$957.82	Closed	▾
<input type="checkbox"/>	ASI-455561	ASI	12/20/21		\$3,512.72	Open	▾
<input type="checkbox"/>	ASI-455560	General Medical Center	12/16/21		\$196.37	Open	▾

After the desired order(s) have been selected, click on the Export button to choose if you would like to export to ProfitMaker or Excel. ProfitMaker will export as a .XML file and Excel will export as a .XSLX file.

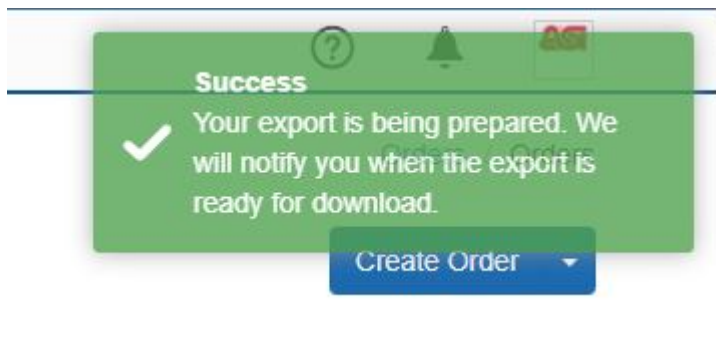
Dashboard Quotes Orders **Invoices** Sample Requests Purchase Order History

Q Search by product, supplier, etc. **Status ▾** **Export ▾**

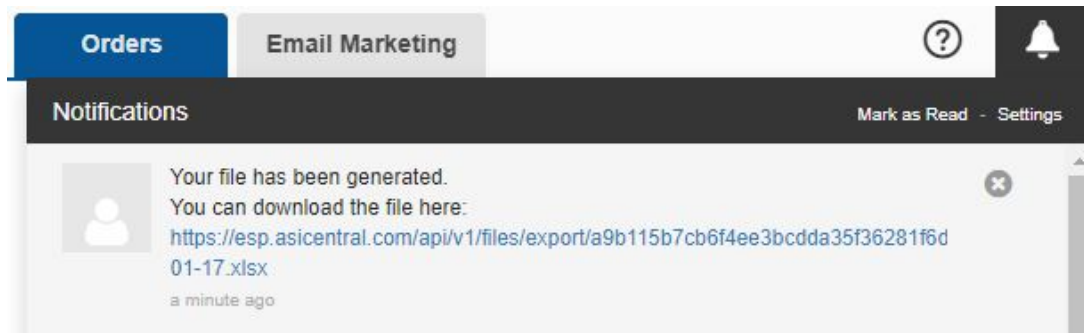
All 10 records on **Select all 228 records**

- ProfitMaker
- Excel

You will see a "Success" notification in the upper right corner of ESP.



A notification will appear when the file is ready for use.



Click on the file link to download it onto your computer for further use.