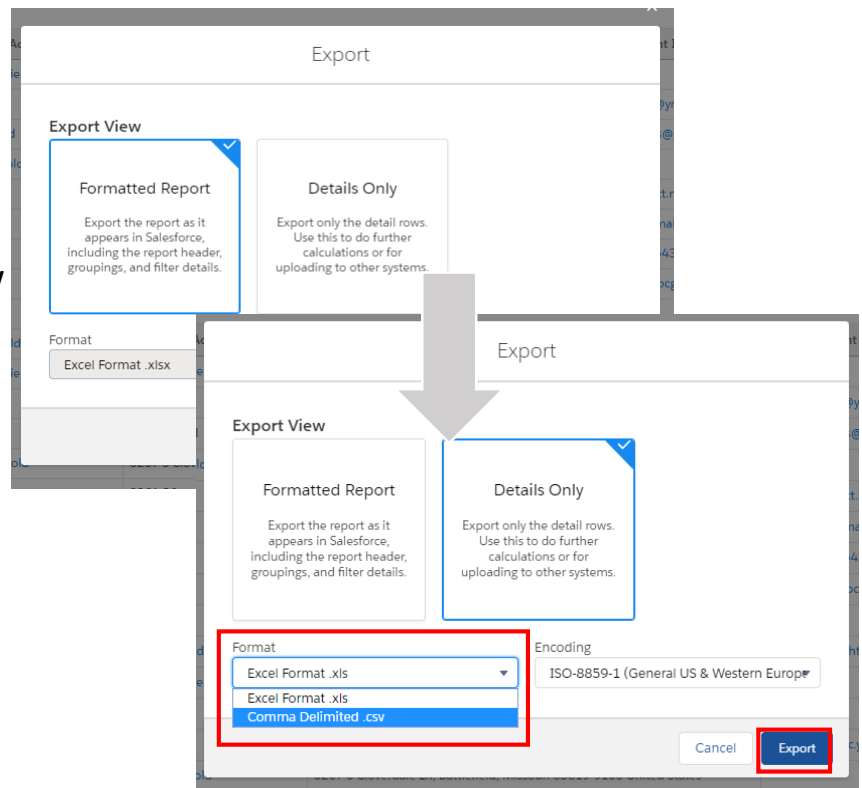
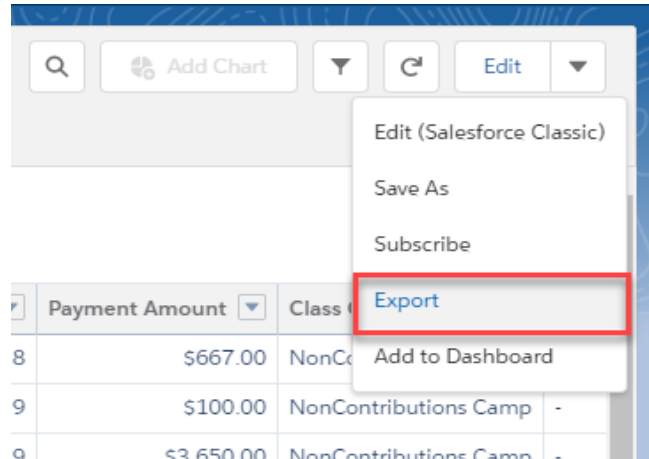


Steps to Export a Report

1. Begin in **Reports Tab**, and find the report you wish to Export.
2. Go to the **Edit** drop down menu and click on **Export**.
3. Two choices for **Export View** will appear. **Formatted Report** will export in Excel .xlsx format.
4. The **Details Only** view lets you download in an Excel format, OR a Comma Delimited (.csv) format.
5. Select one of the **Export Views** (and download format) and click **Enter**.



- After you have clicked on **Export**, the file will appear as a download in the lower tray.

15	PMT-19981359	Pete N
16	PMT-19981360	Alexis
17	PMT-19981361	Michel
18	PMT-20045743	Brett T
19	PMT-20344211	-
20	PMT-19260976	Tina K
21	PMT-10262626	Kurt C

- Click to download the file, and then save it to your desktop.

report15647575812....xls

- Depending on which **Export View** you selected, the download will display as either an Excel or a .csv file. (Excel shown in example below)

Payment Number	Linked Account Id	Primary Contact	Full Name	Account Name	Mailing Address
PMT-19547484				Money Orders/Cashiers Check	

Training Notes:

- Be sure to review the [Data Security and Protection](#) policy whenever downloading any data from our secure system in YL Connect!
- With the **Details Only** view selection, you can choose **Format** and there is also a dropdown for **Encoding**. Standard Encoding is the default selection, but there are other options available.