

# Export Report

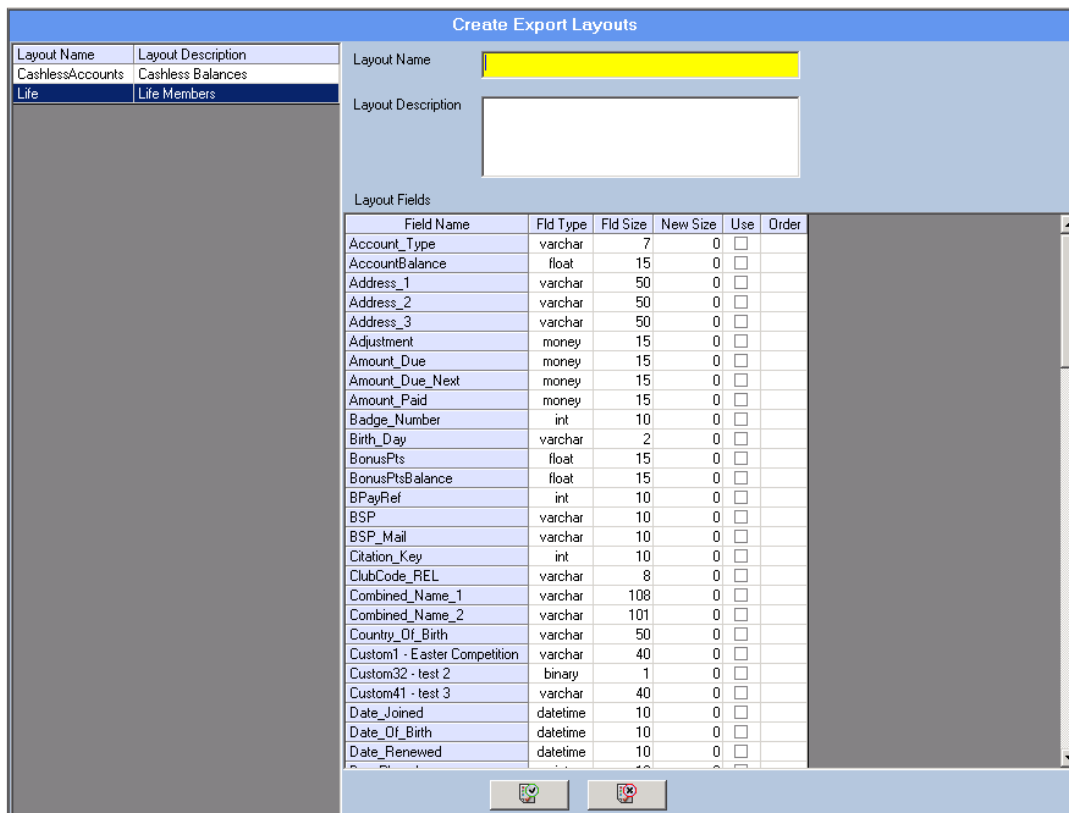
## Create a Custom Export Layout

The Create Export Layout screen enables you to setup a variety of different layouts that can be used for a number of reasons. This function can be used to:

- create your own report if a suitable report is not available in the system,
- create a list that can be used as the data source for things like a mail merge, or
- create a list that can be used by an external source, for example a marketing company sending out the Annual Report to members.

## Getting to the Create Export Layouts Screen

- 1 From the side menu in eMember select the **Setup** option.
- 2 Select the **Create Export Layouts** icon. The Create Export Layouts screen will be displayed.
- 3 Select the **Add** icon. The all fields will be enabled for data entry.



**4 Add** the Layout name and Layout description

**5 Tick** the box of the fields that you require. (remember this is the information you are exporting, these headings will appear at the top of the exported report)

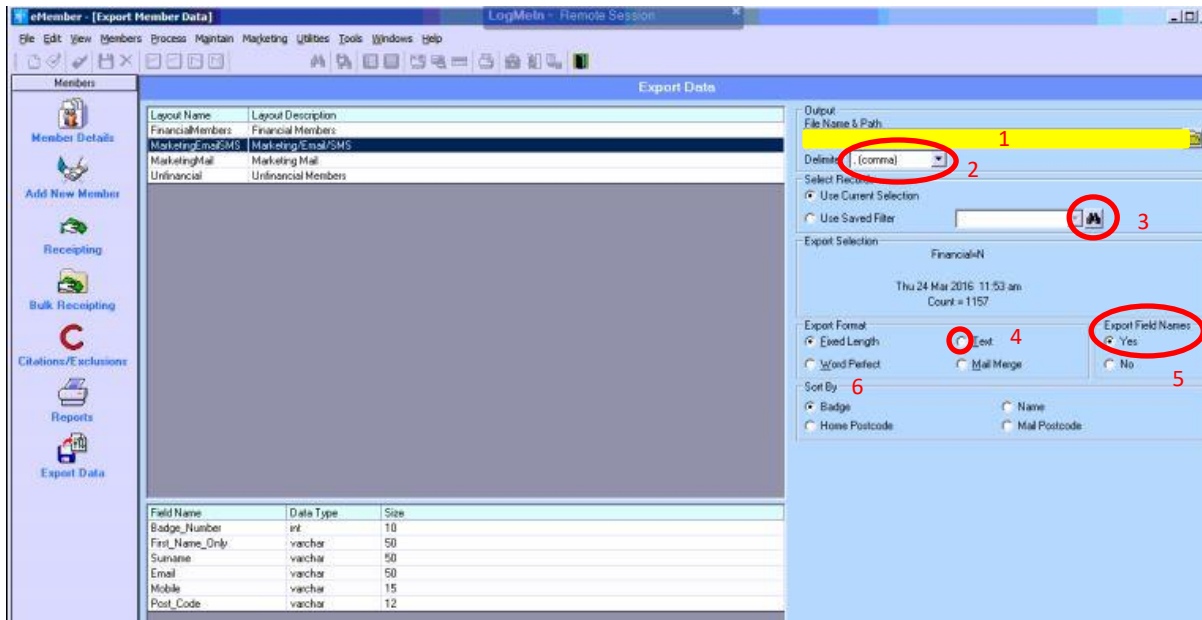
**6** Once all fields have been selected **save** the layout.

**7** Each field will be assigned a number. This reflects which order the information will appear on the export report. If you wish to change to order select **edit** and type over the numbers. **Save**

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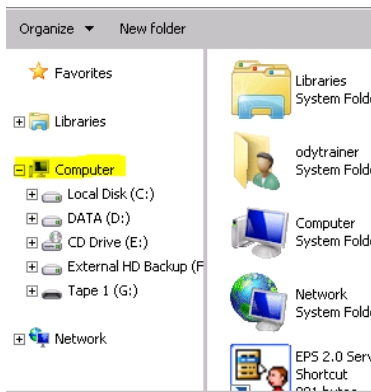
## Running an Export Report

- 1 From the **Members** menu select the **Export Data** option. The Export Data screen will be displayed.
- 2 From the left hand side panel select the layout to be used. The relevant selection criteria will be displayed.



## Procedure

- 1 In the **File Name and Path** field enter or browse to where the file will be saved. Type **.csv** at the end of the file name.



When you click on the folder you need to find the correct path under the computer section.

It will have a grey and green symbol at the front and may be a second C Drive. It will not be the desktop as this is the server desktop and not your computer.

- 2 From the **Delimiter** dropdown box select the, [comma] option.

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**3** Click on the **Binoculars** to open the Select Members screen. Click on the **Custom Search** tab and select the fields you would like. See Below Image. (When creating the export layout you selected **WHAT** information you wanted to see, now you are selecting **WHO** that information relates to)

Field	Parameter1	Parameter2
<input type="checkbox"/> Birth Day	1	31
<input type="checkbox"/> Birth Month	1	12
<input type="checkbox"/> Cashless Enabled	Y	
<input type="checkbox"/> Country of Birth		
<input type="checkbox"/> Custom-Gaming Opt 1	%A%	%Z%
<input type="checkbox"/> Direct Debit		
<input type="checkbox"/> EGM Promo Enabled	Y	
<input type="checkbox"/> Eligible Promotion		
<input checked="" type="checkbox"/> Financial	Y	
<input type="checkbox"/> Gaming Enabled	Y	
<input checked="" type="checkbox"/> Gender	M%	
<input type="checkbox"/> Group		
<input type="checkbox"/> Has Email Address	Y	
<input type="checkbox"/> Has Home Phone No	Y	
<input type="checkbox"/> Has Mobile Phone No	Y	
<input type="checkbox"/> Has Work Phone No	Y	
<input type="checkbox"/> Hold Mail	Y	
<input type="checkbox"/> Home Address Line 1	%A%	
<input type="checkbox"/> Home Address Line 2	%A%	
<input type="checkbox"/> Home Address Line 3	%A%	
<input type="checkbox"/> Home Post Code	0000	9999
<input type="checkbox"/> In Bulk Mail	Y	
<input type="checkbox"/> Join Date	dd/mm/yyyy	dd/mm/yyyy
<input type="checkbox"/> Join Method	1	
<input type="checkbox"/> Language		
<input type="checkbox"/> Locked Balance	0	999999
<input type="checkbox"/> Locked Balance Lev	0	999
<input type="checkbox"/> Mag Card Lost	Y	
<input type="checkbox"/> Mail Address Line 1	%A%	
<input type="checkbox"/> Mail Address Line 2	%A%	
<input type="checkbox"/> Mail Address Line 3	%A%	
<input type="checkbox"/> Mail Flag	Y	

Gender (M% or F%)

Parameter1=Value  
Parameter2=Blank

M% or F%

Select Saved Filter

Icons: Search, Filter, Print, Export, Confirm, Cancel

**4** In the **Export Format** panel select the **Text** option.

**5** From the **Export Field Names** panel select the **Yes** option to list the headers in the export.

**6** From the **Sort By** panel select the option that the data will be sorted in the export.

**7** Select the **Green Tick**. A confirmation message will be displayed when the export is complete.

**8** Browse to where the file was saved and open your exported data.

**9** You can now sort by other columns if you need to e.g. birthdate if you want to put them in age order.

**10** Print Report.