

The **SRVAlync** Universal Data Export Utility (DataXprt®)

Overview

Want to use your **SRVAlync** data in other applications? Then, make use of our **Universal Data Export Utility**.

The **Data Export Utility** allows the exporting of **SRVAlync** data to files that may be used by "external" programs such as MS Word (with mail merge) for use in creating customer correspondence (letters, holiday cards, etc.), for creating customized certification letters or quotes, for input to other programs (such as MS Excel) for special listings, analysis and/or charting, for input to general accounting programs, databases, etc. ***The utility comes with a complete on-line Windows-type help system.***

The **Universal Data Export Module** may export data related to any or all of your

- Clients/Contacts data
- Jobs and/or Tasks data
- Invoices/Receivables data
- Expenses data
- Quotes data

Uses for the Exported Data

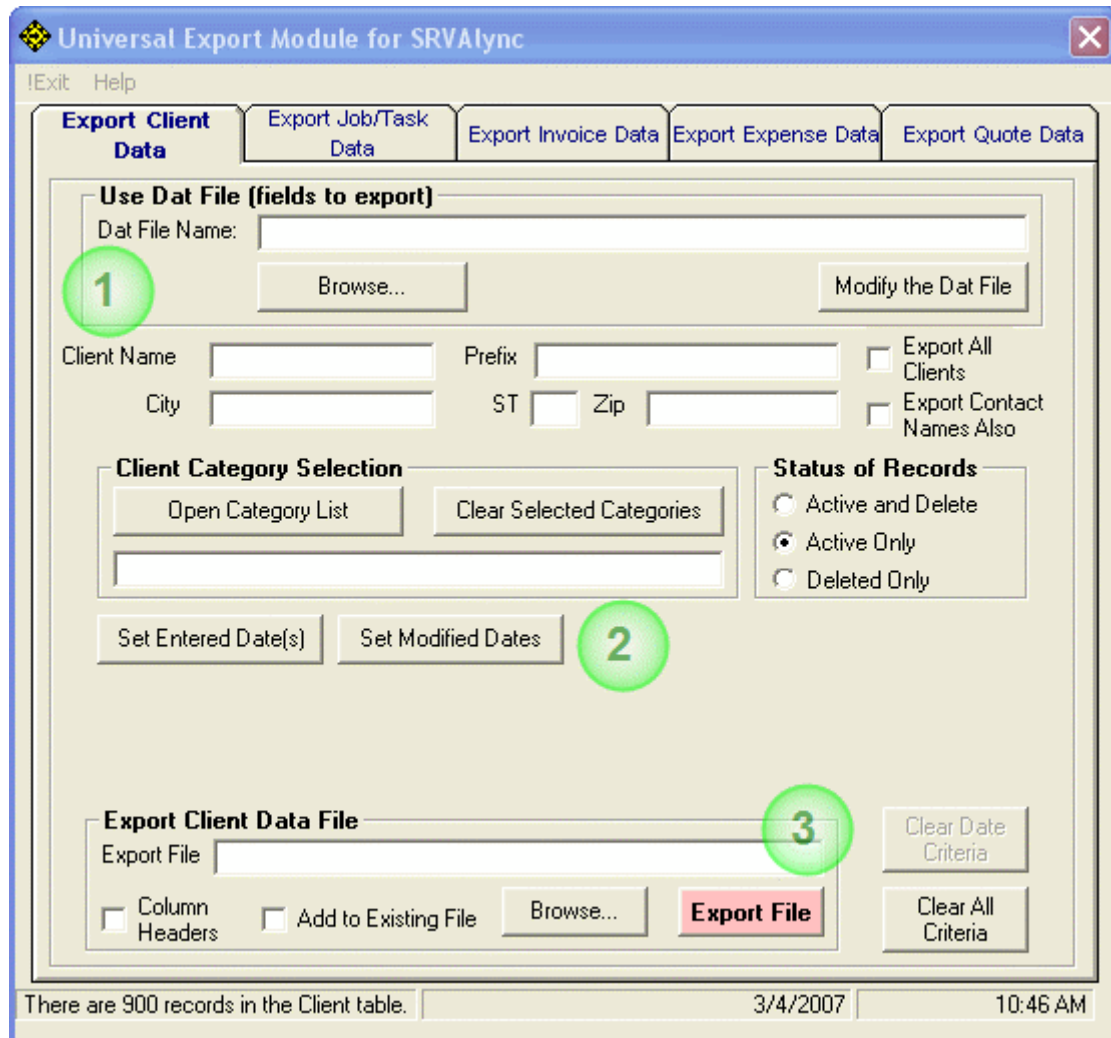
The exported data may be used for many purposes, for example:

- To create Excel files
- As a Mail Merge data file for word processors to create custom letters, forms, reports, etc.
- As an input file for other databases such as Access
- As an input file for third party report programs

See the section at the end of this document entitled "**The Export File**" for an illustration of an export file.

The Search Criteria Screen

The Search Criteria Form Screen is shown below. Each “tab” opens the search criteria screen appropriate to that export function. The screen illustrated shows the “Client/Contact” export screen:



Each “ tab” form has three common sections—

Common Areas on all “Tab” Forms	
1	This area calls out the external file that lists the fields to be exported. This allows the use of multiple field export configurations for various purposes if desired. You may easily modify the specific fields to be exported.
2	Record search criteria are entered in this area to allow you to customize what records are to be exported. This area is different for each search “Tab”
3	You designate the name of the data file to be exported here.

Illustration of the screen used to export Job/Task information.

The “Job/Task export screen” allows you to export Job or Task information or both. You may use either Job No, Task No. or Client criteria to export records. You may select all or specific Task Types, select according to status or select according to Entered or Modified dates.

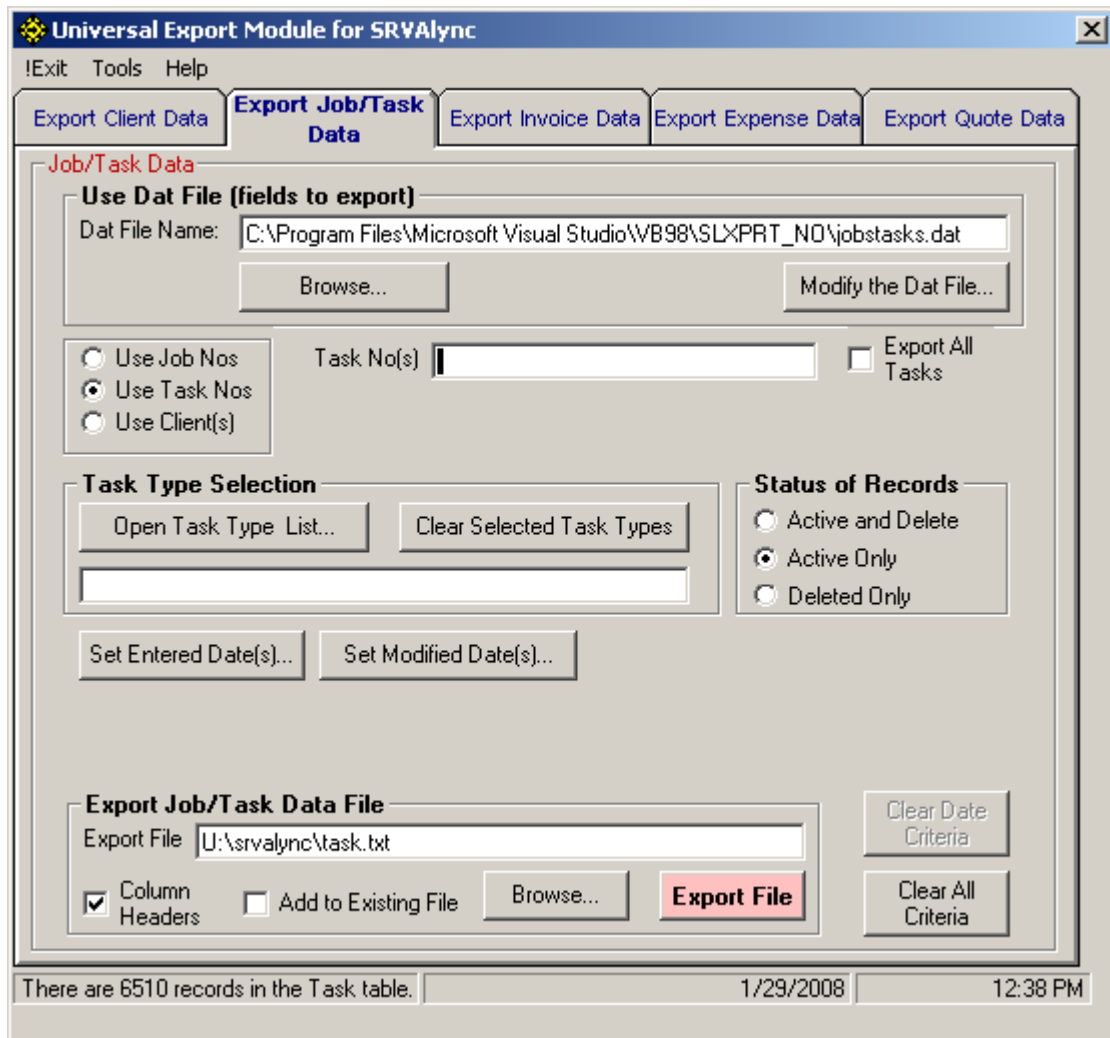


Illustration of the screen used to export Invoice information.

The “invoice export screen” allows you to use either Invoice No. or Client criteria to export records along with balance, date and status criteria.

Universal Export Module for SRVALync

!Exit Help

Export Client Data Export Job/Task Data **Export Invoice Data** Export Expense Data Export Quote Data

Invoice Data

Use Dat File (fields to export)

Dat File Name: C:\Program Files\Microsoft Visual Studio\WB98\SLXPRT_NO\invoices.dat

Browse... Modify the Dat File...

Use Invoice No(s) Invoice No(s) Export All Invoices

Use Client(s) Export Related Transactions

Invoice Balance **Dated/Not Yet Dated** **Status of Records**

Only Invoices with a balance Undated Invoices Active and Delete

Only zero balance Invoices Dated Invoices Active Only

All Invoices Both Deleted Only

Set Invoice Date(s)...

Export Invoice Data File

Export File U:\srvalync\invoice.txt

Column Headers Add to Existing File Browse... **Export File** Clear Date Criteria

Clear All Criteria

There are 10033 records in the Invoice table. 3/21/2007 12:59 PM

Illustration of the form used to export expense data

The “expense export screen” allows you to export expenses based on Tasks, Clients or Employees as well as status and date(s).

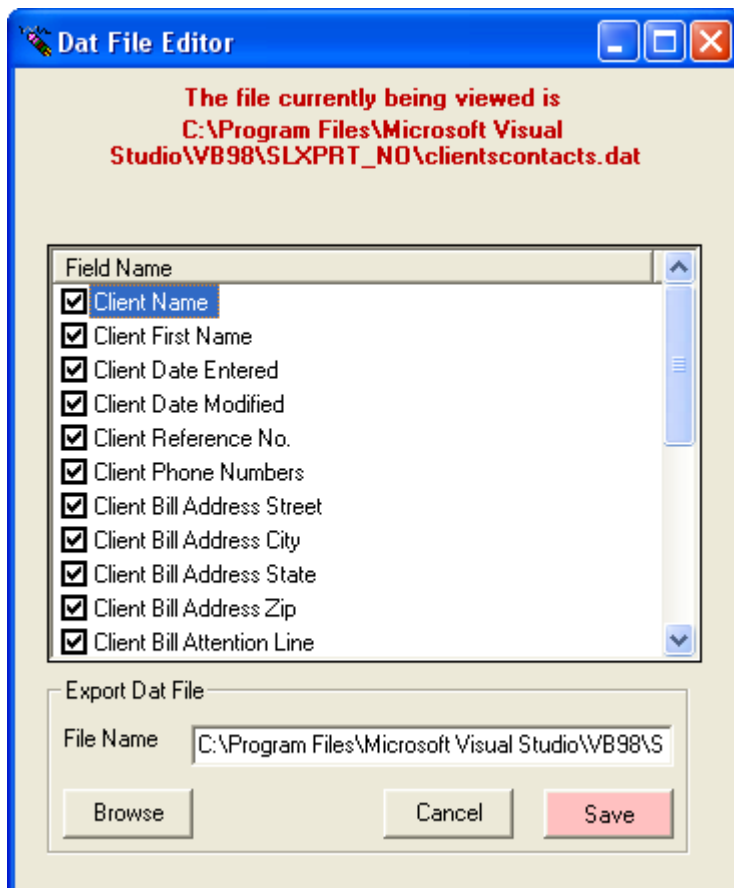
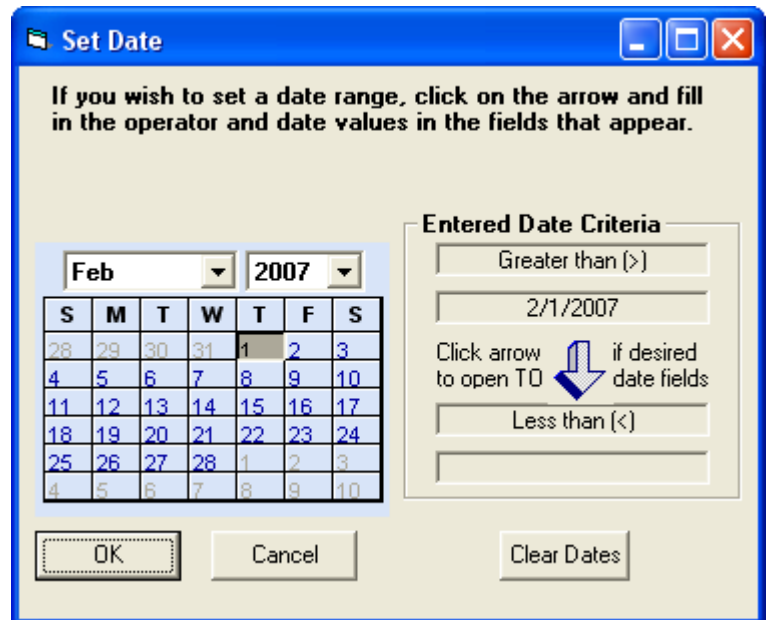
The screenshot displays the 'Universal Export Module for SRVALync' window. The title bar includes a logo, the text 'Universal Export Module for SRVALync', and a close button. Below the title bar is a menu bar with '!Exit' and 'Help'. A tabbed interface is present with five tabs: 'Export Client Data', 'Export Job/Task Data', 'Export Invoice Data', 'Export Expense Data' (which is selected and highlighted in blue), and 'Export Quote Data'. The main content area is titled 'Expense Data' and contains several sections:

- Use Dat File (fields to export):** A text field for 'Dat File Name' containing 'C:\Program Files\Microsoft Visual Studio\WB98\SLXPRT_NO\expenses.dat'. Below it are 'Browse...' and 'Modify the Dat File...' buttons.
- Selection Criteria:** Three radio buttons: 'Use Task No(s)' (selected), 'Use Client(s)', and 'Use Employee(s)'. To the right is a 'Task No(s)' text field and an 'Export All Expenses' checkbox.
- Status of Records:** Three radio buttons: 'Active and Delete', 'Active Only' (selected), and 'Deleted Only'.
- Set Expense Date(s):** A button for selecting dates.
- Export Expense Data File:** A text field for 'Export File' containing 'U:\srvalync\expense.txt'. To its right are 'Clear Date Criteria' and 'Clear All Criteria' buttons. Below the text field are checkboxes for 'Column Headers' (checked) and 'Add to Existing File' (unchecked), along with a 'Browse...' button and a prominent red 'Export File' button.

At the bottom of the window, a status bar shows: 'There are 17693 records in the Expenses table.', '3/21/2007', and '1:00 PM'.

Simple to Use

In addition to a full help system, the module comes with many features to help you to configure just what you wish to export. The **Set Date** screen is shown at the right.



At the left is an example of the form used to modify the fields to be exported.

The names shown are the names used in the export file. They show up in programs such as Microsoft Excel, Word mail merge, Access and many other "external" applications.

You may not only designate what fields to export, but you may also rename the fields to suit your particular requirements.

The Export File

In a Tab-delimited file such as is created by this module, each data record is represented by a single line terminated by carriage return and linefeed characters (newline). The first line may contain the field title names (depending on what you have designated on the **Search Criteria Screen**). The field title information is used by many applications (e.g., Word Mail Merge, Excel, Access). All subsequent lines contain record data with field data items surrounded by double quotes and separated by a TAB character, for example:

Example column name line:

Client Name[tab]Client Prefix[tab]Client Address[tab]Client City[tab]Client State[tab]Client Zip[tab]Client Date Entered(linefeed)

Example data line:

"DAN'S DEVELOPMENT CORP."[tab]""[tab]"15870 CLYDE ST."[tab]"ALLEN PARK"[tab]"MI"[tab]"48101"[tab]
"6/29/1995"(linefeed)

"DARKMAN CONSTRUCTION INC."[tab]""[tab]"45000 WINDSTORM AVE."[tab]"NOVI"[tab]"MI"[tab]"48375"[tab]
"6/29/1994"(linefeed)

(The words **linefeed** and **[tab]** only show where these characters are placed in the data file. They don't appear in the file.)