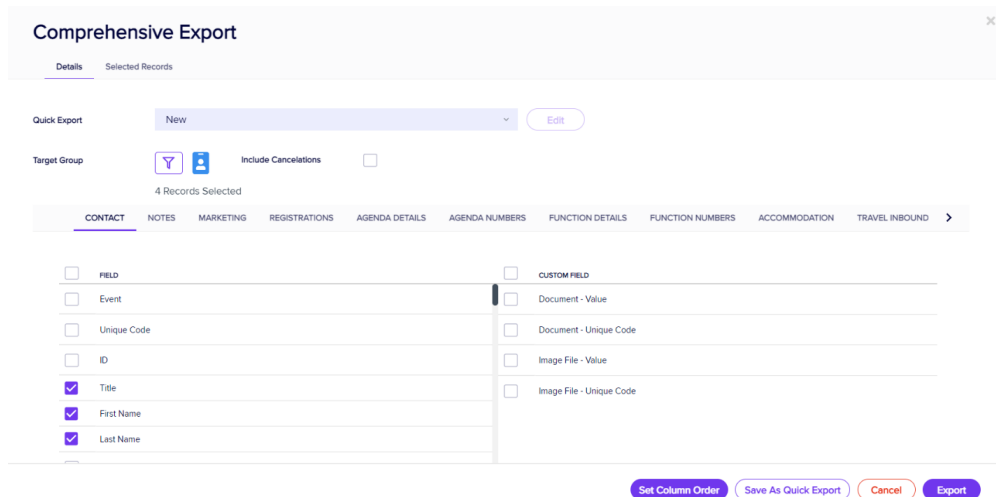# Comprehensive & Standard Exports (including Quick Exports)

Last Modified on 06/27/2023 1:16 am EDT

What is a Comprehensive Export?

A Comprehensive Export is called comprehensive because it covers almost everything you might need to create the exact data set you want.

You quickly combine data from **multiple modules** into an exportable "report" – an Excel spreadsheet you can reformat as you wish, use to create graphs etc.

To create a Comprehensive Export:

1. Open the Express Actions panel and 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 Cancelations**, 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 tick 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

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** <u>one</u> 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').
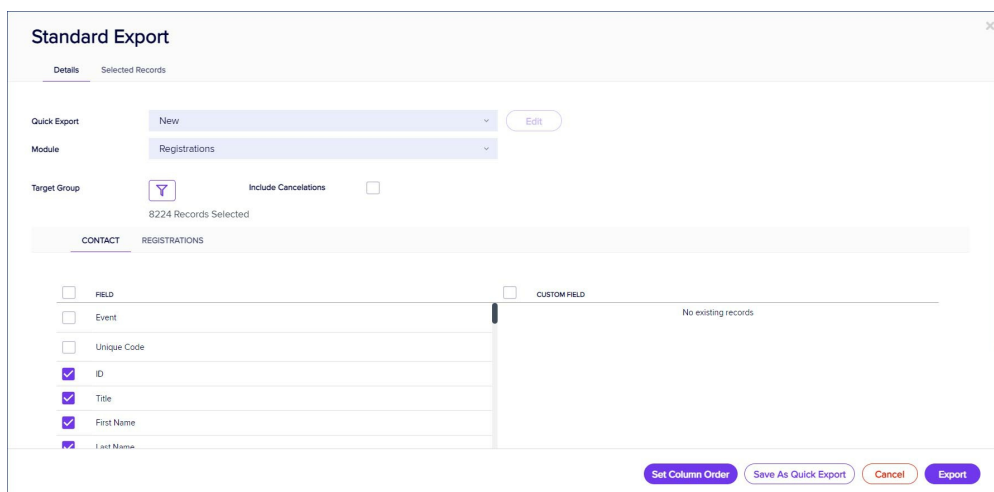
Available Modules to add to Contact in a Standard Export

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

- Contacts — you must select this first, then add <u>one</u> 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.