

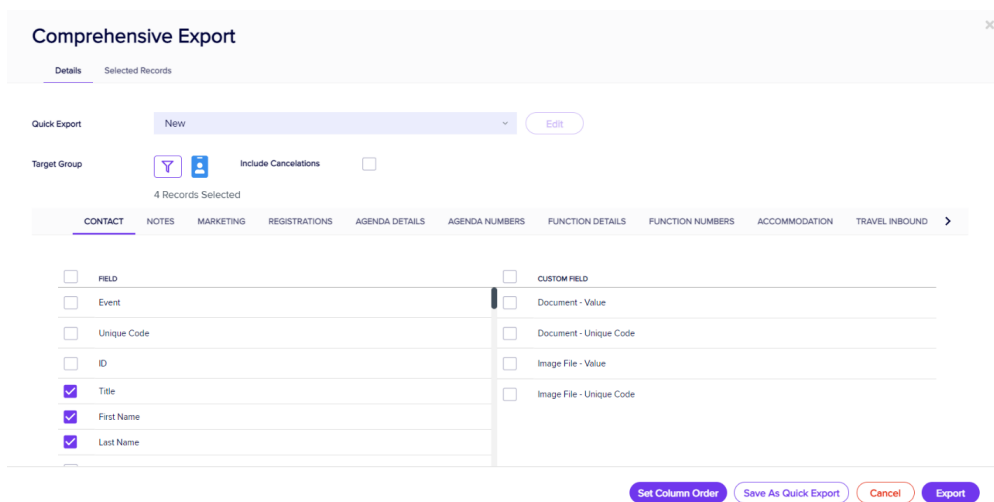
Comprehensive & Standard Exports (including Quick Exports)

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What is a Comprehensive Export?



A Comprehensive Export is called comprehensive because it covers almost everything you might need. You can pick and choose items to create the exact data set you want.

You do this by quickly combining data from **multiple modules** into an exportable “report” – an Excel spreadsheet you can reformat however you like, use to create graphs etc.

To create a Comprehensive Export:

1. From the Express Actions panel, select Comprehensive Export.
2. You can see a number of tabs, showing you the broad areas of data within EventsAir: Contact; Notes; Marketing; Registrations; Agenda Details; Agenda Numbers; Function Details; Function Numbers; Accommodation; Travel Inbound; Travel Outbound; Payment.
3. From each tab, choose the data fields you want included in your report (export).

What you select under each tab is added to your report, so you can create the exact combination of all the data you need.

(For example, your report might show just the first names of any attendees who have a student registration type and are going to Opening Night dinner, and include the number of tickets they purchased, but no other data.)

You can also filter on any Custom Fields you may have created.

4. Use the Target Group filter to add any further filters OR open the Filter and select “Apply” to indicate all records are to be included.

TIP: Even if no filters are needed, you must still open the filter screen and select “Apply” to indicate you want all records included. (If you don’t do this, your report will yield zero results).

You can also tick the box to **Include Cancellations**, and/or use the “**Set Column Order**” button to drag-and-drop each data field into position to set a display order for the exported spreadsheet.

5. Then, to create the actual export (spreadsheet), select either:

- the **Save As Quick Export** button (see below), or
- the **Export** button. If you choose this option, your Excel spreadsheet name will appear at the top of screen with checkmark when it’s ready to download. After opening it in Excel, you can save it with a new name, as a CSV file, etc.

What happens when you select 'Save as Quick Export'?

Just like a Quick Report in the Reporting panel, a Quick Export can be re-used to save you time, and also quickly shared with authorized external parties.

If you choose “Save As Quick Export” for your Comprehensive Export, you’ll use much the same process as for a Quick Report, briefly described below. [Search for Quick Reports in the Reporting articles for more detailed information.]

- Create a Name if you haven’t already
- Enable web publishing [or just save without doing this and edit later]
- Set the expiry date
- Choose “Private” mode (recommended)
- Add authorized email addresses
- Save the QR code / URL to send to those who need access. They can log in with their email address and a link will be emailed to them with the most up-to-date version of the spreadsheet.
- Save

The screenshot shows a 'Quick Export' configuration window. It includes a title bar with a close button (X). The form has the following fields and options:

- Name***: A text input field containing 'Online Attendee Report'.
- Enable Web Publishing**: A checkbox that is checked.
- Expiry Date***: A date and time picker set to '31/01/2023 09:54 AM'.
- Visibility**: Radio buttons for 'Public' (unselected) and 'Private' (selected).
- Valid Email Addresses***: A text input field containing 'meetings@events.com'.
- Buttons**: 'Copy URL' and 'Copy QR Code' buttons.
- QR Code**: A square QR code.
- URL**: A text field containing the URL 'https://centium.eventsair.com/annual-event/exports/viewexport/672ec0f0-ed01-4310-b989-07d8a8f6c1cf'.
- Footer**: 'Save' and 'Clear' buttons.

To see and edit Quick Exports you've previously saved, use the dropdown box when you open up Comprehensive Exports:



Selected Records Tab (including Save as Data Snapshot) in Comprehensive Export

These functions work the same way here as they do in Reports in the Reporting Panel. (Visit the Reports section to read up on this).

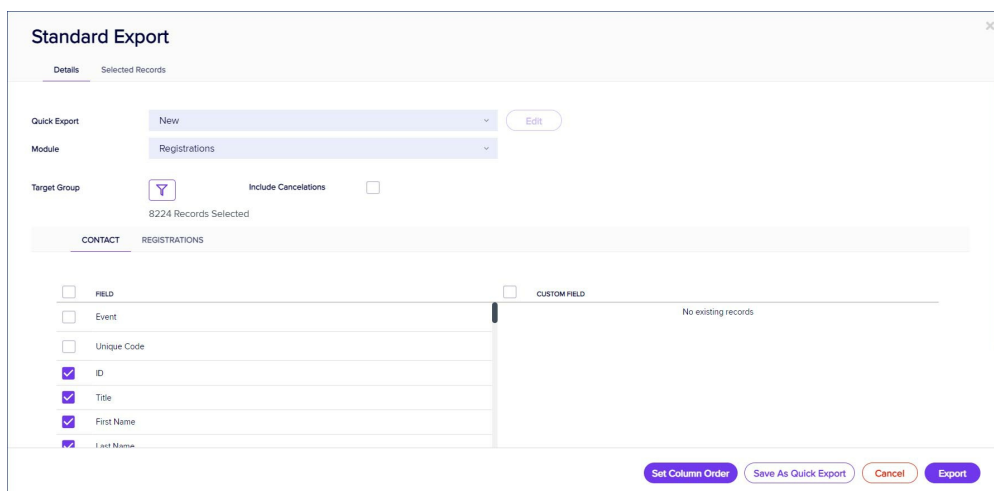
Quick Exports in the Client Info Portal

The [Client Info Portal](#) is given to your approved clients and provides a controlled level of access to attendee data, reports and data exports. Depending on how you've set up the Client Info Portal, Quick Exports can be viewed/saved/exported directly from the Client Info Portal.

What is a Standard Export?

A Standard Export works almost exactly like a Comprehensive Export, except that it only includes data from two modules: the Contact Module, PLUS one other module of your choice.

This makes it an even faster and more convenient option in many cases (which is why it's called 'standard').



Available Modules to add to Contact in a Standard Export

The following modules can be selected (one at a time) to export:

- Contacts — you must select this first, then add one of the below. If you later choose a different second module, it'll replace your previous selection).
- Notes
- Marketing
- Registrations
- Agenda
- Functions
- CE Courses
- Accommodation
- Travel
- Presentations
- Exhibition
- Sponsorship
- Payment

Selected Records Tab & Save as Data Snapshot

These work the same way as they do in the Reporting panel and Comprehensive Exports. You can read more below.

Selected Records tab

After filtering, you can look under the Selected Records tab to see a complete list of the attendees this Express Action will be applied to.

Details		Selected Records	
ID	NAME	ORGANIZATION	
<input checked="" type="checkbox"/>	1	Santos, Aditya	Aurora Foundation
<input checked="" type="checkbox"/>	2	Lee, Aditya	Global Horizons Initiative
<input checked="" type="checkbox"/>	3	Khan, Ahmed	Momentum Ventures
<input checked="" type="checkbox"/>	5	Tanaka, Aaliyah	Pinnacle Ventures
<input checked="" type="checkbox"/>	7	Ma, Aditya	Blossom Innovations
<input checked="" type="checkbox"/>	9	Silva, Aditya	Rising Sun Technologies
<input checked="" type="checkbox"/>	10	Takahashi, Aditya	Evergreen Alliance
<input checked="" type="checkbox"/>	11	Gonzalez, Aaliyah	Spectrum Solutions
<input checked="" type="checkbox"/>	12	Bianco, Aditya	Harmony Enterprises
<input checked="" type="checkbox"/>	13	Ma, Aaliyah	Phoenix Foundation
<input checked="" type="checkbox"/>	14	Costa, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	16	Wu, Aditya	Bright Future Foundation
<input checked="" type="checkbox"/>	18	Ma, Ahmed	Phoenix Foundation
<input checked="" type="checkbox"/>	19	Yamada, Aaliyah	Evergreen Alliance

Total Records: 435

[Save As Data Snapshot](#) [Export To Excel](#) [Cancel](#) [Change](#)

You may see slightly different buttons underneath the list as those that appear in the image above, depending on the Express Action you're using.

- You can use all the Selected Records, or just pick out some from within that list.

- To exclude individual records, manually deselect them. You can select them again to include them if you change your mind.

When you're happy with the list, press the "Start" button to start the Express Action (you can also do this from the Details tab).

Save as Data Snapshot

You'll see this option under the Selected Records tab.

A Data Snapshot captures, or "remembers" the results of a search or report filter so you can re-use the data later. (If you want to save the filter itself, to search on it again later, use the save filter function.)

Read more about using Data Snapshots [in this article](#).

Note: **Save As Data Snapshot** saves the results, not the selection criteria. Any Attendees added *after* you made this selection are NOT included, even if they match your original filter criteria. If you want to save the *Selection Criteria* (instead of the *results*), use the **Save** button inside the Filter screen.

Create Data Snapshot ✕

Create New

Name

Remove After ▼

Append to existing ▼

Replace existing ▼