

## Export merchandising boards

You can export any of the board you have created into Excel or Power Point file formats. To do so, follow these steps:

1. Click **Export**, the following window appears:

Export

1 Data 2 Format 3 Filter 4 Options 5 Review

Welcome to the Export Wizard. The following steps will guide you through the process of exporting any required information from this catalog. Please begin by selecting what information you would like to export. Or select one of the saved options

- ☐ Articles
- ☒ Merchandising Board
- ☐ Orders
- ☐ Order Form
- ☐ Requests
- ☐ Forecast Summary
- ☐ Forecasts
- ☐ Bucket Level Attributes
- ☐ Change Logs

BACK NEXT

If options are saved, a menu appears enabling you to select the export option you want as shown below:

Export

1

2

3

4

5


Data

Format

Filter

Options

Review



Welcome to the Export Wizard. The following steps will guide you through the process of exporting any required information from this catalog. Please begin by selecting what information you would like to export. Or select one of the saved options

SELECT ONE OF THE SAVED OPTIONS

Select an option

- ☐ Articles
- ☒ Merchandising Board
- ☐ Orders
- ☐ Order Form
- ☐ Requests
- ☐ Forecast Summary
- ☐ Forecasts
- ☐ Bucket Level Attributes
- ☐ Change Logs

BACK

NEXT

Select the option you want, the Format window is skipped. You can delete any of the saved options by hovering the mouse over it then clicking the **Delete** icon.

2. Select “Merchandising Board”, if no option is selected, then click **Next**, the following window appears:

Export


✓  
Data

②  
Format

③  
Filter

④  
Options

⑤  
Review



Select the file format of the required output

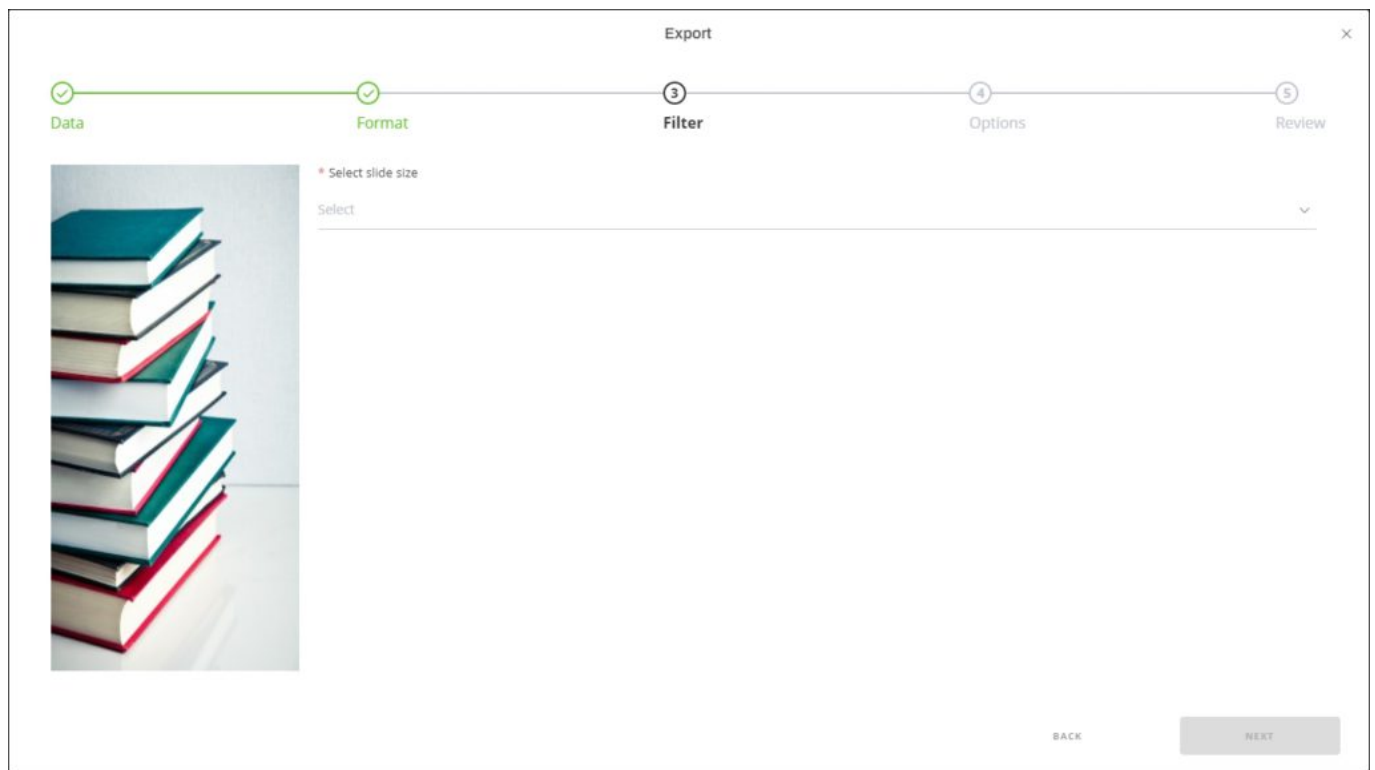
☒ Excel

☐ PowerPoint

BACK

NEXT

3. Select the format to which you want to export the board, if you select Excel, you can select the attributes you want to include in the output file and select whether to include images or not,
4. Click **Next**, if the selected format is Power Point, the window appears as shown below:



5. Select the slide size, slides are displayed,
6. Click the checkbox next to folder(s) or slide(s) you want to include in the exported file,

**Note:**

- By default, the selected slide on the merch board will be selected when you use the Export function.

7. Click **Next**, the following window appears:

Export

✓

Data

✓

Format

✓


Filter

4

Options

5

Review



☐ Include Favorite Tags

☐ Add AR Indicator

☐ Add GHL Indicator

☐ Add B&T Indicator

☐ Include summary report

Reports

Select

Article attributes to display

Select

Image Size

BACK

NEXT

## Note:

- The above window will also be skipped if you select any of the saved options.

8. Select whether you want to include favorite tags in the exported slides,
9. Select the indicators you want to include in the exported slides,
10. Select the slider button next to Include Summary Report, if you want, then select the reports you want,
11. Select the attributes to be displayed for articles,
12. Select the size for article images,
13. Select whether you want to include the inactive articles in the summary by clicking the slider button, then click **Next**, the following window appears:

Export


✓ Data

✓ Format

✓ Filter

✓ Options

⑤ Review



We are now ready to generate the exported data. Please review the summary below then hit the "Finish" button. Please note that, depending on the size of the data, it might take a few seconds to a few minutes for your file to be generated.

Number of selected slides	2
Merch Selected Slides	Default - Default Winter - Sweatshirts

SAVE OPTION

BACK

FINISH

You can save the options you selected, if you want, by clicking **Save Option**, the following window appears:

Save Option

×

\* PROVIDE A NAME TO SAVE YOUR OPTIONS

Provide a name to save your options

Please provide a value

☐ Save as catalog wide option

CLOSE

SAVE

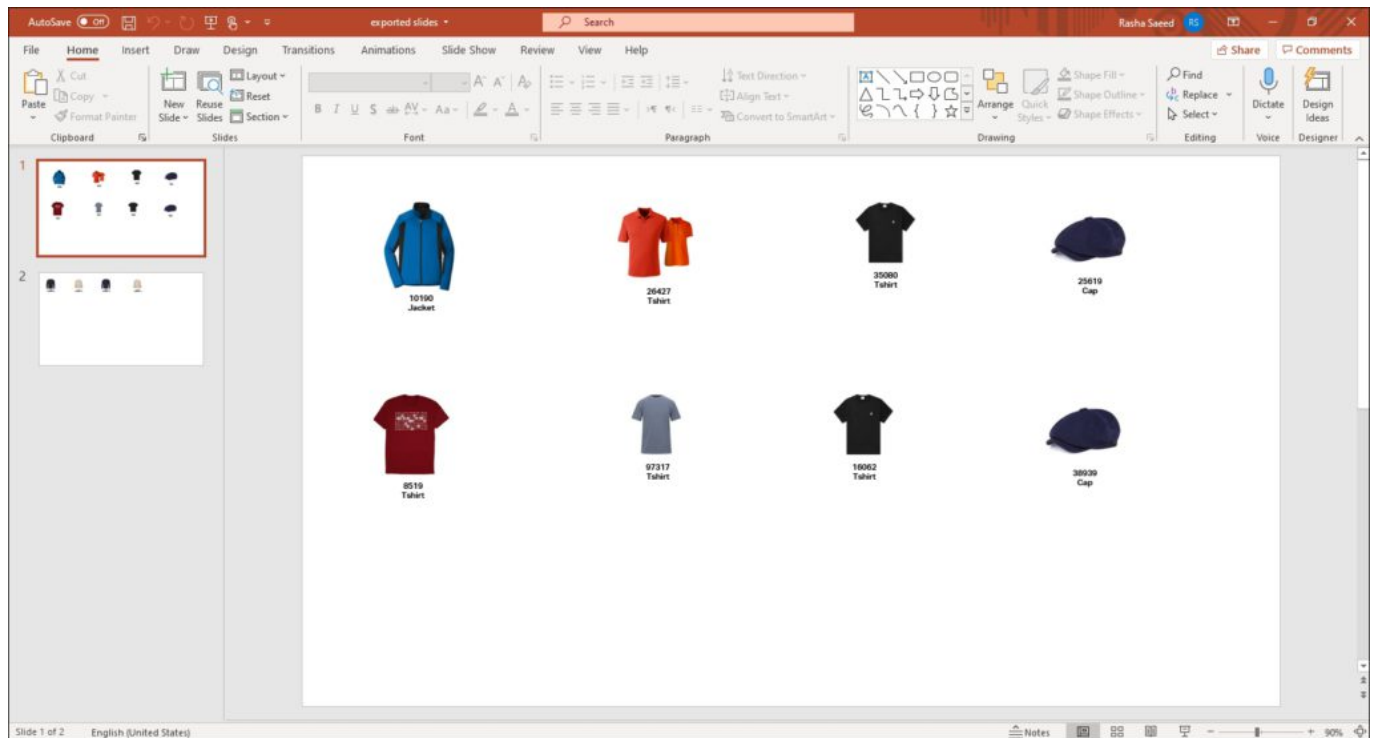
Enter the name you want then click **Save**.

- Click **Finish**, a window appears to enable you to enter the file name and select where to store it on your computer. If you selected to include images, progress for

downloading the images is displayed.

The exported board appear as follows:

- If the selected format is Power Point:



Charts are also included in the Power Point file. You can perform different actions on the file such as updating the design, adding more slides, and printing, etc. If any of the articles has a value for the "AR Indicator" attribute, this is indicated by a star symbol.

- If the selected format is Excel, the file appears as shown below depending on the attributes selected:

